

How to search for clients in IWDS

Sample Client: **Justina Thompson**
DOB 6/5/1991
SSN 366-12-3456

- 1) The first search I would do is a partial last name and last 4 SSN:

Search Customers

Last Name: thomp
First Name:
SSN # (Last 4 Digits): 3456
Birth Date:
Filter List of Career Planners by LWA:

- 2) If the results are too large (too many pages), then I would do partial last name, partial first name, and last 4 SSN:

Search Customers

Last Name: thomp
First Name: jus
SSN # (Last 4 Digits): 3456
Birth Date:
Filter List of Career Planners by LWA:

- 3) If you think there has been a legal name change, another option would be Last 4 SSN and Birth Date:

Search Customers

Last Name:
First Name:
SSN # (Last 4 Digits): 3456
Birth Date: 6/5/1991
Filter List of Career Planners by LWA:

- 4) Or partial first name and Last 4 SSN:

Search Customers

Last Name:
First Name: Just
SSN # (Last 4 Digits): 3456
Birth Date:
Filter List of Career Planners by LWA:

If you use all 4 of these search options, you can be 99% sure that the client is not in IWDS. It takes less than 2 minutes.