

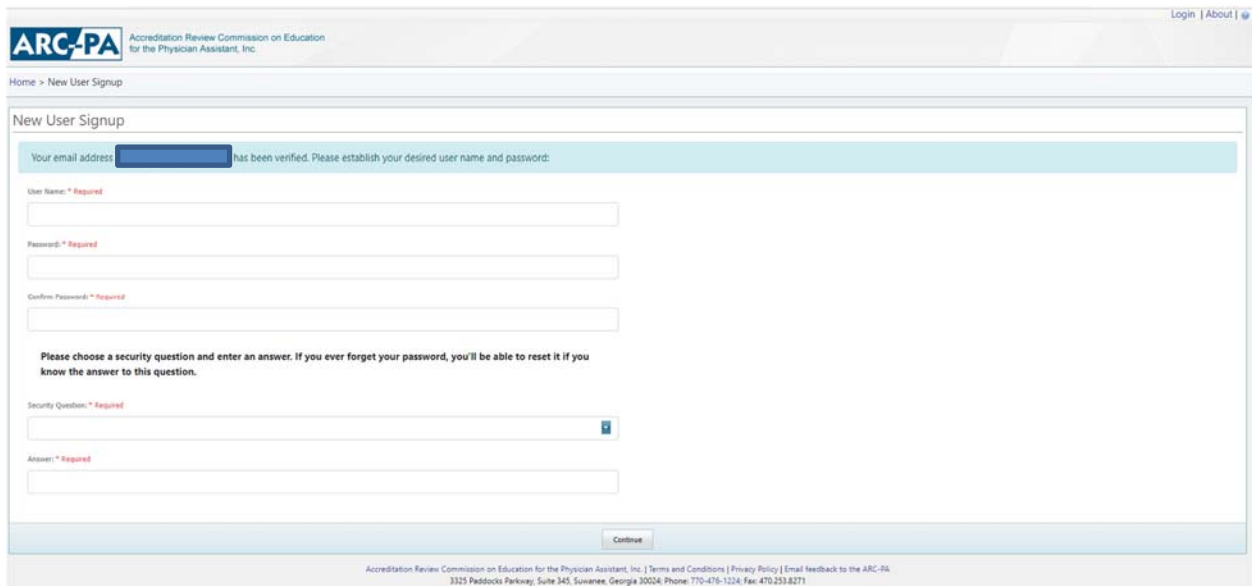
The ARC-PA Program Management Portal: HOW TO BEGIN
June 2023

To access the ARC-PA Program Management Portal (the Portal), you must be invited by the ARC-PA or someone in your program with authorization to invite new users.

New users will receive an email invitation to join the Portal.

When you follow the link in the invitation email you will be taken to the following screen:

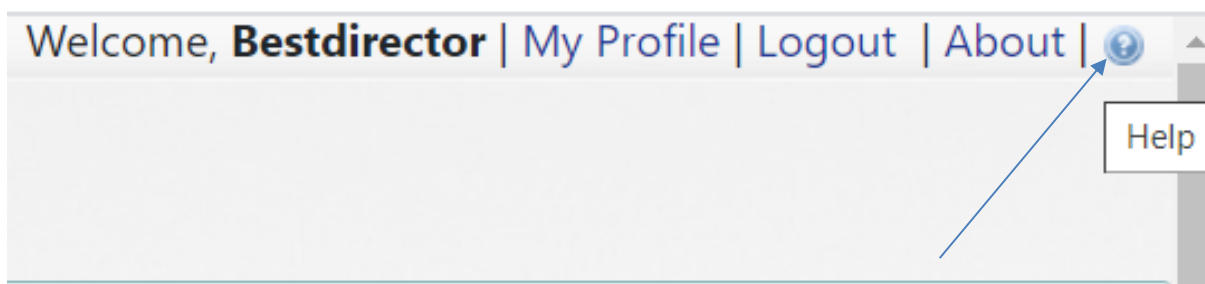
SCREEN TO ACTIVATE USER



PLEASE follow the directions on the screen to become **ACTIVATED** in the system.

You will be asked to accept the Terms and Conditions for use of the Portal. After agreeing, you will be taken to the Program Dashboard, your program home page. Users with **Program Admin** status may then give permission to others in your program to enter data.

It is **STRONGLY SUGGESTED** that **you complete the online Portal Training sessions and or review the User Manual to help you as you enter data.** The User Manual can be accessed within the Portal. The User Manual can also be found on the ARC-PA website, Portal page, with the online Portal Training sessions and other useful Portal resources at <https://www.arc-pa.org/portal/>.



If you have questions that cannot be answered by the on-line User Manual or the resources on the Portal page of the website, email the ARC-PA Portal team by using the "Email feedback to the ARC-PA" link at the bottom of each page of the ARC-PA Program Management Portal. If your email client does not interact with this link, send your comments directly to portalfeedback@arc-pa.org. DO NOT email questions about Portal use directly to the ARC-PA general email or individual staff.

ONLY AFTER you are activated will you be able to access the Portal to enter or edit data. The Portal may be accessed by going onto the ARC-PA website and clicking on **Portal Login** under Quick Links or by using the following link: <https://portal.arc-pa.org>.

LOG IN SCREEN FOR ACTIVATED USERS

ONCE ACTIVATED, if you have forgotten your Portal username, contact portalfeedback@arc-pa.org. If you have forgotten your password, you may retrieve it or reset it after you enter your user ID.

Steps for Creating Additional Users

Add a new user by clicking on the Personnel tab from the Program Detail page.

Only those with **Program Admin** status can AUTHORIZE ACCESS to the Portal by others in the program. PLEASE NOTE that those authorized will receive their own email from the Portal and will have to validate their email and establish a user ID before entering information.

To add personnel:

- 1 Click any **New** link, as shown:

Program Detail

Program Type: Entry Level

Contact	Program General	Sponsoring Institution	Personnel	SCPE Sites	Students																								
<p>**Program Director</p> <p>Mr Paul Director - INTERIM</p> <p>User Name: Pending bestdir@best.edu (123) 456-7891 x0</p> <p>[Edit] [Delete]</p> <p>Enter text to search...</p> <table border="1"> <thead> <tr> <th></th> <th>User Name</th> <th>Full Name</th> <th>Standards Required Role</th> <th>FTE Percent</th> <th>Int</th> </tr> </thead> <tbody> <tr> <td>New Edit Delete</td> <td>Create User</td> <td>Mr Paul Chair</td> <td>PA-C principal faculty</td> <td>100.00 %</td> <td></td> </tr> <tr> <td>New Edit Delete</td> <td>bentest</td> <td>Mr Ben Test Silverberg</td> <td>administrative support staff</td> <td>100.00 %</td> <td></td> </tr> <tr> <td>New Edit Delete</td> <td>Pending</td> <td>Dr Rudolph Reindeer</td> <td>Medical Director</td> <td>50.00 %</td> <td></td> </tr> </tbody> </table>							User Name	Full Name	Standards Required Role	FTE Percent	Int	New Edit Delete	Create User	Mr Paul Chair	PA-C principal faculty	100.00 %		New Edit Delete	bentest	Mr Ben Test Silverberg	administrative support staff	100.00 %		New Edit Delete	Pending	Dr Rudolph Reindeer	Medical Director	50.00 %	
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The **Add/Edit Person** dialog box appears:

Add/Edit Person

User Name: Person has no user account! ☐ Interim Role ☐ Portal Access

Person Detail	Phone #'s	Program Info	Campuses
<p>Name Prefix: * Required: None</p> <p>First Name: * Required: Institution Title</p> <p>Middle Name: Last Name: * Required:</p> <p>Credentials: * Required: Email: * Required:</p> <p>Work Address: <input checked="" type="checkbox"/> Same As Program Address 1234 Fifth St Atlanta, GA 20220</p> <p>Save Cancel</p>			

Tabs separate the information: **Person Detail**, **Phone #s**, **Program Info**, and **Campuses**.

Note: Wait until you have entered information on all tabs to click the **Save** button at the bottom. Clicking **Save** saves information you have entered on all tabs **AND** closes the dialog box.

2 Fill in the fields on each tab, as applicable. Refer to the Portal User Manual, Chapter 2, Navigating the ARC-PA Program Portal, Entering Program Detail, Personnel, for instructions.

User Administration tab:

If you want the personnel you have entered to be able to access the Program Portal and enter data, you must make them a Portal User and assign them a User Role. If you do not want them to be able to access the Program Portal and enter data, do not make them Portal Users.

Note: To create a Portal User, the Personnel record must first be saved.

Then see below, to **Create a Portal User**.

To Create a Portal User

Starting from the Personnel Table:

- 1 Create a personnel record using the **Personnel** tab. When you add the person, all required fields must be completed before that person is able to access the **Program Portal**. Note that in the **User Name** column, the command **Create User** appears.
- 2 Click **Create User** as shown:

Program Detail

Program Type: Entry Level

Contact	Program General	Sponsoring Institution	Personnel	SCPE Sites	Students
<p>Program Director</p> <p>Mr Paul Director - INTERIM</p> <p>User Name: Pending bestdir@best.edu (123) 456-7891 x0</p> <p>[Edit] [Delete]</p>					
<p>Enter text to search...</p>					
	User Name	Full Name	Standards Required Role	FTE Percent	Int
New Edit Delete	Create User	Mr Paul Chair	PA-C principal faculty	100.00 %	
New Edit Delete	bentest	Mr Ben Test Silverberg	administrative support staff	100.00 %	
New Edit Delete	Pending	Dr Rudolph Reindeer	Medical Director	50.00 %	
New Edit Delete	Pending	Ms Cathy Noel	non PA principal faculty	50.00 %	

This dialog box appears:

Create user account for this person

First Name * Required: Jack

Last Name * Required: Frost

Security Role: Program Admin

Create Account Cancel

3 Select a **Security Role**

You have these roles to choose from:

Program Admin-- These users are the main contacts for your program including the Program Director or others assigned by the Program Director. These users can enter/see budget data and can push the Submit Button which will appear when the program Required Annual Report to the ARC-PA is due. They are also able to add, edit and delete personnel from the Portal.

Program Staff--These are the personnel who can edit Portal information needed for accreditation.

4 Once you select the role, click **Create Account**.

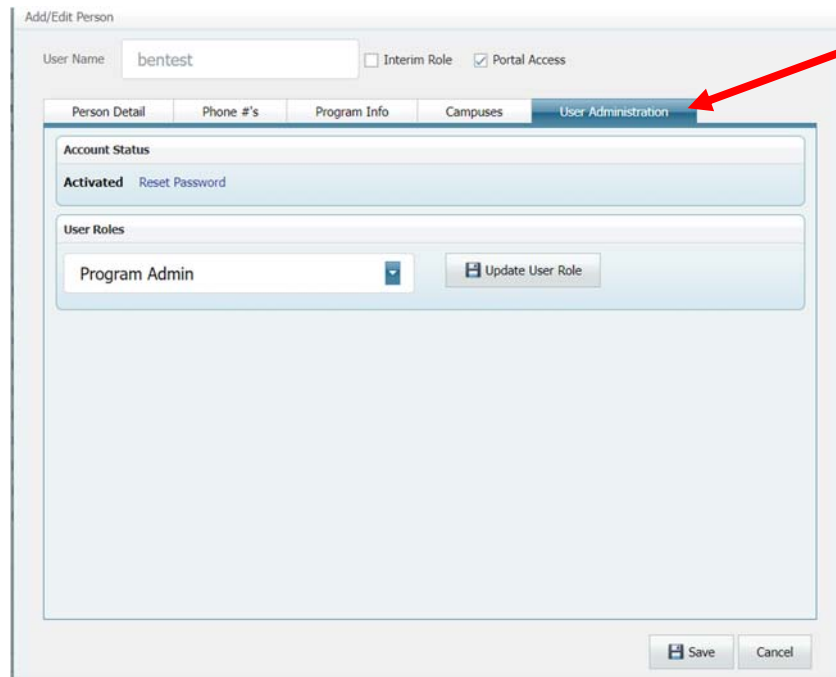
This sends the Portal Welcome email to the person you want to set up as a Portal User. The email instructs the person to click on a link to set up their user account.

The column **User Name** shows **Pending** until the individual clicks the link in the email and sets up their username, password, and security question. When complete, the **User Name** column shows the username entered by the user.

Once a user has configured their account, the Username that the user entered, and the Reset Password link will be visible.

The Add/Edit Person Dialog:

The **User Administration** tab from the **Add/Edit Person** dialog can only be used when editing an already existing personnel record. This tab can be used to resend the welcome email or, to reset a user's password once the user has set up a username, password, and security question.



The screenshot shows the 'Add/Edit Person' dialog box with the 'User Administration' tab selected. The 'User Name' field contains 'bentest'. There are checkboxes for 'Interim Role' (unchecked) and 'Portal Access' (checked). The 'Account Status' section shows 'Activated' with a 'Reset Password' link. The 'User Roles' section shows 'Program Admin' with an 'Update User Role' button. A red arrow points to the 'User Administration' tab. At the bottom are 'Save' and 'Cancel' buttons.

If the user account hasn't been created yet, the **User Name** will have a **Create User** link available.

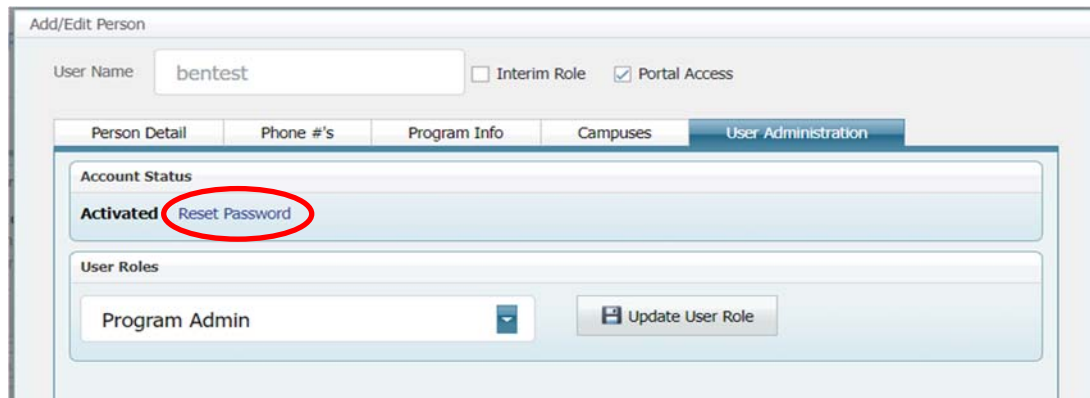
To manage a User

Program administrators can manage the account a person uses to log into the Portal. Options for sending the user a new password, changing the user's security role, and disabling Portal access are available.

Reset Password

Once the user has completed the account setup process, the **Account Status** is **Activated**. In addition, the **Reset Password** link is available.

- 1 Click the **Reset Password** link to send an email to the user to initiate the password reset process.



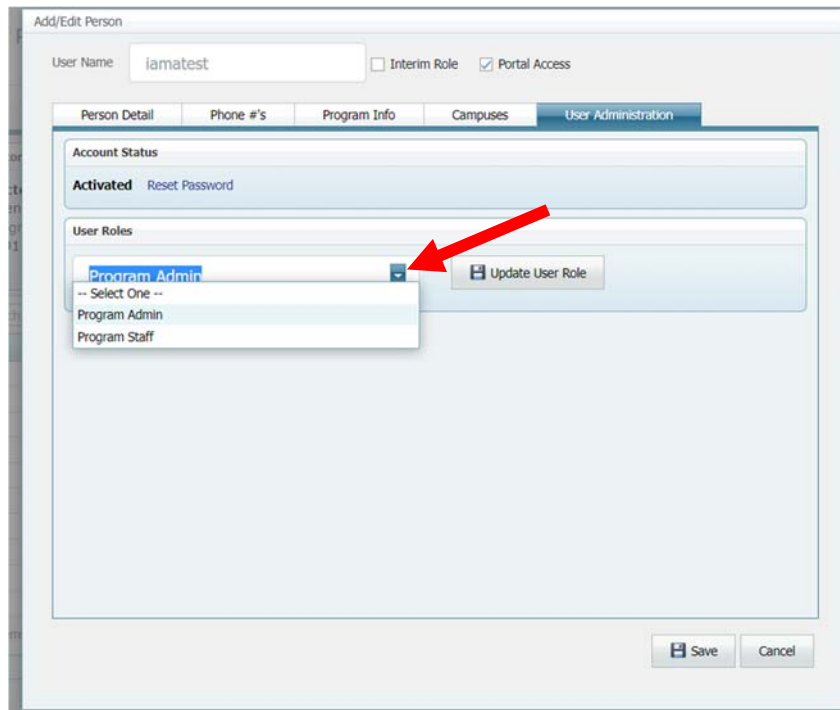
The screenshot shows the 'Add/Edit Person' form with the 'User Administration' tab selected. The 'User Name' field contains 'bentest'. The 'Interim Role' checkbox is unchecked, and the 'Portal Access' checkbox is checked. The 'Account Status' section shows 'Activated' and a 'Reset Password' link circled in red. The 'User Roles' section shows 'Program Admin' selected in a dropdown menu.

- 2 A confirmation message will appear if the password reset is successful.

Change Role

Follow these instructions if you want to change a user's role.

- 1 Select the role from the User Role drop-down.



The screenshot shows the 'Add/Edit Person' form with the 'User Administration' tab selected. The 'User Name' field contains 'iamatest'. The 'Interim Role' checkbox is unchecked, and the 'Portal Access' checkbox is checked. The 'Account Status' section shows 'Activated' and a 'Reset Password' link. The 'User Roles' section shows a dropdown menu open with 'Program Admin' and 'Program Staff' options. A red arrow points to the dropdown menu.

- 2 Select the **Update User Role** button and **Save** to close.

Disable Portal Access

Follow these instructions if you want to disable a user's access to the **Program Portal**.

- 1 Deselect the **Portal Access** checkbox at the top of the Add/Edit Person screen.

The screenshot shows the 'Add/Edit Person' form. At the top, there's a 'User Name' field with 'bentest' and an 'Interim Role' checkbox. The 'Portal Access' checkbox is checked and circled in red. Below this are tabs for 'Person Detail', 'Phone #'s, 'Program Info', 'Campuses', and 'User Administration'. The 'User Administration' tab is active, showing 'Account Status' as 'Activated' with a 'Reset Password' link. Under 'User Roles', there's a dropdown menu showing 'Program Admin' and an 'Update User Role' button.

2 Select **Save**.

Please remember the following regarding Personnel Status.

Those with **Program Admin** status can enter/see budget data and push the Submit button for the annual report. They are also able to edit and delete personnel from the Portal. Additionally, those with Program Admin status may manage the account a person uses to log in. They can re-send the welcome email to re-set passwords, change a user's security role and disable portal access.

Those with **Program Staff** status can edit information needed for accreditation. They cannot delete personnel from the Portal. They have no access to/cannot see the budget tab or the Submit button.

IMPORTANT REMINDER, look for and click on **SAVE** when you see it, after you have entered data. The Contact, Program General, Sponsoring Institution, Students and Annual Report tabs have this button at the bottom of the page. Other tab pages such as Personnel, SCPE Sites, and Program Budget have the SAVE button when a separate pop-up window is clicked (such as New, Edit, Delete).

WHEN DOES THE ARC-PA ACCESS PORTAL DATA?

The ARC-PA staff will routinely access the program's data as noted below. Programs are expected to keep their data accurate and up to date at all times.

- To find contact information for the program director, faculty, staff, chief administrative/academic officer, and the individual to whom the program director reports.
- To link to the program's web site and posted NCCPA PANCE report.
- To verify information entered by the program as a means of updating information in the ARC-PA files, such as program personnel, degree awarded, regional accreditation status, tuition and budget information, students enrolled, supervised clinical practice experiences (SCPEs), etc.
- After receiving a change notice of personnel to be sure the change has been documented correctly in the Portal.
- To check on the status of "reports due" to the ARC-PA as required by an accreditation letter.
- During a commission meeting when a program is scheduled on the meeting agenda.
- After receiving a question from the program about its Portal site.
- Concurrently with an authorized program user when that person has asked a question.
- When alerted by the Portal that the program has uploaded a document for submission to the ARC-PA as requested by the ARC-PA.
- When an alert is received for any of the following:
 - Campus added.

- Change to degree(s) awarded.
- Change to program length.
- Sponsoring institution name change.
- Sponsoring institution regional accreditation status (updated or changed).
- Chief administrative/academic officer changed.
- Program director changed.
- Medical director changed.
- Interim program director appointed.
- Interim program director in place longer than 12 months.
- Change in person to whom the program director reports.
- Principal faculty total does not meet the Standards.
- Class size exceeds maximum entering ARC-PA approved number.
- PANCE first time taker pass rate drops to 85% or less.
- SCPEs (active and agreements in place) are not equal to the number of students in the clinical phase.
- Budget decrease of 20% or more.
- Reports due, date missed.

Staff will review the Portal of all programs scheduled on an ARC-PA agenda for any action.