PENNSYLVANIA DEPARTMENT OF AGING

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

Training Goals

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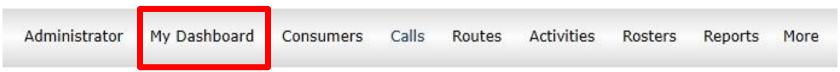
- Learn how to access your Dashboard

- Learn how to create, modify, and add a Widget to your Dashboard

- Learn how to create and add a Saved Search to your Dashboard

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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
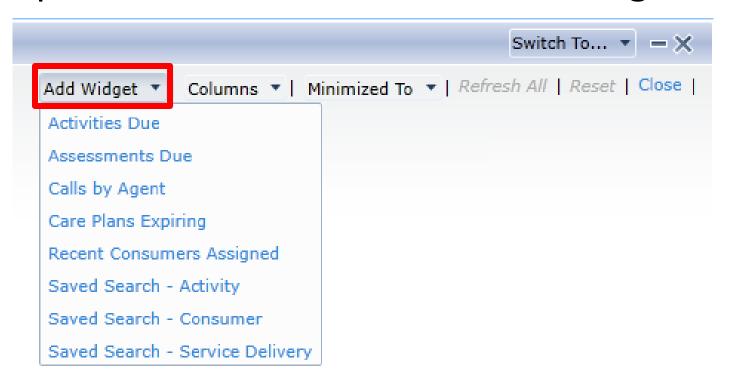 - Saved Search – Service Delivery

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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
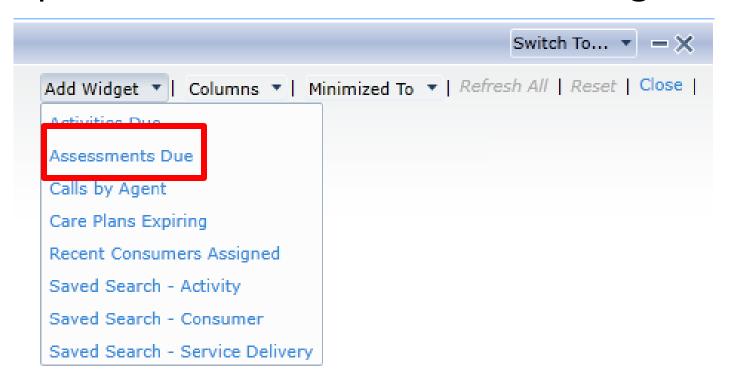 - Cannot pull data from assessment forms (i.e., NAT, NAT-E, CAT, RON, etc.)

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Adding a Widget

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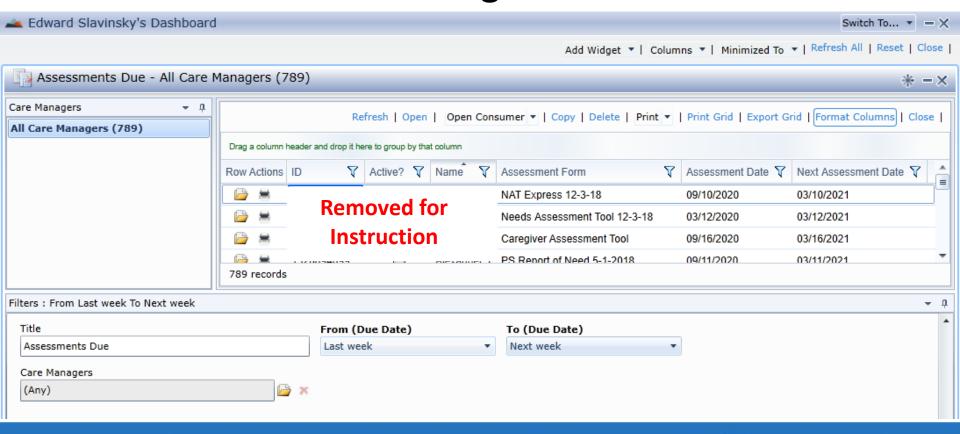
Adding a Widget

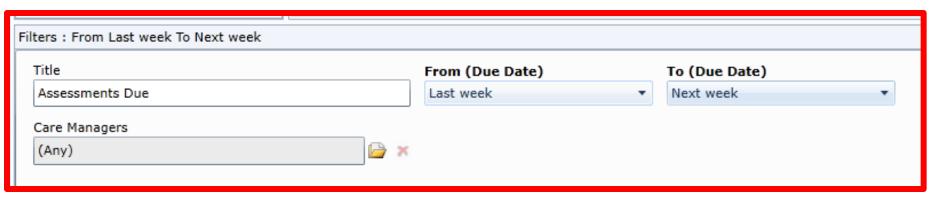- In your Dashboard, click on the **Add Widget** dropdown and select the desired Widget

Adding a Widget

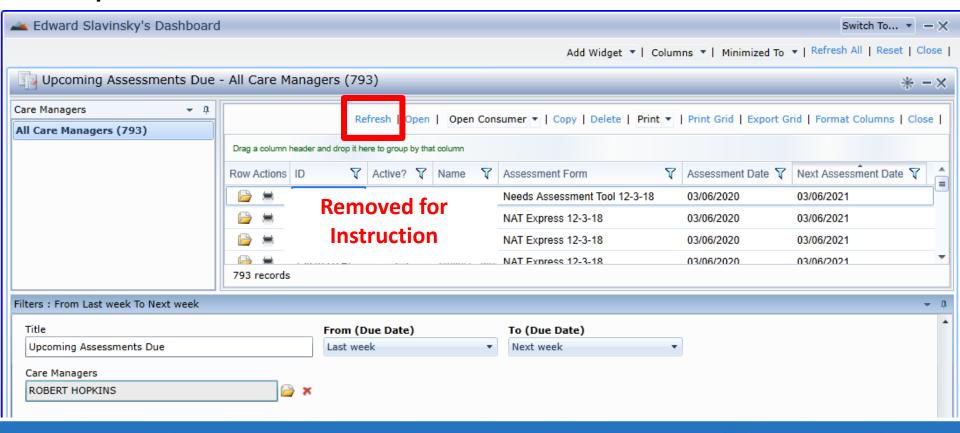- This example shows the initial set up of the **Assessments Due** Widget

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
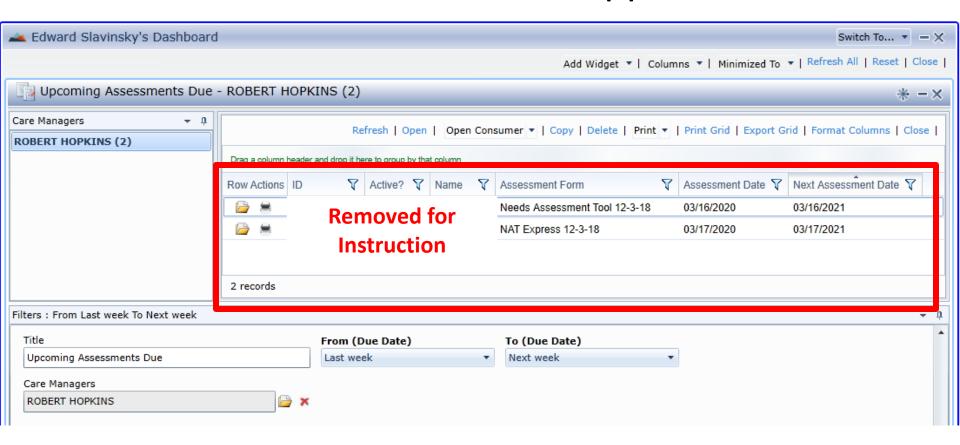   - Care Managers can also edit to only see themselves

Filters : From Last week To Next week

Title	From (Due Date)	To (Due Date)
Assessments Due	Last week ▼	Next week ▼

Care Managers

(Any)

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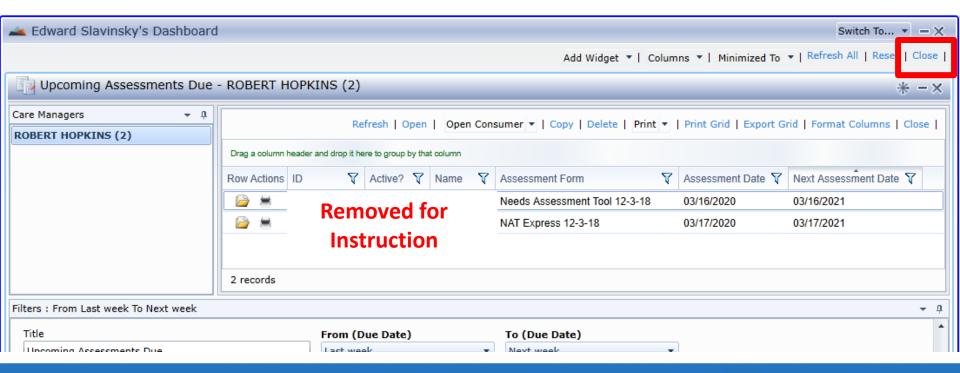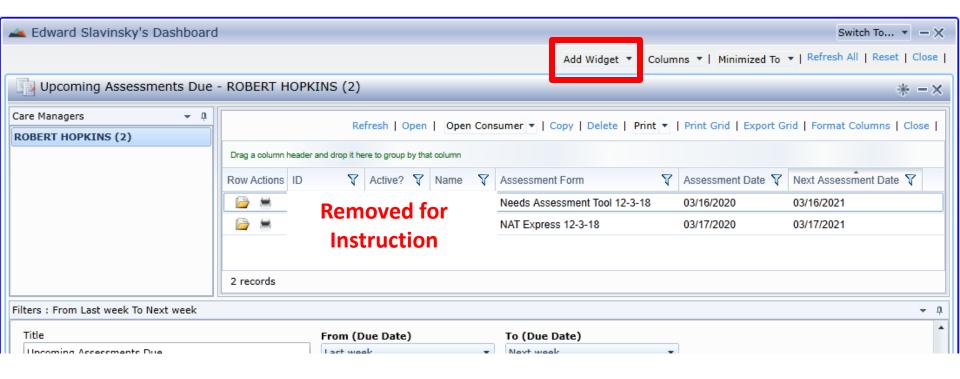
- You can press **Close** and this Widget will appear the next time you open your dashboard with the filters saved
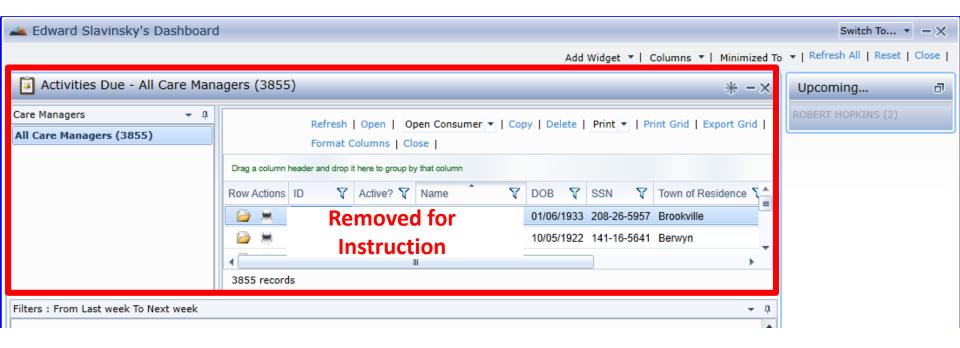
Adding an Additional Widget

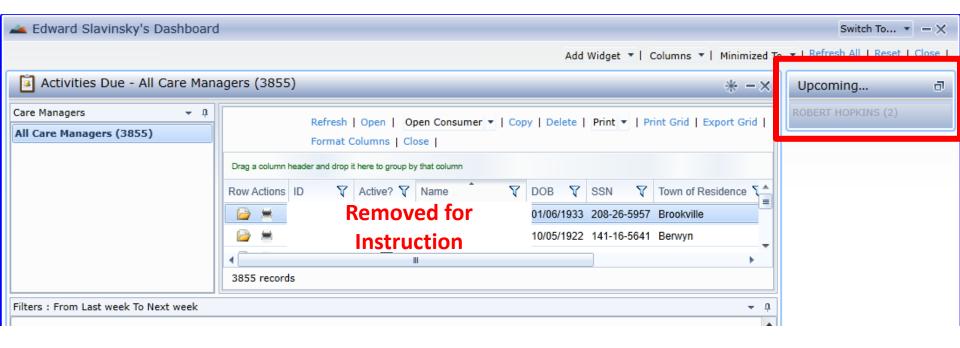- Or you may create and add another Widget by pressing **Add Widget**

Adding an Additional Widget

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

Adding an Additional Widget

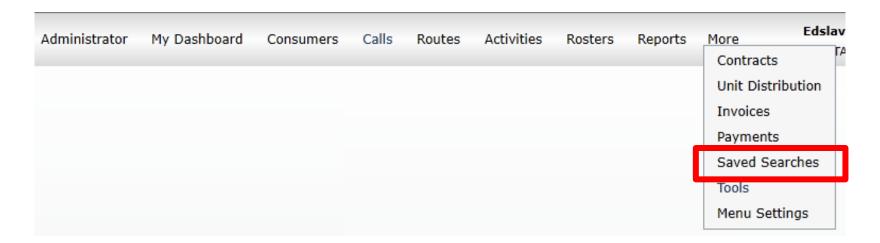- Notice that your other widget is now minimized but remains accessible

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
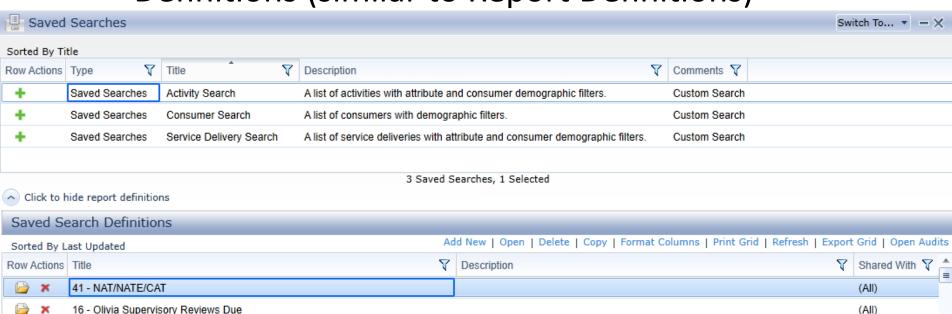- Saved Searches must be created before they are available for selection in the Dashboard

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Creating a Saved Search

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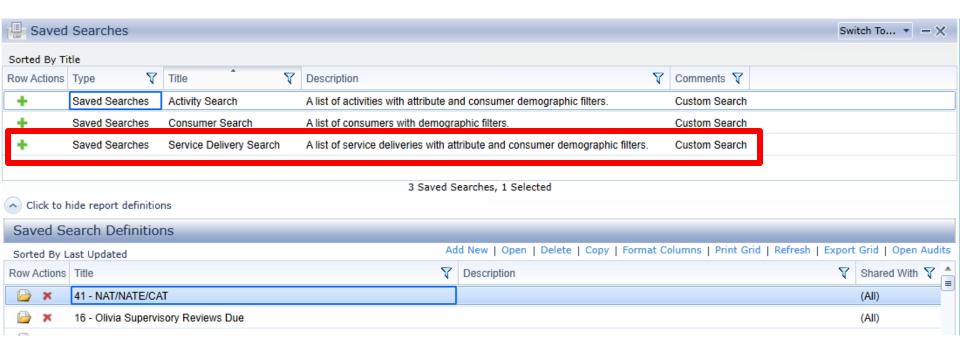
Creating a Saved Search

- 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)
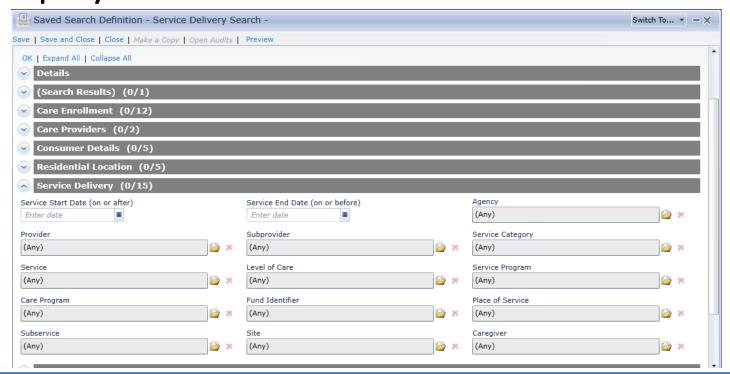
Creating a Service Delivery Saved Search

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

Creating a Service Delivery Saved Search

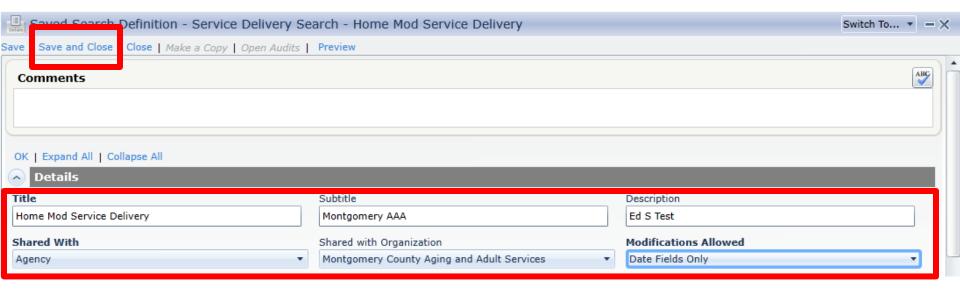- In the next window, the user will update the search criteria so that the proper information is displayed

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

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,
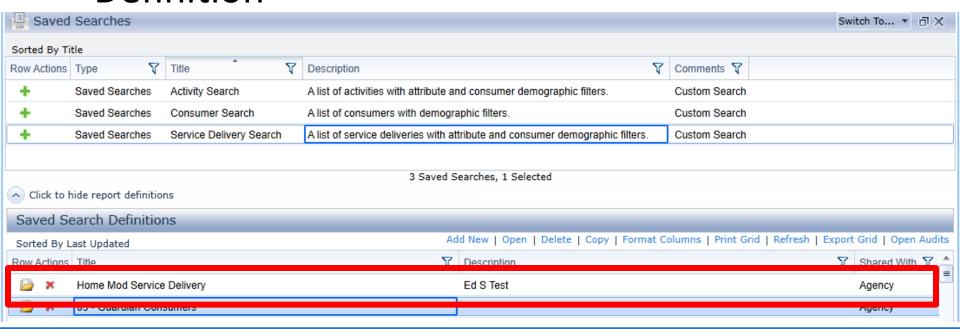 - Identify which fields are allowed to be modified.

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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
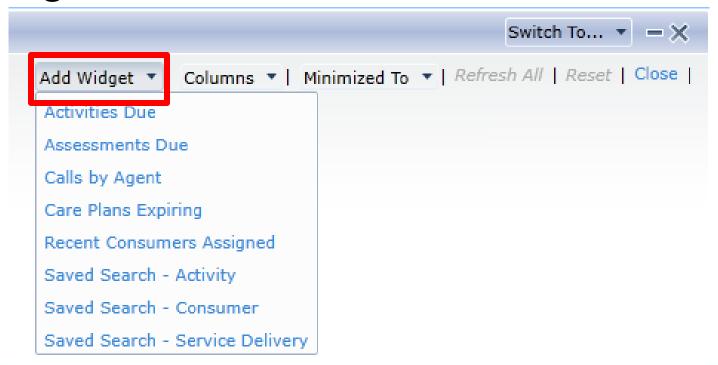
Adding a Saved Search to Dashboard

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

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Adding a Saved Search to Dashboard

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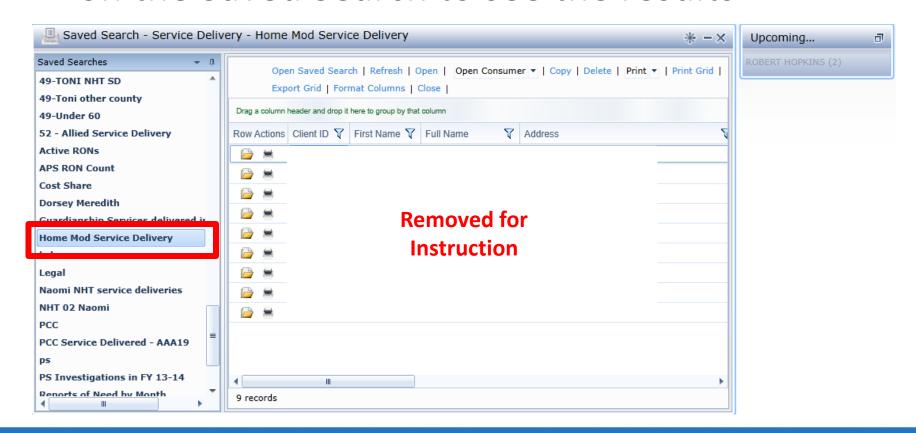
Adding a Saved Search to Dashboard

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

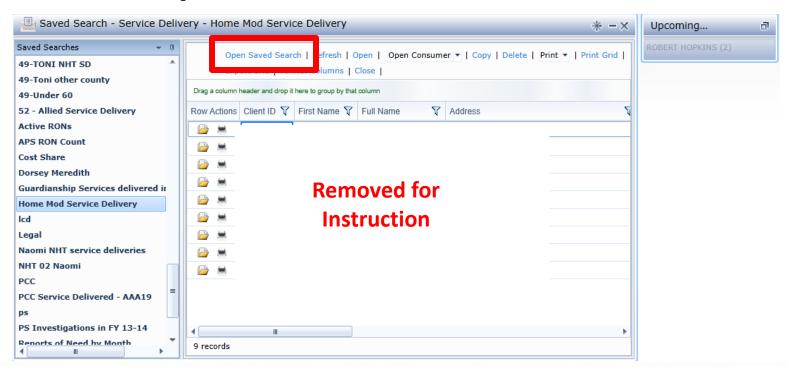# Adding a Saved Search to Dashboard

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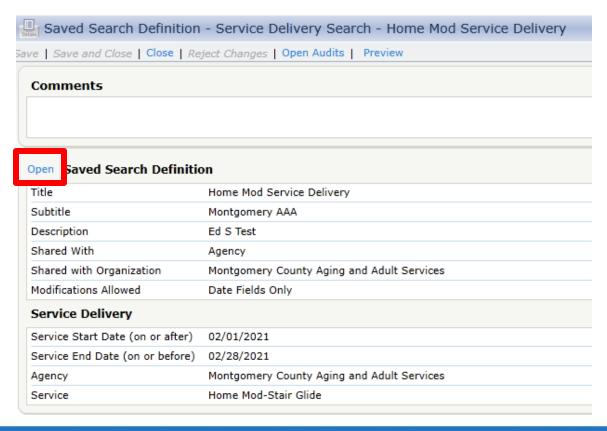
Adding a Saved Search to Dashboard

- 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

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

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
Companion Guide Sept2018   ⬇ *(pdf, 1.602mb)*

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