

Find Client



Purpose	Search for an existing client and open the client record.
Who should do this	CAREWare users who need to locate and review client records.
Use this guide when you need to	Find a client in CAREWare.
Main warning	Verify the selected client before opening the record, especially when multiple clients have similar names.

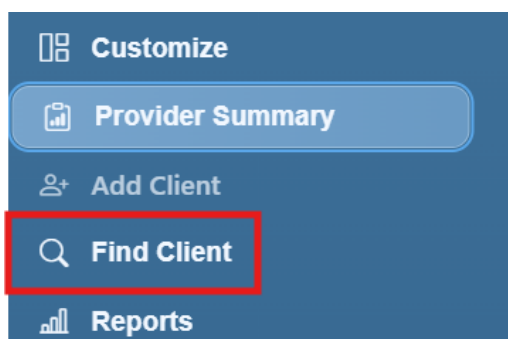
Quick path
Provider menu > Find Client > enter a search term > Client Search > select client > View Details

Before you begin

- Confirm that you are working in the correct provider domain.
- Have at least one search term available, such as last name, first name, date of birth, or client ID.

Find and open a client record

Step 1. Click Find Client in the provider menu.



Step 2. Enter at least one search term.

Find Client

Last Name:

First Name:

Preferred Name:

DOB:

mm/dd/yyyy

ClientID:

URNorEURN:

Encrypted UCI:

State No (eHars):

Active Only:

☒

Legacy eUCI:

Legacy URN:

Step 3. Click Client Search.

Client Search

Help

Close

Find Client

Last Name:

First Name:

Preferred Name:

Step 4. Select the correct client from the search results and click View Details.

View Details

Custom Forms

Back

Print or Export

Column visibility

Copy

Search Results

Search:

<<

<

1

>

>>

Go to page

1

 100 entries per page Show

Last Name	First Name	DOB	Client ID	URN
abcdefg	gfedcba	01/18/1964	12-31-9984	GEAC0118649U
Aerosmith	John	06/01/2023		JHAR0601239U

The client record opens. If you click Custom Forms instead, CAREWare opens the client record at the [Custom Forms](#) window.

Active Only search behavior

Find Client searches are limited to active clients by default. Clear Active Only when the search should include clients with a case closed date.

Important: Active clients are clients without a case closed date. An enrollment status other than active does not by itself exclude a record from Active Only results.

Change the Active Only default

Administrators can change the system default so Active Only is cleared when users open Find Client.

- Step 1.** Log into Central Administration.
- Step 2.** Click Administrative Options.
- Step 3.** Click Server Management.
- Step 4.** Click Common Storage Values.
- Step 5.** Type Active in the search field.
- Step 6.** Select ActiveClientsOnlyDefaultValue.
- Step 7.** Click View.
- Step 8.** Click Edit.
- Step 9.** Change Value (StringValue) to 0.
- Step 10.** Click Save.

Active Only is now cleared by default when users click Find Client.

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

Find Client

Last Name:

First Name:

Preferred Name:

DOB:



ClientID:

URNorEURN:

Encrypted UCI:

State No (eHars):

Active Only:

☐

Add a custom field to Find Client

An active custom field can be made available as an additional Find Client search criterion.

- Step 1.** Click Administrative Options.
- Step 2.** Click Custom Features.
- Step 3.** Click Custom Fields.
- Step 4.** Open Demographics Tab Custom Field, a Custom Tab, or Central Custom Tab.
- Step 5.** Select an active custom field.
- Step 6.** Click Toggle Search.

The custom field is now available as a search option in Find Client.

How to confirm it worked

- The expected client record opens when valid search criteria are used.
- If the Common Storage Settings are changed to have Active Only default to unchecked, the box is unchecked in the Find Client screen.
- If a custom field is toggled for searching, the custom field appears on the Find Client screen.

Troubleshooting and common questions

Why does the client not appear?

Try a different identifier, verify spelling, and clear Active Only if the client may have a case closed date.

Why are so many records returned?

Limit the search results by adding another search term, such as date of birth or client ID, and verify the correct record before opening it.

Why is a custom field missing from Find Client?

Confirm that the field is active and that Toggle Search has been enabled for that field.

Related References

Document	Use it for
Common Storage Values	Manage shared application settings, including the Active Only default.