CMS Searches

Search

Searches can be done for the following:

- Authorization – used to look up authorizations when asking for clarification/okay for payment
- Budget – would not be used outside of accounting
- Client – used to search for clients/referrals
- Office – would not be used as there is only one office
- Provider – used to look up vendor's name, contact person, services available to be purchased
- Work Request – this would search all work request (not counselor/teacher specific)

Helpful Hints

- When searching, there are drop down boxes with an option to change from 'Equal To' to Not Equal To, Like, Not Like, Starts With, Ends With. This can be helpful when searching for things like:
  - Authorization numbers – Example:
    - Searching authorization number Auth-2024-32742
    - Search by Authorization/Authorization Number/Ends with/32742
  - Client name – Example:
    - Searching client with name Wayne Gretzky but unsure of how to spell last name
    - Search by Client/Last Name/Ends With/Gret
- Clients can be searched by a variety of filters. Most commonly used are:
  - First Name
  - Last Name
  - Case Manager
- You can narrow down searches with numerous filters - Example:
  - Client
    - First Name-Jamie
    - Last Name – Ends with Phip
    - Case Manager – Sarah Baebler

Status Search by Counselor:

- Search
- Standard Search

- Check Client
- Check Case Manager
- Drop Down Box - Choose Counselor
- Check Program
- Filter Status
- Drop Down Box: Choose either: VR applicant (02), VR eligible (10), VR plan (12), VR employment (22), and VR closed (26/28/30)