



## Advanced Search – MH Residential Job Aid

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

### Search

▼ Search Criteria

Entity Type

All

▼

Entity ID

Client Last Name

Client First Name

Client DOB

Client SSN

Legal Gender

-Select-

▼

Entity Date From

Entity Date To

Case Status

-Select-

▼

Referral Status

None selected





▼

Search

▼ Search Results

Entity Type	Entity ID	Entity Date	Client	Entity Status	Assigned Worker

### Navigation

- From the ACDHS Portal home screen: Click on .
- The  button can be found at the top of every screen. Clicking on the  button will navigate the user to the **Search** screen.
- Click on the **Advanced Search** link inside the  pane.

▼ Search Criteria

Search By

--Select--

▼

-Select-

▼

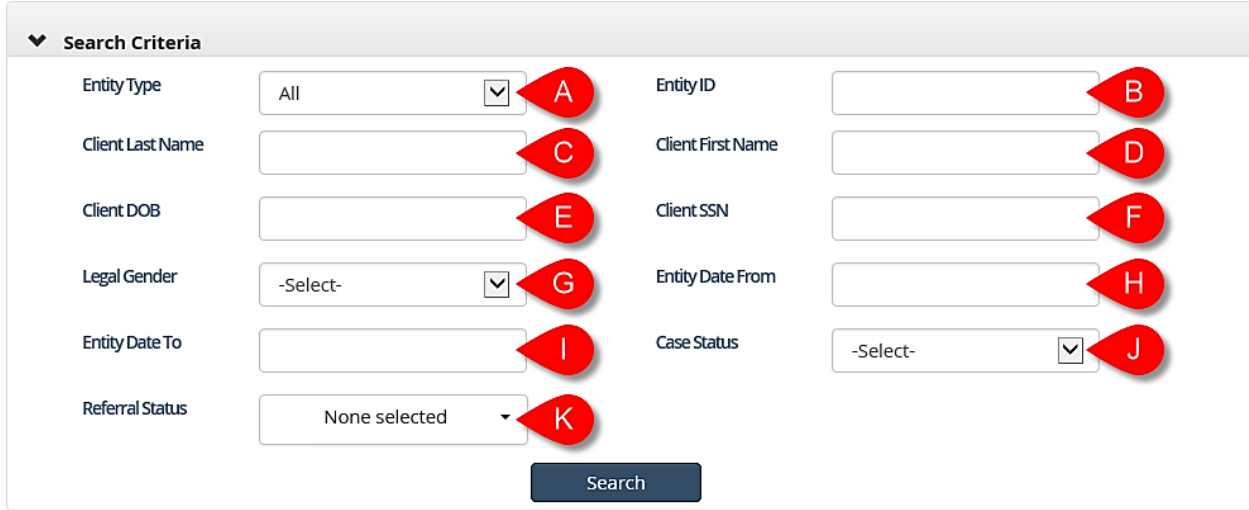
Search

Search Tips

Advanced Search

## Search Criteria

1. **Search Criteria** pane: 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 the 'Search Criteria' pane with the following fields and callouts:

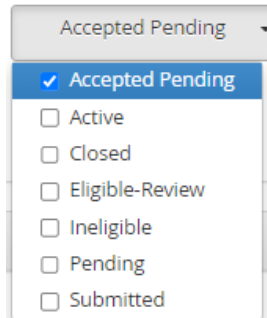
- Entity Type**: A dropdown menu currently set to 'All'. Callout A points to the dropdown arrow.
- Entity ID**: A text input field. Callout B points to the field.
- Client Last Name**: A text input field. Callout C points to the field.
- Client First Name**: A text input field. Callout D points to the field.
- Client DOB**: A text input field. Callout E points to the field.
- Client SSN**: A text input field. Callout F points to the field.
- Legal Gender**: A dropdown menu currently set to '-Select-'. Callout G points to the dropdown arrow.
- Entity Date From**: A text input field. Callout H points to the field.
- Entity Date To**: A text input field. Callout I points to the field.
- Case Status**: A dropdown menu currently set to '-Select-'. Callout J points to the dropdown arrow.
- Referral Status**: A dropdown menu currently set to 'None selected'. Callout K points to the dropdown arrow.

A 'Search' button is located at the bottom center of the pane.

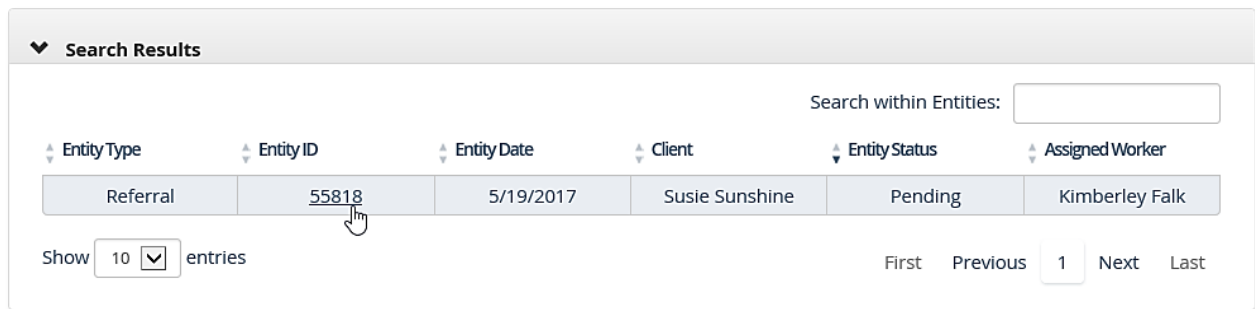
- a. **Entity Type**: This drop-down defaults to "All" but can be changed to search by "Referral" or "Case" only.
- b. **Entity ID**: Enter the Case or Referral number to search by that criteria.
- c. **Client Last Name**: Enter a last name to search by that criteria.
- d. **Client First Name**: Enter a first name to search by that criteria.
- e. **Entity Name**: Enter the Case or Referral name to search by that criteria.
- f. **SSN**: Enter the client's social security number (SSN) to search by that criteria.
- g. **Entity Date From**: Enter a start date to filter down to a date range for the Referral(s) and/or Case(s).
- h. **Entity Date To**: Enter a start date to filter down to a date range for the Referral(s) and/or Case(s).
- i. **Case Status** can be filtered to "Active" or "Discharged". This criteria can only be used if "All" or "Case" has been selected for Entity Type.



- j. *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*.



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



- a. The **Search Results** 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.
- b. The user can navigate to the Case or Referral from within the **Search Results** pane by clicking on the *Entity ID*.

### For more information...

For assistance, please contact the Allegheny County Service Desk at [ServiceDesk@AlleghenyCounty.US](mailto: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> or <http://dhsassist.dhs.allegheny.local> for internal users.