



# Dashboard Navigation And Reports Guide

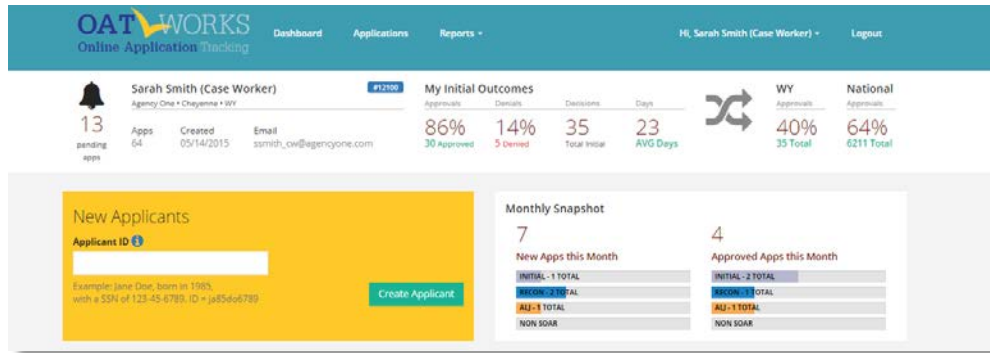
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# SOAR Online Application Tracking (OAT) Dashboard and Reports Guide

## Dashboard – All Users

When you log-in to OAT, you will be directed to the dashboard. The information displayed on the dashboard is dependent on the user’s role.



### Menu Bar

The top Menu Bar allows you to navigate between the Dashboard, Applications page, and Reports page. You can also access your profile page by clicking on your name on the top right. You can edit your name, phone, email address, and password, but you are not able to change your location, role or agency.

### User Summary

Just below the Menu Bar is a white bar with summary information for the user.

- User Details
  - Name, Agency, Location, E-mail, Created (Date OAT account was created)
  - Pending Apps: Total number of applications that have a protective filing date entered but do not yet have a decision entered
  - Apps: Total number of applications entered in OAT regardless of type or decision status
- My Initial Outcomes: Outcomes for initial applications that have a decision entered into OAT.
- State Outcomes: The state approval rate is updated annually by the SOAR TA Center.
- National Outcomes: The total applications listed represent how many were tracked in OAT. The approval rate is based on outcomes reported by all states in the previous fiscal year, including those not tracked in OAT.

### Application Entries

The gold box is where you can enter applications to be tracked. All user roles have the ability to enter applications to be tracked. Please see the OAT Application Entry section for more detailed information.

### Monthly Snapshot

The monthly snapshot breaks down what activity has been tracked in the current month. It displays the types of applications tracked and the total approvals for each type.

--- The Remainder of the Dashboard differs based on OAT User Type ---

## Case Worker Dashboard

### Applications Grid

#### Pending Apps View

Sarah Smith - Pending Applications

Application Type: Show All Export CSV

Show 10 entries Search:

ApID	PFD Date	App Date	Type	Status	Actions
jc12jc1212	-	-	-	NEW	Continue
ja99pi3456	-	-	-	NEW	Continue
jd12jd1212	-	-	-	NEW	Continue
ps12ps1212	-	-	-	NEW	Continue
ll78ll7985	-	-	-	NEW	Continue
jd81de1111	-	-	-	NEW	Continue
yy99yy9999	-	-	-	NEW	Continue
lu81po3893	-	-	-	NEW	Continue
ba55va1866	-	-	Reconsideration using SOAR	PENDING	Continue
jo78sm1119	-	-	-	NEW	Continue

Showing 1 to 10 of 13 entries Previous 1 2 Next

#### Status

- New: Only applicant demographic information is entered. “Application Type” needs to be selected.
- Pending: Although an application type has been selected, a “Decision Date” has not been entered. The application entry is pending a decision.
- Take “Action” on a case by clicking the Continue button in the Action column.

#### Sort

- Click on column heading to sort by: ApID, PFD, or Type.

## All Apps View

Pending Apps **All Apps**

Sarah Smith - Current Applications

Application Type: Show All

Show 10 entries Search:

ApID	Current App	Current Status	Days	# Apps	Actions
ab68os1234	Initial SOAR Application	APPROVED	66	3	Actions
ab68os1235	Initial SOAR Application	APPROVED	31	1	Actions
ab74os1235	Initial SOAR Application	APPROVED	30	1	Actions
aw12aw1212	Non-SOAR Claim	DENIED	2	0	Continue
ba55va1866	Reconsideration using SOAR	PENDING	-	0	Continue
by84ki9998	Initial SOAR Application	APPROVED	28	1	Actions
by84ki9999	Initial SOAR Application	APPROVED	85	1	Actions
By90ki1234	Initial SOAR Application	APPROVED	38	1	Actions
cr79ca1234	Initial SOAR Application	APPROVED	0	1	Actions
de22mc9876	Initial SOAR Application	APPROVED	31	1	Actions

Showing 1 to 10 of 60 entries

Previous 1 2 3 4 5 6 Next

### Current Status

- Approved, Denied, Pending and New

### Actions

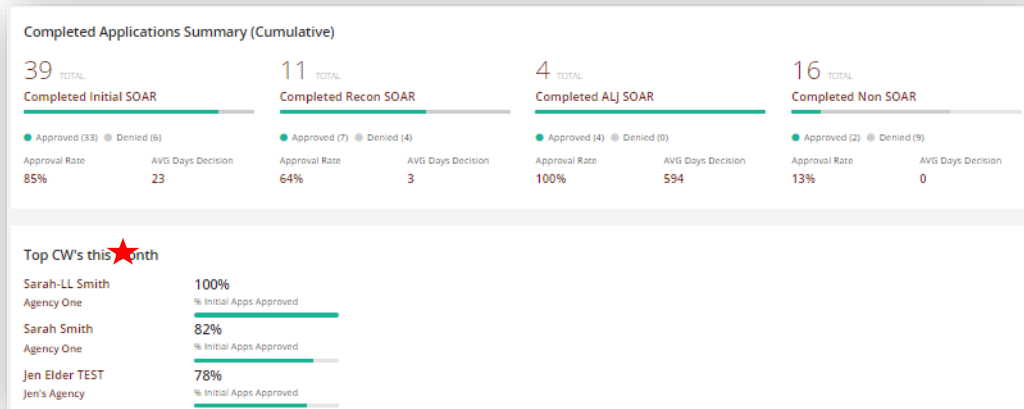
- For cases that have a decision, you can choose two Actions: Post Decision and Overview.
  - Post Decision will allow you to enter in the optional financial information
  - Overview will give you a summary of that application detail
- For cases that are still pending, you can choose to continue.

### Sort

- Click on column heading to sort by: ApID or Current App.

## Agency Lead Dashboard

### Completed Applications Summary



- Agency Leads can view a progress bar for all application types.
- Top CW's this Month displays the top caseworkers within the agency and a progress bar of their initial application approval rates.★

## Applications Grid

### Pending Apps View

ApID	PFD Date	App Date	Case Worker	Type	Status	Actions
ba55va1866	-	-	Smith, Sarah	Reconsideration using SOAR	PENDING	Continue ▶
dw68dz1234	02/01/2016	02/29/2016	Smiths, Sarah	Initial SOAR Application	PENDING	Continue ▶
ja85do6789	12/15/2015	12/15/2015	Smiths, Sarah	Initial SOAR Application	PENDING	Continue ▶
ja99pi3456	-	-	Smith, Sarah	-	NEW	Continue ▶
jc12jc1212	-	-	Smith, Sarah	-	NEW	Continue ▶
jd12jd1212	-	-	Smith, Sarah	-	NEW	Continue ▶
jd81de1111	-	-	Smith, Sarah	-	NEW	Continue ▶
jo11sm1111	01/01/2015	-	Smiths, Sarah	Initial SOAR Application	PENDING	Continue ▶
jo78sm1119	-	-	Smith, Sarah	-	NEW	Continue ▶
lj78lj7985	-	-	Smith, Sarah	-	NEW	Continue ▶

- View all agency applications that are in Pending or New status.
- Click on column heading to sort by: ApID, PFD Date, Caseworker, or Type.
- Take "Action" on a case by clicking the Continue button in the Action column. For cases that are "Pending" or "New" you will be redirected to the point where the application needs to be completed.

## Case Workers View

Pending Apps **Agency One Case Workers**

Agency One - Users

Users

Show All

Show 10 entries Search:

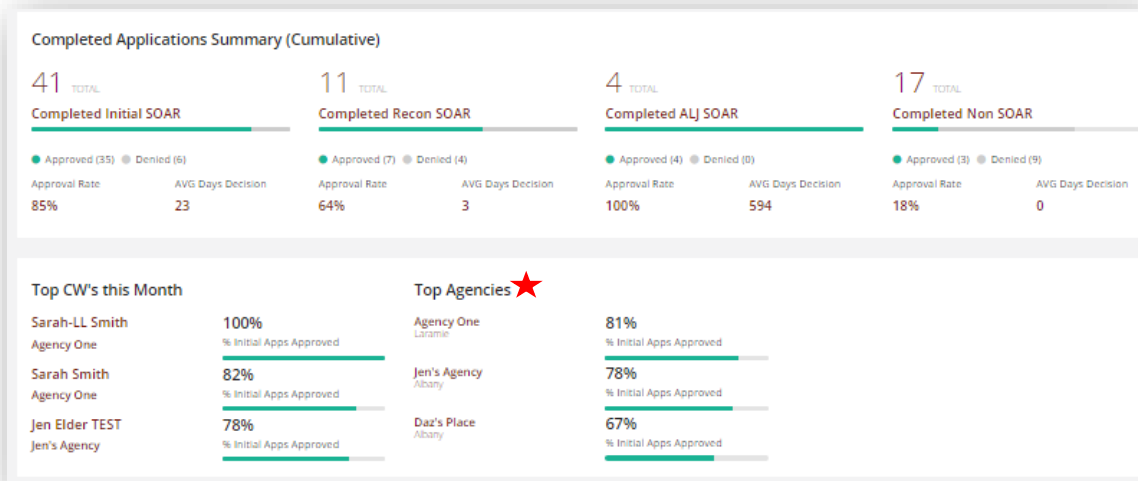
Case Worker	Approvals/Denials	Decisions	Days	Actions
Kilpatrick, Mike	/		0	Actions -
Kilpatrick, Mike	0 / 0	0	0	View Applications
Kilpatrick, Mike	/		0	Actions -
Nagele, Joe	/		0	Actions -
Smith, Sarah	40 / 9	49	70	Actions -
Smith, Sarah	/		0	Actions -
Tester, Alpha	0 / 0	0	0	Actions -

Showing 1 to 7 of 7 entries Previous 1 Next

- View the progress of each caseworker assigned to your agency.
- Columns include caseworker name, approvals/denials, total number of decisions, and days to decision for the cases they have entered.
- Clicking the name of the caseworker OR clicking the “Actions” button will direct you to the Applications page for that caseworker.

## Local Lead Dashboard

### Completed Applications Summary



- Local Leads can view a progress bar of all application types within their assigned locality.
- Top CW's this Month displays the top caseworkers within their assigned locality and the progression bar of approval rates for initial applications.
- Displays the top agencies and a progress bar of the initial approval rates for each agency. ★

## Applications Grid

### Pending Apps View

ApID	PFD Date	App Date	User	Role	Type	Status	Actions
ba55va1866	-	-	Smith, Sarah	Case Worker	Reconsideration using SOAR	PENDING	Continue
dw68dz1234	02/01/2016	02/29/2016	Smiths, Sarah	State Lead	Initial SOAR Application	PENDING	Continue
ja85do6789	12/15/2015	12/15/2015	Smiths, Sarah	State Lead	Initial SOAR Application	PENDING	Continue
ja99pi3456	-	-	Smith, Sarah	Case Worker	-	NEW	Continue
jc12jc1212	-	-	Smith, Sarah	Case Worker	-	NEW	Continue
jd12jd1212	-	-	Smith, Sarah	Case Worker	-	NEW	Continue
jd81de1111	-	-	Smith, Sarah	Case Worker	-	NEW	Continue
jo11sm1111	01/01/2015	-	Smiths, Sarah	State Lead	Initial SOAR Application	PENDING	Continue
jo78sm1119	-	-	Smith, Sarah	Case Worker	-	NEW	Continue
ij78ij7985	-	-	Smith, Sarah	Case Worker	-	NEW	Continue

- View all applications that are in Pending or New status within assigned locality.
- Click on column heading to sort by: ApID , PFD Date, User, Role, or Type



## All Apps View

Pending Apps **All Apps**

Agency One (Local Lead) - Applications

Users  
Show All

Show 10 entries Search:

ApID	Current App	Current Status	Days	# Apps	Actions
ab68os1234	Reconsideration using SOAR	APPROVED	31	3	Actions
ab68os1235	Reconsideration using SOAR	PENDING	-	1	Post Decision Overview Actions
ab74os1235	Initial SOAR Application	APPROVED	30	1	Actions
an90de0987	Initial SOAR Application	APPROVED	61	1	Actions
by84ki9998	Initial SOAR Application	APPROVED	28	1	Actions
by84ki9999	Initial SOAR Application	APPROVED	85	1	Actions
By90Ki1234	Initial SOAR Application	APPROVED	127	1	Actions
By96Ki6789		NEW	-	0	Continue
cr79ca1234	Initial SOAR Application	APPROVED	0	1	Actions
cr79ca1235	Initial SOAR Application	APPROVED	28	1	Actions

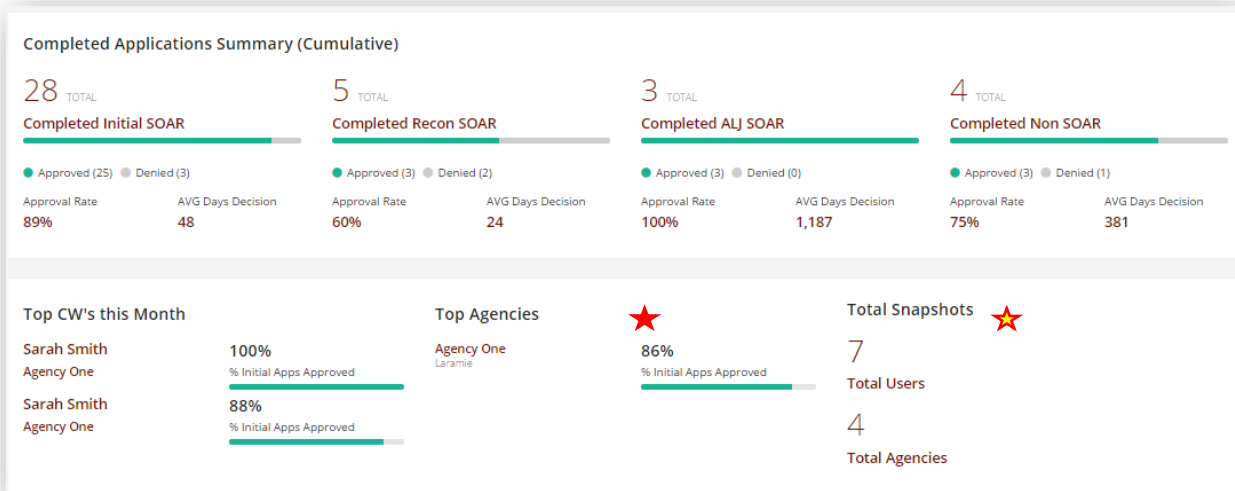
- Local Leads can view ALL applications in assigned locality
- Click on column heading to sort by: ApID or Current App, Current Status

### Actions

- User can enter post decision information for cases that have been decided.
- For pending or new cases, the actions button will direct user to the applications page to continue the entry.

## State Team Lead Dashboard

### Completed Applications Summary

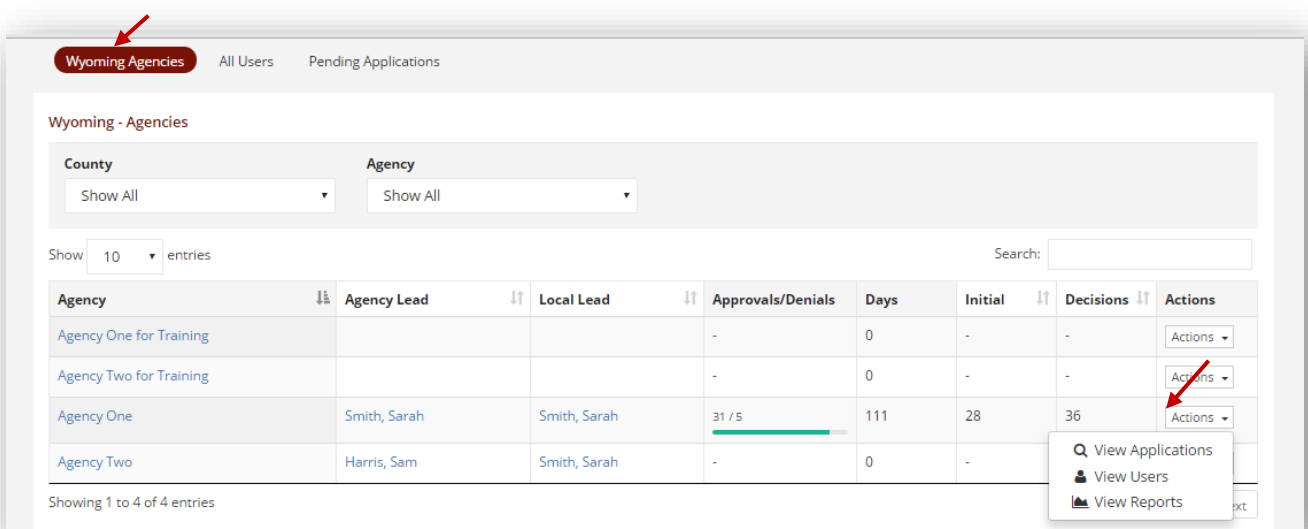


- The State Team Lead can view a progression bar of all application types across the state.
- Displays the top caseworkers and agencies
- Displays statewide approval rates for initial applications across the state. ★
- Displays the state’s “Total Snapshot” of the number of users and agencies. ★

### Applications Grid

For State Team Lead users, the Application Grid allows you to toggle between agencies and users and view all “Pending Application” types across the state. Information can be sorted by county and agency.

#### State Agencies View



State Agencies View displays:

- Name of the agency - Clicking the name will take you to the User page for that agency where you can view all users in that agency.
- The Agency Lead and Local lead for each agency - Clicking the name of the Agency or Local Lead will direct you to the applications page associated with that agency or locality.
- A progression bar of approvals and denials for all applications
- The number of initial applications that were submitted
- The total number of decisions for all applications
- The “Actions” button will allow you view applications from the agency, view users of the agency and view the overall state progress graph report (see below).

### All Users View

Created	Last Name	Email	State	Role	Agency	Status	Actions
05/14/2015	Harris	sharris_al@agencytwo.com	WY	Agency Lead	Agency Two	Approved	Actions
05/14/2015	Jones	ljones_cw@agencytwo.com	WY	Case Worker	Agency Two	App	View Cases
05/14/2015	Smith	ssmith_cw@agencyone.com	WY	Case Worker	Agency One	Approved	Actions
05/14/2015	Smith	ssmith_ll@agencyone.com	WY	Local Lead	Agency One	Approved	Actions
05/14/2015	Smith	ssmith_stl@agencyone.com	WY	State Lead	Agency One	Approved	Actions
05/14/2015	Smith	ssmith_al@agencyone.com	WY	Agency Lead	Agency One	Approved	Actions
12/15/2015	Nagele	njeves@outlook.com	WY	Case Worker	Agency One	Approved	Actions

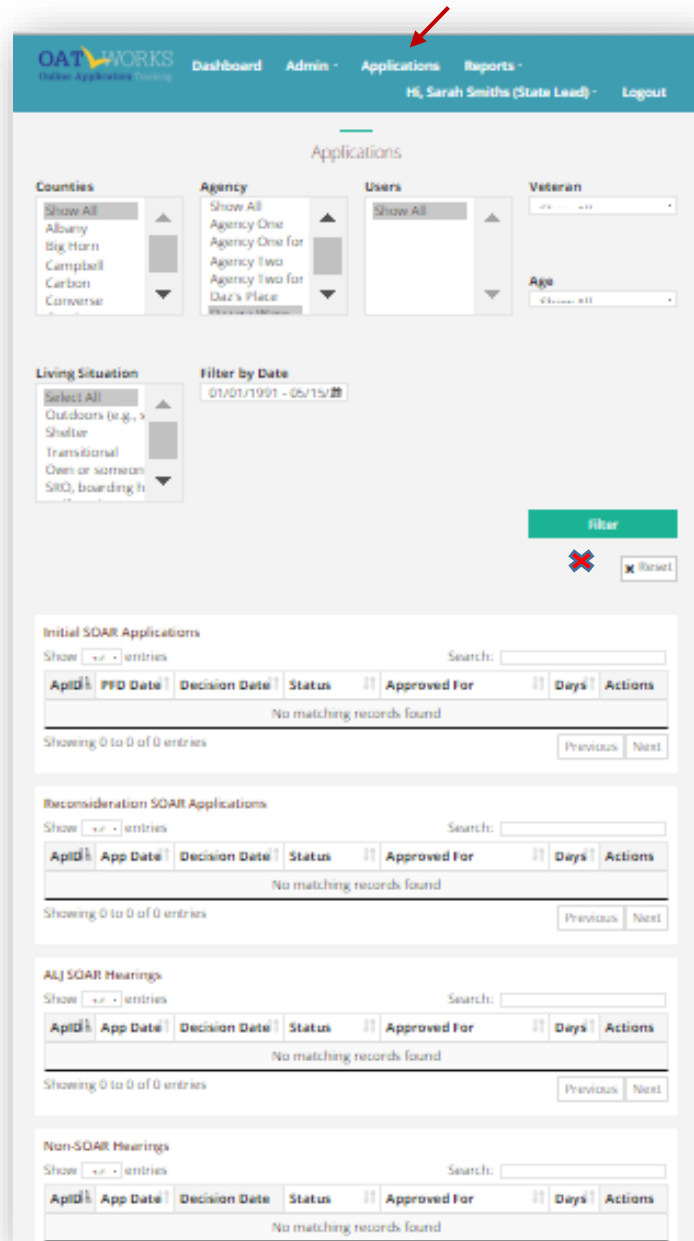
Showing 1 to 7 of 7 entries

State Team Leads can view:

- Date that a user created a profile, the user’s name, email, state, role and agency name. The status of the user will be recorded as approved, pending or inactive.
- The “Actions” button will direct you to the applications page for the user.

## Applications Page

The Applications page can be accessed from the menu bar.



The Application page offers the following features:

- Filter and sort applications by Veteran status, age, living situation and date. Click “Reset” to clear filter selections. ❌
- View Application types in separate tables. Archived applications can be viewed here.
- State Leads, Local Leads, Agency Leads, and case workers can take “Action” and gain access to post decision information and the case overview for cases with a decision.
- State Leads, Agency Leads and Local leads do not have the ability to take “Action” for pending or new cases (the assigned caseworker will need to complete this information).

## Applicant Overview

**Applicant Overview**

**ab68os1234**  
 Created: 07/15/2015  
 Cheyenne, WY  
 Reconsideration using SOAR - Approved

**3 Total Decision(s)**

Age: 45      Sex: Male  
 Military: No      Assistance: No  
 Working? No      Housing Status: SRO, boarding house

CASE WORKER  
**Sarah Smith**  
 Agency One

Initial SOAR    Reconsideration    **Current**    ALJ Hearing

Approved on June 15, 2014

Approved for:  
 Both SSI & SSDI

Was applicant housed at decision?      Did access to benefits facilitate housing?  
 -      -

Representative Payee Needed?  
 Yes

Protective Filing Date:	02/15/2014
Application Date:	04/10/2014
Completed SSA 1696?	No
Medical Records Collected?	Yes
MSR	Yes
MSR Co-Signed?	No
Quality of Review	No
CE Exam Ordered?	-

**Applicant Created**

GENDER	AGE	CASE WORKER
M	45	Sarah Smith

July 15, 2015

**Initial SOAR Application - Details**

APP DATE	SSA 1696?	MSR?
04/10/14	No	Yes
MEDICAL RECORDS	QUALITY REVIEW	
Yes	No	

February 15, 2014

**Initial SOAR Application - Decision**

STATUS	DECISION DATE	DAYS DECISION
Approved	06/15/14	66

June 15, 2014

**Initial SOAR Application - Post Approval**

STATUS	ACTIONS
Completed	Edit/Review

Reconsideration using SOAR -

The Applicant Overview shows the activity associated with a specific ApID chosen from the Applications Page.

- A green thumbs up indicates that the claim was approved.
- The applicant ID, applicant’s demographic information, caseworker and agency is provided at the top of the page.
- The total number of application decisions associated with the ApID is indicated in the top middle section of the page.
- Users can toggle between Initial SOAR, Reconsideration and ALJ Hearings. The word “Current” will appear next to the current application type.
- An overview of the activity about the applicant as they progressed through application types is also provided (if the applicant was denied and needed to appeal).

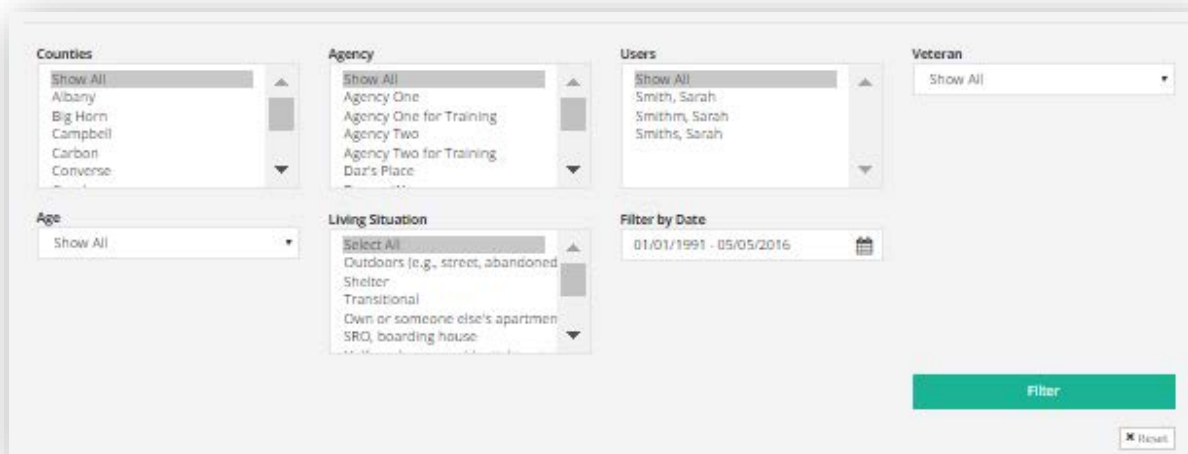
## Reports

The “Reports” feature can be accessed from the Menu Bar. *We recommend that reports be used to celebrate the success of individual case workers, agencies and localities that are promoting SOAR with great outcomes!*



## Using Filters

When running Reports, users can utilize filters to change the report parameters.



### Filters Available to All Users

#### *Veteran*

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

#### *Living Situation*

You can select one type or hold the Shift or Control key while you click on/select more than one. (If you are looking to sort out applicants who were not experiencing or at-risk of homelessness, then choose “Non-SOAR” report type discussed under Summary Reports).

#### *Age*

- *Minors:* SSI applications for children under the age of 18. The SOAR TA Center does not track or report on child applications, but caseworkers can store data on these cases in OAT.
- *Over 18:* SSI/SSDI applications for adults age 18 and over
- *Custom:* Customize your age parameters
- *Show All:* Includes both adult and child applications.

*National SOAR outcome reports will only include SOAR entries that have a decision for those applicants 18 and over for the reporting period starting July 1-June 30 of each year.*

### Role-Based Filters

Filters such as Counties, Agency, and Users (i.e. Caseworkers) are available based on the user’s role and the data that is available to them.

Role	Can Access Data From...	Reports Most Helpful for...
Caseworker	<ul style="list-style-type: none"> <li>▪ Their own application entries</li> </ul>	Tracking successes and considering areas where technical support is needed to improve
Agency Lead	<ul style="list-style-type: none"> <li>▪ Assigned agency</li> <li>▪ All caseworkers assigned to that agency</li> </ul>	Considering targeted technical assistance or reviewing outcomes at steering committee meetings
Local Lead	<ul style="list-style-type: none"> <li>▪ One or multiple counties/localities/regions</li> <li>▪ Agencies assigned to these localities</li> <li>▪ Caseworkers from those agencies</li> </ul>	Reviewing outcomes across agencies and counties and considering areas for additional follow-up support
State Lead	<ul style="list-style-type: none"> <li>▪ All caseworkers from all agencies in all localities across the state</li> </ul>	Reviewing state plans, considering targeted technical assistance for agencies or localities and determining areas where additional SOAR support is needed

### Report Types

A drop-down menu allows users to select either “Individual” or “Summary” Reports

#### Individual Reports

These reports display data for all individual application entries based on the parameters chosen using filters. Only cases that have a decision will appear in the reports section. Use the gray bar at the bottom to scroll across the screen to view all the data.

**Individual Reports**

Counties/Parishes: Show All, Test County

Agency: Show All, Agency One, Agency One for Training, Agency Two, Agency Two for Training

Users: Show All, Harris, Sam, Jones, Lucy, Nagle, Joe, Nagle, Josef, Smith, Sarah

Veteran: Show All

Age: Show All

Living Situation: Select All, Outdoors (e.g., street, abandoned shelter), Transitional, Own or someone else's apartment, SRG, boarding house

Filter by Date: 01/01/2005 - 01/30/2017

Filter

Initial SOAR Applications

Show 10 entries

Case Worker	AgeID	Gender	Age	Veteran	DischargeStatus	VA Disability Compensation	Applicant Working During Application Proc
Smith, Sarah	sm71gg5156	M	45	N			N
Smith, Sarah	sm71n4440	F	45	V			N
Smith, Sarah	sm71yu6607	M	45	N			N
Smith, Sarah	sm85av6771	F	29	V			N
Smith, Sarah	sm85bc1234	M	45	N			N
Smith, Sarah	sm86rc1225	F	36	V			N
Smith, Sarah	sm86sc1238	M	36	V			N
Smith, Sarah	sm72bc2222	F		N			N
Smith, Sarah	sm87ac0245	M	33	N			N
Smith, Sarah	sm86bc9999	M	31	N			N

Showing 1 to 10 of 87 entries

### Summary Reports

There are three types of summary reports: *Overview*, *Optional*, and *Non-SOAR*. Only records with a date of decision entered are included in Summary Reports. Pending applications will not appear.

#### Overview Summary Report

Below is an example of a State Team Lead’s Overview Summary Report.



**OAT WORKS**  
Online Application Tracking

Dashboard Admin Applications Reports Hi, Sarah Smiths (State Lead) Logout

### Summary Reports

Report Type  
 Overview (default)  Optional Information  Non-Soar

**Counties:** Show All, Albany, Big Horn, Campbell, Carbon, Converse  
**Agency:** Show All, Agency One, Agency One for Training, Agency Two, Agency Two for Training, Daz's Place  
**Users:** Show All, Elder TEST, Jen, Harris, Sam, James, Bailey, Jones, Lucy, Kliparrick, Mike  
**Veteran:** Show All  
**Age:** Show All  
**Living Situation:** Select All, Outdoors (e.g., street, abandoned), Shelter, Transitional, Own or someone else's apartment, SRD, boarding house  
**Filter by Date:** 01/01/1991 - 05/05/2016

**Filter**

Export Summary PDF Reset

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**OVERVIEW**

**Initial SOAR**

Approved: 37, Denied: 8

**Reconsideration**

Approved: 9, Denied: 5

**ALJ Hearings**

Approved: 7, Denied: 0

	Initial SOAR	Reconsideration	ALJ Hearings
Approvals	37	9	7
Denials	8	5	0
Total Decisions	45	14	7
Approval Rate (%)	82%	64%	100%
Avg Days to Decision	22	18	350

#### Optional Information Summary Report

This report provides a summary of Medicaid/Medicare reimbursements, back payments, and earnings if the applicant is working or was working when the application was submitted. The numbers presented are total amounts for all applicants for whom these data are entered. Below is an example of a State Team Lead's Optional Information Summary Report.

### Summary Reports

**Report Type**  
 Overview (default)  Optional Information  Non-Soar

**Counties:** Show All, Albany, Big Horn, Campbell, Carbon, Converse

**Agency:** Show All, Agency One, Agency One for Training, Agency Two, Agency Two for Training, Dox's Place

**Users:** Show All, Eider-TEST, Jen, Harris, Sam, James, Bailey, Jones, Lucy, Kilpatrick, Mike

**Veteran:** Show All

**Age:** Show All

**Living Situation:** Select All, Outdoors (e.g., street, abandoned Shelter, Transitional, Own or someone else's apartment, SRQ, boarding house

**Filter by Date:** 01/01/1991 - 05/05/2016

**Filter**

[Export Summary](#) [PDF](#) [Reset](#)

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**OPTIONAL INFORMATION**

REIMBURSEMENTS	Initial SOAR	Reconsideration	ALJ Hearings
<b>Medicare</b>			
Total dollar amount	\$16,223.00 (12)	\$14,842.00 (5)	\$20,015.00 (4)
Average per applicant	\$1,351.92	\$2,968.40	\$5,003.75
<b>Medicaid</b>			
Total dollar amount	\$24,362.00 (14)	\$629.00 (3)	\$1,303.00 (3)
Average per applicant	\$1,740.14	\$209.67	\$434.33
<b>General or Public Assistance</b>			
Total dollar amount	\$11,167.00 (11)	\$1,727.00 (5)	\$1,354.00 (4)
Average per applicant	\$1,015.18	\$345.40	\$338.50

### Non-SOAR Summary Report

SOAR-trained case managers sometimes provide basic assistance to an applicant who already has an application well in process or who is not appropriate for SOAR services. This type of application can be tracked in OAT, and could be included in the total applicants that a case manager is responsible for. Please note that if a case manager becomes a Representative (via the SSA-1696), collects medical records, and/or writes a Medical Summary Report, we consider that to be a SOAR application, as long as the applicant is experiencing or at-risk of homelessness.

### Export to Excel or Display as a PDF

Once any type of report has been generated, you have the option to export the information to Excel, or display and print as a PDF. These options are located just below the “Filter” button.

If you have any questions about SOAR OAT reports,  
 please contact the SOAR TA Center at [soaroat@prainc.com](mailto:soaroat@prainc.com).