To Search for a Client

Updated on August 2016

Home > Client Management (Select Client) >

Business Purpose:

A client search must first be performed using SMIS to determine if the client is an existing client or a new client. You can search by entering either the clients first and last name, Date of Birth, Assigned to or Program. If multiple search criteria are used, then the results be a match to the combination of the search values used.

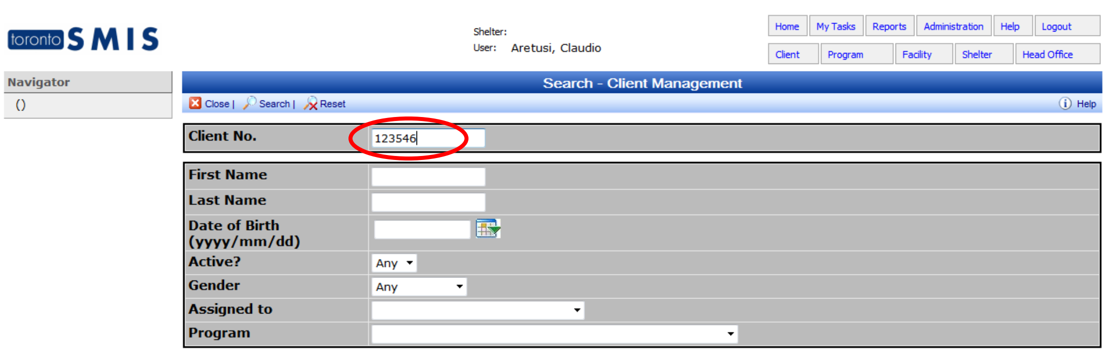
The Search process is to be repeated every time a client enters your shelter.

If **Name** fields are used in the client search, then the search function will check clients first name, last name and alias every time a search is conducted even if you type one of the names into the wrong field. For example, typing the last name Pitt into the **First Name** field will find clients with first name or last name or alias beginning with "Pitt". Also, the search is NOT case-sensitive.

An example of a multiple field search, if you select *Yes* for **Active?** and a particular **Program**, then you will get a list of clients who are currently active/admitted into any shelter in SMIS and are currently intake or have had an intake in the selected Program before.

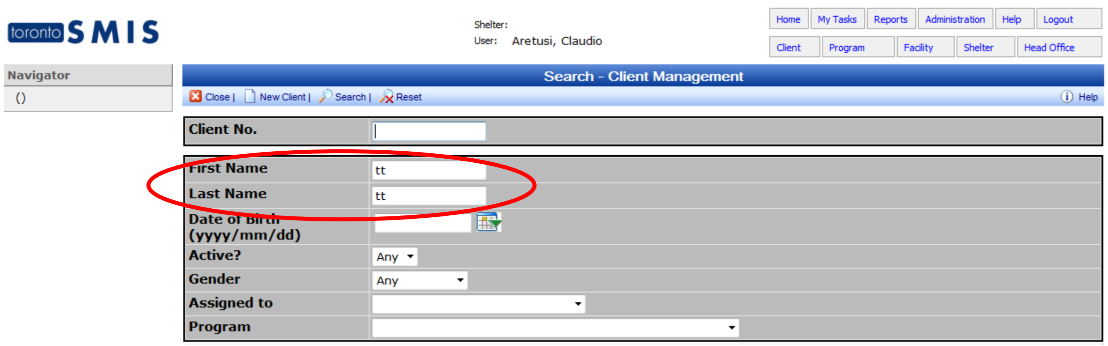
How to:

1. If you know the client's SMIS Client number, then you can enter it into the **Client No.** field and click Search.



Or else,

2. Enter the first two to four characters of the client's name in the **First Name** and **Last Name** fields.



3. Then, click the Search action button. A resulting list of clients that matches the search criteria (if any founded) will then be shown below the above screen.

First Name	Last Name	Gender	Date of Birth	Active	H&S Alert	Client No
Shona	Applewhite	Female	2009/01/01	Yes	No	17131
Omar	Armendariz	Male	1960/01/01	Yes	No	17371
tttt	cccc	Female	1974/01/12	Yes	No	18232
Lorenzo	Edens	Male	2004/01/15	Yes	No	17332
Javier	Halcomb	Male	1953/11/18	Yes	No	15799
iii	iiii	Male	1960/01/18	Yes	No	17971
jane	joe	Female	1961/01/12	Yes	No	17951
joe	joe	Male	1959/01/12	Yes	No	17931
Jimmy	Johnson	Male	1968/01/18	Yes	No	17991
Cameron	Lamont	Male	1975/11/07	No	No	15856 merged to 15799
TTT	TTT	Male	1965/01/12	Yes	No	17672

If no matches are found, then SMIS will return the following message:

No clients found.

Note also that a New Client action button will now appear after a search.

4a. If no clients found or the results list does not contain your client, refine your search criteria to search again, or click on the New Client action button to create a new client.

4b. If your client appears on the results list, then click on either **First Name**, **Last Name** or the **Client No** of your client to advance to the client's summary page.

Other search fields that can be used in combination with the **First Name** and/or **Last Name**, or any other fields below for a more narrowed search are:

5. **Date of Birth** can also be used to refine your client search but must be known exactly.

6. **Active?** can also be used to refine your client search by selecting from the dropdown. You can filter your search by finding *Active*, *Non-active* or *Any* (both) types of Clients. An active client is a client who is currently admitted to a bed program.

7. **Gender** can be used to refine your client search by selecting from the dropdown. You can filter your search by finding *Any*, *Male*, *Female* or *Transgender* clients that matches your other criteria.

8. **Assigned to** can be used to refine your client search by selecting from the dropdown of all staff in your shelter. It will find clients who were assigned upon admission to the selected staff as their primary worker.

9. **Program** can be used to refine your client search by selecting from the dropdown of all programs in your shelter. It will find clients who currently have or in the past have had an active Intake in the selected program.