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 setup of the Assessments Due Widget

Removed for Instruction
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
Customizing a Widget

• After you update the filters of your Widget, press **Refresh**
Customizing a Widget

• The filtered results will now appear
Customizing a Widget

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

• Or you may create and add another Widget by pressing **Add Widget**
Adding an Additional Widget

• In the example below we added a new Activities Due Widget
Adding an Additional Widget

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

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)
Creating a Service Delivery Saved Search

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

• In the next window, the user will update the search criteria so that the proper information is displayed.
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 Care Management Appendix F.4.
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**
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.

![](Saved Searches.png)

Care Management Appendix F.4.
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.
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**
Adding a Saved Search to Dashboard

- Users will then need to press **Open** on the Saved Search Definition screen.
Adding a Saved Search to Dashboard

• This will allow the users to change the date range as needed to keep widget beneficial.
Adding a Saved Search to Dashboard

• Once necessary changes have been made, click **Save and Close**
Adding a Saved Search to Dashboard

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

Removed for Instruction
Adding a Saved Search to Dashboard

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