

SafeMeasures® Advanced Navigation Quick Reference Guide

Description and Cohort:

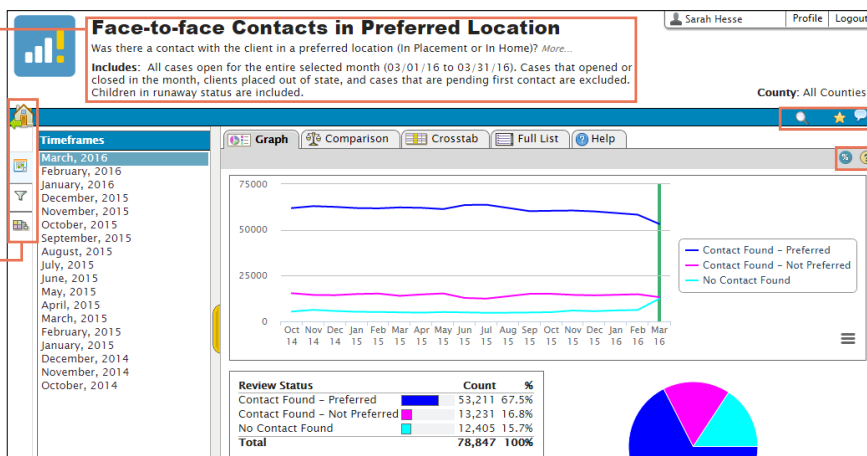
Explains what the report measures: metric, population, and timeframe.

Home: Click to return to the main menu.

Timeframes: Click to display available timeframes.

Filter: Click to apply, clear, or save filters for this report.

Subset: Click to apply or clear subsets for this report.



- Search:** Enter a case or client ID to access a history page.
- Favorites:** Add or view bookmarked reports.
- Help desk:** Click to email the SM help desk.
- Percent Toggle:** Click to change Y axis to percentage.
- Compliance Toggle:** Click to remove non-compliance categories (not shown).
- Help:** Click for tab help (e.g., category or list column help).

History Pages pull important CWS/CMS data onto one screen, including: case/client info (name, ID, DOB, address); referral info (dates, allegations, dispositions); contact details (location, worker, participants); case plan info (dates, goals, participants); placement info (address, start/end dates); SDM assessments; medical and dental info; and assigned worker.

Access: Click the **History** icon -OR- click the **Search** icon on any page in SM to open the search box. Enter the ID -> select the ID type -> click Search.

Search icon

ID: _____

Referral (Referral ID)

Case (Case ID)

Client (Client ID)

Case Who's Who (Case ID)

Referral Who's Who (Referral ID)

Search Cancel

Favorites are like bookmarked websites. Save commonly used reports to access with one click from the Favorites panel on the main menu.

Save a favorite: Open the report -> apply any filters or subsets -> click the Favorite icon (yellow star if not saved as a favorite; red if already saved). Rename the favorite if desired -> click Add.

Save a multiple, customized favorite: Save multiple, customized versions of the same report (helpful when reviewing one report for different offices or units). Apply filter -> click the Favorite icon -> rename -> click Add. Return to the report -> clear the filter -> apply the new filter. Click the Favorite icon -> rename it -> click Add. Repeat as needed.

Subsets limit what type of case data is shown (e.g., by gender or case type).

Apply/clear a subset: Click the Subset icon -> select a category (e.g., Gender) -> select an item (e.g., Female) -> click the Subset button. To clear, click the Subset icon and click the Clear button.

Apply multiple subsets: Click the Subset icon -> select the category -> select the first item (e.g., Female) -> press the Ctrl key -> select the next item (e.g., Unknown). Repeat as needed. Click Subset.

Note: You can apply subsets from different categories. Either select all options before clicking the Subset button, or apply one subset and then open the Subset menu again to apply another. However, clicking Clear will clear all subsets, not just the one most recently applied.

Comparisons provide a breakdown of report data by the assigned entity (worker, unit, office, region, etc.—usually the same variables as the report's filter options).

View: Open a report and click on the Comparison tab. The default comparison level is the top level (i.e., if viewing statewide data, the first comparison level would be all counties).

Drill in: To view the next level of comparison (e.g., if at county level, all regions in the county), click on a county. The reports refreshes to show all regions. To view the next level of comparison (offices in a region), click on a region. Depending on your county's rules, you can drill down to a worker's caseload.

Navigate up or down: To move up a level, click the arrow icon above the far left column. Alternately, click the drop-down menu above the far right column. Select an option to quickly jump to that comparison level.

Crosstabs provide a breakdown of report category counts for the selected variable (usually the same variables as the subset options).

To view: Click on the Crosstab tab. To change the variable, click the drop-down menu above the far left column and click on the desired variable. The page will refresh.

Drill in: To create a list of clients meeting a specific cross-section (i.e., high risk referrals with an immediate response priority), click on that cell.

Filters limit whose case data is shown, e.g., data for an office or unit.

Apply/clear a filter: Click the Filter icon -> select a category (e.g., County) -> select an item (e.g., Orange) -> click the Filter button. To clear, click the Filter icon and click the Clear button.

Apply a multi-filter: Click the Filter icon -> select the category -> select the first item (e.g., Orange) -> press the Ctrl key -> select the next item (e.g., Alameda). Repeat as needed. Click Filter.

Save a custom filter: Apply your filter -> click the Filter icon -> click Save -> name the filter in the pop-up -> click Save. Access from "Saved" Filters.

Other Report Tabs

Graph: Shows performance over time. See category counts for any timeframe. Drill into a category to open a list of all cases in that category.

Full List: Displays information for every case included in the report. Select/deselect which list columns to view (bottom left corner). Access a history for any record on the list by clicking the history icon.

Map: Shows geographic distribution for all cases on a report. Use to see case/referral density or identify/monitor clients near a natural event.

Help: Displays the report's scope, definitions for report categories, any exclusions (limits), methodology, and policy. Click green text for more help.