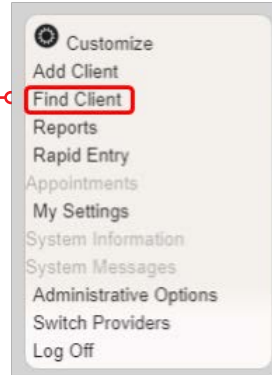Always search for an existing client record before entering a new one, even if the client is new to your organization. This will help reduce duplicate records.

To search, click **Find Client** in the main menu.

⚙ Customize
Add Client
Find Client
Reports
Rapid Entry
Appointments
My Settings
System Information
System Messages
Administrative Options
Switch Providers
Log Off

Search by the client's Last Name, First Name, and/or Client ID, Unique ID, or Client UCI (if known). Be sure to use the client's legal name. When searching for names, remember:

• Avoid embedded spaces, special characters, including hyphens (' - & etc.), and accent marks.

• Place middle names (or initials) in the middle name field only (never in first- or last-name fields).

• Do not use nicknames (i.e. "Ken" for "Kenneth").

• If a client has two last names enter both into the last name field. If the client has a legal ID, enter the name as it is stated on the ID.

• Inputting "W" for first name will search for all clients whose names begin with a W. This will generate more search results, but will be more thorough in preventing duplicates.

• If the client has conflicting documentation, verify the correct name with the client.

Find Client

Last Name: [   ]
First Name: [W   ]
DOB: [   ] 📅
ClientID: [   ]
URNorEURN: [   ]
Encrypted UCI: [   ]
Active Only: ☑

After finding the client in the search results, highlight the row.

| OConnor Jr | William | 11/24/1984 12:00:0 | WLOO1124841U | 9B6EQBeEw | 7D8674594B599BC | Exact |

Find Client > Search Results
View Details Custom Forms Back

Search Results

Click **View Details**, or double click on the highlighted client, to go to the client information page and edit client information.

Simply close out of the window to save changes.

⚙ Customize
Demographics
Client Report
Encounter Report
Services
Annual Review
Case Notes
Custom Forms
Vital Signs
Hospital Admissions
Medications
Labs
Screenings
Screening Labs
Immunizations
Diagnoses
Sharing Requests
Referrals
Relations
Counseling and Testing
Orders
Custom Subform
Appointments
User Messages
Search Change Details
Duplicate Client
Performance Measure Status
External Links
Close

Find Client > Search Results > Demographics
Delete Client Back

⊙ Demographics

Personal Info	Name: OConnor Jr, William Gender: Male DOB: 11/24/1984
Change URN	WLOO1124841U
Contact Information	No description supplied
Race/Ethnicity	White, Asian (Korean)
HIV Risk Factors	No description supplied
Vital Enrollment Status	Vital Status: Alive Current Status: Active
Eligibility	Not Eligible for Ryan White
HIV Status	Unknown
Provider Notes	No description supplied
MassCARE	View or Edit the client's MassCARE information
Custom Fields	View or Edit the client's Custom Fields information