QuitManager Guidance Note
Creating a new client and episode
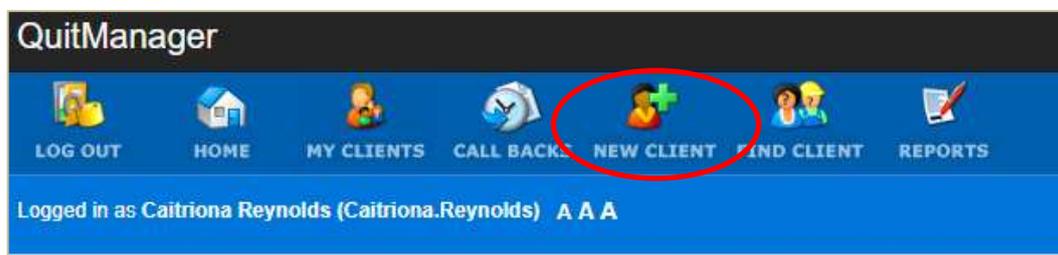

The Purpose

This explains how to create a new client and an episode of care on QuitManager.

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1. **Create Client**
2. **Create episode – this is broken into 2 steps**
3. **Send SMS – GDPR leaflet**
4. **Record medical and smoking history.**

1. Create Client

- Select "New Client"

- Complete information for New Client. All items marked with $*$ are mandatory fields

- Click "Create Client"

If a record already exists for the client, please refer to Guidance Note 5: Episode creation for a client with an existing record on QuitManager.

If the client has an open episode of care with another Advisor, please contact the SuperUsers (quitmanager.tfi@hse.ie), referencing the Client ID.

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2. Create episode

Episode Creation Step 1

- Select the correct clinic for your client

Episode Creation Step 2

- Complete **mandatory** fields and other fields as appropriate
- **Please remember to:** complete the demographic fields and the referral source

3. Send the GDPR text message

- This must be done as soon as the episode has been created
- Select "Client SMS" from the left hand column

- Client details will be populated already. Select "Choose Template"

- Select 15 "QuitManager Leaflet GDPR"
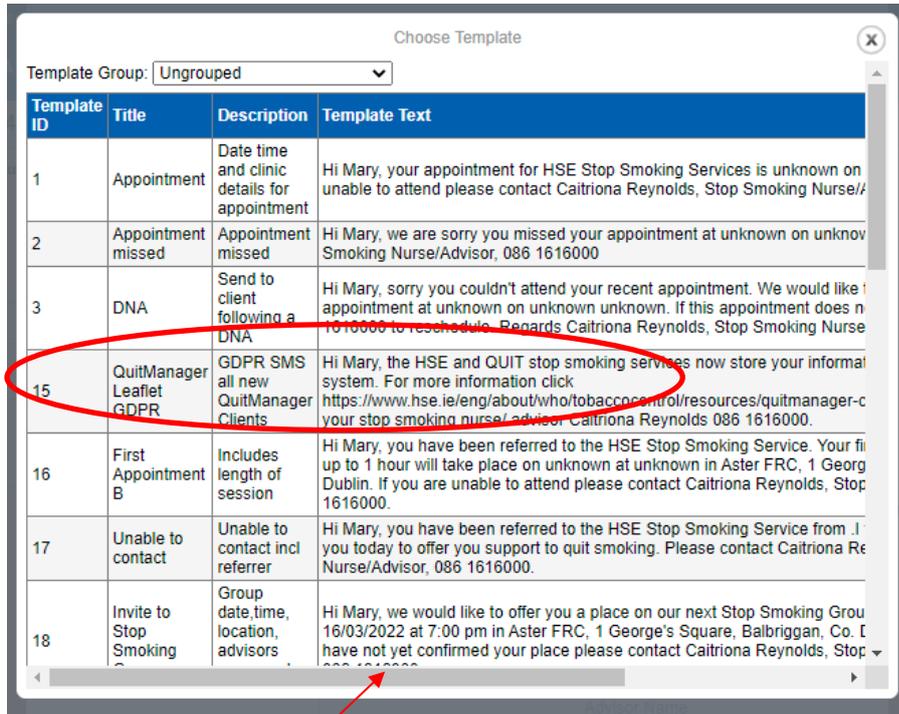
- You may need to scroll to the right to find the "Select" tab

- Before sending, check that your number is correct and edit if required. Only one advisor's phone number can be added to a clinic. Many clinics have more than one advisor

- Send message

If the client does not have a mobile number, you must give them a hard copy of the Client Information leaflet, available to download HERE. You must record having done this by using the "Add Comments" tab.

4. Complete Medical and Smoking History

- Select "Medical" from the left hand column

- If the client has no medical condition click the box as below

- If the client has a medical condition, click the appropriate box, see example below:

- Only use the "Any Other Details" box to enter additional information or if there is no appropriate box to choose from under "Medical Conditions"

- Complete the Smoking History fields at the bottom of the page before selecting "Save Changes"

Further reading:

Client Information Leaflet (GDPR leaflet), available to download from HERE

Guidance Note 5: Episode Creation for Client with an Existing QuitManager record, available to download from HERE

Contact Us:

If you have any further queries please email quitmanager.tfi@hse.ie

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