Client Search
(Finding a client in the I-SMART system)

Log into I-SMART. Choose appropriate Facility. Remember that in order to view a clients Episode you must be logged into the Facility that the Episode exists in. The only way to know is to search for the client and once you have found the episode that you want to view, if you are not logged into that facility you can change it at that time.

1. Left menu bar, click on Client List.

2. There are many different pieces to search by. First Name, Last Name, SSN, DOB, Client ID, Treatment Staff name or Case Status.

3. You can search by Treatment Staff.
   a. Click on the drop down arrow for Treatment Staff field and choose the staff member.
   b. Wait for screen to refresh and if you want to know the current caseload for this staff then put a Yes in the Primary Care Staff field and then change Case Status field to Clients with Open Cases.
   c. Click on Go.
   d. If the Staff has clients in the ISmart system then the names of these clients will appear in the Client List.

4. You can search by Client Name.
   a. The best way to do this is to use the wildcard search by entering the first few letters of the clients First Name in that field followed by an asterisk (*) and then do the same for the Last Name field.
   b. Wait for the screen to refresh and then click on Go.
   c. All client names that begin with the first few letters and the First and Last name will appear in the Client List.

There are more advanced ways of searching for clients, these are the basics. If you are interested in more information contact the Data department.