
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.

[Rule 5180:2-12-07](#), outlines the documentation responsibilities for administrators in a license childcare regarding the Organization Dashboard. Information in this dashboard is directly pulled to the Employee Record Chart for licensing specialists to view.

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

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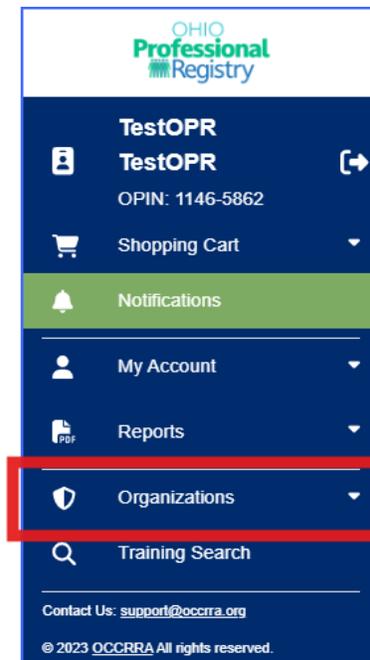
Requesting Organization Dashboard access

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

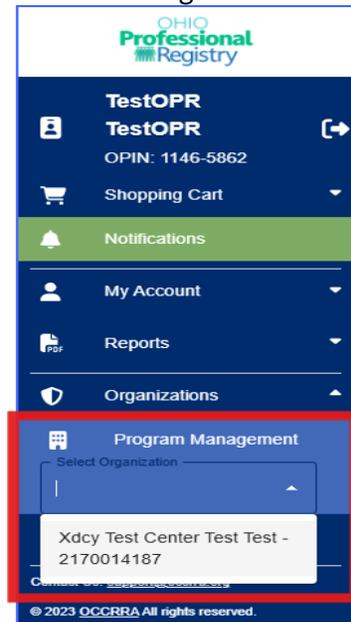
- For an Ohio Department of Education and Workforce (ODEW) program, your request must be on agency/company letterhead and include the name of the person needing access, their OPIN and the program license number. The requester must provide their name, OPIN, and role/title.
- For an Ohio Department of Children and Youth (DCY) program, your request must include the name of the person needing access, their OPIN and the program license number. The OPR will check our data provided from DCY/OCLQS 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 DCY Program license with the requester's name listed as administrator
 - o A letter on agency/company letterhead from the owner of the program stating access should be given to the requester.

Accessing the Organization Dashboard

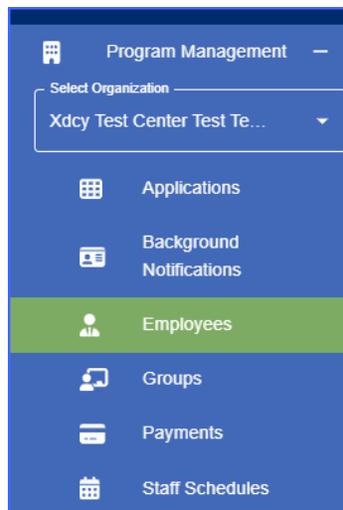
To access the program's Organization Dashboard, locate the Organizations tab and click the ▼ to open the Organizations options.



Click inside the Program Management box to Select Organization and select the program you wish to manage.



The Organization Dashboard tabs are now visible in the left-hand menu (outlined below).



If there are Employees that are **pending** verification, this will be the first page you see.

- If the professional is currently working at this program, select Yes.
- If the professional is not currently working at this program, select No and provide an end date.

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

The screenshot shows the Ohio Professional Registry interface. The left sidebar contains navigation options: TestOPR, Shopping Cart, Notifications, My Account, Reports, Organizations, Program Management, Select Organization (Xdcy Test Center Test Te...), Applications, Background Notifications, Employees (highlighted), Groups, Payments, and Staff Schedules. The main content area is titled 'Xdcy Test Center Test Test' with address and license information. Below this are tabs for 'CURRENT EMPLOYEES', 'FORMER EMPLOYEES', and 'PENDING VERIFICATION' (highlighted). A message states: '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.' A table lists one employee: TestOPR TestOPR, Administrator on JFS License, 2025-09-01. A 'Verify' column contains 'YES' and 'NO' buttons (both highlighted).

Employee Name	Position	Reported Start Date	Verify
TestOPR TestOPR	Administrator on JFS License	2025-09-01	<input type="button" value="YES"/> <input type="button" value="NO"/>

Current Employees

The Current Employees section of the Organization Dashboard shows all active verified employees at that program.

The columns include: Employee name, OPIN, Employment dates, Position/Role, CPL, PD complete/required, Completed PD topics, and Actions.

The clock indicator next to the name of the professional shows they have a staff scheduled entered.

The ▼ next to a professional's name indicates they have additional roles at that program. Select the ▼ to display additional roles.

Employee Name	Employment	Position	CPL	PD	Upcoming Ohio Approvals	Actions
ODJFSCenter, Lead 1124-9325	2014-01-05 to Present	Lead Teacher	Current CPL: Level 1 9.49 Points Previous CPL: Level 1 9.49 Points Assessed CPL 1	Current PD: Tier 0 0.00 of 20 Previous PD: Level 0 0.00 of 20 Assessed PD 0		...
ODJFSCenter, Admin 1124-9323	2015-09-16 to Present	Administrator on JFS License	Current CPL: Level 1 7.79 Points Previous CPL: Level 1 7.79 Points Assessed CPL 1	Current PD: Tier 0 0.00 of 20 Previous PD: Level 0 0.00 of 20 Assessed PD 0		VIEW PD VIEW PD PLAN PRINT PD REPORT NEW HIRE CHECKLIST END DATE EMPLOYMENT

On the right of each employee in the list, the three dots in the **Actions** column will open a menu of options to select, including:

PD – (Professional Development/training) -View PD, Print PD Report

End Date Employment – Administrators can end date employees who are no longer with the program.

New Hire Checklist – this checklist will pull in staff requirements, such as trainings and health and safety training expiration dates, directly from the professional's OPR profile. It will also allow the administrator to enter medical completion dates and background check expiration dates for the administrator to view and monitor compliance.

New Hire Checklist Guidance:

- Enter the date in the date box for each item that you can confirm, and then checkmark the box on the left to indicate that it is complete.
- Health and Safety required trainings that have been verified in a professional’s profile will auto-populate in there checklist (CPR, First Aid, Communicable Disease, Child Abuse). Check mark in the box on the left to confirm completion.

Test for Occrra - Jfscenter 2760 Airport Drive, Suite 160
License #: 9999999900 Columbus, OH 43219-0000

NEW HIRE CHECKLIST

Ohio Department of Children and Youth employee records and profiles in the Ohio Professional Registry (OPR) are required to be updated as needed, but within five calendar days of any change. Use this New Hire Checklist to keep track of licensing and SUTQ requirements for each professional at your program. Items verified in the employee's profile will populate into the checklist automatically, if the item is not yet uploaded and verified the fields are not editable. Other fields are available to enter dates.

Please Note: This checklist may not fully encompass all rule requirements. Additional requirements may exist based on staff roles.

Lead ODJFSCenter 1124-9325, Lead Teacher 2014-01-05

On First Day of Employment

- Current background check for this program license number
- Highest verified education
- Medical statement on file
- Tdap documentation
- Transporting children?

mm/dd/yyyy

mm/dd/yyyy

mm/dd/yyyy

The Former Employees tab shows employees who have an end date for a record at that program.

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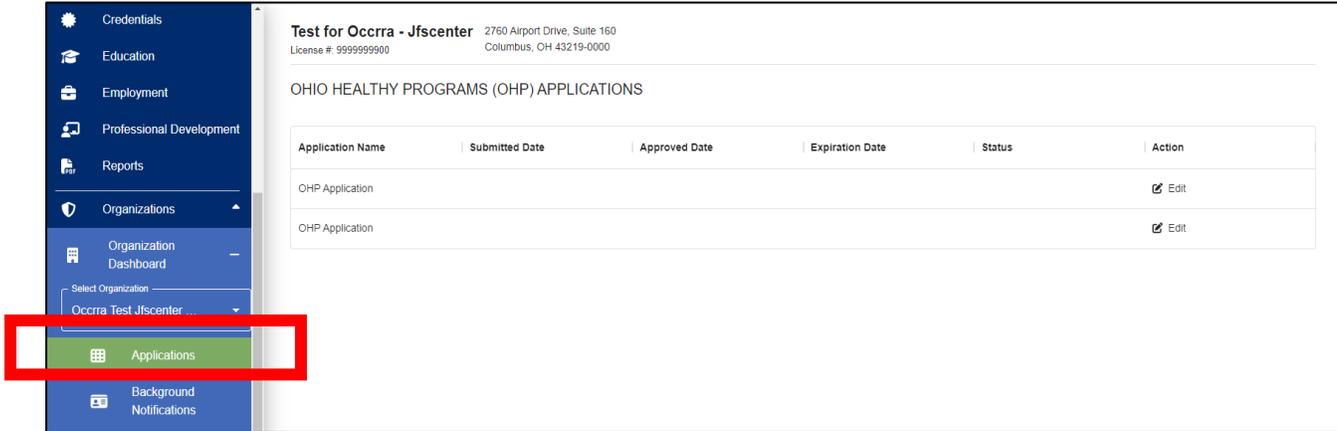
CURRENT EMPLOYEES **FORMER EMPLOYEES** PENDING VERIFICATION

Name	OPIN	Position	End Date
		Driver	2022-10-18
		Individual Service Provider Not Used in Ratio	2022-08-01
		Floater	2022-08-12
		Owner	2012-10-12
		Assistant Teacher	2022-06-28
		Assistant Teacher	2023-05-19

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Applications

The Applications section is for programs interested in applying for the Ohio Healthy Programs, or other available OCCRRA initiatives for programs if available.

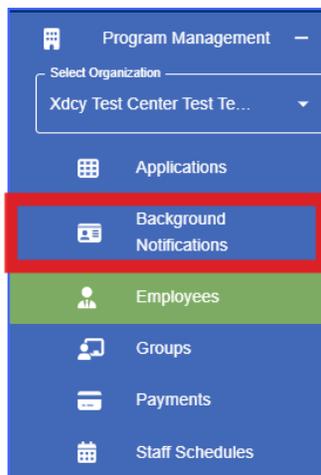


The screenshot shows the 'Applications' section of the Ohio Professional Registry. The left sidebar contains a navigation menu with the following items: Credentials, Education, Employment, Professional Development, Reports, Organizations (expanded), Organization Dashboard, Select Organization, Occrra Test Jfscenter, Applications (highlighted with a red box), and Background Notifications. The main content area displays the organization 'Test for Occrra - Jfscenter' with its address and license number. Below this, the section is titled 'OHIO HEALTHY PROGRAMS (OHP) APPLICATIONS' and contains a table with two rows of application data.

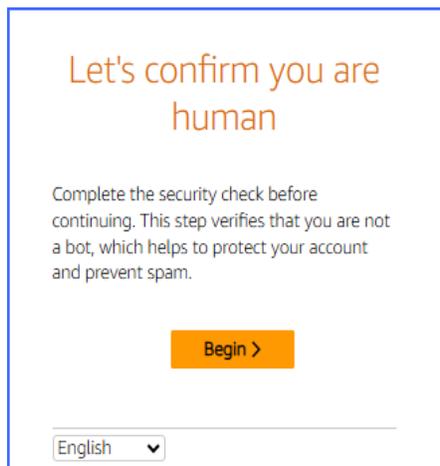
Application Name	Submitted Date	Approved Date	Expiration Date	Status	Action
OHP Application					Edit
OHP Application					Edit

Background Notifications

Opens a new tab to display this program's background check notifications.



Complete the security check



A list of background checks for your verified employees will display. Use the filters at the top of each column for specific search.



Click on the  on the right to open, view, and/or print the DCY 01176 form.

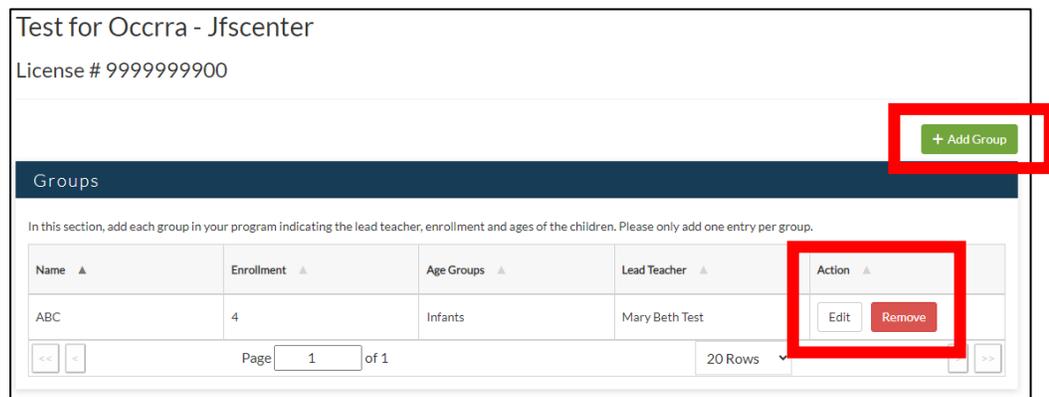
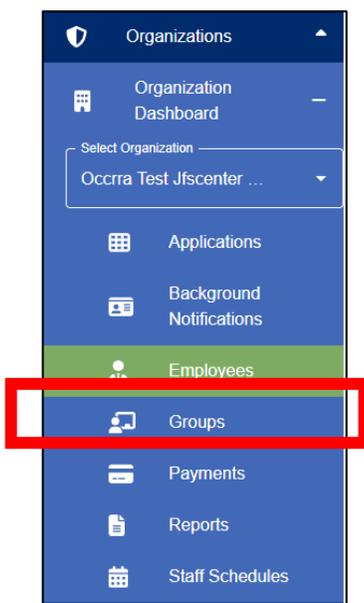
Form	Professional	Program	Status	Submit...	Compl...	Expira...	
(363726) JFS 01176 (program)		Test for Occrra - Jfscenter (9999999900)	Eligible	7/28/2023	6/9/2023	6/9/2028	
(363576) JFS 01176 (program)		Test for Occrra - Jfscenter (9999999900)	Eligible	7/27/2023	6/9/2023	6/9/2028	
(363577) JFS 01176 (program)		Test for Occrra - Jfscenter (9999999900)	Eligible	7/27/2023	6/9/2023	6/9/2028	
(336396) Cancellation Notification (program)		Test for Occrra - Jfscenter (9999999900)	Cancelled	3/28/2023	5/12/2023		

Administrators who have Organization Dashboard access will receive a notification in their OPR profile when a DCY01176 form is completed.

Groups

Opens a new tab to display this program’s groups. Groups is connected to 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.

NOTE: each group only needs to be added once to this section AND each group must have a unique name for the ERC.



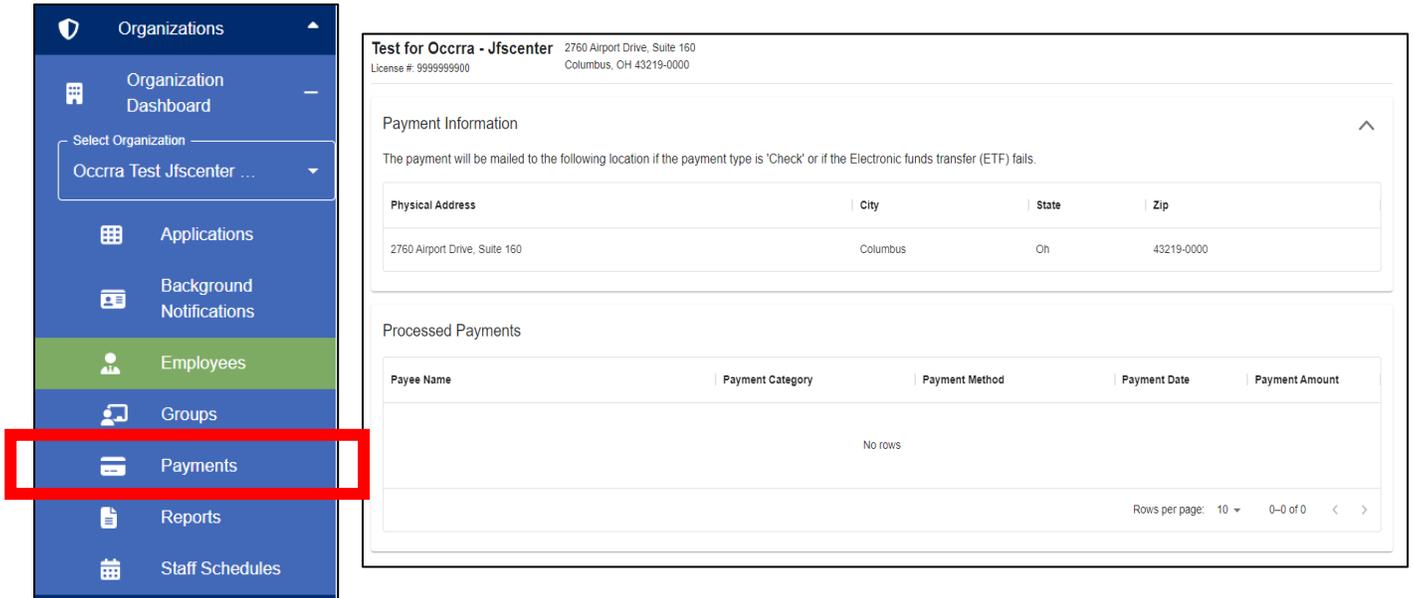
- Click Add Group to begin. The program administrator will add the group and include the name of the group, the lead teacher’s name, number of children enrolled in the group and their age group.
- Click +Add to save the group.

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.

Payments

Displays any payments made to that program for various OCCRRA initiatives.



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Payment Information

The payment will be mailed to the following location if the payment type is 'Check' or if the Electronic funds transfer (ETF) fails.

Physical Address	City	State	Zip
2760 Airport Drive, Suite 160	Columbus	Oh	43219-0000

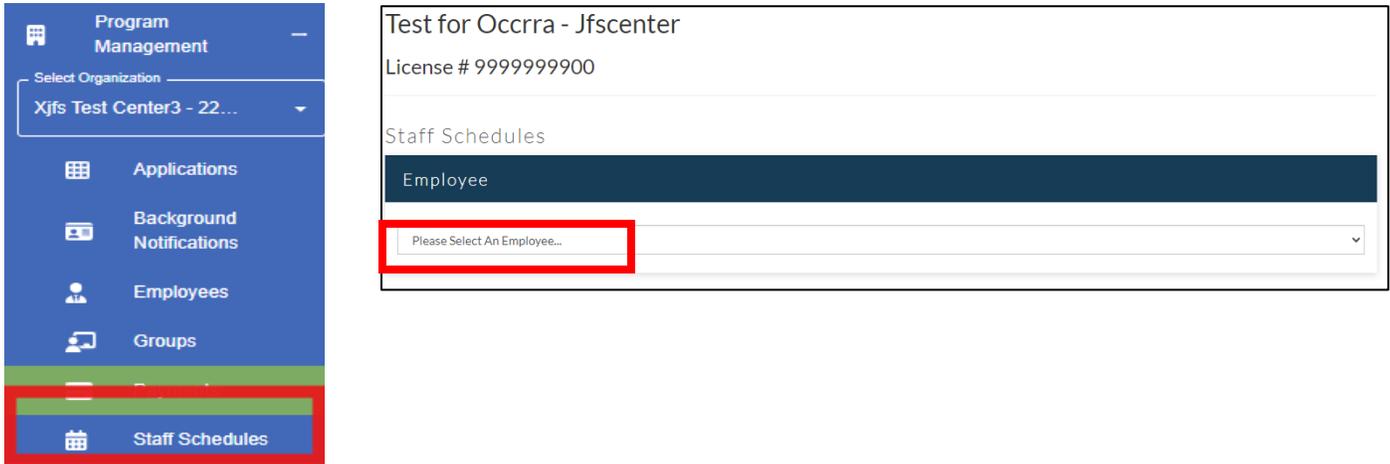
Processed Payments

Payee Name	Payment Category	Payment Method	Payment Date	Payment Amount
No rows				

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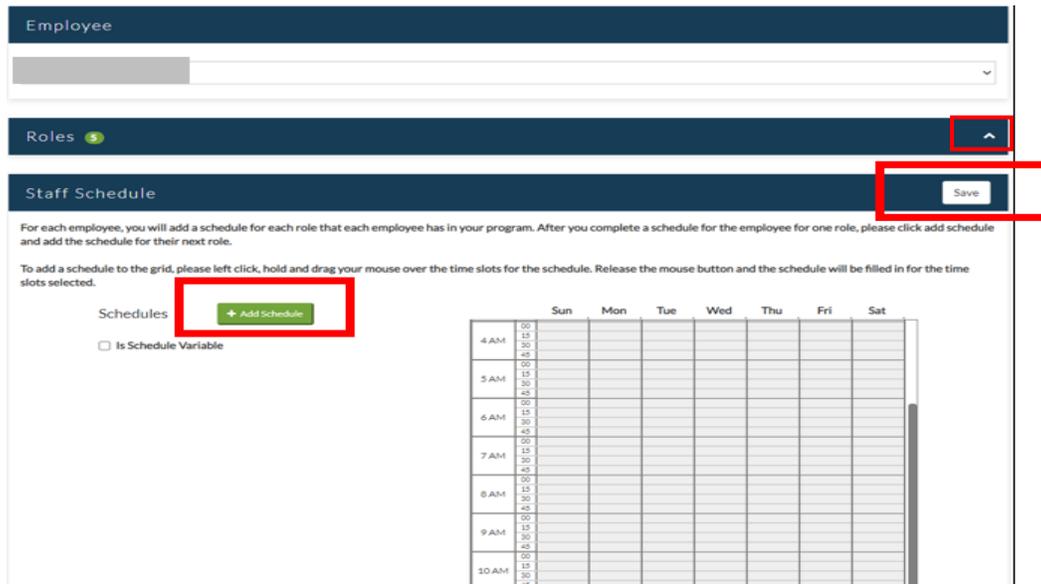
Staff Schedules

Opens a new tab to display the staff scheduling tool. This page 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 tool appears. The roles are listed under an accordion drop-down and the staff schedule selector is below it.

1. To add a schedule to the grid, first click +Add Schedule.



- Left click on your computer mouse, 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.

Staff Schedule Save

For each employee, you will add a schedule for each role that each employee has in your program. After you complete a schedule for the employee for one role, please click add schedule and add the schedule for their next role.

To add a schedule to the grid, please left click, hold and drag your mouse over the time slots for the schedule. Release the mouse button and the schedule will be filled in for the time slots selected.

Schedules + Add Schedule

Is Schedule Variable

Group
ABC

Role
Lead Teacher

Show Schedule 🗑️

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
6 AM							
7 AM							
8 AM							
9 AM							
10 AM							
11 AM							
12 PM							

- 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.

Schedules + Add Schedule

Is Schedule Variable

Group
ABC

Role
Lead Teacher

Show Schedule 🗑️

Group
Teddy Bears

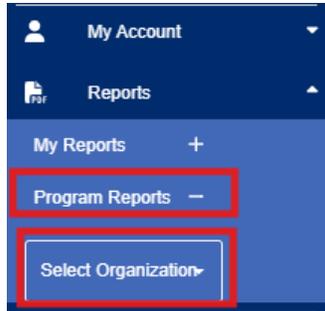
Role
Floater

Show Schedule 🗑️

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
6 AM							
7 AM							
8 AM							
9 AM							
10 AM							
11 AM							
12 PM							
1 PM							
2 PM							
3 PM							
4 PM							

Reports

1. Program Reports are accessed via the Reports tab in your profile.
2. Click on the Reports tab from the menu panel in your profile.
3. Click on the + next to Program Reports
4. Click inside the Select Organization box
5. Select your Organization



Click on each report tab to view and/or print the report.

Xjfs Test Center3 123 Test Lane
License #: 2230028095 Chillicothe, OH 45644

Program Reports

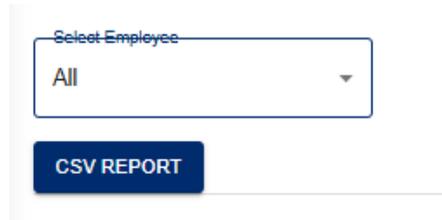
[PROGRAM SUMMARY REPORT](#) [PROGRAM DETAIL REPORT](#) [PROFESSIONAL DEVELOPMENT REPORT](#) [EXPIRING REQUIRED TRAININGS REPORT](#) [PROGRAM CHECKLIST REPORT](#)

Program Summary Report

ⓘ Notice: This report may take a while to generate.

PDF REPORTCSV REPORT

Professional Development Report - (CSV): Professional Development (PD) information for each professional. Select an employee to be provided with a CSV file of their PD.



Expired Required Trainings Report - This report shows the expiration dates for required licensing health and safety trainings—CPR, First Aid, Communicable Disease, and Child Abuse—for current employees.

* Only employees whose training has already expired or will expire within the next 90 days are included.

* The report is a point-in-time snapshot based on the date it is run.

Program Checklist Report – (PDF or CSV) view and/or print the New Hire Checklist information from all employees at the program. At least one employee must have a completed/saved checklist for this report to list any information.

For more information, please view our website ([Program Administrator](#)).

If you have additional questions, contact us at support@occrra.org.