

# Illinois Association of Park Districts and Illinois Park Districts Association Evaluation Team Resource Guide:

## *Reviewing compliance using PowerDMS*

This guide provides Illinois Association of Park Districts (IAPD) and Illinois Park Districts Association (IPRA) Evaluation Team members with information to access agency PowerDMS sites, to navigate the assessment, and to assess compliance documentation.

### **I. Getting Started**

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To conduct an IAPD / IPRA Review you will need the following:

1. The Evaluation Team Unlock Key to the standards
2. The agency's PowerDMS Site Key
3. The agency's PowerDMS site Username and Password

#### **A. IAPD / IPRA Evaluation Team Unlock Key**

1. Once you are assigned to conduct an IAPD / IPRA Review with an agency using PowerDMS, contact PowerDMS and ask for the Evaluation Team Unlock Key. You may reach PowerDMS at [support@powerdms.com](mailto:support@powerdms.com) or 888-959-5158.

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

2. PowerDMS recommends keeping the Evaluation Team Unlock Key in a place where it can be copied and pasted into the appropriate field within the agency's PowerDMS site. 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 *Evaluation Team*.
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 Evaluation Team role.
3. Request the agency's PowerDMS Site Key (see instructions above)
4. Request the Username and Password from the agency

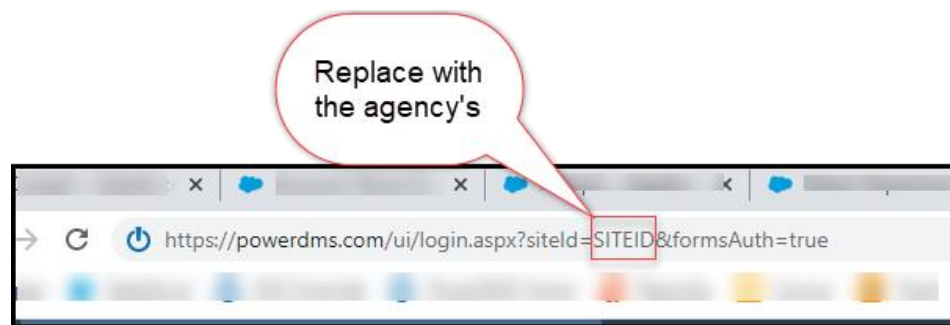
5. Log into the agency's PowerDMS site to ensure your access.

**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

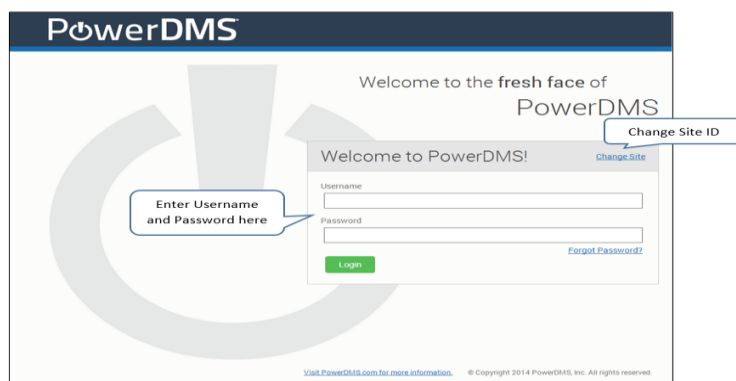
Some agencies use the single sign on (SSO) feature offered through PowerDMS. When you attempt to log into an agency site that uses SSO, you will be routed to the agency's network for login instead of PowerDMS. You will **not** be able to log in. In such instances, use the following link to bypass the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

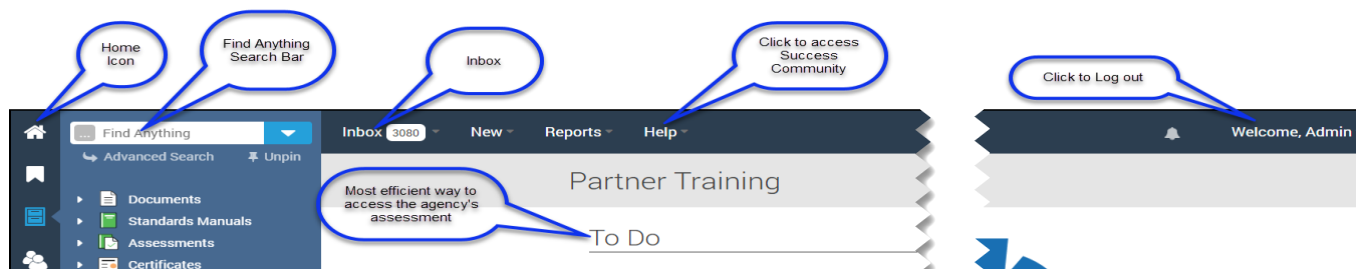
1. Ensure the agency's information appears in the login window and enter the Username and Password provided by the facility (note: If you use PowerDMS within your own organization, this username and password will be different).
2. If the agency's name does not appear in the log in window, you will need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



## II. General Site Orientation

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.

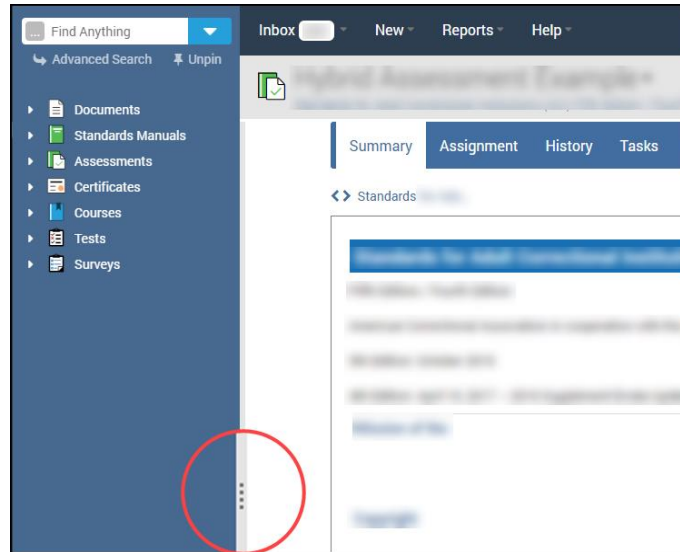


### III. Accessing Standards

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The most efficient way to access the assessment is to follow the link from the **TO DO** list on the PowerDMS homepage.

1. Once you are inside the assessment, navigate to the standard you want to review via the Table of Contents on the left pane. To access the Table of Contents, locate the four vertical dots along the left margin of the assessment. These dots are centered vertically along the left margin.



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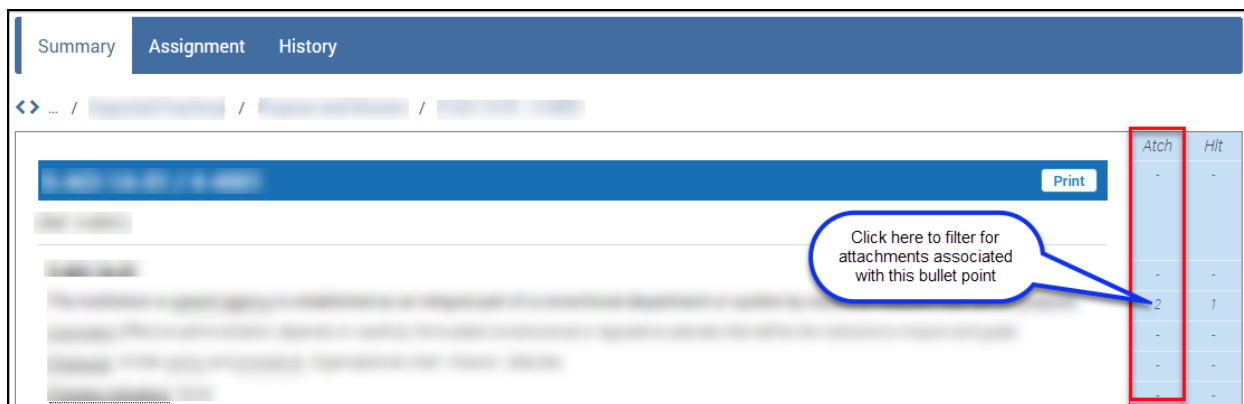
1. If you are an evaluation team member, you will need to enter your Unlock Key **each** time you log in to the agency's PowerDMS site. Enter (or copy and paste) the Unlock Key in the field provided and click **UNLOCK**.
2. Select the **ATTACHMENTS** tab to review the items that are attached as proof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

### V. Filtering Standards

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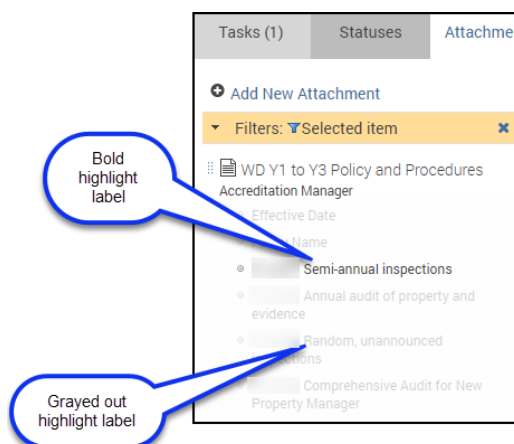
During your file review, you may review attachments and highlights associated with a single bullet at a time. If the agency's project manager mapped attachments and highlights to specific bulleted points on bulleted standards, PowerDMS makes examining bulleted standards quick and easy by allowing you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

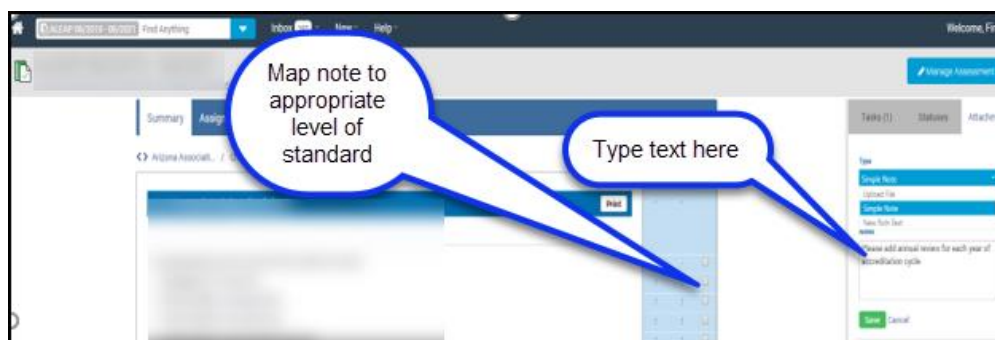
If you want to provide comments, need additional information from the agency, or determined a deficiency existed, you can add a Simple Note to the standard.

### ***Adding Simple Notes***

Simple Notes can act to document findings during the file review. These notes can be exported into a Word, Excel, or PDF document and saved for completing reports for the **Accrediting Organization**.

To add a Simple Note:

1. Navigate to the **Attachments** tab of the standard.
2. Select **Add New Attachment**
  - a. From the *Type* drop-down list, select **Simple Note**
  - b. Type your notes in the space provided.
  - c. Map the Simple Note to the appropriate level of the standard (or bullet point).
  - d. Click **SAVE** when you are finished.



Your added note will appear at the bottom of the list of attachments in the right pane (below the agency's attachments).

## **V. Reports**

Typically, the agency does not grant evaluation team members access to the PowerDMS Report feature. However, you can collect all Simple Notes added by evaluation team members into a single excel document. To collate evaluation team Simple Notes added, the evaluation team member can filter all of the assessment's attachments for SIMPLE NOTES by *Evaluation Team* role to generate a list of the Simple Notes (or findings) added during the file review.

To export Simple Notes:

1. Navigate to the root of the manual
2. Click on the **ATTACHMENTS** tab
3. Select the *SIMPLE NOTES* from the **Attachment Type** drop-down menu
4. Select *Evaluation Team* role from the **Added by Role** drop-down menu
5. Click the *Filter* button
6. Select the preferred file type icon for export (Excel, Word, PDF) in the upper right-hand corner of the table.

The screenshot shows the 'Attachments' tab in the PowerDMS interface. Annotations include:

- A red star next to the 'Filter' button.
- A callout bubble pointing to the 'Attachment Type' dropdown menu with the text 'Select "Simple Note"'. The dropdown is currently set to 'Simple Note'.
- A callout bubble pointing to the 'Added by Role' dropdown menu with the text 'Select Role'.
- A callout bubble pointing to the export icons (Excel, Word, PDF) in the top right corner of the table area with the text 'Select file type for export'.

The table below shows the search results:

	Standard	Notes	User	Role	Created	Status	PowerDMS Document	
<input type="checkbox"/>	View 10.1.1 Records Security	NEEDS REPAIRED: Not in Compliance Attach proof for substandard 10.1.1.1 for each year of the assessment cycle.	admin - admin	Accreditation Manager	2/19/2020			N/A

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## VI. IAPD / IPRA Score Sheet

## VII. Help and Support

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](#).

For information on how PowerDMS trains agencies to build assessments, you can access the [IAPD / IPRA User Resource Guide](#).