Search

Training videos - Landing page

The main way to search is on the landing page when you log in.

Search

This searches on both Contacts and Clients. The fields it includes in the search are:

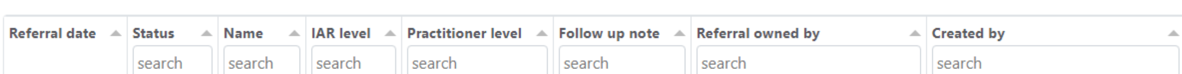
- Contact ID
- Client ID
- First name
- Preferred name
- Family name
- Date of birth
- Phone

*Note that the system **does not** search on Contact records that have been converted to a Client.*

When you see search results, Client records will display with **bold lettering**, and Contact records will display with *italicised lettering*.

Note if you are not in a clinician role (i.e. when you view records, you can't see identifying or sensitive information), then you will only be able to search on Contact ID or Client ID.

Another way to search is when you see lists of records. The screenshot below shows the columns for the **Incomplete Referrals** list. To search a column, click in the box with "search" inside it and then type a search term.



Incomplete Referrals columns

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