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

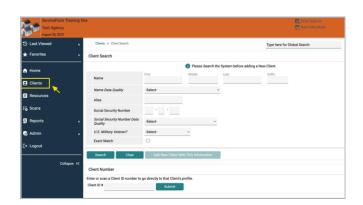# Client search tips

1 ### Search for a client record

To perform a client search, navigate to the menu located on the left side of the screen and click on *Clients*. Then, the *Client Search* screen should appear.

2 ### Search Criteria

- Conduct an **initial search** using the client's last name.

- Conduct a **further search** using the client's first name or a part of the first name.

- Conduct an **advanced search** using client's social security number.

Strategies for an Effective Client Search

(i) Start by searching with the least amount of idetails possible, such as first, initial, and last name or social security number.

(i) If too many results are returned, progressively add more search criteria until the desired client record is located.

Pro Tip

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

Note: This guide covers the essentials of the WSCS System Basics Training. We recommend reviewing the training course for a complete overview.

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