

# DFB Dashboard User Guide 2021

Version 1.0





# Table of Contents

Table of Contents.....	2
1. Logging In.....	4
Log In.....	4
Forgot Password.....	4
Password Reset Email.....	5
2. Alerts & Resources.....	6
Alert Preview Popup.....	6
Resources.....	7
3. Test Results.....	8
Test Results Search.....	8
Search Criteria.....	8
Actions.....	8
Grid Actions.....	8
4. Selections.....	9
Selections Search.....	9
Actions.....	9
Grid Actions.....	9
5. Workers Menu.....	10
Add a Worker.....	10
Actions.....	10
Grid Actions.....	10
My Roster.....	10
Actions.....	10
Grid Actions.....	10
New Worker.....	10
Actions.....	10
Worker Detail.....	11
Actions:.....	11
Test Result History (Worker Detail).....	11
Grid Actions:.....	11
Selection History (Worker Detail).....	11
Grid Actions:.....	11



Roster History (Worker Detail) ..... 11

Worker Status Log (Worker Detail) ..... 11

6. Reports ..... 12

    Donor Notification Report ..... 12

    DOT MIS Report ..... 12

    Test Result Summary Report ..... 12

    Roster History Report ..... 12



# 1. Logging In

Users can log in to the application at [dashboard.drugfreebusiness.org](http://dashboard.drugfreebusiness.org). On initial log in, or if login fails, users will have option to reset their password.

## Log In

Once connected to the application, Users will first see the Log In detail form. Users must enter a valid email address and the correct password, then select the "Log In" Action. If the entered information is correct, you will see the Welcome Screen. If not, you will be warned that the email address or password is incorrect.

If a User fails to log in, they should select the "Click here to reset" Action at the bottom of the screen to go to the "Forgot Password" detail form.

## Forgot Password

The "Forgot Password" detail form can be accessed from "Log In" and is intended for Users who have failed to log in to the application. To begin the process of resetting their password, the User should enter the email address they believe is associated with their Contact record.

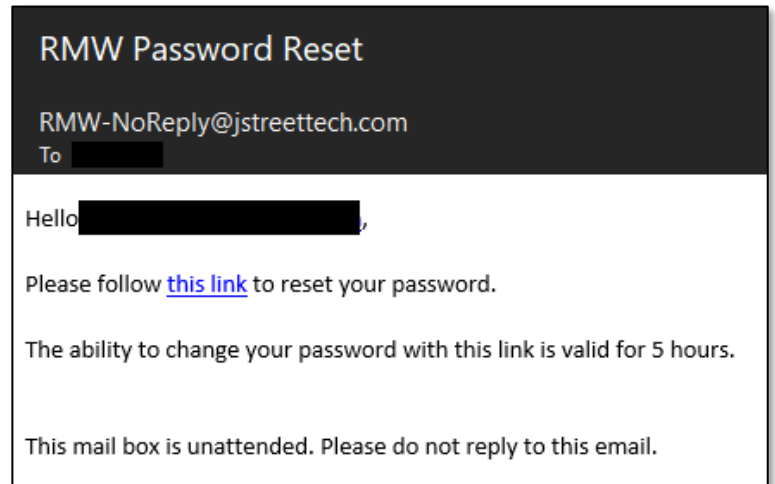


## Password Reset Email

As the Forgot Password confirmation message indicates, the User should then check the inbox matching the entered email address. The RMW Password Reset email should be waiting for them – if it's not, they should wait 5-10 minutes for it to show up. If it still doesn't show up, it's likely that they either are mistaken as to which email address they use to log into the application, or they do not have credentials to access the application.

In either case, the User should contact DFB for further instruction or assistance.

Once the RMW Password Reset email has been received, the User should follow the link in the email to access the "Reset Password" detail form.



## Reset Password

The "Reset Password" detail form is accessed from the Password Reset email and is intended for Users who need to change their password. To reset their password, the User should enter the email address associated with their RMW account, then enter their desired password twice.

Once the User has entered a valid email address, and matching passwords, selecting the "Reset Password" Action will overwrite their password with the new one and show the Set/Reset Password confirmation message, below. The User can then follow the hyperlink to get to the "Log In" detail form.

Log In

**Reset Password**

Email:

New Password:

Confirm New Password:

Reset Password

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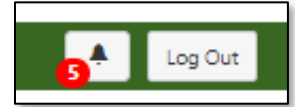


## 2. Alerts & Resources

Alerts and Resources can be viewed by any Users with RMW permissions.

### Alert Preview Popup

Selecting the “bell” Action will open the Alert Preview Popup (*Figure 1*, below) and preview the Alert Title and Alert Description.



The Alert Preview Popup is accessed by selecting the “bell” Action from anywhere in the application and shows undismissed Alerts assigned to the logged in User, with the option to Dismiss the alert using the “x” Action. When dismissed, the application records the time and date the Alert was dismissed as a verification that the message was read. For most Users, this is as much as they will interact with Alerts.

To view all undismissed Alerts assigned to the logged in User, or to create a new Alert, the logged in User can select the “View All Alerts” Action in the bottom-right corner of the Alert Preview Popup.

Date	Title	Description	Actions
3/13/2020	Alert Title	Alert Description text. This field can be up to 500 characters.	⊗
3/13/2020	New MIS forms are available now!	Check out the Reports menu option to generate all the data you need for this year's MIS report. Remember to call if you have any questions.	⊗
3/13/2020	New video guides available in Resources.	We've heard some feedback that additional training is needed on creating new Worker records. A new video has been posted to Resources that will walk you through the process.	⊗
3/13/2020	Be audit-ready! Clean up your Unmet Selections	Make sure to check out the Selections tab and schedule tests to fill those Selections.	⊗

Showing 1 to 4 of 4 entries. Previous 1 Next


### Alerts

The Alerts list form is accessed by selecting the “View All Alerts” Action on the Alert Preview Popup and is intended for Users who would like to see a sortable list of their Alerts.













## Resources

The Resources list form is accessed from anywhere in the application by selecting the “Resources” top-level menu item. This form contains a configurable list of URLs, published and managed by Users with WebGod permissions. This form is intended to serve as a central location for helpful links and tools and can be accessed by anyone with credentials to access the application.

Test Results Selections Workers Physician Center Resources  Log Out

### Resources

Show  entries

Date	Description	URL ▲	Actions
			<b>+</b>
9/30/2019 1:45 PM	Need to access the old RMW? Click here:	<a href="https://rmw.drugfreebusiness.org/">https://rmw.drugfreebusiness.org/</a>	 
9/27/2019 11:23 PM	Sign up for our Newsletter!	<a href="https://visitor.constantcontact.com/m...">https://visitor.constantcontact.com/m...</a>	 
9/27/2019 11:04 PM	Check out more resources on drugfreebusiness.com	<a href="https://www.drugfreebusiness.org/res...">https://www.drugfreebusiness.org/res...</a>	 
10/17/2019 10:16 AM	Welcome to the new RMW!	<a href="http://rmwtest.jsttest.com">rmwtest.jsttest.com</a>	 
10/24/2019 1:21 PM	New Resource	<a href="http://www.google.com">www.google.com</a>	 

Showing 1 to 5 of 5 entries. Previous  Next

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## 3. Test Results

The Test Results dashboard can be accessed by Users with RMW permissions and/or WebGod permissions, and is intended for filtering, sorting, and viewing Test Results.

### Test Results Search

On successful login, a User will automatically be directed to the Test Results Search page. The Test Results Search page will automatically load the last seven days of available results – that is, the application will identify the most recent Test Result, and show any results in the week previous.

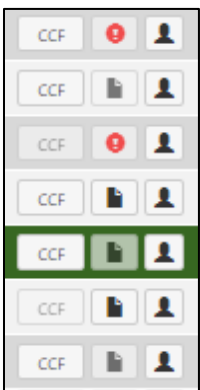
The Search page also provides a variety of filter criteria to narrow the search results.

### Search Criteria

- **Company/Contractor:** Provides an auto-completing list of Client Programs available to the logged in User. Selecting a Company/Contractor will filter grid results to show only Results for the selected Client Program.
- **Worker Info Contains:** Searches User First Name, User Last Name, User SSN, and User Employee ID for the entered value.
- **MRO Reason:** Filters results on the column "MRO Reason" to show only matching records.
- **Group:** Provides an auto-completing list of Groups available to the logged in User. Selecting a Group will filter grid results to show only Results for the selected Group.
- **Test Type:** Filters results on the column "Test Type" to show only matching records.
- **Report Result:** Filters results on the column "Result" to show only matching records.
- **Collected Date From/To:** Filters search results to show only records with Collected Date between the selected date values.
- **MRO Released From/To:** Filters search results to show only records with MRO Released Date between the selected date values.

### Actions

- **Print Letters:** This Action generates the Result Letters for all available search results. The PDF will display in an anew browser tab with options to print or download.
- **Print Results:** This Action generates a PDF render of the selected results. The PDF will display in a new browser tab with options to print or download.
- **Export Results:** This Action generates an Excel spreadsheet for download, with detailed information on Test Result records.



### Grid Actions

- **CCF:** This Action opens the Custody & Control Form in a new browser window or tab with options to print or download. If no CCF is currently available for a given Test Result record, the Action will be disabled.
- **View Result Letter:** This Action opens the Test Result Letter in a new browser window or tab with options to print or download. If no Letter is currently available for a given Test Result record, the Action will be disabled. When the Test Result is positive (or negative dilute), a red Action Required icon will show to remind the DER.
- **Go to Worker:** This Action opens the Worker Detail page. See **Part 5: Roster Management**.

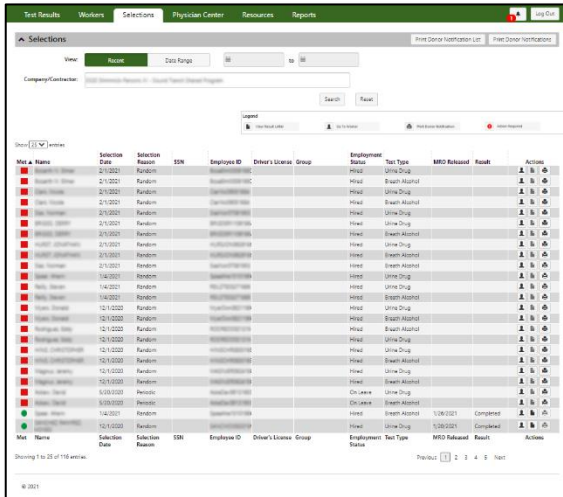




# 4. Selections

The Selections dashboard is accessible by Users with RMW permissions and/or WebGod permissions, and is intended for filtering, sorting, and viewing Met and Unmet Selections.

## Selections Search



A logged in User with the appropriate permissions can access the Selections screen by choosing the “Selections” option in the top-level navigation menu. The application assesses a User’s Affiliations, and if an Affiliation is found with a Program that supports Selections, the Selections menu option will show. Otherwise, the menu option will be hidden, and the page will be inaccessible to the User.

On page load, the Selections screen will show Met and Unmet Selections, with Unmet Selections sorted to the top. By default, the page will load with Selections that were created within the last calendar year (“Recent”) showing. To view more than the last year worth of data, select “Date Range” and choose the expanded Date Range. On Search, the grid will be filtered to show Selections with a Selection Date within the selected date range. On page load, the application will also default the logged in User’s last choice for

Company/Contractor. To override this choice, the logged in User can begin typing another Company/Contractor Name in the Company/Contractor field and choose a new option. In the example, the selected Company/Contractor has several Unmet Selections that should be resolved. Once completed, the Met indicator will turn green.

### Actions

- **View:** Changing the View from “Recent” to “Date Range” will open the date range fields for editing. The User can then select a custom range of Selection Dates to show in the grid results. The application will show an error if the “to” date is before the “from” date. Please note that changes to the grid results will not be reflected until the User selects the “Search” Action.
- **Company/Contractor:** This field will default to the last selected Company/Contractor for the logged in User. To change the Company/Contractor, begin typing and the field will autocomplete with results that match the input string. Select the desired Company/Contractor, then select the “Search” Action to show search results. A Company/Contractor must be selected to show search results.
- **Search:** When selected, the grid of search results will refresh to show results matching the selected search and filter criteria.
- **Reset:** When selected, the filter criteria and grid results will reset to their default state.
- **Print Donor Notification List:** When selected, this button will open a new tab with a PDF reporting on the Unmet Selections shown in the search results.
- **Print Donor Notifications:** When selected, this button will open a new tab with a PDF of Donor Notifications for each Unmet Selection shown in the search results.

### Grid Actions

- **Go to Worker:** When selected, this Action will go to the Worker Detail page for the Worker related to the current Selection.
- **View Result Letter:** When selected, this Action will open a new tab with a PDF of the Result Letter associated with the Test that met the current Selection. Please note that the Result Letter is not available for Unmet Selections, and there may be a delay between when the Result Letter is received and when the View Result Letter Action is enabled.
- **Print Donor Notification:** When selected, this Action will open a new tab with a PDF of the Donor Notification.



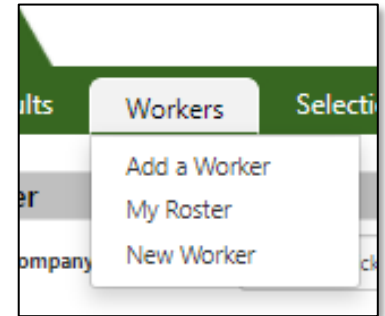
## 5. Workers Menu

Workers menu options are conditionally accessible to most Users depending on their permissions and Affiliations. The Workers menu is intended to be for viewing, editing, and managing a Company/Contractor Roster.

### Add a Worker

The Add a Worker Menu option is shown when the logged in User has an Affiliation with a Shared Program. On page load, the application will not automatically show grid results. The logged in User may select a new Company/Contractor or keep the last used Company/Contractor and select Search to show grid results.

The Worker Info contains field can be used to further filter the search criteria by searching in Worker Name, SSN, Driver's License, or Employee ID.



### Actions

- **Search:** When selected, the grid of search results will refresh to show results matching the selected search and filter criteria.
- **Reset:** When selected, the filter criteria and grid results will reset to their default state.

### Grid Actions

- **Hire:** When selected, this Action will drop the current Worker from their current Roster and add them to your Roster.

### My Roster

My Roster shows a list of Workers currently associated with the selected Company/Contractor. The Worker Info contains field can be used to further filter the search criteria by searching in Worker Name, SSN, Driver's License, or Employee ID.

### Actions

- **Export Results:** This Action generates an Excel spreadsheet for download with detailed information on Worker records.
- **Search:** When selected, the grid of search results will refresh to show results matching the selected search and filter criteria.
- **Reset:** When selected, the filter criteria and grid results will reset to their default state.

### Grid Actions

- **Go to Worker:** This Action opens the Worker Detail page for the current Worker.

### New Worker

This screen and menu option is only available to Users with an Affiliation to a non-Shared Program. In addition, dropdown options for Company/Contractor are restricted to only non-Shared Programs.

### Actions

- **Save:** Saves the new Worker record to the selected Roster.
- **Cancel:** Returns to calling form without saving changes.



## Worker Detail

This screen is accessible from multiple parts of the application and allows users with the appropriate permissions to view and edit Worker details including Name, Email, Phone, SSN, Company/Contractor, Driver's License, Group, Employee ID, and/or Employment Status. This screen also shows extended details on the current Worker's history, which may conditionally include Test Result History, Roster History, and/or a Worker Status Log.

### Actions:

- **Edit:** When selected, this Action will open the Worker Detail page for editing. Please note that not all fields are editable. See New Worker for a list of editable fields.
- **Done:** When selected, this Action will close the Worker Detail page and return to the last page you were on.
- **Collapse All/Expand All:** This button changes from Expand All to Collapse All depending on the state of the Test Result History, Selection History, Roster History, and Worker Status Log subsections. When it's in the Collapse All state and is selected, all open subsections will be closed. When it's in the Expand All state and is selected, all closed subsections will be opened.

## Test Result History (Worker Detail)

Test Result History is shown for all Programs and shows a running log in date order of Tests associated with the current Worker and Company/Contractor. In a Shared Selection Program, this grid will include Test Results from other Contractors. However, to protect the privacy of Workers, this is not the case in other Shared Programs.

### Grid Actions:

- **CCF:** This Action opens the Custody & Control Form in a new browser window or tab with options to print or download. If no CCF is currently available for a given Test Result record, the Action will be disabled.
- **View Result Letter:** When selected, this Action will open a new tab with a PDF of the Result Letter associated with the Test that met the current Selection. Please note that the Result Letter is not available for Unmet Selections, and there may be a delay between when the Result Letter is received and when the View Result Letter Action is enabled.

## Selection History (Worker Detail)

This grid is shown only for Programs that support Random or other Selections. This grid will show a history of Met and Unmet Selections for the current Worker, with a colored indicator that clearly shows which status the Selection is in.

### Grid Actions:

- **View Result Letter:** When selected, this Action will open a new tab with a PDF of the Result Letter associated with the Test that met the current Selection. Please note that the Result Letter is not available for Unmet Selections, and there may be a delay between when the Result Letter is received and when the View Result Letter Action is enabled.
- **Print Donor Notification:** When selected, this Action will open a new tab with a PDF of the Donor Notification.

## Roster History (Worker Detail)

This section shows a log of Hire, Terminate, or similar events in the current Worker's history. To protect Workers' privacy, this grid only shows results from other Company/Contractors when the Worker is in a Shared Selection program.

## Worker Status Log (Worker Detail)

This section is only shown when the current Worker is in a Shared Selection Program, and it shows a running log of updates to the current Worker's "Sound Transit Worker Status", used specially by Shared Selection Programs. The current Worker Status will be highlighted in the appropriate color.



## 6. Reports

The Reports Menu is accessible from the top navigation menu anywhere on the website and features a conditionally populated drop-down list of Report options. The options are detailed below.

### Donor Notification Report

The Donor Notification Report generates Donor Notifications for a selected Program with a Selection Date within a User-defined range. Please Note a Company/Contractor must be selected, and either a Date To or Date From must be Selected, to view results. The report output includes such information as Random Pool, Employer, Group, Donor Name, Donor SSN, Driver's License, Employee ID, and the Selection Date.

### DOT MIS Report

The DOT MIS Report is an informational matrix generated to assist DERs with filling out the DOT's required annual auditing forms. This Report uses backend data grouping that is specific to DOT programs, and to that end the selections screen and ability to run this report is restricted to Federal Programs.

### Test Result Summary Report

The Test Result Summary Report is effectively a clone of the DOT MIS Report, but with the significant difference that the logic for grouping Substances has been expanded to provide a more detailed view of non-Federal Programs.

### Roster History Report

The Roster History Report generates a matrix of Worker activity in a selected Company/Contractor and calendar year. The matrix provides detailed data and, at the bottom, summary data that assists in auditing and verifying Random Selections.

<b>Total Workers in Random Pool</b>	340	309	309	309
<b>Average Workers per Quarter</b>	320	309	309	309

<b>Tests Needed</b>		
<b>Drug Random Selection Rate: 30% = 94 Drug</b>		1267 <b>Total Workers in Random Pool</b> 312 <b>Average Annual Workers</b>
<b>Alcohol Random Selection Rate: 30% = 94 Alcohol</b>		