HFMISsive –

****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!***

The is the NEW MIS HOME PAGE!

Search Cases ▾ ➕ New Screen 📑 Reports Claira Williams ▾ ⚙ Settings ❓ Help and Docs ▾

the data is test date - no real data is being used

Active Cases ⓘ   ✛ −

PC1ID	PC1	TC	TC DOB	Current Level
SA92969356835	Shannon Akins	Nicole Akins	DOB: (08/19/2019)	Level 1
RM99969356836	Robyn McIver	Robert McIver	DOB: (09/05/2019)	Level 1
RM97969356840	Randi McNichol	Rachel Petersen-Williams	DOB: (08/26/2019)	Level 1
RJ78969356841	Rose Joseph		EDC : (3/24/2020)	Preassessment
LB95969356839	Lindsay Bristol		EDC: (06/27/2019)	Preintake-enroll

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Cases with Future Scheduled and Past Due Home Visits ⓘ   ✛ −

PC1ID	Next Visit Due By	Scheduled Vist Date	Days Until Due
SA92969356835	05/06/19		-184
RM99969356836	03/24/19		-227
RM97969356840	04/25/19		-195
KW97969356834	12/27/18		-314
KR86969356845	02/28/18		-616

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Cases on Creative Outreach or TO ⓘ   ✛ −

PC1ID	Worker Name	Level Name	Level Date	Days On Level
EM90969356846	Claira Williams	Level TO	10/19/19	18
JH95969356847	Claira Williams	Level TO	08/04/19	94
KS00969356848	Claira Williams	Level CO	10/19/19	18
SB94969356816	Claira Williams	Level CO	08/10/19	88

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Each of these boxes are called WIDGETS.

Post TCID items due in the current quarter. ⓘ   ✛ −

PC1ID	Event Name	Due Date	Days Until Due
SB94969356816	FGP/IFSP Review	11/18/19	11
EC96969356838	FGP/IFSP or Post Target Child Review	12/03/19	26
KW97969356834	FGP/IFSP or Post Target Child Review	01/19/20	73
RM97969356840	FGP/IFSP or Post Target Child Review	11/29/19	22
EM90969356846	9-10 month Well baby Visit	12/31/19	54

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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.

hover your mouse over the "i" for a brief description of what is contained within this widget.

This box is a widget.

click these arrows to sort the data

this unpins the widget so you can move it anywhere on the page.

this minimizes the widget so cases are no longer visible on the page.

PC1ID	PC1		TC DOB	Current Level
SA92969356835	Shannon Akins	Nicole Akins	DOB: (08/19/2019)	Level 1
RM99969356836	Robyn McIver	Robert McIver	DOB: (09/05/2019)	Level 1
RM97969356840	Randi McNichol	Rachel Petersen-Williams	DOB: (08/26/2019)	Level 1
RJ78969356841	Rose Joseph		EDC : (3/24/2020)	Preassessment
LB95969356839	Lindsay Bristol		EDC: (06/27/2019)	Preintake-enroll

Search:

use this search box to filter the data

move from page to page using the "Previous" or "Next" button of click on a page number.

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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.

		TC	TC DOB	Current Level	
The Active Case List displays cases for each FSS with information such as Name, PC1 ID, address, phone number, Target Child Name, TC DOB or EDC, current level.					
	kins	Nicole Akins	DOB: (08/19/2019)	Level 1	
	ver	Robert McIver	DOB: (09/05/2019)	Level 1	
RM97969356840	Randi McNichol	Rachel Petersen-Williams	DOB: (08/26/2019)	Level 1	
RJ78969356841	Rose Joseph		EDC : (3/24/2020)	Preassessment	
LB95969356839	Lindsay Bristol		EDC: (06/27/2019)	Preintake-enroll	

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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.

this "i" box will give a brief description of what data can be found in this widget.

click the arrows to sort your data

Cases with Future Scheduled and Past Due Home Visits ⓘ

This grid shows case numbers have contain both future scheduled home visits (in the next 8 days)and incomplete scheduled home visits (past due in the last quarter). Cases on Level CO will be excluded from this list.

PC1ID	⇅		cheduled Vist Date	⇅	Days Until Due	⇅
RM97969356840			1/12/19		6	
SA92969356835					-1	
RM99969356836					1	
KW97969356834		12/27/18			-314	
FW95969356828		07/29/19			-100	

Search: ⬅

use the search box to filter your data

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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.

Cases on Creative Outreach or TO ❶ ⬅ **see the information by hovering your mouse over the "i".**

This grid shows your cases that are on Level CO or Level TO. Cases on this level for more than 90 days will show up in red.

PC1ID		Level Name	Level Date	Days On Level	
EM9096935...		Level TO	10/19/19	25	
JH95969356...	Claira Williams	Level TO	08/04/19	101	
KS00969356848	Claira Williams	Level CO	10/19/19	25	
SB94969356816	Claira Williams	Level CO	08/10/19	95	

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any case that has been on CO or TO for over 90 days will be highlighted in red

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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.

PC1ID		Due Date	Days Until Due
SB94969356816	*Post TCID items (CHEERS Check In, TC Medical, etc.) that are due this quarter.*	11/18/19	4
EC96969356838	FGP/IFSP or Post Target Child Review	12/03/19	19
KW97969356834	FGP/IFSP or Post Target Child Review	01/19/20	66
RM97969356840	FGP/IFSP or Post Target Child Review	11/29/19	15
EM90969356846	9-10 month Well baby Visit	12/31/19	47

Post TCID items due in the current quarter.

Search: ◄ **use the Search Box to filter by PC1 ID, Form name, Due Date or Days Until Due.**

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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