State Account Overview

The State Account is an administrative account designed to connect a network of programs that are supported by a lead agency often a state model implementation office or state government office funding several programs. The State Account has the ability to run reports and administer Site/Fund Codes with those programs that agree to the Data Sharing Agreement.

HOME PAGE

This a view of the home page when you log in. The home page defaults to the Reports Page.

• Click on **Setup** to view the other functions of this account.

Setup Report	s Support
🕞 Log Out	O Reports
	Ethnicity High Needs Resource Referral Exit Summary Affiliate Performance Report Performance Measures Report Visit Frequency MIECHV Form 2 Colorado MIECHV Form 1 (new) MIECHV Form 2 Illinois (new) MIECHV Cohort Child Summary
Converget @ 2017 Datak	Cooper Teebpologies, LLC

SETUP > PROFILE

The **Profile** page contains the information of the account holder.

Key points:

- If there needs to be a change in the account holder due to staff changes, you can edit this page to the new person handling the account. Simply change the username, personal information and email address.
- "Set Start Date for Reports" Set the date you want the default Start Date in the Report Date Range filters. The End Date will default to the current date.

rofile	Opdate Prome			
voices	Program Code	PCode		
ite Codes	Program Name	Program Name		
ata Sharing	Username	Username		
	Set Start Date for Reports			
	Data Entry Administrator	First First Name	Last Last Name	
	Mailing Address	Mailing Address		
	City, State, Zip	City	State Zip	
	Phone, Fax	Phone	Fax	
	Coordinator Email	Email Address		
	Website (if available)			

SETUP > INVOICES

View your invoice history in this section. Invoices can be download as a pdf and emailed to other staff.

If you have an open invoice, you will have a message on your home page, be able to access it here in this section and have an option to pay with a credit card.

Setup Reports	O Invoices				
Profile Invoices Site Codes Data Sharing	Show •	entries Due Date	Amount Due	Search:	
	15081	05/13/2017	\$600.00	\$600.00 Pre	evious 1 Next

SETUP > SITE CODES

Site/Fund Codes can be assigned to other programs from this section.

- Click on "Add Site/Fund Code"
- A pop-up will allow you to enter the Code Name and select from the list of programs that have accepted Data Sharing. You can select multiple programs to assign to the code
- The Codes you have created will be listed on the Site Codes page and will list the programs you have assigned the Site Codes to.
- Edit Change the Site Code name. Add / Remove programs from the code.
- Delete Delete will remove the code completely from the programs, from your account and from the database. Deleting is only an option for Site Codes that are not assigned to any guardians.

Setup Reports	Support					
Log Out Profile	Your information was success	fully saved.			×	
» Invoices	O Setup Site/Fund Codes					
 » Site Codes » Data snaring 			+Add Site/Fund Code			
	Site/Fund Codes Entered					
				Show?		
	Site Code 01 Coalition of Health Services Irving ISD)		Ø	💉 Edit 📋 Delete	
	Cre	eate Site/Fund Code				2
	<mark>'e</mark> t	Enter Site/Fund Code	Site Code 02			
		Programs	Coalition of Health Services 🔹			
	Rep		I			
			Select All Deselect All		Create	Cancel
	_	Your information was	Coalition of Health Services Irving ISD	-		
		O Setup Site/Euro	TX- Catholic Charities, San Antonio			

SETUP > DATA SHARING

When first signing up for a State Account, you'll need to set up your Data Sharing Agreements with the programs. Search for your programs by "code" or "name". Choose from the programs in the search results to send requests to. The program administrator will receive an email notifying that there is a request in their Data Sharing section.

See <u>Data Sharing Tutorial</u> for more details.

Setup Reports	Support						
🕞 Log Out	O Data Sharing Agreements						
» Profile	Type a program or name and click Search to find a program you need.						
» Site Codes			code 🔹	Search			
» Data Sharing	» Data Sharing Send request to a program you want to include in reporting. Click Send Request to send request email to a Program Administ						
	Program	Administrator	Email address				
	TX-1206A - TX-Houston ISD, 1206A	Admin_Name	Admin_email	Unsubscribe			
	TX-1210A - TX-Richardson ISD HIPPY, 1210A	Admin_Name	Admin_email	Unsubscribe			
	TX-1212A - Irving ISD	Admin_Name	Admin_email	Unsubscribe			
	TX-1218A - TX-Univ of Tx of the Permian Basin,1218A	Admin_Name	Admin_email	Unsubscribe			