



WIHV Report Guide: WIHV Tasks Report – Family Dashboard



This guide provides an overview of the new Family Dashboard of the WIHV Tasks Report.

What is the purpose of this report?

The WIHV Family Dashboard provides a comprehensive list of all tasks that will be due for any currently or newly enrolled family, as well as an overview of a family's historical task completion across all enrollments.

Tasks and Completion Status on this report:

This report uses the same logic as the rest of the Tasks report, meaning the tasks, timings, due dates, and completion status logic is the same on the Family Dashboard. The data represented on the report is calculated **as of the day the report is being viewed**, and is not intended to have user-adjustable date filters.

Filters used in this report:

You can filter data on this report by Grantee, Organization, Home Visitor, Primary Caregiver, Client Enrollment Period, Current Enrollment Status, and can also sort the table using the "Sort Order" menu.

Grantee	Organization	Home Visitor	Primary Caregiver	Client Enrollment Period	Current Enrollment Stat...	Sort Order
(All)	(All)	(All)	(None)	(All)	(All)	Date Due

Using the Family Dashboard:

Upon opening the Family Dashboard, you will need to select a Primary Caregiver in order to show data for the selected family. You can either select the Primary Caregiver directly, or limit your search by first selecting the Home Visitor or Current Enrollment Status prior to selecting the primary caregiver. You can also type the name of the Primary Caregiver to select them from the list. Upon selecting a Primary Caregiver, you will see their Family Enrollment information, a bar denoting the task completion status of all tasks currently being shown for the family, and a table to all tasks ever due for the family.

Family Enrollment Information:

This section of the dashboard will display all family members associated with the selected Primary Caregiver, as well as data on their enrollments. For families with multiple enrollment periods, users can see a row in the table for each enrollment period, and can filter any one of

them using the “Client Enrollment Period” filter. Additionally, if users select “Enrolled” in the “Current Enrollment Status” filter, it will only show the enrollment data for their current enrollment period.

Completion Status Bar:

This bar shows the count of all tasks shown on the dashboard for a family by completion status, and selecting any segment of the bar will filter the tasks list below.

Tasks due table:

This table will show the full list of all tasks due for a family. Each family member has a column associated with all of their tasks on the right side of the table, and all tasks shown on the table are labeled and color coded depending on their completion status. For families with multiple enrollment periods, the table will show tasks due for every enrollment period unless they are filtered out using the Client Enrollment Period or Current Enrollment Status filters. The tasks can also be sorted by using the “Sort Order” menu on the top right of the page.

Printable tasks list:

To accommodate users who would like to use the Tasks due table for a family as a cover sheet for that family’s case file, they can navigate to the “Printable Cover Sheet” tab of the report. This tab will display a copy of the Tasks table for the selected family using only family members’ initials, along with instructions for printing the table. Note that additional printer formatting may be required to get the desired printout.