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.

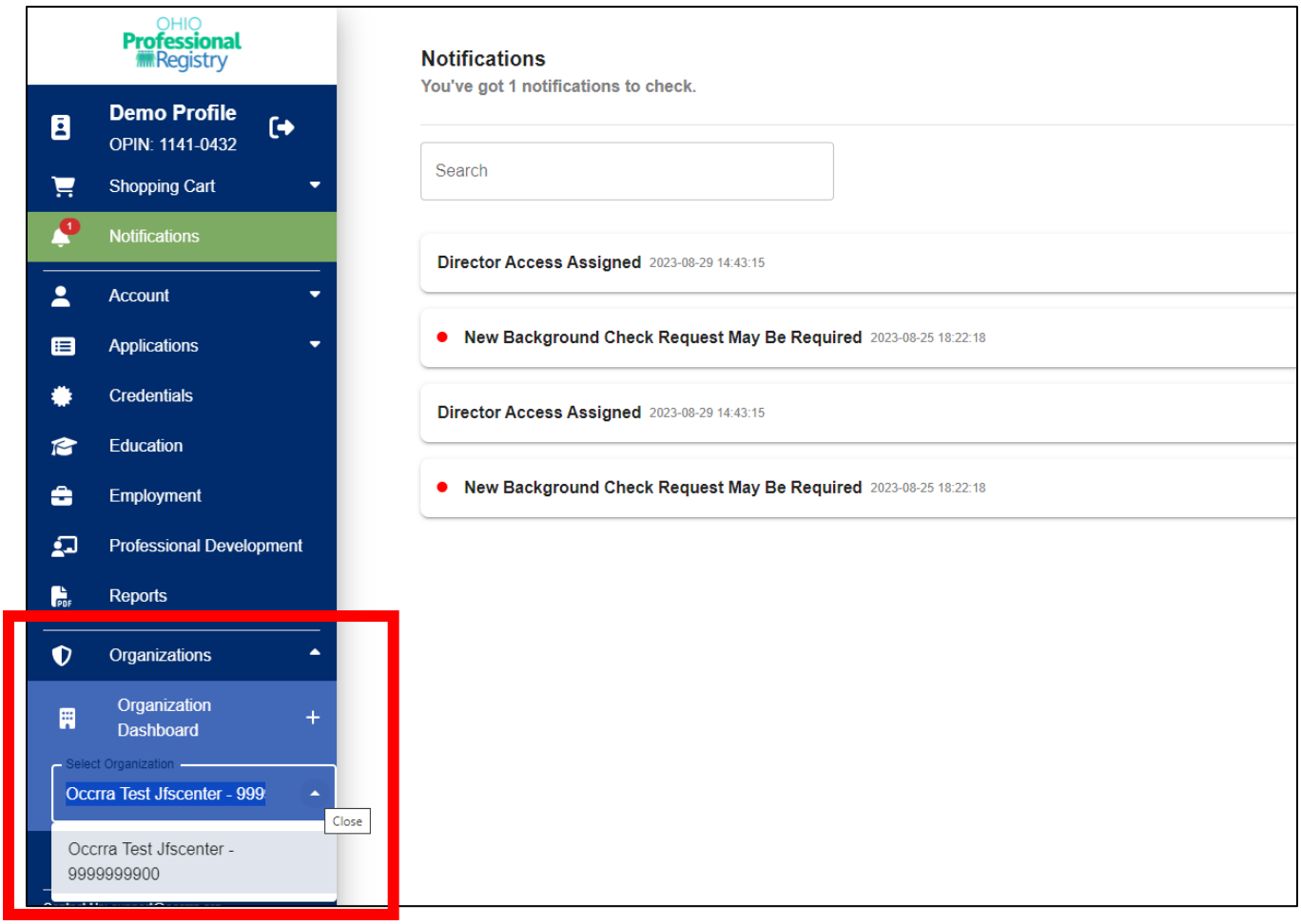
- For an Ohio Department of Education (ODE) program, your request must be on school letterhead and include the name of the requestor, OPIN of the requestor and the program license number needing access to.
- For an Ohio Department of Job and Family Services (ODJFS) program, your request must include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

© 2021 OCCRRA. All rights reserved.

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



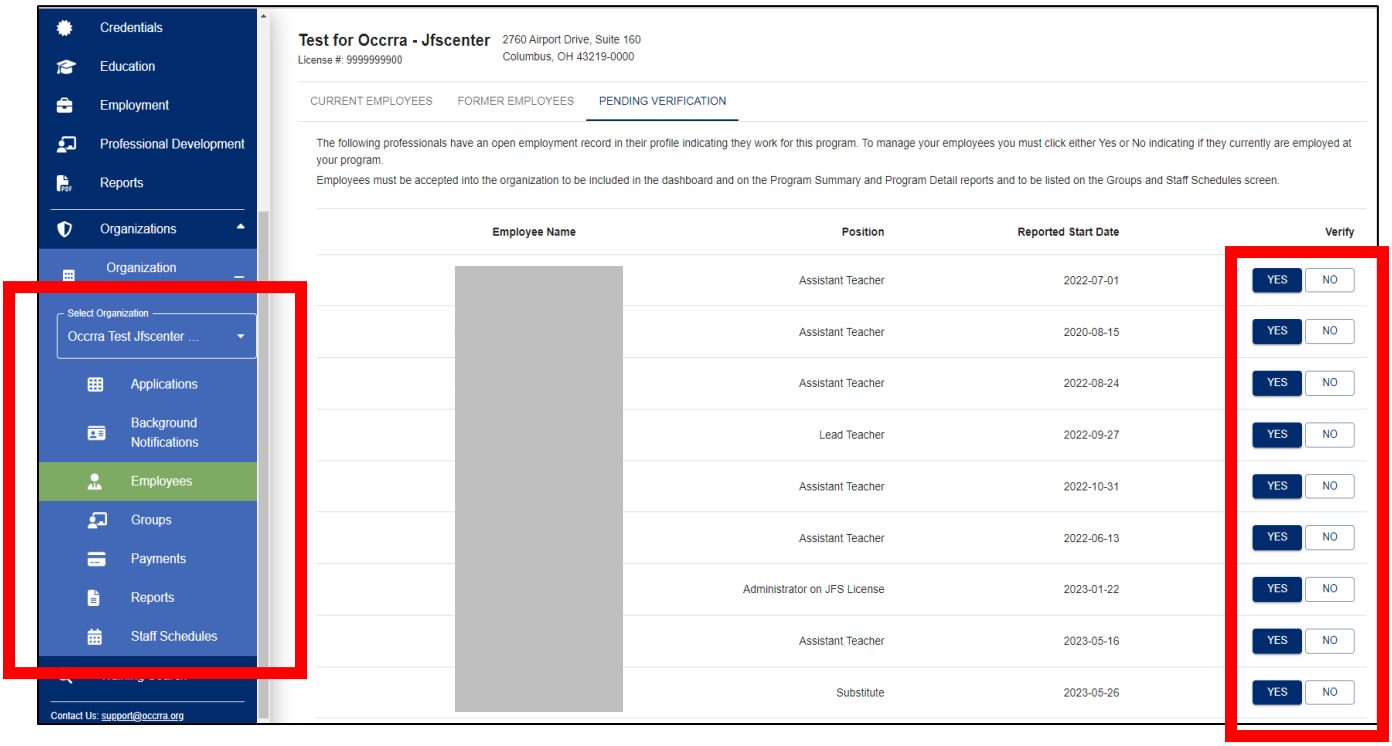
© 2021 OCCRRA. All rights reserved.

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.



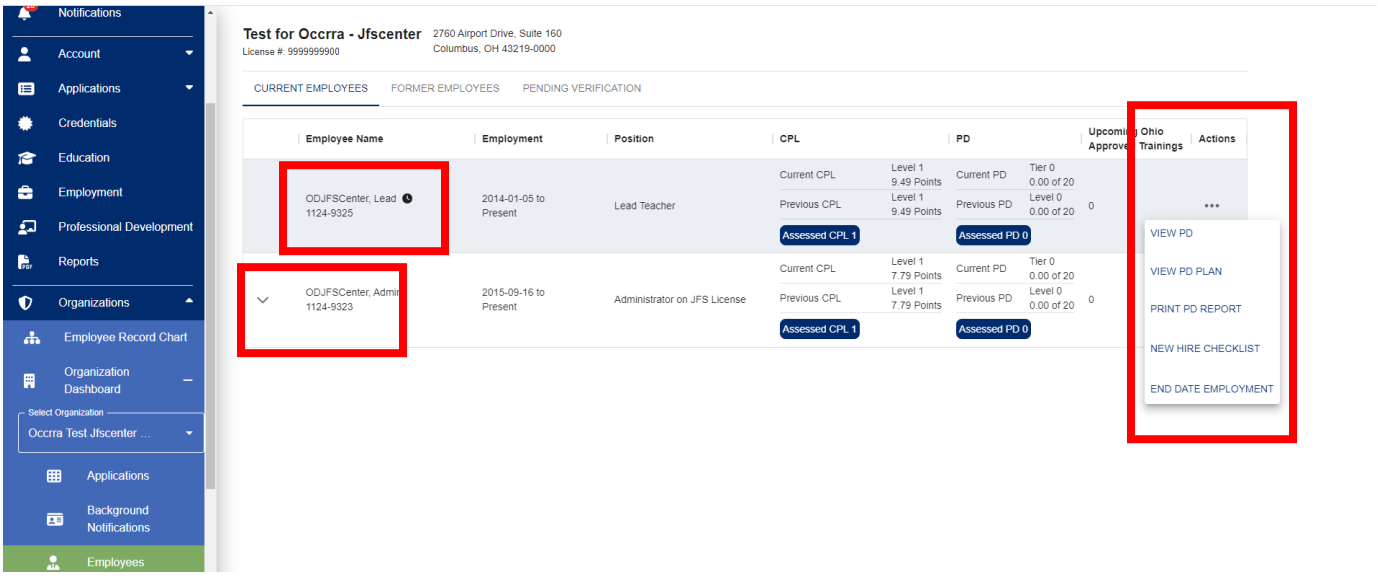
© 2021 OCCRRA. All rights reserved.

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.

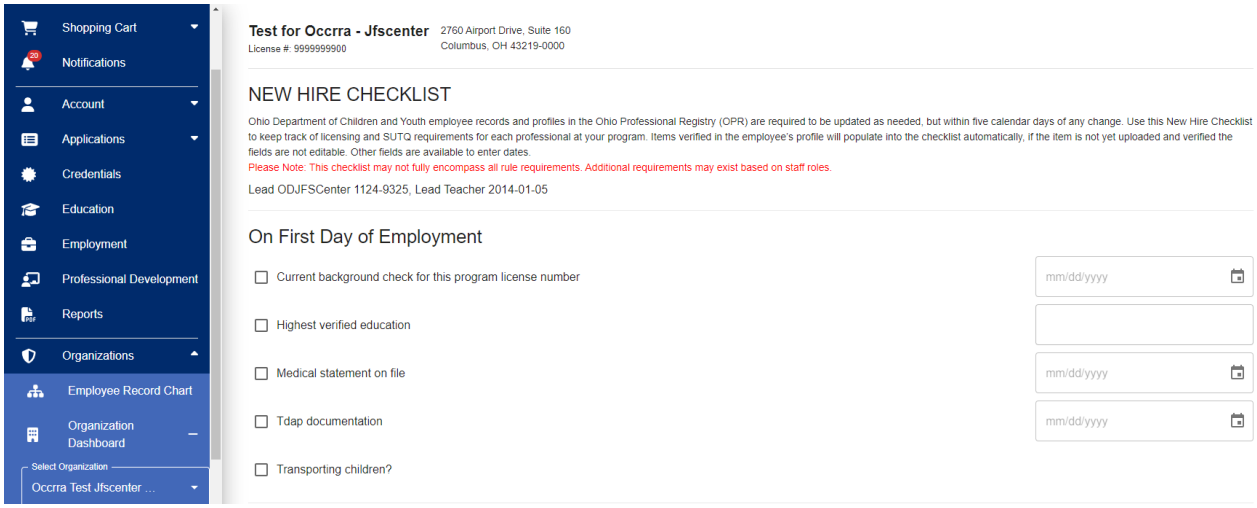
The clock indicator next to the name of the professional shows they have a staff scheduled entered.

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

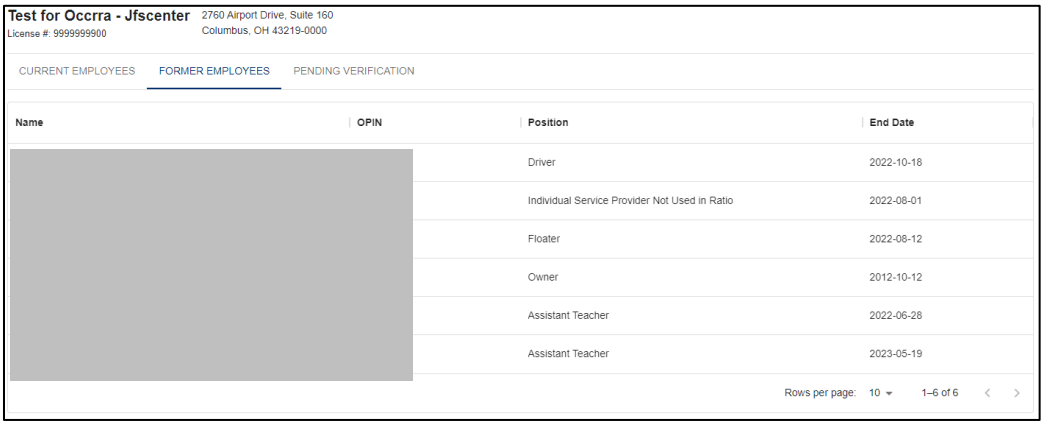


Under the Actions Column, you will see New Hire Checklist. This checklist will be a smart checklist that will pull in staff requirements, such as trainings and health and safety training expiration dates, directly from the professional's OPR profile. It will also allow the administrator to enter medical completion dates and background check expiration dates for the administrator to view and monitor compliance.

© 2021 OCCRRA. All rights reserved.



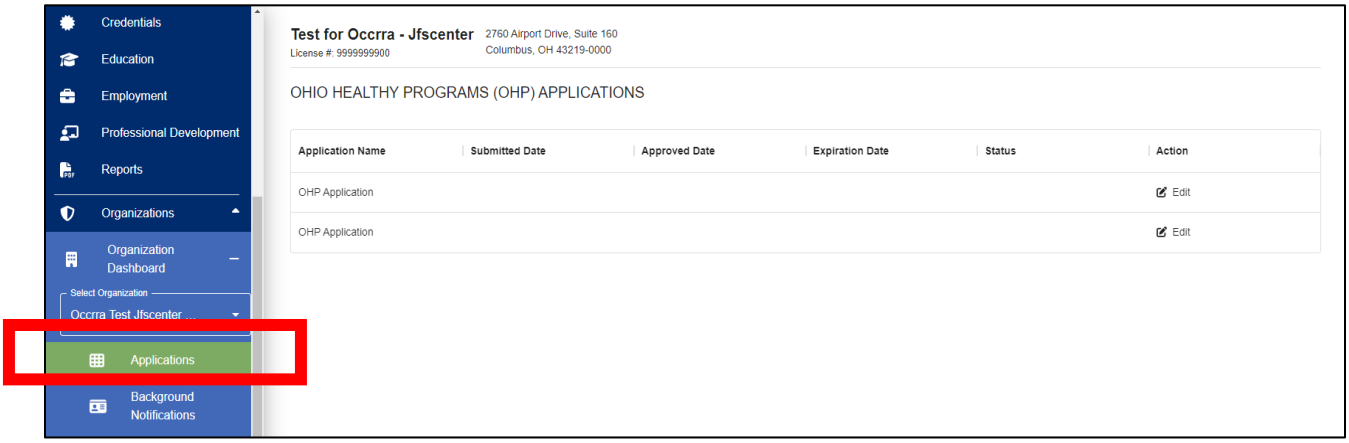
The Former Employees tab shows employees who have an end date for a record at that program.



© 2021 OCCRRA. All rights reserved.

Applications

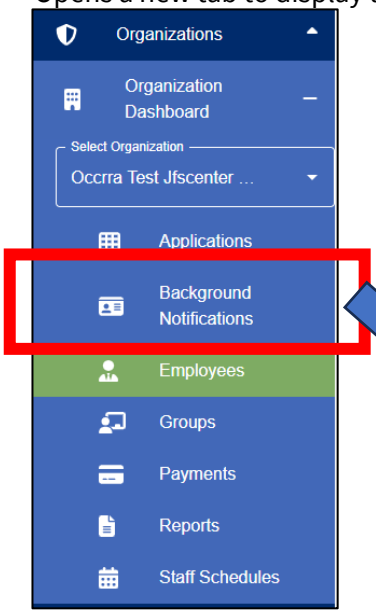
The Applications section is for programs interested in applying for the Ohio Healthy Programs, mentorship programs, or other available OCCRRA initiatives for programs.

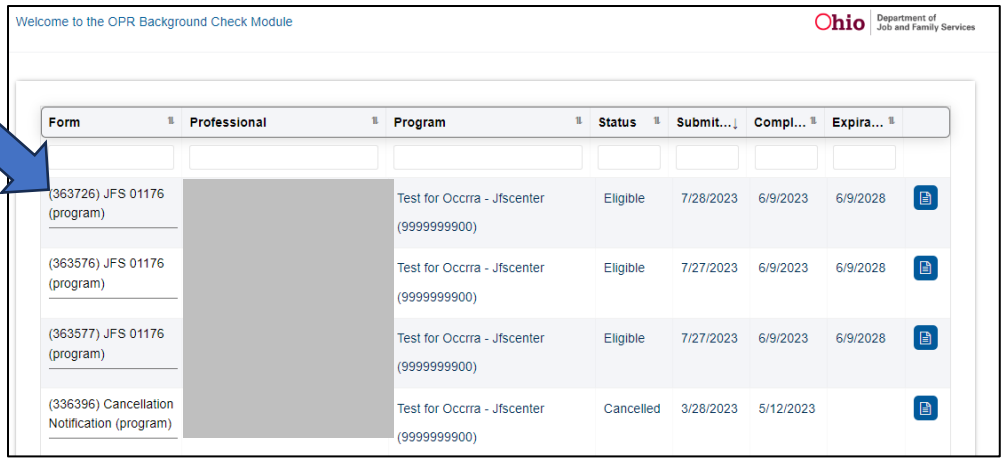


© 2021 OCCRRA. All rights reserved.

Background Notifications

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

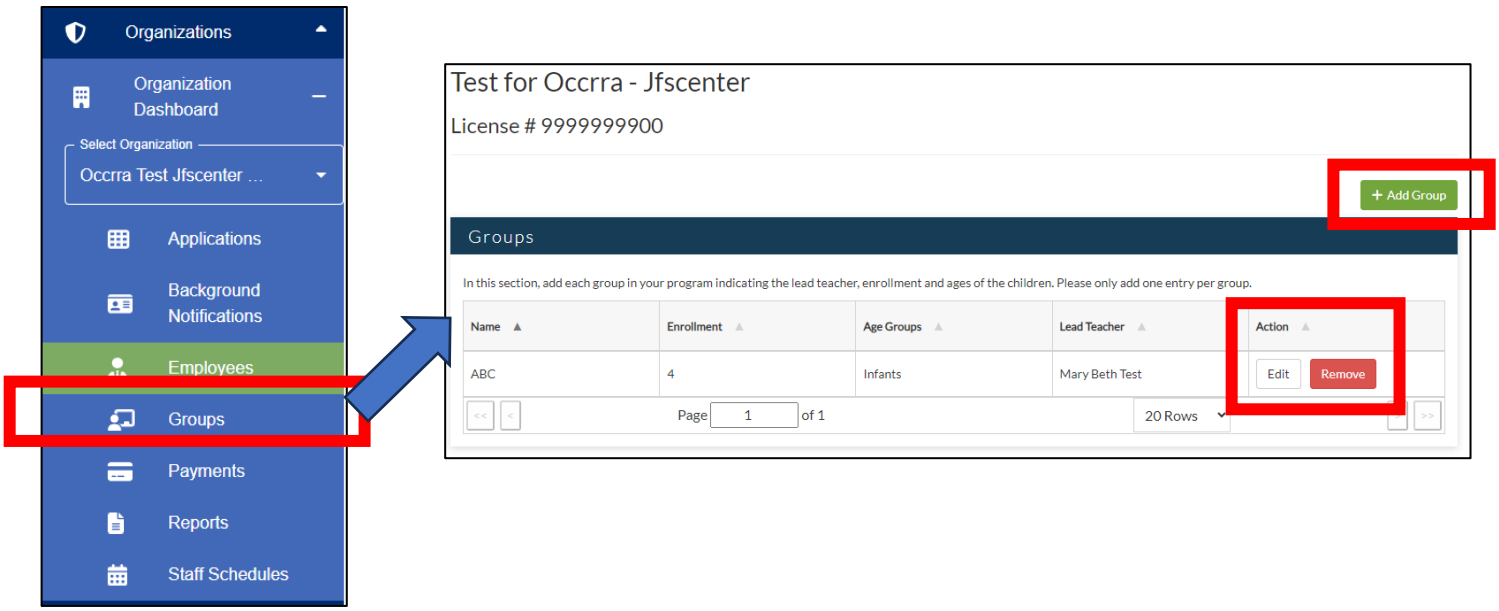




© 2021 OCCRRA. All rights reserved.

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.



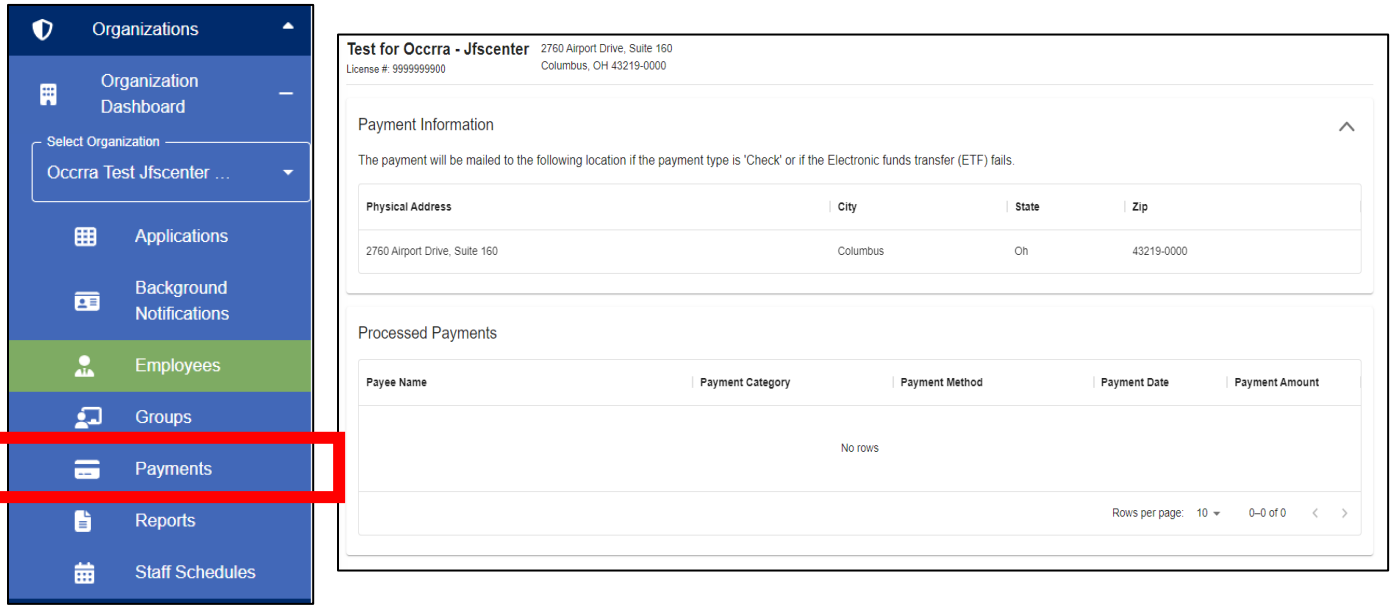
Click Add Group to begin. The program administrator will add the group and include the name of the group, the lead teacher's name, number of children enrolled in the group and their age group. Click +Add to save the group. Please note: The program administrator will need to complete the information on 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.

© 2021 OCCRRA. All rights reserved.

Payments

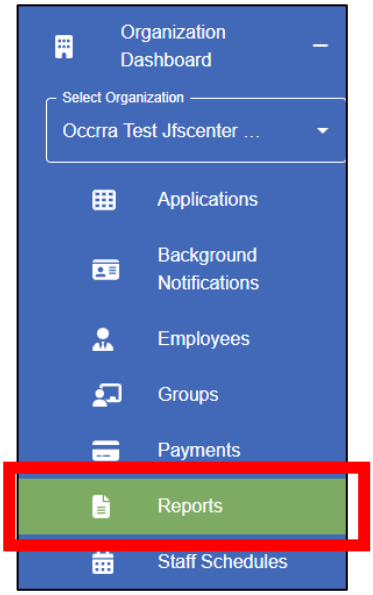
Displays any payments made to that program for various OCCRRA initiatives.



© 2021 OCCRRA. All rights reserved.

Reports Tab

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



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.

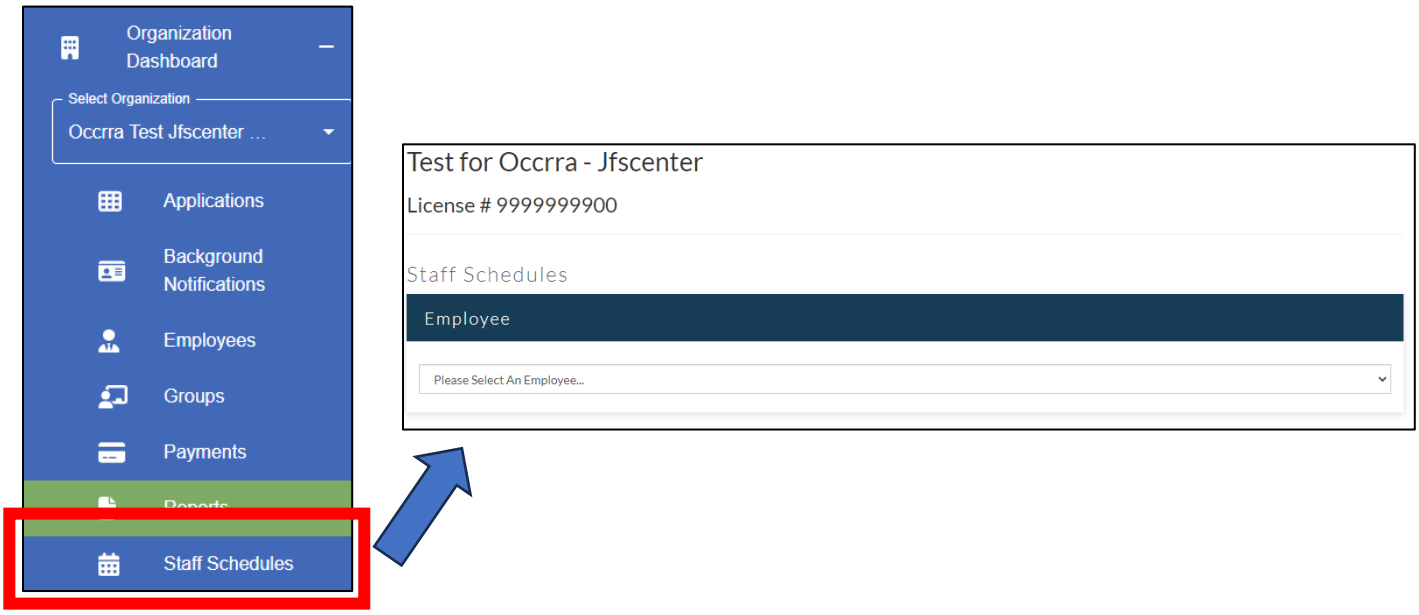
Program Detail Report (PDF): PD Certificate information for each professional at that program

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.

© 2021 OCCRRA. All rights reserved.

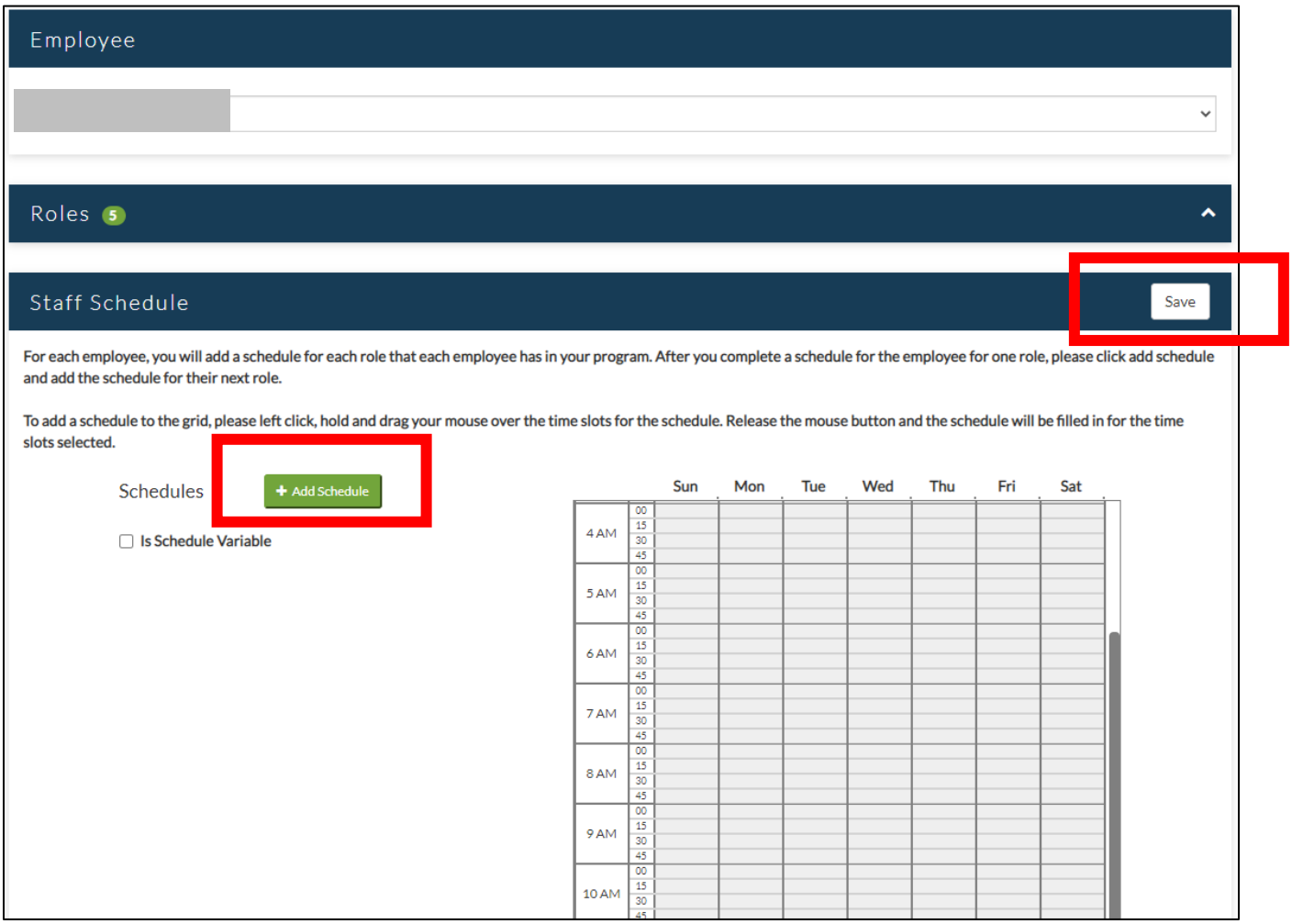
Staff Schedules

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.



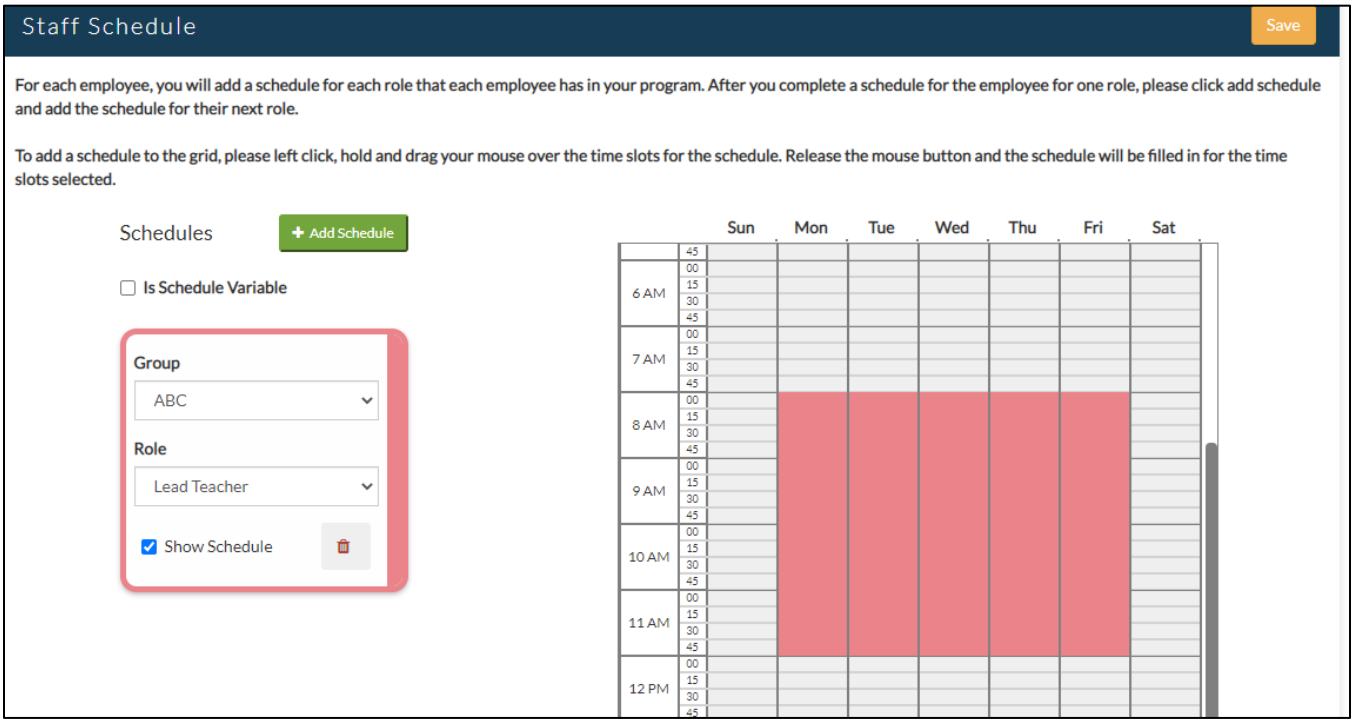
© 2021 OCCRRA. All rights reserved.

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.



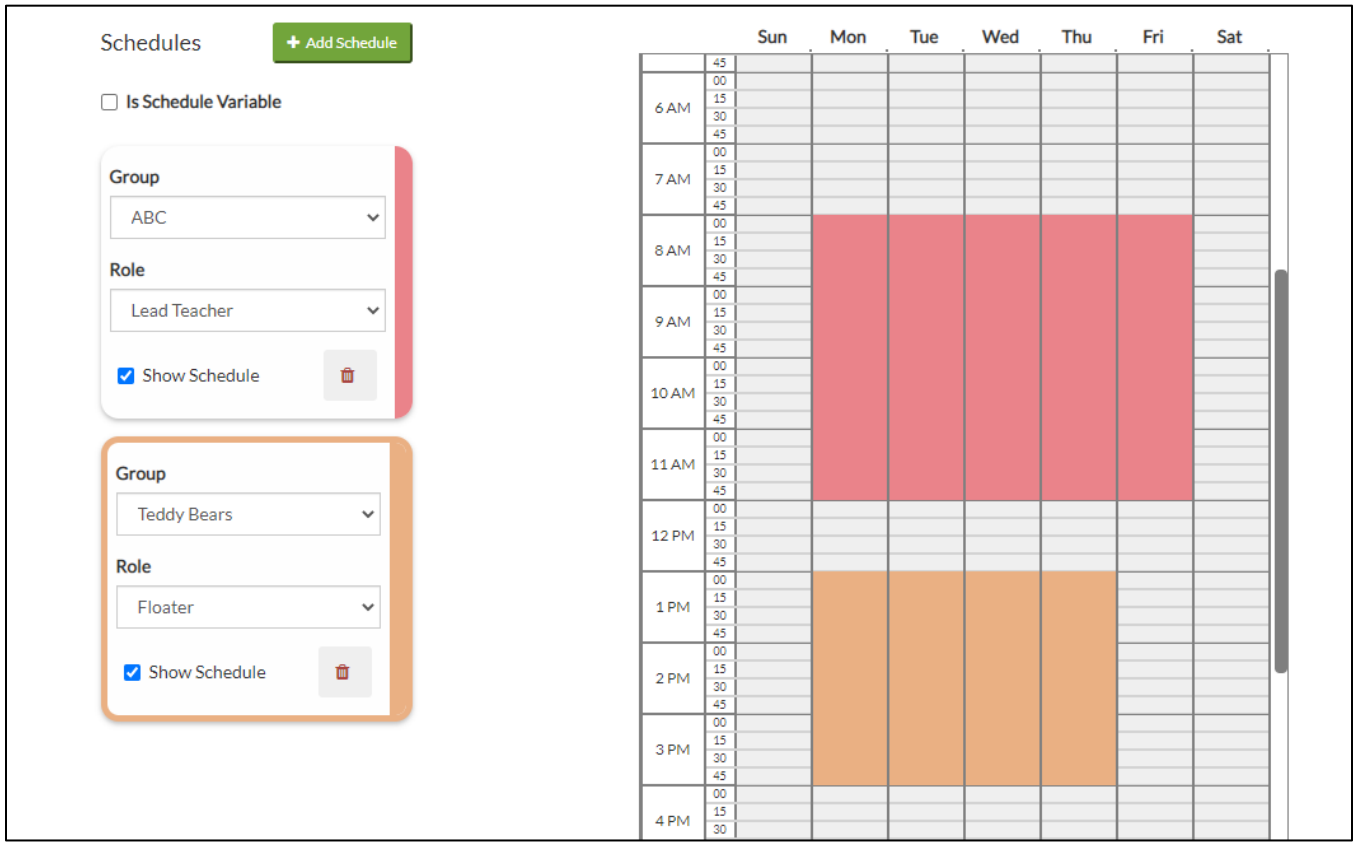
© 2021 OCCRRA. All rights reserved.

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.



© 2021 OCCRRA. All rights reserved.

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.



For more information, please view our website. If you have additional questions, contact us at support@occrra.org.

© 2021 OCCRRA. All rights reserved.