IWDS 2.0 Home Page Features

IWDS 2.0 TECHNICAL TRAINING DOCUMENTS

Purpose

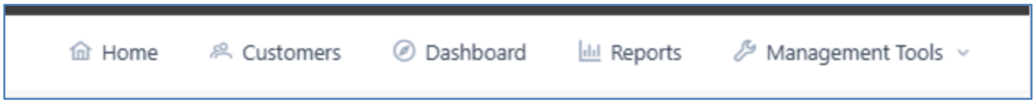
This document is intended to explain how to view and utilize the Home Page in the IWDS 2.0 System.

Audience

This document is designed to guide both trainers and end users through the process of viewing and navigating the Home Page in the IWDS 2.0 system.

Home Page – Top Navigation Bar

- Log into IWDS 2.0. (Link)



- The top Navigation Bar is displayed on every page in IWDS 2.0 and allows users to navigate the site.
    - **Home** – Returns to the Home Page
    - **Customers** – Search customers, applications and pre records
    - **Dashboard** – Shows customers in various statuses
    - **Reports** – View, run and download system reports
    - **Management Tools** – Access to Grants, Providers, Services, Security, and other system functions

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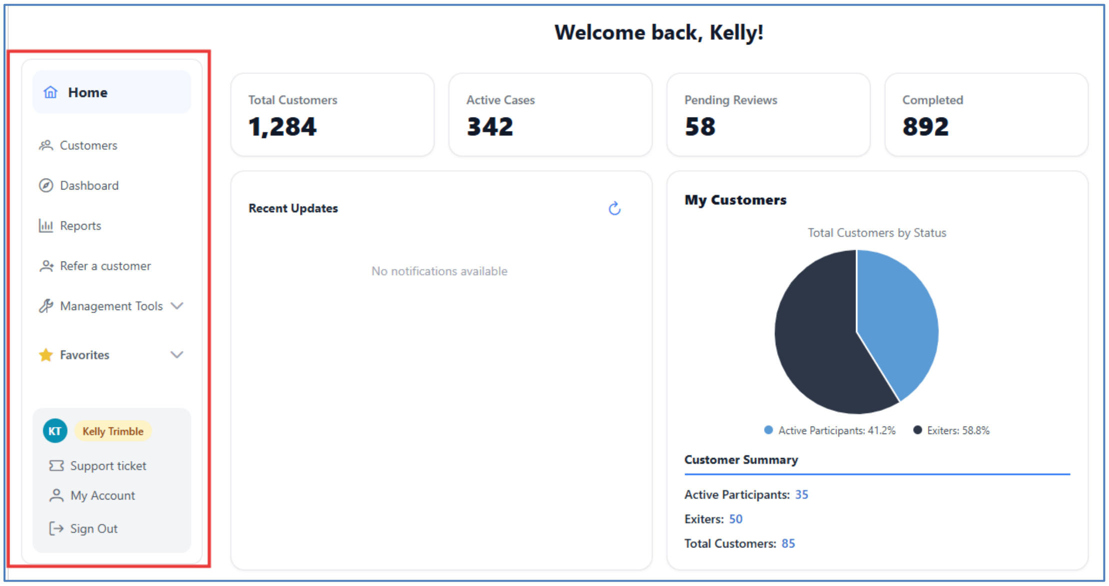
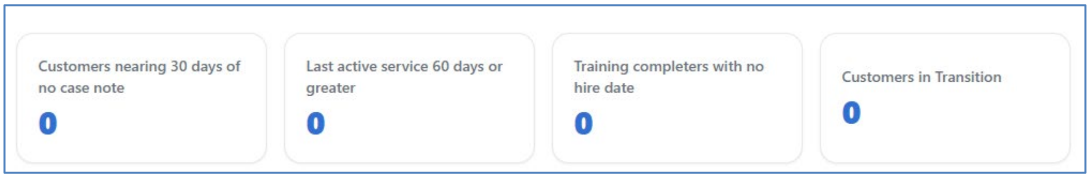
Home Page – General Overview

- The Home Page is broken into tiles with various functionality and purpose.



- **Left Side Bar** – This tile gives quick access to the top bar navigation areas and some additional shortcuts.
  - **Refer a Customer** — shortcut to initiate a referral from any screen
  - **Favorites** — bookmark frequently used pages or reports for faster access
  - **Support Ticket** — Submit a help request to the IWDS helpdesk
  - **My Account** — View your account information and role permissions
  - **Sign Out** — End your session securely

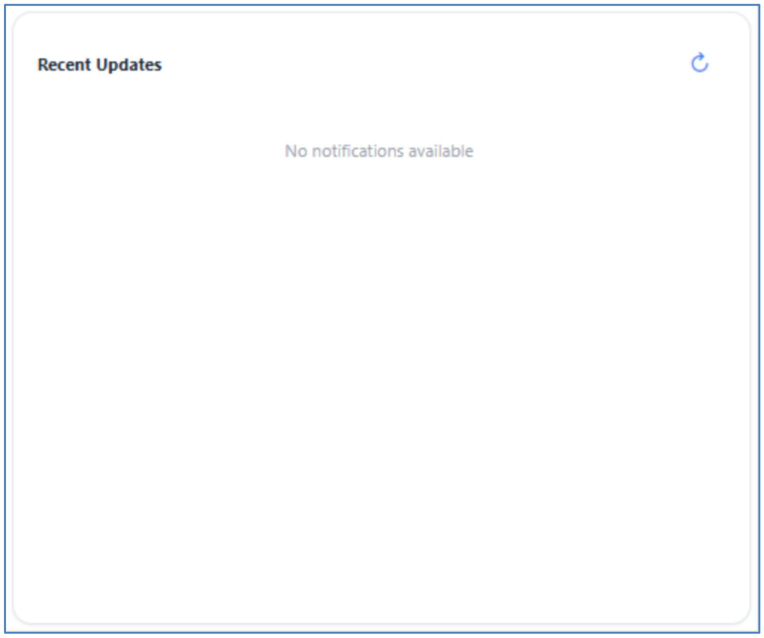
- **Action Tiles** – At the top of the page, four tiles give you an immediate read on caseload activity, scoped to the logged-in user's caseload and role. Selecting the blue number in the tile, will bring you to the customers requiring action.



  - Note – A supervisor or administrator may see different totals than a career planner.

- **Data available:**
  - Customers nearing 30 days of no contact – measures active participants with no case notes between 20-29 days. This is a proactive measure so that career planners see customers who need a case note, ensuring they continue to meet the 30-day policy.
  - Customer last active service 60 days or greater
  - Customers who have completed training, but do not have a hire date
  - Customers in transition phase – measures participants with all services closed, but not exited

- **Recent Updates Tile** – The Recent Updates panel surfaces system notifications relevant to your account. Check it at the start of each session.
    - Displays alerts and notifications that require attention
    - If no action is pending, the panel will read "No notifications available"
    - Use the refresh icon to reload the panel without refreshing the full page



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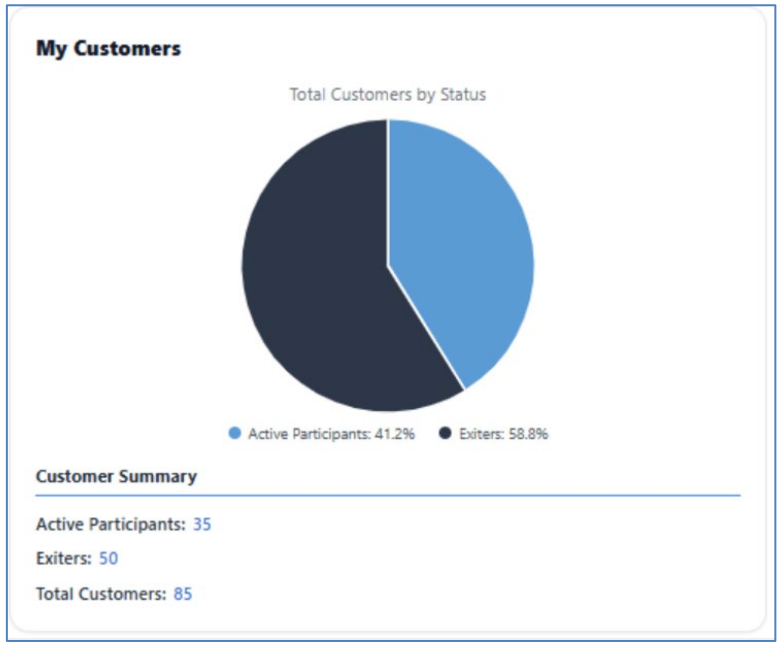
- **My Customers Tile** – This tile shows a pie chart showing a customer breakdown split between Active Participants and Exiters.
- A Customer Summary below the chart indicates exact counts of Active Participants, Exiters and Total Customers.
    - Selecting the blue hyperlinked number brings up the list of customers



- **Resources Tile** - The Resources panel puts commonly needed documents and tools within reach from the Home page — no searching required.

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- **"To Do" Tile** – The To Do panel is a personal task tracker built into the Home page. Use it to manage follow-up actions and reminders.
- How It Works
  - Tasks are displayed as a checklist
  - Check off a task when complete — completed items appear with strikethrough
  - Add new tasks using the + button and the text field
  - Remove tasks by clicking the grey X to the right
  - Tasks are personal to your account and not visible to others