

SUDS Guide: Finding Clients

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Overview

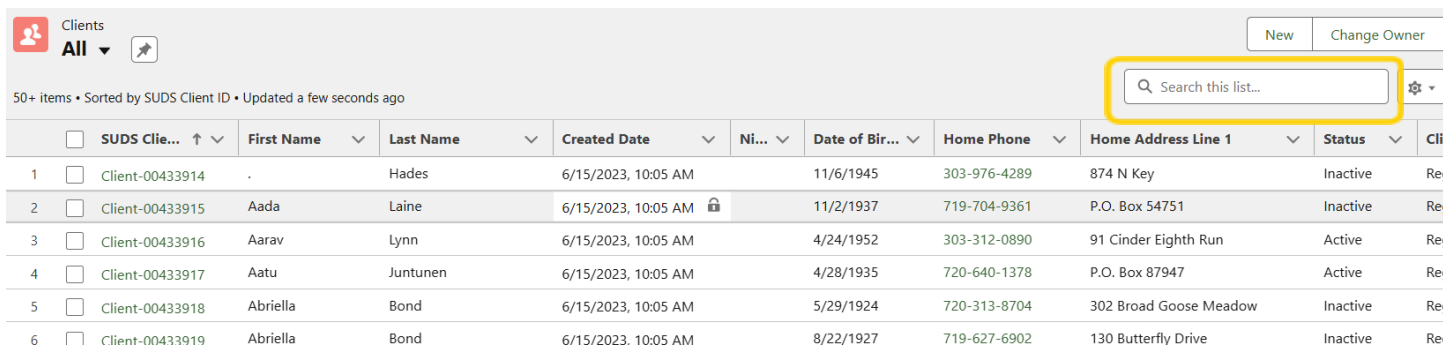
- The SUDS Data Team recognizes that searching for clients in SUDS presents challenges outside our control. Search features are controlled by Salesforce, not SUDS or the Data Team.
- This guide outlines how the SUDS Data Team finds clients and addresses common pitfalls to avoid when looking for clients.

Know Your Search Fields

- There are two ways to search for information in SUDS. The most reliable and comprehensive is Global Search. The second is the List View search, which only searches the selected List View.

List View Search

- The List View Search is located toward the upper right of your Active List View.



	SUDS Client ID	First Name	Last Name	Created Date	Ni...	Date of Bir...	Home Phone	Home Address Line 1	Status	Cli
1	Client-00433914	.	Hades	6/15/2023, 10:05 AM		11/6/1945	303-976-4289	874 N Key	Inactive	Req
2	Client-00433915	Aada	Laine	6/15/2023, 10:05 AM	🔒	11/2/1937	719-704-9361	P.O. Box 54751	Inactive	Req
3	Client-00433916	Aarav	Lynn	6/15/2023, 10:05 AM		4/24/1952	303-312-0890	91 Cinder Eighth Run	Active	Req
4	Client-00433917	Aatu	Juntunen	6/15/2023, 10:05 AM		4/28/1935	720-640-1378	P.O. Box 87947	Active	Req
5	Client-00433918	Abriella	Bond	6/15/2023, 10:05 AM		5/29/1924	720-313-8704	302 Broad Goose Meadow	Inactive	Req
6	Client-00433919	Abriella	Bond	6/15/2023, 10:05 AM		8/22/1927	719-627-6902	130 Butterfly Drive	Inactive	Req

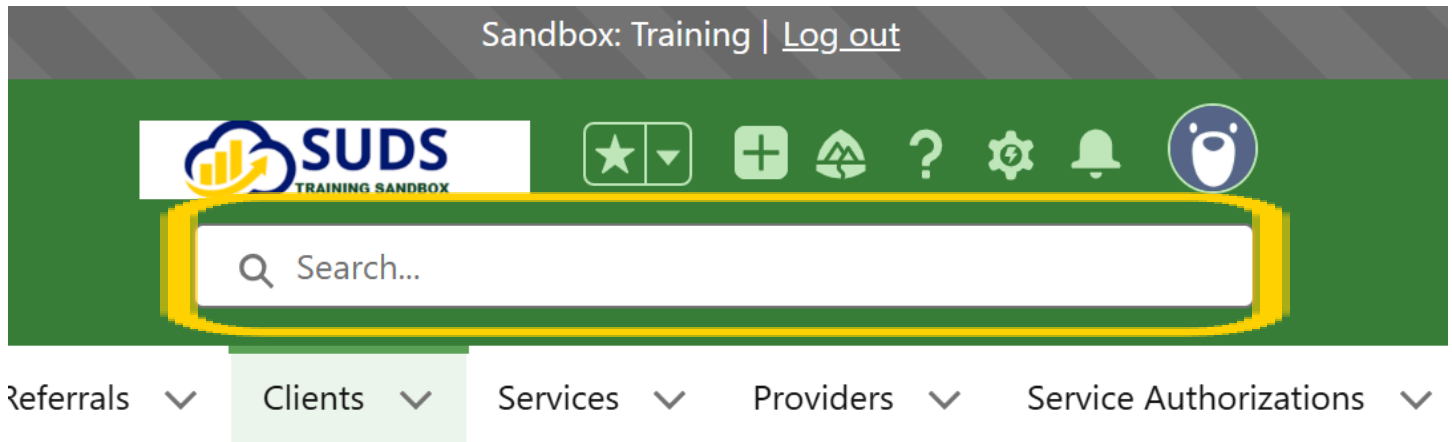
- When using the List View search, only the first 2,000 records are searched.
- SUDS will search for keywords within all the List View records, even if that term is not visible on the List View.



If you search for a keyword in a List View and that word is not in the first 2,000 rows, no results will appear.

Global Search

- The Global Search field is located at the top center portion of the SUDS Home Page.



- When you enter a search term into the Global Search, SUDS will search all searchable fields (some fields in SUDS cannot be searched) in the system for that information.



If you search for the name “Mary,” SUDS will return all records with Mary in ANY field. This means you’ll see records for clients named Mary, clients who live on Maryway Lane, Providers with Mary in their name, or Rosters with Mary in the title.



If you do not have access to certain records, they will not display in your search results.

Using Global Search for Clients

Global Search for clients is faster and more reliable than a List View search, and there are ways to narrow and refine your searches.

Full Name Search

- When searching for a client in the Global Search bar, you can tell the system where to look for the information using the **Search: All** feature.



Search: All ▼ 🔍 Joey Smith

Show more results for "Joey Smith"

- In this example, we are searching for Joey Smith, and we'll tell SUDS to look in Clients by changing the **Search: All** dropdown to **Search: Clients**.



Search: Clients ▼ 🔍 Joey Smith

Show more results for "Joey Smith"

- If you are wondering why no records for Joey Smith automatically appeared, that is because the client record for Joey Smith has not been accessed recently. Any client records that auto-populate only do so when you have accessed the record in the past.
- Since no clients are listed, click “Show more results for ‘Joey Smith’” or press Enter.
- We receive the following result from our search:

Clients						
1 Result						
SUDS Client ID ▼	Client Fu... ▼	First Name ▼	Last Name ▼	Suffix ▼	Nickname ▼	Home Phone ▼
Client-00434060	Joey Smith	Joey	Smith			719-899-2913

Partial Name Search with Added Search Terms

- Sometimes, we do not have all the information we need to find a client in SUDS. In this example, we want to find Joe in SUDS, but we do not know his last name. However, we have his birthday, which is 3/19/1946.

- When we search for “Joe” in the Global Search bar and change **Search: All** to **Search: Clients**, this is the dropdown we see:

Search: Clients ▾

- Client-00434057
Client • Joe
- Client-00434058
Client • Joe
- Client-00434059
Client • joe
- Client-00435535
Client • Joe
- Client-00436440
Client • Joesph

Show more results for "Joe"

- While records auto-populate for us, the results are not helpful. We do not know which Joe is the one we’re searching for, so we click “Show more results for ‘Joe.’”

Refine By

SUDS Client ID

First Name

Last Name

Suffix

Nickname

Home Phone

Birth Date Text

Clients

6 Results • Sorted by Relevance ▾

SUDS Client ID ▾	Client Fu... ▾	First Name ▾	Last Name ▾
Client-00435535	Joe O'Driscoll	Joe	O'Driscoll
Client-00434059	joe test	joe	test
Client-00434058	Joe J jones	Joe	jones
Client-00434057	Joe Blow	Joe	Blow
Client-00436440	Joesph Ernest	Joesph	Ernest
Client-00434060	Joey Smith	Joey	Smith

- Now we can see all the Clients with some form of Joe in their name.
- With our results, a left sidebar has appeared called “**Refine By.**” This is where we can add extra information to narrow our results further in the hopes of finding our Joe.
- Enter Joe’s birthday in the matching field

- Tips for Searching by Birthday
 - Do not use leading zeros (03/19/1946)
 - Do not use a date with dashes (3-19-1946)
 - You can search by year only (1946)
- Once done, click Apply.
- The list of Joes decreases to one - Joey Smith.

What about duplicates?

We have many duplicate clients in SUDS. What does this mean? This means a client had an existing record in SUDS, but a new one was created for the same individual. This means one client has two client records or more. This happens when users struggle to find clients in the system before creating a new client. Duplicates can quickly become problematic for the following reasons:

- We accidentally count two clients when, in actuality, there was just one. It's also possible for service units to be recorded on both client records. This causes significant data quality concerns. How many people are we serving? What are their characteristics? Are duplicates ending up on wait lists?
- Client information may differ between the two records, and we do not know which information is the most accurate or the most recent.

With duplicates, prevention is the best medicine. The following scenarios are probably common in your daily work, and a couple of simple tweaks might mean the difference between finding an existing record and creating a duplicate.

Scenario #1 Different Name Spellings

You are trying to find a client named Jim Lewis. When you enter Jim Lewis in the Global Search bar, you receive no results. You try to search for just Jim, but none of them have a last name close to Lewis. Next, you search for Lewis and receive too many results to be of use.

Follow the following steps to see if you can improve your search results:





1. Use Search: Clients next to the Global Search Bar
2. Jim is commonly used as a replacement for James - try searching for James Lewis.
3. If possible, find another piece of information, like a birthday, nickname, or phone number.
4. If you have more information, use the Refine By sidebar to narrow down your results.

Scenario #2 Different Regions

A client's region may also be used to filter down search results. You would use the same Refine By sidebar shown on page 4. There is a dropdown where you can select your Region. If you are in Region 3A and there are two clients with the same name, but one is in Region 3A, and one is in Region 9, the client listed under Region 3A will be the safest choice.




Clients are universal in SUDS. Everyone can see Client records. Clients are also able to receive services in more than one region. You DO NOT need to create a new client record if you have located a record for Sally Rice in Region 3A and your agency is in Region 3B. If you have corroborating information, like Sally's birthday, phone number, or address, or Sally told you she receives some services in Region 3A, you can update her client record to include Region 3B under Region.

 Client Client-00434204		Nutrition Screening	NSIP
First Name Sally	Last Name Rice	Nickname	Status Inactive
▼ Contact & Demographic Information			
▼ Information			
SUDS Client ID	Client-00434204		
Client's Region 	Region 3A 		
Title			



Open Sally's client record and find the line with "Client's Region." Click the edit pencil. When you do, the field will "open" for changes. Click on Region 3B, then click the right arrow to move Region 3B under Chosen. Click Save. Both Region 3A and Region 3B will be listed.

 Client
Client-00434204

Nutrition Screening

NSIP Eligibility

ADLs

IADL

First Name	Last Name	Nickname	Status
Sally	Rice		Inactive

▼ Contact & Demographic Information

▼ Information

SUDS Client ID

* Client's Region ⓘ

Client-00434204

Available

Region 1

Region 2A

Region 2B

Region 3B

Chosen

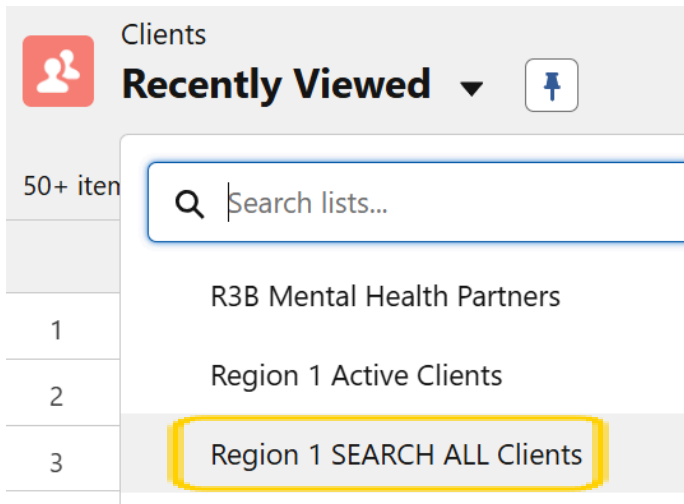
Region 3A

Move selection to Chosen

Scenario #3 List View Searches

Many users have created custom list views based on their agency or the clients they work with the most. While this reduces the number of clients a user sees in SUDS, it also creates the potential for duplicates. If you only search your custom list view, you might miss a client who already has a record in SUDS, especially if they received services in a different region or provider.

To help with client searches using the List View, the SUDS Data Team has created a List View for each region. In this example, "Region 1 SEARCH ALL Clients" will list every client with "Region 1" as their Region on their record.



Advanced Search Techniques

Wildcards

- Use an asterisk (*) to find items that match one or more characters at the middle or end of your search term.



If you search for “Sa*”, your results will include Sarah, Sally, and Sandra.

- Use a question mark (?) to find items that match only one character at the middle or end of your search term.



If you search for “Sa?y”, your results will include Sally, not Sarah or Sandra.

Quotation Marks

- Search for items that match all search terms in the order they are entered.



If you search for Mary Martinez, you will get results for Mary OR Martinez; they won't necessarily be together. By adding quotation marks, SUDS will search for any record that contains “Mary Martinez” where Mary and Martinez are next to each other, like in a Client's Full Name.

Operands

- AND: Searches for keywords that match all of the search terms.



John AND Smith will return results where John and Smith

- AND NOT: Searches for keywords that don't contain the search term.



John AND NOT Smith will return all results containing John, but do not contain Smith.

- OR: Searches for any instance of any or all search terms.



Mike OR Michael will return all results containing those words. If there are no such words in the system, the results will be empty.

Parenthesis



- Parenthesis - This allows you to group search terms together.



If you enter (“Bob Ross”) AND (“Daisy Ross”), your search results will include any records where Bob Ross is together and records where Daisy Ross is together.

SUDS Client Search Quick Tips

- SUDS cannot distinguish between Robert and Bob or between Don and Dawn
- If you don't find the record you're looking for, consider searching for nicknames (Jim or James) or common alternate spellings (Traci/Tracy/Tracey)
- Narrow your search parameter with **Search: Clients** or **Refine By**
- Use wildcards - they are your friend!

 Don't Do This	 Do This Instead
Use dashes to search for a birth date (1-1-1950)	Use a backslash (1/1/1950)
Use leading zeros when searching by birth date (01/01/1950)	Remove leading zeros to search (1/1/1950)
Do not put a wildcard asterisk at the beginning of a search term (*im)	Use wildcards at the end of a search term (Ti*)
Do not search for a phone number without dashes (5555555555)	Use dashes or parentheses when searching by phone number 555-555-5555 or (555) 555-5555

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