

Inquiry Tips

Use a multiple identifiers when completing a search for a customer on the Inquire on Individual page.

Do not begin with the Gender or County fields selected, as these parameters limit the search results.

A screenshot of the 'Inquire on Individual' page in a Salesforce-like interface. The page has a header with a search bar and navigation tabs. The main content area contains several input fields for search criteria. The 'Last Name', 'First Name', 'Middle Name', and 'DOB' fields have green checkmarks, indicating they are valid or selected. The 'Client ID', 'State ID', 'Non-Citizen #', and 'County' fields are empty. The 'Gender' field has a red 'X' mark, indicating it is not selected. The 'Suffix' field has a dropdown menu. There is a 'Search' button at the bottom right.

Best practice is to search by:

First Name, Last Name, DOB, SSN

Maiden name – Use to search if the customer declares 'Married'

Dual Last names – Search individually, reversed, and together

Nicknames – For example, Katherine can be listed as Kate, Katie or Kathy

