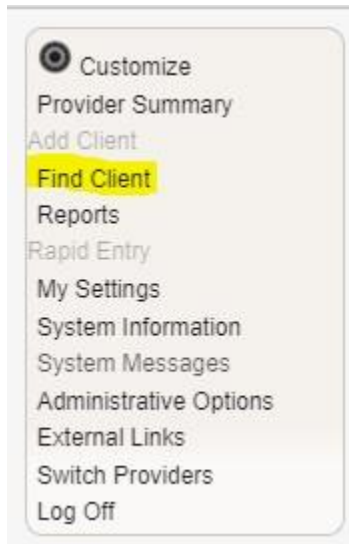


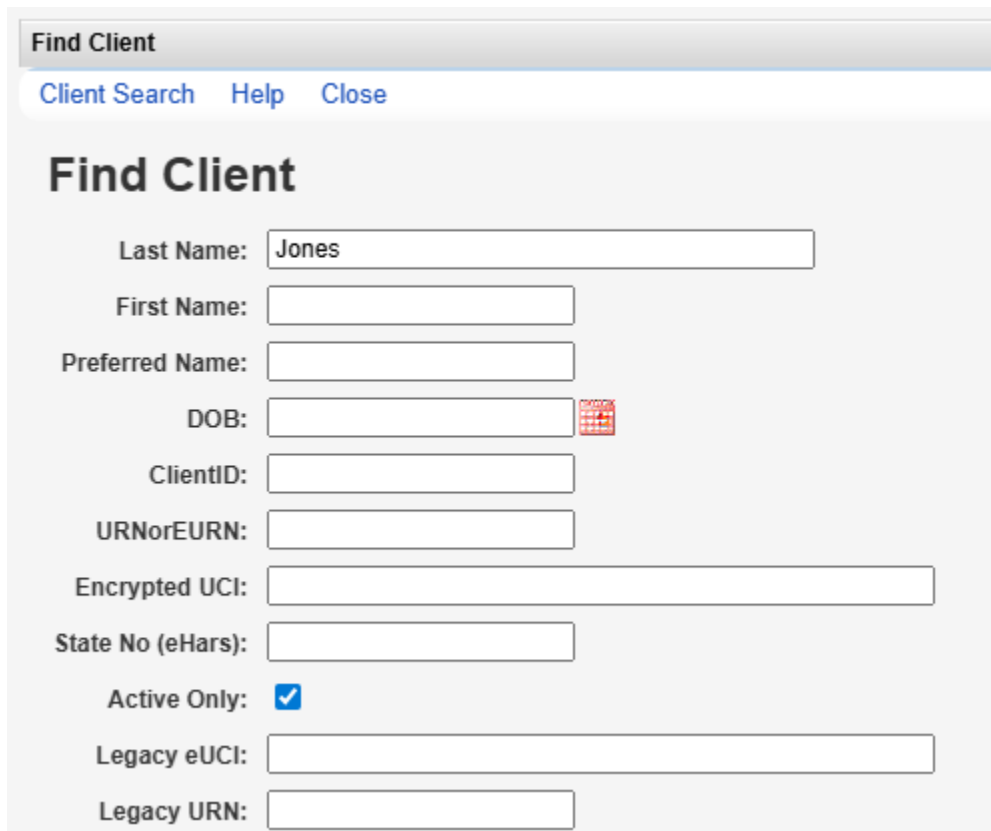
Find Client

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 in CAREWare. The form has a title bar 'Find Client' with buttons for 'Client Search', 'Help', and 'Close'. Below the title bar, the form is titled 'Find Client' and contains several input fields: 'Last Name:' with the value 'Jones', 'First Name:', 'Preferred Name:', 'DOB:' with a calendar icon, 'ClientID:', 'URNorEURN:', 'Encrypted UCI:', 'State No (eHars):', 'Active Only:' with a checked checkbox, 'Legacy eUCI:', and 'Legacy URN:'.

3. Click *Client Search*.

Find Client

[Client Search](#) [Help](#) [Close](#)

Find Client

Last Name:

First Name:

Preferred Name:

DOB: 

ClientID:

URNorEURN:

Encrypted UCI:

State No (eHars):

Active Only: ☒

Legacy eUCI:

Legacy URN:

4. Click a client.

Find Client > Search Results

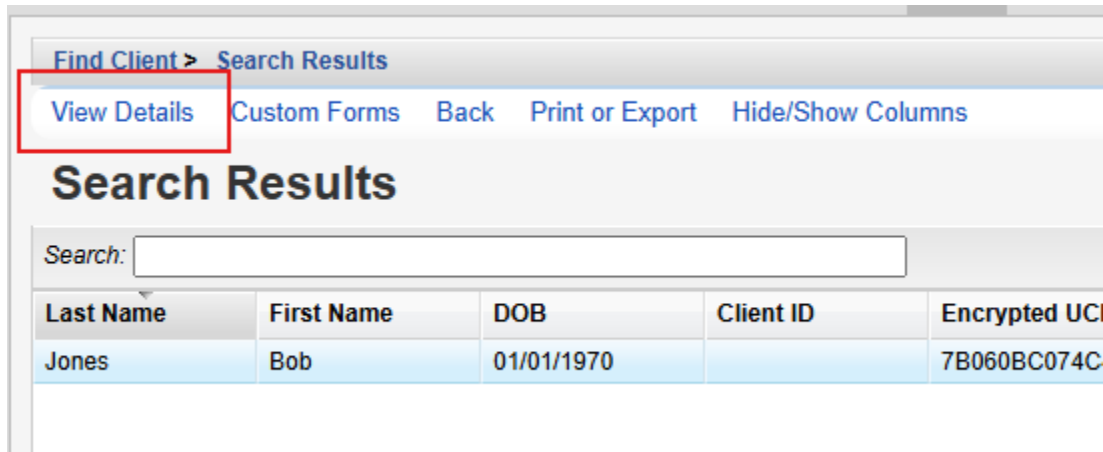
[View Details](#) [Custom Forms](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

Search Results

Search:

Last Name	First Name	DOB	Client ID	Encrypted UCI
Jones	Bob	01/01/1970		7B060BC074C

5. Click *View Details*.



Find Client > Search Results

[View Details](#) [Custom Forms](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

Search Results

Search:

Last Name	First Name	DOB	Client ID	Encrypted UCI
Jones	Bob	01/01/1970		7B060BC074C

View Details: Open the record for the selected client.

Custom Forms: Quick link to open Custom Forms tab in the selected client record.

Back: Return to the client search screen.

Print or Export: Print or export the list of client results for the search.

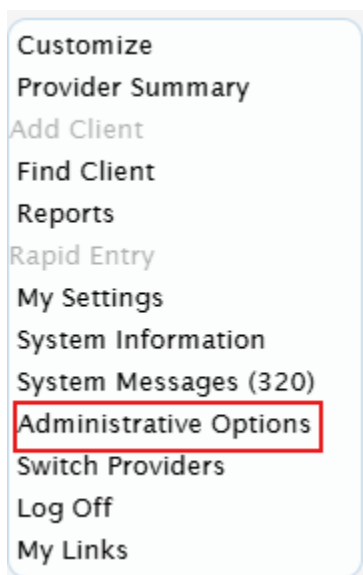
Hide/Show Columns: Hide or show columns in the Search Results.

Active Only Setting

By default, search results are limited to active clients only based on enrollment status in the client record. If the search results need to include active and inactive clients, uncheck the box for active only. Active clients are clients without 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.

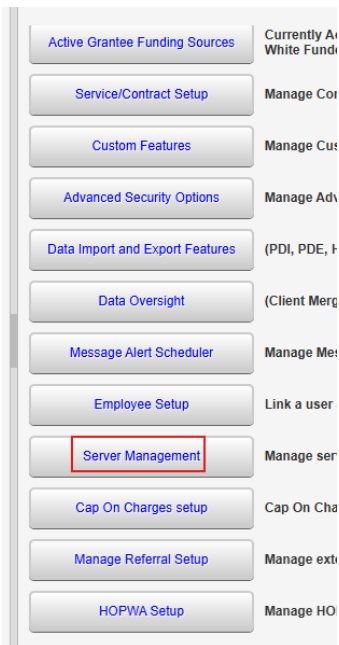
The default setting can be adjusted in the *Common Storage Settings* in Central Administration.

1. Log into Central Administration.
2. Click *Administrative Options*.

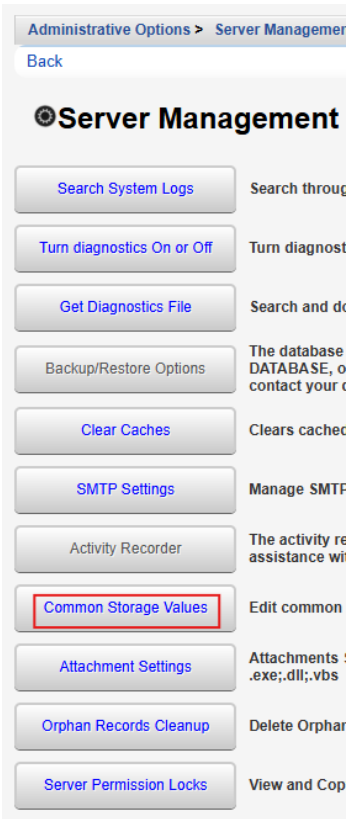


- Customize
- Provider Summary
- Add Client
- Find Client
- Reports
- Rapid Entry
- My Settings
- System Information
- System Messages (320)
- Administrative Options**
- Switch Providers
- Log Off
- My Links

3. Click *Server Management*.



4. Click *Common Storage Values*.



5. Type *Active* in the search field.

Administrative Options > Server Management > Common Storage Values

[View](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

Common Storage Values

Search:

Variable Name	Value
ActiveClientsOnlyDefaultValue	1
EnforceNDCActiveDate	1
UseHUDValsForHousing	0

6. Click *ActiveClientsOnlyDefaultValue*.

Administrative Options > Server Management > Common Storage Values

[View](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

Common Storage Values

Search:

Variable Name	Value
ActiveClientsOnlyDefaultValue	1
EnforceNDCActiveDate	1
UseHUDValsForHousing	0

7. Click *View*.

Administrative Options > Server Management > Common Storage Values

[View](#) [Back](#) [Print or Export](#) [Hide/Show Columns](#)

Common Storage Values

Search:

Variable Name	Value
ActiveClientsOnlyDefaultValue	1
EnforceNDCActiveDate	1
UseHUDValsForHousing	0

8. Click *Edit*.

Administrative Options > Server Management > Common Storage Values

Edit Back

Common Storage Values

Variable Name: ActiveClientsOnlyDefaultValue

Value(StringValue): 1

Can Update: EDITABLE IN LIST

Description: Sets default value for 'Active Clients Only' option in

9. Change the Value(StringValue) to 0.

Save Cancel

Common Storage Values

Variable Name: ActiveClientsOnlyDefaultValue

Value(StringValue): 0

Can Update: EDITABLE IN LIST

Description: Sets default value for 'Active Clients Only' option in client search

10. Click *Save*.

Save Cancel

Common Storage Values

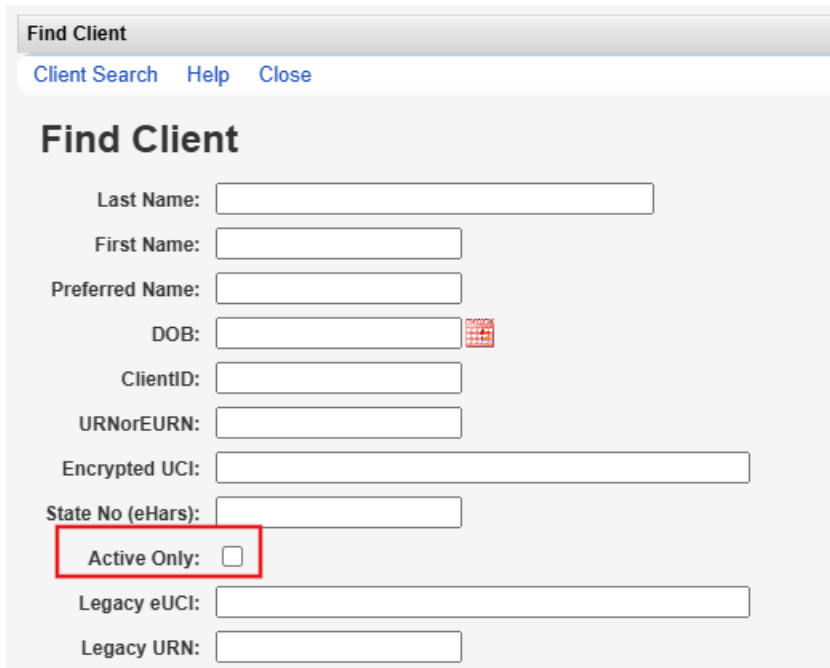
Variable Name: ActiveClientsOnlyDefaultValue

Value(StringValue): 0

Can Update: EDITABLE IN LIST

Description: Sets default value for 'Active Clients Only' option in client search

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

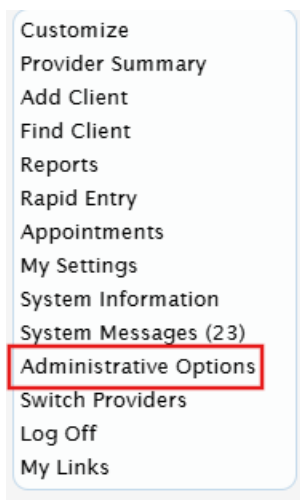
A screenshot of the 'Find Client' form. The form has a title bar 'Find Client' with buttons 'Client Search', 'Help', and 'Close'. Below the title bar, the form is titled 'Find Client'. It contains several input fields: 'Last Name:', 'First Name:', 'Preferred Name:', 'DOB:', 'ClientID:', 'URNorEURN:', 'Encrypted UCI:', 'State No (eHars):', 'Legacy eUCI:', and 'Legacy URN:'. A red box highlights the 'Active Only:' checkbox, which is currently unchecked. There is also a small red icon next to the 'DOB:' field.

Users will need to check the box to limit the search results to only active clients.

Searching by Custom Fields

Custom fields can be added to the Find Client screen.

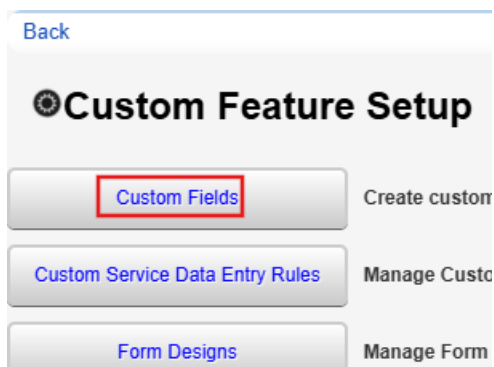
1. Click *Administrative Options*.



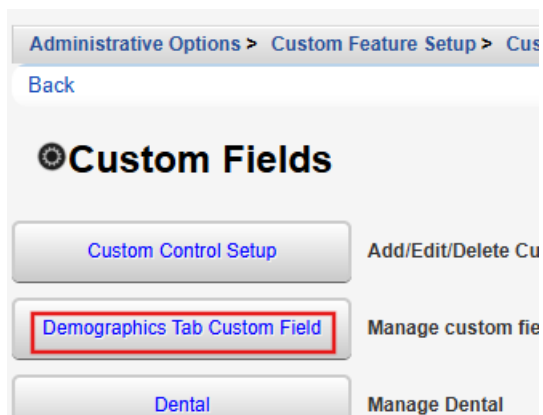
2. Click *Custom Features*.



3. Click *Custom Fields*.



4. Click *Demographics Tab Custom Field*, one of the Custom Tabs, or Central Custom Tab.



- Click an active custom field to highlight it.

Activate	Deactivate	Move Up	Move Down	Toggle Search	Toggle Rapid Entry	Toggle Client Add	Toggle Duplicate Warning	Back	Print or Export	Hide/Show Columns
Custom Demographics Control Activation										
Search:										
Active	Name	Control Type	Search By	Description	Show On Rapid Se	Include on Add Cli	Warn about dupl			
Yes	HMAP ID	TextBox	Yes	HMAP ID						
Yes	Client Documentation	Attachment		Attachments						
Yes	Ash's Custom Field	TextBox		This is a custom field for Ash. We						

Activate: Activate (i.e., add) the custom field in the selected tab.

Deactivate: Deactivate (i.e., remove) the custom field from the selected tab.

Move Up: Move the custom field up in the list. This also affects the order of the custom fields in the client record.

Move Down: Move the custom field down in the list. This also affects the order of the custom fields in the client record.

Toggle Search: Show or hide the custom field on the Find Client screen.

Toggle Rapid Entry: Show or hide the custom field in the Rapid Entry screen.

Toggle Client Add: Show or hide the custom field in the Add Client screen.

Toggle Duplicate Warning: Turn Duplicate Warning on or off for the custom field.

Back: Return to the Custom Fields menu.

Print or Export: Print or export the list of custom fields for the tab.

Hide/Show Columns: Hide or show columns in the list of custom fields.

- Click Toggle Search.

Activate	Deactivate	Move Up	Move Down	Toggle Search	Toggle Rapid Entry	Toggle Client Add	Toggle Duplicate Warning	Back	Print or Export	Hide/Show Columns
Custom Demographics Control Activation										
Search:										
Active	Name	Control Type	Search By	Description	Show On Rapid Se	Include on Add Cli	Warn about dupl			
Yes	HMAP ID	TextBox	Yes	HMAP ID						
Yes	Client Documentation	Attachment		Attachments						
Yes	Ash's Custom Field	TextBox		This is a custom field for Ash. We						

The custom field is included as an option in the Find Client screen.

Find Client

[Client Search](#)
[Help](#)
[Close](#)

Find Client

Unlock 1Password

Last Name:

First Name:

Preferred Name:

DOB:

ClientID:

URNorEURN:

Encrypted UCI:

State No (eHars):

Active Only: ☒

Legacy eUCI:

Legacy URN:

HMAP ID: