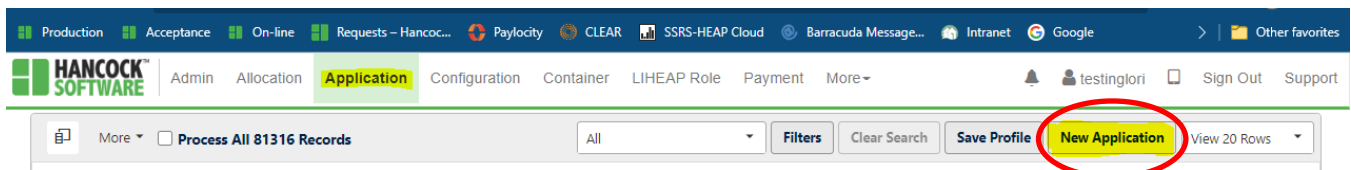


# How To Search for a Client In HEAP Cloud

To search for a client, click on **“New Application”** Button on the Application List Screen.



“Finding Client” box will pop up

You can search by **“Primary Applicant Name”** or

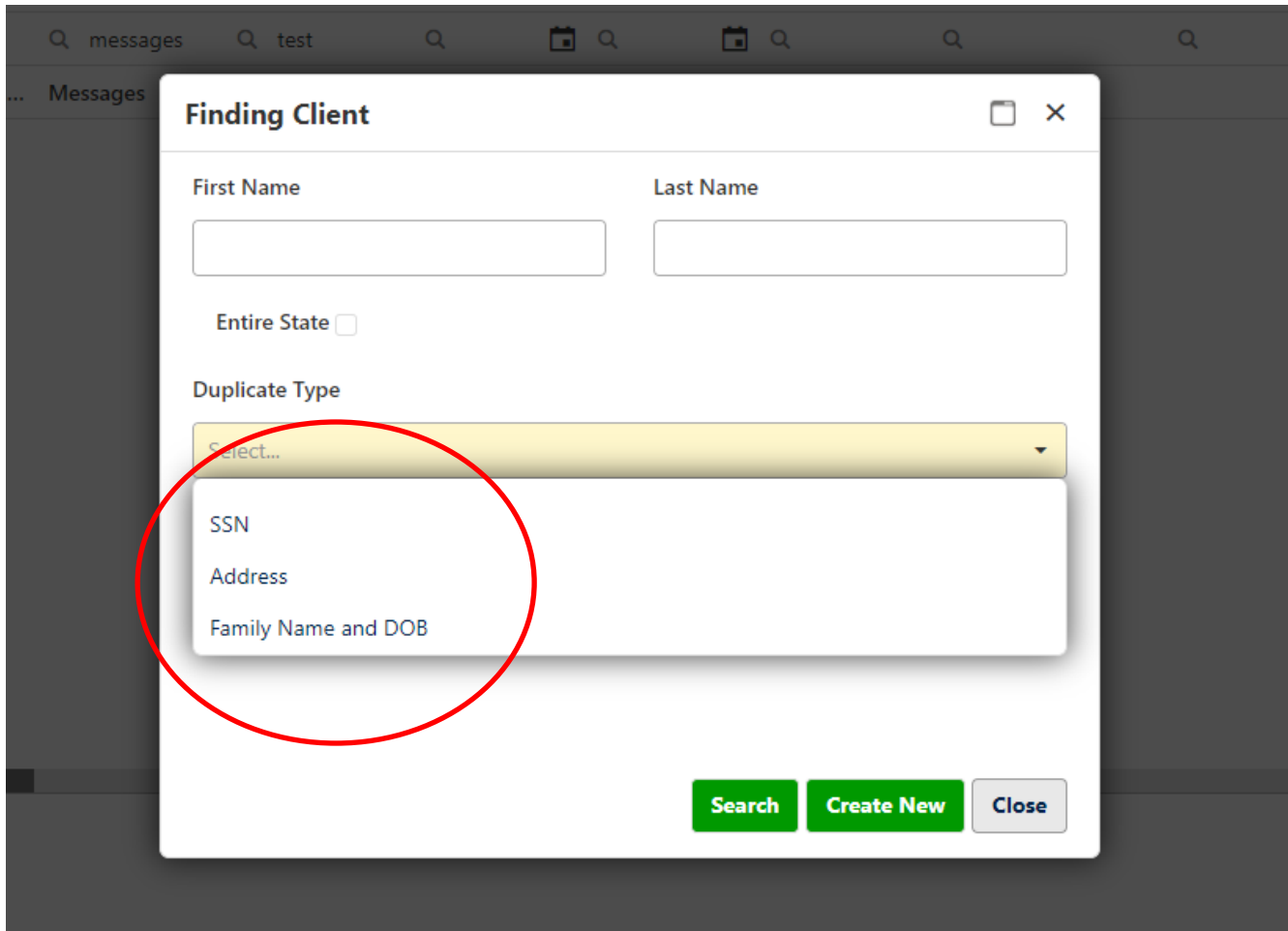
Click on the grey expansion arrow for more options to search.

A screenshot of the 'Finding Client' dialog box. It features two input fields for 'First Name' and 'Last Name', a checkbox for 'Entire State', and a 'Duplicate Type' dropdown menu. The dropdown menu is currently set to 'Select...' and has a small downward-pointing arrow highlighted with a red circle. At the bottom of the dialog, there are three buttons: 'Search' (green), 'Create New' (green), and 'Close' (grey).

There are three different types of criteria to search for an Application.

They are **“SSN”, Address and “Family Name and DOB”**.

**Note:** When searching by SSN, **do not include the name**. Otherwise matches may not come up in the event that the name is not spelled correctly.

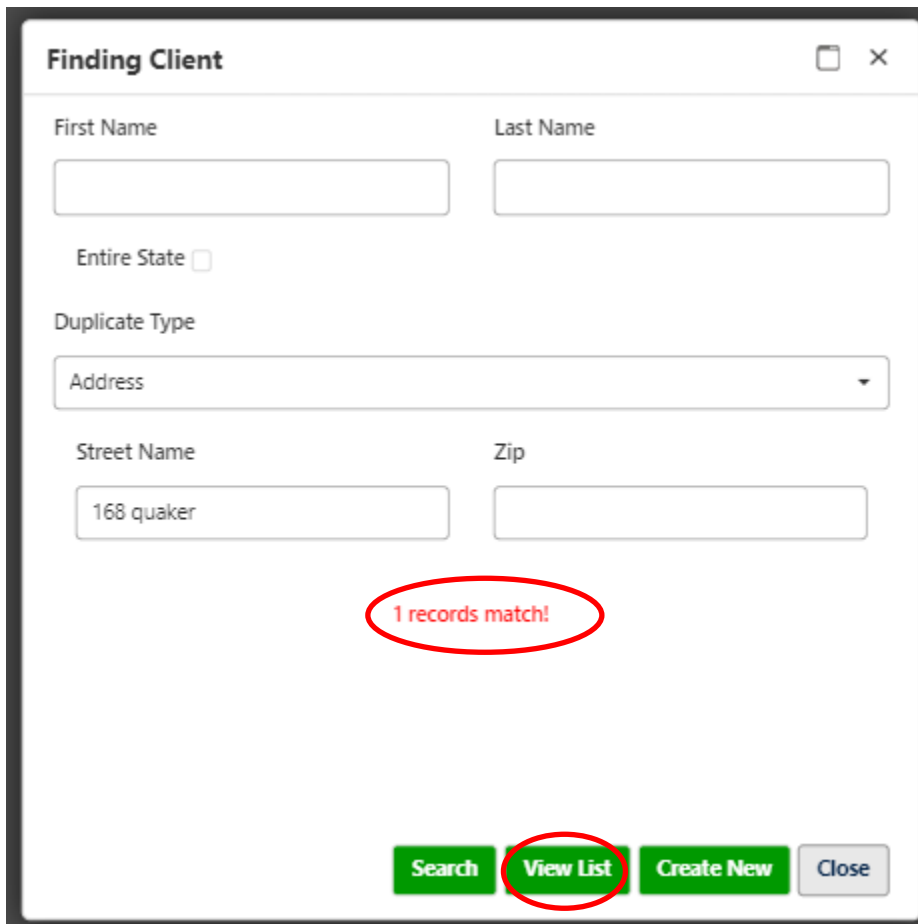


The image shows a software interface with a "Finding Client" dialog box. The dialog box has a title bar with a close button. It contains two input fields for "First Name" and "Last Name", a checkbox for "Entire State", and a "Duplicate Type" dropdown menu. The dropdown menu is open, showing three options: "SSN", "Address", and "Family Name and DOB". The "SSN" option is circled in red. At the bottom of the dialog box, there are three buttons: "Search" (green), "Create New" (green), and "Close" (grey).

Enter the appropriate information based on your search choice.  
Click **“Search”** Button.

When searching action is complete, (if there is a match) a red message will populate the number of matched records.

Click on the **“View List”** Button.



**Finding Client** [Close]

First Name [ ] Last Name [ ]

Entire State

Duplicate Type  
Address [v]

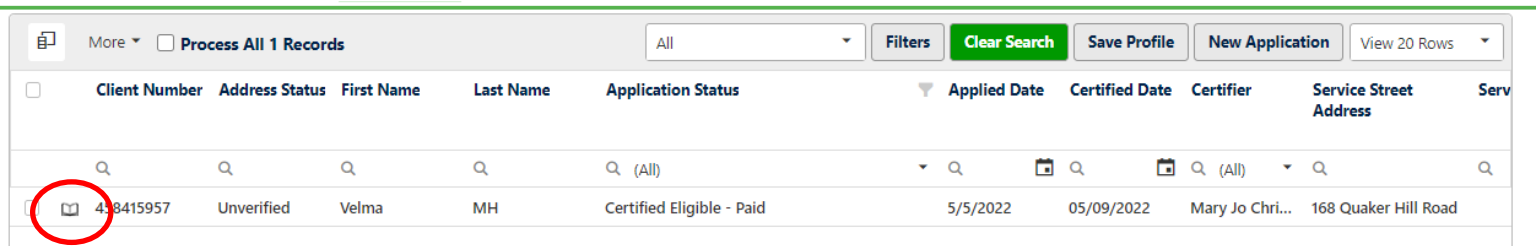
Street Name [ 168 quaker ] Zip [ ]

1 records match!

[ Search ] [ **View List** ] [ Create New ] [ Close ]

The **View List** Button will go back to the application screen and list all of the applications that meet the search criteria.

Double Click on the appropriate application.



The screenshot shows a web application interface with a table of records. The table has the following columns: Client Number, Address Status, First Name, Last Name, Application Status, Applied Date, Certified Date, Certifier, Service Street Address, and Serv. The first row of data is: 438415957, Unverified, Velma, MH, Certified Eligible - Paid, 5/5/2022, 05/09/2022, Mary Jo Chri..., 168 Quaker Hill Road. A red circle highlights the 'View List' button (document icon) in the first row of the table.

Client Number	Address Status	First Name	Last Name	Application Status	Applied Date	Certified Date	Certifier	Service Street Address	Serv
438415957	Unverified	Velma	MH	Certified Eligible - Paid	5/5/2022	05/09/2022	Mary Jo Chri...	168 Quaker Hill Road	