Dashboard Navigation

And

Reports Guide
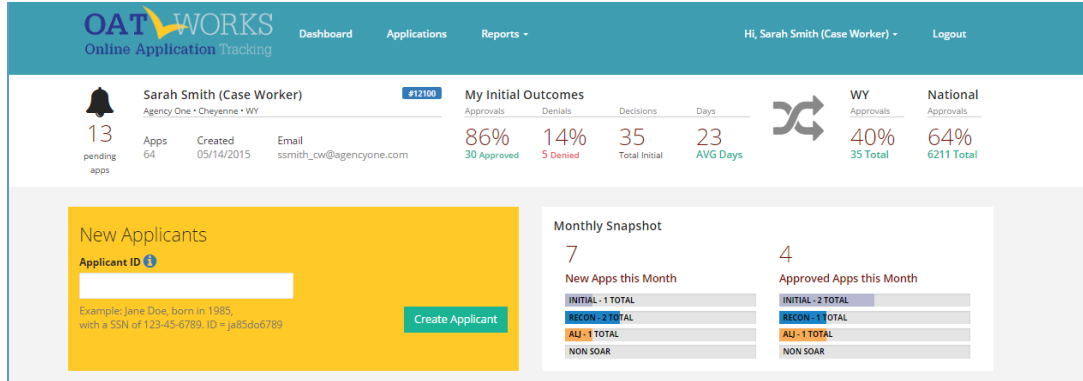
OAT Online Application Tracking

Table of Contents

Dashboard

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

Dashboard – All Users

Menu Bar

- Navigate between the Dashboard, Applications page, and Reports page.
- View your profile by clicking on your name on the top right.
    - You can edit your name, phone, email address, and password.
    - You are not able to change your location, role, or agency.

User Summary

Pending Applications

- Applications the user has entered into OAT for which a Decision is pending.

User Details

- Name, Role, Agency, City, State, Email
- Apps: Total number of applications entered in OAT regardless of type or decision status
- Created: Date OAT account was created

My Initial Outcomes

- Outcomes for the user's initial applications that have a decision entered into OAT.

State Outcomes

- The state approval rate is updated annually by the SAMHSA SOAR TA Center.

National Outcomes

- The national approval rate is based on outcomes reported by all states in the previous fiscal year, including those not tracked in OAT.

New Applicants

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

Monthly Snapshot

The monthly snapshot displays the user's activity for the *current* month: New Applications created and Approvals for each application type.

Case Worker Dashboard

Applications Grid

Pending Apps View

Application Type
- You can choose to view only certain application types (Initial, Reconsideration, ALJ Hearing, or Non-SOAR).

Columns
- ApID, PFD (Protective Filing Date), Application Submission Date, Application Type, Application Status, and Actions
- Click on column heading to sort by: ApID, PFD Date, or Type.

View/Edit Application
- Click on the ApID **or** "Continue" in the Actions column to enter additional information about the case.

Application Type

▪ You can choose to view only certain application types.

Columns

▪ ApID, Current Application Type, Current Application Status, Days to Decision, # Apps (application types this ApID has progressed through), Actions

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

View/Edit Application

▪ New or Pending cases:
  o Click on the ApID **or** "Continue" in Actions Column to enter additional information about the case.

▪ Approved or Denied cases:
  o Click on the ApID **or** "Actions: Overview" in Actions Column to see an Applicant Overview.
  o Click on "Actions: Post Decision" in Actions Column to enter Post-Decision information about an application *(if it has not yet been entered).*

Agency Lead Dashboard

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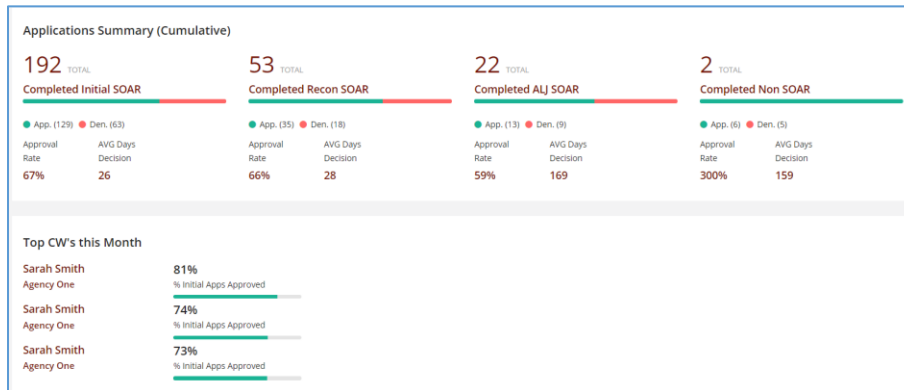
Applications Summary (Cumulative)
- Approval Rates and Average Days to Decision for all of the Agency's completed applications.

Top CWs this Month
- Top Case Workers within the agency based on approval rates.

Applications/Case Workers Grid

Pending Apps View

Users
- You can choose to view a particular Case Worker.

Columns
- ApID, PFD, Application Submission Date, Case Worker, Application Type, Application Status, Actions
- Click on column heading to sort by: ApID, PFD Date, Case Worker, or Type.

View/Edit Applications
- Click on the ApID **or** "Continue" in the Actions column to enter additional information about the case.
- Clicking the name of the Case Worker will take you to their "Applications" page.

[Agency Name] Case Workers View

Users
- You can choose to view a particular Case Worker.

Columns
- Case Worker, Approval Rate Progress Bar, Total Decisions, Average Days to Decision, Actions
- Click on column heading to sort by Case Worker.

View Applications
- Clicking the name of the Case Worker **or** clicking "Actions: View Applications" in the Actions column will take you to their "Applications" page.

Local Lead Dashboard

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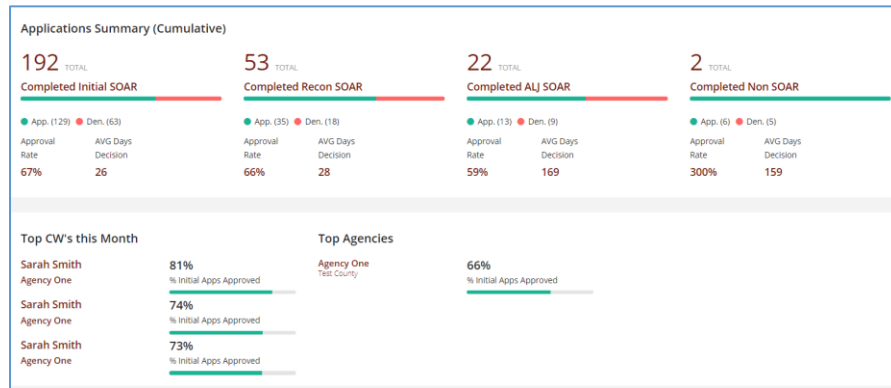
Applications Summary (Cumulative)
- ▪ Approval Rates and Average Days to Decision for all completed applications in the Local Lead's assigned cities/counties.

Top CWs this Month and Top Agencies
- ▪ Top Case Workers and Agencies from the assigned localities based on approval rates.

Applications Grid
Pending Apps View

Users
- ▪ You can choose to view a particular Case Worker.

Columns
- ▪ ApID, PFD, Application Submission Date, User Name, Role, Application Type, Application Status, Actions
- ▪ Click on column heading to sort by: ApID, PFD Date, Case Worker, or Type.

View/Edit Applications
- ▪ Click on the ApID link **or** "Continue" in the Actions column to enter additional information about a case.
- ▪ Clicking the name of the Case Worker will take you to their "Applications" page.

Users

- You can choose to view a particular Case Worker.

Columns

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

View/Edit Applications

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

State Team Lead Dashboard

State Outcomes Summary
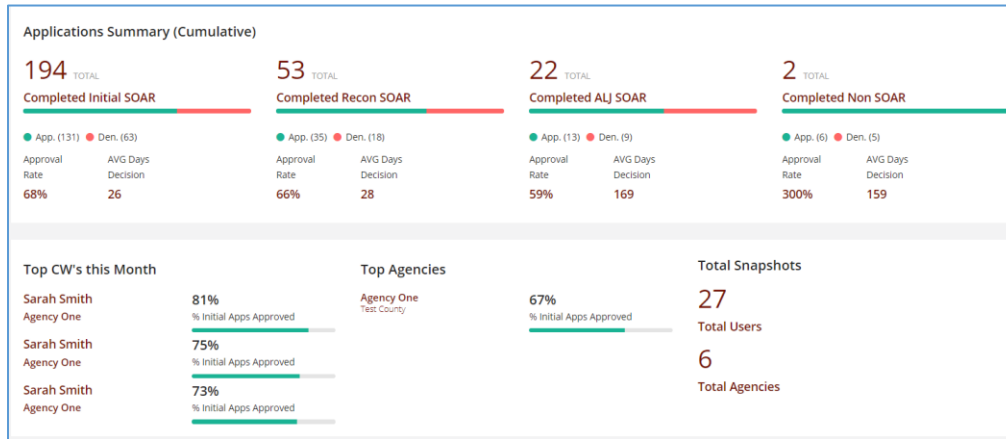
Applications Summary (Cumulative)

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

Top CWs this Month and Top Agencies

- Top Case Workers and Agencies in the State based on approval rates.

Total Snapshots

- Quick view of the total number of Users and Agencies in the State.

Applications Grid

State Agencies View

County/Agency

- You can choose to view a particular County and/or Agency.

Columns

- Agency, Agency Lead, Local Lead, Approvals/Denials (progress bar), Days (Average Days to Decision), Initial, (# Initial Applications Entered), Decisions (# Decisions Entered for all application types), Actions
- Click on column heading to sort by: Agency, Agency Lead, Local Lead, Initial Applications, or Decisions Received.

View Users/Applications

- Click on Agency Name to view all users from that agency.
- Click on Agency Lead or Local Lead name to go to that User's "Applications Page."
- Actions Options:
    - o View Applications: View all applications from that agency
    - o View Users: View all users from that Agency.
    - o View Reports: View an overall state progress graph report (see below).

All Users View

Columns

- (Date OAT Account) Created, Last Name, Email, State, Role, Agency, Status, Actions.
- Click on column heading to sort by any of the above columns.

View Agencies/Users/Applications

- Click on Email or "View Cases" from the Actions column to go to that User's "Applications" page.
- Click on Agency Name to view all Users registered in OAT from that Agency.

Pending Applications View

Application Type
- You can choose to View particular Application Types (Initial, Reconsideration, ALJ Hearing, or Non-SOAR).

Columns
- ApID, PFD, Application Submission Date, Agency, Case Worker Name, Application Type, Application Status, Actions
- Click on column heading to sort by: ApID, PFD Date, Agency Name, Case Worker, or Type.

View/Edit Applications
- Click on the ApID link **or** "Continue" in the Actions column to enter additional information about a case.
- Clicking on the name of the case worker will take you to their "Applications" page.

Applicant Overview

Clicking on the ApID or choosing "Overview" from the Actions column for any case with a decision will bring you to an Applicant Overview page

- A green thumbs up indicates that the claim was approved. A red thumbs down indicates a denial.
- The applicant ID, applicant's demographic information, Case Worker 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 Hearing *(if applicable)*. The word "Current" will appear next to the current application type.
- An overview of the activity about the application as it progressed through application types is also provided.

Applications Page

- The Applications page can be accessed from the menu bar (all users) or by clicking on a user's name from the dashboard (Agency, Local, State Leads).
- This page allows all users to view their *own* applications, and also allows SOAR Leads to view all applications from their Agency, Locality, and/or State.
- Applications are grouped by Application Type (New, Initial SOAR Applications, Reconsideration SOAR Applications, etc.)
- Filters can be used to display only particular Applications (See "Using Filters" below)

Search

- Enter an ApID into the "Search" box at the top of any Application Type **or** in the "Search ApIDs" box at the top of the page to search across all Application Types.
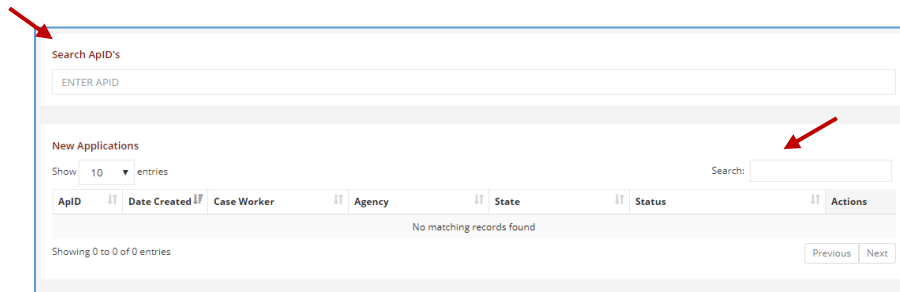
View/Edit Applications

- Approved or Denied cases – ALL OAT Roles:
    - Click on the ApID link **or** "Actions: Overview" in Actions Column to see the Applicant Overview.
    - Click on "Actions: Post Decision" in Actions Column to enter Post-Decision information about an application *(if it has not yet been entered)*
- New or Pending cases – Case Workers (*or other roles for cases they have entered*)
    - Click on the ApID to enter additional information about the case.

Filters

- All Roles: Filter by Veteran Status, Age, Living Situation, Date Created, and Application Status
- Additional Filters are available to SOAR Leads:
    - Agency Leads: User Name
    - Local Leads: Agency
    - State Team Leads: County
- Choose filters and click the green "Filter" button. To clear all Filters, click "**x** Reset."
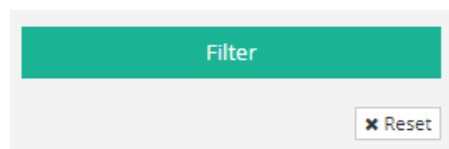
Reports
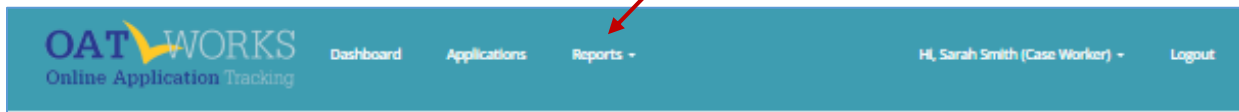
- The "Reports" feature can be accessed from the Menu Bar.
- A drop-down menu allows users to select "Individual" or "Summary" Reports (All Roles), as well as "User Summary Reports" (Agency, Local, State Leads only).
- Only applications that have **received a decision** will appear in Reports. *"New" or "Pending" applications will not appear in Reports.*
- Filters can be used for all Report types (See "Using Filters" below)

Using Reports

We recommend that reports be used to celebrate the success of individual case workers, agencies, and localities that are promoting SOAR with great outcomes!

Role	Can Access Data From…	Reports Most Helpful for….
Case Worker	▪ Their own application entries*	Tracking successes and considering areas where technical support is needed to improve
Agency Lead	▪ Assigned agency ▪ All case workers assigned to that agency	Considering targeted technical assistance or reviewing outcomes at steering committee meetings
Local Lead	▪ One or multiple counties/localities/regions ▪ Agencies assigned to these localities ▪ Case workers from those agencies	Reviewing outcomes across agencies and counties and considering areas for additional follow-up support
State Lead	▪ All case workers from all agencies in all localities across the state	Reviewing state plans, considering targeted technical assistance or support for particular agencies or localities

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

Individual Reports

- Individual reports display all data entered for applications that *have received a decision.*
- Use the gray bar at the bottom to scroll across the screen to view all the data.
- Click on an ApID to see the Applicant Overview.

Summary Reports

There are three types of summary reports: *Overview*, *Optional Information*, and *Non-SOAR*. Choose Report Type at the top of the page; choose any applicable filters, and then click "Filter" to display the report.

Overview Summary Report

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

OVERVIEW

	Initial SOAR	Reconsideration	ALJ Hearings
Approvals	99	24	11
Denials	44	13	6
Total Decisions	143	37	17
Approval Rate (%)	69%	65%	65%
Avg Days to Decision	33	39	165

APPROVED FOR

SSI Only	60 (61%)	13 (54%)	5 (45%)
SSDI Only	2 (2%)	5 (21%)	2 (18%)
Both	30 (30%)	5 (21%)	3 (27%)
Not Completed Decision entered, benefit detail not provided*	7 (7%)	1 (4%)	1 (9%)

*Please add post decision details including benefit awarded.

DEMOGRAPHICS (OF ALL DECISIONS)

Male	77	20	8
Female	66	17	9
Military Service	54	17	8
Average Age	38	38	40

HOUSING STATUS (OF ALL DECISIONS)

Outdoors	37	3	1
Shelter	61	15	6
Transitional	6	3	3
Own, room, or house	14	5	3

Optional Information Summary Report

This report provides a summary of Post-Decision information entered for SOAR-Assisted Applications (e.g. Medicaid/Medicare reimbursements, back payments, reasons for denial, etc.). The figures represent total amounts for all applications for which post-decision information was entered.

OPTIONAL INFORMATION

REIMBURSEMENTS	Initial SOAR	Reconsideration	ALJ Hearings
Medicare			
Total dollar amount	$42,402.00 (15)	$3,679.00 (6)	$100.00 (1)
Average per applicant	$2,826.80	$613.17	$100.00
Medicaid			
Total dollar amount	$129,350.00 (33)	$50,578.00 (10)	$5,300.00 (2)
Average per applicant	$3,919.70	$5,057.80	$2,650.00
General or Public Assistance			
Total dollar amount	$28,218.00 (32)	$9,632.00 (12)	$1,577.00 (3)
Average per applicant	$881.81	$802.67	$525.67
APPLICANT INCOME			
Monthly SSI			
Total dollar amount	$53,853.00 (81)	$9,993.00 (16)	$3,053.00 (5)
Average per applicant	$664.85	$624.56	$610.60
Monthly SSDI			
Total dollar amount	$17,088.00 (29)	$8,649.00 (11)	$1,100.00 (2)
Average per applicant	$589.24	$786.27	$550.00
Retroactive Payments			
Total dollar amount	$327,034.00 (45)	$204,178.00 (13)	$18,700.00 (3)
Average per applicant	$7,267.42	$15,706.00	$6,233.33
Applicant Working (Y)	10	4	2
Applicant Earnings/Month	$4,613.00	$400.00	$400.00
Working Post-Decision (Y)	2	-	-
Post-Decisions Earnings/Mo.	$500.00	-	-

Non-SOAR Summary Report

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

Export to Excel or Display as a PDF

Once a Summary 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.

User Summary Report

This report is available **only** to SOAR Leads, and displays information about all SOAR users that fall within the Leader's Agency, Localit(ies), or State.

SOAR Users Grid

Columns

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

View Agency/Applications

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

Filters

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

Export to Excel or Display as a PDF

Once a User Summary Report has been generated, you have the option to export the information to Excel.

Using Filters

Veteran	Age	Living Situation	Filter by Date of Decision
Show All ▼	Show All ▼	Select All	01/01/2000 - 02/05/2019 📅
Training Type	**Funding Type**	Outdoors (e.g., street, abandoned or	
Show All ▼	Show All ▼	Shelter	
		Transitional	
		Own or someone else's apartment, r	Filter
		SRO, boarding house	
			✖ Reset

Report Filters Available to All Users

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

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

Training Type
- Choose the SOAR training that the case worker has attended, based on information provided during registration.

Funding Type
- Choose the type of funding that supports the case worker's agency/position, based on information provided during registration.

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

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

Role-Based Filters

Additional filters are available based on the user's role and the data that is available to them.
- Agency Leads: Users
- Local Leads: Counties, Agencies, Users
- State Team Leads: Counties, Agencies, Users, City (User Summary Report only).
- Choose filters and click the green "Filter" button. To clear all Filters, click "**x** Reset."

Filter
✖ Reset
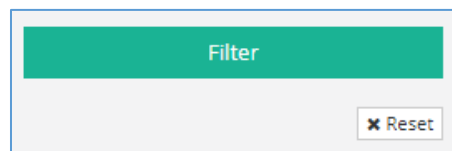
If you have any questions about SOAR OAT please contact the SAMHSA SOAR TA Center at soaroat@prainc.com