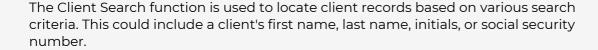
## **Client search**

Clarity System Basics

## How to find records with Client Search





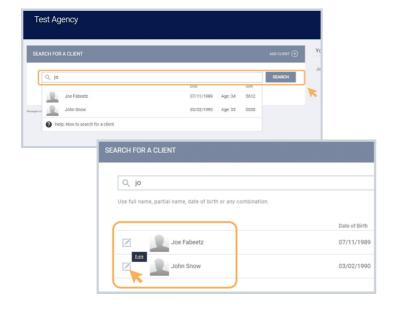
## **Client search tips**

Search for a client record

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

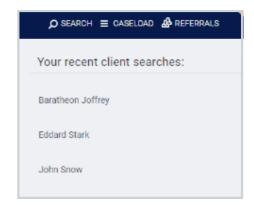
2 Search Criteria

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



## 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.



Pro Tip

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