

HOME

Administrator Manual

2-1-1/United Way Monterey County
California American Water Program

March 2018 edition v2

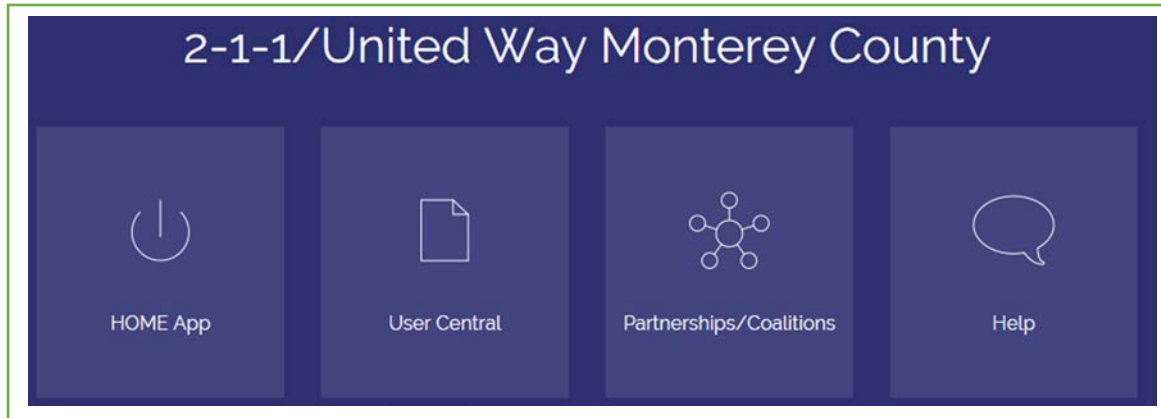
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| Landing Page

The Landing Page provides access to HOME, documents and workflow manuals, links to 211/United Way sites, and access to the CTA Help Desk.

Landing Page link: ctagroup.org/2-1-1-united-way-monterey-county/



HOME App: click to access the HOME login page

- Click "Sign In with HMIS"
- Enter Username (typically an email address) and Password
- Click "LOGIN"

User Central: click to access forms and documents

Partnerships/Coalitions: opens Monterey County Collaborative site

Help: click to access the Help Desk to ask CTA a question or to seek assistance

Forgot password?

- Click "Forgot password?"
- Message will display: "Please provide your username and your new password will be sent to the registered email address."
- Enter Username
- Click "Submit"
- Check your email account and follow the prompts detailed in the email

Need additional assistance?

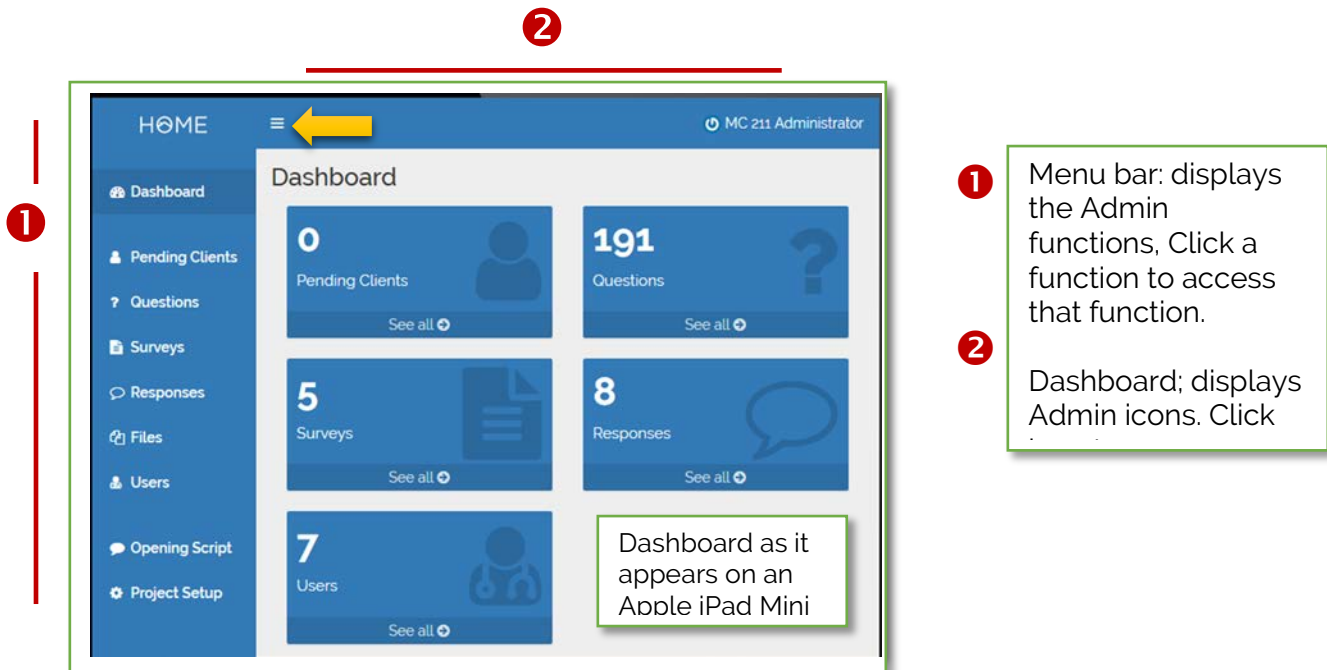
Click the Help icon on the Landing page.

Link: ctagroup.org/2-1-1-united-way-monterey-county/2-1-1-help-desk/

Thanks to the Cisco Foundation
for their generous support

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Dashboard



Resize tool

Click  (yellow arrow) to collapse/expand the Menu Bar.

What is the functionality of each of feature?

Pending clients

Search for existing clients, add new clients, clients with an incomplete questionnaire.

Questions

Questions entered in HOME. Add new questions to create new surveys

Surveys

List of available surveys. New surveys are created here

Responses

Lists all clients with a completed questionnaire, regardless of eligibility status.

Files

List of all clients with uploaded documents.

.Users

Add, edit, or delete users. Assign access levels.

Opening Script

Add information or questions to ask client prior to any data entry.

| Add a New User

Click Users

Click + Create User

Enter:

User's email address

Password (see green bar for details)

Re-enter/confirm password

Password

- At least 8 characters in length
- At least one Capital letter
- At least one number, and
- One of these symbols: ! @ # \$ *

First Name

Last Name

Click: Create user (yellow arrow)

What happens after I click "Create User"?

1. An email is sent to the user's email address requesting the user activate their account.
2. User will click to activate, then click "Confirm"
3. User will receive a second email confirming account has been activated

The Admin then has to assign an access level to the new user.

From the Users page, locate the user you created. Click **Edit** (right side of screen).

Scroll down to the bottom of the page to display **Roles**.

1. Click Role that best matches what the user
2. Select **Admin** for user who can add/delete users, create new surveys.
3. Select **Case Manager** for users who will enter Questionnaire data.

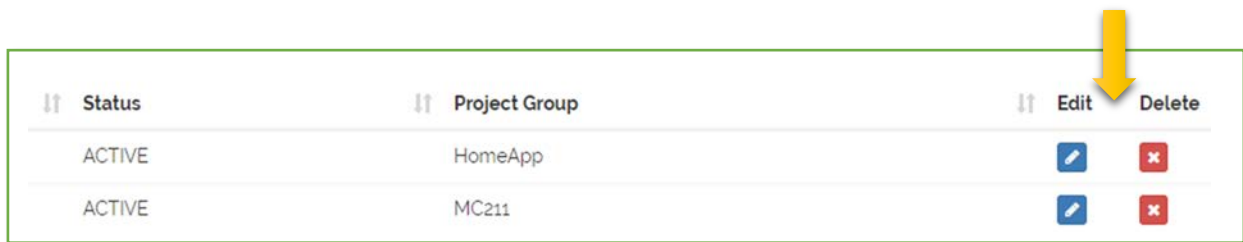
The screenshot shows a web form titled "Users New". It contains the following fields: "Email" (text input), "Password" (text input), "Password confirm" (text input), "Account Details" section with "First name", "Middle name", and "Last name" (text inputs), and a "Gender" dropdown menu. At the bottom, there are two buttons: "Create user" (highlighted with a yellow arrow) and "Cancel".

The screenshot shows a section titled "Roles". Under the heading "HOME roles", there is a list of roles with checkboxes: "Developer", "System Admin", "Admin", "Program Manager", "Case Manager", "Surveyor", and "External Surveyor". A "Submit" button is located at the bottom of the list.





| Edit or Delete User

Click Users

Locate the user to edit or delete, then scroll to the right.



The screenshot shows a table with three columns: Status, Project Group, and a set of action icons. The first row shows a user with Status 'ACTIVE' and Project Group 'HomeApp'. The second row shows a user with Status 'ACTIVE' and Project Group 'MC211'. In the action column, there are two blue pencil icons (Edit) and two red 'X' icons (Delete). A yellow arrow points to the top-right corner of the table, specifically to the Edit and Delete icons.

Status	Project Group	Edit	Delete
ACTIVE	HomeApp		
ACTIVE	MC211		

Edit and Delete icons will appear.

Click **Edit** to update the User's profile. The User's profile page will appear:

- Update any data field (name, email address, or password)
- Need to update access level?

Click **Delete** to remove User from HOME:

- Confirm delete window will appear
- Click **Delete**

| Questionnaire Workflow

A call is received from a Monterey County resident seeking Cal Am assistance:

① Access HOME using your login credentials to display the Dashboard

② Click Pending Clients

Search Existing Client page appears.

- Enter client's first/last name (green arrow). Possible matches may appear.

Client in system? If there is a possible match, a list of name(s) will appear. Click on match to access client's file.

Client not in system?

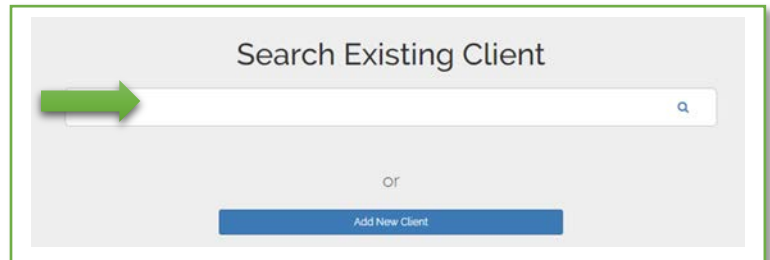
Proceed to step 3

③ Click Add New Client

- Preliminary Survey appears
- Ask client both ?s
- Click **Yes**: If client is a customer and has contacted customer service
- Click **No**: If client is not a customer and/or has not contacted customer service

Clicking Yes: takes you to Client Profile page

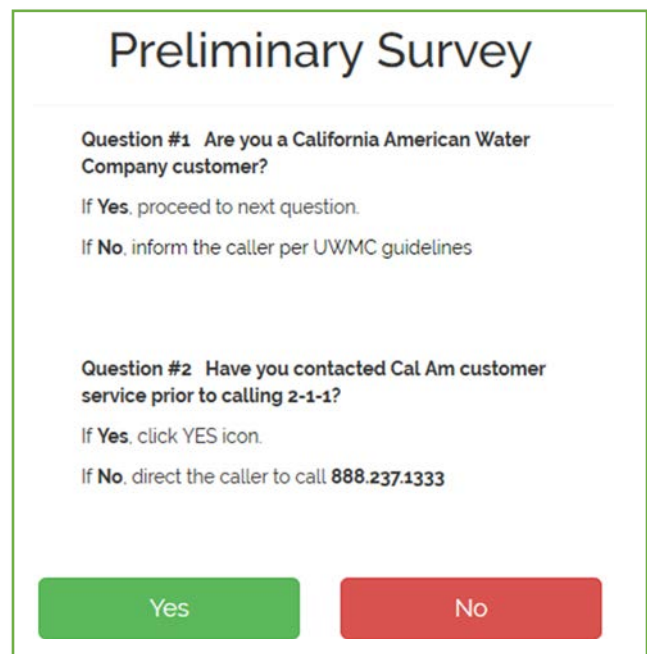
Clicking No: returns you to the dashboard



Search Existing Client

or

Add New Client



Preliminary Survey

Question #1 Are you a California American Water Company customer?

If **Yes**, proceed to next question.
If **No**, inform the caller per UWMC guidelines

Question #2 Have you contacted Cal Am customer service prior to calling 2-1-1?

If **Yes**, click YES icon.
If **No**, direct the caller to call 888.237.1333

Yes No

| Questionnaire Workflow

④ Client Profile page

Clicking Yes on the Preliminary Survey page takes you to the new Client page.

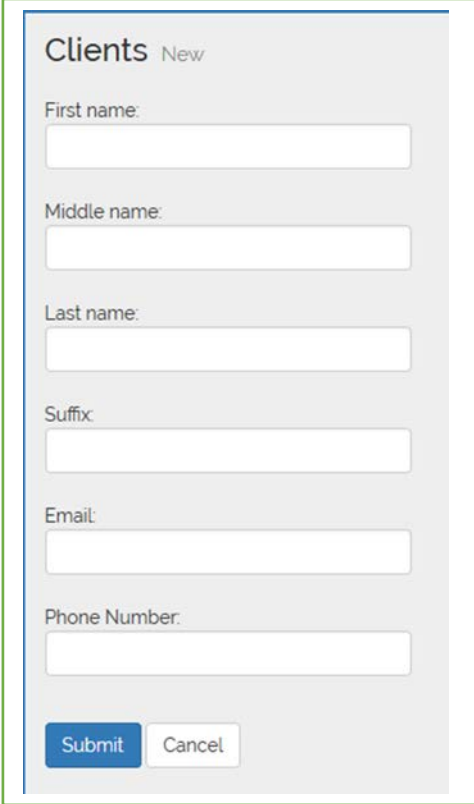
Creating a new client creates a unique client ID for that client.

Creating the Client Profile

1. Enter First Name, and Last Name
2. Enter Email
3. Enter Phone Number.
4. **Middle name and Suffix are optional**

Click **Submit**

Clicking Submit takes you to the Select Survey page.

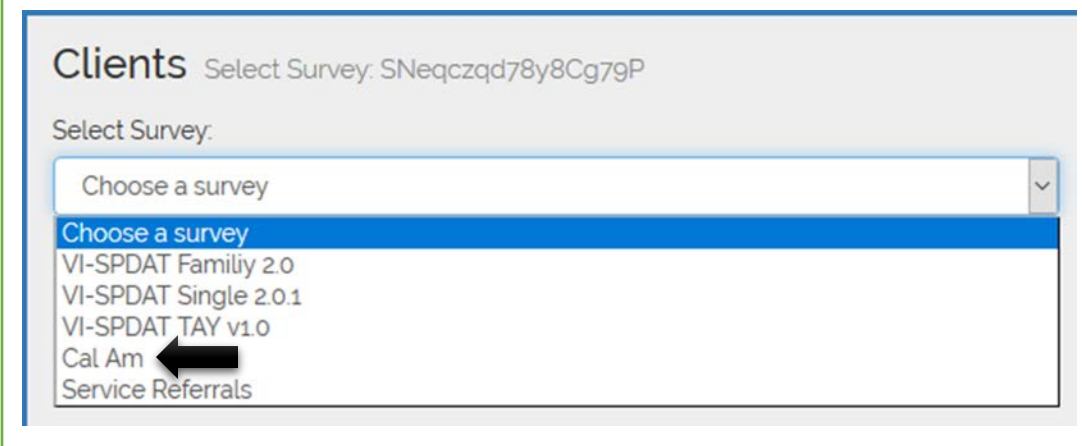


The screenshot shows a web form titled "Clients New". It contains the following fields from top to bottom: "First name:" with a text input box; "Middle name:" with a text input box; "Last name:" with a text input box; "Suffix:" with a text input box; "Email:" with a text input box; and "Phone Number:" with a text input box. At the bottom of the form are two buttons: a blue "Submit" button and a white "Cancel" button with a grey border.

| Questionnaire Workflow

5 Client Survey page

Choose a survey: click to reveal a drop-down menu of survey choices



The screenshot shows a web interface titled "Clients" with a sub-header "Select Survey: SNeqczqd78y8Cg79P". Below this is a "Select Survey:" label and a dropdown menu. The dropdown menu is open, showing a list of survey options: "Choose a survey", "VI-SPDAT Family 2.0", "VI-SPDAT Single 2.0.1", "VI-SPDAT TAY v1.0", "Cal Am", and "Service Referrals". A black arrow points to the "Cal Am" option.

- Select survey. Example: Cal Am (black arrow)
- Click **Next**
- Selected survey loads
- Client data entered on Client Profile page auto populates the Questionnaire page (examples: First Name, Last Name, Email, Phone)

6 Complete Survey

- The Cal Am survey contains 20 questions
- Two options at bottom of survey
 - **Upload survey:** click to upload the survey to data warehouse
 - **Pause survey:** click if survey not complete and client has asked to complete at a later time

| Post Questionnaire Submission

What happens after the Call Specialist clicks submit and the client file is uploaded to the warehouse?

- Email #1 or #2 sent is automatically sent to client, Cal Am and United Way.
- Email #1 is sent if client in arrears but has not received a 3 day notice
- Email #2 is sent if client is in arrears and has received a 3 day notice. Clients with a 3 day notice have 48 hours to submit required documentation to United Way.
- Match determines if client is eligible. If eligible, client goes to Active List. If not eligible, client goes to Responses.

United Way (waterhelp@unitedwaymcca.org) will upload documentation to client emailed or faxed to United Way. If the client is eligible for financial assistance, United Way sends email #3. If client not eligible, United Way will send email #4.

- Once requested documentation received and uploaded, the Administrator, clicks "Send Email #3" to client, United Way and Cal Am, stating client is eligible for financial assistance.
- If documents not in order, or if client deemed not eligible for other reasons, United Way will issue email #4 to client, United Way, and Cal Am.

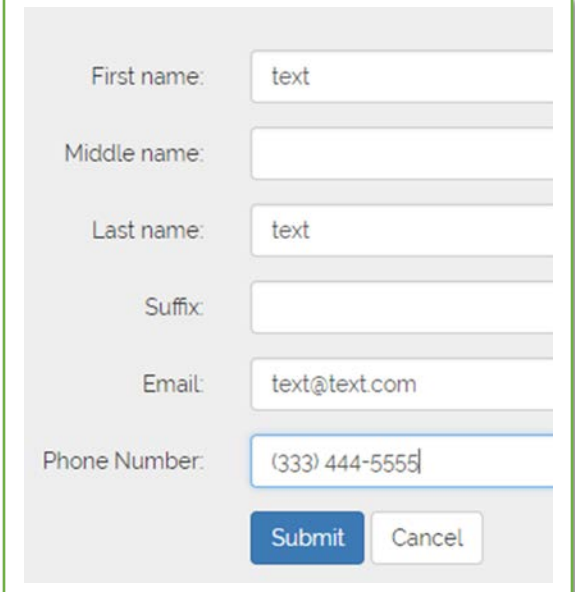
| Edit Client Profile or Questionnaire

Need to edit First Name, Last Name, Email or Phone Number?

- Go to Responses
- Locate client
- Click on client's name
- Delete existing text
- Type in correct text
- Click Submit

Need to edit Questionnaire (all other questions?)

- Go to Responses
- Locate client
- Click on Cal Am (to left of client's name)
- Edit or update as needed
- Click Re-Upload Survey (bottom of page)



The screenshot shows a form for editing a client profile. It contains the following fields and values:

- First name: text
- Middle name: (empty)
- Last name: text
- Suffix: (empty)
- Email: text@text.com
- Phone Number: (333) 444-5555

At the bottom of the form are two buttons: a blue "Submit" button and a white "Cancel" button with a grey border.

| Responses

Responses detail all clients with a completed Questionnaire. The Response page details:

- **Survey:** Details which survey/questionnaire has been completed on behalf of the client. Click the survey to access the client's survey.
- **Client:** Name of the client. Click on name to access the client's Profile page.
- **Date Created:** Date the survey was first completed.
- **Date Updated:** If a completed survey is accessed and updated, the date of that update displays.
- **Status:** Details the date the client was uploaded to the data warehouse.

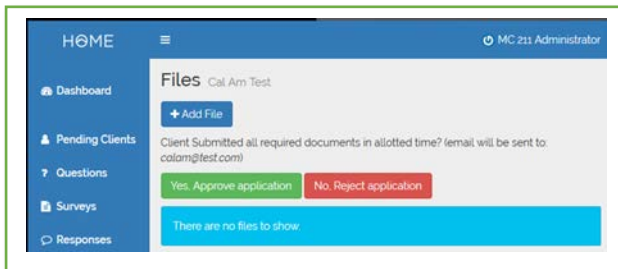
Files

Files allows United Way to upload documents and link those documents to a specified client. To upload documents:

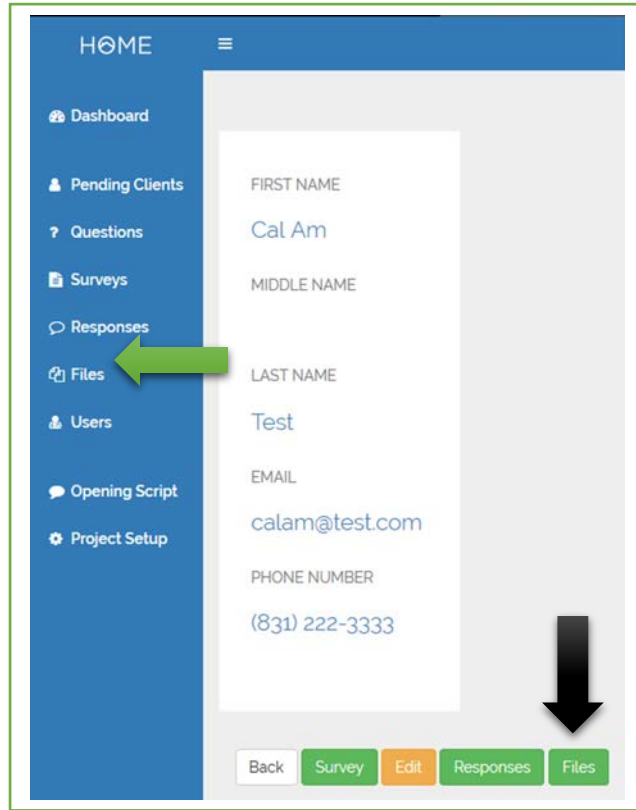
1. Access the client's Profile page
2. Click Files (black arrow)

Note: clicking Files on Menu bar (green arrow) takes you to a listing of all clients who have had documents uploaded to their client Profile page.

Clicking Files (black arrow) takes you to the File Upload page.

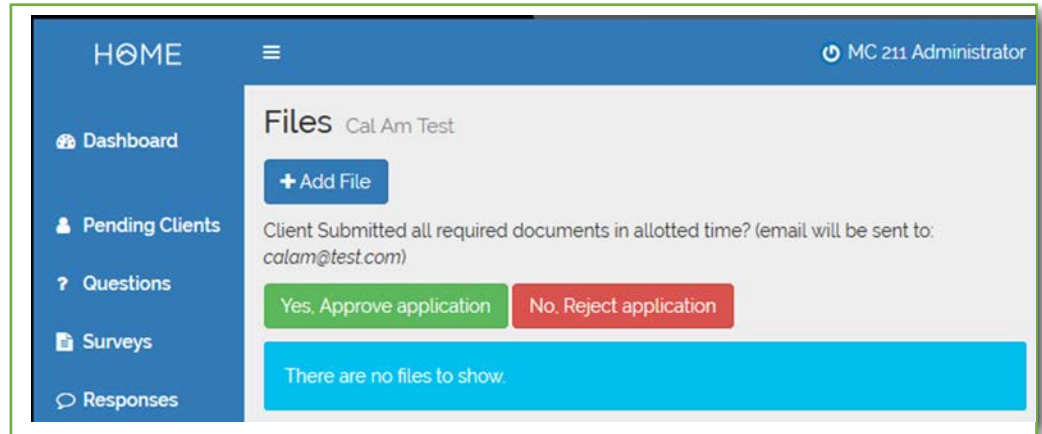


See next page for more details.



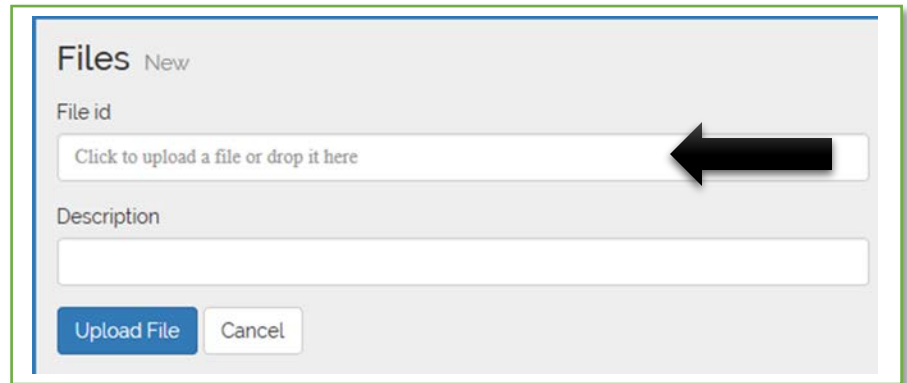
Files

Click **Add File** to upload file.



Files page will appear.

1. Click "Click to upload ..." (black arrow)
2. Search for document on your computer
3. Select document.
4. Description (enter a brief note)
5. Click **Upload File**
6. Uploaded file will appear immediately below Upload File



Once one or more documents uploaded:

1. Click, Yes, Approve application to send Email #3
2. Click No, Reject Application to send email #4

| Email Notification

Details the text of the emails.

Email # 1

Application Receipt (automatically to the Customer, Info copy to Cal Am and UWMC at time of Intake submission)

Date:

Subject: Application Receipt, Cal Am Water Hardship Benefit Program

Account: _____

Dear Customer:

Thank you for your application, it has been received. Your next step is to submit the necessary documentation discussed in your phone interview to support the application. It is important that this documentation be received within 48 hours of your phone call to continue processing the application. Timeliness is very important. Without the supporting documentation, the application process will end and the application rejected.

Documentation should be submitted by email to waterhelp@unitedwaymcca.org or by fax to (831) 372-4945 no later than (DATE).

Sincerely,
United Way Monterey County

Email #2

Application Receipt 3 Day Notice (Automatically to the Customer, Info copy to Cal Am and UWMC at time of Intake submission)

Date:

Subject: Application Receipt, 3 Day Notice of Water Shutoff

Account: _____

Dear Customer:

Thank you for your application, it has been received. We have notified Cal Am and a temporary hold has been placed on the work order that would have shut off your water. The next step for you is to submit the necessary documentation discussed in your phone interview to support your application. It is important that this documentation be received within 48 hours of your phone call in order to keep your water from being shut-off. Failure to do so will result in the temporary hold being removed and work will proceed to shut off the water. Documentation should be submitted by email to waterhelp@unitedwaymcca.org or by fax to (831) 372-4945 no later than (DATE).

Sincerely,
United Way Monterey County

| Email Notification

Details the text of the emails.

Email # 3

Application Approval (To the Customer, Info copy to Cal Am and UWMC. To be sent by UWMC staff, if appropriate and when the Intake form and supporting documents have been joined.)

Date:

Subject: Application Approval, Cal Am Water Hardship Benefit Program

Account: _____

Dear Customer:

Thank you for your application. We are pleased to let you know that it has been reviewed and approved. You will see payment made on your behalf on your next billing statement in the amount that due, up to the limit of the benefit program.

The Cal Am Water Hardship Benefit Program is funded by a grant from Cal Am to United Way Monterey County.

Sincerely,
United Way Monterey County

Email #4

Application Rejection (To the Customer, Info copy to Cal Am and UWMC. To be sent by UWMC staff, if appropriate and when the Intake form and supporting documents have been joined.)

Date:

Subject: Ineligible for Cal Am Water Hardship Benefit Program

Dear Customer:

Account: _____

After reviewing your application, we regret that it doesn't meet the criteria for approval. If you would like to review this decision, please contact Monterey County United Way at (831) 372-8026. We have notified California American Water regarding the rejection of your application. You should reach out to them immediately to discuss a different payment arrangement or options.

Sincerely,
United Way Monterey County

Financial Data

Details how to enter "Amount Paid" and "Date Paid" for each client receiving financial assistance.

How to enter financial data:

- Go to Responses. Click on client's name
- Client's profile page appears
- Click Survey
- Select "Amount Paid" from Choose a survey
- Click Next

The screenshot shows a web form titled "Responses" with a "New" status. The client name is redacted. The response status is "new". The form is titled "Amount of Assistance Provided". It contains a "Payment Information" section with a "Date of Payment" field (MM/DD/YYYY) and an "Amount Paid" field (0.00). There are two buttons: "Upload survey" (green) and "Pause Survey" (white). At the bottom, there is a checkbox for "Show Debug Info".

- **Date of Payment:** click on MM/DD/YYYY to display calendar
- Select date
- **Amount Paid:** enter amount
- Click **Upload Survey**

Financial data will appear in Tableau report. To view financial data in Tableau: click on Accepted clients.

| Tableau

To access the Cal Am Tableau report:

- Access HOME
- Click Reporting (black arrow)
- Tableau page will appear
- Click "Sign in to Tableau Online"
- Enter email address and password
- Click "Sign In"
- Cal Am report will load. It may take a minute or so for the report to load

