



## **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

Departmer Allegheny C	nt of Human Services ounty, Pennsylvania	Key Information and Demographics System
Referral Case Client	Provider FS/OC Reports Portal Admin	Help Logout Case 💌
Case D) Other D) Document Tracking I Organizer Focus History In Focus User Name: Yoland Barber Family Assignment: Entity Type: Case Entity Name: Entity ID:	Make Association   Connections/Associations   Assignment   Supervisor Log   Document Request   Visitation Not Document Tracking  Denotes Required Fields  Documents  Documents  Document Type/ Document Name Imported?	Document Last Updated Date Last Updated By
	Document Information Document Type* Client* Childline Document Date Document Signed By Documents Mailed to	Other Participants
	Select Select Select	
	New Save Import Scan Cancel	

- 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

Document Details			
Date	Document Location*	Document Name*	
User* Find		File Name*	
Document	Description		
ок с	ancel		

- 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 <u>servicedesk@alleghenycounty.us</u> or 412-350-4357 (Option 2 for DHS). To access the Self Service Tool go to <u>http://servicedesk.alleghenycounty.us</u>.

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