

# Instructions on using Results Scorecard

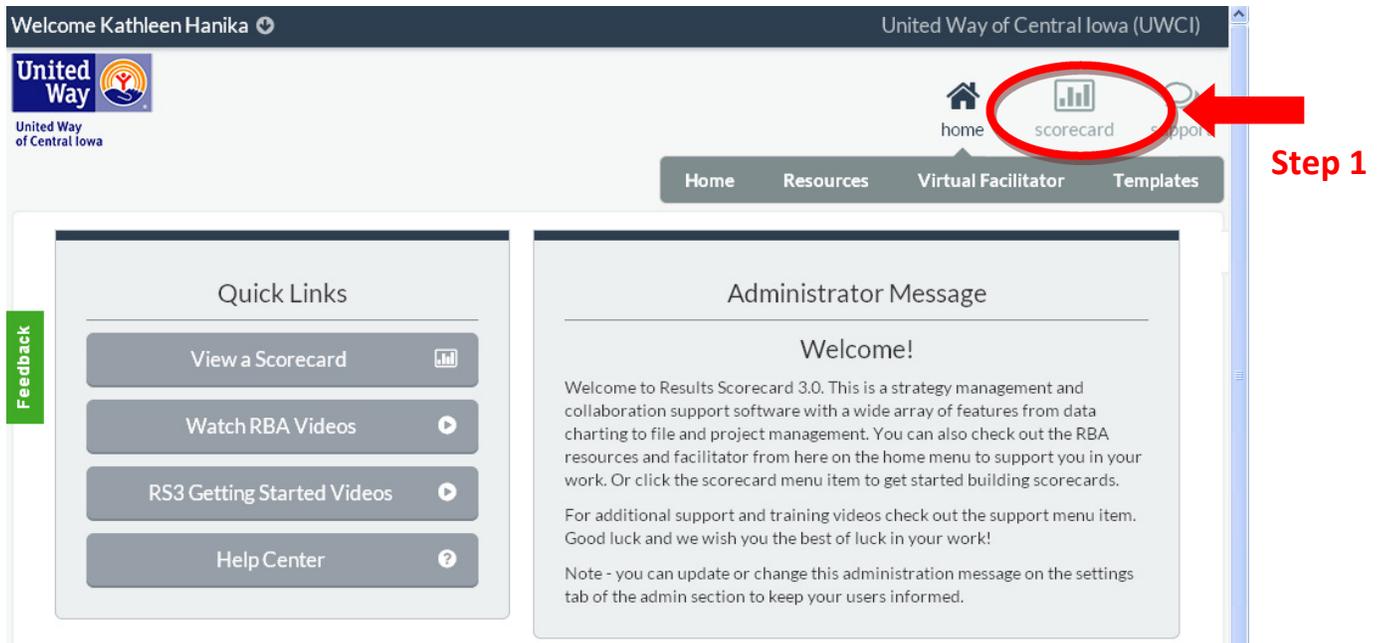
## 1. Login:

<https://app.resultsscorecard.com>

If you forget your password, follow these instructions:

Go to the login page, enter their username/login and then select "forgot password". It will reset and send a new password to the user's email. It will be from [HostedServices@resultsscorecard.com](mailto:HostedServices@resultsscorecard.com) (check "junk mail" if not in regular mail)

## 2. Adding Data



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Home Resources Virtual Facilitator Templates

Quick Links

- View a Scorecard
- Watch RBA Videos
- RS3 Getting Started Videos
- Help Center

Administrator Message

Welcome!

Welcome to Results Scorecard 3.0. This is a strategy management and collaboration support software with a wide array of features from data charting to file and project management. You can also check out the RBA resources and facilitator from here on the home menu to support you in your work. Or click the scorecard menu item to get started building scorecards.

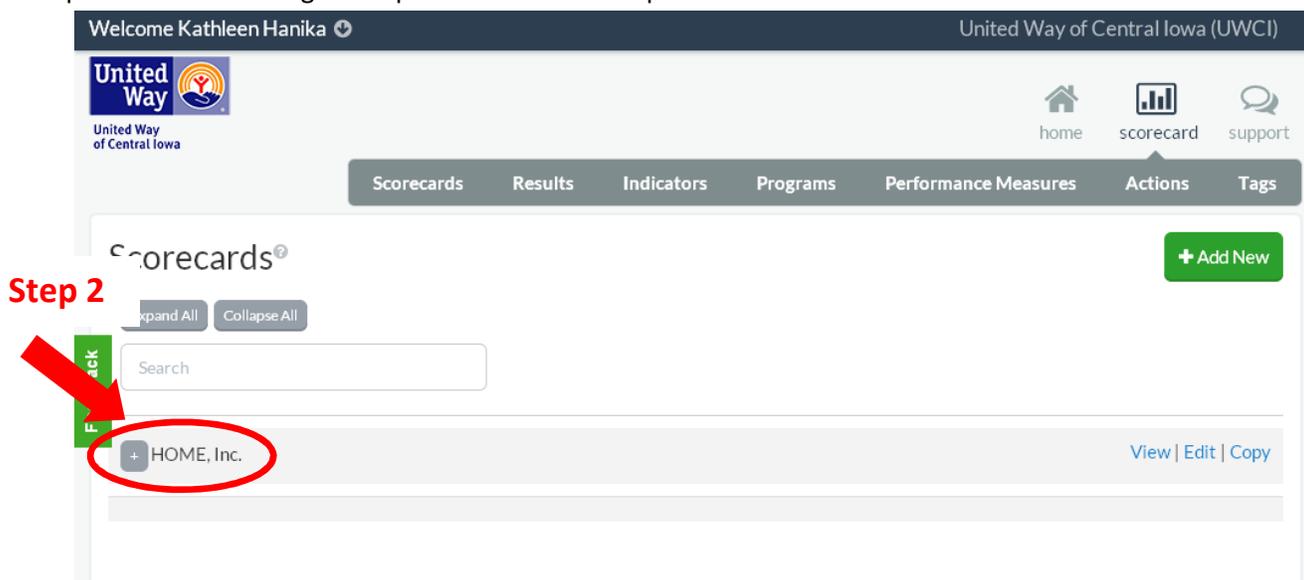
For additional support and training videos check out the support menu item. Good luck and we wish you the best of luck in your work!

Note - you can update or change this administration message on the settings tab of the admin section to keep your users informed.

**Step 1**

Step 1: Click on the Scorecard logo to bring up your scorecard options.

Step 2: Click on the + sign to expand the scorecard options



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Scorecards Results Indicators Programs Performance Measures Actions Tags

Scorecards<sup>9</sup> + Add New

Expand All Collapse All

Search

+ HOME, Inc. View | Edit | Copy

**Step 2**

Step 3: Click on program name where you plan to add data.

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Scorecards | Results | Indicators | Programs | Performance Measures | Actions | Tags

Scorecards + Add New

Expand All | Collapse All

Search

HOME, Inc. [View](#) | [Edit](#) | [Copy](#)

**Home, Inc.: Community Housing Services Program** [View](#) | [Edit](#) | [Copy](#)

Stable Families [View](#) | [Edit](#) | [Copy](#)

Feedback

Step 4: Scroll down on the page to find the program performance measures. Click on the words of the performance measure you want to update

P P-HI: CHSP HOME, Inc.: CHSP: Community Housing Services Program

			Time Period	Actual Value	Current Trend
+ PM	P-HI: CHSP	1. Number of individuals and families that receive counseling to stabilize their housing (unduplicated for the fiscal year)	FQ4 2013	787	↗ 2
+ PM	P-HI: CHSP	1. Number of human service workers and tenants that participate in Rentwise course (unduplicated for the fiscal year)	FY 2014	36	↗ 1
+ PM	P-HI: CHSP	1. Number of families that participate in integrated services to obtain, improve or stabilize their housing	-	-	-
+ PM	P-HI: CHSP	3. Better off: Number of homeless households who have improved their housing situation to permanent housing	FQ4 2013	0	↘ 1
+ PM	P-HI: CHSP	3. Number of individuals and families receiving counseling (unduplicated for the fiscal year)	FQ4 2013	717	↗ 2
+ PM	P-HI: CHSP	3. Number of human service workers and tenants that complete and receive "Rentwise Certificate" (unduplicated for the fiscal year)	FY 2013	30	↗ 1
+ PM	P-HI: CHSP	3. Number of families that create a plan to eliminate barriers in obtaining, improving or stabilizing their housing (unduplicated for the fiscal year)	FQ4 2013	27	↘ 2
+ PM	P-HI: CHSP	3. Number of individuals and families that found the counseling helpful in stabilizing their housing	-	-	-

Feedback

Step 5: Hold cursor over small blue box until larger blue box opens below and click on “edit”

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HOME, Inc.: CHSP: Community Housing Services Program

PM P-HI: CHSP 1. Number of human service workers and tenants that participate in Rentwise course (unduplicated for the fiscal year)

Feedback

1. Number of human service workers and tenants that participate in Rentwise course (unduplicated for the fiscal year)

Fiscal Year	Value
2013	32
2014	25
2015	1

Context Menu:

- Edit
- Turn the Curve Tutorial
- View Related
- Export as PDF
- Export Data Values
- Go Back

Step 5

Step 6: When this screen comes up, click “data”.

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Editing » 1. Number of human service workers and tenants that participate in Rentwise course (unduplicated for the fiscal year)

Cancel Save

Feedback

General **Data** Relationships Notes Files

Name: 1. Number of human service workers and tenants that participate in Rentwise course (

Tags: P-HI: CHSP Add Tag

Frequency: Fiscal Year | Change Frequency

Polarity: No Polarity

Unit of Measure:   Display before?

Decimals (0-6): 0

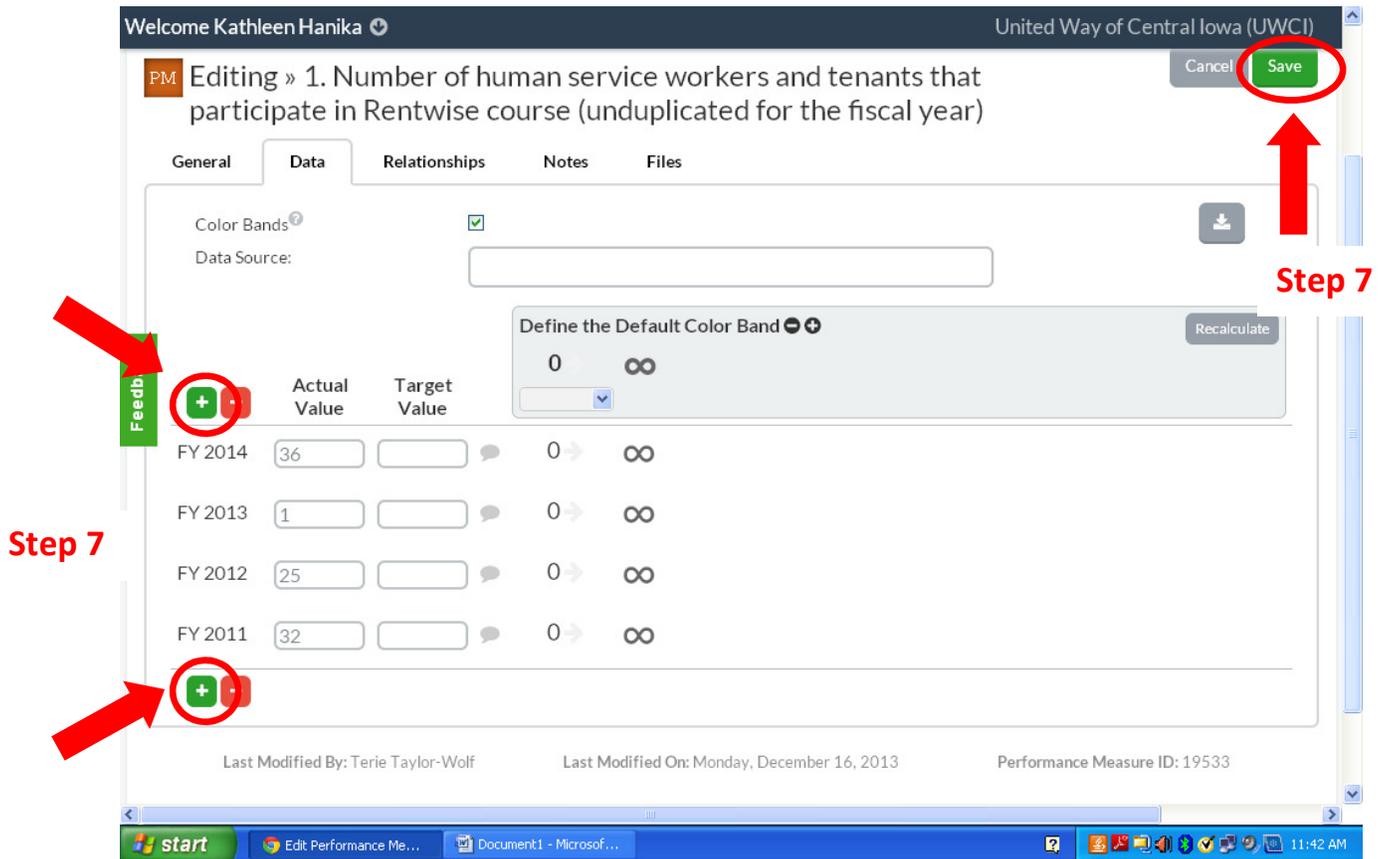
Calculation Type: Not Calculated | Change Calculation

Aggregation Type: Sum

Step 6

Step 7: Click on the + sign to add more time periods. The one at the top adds the next one by date, the one at the bottom adds the previous one by date. Put data value in the “Actual Value” box. Then click “Save” to save your data. **WARNING: If you click on – it will delete the time period and your data.** Leave target value empty. UWCI will put in where needed.

**Do not add numerical values to the performance measures that begin with “Percent”,** those have a formula associated with them so when you enter the number data in other performance measures, the “Percent” performance measure will change. **Except counseling programs will need to enter the percentage numbers.**



Congratulations! You have added your data to your scorecard.

3. Adding Narrative to the “Percent” performance measure(s).

Click on “Percent” performance measure(s) to get a screen like below and scroll down until you see the boxes for “Story Behind the Curve,” “Partner,” “What Works,” and “Action Plan”

Click on the pencil figure to open the writing area. When finished, save by clicking on far right symbol of save (see next page for location).

Do the same for all four areas.



HOME, Inc.: CHSP: Community Housing Services Program

1. Number of human service workers and tenants that participate in Rentwise course (unduplicated for the fiscal year)



Show Data Values

Story Behind the Curve



Partners

What Works

Action Plan

Specific Actions

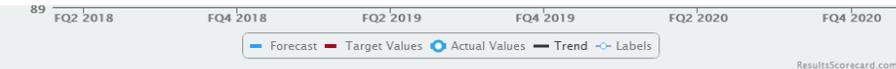
New Action Existing Action

File Attachments

+ Upload Files

File Name

Click pencil symbol to write or paste



Show Data Values

Story Behind the Curve



Rich text editor toolbar with icons for bold, italic, text color, background color, link, unlink, list, indent, outdent, undo, redo, and other editing functions.

Partners

Click far right symbol to save

#### 4. Updating Program information

You will need to review and edit or answer the following questions of your program:

1. What We Do
2. Who We Serve
3. How We Impact
4. Success Story

You will find these areas by clicking on the program name

	Time Period	Actual Value	Current Trend
<b>HOME, Inc.: CHSP: Community Housing Services Program</b>			
1. Number of individuals and families that receive counseling to stabilize their housing (unduplicated for the fiscal year)	FQ4 2013	787	↗ 2
1. Number of human service workers and tenants that participate in Rentwise course (unduplicated for the fiscal year)	FY 2014	36	↗ 1
1. Number of families that participate in integrated services to obtain, improve or stabilize their housing	-	-	-

This screen on the next page will come up. Click on the pencil figure to open the writing area. When finished, save by clicking on far right symbol of save.

Scroll down and do the same for all four areas.

At the very bottom, you will find an upload button, that is where you upload your completed "Success Story and Photo Release Form" (see next page).

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**HOME, Inc.: CHSP: Community Housing Services Program**

**What We Do**

The purpose of the Community Housing Services Program (CHSP) is to assist low income households in Central Iowa stabilize their housing situations. To this end, HOME, Inc. provides housing counseling, case management and supportive services to enable people to obtain and retain housing; education to help people prevent housing problems; and advocacy to improve or create affordable housing programs for low income people. HOME, Inc. provides general counseling to all segments of the housing market; tenants, landlords, homeowners and homeless people. The goal of general housing counseling is to assist

HOME inc  
Creating Housing Opportunities

Click pencil symbol to write or paste

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P P-HI: CHSP HOME, Inc.: CHSP: Community Housing Services Program

Feedback

What We Do

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Click far right symbol to save



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PM	P-HI: CHSP	3. Number of individuals and families that found the counseling helpful in stabilizing their housing	-	-	-	-	-
PM	P-HI: CHSP	3. Number of families that are screened and assisted in accessing public or private benefits to implement their housing plan	FQ4 2013	0	-	→ 11	0% →
PM	P-HI: CHSP	3. Number of families that participate in financial coaching to implement their housing plan	FHY2 2013	0	-	→ 5	0% →
PM	P-HI: CHSP	4. Percent of individuals and families that stabilize in affordable housing (unduplicated for the fiscal year)	FQ4 2013	109.8%	-	↑ 1	-98% ↓

Specific Actions

Assigned To Status Due Date

File Attachments

+ Upload Files

File Name

Home inc logo.gif

Upload Success Story and Photo Release form



Question?

For Health Programming, contact Terie Taylor-Wolf at 246-6529 or e-mail at [twolf@unitedwaydm.org](mailto:twolf@unitedwaydm.org)

For Education Programming, contact Ananda Subramanian at 246-6581 or e-mail at [asubramanian@unitedwaydm.org](mailto:asubramanian@unitedwaydm.org)

For Income Programming, contact Corinne Lambert at 246-6542 or e-mail at [clambert@unitedwaydm.org](mailto:clambert@unitedwaydm.org)

Thanks to H.O.M.E. Inc. for sharing their Results Scorecard for this instruction sheet.