



Advanced Search – Dragonfly Job Aid

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

Advanced Search

▼ Search Criteria

TypeREFERRAL

ID

Client Last NameSunshine

Client First Name

Keyword

Worker-Select-

Date From

Date To

TA Status-Select-

Referral StatusNone selected

Search

▼ Search Results

Search within Entities:

Type	ID	Client	Status	Referral Date
Referral	56495	Susie Sunshine	Open	9/1/2017

Show 10 entries

FirstPrevious1NextLast

Navigation

- 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.
 - Click on the **Advanced Search** link inside the **Search Criteria** pane.

▼ Search Criteria

Search By--Select-

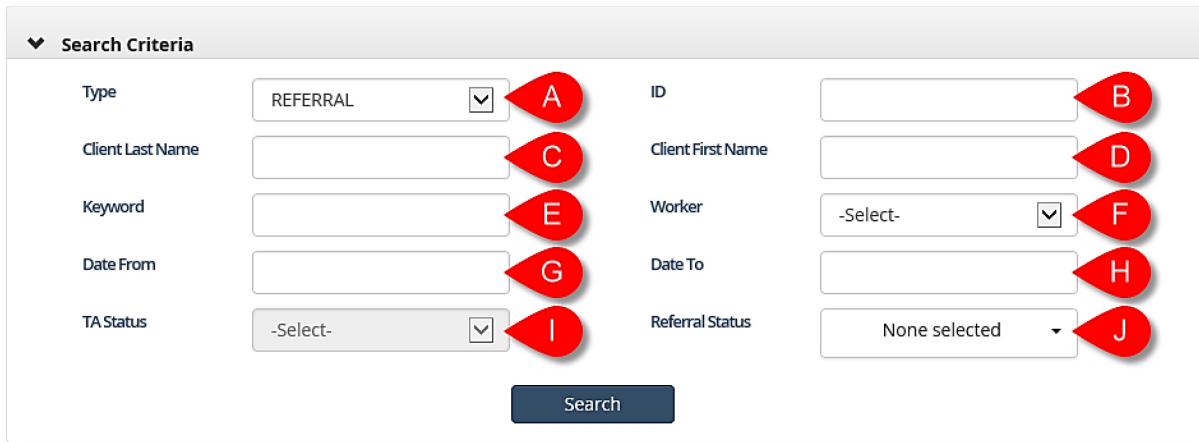
-Select-

Search

Advanced Search

Search Criteria

1. **Search Criteria** pane: 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 the 'Search Criteria' pane with the following fields and callouts:

Field	Callout
Type (dropdown menu showing REFERRAL)	A
ID (text input)	B
Client Last Name (text input)	C
Client First Name (text input)	D
Keyword (text input)	E
Worker (dropdown menu showing -Select-)	F
Date From (text input)	G
Date To (text input)	H
TA Status (dropdown menu showing -Select-)	I
Referral Status (dropdown menu showing None selected)	J

A 'Search' button is located at the bottom center of the pane.

- a. *Type*: This drop-down defaults to "Referral" but can be changed to search by "Referral" or "TA".
- b. *ID*: Enter the Referral number to search by that criteria.
- c. *Client Last Name*: Enter a last name to search by that criteria.
- d. *Client First Name*: Enter a first name to search by that criteria.
- e. *Keyword*: Enter a Keyword to search by that criteria.

TIP: The Keyword option can be used to search Referrals by specific words entered in their Referral Narratives (documented on the Referral Information screen)

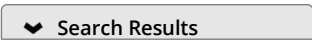
- f. *Worker*: Select a Worker's name from the drop-down to search for that worker's Referrals or Technical Assistance records.
- g. *Date From*: Enter a start date to filter down to a date range for the Referral(s).



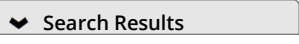
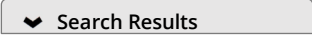
h. **Date To:** Enter a start date to filter down to a date range for the Referral(s).

- i. **TA Status:** The Technical Assistance status can be filtered to "Open" or "Closed" using the drop-down. This criteria can only be used if "TA" been selected for *Type*.
- j. **Referral Status:** The Referral status can be filtered to "Open", "Closed", and/or "Pending" using the multi-select drop-down. This criteria can only be used if "Referral" been selected for *Type*.

A multi-select drop-down menu with a grey header bar labeled "Closed" and a downward arrow. The menu is open, showing three options: "Closed" with a checked checkbox, "Open" with an unchecked checkbox, and "Pending" with an unchecked checkbox. A mouse cursor is pointing at the "Open" option.

2. Click  to bring up the  pane:

The "Search Results" pane is displayed. It features a "Search within Entities:" text box at the top right. Below it is a table with columns: Type, ID, Client, Status, and Referral Date. The table contains one row: Referral, 56495, Susie Sunshine, Open, 9/1/2017. A mouse cursor is hovering over the ID "56495". At the bottom left, there is a "Show" button followed by a dropdown menu set to "10" and the text "entries". At the bottom right, there are navigation buttons: "First", "Previous", "1" (highlighted), "Next", and "Last".

- a. The  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.
- b. The user can navigate to the Referral from within the  pane by clicking on the *ID*.

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>



DEPARTMENT OF HUMAN SERVICES
ALLEGHENY COUNTY, PENNSYLVANIA



DRAGONFLY

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>