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Overview

The Search screen displays whenever you need to locate a specific Client, this may be because you are booking them an appointment, adding a referral, etc. or because you have chosen the Client's View or Demographics options from the menu.

The Search screen is divided into two sections. The top section of the screen allows you to search using a unique Client number; the lower section of the screen allows you to search using demographic information.

The Search screen is the same but where it takes you in the Client's record depends on the Menu button selected e.g. Client's View will take you to the Client's View - Clinical Portal screen, Demographics will take you to the Client's Demographic details screen and Referrals will take you to the Client's Referral screen.

Searching Using a Unique Client Number

When using the top section of the search screen always use the parallel **Go** button.

Client ID		Go
NHS Number		Go
Alternative ID/System		Go
	All systems ▼	



Searching using Client ID (Rio Number)

The Client ID number is the number Rio gives to the Client when they are first registered on the system.

- Click **Client ID** field
- Type **Client ID** (Rio) Number
- Click **Go**

The Client's record will open.

Searching using NHS Number

The NHS number is the number given to the Client when they are first registered with NHS England.

- Click **NHS** Number field
- Type **NHS** Number
- Click **Go**

The Client's record will open.

Searching using Alternative ID Number

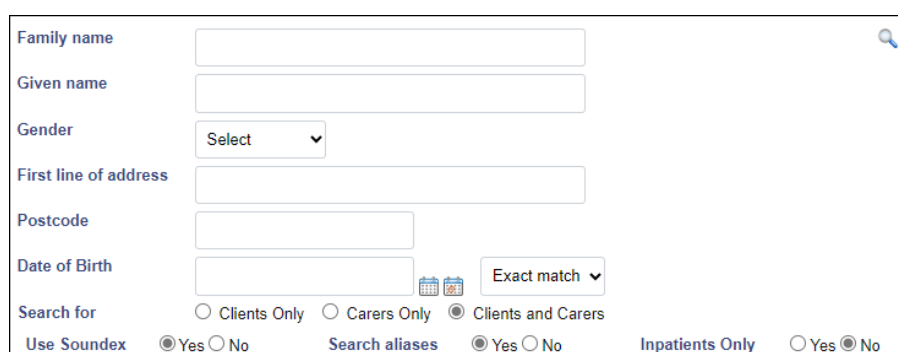
An Alternative ID/System number is a number recorded in the Clients demographics and may, for example be an old number from a previous system.

- Click **Alternative ID/System** field
- Type **Alternative Number**
- Click **Go**

The Client's record will open.

Searching Using Demographic Information

When using the lower section of the Search screen, enter the demographic information and always click the magnifying glass. 



The screenshot shows a search form with the following fields and options:

- Family name**: Text input field.
- Given name**: Text input field.
- Gender**: Dropdown menu with 'Select' and a downward arrow.
- First line of address**: Text input field.
- Postcode**: Text input field.
- Date of Birth**: Text input field with a calendar icon and a date range indicator.
- Exact match**: Dropdown menu.
- Search for**: Radio buttons for ☐ Clients Only, ☐ Carers Only, and ☒ Clients and Carers.
- Use Soundex**: Radio buttons for ☒ Yes and ☐ No.
- Search aliases**: Radio buttons for ☒ Yes and ☐ No.
- Inpatients Only**: Radio buttons for ☐ Yes and ☒ No.



The 4 Main Search Criteria

For best practice, it is recommended to use the following when searching for a Client using demographics.

- Complete the following fields:
 - Family name
 - Given name
 - Gender
 - Date of Birth

- Click 

The **Search Results** screen will display showing all the Clients who match your search criteria.

- Locate the **correct** Client from the available search results
- Click the **Client's name**

The Client's record will open.

Searching using the Client's Address

This search will return all the Client's who are registered in Rio, at the specified address.

- Complete the following fields:
 - Family name
 - First line of address
 - Postcode

- Click 

The **Search Results** screen will display showing all the Clients who match your search criteria.

- Locate the **correct** Client from the available search results
- Click the **Client's name**

The Client's record will open.



Searching using the Wildcard

The Wildcard symbol in Rio is the asterisk * (above the number 8 on your keyboard) and can be used in any field when search criteria is unknown.

For example, if you didn't know how to spell Josephine Bloggs, you could use the wildcard to replace some or all of the name.

- Use Jo* to find all Clients whose name begins with Jo
- Use *oggs to find all Clients whose name ends with oggs

As Rio needs 2 items of search criteria to return a result, the wildcard can also be used to replace an entire field.

For example, if you didn't know the given name for Josephine Bloggs.

- Enter a Family name of Bloggs
- Enter * in the Given name field

Rio will find all the Clients with the Family name of Bloggs.

Searching Options

There are 3 radio buttons ☐ Soundex, ☐ Alias and ☐ Inpatients.

By default, ☐Soundex and ☐Alias are selected as Yes; ☐Inpatients is selected as No

Use Soundex	☒ Yes ☐ No	Search aliases	☒ Yes ☐ No	Inpatients Only	☐ Yes ☒ No
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When Yes is selected these will search for:

- ☒ **Soundex** Clients with a similar sounding name
- ☒ **Alias** Clients that are also known by another name eg maiden name, nickname
- ☒ **Inpatients** Clients currently in an inpatient unit