Navigating the Manage Divisions Screen

This document outlines the Manage Divisions Screen for LTC Trend Tracker Account Administrators. The divisions’ functionality has taken the place of the original feature “sub-organizations”.

What are divisions? Divisions are put in place by LTC Trend Tracker Account Administrators to group Skilled Nursing Centers and/or Assisted Living Communities in order to run reports, modify your dashboard, and save & schedule reports in a dynamic way.

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 (black bar)
   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”
   b. Click on “Manage Divisions”

      Note: This can also be accessed from the “Manage Organization” page.

2. “Manage Divisions” will allow Account Administrators to create many divisions and sub-divisions, within their organization for example regions, divisions or states. This will allow for a building to be in more than one division. All users within your organization will be able to access the divisions and sub-divisions when running reports, saving and scheduling reports, and modifying their dashboards.
   a. To create your first division:
      1. Step 1: Click on the drop down list, and highlight, “Create New Division for: [ORG]”
      2. Step 2: Once that has been selected, you will type in the, “DIVISION NAME” box, the name of your new division.
      3. Step 4: The box below titled, “Parent Division”, is where you will select the parent division. Please select your organization name.
         i. 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.
      4. Step 3: Click Create Division

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Example Below:

b. To Create a Sub Division:

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

2. Step 2: In the “DIVISION NAME” box, type the name of the new division

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

4. Step 4: Click

Example Below:
c. To Edit and Delete Divisions/Sub Divisions:

1. **Step 1:** In the first drop down, list choose the Division you wish to edit or delete.
   
i. To delete the division click [Delete Division]

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

3. **Step 3:** Click [Save Division]

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d. 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.

a. 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.

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’
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selection by highlighting and check marks. To remove a building from the report criteria, click on the check mark associated with that building.