Locating clients in Epic

By	How	Where	Notes
Account/Business name	Substring search where name contains what you type	Account Name and contacts	Also works for dba's. May be multiple results for same client number.
Last Name, First Name	Begins with what you type	Only Individual Contacts	Will not search business or Account names. Exact match only.
Phone Number	Exact Match	Account and contacts	Enter with area code xxx-xxx-xxxx. **Type number in when phone ringing to pull up account before you even say hello.**
Policy Number	Substring search where number contains what you type		Do not need to type in the whole number.

PS: Remember if you have a long list of items – click the column header to sort the list, then type in the first letter/number of the item you want to find. The list then starts on the letter/number you typed.