

Find a patient and open the chart

Find the correct patient record before you begin reviewing the chart.

For: Clinic staff and clinicians

Before you start

- Sign in with access to the patient's record.

What you'll achieve

The correct patient's chart is open.

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Find the patient

Open Clients and search for the patient's name. Check the matching record before opening it.

The screenshot displays the 'User Clients' management interface. At the top, there's a search bar with the text 'Search... %K'. Below the search bar, the 'Clients' section is visible, featuring a '+ Add Client' button and an 'Actions' dropdown menu. A 'QUICK STATS' section shows 'ACTIVE CLIENTS' as 199, and a breakdown by category: PRIVATE PAY (127), ICBC (8), PEDIATRIC ABA (2), and OTHER (3). Below this, a search bar contains 'Jeff Adams' with a search icon and a close button. To the right of the search bar are buttons for 'More Filters', '1 Search', '6 File Status', and 'Clear all'. A 'Sort' dropdown and a refresh icon are also present. The main table lists three records for 'Jeff Adams MSP', all with 'Open' status. The first record is a 'Physiotherapist' assigned to 'Maya Chen'. The second is a 'Clinical Counsellor' assigned to 'Sam Rivera'. The third is a 'Physician' assigned to 'Dr. Elena Vasquez'. All three are listed as 'Service Provider'. The table has columns for Client, Status, Profession, User, Role, City, and Actions. At the bottom right, it shows 'Records per page: 10' and '1 - 3 of 3'. A 'Feedback' button is located on the right side of the interface.

Work
Money
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Settings

Home / User Clients

Clients

+ Add Client Actions

QUICK STATS

ACTIVE CLIENTS
199

PRIVATE PAY 127 ICBC 8 PEDIATRIC ABA 2 OTHER 3

Bookmarks Jeff Adams More Filters 1 Search 6 File Status Clear all Sort

Client	Status	Profession	User	Role	City	Actions
Jeff Adams MSP	Open	Physiotherapist	Maya Chen	Service Provider		
Jeff Adams MSP	Open	Clinical Counsellor	Sam Rivera	Service Provider		
Jeff Adams MSP	Open	Physician	Dr. Elena Vasquez	Service Provider		

Records per page: 10 1 - 3 of 3

Feedback

2

Open the chart

Open the matching patient record. Confirm the patient's identity, then review the chart overview.

 **Contact**

Firstname	Lastname	Date of Birth	Age
Jeff	Adams	October 1, 1996	30 years

Phone

 (604) 555-0606

