



**HOW TO:
Find Clients Using TC_ID**

INTRODUCTION:

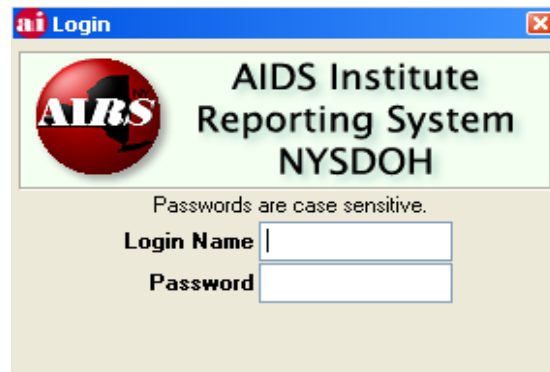
Client information can be retrieved by Name, agency-assigned Client ID #, DOB, SSN, Insurance Number, Case #, or by the internal AIRS codes for TC_ID and CLIENT_ID.

Periodically, data quality checks are run against data that your agency submits each month to the AIDS Institute. AIDS Institute personnel may ask you to correct missing or inconsistent data. Since there are no names included in the AIDS Institute's dataset, the internal client code, TC_ID, will be provided to you so you can look up clients in AIRS to update or add information. This document shows you how to retrieve a client by their TC_ID.

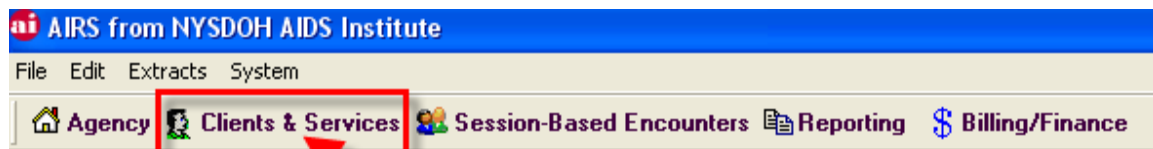
- TC_ID is one of the internal codes associated with all clients in AIRS.
- TC_ID is a 10 character field that contains CAPITAL letters and numbers.
- Searching is **case sensitive** so you must enter the TC_ID with upper case letters.
- Once you've been given the TC_ID, the following steps allow you to find the client using their TC_ID.

STEPS:

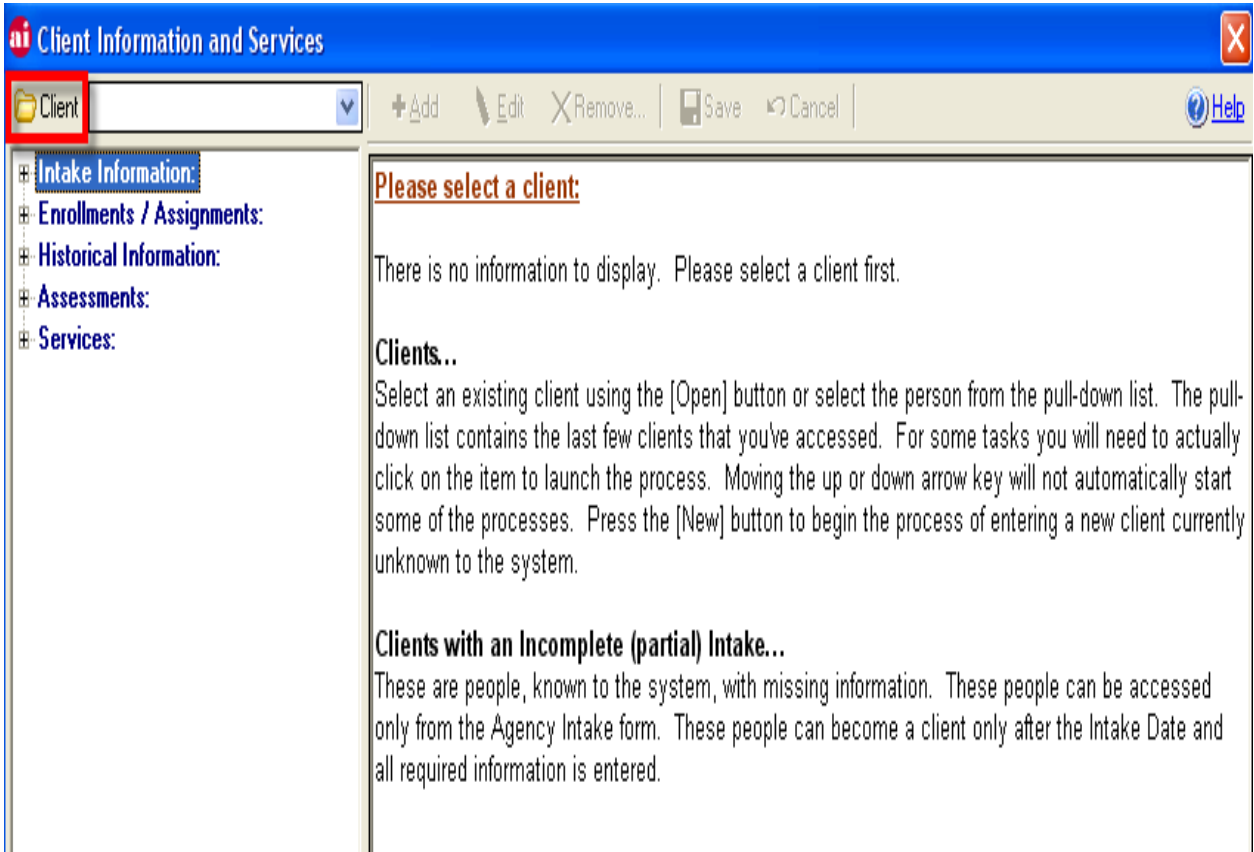
1. Log into AIRS.



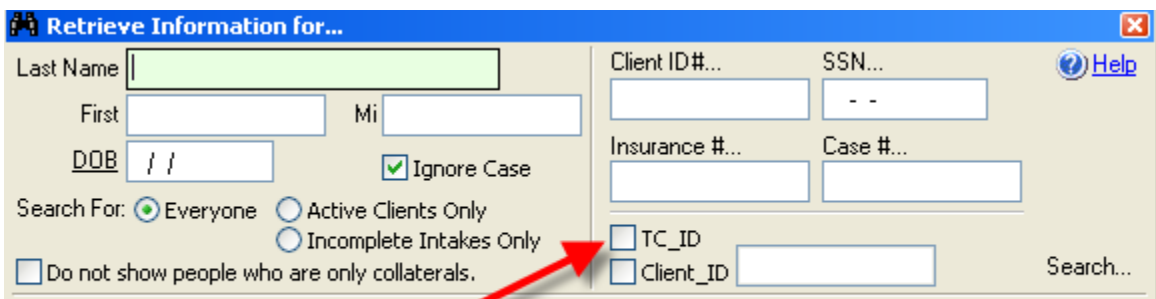
2. Click on the CLIENTS & SERVICES Module.



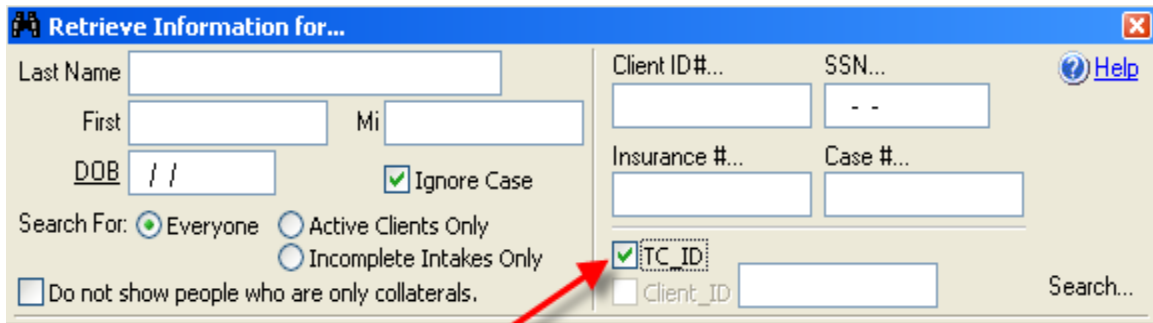
- Click on the CLIENT button on left (above Intake Information menu option).



- You will see the following screen. Note the empty check-box to the immediate left of TC_ID (found on the bottom right hand side of the window).



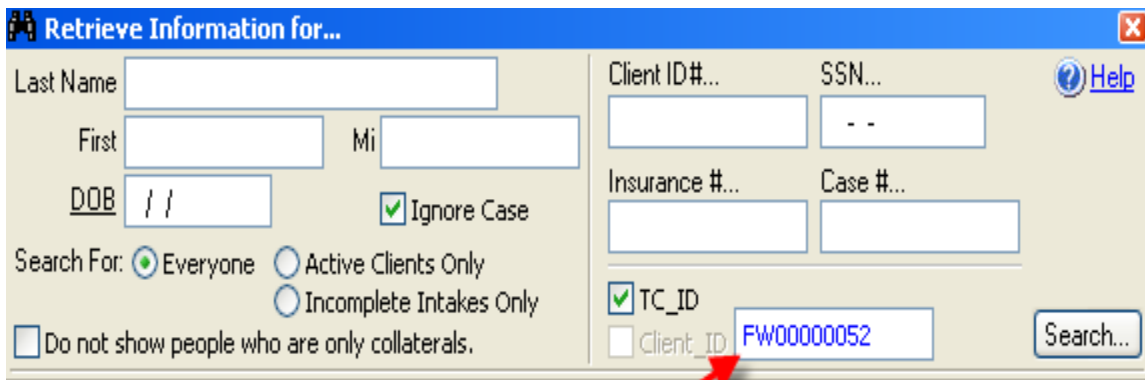
- To place a 'check' in the box, click directly on the empty box immediately to the left of "TC_ID".



The screenshot shows the 'Retrieve Information for...' dialog box. The 'TC_ID' checkbox is checked, and a red arrow points to it. The dialog box contains the following fields and options:

- Last Name: []
- First: [] Mi: []
- DOB: [/ /] Ignore Case
- Search For: Everyone Active Clients Only Incomplete Intakes Only
- Do not show people who are only collaterals.
- Client ID#: []
- SSN: [- -]
- Insurance #: []
- Case #: []
- TC_ID
- Client_ID []
- Search... button

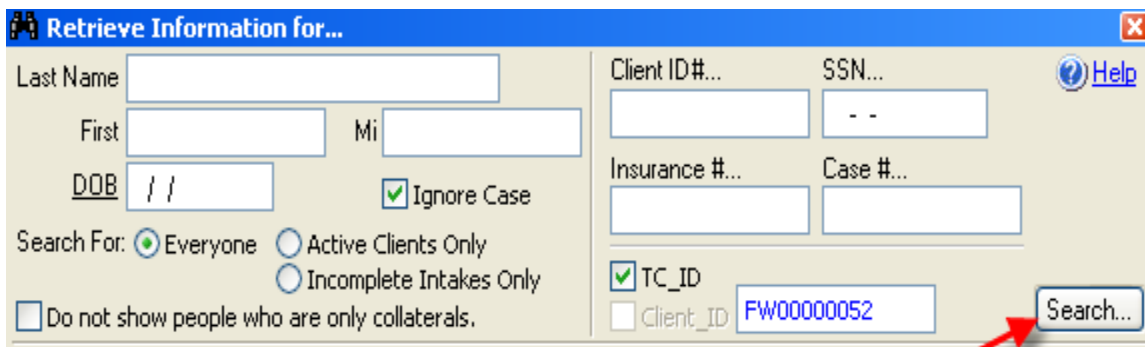
- In **CAPITAL** letters, enter the 10-character TC_ID code (that you were given).



The screenshot shows the 'Retrieve Information for...' dialog box. The 'TC_ID' checkbox is checked, and the 'Client_ID' field contains the value 'FW00000052'. A red arrow points to the 'Client_ID' field. The dialog box contains the following fields and options:

- Last Name: []
- First: [] Mi: []
- DOB: [/ /] Ignore Case
- Search For: Everyone Active Clients Only Incomplete Intakes Only
- Do not show people who are only collaterals.
- Client ID#: []
- SSN: [- -]
- Insurance #: []
- Case #: []
- TC_ID
- Client_ID FW00000052
- Search... button

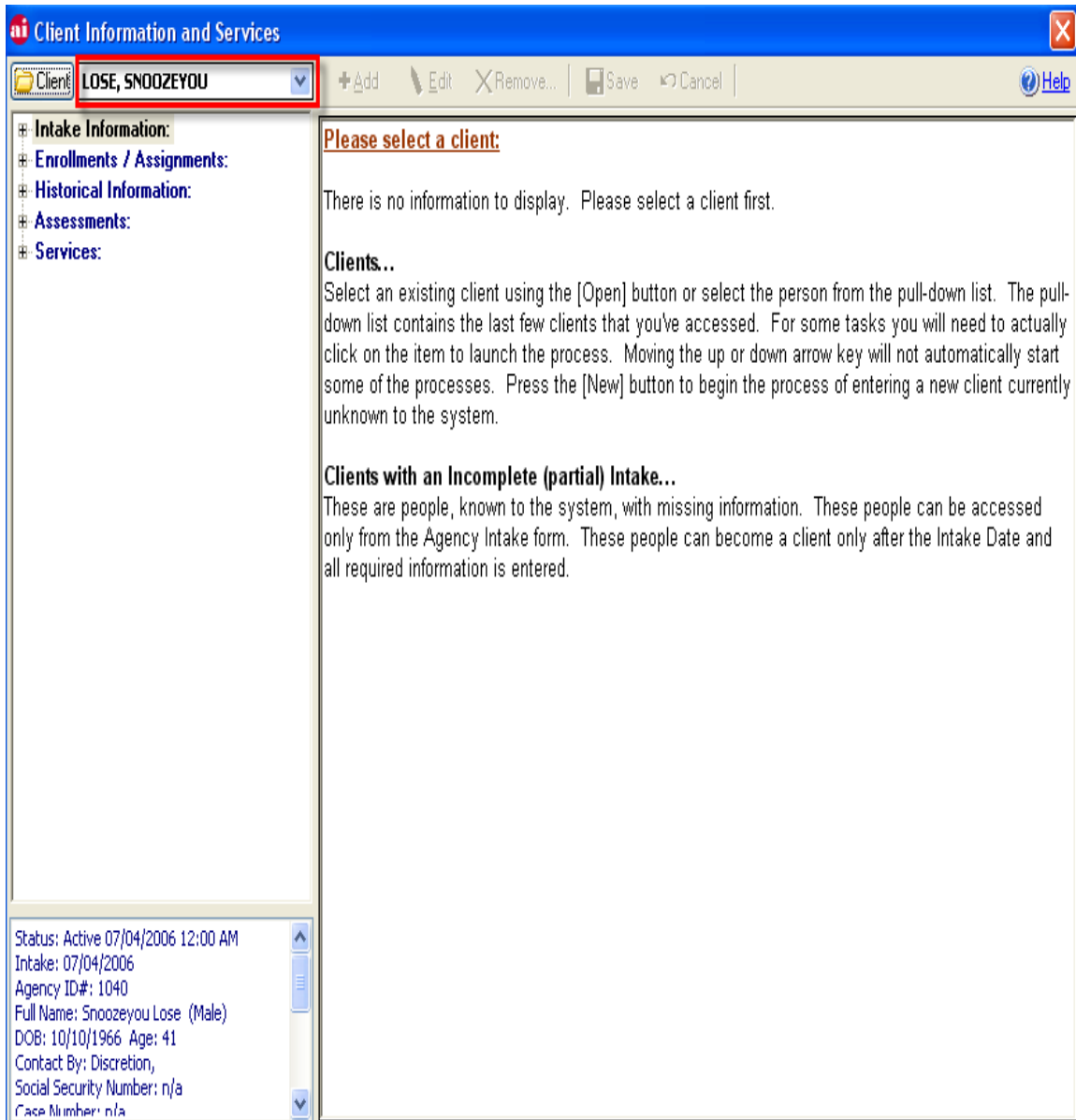
- Click on the [Search] button.



The screenshot shows the 'Retrieve Information for...' dialog box. The 'TC_ID' checkbox is checked, the 'Client_ID' field contains the value 'FW00000052', and the 'Search...' button is highlighted with a red arrow. The dialog box contains the following fields and options:

- Last Name: []
- First: [] Mi: []
- DOB: [/ /] Ignore Case
- Search For: Everyone Active Clients Only Incomplete Intakes Only
- Do not show people who are only collaterals.
- Client ID#: []
- SSN: [- -]
- Insurance #: []
- Case #: []
- TC_ID
- Client_ID FW00000052
- Search... button

9. Once selected, the client's name will appear in the (drop-down) box to the right of the [Client] button. (Note: They become part of your list of the last 15 clients accessed.)



Client Information and Services

Client: **LOSE, SNOOZEYOU** +Add Edit Remove... Save Cancel Help

Intake Information:
Enrollments / Assignments:
Historical Information:
Assessments:
Services:

Please select a client:

There is no information to display. Please select a client first.

Clients...
Select an existing client using the [Open] button or select the person from the pull-down list. The pull-down list contains the last few clients that you've accessed. For some tasks you will need to actually click on the item to launch the process. Moving the up or down arrow key will not automatically start some of the processes. Press the [New] button to begin the process of entering a new client currently unknown to the system.

Clients with an Incomplete (partial) Intake...
These are people, known to the system, with missing information. These people can be accessed only from the Agency Intake form. These people can become a client only after the Intake Date and all required information is entered.

Status: Active 07/04/2006 12:00 AM
Intake: 07/04/2006
Agency ID#: 1040
Full Name: SnoozeYOU Lose (Male)
DOB: 10/10/1966 Age: 41
Contact By: Discretion,
Social Security Number: n/a
Case Number: n/a

10. Once you have retrieved the client, all their information become available so you may clean up any deficiencies that have been pointed out.

Click directly on the [+] to the left of each option to allow access to the screens for the client's information. This includes Intake, Status Change, Program & Group Enrollments, Historical information (for example, Diagnosis, HIV Status, Risk, Insurance, Labs, Medications, Pregnancy, Referrals, TB Status, etc.), Assessments, and/or Services.

Client Information and Services

Client: **LOSE, SNOOZEYOU** + Add Edit Remove... Save Cancel Help

- # Intake Information:
- # Enrollments / Assignments:
- # Historical Information:
 - Collateral Information...
 - Diagnosis Information...
 - Financial Information...
 - HIV Status Information...
 - HIV/AIDS Risk History...
 - Insurance Information...
 - Laboratory & Psychological Tests...
 - Medication History...
 - Placement / Visit History...
 - Pregnancy Information...
 - Primary Care Physician Information...
 - Referral Tracking...
 - Substance Use History...
 - TB Status...
- # Assessments:
- # Services:
 - Services Form...
 - Legal Services...
 - Counseling Testing and Referrals...

Please select a client:

There is no information to display. Please select a client first.

Clients..
Select an existing client using the [Open] button or select the person from the pull-down list. The pull-down list contains the last few clients that you've accessed. For some tasks you will need to actually click on the item to launch the process. Moving the up or down arrow key will not automatically start some of the processes. Press the [New] button to begin the process of entering a new client currently unknown to the system.

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