

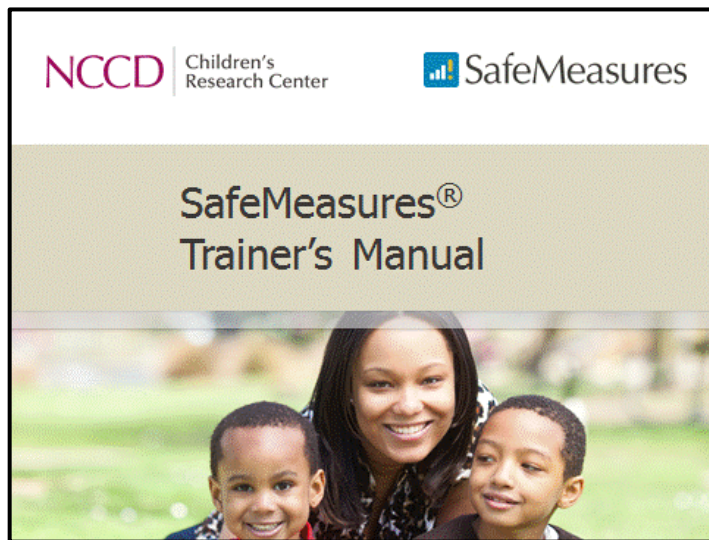


SafeMeasures[®] Training Manual

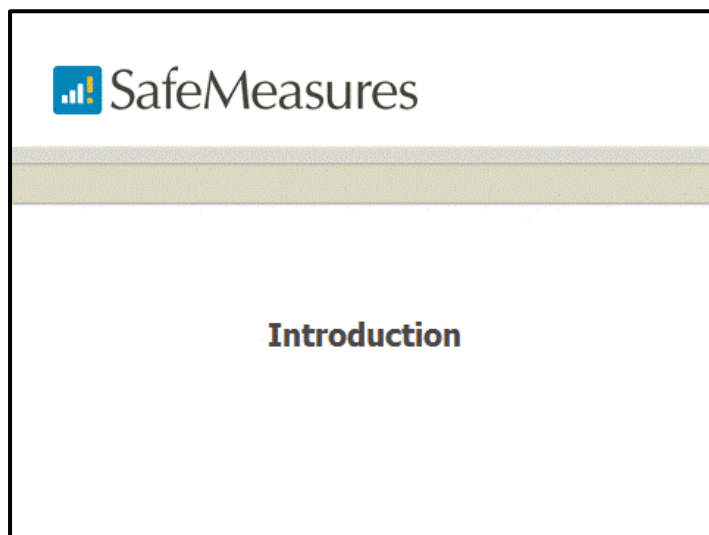


California Department of Social Services

Slide 1



Slide 2



Slide 3

**SafeMeasures is a
quality improvement tool**

- ✓ **Contacted?**
- ✓ **Timely?**
- ✓ **Signed?**
- ✓ **Approved?**

SafeMeasures® is best described as a quality improvement tool.

Slide 4

**SafeMeasures presents
the information needed to:**

- Assess whether federal, state and local requirements are being met.
- Track agency, unit, and worker performance over time.
- Monitor workload.
- Identify out-of-compliance cases.

How does SafeMeasures serve as a quality improvement tool?

It presents the information needed to:

- Assess whether federal, state, and local requirements are being met.
- Track agency, unit, and worker performance over time.
- Monitor workload.
- Identify out-of-compliance cases.

Slide 5

**Using various reports, you can monitor
the quality of service at
various stages of a CPS case**

- ✓ **Contacted within
required timeframe?**
- ✓ **Timely investigations?**
- ✓ **How long has the case
been opened?**
- ✓ **Case plans approved?**

SafeMeasures contains a variety of reports. Each report presents data about a particular aspect of the case management process in an easy-to-read format such as a graph, a pie chart, or a table.

This presentation of data allows you to monitor the quality of service at various stages of CPS cases.

For example, SafeMeasures can tell you:

- Are in-person investigations being initiated within the

required timeframe?

- Are case plans being approved within the recommended number of days?
- Are monthly case contacts being made?

Slide 6

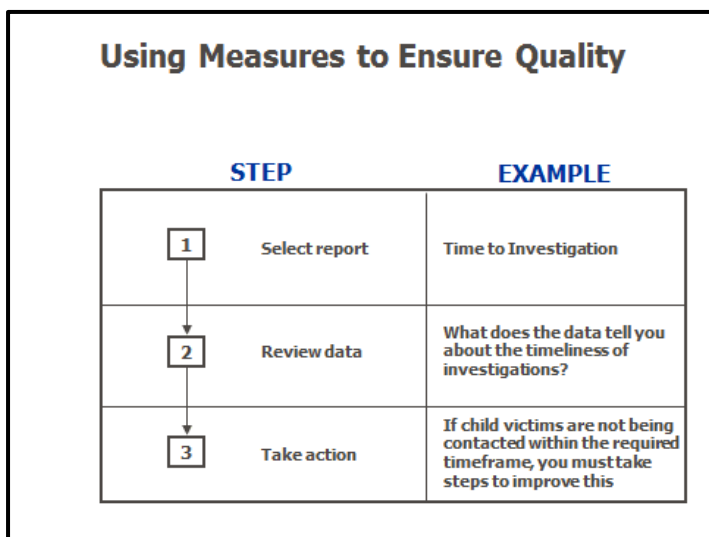
INFORMATION NEEDED	TYPICAL REPORT
Are child victims being contacted within the required timeframe?	Time to Investigation
Are case plans being approved within the recommended number of days?	Time to Approved Case Plan
Are monthly case contacts being made?	Face-to-Face Contacts

Each of these questions on this slide can be answered by looking at a related report in SafeMeasures.

- “Time to Investigation” will tell you if child victims are being contacted within the required timeframe.
- “Time to Approved Case Plan” will tell you if case plans are being approved within the recommended number of days.
- To see if monthly case contacts are being made, look at the

“Face-to-Face Contacts” report.

Slide 7

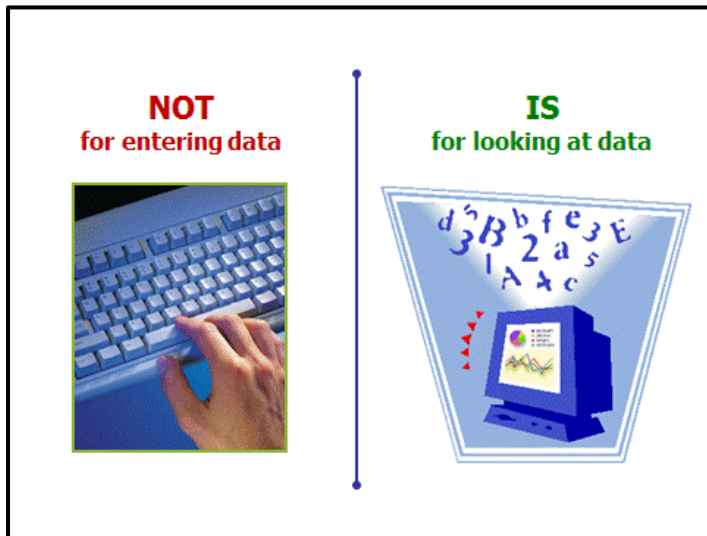


Let’s say, for example, you want to find out if in-person investigations are being initiated within the required timeframe.

- **Select the corresponding report in SafeMeasures.**
Example: Time to Investigation
- **Review the data.**
Example: What is it telling you about the timeliness of investigations?
- **Take Action.**
Example: If the data is telling you

that many in-person investigations are not being initiated within the required timeframe, you would need to take action to ensure improvement with timely in-person investigations.

Slide 8



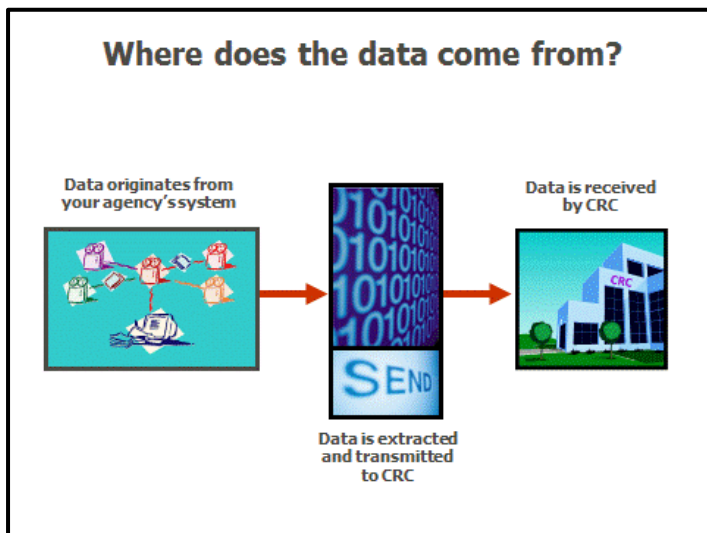
This example of how SafeMeasures is used to assure quality helps illustrate an important point about the application:

SafeMeasures is a data REPORTING system.

It is not a data ENTRY system.

You will use SafeMeasures to read data and to take action upon what you find. There is nothing to enter into SafeMeasures. It is simply a tool for you to gauge what is going on in your county, agency, or unit.

Slide 9

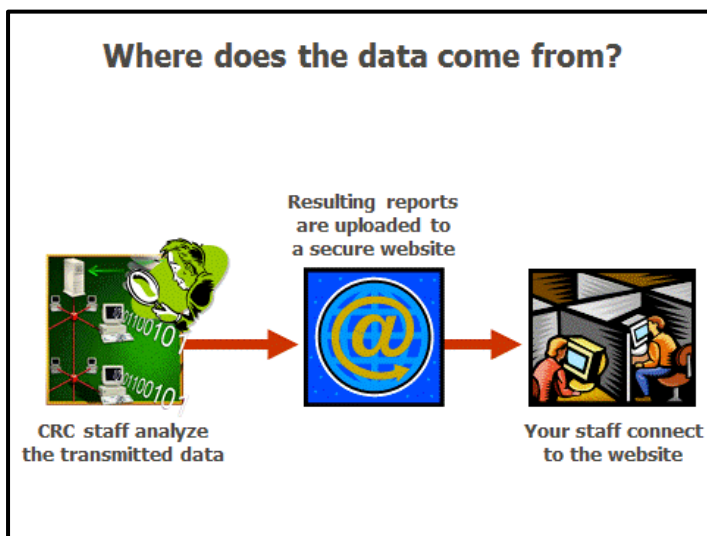


The data that appears in SafeMeasures originates from your agency's data system.

The steps involved in getting this data to appear in SafeMeasures are as follows:

- The data is first extracted from your system.
- The data is transmitted to CRC.
- CRC receives the data.

Slide 10



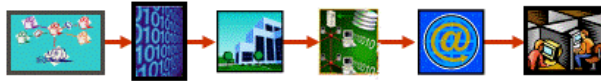
- Upon receiving the data, the staff at CRC analyzes the data and stores it in our own database.
- The analyzed data is uploaded to the SafeMeasures website.
- You login to SafeMeasures from your agency to see the data in an easy-to-read format.

Due to the sensitive nature of the data, SafeMeasures is only accessible from within your agency. In other words, you can't login to SafeMeasures from your home

computer.

Slide 11

SafeMeasures is updated nightly.



SafeMeasures is updated every night. That means that data you enter in CWS/CMS on Tuesday will be in SafeMeasures on Wednesday.

Slide 12



Open Microsoft Internet Explorer
app.safemeasures.org/training

Open the Training Version of SafeMeasures

Open Internet Explorer.

In the address bar, enter
<https://app.safemeasures.org/training>

Keep in mind that this is the URL for training. The actual application you will use in your jurisdiction will have a slightly different address. We will talk about this later in the training.

Slide 13

Log in to SafeMeasures

Password: training

SafeMeasures
Training Jurisdiction

User Name: Sarah
Password: training
Login
Forgot My Password

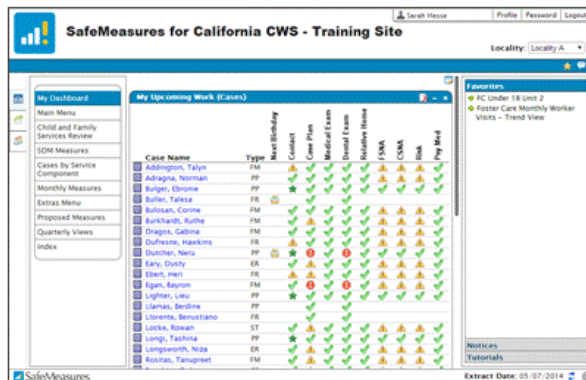
Login

To log in to the training version of SafeMeasures:

- Enter the training username assigned to you (student1 – student24)
- Enter the training password (training)
- Click the "Login" button

Slide 14

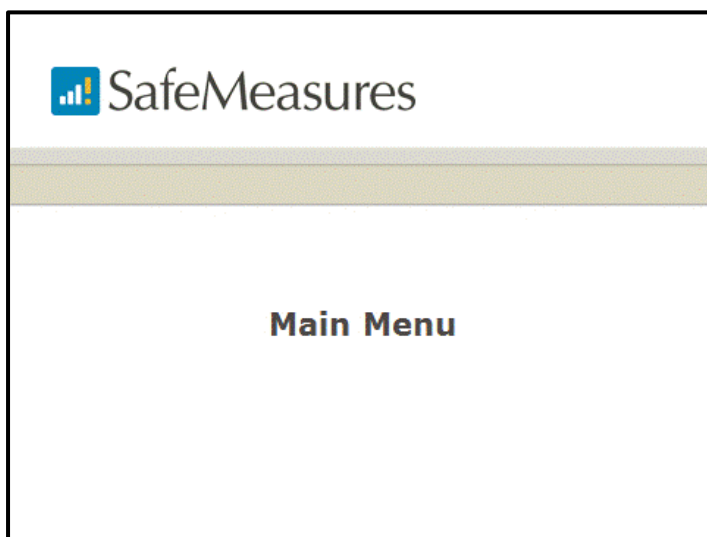
Once logged in, you will be at the main menu.



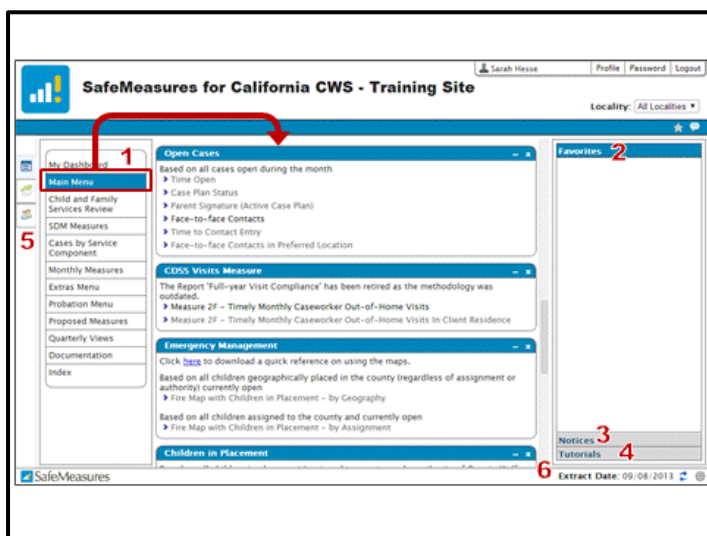
Once logged in, you will be taken to the main menu. The information on the opening screen depends on whether you have cases assigned in CWS/CMS. Workers and supervisors will see a dashboard for upcoming work. This summarizes status for upcoming critical activities.

More on the dashboard later.

Slide 15



Slide 16



Trainer Note: When you first open the training site, you will see the My Dashboard menu first. Click to the Main Menu menu before discussing these components.

Main Menu

The main menu contains measures organized by category.

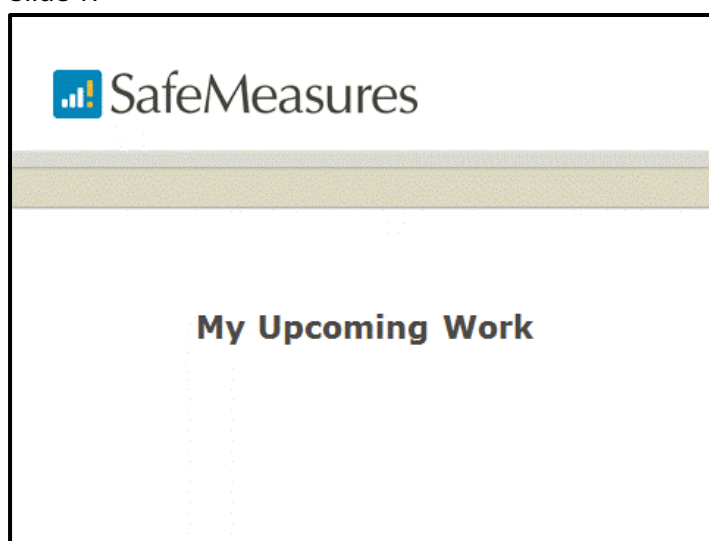
- The measures for whichever menu is highlighted will display in the middle panel.
- Favorites are stored in the Favorites panel.

- Any notices will be stored in the Notices panel.
- Tutorials are in the Tutorials panel.
- The usage report and user list are in the data panel.
- The extract date tells you the last time information was received from CWS/CMS

Trainer Notes:

- Use the cursor to direct attention to area on screen being discussed
- If someone in the room is having difficulty, pair with someone who is doing well on the computer
- Walk around the room and keep an eye on screens to identify anyone who does have difficulty

Slide 17



Slide 18

My Upcoming Work—Cases

Case Name	Type	Next Birthday	Contact	Case Plan	Medical Exam	Dental Exam	Relative Home	FSMA	CSMA	Risk	Pay Need
Addington, Talyn	FM										
Adragna, Norman	PP										
Bulger, Elbrone	PP										
Buller, Tatesa	FR										
Bulosan, Corine	FM										
Burkhardt, Ruthe	FM										
Dragos, Gabina	FM										
Dufresne, Hawkins	FR										
Dutcher, Nenu	PP										
Eary, Dusty	ER										
Ebert, Heri	FR										
Egan, Bayron	FM										
Lighter, Lieu	PP										
Llamos, Berdine	PP										
Llorente, Benustiano	FR										
Locke, Rowan	ST										
Longi, Tashina	PP										
Longworth, Niza	ER										
Rositas, Tanupreet	FM										
Routhier, Duke	PP										
Rupert, Adrian	FR										

The **My Upcoming Work (MUW)** display is a quick visual reference of upcoming work, based on the worker's CWS/CMS login. It is available on the **My Dashboards** menu.

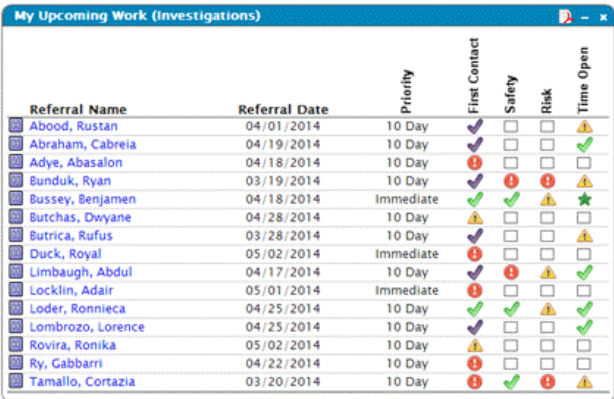
Each client for whom a worker has the primary assignment is listed, along with basic case information and icons that display whether pertinent tasks are coming due, overdue, etc.

Hover your mouse over an icon to see what it means. In general, the icons follow this pattern:

Green checkmark: No action required
 Yellow caution sign: Action required soon
 Red exclamation point: Action overdue

Slide 19

My Upcoming Work—Investigations



Referral Name	Referral Date	Priority	First Contact	Safety	Risk	Time Open
Aboud, Rustan	04/01/2014	10 Day	H			
Abraham, Cabreia	04/19/2014	10 Day				
Adye, Abasalon	04/18/2014	10 Day				
Bunduk, Ryan	03/19/2014	10 Day				
Bussey, Benjamin	04/18/2014	Immediate				
Butchas, Dwyane	04/28/2014	10 Day				
Butrica, Rufus	03/28/2014	10 Day				
Duck, Royal	05/02/2014	Immediate				
Limbaugh, Abdul	04/17/2014	10 Day				
Locklin, Adair	05/01/2014	Immediate				
Loder, Ronnica	04/25/2014	10 Day				
Lombrozo, Lorence	04/25/2014	10 Day				
Rovira, Ronika	05/02/2014	10 Day				
Ry, Gabbarri	04/22/2014	10 Day				
Tamallo, Cortazia	03/20/2014	10 Day				

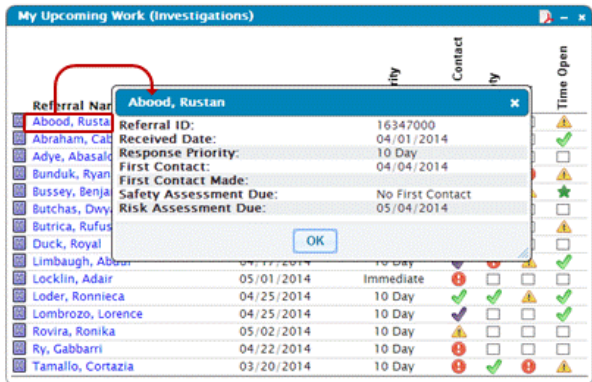
This is the MUW for investigation. It functions just like the case version, but with different tasks.

Features of the MUW:

- Each column can be sorted
- Hover your mouse over an icon or box to see details, such as when the task is due
- Access a client history by clicking the H icon
- PDF the MUW by clicking the PDF icon in the upper right

Slide 20

MUW Client Detail



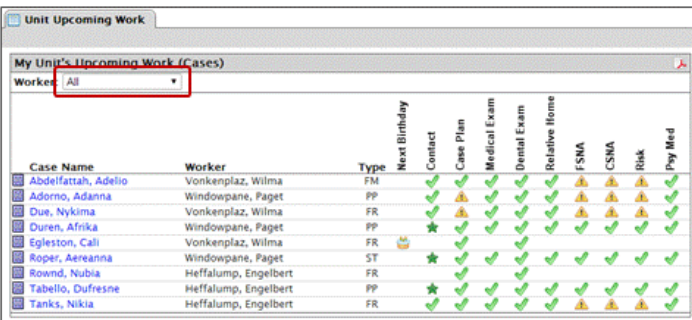
Referral Name	Referral Date	Priority	First Contact	Safety	Risk	Time Open
Aboud, Rustan	04/01/2014	10 Day	H			
Abraham, Cabreia	04/19/2014	10 Day				
Adye, Abasalon	04/18/2014	10 Day				
Bunduk, Ryan	03/19/2014	10 Day				
Bussey, Benjamin	04/18/2014	Immediate				
Butchas, Dwyane	04/28/2014	10 Day				
Butrica, Rufus	03/28/2014	10 Day				
Duck, Royal	05/02/2014	Immediate				
Limbaugh, Abdul	04/17/2014	10 Day				
Locklin, Adair	05/01/2014	Immediate				
Loder, Ronnica	04/25/2014	10 Day				
Lombrozo, Lorence	04/25/2014	10 Day				
Rovira, Ronika	05/02/2014	10 Day				
Ry, Gabbarri	04/22/2014	10 Day				
Tamallo, Cortazia	03/20/2014	10 Day				

Click a client's name for a pop-up with at-a-glance case/investigation information.

Click the H history icon to launch a full client history.

Slide 21

My Unit Dashboard for Cases



Case Name	Worker	Type	Next Birthday	Contact	Case Plan	Medical Exam	Dental Exam	Relative Home	F SNA	CSNA	Risk	Psy Med
Abdelfattah, Adelio	Vonkenplaz, Wilma	FM										
Adorno, Adanna	Windowpane, Paget	PP										
Due, Nykima	Vonkenplaz, Wilma	FR										
Duren, Afrika	Windowpane, Paget	PP										
Egleston, Cali	Vonkenplaz, Wilma	FR										
Roper, Aereanna	Windowpane, Paget	ST										
Rownd, Nubia	Heffalump, Engelbert	FR										
Tabello, Dufresne	Heffalump, Engelbert	PP										
Tanks, Nikia	Heffalump, Engelbert	FR										

This is the supervisor version of the MUW. It contains all of the same information as the worker MUW, and works exactly the same as the worker MUW, but it lists all clients assigned to all workers in a unit.

By default, all workers' cases will be displayed. Filter to a worker by selecting his/her name from the Worker drop-down box.

Demonstrate.

Slide 22

My Unit Dashboard for Investigations

Unit Upcoming Work

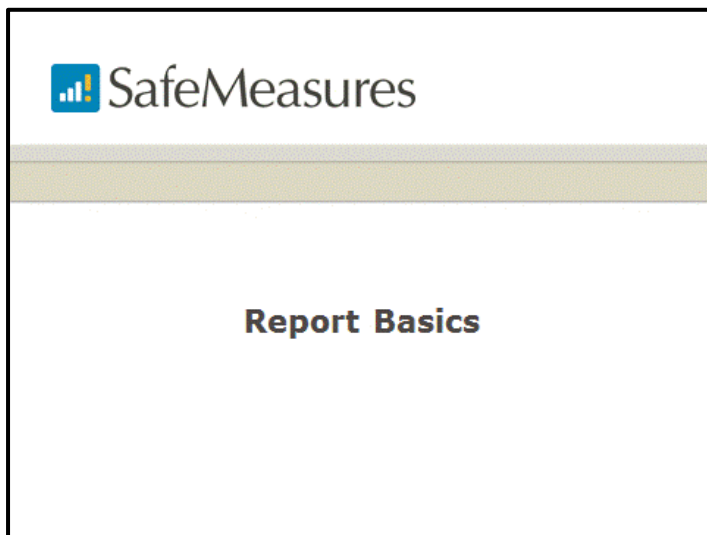
My Upcoming Work (Investigations)

Worker: All

Referral Name	Worker	Referral Date	Priority	First Contact	Safety	Risk	Time Open
Abdon, Taj	Drippenson, Carrie	04/21/2014	10 Day				
Dorward, Adonna	Chickenshorts, Goober	05/02/2014	10 Day				
Doughtery, Gale	Drippenson, Carrie	01/05/2014	10 Day				
Dricker, Cornell	Chickenshorts, Goober	05/01/2014	10 Day				
Duck, Royal	Frickenberger, Camille	05/02/2014	Immediate				
Ebanks, Costanz	Drippenson, Carrie	04/03/2014	10 Day				
Liso, Dorinda	Chickenshorts, Goober	04/30/2014	10 Day				
Lockridge, Abby	Chickenshorts, Goober	04/29/2014	10 Day				
Loder, Ronnica	Frickenberger, Camille	04/25/2014	10 Day				
Lorenzo, Cornell	Drippenson, Carrie	03/03/2014	Immediate				
Lorona, Garyka	Drippenson, Carrie	04/30/2014	10 Day				
Romo, Duron	Drippenson, Carrie	04/14/2014	10 Day				
Rossman, Earnie	Chickenshorts, Goober	03/28/2014	10 Day				
Rovira, Ronika	Frickenberger, Camille	05/02/2014	10 Day				
Rugh, Edgard	Drippenson, Carrie	05/01/2014	10 Day				
Tachino, Rye	Chickenshorts, Goober	04/28/2014	Immediate				
Taiese, Duong	Drippenson, Carrie	02/17/2014	10 Day				

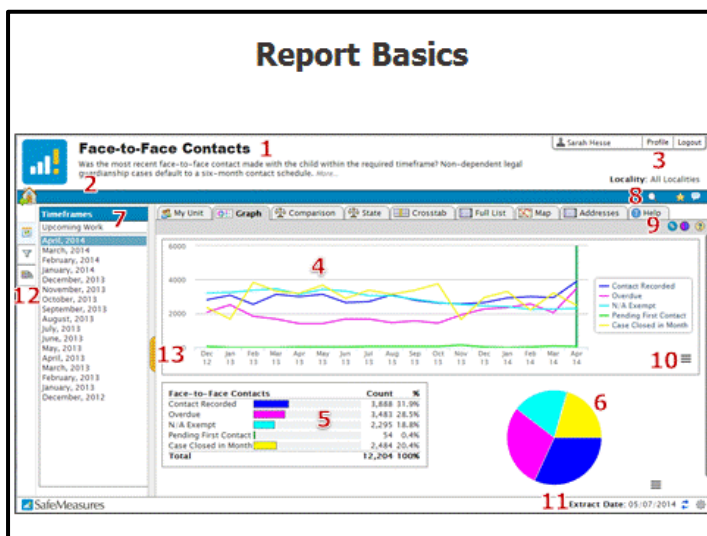
This is the investigations version. Again, sort any column, hover over an icon to see details, access histories, and see client details by clicking the client name.

Slide 23



Now we will look at a typical SafeMeasures report. Go back to the Main Menu, and open the Face-to-Face Contacts report.

Slide 24



We will now start looking at a few different reports in SafeMeasures.

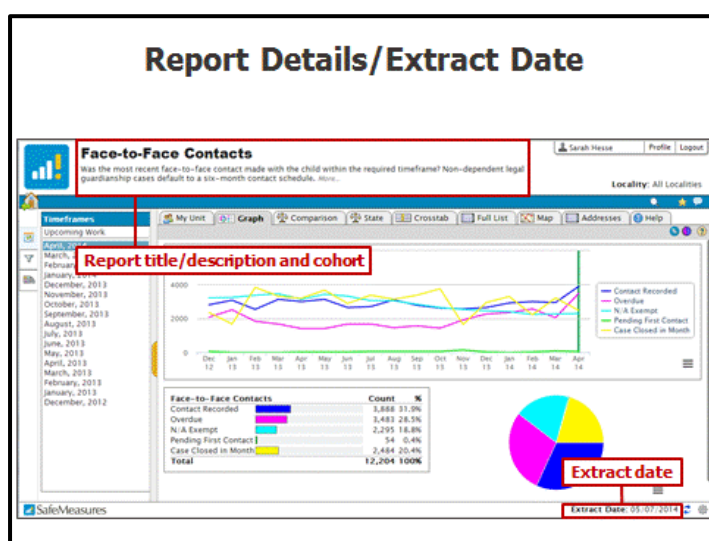
When you click on some reports, they may open to role-based tabs (either caseload or unit). We will discuss those tabs later. For now, we will start with the Graph View tab.

Here are the basic components of a report. These will be described in more detail later—this is merely an overview.

- Title /Description:** This describes what the report is measuring.

2. **Cohort Statement:** This indicates what population is included in the report (not included in this screenshot, but will be available on all live reports).
3. **Region:** This is defaulted to All Localities. Filter to a specific location from the main menu.
4. **Trend Graph:** This graph displays data over all timeframes.
5. **Data Table:** This displays the data for the currently selected timeframe.
6. **Pie Chart:** This also displays data for the currently selected timeframe.
7. **Timeframes:** Click a timeframe to change the data displayed on the Trend Graph and Data Table.
8. **Search:** Click the **Search** icon to search for either referral or case IDs.
- 9a. **Percent/Number:** The **Percentage/Number** icon toggles between percentage and numbered displays.
- 9b. **Compliance View:** The **Compliance** view removes categories not related to compliance.
- 9c. **Category Help:** Category help gives specific help on the report categories.
10. **Chart Context Menu:** Export graph data to an image file or Excel.
11. **Extract Date:** This indicates the currency of the data. It should always be one day behind.
12. **Data Panel:** This panel now contains the icons for filters and subsets. On the main menu, this panel will contain links to the user list and the usage report.
13. **Data Panel Tab:** Click the yellow tab to hide or display the data panel.

Slide 25



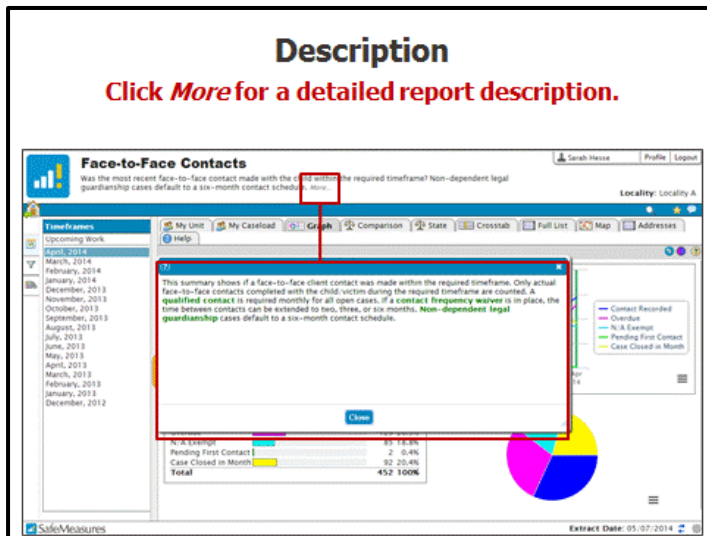
At the top and center of the screen is the title of the report. The text below the title gives a more detailed description of the report data.

Trainer Note: Review the title, the question asked in the report, directly underneath and the cases included. Demonstrate that additional information is available by clicking on 'more'

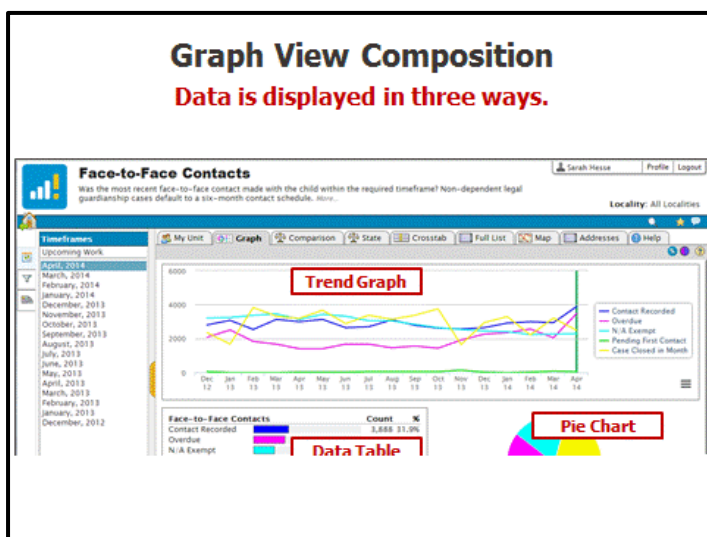
On the bottom right of the screen is the extract date. This tells you when the data was last updated. Information added after the extract

date will not be displayed until the next day.

Slide 26



Slide 27



Graph View

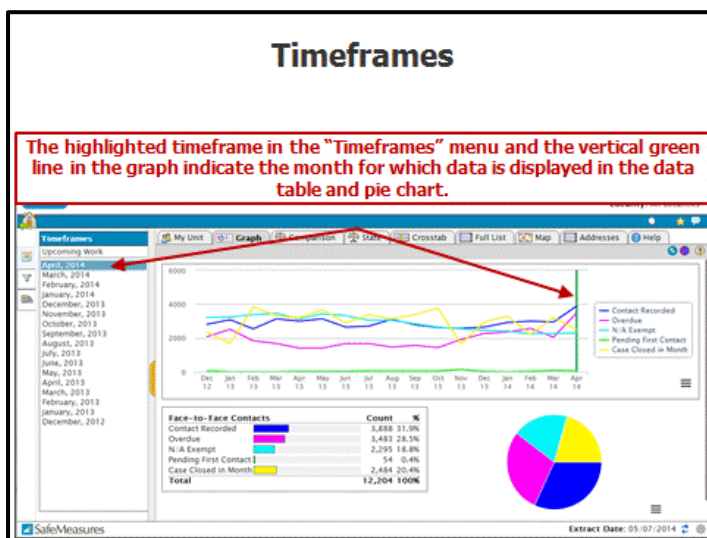
In graph view, the report data are displayed three ways:

- Graph
- Data Table
- Pie Chart

The graph displays data for a given report over time.

The table and pie chart show the data for the selected timeframe. Changing the timeframe will change the data.

Slide 28



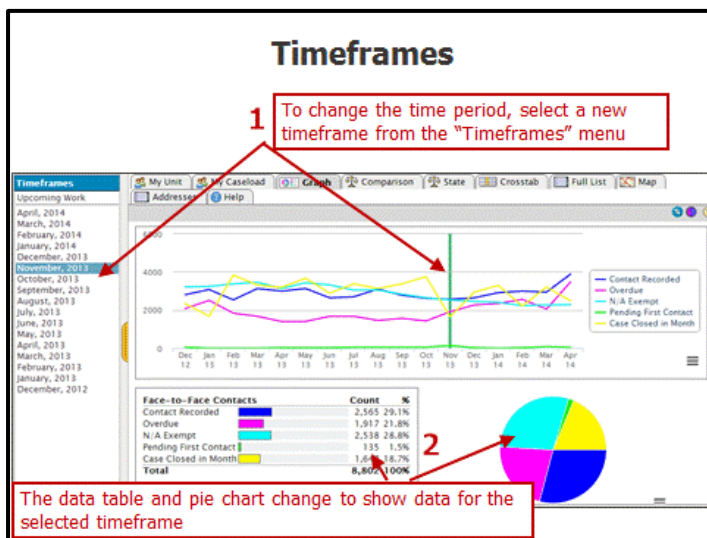
Changing Timeframes

When you open a report, most often the data for the most recently completed time period is displayed.

The vertical green line in the trend graph indicates which timeframe the data table and pie chart is showing.

The trend graph includes complete months. On some reports, there will be an "Open on Date" or "Month to Date" timeframe as well. After the first of a month, switch to one of these to see cases for the current month (not shown). The timeframe matches the "Investigations Included" in the report definition.

Slide 29

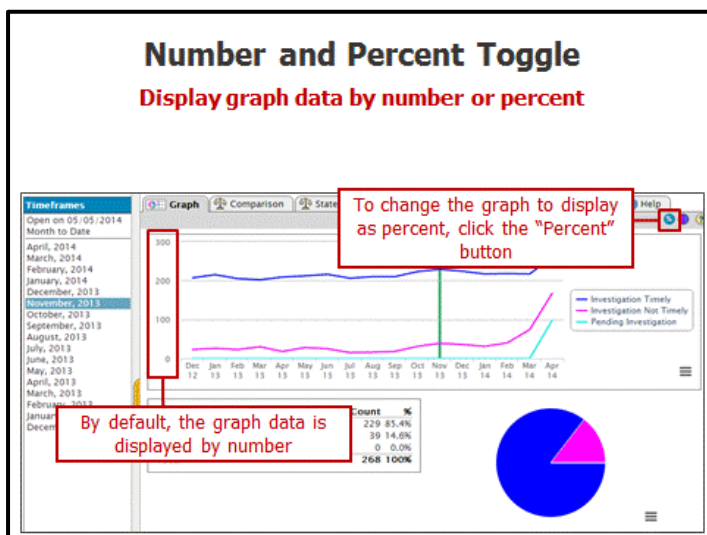


Change Time Period

To change the timeframe, click on a new timeframe from the "Timeframes" menu on the left.

When you change the timeframe, the table and pie chart redraw with the data for the new timeframe.

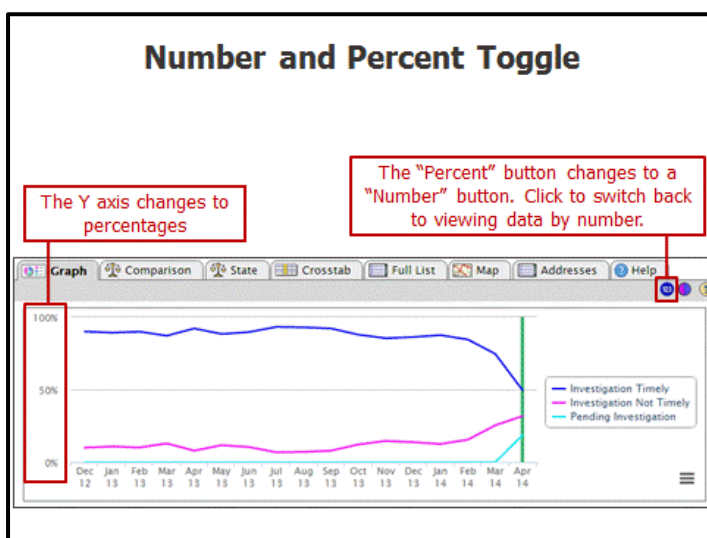
Slide 30



Display graph data by number or percent

Notice that the data in the graph is displayed by number in the Y axis. You can change the graph to display by percentage by clicking the **Percent/Number** toggle.

Slide 31



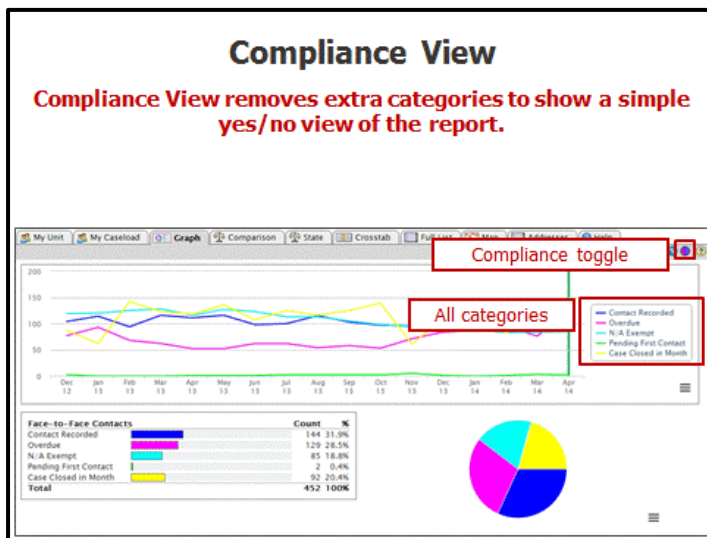
Graph Data Display: Percent

The percentage display gives a truer representation of the actual trend. Since the total number of cases or investigations vary from month to month, the number view can appear to fluctuate widely.

Note that this icon changes to **Number** after you click it.

To change back to displaying the graph data by number, click the **Number** button.

Trainer Note: Click on April 2014 to return to the current month prior to advancing to the next slide.



SafeMeasures will show all cases in a report but not all are used to calculate compliance with a standard.

The compliance view removes extra categories to show a basic yes/no view, e.g., Contact Recorded and Overdue.

Switching to Compliance View

Click the **Compliance** icon (the icon will change to **All Values**).

Non-yes/no categories (e.g., N/A Exempt, Case Closed in Month) are

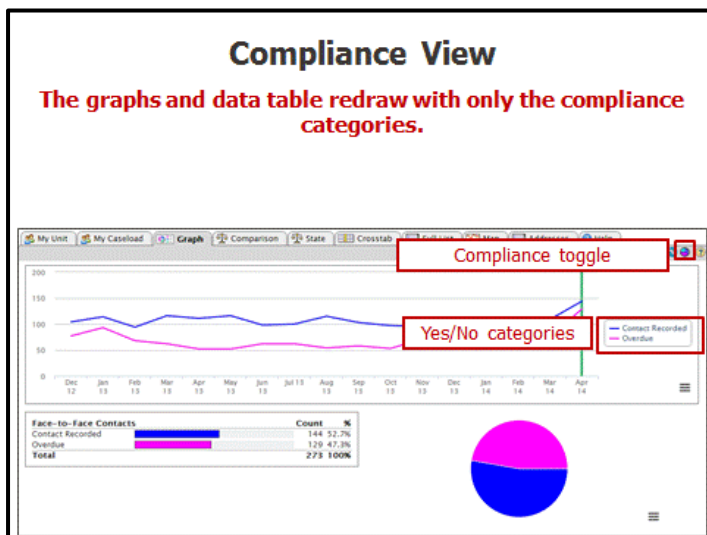
removed, and the graph redraws with just yes/no categories.

Click **All Values** icon to redisplay all categories.

Notes:

The compliance view will not be on all reports.

The compliance view only applies for historic timeframes, not upcoming.



The compliance view removes extra categories to show a basic yes/no view, e.g., Contact Recorded and Overdue.

Switching to Compliance View

Click the **Compliance** icon (the icon will change to **All Values**).

Non-yes/no categories (e.g., N/A Exempt, Case Closed in Month) are removed, and the graph redraws with just yes/no categories.

Click **All Values** icon to redisplay all

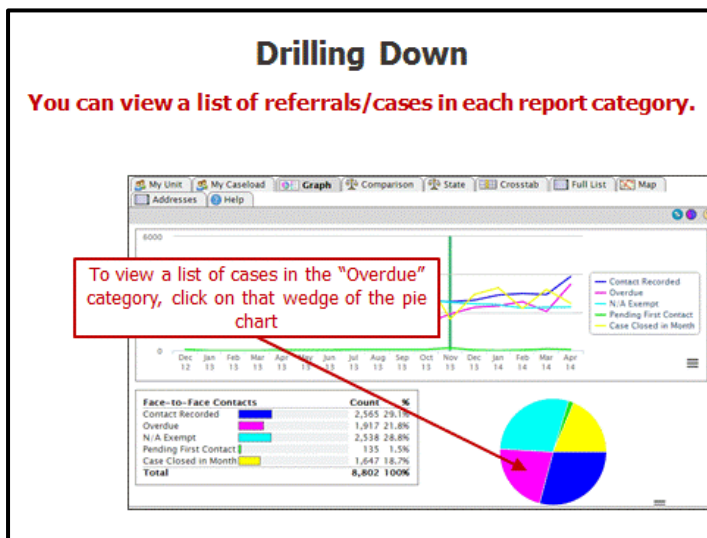
categories.

Notes:

The compliance view will not be on all reports.

The compliance view only applies for historic timeframes, not upcoming.

Slide 34



Drill Down to Cases and Investigations

For each report category, you can view a list of cases/referrals in that category.

If you want to see which cases are in the Overdue category, click on that wedge of the pie chart to view a list of cases in this category. You are always able to see the underlying case information for any report, i.e., which cases are compliant or non-compliant and why.

Trainer Note: Be sure to change back to April 2014.

Slide 35

Drilling Down

From the list, you can open a detailed history for the specific case.

Click the "H" icon to the left of a referral to go to its detailed history page

Supervisor	Staff Member	Case ID	Case Name	Service Component	Contact Schedule	Visit Exception/Case Plan End Date	Exception Status	Last Contact	Contact Status
Caralyk, Karen	Arabitol, Betty	01566090	Linsinger, Rumaldo	ST	Monthly	05/18/2014	No Exception	10/25/2013	Not In Compliance
Caralyk, Karen	Arabitol, Betty	01566090	Linsinger, Rumaldo	ST	Monthly	05/18/2014	No Exception	09/09/2013	Not In Compliance
Caralyk, Karen	Arabitol, Betty	01566090	Linsinger, Rumaldo	ST	Monthly	05/18/2014	No Exception	10/25/2013	Not In Compliance
Caralyk, Karen	Arabitol, Betty	01566090	Linsinger, Rumaldo	ST	Monthly	05/18/2014	No Exception	09/09/2013	Not In Compliance
Caralyk, Karen	Arabitol, Betty	01566090	Linsinger, Rumaldo	ST	Monthly	05/18/2014	No Exception	10/25/2013	Not In Compliance
Caralyk, Karen	Arabitol, Betty	01566090	Linsinger, Rumaldo	ST	Monthly	05/18/2014	No Exception	09/09/2013	Not In Compliance
Caralyk, Karen	Arabitol, Betty	01566090	Linsinger, Rumaldo	ST	Monthly	05/18/2014	No Exception	10/25/2013	Not In Compliance
Caralyk, Karen	Arabitol, Betty	01566090	Linsinger, Rumaldo	ST	Monthly	05/18/2014	No Exception	09/09/2013	Not In Compliance
Caralyk, Karen	Arabitol, Betty	01566090	Linsinger, Rumaldo	ST	Monthly	05/18/2014	No Exception	10/25/2013	Not In Compliance
Caralyk, Karen	Arabitol, Betty	01566090	Linsinger, Rumaldo	ST	Monthly	05/18/2014	No Exception	09/09/2013	Not In Compliance

Drill Down to Cases and Investigations

To see more detail on any investigation or case in a list, click the **History** icon to the left. This will bring up the referral or case history.

Slide 36

Histories

Navigate within the referral history.

The "Details" menu contains links to different parts of the history.
Click a section link to go to that section of the history.
Click the X to close the history tab and return to the previous page.

Referral History: Lobo, Liduvina (01493518)
Data for this specific referral

Locality: Locality A

Details
Top
Referral Contact
Staff Assignment
Clients
Staff Contacts
Worker Assignments (Primary)
Worker Assignments (Secondary)

Referral Contact

First Contact Date	Status	First Completed Date	Participating Client(s)	Worker Name
08/05/2013	Completed	08/05/2013	Lobo, Liduvina	Elk, Anne

Staff Assignment

Start Date	End Date	Worker Name	Title
08/05/2013	08/31/2013	Elk, Anne	Social Worker

NOTICE: The history tables below are shown as examples of the formatting of real SafeMeasures history pages. The data contained does not reflect the data in the training reports.

Clients

Detailed History

The history opens in a new window.

Navigate Within the history

The "Sections" menu contains links to different parts of the history. Click a section link to jump to that section of the history.

Histories pull information from many different screens in CWS/CMS into one concise summary. Information you can find on the history screen includes

the following:

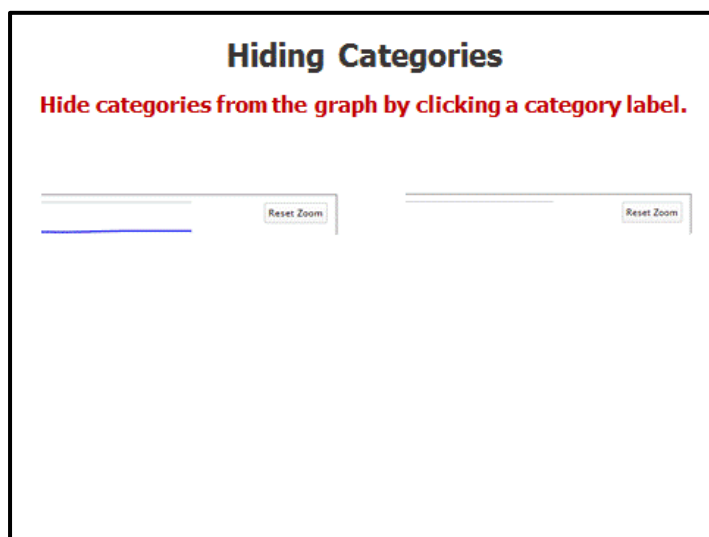
- Address
- Case type
- Case start dates
- Placement information
- Contact information
- Assignment history
- Education information
- And much more

To close the history window, click the “Close” button at the top left.

Trainer Note: Advise staff to make sure the new screen is maximized in the browser window (upper right corner of the browser). They will know if not maximized by the appearance of the screen as a small box and will be unable to see details.

Trainer Note: The histories in the training site are not complete. Advise trainees that their live histories will include much more information than what is shown here.

Slide 37



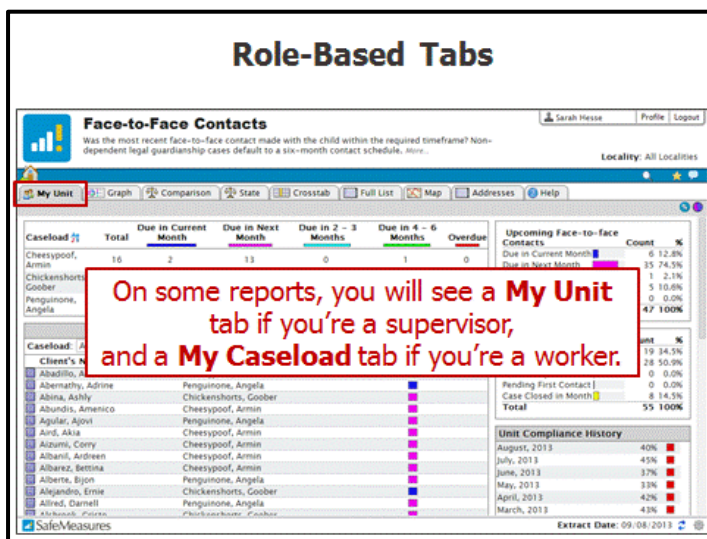
You can hide categories on the trend graph.

- Click on any category label to remove those categories from the trend graph.
- The graph will redraw without that plot line.
- Click the category label again to redisplay it.

Optional: Let's pause and work through some quick exercises as a group.

Trainer: Go to slide 101 and talk through the exercises.

Slide 38



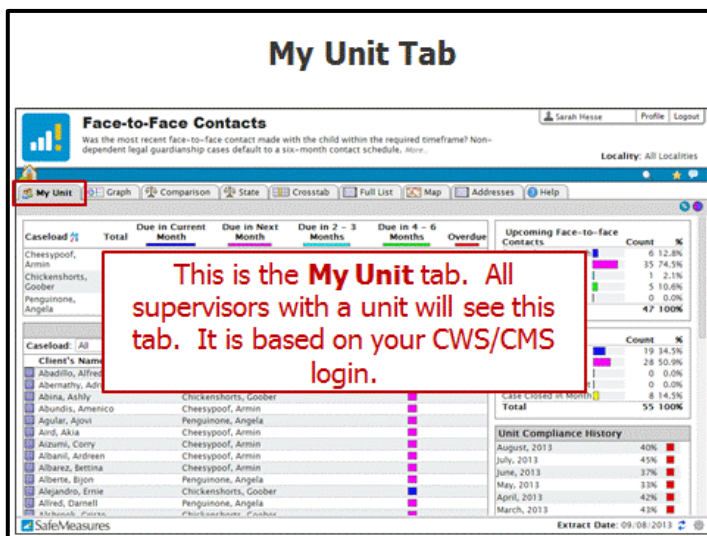
On many reports, you will see two role-based tabs: **My Unit** and **My Caseload**. These tabs contain a series of dashboards that show you the status of your unit or caseload for the report.

These tabs are pre-filtered to your caseload or unit, based on your CWS/CMS login. If you do not have an active caseload or unit, you will not see these tabs.

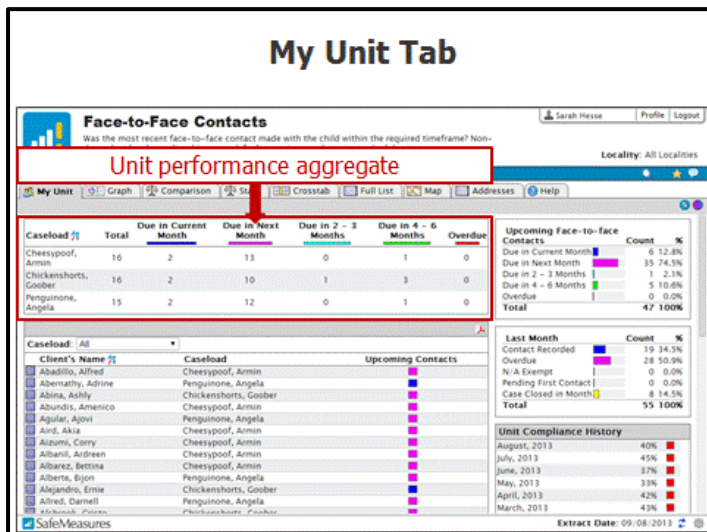
My Unit

The **My Unit** tab is a series of dashboards that show you the status of your unit's caseload for this report.

Slide 39

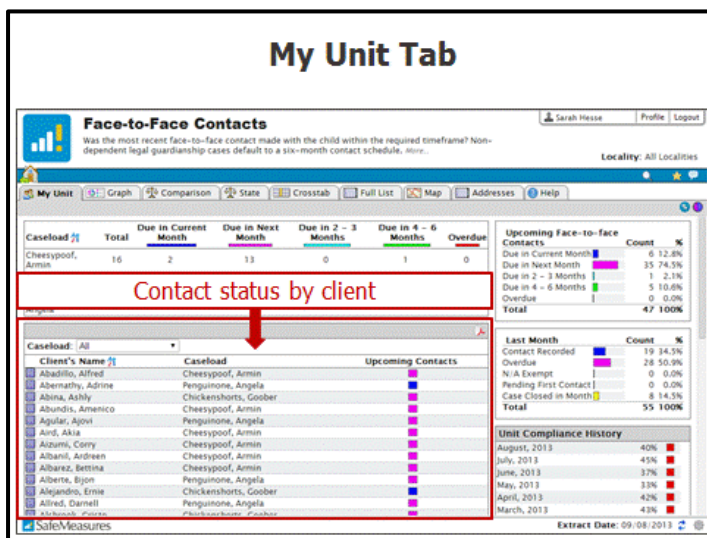


Slide 40



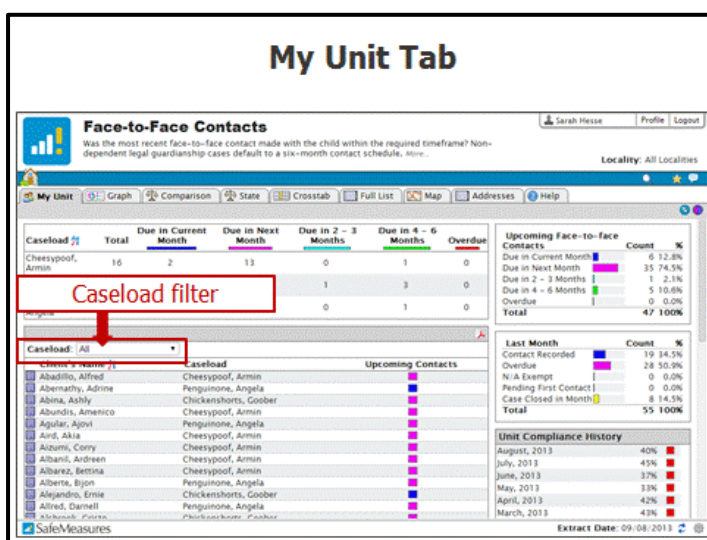
The top panel shows an aggregate of unit performance for this report. You'll see each worker's total caseload count, then counts of cases in each category.

Slide 41



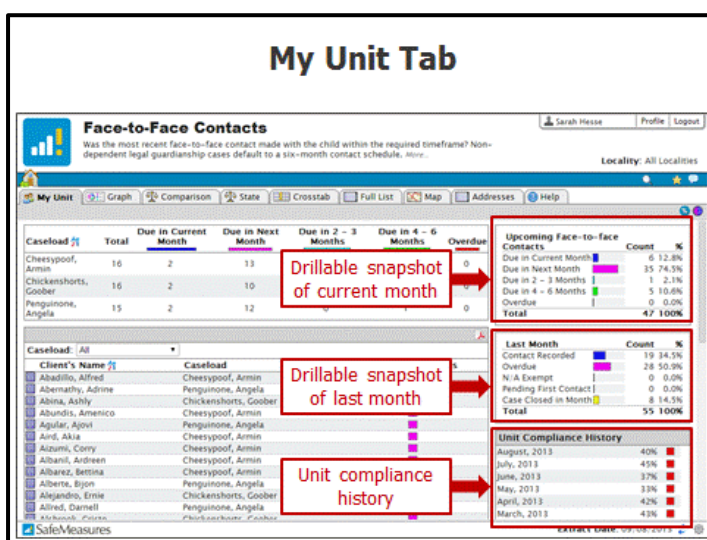
The bottom panel shows the contact status for all clients in your unit. The colors indicate the contact status. Hover over a box to see details.

Slide 42



By default, this dashboard shows clients for all of your workers. Filter to a worker with the drop-down box.

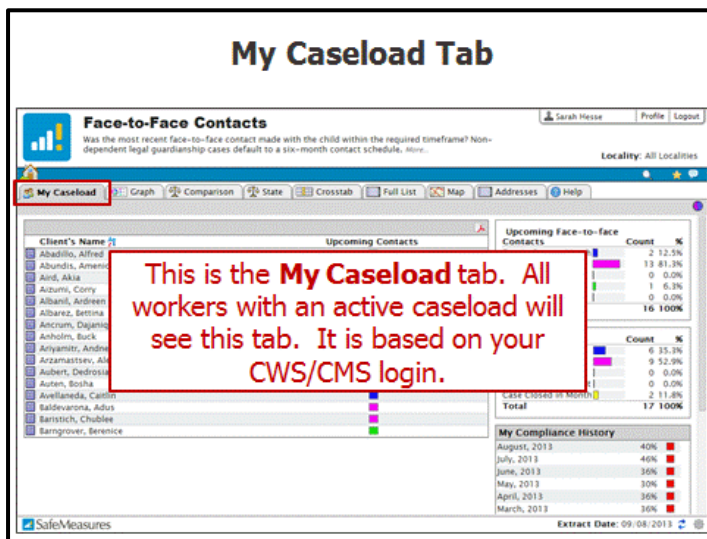
Slide 43



Top: You can see the current month's performance in this dashboard. All categories are drillable (i.e., you can click on a category to see a list of all cases in that category).

Middle: You can see the last month's performance in this dashboard. All categories are drillable (i.e., you can click on a category to see a list of all cases in that category).

Bottom: This dashboard shows your unit's compliance history in past months.



My Caseload

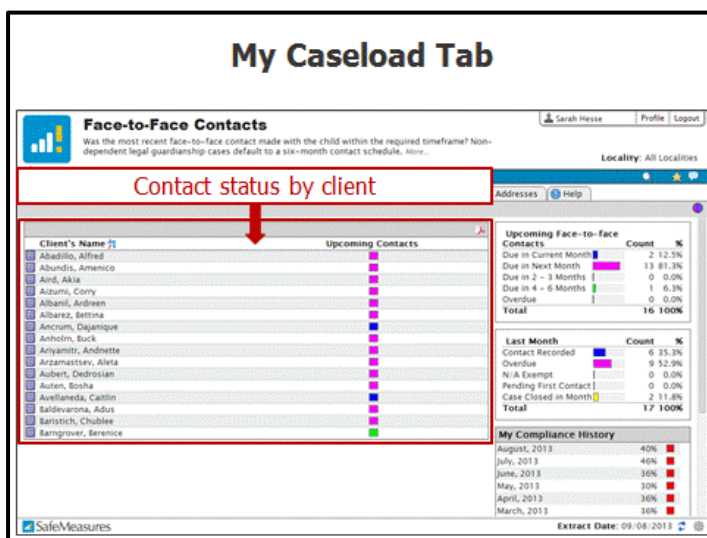
This dashboard is a color-coded, at-a-glance representation of your upcoming work. Each report will have different columns specific to what the report measures. Here are common columns:

Client's Name: This is the name of your client.

[Contact] Due: This column is color-coded based on the status of each client. Hover over each box to see the status.

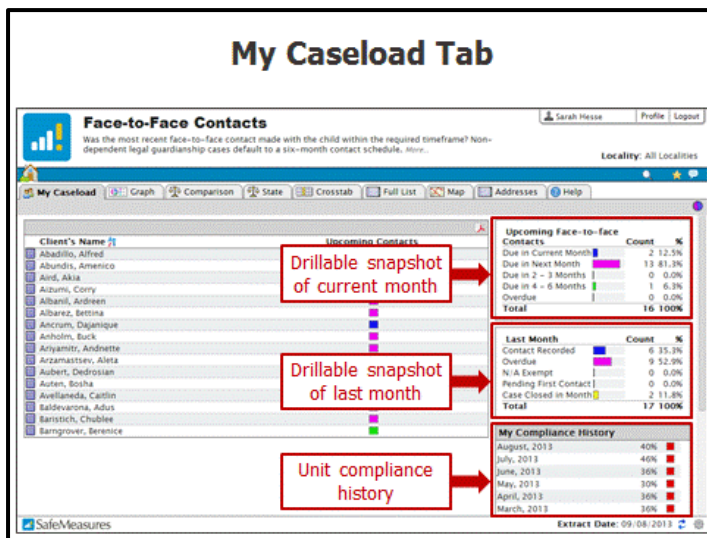
Last [Contact]: This is the date of the last recorded contact or other action (depending on the report).

Due Date: This indicates the due date for the required action.



This panel shows the contact status of all clients in your caseload. The colors indicate the contact status. You can hover over a box to see details.

Slide 46



Top: You can see the current month's performance in this dashboard. All categories are drillable (i.e., you can click on a category to see a list of all cases in that category).

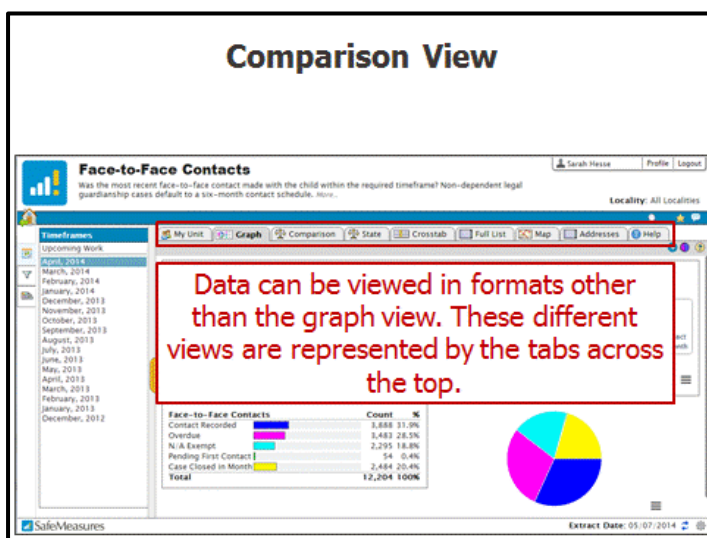
Middle: You can see the last month's performance in this dashboard. All categories are drillable (i.e., you can click on a category to see a list of all cases in that category).

Bottom: This dashboard shows your unit's compliance history in past months.

Slide 47



Slide 48



There are other data views besides the graph view. These other views are indicated by the tabs located above the data display.

Trainer Note: Before moving on to Comparison View, review the title of the report, the question being asked and the cases included. The question in this report is: Was the most recent face-to-face contact made with the child within the required timeframe?

Note that in the Timeframes box, there is an **Upcoming Work** timeframe. This is an upcoming view that shows when the next face-to-face contact with a child is due, as well as clients whose contacts

are currently overdue.

*Trainer Note: Choose the **Upcoming Work** timeframe.*

Slide 49

Comparison View

Office	Due in Current Month	Due in Next Month	Due in 2 - 3 Months	Due in 4 - 6 Months	Overdue	Total
Office 1	39 18.4%	140 66.0%	16 7.5%	13 6.1%	4 1.9%	212
Office 2	25 11.8%	139 65.6%	14 6.6%	23 10.8%	11 5.2%	212
Total	64 15.1%	279 65.8%	30 7.1%	36 8.5%	15 3.5%	424

Comparison level: Office
Data that is being compared: Due in Current Month, Due in Next Month, Due in 2 - 3 Months, Due in 4 - 6 Months, Overdue

We are going to take a closer look at the Comparison view.

To go to comparison view, click on the Comparison tab.

Comparison view breaks the report data down by category and displays it in table form so you can easily make comparison across offices, units, or caseloads.

You have many of the same options that we saw in the graph view:

- Filter (later in training)
- Subset (later in training)
- Percent view (later in training)
- Sort

- Change timeframe

Default Comparison Level

In most instances, the comparison view will default to comparing the data across offices. The level that your display defaults to will be the highest level at which there is more than one option, and you have user rights to access. For example, if your region has only one office, the comparison view would default to comparing across units/supervisors.

Slide 50

Comparison View: Drilling Down

Click an office to see its units.

Office	Due in Current Month	Due in Next Month	Due in 2 - 3 Months	Due in 4 - 6 Months	Overdue	Total
Office 1	39 18.4%	140 66.0%	16 7.5%	13 6.1%	4 1.9%	212
Office 2	25 11.8%	139 65.6%	14 6.6%	23 10.8%	11 5.2%	212
Total	64 15.1%	279 65.8%	30 7.1%	36 8.5%	15 3.5%	424

Unit	Office	Due in Current Month	Due in Next Month	Due in 2 - 3 Months	Due in 4 - 6 Months	Overdue	Total
Unit 1 - Shizzlefutz, Elena	Office 1	6 11.3%	39 73.4%	2 3.8%	3 5.7%	3 5.7%	53
Unit 2 - Wangletfutz, Camilla	Office 1	11 20.8%	34 64.2%	6 11.3%	2 3.8%	0 0.0%	53
Unit 3 - Slangendorf, Monroe	Office 1	12 22.2%	35 64.8%	6 11.1%	1 1.9%	0 0.0%	54
Unit 4 - Harmonica, Ignatio	Office 1	10 19.2%	32 61.5%	2 3.8%	7 13.5%	1 1.9%	52
Total		39 18.4%	140 66.0%	16 7.5%	13 6.1%	4 1.9%	212

Drill Down

You can control the level of comparison. You can either expand your comparison or you can narrow your comparison.

To narrow your comparison, you will drill down.

To narrow your comparison to all units within one particular office, click on the name of the office. This will display a comparison of all units in that office.

Slide 51

Comparison View: Drilling Down

Drill down to narrow the comparison level.

Display: Office = Office 1

Unit #	Office	Due in Current Month	Due in Next Month
Unit 1 - Slizzlefutz, Elena	Office 1	6 11.3%	39 73.6%
Unit 2 - Wanglefluck, Carmella	Office 1	11 20.8%	34 64.2%
Unit 3 - Slangendorf, Monroe	Office 1	12 22.2%	35 64.8%
Unit 4 - Harmonica, Ignatio	Office 1	10 19.2%	32 61.5%
Total		39 18.4%	140 66.0%

Display: Office = Office 1 = Unit = Unit 4 = Harmonica, Ignatio

Caseload #	Office	Unit	Due in Current Month	Due in Next Month	Due in 2 - 3 Months	Due in 4 - 6 Months	Overdue	Total
Bystander, Millicent	Office 1	Unit 4	4 23.5%	11 64.7%	1 5.9%	1 5.9%	0 0.0%	17
Gagahertz, Harris	Office 1	Unit 4	3 16.7%	11 61.1%	1 5.6%	2 11.1%	1 5.6%	18
Toothrotter, Germaine	Office 1	Unit 4	3 17.6%	10 58.8%	0 0.0%	4 23.5%	0 0.0%	17
Total			10 19.2%	32 61.5%	2 3.8%	7 13.5%	1 1.9%	52

To further narrow your comparison to all workers within one particular unit, click on the name of the unit. This will display a comparison of all workers in the selected unit.

You can drill further by clicking on a worker's name (not shown). You can then see that worker's caseload. You can also access histories from that list.

Slide 52

Comparison View: Drilling Up

Drill up through comparison levels by clicking the **Up** arrow.

Display: Office = Office 1 = Unit = Unit 4 = Harmonica, Ignatio

Caseload #	Office	Unit	Due in Current Month	Due in Next Month	Due in 2 - 3 Months	Due in 4 - 6 Months	Overdue	Total
Bystander, Millicent	Office 1	Unit 4	4 23.5%	11 64.7%	1 5.9%	1 5.9%	0 0.0%	17
Gagahertz, Harris	Office 1	Unit 4	3 16.7%	11 61.1%	1 5.6%	2 11.1%	1 5.6%	18
Toothrotter, Germaine	Office 1	Unit 4	3 17.6%	10 58.8%	0 0.0%	4 23.5%	0 0.0%	17
Total			10 19.2%	32 61.5%	2 3.8%	7 13.5%	1 1.9%	52

Drill Up

To drill back up, click the **Up** icon until you get to the desired level.

Slide 53

Comparison View: Application

Use the drop-down box for quick links to comparison levels.
Example: Select All Units to see all units.

Display: All Units

Unit #	Office	Due in Current Month	Due in Next Month	Due in 2 - 3 Months	Due in 4 - 6 Months	Overdue	Total
Unit 1 - Slizzlefutz, Elena	Office 1	6 11.3%	39 73.6%	2 3.8%	3 5.7%	3 5.7%	53
Unit 2 - Wanglefluck, Carmella	Office 1	11 20.8%	34 64.2%	6 11.3%	2 3.8%	0 0.0%	53
Unit 3 - Slangendorf, Monroe	Office 1	12 22.2%	35 64.8%	6 11.1%	1 1.9%	0 0.0%	54
Unit 4 - Harmonica, Ignatio	Office 1	10 19.2%	32 61.5%	2 3.8%	7 13.5%	1 1.9%	52
Unit 5 - Goosofast, Portia	Office 2	10 19.6%	33 64.7%	0 0.0%	8 15.7%	0 0.0%	51
Unit 6 - Umblaut, Harris	Office 2	8 15.1%	34 64.2%	2 3.8%	7 13.2%	2 3.8%	53
Unit 7 - Crookenspeid, Sigmund	Office 2	5 9.3%	38 70.4%	3 5.6%	4 7.4%	4 7.4%	54
Unit 8 - Caralyk, Karen	Office 2	2 3.7%	34 63.0%	9 16.7%	4 7.4%	5 9.3%	54
Total		64 15.1%	279 65.8%	30 7.1%	36 8.5%	15 3.5%	424

Show All

Just as you can narrow your comparison, you can expand your comparison.

Click the "Show All" drop-box, then select an option:

- All Localities
- All Offices
- All Units
- All Caseloads

If you select "Unit," the resulting comparison will show all units in all

offices (shown).

If you select "All Caseload," the resulting comparison will show all caseloads in all units in all offices (not shown).

Slide 54

Comparison View: Application

Answer specific questions.
Example: What units have the most overdue contacts?

1 Select "All Units"

2 Sort the "Overdue" column

Unit	Office	Due in Current Month	Due in Previous Month	Overdue	Total
Unit 8 - Caralyk, Karen	Office 2	2	3.7%	5	9.3%
Unit 7 - Groomsesspell, Sigmund	Office 2	5	9.3%	38	70.4%
Unit 1 - Slizlefutz, Elena	Office 1	6	11.3%	39	73.6%
Unit 6 - Umblaut, Harris	Office 2	8	15.1%	34	64.2%
Unit 4 - Harmonica, Ignatio	Office 1	10	19.2%	32	61.5%
Unit 2 - Wangleflick, Carmella	Office 1	11	20.8%	24	64.2%
Unit 3 - Slangendorf, Monroe	Office 1	12	22.2%	35	64.8%
Unit 5 - Goestofast, Portia	Office 2	10	19.6%	33	64.7%
Total		64	15.1%	279	65.8%

Once you have navigated to your desired comparison level, you can begin to make comparisons.

For example, you may want to compare overdue contacts among all units.

- Click **Show All** and select **Units**
- Sort the **Overdue** column
- Look at the numbers in that column. The units with the most overdue contacts will be at the top of the list.

Optional: Let's pause and go through some exercises as a group.

Trainer: Go to Slide 108 for the comparison exercises.

Slide 55

Crosstab View

Slide 56

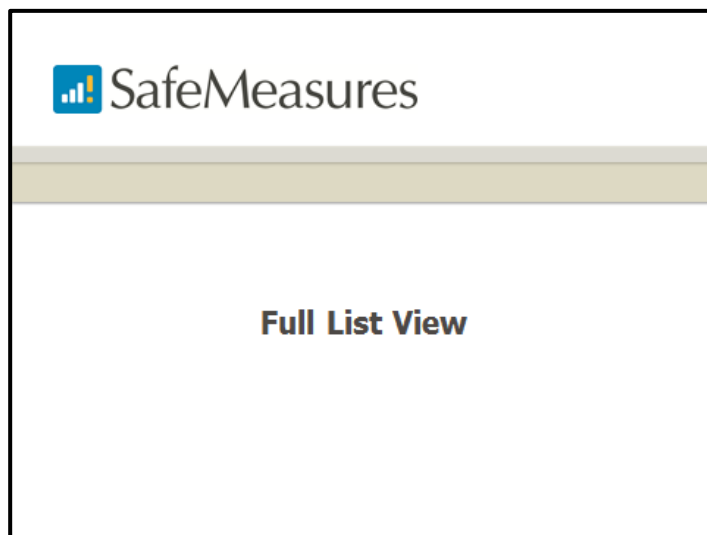
Crosstab View

Gender	Due in Next Month	Due in 2 - 3 Months	Due in 4 - 6 Months	Overdue	Total
Female	36 16.7%	137 63.4%	15 6.9%	20 9.3%	216 100.0%
Male	28 11.5%	142 68.3%	15 7.2%	7 3.4%	208 100.0%
Unknown	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Total	64 15.1%	279 65.8%	30 7.1%	27 6.5%	424 100.0%

The Crosstab View allows you to compare report data against another variable such as race, gender, case plan, etc. These variables are usually the same as the subset options.

- Choose a variable from the drop-down box.
- Toggle between percent and number view; remove categories not related to compliance; export to Excel; or view help.

Slide 57



Slide 58

Full List View

The full list contains all cases on a report.

Supervisor	Staff Member	Case ID	Case Name	Service Component	Contact Schedule	Visit Exception/Case Plan End Date	Exception Status	Last Contact	Contact Status
Caralyk, Karen	Arabitol, Betty	01902709	Korotkiy, Rubalt	FR	Monthly	10/16/2014	No Exception	05/02/2014	In Compliance
Caralyk, Karen	Arabitol, Betty	01211564	Losee, Coy	ER	Monthly	10/02/2014	No Exception	05/07/2014	In Compliance
Caralyk, Karen	Arabitol, Betty	01804042	Rubin, Burlina	FM	Every 6 Months	04/29/2013	Voluntary Guardianship	02/27/2014	In Compliance
Caralyk, Karen	Arabitol, Betty	01406811	Loring, Nikolas	PP	Monthly	10/02/2014	No Exception	05/05/2014	In Compliance
Caralyk, Karen	Arabitol, Betty	01039388	Burnby, Tahiana	FR	Every 3 Months	06/05/2014	Valid Exception	04/07/2014	In Compliance
Caralyk, Karen	Arabitol, Betty	01162311	Taddi, Haston	FM	Monthly	08/31/2014	No Exception	05/01/2014	In Compliance
Caralyk, Karen	Arabitol, Betty	01777304	Line, Conrick	FR	Monthly	08/26/2014	No Exception	05/05/2014	In Compliance
Caralyk, Karen	Arabitol, Betty	01601771	Lomayaktema, Camie	PP	Every 6 Months				

The **Full List** is similar to the list you see when you drill into a category, but the full list view displays all cases in a report, regardless of how they're categorized.

Common information includes:

- Assigned supervisor/worker
- Client information (ID, name, etc.)
- Service component
- Last action date (contact, case plan, etc.)

- Any other basic info that supports why the case is in the report
- Each column is sortable.
- Each item in the list has a link to the client's history page (the **H** icon).
- Navigate through pages in the bottom right. You can also see the total number of records in the list.

Slide 59

Full List View: Customizing Lists
Customize what columns you see on a report.

Check the columns you want on the list

Open the List Editor

Close

Close the List Editor

You can hide columns on any list view. SafeMeasures will remember your preference when you open this list.

- To show/hide columns, click the **Show/Hide Columns** icon.
- Check or uncheck a box to hide/show that column.
- Click **Close** to return to the list.

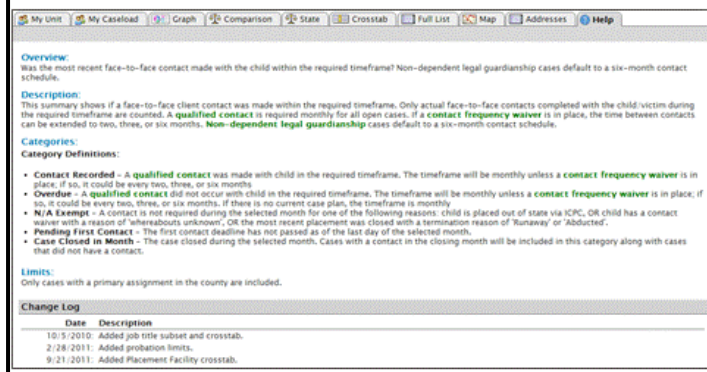
Slide 60

SafeMeasures
CA SMS Training Manual

Help View and Search

Help View Tab

Report help is on its own tab.

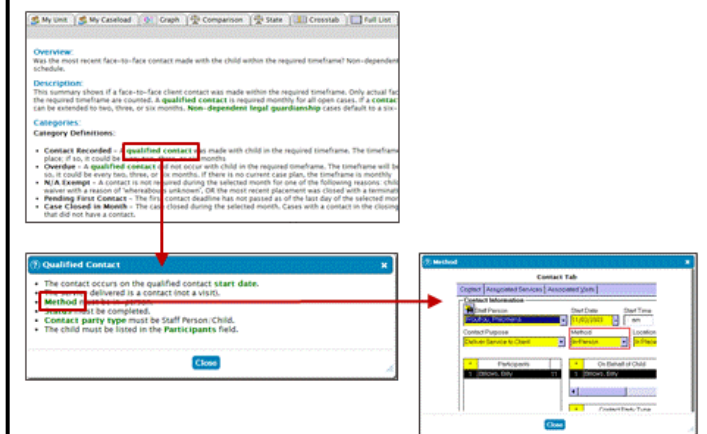


The Help tab contains all help for a report:

- Description
- Overview
- Limits
- Change log

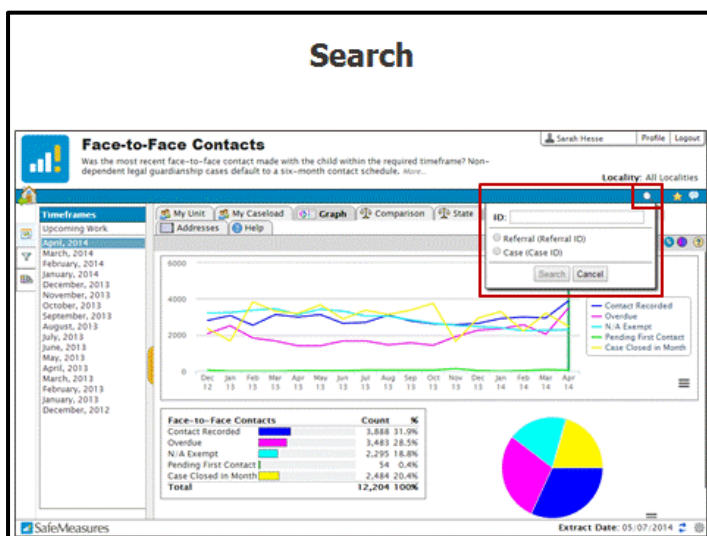
Always check Help first if you don't understand a report!

Help View Pop-Ups



Any green link will contain a pop-up with further detail, often with screenshots of where data comes from in CWS/CMS.

Search



The **Search** icon (magnifying glass) is on most pages in SafeMeasures. It can be found in the blue bar on the right. You can search for the following:

- Referral ID
- Case ID

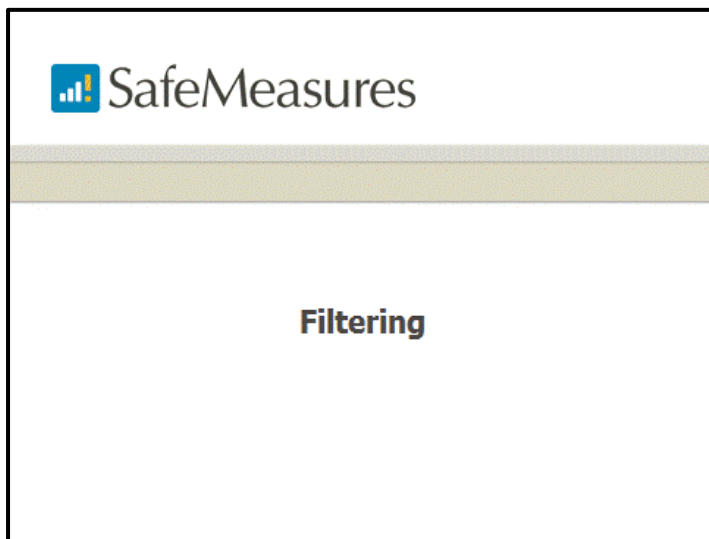
Note: The training site only includes two search options. Your live site will have others.

Searching for a referral or case ID:

- Enter an ID.
- Select the ID type (referral or case).

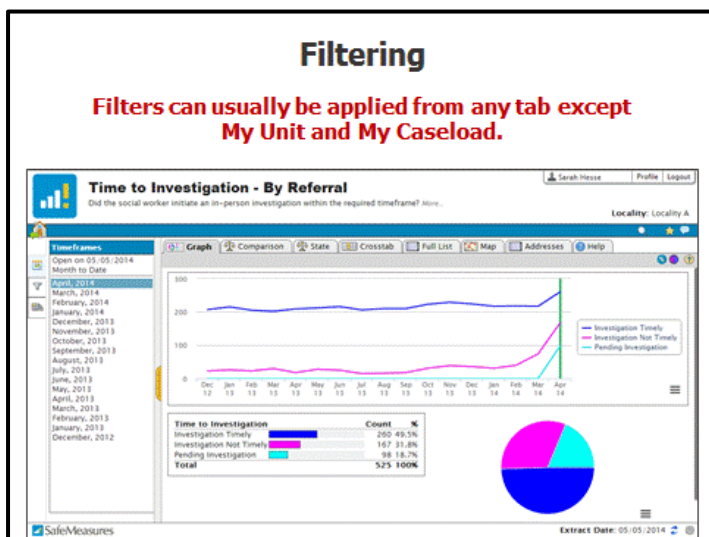
- Click **Search**.
- The history opens in a new tab or window.

Slide 64



Trainer note: Switch to the Time to Investigation by Referral report before advancing slides.

Slide 65



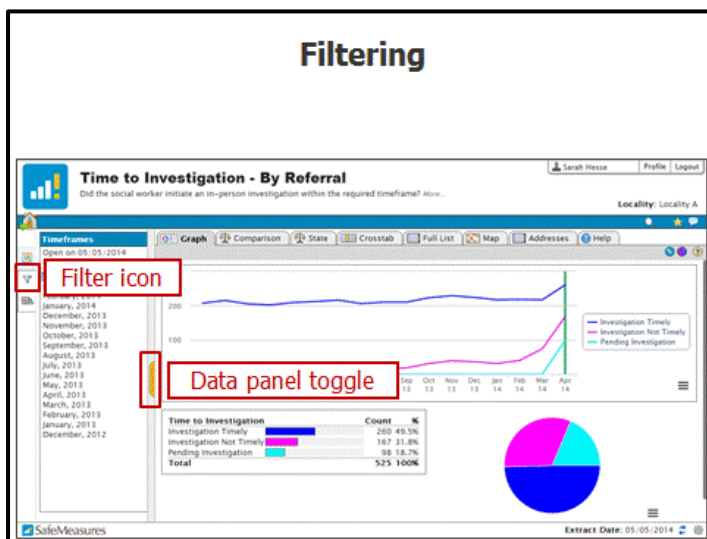
When you open a measure, it displays data for your entire region (or your entire office, depending upon where you are located).

Most often, you will want to be more specific than this. For example, you want to see how your own unit is doing with this report. This is where filtering comes in. By applying a filter, you can exclude data you aren't interested in, and display only the data that is relevant to you.

Filters are possibly the most useful tool in SafeMeasures to help workers

and supervisors get at the information they need most for their day-to-day work.

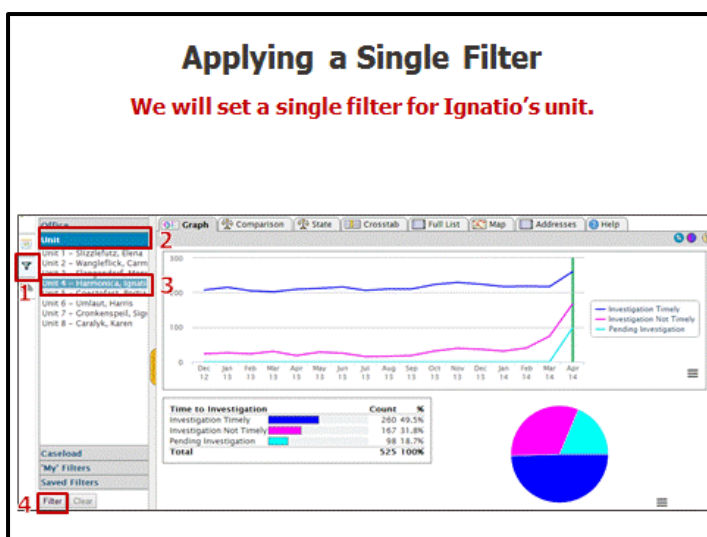
Slide 66



The yellow tab toggles between showing/hiding the timeframes and data panel. The filter icon is located in the data panel.

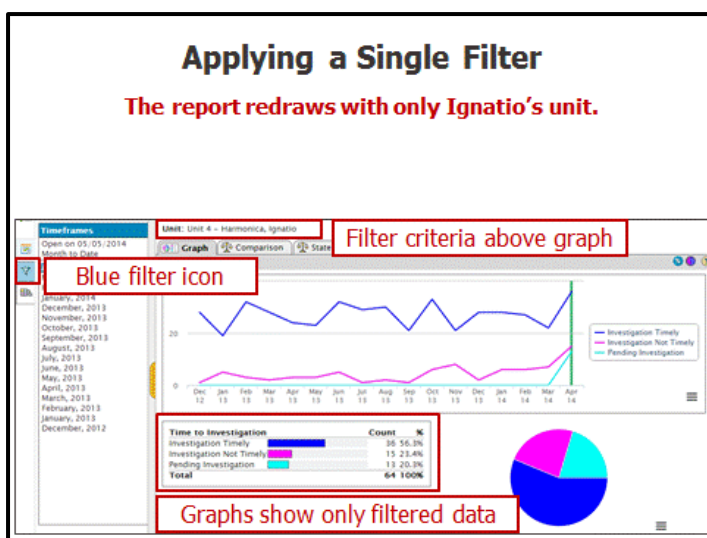
Trainer Note: Demonstrate hiding and showing the data panel.

Slide 67



- Click the Filter icon to display a list of filter categories
- Click a category to see its options
- Click the desired option (Ignatio)
- Click Filter

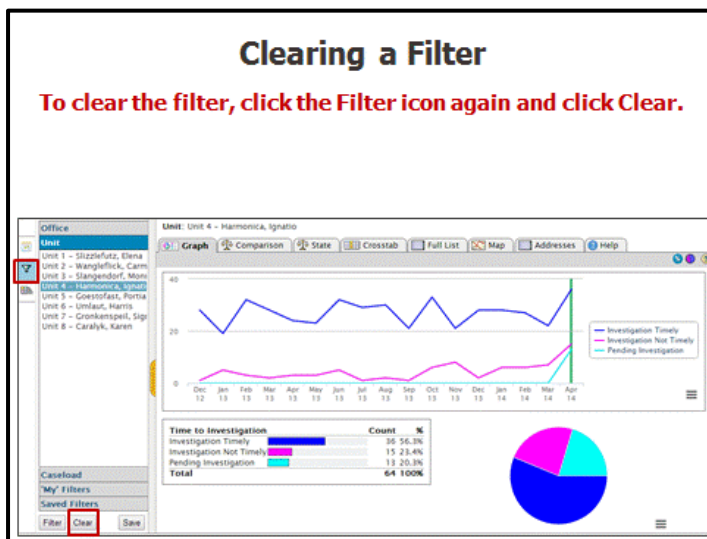
Slide 68



There are multiple visual cues that indicate a filter has been applied to the report.

- The filter icon is blue.
- The filter criteria are displayed above the graph.
- The graphs and data table will redraw with only the filtered data.

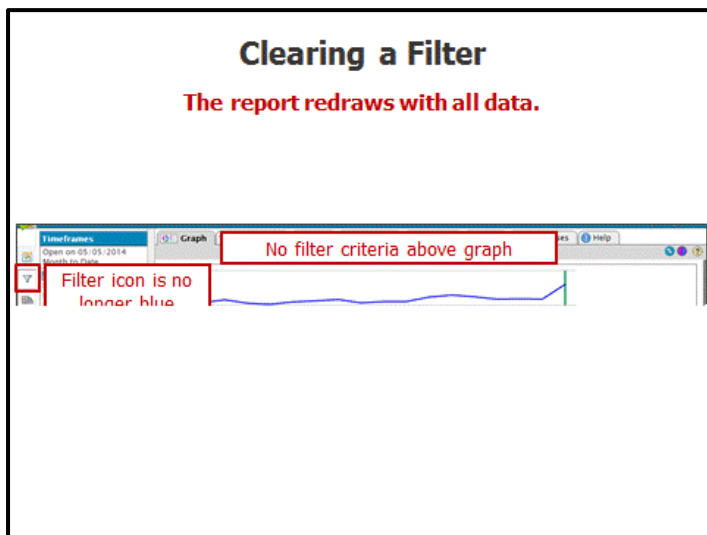
Slide 69



To return to all data:

- Click the filter icon
- Click Clear

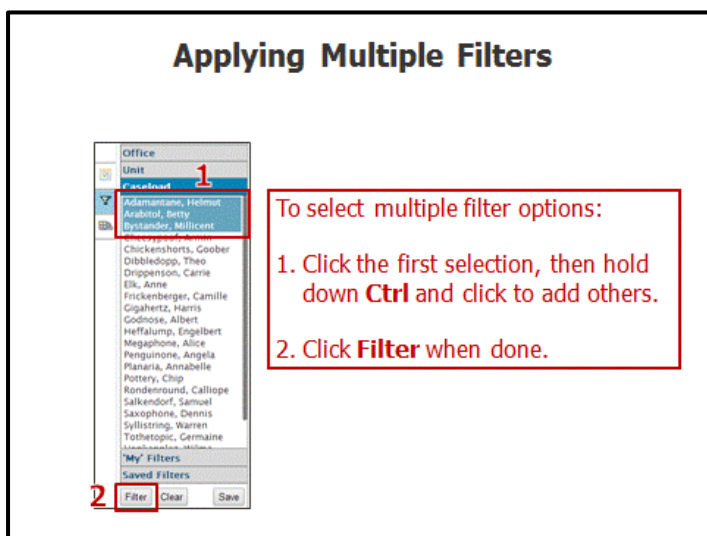
Slide 70



There are multiple visual cues that indicate a filter has been cleared from the report.

- The filter icon is not blue.
- The filter criteria are no longer displayed above the graph.
- The graphs and data table will redraw with all data.

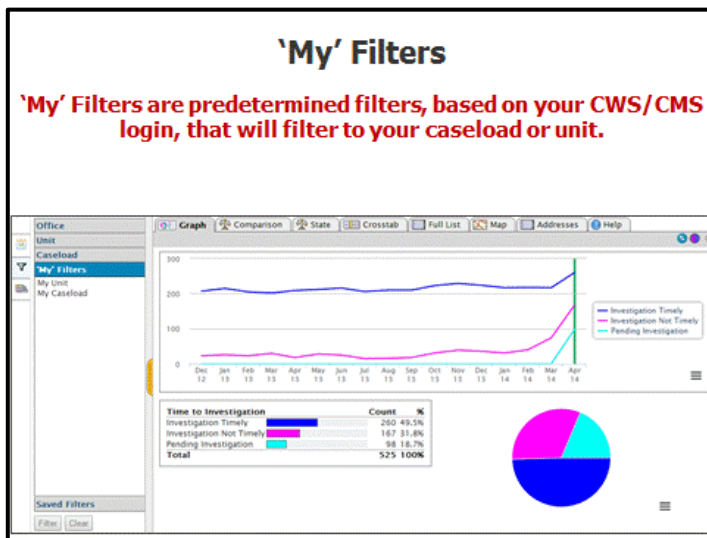
Slide 71



Applying multiple filters:

- Click the filter icon and:
- Click the first selection. Hold down the **Ctrl** key as you select other options.
- Click Filter.

Slide 72



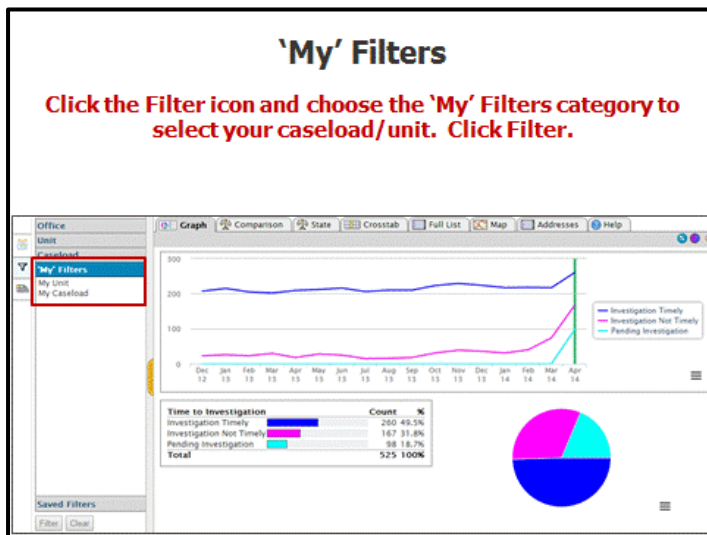
There are other, easier ways to filter a report.

Trainer Note: Most workers and supervisors will only need to master applying the 'My' Filters.

SafeMeasures has built-in filters based on your CWS/CMS login that will show just your caseload or just your unit.

These filters are only available if SafeMeasures knows your CWS/CMS login.

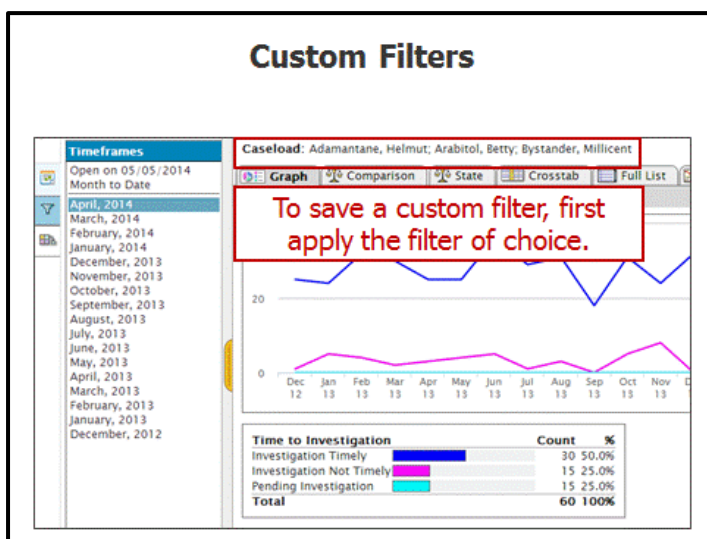
Slide 73



If you have an active caseload, you will see **My Caseload**. If you are a supervisor, you will see **My Unit**. Supervisors may also see **My Caseload** if they have a caseload.

Apply either the My Unit or My Caseload filter just like any other filter. The graphs and data table will redraw with just your unit or caseload (not shown).

Slide 74



You can also save a custom filter for easy access to multiple units or caseloads. This can be helpful for workers who are covering a coworker's caseload, or for a supervisor who wants to look at just a portion of her unit's caseloads.

Start by applying a caseload filter for Helmut, Betty, and Millicent.

Slide 75

Custom Filters

Caseload: Adamantane, Helmut; Arabitol, Betty; Bystander, Millicent

1. Click **Save**

2. Name the filter

3. Click **Save** in the name pop-up

Time to Investigation	Count	%
Investigation Timely	30	50.0%
Investigation Not Timely	15	25.0%
Pending Investigation	15	25.0%
Total	60	100%

Click the filter icon again. You will now see a Save option.

- Click Save.
- Name the filter.
- Click Save in the Name pop-up.

Slide 76

Drilling Into a Custom Filtered Category

Apply the custom filter and drill into the Investigation Not Timely category to see these 3 workers' non-compliant investigations.

Supervisor	Staff Member	Referral ID	Referral Name	Referral Date	Response Priority	Contact Worker	First Contact	Time (Days)	Time (Working Days)	Category Field
Geostofast, Portia	Adamantane, Helmut	01292287	Saber, Norma	04/23/2014	10 Day	Adamantane, Helmut	04/30/2014	16	12	Not in Compliance
Geostofast, Portia	Adamantane, Helmut	01635693	Dylin, Ruby	04/24/2014	Immediate	Adamantane, Helmut				Not in Compliance
Geostofast, Portia	Adamantane, Helmut	01294724	Umhucum, Lilliana	04/15/2014	10 Day	Adamantane, Helmut				Not in Compliance
Geostofast, Portia	Adamantane, Helmut	01171944	Ruskin, Nera	04/24/2014	10 Day	Adamantane, Helmut				Not in Compliance
Geostofast, Portia	Adamantane, Helmut	01227716	Edmonster, Lindsey	04/11/2014	10 Day	Adamantane, Helmut				Not in Compliance
Geostofast, Portia	Adamantane, Helmut	01328465	Edeinan, Roosevelt	04/17/2014	10 Day	Adamantane, Helmut				Not in Compliance
Geostofast, Portia	Adamantane, Helmut	01331989	Roper, Belal	04/18/2014	10 Day	Adamantane, Helmut				Not in Compliance
Geostofast, Portia	Adamantane, Helmut	01641419	Ovual, Linh	04/21/2014	10 Day	Adamantane, Helmut				Not in Compliance
Harmonica, Ignatio	Bystander, Millicent	01396034	Egus, Deyone	04/23/2014	10 Day	Bystander, Millicent				Not in Compliance
Harmonica, Ignatio	Bystander, Millicent	01308034	Dummetts, Abdurahaman	04/22/2014	10 Day	Bystander, Millicent				Not in Compliance
Harmonica, Ignatio	Bystander, Millicent	01423272	Abbadie, Norma	04/13/2014	10 Day	Bystander, Millicent	04/25/2014	13	10	Not in Compliance
Harmonica, Ignatio	Bystander, Millicent	01540493	Oouangpemp, Rustin	04/18/2014	10 Day	Bystander, Millicent				Not in Compliance

With your custom filter applied in the graph view, you can click on a pie wedge to generate a filtered list view. Any filter you apply in graph view will stay in effect when you generate a list view by drilling down.

Step 1: Click on a wedge of the pie chart (*Trainer Note: Not shown, but demonstrate*).

Step 2: The list view will load, displaying only the referrals in the selected category for the filtered caseloads.

You can further drill down to a detailed referral history by clicking on the **H** icon.

Slide 77

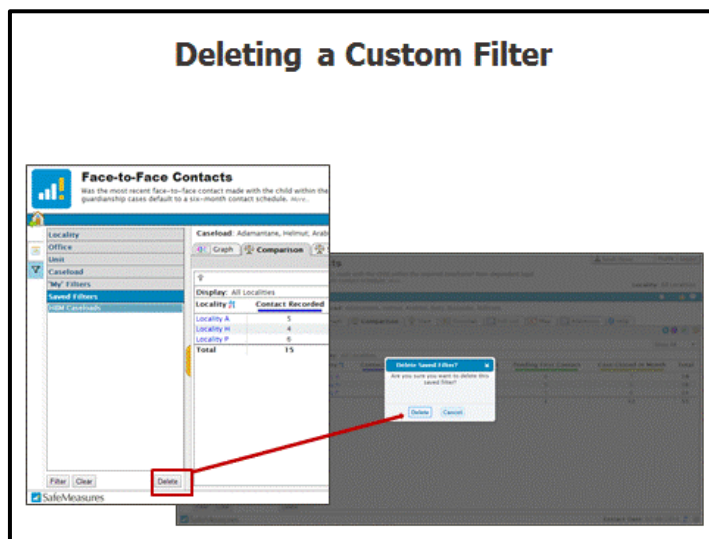
Custom Filters

Saved filters can be applied like any other filter

Time to Investigation	Count	%
Investigation Timely	30	50.0%
Investigation Not Timely	15	25.0%
Pending Investigation	15	25.0%
Total	60	100%

All saved filters are stored in the **Saved Filters** category. These can be applied and cleared just like any other filter.

Slide 78

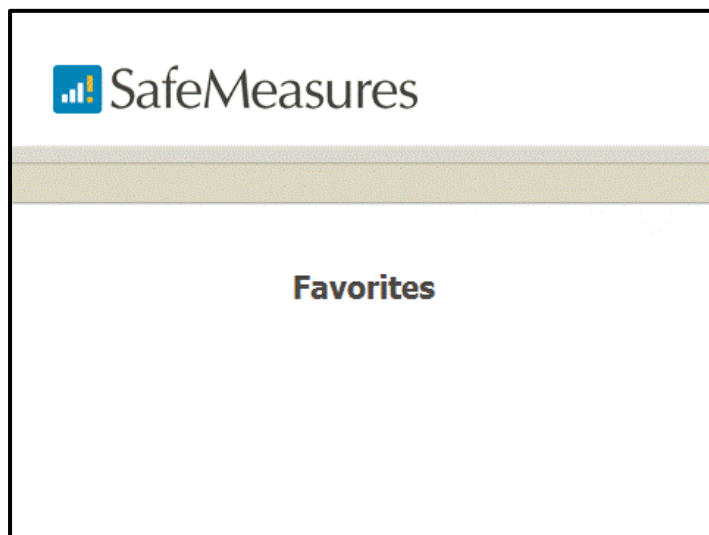


Delete a saved filter by highlighting it and clicking **Delete**. Click **Delete** to permanently delete the saved filter. Click **Cancel** to keep the filter.

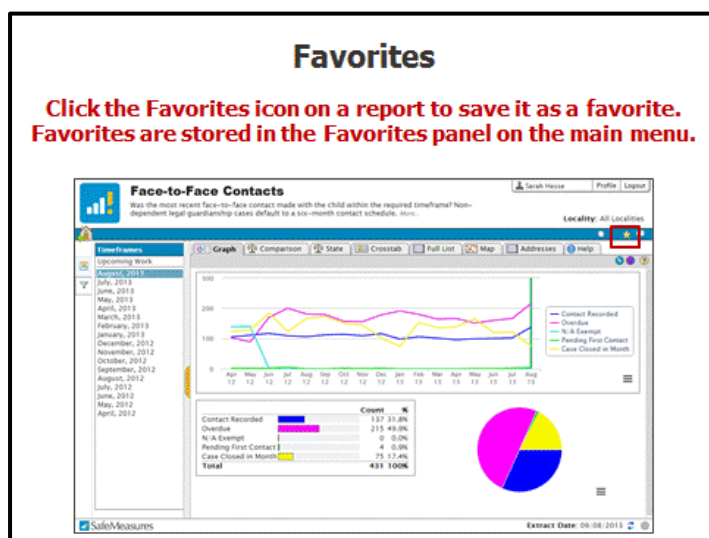
Optional: Let's pause and go through some exercises as a group.

Trainer: Go to Slide 116 for the comparison exercises.

Slide 79



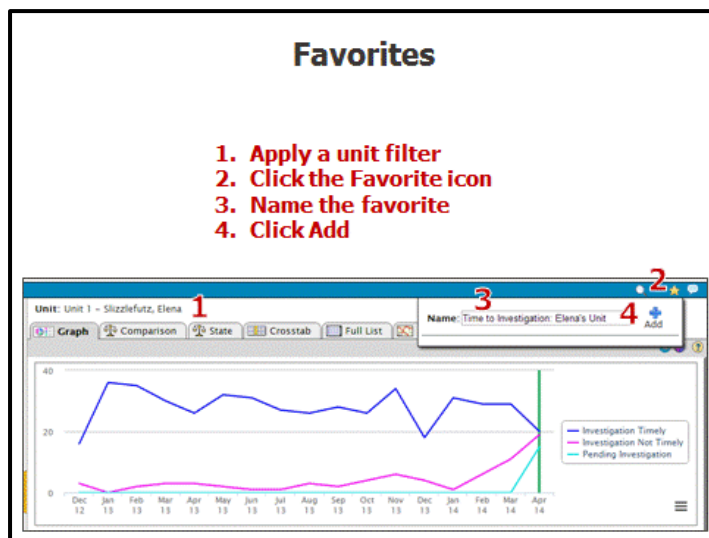
Slide 80



The Favorites icon (the star) can be found on almost every page of SafeMeasures.

- Saving a report as a favorite is like bookmarking a website.
- Favorites are an ideal way to quickly access the reports you use most often.
- Favorites also allow you launch a specific report view (e.g., multiple caseloads) without having to apply a filter every time you open the report.

Slide 81

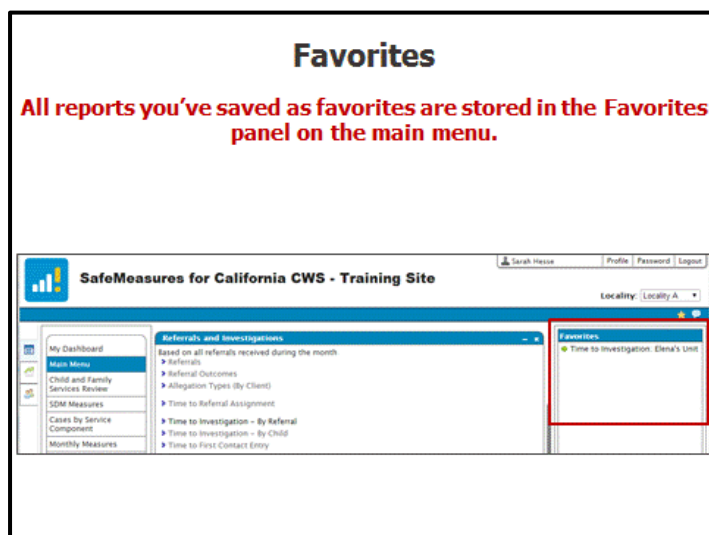


You can set more than one favorite for the same report. For example, you can set two favorites on this report for two separate offices.

Example: Setting this report as a favorite for two different units.

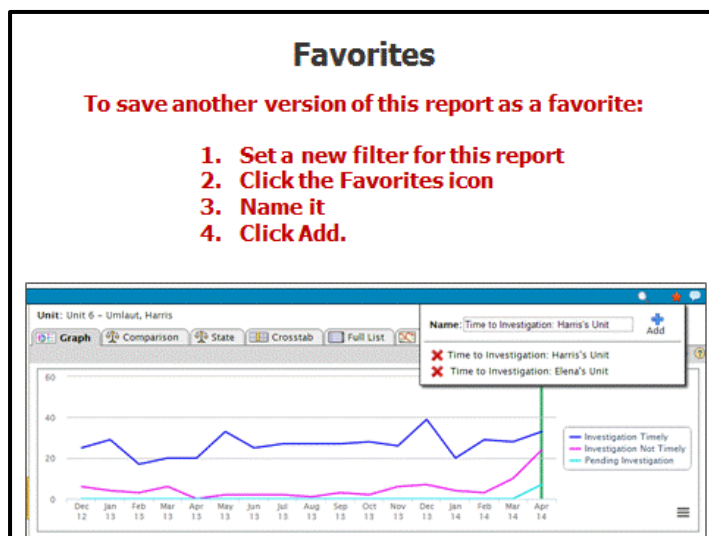
- Apply a unit filter
- Click the Favorite icon
- Type in a name for the report
- Click Add

Slide 82



All favorites are stored in the Favorites panel on the main menu.

Slide 83



You can save a report with any combination of filters and/or subsets.

Trainer Note: To demonstrate, you will have to clear the first filter before setting the new filter.

- Set the new filter
- Click the **Favorite** icon
- Give the favorite a new, unique name
- Click **Add**.

Favorites

Both favorited versions of the report are stored in the Favorites panel on the main menu.

Deleting a Favorite

Click the Favorites icon from any report to display all favorites. Click the red X next to the favorite you want to delete.

You can delete a favorite for any report from any other report in SafeMeasures. That is, no matter what report you are in when you open the Favorites list, you will see a list of all favorites, not just favorited versions of the current report.

To delete a favorite, click the **X** next to the favorite.

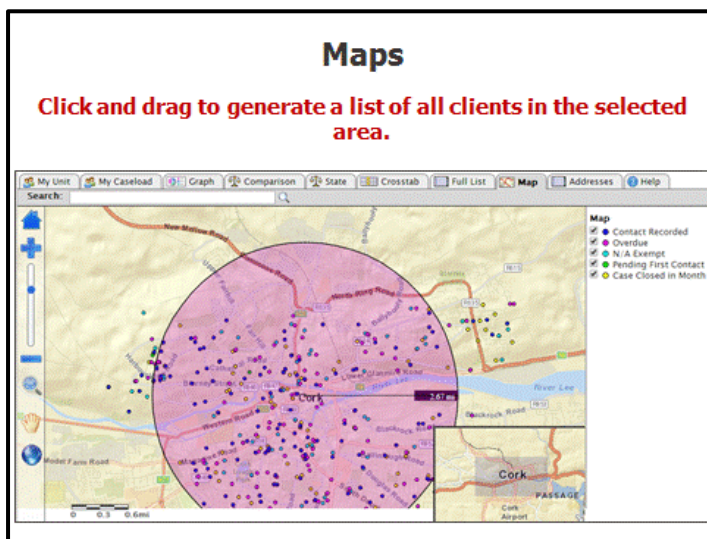
Maps

The location of each client is plotted on the map, color-coded by their category.

Some reports will feature a map view, which plots the location of all clients in the report. They will be color-coded in different ways depending on the report, but generally they will be plotted based on how they are categorized in the report.

Navigation works just like other popular Internet-based maps. (Demonstrate panning and zooming)

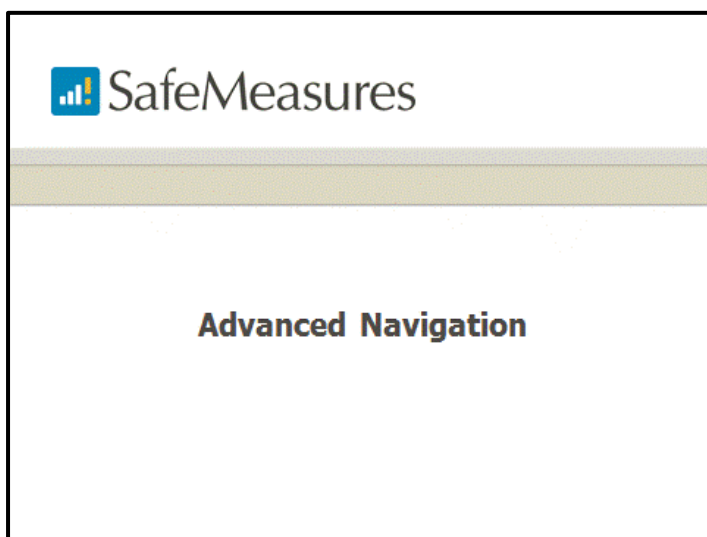
Slide 87



Use the list generator (the list icon) to create a “rip and run” list. Activate the list generator and click and drag to draw a circle around the cases you want to see in list form. A new tab will open with a list of the clients, along with pertinent information.

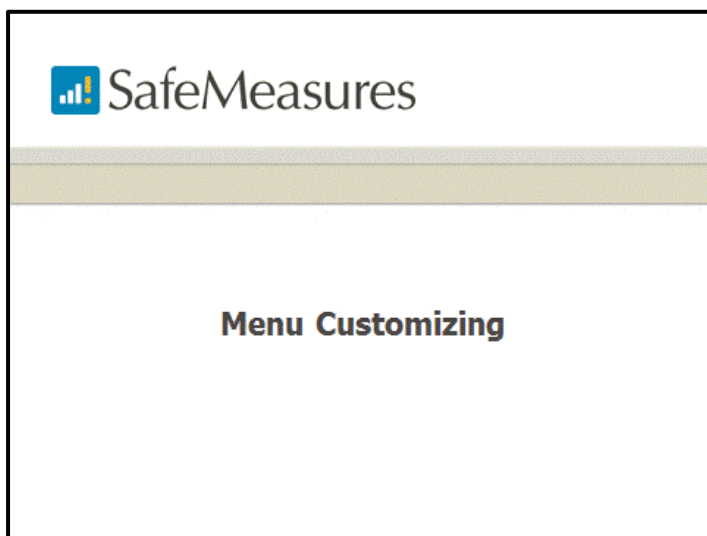
Trainer Note: Demonstrate the click and drag, but note that the list might not be fully functional. This is in development on the training site. It is still worth mentioning and demoing, since the feature is available in their live system.

Slide 88



If time allows and you have a computer-savvy group, here are a few extra features that will help users customize their SafeMeasures menus and report views.

Slide 89



Slide 90

Menu Customizing

Measure category expanded

Measure categories collapsed

Click — to collapse category box; click + to expand it.

Click X to remove the section from the menu view.

Collapse/Expand Feature

Each category of reports appears in its own individual box within the main menu. Each category box can be collapsed and expanded.

Clicking on the minus sign will collapse the category box. Clicking the plus sign will expand the category box.

Slide 91

Menu Customizing

Click and drag the blue title bar to move a section up or down on the page.

Section Rearranging

You can customize the order of the sections on your menu. Click and drag the blue title bar to move it up or down.

Slide 92

Menu Customizing

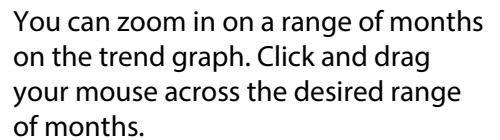
Click the Edit icon, check the sections you want to display, and close the Edit box.

Menu Editor

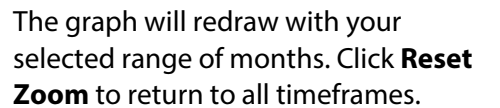
Click the menu Edit icon to choose which sections to display.

Click Reset to return the menu to the default (all sections, original order).

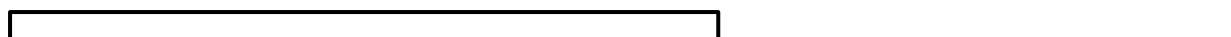
Slide 93

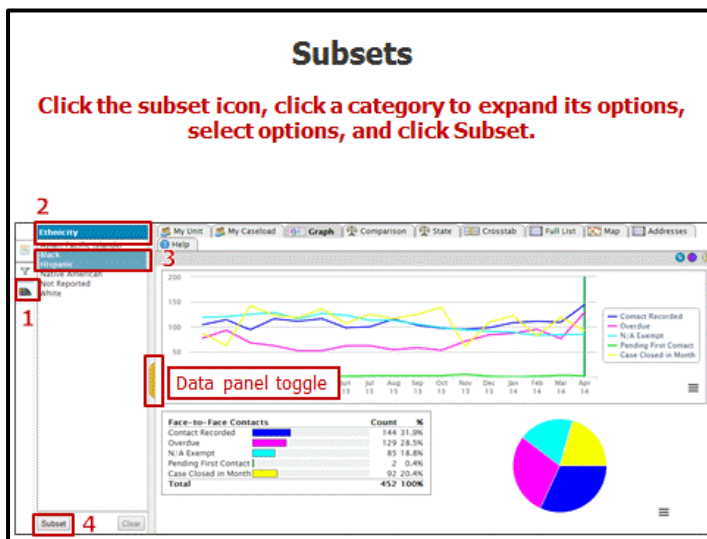


Slide 94



Slide 95





Subsets let you view sub-populations of the report cohort (e.g., gender or race).

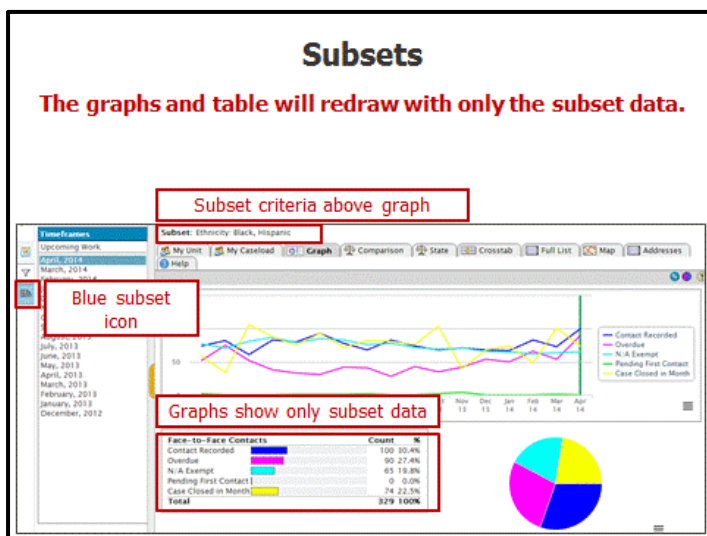
Applying a Subset

Note: If the Data Panel is not visible, click the yellow tab to display it.

- Click the **Subset** icon.
- Click a subset category.
- Select the values you wish to view. Use the Ctrl key to select multiple values in a category.

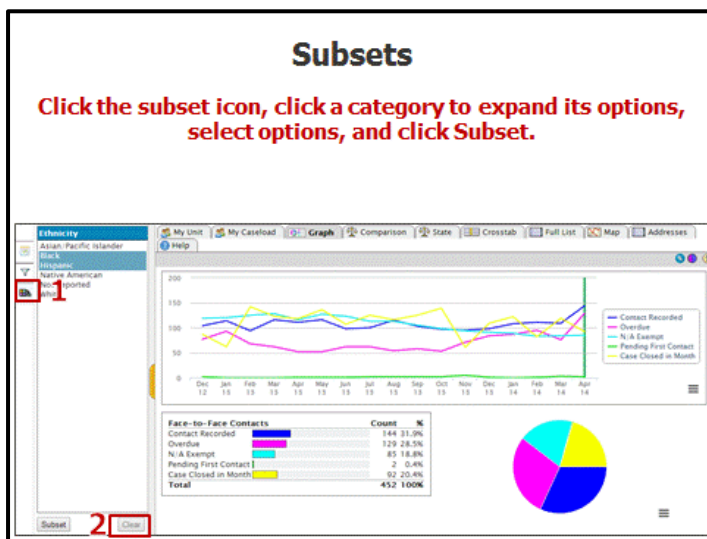
NOTE: You can select options from multiple categories.

- Once you have selected values from whichever categories (e.g., Hispanic clients with FR service components), click **Subset**.



After a subset is applied, the subset icon turns blue to indicate that there is an active subset on the report. The subset criteria will be displayed above the report.

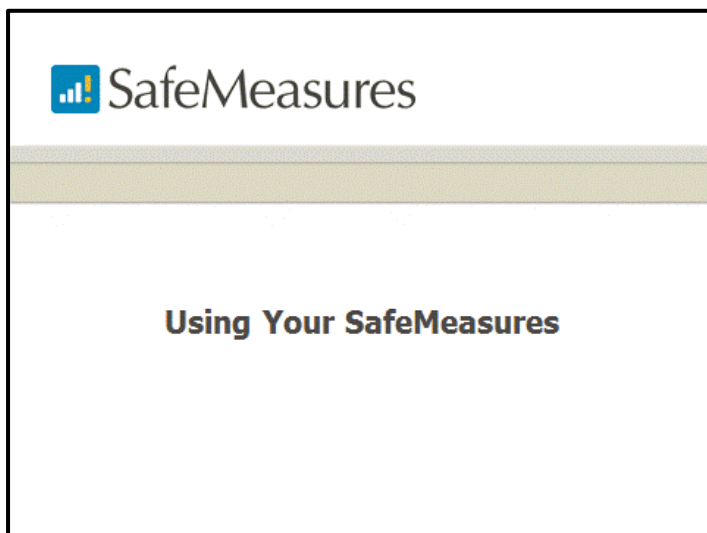
Slide 98



Clearing a Subset (not shown)

- Click the **Subset** icon.
- Click **Clear**. Doing so will clear **all** selected subset criteria.

Slide 99



Now that you've had some practice with the demo version of SafeMeasures, you will login to your jurisdiction's SafeMeasures, where you will see your own data.

For the next hour or so, you will be presented with questions and you will have the opportunity to use SafeMeasures in a way that is directly useful to you.

Slide 100

Using Your SafeMeasures

<https://app.safemeasures.org/ca>

Login to Your SafeMeasures

<https://app.safemeasures.org/ca>

To login to your SafeMeasures:


- Enter your CWS/CMS username
- Enter your password
- Click the "Login" button

If this is the first time you have logged in to your SafeMeasures account, enter the default password of "password." You will then be taken to a change password screen where you will choose your own SafeMeasures

password.

Passwords must be six characters or more, and they are case sensitive.


Slide 101



SafeMeasures

Application Exercises

Slide 102



SafeMeasures

Basic Measure Exercises

Please use the measure "Time to Investigation - By Referral" for these exercises.

Slide 103

Basic Measure Exercises

How is the county doing with time to investigation for the current timeframe (Open on ...)?

- Look at the data table and compare the "Timely" and "Not Timely" numbers

Basic Measure Exercises

Which month has the highest percentage of investigations that are not timely?

- Click back to the last completed month (April 2014)
- Change to view data in percent
- In the trend graph, identify which month corresponds to the highest point on the "Investigation Not Timely" line

Basic Measure Exercises

In April 2013, what percent of investigations were in compliance?

- Change timeframe to April 2013
- Look at "Investigation Timely" percentage in data table
- *QUICK METHOD: If you hover your mouse pointer over a point on the graph, a popup will appear that contains the number and percent for the time period*

Is this better or worse than the current timeframe?

- Make a note of the percentage from last year
- Change timeframe to current month
- Look at "Investigation Timely" percentage in data table

Basic Measure Exercises

In the Month to Date timeframe, which referrals are not timely?

- Make sure you have the Month to Date timeframe selected.
- Click the "Investigation Not Timely" wedge of the pie chart to drill down to the list view of referrals in this category.

Basic Measure Exercises

For January 2014, which referral has the greatest number of days until the first contact?

- Change the timeframe to January 2014
- Go to the list view and sort descending by "Time (Days)"
- The referral with the greatest number of days to first contact will be at the top of the list.

Basic Measure Exercises

Look at the detailed history for this investigation

- Click the **H** (history) icon to the left of the referral
- Look over the details of the referral history



Comparison Exercises

Comparison Exercises

Which worker is carrying the most cases?

- Click "Show All" and select "Caseload"
- Sort descending by "Total"
- The worker with the most cases appears at the top of the list

Comparison Exercises

Which worker has the best performance for contacts made?

- Keep all caseloads showing
- Click the "Percent" button to display data by percent
- Sort descending by "Contact Recorded"
- The worker(s) with the greatest percentage of recorded contacts appears at the top of the list

Comparison Exercises

Which unit has the lowest percentage of recorded contacts?

- Keep the data display in percent
- Click "Show All" and select "Units"
- Make sure the list is sorted in ascending order by "Contacts Recorded"
- The unit with the lowest percentage of recorded contacts appears at the top of the list

Comparison Exercises

Within this unit, identify the worker with the lowest number of recorded contacts.

- Click on the unit name with the lowest contact percentage
- Click the "Number" button
- Sort ascending by "Contacts Recorded"
- The worker with the lowest number of recorded contacts appears at the top of the list

Comparison Exercises

For the worker with the fewest recorded contacts, which contacts were missed?

- Click on the name of the worker with the fewest recorded contacts
- Find those cases in his/her caseload that have "0" in the "Contact Recorded" column

Comparison Exercises

Pick one of these cases, and identify when the child was last contacted.

- Click on the name of a case with no recorded contact
- In the case history, go to the section titled "Staff Contacts with This Client"
- The last contact with this child appears at the top of this section

Comparison Exercises

How would you find the allegations on this child's original referral?

- You would use the search feature at the top of the case history to find the original referral

Trainer: Return to Slide 53.



Filtering Exercises

Please use the measure "Time to Investigation – By Referral" for these exercises.

Trainer Note: Ask everyone to clear all filters prior to beginning exercises.

Filtering Exercises

Create a filter that includes one unit

How is that unit doing this month?

- Look at the current month in the data table and on the trend graph

Filtering Exercises

Create a filter that includes more than one unit

How are those units doing this month?

- Look at the current month in the data table and on the trend graph

Filtering Exercises

Save the current multi-unit filter

- Click on the "Filter" tab
- Click "Save"
- Give your filter a descriptive name
- Click "Save"

Filtering Exercises

Keep this saved multi-unit filter in place

Is the percentage of non-compliant investigations higher this month or last month?

- Click the "Percent" button
- For the "Investigation Not Timely" category, compare the points for this month and last month on the trend graph

Filtering Exercises

Clear your saved filter

- Click on the "Filter" tab
- Click "Clear"

Filtering Exercises

Reload your saved filter

- Click on the "Filter" tab
- Select "Saved Filters" from the drop-down menu
- Select your saved filter from the list
- Click "Filter"

Filtering Exercises

Delete your saved filter

- Click on the "Filter" tab
- Select your saved filter from the saved filters list
- Click "Delete"