



Advanced Search – DHSSSP Job Aid

The *Advanced Search* screen allows the user to search through Referrals and Cases using a variety of search criteria.

Advanced Search screen

▼ Search Criteria

Entity Type

All

▼

Entity ID

Client Last Name

Client First Name

Entity Name

Worker

-Select-

▼

Entity Date From

Entity Date To

Case Status

-Select-

▼

Referral Status

None selected

▼

Provider

None selected

▼

Search

▼ Search Results

Entity Name	Entity Name	Entity ID	Entity Date	Client	Entity Status	Last Contact Date	Case Contacts

Navigation

1. The **Search** button can be found at the top of every screen. Clicking on the **Search** button will navigate the user to the **Search** screen.
 - a. Click on the **Advanced Search** link inside the **Search Criteria** pane.

▼ Search Criteria

Search By

--Select--

▼

-Select-

▼

Search

Search Tips

Advanced Search



Search Criteria

1. The Search Criteria can be used singularly or in combination to filter the results down to the desired case(s) or referral(s).

The screenshot shows a 'Search Criteria' form with the following fields and callouts:

- A**: Entity Type (dropdown menu, currently set to 'All')
- B**: Entity ID (text input field)
- C**: Client Last Name (text input field)
- D**: Client First Name (text input field)
- E**: Entity Name (text input field)
- F**: Worker (dropdown menu, currently set to '-Select-')
- G**: Entity Date From (text input field)
- H**: Case Status (dropdown menu, currently set to '-Select-')
- I**: Referral Status (multi-select dropdown menu, currently set to 'None selected')
- J**: Provider (multi-select dropdown menu, currently set to 'None selected')

The 'Entity Date From' and 'Entity Date To' fields are highlighted with a red box. A 'Search' button is located at the bottom of the form.

- a. The *Entity Type* drop-down defaults to "All" but can be changed to search by "Referral" or "Case" only.
- b. The *Entity ID* is the Case or Referral number.
- c. Type in the *Client Last Name* to search by that criteria.
- d. Type in the *Client First Name* to search by that criteria.
- e. Type in the Case or Referral name in the *Entity Name* field to search by that criteria.
- f. Select the Worker to filter the results to that worker's cases or referrals.
- g. *Entity Date From* and *Entity Date To* allows the search to be filtered down to a date range for the Referral(s) and/or Case(s).
- h. *Case Status* can be filtered to "Open" or "Closed". This criteria can only be used if "All" or "Case" has been selected for Entity Type.
- i. *Referral Status* is a multi-select drop-down. Select all of the desired referral statuses. This criteria can only be used if "All" or "Referral" has been selected for *Entity Type*.

The screenshot shows the 'Referral Status' multi-select dropdown menu. The dropdown is open, showing the following options:

- ☒ Accepted
- ☒ Assigned
- ☐ In Progress
- ☐ Pending
- ☐ Void

The dropdown menu is currently set to '2 selected'.

- j. *Provider*: This multi-select drop-down will default to the name of the user's program and can only be changed if the user has been given access to more than one provider site.

2. Click **Search** to bring up the **Search Results** pane.



Search Results pane

▼ Search Results

Search within Entities:

Entity Type	Entity Name	Entity ID	Entity Date	Client	Entity Status	Last Contact Date	Case Contacts
Case	November	753	6/15/2016	September November	Open	6/19/2016	
Referral		2381	6/13/2016	September November	Accepted		

Show entries

First Previous Next Last

1. The **▼ Search Results** pane contains a **Search within...** field from which the user can filter the grid down to any grid item containing all or part of a word, date, or number.
2. The user can navigate to the Case or Referral from within the **▼ Search Results** pane by clicking on the *Entity Name* or *Entity ID*.
 - a. The user can also navigate directly to the *Case Contacts* screen by clicking on the Contacts Icon [].

NOTE: Search Results will be limited to the provider(s) that the user has access to in Synergy.

For more information...

For assistance, please contact 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>