The Advisor Dashboard

When users sign into the Advisor program, the program displays a main dashboard. The dashboard displays modules, a navigation toolbar, and widgets.

The Dashboard is comprised of widgets.

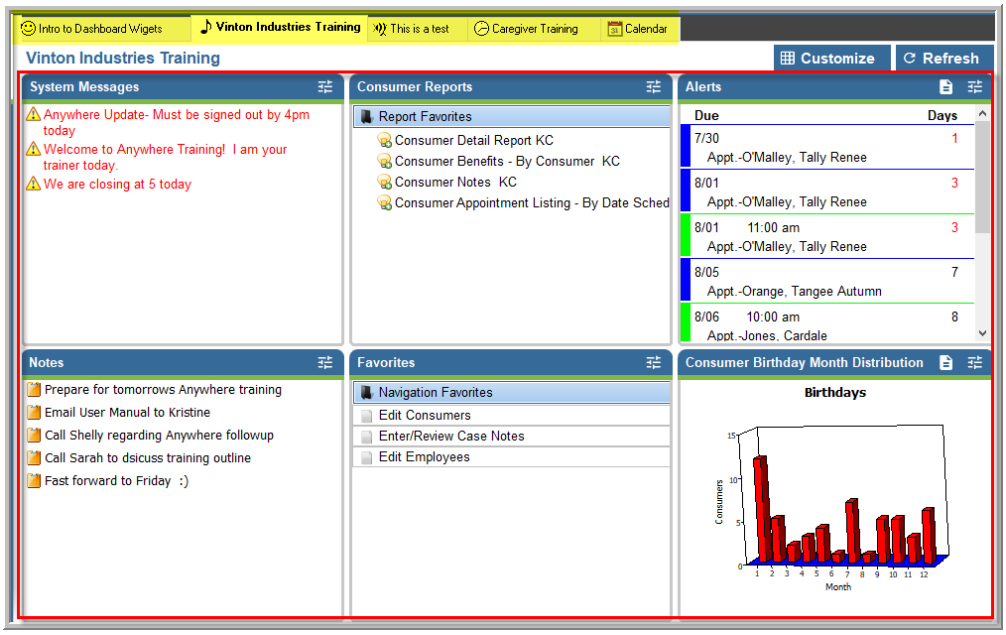
- The widgets are smaller boxes on the dashboard.
- The widgets are outlined in red in the screen shot below.

The Dashboard must contain a minimum of 2 widgets and a maximum of 6 widgets per dashboard.

- Users may title Widgets as desired.
- Users may add icons and customize each dashboard by a visual cue.
- Users may create multiple dashboards.

Duplicate widgets can be created on dashboards.

- The Dashboard tabs are highlighted in yellow below.

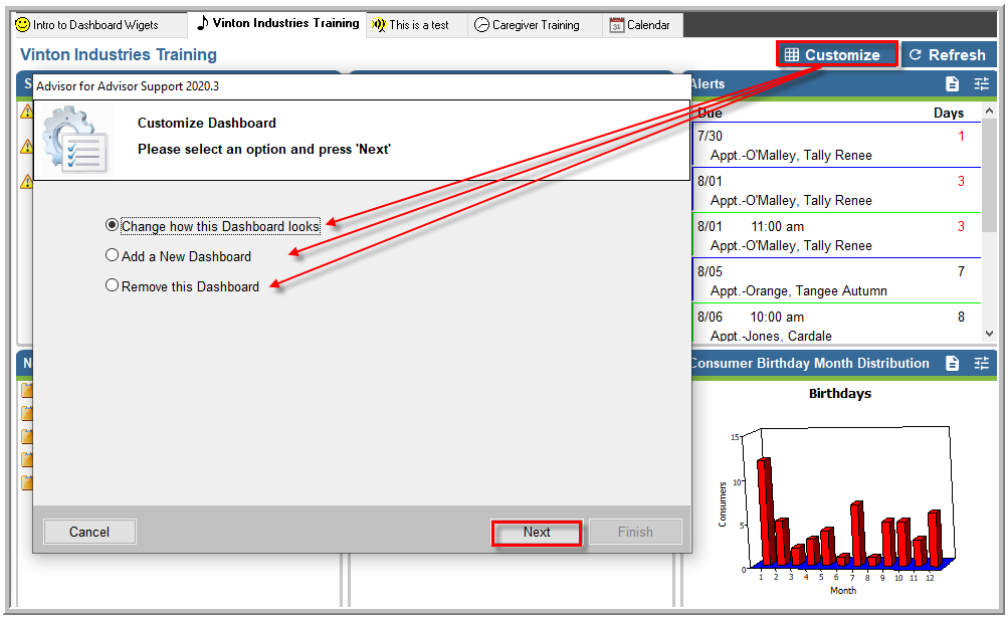


Creating a Dashboard/Updating an existing Dashboard

The user may customize the dashboard to track caseload counts, insert case notes, monitor productivity, and much more. To do this:

- Select the "Customize" button in the upper right hand corner of the dashboard.

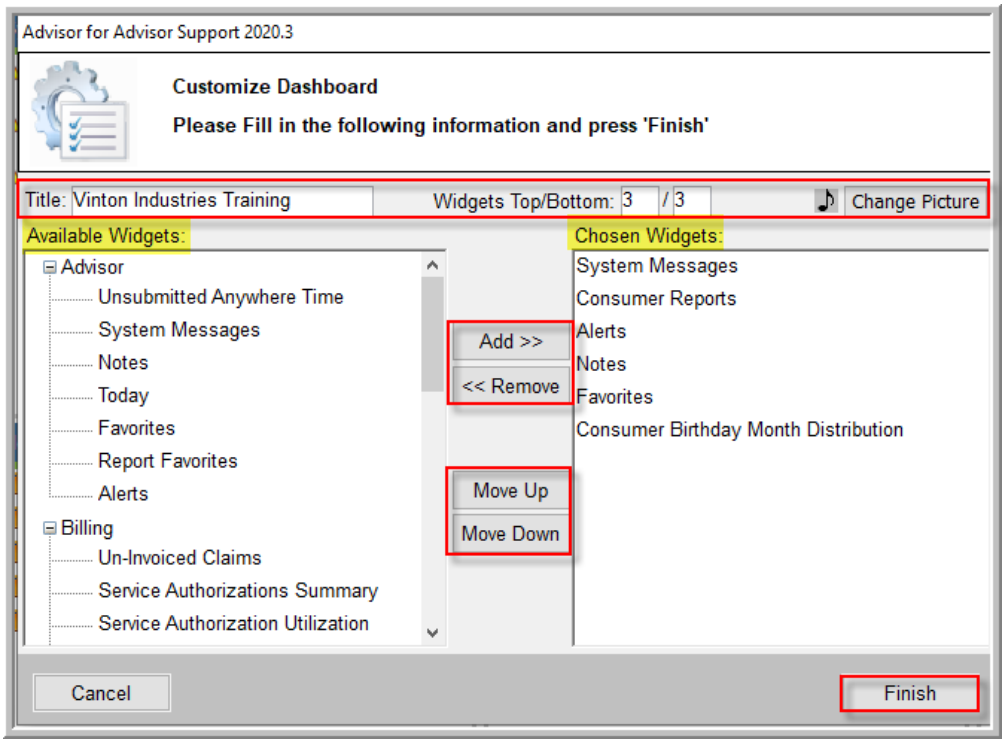
- Select from one of the two options: Change how the dashboard looks or Add a New Dashboard.



- Insert a Title for the Dashboard.

- Below the title, there is a list of available widgets.

- Select the desired widgets.
  - Highlight the item select the "Add" button in the middle of the box.
  - This will then move the chosen widget to the right hand side.
  - If there is a mistake, simply highlight the wrong entry (on the right hand side) and select the "Remove" button.
  - Once the chosen widgets are selected, use the "Move Up" and "Move Down" buttons to reorder the selections, as desired.
  - To do this, highlight the desired item and click the Move Up or Move Down button, located in the middle of the page.
  - Users may assign the desired number of widgets top/bottom.
  - Once the widgets have been chosen, select Finish.



- The widgets will display on the dashboard in the order they are listed on the Chosen Widgets column.
    - Users may move the position by clicking Move Up/Move Down.

- All widgets will have an icon in the upper right hand corner resembling arrows.
    - When this icon is selected, it will open setup options that are available for the widget.

- Some widgets may display two icons.
    - The paper icon with a lightning bolt is a quick print option.

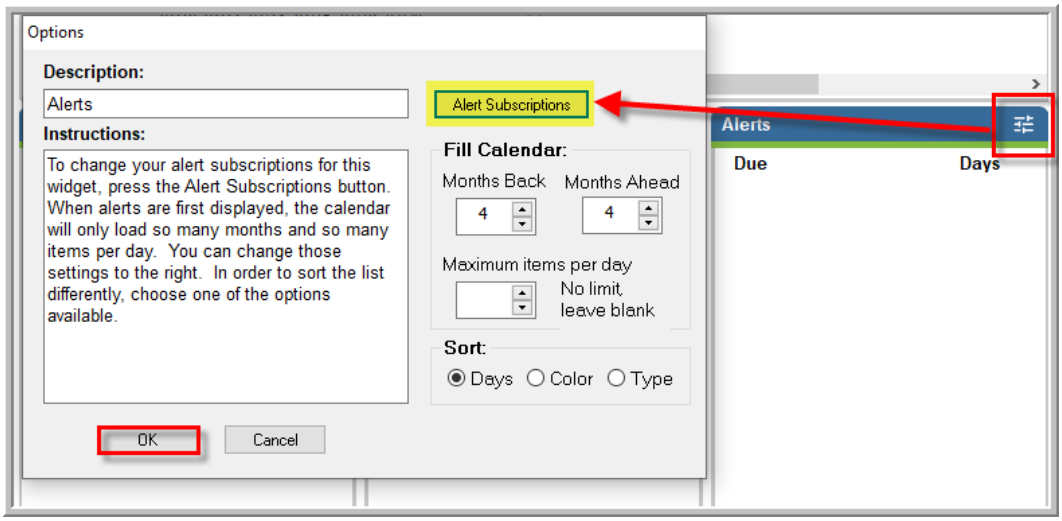
- Users may have duplicate widgets on the dashboard (s).

Advisor Alerts

Advisor – Creating Dashboard and Dashboard Alerts

The Alerts allow users to track a variety of information, such as changes to demographic information, monitor due dates for activities, track age groups, etc.
To subscribe to an Alert, Select the arrow icon on the Alert widget. Follow these steps:

- Select the arrows icon on the Alerts widget. The Options window will display.

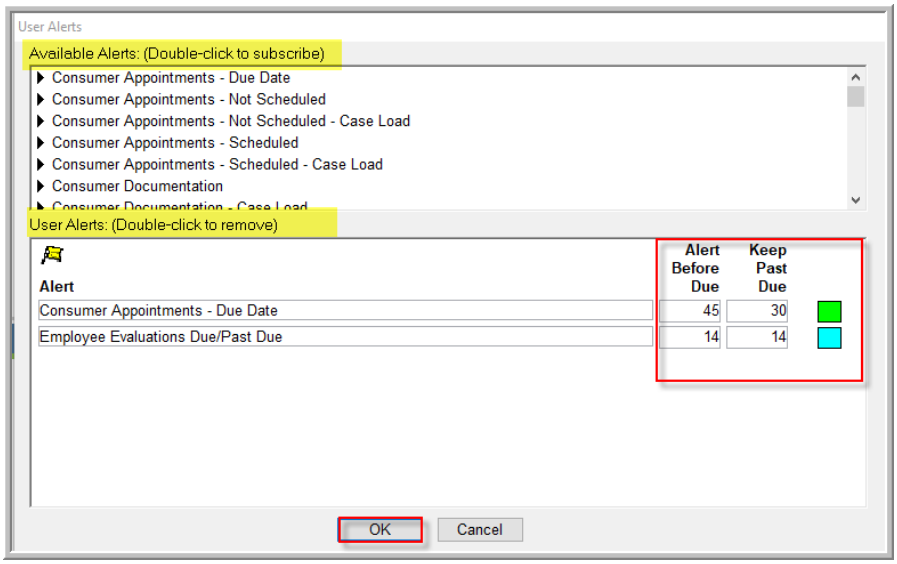


- Insert a Description name if desired.
- Fill calendar options are used to generate alerts on the Gatekeeper calendar.
- Select Alert Subscriptions.

- The available alerts will display in the wizard.
  - The available alerts displayed is based upon security permissions.
  - Duplicate alerts subscriptions can appear on a dashboard(s).

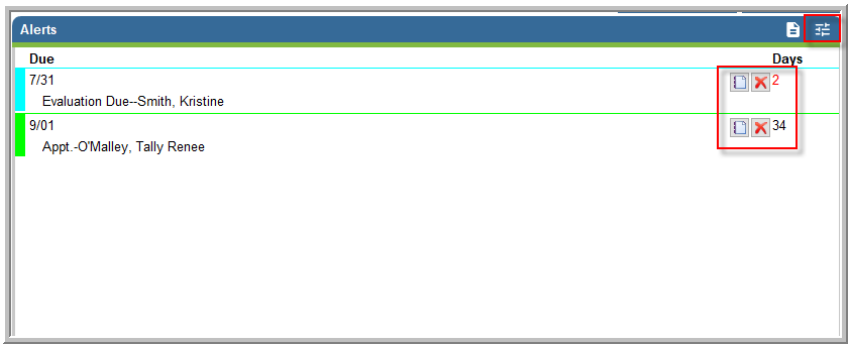
- There are various types of Alerts:
  - Module Alerts- display information for all consumers within Gatekeeper.
  - Caseload Alerts- display information for all consumers in which a relationship is assigned in the Demographic- People window.
  - Supervisor Alerts- displays results for all staff members in which a relationship is assigned in the Demographic- People window.
  - Inactive Alerts- displays information for all consumers that have a status of “Inactive” on the General tab in the Demographic- People window.
- To Select an Alert
  - Double click the Alert Name.
  - The alert name will display at the bottom of the page under User Alerts title.
  - To remove an alert, double click the alert name in the User alerts field. The program will display a message to ask the user to verify deleting the alert.

- Users may assign the criteria for the number of days to "Alert Before Due" and "Keep Past Due". The alert will remain on the dashboard based upon this criteria.
  - The alert will automatically disappear from the dashboard when the criteria is met.
- Users may color code alerts.
  - Select the black square to assign a color code to the Alert.



- Once all criteria is applied, Select OK. Then select OK again to exit the insert wizard.
- The dashboard will refresh and display all alerts that meet the inserted criteria.
- When an Alert appears on the Dashboard the Alert will display:
  - Due- This is alert due date.
  - Paper Icon- This will allow users to add notes to the alert. This is a limited text field of 250 characters. Once the detail is captured, select OK. The paper icon on the alert will display with lines to indicate a note exists on the alert.
    - To retrieve the note, select the paper icon and the note will display. To remove a note from an alert, clear the note field and select OK. The icon will display as a piece of paper without lines.
  - The Red X Icon- This will allow users to hide the items from the dashboard.

- Days- This is the number of days until the alert is due or the number of days after the due date depending on the alert set up. The Past Due is shown as red.

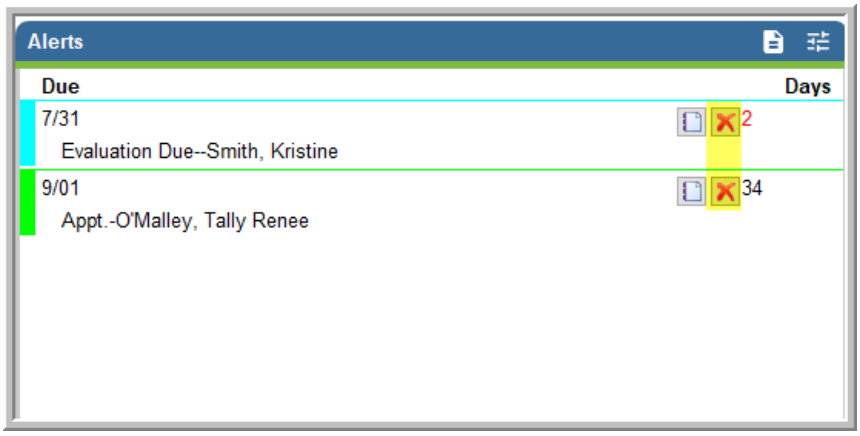


Do not subscribe to more than five alerts on one widget on the home dashboard. This can slow the opening process of the program. It is recommended the user subscribe to multiple alert widgets and disperse the data that is being retrieved.

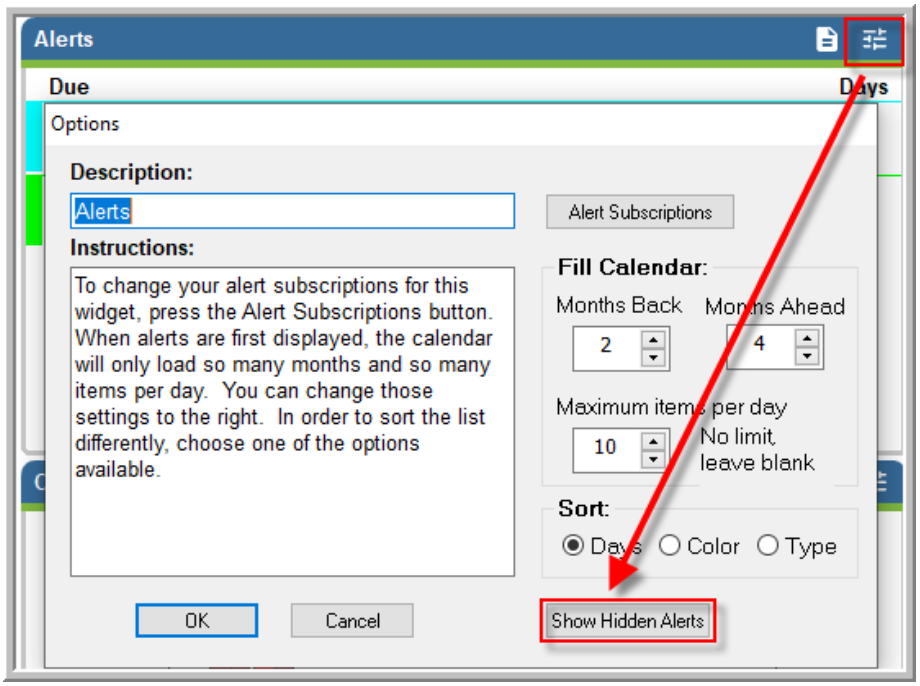
Hiding Alerts on the Dashboard

Users may hide alerts on the dashboard if desired. To do this:

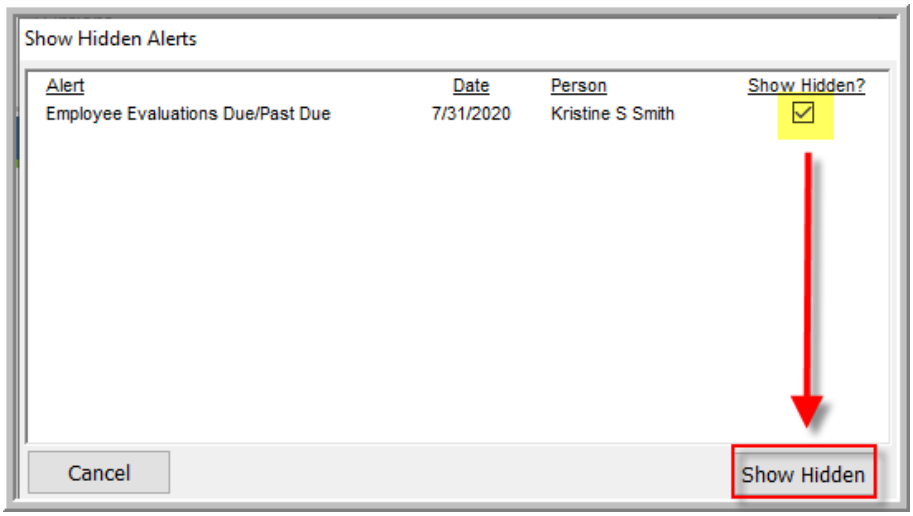
- Select the Red X icon on the alert item.
  - The alert will disappear from the dashboard. **However, this action does not delete the alert.** It is hidden and can be retrieved at any time.



- To retrieve the alert item:
  - Select the options button on the widget.
  - The Alerts wizard will display.
  - Select Show Hidden Alerts.



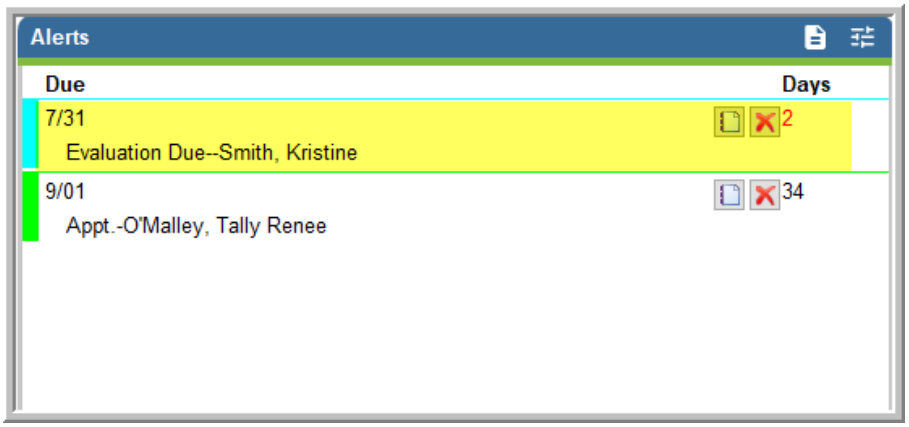
  - All Hidden Alerts will display in the wizard. The wizard will display the alert name, date, person, and a Show Hidden check box.
  - Place a check mark in the box. Then select the Show Hidden button in the corner.



  - Select OK to close the options window.

- The dashboard will refresh and the alert will display in the widget.

- The alert will remain on the Dashboard until the user "Hides" it or the alert meets the past due date criteria and is automatically removed from the dashboard.



Available Alerts within Advisor

Users may access alerts in which security permissions have been assigned.
The following are available alerts in Advisor:

- Consumer Appointments
  - There are various alerts available based upon the dates captured on the Edit Consumer- Appointment tab. This allows users to track consumer appointments and users can be alerted of Due Dates, Scheduled Dates, and appointments that have not been scheduled.
- Consumer Documentation
  - This alert notifies users of Documentation that is due to expire. This alert is generated from the Expiration Date on the Edit Consumer- Documentation tab.
- Employee Benefits
  - This alert allows administrators to monitor when an Employee is eligible for benefits. This alert is generated from the Eligible date assigned on the Edit Employee- Benefits tab.
- Employee Data- With Expiration
  - This alert allows administrators to track Employee data, trainings, certifications, etc.. This alert notifies users when data categories will expire. This data is generated from the entries on the Edit

Employee – Employee Data tab. (IE. Data categories may include Agency trainings, CPR, Background checks, etc.)

- Employee Data- With No Date Completed
  - This alert notifies users when the data/data subcategories do not have a date captured on the Edit Employee – Employee Data tab. (IE. Data categories may include Agency trainings, CPR, Background checks, etc.)
- Employee Evaluations
  - This alert allows administrators to track Employee evaluations. This alert notifies users when Employee Evaluations are Due or Past Due based upon the dates that are captured in the Edit Employee- Evaluations tab.
- Employment Contact Follow Up
  - This alert notifies users when a follow up is due based upon the Follow Up Date that is captured on the Employment- Contacts tab.
- EVV Consumer
  - There are various alerts available to notify users when specific EVV data is missing from the Edit Consumer- General 1 or General 2 tab.
- Expiring Authorizations
  - This alert notifies users when an authorization is going to expire based upon the assigned "To" Date on the Consumer- Service Authorization window.
- Incident Tracking- Follow Up
  - This alert allows users to track follow ups that are assigned on an incident report. This alert notifies users when a Due Date has been assigned on the Edit Incident Tracking- Consumer- Follow Up tab.
- Outcome Review Due
  - This alert allows users to track review dates for outcomes and services. This alert notifies users when a Review Date has been assigned on the Outcomes and Services- Review tab.
- Vehicle Maintenance- Due Date
  - This alert allows users to track vehicle maintenance. This alert notifies users when a Due Date has been captured in the Transportation- Vehicle Maintenance window.