



Advanced Search – HCM Job Aid

The *Advanced Search* screen allows the user to search through referrals and cases using a number of different search criteria.

Advanced Search

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

Search

Search Results

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

Total Record Count

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--

Search Tips

-Select-

Search

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')

A red box highlights the 'Entity Date From' and 'Entity Date To' fields. 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 header indicates '2 selected'. The selected options are 'Accepted' and 'Assigned'. The unselected options are 'In Progress', 'Pending', and 'Void'.

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



Search Results pane

Entity Type	Entity Name	Entity ID	Entity Date	Client	Entity Status	Last Contact Date	Case Contacts
Case	November	84	11/23/2015	October November	Open		

Show 10 entries

First Previous 1 Next Last

1. 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.
2. The user can navigate to the Case or Referral from within the 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 [].

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 I-Service, go to: <https://servicedesk.alleghenycounty.us>

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