



Organization Dashboard User Guide

The Organization Dashboard is a resource that Administrators can use to manage the program's registry information. It is a helpful tool in the program administrator's daily work.

Requesting Organization Dashboard access

Some administrators will receive access automatically, while others may need to request access. A professional who needs access can send the following details to registry@occrra.org.

- For an Ohio Department of Education (ODE) program, your request must be on school letterhead and include the name of the requestor, OPIN of the requestor and the program license number needing access to.
- For an Ohio Department of Job and Family Services (ODJFS) program, your request must include the name of the requestor, OPIN of the requestor and the program license number needing access to. The OPR will check our data provided from ODJFS and if the data matches, access will be provided. If it does not match, then one of the following can be provided to receive access:
 - o a copy of the ODJFS license with the requestors name listed as administrator
 - a letter on agency/company letterhead from the owner of the program stating access should be provided for the requestor.

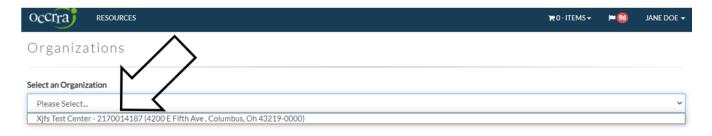
Accessing the Organization Dashboard

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 and select "Organization Dashboard".



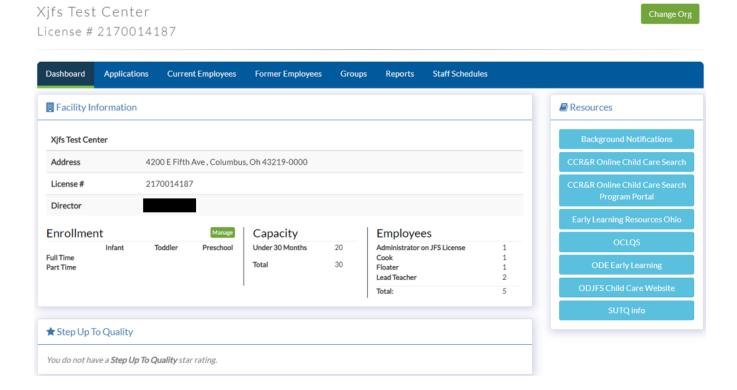


Select a program from the drop-down menu. If a professional has access to more than one program, they will all be listed here.



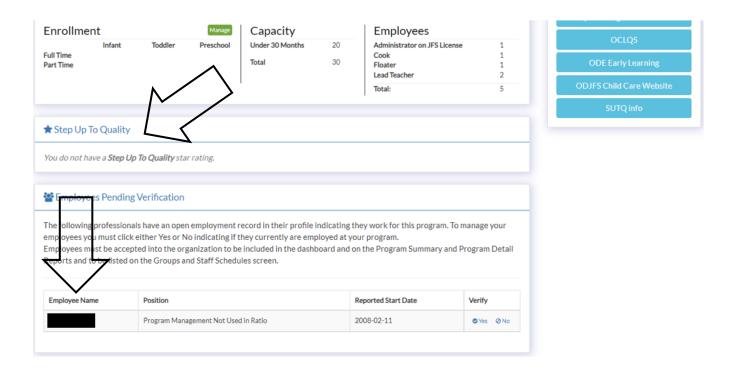
Organization Dashboard main landing page

The Organization Dashboard main landing page includes a program overview. It includes the name, address, license number and director on the license. It also includes Enrollment, Capacity and Employee summaries and a section for commonly used resources.





The box labelled Step Up To Quality is where you will see the quality rating for the program listed, if applicable.



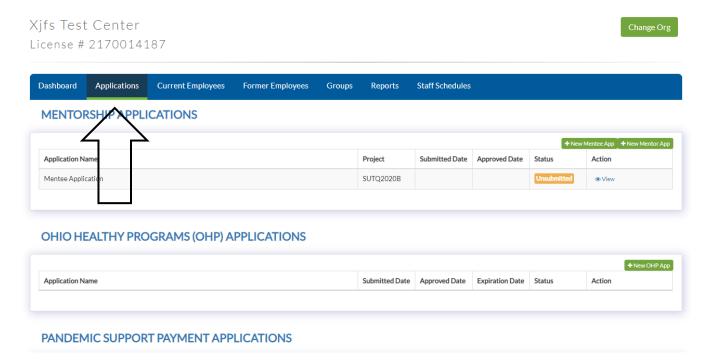
The Employees Pending Verification section is the one of the most critical parts of this screen. An administrator must review all professionals listed in this box to verify if that professional is an employee of that program. If they are, the administrator needs to click yes, indicating the employee is a valid employee at that program. If the professional does not currently work at that program, the administrator needs to click no and then provide an end date of employment.

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



Applications Tab

The Applications tab is for programs interested in applying for the Ohio Healthy programs, mentorship program, Pandemic Support Payments and any other available OCCRRA initiatives.

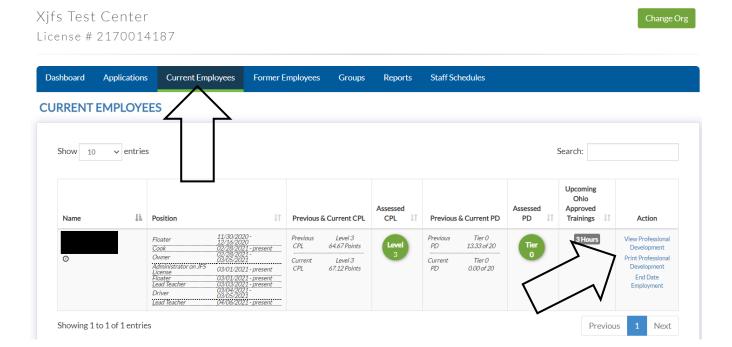




Current Employees Tab

The current employees tab will list professionals who are currently employed at the program. If there are professionals who are listed in the current employee's tab that no longer work at the program, the program administrator can click "End Date Employment" and provide an end date. This action will also end date the employment in the professional's profile. When an employment record for the program is end dated, that professional's information is then moved to the former employee's tab and removed from all program reports.

The current employees screen shows all the current employees for that program, their position history, previous and current CPL, assessed as CPL, previous and current PD certificate, assessed as PD Certificate and the number of upcoming Ohio Approved trainings. In the Action column, there is an option to View Professional Development and Print Professional Development for each professional at that program.





To view Professional Development for a professional, click on the View Professional Development link. The Professional Development (PD) tab from the professional's profile will display here, showing the Organization Dashboard administrator all the professional development events that professional has in their profile. It is a view only look and will not allow the program administrator to edit, remove or add any professional development events. The administrator can see all the professional development events the professional is registered for, has completed (verified), marked as no show, as well as all the PD they have uploaded to their profile and the status of that upload, including the Approvals type.

PROFESSIONAL DEVELOPMENT

Training ↓↑	Contact Hours 📫	Instructor 11	Date 1.	Status 11	Approvals 1
				All	
Building Strong Relationships with Familiesonline	3.00	Tracey Bankhead	2023/05/01	Registered	OA-L1
POWER Ohlo CDA Training	6	test	2021/09/01	Verified	Non-OA
Developing Productive Relationships with Families, Schools and Communities by School-Age Administrators	3.00	Holly Scheibe	2021/07/01	Expires 2021/07/31	OA-L2
Pre-licensing Training for Family Child Care Providers	6.00	Rachael Moore	2021/07/01	Expires 2021/07/31	Non-OA
Child Care Pre-certification Orientation for In-Home Aides	1.00	Rachael Moore	2021/07/01	Expires 2021/07/31	Non-OA
How Do the Various Ohio Core Knowledge and Competency Documents Apply to Your Practice? Online	1.50	Holly Scheibe	2021/07/01	Expires 2021/07/31	OA-L2
ODE Orientation Training for Preschool and School Age Child Care (SACC) Staff Members: Early Learning	6.00	Christina Tomazinis	2021/06/30	No Show	Non-OA
Creating Leaders and Managing Staff for School-Age Program Administrators	2.00	Kimberly Shibley	2021/06/30	Expires 2021/07/30	OA-L2
ABC's	1.00	Holly Scheibe	2021/04/10	Registered	OA-L1
April 2 Test OA F2F	3.00	Kimberly Shibley	2021/04/02	Verified	OA-L1

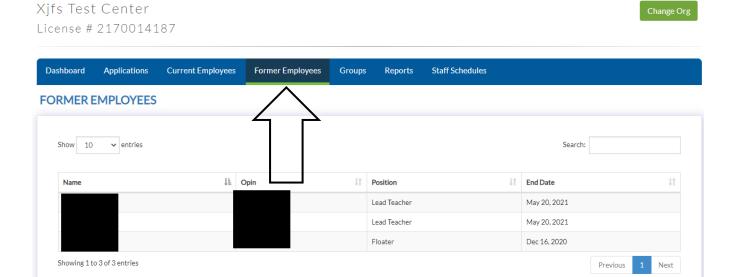
Clicking the Print Professional Development button, provides the administrator with a CSV file of the above content.

Opin	Last Name	First Name	Training	Hours	Instructor	Date	Status	Approvals	Highest Ed Major
11081527	Test	Mary Beth	Registry 1	2	Donna Ru	6/25/2014	Verified	Non-OA	Bachelor's Degree
11081527	Test	Mary Beth	2016 Ohio	OA: 4.5 In	OAEYC	4/21/2016	Verified	Ohio Appr	Bachelor's Degree
11081527	Test	Mary Beth	Ohio's Ap	2	Kimberly	12/25/2016	Verified	OA-L1	Bachelor's Degree
11081527	Test	Mary Beth	January 26	0.33	Holly Sche	4/12/2018	Verified	OA-L1	Bachelor's Degree
11081527	Test	Mary Beth	hybrid tes	6	Shell	5/31/2018	Verified	Ohio Appr	Bachelor's Degree
11081527	Test	Mary Beth	test cpr	1.25	Shell	10/1/2018	Verified	Non-OA	Bachelor's Degree
11081527	Test	Mary Beth	TEST - ODJ	1	Kelly Slad	1/9/2019	Verified	Non-OA	Bachelor's Degree
11081527	Test	Mary Beth	ECE test	6	suck my b	5/31/2019	Verified	Ohio Appr	Bachelor's Degree
11081527	Test	Mary Beth	test for tra	0		6/3/2020	Verified	Non-OA	Bachelor's Degree
11081527	Test	Mary Beth	Test AT fo	1.33	Kelly Slad	9/1/2020	Verified	OA-L1	Bachelor's Degree
11081527	Test	Mary Beth	Shelly Tes	3	Shelly Fra	9/1/2020	Verified	Non-OA	Bachelor's Degree



Former Employees Tab

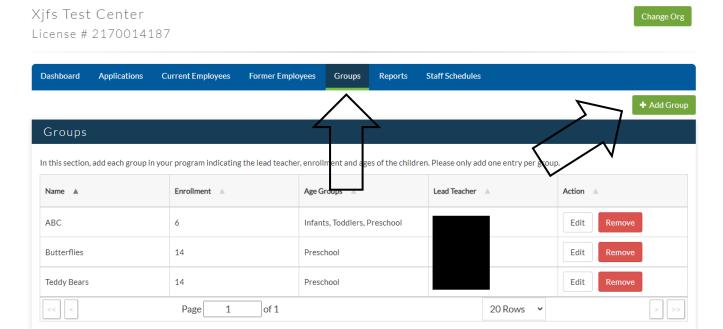
The Former Employees tab displays all past employees from that program. It lists their name, OPIN, position at the program and the employment end date.





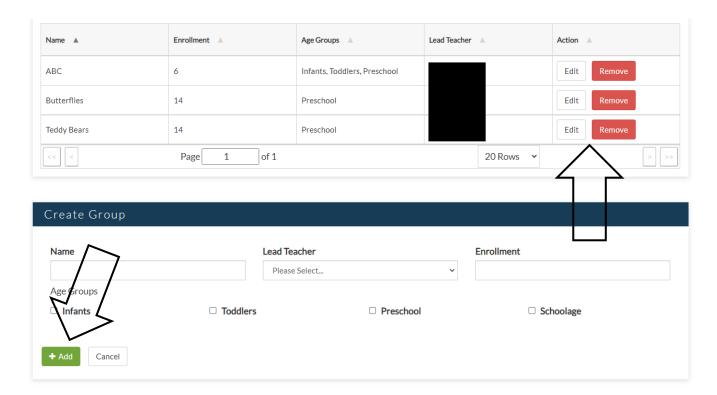
Groups Tab

This tab is an important tool that is required to be completed for the Employee Record Chart (ERC) licensing inspection tool. The information on each group will populate into the ERC. The program administrator will need to add each group in the program to the Organization Dashboard. It is important to note that each group only needs to be added once to this section. In addition, each group must have a unique name for the ERC.



Click Add Group to begin. The program administrator will add the group and include the name of the group, the lead teacher's name, number of children enrolled in the group and their age group. Click +Add to save the group. Please note: The program administrator will need to complete the information on each group in the program before they will be able to enter the staff's working schedule into Staff Schedules.





The program administrator can also edit or remove groups on this page and will need to make sure that groups and lead teacher assignments are kept updated for the ERC.



Reports Tab

This is the page where you will find three very important reports: the program summary report, the program detail report, and the Staff PD report.







The program summary report offers a PDF or CSV file download. Select a type for download and then press the button accordingly. The program summary report will show the programs basic information at the top and all the programs current employees listed below. If the program administrator sees professionals who no longer are employed at the program, they will need to end date that employment in the current employees tab. If there are employees missing from the report, it is most likely their employment record is incorrect and needs to be fixed so it will show on the program summary report. Program administrators should check this report often and be sure it is accurate and up to date.



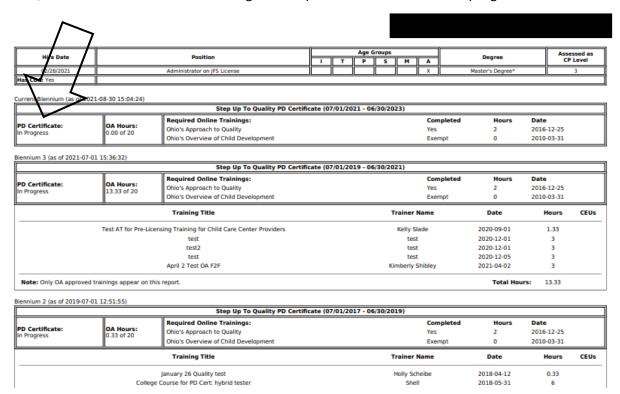
For each current professional working at the program, this report will show their name, OPIN, date of hire, current position(s) and the position history for each professional. The next column is the CPL columns which will show the previous and current biennium points and levels as well as the assessed as level. The highest degree verified in our registry system, Child Development Associate (CDA), Ohio Administrator Credential (ACL) Level and the School Age Endorsement level, if applicable. If there is an asterisk next to the document, it means it has been uploaded to the professional's profile, but the OPR staff have not reviewed that document yet. The date of hire, positions, and age groups worked are listed on the right of the screen.

			Positio															Licens	se Numb	ei.	217			37	
	Date of Hire	Current Position(s)	Role	Dates		CPL Previous Current Biennium Biennium		Current Biennium Assessed		Highest Verified Degree	CDA A	CL S	A Prev		SUTQ	Child	Curre		Group Name	,	Age T F	Gro	ups M	Τ	
- 1			1.0.0	- Julius	Points Level Points	Level	As	Degree			Hours	Tier		Dev.	Hours	Tier			١.	ľ	"				
			Floater	11/30/2020 - 12/16/2020								\top						П		П	\top	\top	Г	Ť	
	02/28/2021 Administrator on License		Cook	02/28/2021 - present																П			ı	ı	
			Owner	02/28/2021 - 03/05/2021																	П			ı	ı
		Administrator on IES	Administrator on JFS License	03/01/2021 - present				١.		Bachelor's			l							П			ı	ı	
02/					Floater	03/01/2021 - present	64.67	3	67.08	3		Degree	X		13.33 of 2	0	Yes	Exempt	0 of 20		Butterflies	П			ı
			Lead Teacher	03/03/2021 - present											l					П			ı	ı	
		ľ	Driver	03/04/2021 - 03/05/2021																П			ı	ı	
			Lead Teacher	04/06/2021 - present																					

An asterisk (*) indicates data not verified by OCCRRA



The program detail report will hold similar information as the summary; however, it will list all Ohio Approved trainings and show both the previous biennium and the current biennium PD certificates for each professional working at the program. The administrator can use this report 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 PD Certificate, the indicator on the left will change to completed status instead of in-progress status.





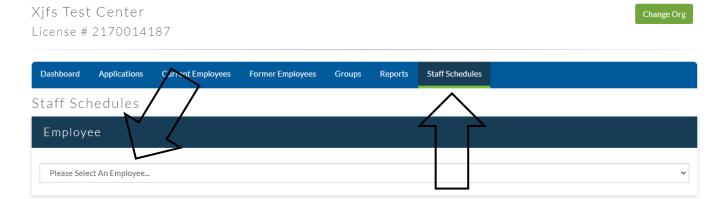
The PD report allows the program administrator to download a CSV file of either one employee or all employees verified by the program and see their verified professional development, including the training title, instructors name, hours, and approval type.

Opin	Last Name	First N	Nam	Training	Hours	Instructor	Date	Status	Approvals	
11081527	Test	Mary	Beth	Registry 1	2	Donna Rul	6/25/2014	Verified	Non-OA	
11081527	Test	Mary	Beth	2016 Ohio	OA: 4.5 In-	OAEYC	4/21/2016	Verified	Ohio Appr	oved
11081527	Test	Mary	Beth	Ohio's App	2	Kimberly :	12/25/2016	Verified	OA-L1	
11081527	Test	Mary	Beth	January 26	0.33	Holly Sche	4/12/2018	Verified	OA-L1	
11081527	Test	Mary	Beth	hybrid tes	6	Shell	5/31/2018	Verified	Ohio Appr	oved
11081527	Test	Mary	Beth	test cpr	1.25	Shell	10/1/2018	Verified	Non-OA	
11081527	Test	Mary	Beth	TEST - ODJ	1	Kelly Slad	1/9/2019	Verified	Non-OA	
11081527	Test	Mary	Beth	test for tra	0		6/3/2020	Verified	Non-OA	
11081527	Test	Mary	Beth	Shelly Tes	3	Shelly Fra	9/1/2020	Verified	Non-OA	
11081527	Test	Mary	Beth	Test AT fo	1.33	Kelly Slad	9/1/2020	Verified	OA-L1	
11081527	Test	Mary	Beth	Pre-licens	6	Rachael M	9/11/2020	Verified	Non-OA	
11081527	Test	Mary	Beth	Test 1-4	0		10/5/2020	Verified	Non-OA	
11081527	Test	Mary	Beth	another to	0		11/17/2020	Verified	Non-OA	
11081527	Test	Mary	Beth	test2	3	test	12/1/2020	Verified	Ohio Appr	oved
11081527	Test	Mary	Beth	test	3	test	12/1/2020	Verified	Ohio Appr	oved
11081527	Test	Mary	Beth	test	5	test	12/1/2020	Verified	Non-OA	
11081527	Test	Mary	Beth	test	3	test	12/5/2020	Verified	Ohio Appr	oved
11081527	Test	Mary	Beth	Child Care	6	Rachael M	12/18/2020	Verified	Non-OA	
11081527	Test	Mary	Beth	April 2 Tes	3	Kimberly 3	4/2/2021	Verified	OA-L1	



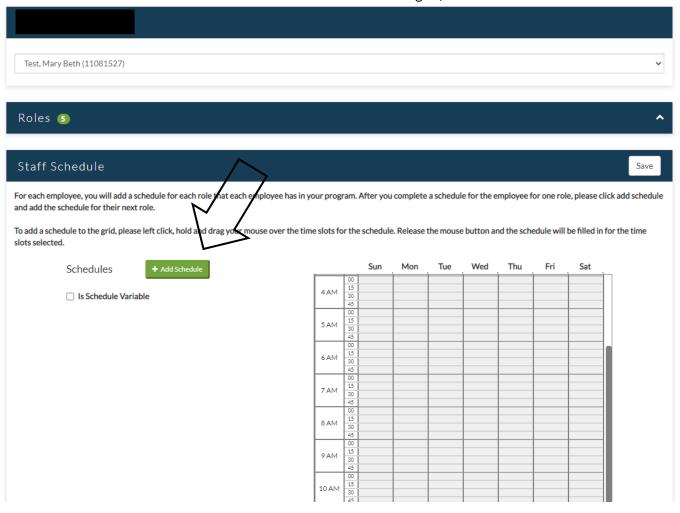
Staff Schedules Tab

The staff schedules tab is used for creating schedules for each of your staff members. This data goes into the Employee Record Chart and is a requirement to be completed. The program administrator would start with selecting an employee from the drop-down menu.



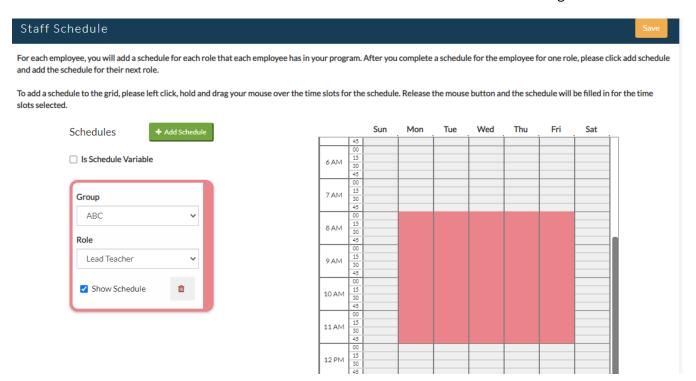


Once an employee is selected, the staff schedule appears. The roles are listed under an accordion drop-down and the staff schedule selector is below it. To add a schedule to the grid, first click +Add Schedule.



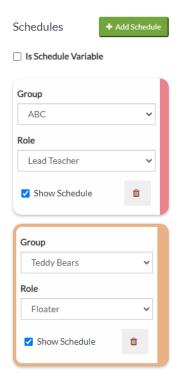


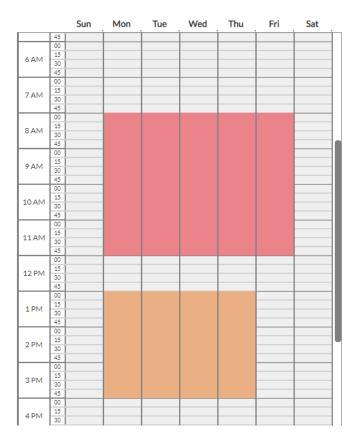
Then left click, hold, and drag the mouse over the time slots for the schedule. Release the mouse button and the schedule will be filled in for the time slots selected. The program administrator can un-select using this method also. The color on the card on the left matches the color on the schedule on the right.





Click Save to save the schedule or click +Add Schedule to add another schedule for a different role. The program administrator also has the option to remove the schedule by clicking the trash can on that schedule card.







Once saved, the program administrator can add another schedule by selecting a new name from the drop-down menu. The program administrator can tell there is a schedule on the current employee's tab as indicated by the clock icon, under the professional's name.

