

i The steps below outline how to generate a Dashboard Report. This will enable you to execute numerous tasks within the Administrator Portal.

STEP 1

Click the **“DASHBOARD” (1)** tab within the Administrator Portal.

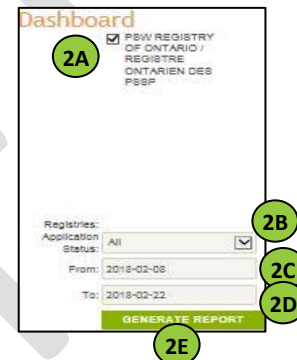


STEP 2

Check the box next to **“PSW Registry OF ONTARIO” (2A)**. A check mark (✓) will appear.

Click the **“Application Status” (2B)** dropdown button and select **“All.”**

Click the **“FROM” (2C)** and **“TO” (2D)** fields to choose the appropriate dates for your report, then click the **“GENERATE REPORT” (2E)** button.



i By changing the “Application Status” dropdown menu from the default “All” option, you will be able to generate results of applicants/registrants who have a specific registry status. For example, if you only want applicants whose applications are in progress, change this to “In Progress.”

STEP 3

A new web browser tab with the **Dashboard Report (3A)** will open.

To do a report-wide search, you can type your search criteria in the **“Search” (3B)** field above the table.

Alternatively, you can search for data within each of the data columns. To do this, type your search criteria in the **“Search” (3C)** fields at the bottom of each data field column.

3A

Dashboard

Registry: 1
Application Status: ALL
Date: 2018-02-08 to 2018-02-22
Applicants/Members: 22

Search:

3B

Account ID	Comments	Name	Admin Assigned	Internal Complaint Status	Date of Account Creation	Registry Listing Status	Application Status	Form	Completed	Date Completed	Email Date
000001	3	9999999999999999	999		2018-02-21			Application	✓	2018-02-22	
000001	3	9999999999999999	999		2018-02-21			Trn 1 Approval	✓	2018-02-21	
000001	3	9999999999999999	999		2018-02-21			Trn 2 Approval	X		
000001	3	9999999999999999	999		2018-02-21			Registry Admin Form	X		

Search:

3C

Guidelines for using the Dashboard Report

A **Dashboard**

Registry: 1
Application Status: ALL
Date: 2018-02-08 to 2018-02-22
Applicants/Members: 32
Search:

B

SAVE EXPORT REPORT HELP

Account ID	Comments	Name	Admin Assigned	Internal Complaint Status	Date of Account Creation	Registry Viewing Status	Application Status	Form	Completed	Date Completed	Email Date
000001	0	999test155, Helen	edit		2018-02-21			Application	✓	2018-02-22	
000001	0	999test155, Helen	edit		2018-02-21			Tier 1 Approval	✓	2018-02-21	
000001	0	999test155, Helen	edit		2018-02-21			Tier 2 Approval	✗		
000001	0	999test155, Helen	edit		2018-02-21			Registry Admin Form	✗		

Search Search Search Search Search Search Search Search Search Search

Overview of the Dashboard

The **Dashboard Report (A)** is a high-level overview of all applicants and registrants, with the **exception** of terminated applicants. The Dashboard Report can be exported into Excel by clicking the **“EXPORT REPORT” (B)** button in order to execute analytical work for reporting purposes.

Each applicant or registrant will have four entries in the **Dashboard Report**, one for each of the Forms that are required to be completed prior to being active on the Registry. The purpose of the four entries is to quickly check the progress of the applicant and to determine which activities are pending.

Description of Data Fields:

Account ID	<p>Applicant’s/registrant’s ID that is generated by the Registry during account creation.</p> <p>This will lead you to the Applicant/Member Forms page, where you can upload files and update the following forms:</p> <ul style="list-style-type: none"> • Application • Tier 1 Approval • Tier 2 Approval • Registry Admin Form
Comments	<p>Add and track comments made by an administrator.</p> <p>A pop-up will appear to add a comment.</p>
Name	Applicant’s/registrant’s name
Admin Assigned	Name of Tier 1 Administrator who has assigned themselves to processing the PSW’s application.



	<p>If this column has “edit” instead of a Tier 1 Administrator’s name, then the applicant does not have a Tier 1 Administrator assigned.</p> <p>Clicking on the “edit” button will lead you to the Applicant/Member Profile page, where you can assign an administrator to the account and update the forms and statuses, as required.</p>
Internal Complaint Status	<p>Indicates if an applicant/registrant has a complaint against them and/or where the complaint is in terms of processing and outcomes. Note: This is an internal status for use by administrators. This status does not impact whether an applicant/registrant will be viewable or not viewable on the employer-facing registry.</p>
Date of Account Creation	<p>Date the applicant/registrant account was created.</p>
Registry Viewing Status	<p>Tracks the applicant’s/registrant’s status in the Registry.</p> <p>Depending on the status, the applicant/registrant will either be viewable or not viewable on the employer-facing Registry. The data for applicants/registrants who are not viewable will remain in the Registry, but will not be viewable by employers.</p>
Application Status	<p>Tracks the progress of an applicant’s application in the Registry.</p> <p>The status will act as a flag to Tier 1 and Tier 2 when action is required for their respective roles.</p>
Form	<p>Identify all forms associated with an applicant/registrant.</p>
Completed	<p>“X” indicates that the form is incomplete and a check mark (✓) indicates that a form is complete.</p> <p>Note: to search in this data field, type “1” for complete and “0” for incomplete.</p>
Date Completed	<p>Date the Form was completed.</p>
Email Date	<p>The most recent date that a reminder email was sent to an applicant.</p>