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## SSIS Fiscal

Advanced Service Arrangement Searches in SSIS

December 2022

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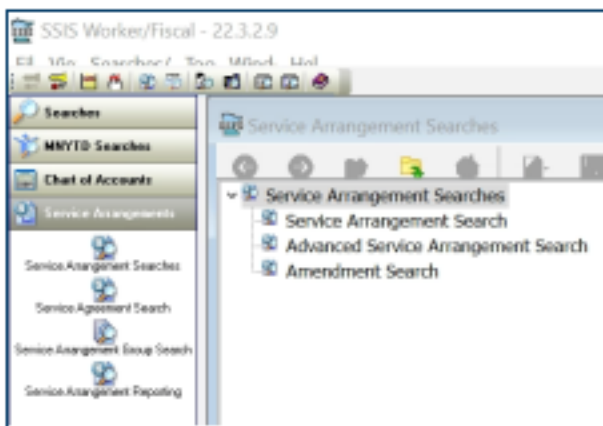


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## Advanced Service Arrangement Searches in SSIS

Advanced Service Arrangement Search enables users to find specific Service Arrangements and utilize Advanced Search Filters by selecting one, several, or all available filters when completing a Service Arrangement search in SSIS.

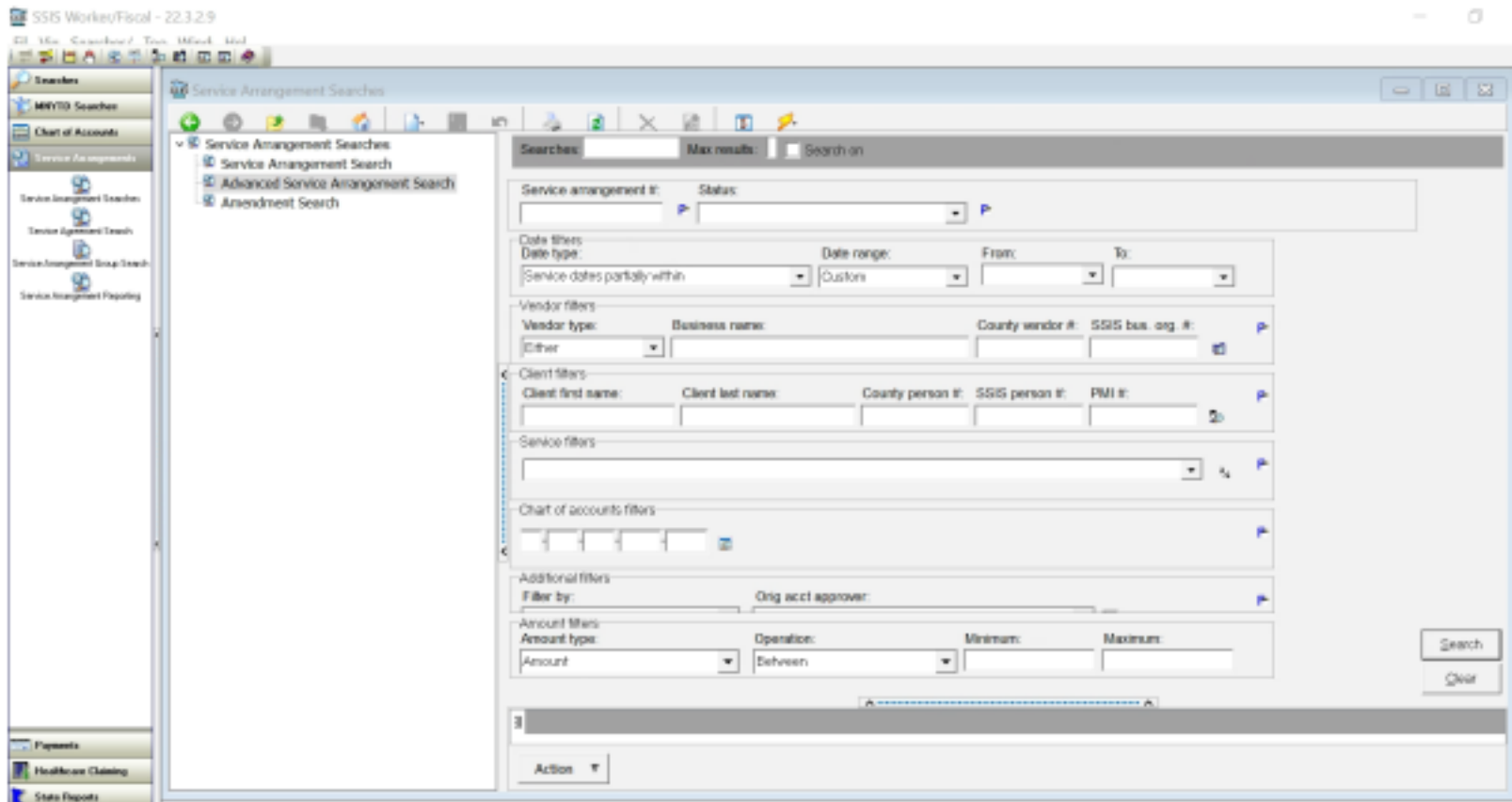
Advanced Search provides the ability to customize a search or a report, as well as display additional columns in a Service Arrangements Grid. This feature can be used to aid local social service agencies in tracking where service dollars are being spent on a weekly, monthly, quarterly, and/or annual basis.



*The Service Arrangement Advanced Search Screen in SSIS*

### **To access the Advanced Service Arrangement Search**

1. To access **Service Arrangement Search**
  - Click **Service Arrangements** on the Task Panel and select **Service Arrangement Searches**, or
  - Access **Searches/Logs** on the Application toolbar and click **Service Arrangements > Service Arrangement Searches**
2. To access **Advanced Service Arrangement Search**
  - Click the **Advanced Service Arrangement Search** tab, or
  - Select the **Advanced Service Arrangement Search** in the Tree View



*The Advanced Service Arrangement Search Tree view and Detail Panel in SSIS*

The Advanced Search Filter button displays a customized dialog for the search criteria field or group of fields. The table below describes the option buttons on the Advanced Search dialogs. All of the Advanced Search Filters have an Apply, Clear, and Cancel button. The Add, Remove, and Select buttons display on some of the Advanced Search Filters.




*The Advanced Filter button in SSIS*

Button	Description	Shortcut key
Apply	Saves the selections and returns to the search	Alt+P
Clear	Clears all selections in the advanced search filter dialog	Alt+C
Cancel	Cancel any changes and returns to the search	Esc or Alt+N
Add	Adds the selection to the "Filters to be applied"	Alt+A
Remove	Removes the highlighted entry in "Filters to be applied"	Alt+R

Select All	Selects all items in the list box	Alt+A or Ctrl+A
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**To use the Advanced Search Filter:**

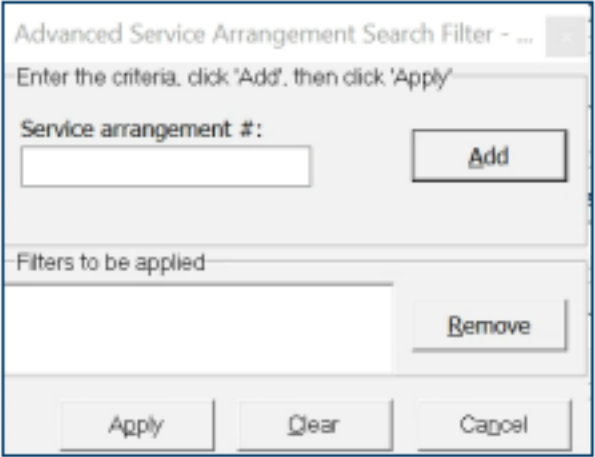
1. Click the **Advanced Search Filter** button 
2. Make one or more selections
3. Click **Apply**

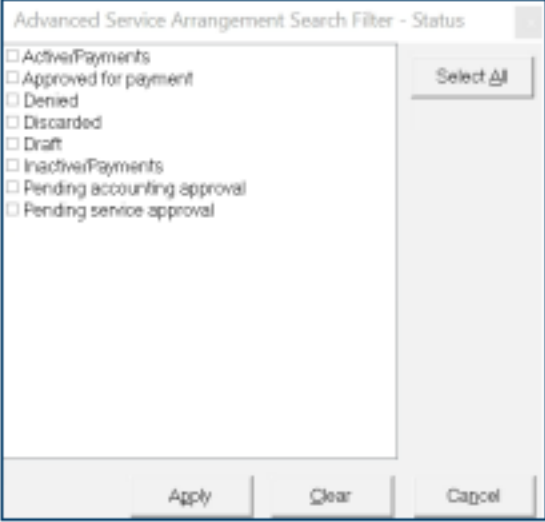
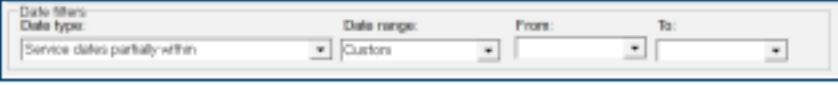
Add additional selections by clicking the corresponding boxes or entering free text. To select all search filters click Select All. To clear the search parameters click Clear.

Complete numbers must be entered in a number field or the search will not return results. For example, PMI# is an eight digit field so eight digits must be entered or no results will display.

In some Advanced Search filters an astrisk (\*) can be utilized to conduct a wild card search. A wild card search allows additional search criteria by using \* to replace the beginning or end of a search name. This is useful when searching for data with unusual or unknown spelling. Advanced Search filters include:

- Vendor filter - Business name selection
- Client filter – Client first name
- Client filter – Client last name
- Service filter – 3 digit service code
- Chart of account filter.

Advanced Service Arrangement Search Filters	Available Options for Search Filters
	<p><b>Advanced Service Arrangement Search Filter: Service Arrangement #</b></p> <p>Worker can enter a Service Arrangement # and click Add to search by more than one Service Arrangement # per search.</p> <p>If a Service Arrangement # is entered all other search criteria are ignored.</p>

	<p><b>Advanced Service Arrangement Search Filter: Status</b></p> <p>Returns Service Arrangements with one of the selected Service Arrangement Statuses. Worker can select one or many Status search options.</p>
	<p><b>Advanced Service Arrangement Search Filter: Paying County</b></p> <p>This filter returns Service Arrangements for one or more of the selected agencies.</p> <p>The Paying County field and Advanced Search filter only display for agencies that are part of a region in SSIS Worker/Fiscal. Only displays for Lincoln, Lyon, Murray, Faribault and Martin.</p>
	<p><b>Advanced Service Arrangement Search Filter: Date</b></p> <p>The Date filters section does not have an Advanced filter attached. Select the date range and the available date fields to search by:</p> <ul style="list-style-type: none"> <li>• If <b>Service dates completely within</b> is selected then the search returns Service Arrangements that start and end within in the date range selected.</li> <li>• If <b>Service dates partially within</b> is selected then the search returns Service Arrangements that start and end within the date range, those that end in the date range, those that start within the date range and those that are active within in the date range (still current).</li> </ul>

### Advanced Service Arrangement Search Filter: Vendor

Workers can select what to filter by, filter criteria, select search options, click the Add button and then click the Apply button.

- Searches filtered by more than one Business Name, County vendor #, and/or SSIS bus. org. #.
- Search filter criteria includes Service Vendor, Payee Vendor, or Either.
- The Business name field allows for a search based upon the free text entry of one business name.
- Search Options include Exact match, Starts with, Contains, and Soundex.

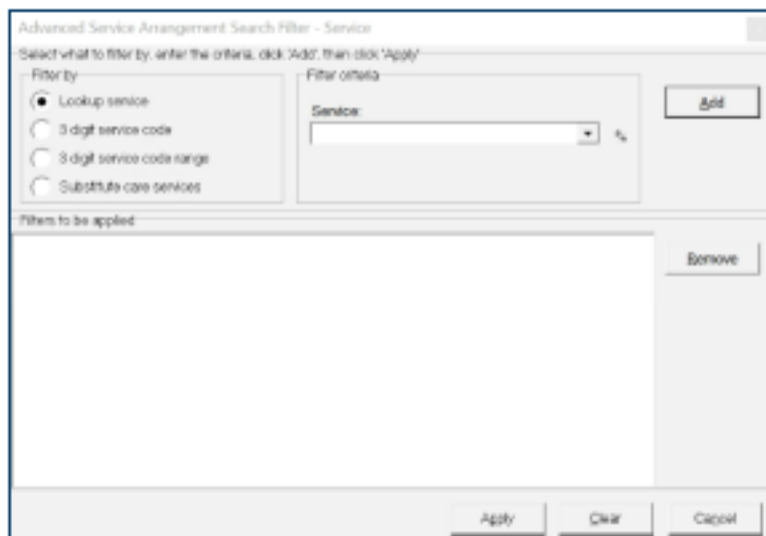
If a SSIS bus org # is entered, all other search criteria in the Vendor filter is ignored.

### Advanced Service Arrangement Search Filter: Client

Workers can select what to Filter by, enter the criteria, click add, and then apply.

- Searches my filtered by more than one Client name, County person #, and/or SSIS Person #
- Searches can be searched by more than one criteria to include Client first name and Client last name
- Search Options include Exact match, Starts with (default), Contains, and Soundex.

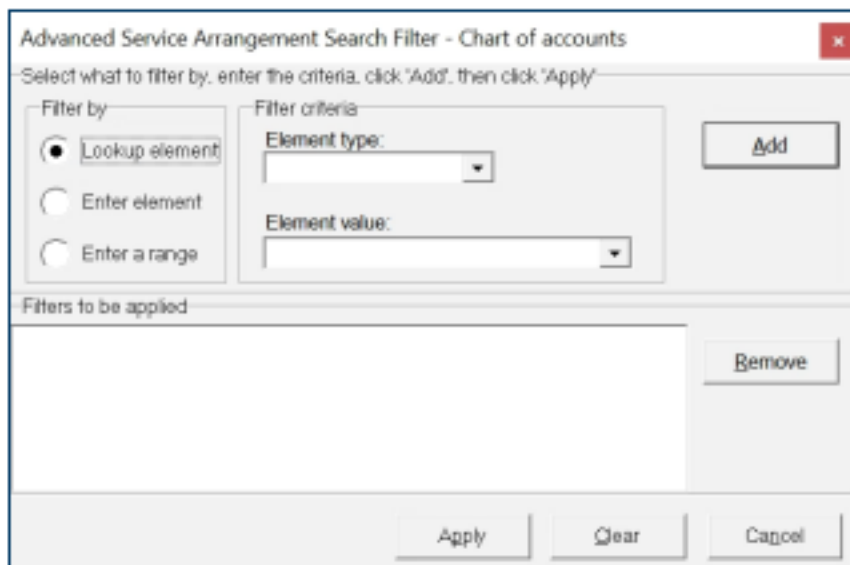
If a SSIS Person # is entered, all other search criteria in the Client filter is ignored.



### Advanced Service Arrangement Search Filter: Service

Allows for the selection of one or more of the Service filters.

This filter allows for the selection of one or more Service filter BRASS codes to be added and simultaneously searched. By selecting the Service, the 3 digit Service code, the 3 digit service code range or the Substitute care services.

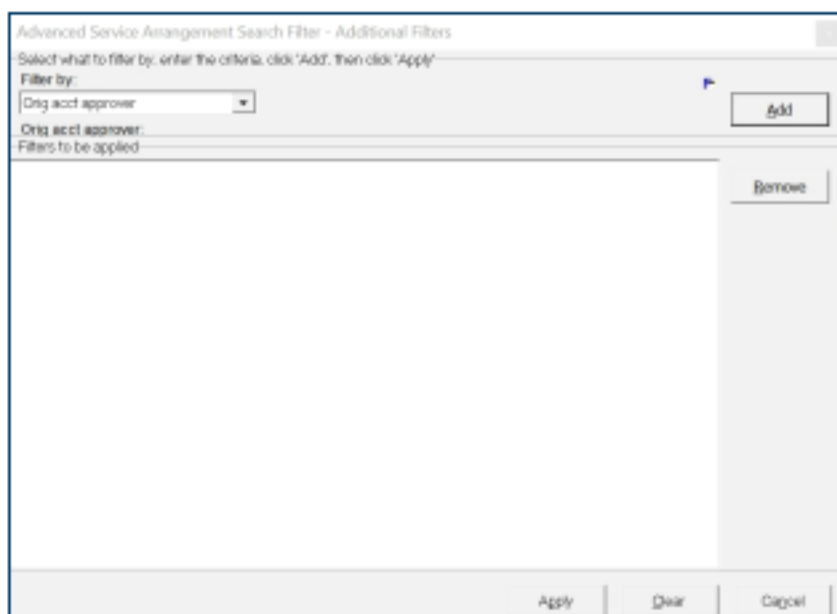


### Advanced Service Arrangement Search Filter: Chart of Accounts

The Advanced Chart of Accounts filter allows for the selection of Filter criteria based upon the selection of three separate filters:

- Lookup element types also allows for the selection of an Element value in the drop-down menu
- Enter Element types also allows for the selection of an Element value within a free-text field

Enter a range type also allows for the selection of an Element value within two free text entry fields labeled From and Through.



### Advanced Service Arrangement Search Filter: Additional Filters

The Additional Filters screen is used to further narrow the search options.

Additional search fields become available based upon what is selected in the Filter by field.

- If **Arrangement group #** is selected the search returns Service Arrangements with the applied Arrangement Group ID(s).
- If **Contract Number** is selected the search returns Service Arrangements with the applied Contract Number(s).
- If **County contact** is selected the search returns Service Arrangements where the

County Contact is one of the applied users.

- The Active workers only checkbox limits the drop-down menu to only SSIS users that are active.
- When **HCPCS/modifiers** is selected the search returns Service Arrangements with the applied HCPCS/modifier(s).
- If **License #** is selected the search returns Service Arrangements with the applied License number(s).
- If **Orig acct approver** is selected the search returns Service Arrangements where the Accounting approver on the original Service arrangement amendment record is one of the applied user(s).
  - The Active workers only checkbox limits the drop-down menu to only SSIS users that are active.
- If the **Orig svc approver** is selected the search returns Service Arrangements where the Service Approver on the original Service Arrangement Amendment record is one of the applied user(s).
  - The Active workers only checkbox limits the drop-down menu to only SSIS users that are active.
- If **Primary worker** is selected the search returns Service Arrangements for all the Workgroups where the Primary Worker for the workgroup is one of the applied name(s).
  - The Active workers only checkbox limits the drop-down menu to only SSIS users that are active.
- When **Service Agreement #** is selected the search returns Service Arrangements with the applied Service Agreement ID(s).
- If **Special cost code** is selected the search returns Service Arrangements with the applied Special Cost Code(s).
- When **SSIS WG #** is selected the search returns Service Arrangements with the applied SSIS Workgroup number(s).

	<p><b>Amount Filters</b></p> <p>Can be applied by the Amount type and by minimum and maximum amounts</p>
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**Advanced Service Arrangement Search Screen with Advanced Search Filters Utilized**

Searches:  Max results:   Search on open

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Service arrangement #:  Status:

Date filters  
Date type:  Date range:  From:  To:

Vendor filters  
Payee or service vendor where "Business name" starts with "bear"  
Payee or service vendor where "County vendor #" equal to "123456789"

Client filters  
"Client name" starting with "avery" "riley"  
"County person #" equal to "12345"

Service filters  
"Service" equal to "107 - Child welfare assessment"  
"Service" equal to "109 - Concurrent planning assessment"

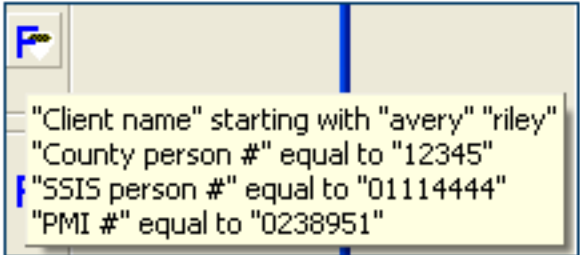
Chart of accounts filters  
"Fund" equal to "07"  
"Dept" equal to "997"

Additional filters  
"Orig acct approver" equal to "Aaa, A Training"  
"Contract number" equal to "123456789"

Amount filters  
Amount type:  Operation:  Minimum:  Maximum:

Once selections have been made within the Advanced Service Arrangement Search Filters, those filters display in blue and are underlined. The display is based on the available space in that search field. Each search field displays the selected filter options with up and down arrows and/or a listing separated by commas.

**Advanced Service Arrangement Search Filter Fly-Over Display**



When the cursor rests on the Advanced Service Arrangement Search filter button, a fly-over is created which displays in a list all five Service filter selections in their entirety.

***To complete an Advanced Service Arrangement Search:***

1. Using **Advanced Service Arrangement Filters** enter search information
2. Click **Search** button
3. The **Advanced Service Arrangement Search Results** display in the grid

Advanced Service Arrangement Search also includes additional grid options to further customize what displays.

***To customize the results on the Advanced Service Arrangement Search screen:***

1. Right-click within the grid
2. Select **Grid Options**
3. Select **Choose Columns**
4. The **Customize** box displays
5. Click and drag a column header into the grid where you wish it to be located
6. Repeat steps until the desired columns display
7. Close **Customize** box