HMIS Document

ClientTrack User Guide

Searching for a Client

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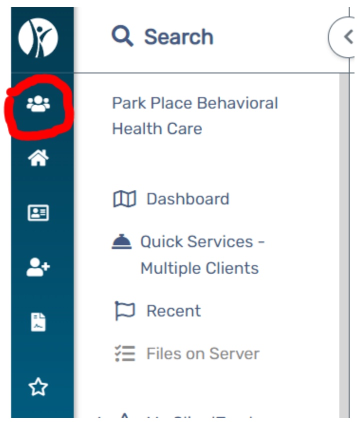
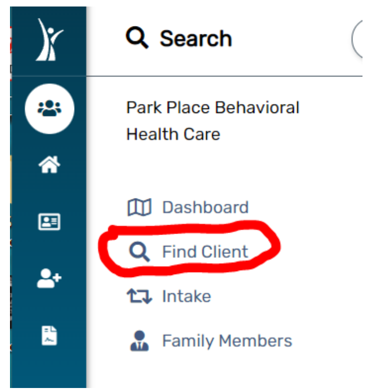
ClientTrack User Guide – How to Search for a Client

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.