



Document Folder - Synergy Job Aid

The *Document Folder* screen allows the user to upload documents relevant to the users Cases or Referrals into Synergy.

Documents

The screenshot displays the 'Document Folder' interface. At the top, there is a table with columns: File Name, Description, Record Type, Document Date, Uploaded Date, Uploaded By, Document ID, and Client. The first row shows 'asq_olive_oil.pdf', 'ASQ for 5/15/18', 'ASQ', '5/15/2018', '5/15/2018', an empty cell, '1', and 'Olive Oyl'. Below the table, there is a 'Show 10 entries' dropdown and pagination links: 'First', 'Previous', '1', 'Next', 'Last'. A button labeled 'Add Document' is located below the table.

The 'Add Document' modal form is open, showing the following fields:

- File Name***: A text input field containing 'Document to Upload.pdf' and a 'Browse' button.
- Record Type***: A dropdown menu with '-Select-' and a checkmark icon.
- Description***: A large text area with a magnifying glass icon.
- Document Date**: A text input field.
- Client Name**: A dropdown menu with '-Select-' and a checkmark icon.
- Uploaded Date ***: A text input field.
- Uploaded By ***: A text input field.

At the bottom of the modal, there are 'Save' and 'Close' buttons.

IMPORTANT NOTE: Documents should not be stored on or saved to personal or public computers as this may be a violation of HIPPA Regulations.

Navigation

- From the **Dashboard**: Locate the desired Case or Referral and click on the *ID* to bring the Case or Referral into focus.
 - Using the Left Navigation panel, click on the **Document Folder** tile.



Uploading a Document

1. Click **Add Document** to open the *Add Document* pop-up.

Document Folder

File Name	Description	Record Type	Document Date	Uploaded Date	Uploaded By	Document ID	Client
asq_olive_oil.pdf	ASQ for 5/15/18	ASQ	5/15/2018	5/15/2018		1	Olive Oyl

Show 10 entries First Previous 1 Next Last

Add Document

2. Click the **Browse** button to locate the desired file. The *Choose File to Upload* dialog box will then open.

Add Document

File Name* **Browse**

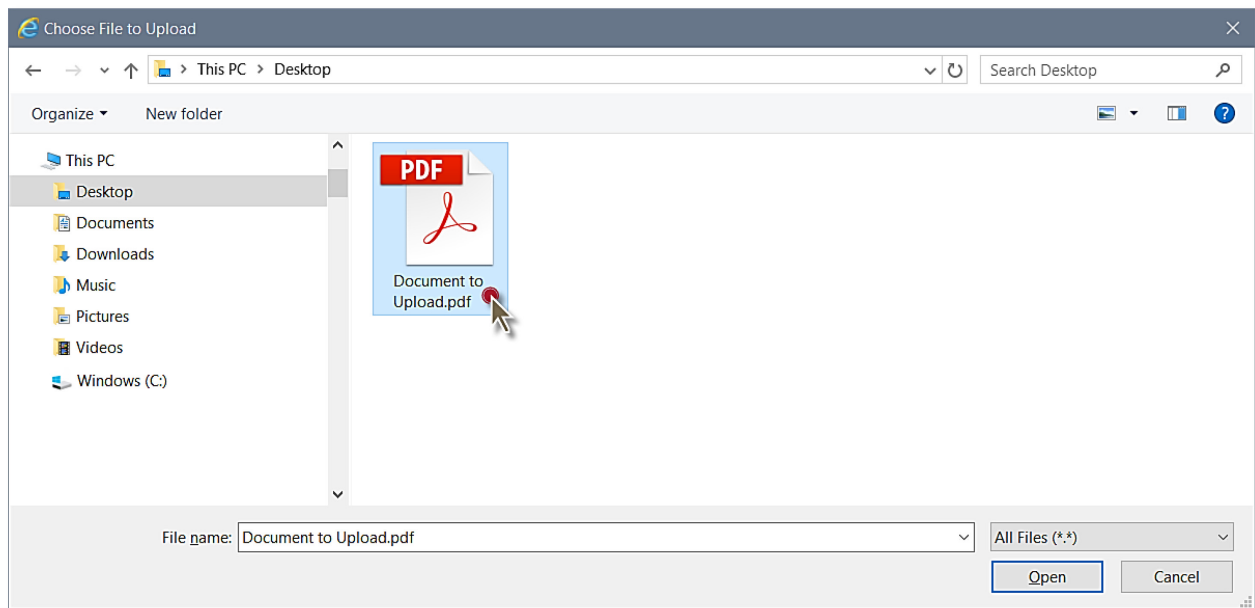
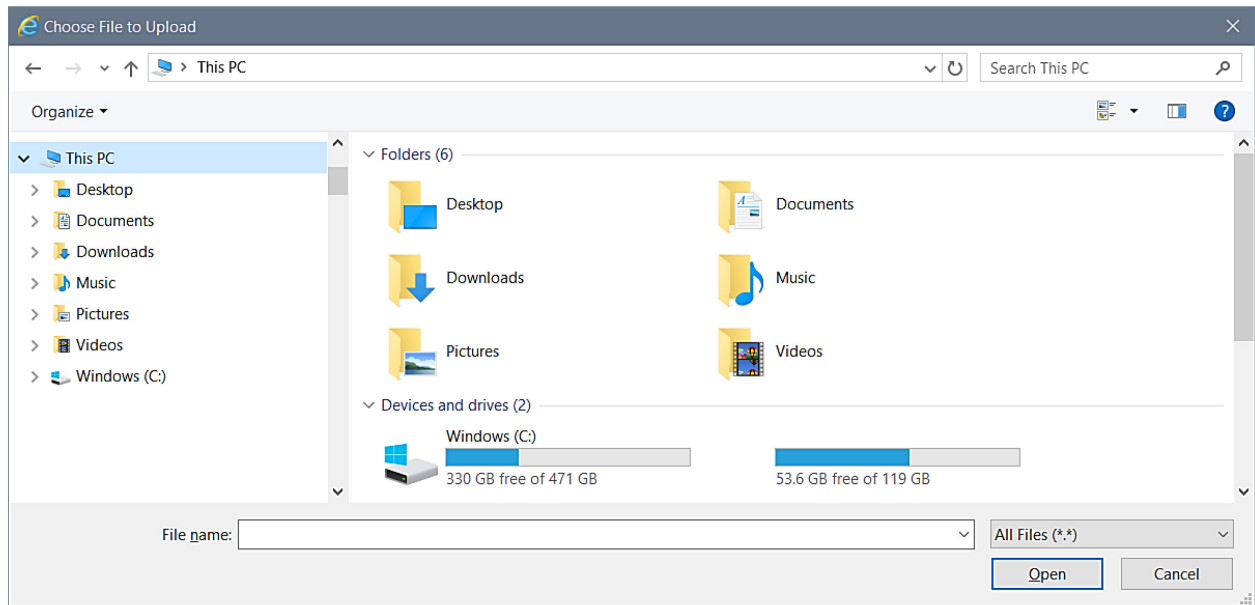
Record Type* Document Date

Description*

Client Name Uploaded Date* Uploaded By*

Save **Close**

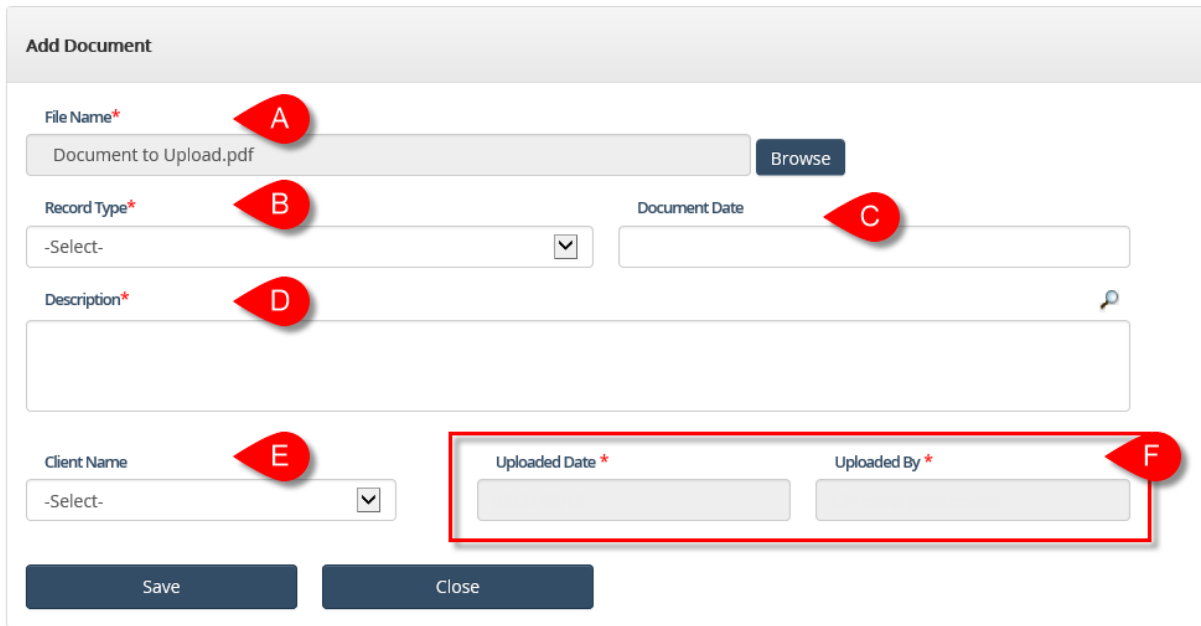
3. Using the *Choose File to Upload* dialog box, navigate to the desired file and click on the file to select it.



- a. Click **Open** to choose the selected file for upload.
- b. Clicking **Cancel** will close the *Choose File to Upload* dialog box without selecting a file.

Saving a Document

1. Completing the *Add Document* pop-up:



The screenshot shows the 'Add Document' pop-up form. It contains the following fields and callouts:

- A:** File Name* (Text field containing 'Document to Upload.pdf', with a 'Browse' button next to it)
- B:** Record Type* (Drop-down menu with '-Select-' selected)
- C:** Document Date (Text field)
- D:** Description* (Text area)
- E:** Client Name (Drop-down menu with '-Select-' selected)
- F:** A red box highlights the 'Uploaded Date *' and 'Uploaded By *' fields, which are read-only.

At the bottom of the form are 'Save' and 'Close' buttons.

- File Name:** The name of the selected file will be displayed automatically in this field.
- Record Type:** From the drop-down select the type of record that best fits the Document.
- Document Date:** Enter the applicable date for the Document.
Example: A letter was sent on 03/01/2018; that date could be used as the Document Date.
- Description:** Enter a brief description of the file that is being uploaded.
- Client Name:** Select the name of the client that the Document applies to. Note: If there is only one Client on the Case or Referral that client's name will be selected automatically.
- Upload Date and Uploaded By:** These fields are read-only and default to the date that the file was uploaded and the name of the logged in user.
- Saving the Document:** Click **Save** to add the document to the *Document Folder* grid.

Deleting Documents:

If a document needs to be deleted you can request this by contacting your Application Specialist with the Case/Referral number and document name.



Accessing or Editing a Document

1. Accessing or Editing a Document:

The screenshot shows a 'Document Folder' interface with a table of documents. Callout A points to the 'File Name' column, and callout B points to the edit icon (pencil) in the 'Client' column.

File Name	Description	Record Type	Document Date	Uploaded Date	Uploaded By	Document ID	Client
asq_olive_oil.pdf	ASQ for 5/15/18	ASQ	5/15/2018	5/15/2018		1	Olive Oyl

Below the table, there is a 'Show 10 entries' dropdown, pagination links (First, Previous, 1, Next, Last), and an 'Add Document' button.

- Opening a Document: Click on the *File Name* in the *Document Folder* grid to open the file.
- Editing a Document: Click on the Edit Icon [] to the right of the Document in the grid to open the *Add Document* pop-up.

The 'Add Document' pop-up form contains the following fields:

- File Name***: Text input with 'Document to Upload.pdf' and a 'Browse' button.
- Record Type***: Dropdown menu with 'ASQ' selected.
- Document Date**: Text input with '05/15/2018'.
- Description***: Text input with 'ASQ for 5/15/18' and a search icon.
- Client Name**: Dropdown menu with 'Olive Oyl' selected.
- Uploaded Date***: Text input with '05/31/2018'.
- Uploaded By***: Text input (empty).

At the bottom are 'Save' and 'Close' buttons.

- The Document Date, Description, and Client Name are the only fields that can be updated after the Document has been uploaded.
- Click to save any updates/changes that have been made.
Clicking will close the pop-up without saving any of the updates/changes.

For more information...

For assistance, please contact your Application Specialists first.

The Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357).
Select Option 2 for the DHS Service Desk. To access iService, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>
or <http://dhsassist.dhs.allegheny.local> for internal users.