

# CAPRA Reviewer and Visitor Guide:

## *Reviewing Compliance Using PowerDMS*

This guide provides CAPRA Reviewers and Visitors with information to access agency PowerDMS sites, to navigate the assessment, toggle between the CAPRA Application and Review Portal, and to assess evidence of compliance.

*NOTE: Agencies must document their Narratives in the CAPRA portal. However, it is recommended they also attach their narratives to their PowerDMS assessment for your review along with their evidence of compliance. This will reduce the need to toggle between PowerDMS and the CAPRA portal.*

*NOTE: All official Visitor narrative of findings and compliance status (i.e., “Met” or “Not Met” as appropriate) are entered in the CAPRA Application and Review Portal. Any status set in PowerDMS is for the agency’s information.*

### **I. Getting Started**

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To conduct a CAPRA Assessment, you will need the following:

1. The CAPRA Reviewer / Visitor Unlock Key to the standards
2. The agency’s PowerDMS Site Key
3. The agency’s PowerDMS site Username and Password

To conduct a Mock Assessment, you will need the following:

1. The agency’s PowerDMS Site Key
2. The agency’s PowerDMS site Username and Password

#### **A. CAPRA Reviewer / Visitor Unlock Key (CAPRA Reviewers / Visitors Only)**

1. Once you are assigned to conduct a CAPRA Assessment with an agency using PowerDMS, contact CAPRA and ask for the CAPRA Reviewer / Visitor Unlock Key. You may also contact PowerDMS for assistance at [support@powerdms.com](mailto:support@powerdms.com) or 888-959-5158.

**Note:** *The Unlock Key protects the integrity of the assessment. This unlock key acts as a password to allow members of the CAPRA Review / Visitor team to change the status of the file. Agency personnel are not provided the Unlock Key!*

2. PowerDMS recommends keeping the Unlock Key in a place where it can be copied and pasted into the appropriate field within the agency’s assessment. Copy and pasting the Unlock Key will expedite setting statuses to the standards as you will not have to type it each time you log in.

3. If you have problems using the Unlock Key, contact PowerDMS at [support@powerdms.com](mailto:support@powerdms.com) or call 888-959-5158

## **B. Agency Site Key, Username, and Password**

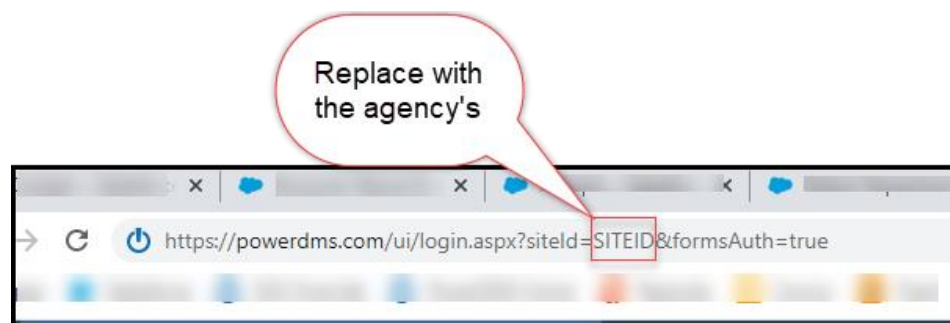
1. Contact the agency requesting the review and ensure you have been added to the assessment as *CAPRA Reviewer / Visitor* depending on the type of review you will be conducting.
2. Confirm the agency has added you to the assessment with the right to **OBSERVE** the Accreditation Manager role **and** the right to **PARTICIPATE** in the CAPRA Reviewer / Visitor role.
3. Request the agency's PowerDMS Site Key (see instructions above)
4. Request the Username and Password from the agency
5. Log into the agency's PowerDMS site to ensure your access.

**Note:** The first time you log in, you may be prompted to change your password. Change the password to something you can remember as you will use this password **each** time you log in.

## **C. Single Sign On**

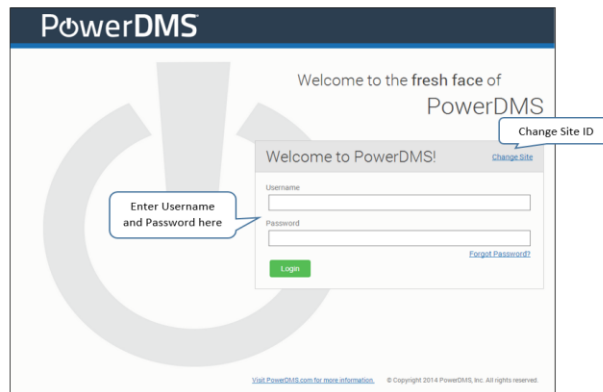
Some agencies use the single sign on (SSO) feature offered through PowerDMS. When you attempt to log into an agency site that uses SSO, you will be routed to the agency's network for login instead of PowerDMS. You will **not** be able to log in. In such instances, use the following link to bypass the SSO. You will need to replace *SITEID* portion of the URL address with the *SITE ID* you received from the agency.

1. Copy <https://powerdms.com/ui/login.aspx?siteId=SITEID&formsAuth=true> into your browser's address bar.
2. Replace "SITEID" with the agency's SITE ID (It will **not** appear in red font when you copy it into your browser's address bar).
3. Log in with the PowerDMS credentials provided by the agency.



## **D. Logging In**

1. Ensure the agency's information appears in the login window and enter the Username and Password provided by the facility (note: If you use PowerDMS within your own organization, this username and password will be different).
2. If the agency's name does not appear in the log in window, you will need to **change sites** and enter the agency's unique Site Key, then enter the username and password provided.



**TIP:** Log into PowerDMS in your web browser, then open another web browser tab and log into the CAPRA Application and Review Portal. This will allow you to toggle between the two applications without logging in and out repeatedly.

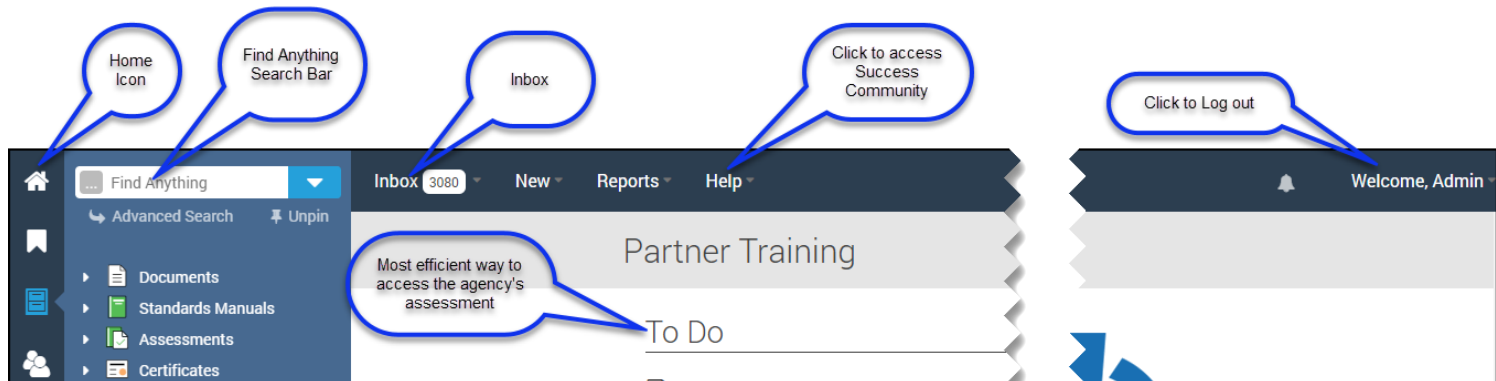
## II. General Site Orientation

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Every agency's PowerDMS site has the same basic features. Most agencies customize their PowerDMS site with their logos or branding, but all sites have a home icon, Find Anything search bar, Inbox, Help menu, To Do list, and a Welcome, NAME drop-down menu. These features are defined as follows:

1. Home Icon: Clicking this icon in the upper left corner of your screen returns you to the home page. This icon is always visible from any location within PowerDMS.
2. Find Anything Search Bar: Typing keywords and phrases in this search field displays content the user has access to within the Agency's PowerDMS site.
3. Inbox: Contains a list of all work the user is required to complete within PowerDMS. For assessments, this work is to "set status" to the standards upon review.
4. Help Menu: This drop-down menu gives you access to the PowerDMS Success Community where more information on conducting assessment can be found.
5. To Do List: The To Do list creates a priority of work items found in your inbox. This list has convenient links that will navigate you directly to the assessment.

6. Welcome, NAME menu: This drop-down menu is where you logout from the agency's site.



### III. Accessing Standards

The most efficient way to access the agency's evidence of compliance is to follow the hyperlink in the CAPRA Application and Review Portal. Agencies are advised to hyperlink each chapter of their PowerDMS assessment to the corresponding Chapter in the CAPRA portal.

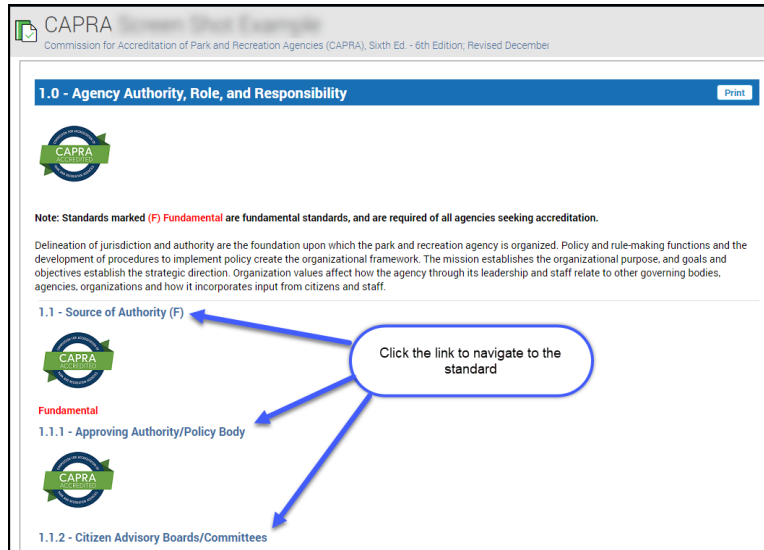
The hyperlink to the PowerDMS assessment is found when you *Open Link in New Window* at the bottom of the page under the "Additional Documents Link" section. At this time, hyperlinks to the Chapter Evidence section of the CAPRA portal are not supported.

The screenshot shows the 'Chapter Evidence' section. It includes a note: 'Please Note: The evidence of compliance section for each chapter is limited to a maximum of 20 uploads (files or weblinks)'. Below this is a table with two columns: 'Evidence' and 'Action'. The table contains one row with the following data:

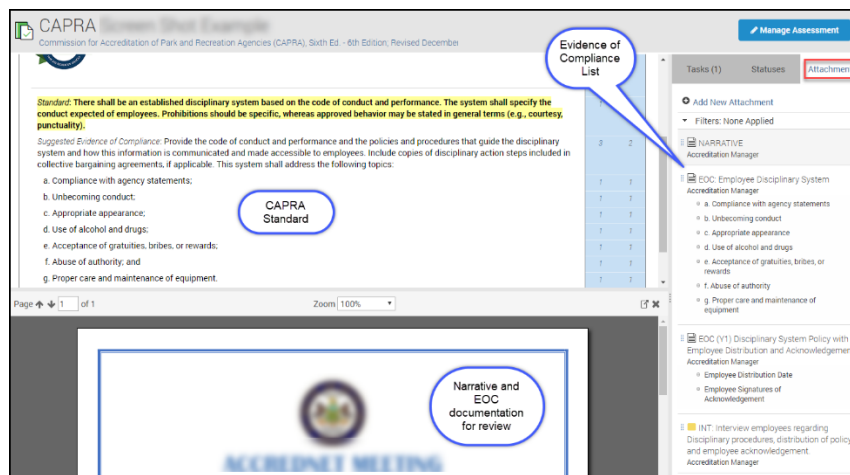
Evidence	Action
1.1 - The link to PowerDMS Standard 1.1 Link (URL)	Edit   Remove

Below the table is a 'View Evidence' button with a red 'X' over it. At the bottom of the section is an 'Add another Evidence' button. Below this is the 'Additional Documents Link' section, which includes a note: 'If you want to provide additional evidence please provide a link below to an external document management system'. Below this note is a text input field containing the URL 'bid=Proofs&nodeid=17421887'. Below the input field is a link labeled 'Open Link in New Window' with a green checkmark.

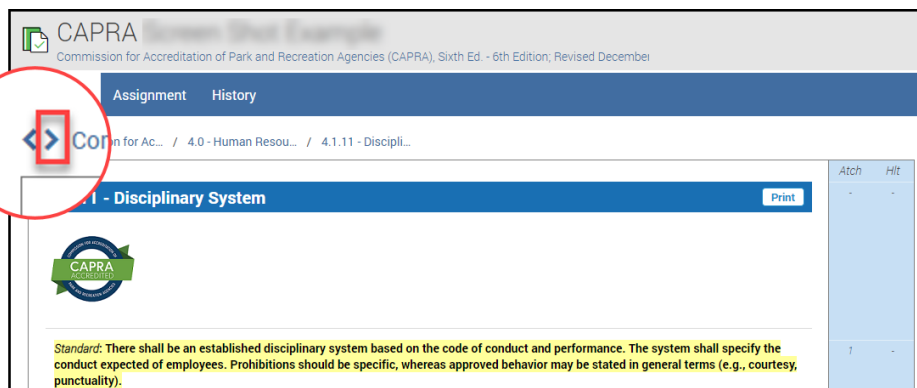
Following the link will open the agency's PowerDMS site and take you directly to the chapter within the assessment. **NOTE:** You must log into PowerDMS **prior** to following the link in the CAPRA portal. Once in the PowerDMS assessment, simply click on the hyperlink to the desired standard.



Click on the Attachment tab along the right side of the screen to review the narrative and evidence of compliance. *Remember: The narrative is also copied and pasted into the appropriate fields in the CAPRA portal.*

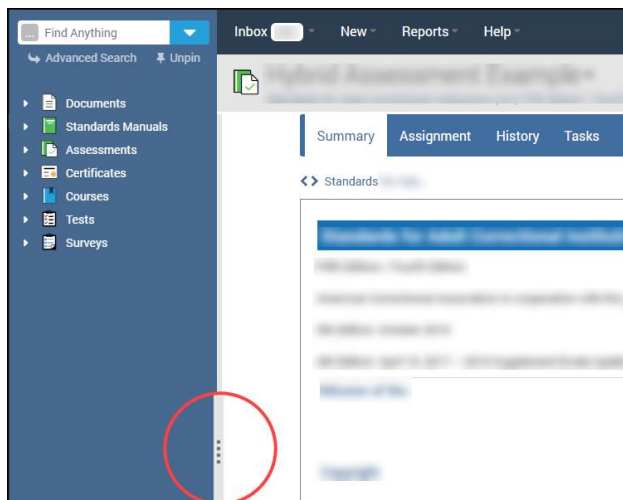


To advance to the next standard, click the forward arrow at the above the standard.



You may also navigate to the standards using the assessment's Table of Contents.

1. To access the Table of Contents, locate the four dots centered vertically along the left margin of the assessment.

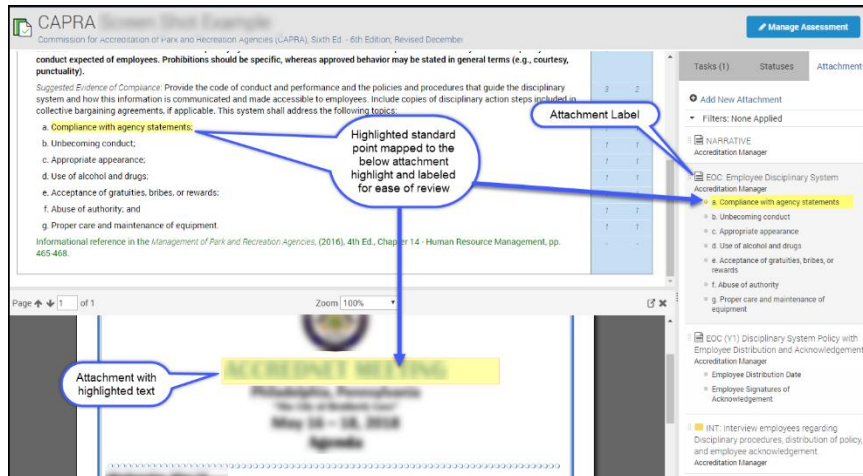


2. Click the dots to expand the Table of Contents.
3. Click on the chapter headings to access the standards.

#### IV. Reviewing Attachments

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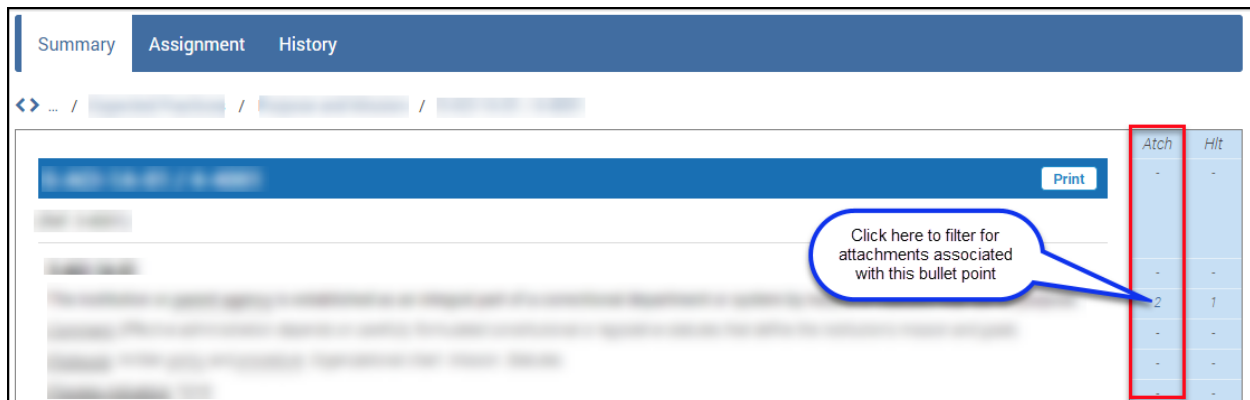
1. If you are a CAPRA Reviewer or Visitor, you will need to enter your Unlock Key **each** time you log in to the agency's PowerDMS site. Enter (or copy and paste) the Unlock Key in the field provided and click **UNLOCK**.
2. Select the **ATTACHMENTS** tab to review the items that are attached as proof of compliance to the standard.
3. Click on the attachment's name to view both the standard and the attachment that is used as proof of compliance. The labels beneath the attachment's name link to highlights in the proof of compliance. Click on these labels to quickly and easily determine the agency's compliance to the standard.



## V. Filtering Standards

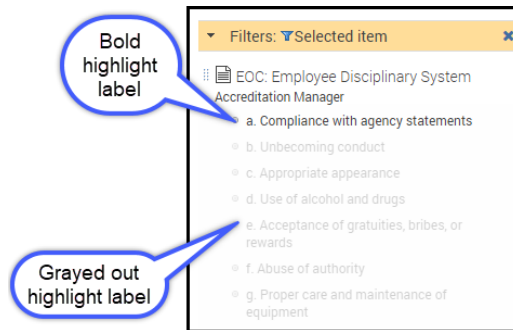
During your file review, you may review attachments and highlights associated with a single bullet at a time. If the agency's project manager mapped attachments and highlights to specific bulleted points on bulleted standards, PowerDMS makes examining bulleted standards quick and easy by allowing you to review each proof of compliance and all highlights specific to each bullet point one at a time

1. Select the number to the right of the standard you want to review under the "Atch" column. Only attachments mapped to the filtered bullet point will appear in the list of attachments on the right of your screen.



2. Click on the **bold highlight labels** to review compliance for that bullet point.

**Note:** When you filter for attachments, only attachments mapped to the bullet point will appear in the attachments list on the right of your screen. Highlights mapped to the bullet point will have **bold highlight labels**. Those highlights mapped to other bullet points will be grayed out.



## VI. Setting Statuses (Optional)

Setting status is how you authenticate the agency's compliance with each standard. Once you review attachments to the standard, you can set the status to indicate the agency's level of compliance.

*NOTE: All official Visitor narrative of findings and compliance status (i.e., "Met" or "Not Met" as appropriate) are entered in the CAPRA Application and Review Portal. Any status set in PowerDMS is for the agency's information.*

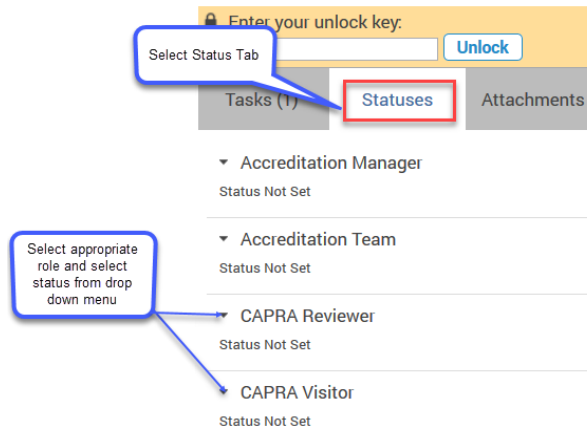
If you chose to set status, follow the steps below:

### A. Setting Status

1. Navigate to the **Status** tab of the Standard
2. Locate your role in the list
3. Select the appropriate Status from the drop-down menu
4. **DO NOT** enter an expiration date (the status will be date/time stamped when you set it).
5. Click **SAVE**

**NOTE:** You will not be able to set a status to the standard without entering your Unlock Key. Remember: The agency does not have access to the Unlock Key.





## V. Reports (Optional)

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Typically, the agency does not give CAPRA Reviewers or Visitors access to the PowerDMS Report feature. However, you can ask the agency's project manager to run a **Status Report for One Role** report specifically for the **CAPRA Reviewer** or **Visitor** role, if needed.

## VI. Help and Support

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The PowerDMS assessment tool can be used in many ways. Choose the method that works best for your team and be consistent.

The PowerDMS Service Desk Support can be reached by calling (888) 959-5158 or by e-mailing [support@powerdms.com](mailto:support@powerdms.com) Monday through Friday, from 8:00 a.m. to 5:00 p.m. Eastern time.

Don't get stuck or frustrated - reach out, we are happy to assist!

For more information, see [Conducting an Assessment in PowerDMS](#) for a video tutorial and the Article [Conducting a Mock and Final Assessment](#).