SUDS Tip Sheet: Client Search in the SUDS Portal

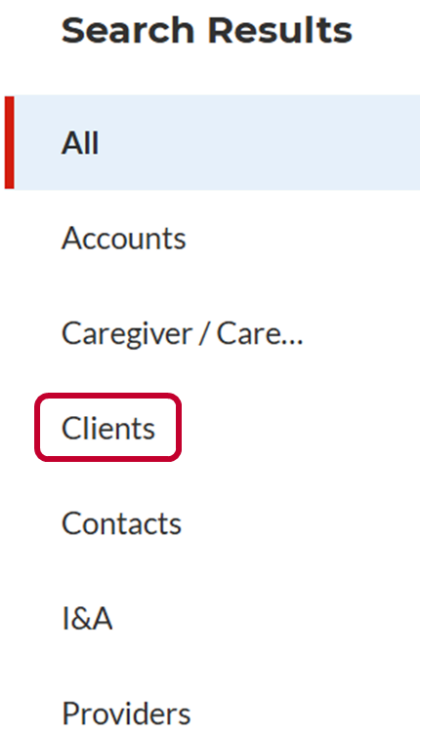
Searching for clients in the SUDS Portal presents a new challenge because users are working with a "blank slate." The SUDS Portal needs time to learn user search patterns before generating meaningful search results.

While the SUDS Portal is learning, using an advanced search is the easiest way to find client records.

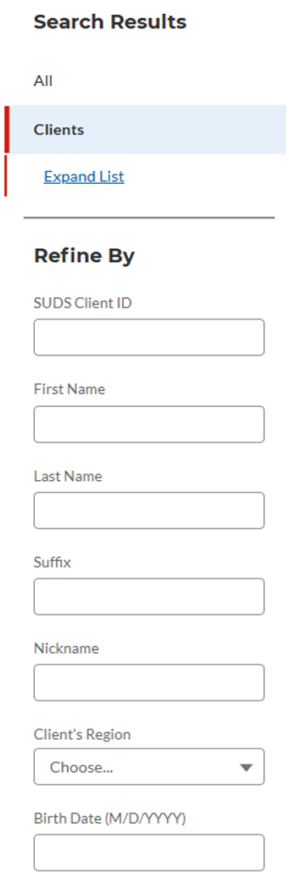
1. Enter a client name in the global search field.

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

3. Clicking on the magnifying glass will open the advanced search options on the left-hand side of your screen.
4. When looking for a client, you want to select Clients from the menu.

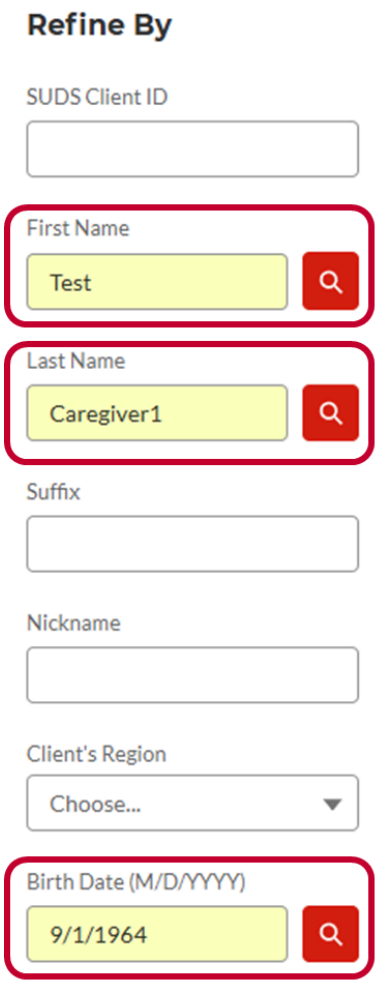


5. Once you click on Clients, the following options will appear.

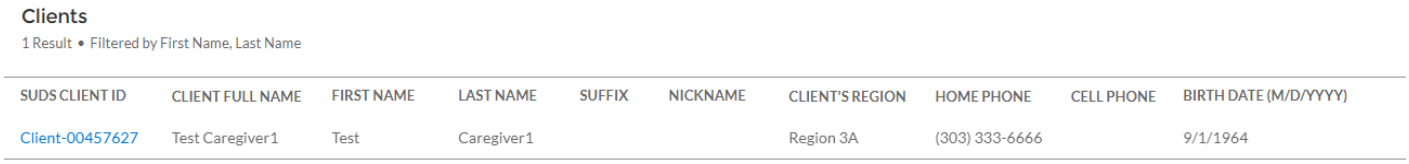


6. From here, you can enter a client's first and last name, region, or Birth Date. The SUDS Data Team is working to add Phone Number.

7. Clicking on the magnifying glass will search for the information entered.



8. Now the client appears in the search results.



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