Please note the following instructions apply ONLY to Account Administrators/Authorizers.

STEPS

1. To get to the Administration screen click on "**Administration**" on the left-hand side.

   a. A drop down list will display the following five options **"Administration Home," Manage My Organization,", "Search for My Centers/Communities", "Manage my Users," "Manage Multiple Users/Roles," and "Manage Divisions"**

2. "**Administration Home**" page displays the remaining four options the administrator can edit.

   a. ***Please click Manage Organization if this is your <u>initial</u> organization setup.***

   b. If this is not your initial set up, you have the option to proceed to a particular admin screen from the "**Administration Home**" page or directly from the dropdown list.

3. "**Manage My Organization**" will allow Account Administrators to create divisions, add or remove centers and manage Focus F-Tag & K-Tag selections to be included in their organizations' users CASPER Citation Reports.

   a. ***To create your first division***:

      i. **Step 1**: Click on the drop down list, and highlight, "Create New Division for: [ORG]"

      ii. **Step 2:** Once that has been selected, you will type in the, **"DIVISION NAME"** box, the name of your new division.

      iii. **Step 4:** The box below titled, **"Parent Division"**, is where you will select the parent division. Please select your organization name.

         1. **What is a Parent Division?** A parent division is your organization OR a division that has been created and you wish to create a sub-level for.

      iv. **Step 3:** Click [Create Division]

Example Below:

Choose Division

CREATE NEW DIVISION FOR: AHCA Administrative Organization   ▼   💾 Create Division

Division Name: LTC Trend Tracker Group

Parent Division: AHCA Administrative Organization   ▼

b. *To Create a Sub Division*:

    i. Step 1: Choose the name of the division you wish to create another level for.

Choose Division

CREATE NEW DIVISION FOR: ▲   💾 Create Division

-- Select a Division from the List --

CREATE NEW DIVISION FOR:

    ii. Step 2: In the **"DIVISION NAME"** box, type the name of the new division

    iii. Step 3: In the **"Parent Division"** box, choose the name of the division you are creating another level under.

    iv. Step 4: Click 💾 Create Division

Example Below:

Choose Division

CREATE NEW DIVISION FOR: AHCA Administrative Organization   ▼   💾 Create Division

Division Name: LTC Trend Tracker Group 2

Parent Division: LTC Trend Tracker Group   ▼

Note: For more information, please reference the external help doc titled, ***"Navigating the Manage Divisions Screen".***

c. **"Organization Centers/Communities"** allows you to manage the list of centers that are "attached to" your organization. _In this section you will also be able to perform the function of detaching centers from your organization._ To access the options in this section, click the [MANAGE] button.

    i. "**Centers Attached To your Organization**" will display the center name as a link. Any user attached to this center will be shown once the link is clicked.

        Note: Center names displayed in LTC Trend Tracker are drawn from the CASPER database and reflect the legal entity name that is registered with CMS. This cannot be changed by the user or Account Administrator. Any desired change needs to be made by modifying with CMS directly.

    ii. To remove a center from the organization's list, click on "**Detach**"

        Note: This removes the center from your organization entirely – they will no longer appear on your list of centers unless re-attached.

    iii. "**Centers Not Attached to Your Organization**," allows you to search for and select centers that are available to be attached to your organization. You will be able to search for any center that is within the CMS CASPER database that is not currently "attached" to any other organization.

Note: For a center to be attached to your organization, AHCA must approve the attachment by verifying ownership and AHCA membership status. AHCA may request the CMS 855-A for any request to attach a center to an organization.

1. To add a center:

    a. Type any part of the name of the center, or Medicare Provider Number within the search box and click "**Search**." The search function will pull up all available centers that contain your search word or phrase in their name.

  Note: center names in this system are pulled from the CMS CASPER database using the legal entity name. These names may differ somewhat from the name commonly used for/by the center. If your search does not return a center you are expecting, try making your search less specific.

    b. When you see the center you are looking for displayed in the list, click **"Attach"** in the same line as that center name.

iv. The center name should now appear in the "Centers Pending Attachment to your Organization" section. Once AHCA has approved the attachment by verifying membership and ownership. The center will move to the "Centers Attached to Your Organization" list.

    d. "**My Org Focus F-Tags**" and "**My Org Focus K-Tags**" will display tags (on the "**Manage My Organization**") along with brief descriptions, that are available to add to reports. Use this function to select tags that the organization is focusing on. All of the organization's users will see data for these tags when running CASPER citation reports.

        i. Selected tags will display a checkmark. Check or uncheck tags as desired. After selection or deselection is complete, click "**Save My Org Focus K-Tags**" / "**Save My Org Focus F-Tags**"

ii. After saving, a message will display if the save was successful or encountered an error.

4. **"Search for My Centers/Communities"** allows Account Administrators to search for centers in the entire LTC Trend Tracker database by Medicare Provider Number or by center name.

   a. Enter search information in either **"NCAL ID or Medicare Provider Number"** or "**Center Name**" box and click **Q SEARCH CENTER**

   Note: please remember that center names in this system are pulled from the CMS CASPER database using the legal entity name. These names may differ somewhat from the name commonly used for/by the center. If your search does not return a center you are expecting, try making your search less specific.

   b. Results will display the provider number, center name and a **🔧 MANAGE** button.

   c. Click "**Manage**" to view users attached to the center and edit their user roles. (See assigning user roles below for more information.)

5. "**Manage my Users**" allows Account Administrators to search for a user by name or email (**recommended**!), to add a new user, and to modify roles and permissions for each user attached to the organization.

   a. Enter search information in either "**User Name**" or "**User Email Address**" box.

   b. Results will display name, email address, and **🔧 MANAGE** button.

      i. Note: A maximum of 50 results will be displayed

   c. Click "**Manage**" to view user roles and centers attached to user.

      i. The "**Manage**" button next to the user profile in the "**Manage Centers**" section will also bring you to this page.

   d. "**Assign User Role**" Each user **must** be assigned **one** primary role. There are three types of user roles that an organization may choose for its individual users:

      i. "Provider Org Administrator": This role assigns the user to the whole organization. This person manages centers and users and assigns permissions to other users for the whole organization. Also known as the Account Administrator.

      ii. "Provider Org Org Unrestricted User": this role assigns the user to the whole organization.

      iii. "Provider Org Center Unrestricted User": this role assigns the user to one or more individual centers.

   e. The "**(Optional) Additional Access**" section lists optional permissions that can be selected or de-selected for each user. These additional options are not listed as selections for any user in the Account Administrator role because all permissions are automatically active for users in that role.

   *Note: By default, all user types have access to all reports **except** the Turnover, RUGs and Cost Reports. To allow permission to view these reports, the Account Administrator must turn these additional permissions on. To do so, the Account Administrator must go to the "Manage my Users" tab and search for the user by name or by the user's email address. When the user is found, click "Manage" to make changes to permissions.*
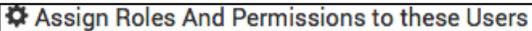
To assign optional permissions, select each of those desired by marking the check box. When all permissions for the user are selected, click "**Save.**" These can be modified by the Account Administrator at any time by returning to this page **(see Chart on page 6)**.
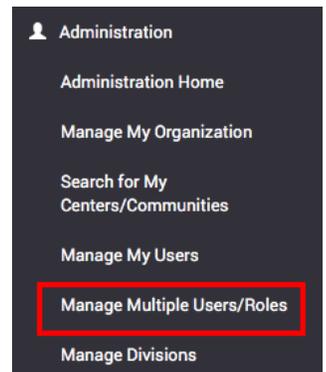
  f. "**Select Centers that Users can access**" section allows you to edit the selection of centers within a user's existing profile.

    i. The "Status" indicator Next to the Center Name will display the access status of that specific center to a user. Click "Detach" to remove access to a center's information from a given user.

    ii. At the bottom of the list of centers, the [ASSIGN ALL CENTERS TO USER] button will allow for the Account Administrator to assign all centers at once to a user with one click.

6. "**Manage Multiple Users/Roles**": If you would like to edit user roles, assign upload permissions, turn on access to specific reports, or add additional facilities to a multiple users, please reference the following steps:

  a. Under the Administration Tab, click "Manage Multiple Users/Roles".

  b. Select a Primary Role.

  c. In the [⚙ Permissions] box, select the permissions that you would like to add to your users.

  d. [⚙ Assign Roles And Permissions to these Users] In this box, select each individual user that you would like to assign the previously selected user role and permissions too.

  e. If you would like to manage the profile a specific user or remove a user from your organization, click "Manage" next to the users name.

  f. If you would like to see a snapshot of which centers or communities the user is attached to, click the ✚ sign next to the number ratio.

☐	ProviderOrg LTCTTAASNF	snf_provorgltcttaa	mkhanna@synaptitudeconsulting.com	✚ 6/6 🔧 MANAGE

  g. Once all selections have been made, click [💾 SAVE]

Administration
- Administration Home
- Manage My Organization
- Search for My Centers/Communities
- Manage My Users
- Manage Multiple Users/Roles
- Manage Divisions

User Roles	Definition
Provider Org Administrator	Sets the user privileges and facilities for the organization, has access to information for the entire organization
Provider Org Org Unrestricted User	Has access to information for the entire organization (all centers)
Provider Org Center Unrestricted User	Has access to information for one or more individual center(s)
Default Functions/Permissions By User Role	**Definition**
Provider Org Account Administrator:	
Create/edit centers and profiles	The ability to create/edit facility profiles
Create/edit center groups (sub orgs)	The ability to create/edit sub organizations
Create/edit users & their permissions	The ability to create/edit user permissions
Create/Edit org focus tags (F & K tags)	The ability to edit and change the organization-wide focus tags visible on CASPER Citation reports for the organization and all associated centers
Provider Org or Center Unrestricted User:	
Edit Own Dashboard, Report and Peer Group selections, run all reports except Turnover, RUGs, and Cost Reports	The ability to select report & dashboard options and peer groups, run reports (except Turnover and RUGs) for all centers assigned (Provider Org Center Unrestricted User) or for entire organization (Provider Org Org Unrestricted User)
Additional (Optional) Permissions (Assigned to Users by Account Administrator)	**Definition**
Edit Center and Profile Information	Permission to modify, delete, and add facilities to organization (subject to AHCA customer service approval), edit facility profiles (name, contact info).
Upload RUGs data	Permission to upload, edit & download RUG data (does **not** include permission to view RUG reports or RUGs metrics on dashboard)
Edit Turnover data	Permission to upload, edit & download Turnover data
View Cost Report	Permission to see the Medicare cost report data
View RUGs Report	Permission to view & download RUGs report, upload/edit RUGs data, and view RUGs dashboard metrics
View Turnover Report	Permission to view & download Turnover report, upload/edit turnover data, and view Turnover dashboard metrics
Allowed to list and report on SNF centers	View SNF related reports for associated facilities
Allowed to list and report on AL centers	View AL related reports for associated facilities
Allowed to Upload NCAL Measures Data	Can upload AL Quality Measures data
Allowed to Edit Organization Building Goals	Create and Edit Organization Building Goals