

FRONT DESK: BASIC NAVIGATION



HEALTH
AGENCY

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

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**.

Client Dashboard

Summary

Name	: Test, Patient	DOB	: 11/09/1988	Age	: 34 Year	Home Address	: 123 Main St Suite 208 Los Angeles, CA 90019
Home Phone	:	E-Mail	:	Primary Clinician	: Robert, Clinician	Primary Physician	: Psychiatrist, Staff
Emergency Contact:		Current Balance	: \$0.00	Last Seen On	: 01/04/2023		

Client Tracking

Agency Registration: 25%

Task	Status	Date
Client Information	Complete	08/28/2022
Verify Coverage	In Progress	09/23/2022
Client Information	In Progress	09/23/2022
Update Problem List	In Progress	10/05/2022

Medications

Name	Instruction	Start	End
Divalproex	125mg, TID, Oral 30 each Morning	11/22/2022	01/20/2023
Lamictal	100mg, Tab, Oral 1 each Morning	11/22/2022	01/20/2023
Xanax	0.5mg, Tab, Oral 30 each As Needed	11/22/2022	12/21/2022
Anafranil	50mg, csa, Oral 1 each Morning	11/29/2022	01/27/2023

Allergies

Allergies	Type
Aspirin	Allergy
milk	Allergy
Milnacipran	Failed Trials
NSAIDS (Non-Steroidal Anti-Inflammatory Drug)	Allergy

Treatment Team

Role	Name
Primary Clinician*	Clinician, Robert
Therapist	Clinician, Robert
Program Assignment Staff: SUD Outpatient*	Clinician, SUD
Care Manager	Rowe, Charla
Psychiatrist	Staff, Psychiatrist
Primary Physician*	Staff, Psychiatrist
Business Office	Stephan, Kristy

Documents To Do(3)

Document	Date	Status
Narrative	2022-12-14	In Progress
Progress Note	2023-01-04	In Progress
CalAIM Assessment	2022-12-29	Co-Sign

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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**.

The screenshot shows the SmartCare interface for a client named 'Test, Patient (1032)'. A red box highlights the 'Client Search' dropdown menu, which is currently open and shows a search result for 'Another, Test (3209) 10/10/1990'. The dashboard includes a summary of the client's information, a treatment team, and a list of tasks to be completed.

Task	Status	Date
Client Information	Complete	08/28/2022
Verify Coverage	In Progress	09/23/2022
Client Information	In Progress	09/23/2022

Role	Name
Primary Clinician*	Clinician, Robert
Therapist	Clinician, Robert
Program Assignment Staff: SUD Outpatient*	Clinician, SUD
Case Manager	Rowe, Charla
Psychiatrist	Staff, Psychiatrist
Primary Physician*	Staff, Psychiatrist
Business Office	Stephan, Kristy

Document Type	Date	Status
Narrative	2022-12-14	In Progress
Progress Note	2023-01-04	In Progress
CAIAM Assessment	2022-12-29	Codsign

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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)

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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.

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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.

Client Search [?] [X]

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)