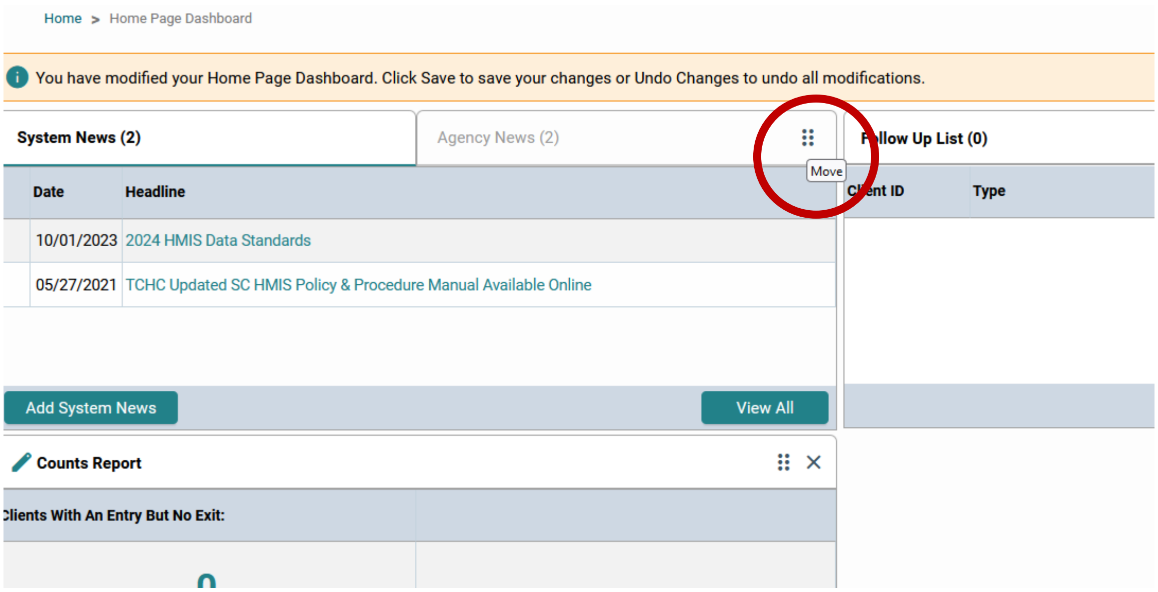
- Workflows-

Customizing Your Home Page

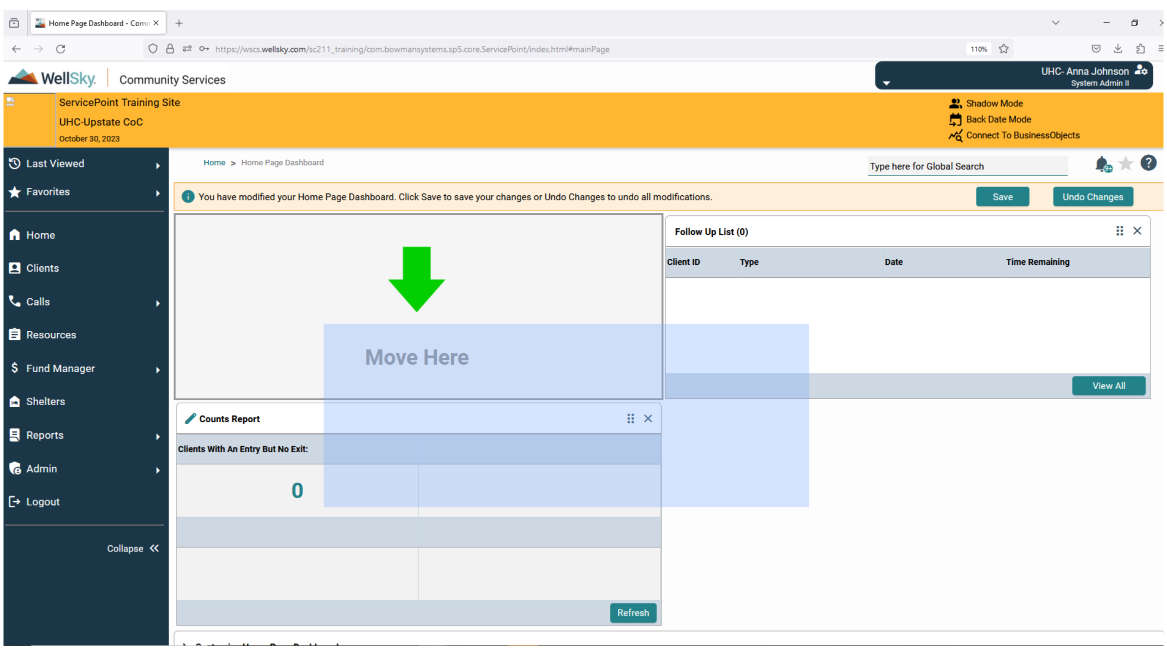
1. Log In

Section 1 - How to Move the Boxes on Your Home Page

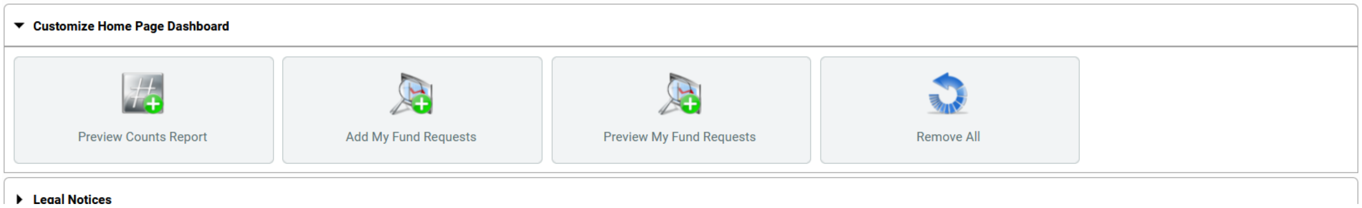
1. On the home page you will see 1-4 different sections or “boxes” that contains different information like client lists, system news, and your follow-up list.



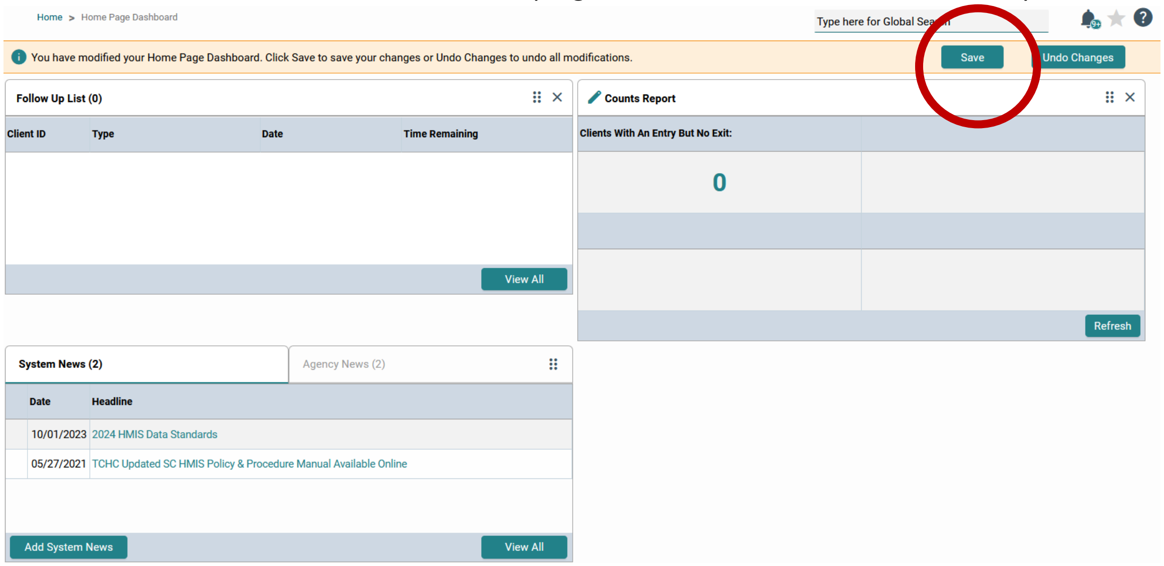
2. In order to re-arrange their order on your home page, you can move them by selecting the 6 dots in the top right corner of each box.



3. You can add/remove sections utilizing the “Customize Home Page Dashboard” on the bottom of your Home Page.



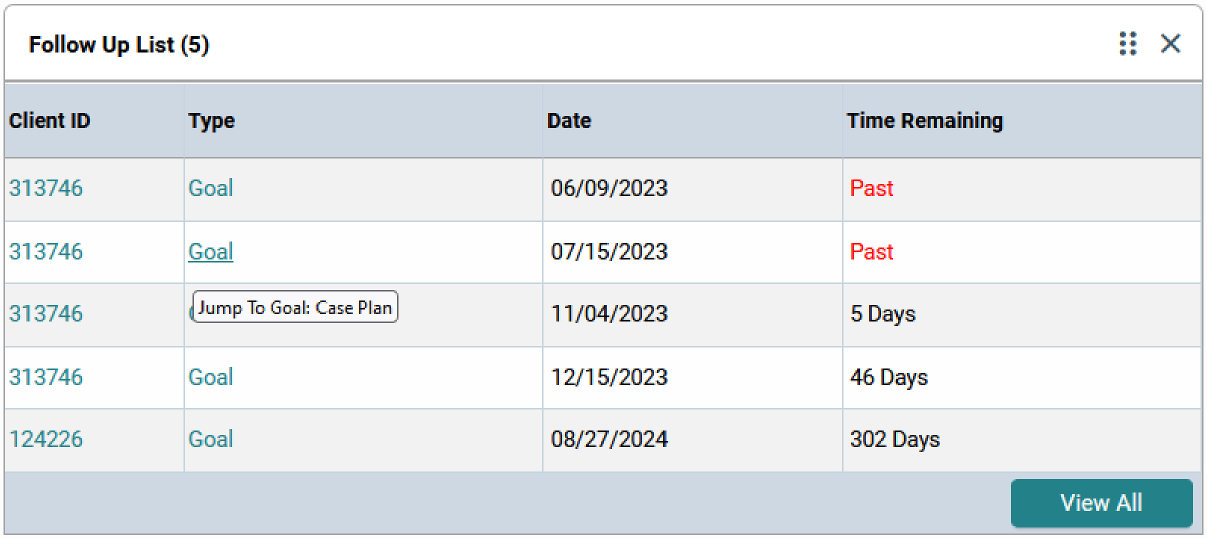
4. REMEMBER – You must click “Save” in the top right corner of the screen for this to stay.



Section 2 – How to Set/Use Your Follow-Ups Tool

1. The follow-ups tool is a fantastic tool for anyone managing clients directly. The main concept is to set a “follow-up” or reminder to do a task on the client’s profile and that reminder will show up on your profile with how many days remaining and links directly to both the client’s profile and the goal itself. Examples of how some users utilize this tool are **Street Outreach** setting reminders to remove participants who are inactive after a period of time**, Rapid Rehousing Case Managers** needing to enter in their checks as services for rental assistance, or **Permanent Supportive Housing Case Managers** scheduling Annual Assessments for their clients. Other examples may include **Shelter Staff** setting reminders to help a client order a form of ID or even scheduling a follow-up appointment for them. **Anyone can use this feature and you can select from a large list of available options or create a custom reminder yourself.**

   Example of a Follow-Up List:



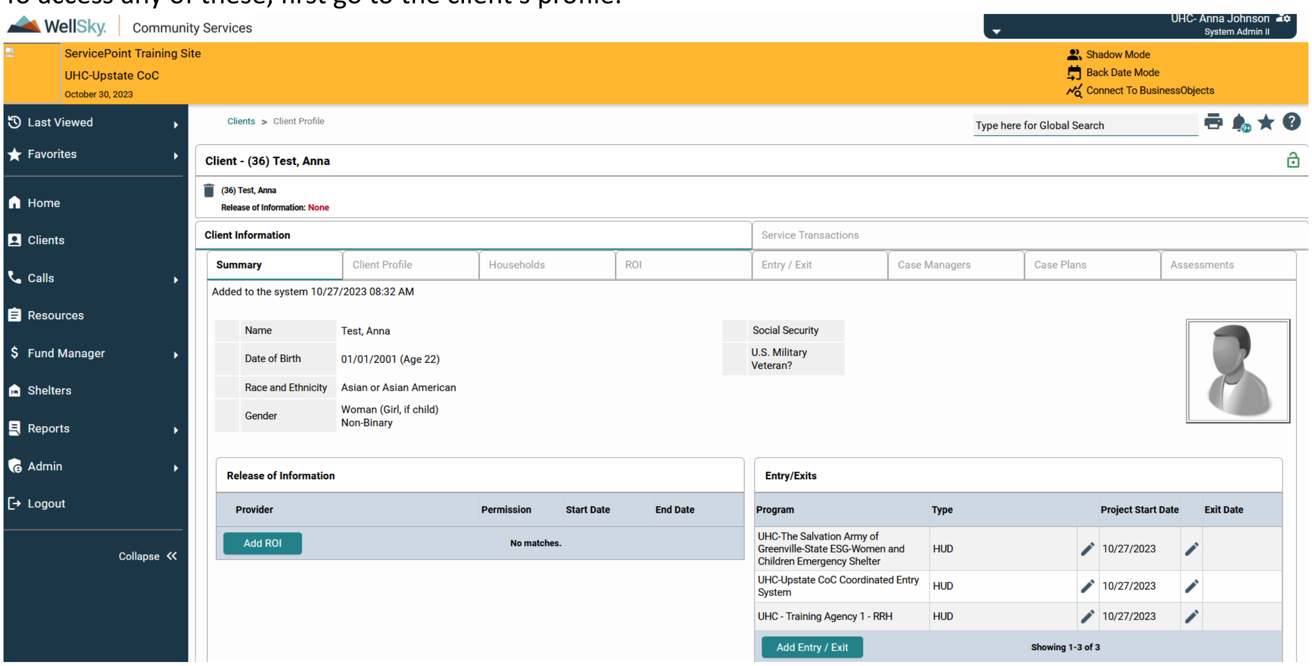
Follow Up List (5)

Client ID	Type	Date	Time Remaining
313746	Goal	06/09/2023	Past
313746	Goal	07/15/2023	Past
313746	Jump To Goal: Case Plan	11/04/2023	5 Days
313746	Goal	12/15/2023	46 Days
124226	Goal	08/27/2024	302 Days

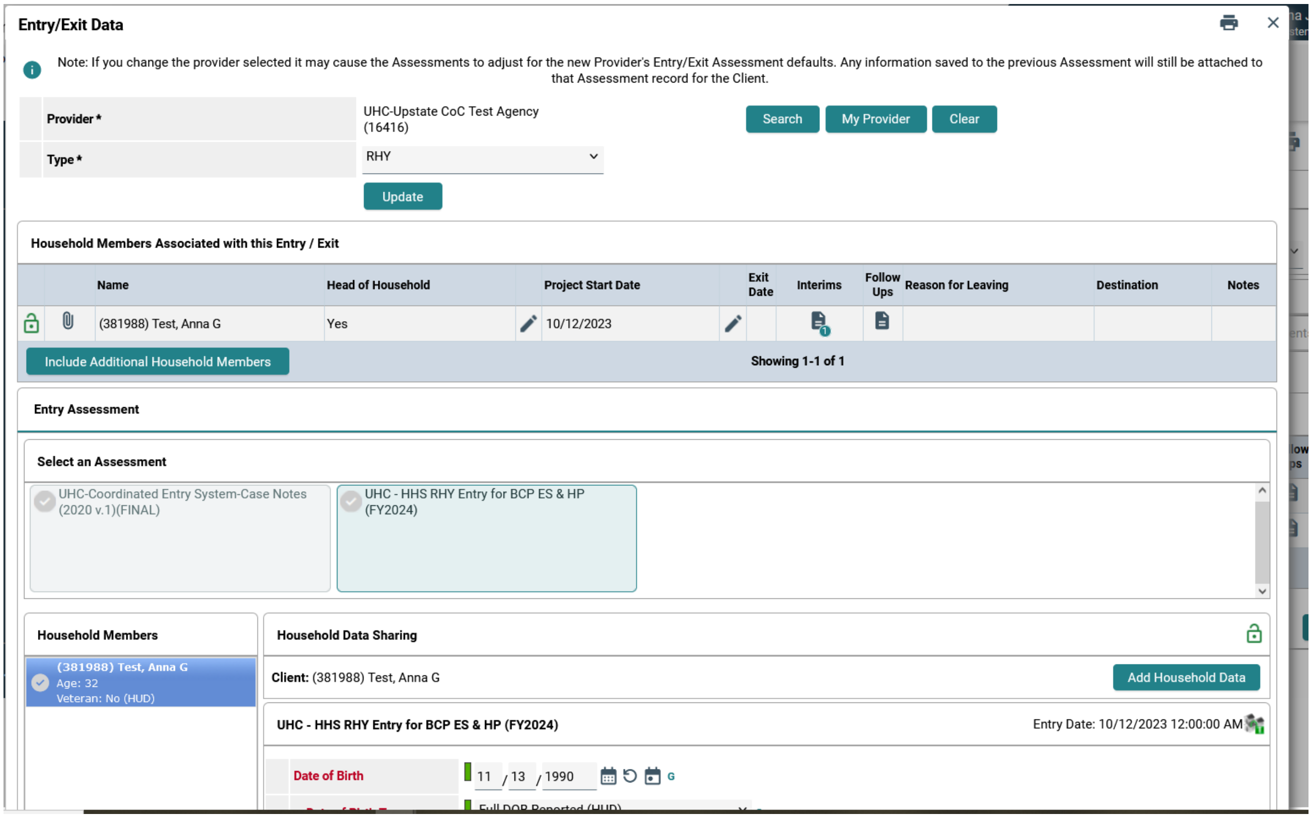
View All

2. There are three locations where a Follow-Up can be set.
   - Assessments
   - Services
   - Case Plans

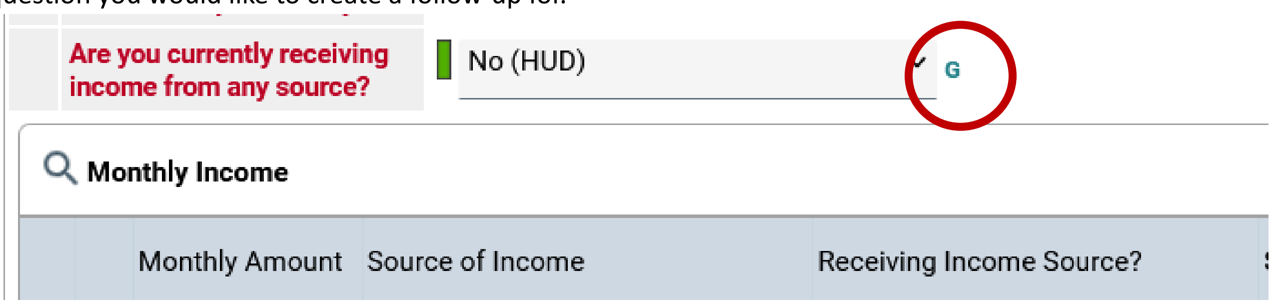
3. To access any of these, first go to the client's profile.



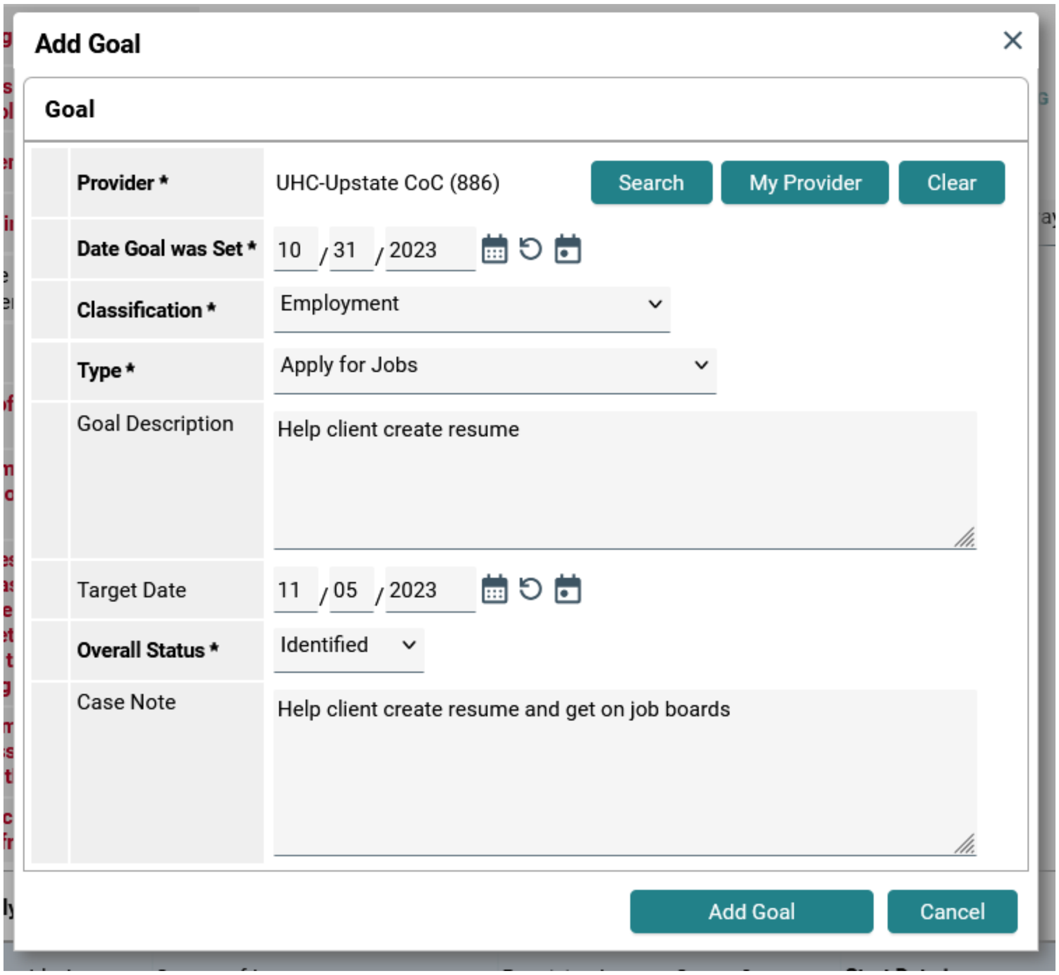
4. We will look at Assessments first. Go to the client's profile and select an assessment (this can also be done while creating a new assessment like a project Entry or an Interim Update.



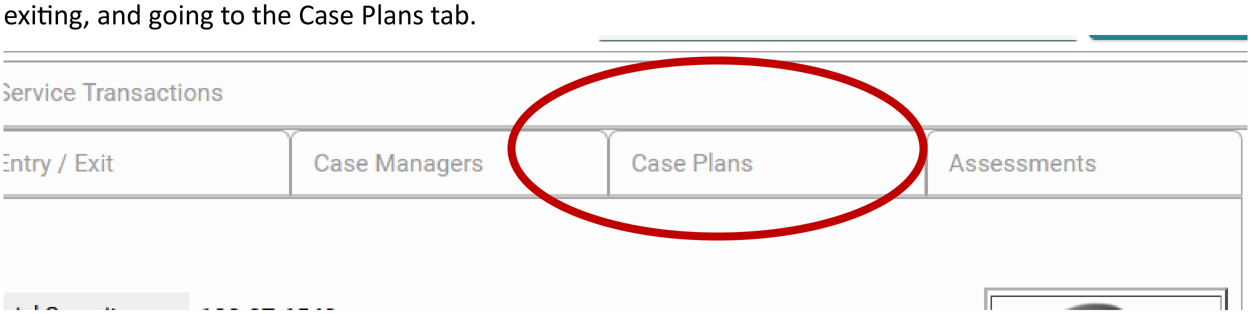
5. Next, you will notice that there is a small green "G" next to questions on the assessment and select one next to a question you would like to create a follow-up for.



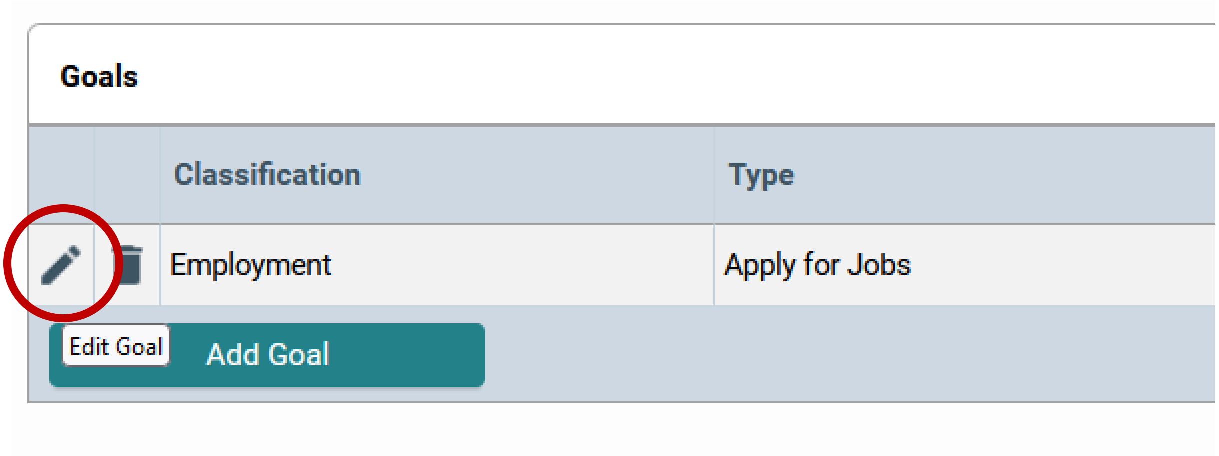
6. You can then add a “Goal.”



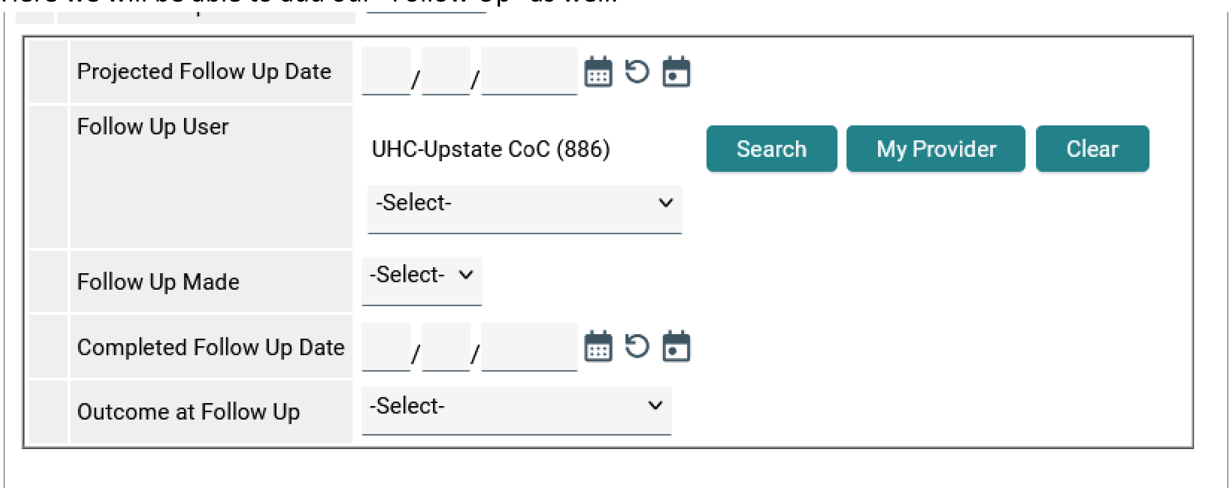
7. Once your goal is added on the assessment, you can then ad the follow-up reminder to this goal by saving and exiting, and going to the Case Plans tab.



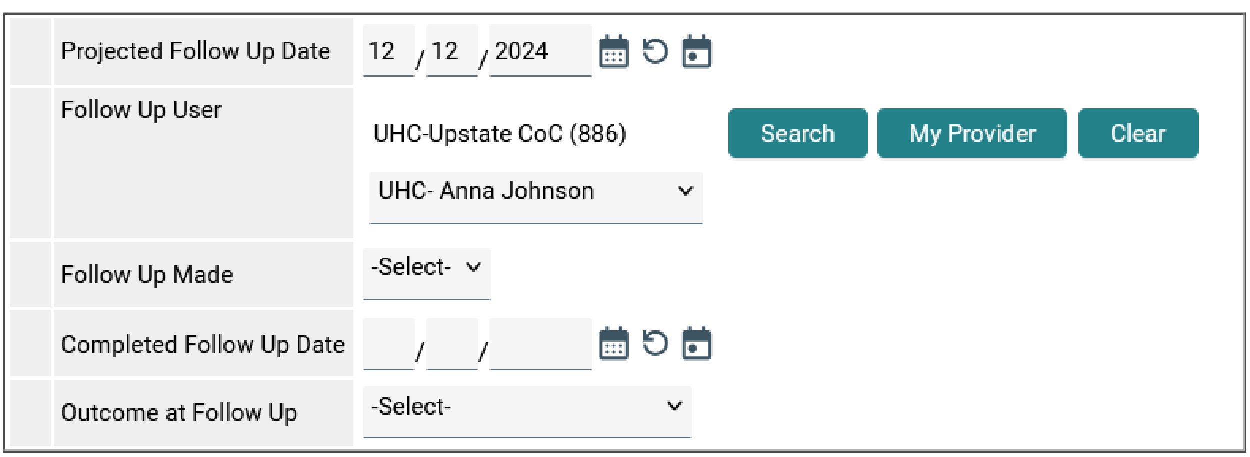
8. Once on the Case Plans tab, you will select the goal you've just created by clicking the pencil icon next to it.



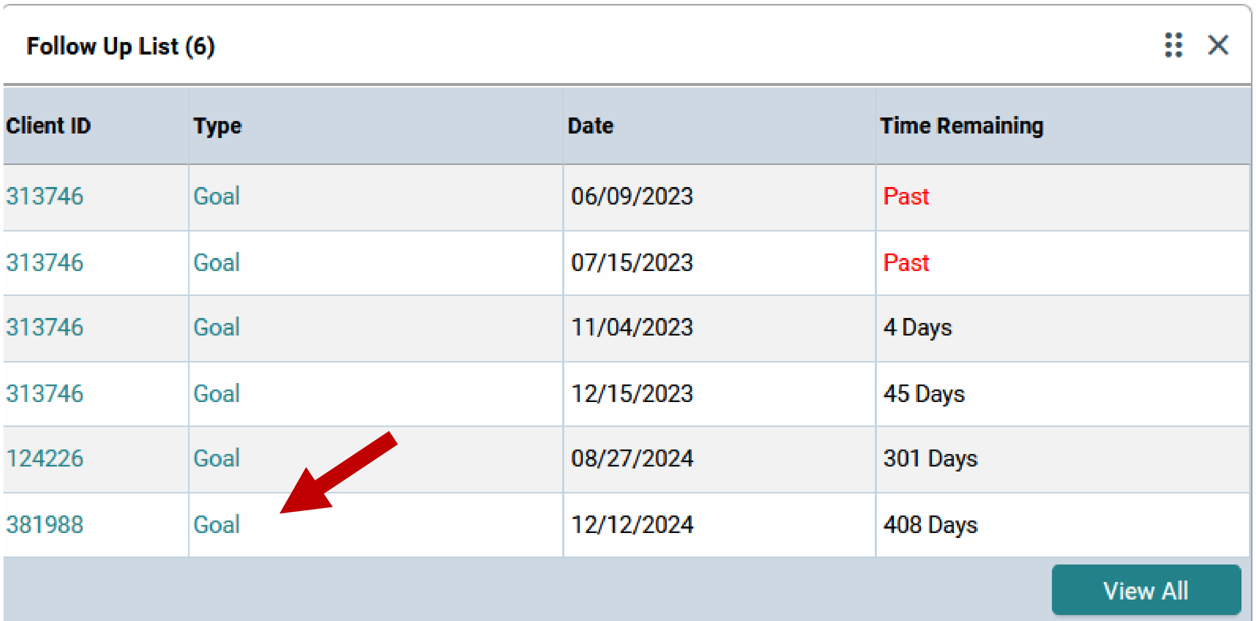
9. Once you click the pencil you will see all of the information you added during creation of the goal, as well as a number of other fields where you can add additional information like Case Notes, Action Steps, or even Services. Here we will be able to add our "Follow Up" as well:



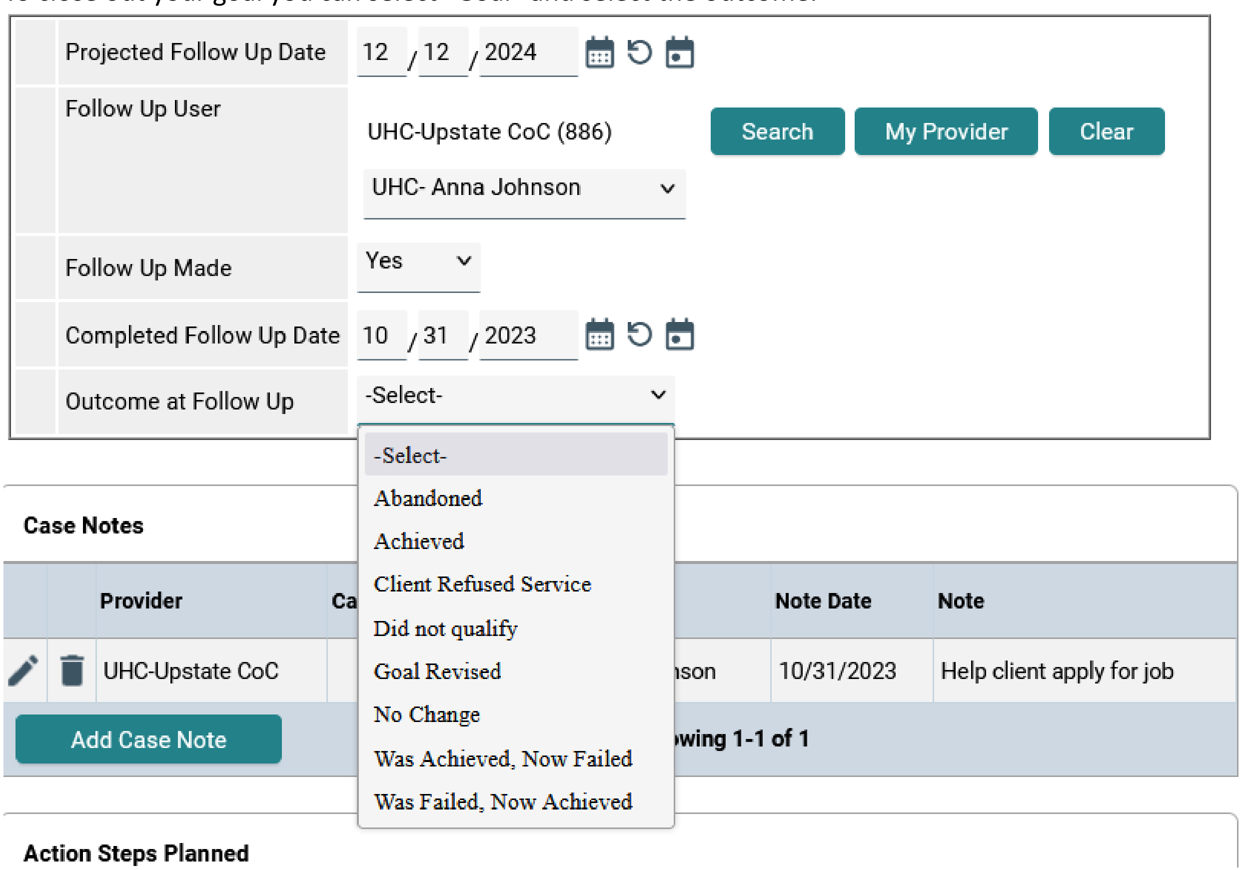
10. To then add the Follow Up, you will add the projected Follow Up Date which is the day that the system will count down to. For example, if it's Monday, and you want to follow up on Thursday, the date you would enter would be Thursday. If you wanted the task complete by Thursday, you may want to set your Follow Up a day or two early to give you time to actually complete the task.
11. To add to your profile, you will only need to fill out the first three boxes.



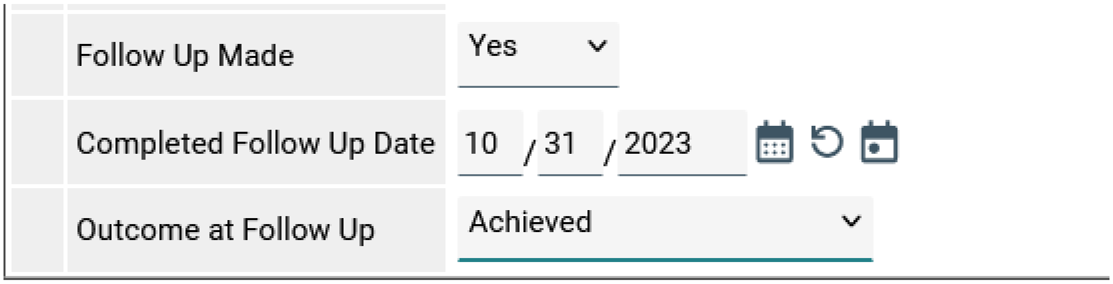
12. Then save and exit.
13. Return to your Home page to view your goal and how many days you have left.



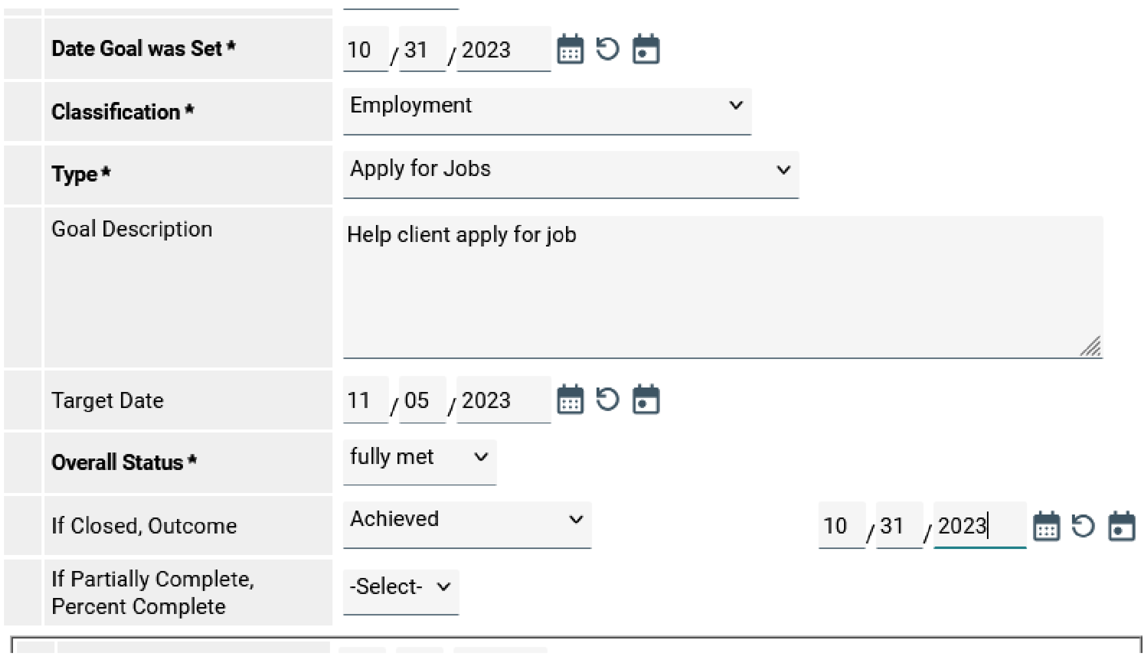
14. To close out your goal you can select "Goal" and select the outcome.



15. Once filled out, you can close your follow-up section as well as the goal itself.
Follow Up:

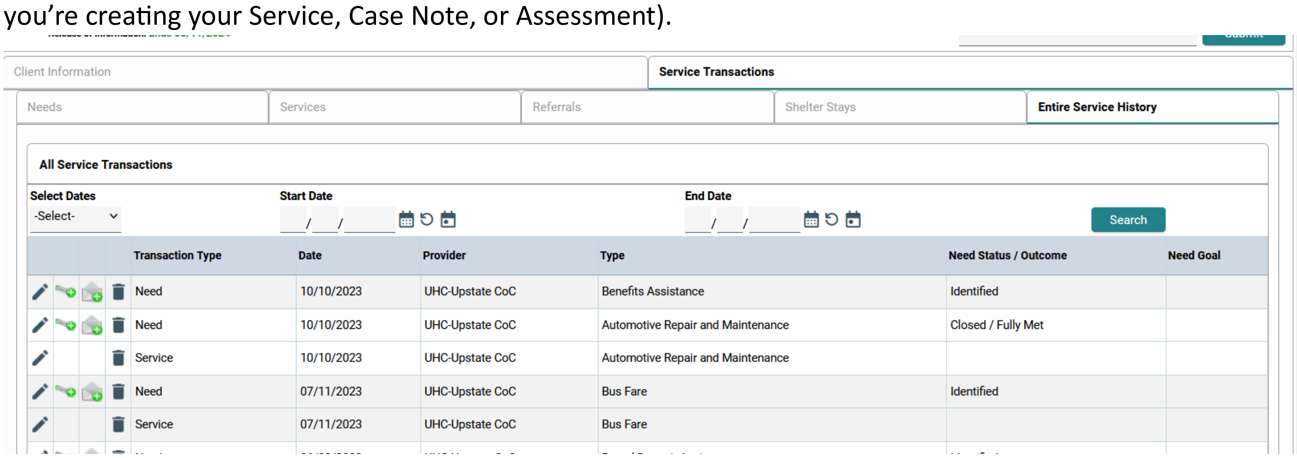


Goal:

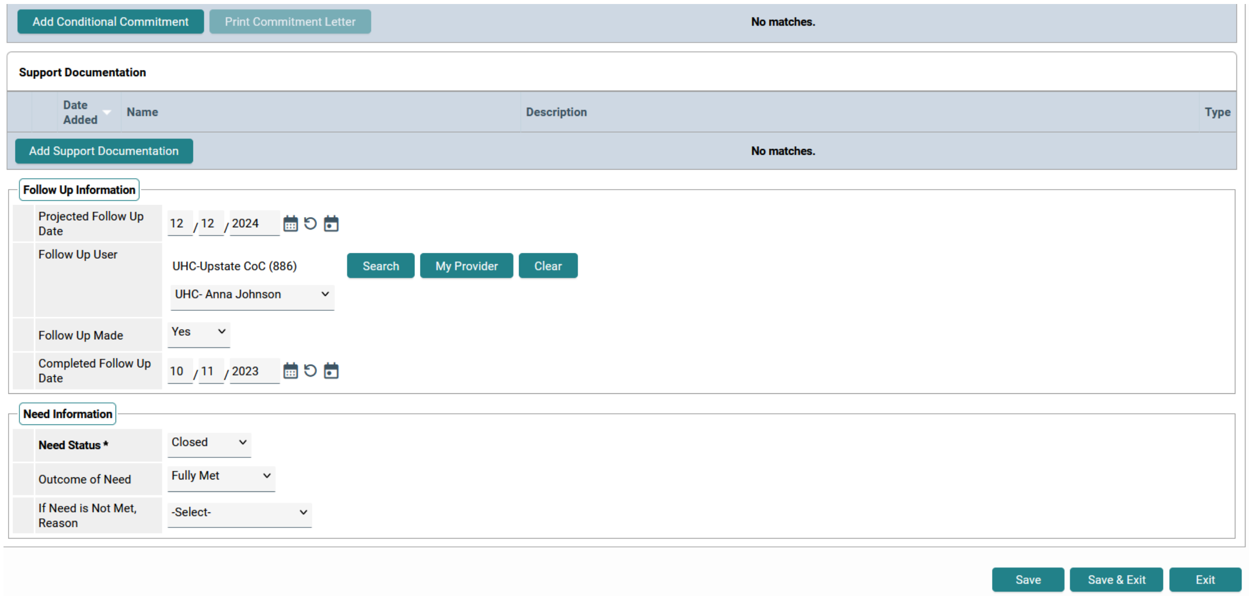


16. Save and exit.

17. Follow Ups can also be set for Services and Case Plans using the same instructions as above. For Case Plans, follow the above instructions from the Case Plan section down. For Services, you should go to the Services Tab and click the pencil icon next to the service you would like to add the follow-up to (again, this can be done while you're creating your Service, Case Note, or Assessment).

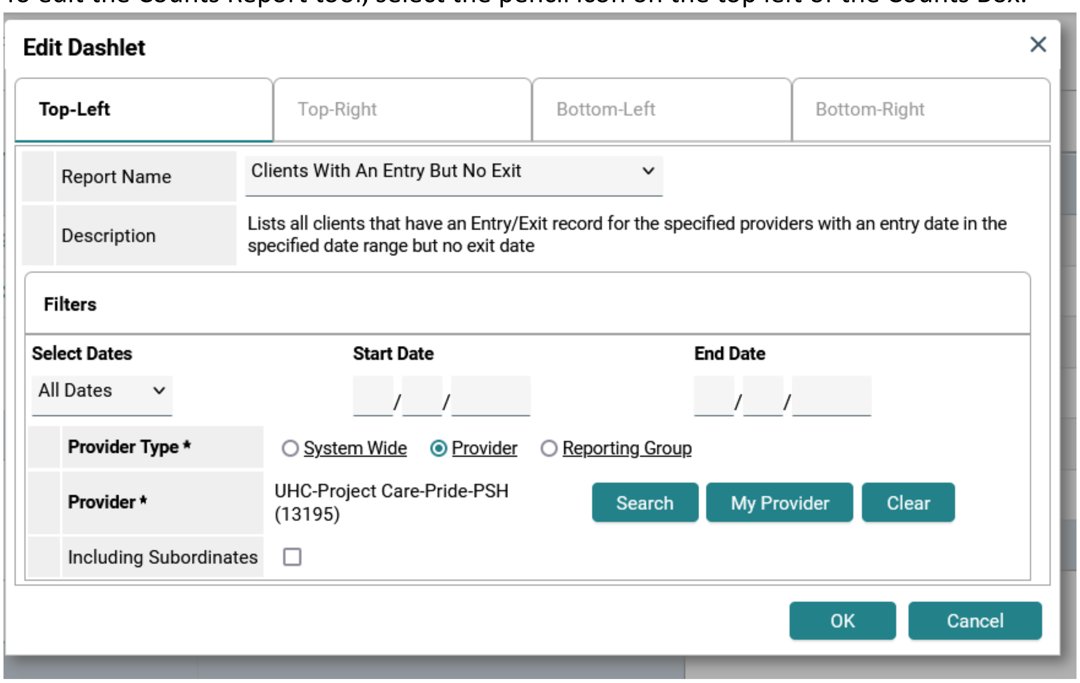


Once you've clicked the pencil icon to edit the Service, you can then scroll down to the Follow Up section and add your Follow Up to your profile. Save & Exit.



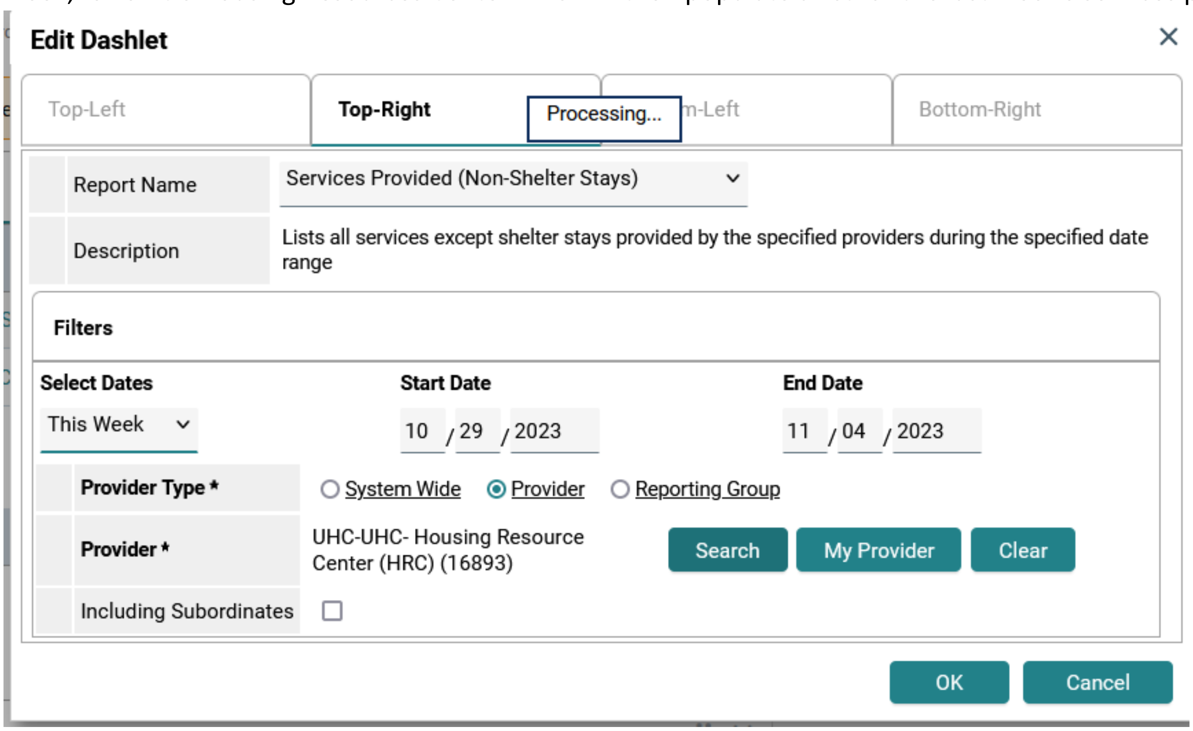
Section 3 - How to Utilize Your Counts Report Tool

1. To edit the Counts Report tool, select the pencil icon on the top left of the Counts Box.

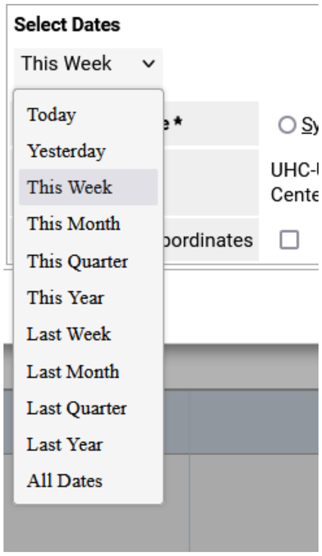


2. Here you can navigate between the 4 quadrants and add up to 4 pieces of information. In the image above, I have set to view a list of all of the Active Clients in the Project Care-Pride-PSH program in my top left quadrant. This was done by selecting "Clients With An Entry But No Exit" in the report Name, selecting "All Dates" and selecting the Provider (or Project) I wanted the report to pull from. Below I'll list some other tools/ideas for information that can be added to these boxes.
3. The first section we'll look at is the Program Manager Reports Options. Here you can see you can view things line Clients Served, Shelter Stays Provided, and Services Provided.

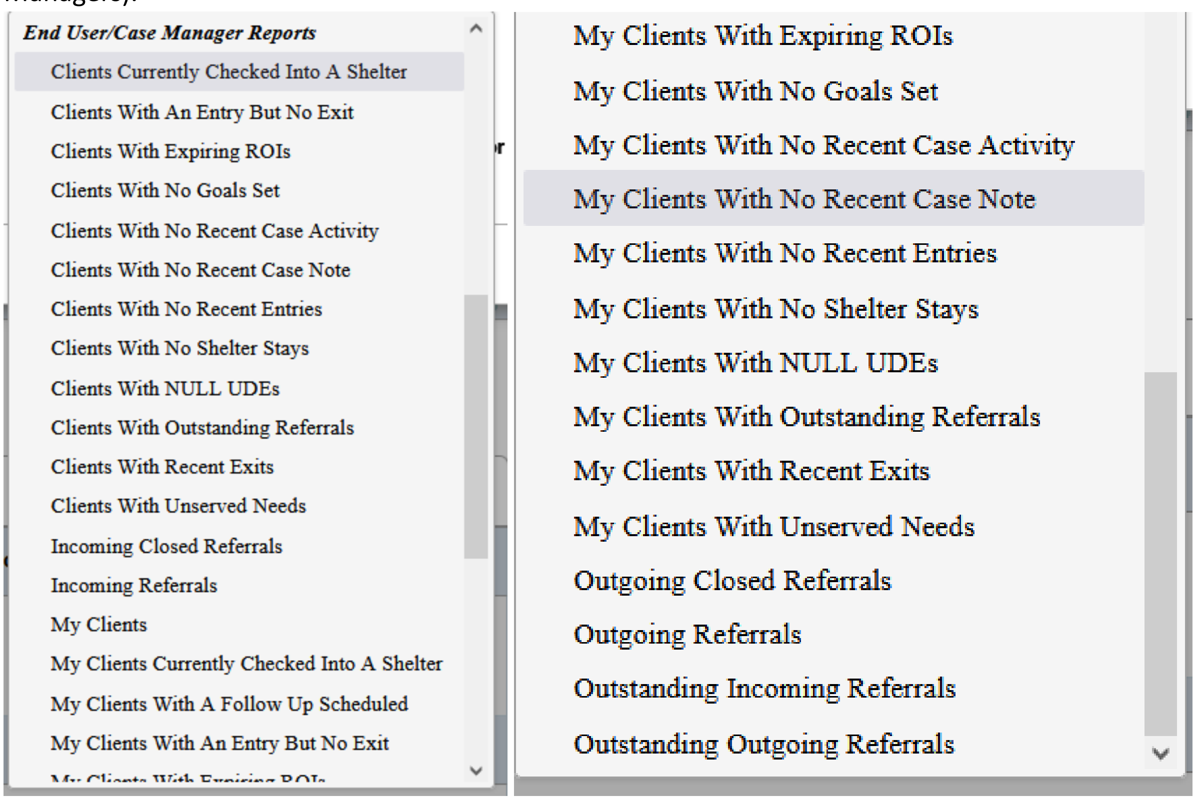
4. As an example, in the image below I have selected to view all of the clients with services provided in the last week, for UHC's Housing Resources Center. This will then populate a list for the last week's services provided.



Other timeframes are available for most reports, including this one:

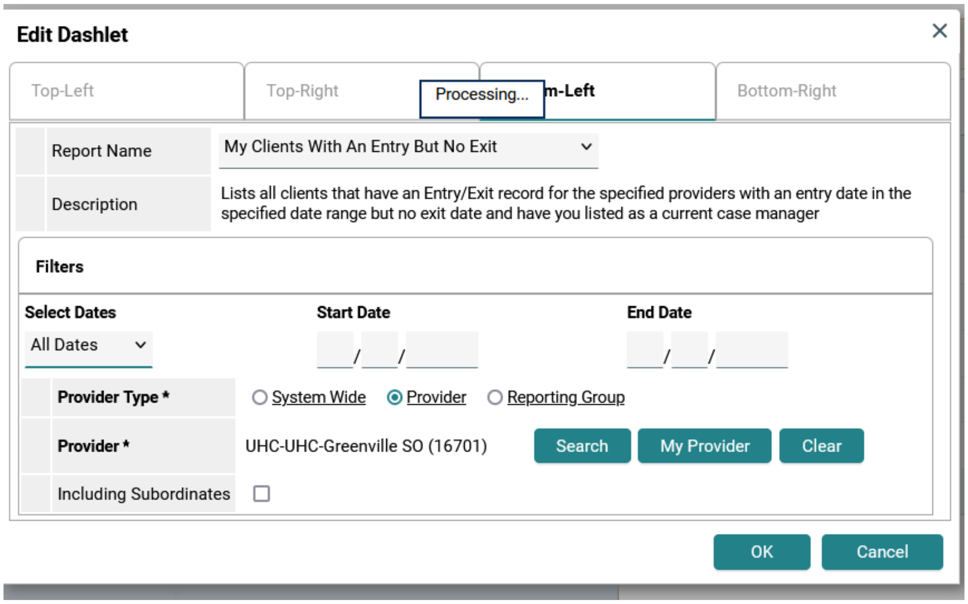


5. The next section we'll take a look at is the Case Manager/Advocate Section (also useful for Program Managers).



6. As you can see there are many phenominal options. It's just important you take the time to think through the time frame you want to select and what project/s you want to add. If you're doing your entire Agency, you can choose your Agency-Level project for the provider and also select "Including Subordinates." If you're wanting to look at a project on it's own, you must be sure to selec the specific project under the Provider Type. If you would like multiple projects, but not your whole agency, your System Admin can put them in a

reporting group for you.



7. I recommend trying some of these items out when you have time and if you need any further assistance, please submit a ticket on our website.