



Advanced Search – IL Job Aid

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

Advanced Search

Search

▼ Referral Search Criteria

Referral ID

Client Last Name

Sunshine

Client First Name

Client DOB

Client SSN

Legal Gender

Female

▼

Referral Status

-Select-

▼

Date From

Date To

Search

▼ Search Result

Search :

▲ Referral ID

▲ Client

▲ Status

▲ Plan Owner

▲ Referral Date

▲ Last Contact Date

55293

Susie Sunshine

Open

Melanie Sanfilippo

1/27/2017

Show

10

▼

entries

First

Previous

1

Next

Last

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

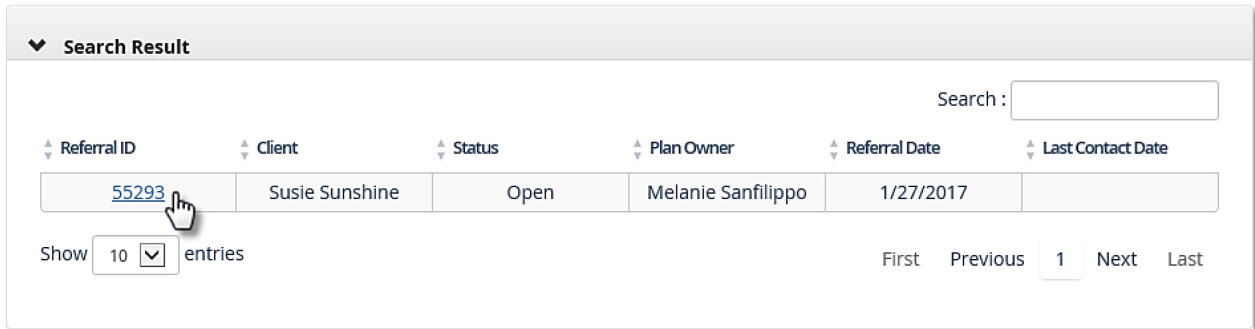
1. **Referral Search Criteria**: The various *Search Criteria* can be used singularly or in combination to filter the results down to the desired Referral(s).

The screenshot shows a web form titled "Referral Search Criteria". It contains several input fields and a search button. Red callout letters A through I point to specific elements: A points to the "Referral ID" text box; B points to the "Client Last Name" text box; C points to the "Client First Name" text box; D points to the "Client DOB" text box; E points to the "Client SSN" text box; F points to the "Legal Gender" dropdown menu; G points to the "Referral Status" dropdown menu; H points to a red box surrounding the "Date From" and "Date To" text boxes; and I points to the "Search" button.

- a. *Referral ID*: If known, enter the IL Synergy Referral ID.
- b. *Client Last Name*: Enter the Youth's *Last Name* to search by that criteria
- c. *Client First Name*: Enter the Youth's *First Name* to search by that criteria.
- d. *Client DOB*: Enter the Youth's date of birth to search by that criteria.
- e. *Client SSN*: Enter the Youth's Social Security Number (SSN) to search by that criteria.
- f. *Legal Gender*: Select the desired Legal Gender to search by.
- g. *Referral Status*: Select the status of the Referral to narrow the *Search Results* down.
- h. *Date From* and *Date To*: Enter a date range to narrow the *Search Results* down.
- i. Click **Search** to populate the **Search Results** pane.



1. **Search Results**: This pane contains a *Search* field from which the user can filter the results down further.



▼ Search Result

Search :

Referral ID	Client	Status	Plan Owner	Referral Date	Last Contact Date
55293	Susie Sunshine	Open	Melanie Sanfilippo	1/27/2017	

Show entries

First Previous 1 Next Last

- a. The user can then navigate directly to a Referral listed in the *Search Results* grid by clicking on the desired Referral's *Referral 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>

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