



# My Dashboard – ITM Job Aid

The Dashboard is the first screen that appears after logging into the Integration and Teaming Meeting (ITM) application. This screen allows users to access *Referrals*, *Pending Feedback*, *Meetings* and *Reminders* depending on the user's role in ITM.

## My Dashboard

Dashboard Search Admin Jane Smith

My Dashboard

Assigned Worker My Dashboard

▼ Pending Referrals (9)

New Referral

Search:

Referral Date	Referral ID	First Name	Last Name	Referred By	Referral Reason	Source
4/27/2016	<a href="#">2256</a>	Jack	Smith	Amy Jones	Systems Consultation	KIDS
4/22/2016	<a href="#">2145</a>	Steven	Thomas	Amy Jones	Special Requests	KIDS
4/15/2016	<a href="#">1938</a>	Mary	Sue	Jeff Thompson	Intellectual Disability Residential/Family Living	KIDS

Show 10 entries First Previous 1 Next Last

▶ Active Referrals (8)

▶ Pending Feedback(0)

▶ Meetings(0)

▶ Reminders(0)

## Navigation

- The **Dashboard** button can be found at the top of every ITM screen. Clicking on the **Dashboard** button or the ITM logo [  ] at the top of every screen will also navigate the user to the Dashboard.

## Basic Dashboard Elements

**Active Referrals (35)**

**Filters:**  All  Action Items  Follow-up Items

**Sort Indicator:** Referral Date, Referral ID, First Name, Last Name, Referred By, Category, Source, Worker, Status } **Headers**

**Search:** Search:

Referral Date	Referral ID	First Name	Last Name	Referred By	Category	Source	Worker	Status
12/3/2015	<a href="#">1069</a>	Crystal	Smith	Janet Jones		LINK	Andrew Troy	Assigned
11/30/2015	<a href="#">1029</a>	Earley	Smythe	Janet Jones		LINK	Andrew Troy	Assigned
11/30/2015	<a href="#">1025</a>	Mary	Martinson	Andrew Troy	Homeless	HCM	Andrew Troy	Accepted
11/19/2015	<a href="#">967</a>	David	Davidson	Andrew Troy		HCM	Andrew Troy	Accepted
11/18/2015	<a href="#">951</a>	Bob	Robertson	Janet Jones		LINK	Andrew Troy	Accepted

**Paginator:** Show  entries First Previous 1 2 3 4 Next Last

- **Filters:** Grids with Filter radio buttons can be narrowed down to the filtered categories.
- **Headers:** Identify what type of information can be found in the grid columns.
- **Search:** These search fields can filter the grid down to any grid item containing all or part of a word, date, or number.
  - The filter will only apply to text and numbers that are contained within the grid itself. For example: Typing "LINK" will filter the list to all Referrals with a source of *LINK*.
  - This search also accepts partial entries. For example, typing "10" will filter this list to include Referrals *1069*, *1029*, and *1025*. Typing "And" will bring up all Referrals assigned to *Andrew Troy* or Referred By *Andrew Troy*.
  - To clear the search results, click the **X** that appears to the right inside the search field or delete the search terms.
- **Sort Indicator:** This indicates what direction the Header in the grid is sorted in to. To sort the list on a specific Header click on the Header. The sort indicator will point upward for ascending order and downward for descending order .
- **Hyperlinks:** Hyperlinks within the grid will open the item in the grid. Clicking on [1029](#) will open Referral# 1029.
- **Pagination:** Longer lists will be separated into pages. These pages can be navigated through using the **First Previous 1 2 3 4 Next Last** links at the bottom-right of the grid. To the bottom-left of the grid is a drop-down option that allows you to change the number of grid entries displayed per page.

## My Dashboard

Dashboard Search Admin Jane Smith

### My Dashboard

Assigned Worker: My Dashboard

**Pending Referrals (9)**

New Referral

Search:

Referral Date	Referral ID	First Name	Last Name	Referred By	Referral Reason	Source
4/27/2016	<a href="#">2256</a>	Jack	Smith	Amy Jones	Systems Consultation	KIDS
4/22/2016	<a href="#">2145</a>	Steven	Thomas	Amy Jones	Special Requests	KIDS
4/15/2016	<a href="#">1938</a>	Mary	Sue	Jeff Thompson	Intellectual Disability Residential/Family Living	KIDS

Show 10 entries First Previous 1 Next Last

- Active Referrals (8)
- Pending Feedback(0)
- Meetings(0)
- Reminders(0)

1. After selecting *Integration and Teaming Meeting* on the Synergy Splash screen the user will be taken directly to the **Dashboard**. The chevrons [➤ ▼] can be used to expand or collapse the panes; only one pane can be expanded at a time. The title of each pane also contains the number of items in that pane in parentheses, for example: ➤ **Reminders (5)**.
  - a. *Assigned Worker*: For all users except Admin (ITM Manager) this drop-down will be locked to "My Dashboard" and will only show items assigned to that user.
    - i. The Admin (ITM Manager) can select other ITM users from the *Assigned Worker* drop-down to view that user's Dashboard. Selecting "View All" from the drop-down will display information from all of the ITM user's dashboards.



- b. *Pending Referrals* contains all of the ITM Referrals that have not yet been accepted. Only Admin and Admin Support users will be able to view *Pending Referrals* and use the **New Referral** button.

To navigate to a specific Referral, click on the *Referral ID* in the grid.

Pending Referrals (9)						
New Referral						
Referral Date	Referral ID	First Name	Last Name	Referred By	Referral Reason	Source
4/27/2016	<a href="#">2256</a>	Jack	Smith	Amy Jones	Systems Consultation	KIDS

- c. *Active Referrals* displays all of the active Referrals assigned to the user. To navigate to a specific Referral click on the *Referral ID* in the grid.

Active Referrals (8)											
Referral Date	Referral ID	First Name	Last Name	Referred By	Referral Reason	Category	Source	Worker	Status	FeedBack	
4/11/2016	<a href="#">1599</a>	Mary	Sue	Jane Smith	Other	Crisis	ITM	Jane Smith	Accepted		

- i. If a Referral has new feedback entered by another user a will appear below the *Referral Date*. If a Referral is court ordered an will be visible in the *Referral Reason* column.
  - ii. To view or add feedback while remaining on the *Dashboard* screen click on the feedback icon [ ] in the *FeedBack* column.
- d. *Pending Feedback* displays all of the Referrals that require feedback from the user. To navigate to a specific Referral, click on the *Referral ID* in the grid.

Pending Feedback(5)							
Referral Date	Referral ID	First Name	Last Name	Referred By	Referral Reason	Source	FeedBack
4/27/2016	<a href="#">2253</a>	SAGE	HOOVER	Amy Jones	Child/Family Request	KIDS	

- i. To view or add feedback while remaining on the *Dashboard* screen click on the Feedback icon [ ] in the *FeedBack* column.
- ii. Once the user has documented feedback for a Referral that Referral will disappear from the *Pending Feedback* grid.



- e. *Meetings* displays all of the scheduled or rescheduled meetings where the user is designated as the Facilitator.

Meetings(3)							
Meeting Date	Meeting Time	Facilitator	Source System	Invite Sent?	Referral Date	Referral ID	Client
<a href="#">5/10/2016</a>	12:00 PM	Jeff Thompson	ITM	Y	4/13/2016	<a href="#">1656</a>	Mary Sue

- i. Clicking on the *Meeting Date* for a Referral will navigate the user directly to that specific Meeting the *Meeting* in the Referral.
  - ii. Clicking on the *Referral ID* will navigate the user to the *Referral Information* screen for the Referral.
- f. *Reminders* displays all of the user's assigned *Action Items* and *Follow-Up Items* with a status of *In Progress* or *On Hold*.

Reminders(5)						
<input checked="" type="radio"/> All <input type="radio"/> Action Items <input type="radio"/> Follow-up Items						
Type	Client Name	Meeting Date	Action Step	Responsible Person	Target Date	Status
Follow-Up	SAGE HOOVER	<a href="#">4/20/2016</a>	check-in every day	Jeff Thompson	4/25/2016	In Progress
Action Item	LUKE HOOVER	<a href="#">4/4/2016</a>	locate provider	Amy Jones	5/5/2016	In Progress

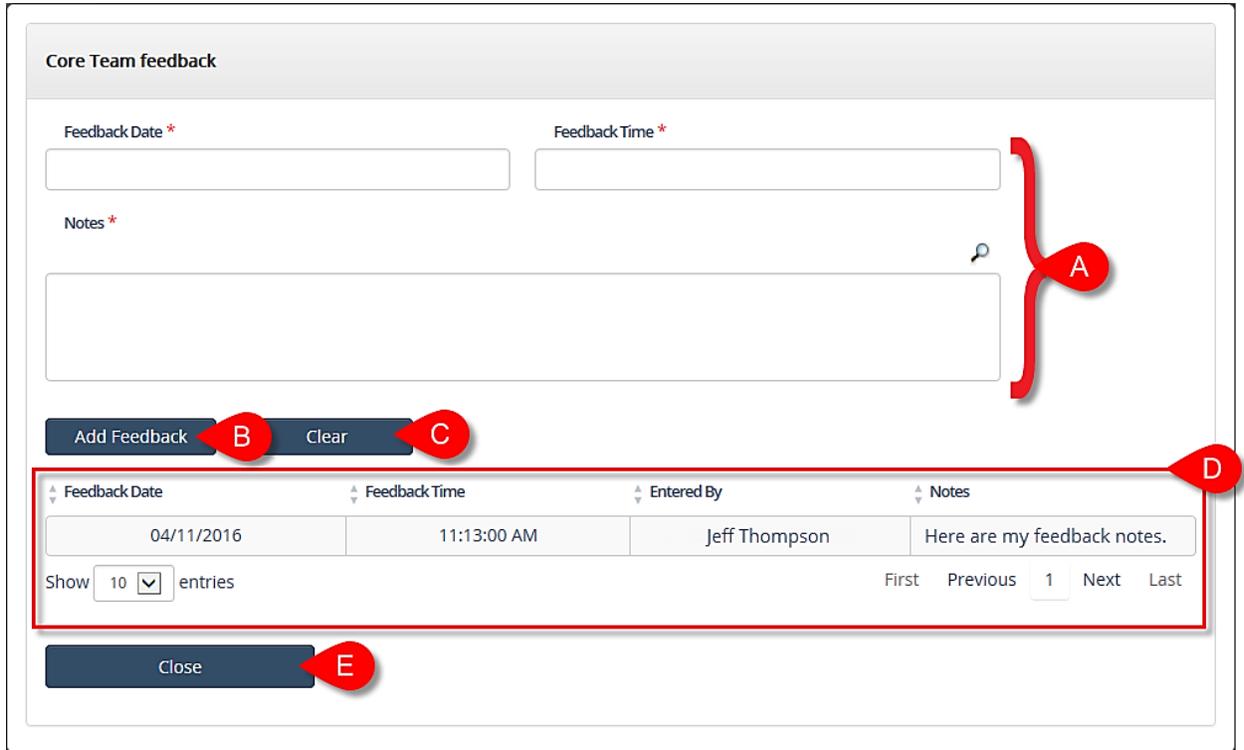
- i. Clicking on the *Meeting Date* hyperlink for a Referral will navigate the user directly to the *Meeting* in the Referral.
  - ii. The *Reminders* list defaults to *All* but can be filtered to show only *Action Items* or *Follow-Up Items* using the radio buttons above the *Reminders* grid.

### Dashboard View by Role

Each role in ITM will have a different Dashboard View:

Panes:	Admin (ITM Manager)	Core Team Member	Admin Support
Pending Referral	YES	NO	YES
Active Referral	YES	NO	NO
Pending Feedback	YES	YES	NO
Meetings	YES	YES	NO
Reminders	YES	YES	NO

## Documenting and Viewing feedback from the Dashboard



**Core Team feedback**

Feedback Date \*  Feedback Time \*

Notes \*

Add Feedback **B** Clear **C**

Feedback Date	Feedback Time	Entered By	Notes
04/11/2016	11:13:00 AM	Jeff Thompson	Here are my feedback notes.

Show  entries First Previous 1 Next Last

Close **E**

1. Documenting and Viewing feedback from the Dashboard using the Feedback icon [  ]: The Feedback Icon can be found in the *Active Referrals* and *Pending Feedback* panes. Click on the  for the desired Referral to bring up the *Core Team Feedback* pop-up.
  - a. Enter the *Feedback Date*, *Feedback Time* and *Notes*.
  - b. Click **Add Feedback** to save the entered information.
  - c. Click **Clear** to clear the information entered without saving.
  - d. The *Core Team Feedback* grid will display all of the feedback entered for this Referral. To view all of the details of a specific feedback click on the desired feedback in the grid. The information will be displayed above the grid (a).
    - i. To add more feedback after viewing an existing Feedback item click the **Clear** button first.
  - e. Click **Close** to close the *Core Team Feedback* pop-up.

### For more information...

For assistance, please contact the Allegheny County Service Desk at [ServiceDesk@AlleghenyCounty.US](mailto:ServiceDesk@AlleghenyCounty.US) or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access the Self Service Tool go to <http://servicedesk.alleghenycounty.us>