UNITY Tableau Report Video Script

Video located at

Tableau is the platform that contains all UNITY-related reports for compact offices.

To access the Tableau report site, first login to UNITY.

On the left-hand navigation pane, select Reports, then click Dashboard.

The Tableau report site will open in a new browser tab.

Enter your email address and your password. If you need assistance with logging in, please submit a ticket to support@juvenilecompact.org

When the site loads, you'll be on the Favorites page. If this is your first time to login to Tableau, you won't have any reports listed in the Favorites page.

To add reports, click on Shared with Me located in the left-hand navigation pane. This will load all UNITY Tableau reports that you have access to.

On the Shared with Me page, locate the Pending Home Evaluation and Pending Quarterly Progress Reports. Click the Star icon to add these to your Favorites page. Now, every time you login to Tableau you'll see your favorite reports listed for quick access.

For this video, we'll demonstrate how to review the Pending QPR and Home Evaluation Reports.

Let's start with the Pending QPR Report.

Each report has multiple sheets, but for this video we're going to focus on the reported titled "QPRs Due to Sending State."

When you click into this report, you'll see case detail for all active Transfer of Supervision cases, including the juvenile's first and last name, Supervision Status, Sending and Receiving States, Assigned Person, which is the field officer who is supervising the case, their Role, and the Assigned Zone. If these three columns are empty, it's because the data hasn't been built into UNITY through Zone structuring. Finally, the zip code where the juvenile is residing in the receiving state is listed, along with the QPR due date.

The last column shows the performance metric, or how many days it has been since the home evaluation was completed or the last QPR was submitted. If the column is red, the QPR is overdue.

Let's take a closer look at one case. This QPR shows a due date of 1/11/2023. The Performance Metric column shows 126 days, meaning that it has been 126 days since the home evaluation was completed or since the last QPR was sent. Because QPRs are due every 90 days, this QPR is overdue by 36 days. When the QPR is submitted, the case will fall to the bottom of the list.

Any QPRs that are not yet overdue will have either orange, yellow, or green performance metric indicator color bars showing that they are not yet overdue.

For any case, click on the juvenile's name to open the case in UNITY. From here, you can view the task, including the due date and the number of days overdue. To complete the report, click the blue plus sign icons and work through the UNITY tasks to submit the QPR to the sending state. You may also assign the case to the field officer if they are a UNITY user by clicking on the blue bar of the Quarterly Progress Report task header, and the Assigned To edit icon.

Now we'll take a look at the Pending Home Evaluation report. This report also contains multiple sheets, but for now we'll focus on the Home Evaluations Due to the Sending State sheet.

This report shows the same column data as the Pending QPR report.

The performance metric column for this report will show a red bar for any reports that exceed 45 calendar days.

As you scroll down the report, you can see that home evaluations that are not yet due have orange, yellow, or green bars.

To review an overdue case, click on the juvenile's name. The case will open in UNITY.

Review the task that is overdue. Follow-up with the assigned field officer or UNITY User. To assign the task to a UNITY user, locate the Assigned to edit icon in the blue Home Evaluation Task row header. Use this assign the case to a UNITY user.