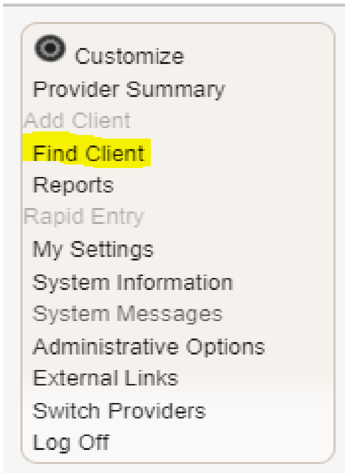
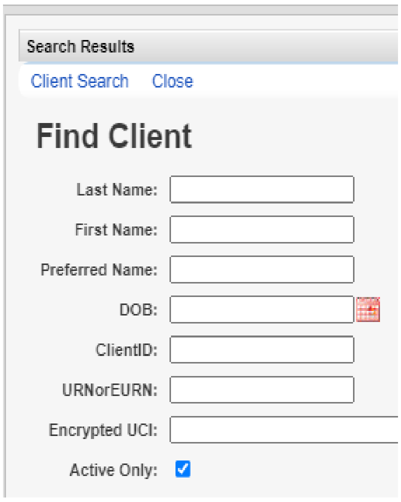
To search for clients in CAREWare, follow these instructions:

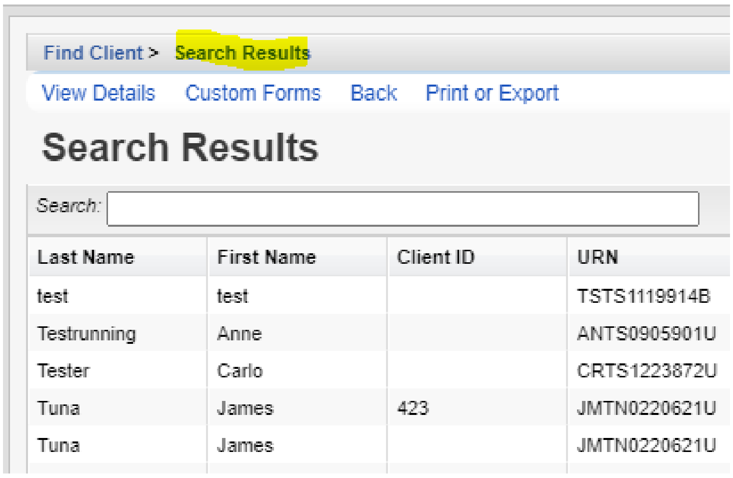
1. Click *Find Client*.




2. Enter at least one search term.




3. Click *Client Search*.

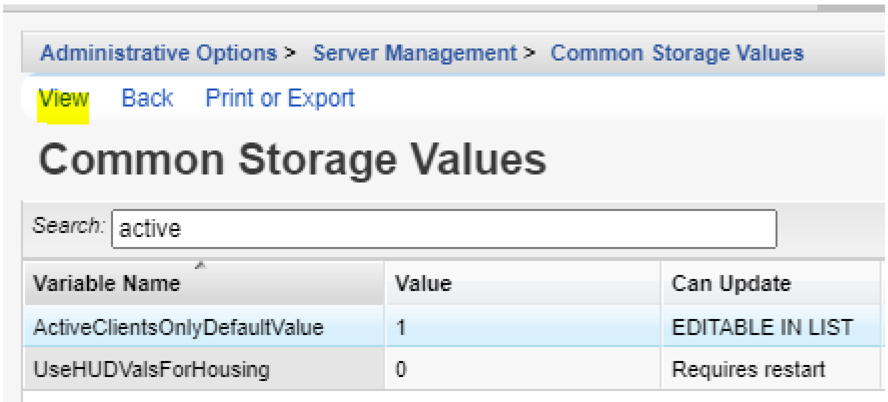



4. Click a client.
5. Click *View Details*.

At this point the client's record has been opened. If *Custom Forms* is clicked instead of *View Details*, the client's record is opened at the *Custom Forms* window.

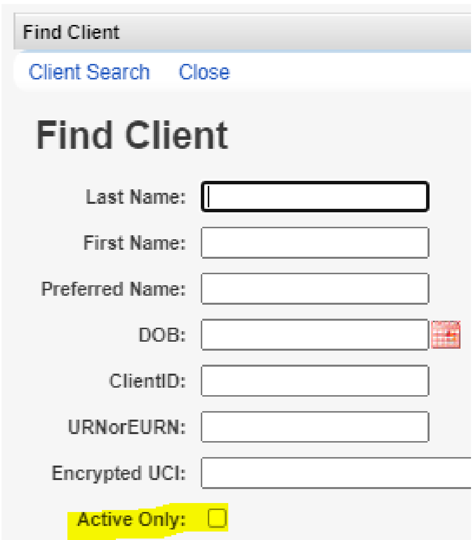
*Find Client* searches are limited to *Active Clients* by default. That setting can be adjusted in the *Common Storage Settings* by following these instructions:

1. Log into Central Administration.
2. Click *Administrative Options*.
3. Click *Server Management*.
4. Click *Common Storage Values*.
5. Type *Active* in the search field.
6. Click *ActiveClientsOnlyDefaultValue*.
7. Click *View*.




8. Click Edit.
9. Change the Value(StringValue) to 0.
10. Click *Save*.

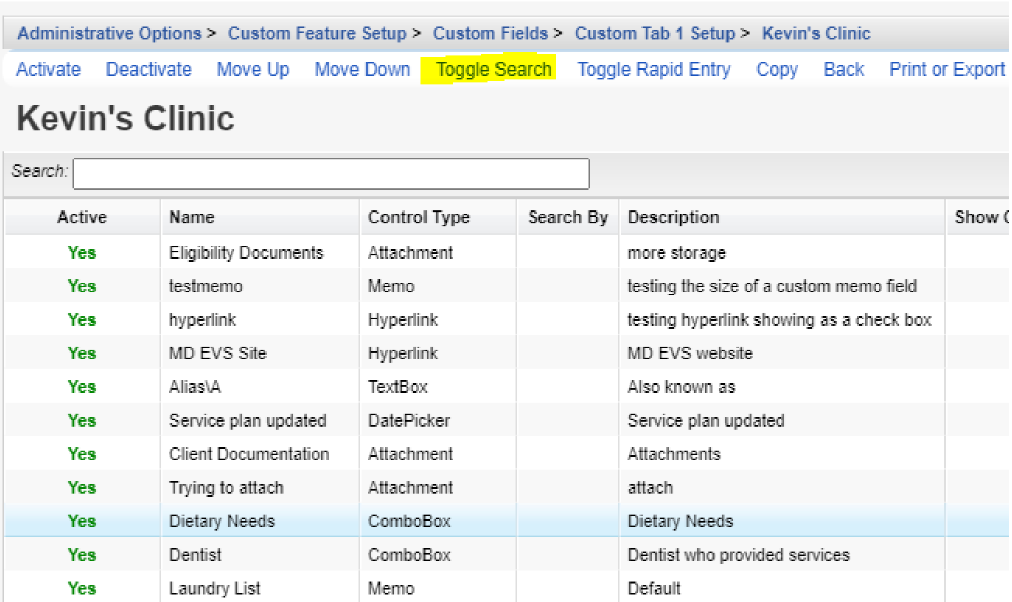
At this point, *Active Only* is unchecked when users click *Find Client*.




Note: Active clients are clients that lack a case closed date. When client records have an enrollment status other than active, they still need to have a case closed date for them to be excluded from Find Client results if Active Only is checked.

The search criteria for *Find Client* can include custom fields by following these instructions:

1. Click Administrative Options.
2. Click Custom Features.
3. Click Custom Fields.
4. Click *Demographics Tab Custom Field*, one of the Custom Tabs, or Central Custom Tab.
5. Click an active custom field to highlight it.
6. Click Toggle Search.



Administrative Options > Custom Feature Setup > Custom Fields > Custom Tab 1 Setup > Kevin's Clinic

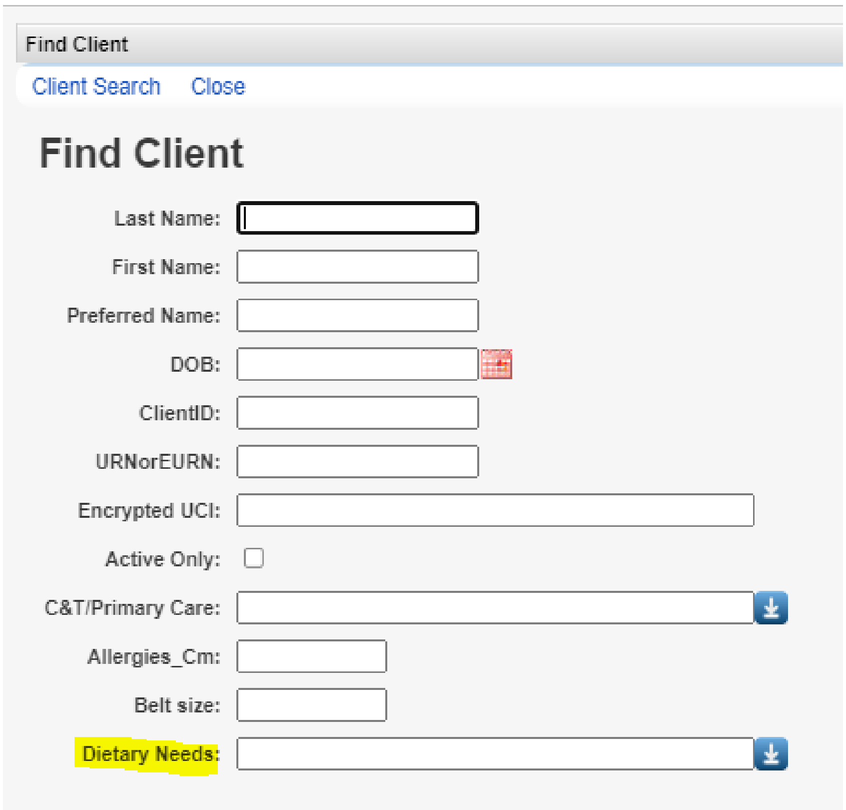
Activate Deactivate Move Up Move Down Toggle Search Toggle Rapid Entry Copy Back Print or Export

Kevin's Clinic

Search:

| Active | Name | Control Type | Search By | Description | Show ( |
|---|---|---|---|---|---|
| Yes | Eligibility Documents | Attachment | | more storage | |
| Yes | testmemo | Memo | | testing the size of a custom memo field | |
| Yes | hyperlink | Hyperlink | | testing hyperlink showing as a check box | |
| Yes | MD EVS Site | Hyperlink | | MD EVS website | |
| Yes | Alias\A | TextBox | | Also known as | |
| Yes | Service plan updated | DatePicker | | Service plan updated | |
| Yes | Client Documentation | Attachment | | Attachments | |
| Yes | Trying to attach | Attachment | | attach | |
| Yes | Dietary Needs | ComboBox | | Dietary Needs | |
| Yes | Dentist | ComboBox | | Dentist who provided services | |
| Yes | Laundry List | Memo | | Default | |

Now that custom field is included as an option for searching for clients in Find Client.



Find Client

Client Search Close

Find Client

Last Name:

First Name:

Preferred Name:

DOB:

ClientID:

URNorEURN:

Encrypted UCI:

Active Only:

C&T/Primary Care:

Allergies_Cm:

Belt size:

Dietary Needs: