



Worker Connect

## **MODULE IV:**

# **How do I Search?**

# HOW DO I SEARCH FOR A CLIENT?

The screenshot shows a search interface with four tabs at the top, each with a numbered callout:

- 1** Name (with a person icon)
- 2** Identifier (with a key icon)
- 3** SSN (with a document icon)
- 4** Address (with a location pin icon)

The search form contains the following fields:

- Enter the following (always required)**
  - Last Name:
- Enter one of the following**
  - Age Range:
  - OR
  - Birthdate:
- Additional information (optional)**
  - First Name:
  - Gender:

Buttons at the bottom include:

There are four ways to search for a client in Worker Connect:

1. **Search by Name:** Use this option if you only know the client's name, and either an age range or date of birth.
2. **Search by Identifier:** Use this option if you know the client's unique agency identifier at ACS, DHS, DOF, NYCHA, or HRA.
3. **Search by SSN:** Use this option if you know the client's 9-digit Social Security Number.
4. **Search by Address:** Use this option if you only know a client's address. **NOTE:** This option is not available to all users.

# HOW DO I SEARCH FOR A CLIENT?

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**Each Search type requires you to enter specific information about the client that you are searching for.....**

1

## TO SEARCH BY NAME

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1. Click on the Search by Name tab.
2. Enter the client's **Last Name** (required).

*Note: You must always enter at least the first two letters of the client's last name. A wildcard is a character that may be used in a search term to represent one or more other characters. In Worker Connect, one asterisk (\*) is used right after a character in the wildcard search. For example, if you are looking for a client with a last name that begins with the letters "Jo", you can search: Jo\* to search for all last names beginning with "Jo". The asterisk should be placed next to the last letter (i.e. Jo\*, not J\*o or Jo \*).*

3. Enter either the client's **Age Range** OR **Date of Birth**, but not both (required).

*Note: Enter Date of Birth in MM/DD/YYYY format.*

4. If known, enter the client's **First Name** and select the client's **Gender** (optional).

*Note: If you have only a partial name, enter at least the first two letters followed by an asterisk (\*).*

5. Click **Search**.

# HOW DO I SEARCH FOR A CLIENT?

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**Each Search type requires you to enter specific information about the client that you are searching for.....**

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## TO SEARCH BY IDENTIFIER

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1. Click on the **Search by Identifier** tab.
2. Select the appropriate agency identifier in the **Search By** dropdown field (required):
  - ACS Case Number
  - DOF Docket
  - DHS Individual ID
  - NYCHA Account ID
  - NYCHA Tenant ID
  - HRA CIN
3. Enter the client's unique identifier in the space provided (required).

*Note: The agency identifier must be entered in the correct format. Each agency identifier has a unique format.*

4. Click **Search**.

# HOW DO I SEARCH FOR A CLIENT?

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**Each Search type requires you to enter specific information about the client that you are searching for.....**

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## TO SEARCH BY SSN

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1. Click on the **Search by SSN** tab.

2. Enter the client's **Social Security Number** (required).

*Note: SSN must be entered in the format XXXXXXXXXX (no dashes), where X is a number between 1 and 9.*

3. Enter the client's **First Name** (required).

*Note: If you have only a partial name, enter at least the first two letters followed by an asterisk (\*).*

4. Enter the client's **Last Name** (required).

*Note: If you have only a partial name, enter at least the first two letters followed by an asterisk (\*).*

5. If known, select the client's **Gender** (optional).

6. If known, enter either an **Age Range** OR **Date of Birth**, but not both (optional).

7. Click **Search**.

# HOW DO I SEARCH FOR A CLIENT?

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You may also have rights to search by address, depending on your job function .....

## TO SEARCH BY ADDRESS

1. Click on the Search by Address tab.

2. Enter both the Street **Number** and **Street Name** (required).

- a. **Street Number** is the building/street number. If you are searching for 306 GROVE ST, enter 306 in this field. Remember, this field may include hyphens, white spaces and forward slashes.
- b. **Street Names** can be stored in a number of formats. If you initially do not find the client you are looking for, try searching with a variation of the street name by interchanging the following :

ST and STREET

AV, AVE and AVENUE

TER, TERR and TERRACE

BLVD and BOULEVARD

W and West

E and East

N and North

S and SOUTH

- c. **Street Names** may also include a suffix. For example, when searching for an address such as 123 14<sup>th</sup> Street, enter 123 in the number field and either 14<sup>th</sup> STREET or 14 STREET in the **Street Name** field.

MSN and MISSION, CT and COURT, PL and PLACE, DR and DRIVE

3. If known, enter the **Apartment/Suite** number (optional). The # symbol is not required. **Apartment/Suite** numbers may also include hyphens and whitespaces, therefore, if you are searching for apartment 5C, the following variations may yield different results; '5C', '5-C' and '5 C'
4. To limit the number of results returned, you may also enter the **City** (optional). Again this field may include a number of variations: It may be saved as NEW YORK, but often it lists a specific borough (MANHATTAN, BROOKLYN, BRONX, QUEENS or STATEN ISLAND) as the **City** name. It may also list a specific neighborhood such as CORONA or ELMHURST. Some addresses have an abbreviation stored for the **City**, therefore you may need to search using a common city abbreviation, such as: NYC, NY, BX, BRKLYN or SI, if you are unable to locate a specific client.
5. If known, enter one or more of the following optional fields to narrow your search results: the **ZIP CODE**, **STATE**, **AGE RANGE** and/or **GENDER**.
6. Click **Search**.

**\*\* Please note that when Searching by Address, it may take up to 20 seconds for the results to display on screen\*\***

**\*\*Users cannot search by a registered DHS shelter address\*\***

# HOW DO I SEARCH FOR A CLIENT?

The screenshot shows a search interface with four tabs: Name, Identifier, SSN, and Address. The Name tab is selected. Below the tabs, there are four sections of input fields:

- Enter the following (always required):** A text input field for Last Name.
- Enter one of the following:** Two options: Age Range (a dropdown menu with "-SELECT-" selected) and Birthdate (a text input field with a year selector).
- Additional information (optional):** Two options: First Name (a text input field) and Gender (a dropdown menu with "-SELECT-" selected).

At the bottom, there are two buttons: "Show Advanced Search" (with a gear icon) and "Help". Below these are two more buttons: "Search" (with a magnifying glass icon) and "Clear Search" (with an 'x' icon).

If you know that a client has a record in a particular agency, click on the **Advanced Search** link. The Advanced Search option allows you to select which agencies you want the system to search.

**NOTE:** The Advanced Search can only be used with the Search by Name , Search by SSN or Search by Address options.