Epicenter Sponsor Handbook

OFFICE OF COMMUNITY SCHOOLS

MARCH 2018

Ohio | Department of Education

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Accessing Epicenter

Accessing Epicenter – User Invitation

To access Epicenter, you must be invited by the Epicenter administrator who works in the Ohio Department of Education's Office of Community Schools. To have a person added as an Epicenter User, the current Sponsor user must complete the Epicenter Security Request Form and submit it under the Epicenter Security Request Form submission type in Document Center. The form is in Epicenter as a resource file in the Epicenter Security Request Form submission type. The new user will receive an email invitation from noreply@epicenternow.org once the user's account has been set up in Epicenter.

To set up an account:

1. Select the link contained within the email.

2. Set up a user name and password.

3. The **My Profile** page will open.

4. Click the **Update** button at the bottom of the page to load the **Contact Set up** page.
   a. Enter the profile information (Name, Address, Phone, etc.).
      i. Select a preferred phone number.

   b. (Optional) Add a picture by clicking the **Change** button in the top right.
      i. Select the picture from your computer.
      ii. The picture can be a GIF, JPG or PNG but must be less than 100KB.

   c. In the **Task Notification Settings** section, select the preferences for receiving task emails. Note: Make sure emails from @epicenternow.org are not blocked by firewalls or email spam filters.
   d. Click **Save** and it will go back to the profile page.

5. Select either the Department logo at the top of the page or the **Home >** breadcrumb (see picture below) to access the Epicenter homepage.
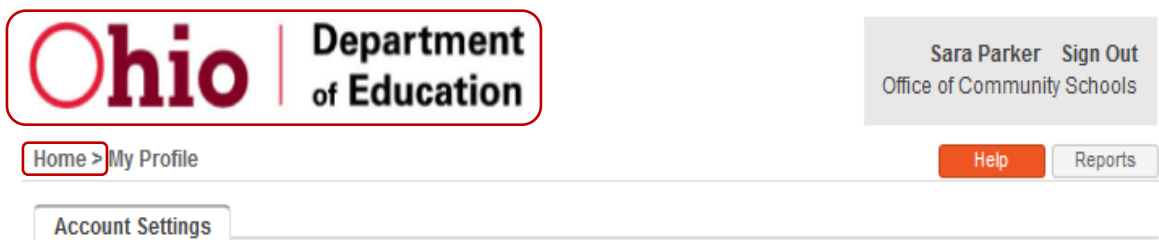
Accessing Epicenter – After Login is Created

To access Epicenter after you have created your login and signed out:

1. Open your internet browser and navigate to https://my.epicenternow.org.
   a. Do not include "www" at the beginning of the address.

   b. We recommend creating a shortcut on your computer desktop or save the URL as a favorite/bookmark within your internet browser.

2. Enter the username and password to log in.

Forgotten password:

1. Select the I forgot my password link on the Epicenter login page.

2. Enter your username or login email address.

3. Click **Submit.**

4. You will receive an email from noreply@epicenternow.org with the subject line **Epicenter Password Reset**.

5. Follow the instructions in the email to reset your password.

6. If you have trouble resetting your password, please contact the Epicenter administrator, Sara Parker, at sara.parker@education.ohio.gov or (614) 387-6037.

Home Page

Tasks

The **Tasks** area will show information regarding the number of tasks in your queue. You can open your tasks queue by selecting any of the counts listed. Use the drop-down menus to filter the tasks by **Classifications** or use the **Other Options** menu to display tasks that have been completed within the past two weeks. Epicenter also sends out a New Tasks email anytime you have a new task added to your queue. In addition, if you have a compliance requirement task that has a due date or any pending approval tasks, you will receive a weekly reminder email on Mondays, starting 14 days before the requirement is due.

Entity Counts

Below your **Tasks** area, if you have access to more than one school, you will see counts listed for the number of schools and/or annexes. You can select these areas to bring you to the corresponding center. These counts are based on the number of schools/annexes and their classifications.

My Profile

From the **My Profile** button found on the home page, you can update/change your contact information, photo, email address, password, login email address and set up two-step verification.

If you are changing your login email address or password, you will be required to enter your current password.

To change your contact information or photo, select the **Update** button located at the bottom of the **Contact Information** section. You may add any information in this part that you like.

You also can select the frequency of your **Task Notifications** under the **Task Notification Settings** at the bottom of your profile.
1. To Disable email notifications, select **Disable** from the drop-down selection under **Task Notification Settings**. It automatically defaults to Enabled.
2. To select the frequency, select **Disable**, **Nightly** or **Immediate** under the **Task Notification Settings** drop-down selection.

Help

The **Help** button provides access to articles, handbooks and training videos. If you are not able to find the answer to your support or technical question by using the **Help** button, please contact the Epicenter administrator, Sara Parker, at sara.parker@education.ohio.gov or (614) 387-6037.

Centers

As a sponsor, you will have access to the Document Center, School Center and Compliance Center. These "centers" can be accessed from the Epicenter home page.

- 🏛 SCHOOL CENTER
- 📄 DOCUMENT CENTER
- ☑ COMPLIANCE CENTER

Reports

The **Reports** button is available on most pages within Epicenter. This will open a new tab and load the **Reports** page. Once selected, you will see a menu. Reports will show information from:

- Compliance Requirements;
- Schools and Management Organizations;
- Submissions.

For each report, a brief description is listed based on what the report displays. To view a report:

1. Expand a section by clicking on its row (example: **+Compliance Requirements**);
2. Select the *open* link next to the report.

Within most reports, you can customize what information is displayed. You also can search within the report or export all the reports by clicking the 🖫▾ button and selecting the format. Internet Explorer users have added **Print** and **Find** features. If you are not using Internet Explorer and would like to Print the report, complete the following steps:

1. Export the report;
2. Open the exported file;
3. Print the file from the application in which it opens.

When you are finished, return to your previous tab, which should still be where you were when you clicked **Reports**.

Signing Out

To sign out of Epicenter, select the **Sign Out** link located in the upper right-hand corner of the page.

School Center

School Center allows users to view all information pertaining to their schools. The following information should be used when viewing information within **School Center**. If any information is incorrect or missing, please contact the Epicenter administrator, Sara Parker, at sara.parker@education.ohio.gov or (614) 387-6037.

On the home page, select **School Center**, this will take you to the **School List**.
1. Click on the school/annex that you would like to view.

Overview Tab

On the **Overview** tab, you can view the following information relating to the school/annex that you choose.

1. Classifications;
2. Physical Address;
3. County;
4. Phone Number;
5. Fax Number (if applicable);
6. Grades Served;
7. IRN;
8. Location Map.

To view any changes that have been made to the **Overview tab for the school/annex:**
1. Click on the **Change History** link.

   a. This will take you to the **Change History** page. You will be able to see:

   i. The old information;
   ii. The new information;
   iii. Who made the change;
   iv. The date and time the change was made.

Operations Tab

On the **Operations** tab, you can view the following information relating to the school/annex that you choose.

1. Mailing Address;
2. IRN;
3. Year Opened;
4. Contract Effective Date;
5. Contract Expiration Date;
6. Sponsor;
7. Sponsor IRN;
8. Resident District;
9. Management Company (if applicable);
10. Management Company IRN (if applicable).

Submissions Tab

The **Submissions** tab allows you to search for submissions from this school.
1. Select the submission type you are searching for in the "Submission Type" field.
   a. This field autocompletes. Type at least one full word in the submission type and options will begin to appear. Refine this list by typing more words.

   b. Click the desired submission type.

2. (Optional) Select the "Current and Complete Submissions Only" check box. This will refine your search to only submissions that are the most recently submitted and complete (status is not "Pending Review" or "Pending Approval").

3. When your settings are correct, click **Search**.

For a more refined search, click the **Advanced Search** link.

In the **Key Submissions** section below the search option, you will find the most recently uploaded submissions that are flagged as "key" and are not awaiting review and/or approval. Click on the row of a submission to open its **Submission Details** page.

Document Center

Document Center allows users to search for all submissions that are located in Epicenter. Users also can upload submissions (non-compliance) to Epicenter via the **Document Center**.

Using the Simple Search

Use the following steps to run a quick, simple search for any document.

On the home page, select **Document Center.**

3. (Optional) Limit the search to only one school by typing a school in the "Entity" field.
   a. This field autocompletes. As you type, schools will be displayed.

   b. Refine this list by typing further.

   c. Click on your chosen school.

2. Select the submission type that you wish to search in the "Submission Type" field.
   a. This field autocompletes. Type at least one full word in your desired submission type and options will begin to appear.

   b. Refine this list by typing more words.

   c. Click on your desired submission type.

3. (Optional) Select the "Current and Complete Submissions Only" check box. This will refine your search to only submissions that are the most recently submitted and complete (status is not "Pending Review" or "Pending Approval").

4. When your settings are correct, click **Search**.

5. This loads the **Search Results** page.
   a. To download a file, click on **the file's link**.

   b. To view the details of a submission, click on its row.

   c. To download several files at once:
      i. Select the check box to the left of the school name of each submission for the files you wish to download.

         1. To select all submissions, select the check box in the gray header next to **Entity** at the top of the page.

      ii. Click the **Download Selected Files** button located at the bottom of the page.

      iii. This will download a ZIP folder that contains all the selected files.

         1. Each file will have its school name appended to the end of the file name.

Using the Advanced Search

For more search options, use the Advanced Search in the following steps:

On the home page, select **Document Center,** click **Advanced Search.**
1. In the **Advanced Search** wizard, select the school or schools you want to include in the search.
   a. (Optional) You can select the **"Display Deactivated Entities"** check box (located at the bottom of the page) to include deactivated schools in your search.

   b. To select all schools, select the **School** group.

   c. To select individual schools, expand the **School** group by clicking on the plus sign next to the school group.

   d. The **Entities** step is the only required step in the Advanced Search.

2. If you want to further refine your search, move to the next step in the search by clicking **Next.** Otherwise, click **Search Now** to complete the search. The additional search options are:
   a. **Content:**
      i. Name (Submission type name or filename);
      ii. Original Name (originally uploaded filename);
      iii. Contains the words:

   b. **Submission Types:**
      i. Limit the search to only a certain submission type or several submission types;
      ii. (Optional): Include deactivated submission types by clicking on the **"Display Deactivated Submission Types"** check box.

   c. **Timeframe:**
      i. Search for dates on any submission tags within the selected submission types;
      ii. To include files with no date tags, click the **"Select files and data submissions which do not have date specifications"** check box.

   d. **Submitted Date and Status:**
      i. Limit the search to a certain time frame during which the submission was uploaded.

      ii. Also search for different Submission Statuses:

         1. Current and Complete Submission Only check box. This will refine your search to only submissions that are the most recently submitted and complete (status is not "Pending Review" or "Pending Approval");

         2. Review Pending;

         3. Approval Pending;

         4. Approved;

         5. "Returned." Note: Submissions with this status are not returned unless this check box is selected.

   e. **Sort Order:**
      ii. Sort your search results by any of the following categories:

         1. Entity Name;   3. Submission Type Name; 5. Submitted Time;
         2. Entity Type;   4. Status;   6. Timeframe Date.

      iii. Define how many results per page you would like to see.

         1. 20;   2. 50;   3. 100.

3. After clicking **Search Now**, you will be taken to the **Search Results** page.
   a. To download a file, click on the file's link.

   b. To view the details of a submission, click on its row.

   c. To refine your search, click **Modify Search.**

   d. To reset your criteria and begin a new search, click **New Search.**

   e. To download several files at once:
      1. Select the check box to the left of the school name of each submission for the files you wish to download.

      2. To select all submissions, select the check box in the gray header next to **Entity** at the top of the page.

      3. Click the **Download Selected Files** button located at the bottom of the page.

         a. This will download a ZIP folder that contains all the selected files.

         b. Each file will have its school name appended to the end of the file name.

Using the Key Submissions Search

You can view the most recent submitted key submissions that are not awaiting review and/or approval by selecting Key Submission… link. This search returns results from all schools.
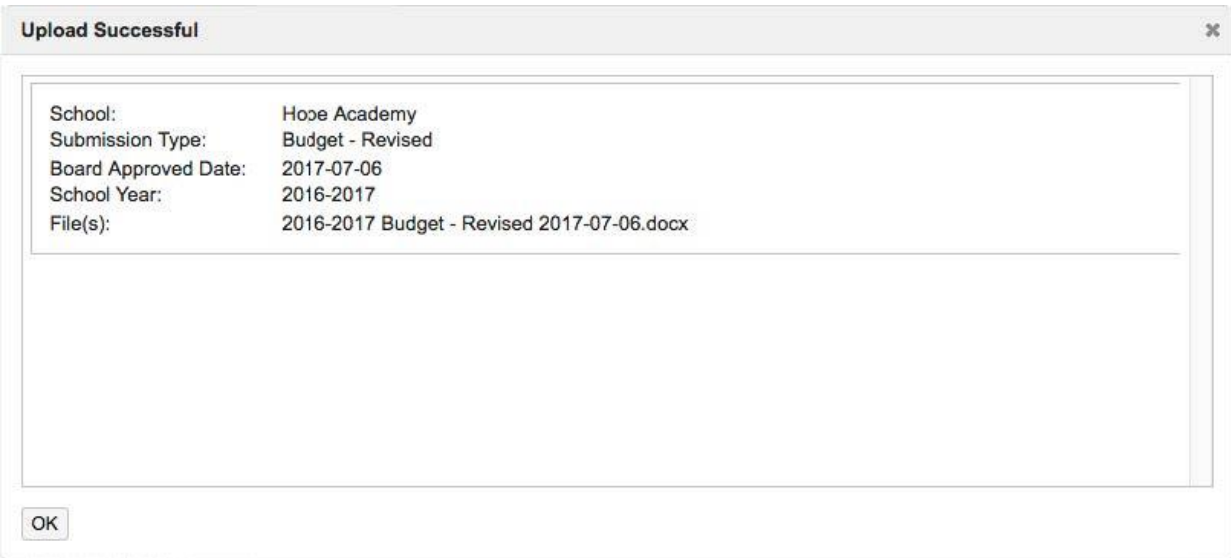
Uploading Submissions

The **Upload Submission** button located in **Document Center** can be used to upload any non-compliance submission to Epicenter. Complete the following steps to upload a submission.

On the home page, select **Document Center**, click **Upload Submission**.
1. On the **Submission Upload** page, in the "Entity Type" drop-down menu, select the school whose document you will be uploading.

2. In the "Submission Type" drop-down menu, select the type of submission that you will be uploading.

3. Click **Select Entity** to define the school whose document you will be uploading.

4. Select the name of the non-compliance submission type you wish to upload.

5. Fill in all the appropriate submission details.
   a. Submission Tags;

   b. Narrative;

   c. File Upload or Certification of Completion checkbox;

   d. Message to Reviewer/Approver, etc.

6. Click **Submit.**

   You should receive an **Upload Submission** pop-up window to confirm your submission.

Using the Reuse Previous File…in Document Center

If you want to use a previously uploaded file for a non-compliance item, please follow these instructions.

From the Epicenter home page, click **Document Center**
1. Click on **Upload Submission** at the bottom of the page.
2. Select School for **Entity** type.
3. Select the submission type you want to upload a previous file for.
4. Select the sponsor/school that you are uploading the document for.
5. The **Submission Upload** page will come up.
6. Click **Previously Uploaded File…** (the Previously Uploaded Files box will pop up).
7. You can click on the file(s) to view it before you submit to make sure it is correct.
8. Click the check box next to the file, then click **OK.**
9. Write any notes to the Reviewer (if needed).
10. Click **Submit.**

Compliance Center

Compliance Center is used to track and access compliance requirements. When first coming into Compliance Center, you are brought to the interactive dashboard and the **Statistics** tab. The remaining tabs, which include **Summary**, **Detail**, **Calendar and Status**, allow you to access the compliance requirements.

Using the Sort Filters

Each tab in Compliance Center has a set of filters. They are used to narrow the results that are displayed on that tab. Below is information regarding the use of the search filters in general.

1. The **Numbers** on certain filters display a count of how many items are selected in that filter.

2. For each search filter, you will need to select **Apply** to apply you filters settings or **Cancel** to return to the previous or default selection.

3. Once a filter is changed from the default, its white background will turn gray. It will remain gray until it is changed back to the default selection for that tab.

4. To reset all search filter drop down selections back to their default settings, select the search funnel icon (as pictured below).

5. Changes made to the search filters on the **Statistics** tab will not carry over to the other tabs and vice versa. Any changes made to the search filters within the **Summary**, **Detail**, **Calendar** and **Status** tabs, however, will carry over between those tabs.
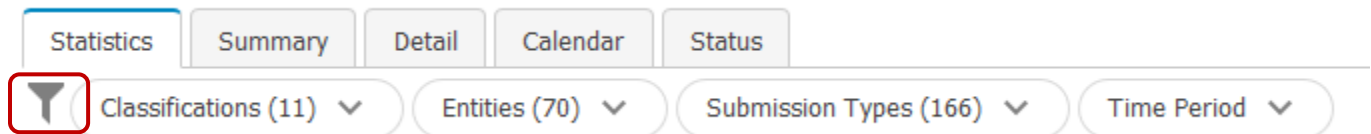
Filter Descriptions

1. **Classifications**
   Allows you to limit what is displayed in your list according to the classification of the entities assigned to the requirements. By default, all **Classifications** will be selected.

   a. Once you apply any changes, the **Entities** filter will update to only selecting those entities for the Classifications selected.

   b. In addition, the **Submission Types** filter will update to only selecting those submission types for the entity type(s) selected.

2. **Entities**
   Allows you to filter by entity(s) or school(s). By default, all entities will be selected. Within the Entities filter, you can:

   a. **Select all entities** by selecting the topmost check box or clicking the All link on the bottom right.

   b. **Deselect all entities** by deselecting the topmost check box or clicking the None link on the bottom right.

   c. **Select individual entities** by deselecting all entities, then expanding (+) the **School** parent group. Then, select the entities you want to view.

d. **Include deactivated entities** by selecting the **Display Deactivated Entities** check box at the bottom of the window.

3. **Submission Type**

Allows you to choose which kinds of requirements will be displayed. By default, all submission types are selected. Within the Submission Types filter, select all, deselect all, select individual, and include deactivated the same way as Entities (above).

4. **Time Period**

The Statistics tab will default to displaying stats for all requirements due in the current school year, the Summary and Detail tabs will default to displaying requirements due in the next 30 days, as well as any that are Past Due. Within the Time Period filter, you can:

a. Choose whether the time period will be displayed by due dates or event dates.

b. Adjust the time period by entering specific From and Through dates.

   i. To quickly select an entire school year, select the **Data Range Selector** drop-down selection and choose a specific year.

c. If you would also like to see Past Due requirements from outside the date range, click the **Return past due outside of selected dates** check box.

5. **Sorting and Outputs**

Allows you to adjust the sorting rules and the number of rows per page. It has the following options:

a. **Scheduled**: All unsatisfied requirements

   i. **Not Due Yet**: All unsatisfied requirements that are not past due.

   ii. **Past Due**: All unsatisfied requirements that are past due.

b. **Submitted**: all satisfied requirements

   i. **Complete**: All satisfied requirements that are pending review or approval.

   ii. **Review Pending**: All satisfied requirements that are pending review.

   iii. **Approval Pending**: All satisfied requirements that are pending review.

c. **On Time**

   i. All unsatisfied requirements due in the future.

   ii. All satisfied requirements submitted before their due dates.

d. **Late**

   i. All unsatisfied requirements due in the past.

   ii. All satisfied requirements submitted after their due dates.

e. **Accurate**: All satisfied requirements that have not been returned.

f. **Not Accurate**: All satisfied requirements that have been returned.

g. **Sort Options**: Allows you to determine the priority of your list's order.

h. **Rows per Page**: 20, 50, 100 results per page.

When all the checkboxes are selected, all requirements for the entities and time period entered will be returned.

6. **Other Options** (Only on the **Status** tab)
   Allows you to adjust the date range and the number of rows that will display per page.

   On All Filters: Select the **Apply** button to have your changes take effect.

   NOTE: The **Calendar** tab in Compliance Center will only display requirements scheduled 12 months in the past and 18 months into the future.

Statistics Tab

When you click on **Compliance Center**, Epicenter take you to the Compliance Statistics dashboard. It automatically defaults to the current school year (as shown in the picture below).
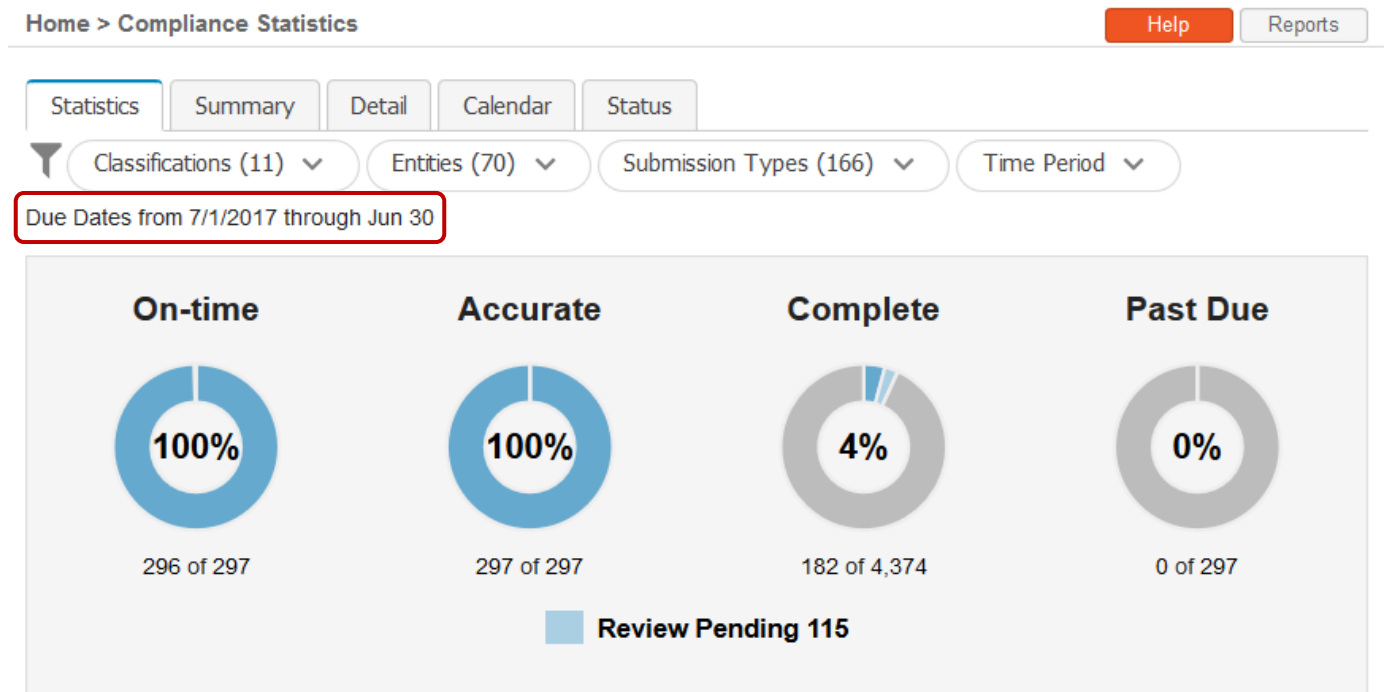

Below is an explanation of how each of the donut chart percentages displayed in the Compliance Center Statics dashboard are calculated. Selecting any sections of the donuts charts will bring you to the **Detail** tab, listing the requirements that correspond to the section you clicked

1. **On time**: The number of requirements Submitted on time divided by the number of requirements submitted on time, late and past due.

   a. The blue section of the donut chart represents the requirements that were submitted on time.

   b. The gray section represents the late requirements (both submitted late and past due requirements).

2. **Accurate**: The number of compliance submissions not returned divided by the number of compliance submissions not returned plus the number of compliance submissions rejected. If the same requirement is submitted three times because it was returned the first two times, it will count for one submitted but not returned and two returns (total = 33 percent accurate for those submissions.

   a. The blue section of the donut chart represents the requirements submitted that have not had any returns.

b. The gray section of the donut chart represents the requirements submitted that have had returns.

3. **Complete**: The number of requirements approved (or in an approved like status) divided by the number of requirements.

   a. The darker blue section of the donut chart represents the requirements that have been completed. Overall, they are considered complete because they have been submitted and have gone through the necessary review and approval verifications.

   b. The light blue section of the donut chart represents the requirements that are either pending review or pending approval. The counts for the number of Review Pending and/or Approval Pending will be listed under the donut charts.

   c. The gray section of the donut chart represents the requirements that have been scheduled and are not yet complete but not past due.

4. **Past Due:** The number of requirements past due divided by the number of requirements submitted plus past due.

   a. The blue section of the donut chart represents the requirements that are past due.

   b. The gray section of the donut chart represents the requirements that have been submitted plus the requirements that are past due.

Summary Tab

The **Summary** tab lists all the requirements that have been scheduled and/or completed for the current school year grouped by submission type. If you have more than 20 requirements listed (you will see this count on the upper right side under the sorting options), you can select **First**, **Previous**, **Next**, **Last** to navigate through the pages. You can adjust the Rows per Page option under Sorting and Output to see 20, 50 or 100 rows per page (see Using the Sort Filters).
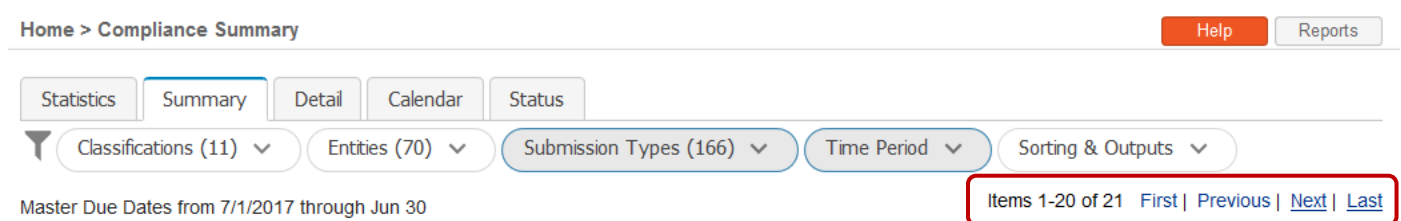
Detail Tab

The **Detail** tab lists all requirements that have been scheduled and/or completed for the current school year. These are sorted by submission type, but they are not grouped like the ones on the Summary tab. You can sort these by **Classification**, **Entities**, **Submission Type**, **Time Period, and Sorting and Output**.

If you have more than 20 requirements listed (you will see this count on the upper right side under the sorting options), you can select **First**, **Previous**, **Next**, **Last** to navigate through the pages. You can adjust the Rows per Page option under Sorting and Output to see 20, 50 or 100 rows per page.

Calendar Tab

The Calendar tab shows what requirements are due in a calendar format.

When you click on the **Community School Annual Budget** (or any of the scheduled requirements), it will populate a list of your schools.

1. If the school(s) are crossed out, that requirement has been completed.

2. If the school is not crossed out, click on the name of a school in the list. This will take you to the **Submission Upload** page where you can upload the submission to complete the requirement.

Submitting a Compliance Submission using the Task in the Queue

Compliance items can only be submitted through the **Tasks Queue** and the **Compliance** Center. You are no longer able to submit them through the Document Center. When uploading submissions, it is very important to review any **Description**, **Instructions** and **Resources** found on the **Submission Upload** page.
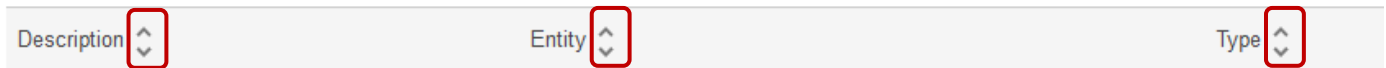
Open your **Tasks** by selecting your **Tasks Queue** found in the upper left corner of the Epicenter home page.

You can use the arrows (pictured below) to sort the tasks in your queue by **Description**, **Entity**, **Type**, **Notification** and **Due Date**. You also can filter tasks with the filter buttons (see Using the Sort Filters).

To complete a Compliance Requirement task listed in your Tasks Queue, please complete the following steps:

1. Click the row of the submission requirement you want to complete. This will bring you to that task's **Submission Upload** page.

2. The organization for which you are submitting the requirement will be listed at the top. Make sure you have opened the correct task. Review any Description, Resources and Instructions that have been provided.

3. Fill in any Submission Tags that are required to be entered. Required submission tags will have an asterisk (*).

4. Use either the **Upload New File…**button or the **Previously Uploaded File…**button and attach your file(s). If the requirement is a **Certification of Completion** type, select the appropriate check box. If the requirement includes a **Narrative,** you can either type in a response, upload a file or both.

5. Include any needed message to the reviewers/approvers.

6. Select **Submit.**

Your submission can now be viewed in Epicenter.

Submitting a Compliance Submission using Compliance Center

If the compliance requirement task is not in your Tasks Queue, you can access Compliance Center, select the requirement from the **Detail** or **Calendar** tabs, and complete it (if you have the appropriate permissions to complete the requirement). The following provides guidance on finding the requirement from each of these areas.

1. From the **Details** tab, you can select the requirement. This tab defaults to showing any requirements due in the next 30 days, as well as any that are past due.

   a. Sorting is defaulted to Requirement Title, then Due Date.

   b. You also can filter results with the filter buttons (see Using the Sort Filters).

2. From the **Calendar** tab, you can select the requirement. This tab defaults to the current month.

   a. This tab defaults to the current month, but you can use the arrows (pictured below) to progress to previous or future months.
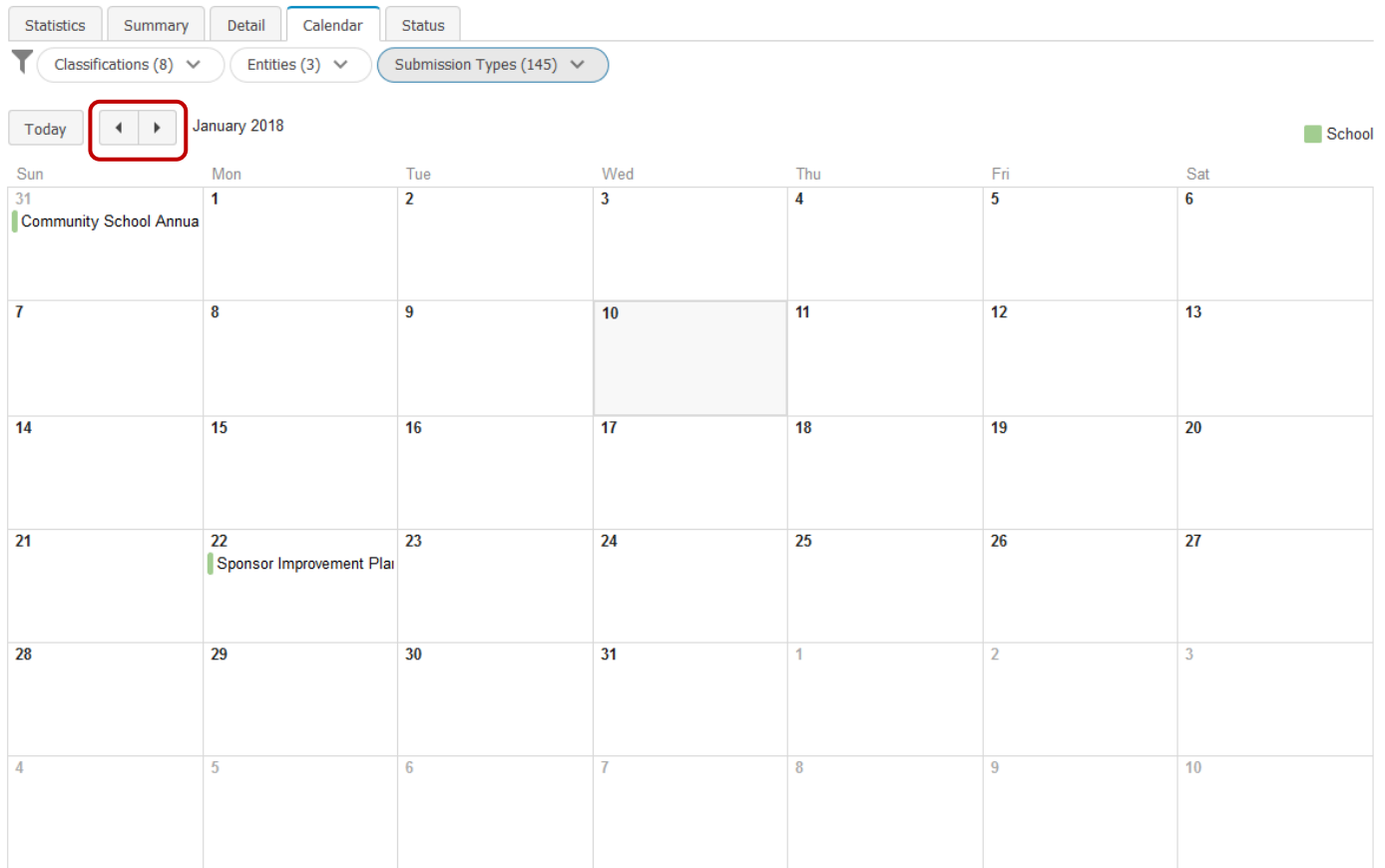
b. The calendar will only display 12 months of requirements in the past and 18 months of requirements into the future.

Using the Reuse Previous File…in Compliance Center

If you want to use a previously uploaded file for a compliance item, please follow these instructions.

From the Epicenter home page, click **Compliance Center.**

1. Click on the **Detail** tab.

2. Filter by **Entity** (the sponsor may not have to do this depending on how many schools it has).

3. Filter by **Time Period** (you can enter a date range or select the School Year from the drop-down selection.

4. Select the submission type you want to upload a previous file for.

5. Click anywhere on that line and it will pull up the **Submission Upload** page.

6. Click **Previously Uploaded File…** (the Previously Uploaded Files box will pop up).

7. You can click on the file(s) to view it before you submit to make sure it is correct.

8. Click the check box next to the file, then click **OK.**

9. Write any notes to the Reviewer (if needed).

10. Click **Submit.**

my.epicenternow.org

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