NORTH CAROLINA
Local Health Department Accreditation

Organizational Administrative User Quick Start Guide for the NCLHDA Dashboard 2020

This Guide provides an overview of the main features that Organizational Administrative Users will use in the NCLHDA Dashboard. For a Guide on the main features that most users will need in the dashboard, please refer to the *General User Guide for the NCLHD Accreditation Dashboard.*

Contents

Introduction

This Guide provides an overview of the NCLHDA Dashboard for Organizational Administrative (Org Admin) Users. Each type of user in the NCLHDA Dashboard has different levels of access that affects what information they can see in the dashboard. Listed below is what the Org Admin will see on their **Main Menu**. Other users will not see the options for Users, Document Management, Categories and Settings, only Org Admin Users have access to these features.

2020 Updates

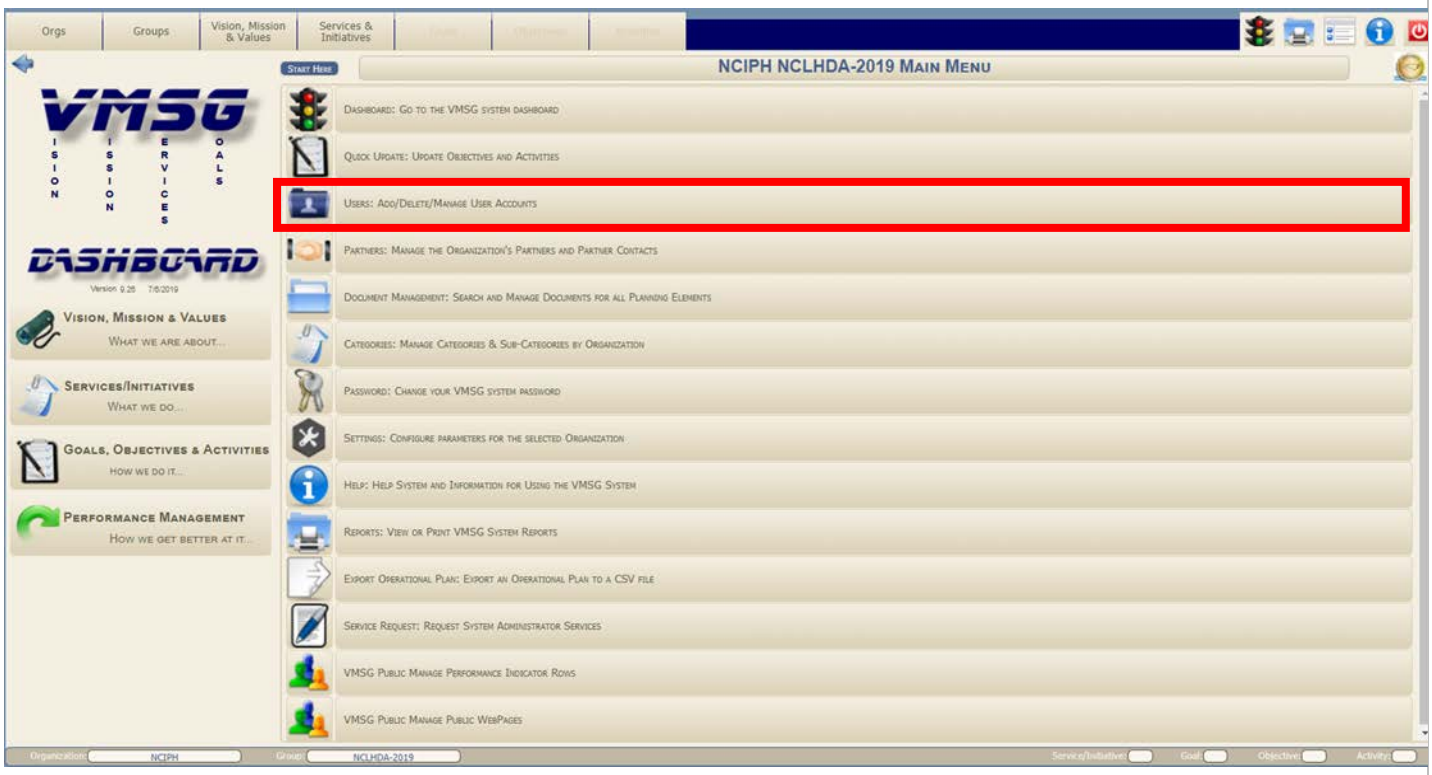
- Added the option to assign more than one Activity Lead, page 10.
- Added the option for Activity Leads and Activity Team Members to get email notifications, page 11.

Users

For a full list of the types of users and their levels of permissions in the NCLHDA Dashboard, please review the *General User Quick Start Guide for the NCLHDA Dashboard 2020*. This guide is designed for Org Admin Users, who have the highest level of access in the dashboard. Org Admin Users can add, remove and edit users in the dashboard as well as set up email notification for team members.

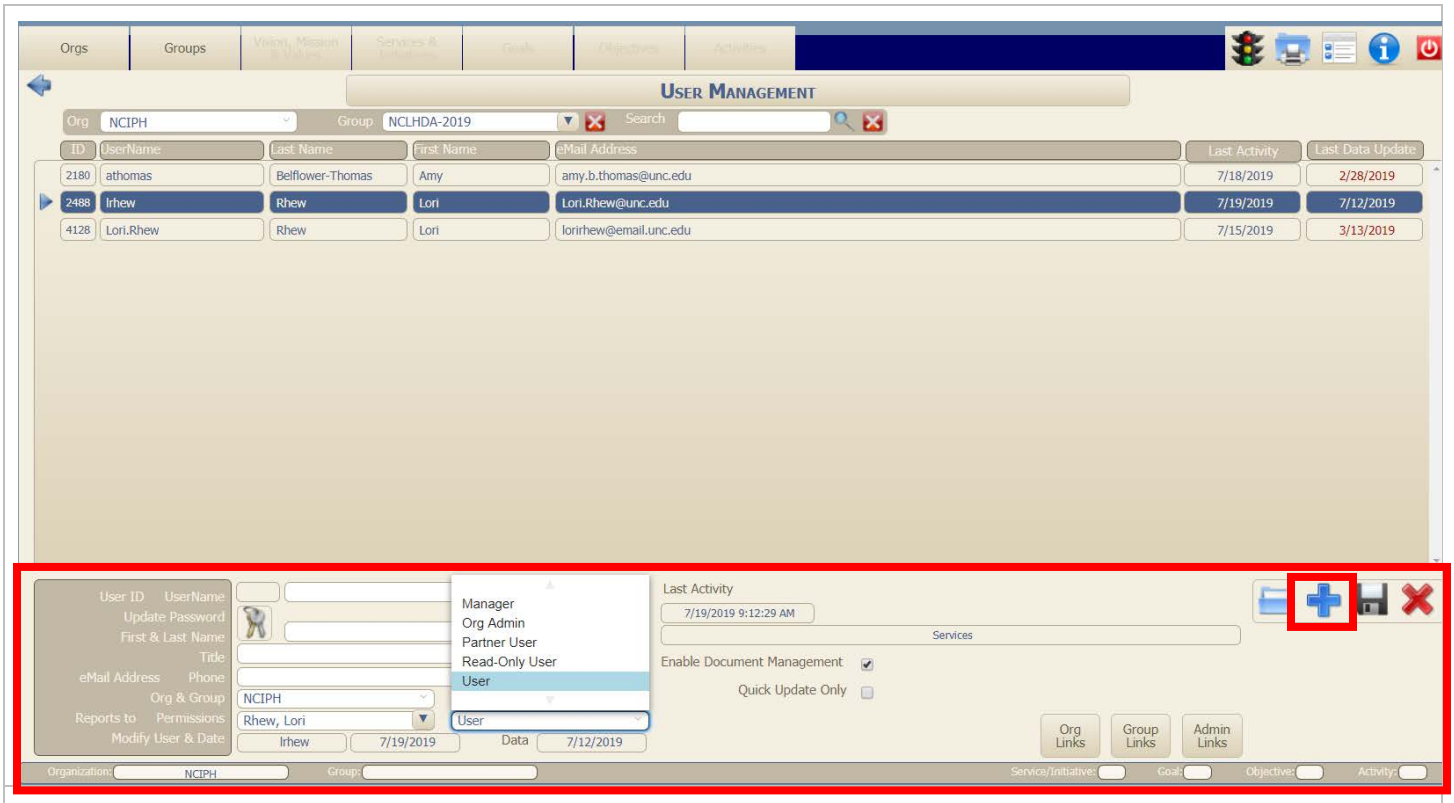
Adding Users

From the **Main Menu** select **Add/Delete/Manage User Accounts**.



To add a new user, click the blue plus sign in the bottom right hand corner of the screen.

Once the blue plus is clicked there will be a blank user box at the bottom of the screen.



Add the following information for the new user:

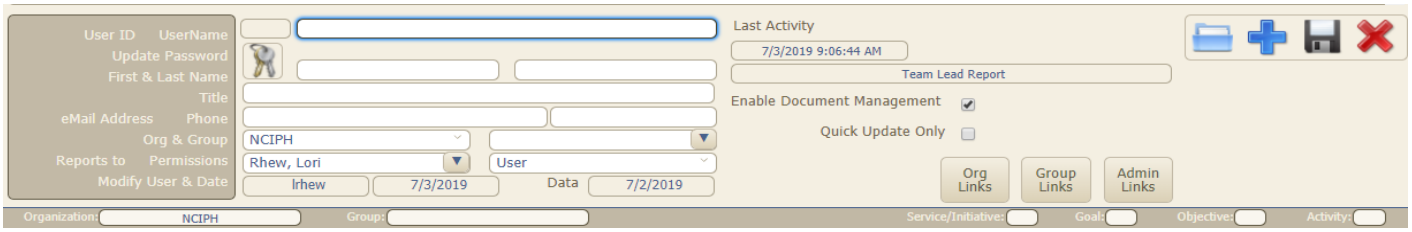
Unique username. Typical usernames are first initial and last name. The system will check for duplicate entries. No spaces are allowed.

The default password for a new user is set to a unique combination of letters, numbers and punctuation. You do not need to enter a password.

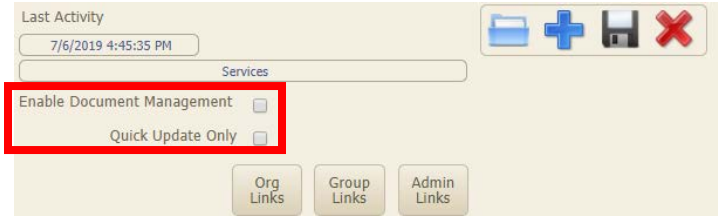
Email address.

Select the `Reports to' person from the drop-down list if not already selected.

Select Permissions from the drop-down list. See page 3 of the *General User Quick Start Guide for the NCLHDA Dashboard 2020* for a description of the different levels of permission that can be assigned to each user.



Enable Document Management: Check this box to give the user permissions to add, edit and remove documents within the Groups to which they have been given permissions.

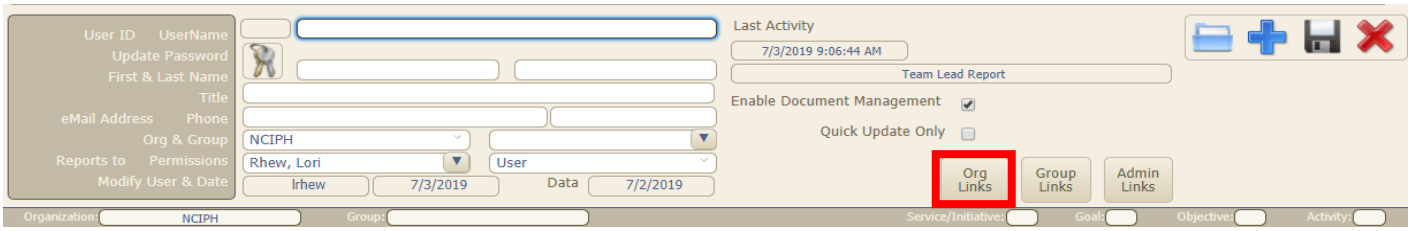


Quick Update Only: Check this box if the user is to have only permissions to update the HDSAI for the Activities they have been assigned.

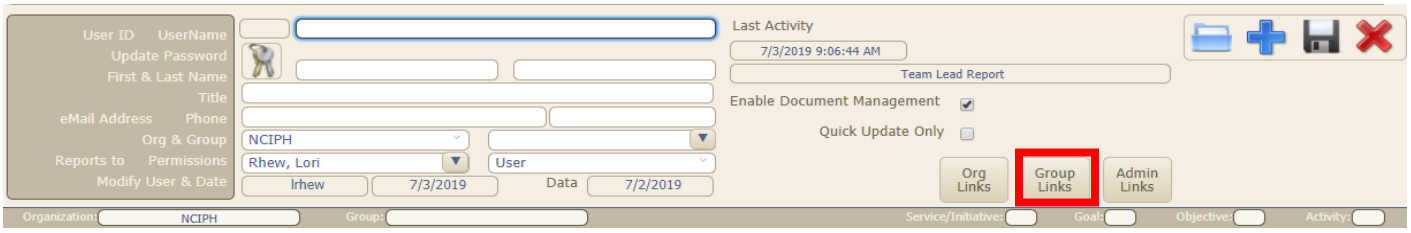
Click the Save button to add the user.

Click the **Org Links** button on the bottom right of the page. Your health department should be the only organization listed. Make sure there is a check next to your organization to ensure the new user has access.

Select the Save/Exit button.

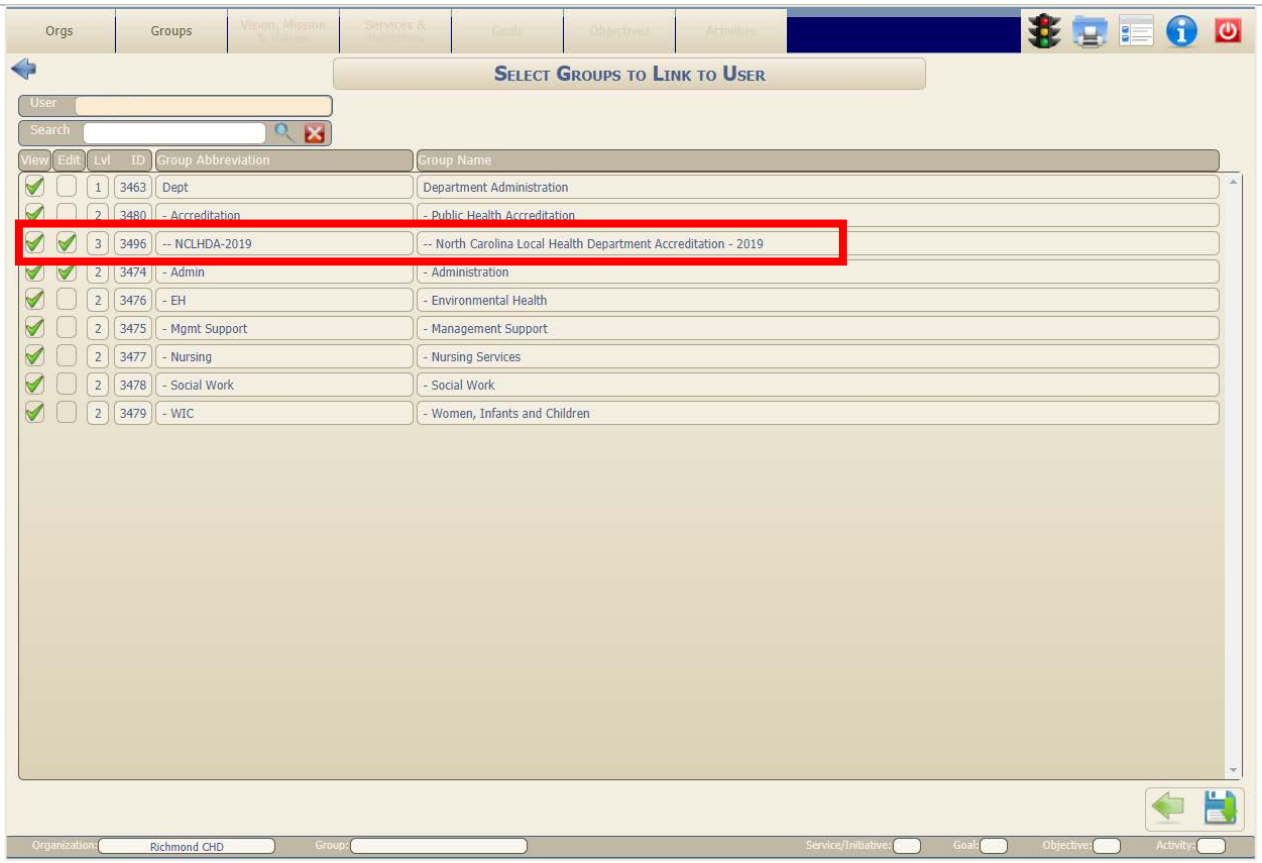


Select the user and click the **Group Links** button on the bottom right side of the page.

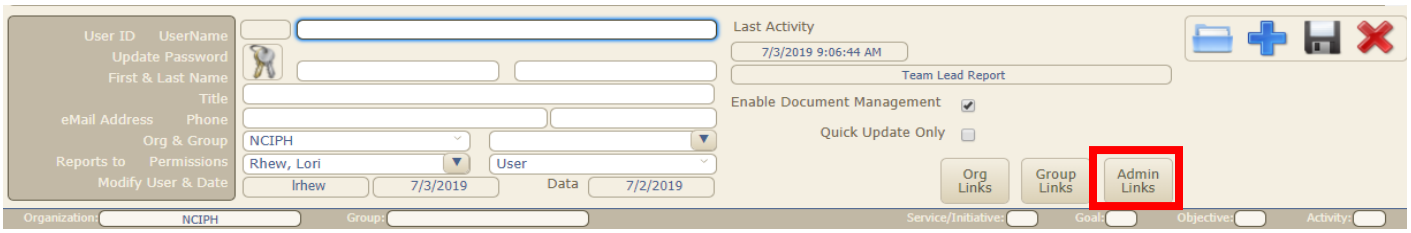


Note: the page titled **Select Groups to Link to User** will look different for every agency. The Groups are generated from the Organizational Chart that you provided when your dashboard was set up.

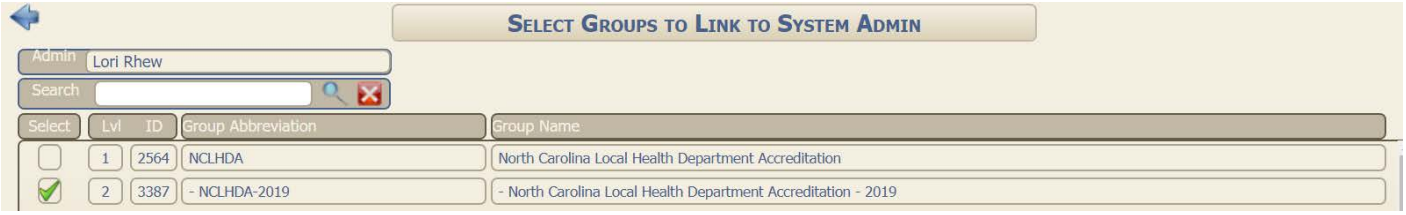
Check the **View** and **Edit** checkboxes to allow viewing and/or editing of the selected group for the specified user. Users with only `View` access can see but not edit any data. Users with `Edit` access can see and edit data for any record in the selected Group. If you want users to be able to make updates to the NCLHDA dashboard, they will need edit access to the NCLHDA-20XX Group. You will need to email NCLHDaccreditation@unc.edu and request to have your team member assigned to the NCLHDA-20XX Group.



Click the Save/Exit button when done.

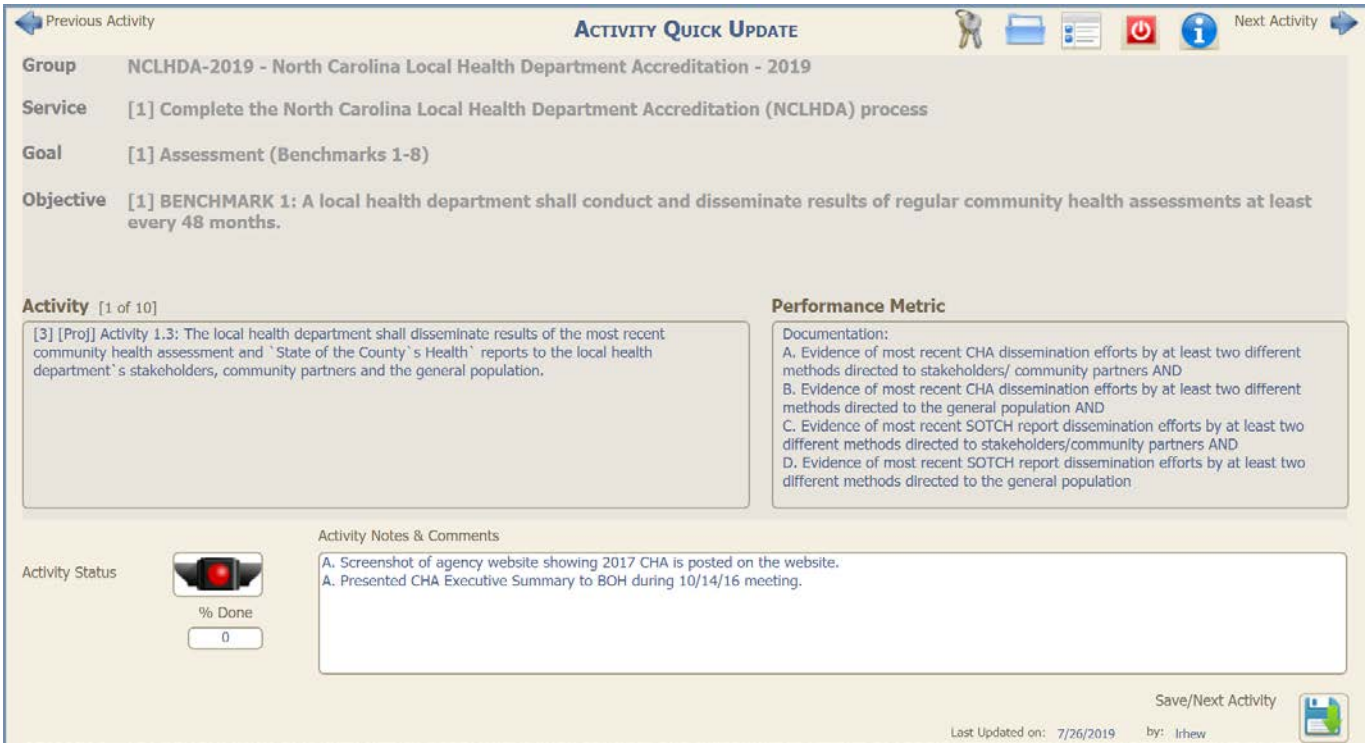


If the user will be assigned Org Admin privileges, click the **Admin Links** button. Put a check in the box next to NCLHDA – 20XX. When someone is assigned as the Admin for a group, it means that their name and email address will be included on the email notifications that team members receive, if notifications are set up. In addition, if anyone submits a service request through the main menu of the dashboard, the Admin is the person(s) that will receive the email with the request.



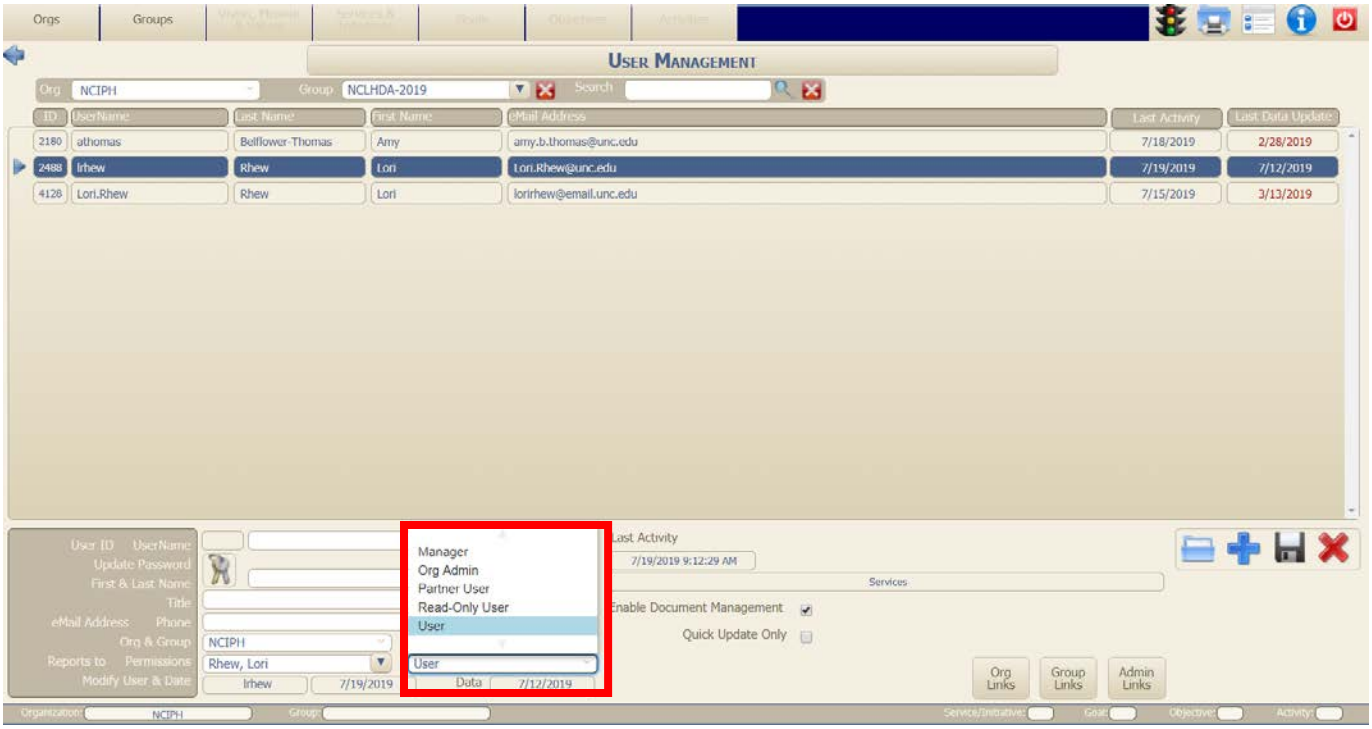
The screen below is an example of the Quick Update screen. Users with Quick Update Only access will be taken directly to the screen below for the Activities they have been assigned in the dashboard when they log in. They can add the HDSAI narrative and upload documents from this screen. They can navigate between screens using the **back arrow** to the Previous Activity and the **forward arrow** to the Next Activity at the top of the screen. And they can change their password, by clicking on the key icon

and following the prompts.



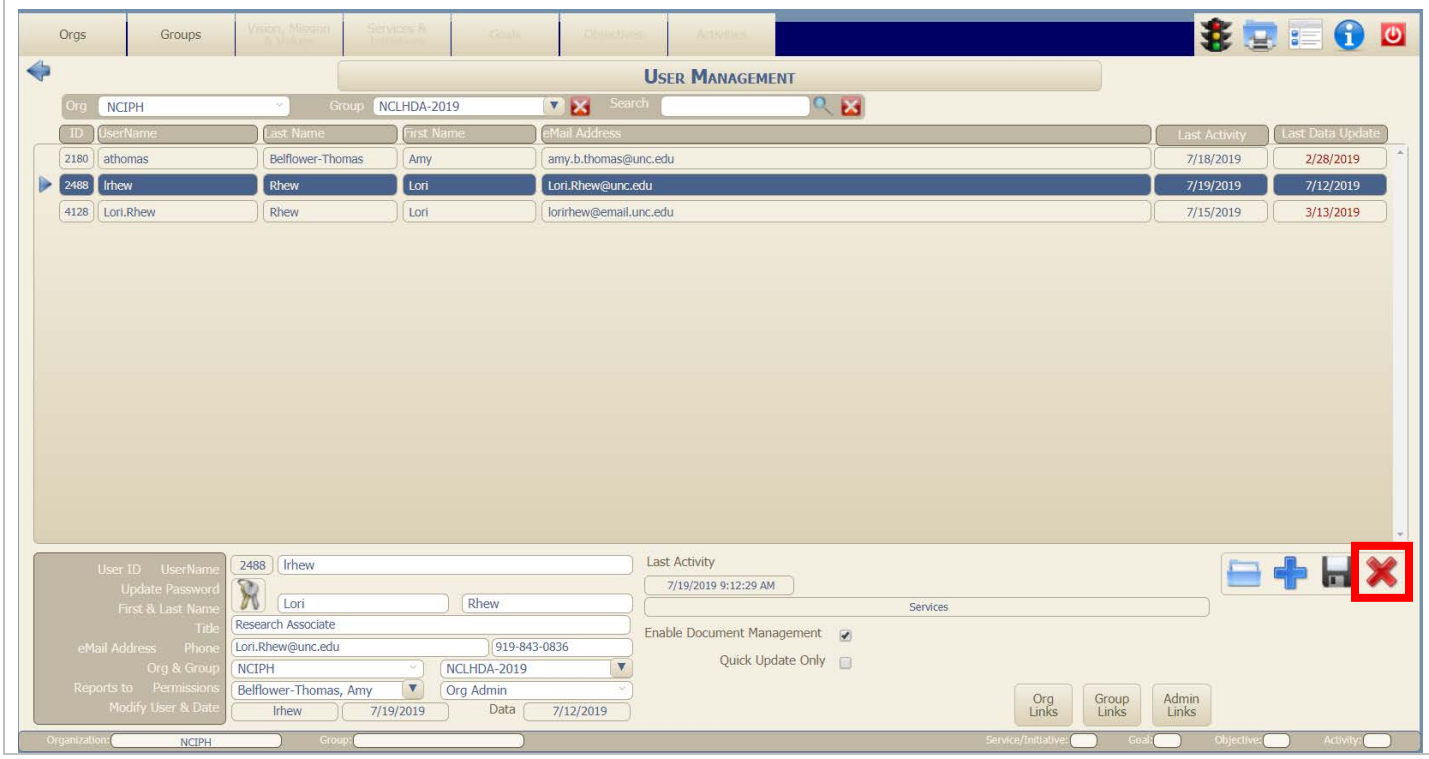
Changing User Permissions or Information

From the **Main Menu** select **Add/Delete/Manage User Accounts**. Select the users whose permissions you would like to change. Click on the **Permissions** drop box next to their name, select the new level of permission and click **Save**. To change other information, delete the previous text, add the new text and click **Save**. You can also make changes to Orgs, Groups and Admin Links.



Removing Users

From the **Main Menu**  select **Add/Delete/Manage User Accounts**  . Select the user that you would like to remove from the dashboard and click the red X  at the bottom of the page.

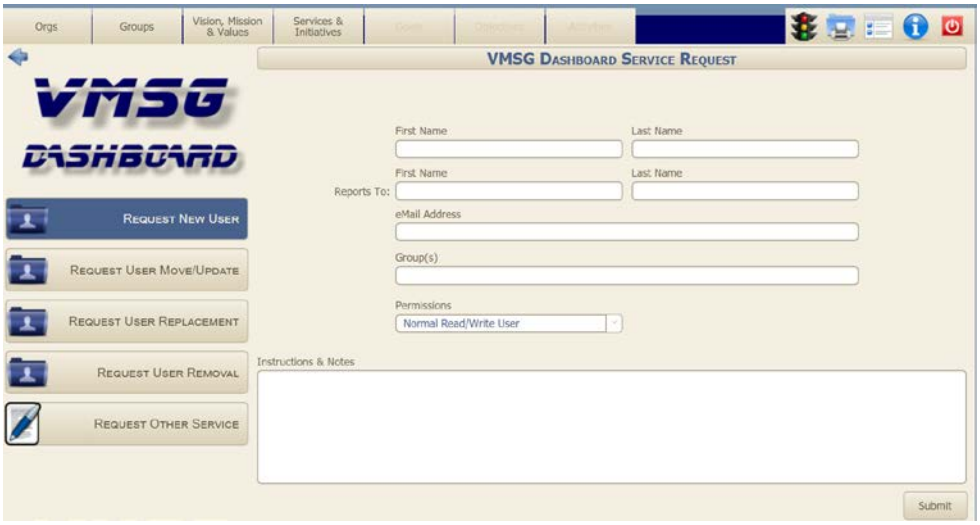


Service Request to Add New Users

If you want team members to let you know when they want to add, remove or replace a user, they can use the **Service Request: Request System Administrator Services** from the **Main Menu**.

Click the Service Request button from the **Main Menu**.

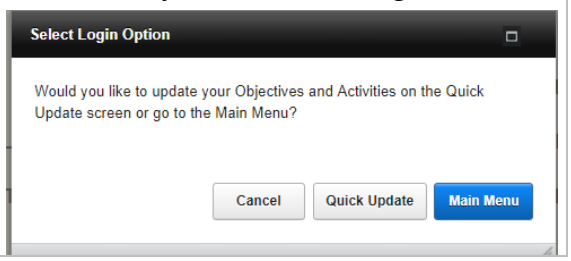
The information regarding the user will be entered in the box below. When the Submit button is clicked, the document will be sent to all the Org Admin users who have been assigned as Administrators to the Group (see page 6).



Assigning Activity Leads and Team Members

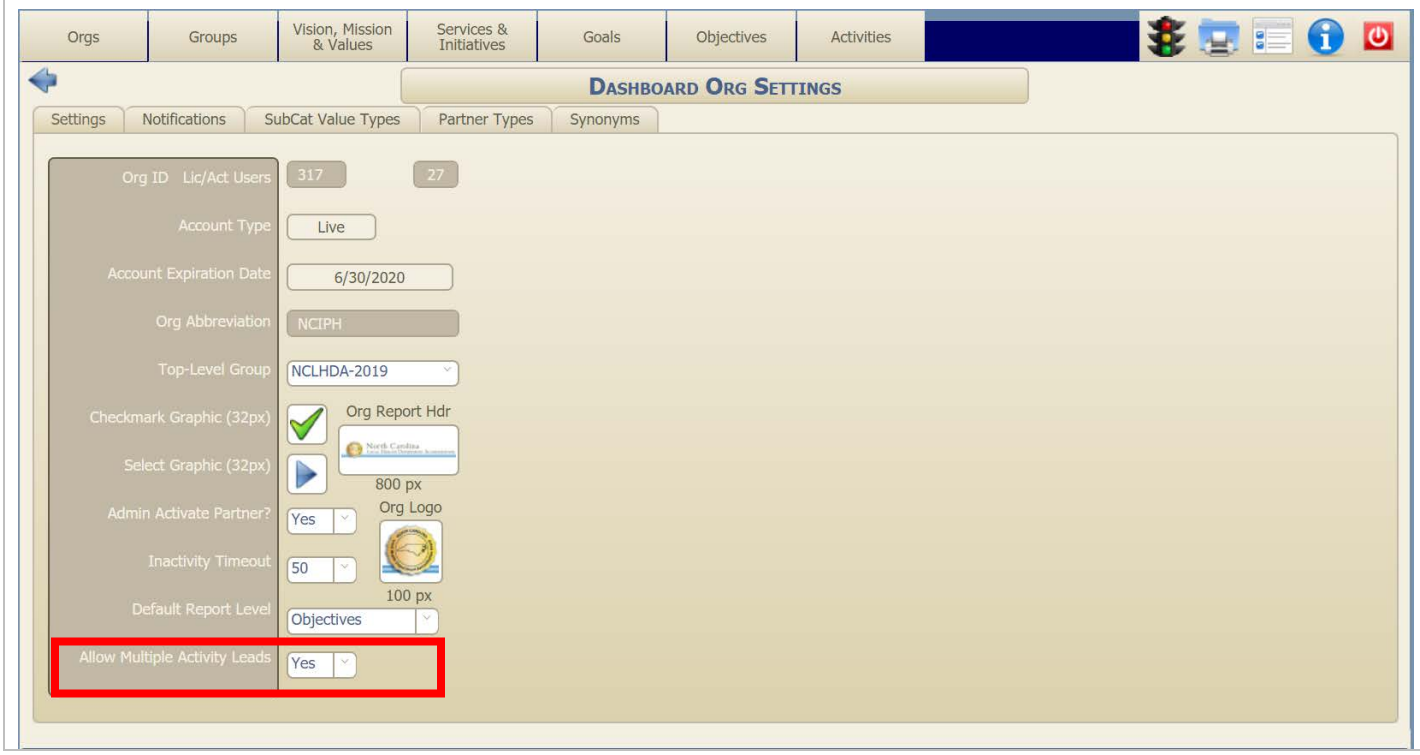
Org Admin users can assign other users as Activity Leads or Team members. Multiple people can be assigned as Leads and a Members for an Activity. Both Leads and Team members can receive email notifications.

Leads have the option of conducting a quick update of the Activities they have been assigned or going to the **Main Menu** to update Activities when they log on to the dashboard.



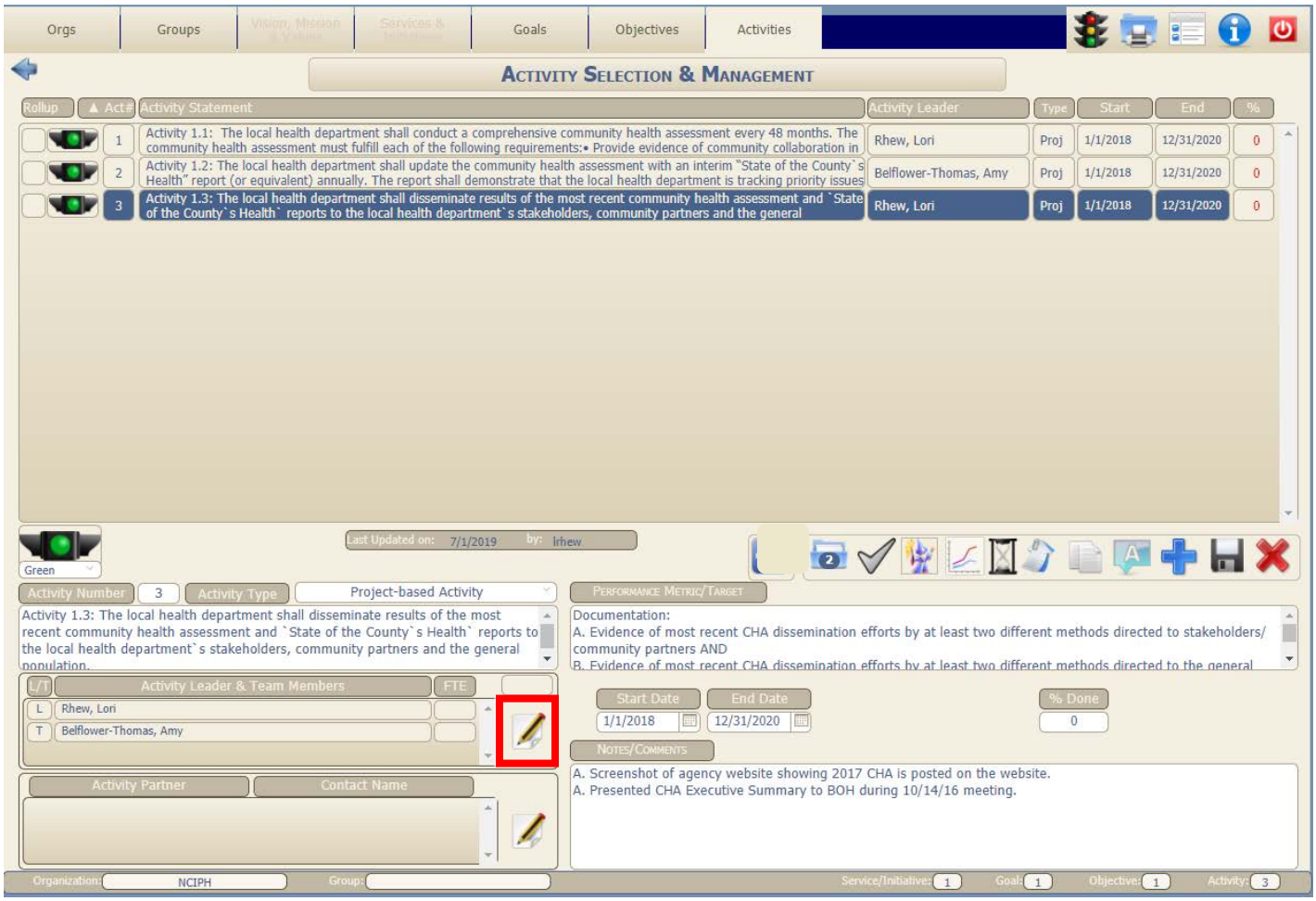
The option to allow mutiple Activity Leads must be selected before more than one Lead can be assigned to an Activity. To enable this feature, click on Settings from the **Main Menu**.

From the Settings screen, at the bottom of the page, select to allow multiple activity leads.



To assign Activity Leads and Team members, navigate to the **Activities Management & Selection** page for the Activity.

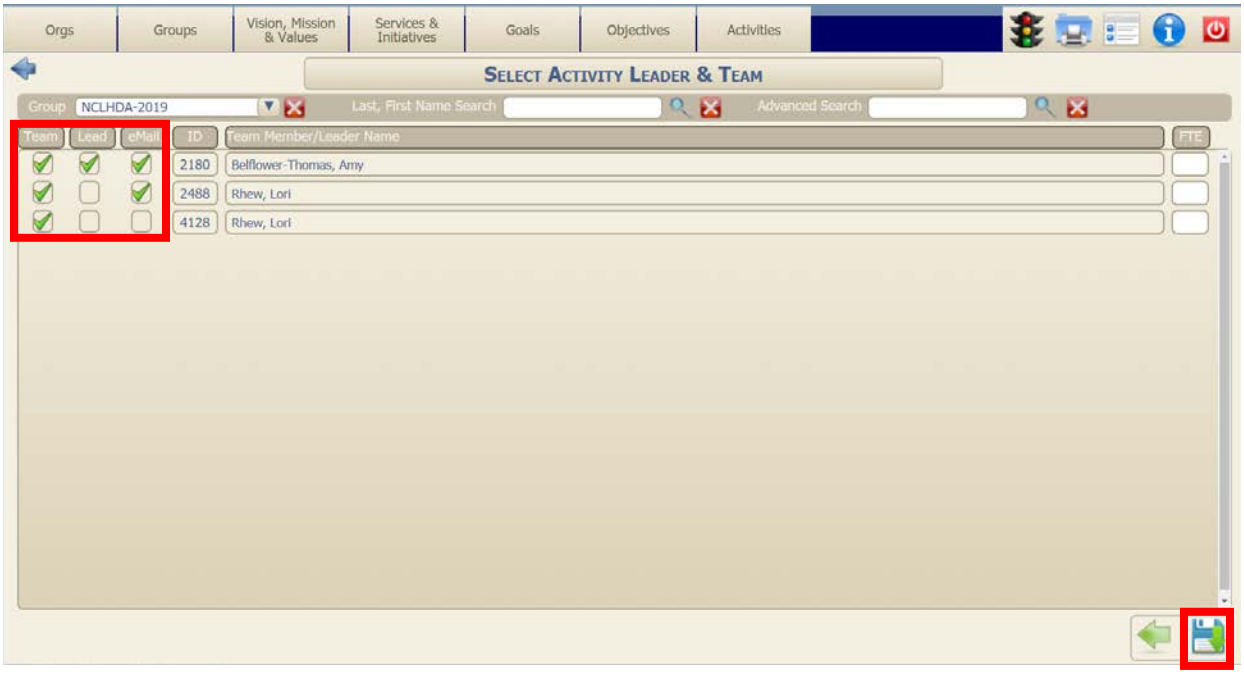
You can view the Activity Team and Lead in a box at the bottom left hand side of the screen. Click on the **Pencil** to view and change the Lead and Team member assignments for the Activity.



Clicking on the pencil will bring you to the page below, where you can make changes to each individual's assignment. When you select the NCLHDA-20XX as the **Group** in the screen below, you will only see users whose default **Group** is NCLHDA-20XX. To see a full list of users for your dashboard, click the red box with the white X next to **Group** and a list of all the users in your dashboard will appear.

Each user can be assigned as an Activity Team member or a Leader and email notification can be enabled for each. If you want to assign multiple Activity Leads, you will need to follow the steps above to enable this feature. Click in the box under Team, Lead and Email to make your selection.

Once you click in the box, a check mark will appear. When you select someone to serve as Lead the box for email is automatically selected, you have the option to unselect it. Once you have made your selection click the **Save** button at the bottom of the screen and it will take you back to the **Activity Selection & Management** page.



When you return to the **Activity Selection & Management** page, you will see that everyone who was selected to receive email notifications has a blue box with the "L" or "T" in it. A white box indicates that email has not been enabled for this user.

View Activity Assignments

There are several options for Org Admins to see who has been assigned to which Activities. You can use the **Dashboard**, the **Activity Selection & Management** page and run a **Team/Lead** report. Each of these methods is explained below.

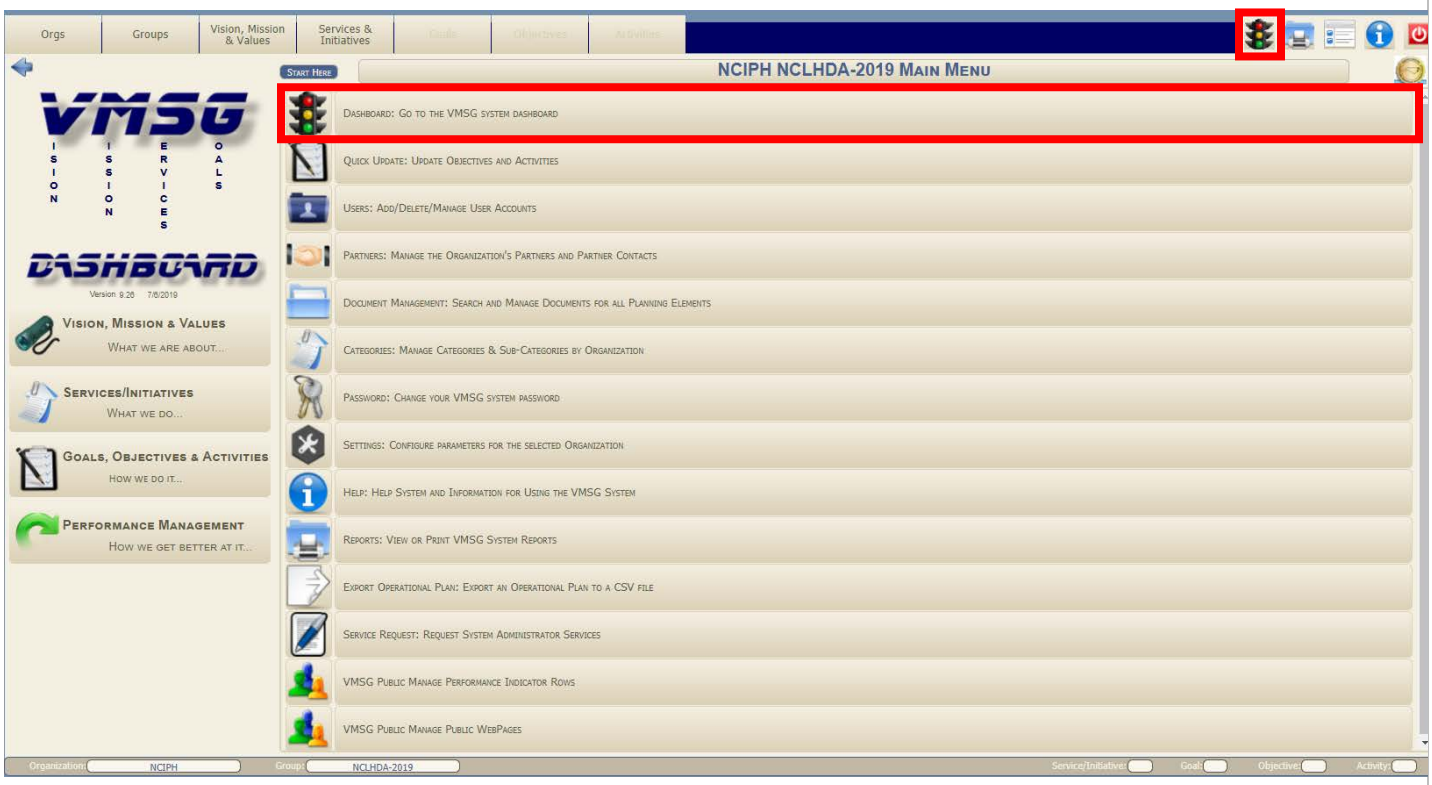
Dashboard - View a list of the Leads for each activity. You will see a list of the Leads and the Activities they have been assigned.

Activity Selection & Management page – view who has been assigned as Lead or as a Team member for a selected Activity.

Team/Lead Report - View everyone who has been assigned to an Activity whether they are the Lead or a Team member.

Dashboard View

When you click on the **Dashboard** from the **Main Menu** or the top right of the screen, it will bring you to the page below. This option allows you to filter by Leads. You will only see the activities that a person is assigned the Lead; you will not be able to see Activities where they are a Team member.

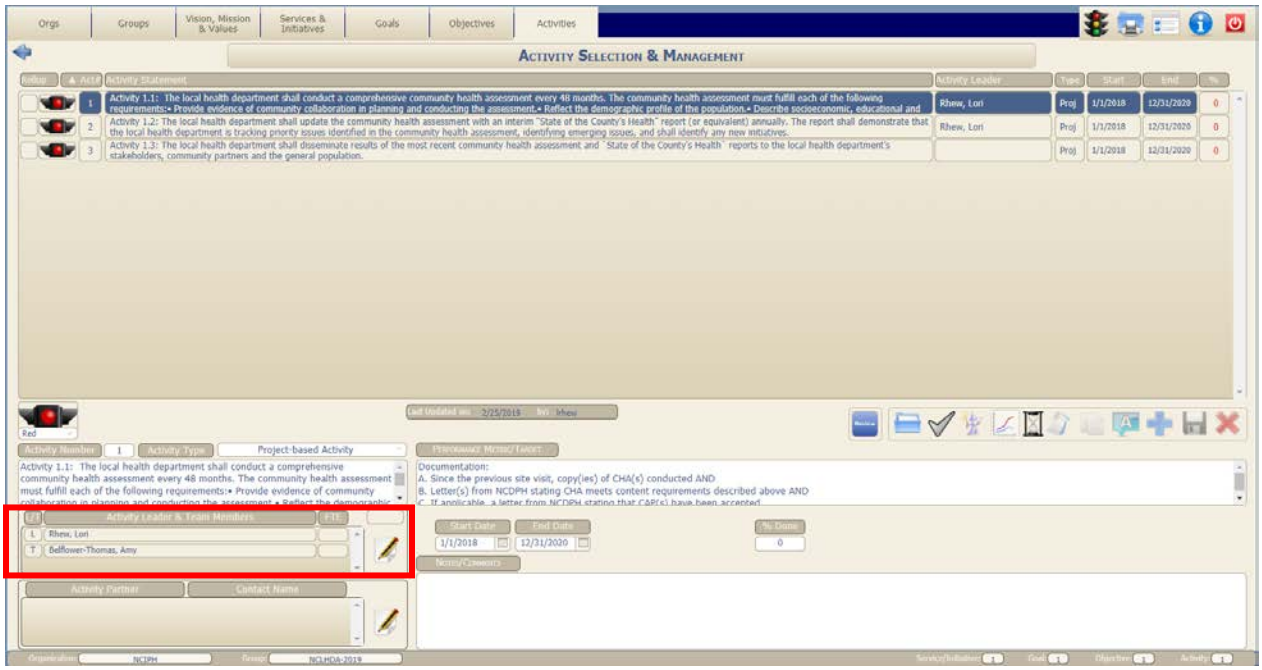


Make sure that you have selected to view by Activities 

and by Leaders.

Activities Selection & Management Page

Navigate to the **Activity Selection & Management** page to see who has been designated as the Lead and Team members of the selected Activity.

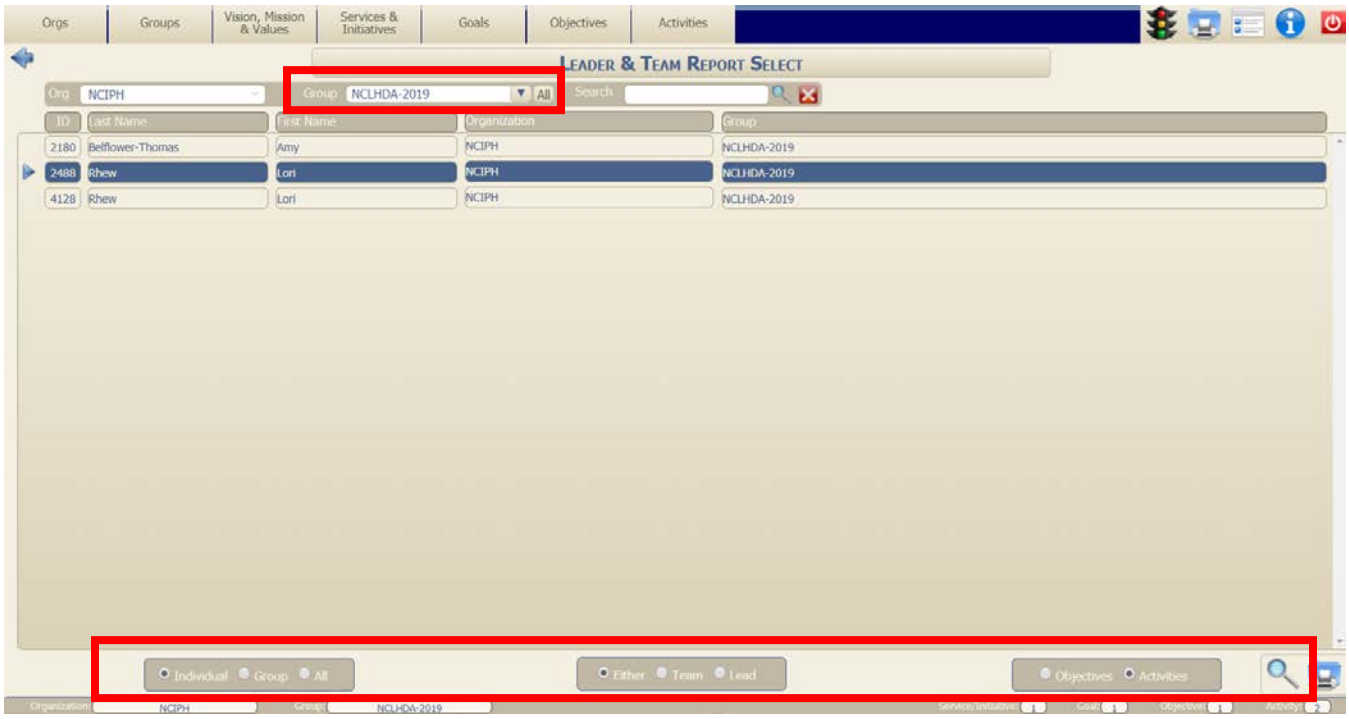


Team/Lead Report

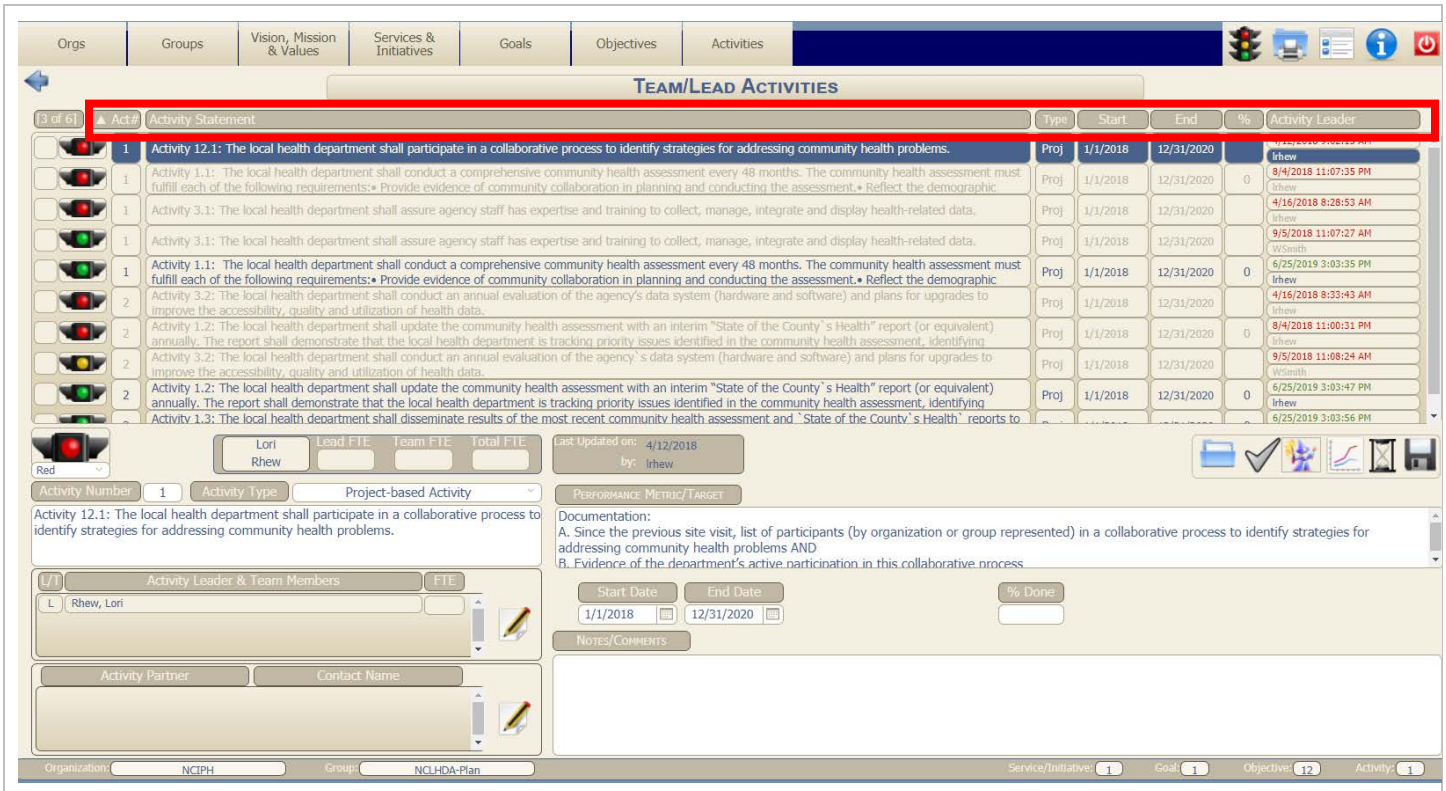
Click **Reports**  from the **Main Menu** or the **Quick Access Menu**.

It will bring you to the **Reports** page below. From here, click on the **Team/Lead** report  .

Select "NCLHDA-20XX" from the dropdown menu next to **Group**. At the bottom, select **Individual** in the bottom left hand corner of the screen to include all your team members. If you want to see the Activities the individual is a team member on select **Team.** If you want to see the Activities the individual is leading, select **Lead.** If you want to see both the Activities, they are a team member of or a lead of choose **Either** in the bottom middle section. Choose **Activities** in the bottom right section.



Once you have made your selections, click the **Magnifying Glass** 🔍 in the bottom right corner. When you click on the magnifying glass, it will bring you to the page below.



You can see each Activity that person has been assigned. From this view, you can also sort by Act # (Activity number), Activity Statement, start and end date.

Setting up Automated Notifications

You can set up automatic email notifications for Activity Leads and Team members. From the **Main Menu** click on **Settings** .

From the **Settings** page, select the **Notifications** tab.

Select **Yes** to turn notifications on or **No** to turn notifications off.

Timeframe next to **Send email Notifications**: Use this dropdown to select the timeframe to send email notifications:

- **Week 1 - Week 4:** Sets the notifications to go out one or more days of the selected week of the month
- **Week 1&3 or Week 2&4**: Sets the notifications to go out one or more days of both selected weeks of the month
- **Every Week:** Sets the notifications to go out one or more days every week of the month
- **Last Day:** Sets the notifications to go out the last day of the calendar month
- **Day of the Month:** Sets the email notification to go out the selected day of the month from 1 - 28 (for consistency)

Email Days: Select one or more day of the week to send the reminder emails. The selected days of the week will be selected based on the timeframe drop-down list.

Email for Last Updated: Sends the notification to all users who have not updated their information in the last 30 days.

Email for Lagging: Sends a notification to each user who has assigned Activities which are lagging behind schedule based on the dates and percent complete.

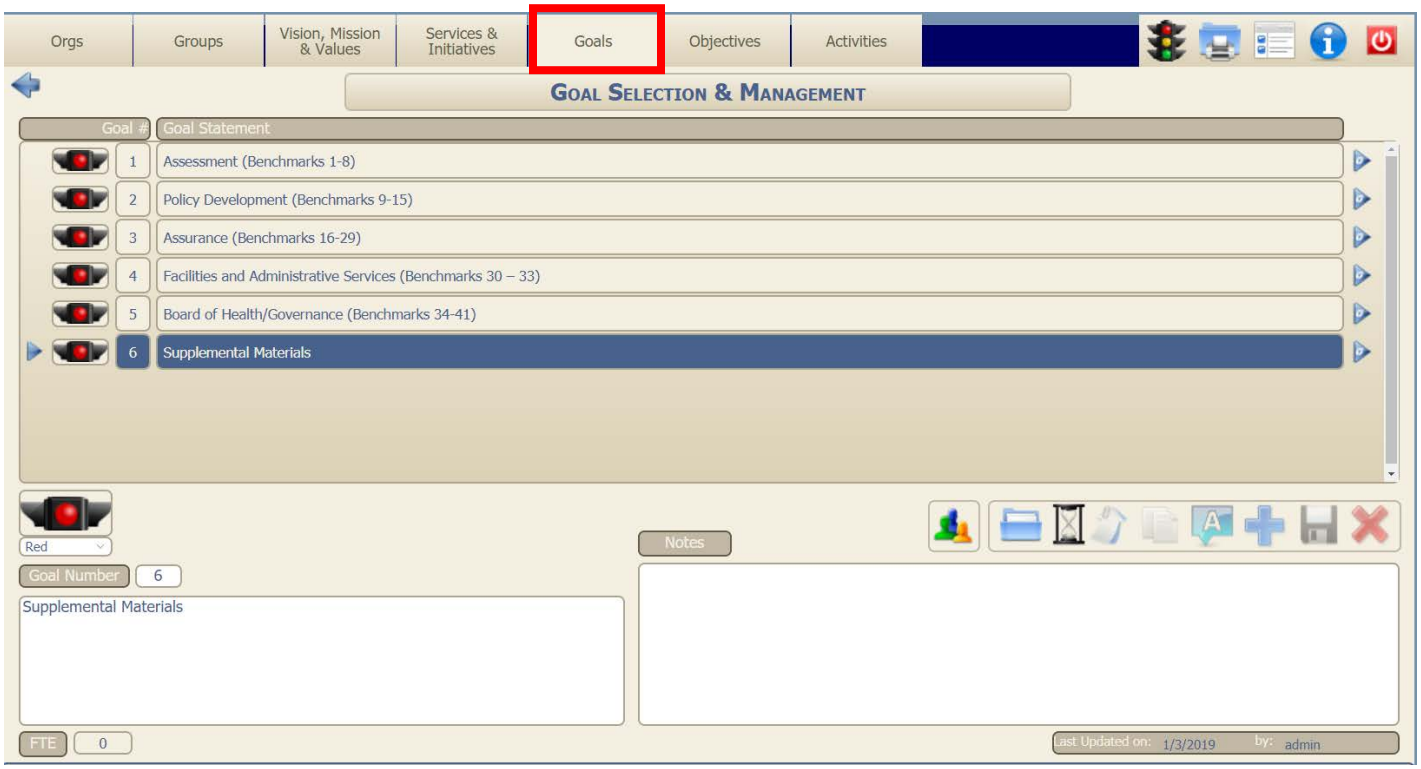
Email for Overdue: Sends a notification to each user who has assigned Activities which are overdue based on the end dates and percent complete.

Site Visitor Introductory Form

The Site Visit Introductory Forms is uploaded directly to the Supplemental Materials Standard from the **Goal Selection & Management** page. This document is uploaded after the 90-day notification cycle conference call. To upload the document, navigate to the **Goals Selection & Management** page, select **Supplemental Materials**, click on the blue folder and follow the steps to the upload the document.

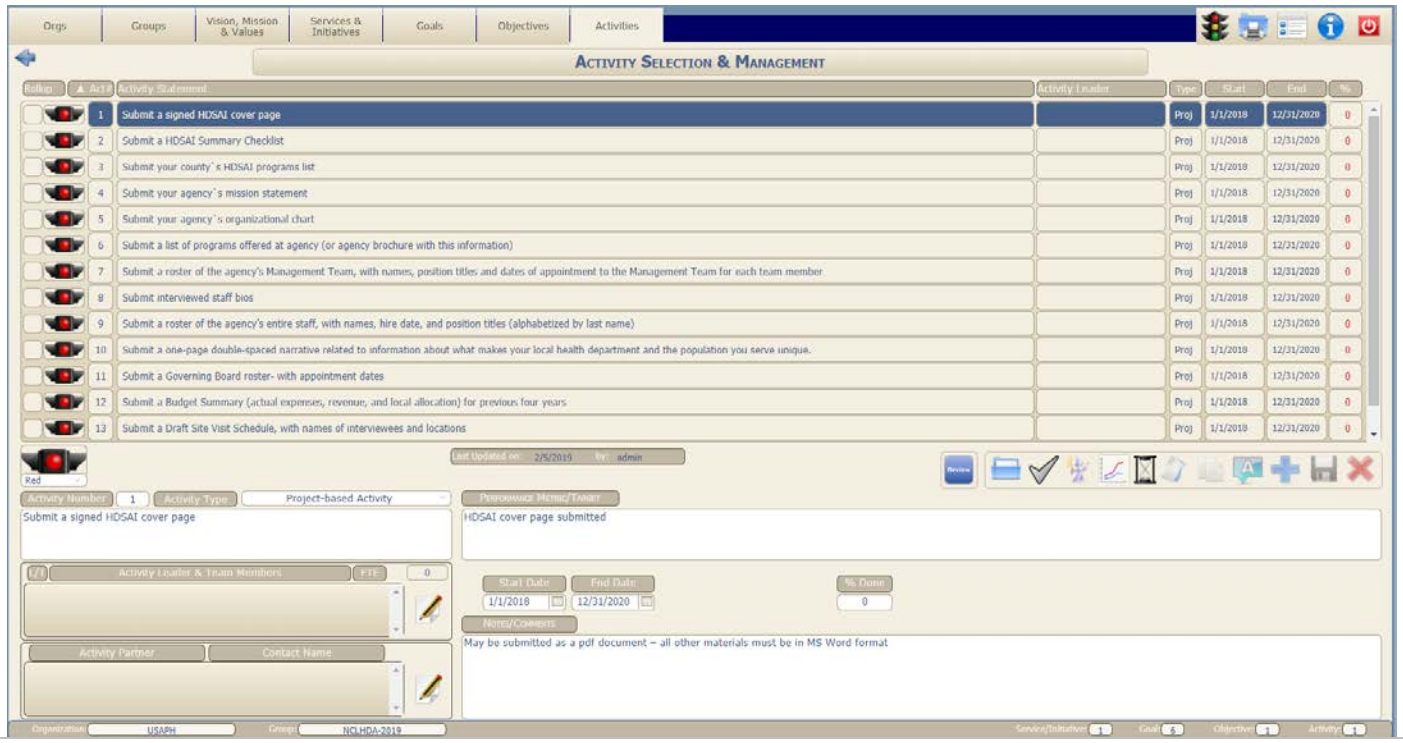
Supplemental Materials

Supplemental materials are the materials that are required to be submitted with the HDSAI/Evidence (https://nclhdaccreditation.unc.edu/process/documents/#site-visit). Navigate to the **Goal Selection & Management** page. Click on **Supplemental Materials** then use the tabs at the top or the blue arrow to the right to navigate to the **Objective Selection & Management** page.



Click on **Supplemental Materials** then use the tabs at the top or the blue arrow to the right to navigate to the **Activity Selection & Management** page.

All the supplemental materials can be uploaded from the **Activity Selection & Management** page.



Sections of this Guide were adapted from Knowledge Capital Alliance, Inc. User Guides (www.kca-inc.com).