



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*.

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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** .



The screenshot displays the VMSG NCIPLH NCLHDA-2019 Main Menu. The interface includes a top navigation bar with tabs for Orgs, Groups, Vision, Mission & Values, Services & Initiatives, and Reports. The main menu is titled "NCIPH NCLHDA-2019 MAIN MENU" and lists various system functions. The "Users: Add/Delete/Manage User Accounts" option is highlighted with a red box. The left sidebar contains sections for VMSG Vision, Mission & Values, Services/Initiatives, Goals, Objectives & Activities, and Performance Management. The bottom of the screen shows filters for Organization (NCIPH), Group (NCLHDA-2019), Service/Initiative, Goal, Objective, and Activity.

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.

ID	Username	Last Name	first Name	eMail Address	Last Activity	Last Data Update
2180	athomas	Belflower-Thomas	Amy	amy.b.thomas@unc.edu	7/18/2019	2/28/2019
2488	lrhew	Rhew	Lori	Lori.Rhew@unc.edu	7/19/2019	7/12/2019
4128	Lori.Rhew	Rhew	Lori	lorirhew@email.unc.edu	7/15/2019	3/13/2019

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.

User ID: _____ Username: _____ Last Activity: 7/3/2019 9:06:44 AM

Update Password: _____

First & Last Name: _____ Title: _____

eMail Address: _____ Phone: _____

Org & Group: NCIPH

Reports to: Rhew, Lori User: User

Modify User & Date: Inhew 7/3/2019 Data: 7/2/2019

Enable Document Management: Team Lead Report: _____

Quick Update Only:

Org Links Group Links Admin Links

Organization: NCIPH Group: _____ Service/Initiative: _____ Goal: _____ Objective: _____ Activity: _____

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.

Orgs Groups Vision, Mission & Values Services & Initiatives Goals Objectives Activities

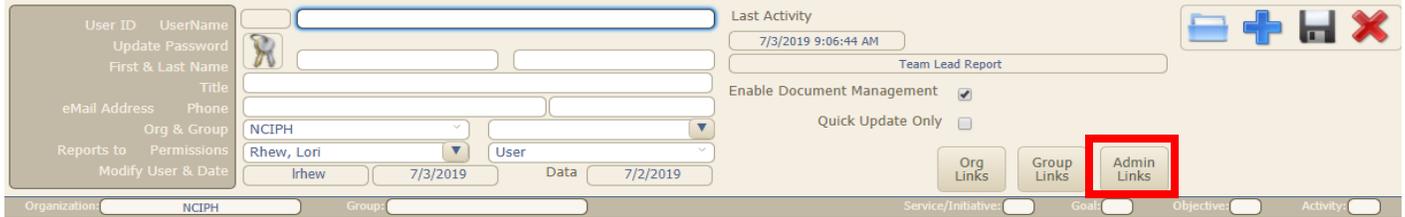
SELECT GROUPS TO LINK TO USER

User: _____ Search: _____

View	Edit	Lvl	ID	Group Abbreviation	Group Name
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	3463	Dept	Department Administration
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	3480	- Accreditation	- Public Health Accreditation
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	3496	-- NCLHDA-2019	-- North Carolina Local Health Department Accreditation - 2019
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	3474	- Admin	- Administration
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	3476	- EH	- Environmental Health
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	3475	- Mgmt Support	- Management Support
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	3477	- Nursing	- Nursing Services
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	3478	- Social Work	- Social Work
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	3479	- WIC	- Women, Infants and Children

Organization: Richmond CHD Group: _____ Service/Initiative: _____ Goal: _____ Objective: _____ Activity: _____

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.



Select	Lvl	ID	Group Abbreviation	Group Name
<input type="checkbox"/>	1	2564	NCLHDA	North Carolina Local Health Department Accreditation
<input checked="" type="checkbox"/>	2	3387	- NCLHDA-2019	- North Carolina Local Health Department Accreditation - 2019

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 HDSA 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.

Previous Activity Next Activity

ACTIVITY QUICK UPDATE

Group NCLHDA-2019 - North Carolina Local Health Department Accreditation - 2019

Service [1] Complete the North Carolina Local Health Department Accreditation (NCLHDA) process

Goal [1] Assessment (Benchmarks 1-8)

Objective [1] BENCHMARK 1: A local health department shall conduct and disseminate results of regular community health assessments at least every 48 months.

Activity [1 of 10]

[3] [Prof] Activity 1.3: The local health department shall disseminate results of the most recent community health assessment and `State of the County` s Health` reports to the local health department` s stakeholders, community partners and the general population.

Performance Metric

Documentation:
 A. Evidence of most recent CHA dissemination efforts by at least two different methods directed to stakeholders/ community partners AND
 B. Evidence of most recent CHA dissemination efforts by at least two different methods directed to the general population AND
 C. Evidence of most recent SOTCH report dissemination efforts by at least two different methods directed to stakeholders/community partners AND
 D. Evidence of most recent SOTCH report dissemination efforts by at least two different methods directed to the general population

Activity Status  % Done

Activity Notes & Comments

A. Screenshot of agency website showing 2017 CHA is posted on the website.
 A. Presented CHA Executive Summary to BOH during 10/14/16 meeting.

Save/Next Activity 

Last Updated on: 7/26/2019 by: Irhew

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.

The screenshot shows the 'USER MANAGEMENT' interface. At the top, there are navigation tabs: Orgs, Groups, Vision, Mission & Messages, Services & Programs, Goals, Objectives, and Activities. Below these is a search bar and filters for 'Org: NCIPLH' and 'Group: NCLHDA-2019'. A table lists users with columns for ID, Username, Last Name, First Name, eMail Address, Last Activity, and Last Data Update. The user 'Lrhew' (ID 2488) is selected. Below the table is a form for editing user details, including fields for User ID, Username, Update Password, First & Last Name, Title, eMail Address, Phone, Org & Group, Reports to, and Permissions. A dropdown menu is open, showing roles: Manager, Org Admin, Partner User, Read-Only User, and User. A red box highlights this dropdown menu.

ID	UserName	Last Name	First Name	eMail Address	Last Activity	Last Data Update
2180	athomas	Belflower-Thomas	Amy	amy.b.thomas@unc.edu	7/18/2019	2/28/2019
2488	Lrhew	Rhew	Lori	Lori.Rhew@unc.edu	7/19/2019	7/12/2019
4128	Lori.Rhew	Rhew	Lori	lorirhew@email.unc.edu	7/15/2019	3/13/2019

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.

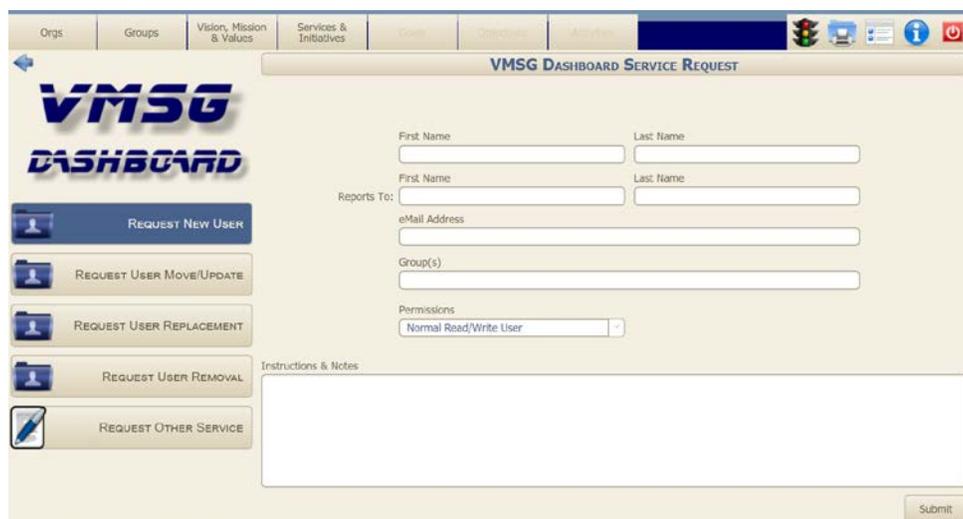
This screenshot shows the same 'USER MANAGEMENT' interface, but with the user details form for 'Lrhew' (ID 2488) expanded. The form includes fields for User ID, Username, Update Password, First & Last Name, Title, eMail Address, Phone, Org & Group, Reports to, and Permissions. A red box highlights the red X icon at the bottom right of the form, which is used to delete the user.

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).

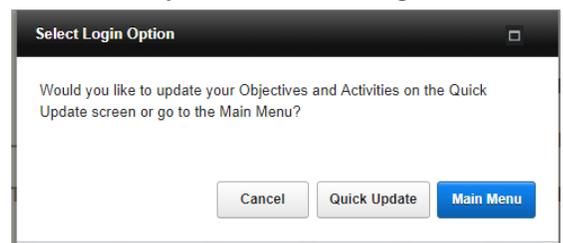


The screenshot shows the VMSG Dashboard Service Request form. The dashboard header includes navigation tabs for Orgs, Groups, Vision, Mission & Values, Services & Initiatives, Home, Dashboard, and Activities. The main content area features the VMSG Dashboard logo and a sidebar with buttons for: REQUEST NEW USER, REQUEST USER MOVE/UPDATE, REQUEST USER REPLACEMENT, REQUEST USER REMOVAL, and REQUEST OTHER SERVICE. The form fields include: First Name (two input boxes), Last Name (two input boxes), Reports To (two input boxes), eMail Address (one input box), Group(s) (one input box), and Permissions (a dropdown menu set to 'Normal Read/Write User'). There is also an 'Instructions & Notes' text area and a 'Submit' button at the bottom right.

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 screenshot shows a dialog box titled 'Select Login Option'. The text inside asks: 'Would you like to update your Objectives and Activities on the Quick Update screen or go to the Main Menu?'. At the bottom, there are three buttons: 'Cancel', 'Quick Update', and 'Main Menu'.

The option to allow multiple 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**.

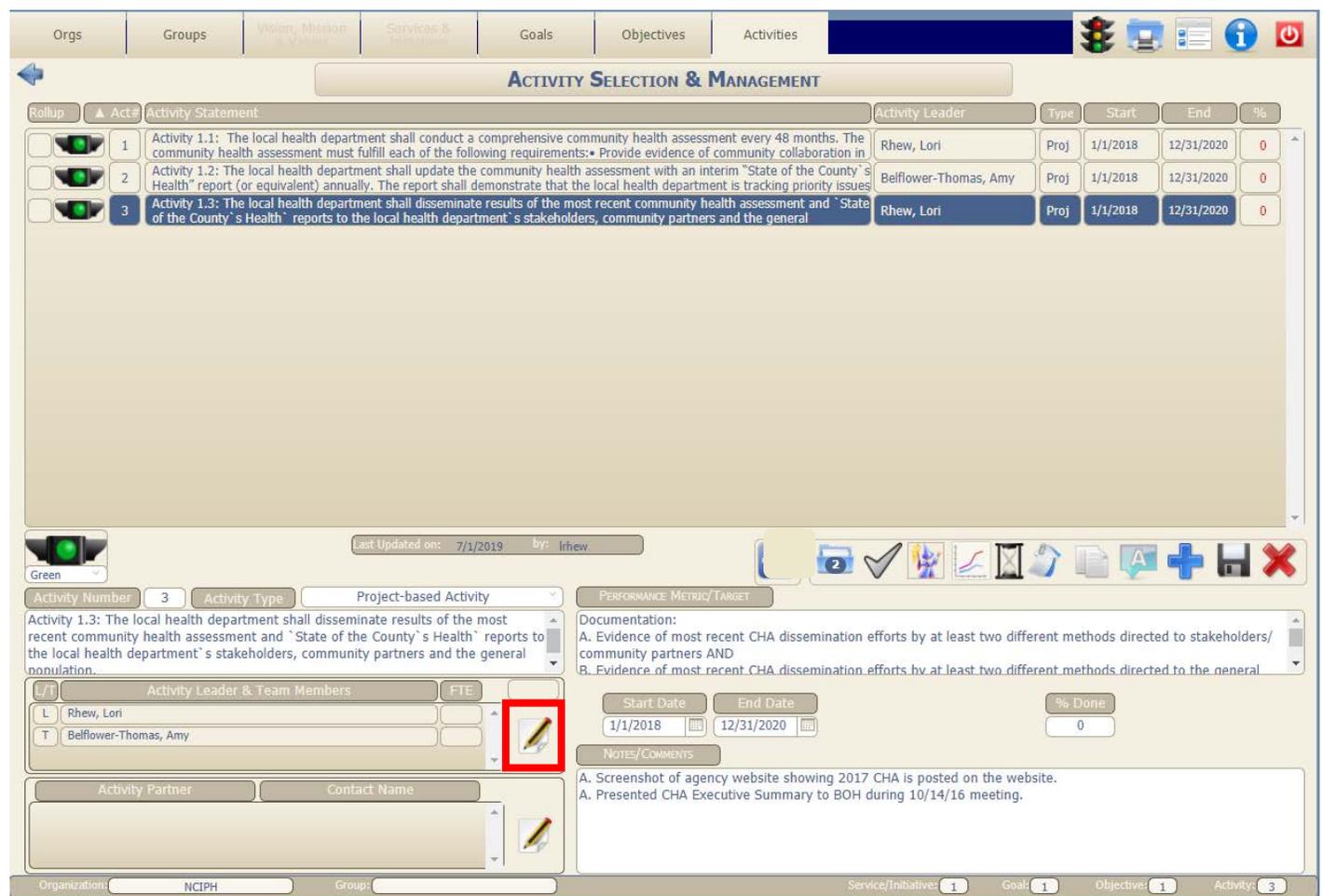
The screenshot shows the VMSG NCIPH NCLHDA-2019 Main Menu. The menu is organized into several sections: Vision, Mission & Values; Services/Initiatives; Goals, Objectives & Activities; and Performance Management. On the right side, there is a list of menu items, each with an icon and a description. The 'SETTINGS' item, which includes the text 'CONFIGURE PARAMETERS FOR THE SELECTED ORGANIZATION', is highlighted with a red rectangular box. Other menu items include 'DASHBOARD', 'QUICK UPDATE', 'USERS', 'PARTNERS', 'DOCUMENT MANAGEMENT', 'CATEGORIES', 'PASSWORD', 'HELP', and 'REPORTS'.

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

The screenshot shows the 'DASHBOARD ORG SETTINGS' screen. The settings are organized into several tabs: Settings, Notifications, SubCat Value Types, Partner Types, and Synonyms. The 'Settings' tab is selected. The settings are displayed in a list format with various input fields, including text boxes, dropdown menus, and checkboxes. The 'Allow Multiple Activity Leads' setting is highlighted with a red rectangular box. The value for this setting is currently set to 'Yes'. Other settings include 'Org ID', 'Lic/Act Users', 'Account Type', 'Account Expiration Date', 'Org Abbreviation', 'Top-Level Group', 'Checkmark Graphic', 'Select Graphic', 'Admin Activate Partner?', 'Inactivity Timeout', and 'Default Report Level'.

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.



Rollup	Act#	Activity Statement	Activity Leader	Type	Start	End	%
<input type="checkbox"/>	1	Activity 1.1: The local health department shall conduct a comprehensive community health assessment every 48 months. The community health assessment must fulfill each of the following requirements:• Provide evidence of community collaboration in	Rhew, Lori	Proj	1/1/2018	12/31/2020	0
<input type="checkbox"/>	2	Activity 1.2: The local health department shall update the community health assessment with an interim "State of the County's Health" report (or equivalent) annually. The report shall demonstrate that the local health department is tracking priority issues	Belflower-Thomas, Amy	Proj	1/1/2018	12/31/2020	0
<input checked="" type="checkbox"/>	3	Activity 1.3: The local health department shall disseminate results of the most recent community health assessment and "State of the County's Health" reports to the local health department's stakeholders, community partners and the general	Rhew, Lori	Proj	1/1/2018	12/31/2020	0

Activity Number: 3 Activity Type: Project-based Activity

Activity 1.3: The local health department shall disseminate results of the most recent community health assessment and "State of the County's Health" reports to the local health department's stakeholders, community partners and the general population.

L/T	Activity Leader & Team Members	FTE
L	Rhew, Lori	
T	Belflower-Thomas, Amy	

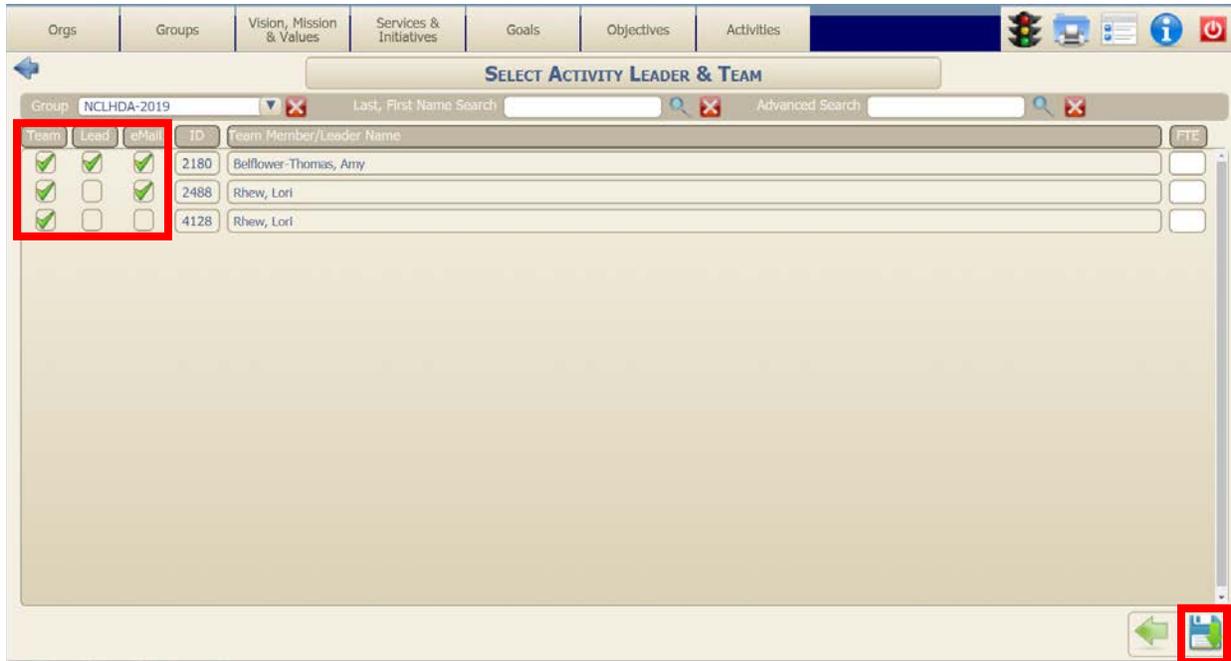
Start Date: 1/1/2018 End Date: 12/31/2020 % Done: 0

NOTES/COMMENTS: A. Screenshot of agency website showing 2017 CHA is posted on the website. A. Presented CHA Executive Summary to BOH during 10/14/16 meeting.

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**.



Activity Leader	Last Updated	ETC	#Logins	Days	#Overdue	Leaders	Events	Members
Belflower-Thomas, Amy	2/28/2019 8:59:10 AM		2	-212	0	3	0	1
Rhew, Lori	2/28/2019 10:29:36 AM		3	-181	0	3	2	2

Activities Selection & Management Page

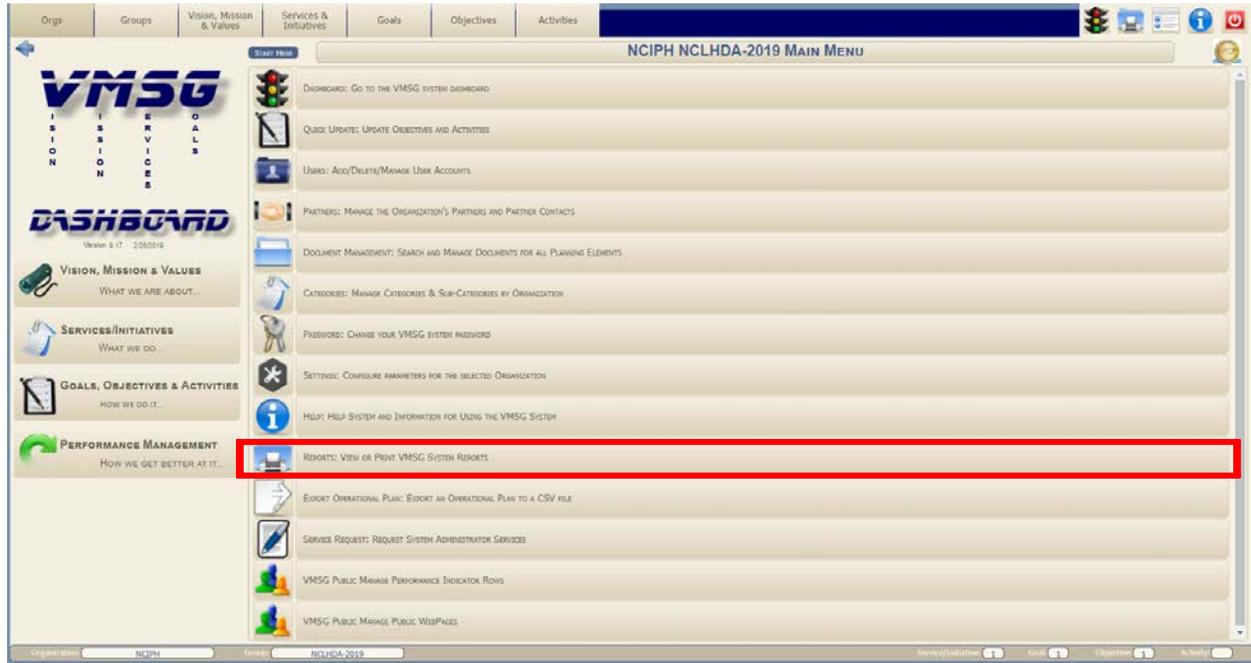
Navigate to the **Activity Selection & Management** page to see who has been designated as the Lead and Team members of the selected Activity.

Activity Number	Activity Statement	Activity Leader	Type	Start	End	%
1	Activity 1.1: The local health department shall conduct a comprehensive community health assessment every 48 months. The community health assessment must fulfill each of the following requirements: Provide evidence of community collaboration in planning and conducting the assessment; Reflect the demographic profile of the population; Describe socioeconomic, educational and...	Rhew, Lori	Proj	1/1/2018	12/31/2020	0
2	Activity 1.2: The local health department shall update the community health assessment with an interim "State of the County's Health" report (or equivalent) annually. The report shall demonstrate that the local health department is tracking priority issues identified in the community health assessment, identifying emerging issues, and shall identify any new initiatives.	Rhew, Lori	Proj	1/1/2018	12/31/2020	0
3	Activity 1.3: The local health department shall disseminate results of the most recent community health assessment and "State of the County's Health" reports to the local health department's stakeholders, community partners and the general population.		Proj	1/1/2018	12/31/2020	0

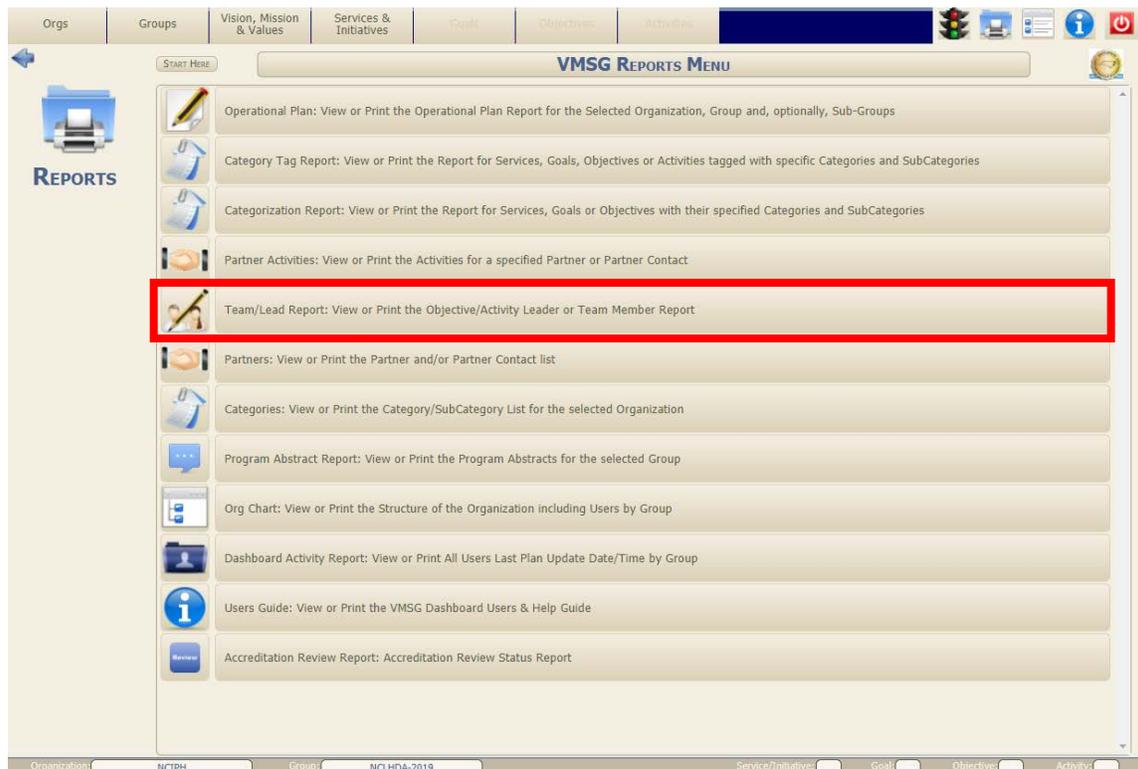
Role	Name
L	Rhew, Lori
T	Belflower-Thomas, Amy

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.

The screenshot shows the 'LEADER & TEAM REPORT SELECT' interface. At the top, there are tabs for 'Orgs', 'Groups', 'Vision, Mission & Values', 'Services & Initiatives', 'Goals', 'Objectives', and 'Activities'. Below these is a search bar and a dropdown menu for 'Group' set to 'NCLHDA-2019'. A table lists team members with columns for ID, Last Name, First Name, Organization, and Group. The bottom navigation bar has radio buttons for 'Individual', 'Group', and 'All', and buttons for 'Either', 'Team', and 'Lead'. There are also buttons for 'Objectives' and 'Activities', and a magnifying glass icon in the bottom right corner.

ID	Last Name	First Name	Organization	Group
2180	Bellflower-Thomas	Amy	NCIPH	NCLHDA-2019
2488	Rhew	Lori	NCIPH	NCLHDA-2019
4128	Rhew	Lori	NCIPH	NCLHDA-2019

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.

Orgs | Groups | Vision, Mission & Values | Services & Initiatives | Goals | Objectives | Activities

TEAM/LEAD ACTIVITIES

Act#	Activity Statement	Type	Start	End	%	Activity Leader
1	Activity 12.1: The local health department shall participate in a collaborative process to identify strategies for addressing community health problems.	Proj	1/1/2018	12/31/2020		Lrhew
1	Activity 1.1: The local health department shall conduct a comprehensive community health assessment every 48 months. The community health assessment must fulfill each of the following requirements:• Provide evidence of community collaboration in planning and conducting the assessment.• Reflect the demographic	Proj	1/1/2018	12/31/2020	0	8/4/2018 11:07:35 PM Lrhew
1	Activity 3.1: The local health department shall assure agency staff has expertise and training to collect, manage, integrate and display health-related data.	Proj	1/1/2018	12/31/2020		4/16/2018 8:28:53 AM Lrhew
1	Activity 3.1: The local health department shall assure agency staff has expertise and training to collect, manage, integrate and display health-related data.	Proj	1/1/2018	12/31/2020		9/5/2018 11:07:27 AM WSmith
1	Activity 1.1: The local health department shall conduct a comprehensive community health assessment every 48 months. The community health assessment must fulfill each of the following requirements:• Provide evidence of community collaboration in planning and conducting the assessment.• Reflect the demographic	Proj	1/1/2018	12/31/2020	0	6/25/2019 3:03:35 PM Lrhew
2	Activity 3.2: The local health department shall conduct an annual evaluation of the agency's data system (hardware and software) and plans for upgrades to improve the accessibility, quality and utilization of health data.	Proj	1/1/2018	12/31/2020		4/16/2018 8:33:43 AM Lrhew
2	Activity 1.2: The local health department shall update the community health assessment with an interim "State of the County's Health" report (or equivalent) annually. The report shall demonstrate that the local health department is tracking priority issues identified in the community health assessment, identifying	Proj	1/1/2018	12/31/2020	0	8/4/2018 11:00:31 PM Lrhew
2	Activity 3.2: The local health department shall conduct an annual evaluation of the agency's data system (hardware and software) and plans for upgrades to improve the accessibility, quality and utilization of health data.	Proj	1/1/2018	12/31/2020		9/5/2018 11:08:24 AM WSmith
2	Activity 1.2: The local health department shall update the community health assessment with an interim "State of the County's Health" report (or equivalent) annually. The report shall demonstrate that the local health department is tracking priority issues identified in the community health assessment, identifying	Proj	1/1/2018	12/31/2020	0	6/25/2019 3:03:47 PM Lrhew
2	Activity 1.3: The local health department shall disseminate results of the most recent community health assessment and "State of the County's Health" reports to	Proj	1/1/2018	12/31/2020		6/25/2019 3:03:56 PM Lrhew

Activity Number: 1 | Activity Type: Project-based Activity | Performance Metric/Target: Documentation: A. Since the previous site visit, list of participants (by organization or group represented) in a collaborative process to identify strategies for addressing community health problems AND B. Evidence of the department's active participation in this collaborative process.

Activity Leader & Team Members: L Rhew, Lori | FTE: | Start Date: 1/1/2018 | End Date: 12/31/2020 | % Done: | Notes/Comments:

Organization: NCIPH | Group: NCLHDA-Plan | Service/Initiative: 1 | Goal: 1 | Objective: 12 | Activity: 1

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** .



The screenshot displays the VMSG system main menu for the organization NCI PH and group NCLHDA-2019. The menu is titled "NCIPH NCLHDA-2019 MAIN MENU" and includes a "START HERE" button. The left sidebar contains navigation options: "VISION, MISSION & VALUES", "SERVICES/INITIATIVES", "GOALS, OBJECTIVES & ACTIVITIES", and "PERFORMANCE MANAGEMENT". The main menu items are:

- DASHBOARD: GO TO THE VMSG SYSTEM DASHBOARD
- QUICK UPDATE: UPDATE OBJECTIVES AND ACTIVITIES
- USERS: ADD/DELETE/MANAGE USER ACCOUNTS
- PARTNERS: MANAGE THE ORGANIZATION'S PARTNERS AND PARTNER CONTACTS
- DOCUMENT MANAGEMENT: SEARCH AND MANAGE DOCUMENTS FOR ALL PLANNING ELEMENTS
- CATEGORIES: MANAGE CATEGORIES & SUB-CATEGORIES BY ORGANIZATION
- PASSWORD: CHANGE YOUR VMSG SYSTEM PASSWORD
- SETTINGS: CONFIGURE PARAMETERS FOR THE SELECTED ORGANIZATION** (highlighted with a red box)
- HELP: HELP SYSTEM AND INFORMATION FOR USING THE VMSG SYSTEM
- REPORTS: VIEW OR PRINT VMSG SYSTEM REPORTS
- EXPORT OPERATIONAL PLAN: EXPORT AN OPERATIONAL PLAN TO A CSV FILE
- SERVICE REQUEST: REQUEST SYSTEM ADMINISTRATOR SERVICES
- VMSG PUBLIC MANAGE PERFORMANCE INDICATOR ROWS

At the bottom, there are filters for Organization (NCIPH), Group (NCLHDA-2019), Service/Initiative, Goal, Objective, and Activity.

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



The screenshot shows the 'Dashboard Org Settings' interface. At the top, there are navigation tabs: 'Orgs', 'Groups', 'Vision, Mission & Values', 'Services & Initiatives', 'Goals', 'Objectives', and 'Activities'. Below these is a sub-navigation bar with 'Settings', 'Notifications' (highlighted with a red box), 'SubCat Value Types', 'Partner Types', and 'Synonyms'. The main content area is a form with various settings:

- Org ID: 317
- Lic/Act Users: 27
- Account Type: Live
- Account Expiration Date: 6/30/2020
- Org Abbreviation: NCIPH
- Top-Level Group: NCLHDA-2019
- Checkmark Graphic (32px):
- Select Graphic (32px): 
- Admin Activate Partner?: Yes
- Inactivity Timeout: 50
- Default Report Level: Objectives
- Allow Multiple Activity Leads: Yes

Additional settings include 'Org Report Hdr' (800 px) and 'Org Logo' (100 px).

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.

The screenshot shows the 'DASHBOARD ORG SETTINGS' interface. The 'Send eMail Notifications' section is highlighted with a red box. It includes a 'Yes' dropdown, a 'Week 4' dropdown, and a row of checkboxes for days of the week (Su, Mo, Tu, We, Th, Fr, Sa). Below this are four checkboxes for 'eMail Days', 'eMail for Last Updated?', 'eMail for Lagging?', and 'eMail for Overdue?'.

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.

Orgs Groups Vision, Mission & Values Services & Initiatives **Goals** Objectives Activities

GOAL SELECTION & MANAGEMENT

Goal #	Goal Statement
1	Assessment (Benchmarks 1-8)
2	Policy Development (Benchmarks 9-15)
3	Assurance (Benchmarks 16-29)
4	Facilities and Administrative Services (Benchmarks 30 – 33)
5	Board of Health/Governance (Benchmarks 34-41)
6	Supplemental Materials

Red

Goal Number: 6

Supplemental Materials

FTE: 0

Last Updated on: 1/3/2019 by: admin

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.

Orgs Groups Vision, Mission & Values Services & Initiatives Goals Objectives Activities

OBJECTIVE SELECTION & MANAGEMENT

Objective #	Objective Statement	Obj %	Objective Leader
1	Submit Supplemental Materials	0%	

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

Activity Number	Activity Statement	Activity Leader	Type	Start	End	%
1	Submit a signed HDSAI cover page		Proj	1/1/2018	12/31/2020	0
2	Submit a HDSAI Summary Checklist		Proj	1/1/2018	12/31/2020	0
3	Submit your county's HDSAI programs list		Proj	1/1/2018	12/31/2020	0
4	Submit your agency's mission statement		Proj	1/1/2018	12/31/2020	0
5	Submit your agency's organizational chart		Proj	1/1/2018	12/31/2020	0
6	Submit a list of programs offered at agency (or agency brochure with this information)		Proj	1/1/2018	12/31/2020	0
7	Submit a roster of the agency's Management Team, with names, position titles and dates of appointment to the Management Team for each team member		Proj	1/1/2018	12/31/2020	0
8	Submit interviewed staff bios		Proj	1/1/2018	12/31/2020	0
9	Submit a roster of the agency's entire staff, with names, hire date, and position titles (alphabetized by last name)		Proj	1/1/2018	12/31/2020	0
10	Submit a one-page double-spaced narrative related to information about what makes your local health department and the population you serve unique.		Proj	1/1/2018	12/31/2020	0
11	Submit a Governing Board roster- with appointment dates		Proj	1/1/2018	12/31/2020	0
12	Submit a Budget Summary (actual expenses, revenue, and local allocation) for previous four years		Proj	1/1/2018	12/31/2020	0
13	Submit a Draft Site Visit Schedule, with names of interviewees and locations		Proj	1/1/2018	12/31/2020	0

Activity Number: 1 | Activity Type: Project-based Activity | Personalized Memo/Timer: HDSAI cover page submitted
 Start Date: 1/1/2018 | End Date: 12/31/2020 | % Done: 0
 Notes/Comments: May be submitted as a pdf document - all other materials must be in MS Word format

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