

How do I search for a client?

This section discusses how to search for clients in your client database.

Upon initial login to Clarity Human Services, you are placed directly into the Search tab. This is the central hub of the system, and provides access to your clients.



Before creating a new client, you must search to ensure that the client does not already exist in the database.

Clarity provides an auto-suggest mechanism, so it is an excellent idea to enter only partial first and last names when searching for a client. As you begin typing your search criteria, the system will automatically search the database and display potential clients that match your progressive criteria. This tool makes it much easier to find clients with a name that is difficult to spell.

For example: If you are searching for Betty Robinson, entering a "**Bett**" in the search field makes it much easier to find the correct client.



When auto-suggest locates a match, simply click on the record to enter the client's profile.

The unified search box allows for many different types of criteria to be entered, either on its own, or in combination with other terms.

Search by Name

First Name, Last Name, or partial sections of the client's name can be entered to help locate the client record.

Aliases, Maiden Names, and Nicknames

Many clients have aliases, or past names. (i.e., maiden names, nicknames, etc.), which can complicate client search. The search feature allows you to enter a list of names a client goes by when searching for that client.

For example, if a client receives services using the name 'Jerry Matthews' in one agency and 'Joe Matthews' in another agency, the agency serving the client as Joe Matthews **would add "Joe Matthews" to the alias field** so that both names appear in future searches.

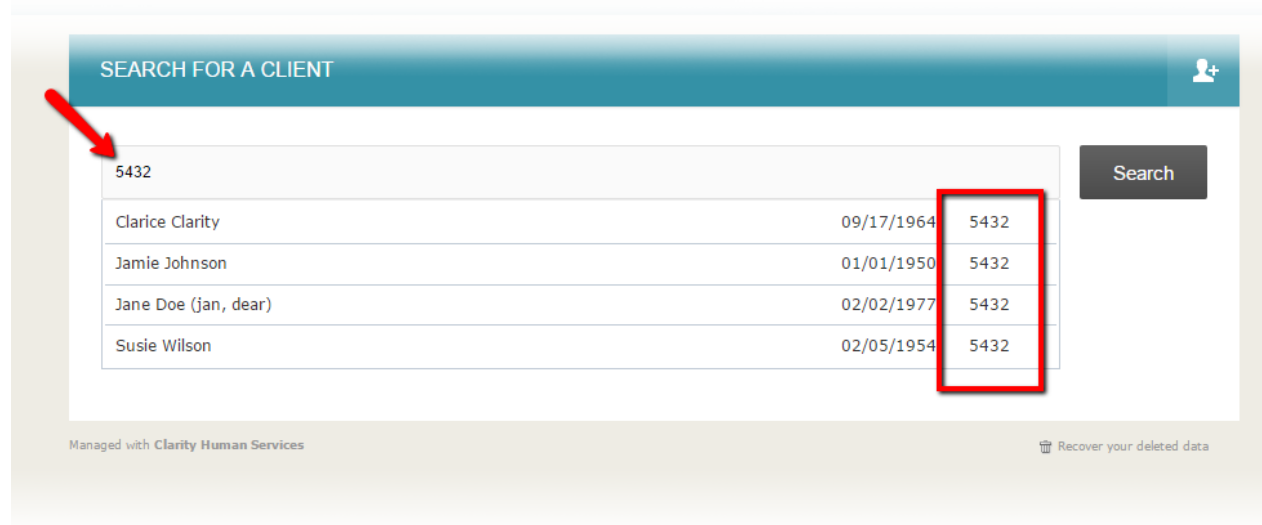
The screenshot displays the Bitfocus System search interface. At the top, the header includes the system name, user profile, and navigation tabs. The main search area features a search bar with the text 'dear' and a dropdown menu showing a search result for 'Jane Doe (jan, dear)' with associated birth date and ID. A red box highlights the search bar and dropdown, with a red arrow pointing to the dropdown. To the right, a sidebar lists recent searches. The footer contains management and recovery links.

This feature is available from:

- [Main search screen](#)
- [Household Management screen](#)
- [Attendance screen](#)

Search by Social Security Number

A full social security number can be entered, or portions of each section can be entered. For example: the last four digits of a client's SSN can be entered.



SEARCH FOR A CLIENT		
5432		
Clarice Clarity	09/17/1964	5432
Jamie Johnson	01/01/1950	5432
Jane Doe (jan, dear)	02/02/1977	5432
Susie Wilson	02/05/1954	5432

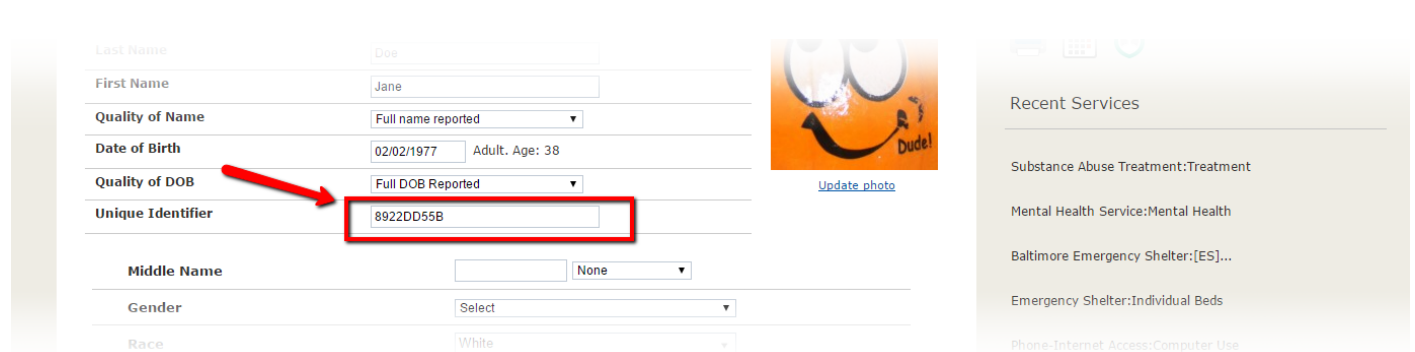
Managed with Clarity Human Services Recover your deleted data

Search by Date of Birth

A full date of birth can be used, with the following formats: 05/15/1995, 5/15/95, or 1995-05-15.

Search by Unique Identifier

Every client created in Clarity is issued a Unique Identifier, which is 9 characters in length. Searching based on the Unique Identifier will take you directly to the Client's profile screen, bypassing the need to search through the auto-suggest list.



Client Profile Form:


- Last Name: Doe
- First Name: Jane
- Quality of Name: Full name reported
- Date of Birth: 02/02/1977 Adult, Age: 38
- Quality of DOB: Full DOB Reported
- Unique Identifier: 8922DD55B
- Middle Name: None
- Gender: Select
- Race: White

Recent Services:

- Substance Abuse Treatment:Treatment
- Mental Health Service:Mental Health
- Baltimore Emergency Shelter:[ES]...
- Emergency Shelter:Individual Beds
- Phone-Internet Access:Computer Use

Refining Your Search

As the client database grows, you may find that the results listed can be large for a common name (e.g John).

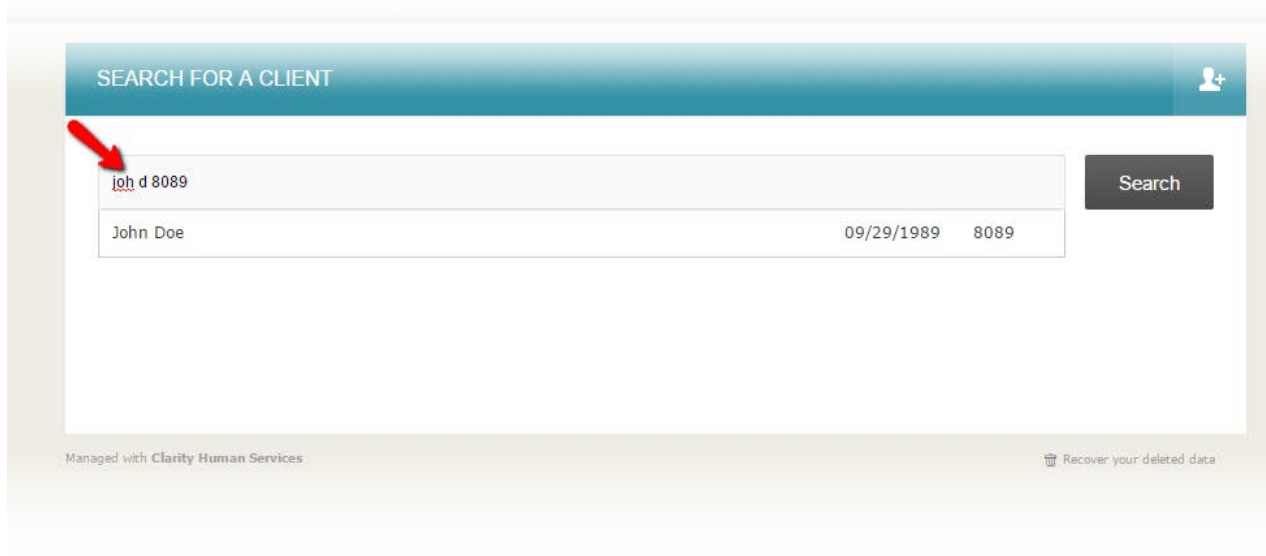


The screenshot shows a search interface with a teal header bar containing the text "SEARCH FOR A CLIENT" and a user icon. Below the header is a search input field containing the text "John". To the right of the input field is a dark grey "Search" button. Below the input field is a table of search results. The table has three columns: Name, Date of Birth, and Social Security Number. The results are as follows:

Name	Date of Birth	Social Security Number
John		
Alfred Johnson	06/15/1980	0231
Alice Johnson	02/09/2010	4233
Amy Johnson	07/07/1966	5989
Baby Johnson	11/11/2012	4141
Carla Johnson	08/02/1974	2233
Child Johnson	05/01/2008	8974
Cindy Johnson	01/11/2009	0000
Darla Johnson	06/11/1985	7625
Darryl Johnson	09/13/1970	7784
Don Johnson	02/21/1965	4987
10 more. Please keep typing to narrow your search.		

Two red arrows point to the search input field and the "10 more" link at the bottom of the table. The word "Manage" is partially visible on the left side of the table, and "Recover your deleted data" is visible on the right side.

When a large result set is listed, you can further refine your search by combining your search terms until the result is shorter, or you find your given client. For example, a search term of “John W 7403” will search for a combination of a partial First Name, Last Name, and the last four digits of the Social Security Number.



Once you have found your client, simply select their name. This will take you to the client's profile page.