Introduction This job aid is intended as a quick reference guide for Site Managers on the following topics. For details, see the SMART FACTS Operations Manual.

- SMART FACTS user accounts (licenses)
  - User roles in SMART FACTS
  - Costs and payment for user accounts
  - New user accounts and making changes to existing accounts
  - Sharing user accounts
- Site Administration Menu in SMART FACTS
  - Manage Staff Accounts
  - Delete Fakes
  - Merge Duplicates

User Roles in SMART FACTS

The SMP Project Director is responsible for determining who will have access to SMART FACTS at their SMP, and what each user's role will be.

User Role	Description
Staff level account	The Staff level account provides the most basic access available in SMART FACTS, and is designed specifically for data entry. Staff level users can view and edit only their own data, and have no access to Letters, Forms & Reports, Standard Reports, or other "manager-level" functions described below. Users who only need to enter data should be set up as Staff.
Program Manager account	Program Managers (PMs) can enter data and review and edit their own data. They can also review and edit the data of Staff level users, but not the data of other PMs or Site Managers. PMs can access Letters, Forms and Reports and ETO Reports (but not *Standard Reports*). Users who manage complex issues and/or review and edit Staff data should be set up as PMs.
Site Manager account	Site Managers (SMs) can enter data and can also manage data for all users within their SMP, except other SMs. At this level, access includes all types of reports and all other functions described in this job aid, including the ability to change other users' roles. Since Site Managers can't review or edit the work of other SMs, having more than one SM makes quality control difficult. It is recommended that each SMP have only one Site Manager (usually the SMP Project Director).
Enterprise Manager account	Enterprise Managers (EMs) have access to every SMP site in order to review all SMP data, assist SMPs with their data, etc. Additional menu options appear for enterprise users which do not apply to SMPs. Besides Social Solutions staff, Ginny Paulson, Heather Flory, and Sara Engelken (The Center), Lucia Fort (OIG), and Josh Hodges (AoA) are the only authorized EMs.

Costs and Payment for SMART FACTS User Accounts

Up to five complimentary user accounts are available to each SMP, paid for by The Center through a grant from AoA. CMS representatives (PSCs, ZPICs, MEDICs, and RO DOI Liaisons) pay for their own user accounts. Additional accounts beyond the first five can be purchased from Social Solutions for an annual cost of $165* per additional account, paid for by the SMP.

**New pricing system effective October 1, 2011.*

Making Changes to User Accounts in SMART FACTS

Site Managers can make many changes themselves in SMART FACTS, as described in this job aid. However, in some instances the Site Manager may need to contact The Center and/or Social Solutions for assistance.

Who can do it?	Change Request / Issue

Site Manager (usually SMP Director)	• Make updates to current user accounts (see p. 3–5)
	  o Do <u>not</u> change the name on an account!
	  o Do <u>not</u> edit PSC/MEDIC/ZPIC/RO DOI users!
	• Authorize new user accounts, after the first five, at SMP expense (for the first five, contact The Center)
	• Contact Heather or Ginny for help as needed

The Center	• Set up new user accounts, up to the first five • Disable Site Manager accounts, if needed • Authorize and manage CMS representative accounts
Social Solutions (upon request)	• Setup of additional user accounts over the complimentary 5, at request of the SMP

New SMART FACTS User Accounts

To set up a new SMART FACTS user account, take the following steps.

Step	Action
1	If the new user is replacing a previous user, disable the previous user's account (see ***Managing Staff Accounts***, on page 3).
2a	If you are <u>not</u> using all five of the complimentary user accounts, e-mail hflory@smpresource.org, and provide the following: • The new user's name and e-mail address (***Note:*** Social Solutions requires an e-mail address as the user name for new accounts.) • The desired SMART FACTS user role (see page 1) • The programs to assign (i.e. "all four programs" or "all but the Complex Issues and Referrals program")
2b	If you <u>are</u> already using all five complimentary user accounts for your SMP, contact Kristen Roberts at Social Solutions to purchase and set up any additional accounts at your SMP's expense. E-mail: kroberts@socialsolutions.com or call: (773) 919-0457.

Sharing SMART FACTS User Accounts

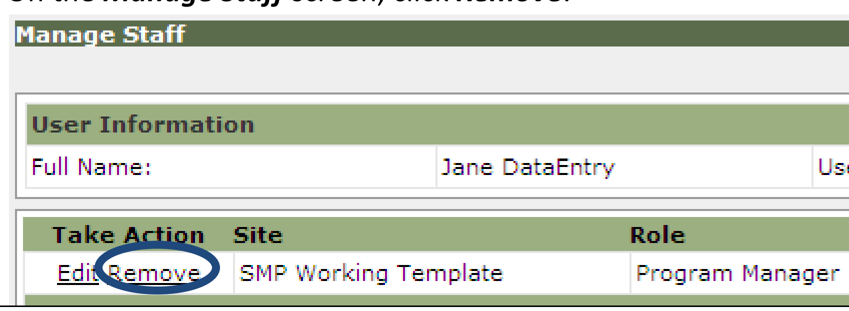
Sharing staff and program manager user accounts is not recommended. To protect the security and integrity of the data, Site Managers should NOT share their logon information with other users.

Managing Staff Accounts: Overview

The ***Manage Staff Accounts*** option is used to disable or edit an account. From this screen, you will see accounts for: your SMP, CMS representatives assigned to your SMP (PSCs, ZPICs, MEDICs, RO DOI Liaisons), and Enterprise Managers (Center, AoA, OIG). <u>Do not change</u> CMS representative accounts.

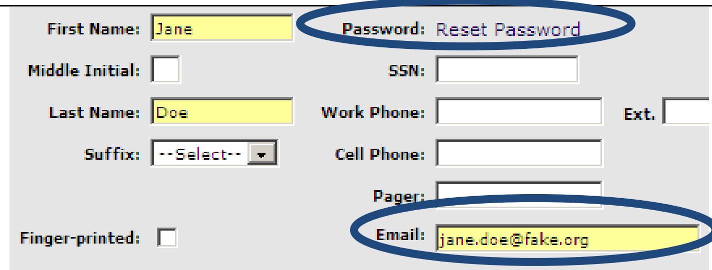
Managing Staff Accounts: Disabling a User Account

When a user leaves your SMP or no longer needs SMART FACTS access, take the following steps to disable their account:

Step	Action
1	In the ***Site Administration*** menu, select ***Manage Staff Accounts***. Note: To view disabled accounts, click ***Show Disabled Accounts***. When an account is disabled, <u>new</u> data cannot be entered under the account, thought data previously entered under that account will still appear in reports.
2	Find the account to disable. To the far right, click ***Site / Program Information***.
3	On the ***Manage Staff*** screen, click ***Remove***. 
4	At the prompt, click ***OK*** to disable, or ***Cancel*** if you do not want to disable the account. 

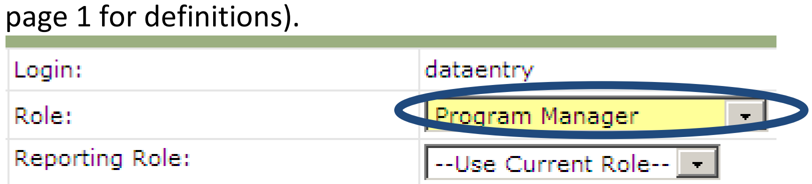
Managing Staff Accounts: Editing e-mail addresses and Re-setting a password

To change a user's e-mail address or to re-set a user's password:

Step	Action
1	In the ***Site Administration*** menu, select ***Manage Staff Accounts***.
2	Click the ***Edit*** link for the account you would like to edit (right side).
3	 A. To change the e-mail address, enter the new **E-mail** address. o Note***:*** This e-mail address is used by Social Solutions to send "forgot your password?" e-mails, system update news, etc. B. To reset the password, click ***Reset Password.*** o Note: Use this option if no one knows the password for a particular account and the ***Forgot your password*** option on the SMART FACTS login page does not work. *Reminder: Do NOT change the name on an account! (see page 2)*
4	Click ***Submit*** to save your changes.

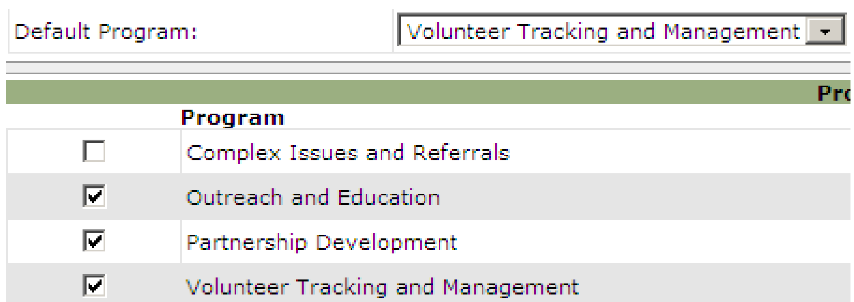
Managing Staff Accounts: Changing a User's SMART FACTS Role

To change a user's role in SMART FACTS, take the following steps:

Step	Action
1	In the ***Site Administration*** menu, select ***Manage Staff Accounts***.
2	Click the ***Site/Program Information*** link for the user whose role you would like to change (right side).
3	Click ***Edit*** (on the left).
4	Select the appropriate option from the ***Role*** drop-down menu (see page 1 for definitions).  Note: The ***Reporting Role*** should be the same as the ***Role***, so "Use Current Role" should be selected. For more information, contact The Center or Social Solutions.
4	Click ***Submit*** to save your changes.

Managing Staff Accounts: Editing Program Information

To change the programs available to a user or to change a user's default program, take the following steps:

Step	Action
1	In the ***Site Administration*** menu, select ***Manage Staff Accounts***.
2	Click the ***Site/Program Information*** link for the user whose programs you would like to change (right side).
3	Click ***Edit*** (on the left).
4	A. To change the default program (the one that appears when you first log in to SMART FACTS), select the desired option from the ***Default Program*** drop-down menu. In this example, ***Volunteer Tracking & Management*** is the default program.  B. Place a checkmark next to each program you would like to assign to the user. De-select the checkmark next to any program that you would like to remove. In this example, this user will not be handling complex issues, so the ***Complex Issues and Referrals*** checkbox has been de-selected.
4	Click ***Save***.

Deleting Fakes

The ***Delete Fakes*** option is used to delete fake entries which were entered for practice purposes. This option is also used to delete volunteers who were entered in error – in this situation, contact the Center for assistance.

Fake Participants (Complex Issues)	The complainant's first name must be "Fake" in order to delete as a fake entry.
Fake Entities (Volunteers/Partners)	The volunteer or partner's first name must be "Fake" in order to delete as a fake entry. All data associated with fake entities will be deleted automatically.
Fake Point of Service Elements (Volunteer/Partner hours)	If Fake entities are removed properly, there is no need to use this feature.

Deleting Fakes, *continued*

To delete fake entries, take the following steps:

Step	Action
1	Select the appropriate program: A. Complex Issues & Referrals – delete fake complex issues complainants B. Volunteer Tracking & Management – delete fake volunteers C. Partnership Development – delete fake partners
2	Confirm that the FIRST NAME for each of the fake complainants, volunteers and/or partners are 'Fake'. If any of the names includes a prefix (i.e. Mrs. or Dr.), the prefix must be removed before deleting fake entries. (Tip: On the ***View/Edit*** volunteer screen, in the ***Contact Info*** section, click ***Edit*** on the far right.) Count the total number of fake entries to make sure that the number that appears later on the ***Delete Fakes*** screen is correct.
3	In the ***Site Administration*** menu, select ***Delete Fakes***.
4	Check the box(es) next to the item(s) to delete, and click ***Delete***.
5	Click ***OK*** to permanently delete the fake entries from your site.

Merging Duplicates and Merging Volunteers/Partners

The ***Merge*** option is used if multiple records were created for the same complainant or volunteer/partner in error.
Note: Users with a Site or Program Manager role can merge duplicates.

Step	Action
1	Select the appropriate program based on the type of data to merge: A. Complex Issues & Referrals – merge complex issues complainants Note: If multiple inquiry forms were entered for one complainant with multiple issues, each inquiry form will stay separate once duplicates are merged. B. Volunteer Tracking & Management – merge volunteers C. Partnership Development – merge partners
2	Search using the options provided on the screen, and click ***Go***.
3	Check the duplicate listings to merge, then click ***Continue.***
4	Select the master listing (i.e. the one with most and/or best data).
5	Read the warning that appears. Select ***Yes*** if you would like to merge the duplicate entries. Click ***OK***.
6	Next, delete old contact records. In the ***View/Edit*** screen select the listing with the least data and select ***Delete*** after the name.