



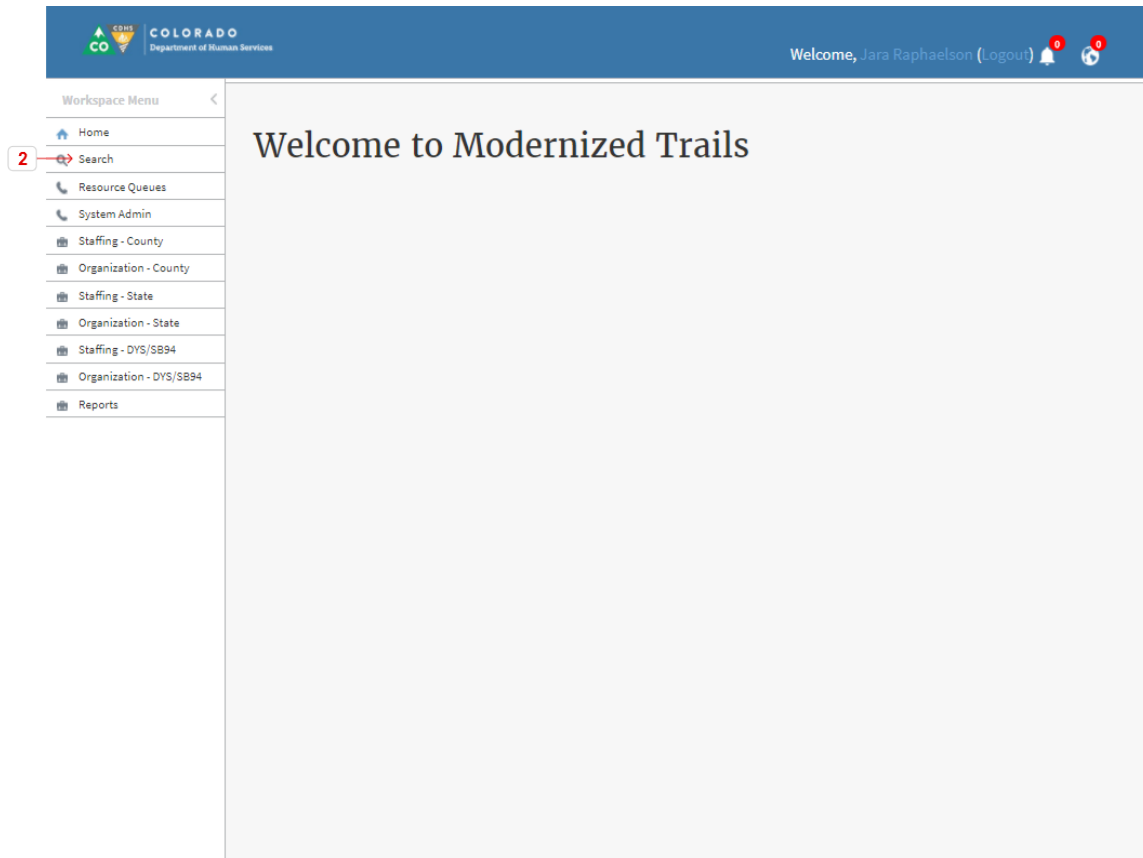
Purpose

This Job Aid provides you with a document that describes how to perform the task. You can print this document or save it to your local hard drive.

Procedure

1. Follow the steps below to complete the task:

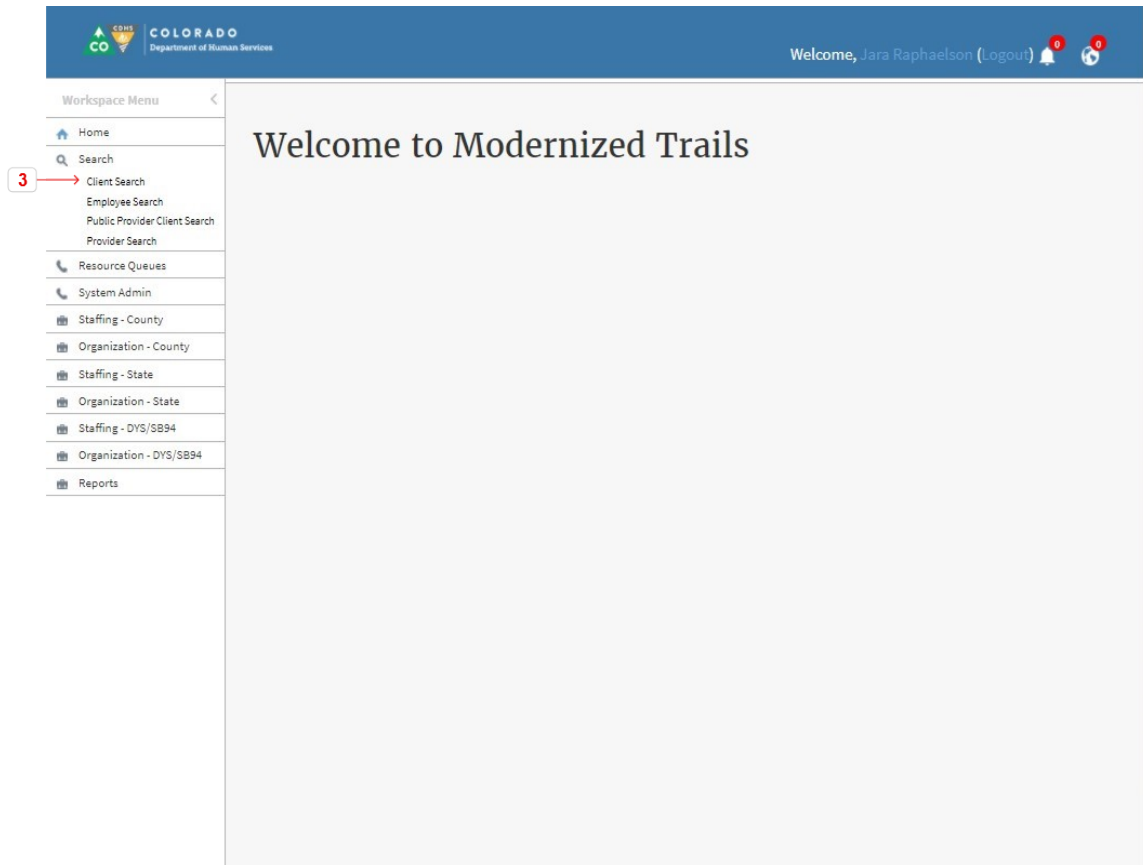
Colorado Trails - Google Chrome



2. Click the **Search** menu item. [Search](#)

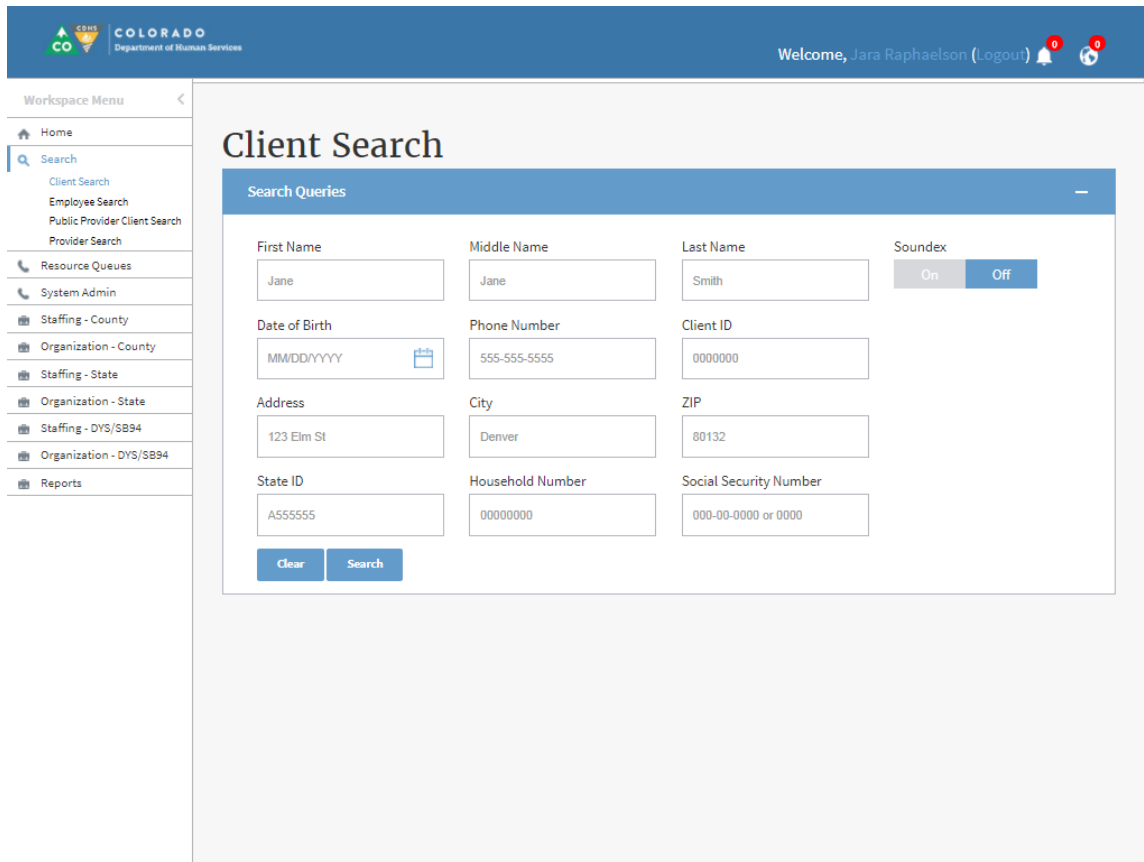


Colorado Trails - Google Chrome



3. Click the **Client Search** menu item. [Client Search](#)

Client Search - Google Chrome

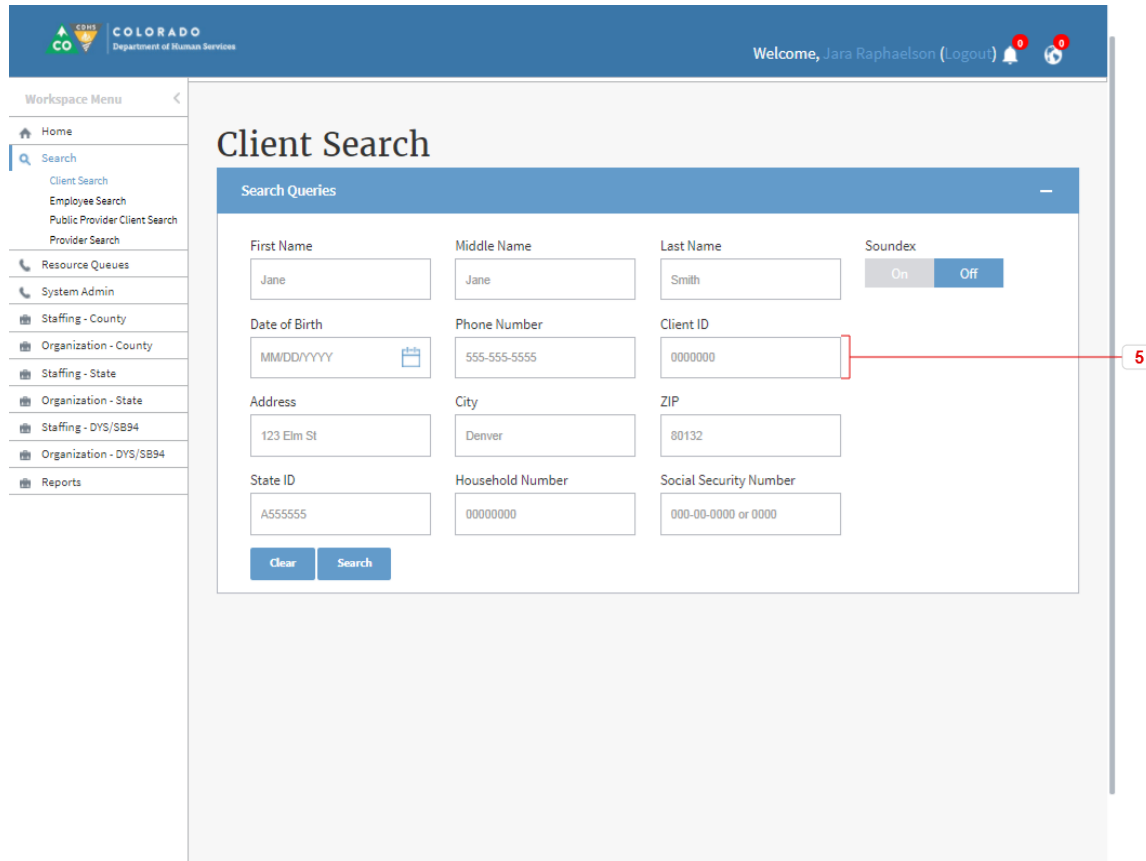


The screenshot shows the 'Client Search' page in a web browser. The page has a blue header with the Colorado Department of Human Services logo on the left and a user greeting 'Welcome, Jara Raphaelson (Logout)' on the right. A 'Workspace Menu' is visible on the left side, listing various search and administrative options. The main content area is titled 'Client Search' and contains a 'Search Queries' form. The form has several input fields for search criteria: First Name (Jane), Middle Name (Jane), Last Name (Smith), Date of Birth (MM/DD/YYYY), Phone Number (555-555-5555), Client ID (0000000), Address (123 Elm St), City (Denver), ZIP (80132), State ID (A555555), Household Number (00000000), and Social Security Number (000-00-0000 or 0000). There is also a 'Soundex' toggle switch set to 'Off'. At the bottom of the form are 'Clear' and 'Search' buttons.


4. Client Search page displays.

 The **Client Search** page displays.

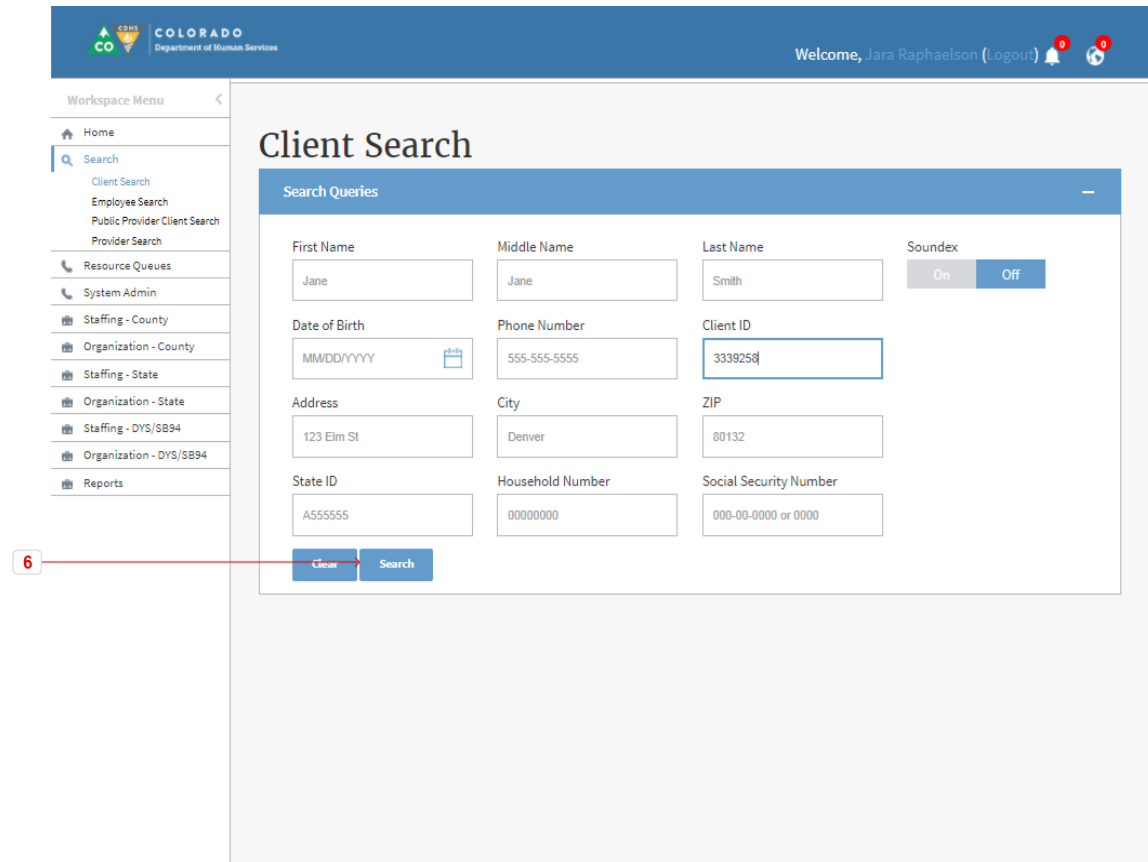
Client Search - Google Chrome



5. As required, complete/review the following fields:

Field	R/O/C	Description
Client ID	R	<p>Example: 3339258</p> <p> For this activity, enter Client 3339258.</p>

Client Search - Google Chrome



Workspace Menu

- Home
- Search
 - Client Search
 - Employee Search
 - Public Provider Client Search
 - Provider Search
- Resource Queues
- System Admin
- Staffing - County
- Organization - County
- Staffing - State
- Organization - State
- Staffing - DYS/SB94
- Organization - DYS/SB94
- Reports

Client Search

Search Queries

First Name	Middle Name	Last Name	Soundex
Jane	Jane	Smith	<input type="button" value="On"/> <input type="button" value="Off"/>
Date of Birth	Phone Number	Client ID	
MM/DD/YYYY <input type="button" value="Calendar"/>	555-555-5555	3339258	
Address	City	ZIP	
123 Elm St	Denver	80132	
State ID	Household Number	Social Security Number	
A555555	00000000	000-00-0000 or 0000	

6. Click **Search**.





Client Search - Google Chrome


Client Search

Search Queries +

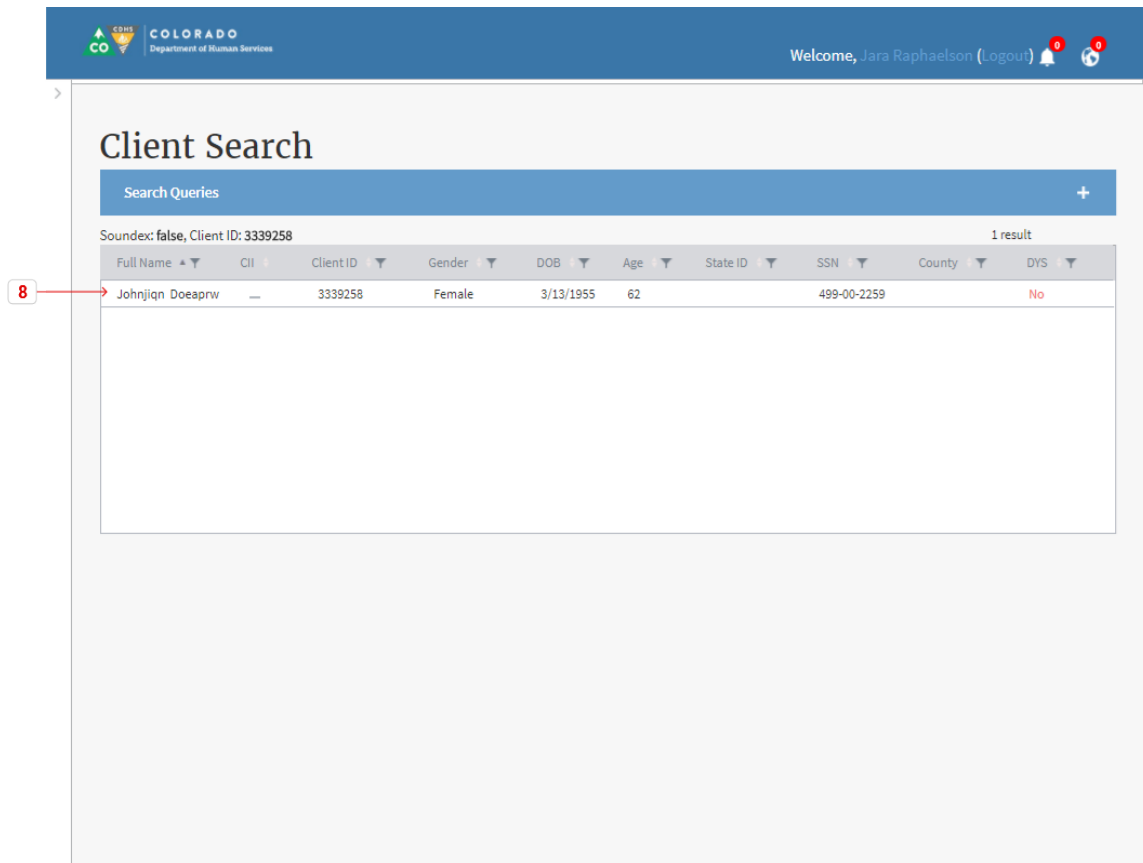
Soundex: false, Client ID: 3339258 1 result

Full Name	CII	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Johnliqn Doeaprw	-	3339258	Female	3/13/1955	62		499-00-2259		No

- 7. Client displays in the table.

 The client that matches your search criteria displays in the table.

Client Search - Google Chrome



Client Search

Search Queries +

Soundex: false, Client ID: 3339258 1 result

Full Name	CII	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Johnjiqn Doeaprw	—	3339258	Female	3/13/1955	62		499-00-2259		No

8. Click the **Full Name** link. [Johnjiqn Doeaprw](#)



Client Search - Google Chrome

Client Search

Search Queries +

Soundex: false, Client ID: 3339258 1 result

Full Name	CII	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Johnjln Doeaprw	—	3339258	Female	3/13/1955	62		499-00-2259		No

General Relations (0) Addresses (2) Phone (1) SB94 Cases (0) Admissions (0) CW Referral/Assessment (0)

Johnjln Doeaprw

Sex Assigned at Birth: Female

DOB: 03/13/1955

Age: 62

Client ID: 3339258

State ID:


SSN: 499002259

Custody Status: [History](#)

In Placement:

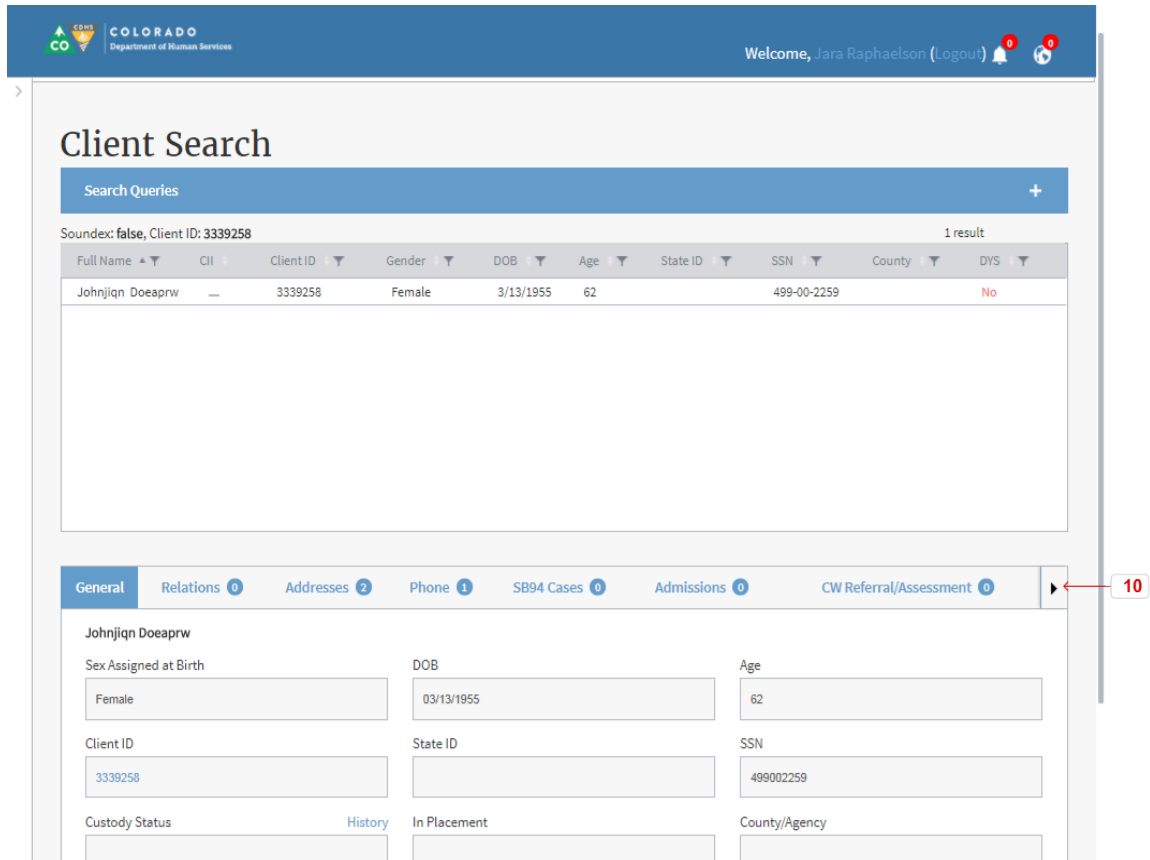
County/Agency:

9. Client Details display.

 Client details will display in tabs below the search results table with the General Tab displaying by default. By selecting a tab you can view further specific client information.

For this process, you will be selecting the **Associated Providers** tab.

Client Search - Google Chrome



Client Search

Search Queries +

Soundex: false, Client ID: 3339258 1 result

Full Name	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Johnjqn Doeaprw	3339258	Female	3/13/1955	62		499-00-2259		No

General Relations (0) Addresses (2) Phone (1) SB94 Cases (0) Admissions (0) CW Referral/Assessment (0) **Next**

Johnjqn Doeaprw

Sex Assigned at Birth: Female

DOB: 03/13/1955

Age: 62

Client ID: 3339258


State ID: [Empty]

SSN: 499002259

Custody Status: [Empty] [History](#)

In Placement: [Empty]

County/Agency: [Empty]

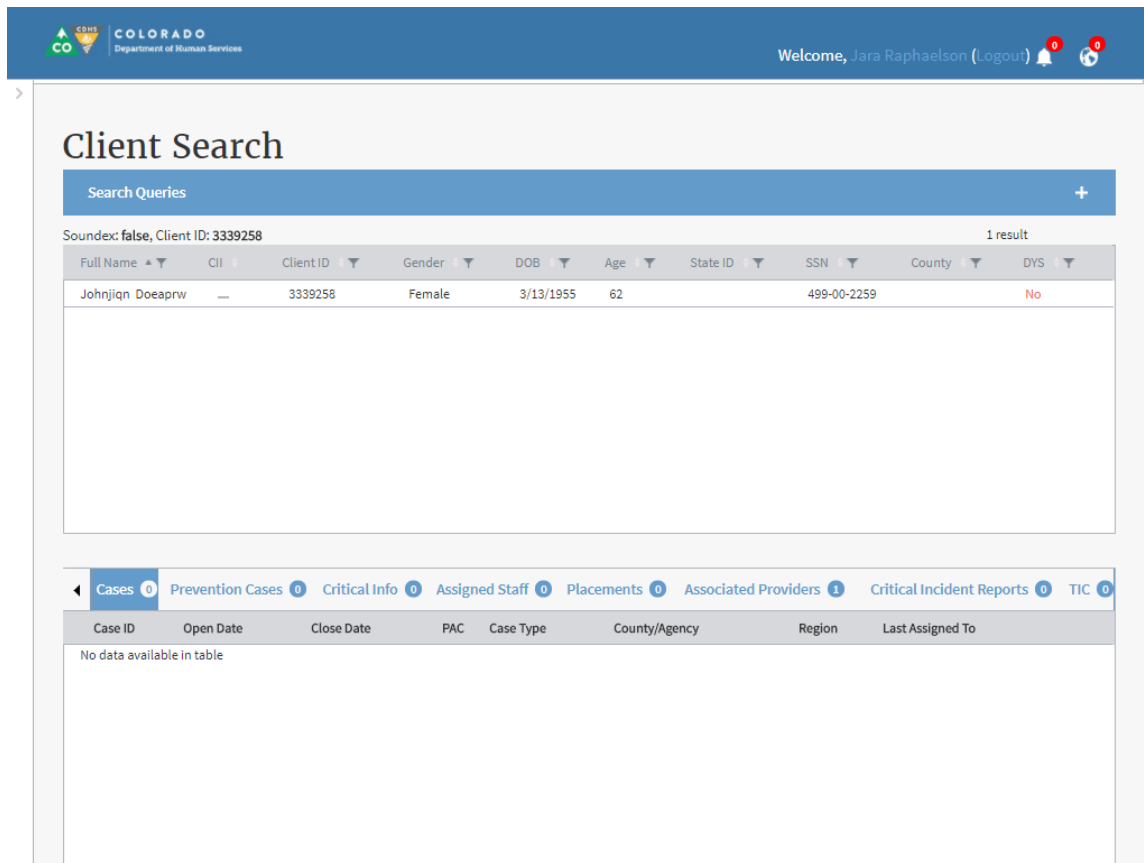
10. Click the **Next** link. 



For this process, you will be selecting the **Associated Providers** tab.

Since the Associated Providers tab is not in this first group of tabs, use the **Next** link to move to the next group of tabs.

Client Search - Google Chrome



Client Search

Search Queries +


Soundex: false, Client ID: 3339258 1 result

Full Name	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Johnliqn Doeaprw	3339258	Female	3/13/1955	62		499-00-2259		No

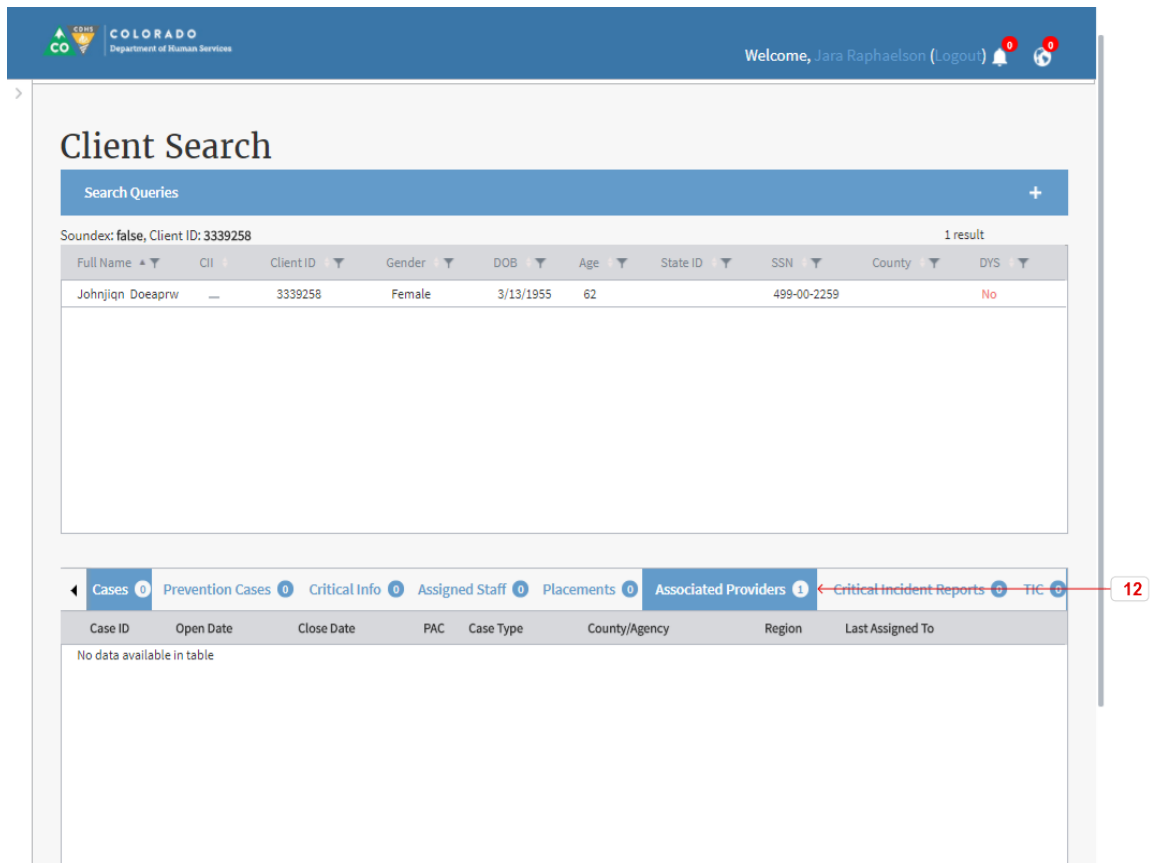
← Cases 0 Prevention Cases 0 Critical Info 0 Assigned Staff 0 Placements 0 Associated Providers 1 Critical Incident Reports 0 TIC 0

Case ID	Open Date	Close Date	PAC	Case Type	County/Agency	Region	Last Assigned To
No data available in table							

11. Next group of tabs.

 This opens the next group of tabs and provides you with a **Back** link to return to the previous group of tabs.

Client Search - Google Chrome



Client Search

Search Queries +

Soundex: false, Client ID: 3339258 1 result


Full Name	Client ID	Gender	DOB	Age	State ID	SSN	County	DYS
Johnjgn Doeaprw	3339258	Female	3/13/1955	62		499-00-2259		No

[Cases](#) [Prevention Cases](#) [Critical Info](#) [Assigned Staff](#) [Placements](#) [Associated Providers 1](#) [Critical Incident Reports](#) [TIC](#)

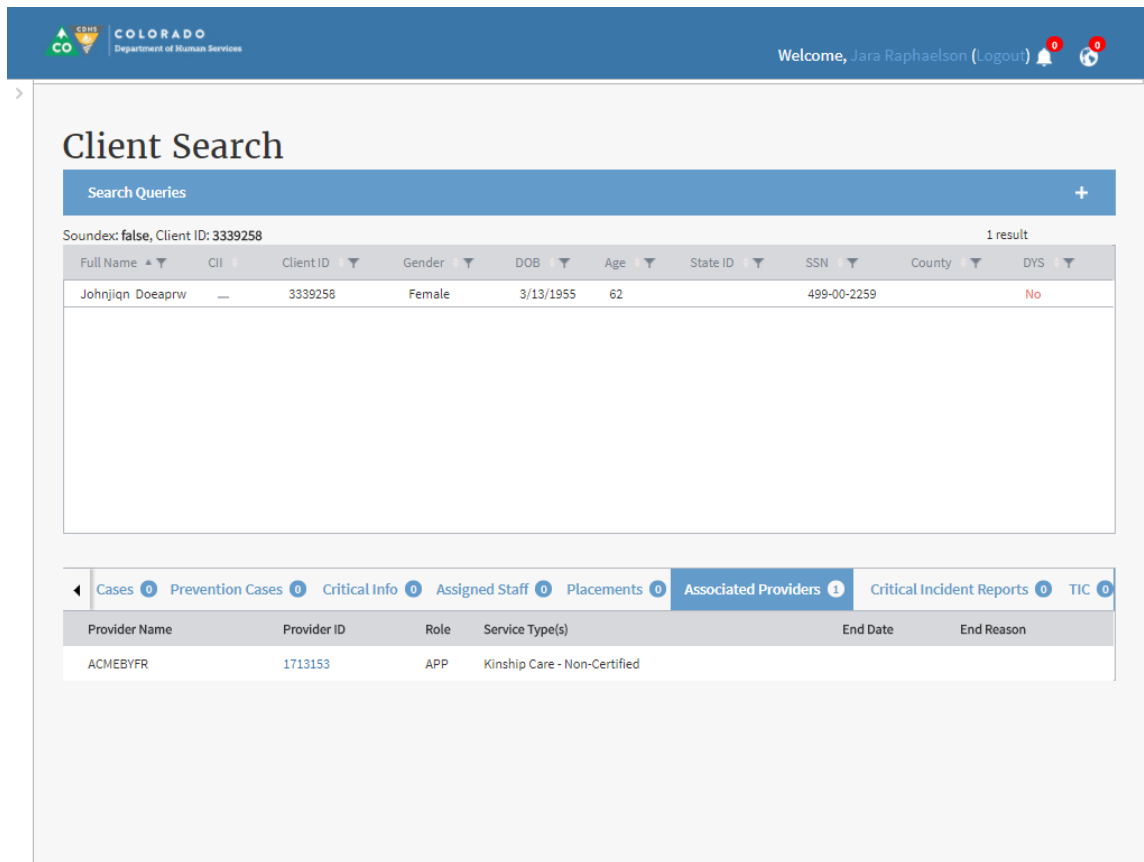
Case ID	Open Date	Close Date	PAC	Case Type	County/Agency	Region	Last Assigned To
No data available in table							

12. Click the **Associated Providers** tab.



 The number of Associated Provider records for this client is shown in the Associated Providers tab header. Click the Associated Providers tab to display the records.

Client Search - Google Chrome




The screenshot shows the 'Client Search' interface. At the top, there is a search bar with 'Search Queries' and a plus sign. Below it, the search criteria are displayed: 'Soundex: false, Client ID: 3339258' and '1 result'. A table lists the search results with columns: Full Name, CII, Client ID, Gender, DOB, Age, State ID, SSN, County, and DYS. The result shown is for 'Johnjqn Doeaprw' with Client ID 3339258, Female, DOB 3/13/1955, Age 62, SSN 499-00-2259, and DYS No.

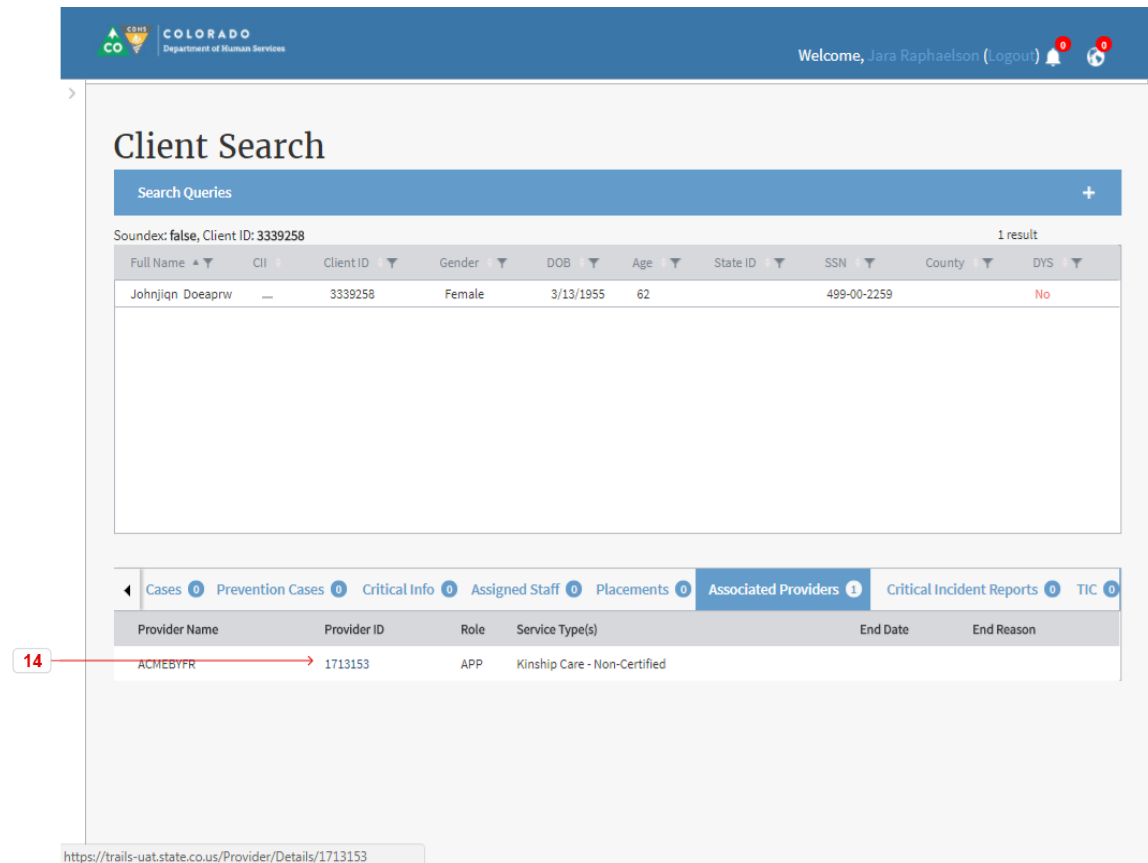
Below the search results, there is a tabbed interface with the following tabs: Cases (0), Prevention Cases (0), Critical Info (0), Assigned Staff (0), Placements (0), Associated Providers (3), Critical Incident Reports (0), and TIC (0). The 'Associated Providers' tab is selected, and it displays a table with the following data:

Provider Name	Provider ID	Role	Service Type(s)	End Date	End Reason
ACMEBYFR	1713153	APP	Kinship Care - Non-Certified		

13. List of Associated Providers displays.

 The list of all Associated Providers associated with the client are displayed and are sorted by Provider Name alphabetically.

Client Search - Google Chrome




The screenshot displays the 'Client Search' interface. At the top, there is a search bar with 'Search Queries' and a plus sign. Below the search bar, it shows 'Soundex: false, Client ID: 3339258' and '1 result'. A table lists the search results with columns: Full Name, CII, Client ID, Gender, DOB, Age, State ID, SSN, County, and DYS. The result is for 'Johniqn Doesprw' with Client ID 3339258, Gender Female, DOB 3/13/1955, Age 62, SSN 499-00-2259, and DYS No.

Below the search results, there is a navigation bar with tabs: Cases (0), Prevention Cases (0), Critical Info (0), Assigned Staff (0), Placements (0), Associated Providers (1), Critical Incident Reports (0), and TIC (0). The 'Associated Providers' tab is selected.

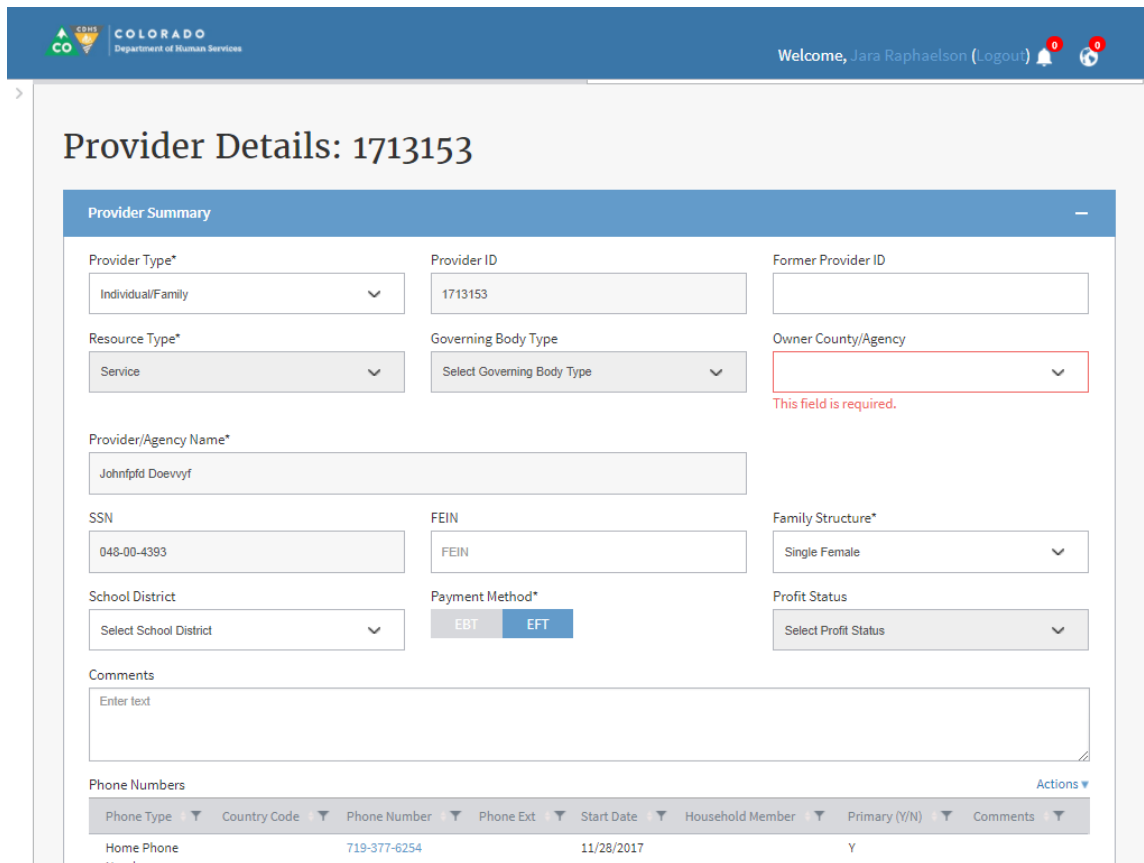
The 'Associated Providers' table has columns: Provider Name, Provider ID, Role, Service Type(s), End Date, and End Reason. The first row shows 'ACMEBYFR' as the Provider Name, '1713153' as the Provider ID, 'APP' as the Role, and 'Kinship Care - Non-Certified' as the Service Type(s). A red box labeled '14' points to the '1713153' link.

At the bottom of the screenshot, the URL is visible: <https://trails-uat.state.co.us/Provider/Details/1713153>

14. Click the **Provider ID** link. [1713153](#)

 The Provider Details page can be opened for a specific Provider from the Associated Providers list.

Provider Details - Google Chrome



Provider Summary

Provider Type*
Individual/Family

Provider ID
1713153

Former Provider ID

Resource Type*
Service

Governing Body Type
Select Governing Body Type

Owner County/Agency
This field is required.

Provider/Agency Name*
Johnfpfd Doevyvf

SSN
048-00-4393

FEIN
FEIN

Family Structure*
Single Female

School District
Select School District

Payment Method*
EBT EFT

Profit Status
Select Profit Status

Comments
Enter text

Phone Numbers Actions

Phone Type	Country Code	Phone Number	Phone Ext	Start Date	Household Member	Primary (Y/N)	Comments
Home Phone Number		719-377-6254		11/28/2017		Y	

15. Provider Details page displays.

 The **Provider Details** page displays.