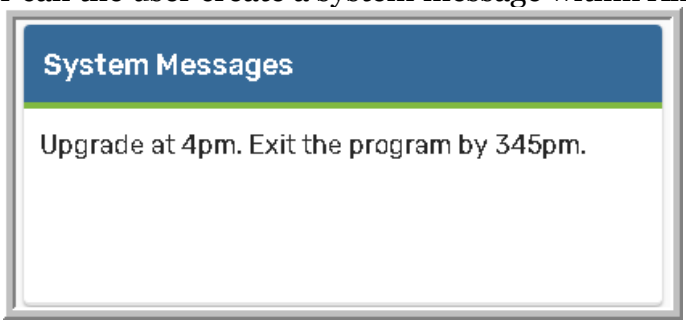
A Guide to Anywhere Widgets

Widget are information displayed on the Anywhere Dashboard that depict data based on a specific time period or to-date. The following is an overview of their function in the system.

System Messages Widget

This widget will display messages which have been created by Administrators to communicate activities, tasks, etc.

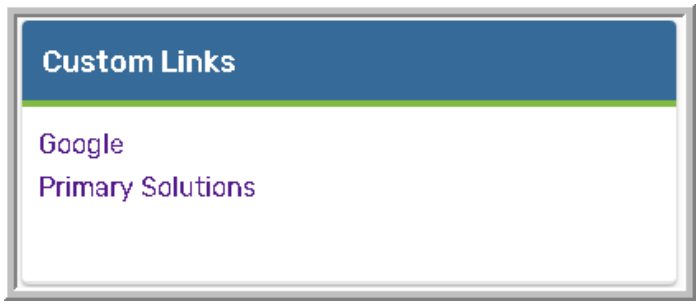
1. The system messages are read only. The users cannot respond to the system messages, nor can the user create a system message within Anywhere.



Custom Links widget

This widget provides hyperlinks to agencies and service providers.

1. Select the Agency or service name and the program will connect the user to the assigned webpage.
2. The Custom Links are determined by the Gatekeeper Administrators and users cannot add or delete custom links from their dashboard.



Case Note Productivity widget

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This widget will display employee productivity. If the documentation timer and travel time are being used, this information will display on the widget. A red bar indicates that productivity totals have not been met, while a green bar shows the user that productivity totals have been met for that day.

To Set up widget:

- Select then Settings to define the case note productivity set up.
    - Show- When the box is checked, the widget will display on the dashboard. If it is not checked, the widget will not be displayed on the dashboard.
    - Days Back- Defines the number of days to display on the dashboard. The maximum number of days to display on the widget is 14 days. (IE. 5 days)
    - Work Hours Per Day- Insert daily work hours. (IE. 7.0 hours)
    - Productivity Threshold- Insert the assigned County Board standards for productivity. (IE. 70%)
    - Once all fields are completed, select save.
- Hover over the bar graph to view the productivity details.
    - Phone Users- Select the bar graph line to view productivity details.

My Case Load Widget

This widget will allow users to see all consumers on their caseload including

- the total number on the caseload
- view demographic information

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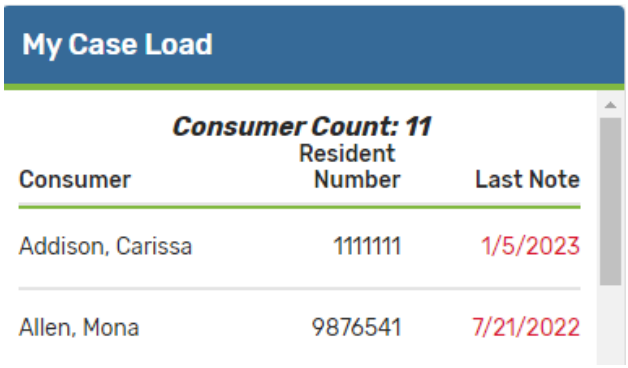
- create a new case note
- the Resident Number
- view the date the last case note created

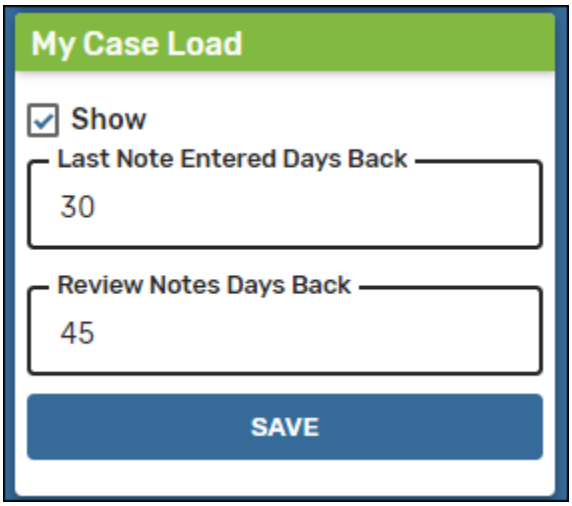
The caseload is generated by the Relationships that have been assigned in the Demographic- People window.

At a glance, the widget displays Consumer first and last name and date for the Last Case Note created. There is setup required for this widget.



To Set up widget:

- Open the ••• then Settings to set My Caseload widget.



  - Show- When the box is checked, the widget will display on the dashboard. If it is not checked, the widget will not be displayed on the dashboard.
  - Last Note Entered Days Back- Defines the Last Note column that displays on the dashboard. If the date of the last note created, exceeds the setup

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criteria for days back, the date will appear in red on the widget. This will alert users that they are not in compliance with dates.

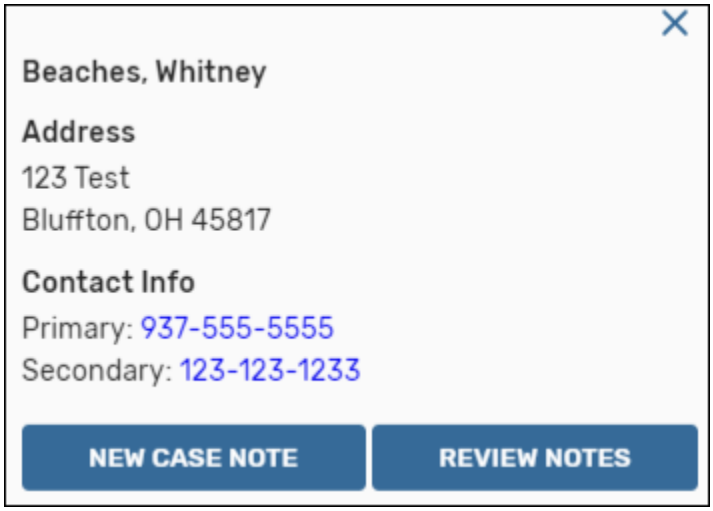
- Note: If the County Board requires quarterly contact. If the last date of contact exceeds 90 days, the date appears in red on the dashboard to notify the user they are not in compliance with quarterly contact requirements.

- Review Notes Days Back- Defines the criteria for retrieving existing case notes, i.e. User sets the criteria for 30 days. When a consumer name is selected, all notes created in the last 30 days will appear in the time review page.

- Once all fields are completed, select save. Close the Widget Settings page.

- Follow the steps below to access the My Caseload widget.

  - Select a consumer name on the My Caseload Widget. A demographic page will display.

  - 

  - The Phone number links are active links. If the user is using a cell phone and selects an active link, the phone will dial the selected phone number.

  - New Case Note button- When selected, a blank case note will display. The consumer name will be at the top of the case note. Insert all required fields and save the case note. If cancel is selected, users will return to the time review page.

  - Review Notes button- When selected, the case note review page will display all case note created within the assigned time frame within the Widget Settings- Review Notes Days back setting. (See above).

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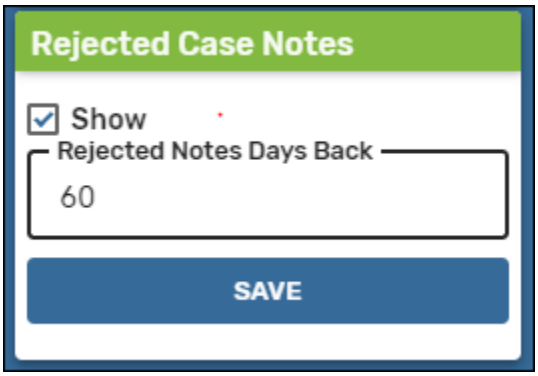
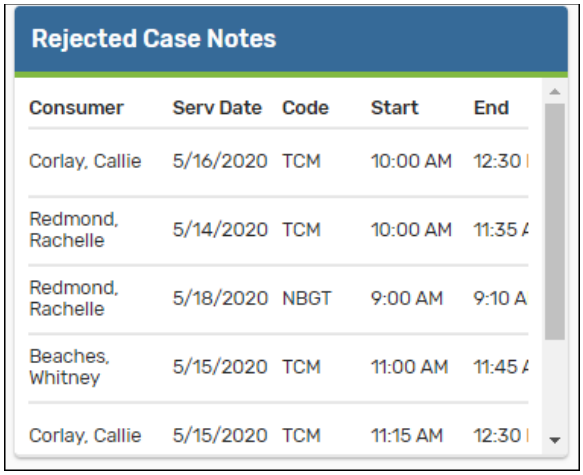
Rejected Case Notes widget

This widget will alert users when they have rejected case notes that require correction. There is setup required for this widget. Follow the setup instructions below.

To Set up widget:

- Open the ••• then Settings to set Rejected Case Notes.
  - 

    - Show- When the box is checked, the widget will display on the dashboard. If it is not checked, the widget will not be displayed on the dashboard.
    - Rejected Notes Days Back- Defines the criteria to retrieve existing case notes that have been rejected within an assigned time period and require correction.
    - Once all fields are completed, select save. Close the Widget Settings page.
- The Rejected Case Notes widget displays the consumer name, service date, service code, and start/end times.



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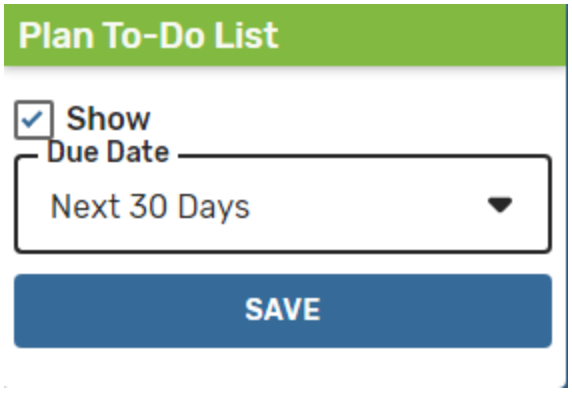
- To review a rejected case note, select a consumer line item entry on the widget. The case note will display. If your agency is using the documentation timer, a prompt box will appear and users will select yes or no to begin the timer.
    - Revisions to the case note can be made at this time. Users can select Update to save the revised case note.
        - Once corrected, users should check the 'Corrected' check box to remove from the widget.
    - User can also delete a case note. If delete is selected, the case note will be permanently deleted.
    - If cancel is selected, the user will return to the time review page.

Plan To-Do List widget

This widget displays all tasks that are due for a specific filtered due date. Follow the setup instructions below.

To Set up widget:

- Open the ••• then Settings to set Plan To-Do List



- Show- When the box is checked, the widget will display on the dashboard. If it is not checked, the widget will not be displayed on the dashboard.
- Due Date - Defines the time span where any tasks that are due will display in the list.
- Once all fields are completed, select save. Close the Widget Settings page.

To utilize this widget, users can review what is displayed based on the Due Date listed on the Workflow in the Plan Module.

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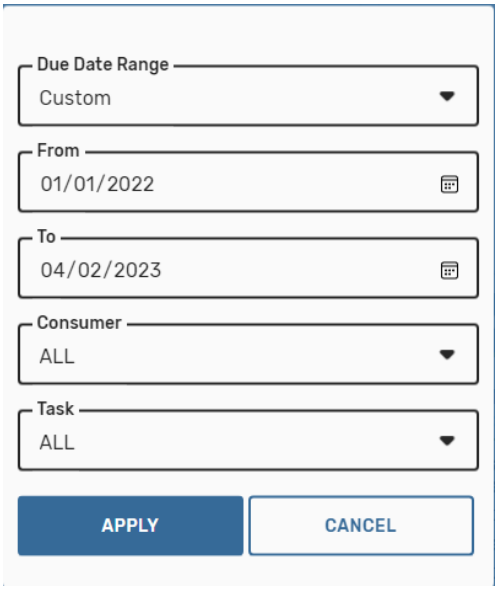
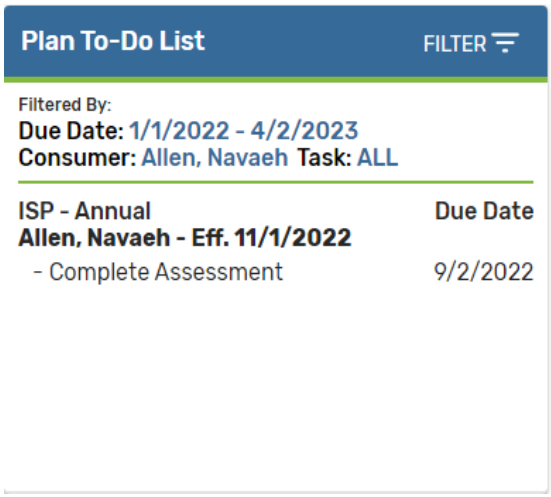
- Users may change the settings temporarily by clicking on the Filter button.
  - Enter the Due Date range or choose Custom.
    - If custom is chosen, users will be required to enter a From/To date range.
  - Enter a specific consumer or click all.
  - Enter a specific Task or click all.



The widget will display a list of those tasks due based on the filter criteria.

- Users can go directly to the task by clicking on the line item in the widget.

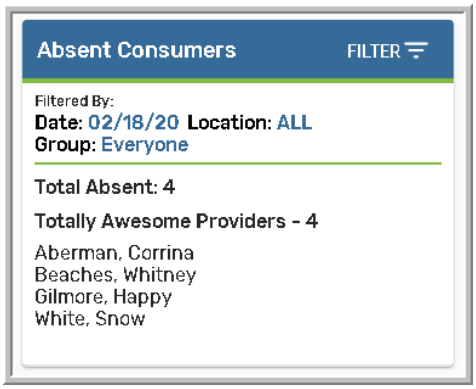


Widgets specifically for those utilizing Day Services

Absent Consumers widget

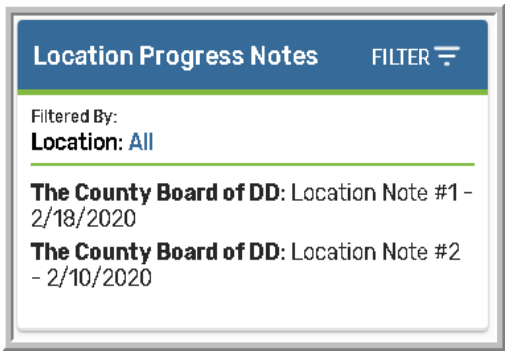
This widget is linked to the Day Services module and will display any consumers that have been deemed as absent for the day.

- The widget has a filter which will allow users to view absences by date, location, and groups.
- The user will only see locations in which they have been given security permission to view.



Location Progress Notes widget

This widget will alert users when a location progress note has been created.



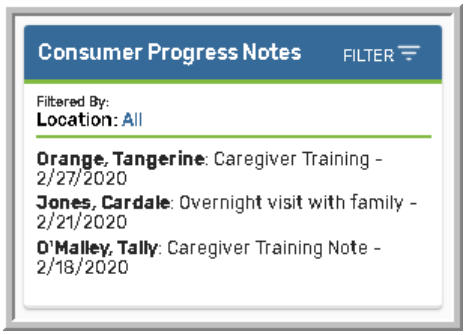
This widget will display the name of the location, the title of the progress note, and date it was created. This widget has a filter which will allow users to filter for all location notes or for a specific location.

- To view the progress note, users will need to open the Roster module.
    - Once this page opens, select the green highlighted Location Notes tab to view the progress note.
    - The unread progress note will be displayed in red. Select the red highlighted box to open the progress note.

- Users may respond to the note by selecting the New Note button and then provide a response in the displayed message box. Once the note is complete, select send.
- Select the Back to notes arrow to exit the progress note screen. At this time, users will see a history of all progress notes.
- If the New Note button is selected, users can insert a new note with a title and message. Once the note is completed, the user will select send.

Consumer Progress Notes widget

This widget will alert users when a progress note has been created for consumers in the Roster.



- This widget will display the name of the location, the title of the progress note, and date it was created. This widget has a filter which will allow users to filter for all locations or for a specific location.
  - To view the consumer progress note, open the Roster module.
  - Once this page opens, consumers that have an unread progress note will be identified by a red bell on the consumer card.
  - Select the consumer card, the progress notes option will be highlighted in red.
  - Select the red highlighted progress notes option to view the progress note.
  - Respond to the note by selecting the New button and then provide a response in the displayed message box. Once the note is complete, select send.
  - Select the Back arrow to exit the progress note screen.
  - If the New button is selected, users can insert a new note with a title and message. Once the note is completed, the user will select send.

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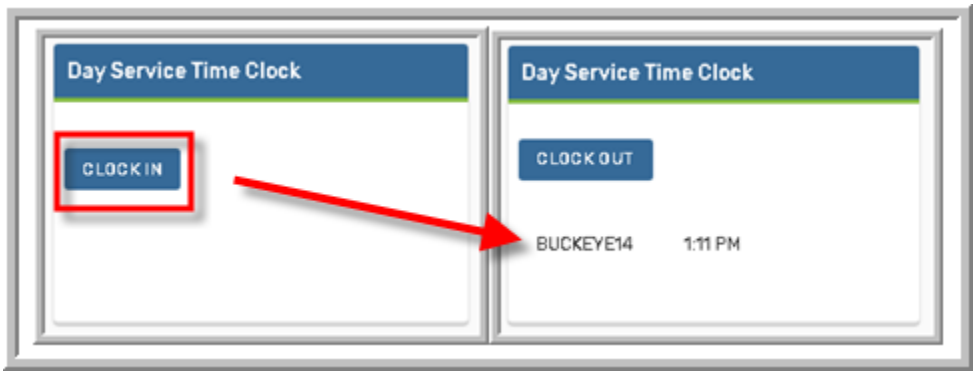
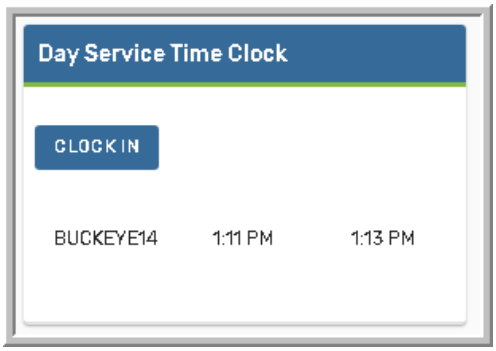
Day Services Time Clock widget

This widget will allow users who are assigned as Day Services staff, to capture their clock in time for providing services.

- When Clock In is selected, the widget will display the location and time the employee clocked in to provide services.



  - Once the Clock Out button is selected, the clock out time will display next to the clock in time. The Clock Out button will disappear and the Clock In button will be displayed again.



  - If the clock in button is selected and there is an overlap, the program will display a message in red to notify of an overlap and prevent the clock in.

Daily Services widget

This widget will allow users to view daily remaining services that have been identified in the Outcomes module. The widget will display services based upon date, outcome type, location, and groups.

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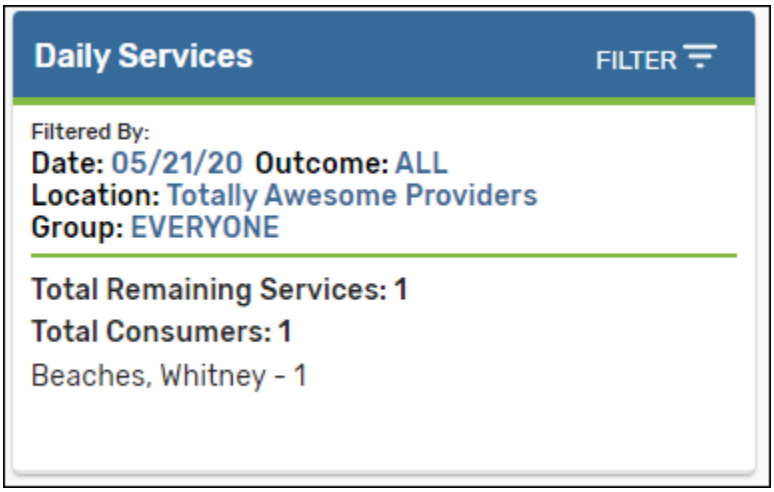
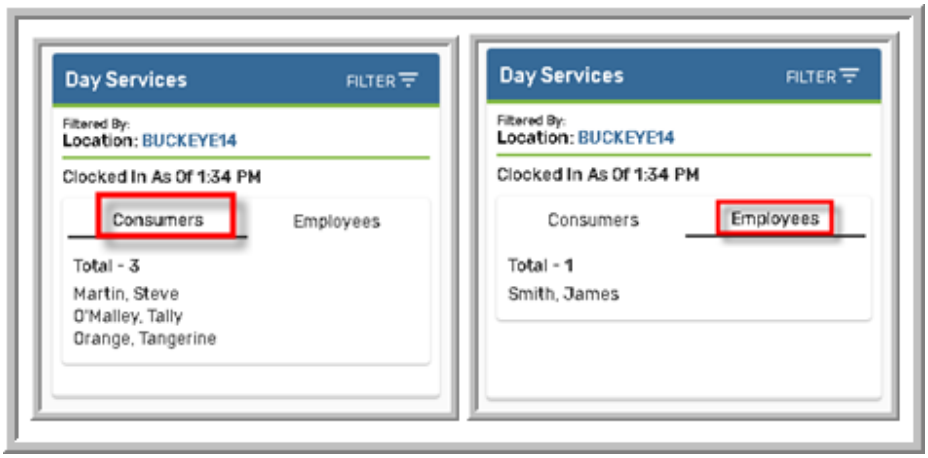


- The widget will display the consumer name and the number of daily services that require documentation for that individual. This widget will also display a total for all remaining services that require documentation for the filtered location.
- This widget has a filter that will allow users to search for services based upon desired criteria for all or desired criteria for a specific date, outcome type, location, and groups. The filters can be used independently or in combination of one another.
- Once a daily service is documented at least once, the consumer will no longer appear in the widget.

Day Services widget

This widget will allow users to view a location name and the names of all consumers and employees that are clocked in for the present time.



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- The widget also provides totals for both consumers and employees. This widget has a filter that will allow users to select a specific location.

This document was written with the assumption that the security for this module/function is already in place. For additional information, please see the related set-up guide or contact your systems administrator.