

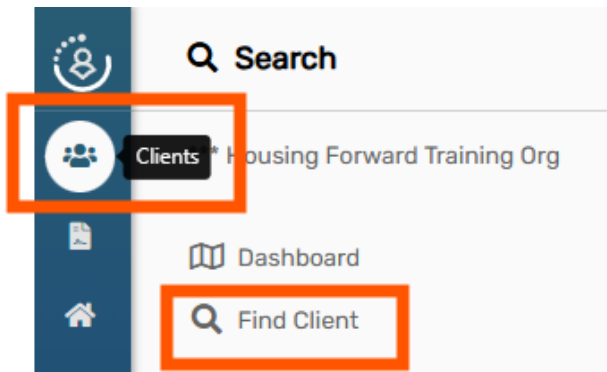
Preventing Duplicate Clients

Introduction

This document will show the steps in creating a client user in HMIS (ClientTrack).

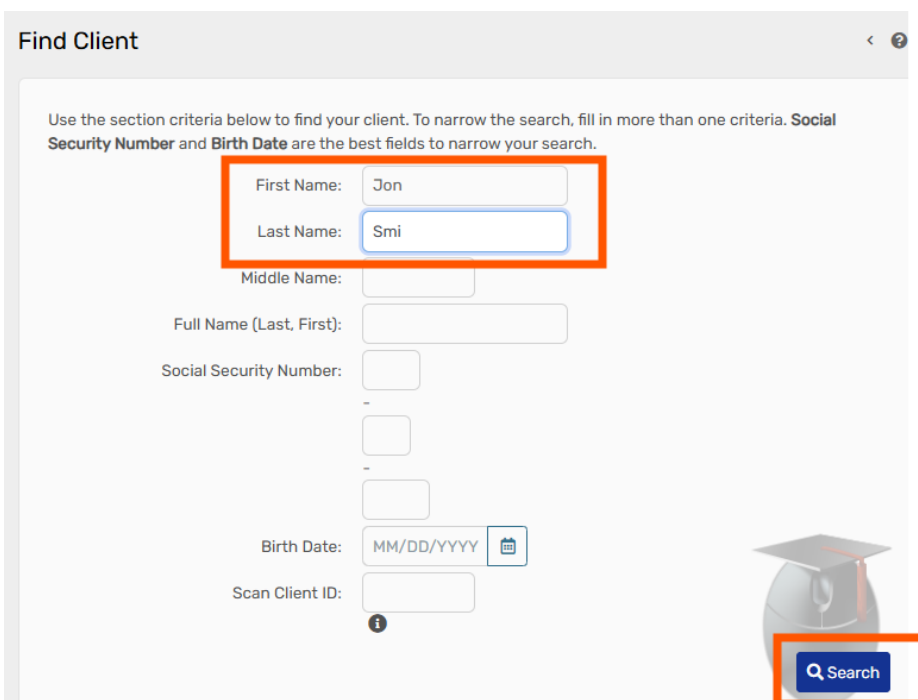
Steps

Search for the Client

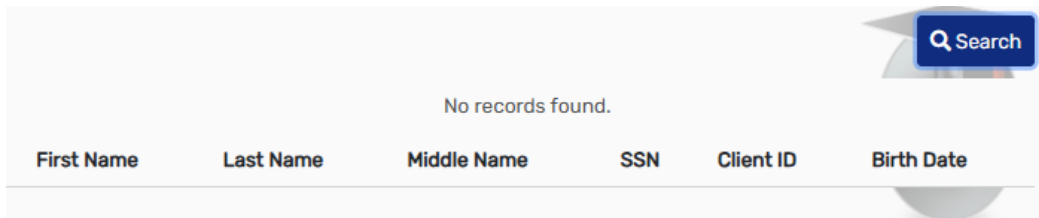


Search by partial name

Enter ONLY the first three letters of the client's first name and the first three letters of the client's last name. This will search the system to see if the client has an existing HMIS record.

A screenshot of the 'Find Client' form in the ClientTrack application. The form is titled 'Find Client' in a gray header bar. Below the title, there is a instruction: 'Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.' The form contains several input fields: 'First Name:' with the value 'Jon', 'Last Name:' with the value 'Smi', 'Middle Name:', 'Full Name (Last, First):', 'Social Security Number:' (with three separate boxes for digits), 'Birth Date:' (with a date picker set to MM/DD/YYYY), and 'Scan Client ID:'. The 'First Name' and 'Last Name' fields are grouped together and highlighted with an orange rectangular box. At the bottom right of the form, there is a blue 'Search' button with a white search icon, which is also highlighted with an orange rectangular box. A graduation cap icon is visible in the bottom right corner of the form area.

If no clients are found with that combination, the system will display “No records found.”



The screenshot shows a search interface with a blue 'Search' button in the top right corner. Below the button, the text 'No records found.' is displayed. Underneath this text is a table header with the following columns: First Name, Last Name, Middle Name, SSN, Client ID, and Birth Date. The table is currently empty of data rows.

If a client isn't found by searching for name, search by birthday or SSN.

Duplicates

If you find duplicates, please submit a Spiceworks ticket by sending an email to help@housingforward.on.spiceworks.com with the both client IDs.

If the client information is not the same, please determine which one is correct and edit the client information to match before submitting the merge of clients.