

TIPS FOR RECORD SEARCHES

If you're able to talk to a client before creating a new record for them, do that. Ask them if they've participated in any other Your Way Home programming in the past. These clients will already have a Clarity profile. Some programs they may have participated in are:

- Rapid Rehousing
- Stays in an emergency shelter
- Contact with the 2-1-1 call center in any way.

If you're unable to talk to a client directly, you should **always** search for a pre-existing profile before creating a new one.

Begin by searching for a client by name

- Search for a client's full name- first and last
- Search for a client's date of birth
- Search using a portion of the client's name- search "JOHN" to bring up all John's in the system
- Utilize any combination of these options

If you're unable to find a record for a client using these methods, they might have a de-identified profile already in the system. Search using the method for creating a de-identified profile.

- Try searching for the last 4 digits of the client's social security number, if they're willing to provide it. This will search for old de-identified profiles.
- Search for a client using the first three letters of their first name and the first letter of their last name
 - For example: John Smith- JOHS

If all searching is unsuccessful and you're creating a new profile for a client who wishes to be de-identified, remember to utilize the following method of naming so that profile can be easily located later.

Client First Name: First three letters of first name + First Letter of last name (JOHS above)

Client Last Name: Clarity Generated Unique Identifier- a unique set of numbers found on their Clarity profile.

You will have to put something in place of the last name to be able to complete the profile and receive the Clarity Identifier but you can then edit it after the profile is created