

HMIS Document

ClientTrack User Guide

Searching for a Client

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ClientTrack User Guide – How to Search for a Client

- 1. Go to the second main menu option, "Clients" (the icon in the blue side bar menu that looks like three people).
 - a. The menu to the right of the blue side bar will adjust to display different options. You should now see the option for "Find Client" (it has a magnifying glass in front of it). Click that option.



- 2. The "Find Client" search screen allows users to look up a client by first name, last name, middle name, last/first name, a client ID, social security number, and/or date of birth.
 - a. Entering into any of these fields will allow the system to search for possible matches. If you have a client ID, you can simply enter into the Client ID field to go directly to that client record.
- 3. If there are no records in the system that match your search, it will say so below the search form. That is the user's cue to begin a new intake to create that participant in the system.
 - a. If there are possible matches, they will appear in the results. Compare the name, SSN and DOB to determine whether the record matches your participants' information.
- b. If there is a match, select the participants' name to go to their record.

Find Client		< 🕑 Find Client	< 6
Use the section criteria below to fi criteria. Social Security Number an	ind your client. To narrow the search, fill in more than o nd Birth Date are the best fields to narrow your search.	Use the section criteria below to find your Security Number and Birth Date are the be one h. First Name:	client. To narrow the search, fill in more than one criteria. Social ast fields to narrow your search. tariah
First Name:	Mariah	Last Name: C	arey
Last Name:	Carey	Middle Name:	
Middle Name:		Full Name (Last, First):	
		Client ID:	
Full Name (Last, First):		Social Security Number:	
Client ID:		Birth Date:	IM/DD/YYYY 🗎
Social Security Number:			Q Search
Birth Date:	MM/DD/YYYY		No month found
	Q Searc	First Name Last Name	Middle Name SSN Birth Date