



## Document Tracking and Importing – Provider Job Aid

The *Document Tracking* screen is used by CYF and provider agencies who want to upload information via KIDS into *OnBase*, the document management system. Typically, providers are asked to use this screen by the Provider Relations Department when they have specialized case plans and other evidence-based documentation that needs to be uploaded to the case record.

### Accessing the Document Tracking screen

1. Use the Quick Search or Navigate to the My Active Services screen to bring the Referral or Case into focus.
2. Navigate to the *Document Tracking* screen.
  - a. **Referral > Other > Document Tracking.**
  - b. **Case > Other > Document Tracking.**
3. The *Documents* grid will display a list of all the document records that have been previously uploaded. Highlight the document in the grid to view the details of the document in the *Document Information* section.
4. To upload a new document, complete the *Document Information* section.
  - a. Select a *Document Type*.
    - i. Providers will typically choose one of the following:
      - CYF - Provider - ISP, IHSP, Progress Reports
      - CYF - Provider - Other Documents
      - CYF - Provider Health and Safety Records
      - CYF - Provider Transportation Documents
  - b. Select the *Client*.

- d. Enter the *Document Date*.
- e. Enter any additional notes about the document in the *Comments* field.
- f. Click the **[Save]** button.
  - i. TIP: Upon saving the record, the [Import] button becomes enabled.
- g. Click the [Import] button. The Document Details pop-up is displayed.

### Importing a Document into the File Cabinet

1. Click the **[Browse]** button to locate the document you wish to upload.
  - a. The *Choose File to Upload* pop-up is displayed.
  - b. Navigate through the folders and files on your computer and Network to locate the document file.
  - c. Select the file. The file name will be displayed in the *File Name* field.
  - d. Click on the **[Open]** button. You can also double click on the file.
  - e. The *Choose file to Upload* pop-up will close.
  - f. The pathway to the file you selected will populate in the *File Name* field.
2. Enter a description of the document in *Comments*.
3. Click the **[OK]** button to close the pop-up and to upload the selected document to OnBase via KIDA.
4. A confirmation pop-up is displayed that confirms the document has been stored in the Document Management System. Click the **[OK]** button to remove the pop-up.
  - i. TIP: Only certain files types can be imported. To import a file, the file type must be a .doc, .docs, .pdf, .tif, or .rtf file.

### For more information...

For assistance, please contact the Allegheny County Service Desk at [servicedesk@alleghenycounty.us](mailto:servicedesk@alleghenycounty.us) or 412-350-4357 (Option 2 for DHS). To access the Self Service Tool go to <http://servicedesk.alleghenycounty.us>.

This Job Aid and additional user materials for Provider Users are located on the KIDS Provider Application Support website at <http://s3.amazonaws.com/dhs-application-support/kids-provider.htm>.