Home Clinic Portal: Search / Add / Edit Client

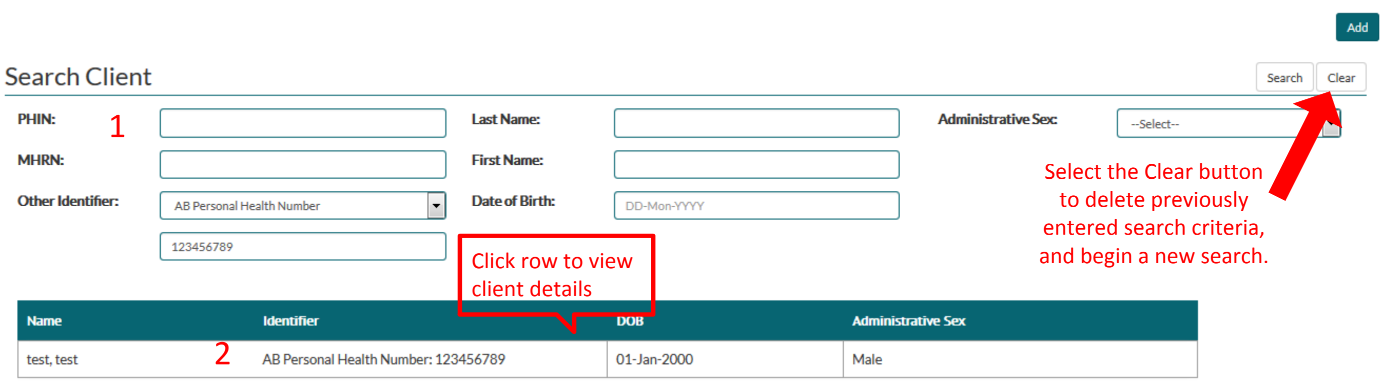
This quick reference contains instructions for locating existing client records, editing client records and adding new client records within the Home Clinic Portal.

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.

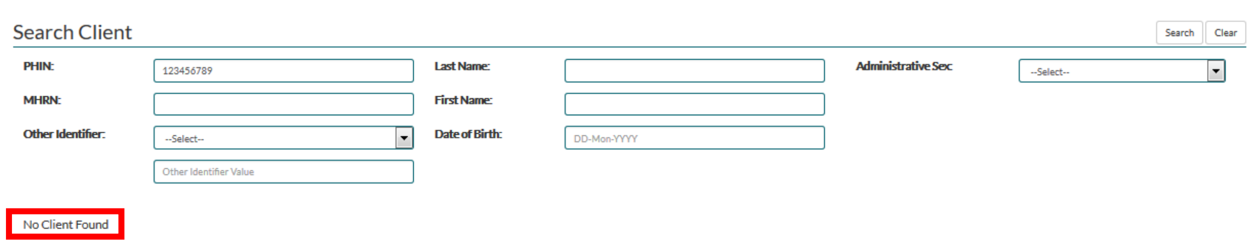
Search for Existing Client

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



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***.



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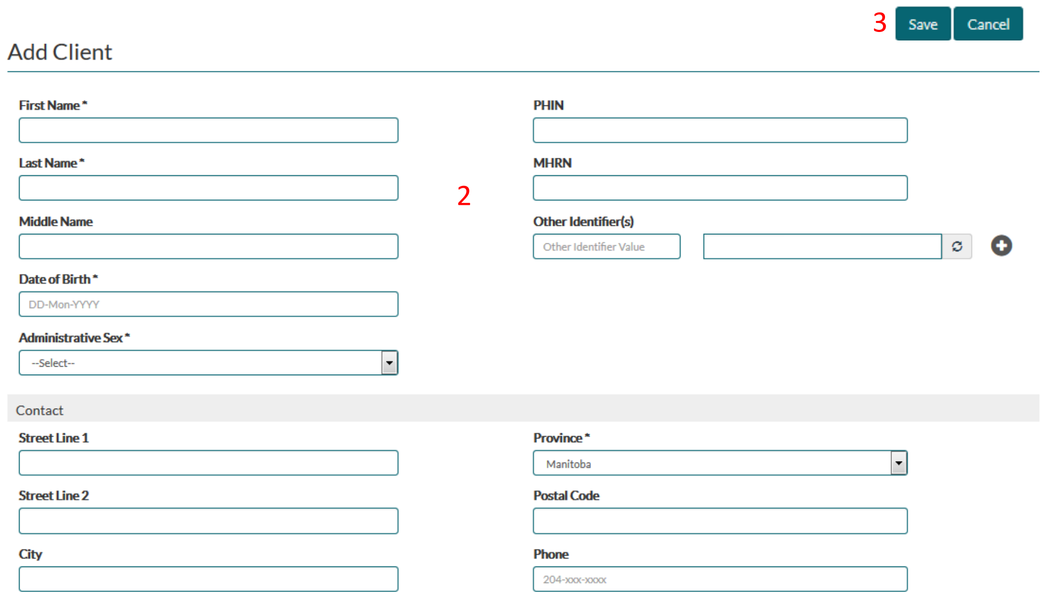
Add Client

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

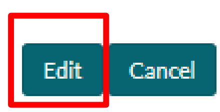


2. Enter all available client information. Note that required fields are indicated by an asterisk (*).

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.