



Dashboard Navigation And Reports Guide

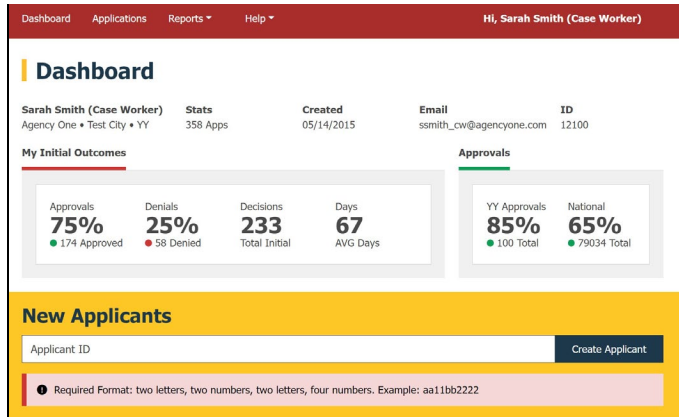
Table of Contents

Dashboard	1
All Users	1
Menu Bar.....	1
User Details	1
My Initial Outcomes.....	1
Approvals	1
New Applicants	1
Snapshots and Summaries	1
Case Worker Dashboard	2
Applications Grid.....	2
Agency Lead Dashboard.....	4
Snapshots and Summaries	4
Applications/Case Workers Grid	4
Local Lead Dashboard	6
Snapshots and Summaries	6
Applications Grid.....	6
State Team Lead Dashboard	8
Snapshots & Summaries	8
Applications Grid.....	8
Applications Page	10
Search.....	10
View/Edit Applications	10
Filters.....	10
Reports.....	11
Using Reports	11
Individual Reports	11
Summary Reports.....	12
Overview Summary Report	12
Optional Information Summary Report	12
Non-SOAR Summary Report	13
Individual and Summary Report Filters.....	13
Report Filters Available to All Users.....	13
Report Filters Available Only to SOAR Leads	13
User Summary Report.....	14
SOAR Users Grid.....	14

Dashboard

When you log-in to OAT, you will land on your dashboard. *The information displayed is dependent on your role.*

All Users



Menu Bar

- Navigate between the Dashboard, Applications page, and Reports page.
- View/Edit your profile by clicking on your name on the top right. You can only edit your name, phone, email address, and password.

User Details

- Name (Role), Agency, City, State
- Stats: Total number of applications entered in OAT regardless of type or decision status
- Created: Date OAT account was created
- Email and User ID

My Initial Outcomes

- Outcomes of **your initial applications** that have a decision entered into OAT.

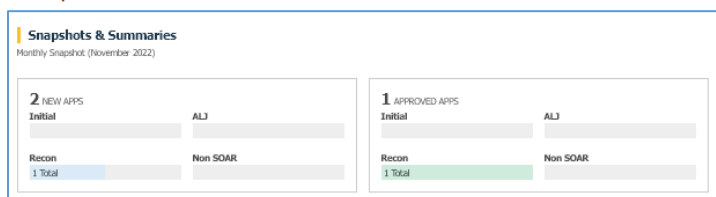
Approvals

- State/National Approval Rate: based on outcomes reported in the previous fiscal year, including those not entered into OAT.

New Applicants

- This gold-colored box is where you can create a new Applicant ID. (Please see the OAT User's Guide)

Snapshots and Summaries



Monthly Snapshot

- Displays **your** OAT activity for the current month: New Applications created and Approvals for each application type.

~~ The Remainder of the Dashboard differs based on OAT Role ~~

Case Worker Dashboard

Applications Grid

Pending Applications

Pending Applications All Applications

Application Type: Show All Export CSV

Initial SOAR Application
Reconsideration using SOAR
ALJ Hearing using SOAR
Non-SOAR Claim

Search Applications

ApID	PFD Date	App Date	Type	Status	Actions
ti22bb2020	-	-	ALJ Hearing using SOAR	Pending	Continue
ca56fi1964	-	-	Initial SOAR Application	Pending	Continue
df34df4512	-	-	ALJ Hearing using SOAR	Pending	Continue
em99so1234	12/01/16	-	ALJ Hearing using SOAR	Pending	Continue
mi75ki6052	10/10/17	-	ALJ Hearing using SOAR	Pending	Continue
dd58dd8896	04/01/18	-	ALJ Hearing using SOAR	Pending	Continue
Me93la6899	05/31/18	-	Reconsideration using SOAR	Pending	Continue
we98re3456	06/05/18	07/19/18	Initial SOAR Application	Pending	Continue
ja85do7877	07/30/18	07/30/18	Initial SOAR Application	Pending	Continue
ma87sm9999	11/30/18	01/29/19	Initial SOAR Application	Pending	Continue

Showing 1 to 10 of 38 entries (filtered from 51,553 total entries)

1 2 3 4 Next >

Application Type

- You can filter by Application Type (Initial, Reconsideration, ALJ Hearing, or Non-SOAR).

Columns

- ApID; PFD (Protective Filing Date); Application Submission Date, Type, and Status; and Actions
- You can sort by any column by clicking on the heading.

View/Edit Application

- Click on the ApID or "Continue" in the Actions column to enter additional information about the case.

All Applications

Pending Applications **All Applications**

Application Type
 Show All
 Show All
 Initial SOAR Application
 Reconsideration using SOAR
 ALJ Hearing using SOAR
 Non-SOAR Claim

Search Applications

ApID	Current App	Status	Days	# Apps	Actions
aa11aa1110	Initial SOAR Application	Denied	0	2	Actions
aa11bb2020	Initial SOAR Application	Archived	-	0	Continue
aa11bb2224	Initial SOAR Application	Approved	62	1	Actions
aa11ss1234	Reconsideration using SOAR	Denied	405	1	Actions
aa12bb1234	Initial SOAR Application	Approved	0	1	Actions
aa34bb3456	Initial SOAR Application	Approved	11	1	Actions
aa34tt5678	Initial SOAR Application	Approved	8	1	Actions
aa55bb6666	Initial SOAR Application	Approved	109	1	Actions
aa57rd1967	ALJ Hearing using SOAR	Approved	25	2	Actions
aa82ba1234	Reconsideration using SOAR	Approved	0	1	Actions

Showing 1 to 10 of 301 entries (filtered from 51,554 total entries)

1 2 3 4 5 31 Next >

Application Type

- You can filter by Application Type (Initial, Reconsideration, ALJ Hearing, or Non-SOAR).

Columns

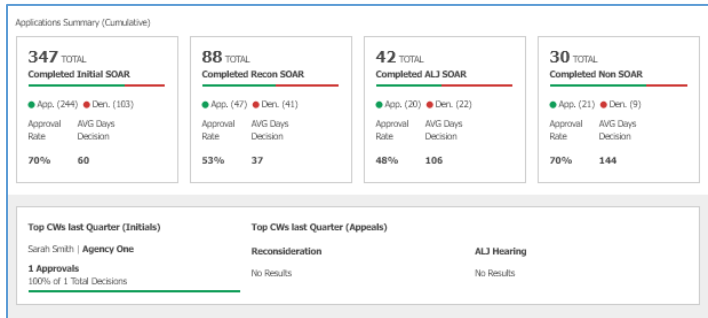
- ApID, Current Application Type and Status; Days to Decision, # Apps (application types this ApID has progressed through), Actions
- Click on column heading to sort by: ApID or Current App.

View/Edit Application

- New or Pending cases:
 - Click on the ApID or "Continue" in Actions Column to enter additional information about the case.
- Approved or Denied cases:
 - Click on the ApID or "Actions: Overview" in Actions Column to see the Application Overview.
 - Click on "Actions: Edit Application" in Actions Column to enter Post-Decision information (*if it has not yet been entered*).

Agency Lead Dashboard

Snapshots and Summaries



Applications Summary (Cumulative)

- Approval Rates and Average Days to Decision for all of your Agency’s completed applications.

Top CWs last Quarter

- Top Case Workers within your agency based on approval rates for Initial applications and Appeals.

Applications/Case Workers Grid

Pending Applications

ApID	PFD Date	App Date	Case Worker	Type	Status	Actions
vb71ss4513	-	-	Smith, Sarah	Initial SOAR Application	Pending	Continue
tz22bb2020	-	-	Smith, Sarah	ALJ Hearing using SOAR	Pending	Continue
ca56f1964	-	-	Smith, Sarah	Initial SOAR Application	Pending	Continue
df34df4512	-	-	Smith, Sarah	ALJ Hearing using SOAR	Pending	Continue
em99so1234	12/01/16	-	Smith, Sarah	ALJ Hearing using SOAR	Pending	Continue

Users

- You can filter by Case Worker.

Columns

- ApID, PFD, Application Submission Date, Case Worker, Application Type and Status, Actions
- You can sort by any column by clicking on the heading.

View/Edit Applications

- Click on the ApID or “Continue” in the Actions column to enter additional information about the case.

[Your Agency] Case Workers

Pending Applications **Agency One Case Workers**

Users

Show All

Show 10 Search Users

Case Worker	Approvals/Denials	Decisions	Days	Actions
Kilpatrick, Mike	/	0	0	Actions
Kilpatrick, Mike	/	0	0	Actions
NextStepTesting, Nate	2 / 6	8	1	Actions
Smith, Sarah	15 / 4	19	9	Actions
Smith, Sarah	221 / 84	305	76	Actions

Showing 1 to 5 of 5 entries (filtered from 7,138 total entries)

1

Users

- You can filter by Case Worker.

Columns

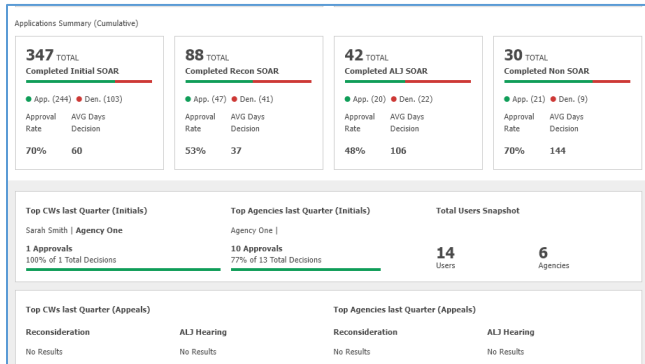
- Case Worker, Approvals/Denials Progress Bar, Total Decisions, Average Days to Decision, Actions
- Click on column heading to sort by Case Worker.

View Applications

- Clicking “Actions: View Cases” in the Actions column will take you to that Case Worker’s “Applications” page.

Local Lead Dashboard

Snapshots and Summaries



Applications Summary (Cumulative)

- Approval Rates and Average Days to Decision for all completed applications in the Local Lead’s assigned cities/counties

Top CWs and Agencies last Quarter

- Top Case Workers and Agencies from your assigned cities/counties based on approval rates for Initial applications and Appeals

Total Users Snapshot

- Total number of users and agencies in your assigned cities/counties

Applications Grid

Pending Applications

ApID	PFD Date	App Date	User	Role	Type	Status	Actions
az12za1234	11/07/22	11/08/22	Smith, Sarah	Case Worker	Initial SOAR Application	Pending	Continue
bi18al2018	12/20/17	-	Smith, Sarah	Local Lead	Reconsideration using SOAR	Pending	Continue
ca52el6598	04/16/21	04/16/21	Smith, Sarah	Case Worker	Initial SOAR Application	Pending	Continue

Users

- You can filter by Case Worker.

Columns

- ApID, PFD, Application Submission Date, User, Role, Application Type, Application Status, Actions
- You can sort by any column by clicking on the heading.

View/Edit Applications

- Click on the ApID link or “Continue” in the Actions column to enter additional information about a case.

All Applications

Pending Applications **All Applications**

Users
Show All

Show 10 Search Applications

ApID ↑	Current App ↓	Current Status ↓	Days	# Apps	Actions
aa11aa1110	Initial SOAR Application	Denied	0	2	Actions
aa11bb2020	Initial SOAR Application	Archived	-	0	Continue
aa11bb2224	Initial SOAR Application	Approved	62	1	Actions
aa11ss1234	Reconsideration using SOAR	Denied	405	1	Actions

Users

- You can filter by Case Worker.

Columns

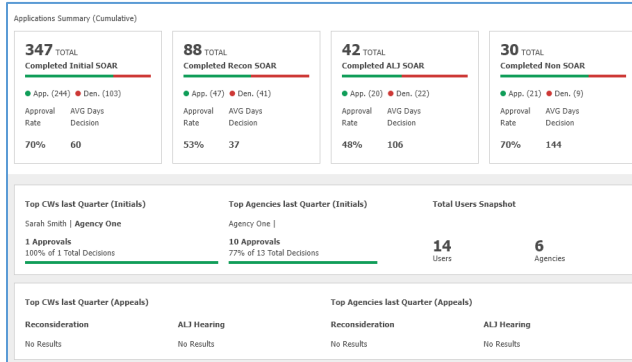
- ApID, Current Application Type, Current Application Status, Average Days to Decision, # Apps (application types this ApID has progressed through), Actions
- Click on column heading to sort by: ApID, Current Application Type, or Current Application Status.

View/Edit Applications

- New or Pending cases:
 - Click on the ApID **or** “Continue” in Actions Column to enter additional information about the case.
- Approved or Denied cases:
 - Click on the ApID link **or** “Actions: Overview” in Actions Column to see the Applicant Overview.
 - Click on “Actions: Edit Application” in Actions Column to enter Post-Decision information about an application (*if it has not yet been entered*).

State Team Lead Dashboard

Snapshots & Summaries



Applications Summary (Cumulative)

- Approval Rates and Average Days to Decision for all completed applications in your State

Top CWs and Agencies last Quarter

- Top Case Workers and Agencies in your State based on approval rates for Initial applications and Appeals

Total Users Snapshot

- Total number of users and agencies in your State

Applications Grid

State Agencies

Agency	Agency Lead	Local Lead	Approvals/Denials	Days	Initial	Decisions	Actions
Agency One	Smith, Sarah	Smith, Sarah	298 / 149	59	329	447	Actions
Agency One for Training	Nagele, Josef		-	0	-	-	Actions

County/Agency

- You can filter by County and/or Agency.

Columns

- Agency, Agency Lead, Local Lead, Approvals/Denials Progress Bar, Average Days to Decision, Initial Applications Entered, Decisions (for all application types), Actions
- You can sort by any column by clicking on the heading.

View Users/Applications

- Click on Agency Name to view all users from that agency.
- Click on Agency Lead or Local Lead name to go to that user's "Applications Page."
- Actions:
 - View Applications: View all applications from that agency
 - View Users: View all users from that Agency.

All Users

Test State Agencies **All Users** Pending Applications

Show 10

Created ↑	Last ↓	Email	St ↓	Role	Agency	Status	Actions
05/14/15	Smith	ssmith_stl@agencyone.com	YY	State Lead	Agency One	Approved	Actions ↓
05/14/15	Smith	ssmith_ll@agencyone.com	YY	Local Lead	Agency One	Approved	Actions ↓
05/14/15	Smith	ssmith_al@agencyone.com	YY	Agency Lead	Agency One	Approved	Actions ↓
05/14/15	Smith	ssmith_cw@agencyone.com	YY	Case Worker	Agency One	Approved	Actions ↓
05/14/15	Jones	ljones_cw@agencytwo.com	YY	Case Worker	Agency Two	Inactive	Actions ↓
05/14/15	Harris	sharris_al@agencytwo.com	YY	Agency Lead	Agency Two	Inactive	Actions ↓

Columns

- Date OAT Account Created, Last Name, Email, State, Role, Agency, Status, Actions.
- You can sort by any column by clicking on the heading.

View Agencies/Users/Applications

- Click on the user’s Email or “Actions: View Cases” from the Actions column to go to the user’s “Applications” page.
- Click on Agency Name to view all Users registered in OAT from that Agency.

Pending Applications

Test State Agencies All Users **Pending Applications**

Application Type
Show All

Show 10

ApID ↓	PFD Date ↑	App Date ↓	Agency	Case Worker	Type	Status	Actions
jo77bo1999	-	-	Agency One	Smith, Sarah	ALJ Hearing using SOAR	Pending	Continue
ma78ca4104	-	-	Agency One	Smith, Sarah	Initial SOAR Application	Pending	Continue
rr33gg9874	-	-	Agency One	Smith, Sarah	Initial SOAR Application	Pending	Continue
zz66ff4532	-	-	Agency One	Smith, Sarah	Initial SOAR Application	Pending	Continue

Application Type

- You can filter by Application Type (Initial, Reconsideration, ALJ Hearing, or Non-SOAR).

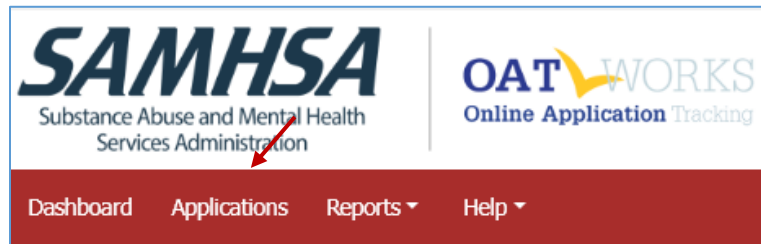
Columns

- ApID, PFD, Application Submission Date, Agency, Case Worker, Application Type, Application Status, Actions
- You can sort by any column by clicking on the heading.

View/Edit Applications

- Click on the ApID or “Continue” in the Actions column to enter additional information about a case.

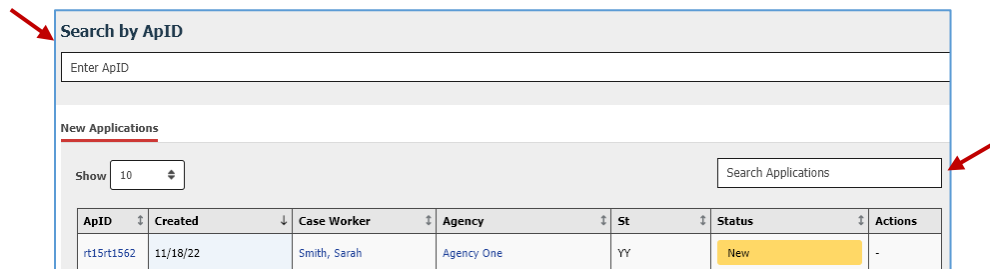
Applications Page



- The Applications page can be accessed from the menu bar
- This page allows all users to view their *own* applications, and also allows SOAR Leads to view all applications entered by Case Workers from their assigned Agency, Cities/Counties, or State.
- Applications are grouped by Application Type (New, Initial SOAR Applications, Reconsideration SOAR Applications, etc.)

Search

- Enter an ApID into the “Search by ApID” box at the top of the page to search across all Application Types
- You can also enter an ApID into the “Search” box at the top of a particular Application Type



View/Edit Applications

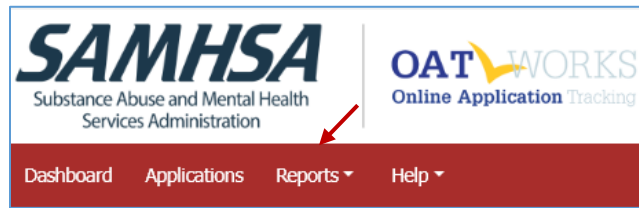
- Approved or Denied cases:
 - Click on the ApID link **or** “Actions: Overview” in Actions Column to see the Application Overview.
 - Click on “Actions: Edit Application” in Actions Column to enter Post-Decision information about an application (*if it has not yet been entered*).
- New or Pending cases:
 - Click on the ApID or “Continue” in the Actions column to enter additional information about the case.

Filters

- All OAT Roles: Filter by Veteran Status, Age, Living Situation, Date ApID Created, and Application Status
- Additional Filters are available to SOAR Leads:
 - Agency Leads: Users
 - Local Leads: Agency and Users
 - State Team Leads: Counties/Parishes, Agency, and Users
- Choose filters and click the blue “Filter” button. To clear all Filters, click “Reset.”



Reports



- The “Reports” feature can be accessed from the Menu Bar.
- A drop-down menu allows users to select “Individual” or “Summary” Reports (All Roles), as well as “User Summary Reports” (SOAR Leads only).
- **Only applications that have received a decision will appear in Reports.**

Using Reports

We recommend that reports be used to celebrate the success of individual case workers, agencies, and localities that are promoting SOAR with great outcomes! Reports can also be used to identify additional training or support needs.

Role	Can Access Data From...	Reports Most Helpful for....
Case Worker	<ul style="list-style-type: none"> ▪ Their own application entries* 	Tracking successes and considering areas where technical support is needed to improve
Agency Lead	<ul style="list-style-type: none"> ▪ Case workers assigned to your agency 	Considering targeted technical assistance or reviewing outcomes at steering committee meetings
Local Lead	<ul style="list-style-type: none"> ▪ Agencies and Case Workers in your assigned cities/counties 	Reviewing outcomes across agencies and counties and considering areas for additional follow-up support
State Lead	<ul style="list-style-type: none"> ▪ All case workers/agencies across the state 	Reviewing state plans, considering targeted technical assistance or support for particular agencies or localities

* All Users/Roles can see their own application entries.

Individual Reports

- Individual reports display all data entered for applications that *have received a decision*.
- Use the gray bar at the bottom to scroll across the screen to view all the data.
- Click on an ApID to see the Application Overview.
- Report can be exported as an Excel file.

Case Worker	Agency	ApID	Gender	Age	Veteran	DischargeStatus	VA Disability Compensation	Applicant Working
Kilpatrick, Mike	Agency One	da54dd5555	F	44	N		N	N
Smith, Sarah	Agency One	gh25gh4568	M	25	N		N	Y
Smith, Sarah	Agency One	te98t1000	F	24	N		N	N
Smith, Sarah	Agency One	aa55bb6666	M	37	Y	Honorable	N	N
Smith, Sarah	Agency One	dc88dc9999	M	38	N		N	N
Kilpatrick, Mike	Agency One	ak23fd2324	M	32	N		N	N
Kilpatrick, Mike	Agency One	CC77CC9876	M	4	-		N	Y
Kilpatrick, Mike	Agency One	aa33af2342	M	33	N		N	N
Kilpatrick, Mike	Agency One	ac33ac3333	M	35	N		N	Y
Kilpatrick, Mike	Agency One	af56aa8894	M	35	Y	Honorable	N	N

Summary Reports

- Choose Report Type and any applicable filters, then click “Filter” to display the report.
- Once a Summary Report has been generated, you have the option to export the information to Excel or display and print as a PDF.

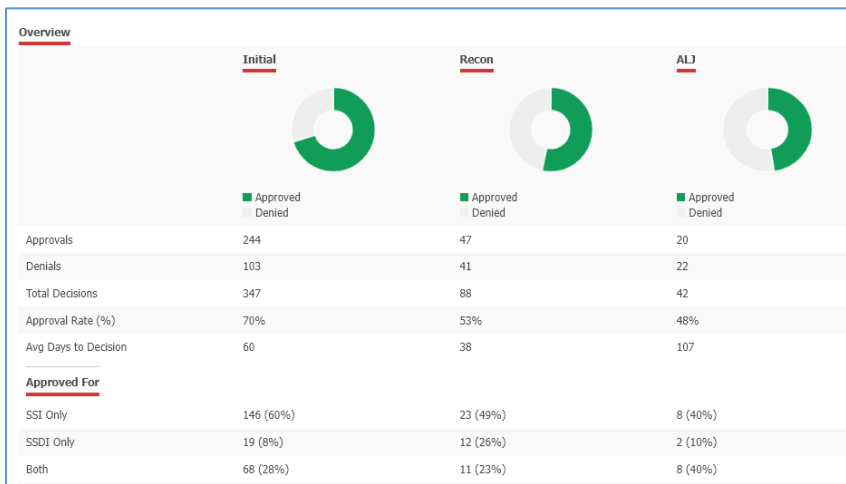
Summary Reports

Report Type

Overview (default)
 Optional Information
 Non-SOAR

Overview Summary Report

This Report provides an easy-to-read Overview of outcomes for SOAR-assisted applications, including applicant demographics, housing status, and SOAR Critical Components.



Optional Information Summary Report

This report provides a summary of Post-Decision information entered for SOAR-assisted Applications (e.g., Medicaid/Medicare reimbursements, back payments, reasons for denial, etc.).

Optional Information	Initial SOAR	Reconsideration	ALJ Hearings
Reimbursements			
Medicare			
Total dollar amount	\$73,595.00 (33)	\$28,429.00 (13)	\$100.00 (1)
Average per applicant	\$2,230.15	\$2,186.85	\$100.00
Medicaid			
Total dollar amount	\$761,143.00 (87)	\$169,028.00 (22)	\$129,423.00 (4)
Average per applicant	\$8,748.77	\$7,683.09	\$32,355.75
General or Public Assistance			
Total dollar amount	\$67,437.00 (71)	\$17,280.00 (20)	\$1,577.00 (3)
Average per applicant	\$949.82	\$864.00	\$525.67
Housing Outcomes			
Housed at time of decision			
Yes	119	24	6
No	68	9	1

Non-SOAR Summary Report

This report provides information similar to the Overview Summary Report, but for non-SOAR-assisted applications. OAT allows SOAR-trained case managers to track assistance provided to individuals that are not experiencing or at-risk of homelessness, or who otherwise are not appropriate for SOAR services. Non-SOAR Cases can also include applications for which the following SOAR Critical Components were *NOT* utilized: becoming the applicant’s Appointed Representative (via the SSA-1696), collecting medical records, and/or writing a Medical Summary Report.

Individual and Summary Report Filters

Choose filters and click the blue “Filter” button. To clear all Filters, click “Reset.”

Report Filters Available to All Users

Veteran

- Whether or not the applicant is a Veteran of the U.S. Military

Age

- Child: SSI applications for children under the age of 18
- Adult: SSI/SSDI applications for adults age 18 and over
- Custom: Customize your age parameters

Living Situation

- You can select one type or hold down the Control key while you click on/select more than one.
- If you are looking to view applicants who were not experiencing or at-risk of homelessness, choose “Non-SOAR” Summary Report type discussed above.

Date of Decision

- Choose from pre-set ranges or create a custom date range.

Report Filters Available Only to SOAR Leads

Users

- Choose a particular Case Worker.

Training Type

- SOAR training that the Case Worker has attended, based on information provided during registration.

Funding Type

- Type of funding that supports the Case Worker’s position, based on information provided during registration.

Counties/Parishes and Agency (Local and State Lead only)

- Choose particular Counties and/or Agencies

User Summary Report

- This report is available **only** to SOAR Leads. It displays information about all SOAR users that fall within the Leader’s Agency, Cities/Counties, or State and is very helpful for exporting a user contact list.
- Once a User Summary Report has been generated, you can export the information to Excel.

SOAR Users

[Export Report](#)

Show

Created	Login	First	Last	Email	St	Role	Agency	Cases	Status
10/17/22	11/02/22	Nate	LLTestLive	nate5@nextstepdigital.com	YY	Local Lead	New Agency Test	0	Inactive
10/12/22	10/12/22	Nate	TestingReg	nate3@nextstepdigital.com	YY	Case Worker	Agency Two	0	Approved
10/07/22	10/07/22	Nate	TestLocalLead	nate1@nextstepdigital.com	YY	Local Lead	Agency One	0	Approved
09/28/22	-	Nate	TestSept	nate2@nextstepdigital.com	YY	Case Worker	Agency Two	0	Approved
09/16/22	-	Mike	Kilpatrick	test4@nextstepdigital.com	YY	Case Worker	Agency One	0	Approved

SOAR Users Grid

Columns

- Date Account Created, Last Log-in, First/Last Name, Email, State, Role, Agency, Total Cases, Status
- Click on any column heading to sort.

View Agency/Applications

- Click on a user’s Agency name to view all users from that agency (this will take you to the Admin: Users page and automatically apply an Agency filter).
- Click on a user’s # of Cases to view all of their applications (this will take you to the Applications Page and automatically apply a User filter).

Filters

- Agency Leads can filter by User Role, Training Type, Funding Type, and Status.
- Local Leads can also filter by County.
- State Leads can also filter by City.

If you have any questions about SOAR OAT

please contact the SAMHSA SOAR TA Center at soaroot@prainc.com