Early Intervention Service Coordination Organization Dashboard User Guide

The Early Intervention Organization Dashboard is an Ohio Professional Registry (OPR) management tool. The dashboard supports management of the Early Intervention Agency staff. Supervisors and Program Managers can view the professional development and credentialing information of Service Coordinators and Developmental Specialist connected to their agency. This includes current credential status with expiration dates, additional licensure, completion of professional development, and various reports.

Access to the dashboard is permission-based. Only Supervisors and/or Program Managers will have access to the applicable agency dashboard. To request access, email ei@childrenandyouth.ohio.gov and provide your name, OPIN, agency, and role at the agency.

This document provides guidance and instructions for accessing and managing the Organization Dashboard and each tab within the dashboard. Click on any item below to view the guidance.
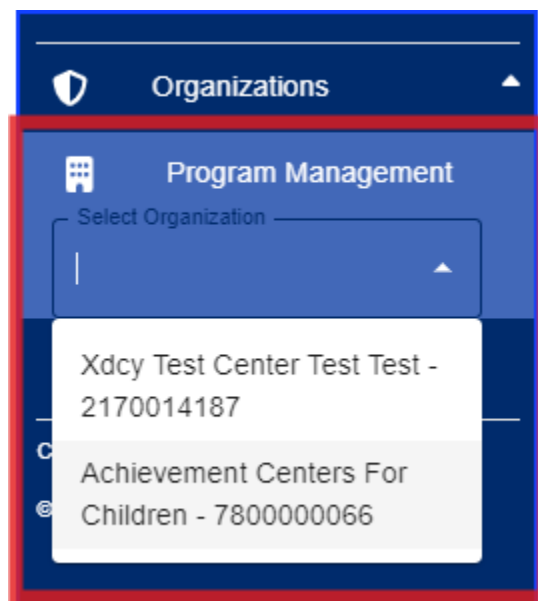
- Access the Organization Dashboard
- Employee Information
- Reports

Accessing the Organization Dashboard

To access the program's Organization Dashboard, click "Organizations" from the left-hand side menu to expand the Organization options.
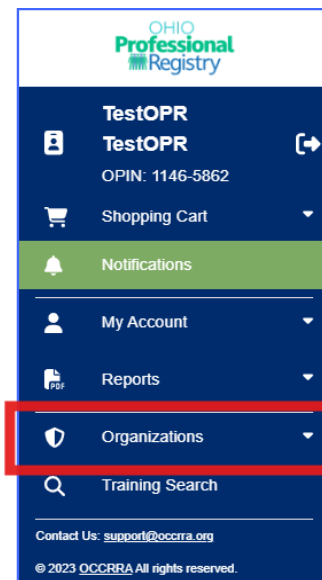
Click inside of the Program Management "Select Organization" box and select the program you want to manage.

The Organization Dashboard tabs are now visible in the left-hand menu (outlined below). The two features are Employees and Reports tab.
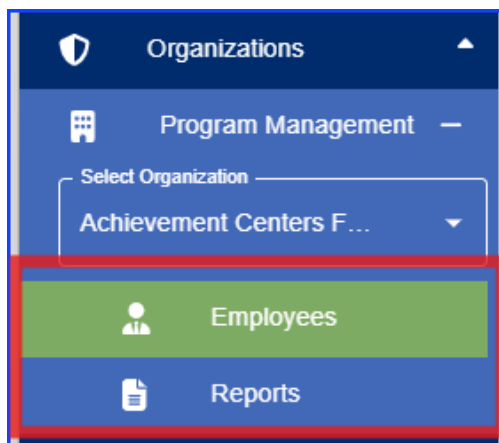
Employees Tab

The Employees tab allows administrators to view the professionals connected to their agency and consist of three tabs, Current Employees, Former Employees, and Pending Verification. When an Early Intervention professional adds their role at an agency, it will show up in the Organization Dashboard as pending verification. The administrator must verify employment to have access to the professional's credential or certification and professional development.

Current Employees

The Current Employees section of the Organization Dashboard shows all active **verified** employees at that agency. If an employee is not listed in the dashboard as pending or current, this indicates that they have not added the agency to the Employment tab of their OPR profile.

Administrators can view the employee's name, employment dates, position/role, current Early Intervention Credential, date awarded and expired, IMH credential if applicable, and Actions.

Click the three dots in the Actions column to display a menu of options. These include the following:

- View PD – opens a screen to view the employee's verified/completed professional development in their OPR profile
- View PD Plan – if your agency completes a PD Plan, it can be viewed here
- Print PD Report - print a report of the employee's completed professional development
- End Date Employment – select and complete for employees who are no longer employed

Former Employees

The Former Employees tab is a list of employees who are no longer working at the agency. The administrator will need to end date the employment to move the professional to the former employee tab. The employee can also end date their employment in their OPR account.

Follow these steps to end date the employment of a former employee.

1. Sign in to your OPR profile.
2. Select "Organizations" from menu panel on the left-hand side.
3. Select "Employees" from the drop-down menu.
4. Navigate to "Current Employees".
5. Search for employee name. Click on three dots under "Actions".
6. Select "End Date Employment".
7. Complete each field.
8. Select "Remove Employee".

Pending Verification

The Pending Verification tab provides a list of employees that require verification. If the professional is currently working at your program, select "Yes". This action will move the employee to the Current Employee tab. If the employee is not working at your agency, select "No".

NOTE: If there are no employees that need verified, you'll be taken directly to the Current Employees tab.

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CURRENT EMPLOYEES   FORMER EMPLOYEES   PENDING VERIFICATION

The following professionals have an open employment record in their profile indicating they work for this program. To manage your employees you must click either Yes or No indicating if they currently are employed at your program.

Employees must be accepted into the organization to be included in the dashboard and on the Program Summary and Program Detail reports and to be listed on the Groups and Staff Schedules screen.

Employee Name	Position	Reported Start Date	Verify
	Early Intervention Service Coordinator	2024-06-03	YES NO
	Early Intervention Service Coordinator	2025-06-02	YES NO

Reports Tab

The Reports tab allows administrators to access a variety of reports including an Agency Summary Report, Early Intervention Supervisor PD Report, and an Early Intervention Registry Transcripts Report. These reports allow administrators the ability to track their EI staff and the staff members' professional development.
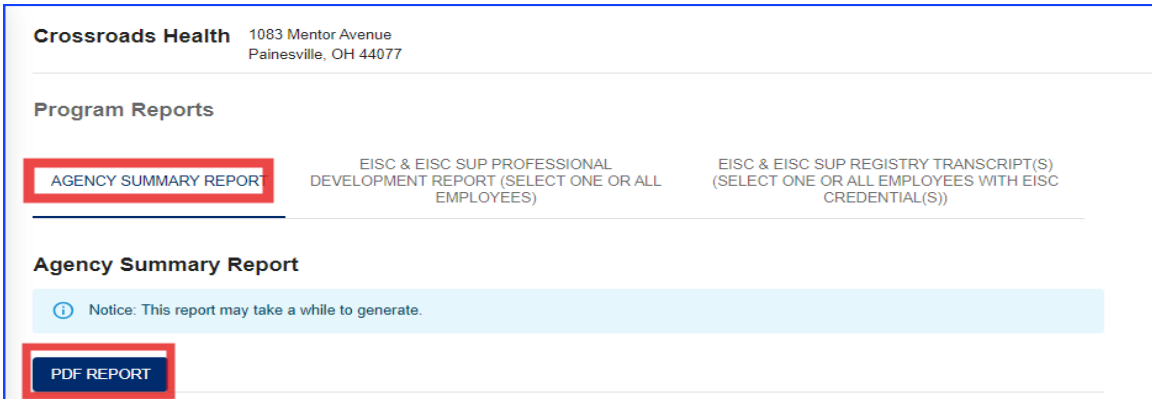
Accessing Reports

1. Sign in to your OPR profile.
2. Select the "Reports" tab from the menu panel on the left.
3. Select "Program Reports".
4. Click inside of the "Select Organization" box and select your agency.
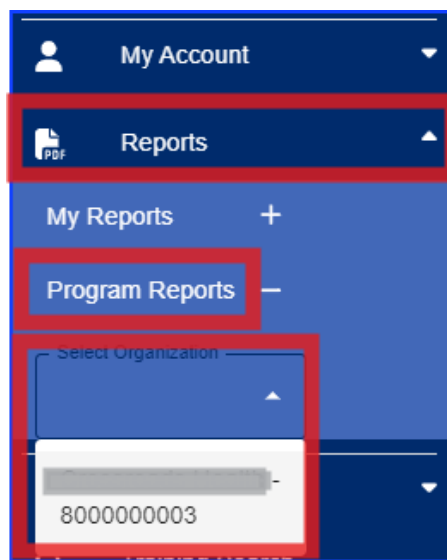
Agency Summary Report

The Agency Summary Report displays the data on all current verified employees from their OPR profile, including employment role, credential type with awarded date and expiration date, as well as verified education.
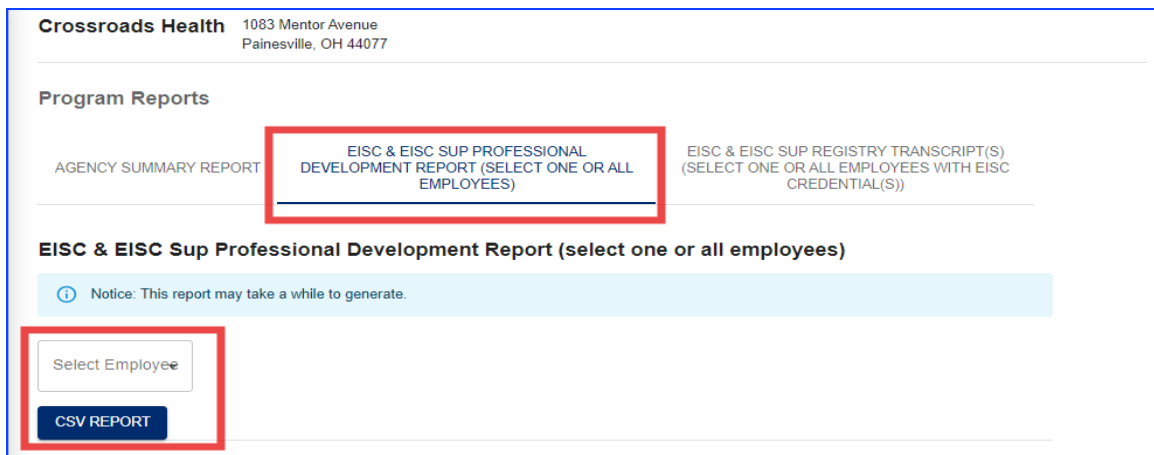

Early Intervention Supervisor PD Report

The Early Intervention Supervisor PD Report provides a CSV report of all PD completed by an employee. This report allows managers and supervisors to filter the information to support tracking PD completion and PD needs for the agency employees.

1. Click on the report title.
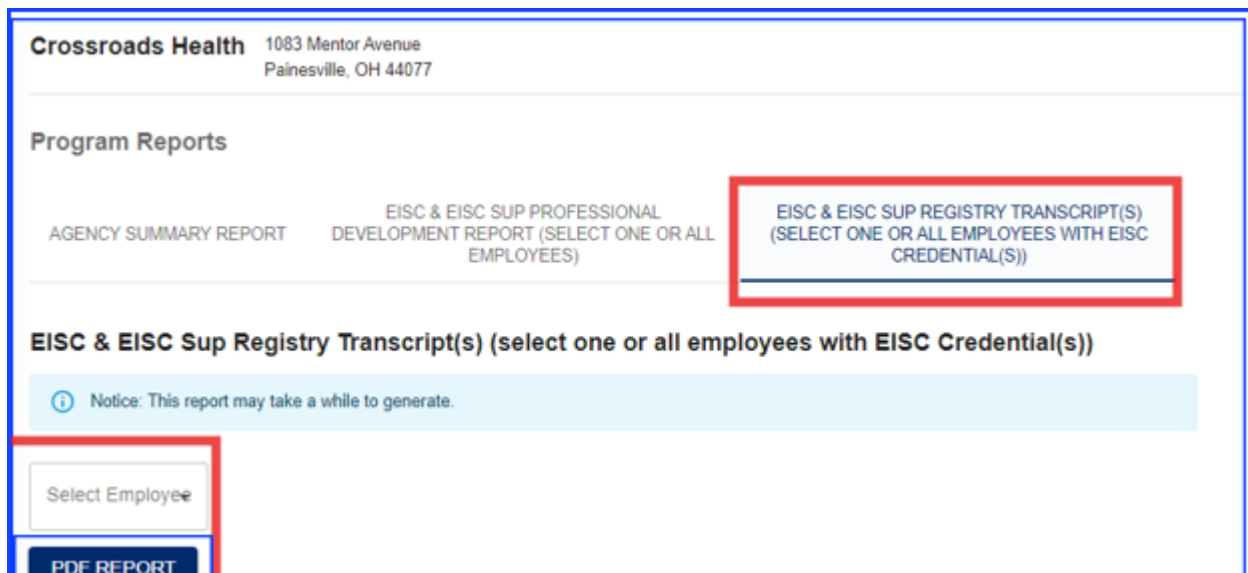2. Click on the Select Employee box and Select an Employee.

3. Click the CSV Report button.

Early Intervention Registry Transcripts Report

The Early Intervention Registry Transcripts Report provides a PDF report of all completed professional development. Administrators can select one employee or all employees.

1. Click on the report title.
2. Click on the Select Employee box and Select an Employee.
3. Click the PDF Report button.