



Document Folder – ITM Job Aid

The *Document Folder* screen allows the user to upload documents relevant to the Referral into ITM.

Document Folder screen

The screenshot shows the ITM Document Folder screen. On the left is a navigation menu with options: Referral Info, Contact Info, Core Team Feedback, Team Members, Technical Assistance, Meetings, Service Involvement, Employment/Education, CANS/ANSA History, Placement History, and Document Folder (highlighted). The main content area is titled 'Documents Folder' and includes a 'Referral Summary - Test Demo' section with fields for Referral Date (04/11/2016), Referral Status (Accepted), Assigned Worker (KDTST1, KDTST1), Referral Type (-Select-), and Referral ID (1599). Below this is the 'Document Folder' section with a table for existing entries and a form for adding new ones. The table has columns for Document ID, Uploaded Date, File Name, Description, and Uploaded By. The form has fields for Uploaded Date (05/15/2016), Uploaded By (Jane Smith), Description, and File Name (with a 'Browse' button), and a 'Save' button.

Navigation

1. From the **Dashboard**: Locate the desired Referral and click on the *Referral ID* to bring the Referral into focus.
 - a. Click on the **Document Folder** tile.



Document Folder

1. Document Folder:

Document Folder

Document ID	Uploaded Date	File Name	Description	Uploaded By

Uploaded Date

05/15/2016

Uploaded By

Jane Smith

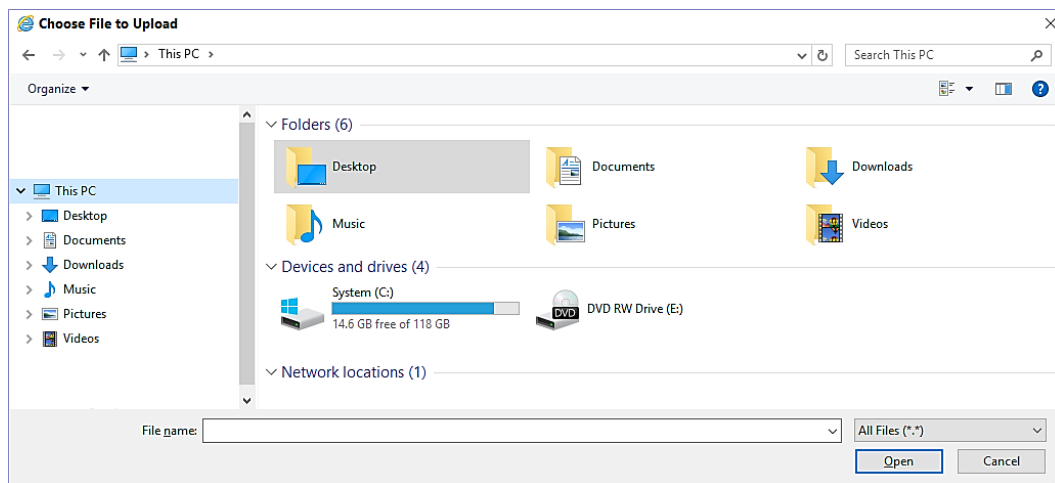
Description

File Name*

Browse

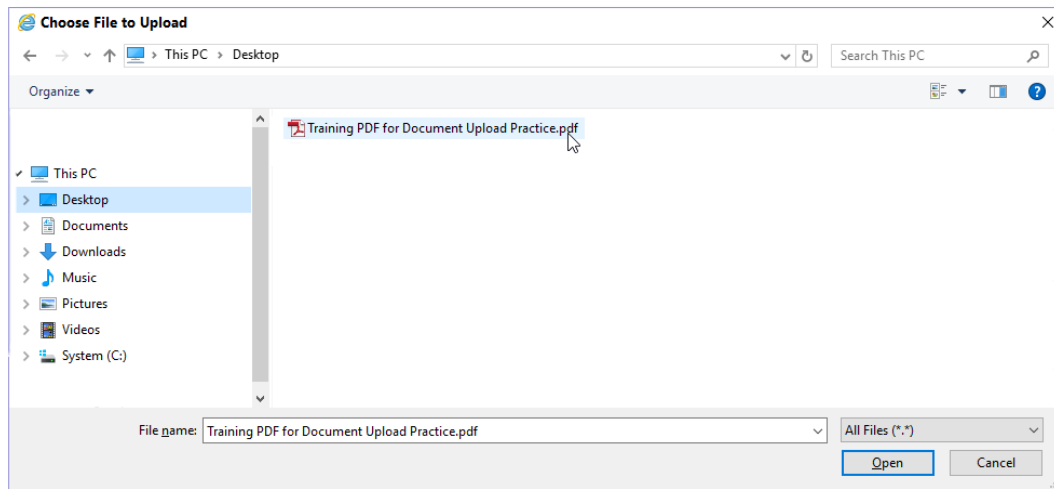
Save

- a. Click the **Browse** button to locate the desired file. The *Choose File to Upload* dialog box will open.





- b. Navigate to the desired file and click on the file to select it.



- c. Click **Open** to choose the selected file for upload.

Clicking **Cancel** will close the *Choose File to Upload* dialog box without selecting a file.

2. The file will now display in the *File Name* field.

Uploaded Date	Uploaded By	Description	File Name*	
05/15/2016	Jane Smith		Training PDF for Docu...	Browse
Save				

- a. Enter a description for the file in the *Description* section and click **Save**.

3. The file is now uploaded to ITM and can be opened by clicking on the file name in the grid.

Document ID	Date	File Name	Description	Uploaded By	
1	05/15/2016	Training PDF for Document Upload Practice.pdf	Job Aid Document	Smith, Jane	

4. To delete the document, click the to the right of the individual in the *Document Folder* grid. A *Confirm Delete* pop-up will appear: Clicking **Yes** will delete the document. Clicking **No** will cancel the action and the Document will not be deleted.

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 the Self Service Tool go to <http://servicedesk.alleghenycounty.us>