

## \*\*\*\*SPECIAL MISSIVE\*\*\*\*

## **DASHBOARDS ARE HERE!**

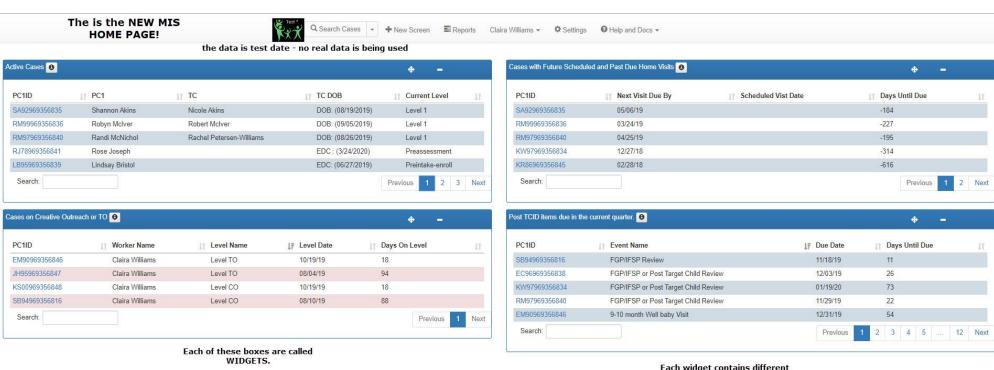
(\*\*\*FYI\*\*\* If you have an MIS User role of Supervisor or Data Entry, you will not see the dashboards. The programmers are working hard, creating new dashboards for Supervisors and Program Managers.)

If you have not already done so, please make sure all the worker forms are linked to the worker record.

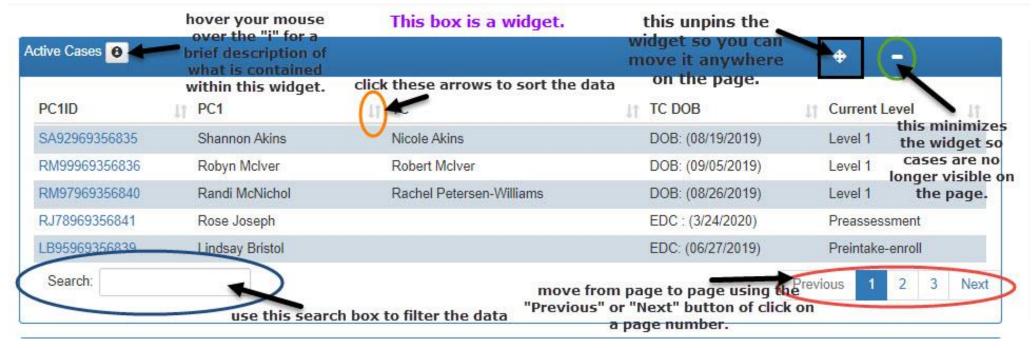
Instructions to link a worker record to the worker form

- Go to Worker form located at the bottom of the Data Entry column under settings
- Click the Edit button next to the worker you want to link.
- Go to UserName at the bottom of the Worker Form.
- Click the Select drop down box.
- Select the User Name that matches the worker.
- Click the submit Button to save.

1. Here is your new Home Page! The MIS Home Page Dashboard now shows several widgets that contain lists of active cases, cases on TO or CO, late or upcoming Home Visits, and so much more! This was designed to help all HF staff to organize their days and weeks. *You will only see cases assigned to YOU!* 



Each widget contains different information to help you organize your day. 2. Each widget has the same functions and can be controlled in the same manner.



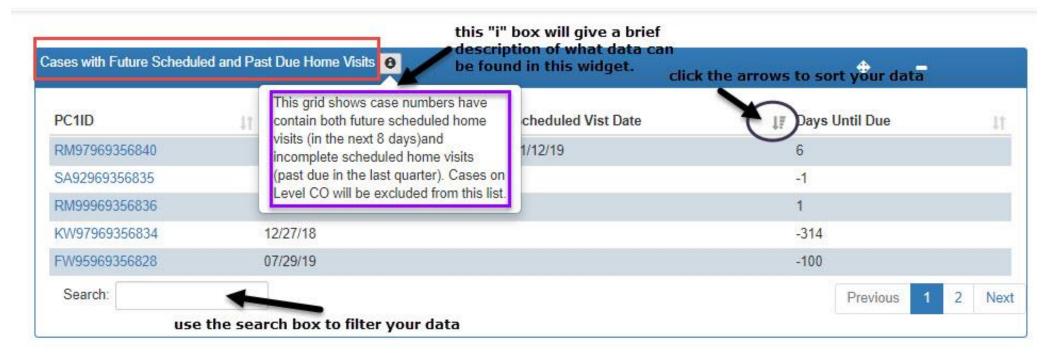
- 3. There are four widgets on the Home Page of the MIS.
  - Active Cases
  - Cases with Future Scheduled and Past Due Home Visits
  - Cases on Creative Outreach or TO
  - Post TCID items due in the current quarter.

Let's take a close look at each one.

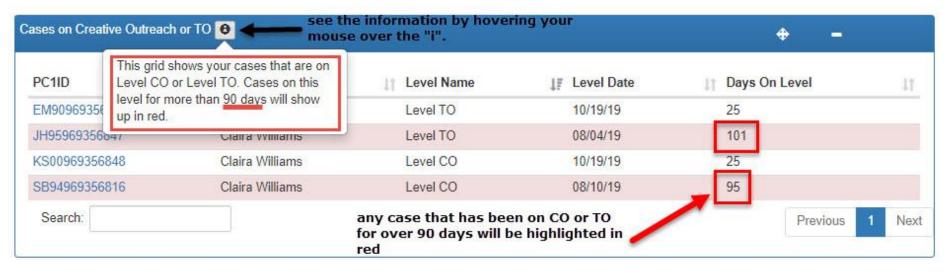
a. The Active Case widget contains all the active cases assigned to the FRS/FSS. Closed cases, cases that are on level CO or TO will not appear in this widget. Notice white display box under the "i". This will give a brief description of the data that is in this widget. Click the arrows the left of each column name to sort the data to make it easier to find a case. You can sort by PC1ID, PC1 name, TC name, TC DOB and by Current Level. You can also use the Search box to filter the data by typing a name or date or PC1ID in the open field.



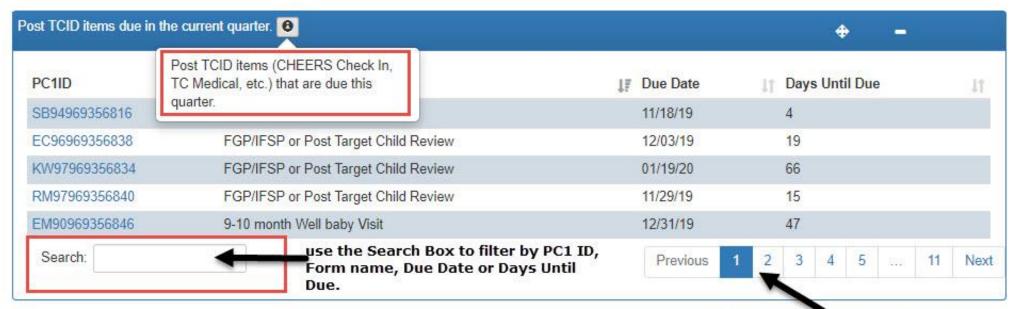
b. The Cases with Future Scheduled and Past Due Home Visits widget contains cases that are expecting a Home Visit within 8 days of the current date. Any cases that have over due Home Visits that have not been entered or completed will also be listed in this widget. Please see the white info box that provides a brief description of the data collected in this widget. Use the arrows to sort your data by PC1ID, Next Visit Due By Date, Schedule Visit date and Days Until Due. Type dates or PC1Ids in the search box to filter your data.



c. The *Cases on Creative Outreach or TO* widget contains cases with levels of CO (creative outreach) or, TO (Temporary Out of Area). Cases on these levels for over 90 days will be highlighted in RED. Please see the white info box that provides a brief description of the data collected in this widget. Use the arrows to sort the data and the search box to filter the data.



d. The *Post TCID items due in the current quarter* widget was created to help in organizing daily and weekly schedules. By clicking on the arrows next to the column headings, *the data can be sorted* in four ways: PC1ID, Event Name, Due Date and Days Until Due.



click on the numbers, or, use the Previous and Next buttons to move from page to page.

4. Once again, the dashboards will only be seen by *MIS Users that handle a caseload*. If you have a caseload are not able to see a dashboard when we publish, please send a Support Ticket. This is the quickest way to resolve your questions.

- 5. This will be published next week. We are happy to receive constructive feedback from all users. You are our best testers!
- 6. As always, if you have questions regarding this or any other MIS issue, please submit a SUPPORT TICKET or call us at 518-591-8610.

Please forward this missive to anyone who should be receiving it. Send us their email address so we can include them on the next one.

\*\*FYI, opting out of this email will remove you from the listserv.\*\*

Thank you!
Take care,
Your MIS Team