

# 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.

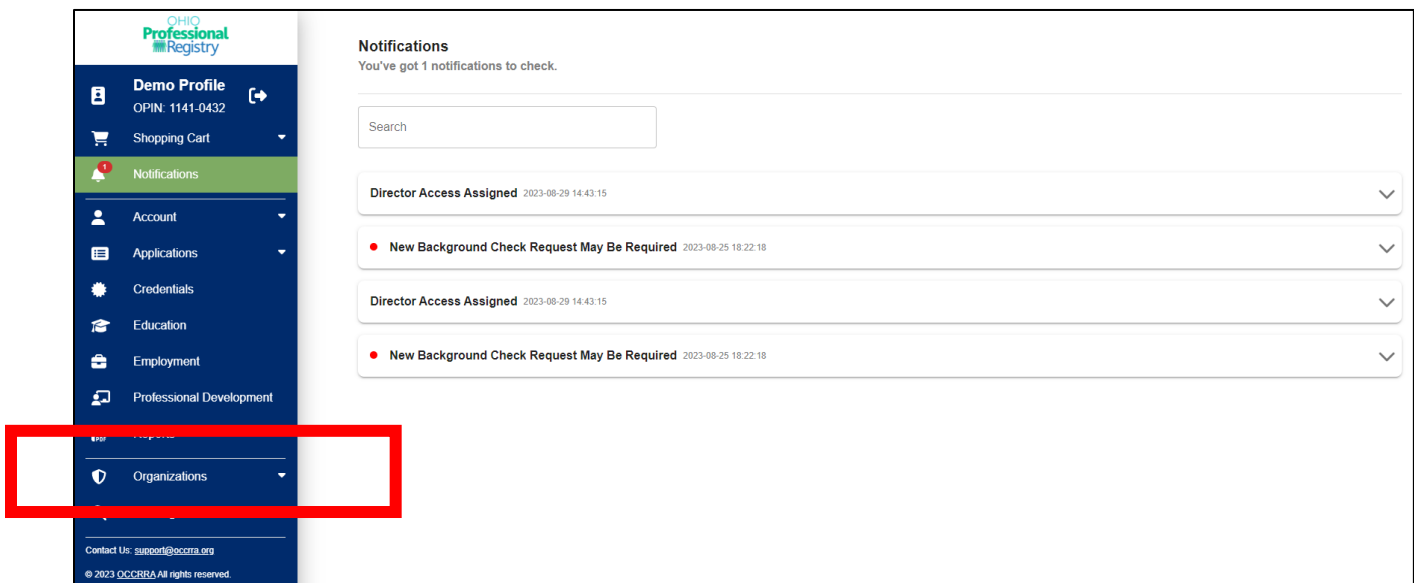
## Requesting Organization Dashboard access

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

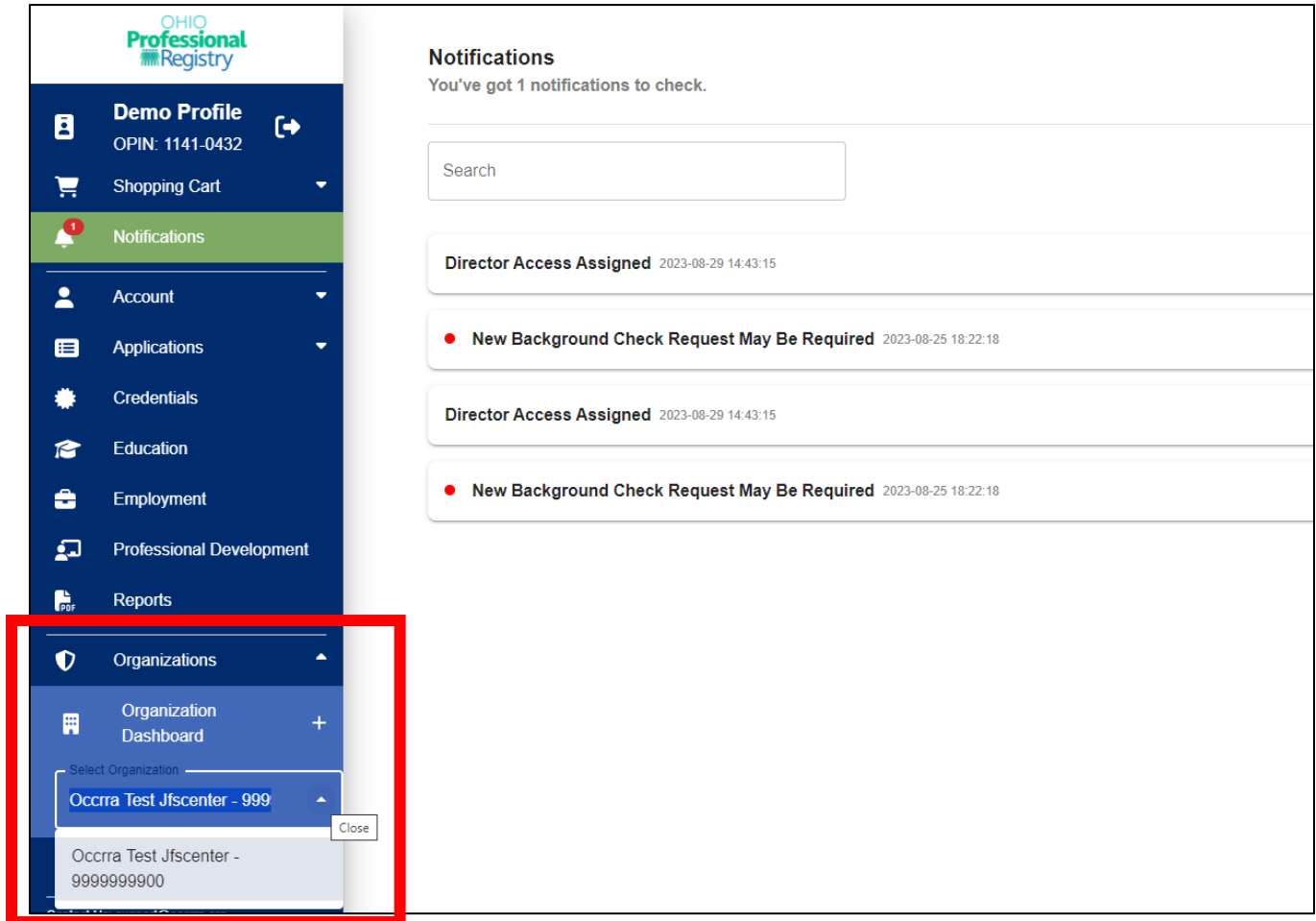
- For an Ohio Department of Education (ODE) program, your request must be on school letterhead and include the name of the requestor, OPIN of the requestor and the program license number needing access to.
- For an Ohio Department of Job and Family Services (ODJFS) program, your request must include 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
  - o 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, click the Organizations carrot from the left-hand side menu to expand the Organizations options.



Select the program you wish to manage from the drop-down menu.



The screenshot displays the Ohio Professional Registry user interface. On the left is a dark blue navigation sidebar with the following items: Demo Profile (OPIN: 1141-0432), Shopping Cart, Notifications (highlighted in green), Account, Applications, Credentials, Education, Employment, Professional Development, and Reports. Below these is the 'Organizations' section, which is highlighted with a red box. It includes an 'Organization Dashboard' and a dropdown menu titled 'Select Organization'. The dropdown menu is open, showing 'Occrra Test Jfscenter - 999' as the selected item, with a 'Close' button next to it. Below the dropdown, another entry 'Occrra Test Jfscenter - 9999999900' is visible. On the right side of the page, the 'Notifications' section is titled 'Notifications' and states 'You've got 1 notifications to check.' Below this is a search bar and a list of notifications. The notifications include 'Director Access Assigned' (dated 2023-08-29 14:43:15) and 'New Background Check Request May Be Required' (dated 2023-08-25 18:22:18).

If there are Employees that are pending verification, this will be the first page you see. If there are no employees that need verified, you'll be taken directly to the Current Employees tab. The Organization Dashboard tabs are now visible in the left-hand menu (outlined below).

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 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.

The screenshot displays the 'Test for Occrra - Jfscenter' interface. The left-hand navigation menu is highlighted with a red box and includes the following items: Credentials, Education, Employment, Professional Development, Reports, Organizations, and Organization. The 'Employees' item is highlighted in green. The main content area shows the 'PENDING VERIFICATION' tab selected. Below the tab are instructions: '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
[REDACTED]	Assistant Teacher	2022-07-01	<input type="button" value="YES"/> <input type="button" value="NO"/>
[REDACTED]	Assistant Teacher	2020-08-15	<input type="button" value="YES"/> <input type="button" value="NO"/>
[REDACTED]	Assistant Teacher	2022-08-24	<input type="button" value="YES"/> <input type="button" value="NO"/>
[REDACTED]	Lead Teacher	2022-09-27	<input type="button" value="YES"/> <input type="button" value="NO"/>
[REDACTED]	Assistant Teacher	2022-10-31	<input type="button" value="YES"/> <input type="button" value="NO"/>
[REDACTED]	Assistant Teacher	2022-06-13	<input type="button" value="YES"/> <input type="button" value="NO"/>
[REDACTED]	Administrator on JFS License	2023-01-22	<input type="button" value="YES"/> <input type="button" value="NO"/>
[REDACTED]	Assistant Teacher	2023-05-16	<input type="button" value="YES"/> <input type="button" value="NO"/>
[REDACTED]	Substitute	2023-05-26	<input type="button" value="YES"/> <input type="button" value="NO"/>

## Current Employees



The current employees' section of the Organization Dashboard shows all employees currently listed with open employment at that program. All components for program management are listed on the current employee's section. Click the three dots in the Actions column, to display additional components including PD components and end date employment.

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

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

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

CURRENT EMPLOYEES FORMER EMPLOYEES PENDING VERIFICATION

Employee Name	Employment	Position	CPL	PD	Upcoming Ohio Approved Trainings	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 <a href="#">Assessed CPL 1</a>	Current PD: Tier 0 0.00 of 20 Previous PD: Level 0 0.00 of 20 <a href="#">Assessed PD 0</a>	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 <a href="#">Assessed CPL 1</a>	Current PD: Tier 0 0.00 of 20 Previous PD: Level 0 0.00 of 20 <a href="#">Assessed PD 0</a>	0	<ul style="list-style-type: none"> <li><a href="#">VIEW PD</a></li> <li><a href="#">VIEW PD PLAN</a></li> <li><a href="#">PRINT PD REPORT</a></li> <li><a href="#">END DATE EMPLOYMENT</a></li> </ul>
			Current CPL: Level 1 2.01 Points	Current PD: Tier 0 0.00 of 20		

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

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

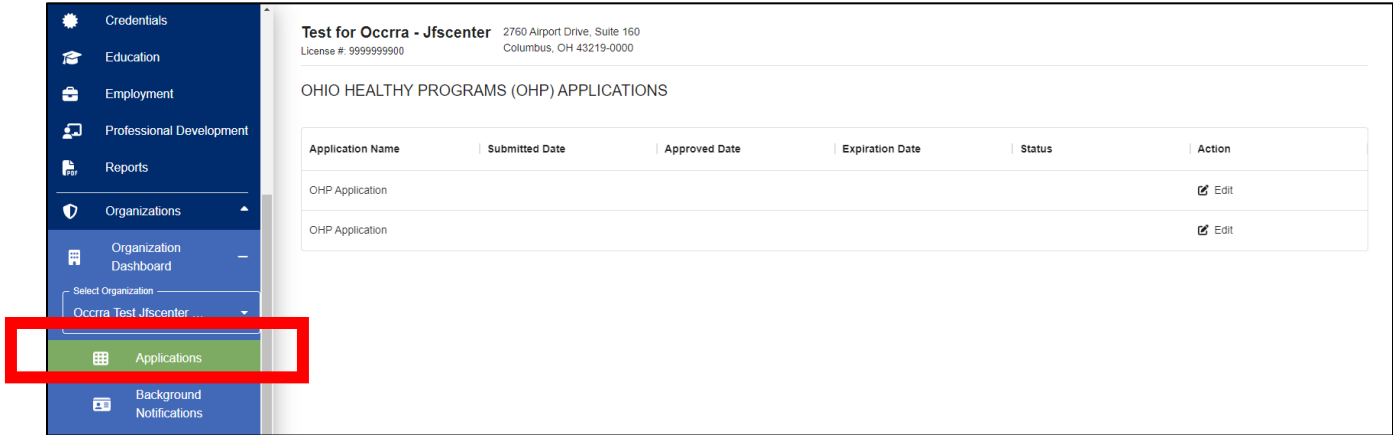
CURRENT EMPLOYEES **FORMER EMPLOYEES** PENDING VERIFICATION

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

Rows per page: 10 1-6 of 6 < >

## Applications

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



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

OHIO HEALTHY PROGRAMS (OHP) APPLICATIONS

Application Name	Submitted Date	Approved Date	Expiration Date	Status	Action
OHP Application					<a href="#">Edit</a>
OHP Application					<a href="#">Edit</a>

### Background Notifications

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

- Organizations
  - Organization Dashboard
  - Select Organization: Occrra Test Jfscenter ...
- Applications
- Background Notifications**
- Employees
- Groups
- Payments
- Reports
- Staff Schedules

Welcome to the OPR Background Check Module Ohio Department of Job and Family Services

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		

## 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. 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.



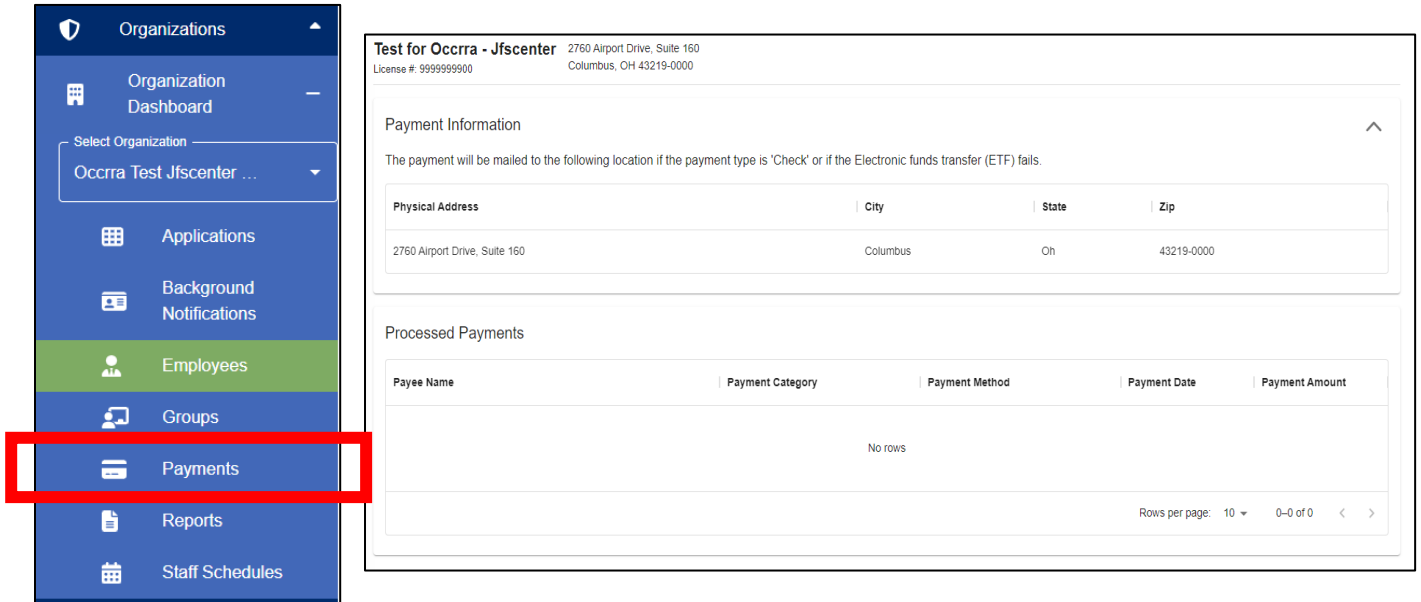
Name ▲	Enrollment ▲	Age Groups ▲	Lead Teacher ▲	Action ▲
ABC	4	Infants	Mary Beth Test	<input type="button" value="Edit"/> <input type="button" value="Remove"/>

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.



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

**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				

Rows per page: 10 0-0 of 0



## Reports Tab

Any program data reports will be displayed here. Currently three reports are available for a program administrator.



The screenshot shows the Ohio Professional Registry interface. On the left is a blue sidebar with navigation options: Organization Dashboard, Select Organization (Occrra Test Jfscenter ...), Applications, Background Notifications, Employees, Groups, Payments, Reports (highlighted with a red box), and Staff Schedules. The main content area displays the 'Test for Occrra - Jfscenter' report selection screen. It includes the license number 9999999900 and address 2750 Airport Drive, Suite 150, Columbus, OH 43219-0000. Under the 'Report Name' section, there are three report options: 'Program Summary Report' with PDF and CSV report buttons, 'Program Detail Report' with a PDF report button, and 'Professional Development Report' with a dropdown menu set to 'All' and a CSV report button.

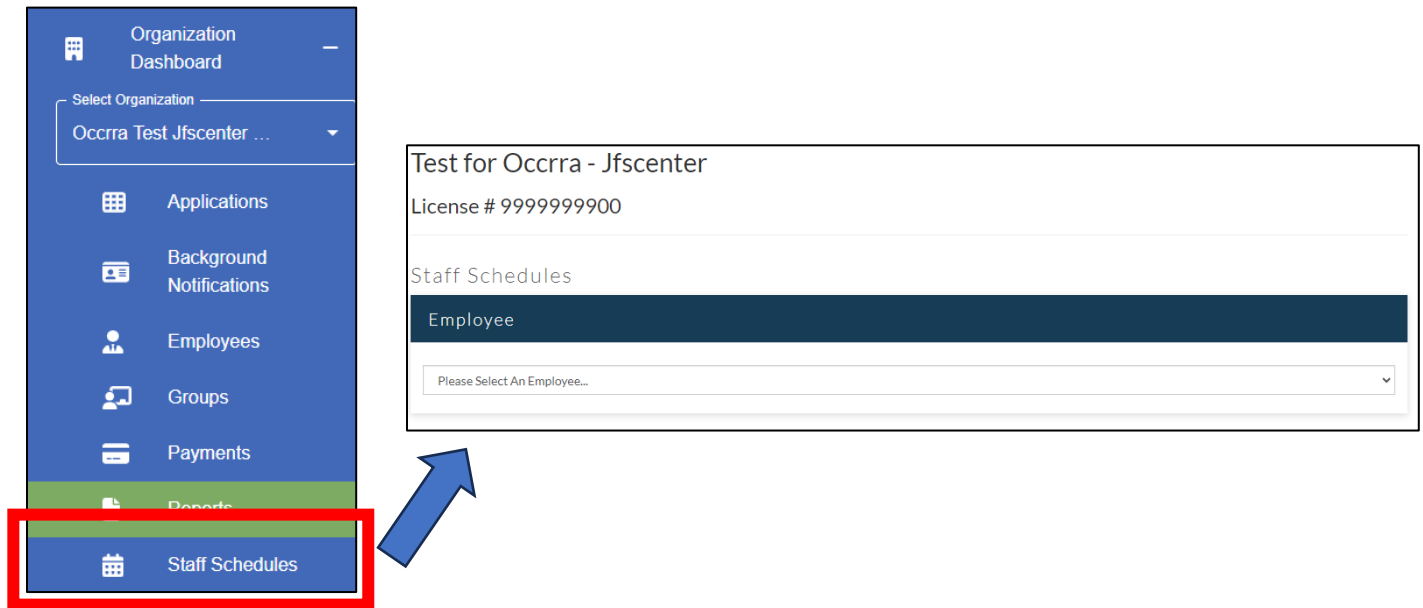
Program Summary Report (PDF or CSV): basic professional information in an easy-to-read layout. Components from the Current Employees tab are listed out on this report.

Program Detail Report (PDF): PD Certificate information for each professional at that program

Professional Development Report (CSV): Professional Development (PD) information for each professional. Select one employee or select all to be provided a CSV file of their PD.

## Staff Schedules

Opens a new tab to display the staff scheduling tool. The staff schedules 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. To add a schedule to the grid, first click +Add Schedule.

Employee

Roles 5

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

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
4 AM	00						
	15						
	30						
	45						
5 AM	00						
	15						
	30						
	45						
6 AM	00						
	15						
	30						
	45						
7 AM	00						
	15						
	30						
	45						
8 AM	00						
	15						
	30						
	45						
9 AM	00						
	15						
	30						
	45						
10 AM	00						
	15						
	30						
	45						

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.

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
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							

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
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							
00							
15							
30							
45							