How Do I Search for a Client?

Users search for and <u>create new client records</u> from the *Search* page. Users can set the *Search* page as the default *Home Screen* for an agency or user in the <u>Agency</u> <u>Overview</u> and staff member <u>Account Settings</u>.

To access the *Search* page, click the *SEARCH* tab in the upper right-hand corner.



Records you recently viewed will appear in the right sidebar. The system retains this list after you log out and will display it when you log back in and view the *Search* screen. Clicking a client name navigates you to the associated client record.

SEARCH FOR A CLIENT ADD CLIENT (+)	Your recent client searches:		
	Tom Doe	6	
Q Enter search terms for a client SEARCH	Bob White		
Use full name, partial name, date of birth or any combination.	Sally Smith		
A Please confirm the client does not already have a record in the system before creating a new one.	Jane Doe		
Managed with Clarity Human Services			
	John Doe		

Any <u>Search Page Notification text</u> that the system administrator has entered will appear below the search box.

Recover deleted data allows system administrators to search for and restore deleted client records.



Searching for Clients

Clarity Human Services has an *Auto Suggest* feature that allows you to enter only partial first and last names when searching for a client. As you begin typing your search criteria, the system searches the database and displays potential results that match your search terms. This feature can be enabled by <u>system administrators</u> or by users in <u>Account</u> <u>Settings</u>.

SEARCH FOR A C	LIENT						ADD CLIENT	r 🕀
Q Jane Doe							SEARCH	
		DOB		SSN	ROI			
Jane Do	e 🖓	02/02/1977	Age: 43	1234	Missing			
Jane Do	е	10/10/1980	Age: 39	4321	Missing	one.		