How to Filter (Search) for an Applicant by SSN

For security purposes, the Client Screen in HEAP Cloud does not list Applicant Social Security Numbers (SSN). For this reason, an Applicant’s application cannot be located using the ‘Search’ feature on the client screen.

In order to search for an application using a Household member’s SSN, the ‘Filter’ feature will be used.

Click the ‘Filters’ button at the top of the Client Screen.
The ‘Filters’ pop up box will open.

There is a public filter titled ‘SSN Search’. Highlight this line.

Click ‘Edit’.

The ‘Edit Filter’ pop up box will open.

Where it says ‘<enter a value>’, enter the SSN that you are searching for.
(Note: you can enter the entire SSN or only a partial.)
Click ‘Apply’.

The pop up box will close and you will be taken back to the Client Screen.

Only the Applications containing the SSN (or partial SSN) that you filtered for will be visible.

To open the Application, double click on the appropriate line.

**NOTES:**
- You are able to filter for ANY member of the Household; not only the Primary Applicant.
- After using a filter, click ‘Remove Filter’ to take the filter. Otherwise, you will not see all of the applications in HEAP Cloud.