Find Client: Folder

The “Find Client” menu option in the “Client Workspace” allows users to search for any existing client in the HMIS system. Understanding how to search for a client is extremely important because it is the best way to prevent creating multiple records, also known as duplicates, of individual clients.

Best Practices to Search for Clients in HMIS

**For instructions on the mechanics of how to perform a Find Client search, see Chapter 2: Navigating in ClientTrack/Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Client Using “Find Client” *in the* “HMIS Basic User 2025 Manual”.

When searching for a client in ClientTrack/HMIS, follow these simple guidelines to prevent creating multiple records.

Step 1: Cast a wider net than needed. When starting a search, it is better for you to get too many records returned rather than too few. You can always look at the list of potential matches and select the correct record.

- Start by entering the first 2 letters of the client’s first and last. This will ensure that if a record already exists for this client with the name slightly misspelled, the search will return that record.

Step 2: Use all available information available. Any personal identifiable information such as a social security number, a birthday, etc., may be useful information to search for or verify a client’s identity. Search multiple times using different information.

- A client may have had an existing profile in HMIS that has incorrect information such as a misspelled name or incorrect social. Therefore, step 2 can help compliment the search process that started with Step 1. Searching in multiple scenarios, for example, entering simply a first letter of a first and last name, a birthday, and a partial social may locate a previously entered client’s incorrect data. Next, for example, enter the first two letters, no birthday, and a couple of different social digits.

- The effectiveness of a search increases with logical and strategic search criteria. Once an effective search strategy is obtained, searching for and preventing multiple client records is effective and sustainable.

Step 3: Verify information. If a potential record has been found, make sure that other data matches. If any doubt exists, such as missing or inconsistent information, reach out to a supervisor and/or email hmis@changinghomelessness.org to gain assistance on verifying a client's profile.

- HMIS records are confidential as outlined by the rules and regulations. Therefore, if a potential record shows, for example, the client has a daughter, avoid saying, "Do you have a daughter named -------- ?". Instead, ask an open-ended question such as, "Have you had any family or friends associated with you that may already be in our HMIS system?"

Search for Clients Using "Find Client"

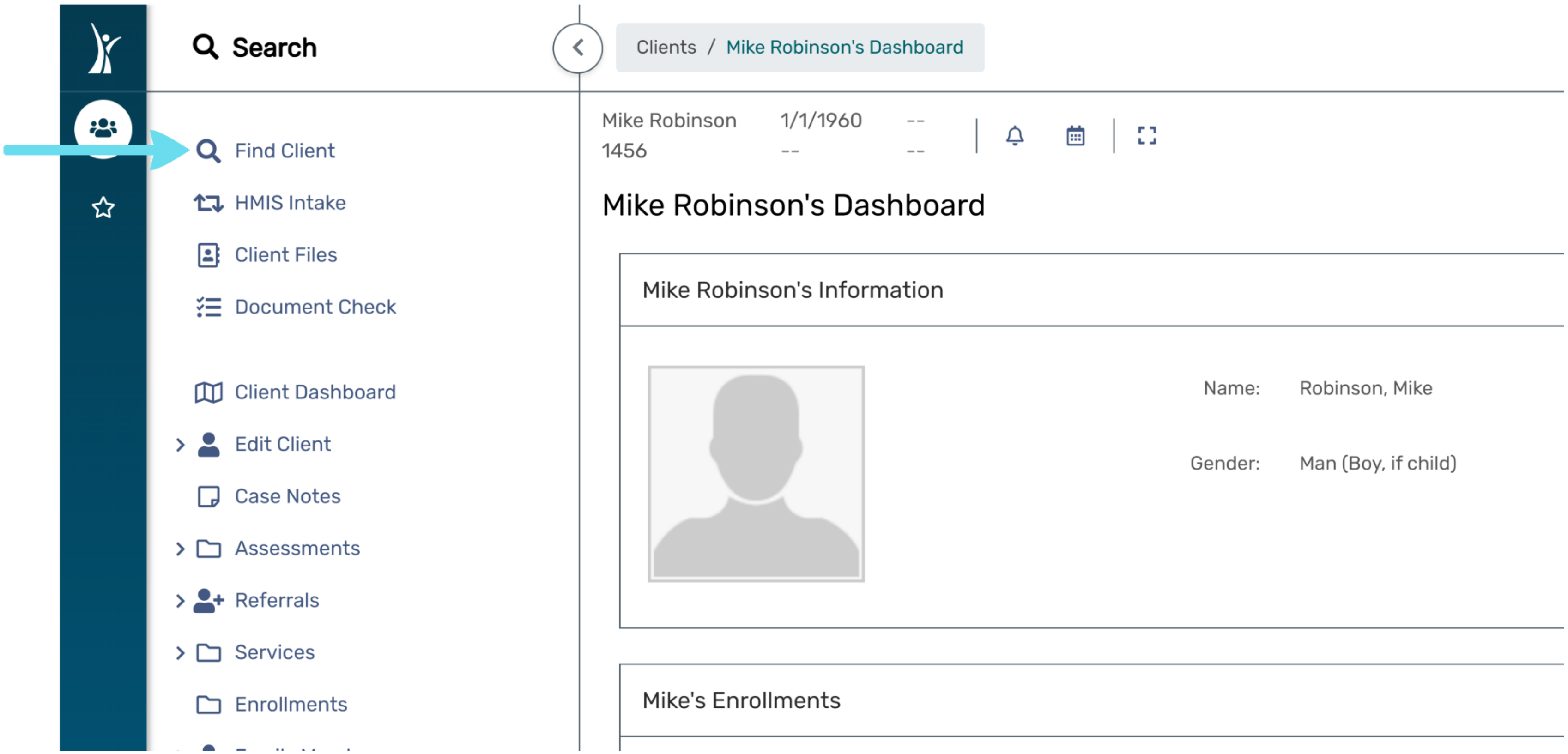
Steps to Navigate to the "Find Client" Folder Menu

Step 1: Navigate to the Client Workspace.

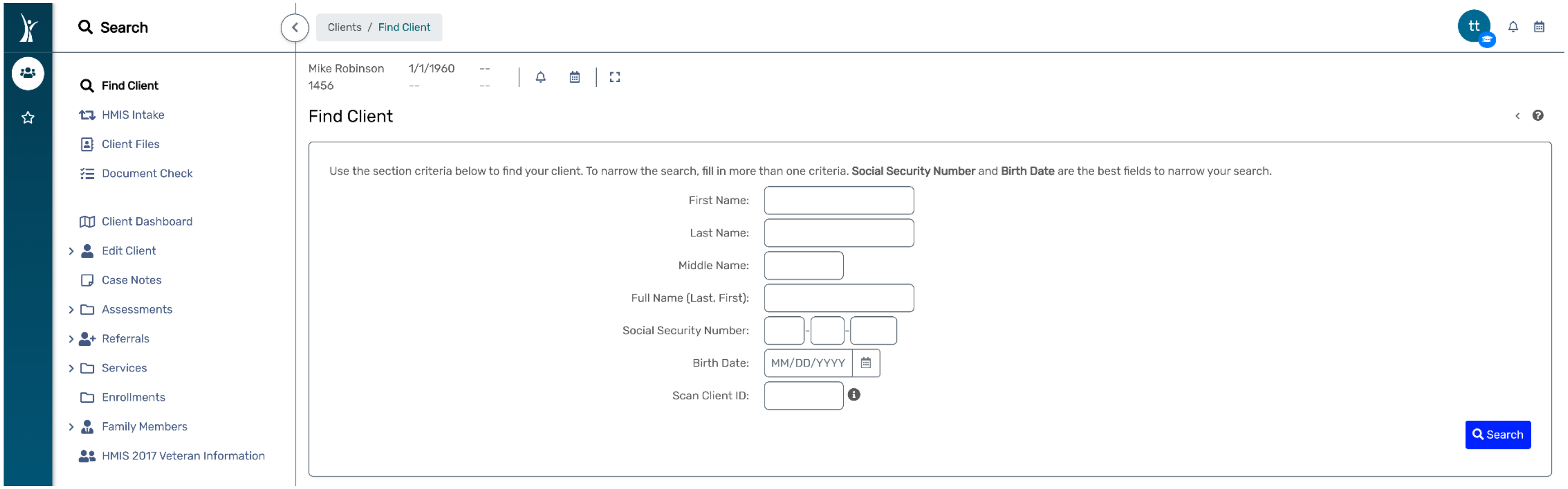
**To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* "HMIS Basic User 2025 Manual".

Step 2: Select the "Find Client" secondary sidebar* menu option. ClientTrack will navigate to the "Find Client" workspace container.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/*General Page Anatomy and Page Terminology in *the* "HMIS Basic User 2025 Manual".


Search
Clients / Mike Robinson's Dashboard
Find Client
HMIS Intake
Client Files
Document Check
Client Dashboard
Edit Client
Case Notes
Assessments
Referrals
Services
Enrollments
Mike Robinson
1456
1/1/1960
Mike Robinson's Dashboard
Mike Robinson's Information
Name: Robinson, Mike
Gender: Man (Boy, if child)
Mike's Enrollments

Find Client



Find Client Form

Tips and Tricks - *HMIS Intake Workflows and Find Client - Preventing Multiple (Duplicate) Client Entries*

- Use "Find Client" to search for clients into HMIS before starting an "Intake" workflow.

- To utilize the full potential of "Find Client"*, start with less information and build up to attempt to find a client and/or any potential duplicate clients.

**For instructions on best practices for using the "Find Client" folder, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Best Practices to Search for Clients in HMIS.

- An example is to use the first two letters of the client's first, last name, and/or a partial social security number.

- A dynamic search has the added benefit of potentially finding clients that have had information, such as a mispelled name or incorrect social security # instead of creating an accidental additional profile.

Tips and Tricks - *HMIS Intake Workflows and Find Client - Preventing Multiple (Duplicate) Client Entries*

A partial entry can yeild different results depending on the dynamics of the search.

Example #1

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Social Security Number: - 37 -

Birth Date: MM/DD/YYYY

Scan Client ID:

Search

1 result found.

First Name	Last Name	Middle Name	SSN	Birth Date
Tom	Cruise		456-37-5685	08/18/1987

Example #2

Social Security Number: - - 37

Birth Date: MM/DD/YYYY

Scan Client ID:

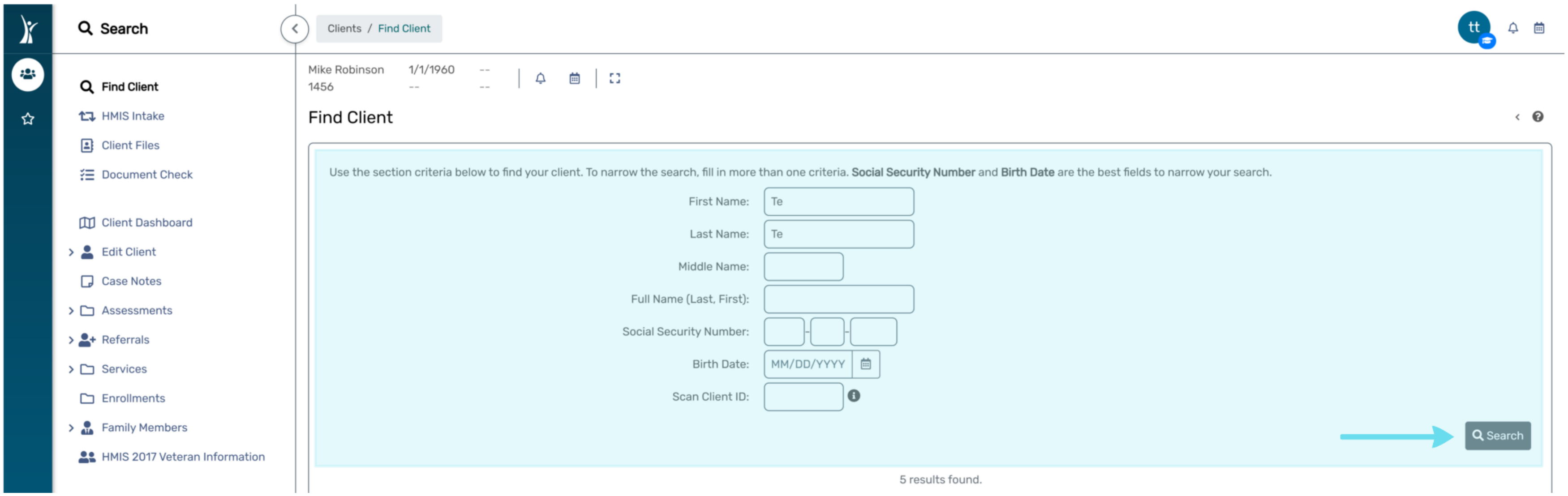
Search

2 results found.

First Name	Last Name	Middle Name	SSN	Birth Date
Daisy	Lane		235-46-3745	01/01/1960
Rebecca	Howard		266-79-3711	10/04/1962

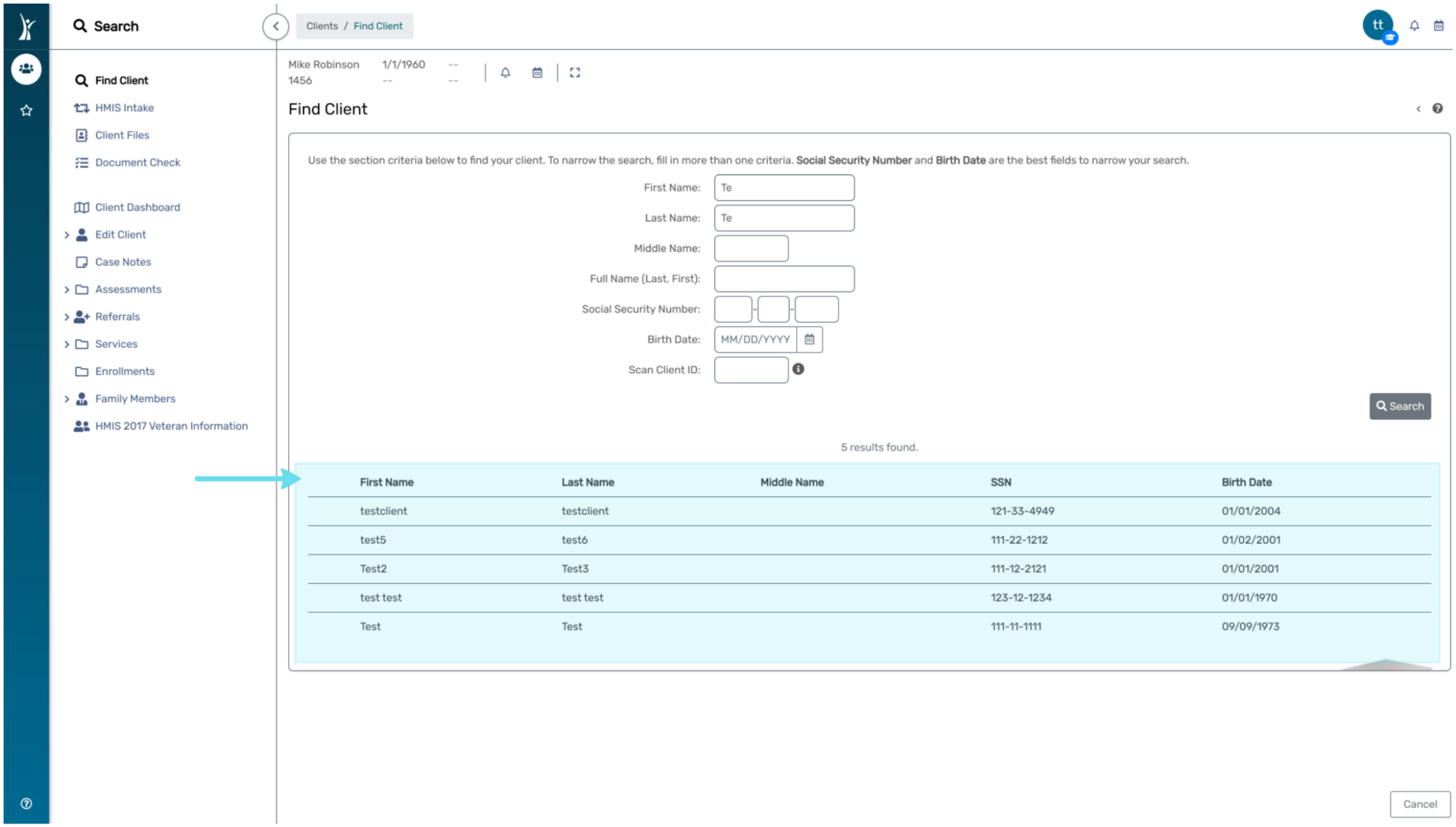
<u>Steps to execute a search in the "Find Client" Folder Menu</u>

Step 1: Enter information in the search criteria, click the "Search" button at the bottom right of the workspace container.



Find Client Form

Step 2: The system will perform the search and return all clients that fit the search criteria. Look through the list of client records that return from using the search criteria in Step 4. Select the correct client record by clicking on the row with the client's name. ClientTrack will navigate to the Client Dashboard: Folder.



Find Client Search Results

If there are duplicate records, please send an email to HMIS@changinghomelessness.org or submit a ticket through ClientTrack's Help Center. When reporting duplicate records, in the note section, confirm which record should be kept using the client ID.