

Client search

Clarity System Basics

How to find records with Client Search



The Client Search function is used to locate client records based on various search criteria. This could include a client's first name, last name, initials, or social security number.

Client search tips

1

Search for a client record

Navigate to the *Search* page by clicking the *Search* button in the top right of the browser window.

2

Search Criteria

Always search the system before adding a new client to avoid duplicates.

3

Review recent client searches

Recently viewed client files appear on the right-hand side of the browser window. These client files can be accessed directly by clicking the client's name.

Name	Date of Birth	SSN
Joe Fabeetz	07/11/1989	Age: 34 5612
John Snow	03/02/1990	Age: 33 0000

Your recent client searches:

- Baratheon Joffrey
- Eddard Stark
- John Snow

Pro Tip



Not locating the client? Try other combinations, including Date of Birth (DoB) or the last four SSNs.