

Home Clinic Portal: Search/Add/Edit Client

This quick reference contains instructions for locating existing client records, editing client records and adding new client records within the Home Clinic Portal.

Getting Started

1. Log onto the [Home Clinic Portal](#)
2. Acknowledge the Confidentiality Statement by selecting **OK**.
3. Select **Client/Enrolment** from the Home page menu bar.

Search for Existing Client

1. Enter as much client-specific data as you have available on the Search Client window. Then, select the **Search** button.

[Add](#)

Search Client

PHIN: **1** Last Name: Administrative Sex:

MHRN: First Name:

Other Identifier: Date of Birth:

Select the Clear button to delete previously entered search criteria, and begin a new search.

Click row to view client details

Name	Identifier	DOB	Administrative Sex
test, test	2 AB Personal Health Number: 123456789	01-Jan-2000	Male

2. Possible matches to your search criteria will be displayed in the Search Results area below. Click on the appropriate row to view Client Details.

It is possible that you may not see any results from your searches. In this case, a message will display indicating **No Client Found**.

Search Client

PHIN: Last Name: Administrative Sex:

MHRN: First Name:

Other Identifier: Date of Birth:

No Client Found

Add Client

1. Select the **Add** button at the top right of the Search Client window.

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Add Client

First Name *	<input type="text"/>	PHIN	<input type="text"/>
Last Name *	<input type="text"/>	MHRN	<input type="text"/>
Middle Name	<input type="text"/>	Other Identifier(s)	<input type="text"/> <input type="text"/> <input type="button" value="↺"/> <input type="button" value="⊕"/>
Date of Birth *	<input type="text" value="DD-Mon-YYYY"/>	Other Identifier Value	<input type="text"/>
Administrative Sex *	<input type="text" value="--Select--"/>		

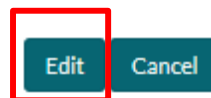
Contact

Street Line 1	<input type="text"/>	Province *	<input type="text" value="Manitoba"/>
Street Line 2	<input type="text"/>	Postal Code	<input type="text"/>
City	<input type="text"/>	Phone	<input type="text" value="204-xxx-xxxx"/>

2. Enter all available client information. Note that required fields are indicated by an asterisk (*).
3. Select the **Save** button to create the new client record.

Edit Client

1. If the Client Details are not complete, or if you have more accurate information, select the **Edit** button at the top right of the Client Details window.



2. In the Edit Client window, update the information as required.
3. Select the **Save** button to update the client record.