

PENNSYLVANIA DEPARTMENT OF AGING



AGING.PA.GOV

*Introduction to Dashboards & Widgets in Aging & Disability (SAMS)
March 2021*

Training Goals

- Understand the difference between a Dashboard, a Widget, and a Saved Search
- Learn how to access your Dashboard
- Learn how to create, modify, and add a Widget to your Dashboard
- Learn how to create and add a Saved Search to your Dashboard

What is a Dashboard?

- Dedicated space within A&D to view Widgets
- Click **My Dashboard** Located in Navigation bar



- Does not contain any information until you add Widgets



What is a Widget?

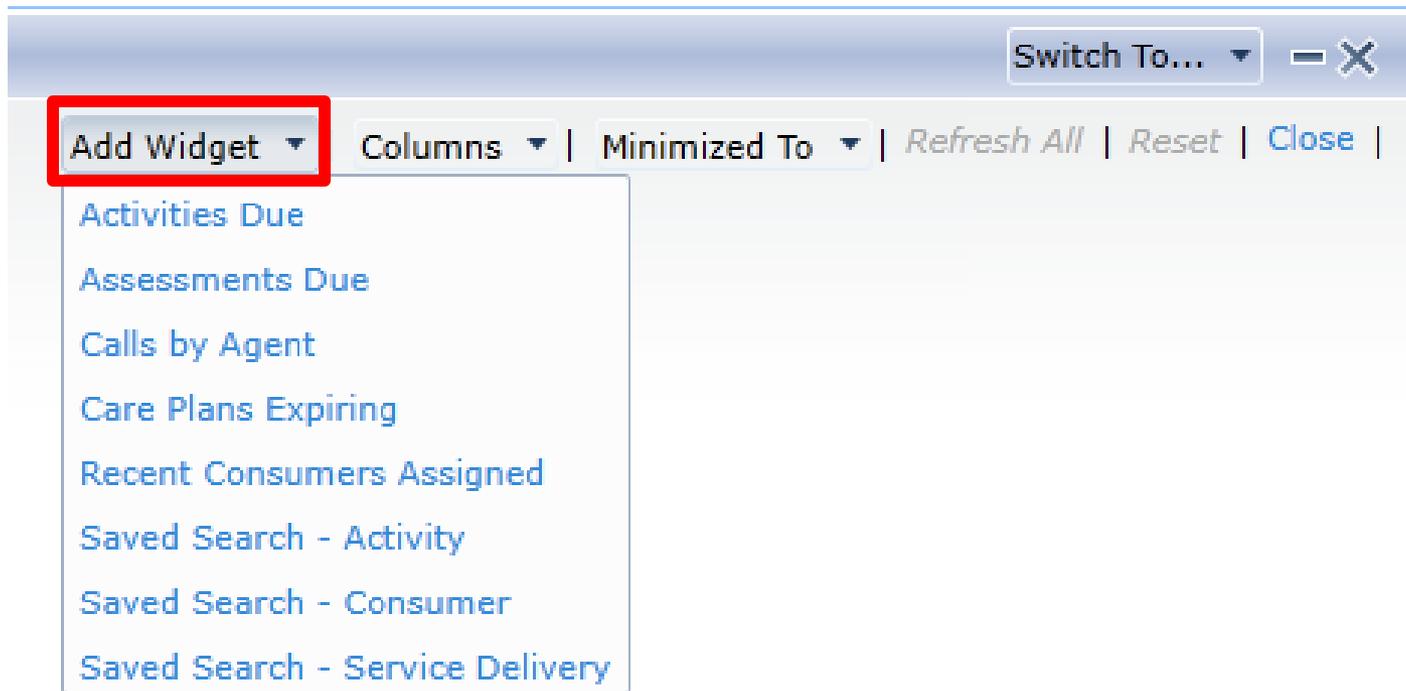
- Widgets show important tasks and other helpful information based upon search criteria
 - Activities Due
 - Assessments Due
 - Care Plans Expiring
 - Recent Consumers Assigned
 - Saved Search – Activity
 - Saved Search – Consumer
 - Saved Search – Service Delivery

What is a Widget?

- Nuances of Widgets
 - Not as comprehensive as reports but can be useful
 - Typically created and maintained by the AAA
 - Cannot be published/pushed to all users, each user must manually add Widgets to their own Dashboard
 - Cannot pull data from assessment forms (i.e., NAT, NAT-E, CAT, RON, etc.)

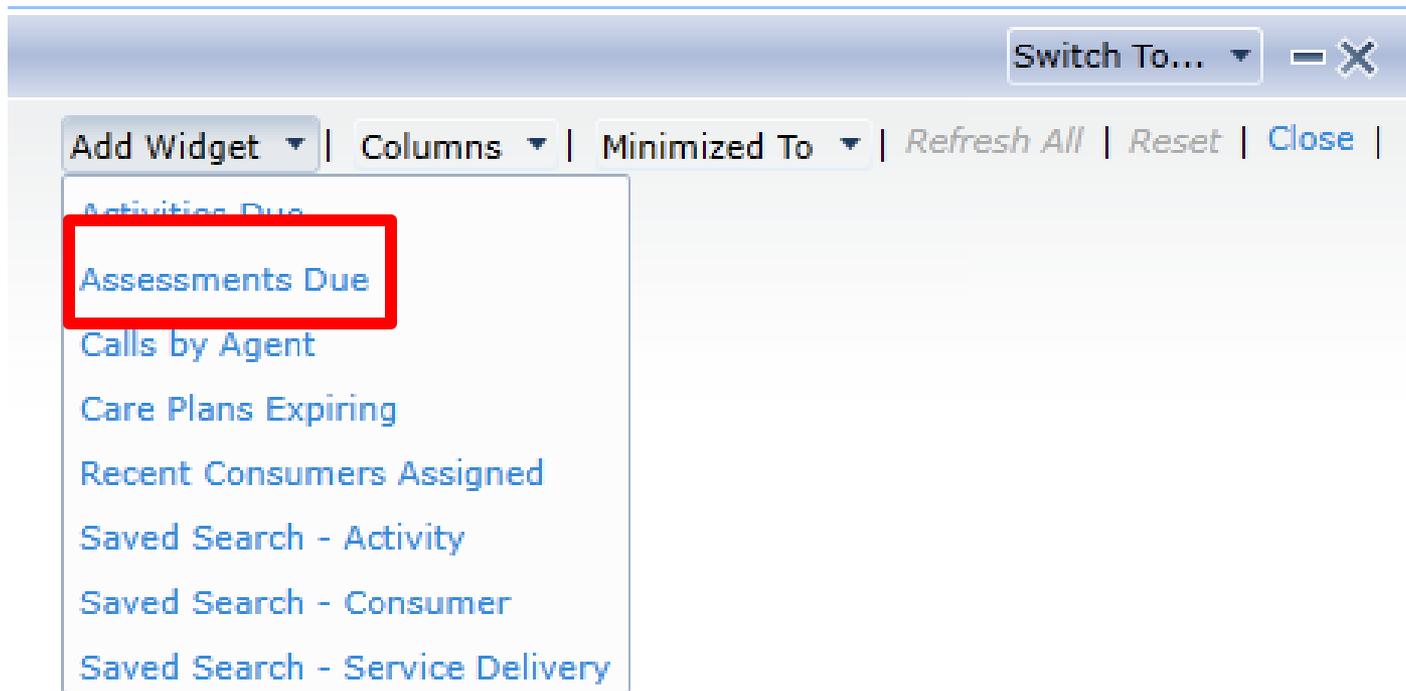
Adding a Widget

- In your Dashboard, click on the **Add Widget** dropdown and select the desired Widget



Adding a Widget

- In your Dashboard, click on the **Add Widget** dropdown and select the desired Widget



Adding a Widget

- This example shows the initial set up of the **Assessments Due Widget**

Edward Slavinsky's Dashboard

Switch To... - X

Add Widget | Columns | Minimized To | Refresh All | Reset | Close |

Assessments Due - All Care Managers (789)

Care Managers

All Care Managers (789)

Refresh | Open | Open Consumer | Copy | Delete | Print | Print Grid | Export Grid | Format Columns | Close |

Drag a column header and drop it here to group by that column

Row Actions	ID	Active?	Name	Assessment Form	Assessment Date	Next Assessment Date
 				NAT Express 12-3-18	09/10/2020	03/10/2021
 				Needs Assessment Tool 12-3-18	03/12/2020	03/12/2021
 				Caregiver Assessment Tool	09/16/2020	03/16/2021
 				PS Report of Need 5-1-2018	09/11/2020	03/11/2021

789 records

Filters : From Last week To Next week

Title: Assessments Due

From (Due Date): Last week

To (Due Date): Next week

Care Managers: (Any)

Customizing a Widget

- Each user can
 - Add their own **Title**
 - Change the desired **From** and **To** due dates
 - Select specific **Care Managers**
 - Supervisors can select all of their Care Managers
 - Care Managers can also edit to only see themselves

Filters : From Last week To Next week

Title

Assessments Due

From (Due Date)

Last week

To (Due Date)

Next week

Care Managers

(Any)



Customizing a Widget

- After you update the filters of your Widget, press **Refresh**

Edward Slavinsky's Dashboard

Switch To... - X

Add Widget | Columns | Minimized To | Refresh All | Reset | Close

Upcoming Assessments Due - All Care Managers (793)

Care Managers

All Care Managers (793)

Refresh | Open | Open Consumer | Copy | Delete | Print | Print Grid | Export Grid | Format Columns | Close

Drag a column header and drop it here to group by that column

Row Actions	ID	Active?	Name	Assessment Form	Assessment Date	Next Assessment Date
				Needs Assessment Tool 12-3-18	03/06/2020	03/06/2021
				NAT Express 12-3-18	03/06/2020	03/06/2021
				NAT Express 12-3-18	03/06/2020	03/06/2021
				NAT Express 12-3-18	03/06/2020	03/06/2021

793 records

Filters : From Last week To Next week

Title: Upcoming Assessments Due

From (Due Date): Last week

To (Due Date): Next week

Care Managers: ROBERT HOPKINS

Removed for Instruction

Customizing a Widget

- The filtered results will now appear

Edward Slavinsky's Dashboard

Switch To... - X

Add Widget | Columns | Minimized To | Refresh All | Reset | Close

Upcoming Assessments Due - ROBERT HOPKINS (2)

Care Managers

ROBERT HOPKINS (2)

Refresh | Open | Open Consumer | Copy | Delete | Print | Print Grid | Export Grid | Format Columns | Close

Drag a column header and drop it here to group by that column

Row Actions	ID	Active?	Name	Assessment Form	Assessment Date	Next Assessment Date
 				Needs Assessment Tool 12-3-18	03/16/2020	03/16/2021
 				NAT Express 12-3-18	03/17/2020	03/17/2021

2 records

Filters : From Last week To Next week

Title: Upcoming Assessments Due

From (Due Date): Last week

To (Due Date): Next week

Care Managers: ROBERT HOPKINS

Removed for Instruction

Customizing a Widget

- You can press **Close** and this Widget will appear the next time you open your dashboard with the filters saved

Edward Slavinsky's Dashboard

Switch To... - X

Add Widget | Columns | Minimized To | Refresh All | Rese | **Close**

Upcoming Assessments Due - ROBERT HOPKINS (2)

Care Managers

ROBERT HOPKINS (2)

Refresh | Open | Open Consumer | Copy | Delete | Print | Print Grid | Export Grid | Format Columns | Close

Drag a column header and drop it here to group by that column

Row Actions	ID	Active?	Name	Assessment Form	Assessment Date	Next Assessment Date
 				Needs Assessment Tool 12-3-18	03/16/2020	03/16/2021
 				NAT Express 12-3-18	03/17/2020	03/17/2021

2 records

Filters : From Last week To Next week

Title: Upcoming Assessments Due

From (Due Date): Last week

To (Due Date): Next week

Adding an Additional Widget

- Or you may create and add another Widget by pressing **Add Widget**

Edward Slavinsky's Dashboard

Switch To... - X

Add Widget - Columns - Minimized To - Refresh All | Reset | Close

Upcoming Assessments Due - ROBERT HOPKINS (2)

Care Managers

ROBERT HOPKINS (2)

Refresh | Open | Open Consumer - Copy | Delete | Print - Print Grid | Export Grid | Format Columns | Close

Drag a column header and drop it here to group by that column

Row Actions	ID	Active?	Name	Assessment Form	Assessment Date	Next Assessment Date
 				Needs Assessment Tool 12-3-18	03/16/2020	03/16/2021
 				NAT Express 12-3-18	03/17/2020	03/17/2021

2 records

Filters : From Last week To Next week

Title: Upcoming Assessments Due

From (Due Date): Last week

To (Due Date): Next week

Adding an Additional Widget

- In the example below we added a new **Activities Due** Widget

The screenshot shows a web dashboard titled "Edward Slavinsky's Dashboard". A new widget titled "Activities Due - All Care Managers (3855)" is highlighted with a red border. The widget contains a table with columns: Row Actions, ID, Active?, Name, DOB, SSN, and Town of Residence. Two rows of data are visible. A red text overlay "Removed for Instruction" is placed over the first two rows of the table. The widget also includes a toolbar with options like Refresh, Open, Open Consumer, Copy, Delete, Print, Print Grid, and Export Grid. Below the table, it indicates "3855 records". To the right of the widget, there is a sidebar with a section titled "Upcoming..." containing the text "ROBERT HOPKINS (2)".

Row Actions	ID	Active?	Name	DOB	SSN	Town of Residence
 				01/06/1933	208-26-5957	Brookville
 				10/05/1922	141-16-5641	Berwyn

Adding an Additional Widget

- Notice that your other widget is now minimized but remains accessible

The screenshot shows a web dashboard titled "Edward Slavinsky's Dashboard". The main content area is titled "Activities Due - All Care Managers (3855)". On the left, there is a sidebar with a "Care Managers" dropdown menu and a list of "All Care Managers (3855)". The main table displays a list of records with columns for "Row Actions", "ID", "Active?", "Name", "DOB", "SSN", and "Town of Residence". Two rows are visible: one for a person born 01/06/1933 with SSN 208-26-5957 from Brookville, and another for a person born 10/05/1922 with SSN 141-16-5641 from Berwyn. A red box highlights a minimized widget titled "Upcoming..." which shows "ROBERT HOPKINS (2)". A red text overlay "Removed for Instruction" is placed over the table data. The dashboard includes various navigation and utility buttons like "Refresh", "Open", "Copy", "Delete", "Print", "Export Grid", and "Close".

Row Actions	ID	Active?	Name	DOB	SSN	Town of Residence
 				01/06/1933	208-26-5957	Brookville
 				10/05/1922	141-16-5641	Berwyn

3855 records

Filters : From Last week To Next week

Upcoming...
ROBERT HOPKINS (2)

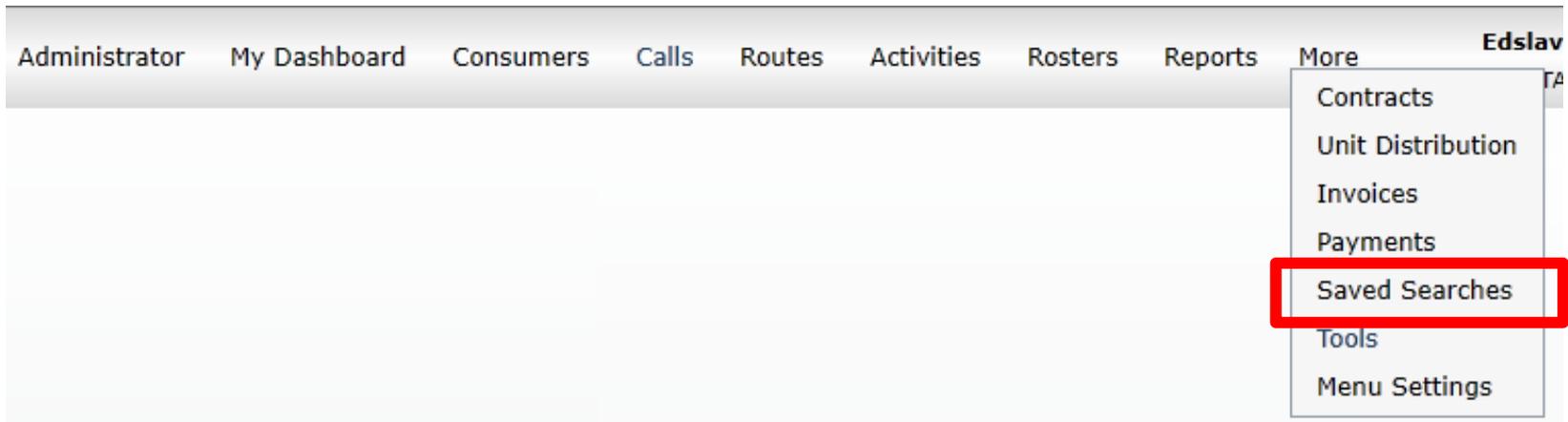
Removed for Instruction

Saved Search Widgets

- Saved Searches allow the user to create their own customized widget based upon one of the following topics
 - Activities
 - Consumers
 - Service Deliveries
- Saved Searches must be created before they are available for selection in the Dashboard

Creating a Saved Search

- Navigate to **Saved Searches** in the navigation bar (usually located under **More**)



Creating a Saved Search

- Saved Searches are set up similar to reports
 - Users can customize their search criteria
 - Users can save their searches as Saved Search Definitions (similar to Report Definitions)

The screenshot displays two sections of a software interface. The top section, titled 'Saved Searches', shows a table with three rows. The first row is selected. The bottom section, titled 'Saved Search Definitions', shows a table with two rows. The first row is selected.

Saved Searches

Row Actions	Type	Title	Description	Comments
+	Saved Searches	Activity Search	A list of activities with attribute and consumer demographic filters.	Custom Search
+	Saved Searches	Consumer Search	A list of consumers with demographic filters.	Custom Search
+	Saved Searches	Service Delivery Search	A list of service deliveries with attribute and consumer demographic filters.	Custom Search

3 Saved Searches, 1 Selected

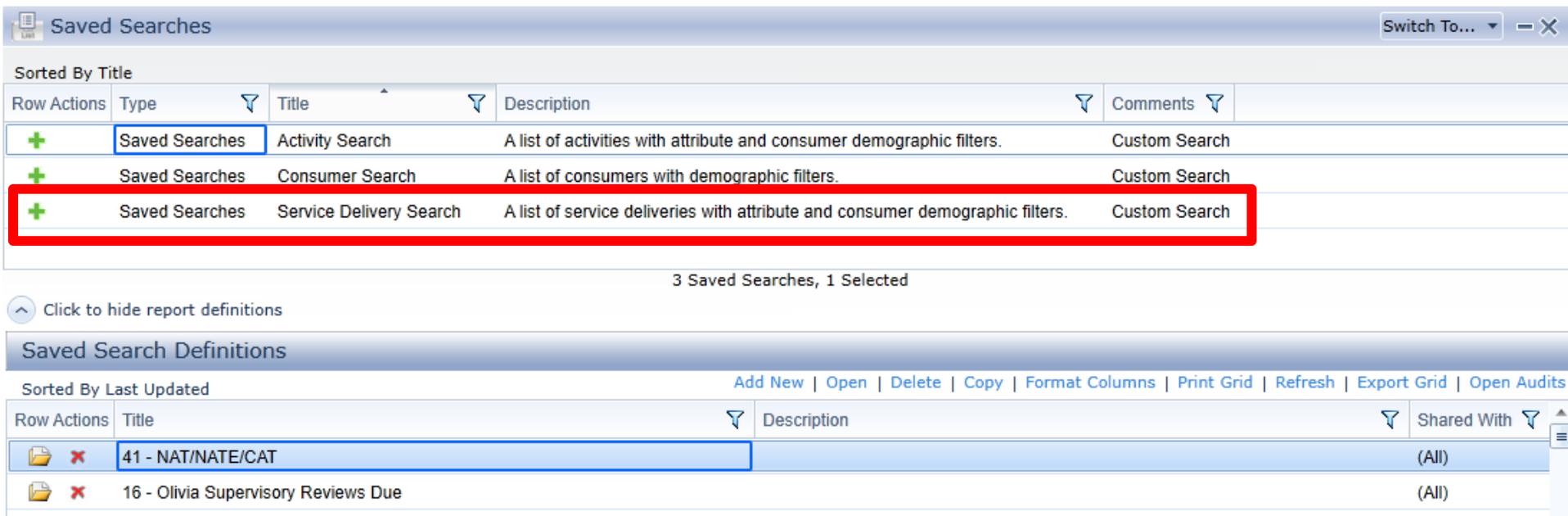
Click to hide report definitions

Saved Search Definitions

Row Actions	Title	Description	Shared With
🗑️ ✖	41 - NAT/NATE/CAT		(All)
🗑️ ✖	16 - Olivia Supervisory Reviews Due		(All)

Creating a Service Delivery Saved Search

- The user can double-click on the **Service Delivery Search** to open this Saved Search



The screenshot shows a software interface with two main sections. The top section is titled "Saved Searches" and contains a table with the following data:

Row Actions	Type	Title	Description	Comments
+	Saved Searches	Activity Search	A list of activities with attribute and consumer demographic filters.	Custom Search
+	Saved Searches	Consumer Search	A list of consumers with demographic filters.	Custom Search
+	Saved Searches	Service Delivery Search	A list of service deliveries with attribute and consumer demographic filters.	Custom Search

Below the table, it says "3 Saved Searches, 1 Selected".

The bottom section is titled "Saved Search Definitions" and contains a table with the following data:

Row Actions	Title	Description	Shared With
📁 ✖	41 - NAT/NATE/CAT		(All)
📁 ✖	16 - Olivia Supervisory Reviews Due		(All)

Creating a Service Delivery Saved Search

- In the next window, the user will update the search criteria so that the proper information is displayed

The screenshot shows a web application window titled "Saved Search Definition - Service Delivery Search". The window has a menu bar with options: Save, Save and Close, Close, Make a Copy, Open Audits, and Preview. Below the menu bar, there are navigation links: OK, Expand All, and Collapse All. The main content area is divided into several sections, each with a dropdown arrow and a label: Details, (Search Results) (0/1), Care Enrollment (0/12), Care Providers (0/2), Consumer Details (0/5), Residential Location (0/5), and Service Delivery (0/15). The Service Delivery section is expanded, showing a grid of search criteria fields. Each field has a label, a text input box, and a small icon (a folder with an 'x'). The fields are: Service Start Date (on or after), Service End Date (on or before), Agency, Provider, Subprovider, Service Category, Service, Level of Care, Service Program, Care Program, Fund Identifier, Place of Service, Subservice, Site, and Caregiver. All input boxes contain the text "(Any)".

Creating a Service Delivery Saved Search

- This example shows any consumers who had a Home Mod-Stair Glide service last month in Montgomery County AAA

Service Delivery (4/15)

Service Start Date (on or after) 2/1/2021	Service End Date (on or before) 2/28/2021	Agency Montgomery County Aging and Adult Services
Provider (Any)	Subprovider (Any)	Service Category (Any)
Service Home Mod-Stair Glide	Level of Care (Any)	Service Program (Any)
Care Program (Any)	Fund Identifier (Any)	Place of Service (Any)
Subservice (Any)	Site (Any)	Caregiver (Any)

Creating a Service Delivery Saved Search

- Users can customize Saved Searches by
 - Adding a title,
 - Subtitle, and
 - Description,
- User can also determine if this Saved Search
 - Is to be shared,
 - With whom it should be shared, as well as,
 - Identify which fields are allowed to be modified.

Creating a Service Delivery Saved Search

- Once users are satisfied with their Save Search, they should press **Save and Close**

Saved Search Definition - Service Delivery Search - Home Mod Service Delivery

Switch To... - X

Save Save and Close Close | Make a Copy | Open Audits | Preview

Comments

OK | Expand All | Collapse All

Details

Title	Subtitle	Description
Home Mod Service Delivery	Montgomery AAA	Ed S Test
Shared With	Shared with Organization	Modifications Allowed
Agency	Montgomery County Aging and Adult Services	Date Fields Only

Creating a Service Delivery Saved Search

- Once the Saved Searches screen appears, the user will now find that their newly created Saved Search is available as a Saved Search Definition

The screenshot shows a web application interface for 'Saved Searches'. The top section is a table with columns: Row Actions, Type, Title, Description, and Comments. It lists three saved searches, with 'Service Delivery Search' selected. Below this is a 'Saved Search Definitions' section, also a table, with columns: Row Actions, Title, Description, and Shared With. The 'Home Mod Service Delivery' entry is highlighted with a red box.

Row Actions	Type	Title	Description	Comments
+	Saved Searches	Activity Search	A list of activities with attribute and consumer demographic filters.	Custom Search
+	Saved Searches	Consumer Search	A list of consumers with demographic filters.	Custom Search
+	Saved Searches	Service Delivery Search	A list of service deliveries with attribute and consumer demographic filters.	Custom Search

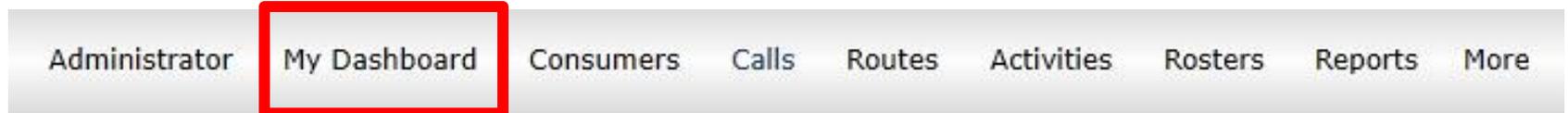
3 Saved Searches, 1 Selected

Click to hide report definitions

Row Actions	Title	Description	Shared With
	Home Mod Service Delivery	Ed S Test	Agency
	US Guardian Consumers		Agency

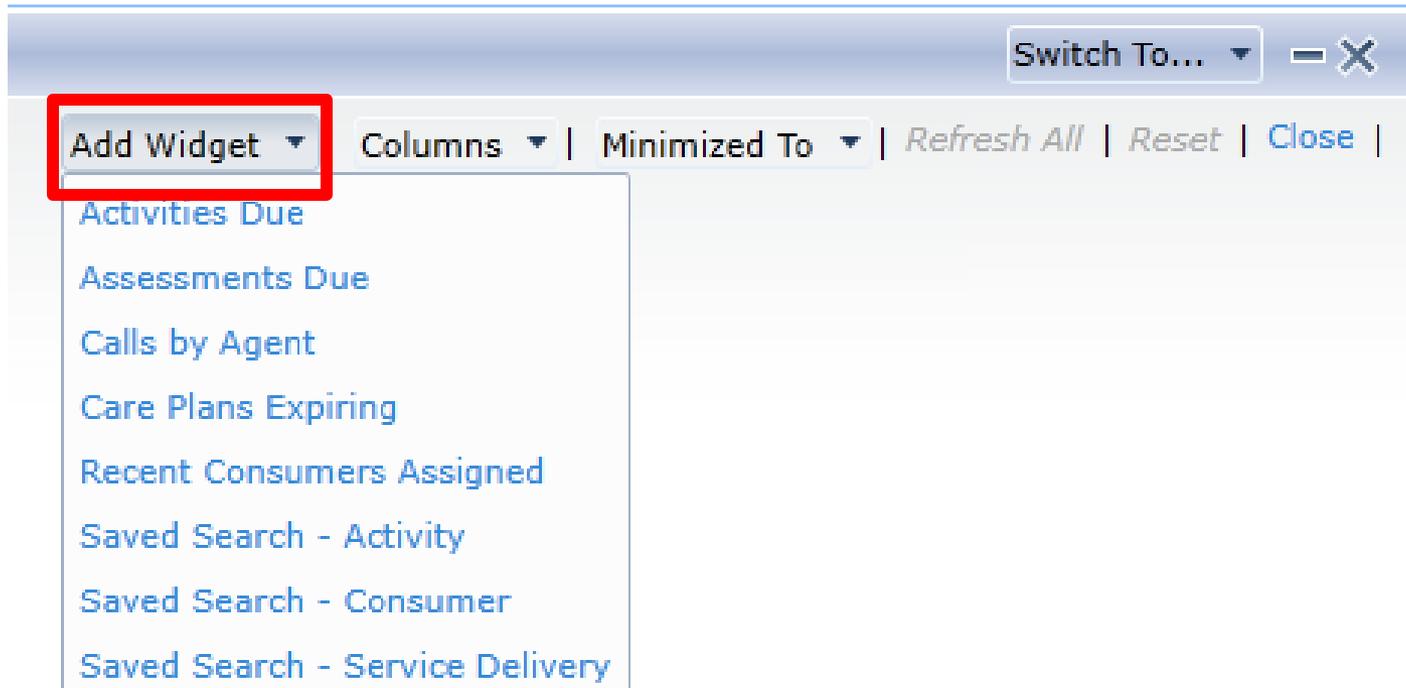
Adding a Saved Search to Dashboard

- To add a Saved Search to a users Dashboard, they will click on **My Dashboard** in the navigation bar



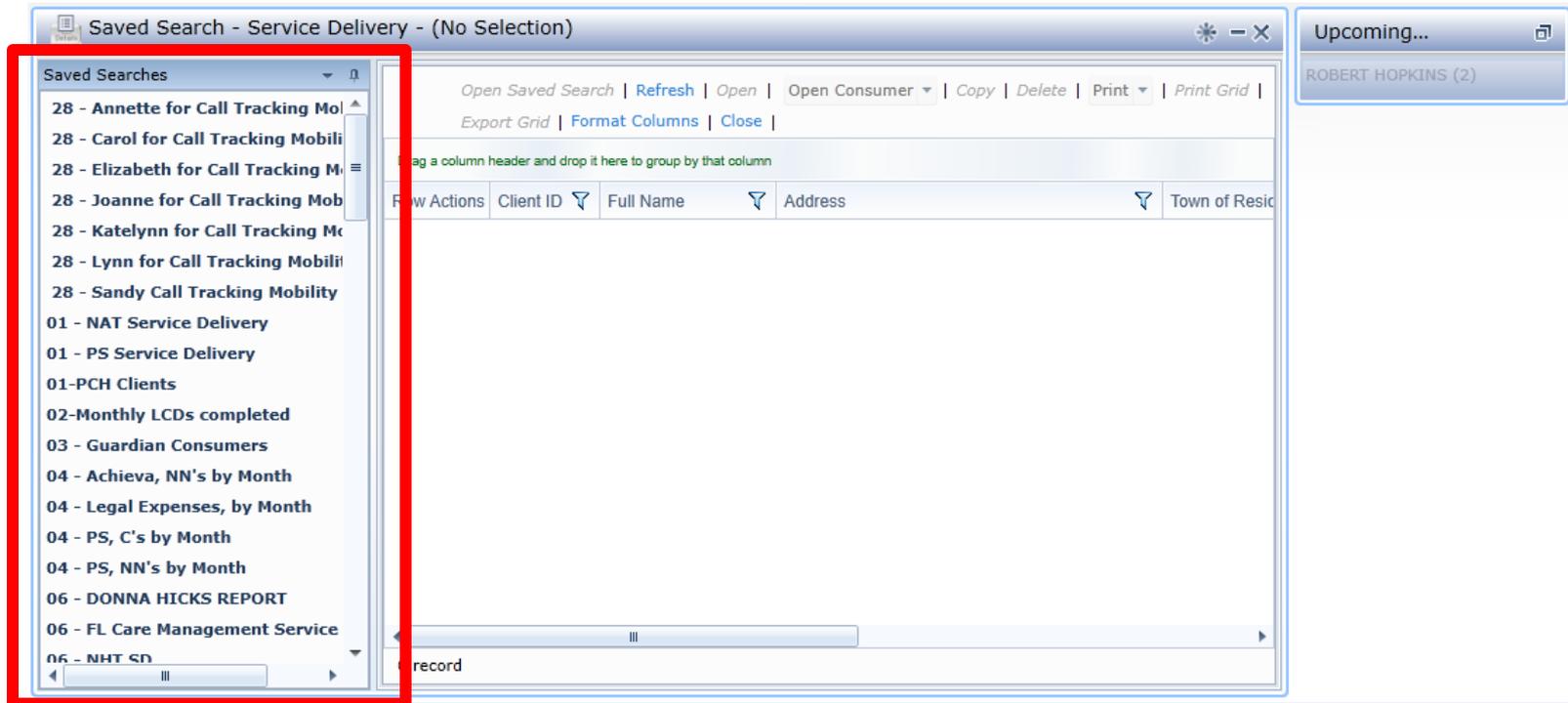
Adding a Saved Search to Dashboard

- In your Dashboard, click on the **Add Widget** dropdown and select the desired Saved Search Widget



Adding a Saved Search to Dashboard

- Once the Saved Search window appears, the user will need to find the desired Saved Search from the available listing of Saved Searches



Adding a Saved Search to Dashboard

- Once the desired Saved Search is located, click on the Saved Search to see the results

Removed for Instruction

Adding a Saved Search to Dashboard

- To edit the parameters of the Saved Search (i.e. change date range of query) users will click on **Open Saved Search**

The screenshot displays a web application window titled "Saved Search - Service Delivery - Home Mod Service Delivery". On the left, a sidebar lists various saved searches, with "Home Mod Service Delivery" selected. The main area shows a table with columns for "Client ID", "First Name", "Full Name", and "Address". The "Open Saved Search" button in the top toolbar is highlighted with a red box. A red text overlay "Removed for Instruction" is centered over the table. In the top right corner, a notification box shows "Upcoming..." for "ROBERT HOPKINS (2)".

Adding a Saved Search to Dashboard

- Users will then need to press **Open** on the Saved Search Definition screen

The screenshot shows a web interface for a 'Saved Search Definition'. At the top, there is a title bar 'Saved Search Definition - Service Delivery Search - Home Mod Service Delivery' and a navigation menu with options: 'Save', 'Save and Close', 'Close', 'Reject Changes', 'Open Audits', and 'Preview'. Below this is a 'Comments' section with an empty text area. The main content area is titled 'Open Saved Search Definition' and contains a table of metadata. Below the table is a section titled 'Service Delivery' with a table of service details. The 'Open' button is highlighted with a red box.

Title	Home Mod Service Delivery
Subtitle	Montgomery AAA
Description	Ed S Test
Shared With	Agency
Shared with Organization	Montgomery County Aging and Adult Services
Modifications Allowed	Date Fields Only

Service Start Date (on or after)	02/01/2021
Service End Date (on or before)	02/28/2021
Agency	Montgomery County Aging and Adult Services
Service	Home Mod-Stair Glide

Adding a Saved Search to Dashboard

- This will allow the users to change the date range as needed to keep widget beneficial

The screenshot shows a web form titled "Saved Search Definition - Service Delivery Search - Home Mod Service Delivery". At the top, there are navigation links: "Save", "Save and Close", "Close", "Reject Changes", "Open Audits", and "Preview". Below this is a "Comments" section with a text area. A "Details" section is expanded, showing fields for "Title" (Home Mod Service Delivery), "Subtitle" (Montgomery AAA), "Description" (Ed S Test), "Shared With" (Agency), "Shared with Organization" (Montgomery County Aging and Adult Services), and "Modifications Allowed" (Date Fields Only). Below the details are several expandable sections: "(Search Results) (0/1)", "Care Enrollment (0/12)", "Care Providers (0/2)", "Consumer Details (0/5)", "Residential Location (0/5)", and "Service Delivery (4/15)". At the bottom, a red box highlights two date fields: "Service Start Date (on or after)" with the value "2/1/2021" and "Service End Date (on or before)" with the value "2/28/2021".

Adding a Saved Search to Dashboard

- Once necessary changes have been made, click **Save and Close**

Saved Search Definition - Service Delivery Search - Home Mod Service Delivery

Save | **Save and Close** | Close | Reject Changes | Open Audits | Preview

OK | Expand All | Collapse All

Details

Title
Home Mod Service Delivery

Subtitle
Montgomery AAA

Description
Ed S Test

Shared With
Agency

Shared with Organization
Montgomery County Aging and Adult Services

Modifications Allowed
Date Fields Only

(Search Results) (0/1)

Care Enrollment (0/12)

Care Providers (0/2)

Consumer Details (0/5)

Residential Location (0/5)

Service Delivery (4/15)

Service Start Date (on or after)
3/1/2021

Service End Date (on or before)
3/31/2021

Adding a Saved Search to Dashboard

- You can Print or Export your Saved Search results for additional review or distribution

The screenshot displays a web application window titled "Saved Search - Service Delivery - Home Mod Service Delivery". On the left, a "Saved Searches" list includes items like "46 - PS Caseload", "47- Nevant Assessment Deliveries", and "Home Mod Service Delivery" (which is selected). The main area shows a table with columns "Client ID", "Full Name", and "Address". Above the table, a toolbar contains buttons for "Open Saved Search", "Refresh" (highlighted with a red box), "Open", "Open Consumer", "Copy", "Delete", "Print", "Print Grid", "Export Grid", "Format Columns", and "Close". A red text overlay "Removed for Instruction" is placed over the table. At the bottom, it indicates "9 records". To the right, a "Upcoming..." notification shows "ROBERT HOPKINS (2)".

Adding a Saved Search to Dashboard

- You can Print or Export your Saved Search results for additional review or distribution

The screenshot displays a web application window titled "Saved Search - Service Delivery - Home Mod Service Delivery". On the left, a "Saved Searches" list includes items like "46 - PS Caseload", "47- Nevant Assessment Deliveries", and "Home Mod Service Delivery" (which is selected). The main area shows a search results grid with columns for "Client ID", "Full Name", and "Address". Above the grid, a toolbar contains buttons for "Print", "Print Grid", "Export Grid", "Format Columns", and "Close". The "Print" and "Export Grid" buttons are highlighted with red boxes. To the right of the main window, a separate box titled "Upcoming..." shows "ROBERT HOPKINS (2)".

Summary

- The Dashboard is an area dedicated to post Widgets and Saved Searches
- Widgets and Saved Searches are tools which are similar to reports that help users easily access helpful information



Useful Resources

- Aging & Disability User Guide
 - Available in WellSky Portal under the section “Application Support Resources”
- If you have any questions or need additional assistance:
SAMS Technical Assistance
RA-AISAMSTECHASSIST@pa.gov

We are rerecording the existing legacy videos in a static format. This means that you can view the legacy videos and hear the audio, but you cannot interact with them for quizzes and hands-on exercises. The

Customer News

Application Support Resources

Guide May 2020

- **A&D - User Guide Jan 2021**  (pdf, 8.438mb)
- A&D - Word Template  (pdf, 1.602mb)
Companion Guide Sept2018