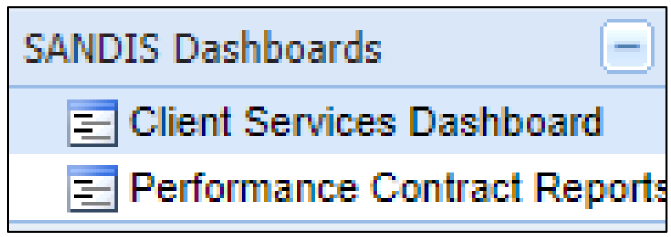
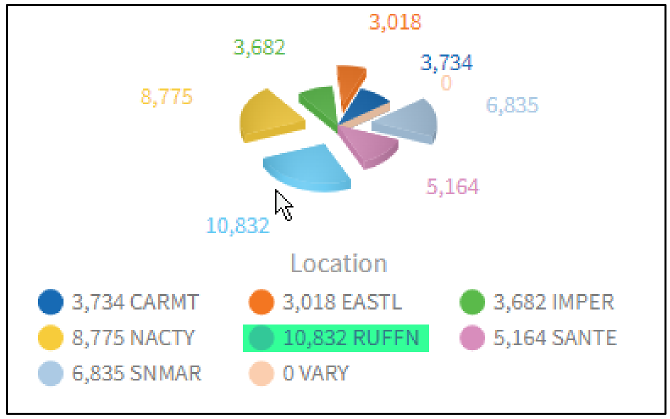
Client Services Dashboard

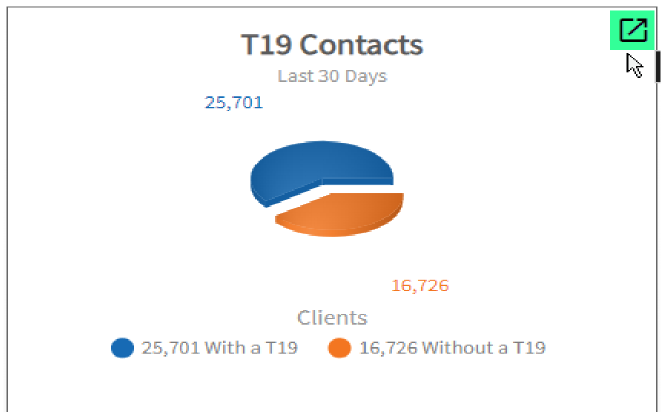
This program provides users with the ability to view reports with statistics and chart graphics for the regional center. There are options to view reports for T19, Caseloads, Diagnosis, Waivers and Immunizations.

Users can find the Client Services Dashboard program by locating the **SANDIS Dashboards** menu. Click on the + sign to display the available options and select **Client Services Dashboard.**	
A concise overview will show various real-time reports for the regional center, ensuring accuracy up to the moment the program is accessed.	

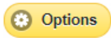
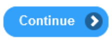
The chart graphic is interactive, and different sections of the pie chart can be separated from the main graphic by clicking on the text below the chart. The chart can also be rotated by clicking and dragging the chart in a circular motion.



Click on the icon located in the top-right corner of the screen to open a report in detailed view.



The selected report will open a detailed view. The pie chart image can be toggled between a pie chart or bar graph view. The chart graphics can be rotated, and users can click the icon in the top right corner of the image to expand the chart into a full-screen view.

<table>
<tr>
<td>
Click the  button to change the date range for the report. Users can change this by clicking Contact Date and selecting from either preset options or a custom date range can be specified.
After making a change, click the  icon to reload the report with data from the specified date range.
</td>
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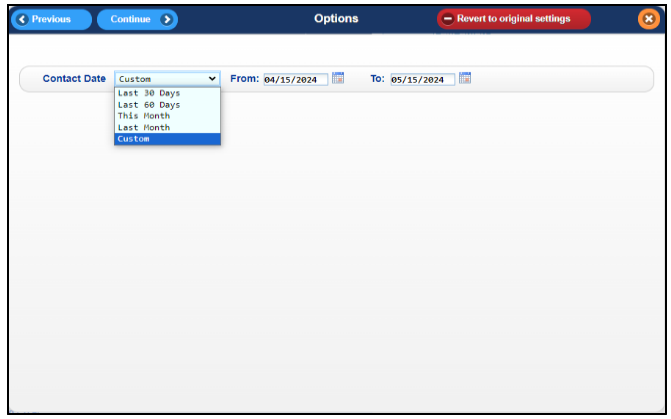

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When selecting any report, the default date range is data from the Last 30 Days. If any date range was modified to a different value, users can revert the change back to the default setting.
To set the date range back to the default, click on the Revert to original settings button.
</td>
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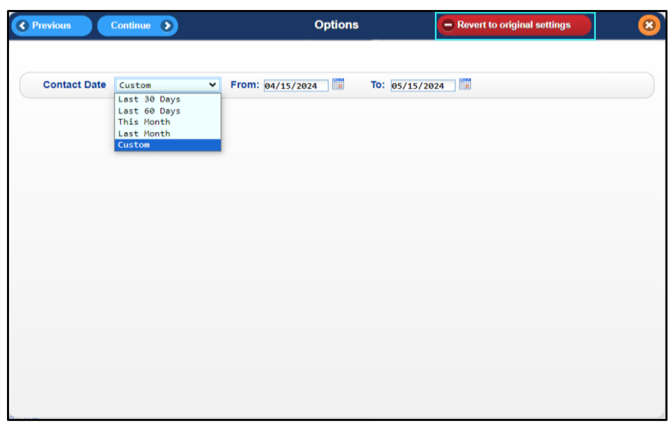

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</tr>
</table>

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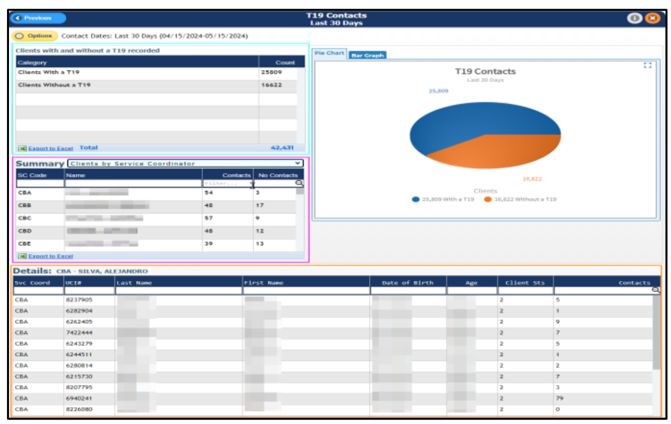
Reports will display different columns and information depending on the type of report selected and the data that is available.

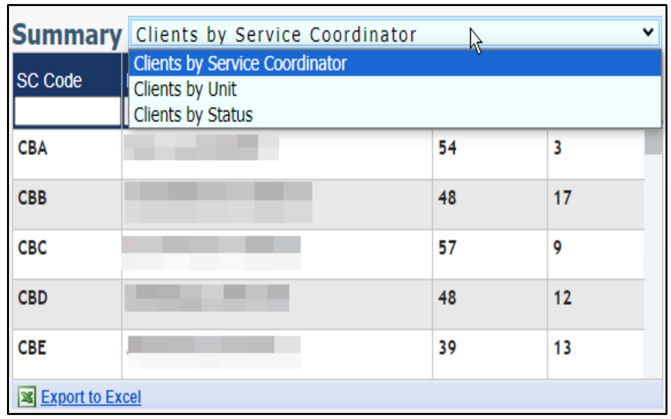
Reports are separated into three sections, the top portion containing a **Category**, the middle portion containing a **Summary** view and the bottom portion containing a **Details** view.

Click on any row in the category section to filter your results. Clicking on any row in the summary section will generate a report in the **Details** view.

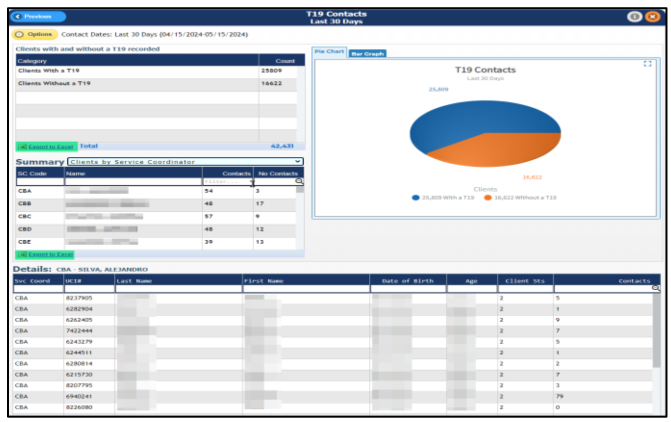


The **Summary** section contains various options to sort the report depending on the data displayed.

For example, the T19 report has options to display T19 contacts by Service Coordinator, by Unit or by Client Status.



Each section can generate an Excel copy of each report view by clicking on the **Export to Excel** icon in the bottom left corner of the view. The report will be downloaded to the current browser's Download folder.



Multiple filters can be applied where a table contains dark blue headers.

Right-Click and select **Filter** or type the desired filter value into the text box below the header to apply a filter to the report.