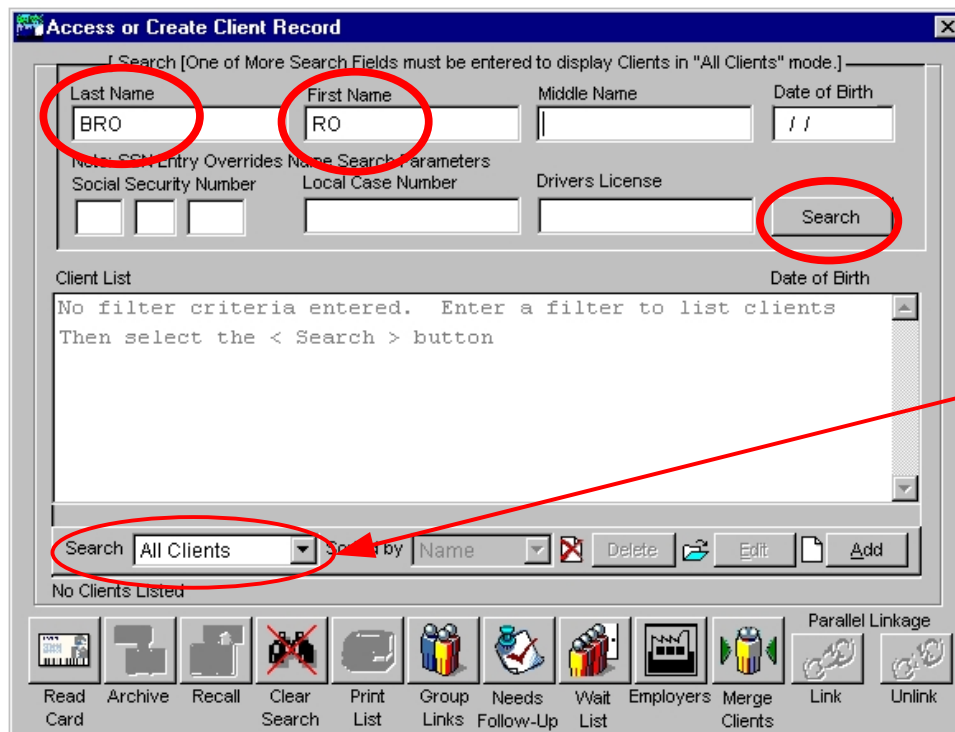


# Searching for a Client

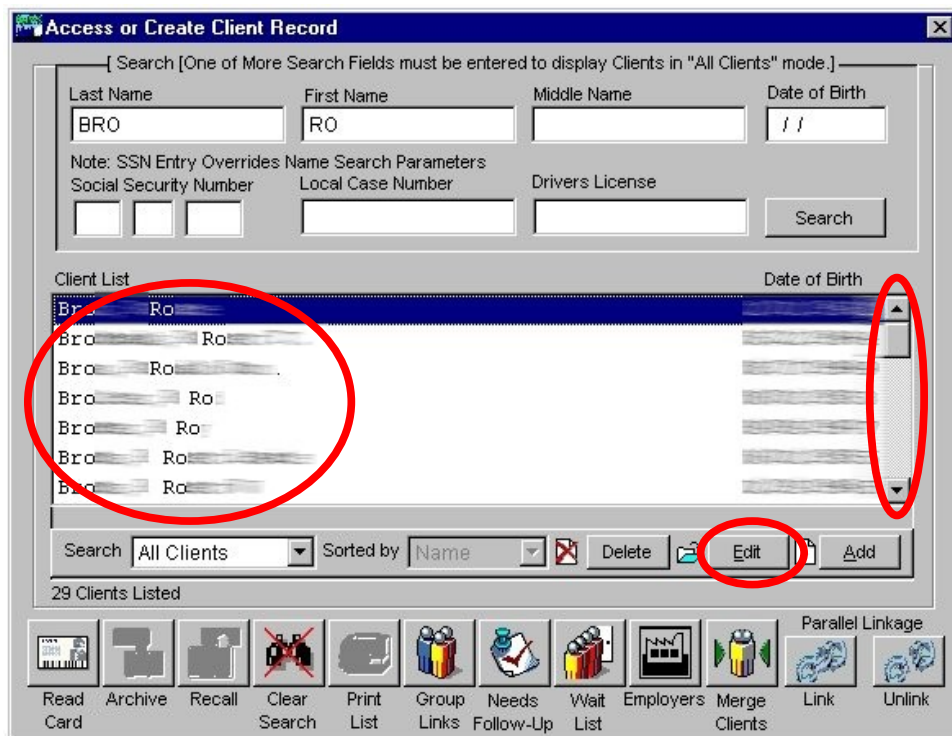
1) Click **Client Management**



make sure it is searching **All Clients**

2) Enter the first few letters of a client's name, then click the Search button.

If a client doesn't show up, try a different spelling, or try the Date of Birth or the Social Security number **without** the name.



3) Find the client on the list (you may have to scroll down the list).

4) Click the client's name.

5) Click the **Edit** button.

(you can also double-click the client's name to open their record)

### Having Trouble Finding a Client?

Try entering **less** information in the search screen, such as only the first name or only the last name, or even just the first few letters of the first or last name. You can get a list of clients by entering only **one letter** of a name, if you are really having trouble finding them.

It's possible that the client's name is misspelled or that they changed their last name, or were using an alias or nickname. Try entering **only** their birth date **or** the first or last few numbers of their Social Security number.

It's also possible that the client hasn't been entered into the system yet, and you will need to add them (see "**Adding a New Client**" for instructions).