Search Field – Reference Sheet
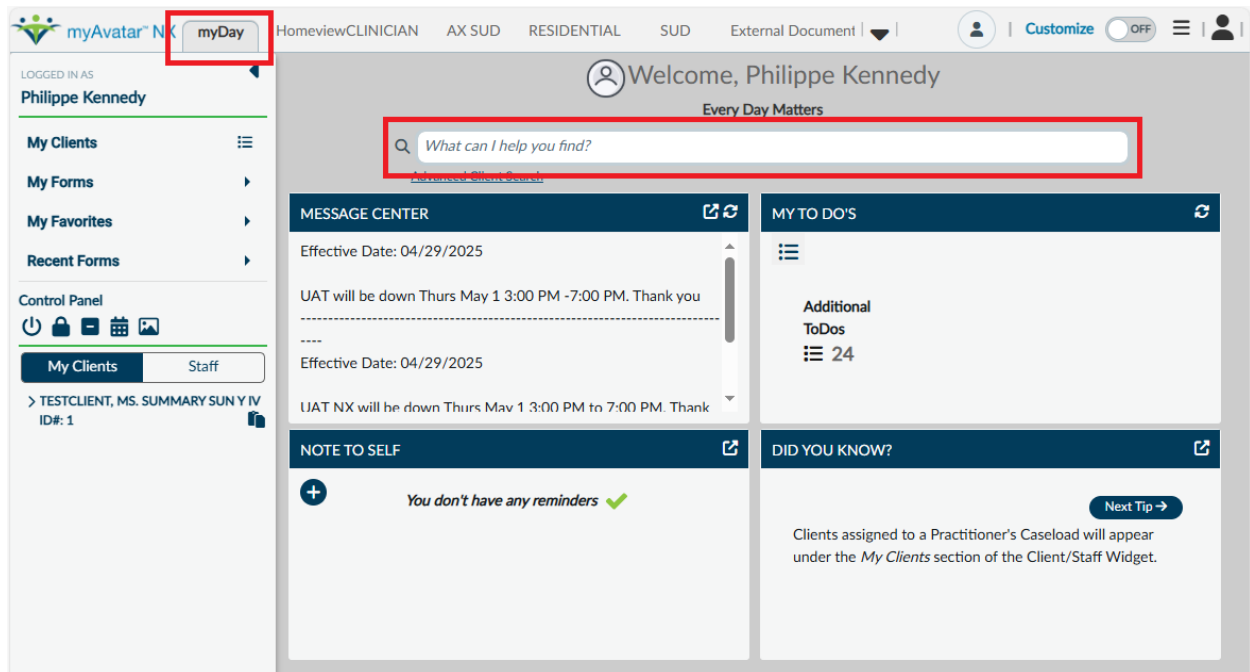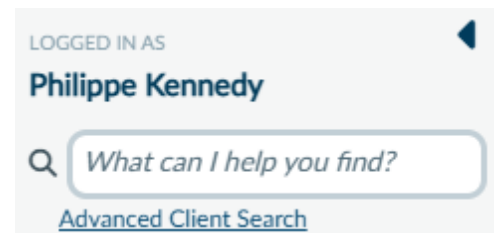
When first logging in to Avatar NX you will see the myDay page, displaying a search field near the top (with an <u>Advanced Client Search</u> link just below the field).

<u>NOTE</u>: When accessing other consoles or forms, the search field will move to the upper left corner of the screen, below your name.

All-In-One Searching

The Seach field is your all-in-one resource for locating forms, reports, clients, and staff. Type all or part of any keyword to locate your desired information.

For example, typing the word "test" in the Search field will generate a list of the clients, staff, and forms/reports that include your search term (see screenshot below).

The search results dialog that appears includes category tabs across the top (i.e., All, Clients, Staff, and Forms) with the number of results found for each category next to each tab. In the example below, 56 items include the "test" search term, including 45 clients, 6 staff, and 5 forms/reports.

Below the tabs are lists of results for each category. Click on a tab to display only the results in that category. For example, if you click on *Clients*, the search results dialog will list only clients that include your search term.

Scroll through the list and click on your desired item. If you click on a client name, they will appear selected on the left side of the screen. (A selected client is indicated by a vertical green line along the left edge of the client's name.) To load a specific form or report, click on its name under the Forms tab/section.

NOTE: When looking for a staff member, you can only search by last name. If you search for "gordon", only staff members with a last name of "Gordon" will be listed (while, for clients, anyone with a first or last name of "Gordon" will be listed).

Advanced Client Search

Just below the Search field is the Advanced Client Search link. Click the link to open the *Client Search* dialog (see screenshot below).

The *Client Search* dialog allows you to perform more detailed, client-specific searches. You will need to enter text in at least three of the fields before you can click the *Search* button.

After clicking *Search*, a list of clients matching the search terms that you entered will be displayed below. You can sort the results by clicking on any of the column labels (e.g., clicking on *Social Security Number* will sort the list from lowest to highest SSN).

As with the regular Search field, if you click on a client name in the *Client Search* dialog, they will appear selected on the left side of the screen.

Tips

Your searches will be more successful if you use less common terms. For example, to search for the *Progress Notes (Group and Individual)* form, you might use "individual" instead of "progress" as a search term.

Also, be careful about adding a space after your search term—it will be included when searching for a form or report. For example, when searching for the *Progress Notes (Group and Individual)* form, a search term of "individual" will locate the form, while "individual " will not.