Search for a Client - Client Search

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Path: Main Menu > Admissions Menu > Client Search

About

There are two ways to search for and select a client within NextStep Clinical. You can use any of the Search fields throughout the system or with the Admissions permission, **Client Search**, you will be able to search for and select a client on the Client Search page. **Note**: If your Agency does not see the Admissions permissions listed in Maintain Users, contact NextStep Support to provide your Agency with the Client Search Main Menu Setup.

- Client Search
  - Filter Client Search
  - Sort Client Search

Client Search

1. Navigate to Client Search by following the path above.
2. *(Optional)* Select the **Active Clients** or **All Clients** radio button**.** The Client Search page defaults to **All Clients** regardless of the client's admissions status.
3. In the **Search** field, enter part or all of a **Client ID**, **Client Last Name**, **Client First Name**, or **Client Date of Birth**.
4. The report displays all clients who match the search criteria. The row selected on the report displays with an orange background.
5. In the Set Client column, click the **Select** button to select the client.

You are returned to Main Menu where the selected client will become the active client. If a Discharged client is selected, you will only be able to select the buttons on the Main Menu that allow you to view or chart progress on a discharged client.

Filter Client Search

Once the search results are displayed, you can filter the data by a specific column or multiple columns. Use the specific column search field to filter the report further.

Client ID	Client Last Name	Client First Name	Date of Birth	Set Client

Sort Client Search

Once the search results are displayed, you can sort the data further by clicking a column header to sort by that column.

Client ID	Client Last Name		Client First Name	Date of Birth	Set Client