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.

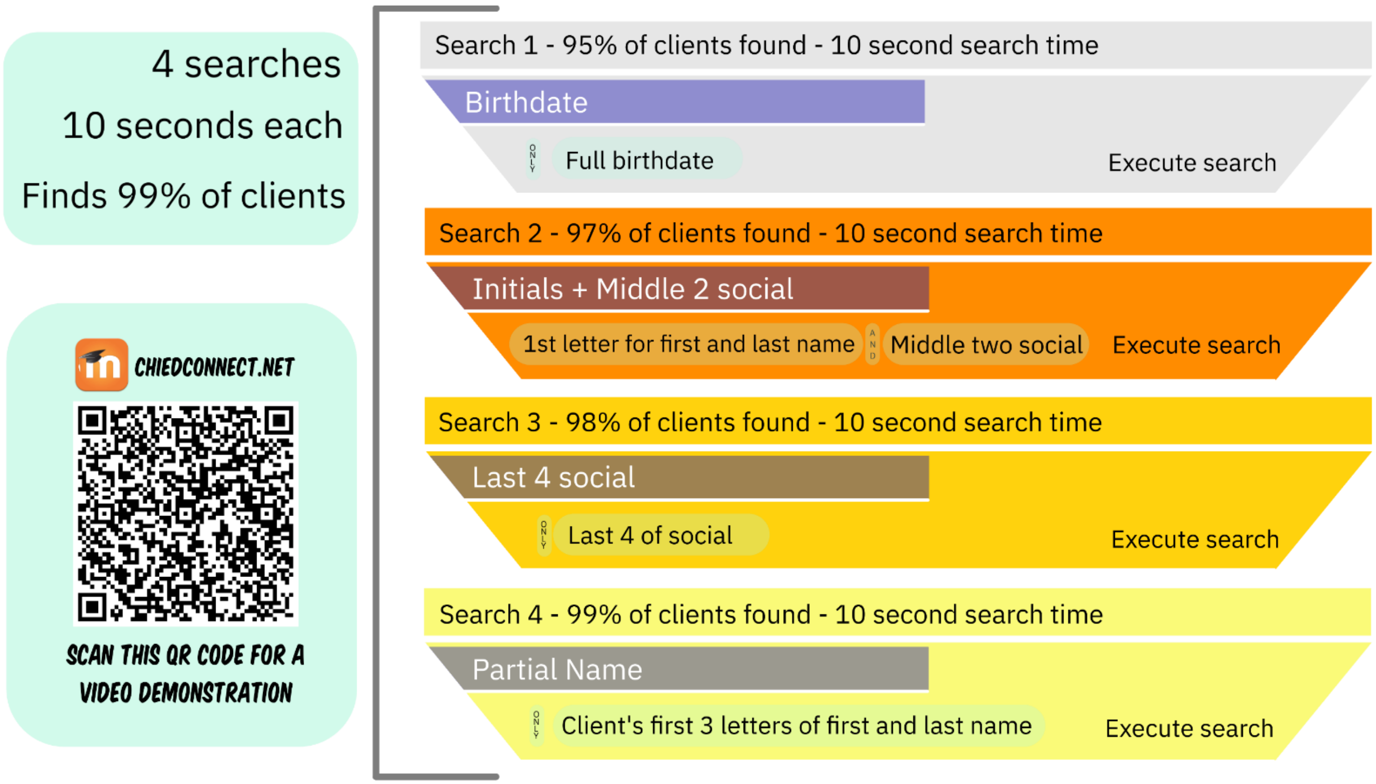
Best Practices to Search for Clients in HMIS

**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.

<u>Use the “4 Search” method</u>

The “4 Search” method is 4 systematic searches executed in succession to quickly find 99% of clients in ClientTrack. Performing these 4 searches for each client entered in the system takes an average of 40 seconds total to complete and ensure accurate search results.



Step 1: Search via "birthdate". 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.

- The birthday alone retrieves an average return of 1-7 results. If there are any other errors in the name, getting a manageable list of 1-7 clients without using the name is efficient.
  - What does this search accomplish? Birthdays are recorded at a 97% rate in ClientTrack. A birthday can retrieve results where names are incorrect and/or social security numbers are incorrect or missing.
  - Incorrectly recorded or uncollected birthdates require other searches to be performed to ensure client identification.

Step 2: Search using initials of the first and last name and 2 middle numbers of SS#.

- A first and last initial with 2 middle SS# digits retrieves a median return of 4-10 results. If there are any other errors in the social, birthdate, or name, getting a manageable list of 4-10 clients is efficient.
  - What does this search accomplish? Socials are the best identifier for an individual, but the second most likely to contain errors after a client's name. To start with first initials and the middle 2 of the SS#, you're extremely likely to find a preexisting client within a reasonable search return.

Step 3: Search using the last 4 digits of social security number.

- The last 4 digits of the social security # alone retrieves a manageable median return of 7-14 results. If there are any other errors in the name or birthdate, getting a manageable list of 7-14 clients without using the name is efficient.
  - What does this search accomplish? Names are the most likely to be incorrect. First letters of names are less likely to be incorrect, but eliminating the name field can find a client that may have an incorrect first letter such as "Chris" and "Kris". Also, searching the last 4 of the social narrows the search and offsets if there were errors in the birthday, first initials, and middle 2 digits of SS#s as performed in steps 1 and 2.

Step 4: Search using the client's first 3 letters of their first name and first 3 letters of their last name.

- The first 3 letters of a first and last name alone retrieves a manageable median return of 6-15 results. If there are any other errors in a SS# or birthdate, getting a manageable list of 6-15 clients is efficient.
  - What does this accomplish? Eliminating the social security field and birthdate can find a client that may have an incorrect social security number and wasn't detected in the first 3 searches.

Search for Clients Using "Find Client"

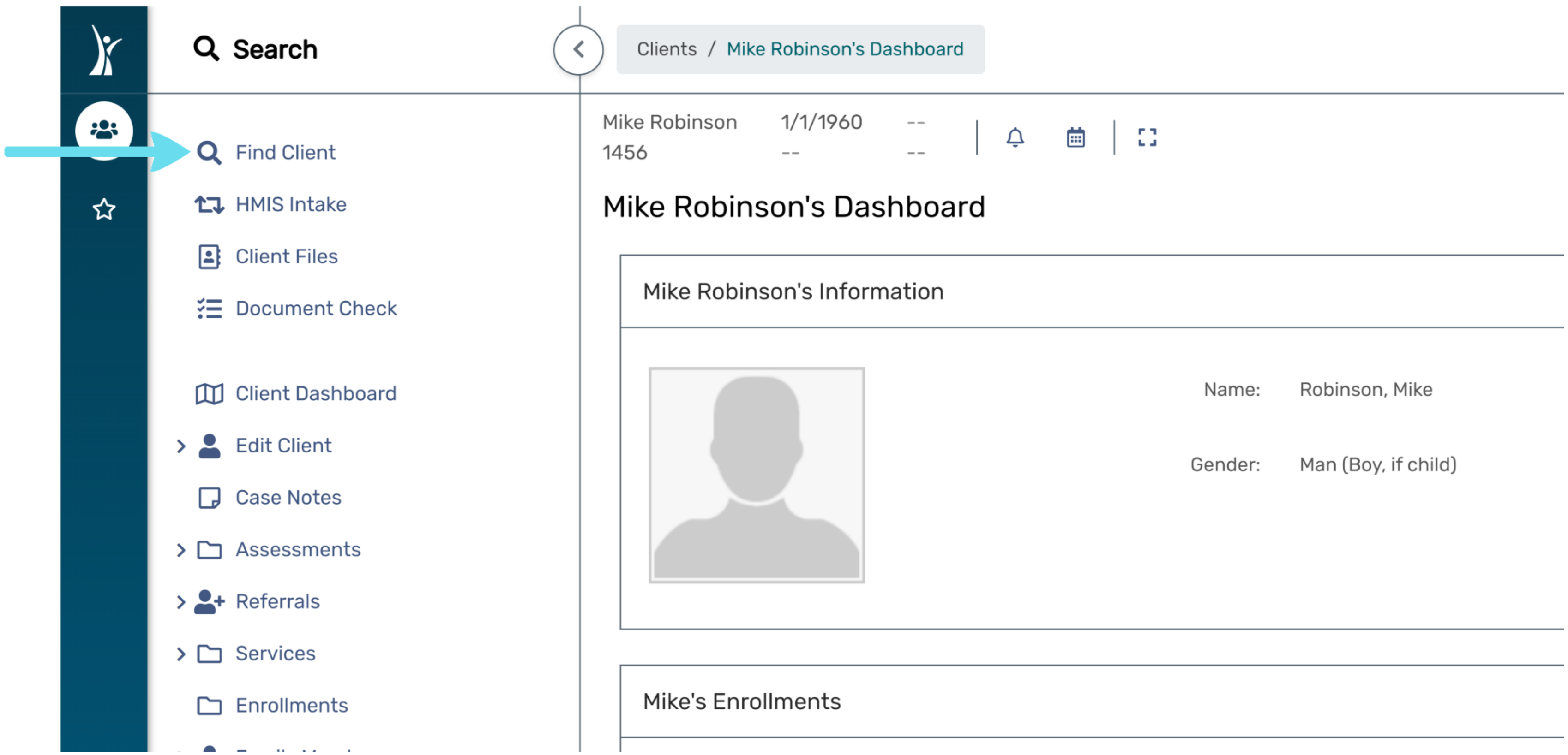
<u>Steps to Navigate to the "Find Client" Folder Menu</u>

Step 1: Navigate to the Client Workspace.

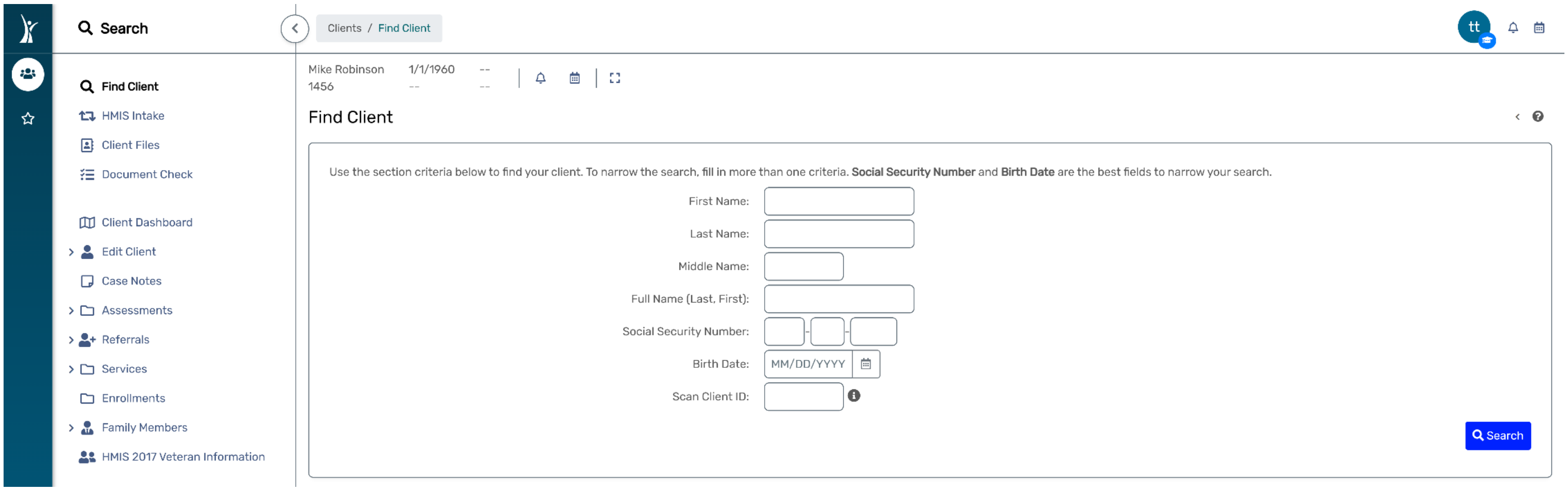
**To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* “HMIS Basic User 2025 Manual”.

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”.



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:

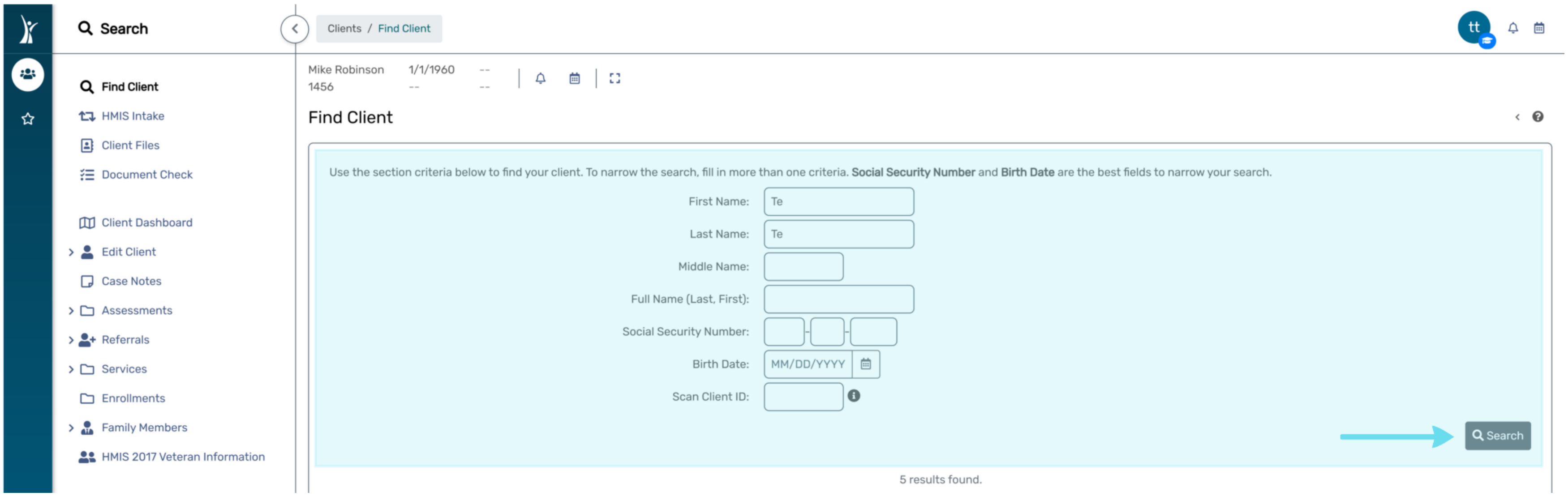
Search

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

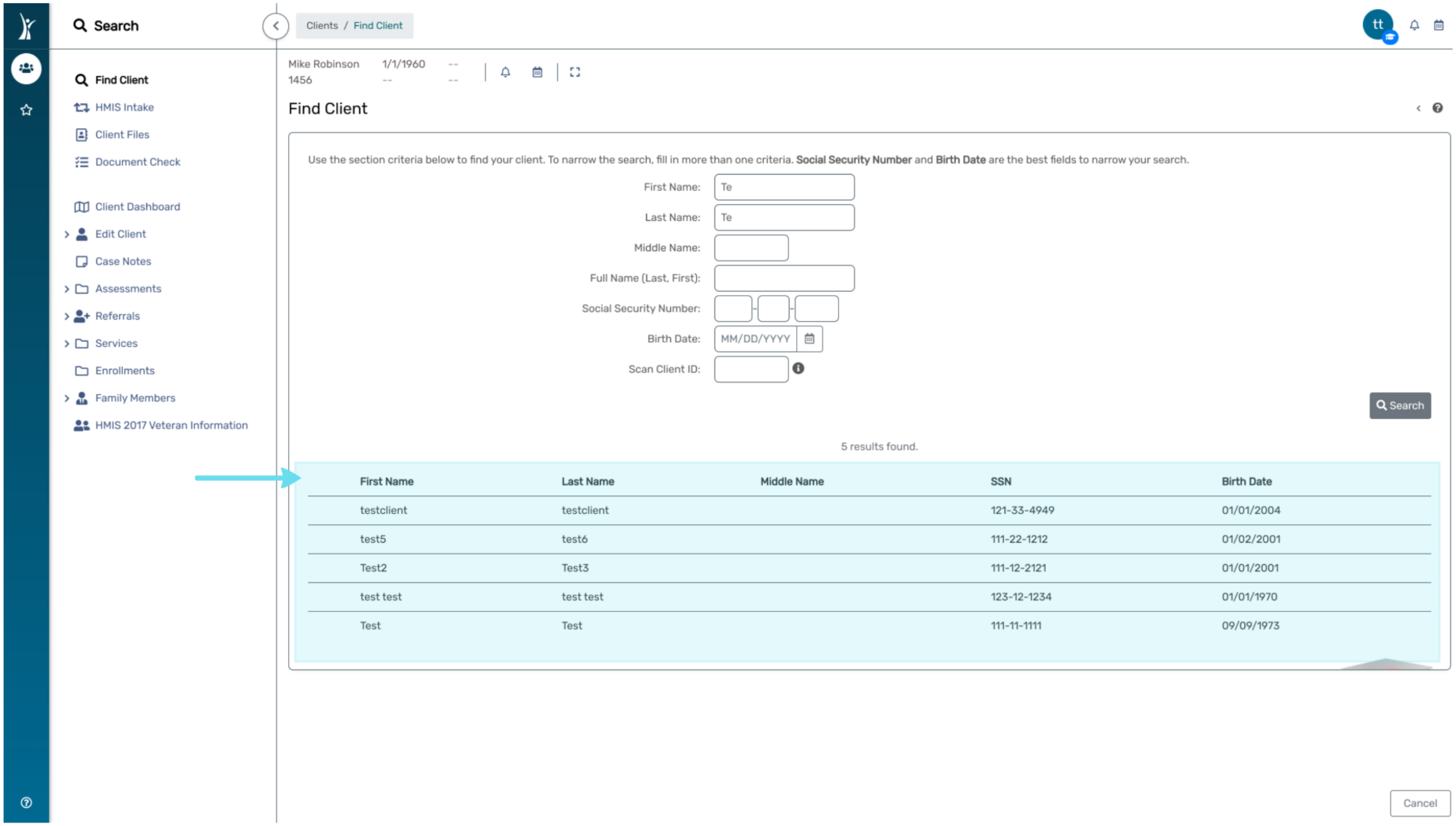
<u>**Steps to execute a search in the "Find Client" Folder Menu**</u>

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.