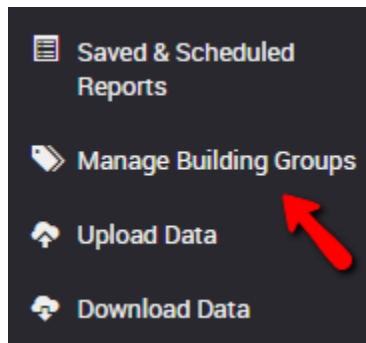


## STEPS

“**Manage Building Groups**” allows all user types to create user specific building groups, within their organization for example regions, divisions or states. The user will have access to these groups when running reports, saving and scheduling reports, and modifying their dashboards. The groups can contain any combination of buildings, divisions, and sub-divisions at the user’s discretion. (Please note: that these groups can only be seen by your username)

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

1. **Step 1:** Click on “**Manage Building Groups**”.



2. **Step 2:** In the, **GROUP NAME**” box, type the name of your new group.

3. **Step 3:** Select the Divisions, Assisted Living Communities, or Skilled Nursing Centers you would like in your group.

- i. NOTE: Your group can contain any combination of buildings, divisions, and sub-divisions.


4. **Step 3:** Click 

**Example Below:**

The screenshot shows a form with two main sections. The first section, 'Select Building Group', has a dropdown menu currently set to '-- Create New Group --' and a green 'Create Group' button. The second section, 'Choose Divisions', contains a list of checkboxes: 'AHCA Administrative Organization' (unchecked), 'Gold Recipients' (unchecked), 'LTC Trend Tracker Group' (checked), 'No Sub-Org Assigned for AHCA Administrative Organization' (unchecked), and 'recipients' (checked).

b. **To Edit and Delete Groups:**

1. **Step 1:** In the first drop down, list choose the group you wish to edit or delete.

i. To delete the group click 

2. **Step 2:** If editing, add or remove the necessary Divisions, Skilled Nursing Centers and/or Assisted Living Communities from the group.

3. **Step 3:** Click 

c. **To Run a Report & Save and Schedule Reports with a Division and/or Building Groups.**

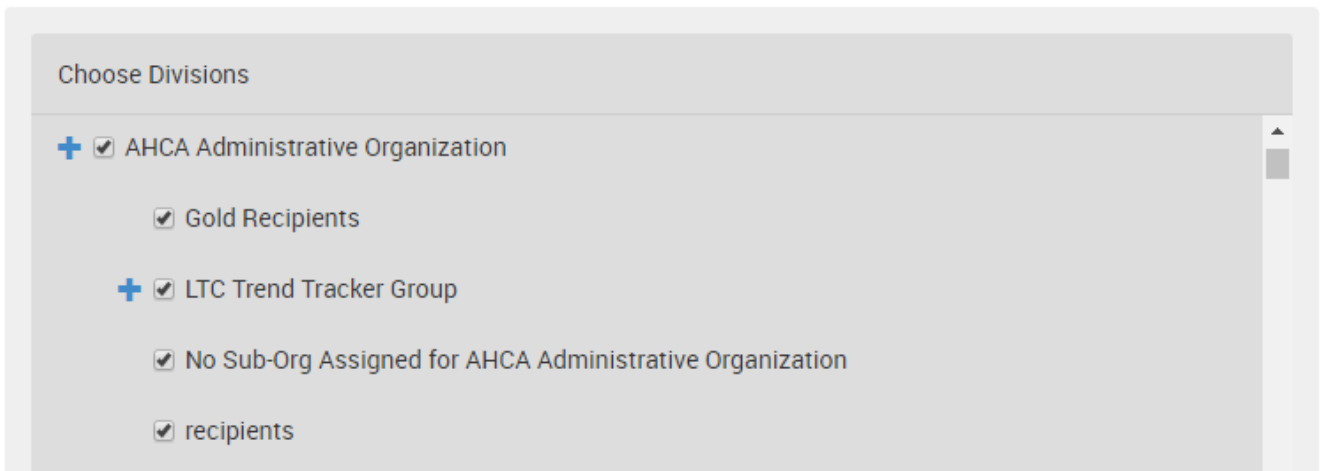
**NOTE:** You do not have to choose a division or a building group to run a report. A user can scroll down to the, “Choose Skilled Nursing Centers/Choose Assisted Living Communities” section, and choose a building(s).


1. **Step 1:** Click  Limit my buildings for which I want to see results

2. **Step 2:** Choose the Division you wish to run a report for.

i. When clicking your organization name, all of the divisions, and sub divisions will be checked along with it.

Limit my buildings for which I want to see results



ii. The  sign indicates there are sub-divisions underneath these divisions.

3. **Step 3:** Choose the Building Group you wish to run a report for

i. **You do not have to choose a division to run a report for a building group.** A user can scroll down to the, “**Choose Building Groups**” section, and choose a group alone.

**4.Step 4:** Verify that the divisions and/or building groups checked are what you wish to run a report for. In the sections below titled, “**Choose Skilled Nursing Centers/Choose Assisted Living Communities**” you will see which buildings are included in your divisions and/or building groups’ selection by highlighting and check marks. To remove a building from the report criteria, click on the check mark associated with that building.