



Advanced Search – ITM Job Aid

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

Advanced Search

The screenshot displays the 'Advanced Search' interface. It features two main sections: 'Search Criteria' and 'Search Result'. The 'Search Criteria' section includes input fields for 'Client Last Name', 'Client First Name', 'Referral ID', 'Referral Status' (a dropdown menu), 'Referral Date From', and 'Referral Date To'. A 'Search' button is located below these fields. The 'Search Result' section shows a table with columns: 'Referral Date', 'Referral ID', 'First Name', 'Last Name', 'Referred By', 'Referral Reason', 'Source', 'Status', and 'Core Team Feedback'. A search bar is present above the table. Below the table, it indicates 'No data available in table'. At the bottom, there is a 'Show 10 entries' dropdown and pagination links: 'First', 'Previous', 'Next', and 'Last'. The 'Total Record Count: 0' is displayed at the very bottom.

Navigation

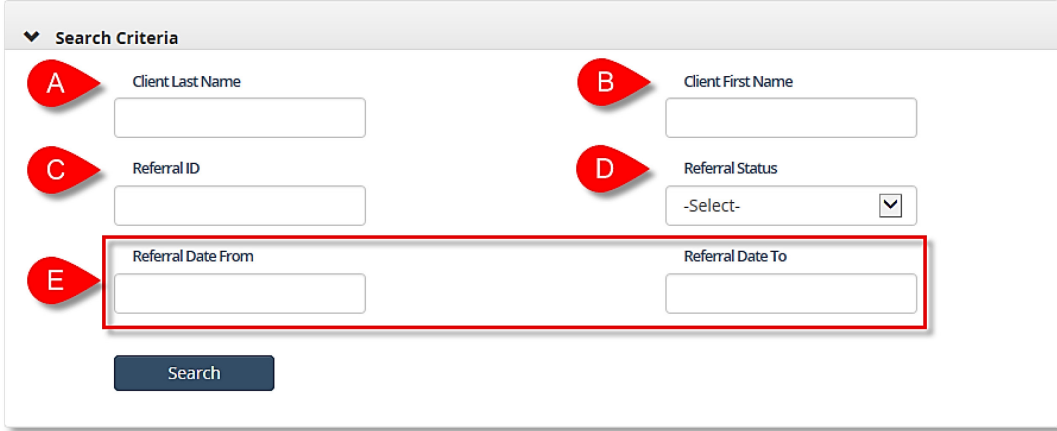
1. The **Search** button can be found at the top of every screen. Clicking on the **Search** button will navigate the user to the **Search** screen.
 - a. Click on the **Advanced Search** link inside the **Search Criteria** pane.

This screenshot shows a close-up of the 'Search Criteria' pane. It includes a 'Search By' dropdown menu with '--Select--' as the selected option. To the right of the dropdown is a 'Search Tips' link. Below the dropdown is a text input field. To the right of the input field is another dropdown menu with '--Select--' and a 'Search' button. At the bottom right, there is a link labeled 'Advanced Search'.



Search Criteria

1. Each field in the  Search Criteria can be used singularly or in combination to filter the Search results down to the desired Referral(s).



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

- A**: Client Last Name (text input)
- B**: Client First Name (text input)
- C**: Referral ID (text input)
- D**: Referral Status (dropdown menu with '-Select-' and a dropdown arrow)
- E**: Referral Date From (text input)
- Referral Date To (text input)
- Search (button)

The 'Referral Date From' and 'Referral Date To' fields are highlighted with a red rectangle.

- Client Last Name*: Enter the Client's last name to search by that criteria.
- Client First Name*: Enter the Client's first name to search by that criteria.
- Referral ID*: Enter the ITM Referral ID to locate that specific Referral.
- Referral Status*: Referral Status can be filtered to "Pending" or "Active".
- Referral Date From* and *Referral Date To*: Use these to locate Referral(s) opened within a specific date range. One or both dates can be used to filter the results.



2. Click  to generate the Search Result(s).

▼ Search Result

Search:

Referral Date	Referral ID	First Name	Last Name	Referred By	Referral Reason	Source	Status	Core Team Feedback
05/17/2016	781	October	November	Jane Smith	Educational/Vocational	ITM	Accepted	

Show entries

First Previous **1** Next Last

- To navigate to a specific Referral click on the *Referral ID* in the *Search Result* grid.
- To view or add feedback while remaining on the *Search* screen click on the feedback icon [] in the *Core Team Feedback* column.

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>