## 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**



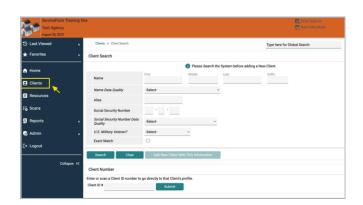
To perform a client search, navigate to the menu located on the left side of the screen and click on *Clients*. Then, the *Client Search* screen should appear.



- 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

- Start by searching with the least amount of idetails possible, such as first, initial, and last name or social security number.
- if too many results are returned, progressively add more search criteria until the desired client record is located.



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**Pro Tip** 

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