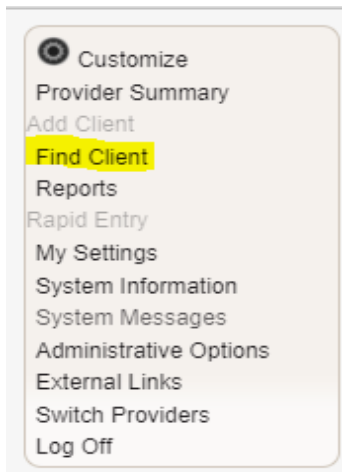
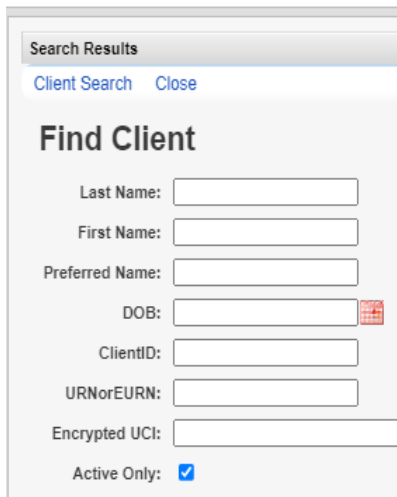


To search for clients in CAREWare, follow these instructions:

1. Click *Find Client*.

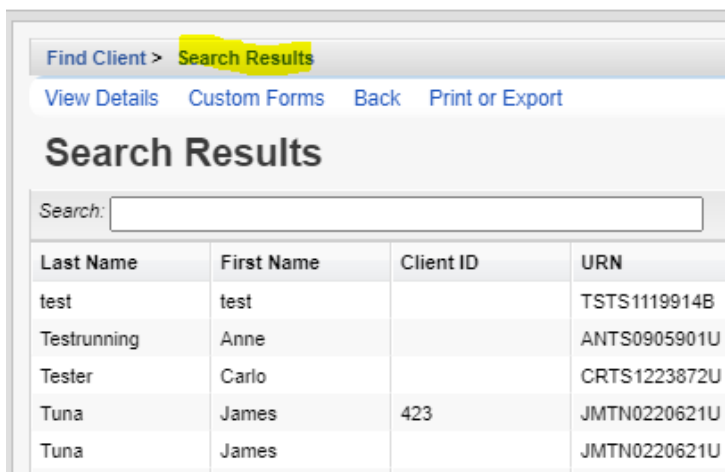


2. Enter at least one search term.



A screenshot of the 'Find Client' search form. The form has the following fields: Last Name, First Name, Preferred Name, DOB (with a calendar icon), ClientID, URNorEURN, and Encrypted UCI. There is also a checkbox for 'Active Only' which is checked.

3. Click *Client Search*.



A screenshot of the 'Search Results' page. The page has a breadcrumb trail 'Find Client > Search Results' and navigation links: View Details, Custom Forms, Back, and Print or Export. Below the navigation is a search input field and a table of search results.

Last Name	First Name	Client ID	URN
test	test		TSTS1119914B
Testrunning	Anne		ANTS0905901U
Tester	Carlo		CRTS1223872U
Tuna	James	423	JMTN0220621U
Tuna	James		JMTN0220621U

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*.

Variable Name	Value	Can Update
ActiveClientsOnlyDefaultValue	1	EDITABLE IN LIST
UseHUDValsForHousing	0	Requires restart

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*.

Active Only:

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 C
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: 