Community Software Group

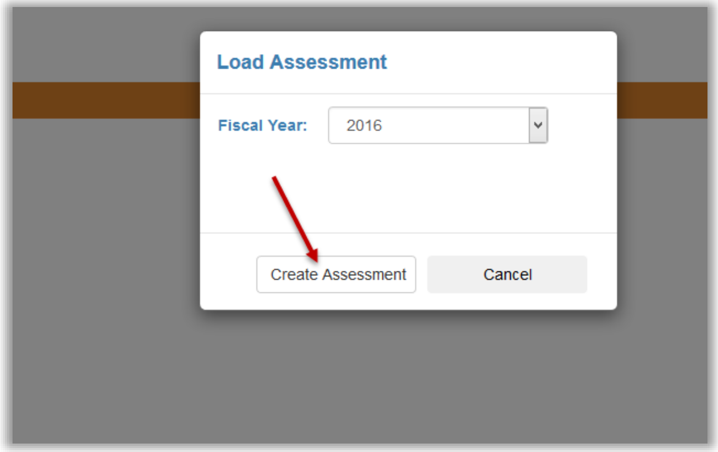
Organizational Standards

Submitter User Guide

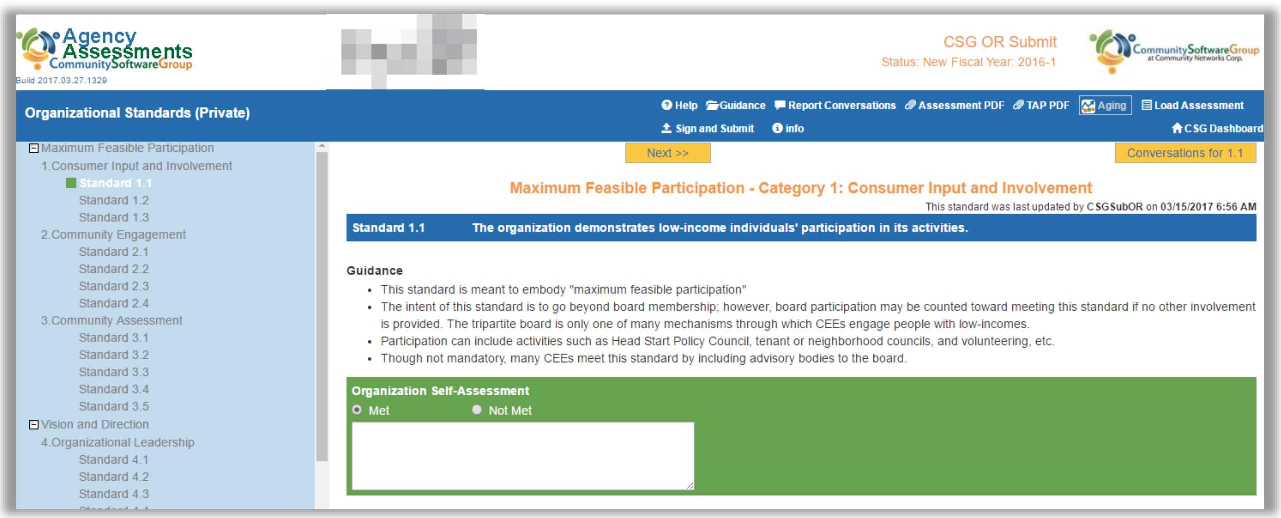
Contents

Creating an Assessment

Click the Create Assessment button, if the assessment has not yet been created (if the assessment has already been created, the button will display “Load Assessment”).

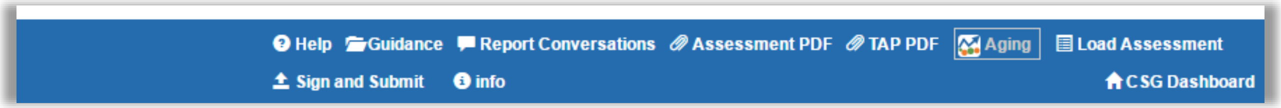


The Organizational Standard assessment screen will open.



Assessment Header

The assessment header provides several buttons to link to additional tools and features. They are outlined below.



- Help – loads a page with links to user guides, FAQ's and tutorial videos
- Guidance – loads a pop-up with links to guidance documents/websites provided by the state agency with additional information to assist with filling out the assessment
- Report Conversations – a link to a conversation tool to facilitate direct communication with the state office
- Assessment PDF – generates a pdf of the entire assessment for printing or saving to a computer
- TAP PDF – generates a pdf document of just the Technical Assistance Plan (TAP) items for printing or saving to a computer
- Load assessment – allows the user to load a different revision of the assessment for reference
- Sign and submit – loads a pop up to sign and submit the assessment for review
- info – Information on the assessment including status, version and when and by whom the assessment was created
- back to eGov – navigate back to main eGov menu

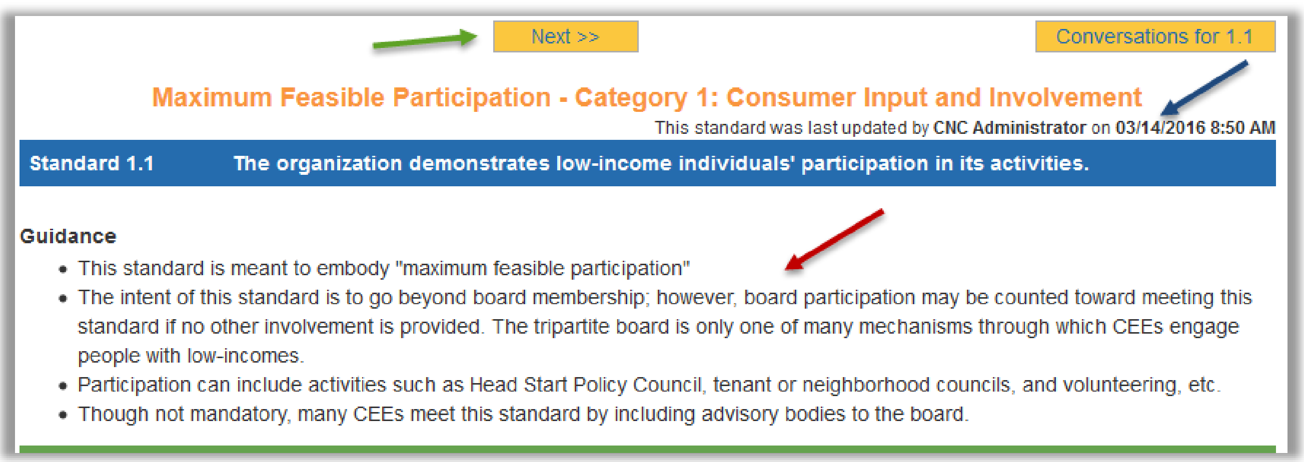
There is no save button. The assessment saves automatically each time a standard link is selected, when any button in the header is clicked, when the Previous/Next buttons are selected or the CSG Dashboard link is selected.

Standards

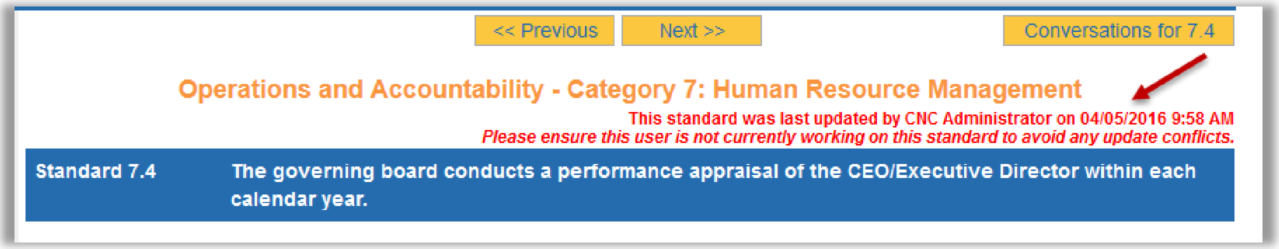
The section and category are displayed at the top of the screen in orange. In the blue bar below that, the standard number and title are displayed. The guidance for each standard is a bulleted list under the standard title bar (red arrow).

A date and time stamp is shown to inform users of the last time, and by whom, the assessment was updated.

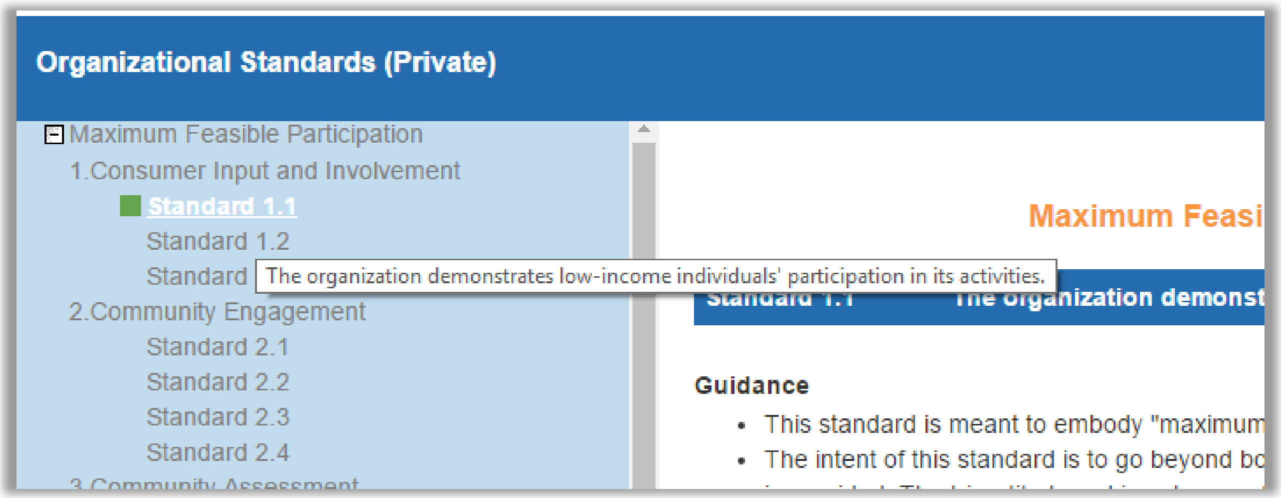
Next and Previous buttons are at the top of the page to ease navigation through the standards (green arrow).



Multiple users can access an assessment at the same time, so the date/time stamp will be marked in red if the assessment was updated by another user less than 5 minutes prior (see red arrow).

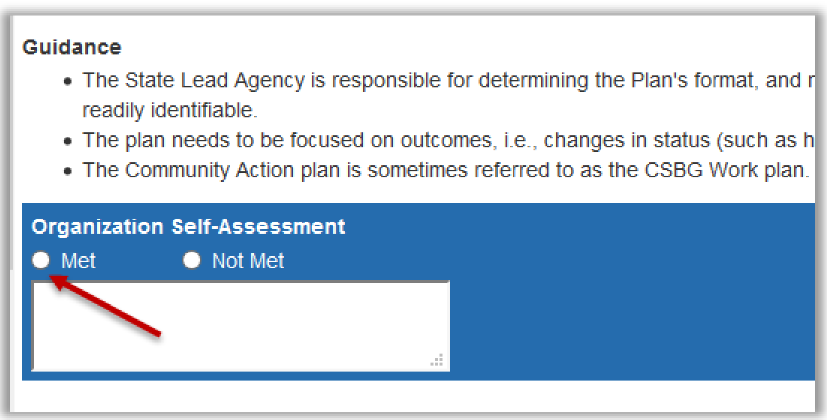


The list of standards is in a scrollable frame on the left side. When the cursor is moved over a specific standard, a tool tip appears with the full description of that particular standard.

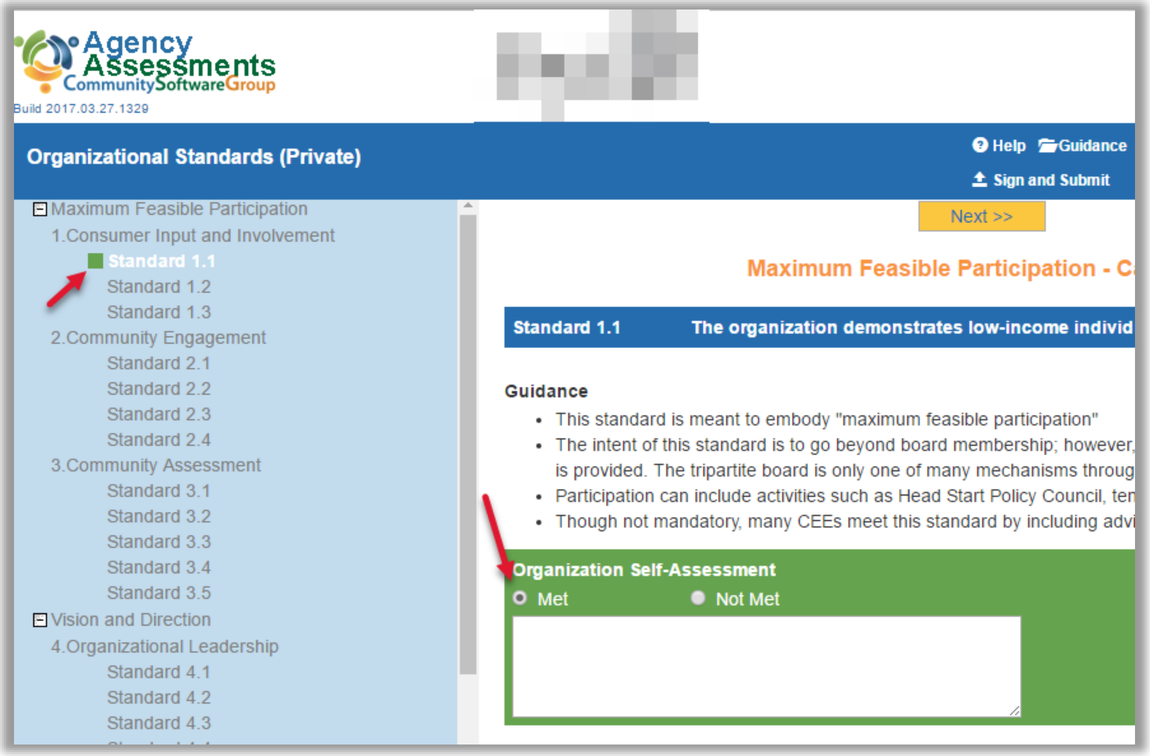


Setting Standards

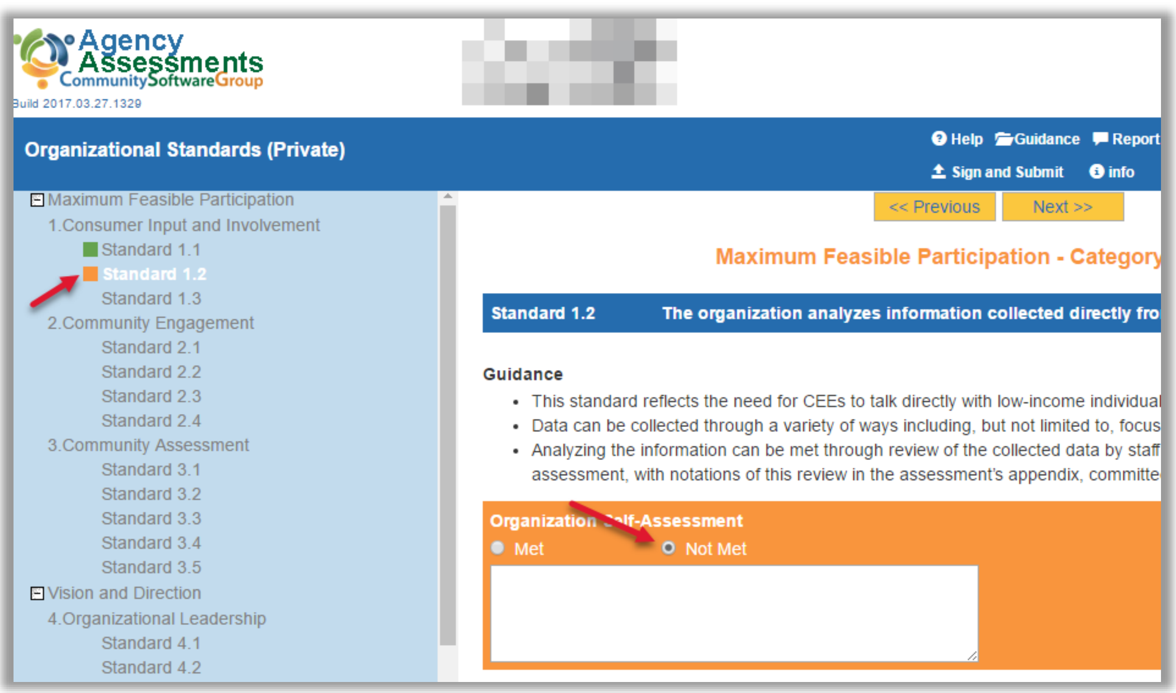
To set a standard as Met, select the radio button in the blue Organization Self-Assessment section (red arrow).



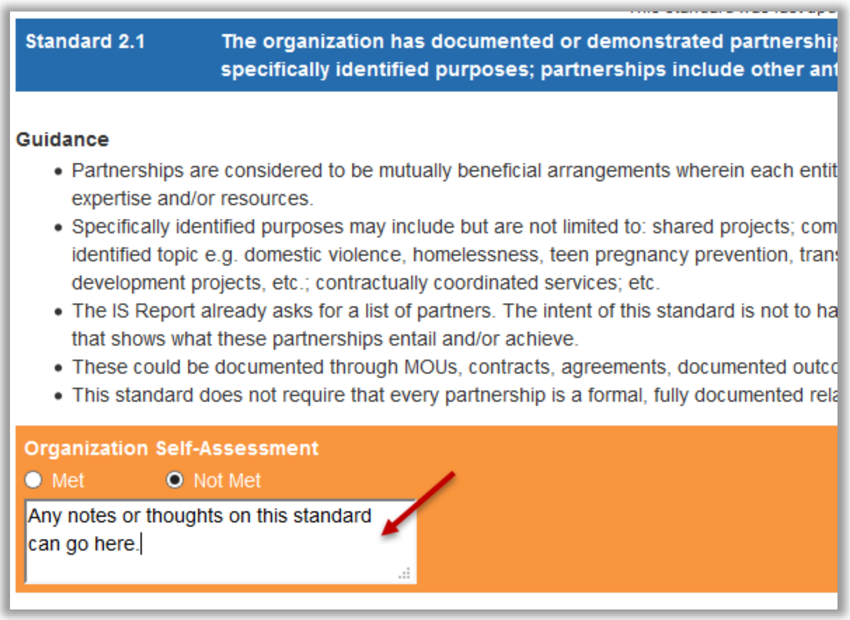
When a standard is set as "Met", the Organization Self-Assessment section will turn green and a small green indicator will appear next to the standard in the standard list (red arrows).



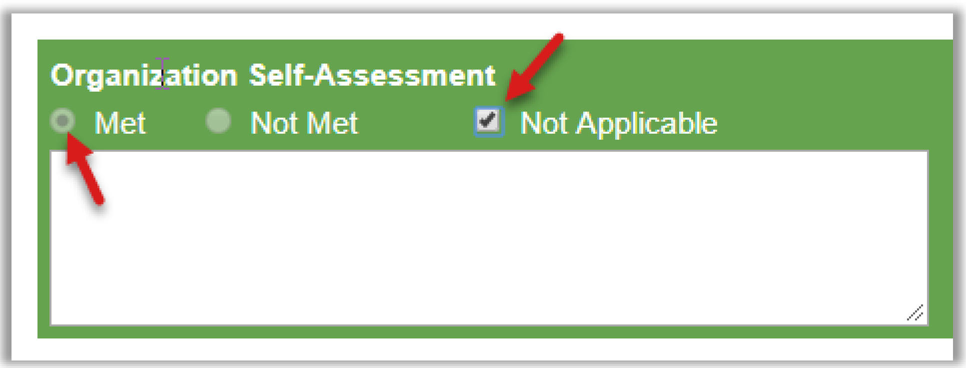
To set a standard to Not Met, select the radio button in the blue Organization Self-Assessment section. The self-assessment section will turn orange and a small orange indicator will appear next to the standard in the standard list (red arrows).



Notes on a particular self-assessment entry can be entered in the text box under the radio buttons. This text box is intended for brief notes.



In some situations, a standard may be determined to not be applicable for certain agencies. If this is the case and feature is available, a Not Applicable check box will be displayed as an option on all standards. Not applicable standards are treated as Met standards and therefore, the Met radio button will be automatically selected and not editable.



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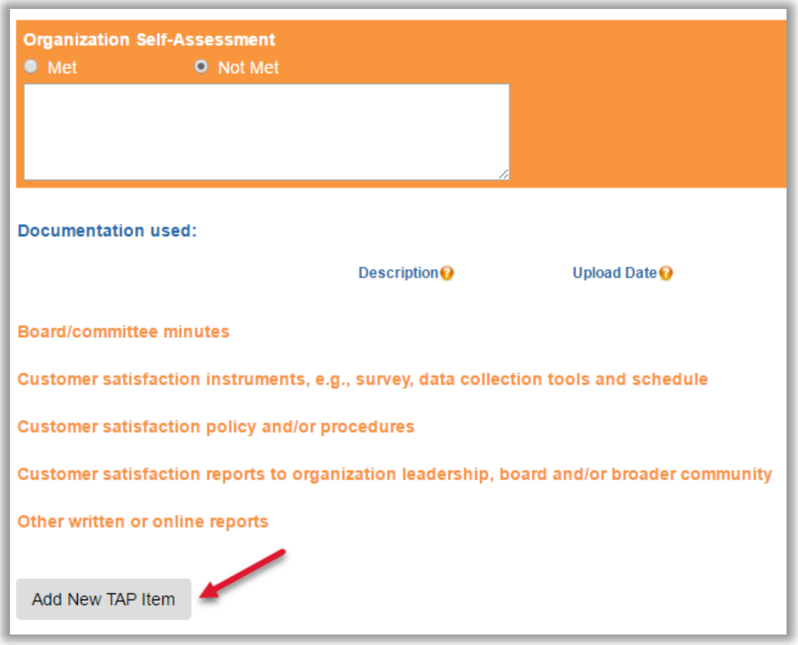
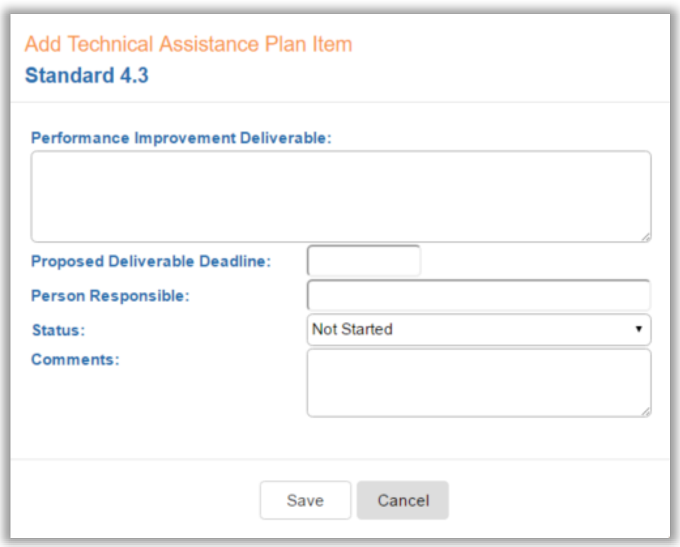
Adding a Technical Assistance Plan (TAP)

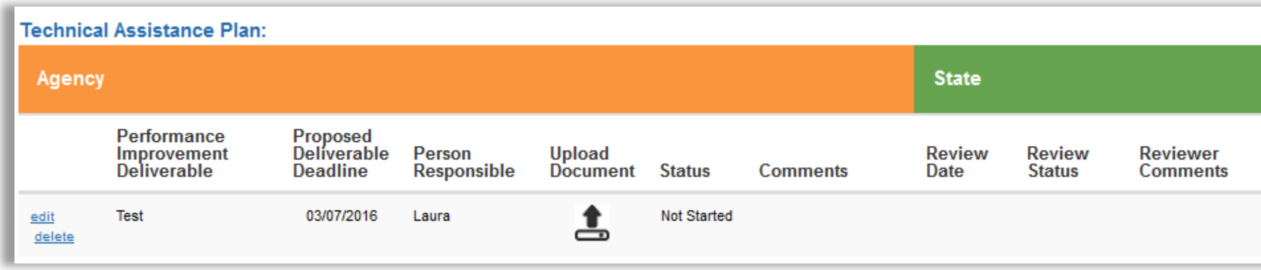
When a standard has been determined to be 'Not Met', an Add New TAP Item button will appear under the documentation section (red arrow). To add a TAP, click the 'Add New TAP item' button (blue arrow).



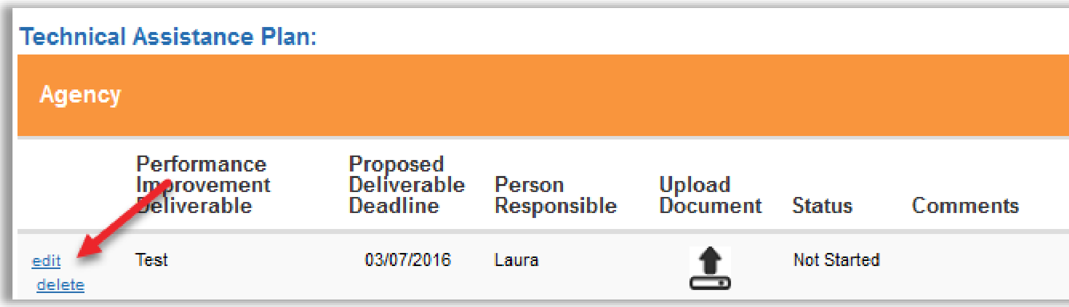
A pop-up window will load. Enter the Performance Improvement Deliverable, Proposed Deliverable Deadline and Person Responsible. The status defaults to Not Started. Enter any comments in the Comments box. To save the Technical Assistance Plan, click Save. To cancel, click Cancel.



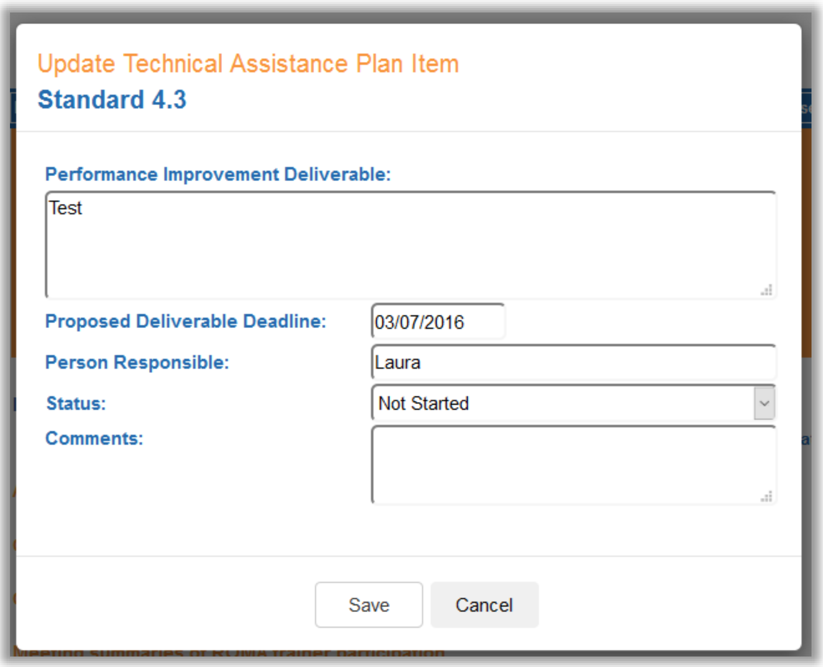
The details entered will appear in the Technical Assistance Plan table (see below). The user has the ability to edit or delete the TAP until the TAP item has been reviewed. To edit the TAP, click the edit link.



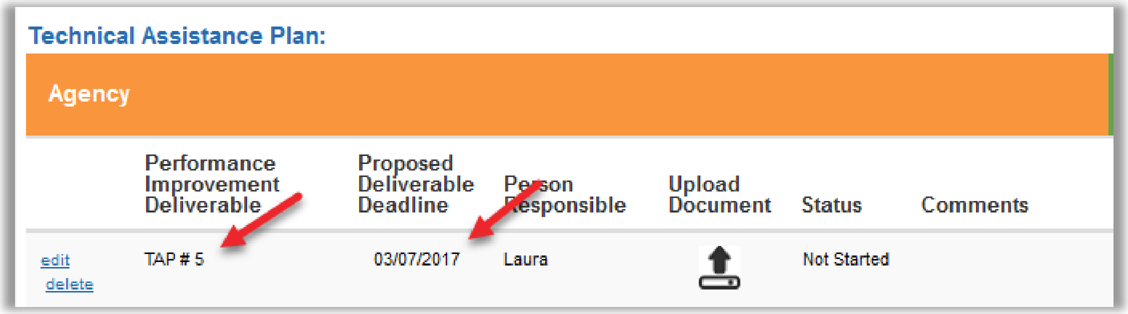
The user has the ability to edit or delete the TAP until the TAP item has been reviewed. To edit the TAP, click the edit link (see image below).



The TAP Item window will pop-up and modifications can be made to all parts of the TAP.



After all necessary edits have been made, click Save. The changes will appear in the Technical Assistance Plan table.

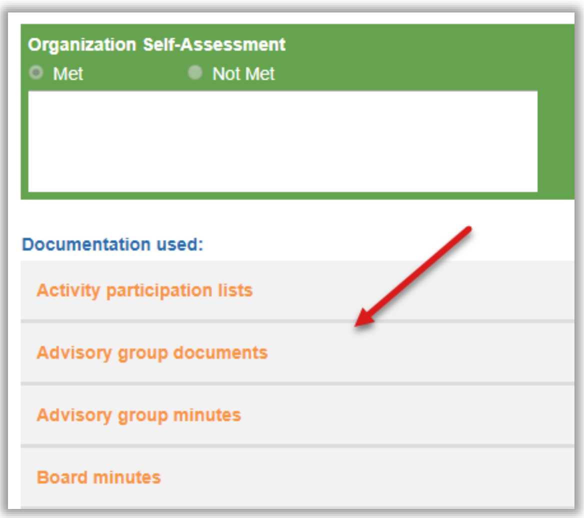


Documentation

Supporting documentation should be uploaded to support self-assessment selections.

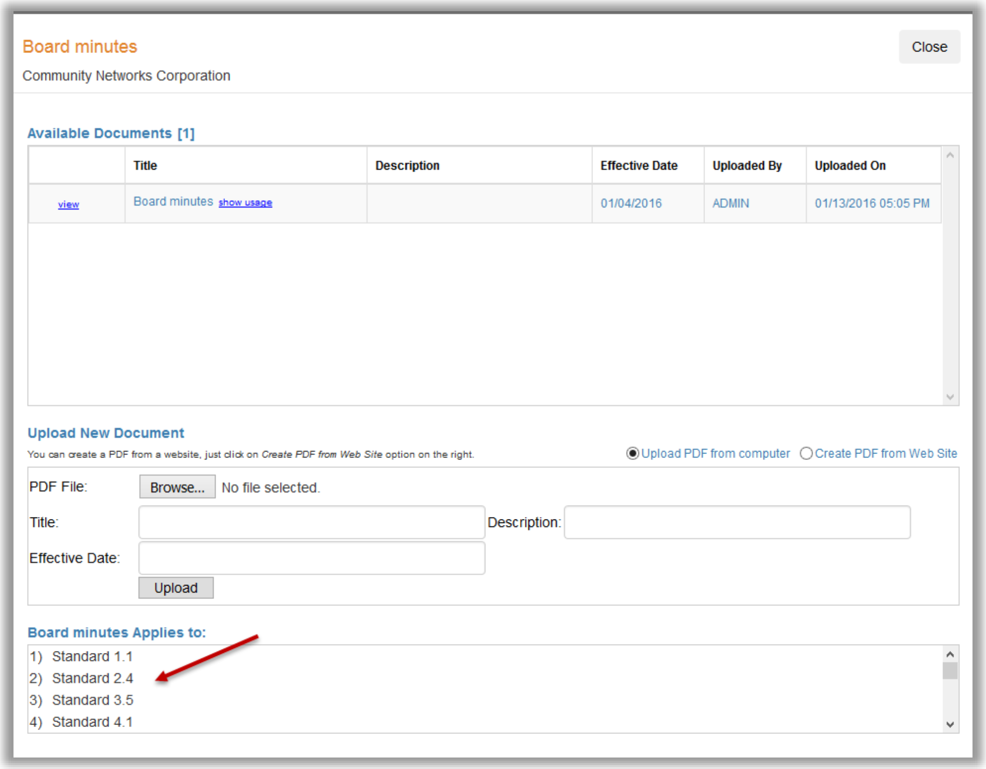
Document Types

Each standard has a list of document types.



Many document types are used for several different standards. Documents that are uploaded for a particular document type will be available for all standards that use that document type. When a document type link is selected, a pop-up window loads. If a document has already been uploaded for the selected type, it will appear under Available documents. Click ‘use’ to use the document on the standard. Click ‘view’ to open the pdf. Click the ‘show usage’ link next to the document title to see where this specific document is used throughout the assessment. The standards that a certain document type apply to are listed at the bottom of the document upload screen.

In this particular example, the document uploaded under Board Minutes on this standard is also going to be available to use on Standards 4.1, 4.4, 4.5, etc. (see arrow below).

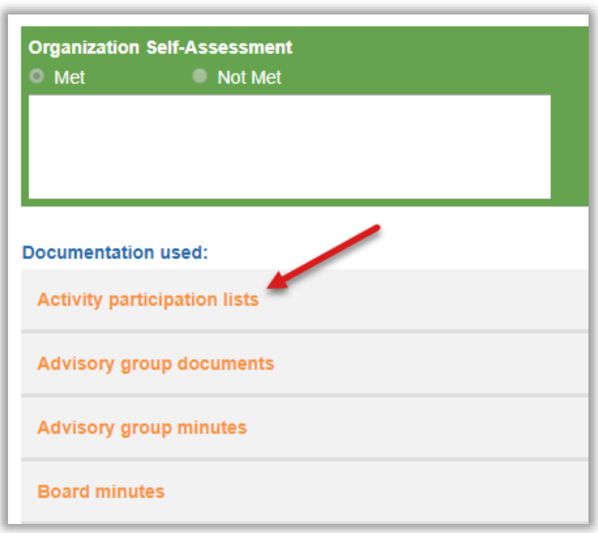


Document Upload

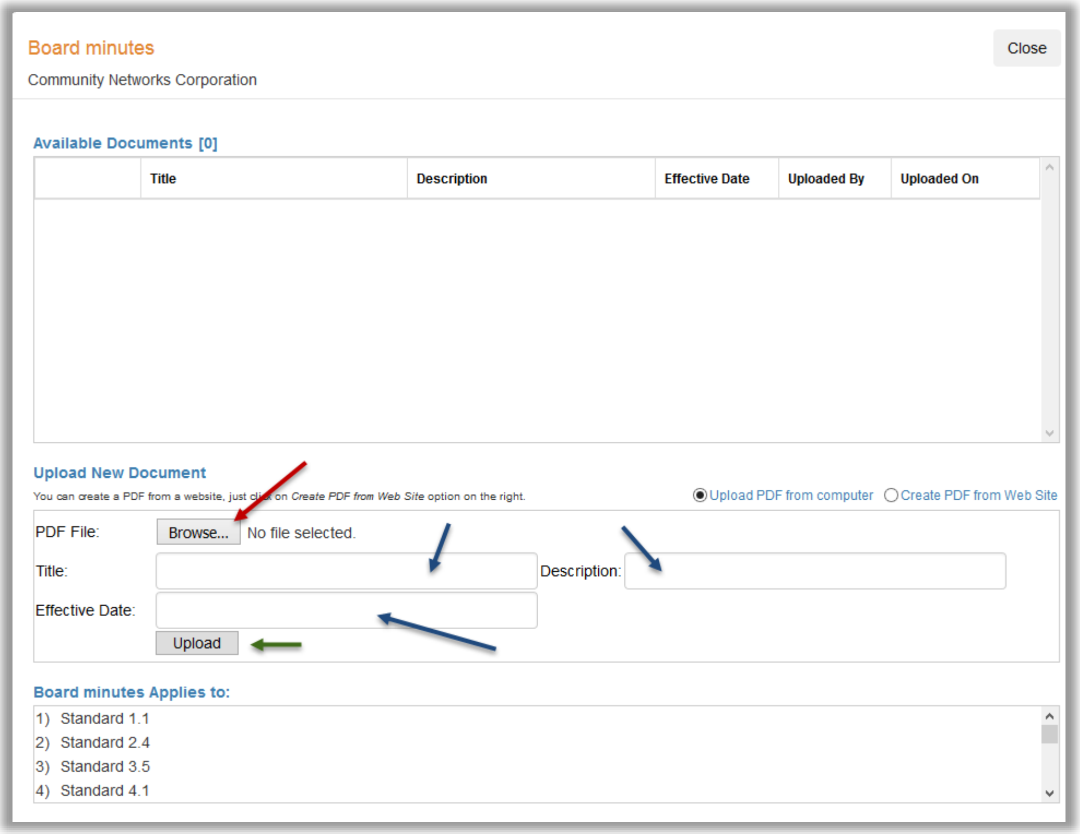
IMPORTANT: Only PDF documents are allowed.

Upload a Document

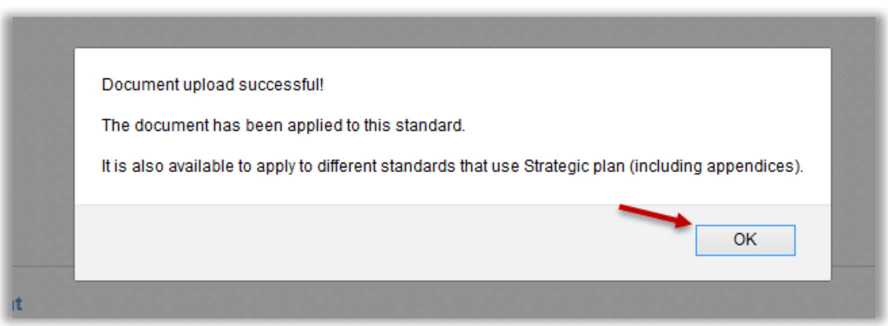
To upload documents for a certain document type, click on the document type link (red arrow).



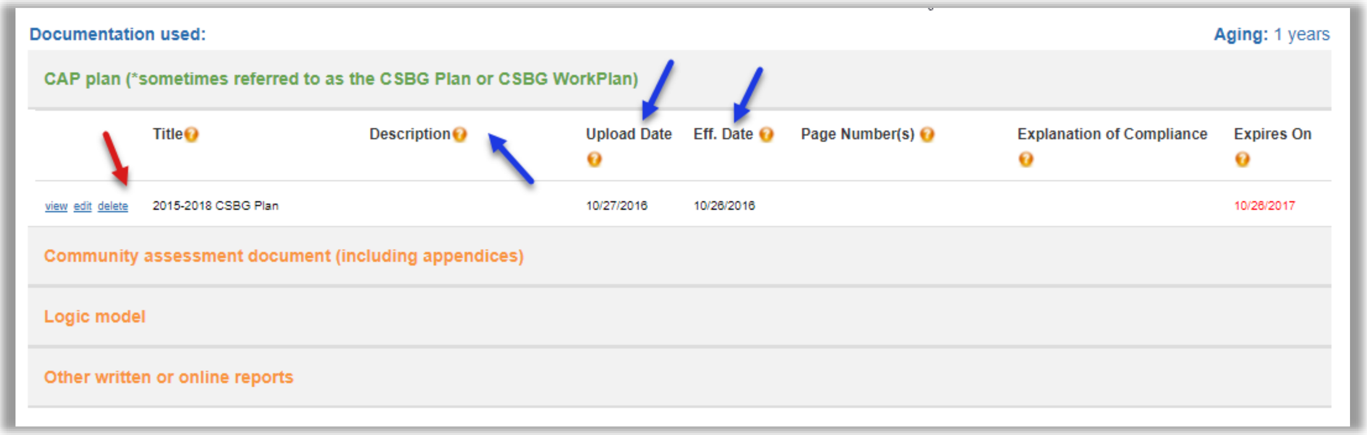
A document library pop-up window will load. To select a document, click the Browse… button (red arrow). Navigate to the location of the document in your file system and select the appropriate PDF document. Enter a title (required) and a description of the document being uploaded. An effective date is also required to upload a document. When the cursor is moved to the Effective Date field, a calendar tool will pop-up. Select the date or manually enter the date using the MM/DD/YYYY format. The effective date determines the age and expiration of a document. To upload the document, click Upload (green arrow).



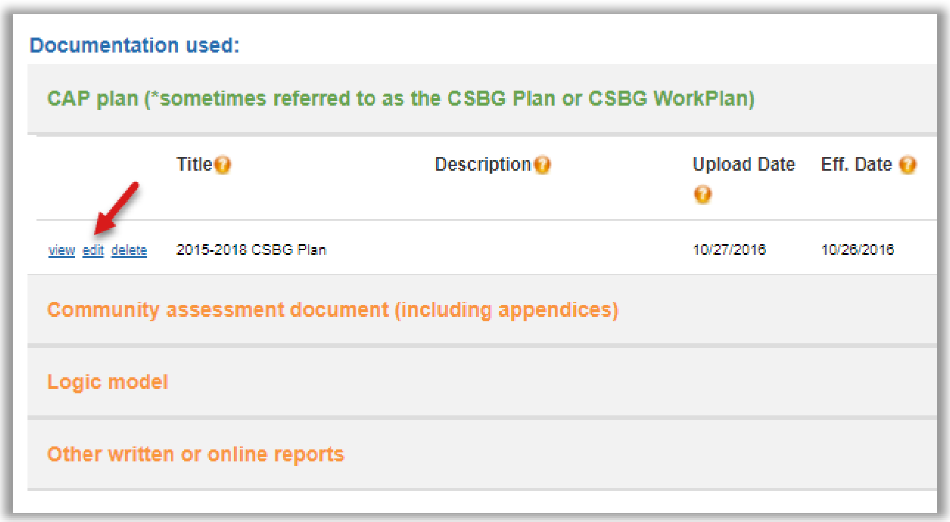
A pop-up will appear stating the document was successfully uploaded and it will automatically be applied for the standard. Click OK (red arrow).



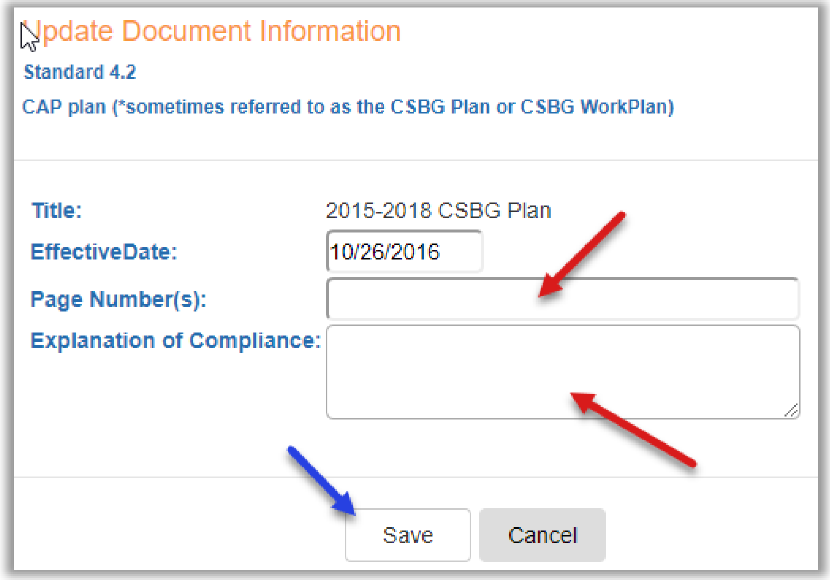
The document library displays the documents used to support a specific standard. Document types with an uploaded document are displayed in green. The document title is shown with a 'View', 'Edit' and 'Delete' link (red arrow). The description (if any), upload date and effective date are shown (blue arrows).



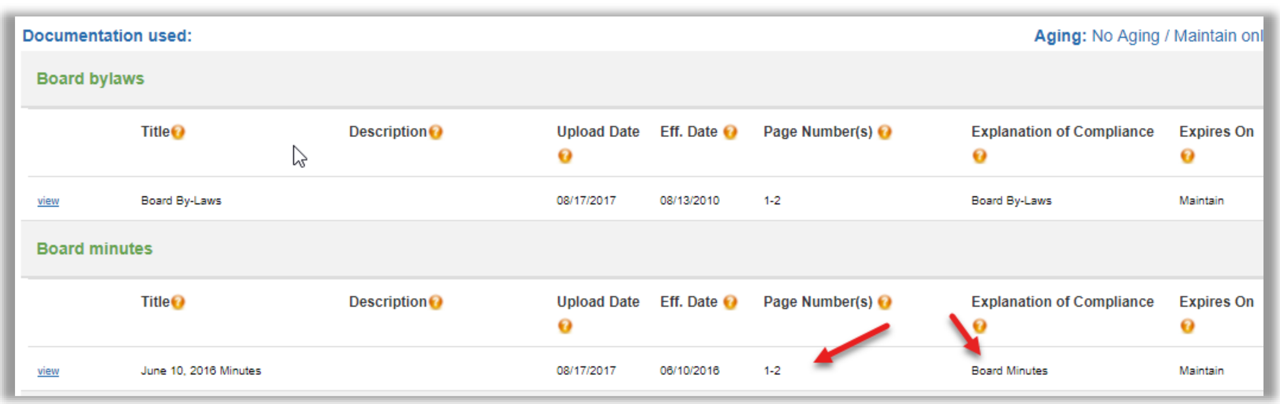
To direct the state agency to specific pages of the document that are relevant to the standard for which it has been uploaded, update the page number(s) field and Explanation of Compliance field. To do this, click the edit link (red arrow).



A pop-up window will load. Enter the relevant page numbers and an explanation of compliance in the respective fields (see red arrows). The effective date can also be changed. When all changes have been made, click Save (see blue arrow).

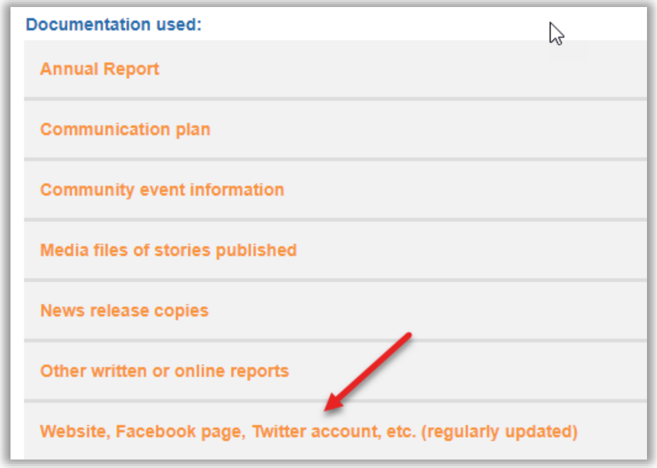


Updates will display in the row with the document (see red arrows).



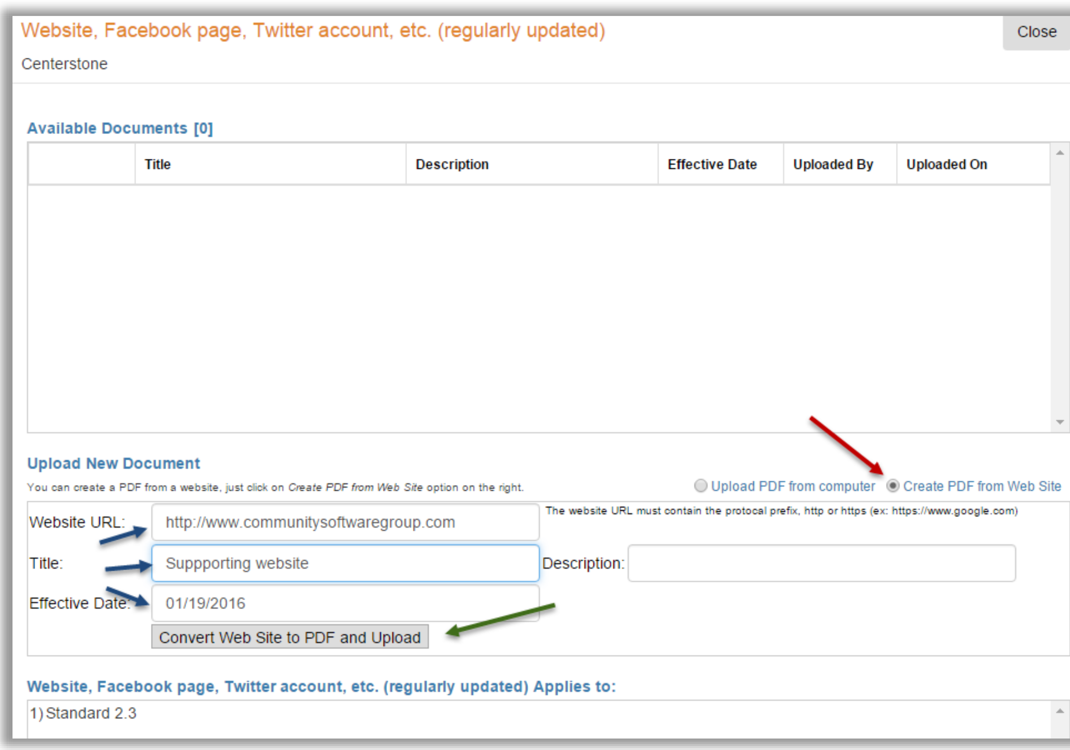
Upload a Website

Some standards may be supported by uploading a website or specific webpage. To do this, click on the document type "Website, Facebook page, Twitter Account, etc. (regularly updated) to open the document upload window (red arrow).



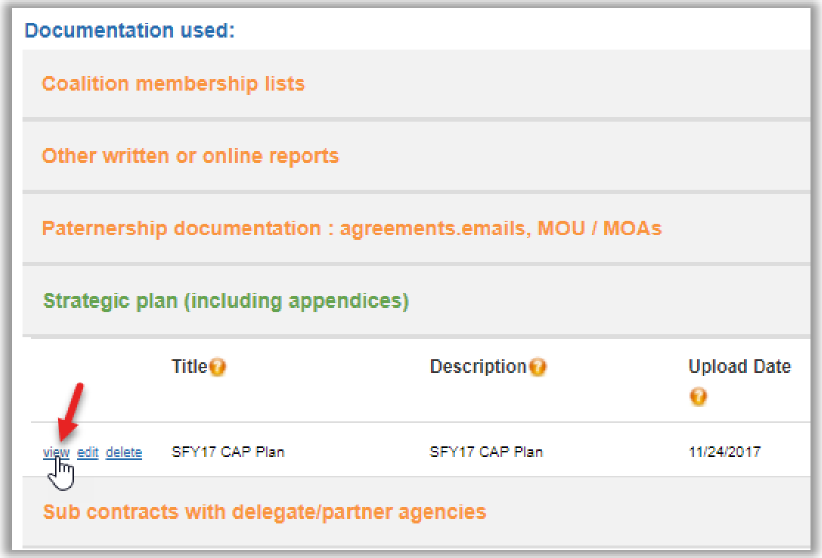
Select the "Create PDF from Web Site radio button (a radio button or option button is a graphical control that allows the user to choose only one of a predefined set of options) (see red arrow below). Enter the ***full website address*** in the Website URL field and select an Effective Date (blue arrows). Click 'Convert Web Site to PDF and Upload (green arrow). A pop-up will appear saying the document was uploaded successfully.

NOTE: This function does not work for websites that require a login. For a website that requires a login, a screenshot saved as a PDF will be the best option.



View a Document

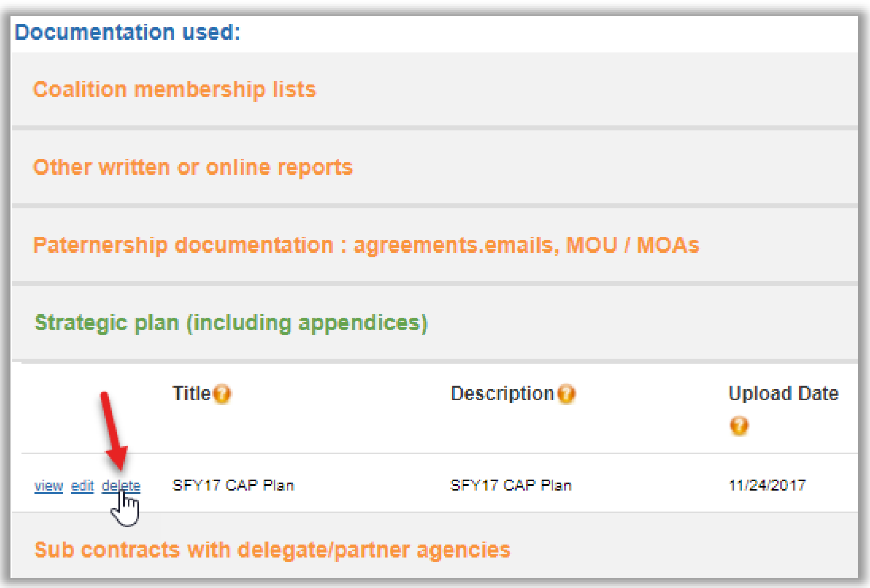
To view a document that has been uploaded, click the View link to the left of the document name (see arrow).



What happens next depends on the type of web browser being used. Internet Explorer, Google Chrome, Mozilla Firefox and Safari all handle pdf viewing differently. Some browsers are set up to view the pdf within the web browsers. Others download the file for the viewer to click on to open a PDF Reader.

Delete a Document

To delete a document, click delete next to the document that needs to be deleted.



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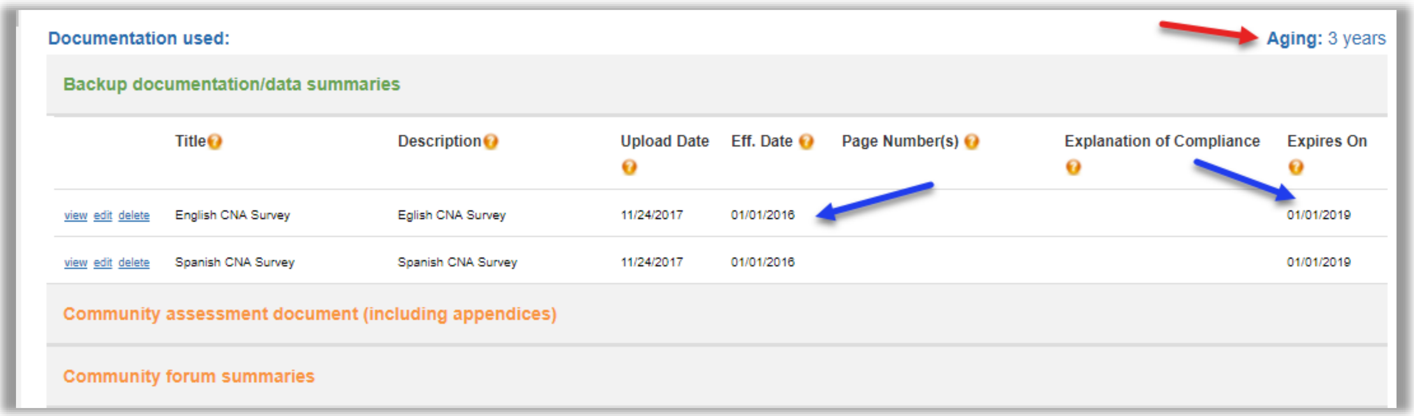
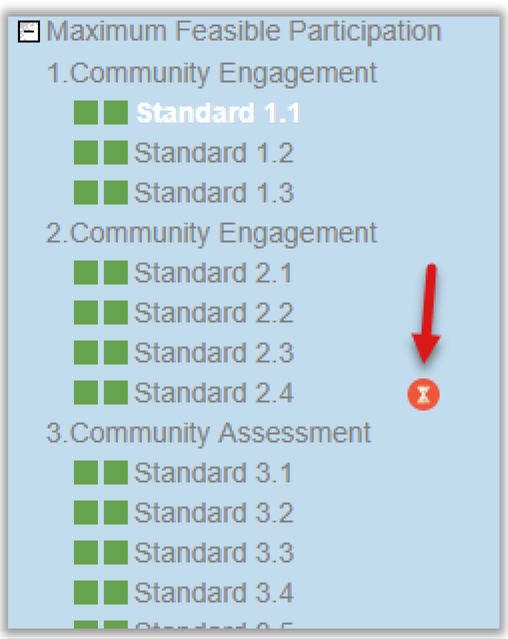
A pop-up will load confirming the delete. If you want to remove the document from the standard, click OK (see arrow). Deleting a document only removes the document from a particular standard. The document will still be available in the library to use on other standards.

Document Aging

Each standard has certain document aging rules and all documents uploaded for a given standard follow that same aging rule. The aging rule is posted to the far right of the document section (red arrow). The aging is calculated automatically using the effective date of the document and the expiration date is displayed in the 'Expires On' column (blue arrows).



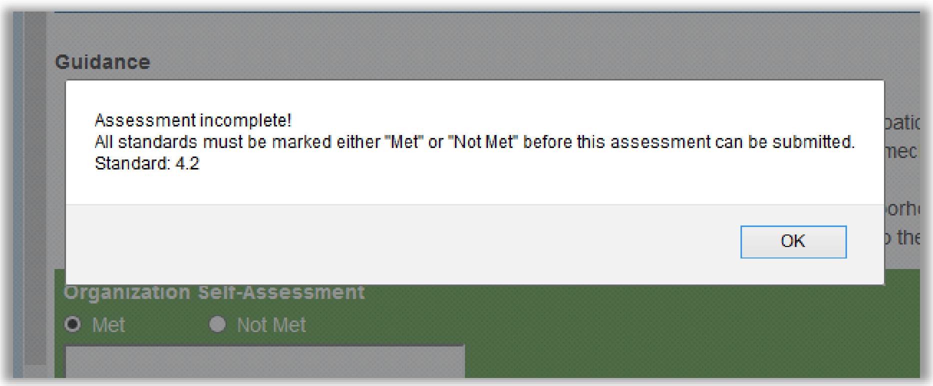
If a document is determined to be expired, an hourglass indicator will appear next the corresponding standard in the standards list (red arrow).

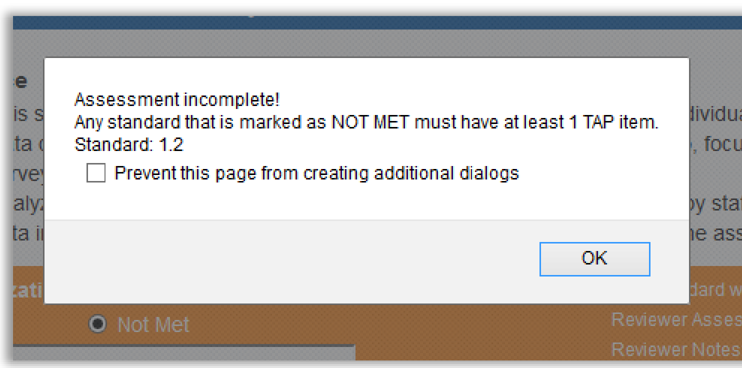


Sign and Submit

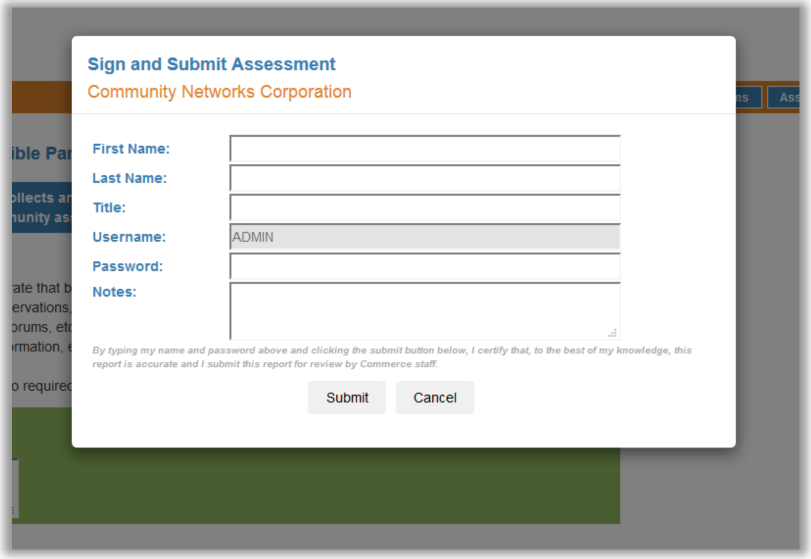
Once all standards have been set to ‘met’ or ‘not met’, all supporting documentation has been uploaded and TAPs added for any standard ‘not met’, click the Sign and Submit link.

If a standard has not been marked met or not met, a pop-up message will appear telling the user which standard needs attention. If a standard is marked not met and a TAP item has not been added, a pop-up message will appear telling the user which standard needs attention.





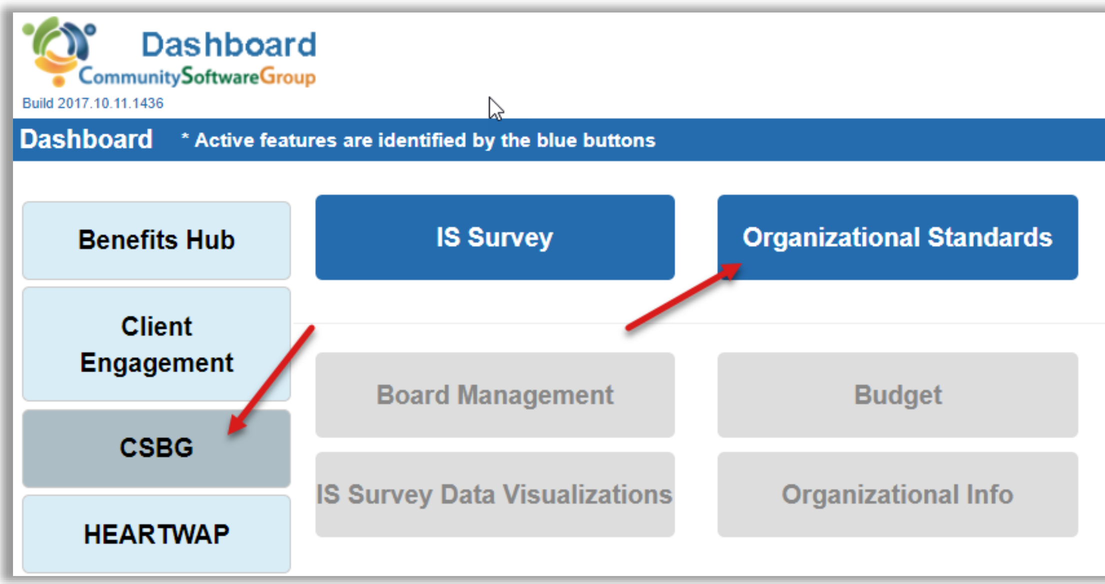
Once all requirements are met, a 'Sign and Submit Assessment' pop-up window will load. Enter first and last name, title and password (username will be populated automatically). Add any notes and click Submit.



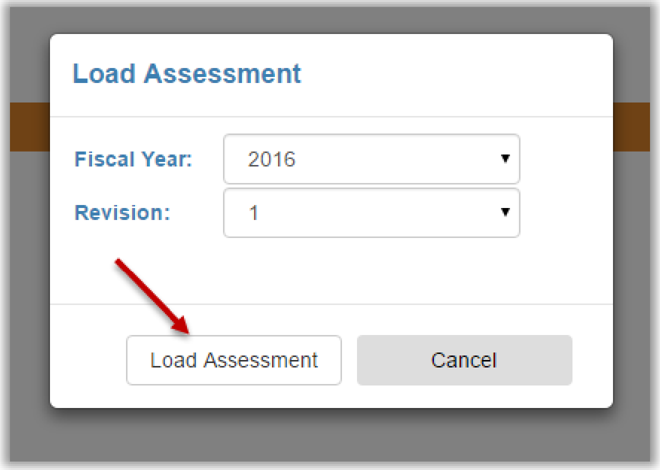
The state reviewers will receive an email notifying them your assessment has been submitted. Once the assessment has been reviewed, and the state has set a status, the submitter of the assessment will receive an email notifying them of the status.

Modify an Assessment

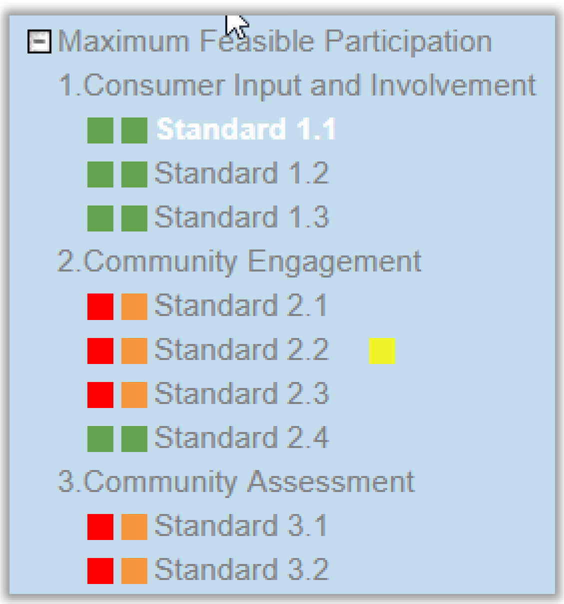
If modifications have been requested by the reviewing agency, a new revision needs to be created. Log into CSG Identity, and click the Organizational Standards tile from the CSBG section in the dashboard.



A load assessment pop-up will appear. Click "Load Assessment" (red arrow).



The standards list will display two columns of color-coded indicators. The inside set of indicators, or those closest to the standard link, displays the color-coding determined by the submitters selections. The outside column of indicators, or those farthest from the standard link, displays the state reviewer's selections. Green is 'Met', red is 'Not Met' and yellow (if applicable) is 'In Process'.



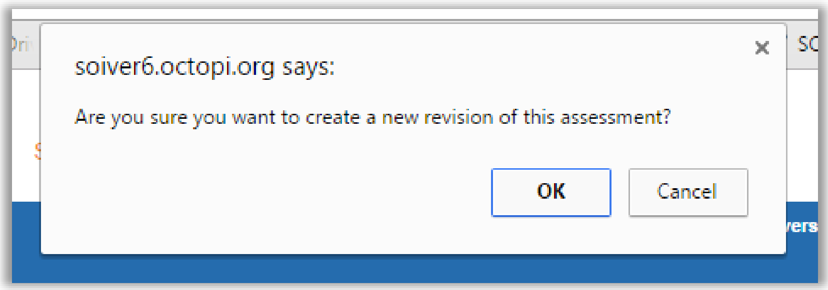
Some details in the assessment header will be different then when the assessment was originally created. The status will read "Reviewed-Modifications Requested" or "Returned without Review".

Create a new Revision

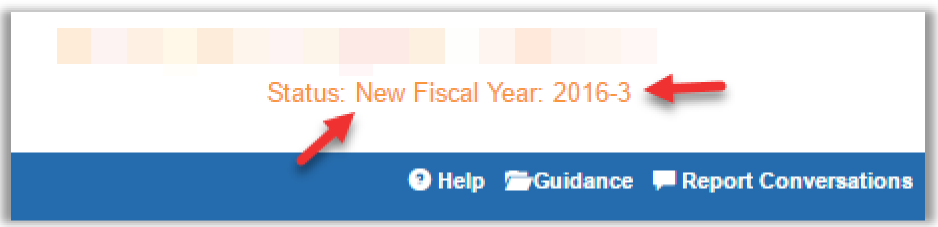
If an assessment has the status of ""Reviewed-Modifications Requested" or "Returned without Review", a new revision will need to be created.

A Create New Revision button will be available in the header. Click Create New Revision (black arrow).

The system will ask for verification that a new revision should be created.



The header will change again. The Status will now be "New" and the next revision number will appear after the fiscal year (red arrows).



Select a standard that requires attention – one with a red or yellow indicator.

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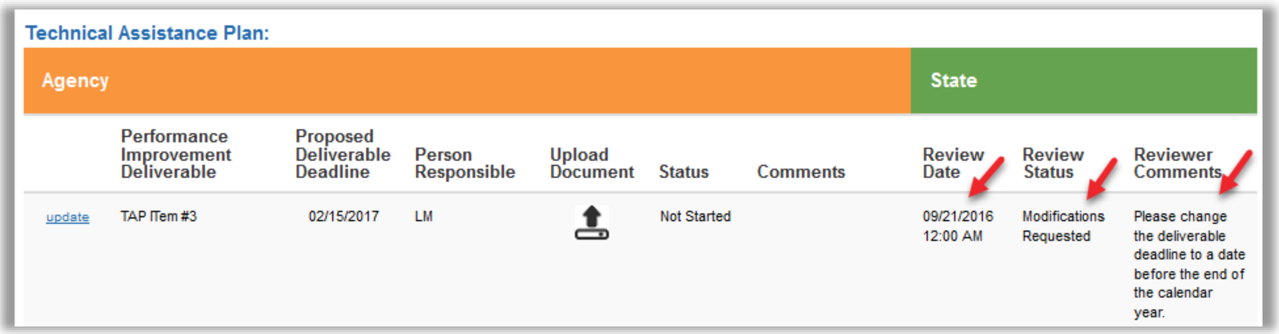
Details on the review will be displayed in the color coded self-assessment section. Who reviewed the assessment and when, the reviewer's assessment and any comments (black arrow).

Update a TAP

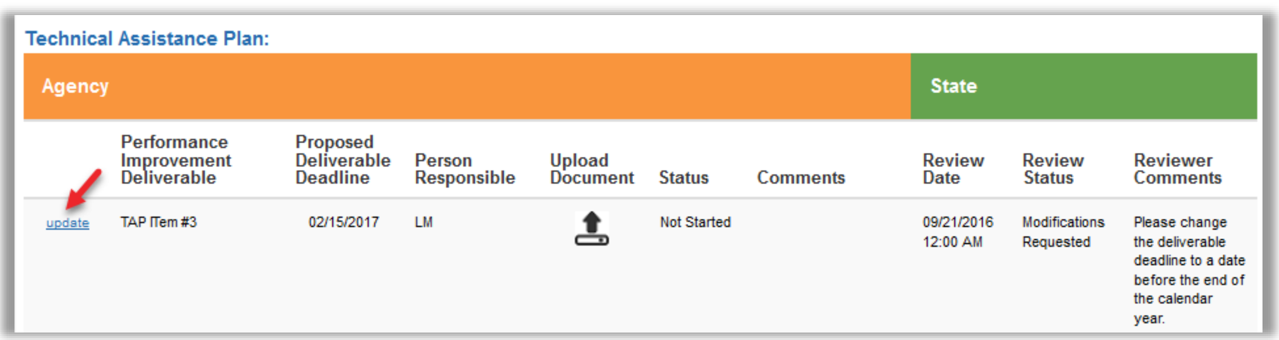
When a TAP item has been reviewed, the details will show up under the State section under the green header. The user who last saved the assessment will receive an email notifying them that a TAP has been reviewed.



Technical Assistance Plan:

Agency							State		
	Performance Improvement Deliverable	Proposed Deliverable Deadline	Person Responsible	Upload Document	Status	Comments	Review Date	Review Status	Reviewer Comments
update	TAP ITem #3	02/15/2017	LM		Not Started		09/21/2016 12:00 AM	Modifications Requested	Please change the deliverable deadline to a date before the end of the calendar year.

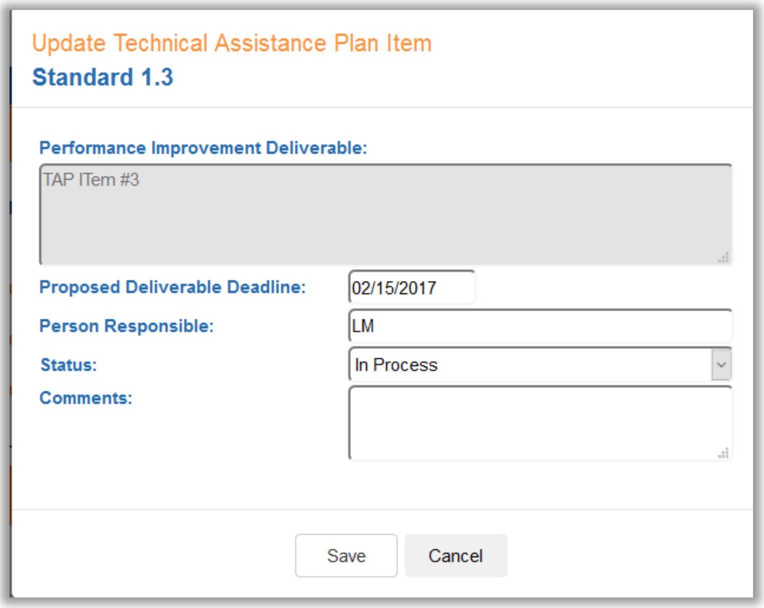
Now that the TAP item has been reviewed, users may submit an update to a TAP, if required. If a TAP item has the status of Modifications Requested, an update is required. To do this, click update.



Technical Assistance Plan:

Agency							State		
	Performance Improvement Deliverable	Proposed Deliverable Deadline	Person Responsible	Upload Document	Status	Comments	Review Date	Review Status	Reviewer Comments
update	TAP ITem #3	02/15/2017	LM		Not Started		09/21/2016 12:00 AM	Modifications Requested	Please change the deliverable deadline to a date before the end of the calendar year.

The Update Technical Assistance Plan Item pop-up will load. The actual deliverable cannot be modified but the deadline and person responsible can be changed and the status can be set, as well. The status is relevant to this update to the original TAP. Add any comments and click Add.



TAP items can be updated at any time, independently from the assessment. TAP items can continue to be updated and reviewed after an assessment has been accepted, but new TAP's cannot be added.

When the status of a TAP or update is set to Completed, the state agency will receive an email notifying them that a TAP has been completed.

Color indicators to the right of the standards that are Not Met, show the status of the TAP items. The inside set of indicators, or those closest to the standard link, shows the TAP status of the submitter. The outside column of indicators, or those farthest from the standard link, displays the review status of a TAP. Tool tips will appear when the cursor is placed over an indicator. The submitter status of In Process is shown in yellow and Completed in Green.   Review status of Modifications Requested is shown in orange and Completed is shown in green (see following image).

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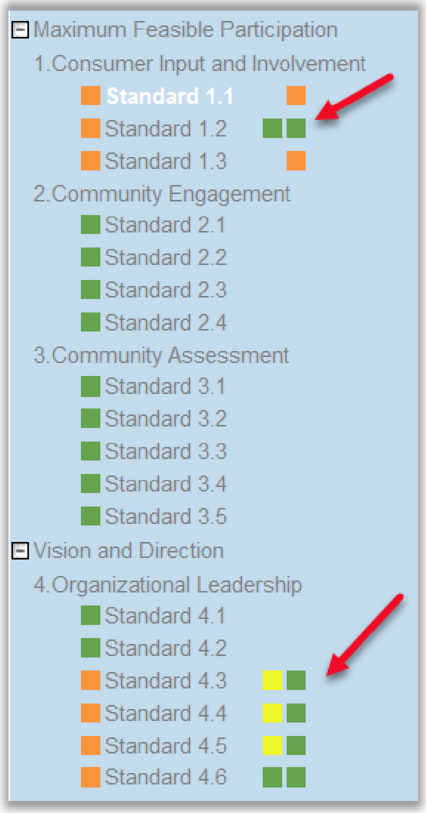

Once all of the standards requiring attention have been addressed, [sign and submit the assessment]() again. This submit and review process will repeat as long as necessary until an assessment has been accepted.