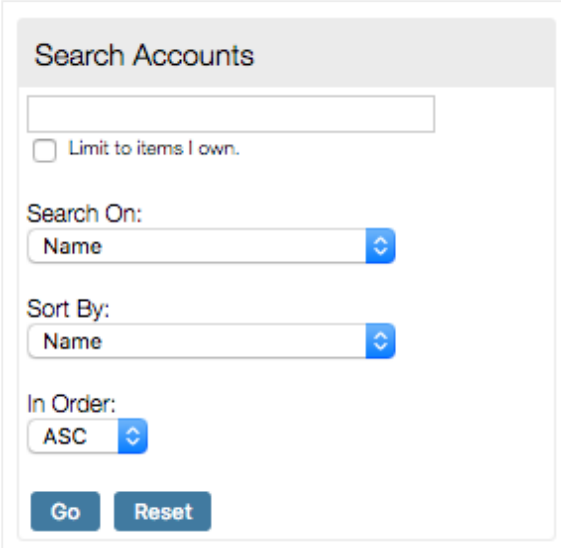


Performing A Search From Views

While searching for records in PlayMaker can be fairly straightforward, there are some best practices that users should keep in mind to maximize their search results.

The search box (pictured below) is found to the left of the record table on the Accounts, Contacts and Referrals pages.

- The text box at the top allows the user to type what they want to search for
- The checkbox below will limit the search to only records that the user is the Shared Owner of
- The *Search On* drop-down lists fields within the record
- The search can then be sorted by the same set of record fields, in either ascending or descending order



The image shows a search interface titled "Search Accounts". It features a text input field at the top. Below it is a checkbox labeled "Limit to items I own." which is currently unchecked. There are three dropdown menus: "Search On:" with "Name" selected, "Sort By:" with "Name" selected, and "In Order:" with "ASC" selected. At the bottom of the form are two buttons: "Go" and "Reset".

Important Reminders when Performing a Search

The search will only take place on the active view.

- If a search is being conducted for an unassigned account, contact or referral, loading the All Accounts (or otherwise appropriate) view would be recommended as the first step.

- For example, if a user is viewing an Admits MTD view, and searches for a patient name on a pending referral, a result will not be shown.

Do not searching for a full name (Account Name, Patient Name, etc.)

- Because the entire name can sometimes limit results, it is recommended to use the most unique part of the name (one word of the account name, a last name, etc.) to have the best chance at finding a match.

Use the % as a wildcard

- If a full name is unknown, or the spelling is unknown, the % symbol can be used to replace the remaining letters.
 - As an example, when searching for a last name like Frederickson, there can be similar spellings, such as Fredrickson or Fredericksen. Searching for *Fred%* in the Last Name field (for a contact) would return any results that start with the letters *Fred*.

Make sure that the appropriate columns are available to view.

- If a view has been customized, and a field is being searched, it's important to have that field visible in the view to validate the search results.
 - As an example, when viewing an Admits MTD view, having the Referral Status showing as a column can help ensure that the referrals are indeed admits and that the view is set up correctly.

Role permissions can play a part in search results.

- Should a referral come in unassigned, rather than assigned to the appropriate user, the Account Executive role will likely be unable to view and search for the unassigned referral. This is based on the role being set up to only view their own referrals, rather than all of the referrals in PlayMaker. In these cases, a user in a manager or administrator role will need to assist in such searches, as well as assist in assigning the contact, account or referral.