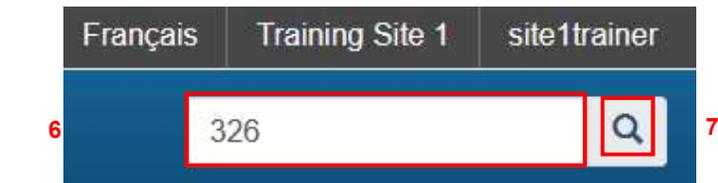


How to Search for a Client



1. Log-in to HIFIS. If you need assistance see the Quick Reference Guide on “How to Log Into HIFIS and Change Service Provider”.

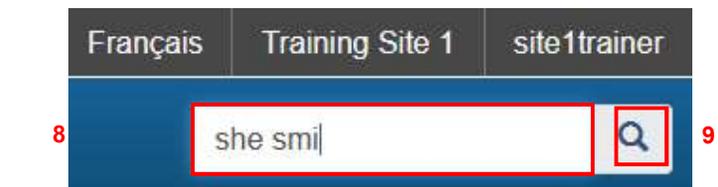
◆ **NOTE:** There are no steps 2 – 5, continue to step 6.



To search by (Client) ID

The ID is a unique, system-generated number that is visible to a user when a **Client List** is viewed.

6. On the **HIFIS Home Screen**, enter the client **ID** number in the **Client Search** dialog box.
7. Select **Search** to find the client.



To search by Name

8. On the **HIFIS Home Screen**, enter part of the client's name in the **Client Search** dialog box.

◆ **NOTE:** You must enter a minimum of three characters to execute a search. You may search a client by first, middle, last and/or alias name fields. Typically, the less you enter, the better the chance to find an existing name. For example, for “Shelley Smithers” you could enter “She Smi”. However, depending on the number of records found, it may be necessary to modify the search criteria by including more characters in one or more potential name fields (e.g. ‘shell smi’). It should be noted that HIFIS has modified how this search works and a search now looks for the string of characters provided anywhere within any of the searchable fields. For example, any of the following entries would find “Shelley” – hel, elle, ley.

9. Select **Search** to find the client.