Client History Screen

Updated on August 2016

Home > Client Management (Search Client) > History

Business Purpose:

The Client Management – History page displays a tabular listing of the client's intake, admission, referral and discharge history for bed programs plus intake and referral history for service programs.

How to:

1. A search can be performed by filtering the client's history records by **Action Date** range which is based the date the action was executed. Users can enter a Start and End date for the date range to be searched.
2. Client's history can also be filtered by the type of **Action** (i.e. Intake, Admin/Bed Assignment, Referral, Discharge).
3. A client history can also be filtered by the **Program** for which the client was active at a point in the past or currently.
4. The user can also choose the number of records to be displayed per page from a dropdown between 20 and 1000 records.
5. For each client history record, the **Action Date**, **Action**, **Reference**, **Program**, **Staff** and U**pdate Date** are displayed.
6. Other than the **Reference** column on the table, each of the column headings are clickable and will execute a sort alternating between ascending and descending based upon the column heading. (For example, when you click on the **Action Date**, the history records are then sorted in ascending order, the oldest first.)

Important Notes:

1. The total number of records is shown at the top and bottom of every page.
2. For Admit/Bed Assignment Action records, the Reference displays the client's Room ID and Bed ID(for singles only), and Primary Worker when updated.
3. For Intake Action records, the Reference displays the **Referred by** field value from the Intake detail screen.

4. For Discharge Action records, the Reference shows the Discharge Reason.

5. For Referral Action records, the Reference shows the Referred by shelter program.