Another thing I wanted to point out was if you notice these icons that are **next to the client's name, these are flags. I spoke of that are referenced in this client tracking widget.** They're showing me those **individual flags that are outstanding for the client** and they go from **most important to lesser important**. If they're all the same priority, they'll all list, alphabetically. And then I see that there's a **problem list update**. And an **Asam do for this client**.

FRONT DESK: BASIC NAVIGATION

**How To Use The Client Search Screen
(Narrow Search) Client Flags**

HEALTH
AGENCY

COUNTY
of SAN LUIS
OBISPO

Now if I click on that **client icon again**, I want to bring your attention to this **client search**.
Now this **is a comprehensive client search**.

So although I can type the name, part of the name, or the number to search for a client, if I go into this client search, it's actually going to bring up a complete separate window that allows me to do more complex searching and search over different parameters.

Client Search ? ⊠

Clear

Name Search ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search **Narrow Search** Type of Client ● Individual ○ Organization

Last Name [ ] First Name [ ] Program [⌄]

Other Search Strategies

SSN Search	[ ] [ ] [ ]	Phone # Search	[ ]
DOB Search	[ ] 📅 ▾	Master Client ID Search	[ ]
Primary Clinician Search	[⌄]	Client ID Search	[ ]
Authorization ID / #	[ ]	Insured ID Search	[ ]

Records Found

ID	Master ID	Client Name	△ Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician

No data to display

Create New Potential Client **Select** **Cancel**

Registration **Inquiry (Selected Client)** **Inquiry (New Client)**

I can still have that same type in part of the last name, part of a first name, to help find a client. So if I do just like I did in the client search it will find that same client. But now I **can also do a broad search** which is **analogous to a phonetic search**. So if you're not quite sure of a spelling of a name if you enter it, then you have a higher probability of returning a hit, as well as I can search on social security number, date of birth, clients phone number, client ID. Whenever I go down here like we did in the initial search and I enter in their client number because I happen to know that that's going to then result in the same search.

This also has the advantage of it will help prevent the creation of duplicates. If you're actually going in here to create a new client, you'll have to do a broad search for their name, a separate social security search, and then a third date of birth search to ensure that you've really covered the bases to make sure that this individual is unique and isn't already in your system.