



Advanced Search – YSP Job Aid

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

Advanced Search

The screenshot displays the 'Advanced Search' interface. It features a 'Search Criteria' section with various input fields: Entity Type (dropdown menu set to 'All'), Client Last Name, Entity Name, Entity Date From, Case Status (dropdown menu set to '-Select-'), Entity ID, Client First Name, Worker (dropdown menu set to '-Select-'), Entity Date To, and Referral Status (dropdown menu set to 'None selected'). A 'Search' button is located below these fields. Below the search criteria is a 'Search Results' section containing a table with columns: Entity Name, Entity Name, Entity ID, Entity Date, Client, Entity Status, Last Contact Date, and Case Contacts. The table is currently empty. Below the table is a 'Total Record Count' label.

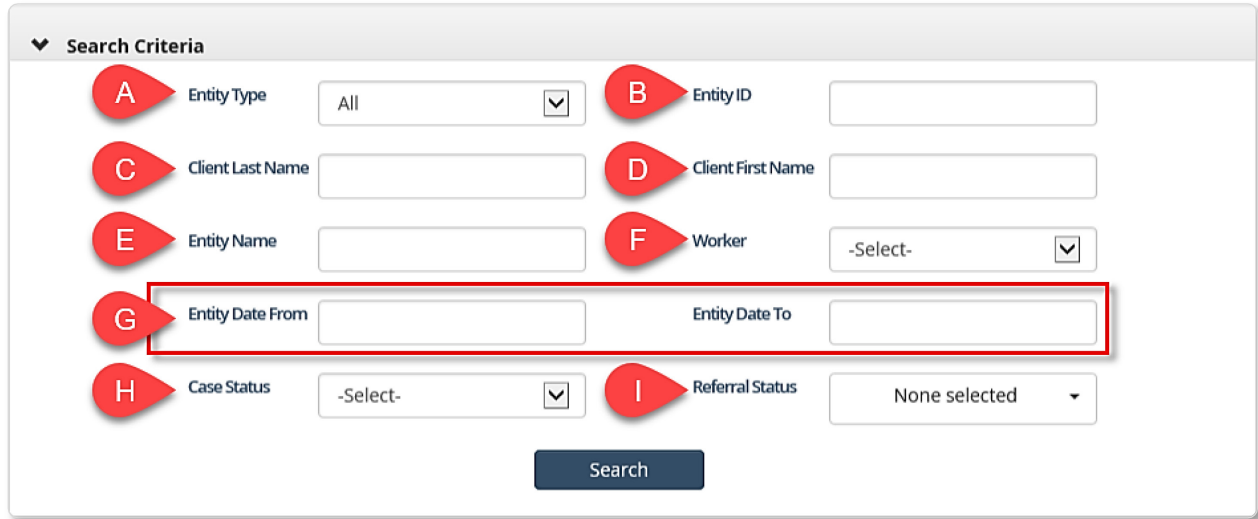
Navigation

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.

The screenshot shows a close-up of the 'Search Criteria' pane. It includes a 'Search By' dropdown menu set to '--Select--'. Below this is a large empty text input field. To the right of the input field is a dropdown menu set to '-Select-' and a blue 'Search' button. In the top right corner of the pane is a link labeled 'Search Tips'. In the bottom right corner is a link labeled 'Advanced Search'.

Search Criteria

- The Search Criteria can be used singularly or in combination to filter the results down to the desired case(s) or referral(s).

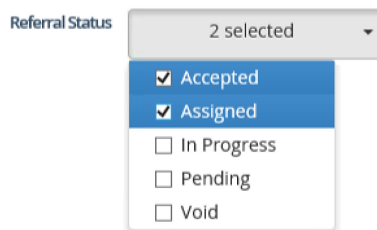


The screenshot shows a 'Search Criteria' form with the following fields and callouts:

- A**: Entity Type (drop-down menu, currently set to 'All')
- B**: Entity ID (text input field)
- C**: Client Last Name (text input field)
- D**: Client First Name (text input field)
- E**: Entity Name (text input field)
- F**: Worker (drop-down menu, currently set to '-Select-')
- G**: Entity Date From (text input field)
- H**: Case Status (drop-down menu, currently set to '-Select-')
- I**: Referral Status (multi-select drop-down menu, currently set to 'None selected')

The 'Entity Date From' and 'Entity Date To' fields are highlighted with a red box. A 'Search' button is located at the bottom of the form.

- The *Entity Type* drop-down defaults to "All" but can be changed to search by "Referral" or "Case" only.
- The *Entity ID* is the Case or Referral number.
- Type in the *Client Last Name* to search by that criteria.
- Type in the *Client First Name* to search by that criteria.
- Type in the Case or Referral name in the *Entity Name* field to search by that criteria.
- Select the *Worker* to filter the results to that worker's cases or referrals.
- Entity Date From* and *Entity Date To* allows the search to be filtered down to a date range for the Referral(s) and/or Case(s).
- Case Status* can be filtered to "Open" or "Closed". This criteria can only be used if "All" or "Case" has been selected for Entity Type.
- 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*.



The screenshot shows the 'Referral Status' multi-select drop-down menu. The header indicates '2 selected'. The selected options are 'Accepted' and 'Assigned'. The unselected options are 'In Progress', 'Pending', and 'Void'.

- Click **Search** to bring up the **Search Results** pane.



Search Results pane

▼ Search Results

Search within Entities:

Entity Type	Entity Name	Entity ID	Entity Date	Client	Entity Status	Last Contact Date	Case Contacts
Case	November	84	11/23/2015	October November	Open		

Show entries

First Previous **1** Next Last

1. 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.
2. The user can navigate to the Case or Referral from within the ▼ Search Results pane by clicking on the *Entity Name* or *Entity ID*.
 - a. The user can also navigate directly to the *Case Contacts* screen by clicking on the Contacts Icon [].

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 I-Service, go to: <https://servicedesk.alleghenycounty.us>

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