Dashboard Navigation

And

Reports Guide
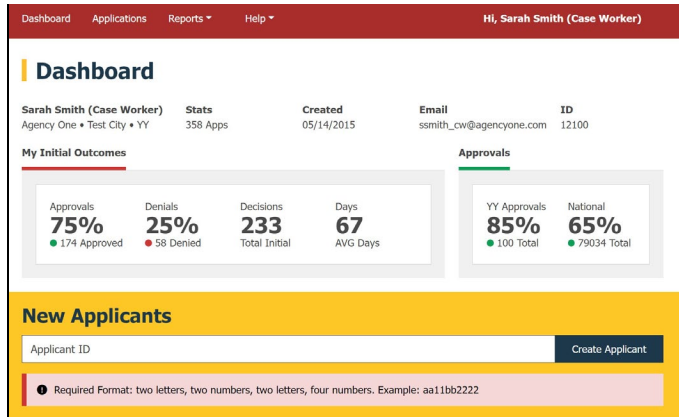
Table of Contents

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

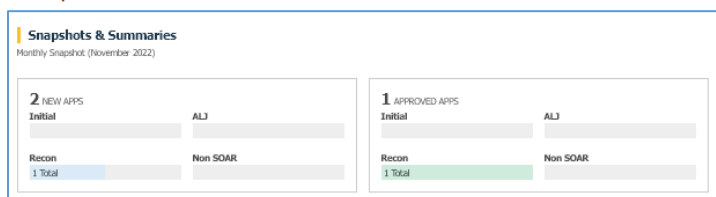- State/National Approval Rate: based on outcomes reported in the previous fiscal year, including those not entered into OAT.

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.

Case Worker Dashboard

Applications Grid

Pending Applications

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

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
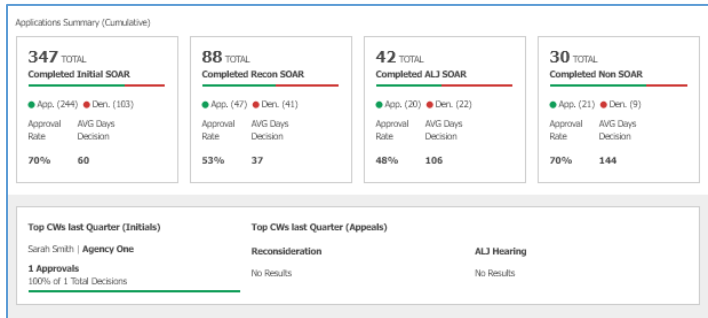
Applications Summary (Cumulative)
- Approval Rates and Average Days to Decision for all of your Agency's completed applications.

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

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

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
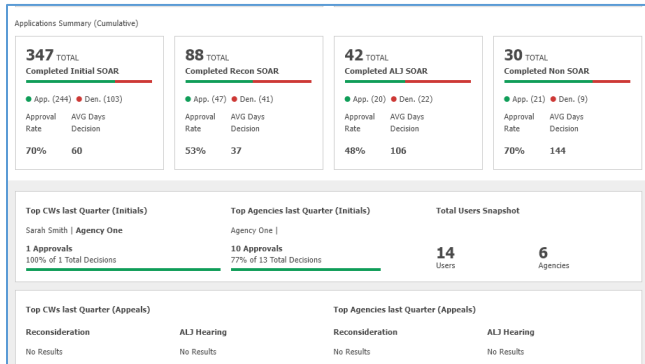
Applications Summary (Cumulative)
- Approval Rates and Average Days to Decision for all completed applications in the Local Lead's assigned cities/counties

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

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

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
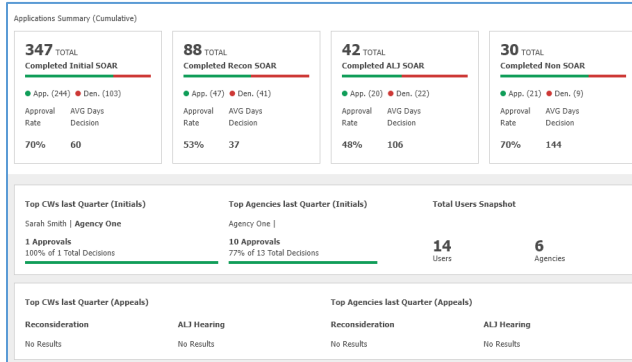
Applications Summary (Cumulative)
- Approval Rates and Average Days to Decision for all completed applications in your State

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

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

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

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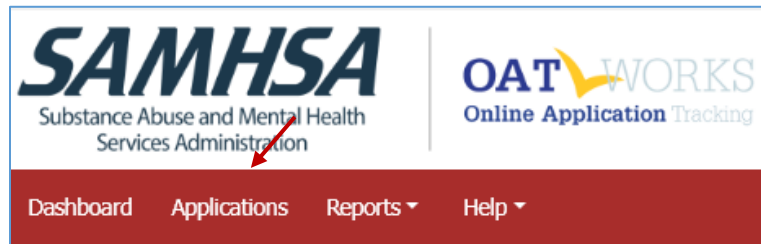
- The Applications page can be accessed from the menu bar
- This page allows all users to view their *own* applications, and also allows SOAR Leads to view all applications entered by Case Workers from their assigned Agency, Cities/Counties, or State.
- Applications are grouped by Application Type (New,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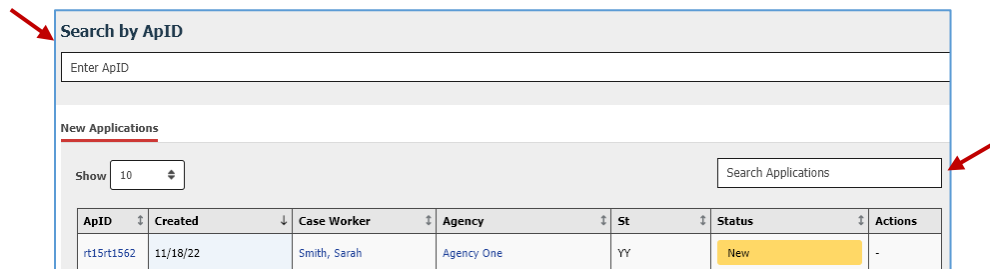
View/Edit Applications

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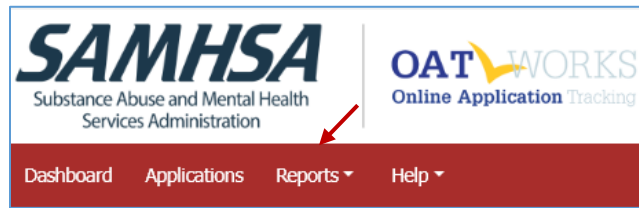
- The "Reports" feature can be accessed from the Menu Bar.
- A drop-down menu allows users to select "Individual" or "Summary" Reports (All Roles), as well as "User Summary Reports" (SOAR Leads only).
- **Only applications that have received a decision will appear in Reports.**

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	▪ Their own application entries*	Tracking successes and considering areas where technical support is needed to improve
Agency Lead	▪ Case workers assigned to your agency	Considering targeted technical assistance or reviewing outcomes at steering committee meetings
Local Lead	▪ 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	▪ 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.

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.

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.

Overview	Initial	Recon	ALJ
Approvals	244	47	20
Denials	103	41	22
Total Decisions	347	88	42
Approval Rate (%)	70%	53%	48%
Avg Days to Decision	60	38	107
Approved For			
SSI Only	146 (60%)	23 (49%)	8 (40%)
SSDI Only	19 (8%)	12 (26%)	2 (10%)
Both	68 (28%)	11 (23%)	8 (40%)
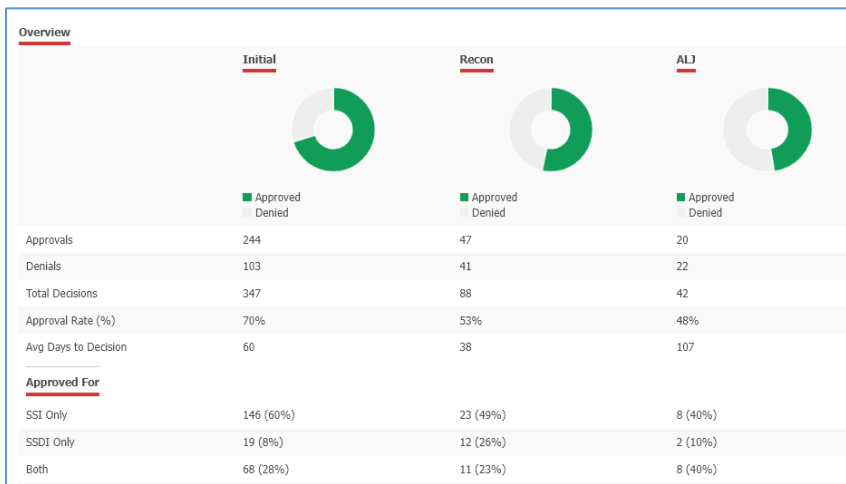
Optional Information Summary Report

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 Reimbursements	Initial SOAR	Reconsideration	ALJ Hearings
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."

Veteran	Age	Living Situation	Filter by Date of Decision
Show All	Show All	Select All Outdoors (e.g., street, abandoned t Shelter Transitional Own or someone else's apartment, SRO, boarding house Residential treatment for adults	01/01/2000 - 11/21/2022

Filter   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 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 soaroat@prainc.com