



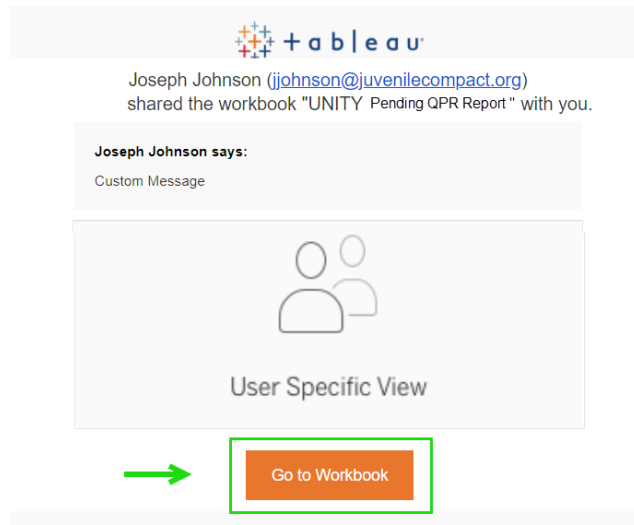
TABLEAU PENDING HE REPORT

QUICK REFERENCE GUIDE

Step 1: Open Email Invitation

Open the email invitation from [no-reply@tableau.com](mailto:reply@tableau.com).

Click on “Go to Workbook.” This will log your Tableau “Favorites” page.

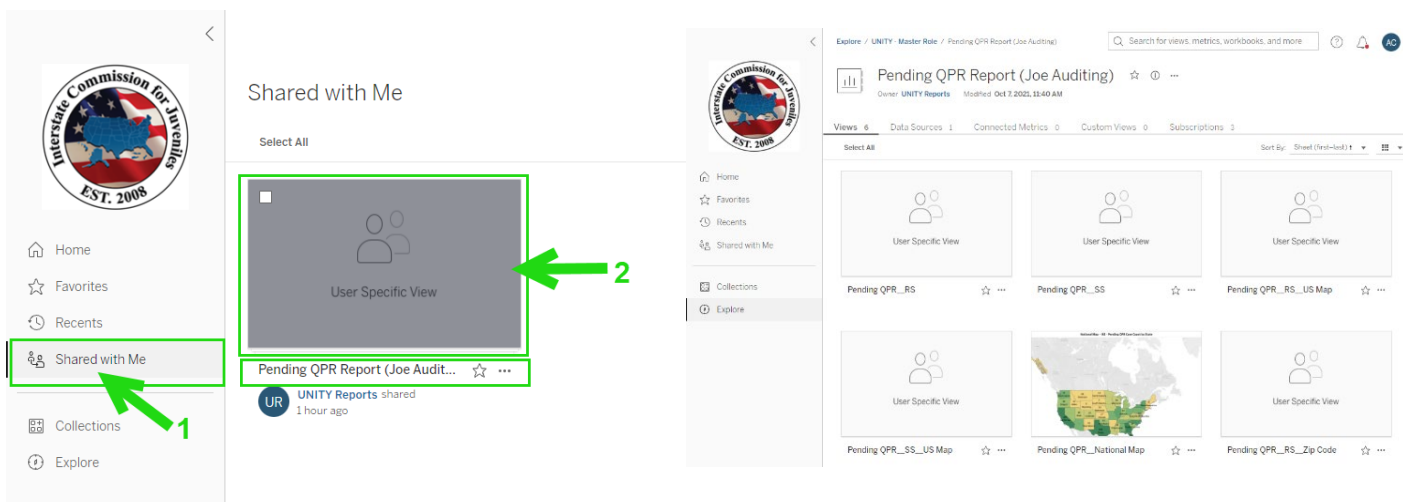


you into

Step 2: Click “Shared with Me” in Tableau

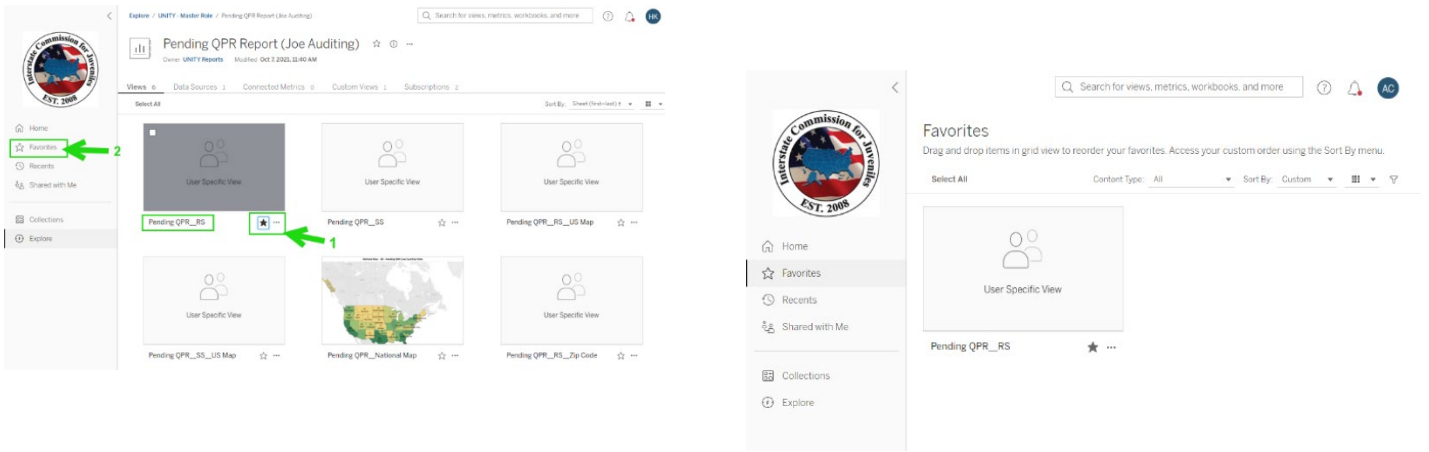
Click the shared workbook FOLDER icon associated with the **Pending HE Report**. This will open all 6 worksheets in the workbook:

- 1) Pending HE_RS, 2) Pending HE_SS, 3) Pending HE_RS_US Map, 4) Pending HE_SS_US Map, 5) Pending HE_National Map, 6) Pending HE_RS_Zip Code



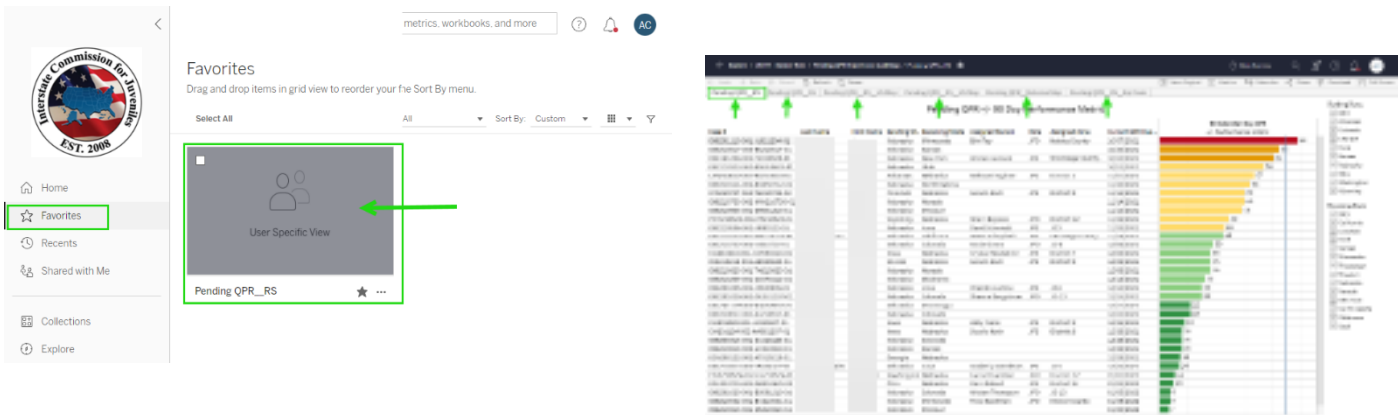
Step 3: Click the STAR on the Pending HE_RS Worksheet

This will add this workbook/worksheet report to your favorites. Next, click “Favorites” in the navigation. This will open your Favorites and present the Pending HE_RS report.



Step 4: Click the shared workbook FOLDER icon associated with the Pending HE_RS report

This will open your 6 worksheets with the Pending HE_RS as sheet (tab) 1.



Step 5: Configure 5 of the 6 reports and save your settings

Pending HE +/- 45 Day Performance Metric:

1. Click on the “Pending HE_RS” worksheet – Tab 1.
2. In the “Receiving State” column, deselect “All” and select your state only.

Case #	Last Name	First Name	Supervision	Sending State	Receiving State	Assigned Person	Role	Assigned Zone	Home Evaluation Due	45 Calendar Day HE +/- Performance Metric
CVA210922-002-BP210914-01			Probation	Virginia	North Carolina	Christopher	JPS	District 6	11/12/2021	42
CVA211013-001-DW211013-01			Probation	Virginia	North Carolina	Christopher	JPS	District 6	11/27/2021	27
CVA210930-003-LB210930-01			Probation	Virginia	North Carolina	Antron Rice	JPO	District 26	11/28/2021	26
CDC211021-001-FL211012-01			Probation	District of Col.	North Carolina	Scott Herrera	JPS	District 13	12/02/2021	22
CSC211020-001-MA211020-01			Probation	South Carolina	North Carolina	Keyshorn Smith	JPO	District 22	12/04/2021	20
CGA211021-001-JF211001-01			Parole	Georgia	North Carolina	Michelle Bennett	JPS	District 11	12/05/2021	19
CSC210927-001-BS210927-01			Probation	South Carolina	North Carolina	Shakteria Lindsey	JPS	District 28	12/10/2021	14
CNJ211026-001-TB211026-01			Probation	New Jersey	North Carolina	Christon Spence	JPS	District 27	12/10/2021	14
CSC211021-001-BP211021-01			Probation	South Carolina	North Carolina	Francesca Lattie	JPS	District 16	12/11/2021	13
CVA211104-003-EM211104-01			Probation	Virginia	North Carolina	Antron Rice	JPO	District 26	12/19/2021	5
CVA211104-002-BM211104-01			Probation	Virginia	North Carolina	Kimberly Wynn	JPS	District 19	12/19/2021	5
FL211104-001-CD210804-01			Probation	Florida	North Carolina	Marsha Rogge	JPS	District 13	12/19/2021	5

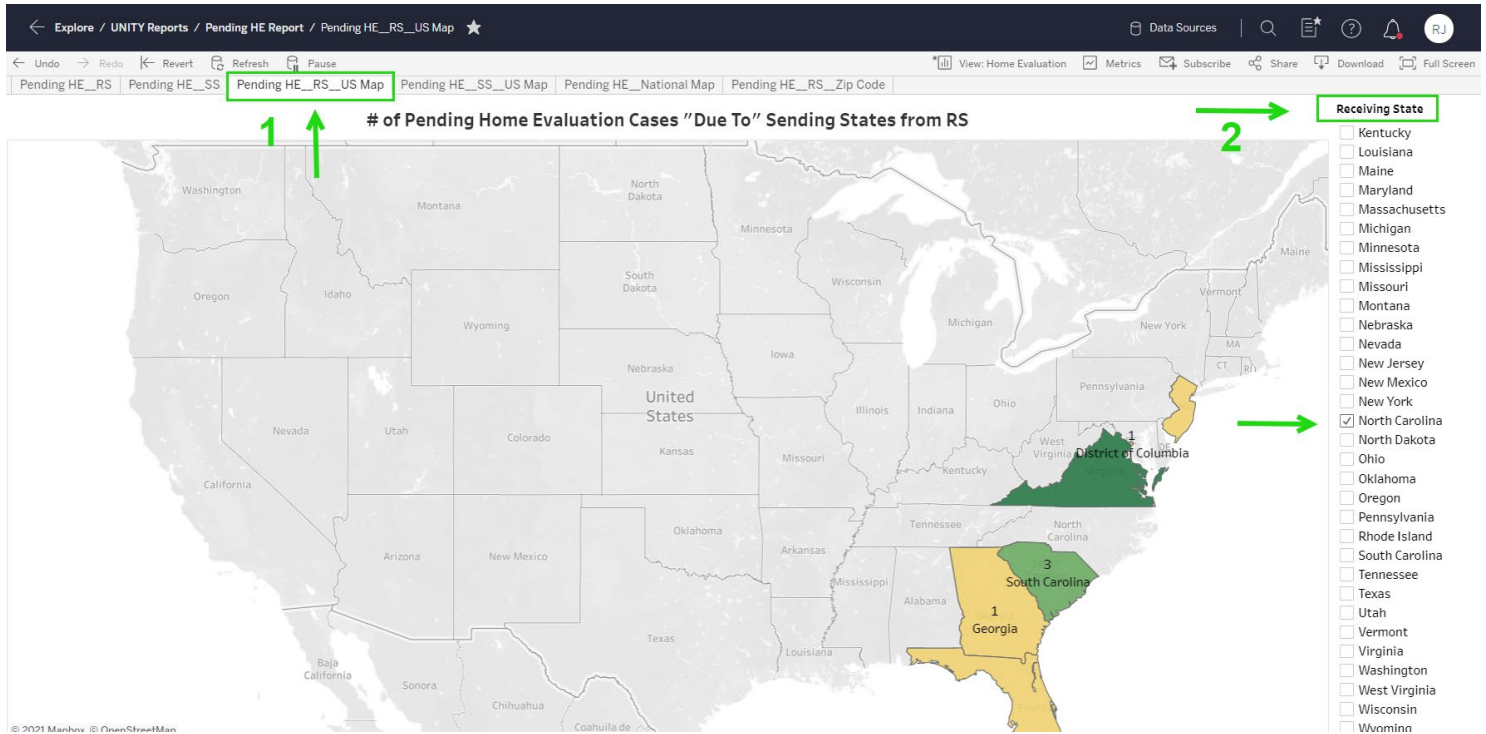
Pending HEs Due To Sending State:

1. Click on the “Pending HE_SS” worksheet – Tab 2.
2. In the “Sending State” column, deselect “All” and select your state only.

Case #	Last Name	First Name	Supervision	Sending State	Receiving State	Home Evaluation Due	45 Calendar Day HE +/- Performance Metric
CNC211014-002-JM211013-01			Probation	North Carolina	South Carolina	12/02/2021	22
CNC211014-001-DM211013-02			Probation	North Carolina	South Carolina	12/02/2021	22
CNC210930-001-JL210930-01			Probation	North Carolina	Tennessee	12/10/2021	14
CNC211028-001-DC061201-01			Probation	North Carolina	Arizona	12/17/2021	7
CNC211015-002-AT210811-01			Probation	North Carolina	Florida	12/18/2021	6

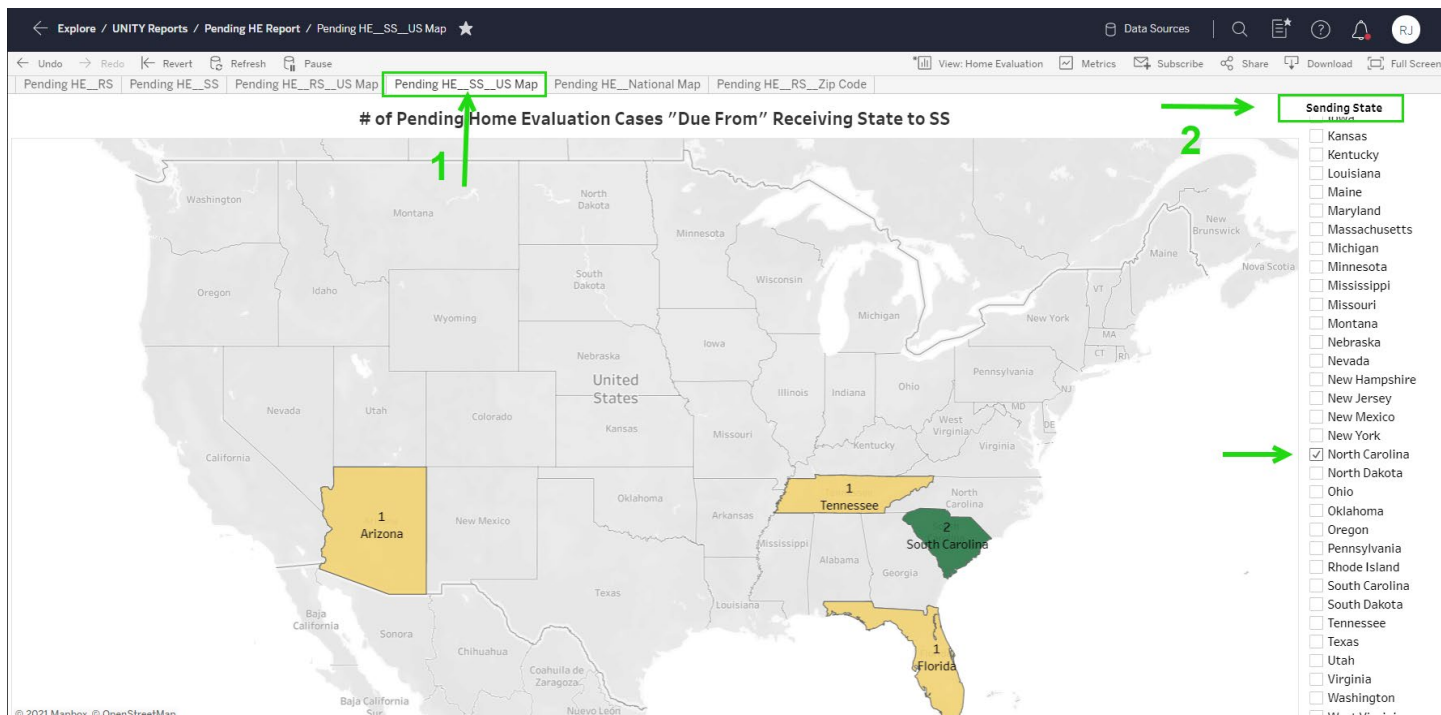
of Pending HE Cases "Due To" Sending States:

1. Click on the "Pending HE_RS_US Map" worksheet – Tab 3.
2. In the "Receiving State" column, deselect "All" and select your state only.



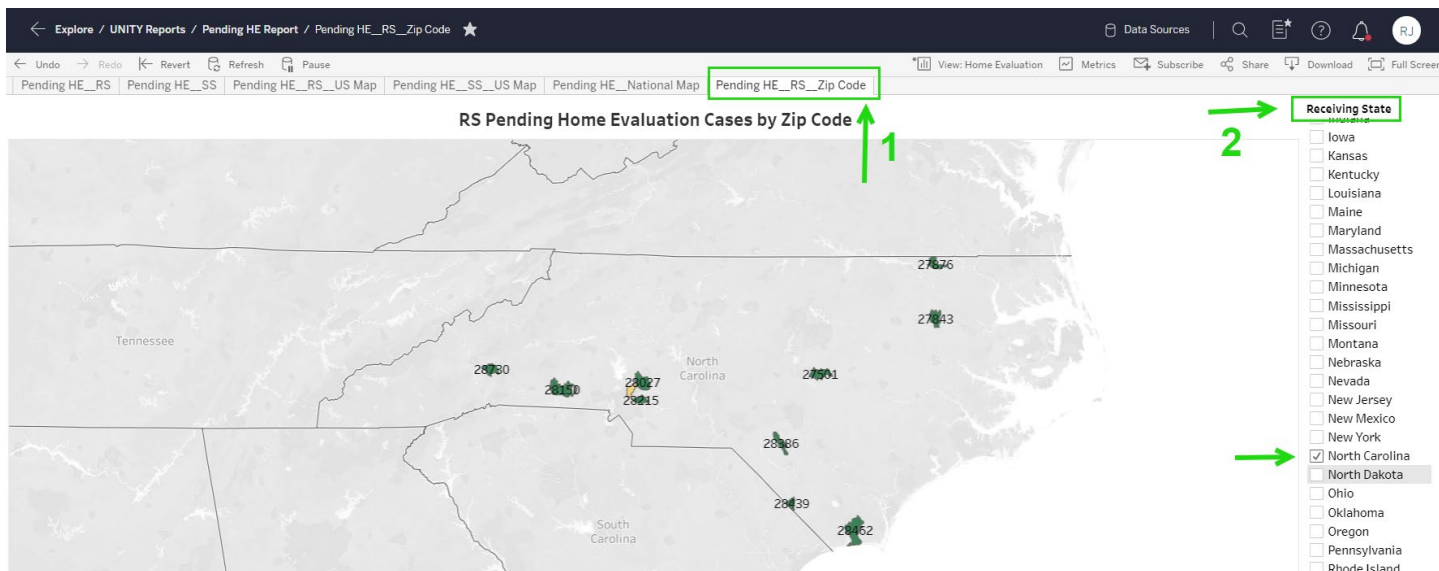
of Pending HE Cases “Due From” Receiving State to SS:

1. Click on the “Pending HE_SS_US Map” worksheet – Tab 4.
2. In the “Sending State” column, deselect “All” and select your state only.



RS Pending HE Cases by Zip Code:

1. Click on the “Pending HE_RS_Zip Code” worksheet – Tab 6.
2. In the “Receiving State” column, deselect “All” and select your state only.



Step 6: Save your report configuration settings

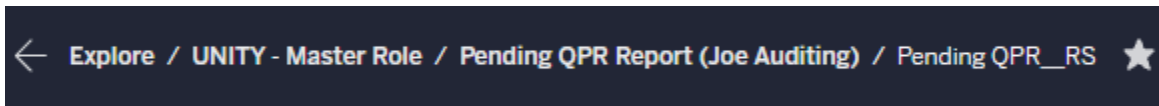
1. Click back to the first report tab: Pending HE_RS.
2. Select “View Original” in the navigation menu. This will open the “Save Custom View” window.
3. Name the view “Pending HE Report.”
4. Check the checkbox to “Make it my default.”
5. Click the SAVE button.

The screenshot displays the UNITY Reports interface for a report titled "Pending Home Evaluation +/- 45 Day Performance Metric". The interface includes a navigation menu at the top with tabs for "Pending HE_RS", "Pending HE_SS", and various maps. A "View Original" button is highlighted in green. A "Save Custom View" dialog box is open, with fields for "Name this view" (containing "Home Evaluation") and a checked "Make it my default" checkbox. A "Save" button is also highlighted in green. Red arrows and numbers 1 through 5 indicate the steps described in the text.

Case #	Last Name	First Name	Supervision ...	Sending State	Receiving State	Assigned Person	Role	Assigned Zone	Home Evaluation Due.	45 Calendar Day HE +/- Performance Metric
CVA210922-002-BP210914-01			Probation	Virginia	North Carolina	Christopher	IP	District 6	11/12/2021	42
CVA211013-001-DW211013-01			Probation	Virginia	North Carolina	Christopher	IP	District 6	11/12/2021	27
CVA210930-003-LB210930-01			Probation	Virginia	North Carolina	Christopher	IP	District 6	11/12/2021	26
CDC211012-001-FL211012-01			Probation	District of Col.	North Carolina	Christopher	IP	District 6	11/12/2021	22
CSC211020-001-MA211020-01			Probation	South Carolina	North Carolina	Christopher	IP	District 6	11/12/2021	20
CGA211021-001-JF211001-01			Parole	Georgia	North Carolina	Christopher	IP	District 6	11/12/2021	19
CSC210927-001-BS210927-01			Probation	South Carolina	North Carolina	Christopher	IP	District 6	11/12/2021	14
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CVA211104-003-EM211104-01			Probation	Virginia	North Carolina	Christopher	IP	District 6	11/12/2021	5
CVA211104-002-BM211104-01			Probation	Virginia	North Carolina	Christopher	IP	District 6	11/12/2021	5
CFL211104-001-CD210804-01			Probation	Florida	North Carolina	Christopher	IP	District 6	11/12/2021	5

Tableau Navigation & Functions

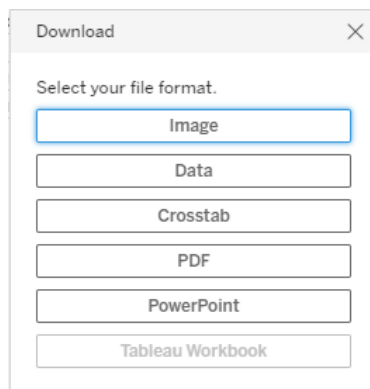
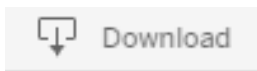
Navigation Breadcrumbs: Click on links to exit to the main Tableau navigation



Full Screen: Click “Full Screen” to view the report in full screen view.



Download: Click “Download” to select 1 of 5 download options to your download folder.



Subscribe: Click “Subscribe” to have the report auto-emailed to your inbox on a defined schedule. Review all windows settings when configuring. Recommendation: Set the “At” time for 3:00 AM or early morning)

