

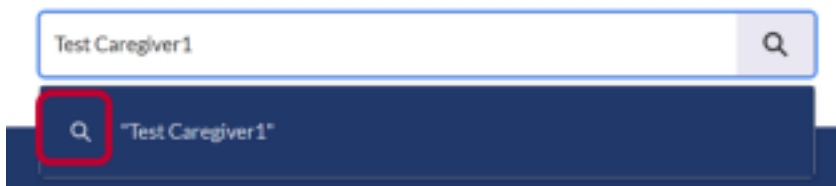
SUDS Tip Sheet: Client Search in the SUDS Portal

The most efficient way to search for clients in the SUDS Portal is to use Global Search and Advanced filters.

1. Enter a client name in the global search field.



2. When no other results appear in the dropdown, click the magnifying glass to the left of the client name.



3. Clicking the magnifying glass opens the advanced search options on the left-hand side of your screen.
4. To find a client, select Clients from the menu.

Search Results

All

Accounts

Caregiver / Care...

Clients

Contacts

I&A

Providers

5. Once you click on Clients, the following options will appear.

Search Results

All

Clients

[Expand List](#)

Refine By

SUDS Client ID

First Name

Last Name

Suffix

Nickname

Client's Region

Birth Date (M/D/YYYY)

6. From here, you can enter a client's first and last name, region, or Birth Date. The SUDS Data Team is working to add Phone Number.

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7. Click the magnifying glass to search for the information entered.

Refine By

SUDS Client ID

First Name

Test



Last Name

Caregiver1



Suffix

Nickname

Client's Region

Choose...



Birth Date (M/D/YYYY)

9/1/1964



8. The client now appears in the search results.

Clients

1 Result • Filtered by First Name, Last Name

SUDS CLIENT ID	CLIENT FULL NAME	FIRST NAME	LAST NAME	SUFFIX	NICKNAME	CLIENT'S REGION	HOME PHONE	CELL PHONE	BIRTH DATE (M/D/YYYY)
Client-00457627	Test Caregiver1	Test	Caregiver1			Region 3A	(202) 333-6666		9/1/1964

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9. You cannot begin a client search from the Refine By menu. If you do, the results will continue to use the original name you entered in the Global Search field.

Clearing the Global Search

Once you enter information into the Global Search field, that term will remain in that field until you enter a new name or open another record.

This is by design from Salesforce - the SUDS Data Team cannot change it.

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