Search and Register Step by Step

Search and Register – Previously Registered in Mobius

Anchor Point- Workspace

1. Select **Search and Register** from the Registration section of the **Shortcuts** panel.
2. Enter the search criteria and select **Search**. Results will display in the bottom half of the screen.
3. Review the results list. If a match is found, and the **Registered?** column is **Yes**, select the hyperlink of the person's name.
4. The Person Home Page will display. Modify the record as required.

Search and Register – Not Previously Registered

Anchor Point - Workspace

1. Select **Search and Register** from the Registration section of the **Shortcuts** panel.
2. Enter the search criteria and select **Search**. Results will display in the bottom half of the screen.
3. Review the results list. If no match is displayed, select the **Next** button from the lower right corner. The Step 2 of the registration wizard will display.
4. Complete all Mandatory and Required fields. Select **Save**.
5. The **Person Home Page** will display with the information entered displayed.
6. Modify or add information as required.

Search and Register – Registered in EDB

Anchor Point - Workspace

1. Select **Search and Register** from the Registration section of the **Shortcuts** panel.
2. Enter the search criteria and select **Search**. Results will display in the bottom half of the screen.
3. Review the results list. If a match is found, and the **Registered?** column is **No**, select the checkbox next to the matching name and select **Next**. The Step 2 of the registration wizard will display with information pre-populated from EDB.
4. If this is the correct client select **Save**. The Person Home Page will display.
5. **Update** the information on the Person Home Page as required.