



# Organization Dashboard User Guide

## ODJFS licensed programs

**[For a visual walk-through, please visit our tutorial on the Organization Dashboard here.](#)**

The Organization Dashboard is a resource that Administrator's can use to manage the program's registry information. It is a helpful tool in the program administrator's daily work. For ODJFS licensed programs, access will be automatically given by the system to the first administrator listed on the program license in OCLQS. Other professionals seeking access must contact [registry@ocrra.org](mailto:registry@ocrra.org) for additional information.

**The Organization Dashboard is a resource that Administrator's can use to manage the program's registry information. It is a helpful tool in the program administrator's daily work. For ODE licensed programs, access will be given to the OPR administrator and must contact [registry@ocrra.org](mailto:registry@ocrra.org) with the OPIN and program license number of the program requesting access.**

**6/26/2020**

**Updates have been completed on the Organization Dashboard to support the release of the Employee Record Chart (ERC) on July 1, 2020 for ODJFS and ODE Licensing and Step Up To Quality Specialists. The ERC will pull data from the Ohio Professional Registry and populate employment, credentials, education and professional development into the ERC. It is imperative that employment records and profiles on each of your staff are up to date.**

**The two new sections of the Organization Dashboard include Groups in place of Classrooms (to match licensing language) and Staff Schedules. Information has been added to this user guide.**

To access the program's Organization Dashboard, the professional must start by clicking on their name in the upper right-hand corner of their registry profile. Select "Organization Dashboard". There will be a drop-down menu option- if you have to more than one program, they will all be listed here. Select the program you are wanting to manage.

Enrollment

Capacity

Manage

Once you enter the Dashboard you will see basic program information. The Enrollment tab is used for Ohio Department of Job and Family Services licensed programs and is pulled weekly from OCLQS. You can edit this information by clicking MANAGE.

Professionals

Manage

The Professionals graph is used to show you the amount of people that hold a position within your program. This is strictly used a tool in your daily work. You can edit this information by clicking MANAGE as well.

### ★ Step Up To Quality

Next you will see the box labeled Step Up to Quality. This is where you will see any quality rating for your program listed. In this case, Chas is working at a program who is getting ready to apply for the SUTQ program.

### 👤 Employees Pending Verification

The Employees Verification tab is the most critical part of this screen. You will see the message has changed and you now only have the option to check the checkmark. There is also a new message notifying Administrator's that all professionals need to be verified by clicking yes, then applying an end-date from the current employee's screen. For a walk-through of this technique please view our [Organization Dashboard Tutorial](#).

\*Note- Family Child Care administrator's must also add themselves as an employee and verify their own employment under this screen as well.

The Facility information and resources sections are listed at the bottom of the Dashboard home page. These are resources for program administrators.



### Groups

*(Previously called Classrooms)*

Groups tab -This tab is an important tool that is required to be completed so that the information on each group will populate into the Employee Record Chart. You will need to add each group in your program to the organization dashboard. It is important to note that each group only needs to be added once to this section. Click Add Group to begin. You will add the group and include name of the group, the lead teacher's name, number of children enrolled in the group and their age. Click +Add to save the group.

Please note: You will need to complete the information on each group in your program before you will be able to enter your staff's working schedule into Staff Schedules.

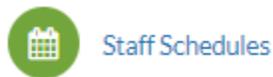


### Applications

This tab is for programs interested in applying for the Ohio Healthy programs. If you are looking for more information regarding the Ohio Healthy Programs, you can visit the OCCRRA.org resources page under the Ohio Health Programs tab.



This is the page where you will find two very important reports: the program summary report and the program detail report.



***Completion of Staff Schedules is brand new functionality in the Organization Dashboard.***

Staff schedules –Staff schedules will be created in the Organization Dashboard and will populate into the Employee Record Chart. These schedules will be editable in the ERC by the State (ODJFS or ODE) or JFS County Staff in case of any changes not updated in the Organization Dashboard.

Click on Staff Schedules and then select an employee from your employee dropdown. After you have selected the employee, the next section opens up and shows you how many roles this professional has in your program. **Please note: You will need to add a schedule for each role that each employee has in your program.**

Next, add the schedule for your employee by clicking on +Add Schedule. Choose the Group associated with the Role (this applies to lead and assistant teachers, other roles such as Administrator, Cook, Substitute will not have a group assignment). Be reminded, Roles populate from the professional's Employment Record and if the correct roles are not in the Organization Dashboard, you staff may need to update their employment. After you have the group and role selected, please click and hold the mouse on the times in the schedule to add the working hours.

Once the schedule is complete for that employee, click the Save button in the blue bar. This will save the schedule. Then move on the next employee to complete their schedule.

You will see a small clock icon on the Current Employees screen for each staff that you have completed a schedule in the dashboard. If you have not completed a schedule for a staff member, there will not be an icon.

### Program Summary Report

Let's look at the program summary report first. You will start by clicking GENERATE REPORT. This will open the report in a PDF document. You will see basic information on the report at the top and all your current employees listed below. You will need to check to be sure you see only your current employees working at your program. If you see professionals who no longer are employed at your program, you will need to end date that employment in the current employees tab. See below for further instructions. If you are missing an employee, it is most likely their

employment record is incorrect and needs to be fixed so it will show on the program summary report. Check this report often and be sure it is accurate and up-to-date.

For each current professional working at your program, you will see their name, OPIN and highest degree verified in our registry system. If you see an asterisk next to the document, it means it has been uploaded to the professional's profile, but our staff have not reviewed that

document yet. You will also see if they currently have a CDA or Ohio Admin Credential, their current CPL, and information regarding their PD certificates. The date of hire, positions, and age groups worked are listed on the right of the screen.

Again, please be sure this information is up-to-date, and you only see employees currently working at your program.

### Program Detail Report

You can open the Program Detail Report by clicking GENERATE REPORT. It will hold similar information as the summary, however it will list all Ohio Approved trainings and show both the first Biennium and the current biennium PD certificates for each professional working at the program. This is the report you as the administrator can use to track the number of Ohio approved trainings hours a professional has in the current biennium. When the professional meets all the requirements for the SUTQ PD CERTIFICATE, the indicator on the left will change to completed status instead of in-progress status.



### Current Employees

The current employees tab will list professionals who are currently employed at your program. You may notice some professionals in this list that no longer work at your program. You can adjust this information by clicking the remove button, entering in an end-date and clicking save. This will end date that professional's employment record, so they will no longer show on the program summary or detail reports.

When an employment record for your program is end dated, that professional's information is then moved to the former employees tab.

Please be sure to check out our resources tab on our home page at OCCRRA.org for additional information and the Organization Dashboard tutorial video.