



*Accreditation Review Commission on Education
for the Physician Assistant, Inc.*



Post Graduate Program User Manual for the ARC-PA Program Management Portal

ARC-PA

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Chapter 1: Getting Started

Logging into the PA Program Management Portal

The login page is the first page you see when you open the ARC-PA Program Management Portal.

To log into the Portal, you must have already registered as a user of the Portal. You should have received an email from the ARC-PA Portal with a link to the registration page. On the registration page, you are required to enter a username, create a password, select a security question, and agree with the Portal Terms and Conditions before you can use the Portal.

1. Open the ARC-PA program management Portal. <https://portal.arc-pa.org/> The **Login** page appears.



2. Enter your username. This is the name you selected when you registered.
3. Enter your password.

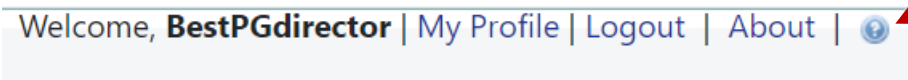
Note: If you have forgotten your password, click **Forgot Your Password?** You will be asked to answer the security question you selected when you registered. If you answer correctly, an email will be sent to you with a temporary password. You will be required to use and then change this password the next time you log in. If you have forgotten your username or the answer to your security question, contact the system administrator at portalfeedback@arc-pa.org.

4. After you enter your username and password, click **Log In**. The system logs you into the Portal.

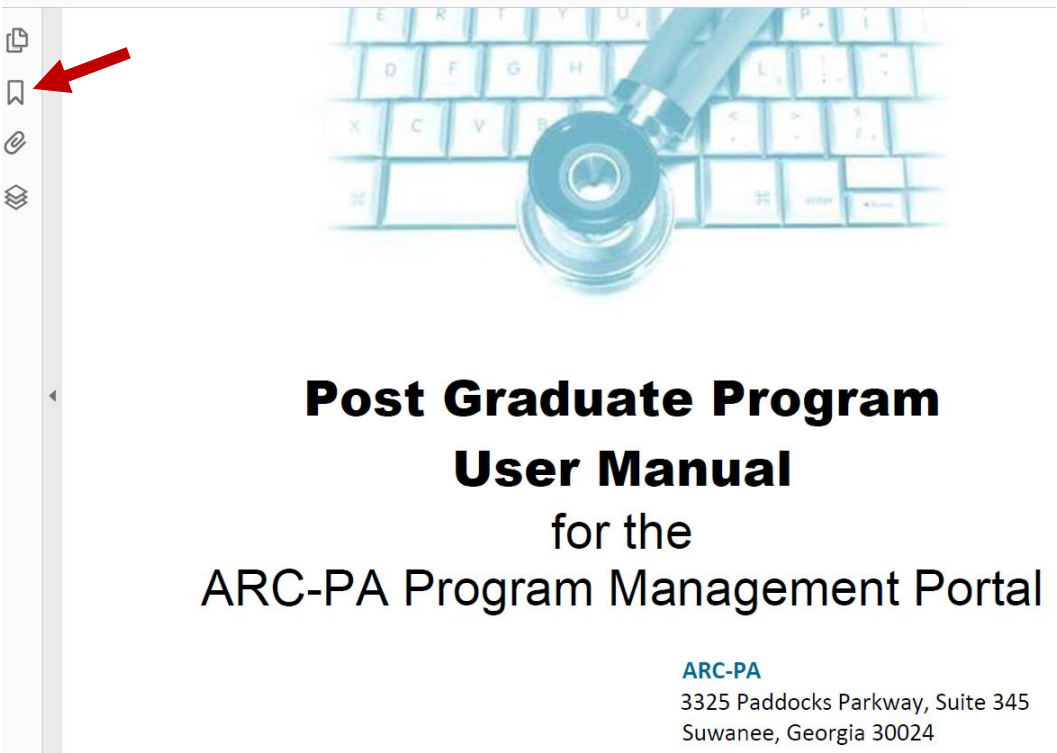
Getting Help

There are several ways you can get help with the Portal:

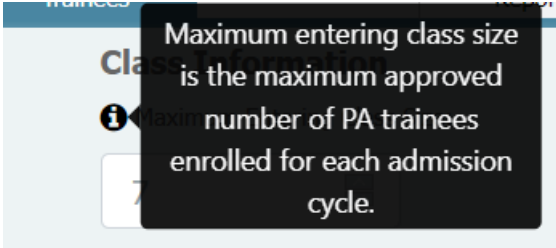
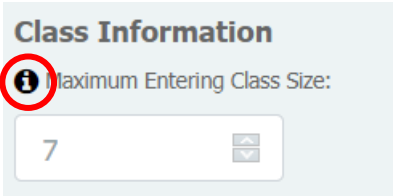
Online help: This is available by clicking the question mark you see at the upper right corner of any Portal page:



If the Table of Contents panel does not open automatically, click on the bookmark to access links to the various sections of the User Manual.



Inline help: This is brief help that appears when you hover the cursor over a (i) icon next to some fields. For example, hovering over the (i) icon for the **Maximum Class Size** field on the **PA Trainees** tab will display this inline help:



Editing Your Profile

1. Click **My Profile** at the top of the program Portal page.



You can edit the following on your profile:

My Profile

[Change My Password](#) | [Change My Security Question](#)

User Name:

First Name: * Required

Middle Name:

Last Name: * Required

Email Address: * Required

- **First Name**
- **Middle Name**
- **Last Name**
- **Email Address**

2. Click **Save** when you are finished.

Changing Your Password

1. Click **My Profile** at the top of the program Portal page.



2. Click **Change My Password** located immediately beneath "My Profile."

3. The **Change Your Password** page will appear.

4. Enter the following:
 - **Current Password:** Enter the password you have been using.
 - **New Password:** Enter a new password.

Note: Enter at least five characters, one of which must be non-alphanumeric, such as an ampersand, comma, quote, etc.

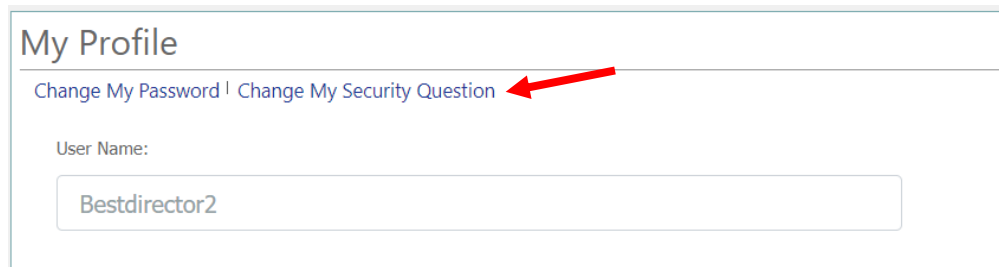
- **Confirm New Password:** Retype the password you entered in the previous field exactly.
5. Click **Save** when you are finished or **Cancel** if you do not want to change your password.
 6. You will be returned to the **My Profile** page.

Changing Your Security Question

1. Click **My Profile** at the top of the program Portal page.



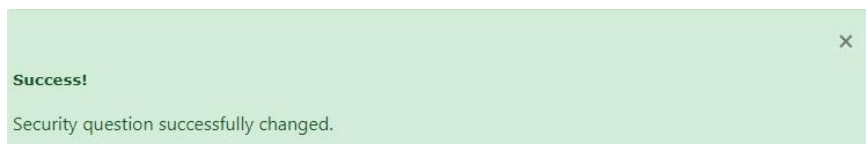
2. Click **Change My Security Question** located immediately beneath "My Profile."



3. The **Change Your Security Question** page will appear.

The screenshot shows the 'Change Your Security Question' page. At the top, there is a light blue box with the following text: 'Please enter your **current password** and then choose a security question and enter an answer. If you ever forget your password, you'll be able to reset it if you know the answer to this question.' Below this, there are three input fields: 'Current Password: * Required', 'Security Question: * Required' (a dropdown menu), and 'Answer: * Required'. At the bottom of the form, there are 'Save' and 'Cancel' buttons.

4. Enter the following:
 - **Current Password:** For security purposes, you must reenter your current password to change your security question.
 - **Security Question:** Select one of the security questions from the list of options.
 - **Answer:** Type an answer to the selected security question.
5. Click **Save** when you are finished or **Cancel** if you do not want to change your security question.



6. Exit out of the success message. Click on **Cancel**, and you will be returned to the **My Profile** page.

Using Search

To do a search

Type the criteria into the Search box. For example,

Navigation tabs: Contact, Program General, Sponsoring Institution, Personnel, SCPE Sites, PA Trainees, Program Budget

****Program Director**

Dr Peter Rabbit
 User Name: PeterRabbit
 ericaholiday@arc-pa.org
 (404) 888-8888

[Edit] [Delete]

****Program Director**

Dr Clark Kent
 clarkkent@bpgj
 (404) 111-1111

Search box: faculty

	User Name	Full Name	Standards Required Role	FTE Percent	Interim
New Edit Delete	Pending	Mrs Joan Rivers	PA-C Program Faculty	50.00 %	<input type="checkbox"/>
New Edit Delete	Pending	Ms Wonder Woman	PA-C Program Faculty	50.00 %	<input type="checkbox"/>
New Edit Delete	BestPGdirector	Ms Power Ranger	PA-C Program Faculty	50.00 %	<input type="checkbox"/>
New Edit Delete	Create User	Dr Bruce Wayne	PA-C Program Faculty	50.00 %	<input type="checkbox"/>

You can type in all or part of the search criteria. In the following example, typing **internal** gives a result like this:

Navigation tabs: Contact, Program General, Sponsoring Institution, Personnel, SCPE Sites, PA Trainees, Program Budget

Enter the supervised clinical practice experience (SCPE) sites used by the program for hospital, clinic, or office settings. Capacity refers to clinical yearly capacity. Mark those planned for use during the current clinical phase.

Search box: internal

	Site Name	Active	State	Written Agreement	Distance From Main Campus	Clinical Experiences Required of ALL PA Trainees
New Edit Delete	ABC Medical Center	<input checked="" type="checkbox"/>	GA	<input checked="" type="checkbox"/>	1.00	internal med(Capacity = 7), surg(Capacity = 7)
New Edit Delete	St. Best Hospital	<input type="checkbox"/>	GA	<input checked="" type="checkbox"/>	15.00	internal med(Capacity = 7)

You can sort each column in ascending or descending order by clicking on the arrow near its heading. For example, sorting by **Active** in the SCPE tab will sort clinical sites by those that are and are not active.

Program Type: Clinical Postgraduate

Navigation tabs: Contact, Program General, Sponsoring Institution, Personnel, SCPE Sites, PA Trainees, Program Budget

Enter the supervised clinical practice experience (SCPE) sites used by the program for hospital, clinic, or office settings. Capacity refers to clinical yearly capacity. Mark those planned for use during the current clinical phase.

Search box: Enter text to search...

	Site Name	Active	State	Written Agreement
New Edit Delete	St. Best Hospital	<input type="checkbox"/>	GA	<input checked="" type="checkbox"/>
New Edit Delete	ABC Medical Center	<input checked="" type="checkbox"/>	GA	<input checked="" type="checkbox"/>
New Edit Delete	St Elsewhere Hospital	<input checked="" type="checkbox"/>	GA	<input checked="" type="checkbox"/>

All search results allow you to click **Edit** to change information.

Chapter 2: Navigating the ARC-PA Program Portal

Using the Dashboard

The Dashboard gives you a snapshot of program information and allows you to access other parts of the program Portal quickly.

This is the page you see when you first log into the ARC-PA Program Portal.

From this page, you can see a brief synopsis of the program, a link to where you can manage program detail and documents, and an area that shows any reviews scheduled.

Note: Upcoming Reviews and Materials Due are added by the ARC-PA.

Program Dashboard

Program Type: Clinical Postgraduate

335

Program Details	
Official Program Name:	Z THE BEST POSTGRADUATE PROGRAM
First Accredited Date:	03/2020
Current Accreditation Status:	Provisional
Program Website:	http://www.test.edu
Sponsoring Institution:	The Best Institution (GA)
Sponsoring Institution Website:	http://www.bestinstitution.org
Program Director:	Dr Peter Rabbit (ericaholiday@arc-pa.org)

Upcoming Reviews		
Review Type	Meeting Date	Materials Due
Accreditation Review	September 2024	TBD
Reports Due	September 2023	5/10/2023

Note: Upcoming Reviews are always sorted by the date in **Materials Due** column.

Navigation

Icon Menu (upper right corner)

There are four icons in the upper-right corner of the page:



These icons appear on the **Program Dashboard** and on every **Program Detail** tab. Definitions for each icon are as follows:



Program Dashboard: This returns you to the **Program Dashboard** page.



Program Detail: This takes you to the **Contact** tab of the Program Detail page.

Note: From the **Program Dashboard** page, you can also click **Manage Program Detail** under the **Action Center** grouping (right side of screen) to get to the **Program Detail** page.



Program Documents: This takes you to the **Program Documents** page where you can attach documents.

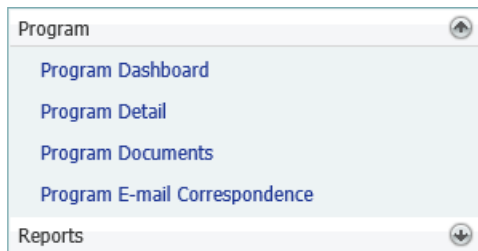
Note: From the **Program Dashboard** page, you can also click **Manage Program Documents** under the **Action Center** grouping (right side of screen) to get to the **Program Documents** page.



Program E-mail Correspondence: The **Mail** icon opens the **Program E-mail Correspondence** page.

The Menu (upper left corner)

The left-side navigation provides options to get to the same pages as the icons in the upper-right corner of the page.



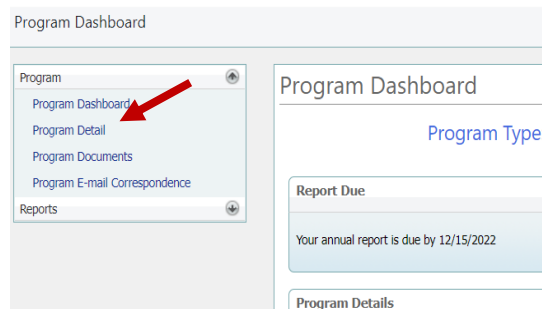
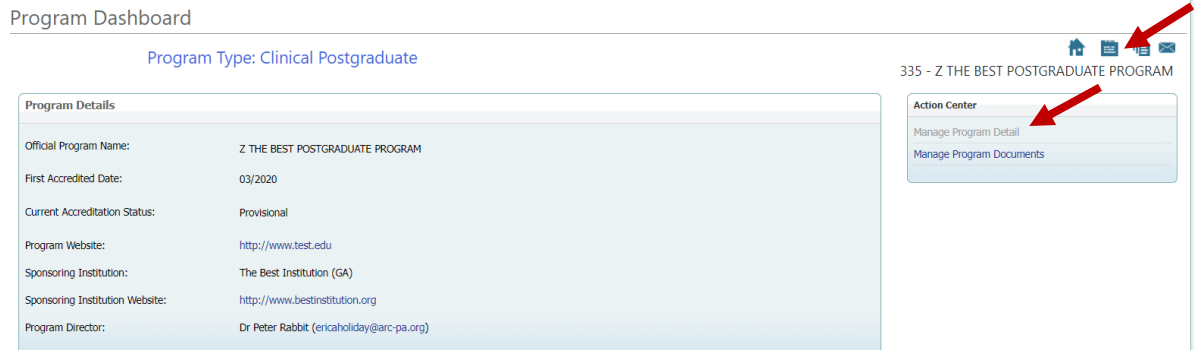
Entering Program Detail

The **Program Detail** screens allow programs to enter information about the program, such as its name, contact information, program general information, sponsoring institution and accreditation status, details concerning personnel, clinical facilities and experiences, trainee stipend, trainee enrollment, and the program's budget.


The page contains details of the program arranged into tabs. It is where programs can enter and make changes to the information.

To Access the Program Detail screen:

1. When you log into the Portal, the **Program Dashboard** appears.



2. Open **Program** in the left navigation box, and then click **Program Detail**. Alternatively, you can select the

Program Detail icon  from the upper right of the **Program Dashboard** page or select **Manage Program Detail** from the **Action Center** on the right. The information is divided into tabs which contain information you can edit.

The tabs include:

- Contact
- Program General
- Sponsoring Institution
- Personnel
- SCPE Sites
- PA Trainees
- Program Budget

Contact

1. From Program Detail, select the **Contact** tab. The following appears:

Program Detail

Program Type: Clinical Postgraduate 335 - Z THE BEST POSTGRADUATE PROGRAM

Contact	Program General	Sponsoring Institution	Personnel	SCPE Sites	PA Trainees	Program Budget									
<p>Official Program Name * Required</p> <p>Z THE BEST POSTGRADUATE PROGRAM</p> <p><small>View Historical Names</small></p> <p>Program Mailing Address</p> <p>1234 Fifth St. Atlanta, GA 20220</p> <p>Program Website Address</p> <p>http://www.test.edu</p> <p>Program Email Address</p> <p>bestPG@program.edu</p> <p>Primary Phone</p> <p>(404) 888-8888 x _____</p> <p>Fax Phone</p> <p>(989) 888-7777 _____</p> <p><small>Note: To Manage Campus enrollment, please use the "Students" Tab.</small></p> <table border="1"> <thead> <tr> <th colspan="3">Campus Information</th> </tr> <tr> <th>Name</th> <th>City</th> <th>State</th> </tr> </thead> <tbody> <tr> <td>New Edit (Main) Z THE BEST POSTGRADUATE PROGRAM Main Campus</td> <td>Atlanta</td> <td>GA</td> </tr> </tbody> </table> <p style="text-align: right;">Save Tab</p>							Campus Information			Name	City	State	New Edit (Main) Z THE BEST POSTGRADUATE PROGRAM Main Campus	Atlanta	GA
Campus Information															
Name	City	State													
New Edit (Main) Z THE BEST POSTGRADUATE PROGRAM Main Campus	Atlanta	GA													

2. Enter or change the following information, as necessary:

- **Official Program Name.** This is the **name of the program**. You may edit this by typing over the name and clicking **Save Tab**. If the program's name is officially changed, please contact the ARC-PA in addition to updating it on the Portal.
- **Program Website Address.** This is the **URL for the program website**. This URL should link directly to the **program** website and not to the general institution website.
- **Program Email Address.** This is the **email address** for the program.
- **Program Mailing Address.** This is the **street mailing address** for the program.
- **Primary Phone.** This is the **primary contact phone number** for the program.

Important: This number should be one that is answered personally by a contact familiar with the program and not only by an automated system.

- **Fax Phone.** This is the **fax number** used to receive information from ARC-PA.
- **Campus Information.** The **"main campus"** is considered to be the location where the approved PA program is housed, regardless of whether that is the institution's main location or a satellite campus within the same geographical area. It is entered by the ARC-PA upon set up of the program's Portal.

"Distant campuses" are added by the program once approved by the Commission.

A **Distant Campus** is a campus geographically separate from the main program and must be approved by the Commission. You can enter or change campus information, including the name, city, state, and distance to main campus, by clicking **New** or **Edit**.

The main campus was set by ARC-PA and cannot be deleted. You can delete subsidiary campuses by clicking **Delete**, if there are no Personnel, SCPE or Budget records associated with them.

3. When you are through making changes, click **Save Tab**.

Program General

- From **Program Detail**, select the **Program General** tab. The following appears:

Program Detail

Program Type: Clinical Postgraduate

335 - Z THE BEST POSTGRADUATE PROGRAM

Contact Program General Sponsoring Institution Personnel SCPE Sites PA Trainees Program Budget

Current Accreditation Status
 Provisional
 Administrative Probation
 Program Type * Required
 Clinical Postgraduate
 First Accredited Date
 03/2020
 Degree Awarded at Completion of Program
 -- None --
 Program Institutionally located in
 Hospital
 Previously Accredited Program

Start of Fiscal Year
 July
 Clear Start of Fiscal Year
 Month(s) Classes Begin
 January
 Clear Month(s) Classes Begin
 Month of Graduation
 December
 Clear Month of Graduation
 Do you Offer a Part-time Program Option? * Required
 Yes No

Number of Classes Admitted Per Calendar Year
 1
 Length of the entire Clinical Postgraduate Program (months)
 12.0

Save Tab

- You see the following information:

- Current Accreditation Status.** This is set by the ARC-PA. It can be changed only by ARC-PA. The **Accreditation Statuses** are as follows:
 - Provisional**
 - Continued**
 - Probation** The program retains access to its Portal during this time.
 - Administrative Probation** The program retains access to its Portal.
 - Voluntary Inactive Status** The program may still have Portal access.
- Program Type.** This is selected by ARC-PA on initial entry of the program and cannot be changed by the program.
- First Accredited Date.** This is selected by the ARC-PA on initial entry of the program and cannot be changed by the program.
- Degree Awarded at Completion of Program.** Select certificate, if awarded at the completion of the program.
- Program Institutionally located in.** The institution where the program is housed.
- Previously Accredited Program.** This is entered by ARC-PA on initial setup and cannot be changed by the program.
- Start of Fiscal Year.** Select month of start of fiscal year.
- Month(s) Classes Begin.** The starting month(s) of the accredited curriculum. If a program starts more than one class per calendar year, it can select multiple options.
- Month of Graduation.** Month trainees in the current cohort are scheduled to complete the program.
- Do You Offer a Part-time Program Option?** Select Yes or No.
- Number of Classes Admitted per Calendar Year.** Number of trainee cohorts that begin the program in a calendar year.
- Length of ARC-PA Accredited Program (Months).** The number of months necessary to complete the entire program.

Note: You can enter the accredited program length as a number and decimal. For example, you can enter 15.5. You cannot enter hundredths (i.e., .25, .75, etc.).

- When you are through making changes, click **Save Tab**.

Sponsoring Institution

1. From **Program Detail**, select the **Sponsoring Institution** tab. The following appears.

Program Detail

Program Type: Clinical Postgraduate

335 - Z THE BEST POSTGRADUATE PROGRAM

Contact Program General **Sponsoring Institution** Personnel SCPE Sites PA Trainees Program Budget

****** Institutional Sponsor: * Required

The Best Institution

Type of Institution: Public

Institution Web Address: http://www.bestinstitution.org

Institution Description: Medical Center

****** Chief Administrative Officer of the Sponsoring Institution

Dr New Guy
newguy@bestinstitution.edu
(404) 123-4567

[Edit] [Delete] [Create User]

Regional Accreditation By: Joint Commission as a hospital/medical center or ambulatory clinic

Clear Accreditation Body

Regional Accreditation Status: Accredited

Year Awarded: 2009

Year of Next Review: 2029

Not for profit

Save Tab

2. Enter or change the following information:

- **Institutional Sponsor.** This can only be changed by the ARC-PA. If this needs to be changed, please contact the ARC-PA.
- **Type of Institution.** The type of institution: Public, Private, or Military.
- **Institution Web Address.** Enter the Web address for the sponsoring institution here.
- **Institution Description.** The item from the drop-down list that most closely describes the sponsoring institution.
- **Regional Accreditation By.** Select the organization that accredits the institution by clicking the **Ellipsis** button. From the dialog box that displays, click the drop-down arrow to select an organization from the accreditation list.
- **Regional Accreditation Status.** The status as given by the regional accreditation organization.
- **Year Awarded.** The year the most current regional accreditation status was received.
- **Year of Next Review.** The date when the institution will next receive a review of its regional accreditation status.
- **Not for profit.** This box is checked if the institution is recognized as a not-for-profit institution by the federal government.
- **Chief Administrative Officer.** This is used to enter, edit, or delete the name of the president or the person holding the equivalent status at the institution. Click **New** or **Edit**. You can edit all the information. If the officer is to have access to the system, click on **Create User** after you have saved the officer's information. There can be only one Chief Administrative Officer; however, you can delete the officer at any time.

Note: If the **Chief Administrative Office** is the same person as the **Program Director Reports To**, you can select to have the **Program Director Reports To** person appear as the **Chief Administrative Officer**. In this case, do not enter a Chief Administrative Officer on the Sponsoring Institution Tab, but rather edit the **Program Director Reports To** person from the Personnel Tab and select the check box as shown in the image below.

3. When you are finished, click **Save Tab**.

Personnel

1. From **Program Detail**, select the **Personnel** tab. The following appears.

2. Enter or change the following information:

- **Program Director.** You can enter (**New**), edit (**Edit**), or delete (**Delete**) the program director.
- **Program Director Reports To.** You can enter (**New**), edit (**Edit**), or delete (**Delete**) the person to whom the program director reports.
- **Program Personnel Listing.** All other personnel can be managed from this listing of program personnel. You can enter (**New**), edit (**Edit**), or delete (**Delete**) personnel.

Note: After saving a person record, you can click **Create User** to begin the process of giving them access to the program Portal. The person will receive the Portal **Welcome Email** with a link to create their account.

You should only use the **Create User** command if you want the personnel you have entered to be able to access the program Portal.

3. Manage personnel records as needed.

To add personnel

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

Contact	Program General	Sponsoring Institution	Personnel	SCPE Sites	PA Trainees
**Program Director Dr Peter Rabbit User Name: PeterRabbit ericaholiday@arc-pa.org (404) 888-8888 [Edit] [De]					
<input type="text" value="Enter text to search..."/>					
	User Name	Full Name	Standards Required Role		
New Edit Delete	Pending	Mrs Joan Rivers	PA-C Program Faculty		
New Edit Delete	Pending	Ms Wonder Woman	PA-C Program Faculty		
New Edit Delete	Pending	Dr Douglas Howser	Medical Director		

The **Add/Edit Person** dialog box appears:

The screenshot shows the 'Add/Edit Person' dialog box with the following fields and options:

- User Name: Person has no user account.
- Interim Role:
- Portal Access:
- Tabs: Person Detail (selected), Phone #'s, Program Info, Campuses, User Administration.
- Name Prefix * Required: None
- First Name * Required:
- Middle Name:
- Last Name * Required:
- Credentials * Required:
- Institution Title:
- Email * Required:
- Work Address:
- Same As Program Address:
- Address: 1234 Fifth St, Atlanta, GA 20220
- Buttons: Save, Cancel

Tabs separate the information; **Person Detail**, **Phone #s**, **Program Info**, and **Campuses**. The Administrator will also see the **User Administration** tab.

Note: Wait until you have entered information on all four 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. Enter or change these fields on each tab, as necessary.

Person Detail tab

- **Name Prefix.** This is required. Choose **None** if no prefix is desired.
- **Name fields.** The **First Name** and **Last Name** are required.

Note: For the last name, enter only the last name with **no credentials**. For example, for Jane Smith, who is a physician, enter **Dr.** for the name prefix, enter **Smith** for the last name, and enter **MD** in the **Credentials** field. In the Portal, she will be listed as Dr. Jane Smith.

- **Credentials.** Certifications and degrees normally following a person's signature. For example, MS, PA-C, MD, etc. Enter **None** if the person has no certifications or degrees.
- **Institution Title.** Select from the drop-down list. **Do not enter an Institution Title for the program director and medical director.**
- **Email.** This field is required. Email addresses are unique within the Portal. If a person is entered and then deleted, the email address assigned to that person cannot be reused. The Portal keeps a history, and an error will occur. **If a person is deleted and needs to be added back to the Portal, please contact the ARC-PA at portalfeedback@arc-pa.org.**
- **Work Address.** If the work address is the same as the program address, click **Same as program address**. Otherwise, enter the street, city, state, and postal code.

Phone #s tab

The screenshot shows the 'Add/Edit Person' form with the 'Phone #s' tab selected. The form includes a 'User Name' field with a placeholder 'Person has no user account', and checkboxes for 'Interim Role' and 'Portal Access'. Below these are tabs for 'Person Detail', 'Phone #s', 'Program Info', 'Campuses', and 'User Administration'. A note states: '* A primary phone number is required when the Person is assigned a Standards Required Role.' The 'Phone #s' section contains six rows: 'Work', 'Home', 'Mobile', 'Pager', 'Fax', and 'Other'. Each row has a text input field and a radio button labeled 'Is Primary'. At the bottom right are 'Save' and 'Cancel' buttons.

- **Phone Numbers.** You can enter numbers for work, home, mobile, pager, fax or other. Selecting **Is Primary** next to a number displays it in the **Primary Phone** column on the **Personnel** tab. A primary phone number is required for all personnel filling a **Standards Required Role**.

Note: Please use the employee's direct phone number or extension and not a general department phone number as the primary number, so ARC-PA personnel can make contact quickly when it is necessary.

Program Info tab

The screenshot shows the 'Add/Edit Person' form with the 'Program Info' tab selected. The form includes a 'User Name' field with a placeholder 'Person has no user account', and checkboxes for 'Interim Role' and 'Portal Access'. Below these are tabs for 'Person Detail', 'Phone #s', 'Program Info', 'Campuses', and 'User Administration'. The 'Program Info' section contains several fields: 'Standards Required Role' (a dropdown menu with 'None' selected), 'Program Hire Mo/Year', 'Position Start Mo/Year', 'Program Title' (a dropdown menu), 'Program FTE Percent' (a dropdown menu with '0%' selected), 'Academic Title', 'Highest Academic Credential' (a dropdown menu with 'None' selected), and 'Certification/Licensure' (a dropdown menu with 'None' selected). At the bottom right are 'Save' and 'Cancel' buttons.

- **Standards Required Role.** This is the work role of program personnel required by the Standards. Use the drop-down arrow to the right of the field to select the role. These are not the same as the person's title within the program. For personnel who don't have a Standards Required Role, select **None**.

Note: If a person's role is changing, select the **Delete** link associated with the personnel record and use the **Reassign** option. *A person whose role is changing within the program should not be deleted and re-added.*

Note: If a person who was removed previously is returning to the program, please contact the ARC-PA at portalfeedback@arc-pa.org for assistance.

- **Program Hire Mo/Year.** This is the month and year the person started working with the program. This is required by ARC-PA.
- **Position Start Mo/Year.** This is the month and year the person started his or her **current position**. This is required by ARC-PA.
- **Program Title.** The person's exact title. You can select from any of the titles in the drop-down list, or manually enter a different title. This is required by ARC-PA.
- **Program FTE Percent.** The percentage of time working for the program. You can use the up and down arrows at the end of the field to select a percentage or type in the number, for example, 25 for 25%. This is required by ARC-PA.

Note: Program FTE Percent entered here must also be entered on the **Campuses** tab before the information can be saved.

- **Academic Title.** Enter the academic title of the person if applicable.
- **Highest Academic Credential.** The highest degree earned by the person. Use the drop-down arrow to the right of the field to select the credential or leave at **None**. This is required by ARC-PA.
- **Certification/Licensure.** Use the drop-down arrow to the right of the field to select the credential for PAs, physicians, or other licensed health professionals. Leave as **None** for others.

Campuses tab:

The screenshot shows the 'Add/Edit Person' form with the 'Campuses' tab selected. At the top, there are fields for 'User Name' (containing 'Person has no user account'), 'Interim Role', and 'Portal Access'. Below these are tabs for 'Person Detail', 'Phone #'s', 'Program Info', 'Campuses', and 'User Administration'. The 'Campuses' tab is active, showing a 'Primary Campus Location' dropdown menu. A message box states: 'On the Program Info Tab, you indicated that your Program FTE% is 0%. In the grid below, please indicate what portion of time you spend at each campus. All entries must add up to 0%.' Below this is an 'FTE Allocation' table with the following structure:

Campus	FTE Percent
<input type="checkbox"/> (Main) The Best Program Ever Main Campus	0%
<input type="checkbox"/> Best Program Distant Campus 1	0%
<input type="checkbox"/> Campus 2	0%

At the bottom of the form are 'Save' and 'Cancel' buttons.

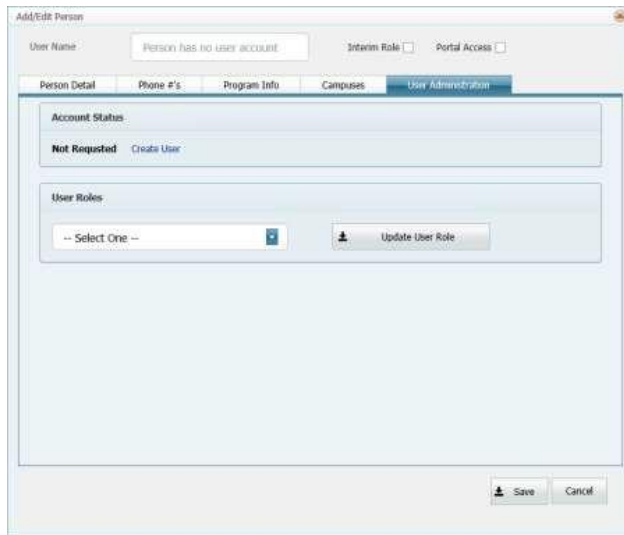
- **Primary Campus Location.** This is the campus where the employee spends the most time. Click the drop-down arrow to change the primary campus for the employee.
- **FTE Allocation.** When a Program FTE Percent is entered on the **Program Info** tab, it also needs to be

allocated among campuses. The sum of the percentages must equal that entered in the **Program FTE Percent** field. For example, if 50% was entered as the Program FTE Percent, and the program has two campuses, the percentages entered for the two campuses could be combinations such as 20 and 30, 10 and 40, 0 and 50, etc., as long as the sum is 50.

Note: If the sum does not add up correctly, a warning symbol (⚠) displays next to **FTE Allocation** until the allocation is correct. A check (✓) displays once correct.

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 User.

To edit personnel

1. From the **Personnel** tab, click **Edit** next to the person you want to edit.

Program Detail

Program Type: Clinical Postgraduate 335 - Z THE BEST POSTGRADUATE PROGRAM

Contact	Program General	Sponsoring Institution	Personnel	SCPE Sites	PA Trainees	Program Budget																																																															
<p>**Program Director</p> <p>Dr Peter Rabbit User Name: PeterRabbit ericaholiday@arc-pa.org (404) 888-8888</p> <p style="text-align: right;">[Edit] [Delete]</p>			<p>**Program Director Reports To</p> <p>Dr Clark Kent clarkkent@bpgp.edu (404) 111-1111</p> <p style="text-align: right;">[Edit] [Delete] [Create User]</p>																																																																		
<p>Enter text to search...</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>User Name</th> <th>Full Name</th> <th>Standards Required Role</th> <th>FTE Percent</th> <th>Interim</th> <th>Program Title</th> <th>Email Address</th> <th>Primary Phone</th> </tr> </thead> <tbody> <tr> <td>New Edit Delete</td> <td>Pending</td> <td>Mrs Joan Rivers</td> <td>PA-C Program Faculty</td> <td>50.00 %</td> <td><input type="checkbox"/></td> <td>Faculty</td> <td>joanrivers@bpgp.org</td> <td>(404) 222-2222</td> </tr> <tr> <td>New Edit Delete</td> <td>Pending</td> <td>Ms Wonder Woman</td> <td>PA-C Program Faculty</td> <td>50.00 %</td> <td><input type="checkbox"/></td> <td></td> <td>wonderwoman@bpgp.org</td> <td>(202) 333-3333</td> </tr> <tr> <td>New Edit Delete</td> <td>Pending</td> <td>Dr Douglas Howser</td> <td>Medical Director</td> <td>10.00 %</td> <td><input type="checkbox"/></td> <td>Medical Director</td> <td>doogehowser@bpgp.org</td> <td>(404) 444-4444</td> </tr> <tr> <td>New Edit Delete</td> <td>BestPGDirector</td> <td>Ms Power Ranger</td> <td>PA-C Program Faculty</td> <td>50.00 %</td> <td><input type="checkbox"/></td> <td>Assistant Director</td> <td>ericaholiday@arc-pa.org</td> <td>(470) 000-0000</td> </tr> <tr> <td>New Edit Delete</td> <td>Create User</td> <td>Dr Bruce Wayne</td> <td>PA-C Program Faculty</td> <td>50.00 %</td> <td><input type="checkbox"/></td> <td>academic coordinator</td> <td>usethesignal@bpgp.org</td> <td>(555) 555-5555</td> </tr> <tr> <td>New Edit Delete</td> <td>Create User</td> <td>Ms Jane Moneypenney</td> <td>Administrative Support Staff</td> <td>100.00 %</td> <td><input type="checkbox"/></td> <td></td> <td>pennysworth@bpgp.org</td> <td>(999) 999-9999</td> </tr> </tbody> </table> <p style="text-align: right;">Export to Excel</p>								User Name	Full Name	Standards Required Role	FTE Percent	Interim	Program Title	Email Address	Primary Phone	New Edit Delete	Pending	Mrs Joan Rivers	PA-C Program Faculty	50.00 %	<input type="checkbox"/>	Faculty	joanrivers@bpgp.org	(404) 222-2222	New Edit Delete	Pending	Ms Wonder Woman	PA-C Program Faculty	50.00 %	<input type="checkbox"/>		wonderwoman@bpgp.org	(202) 333-3333	New Edit Delete	Pending	Dr Douglas Howser	Medical Director	10.00 %	<input type="checkbox"/>	Medical Director	doogehowser@bpgp.org	(404) 444-4444	New Edit Delete	BestPGDirector	Ms Power Ranger	PA-C Program Faculty	50.00 %	<input type="checkbox"/>	Assistant Director	ericaholiday@arc-pa.org	(470) 000-0000	New Edit Delete	Create User	Dr Bruce Wayne	PA-C Program Faculty	50.00 %	<input type="checkbox"/>	academic coordinator	usethesignal@bpgp.org	(555) 555-5555	New Edit Delete	Create User	Ms Jane Moneypenney	Administrative Support Staff	100.00 %	<input type="checkbox"/>		pennysworth@bpgp.org	(999) 999-9999
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2. You can change any of the fields. See the previous section on **To Add Personnel** for a description of the fields.
3. Click **Save** when you are done.

To delete personnel

1. From the **Personnel** tab, click **Delete** next to the person you want to delete. The following dialog box displays:

Delete/Reassign this person

DO NOT DELETE A PERSON if the person is changing roles within the program.

Select the **Resign or Terminate** and enter the date of the change to end this person's role with the program.

Select **Reassign** to keep the person as part of the program, but in a different standards required role or as Program Director Reports To or Chief Administrative Officer.

What is the date of the change?

2/8/2023

Select one of the options below:

Resign or Terminate

Reassign

non PA principal faculty

Save Cancel

Note: Do **NOT** delete a person if they are simply changing roles within the program. Instead, click the Reassign option to change the person's role using the drop-down menu.

Note: If a person who was removed previously is returning to the program, please contact the ARC-PA at portalfeedback@arc-pa.org for assistance.

2. To record a **Resignation or Termination**:
 - a Select the date when the person's position ended. (This can be either in the future or the past.)
 - b Select the **Resign or Terminate** option.
 - c Click **Save**.
3. To **Reassign** a person:
 - a Select the date when the person's position ended. (This can be either in the future or the past.)
 - b Select the **Reassign** option.
 - c From the Role drop-down, select the role that this person should be reassigned to.
 - d Click **Save**.

To Create a User

Important: 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. If you do not want them to be able to access the **Program Portal** and enter data, do not make them a 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:

Contact	Program General	Sponsoring Institution	Personnel	SCPE Sites	PA Trainees
**Program Director Dr Peter Rabbit User Name: PeterRabbit ericaholiday@arc-pa.org (404) 888-8888 [Edit] [Delete]					
<input type="text" value="Enter text to search..."/>					
	User Name	Full Name	Standards Required Role		
New Edit Delete	Create User	Ms Jane Moneypenney	Administrative Support Staff		
New Edit Delete	Pending	Dr Douglas Howser	Medical Director		
New Edit Delete	Pending	Mrs Joan Rivers	PA-C Program Faculty		
New Edit Delete	Pending	Ms Wonder Woman	PA-C Program Faculty		
New Edit Delete	BestPGdirector	Ms Power Ranger	PA-C Program Faculty		
New Edit Delete	Create User	Dr Bruce Wayne	PA-C Program Faculty		

Click on it and this dialog box appears:

Create user account for this person

First Name * Required

Last Name * Required

Security Role

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 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 information needed for accreditation.

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

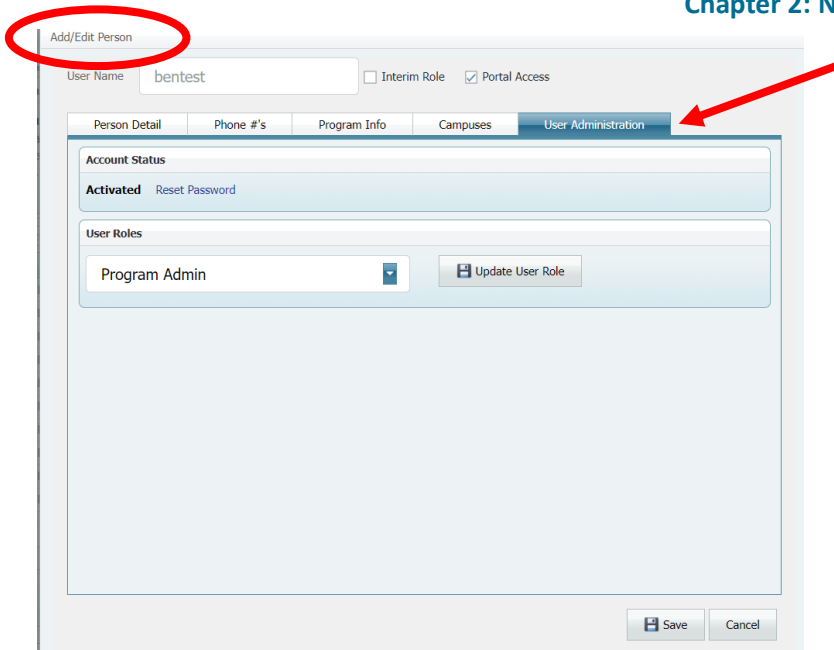
This sends the Portal Welcome email to the person you want to set up as a Portal User. The email instructs the person to click on a link to set up their user account.

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.



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

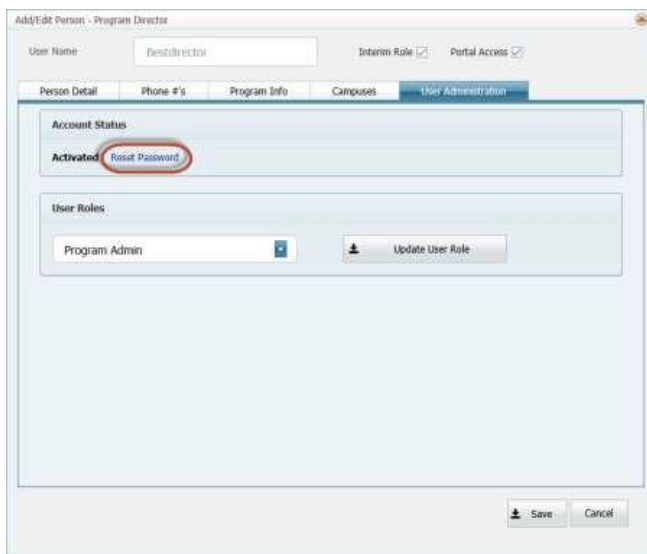
To manage a User

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.

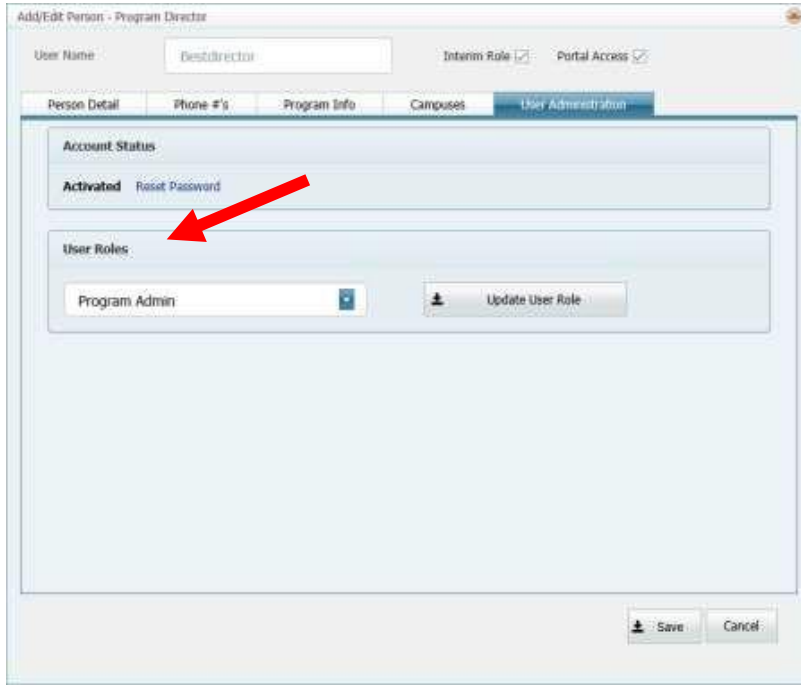


2. A confirmation message will appear if the password reset is successful.

Change Role

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

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



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 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.

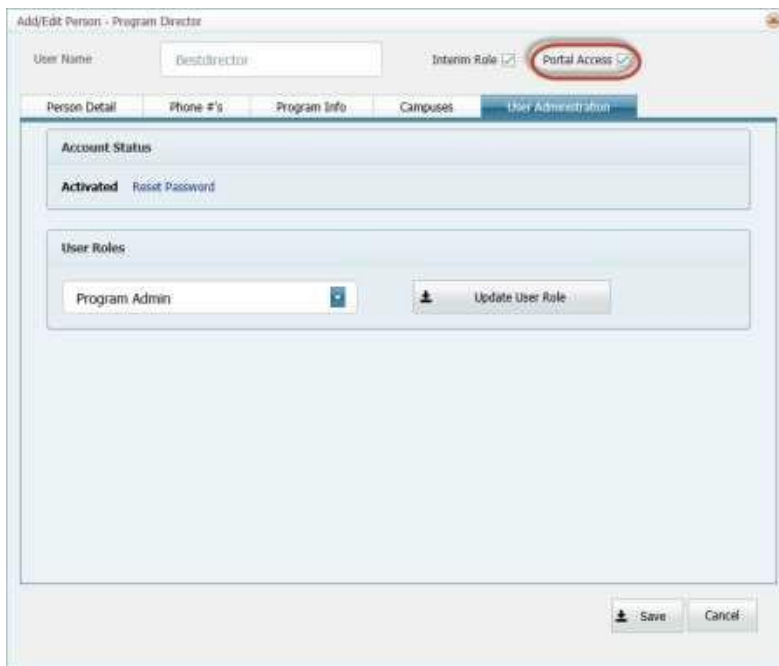
Program Staff--These are the personnel who can edit information needed for accreditation.

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.



2. Select **Save**.

To export a list of personnel to Excel

1. From **Program Detail** select the **Personnel** tab.
2. At the bottom of the page, click the **Export to Excel** button.

The information on the page is exported into an Excel file compatible with Excel 97 and later versions. The file created contains all the information displayed in the columns on the **Personnel** tab.

Note: Any changes you make in the Excel file do not change the personnel information in the Portal. To keep the Excel file up to date, you need to use the **Export to Excel** button each time you change information in the **Personnel** tab of the Portal.

SCPE Sites

1. From **Program Detail** select the **SCPE Sites** tab. You will see the following.

Program Detail

335 - Z THE BEST POSTGRADUATE PROGRAM

Program Type: Clinical Postgraduate

Contact Program General Sponsoring Institution Personnel **SCPE Sites** PA Trainees Program Budget

Enter the supervised clinical practice experience (SCPE) sites used by the program for hospital, clinic, or office settings. Capacity refers to clinical yearly capacity. Mark the Active box for those sites planned for use during the **current clinical phase**.

Enter text to search...

	Site Name	Active	State	Written Agreement	Distance From Main Campus	Clinical Experiences Required of ALL PA Trainees
New Edit Delete	ABC Medical Center	<input checked="" type="checkbox"/>	GA	<input checked="" type="checkbox"/>	1.00	internal med(Capacity = 7), surg(Capacity = 7)
New Edit Delete	St Elsewhere Hospital	<input checked="" type="checkbox"/>	GA	<input checked="" type="checkbox"/>	8.00	surg(Capacity = 2)
New Edit Delete	St. Best Hospital	<input type="checkbox"/>	GA	<input checked="" type="checkbox"/>	15.00	internal med(Capacity = 7)

[Export to Excel](#)

2. You can add, edit, or delete supervised clinical practice experience (SCPE) sites as needed. Those marked **Active** are those sites planned for use during the **current year**. **Capacity** refers to the number of trainees from the current cohort each site has agreed to take.

To enter SCPE sites

1. Click **New** next to any existing SCPE site. The **Add/Edit SCPE Site** dialog box appears.

Add/Edit SCPE Site

Site Name * Required Site State * Required

Active

Written Agreement * Required

Yes No

Clinical Experiences Required of ALL PA Trainees Campuses

Clinical Experiences Required of ALL PA Trainees	Student Capacity
<input type="checkbox"/> behavior & mental	<input type="text"/>
<input type="checkbox"/> elective	<input type="text"/>
<input type="checkbox"/> emerg	<input type="text"/>
<input type="checkbox"/> family med	<input type="text"/>
<input type="checkbox"/> internal med	<input type="text"/>
<input type="checkbox"/> long term care/interprofessional	<input type="text"/>
<input type="checkbox"/> peds	<input type="text"/>
<input type="checkbox"/> Special Care	<input type="text"/>
<input type="checkbox"/> surg	<input type="text"/>

[Save](#) [Cancel](#)

2. Enter the **Site Name** and **Site State**. Do not separately list a single clinical site that offers multiple specialty experiences.

As you enter each site, the Portal will arrange your data alphabetically so for an office setting site with a single provider, it may be appropriate to list that site by the last name of the provider, i.e., Smith, Joe, MD.

3. Mark the site as **Active** if it is currently being used or planned for use during the **current year**.
4. Select **Yes** or **No** next to **Written Agreement** if an agreement for use of the site exists.
5. On the **Clinical Experiences Required of ALL PA Trainees** tab:

Select the check box next to the type of clinical experience(s) offered by the site. Enter the maximum number of trainees the site has agreed to take from the current cohort by entering the number in the **Student Capacity** field, or by using the up and down arrows to the right of the field to select the number.

If your choice of Clinical Experience does not appear, email portalfeedback@arc-pa.org requesting ARC-PA staff add the required type of experience to the Clinical Experiences tab. Only clinical experiences **required by the program for ALL trainees** will be considered for addition to the SCPE tab.

Use the scroll bar on the right side to see all clinical experiences and to add **Student Capacity**.

Note: Clinical experiences that are not required by the program for ALL trainees are considered electives. Electives are not listed by discipline. Enter the trainee capacity number the site will accommodate regardless of the type of elective. For example, if a single site will accommodate 2 trainees in an endocrinology elective and 3 trainees in a cardiology elective, enter the number 5 in **Student Capacity**.

6. Click the **Campuses** tab.

7. Any campus(es) you have entered under the **Program Detail** tab appear here.

8. Enter the distance in miles the SCPE site is from the campus.

Note: At least one campus must be selected. Other campuses are optional.

9. Click **Save** when you are finished.

To edit SCPE sites

1. From **Program Detail** select the **SCPE Sites** tab.
2. Click **Edit** next to the site you want to edit.
3. Edit the fields you want and then click **Save**.

To delete SCPE sites

1. From **Program Detail** select the **SCPE Sites** tab.
2. Click **Delete** next to the site you want to delete. You are asked if you are sure you want to remove the SCPE site from the Portal.
3. Click **OK**. The SCPE site is deleted.

Note: Do not delete sites that may be used in the future; rather, mark these sites inactive to avoid having to re-enter all the data the next time the site is used.

To Export SCPE Information to a Spreadsheet

Note: Make sure that all **SCPE** information is updated before exporting to Excel.

1. From **Program Detail** select the **SCPE Sites** tab.
2. At the bottom of the page, click the **Export to Excel** button.

The information on the page is exported into an Excel file compatible with Excel 97 and later versions. The file created contains all the information displayed in the columns on the **SCPE** tab.

Note: Any changes you make in the Excel file do not change the SCPE information in the Portal. To keep the downloaded Excel file up to date, you need to use the **Export to Excel** button each time you make changes to the **SCPE** tab of the Portal.

3. Edit the downloaded Excel sheet for submission to the ARC-PA following the **SCPE Directions** on the Portal page of the ARC-PA website <https://www.arc-pa.org/portal/>

PA Trainees

1. From **Program Detail**, click the **PA Trainees** tab.

Program Detail

Program Type: Clinical Postgraduate

335 - Z THE BEST POSTGRADUATE PROGRAM

Contact | Program General | Sponsoring Institution | Personnel | SCPE Sites | **PA Trainees** | Program Budget

Annual Stipend/Salary (For entire ARC-PA Accredited Clinical Postgraduate PA Program)

Total Stipend/Salary that each PA trainee is paid while in program:

Total cost of benefits paid for each PA trainee:

Class Information

Maximum Entering Class Size:

Total Number of Graduates from most recent class:

As of Date:

Attrition Rate for the most recent graduating class:

Trainee Enrollment Information

Note: To Manage Campuses, please use the "Contact" tab.

		Trainee Enrollment Per Campus					
	Campus	City	State	Year 1	Year 2	Year 3	Year 4
Edit Enrollment	(Main) Z THE BEST POSTGRADUATE PROGRAM Main Campus	Atlanta	GA	7	0	0	0

Save Tab

2. Enter or change the following information:
 - **Total Stipend/Salary each PA trainee is paid** while in program. This is the salary paid to all trainees. Type the number in the field or use the up and down arrows to the right of the field to change the amount in increments of \$500.
 - **Cost of benefits paid for each PA trainee.** This is the cost of benefits for each trainee (hospitalization, health, disability, and other insurance provided for PA trainees and their families). Type the number in the field or use the up and down arrows to the right of the field to change the amount in increments of \$500.
 - **Maximum Entering Class Size.** Current entering maximum class size number approved by the Commission. This is entered by the ARC-PA and maintained based on Commission decisions.
 - **Total Number of Graduates, from most recent class.** Type the number in the field or use the up and down arrows to the right of the field. Unless your program has no graduates, this should never be zero.
 - **As of date.** Use the calendar selector to indicate the date on which the previous number was entered.
 - **Attrition Rate from the class above.** This is a percentage. Calculate trainee attrition as the number who did not complete the program with their cohort over the total number of trainees who started in the cohort.
 - **Trainee Enrollment per Campus.** Use this section to enter the current number of trainees in each year. Click on edit enrollment. Year 1 = number of trainees currently in the first calendar year of the program. If the program is longer than one year, Year 2 = number of trainees currently in the second calendar year of the program. These numbers will need to change every year.
- 3 Click **Save Tab** when you are finished. Any changes you make on this tab should be reflected after you hit Save at the bottom of the tab.

Note: Enrollment that exceeds Maximum Entering Class Size requires an explanation form <https://www.arc-pa.org/postgraduate-accreditation/change-forms/> to be submitted to the ARC-PA.

To enter the number of trainees per campus

1. Click **Edit Enrollment** next to the campus you want to edit. The **Edit Campus** dialog box appears:

The screenshot shows a dialog box titled "Edit Campus". At the top, it says "Campus Name * Required". Below this is a text input field containing "Z THE BEST POSTGRADUATE PROGRAM Main Campus". Underneath is a section titled "Student Enrollment" which contains a table with four rows and two columns. The first column lists "Year 1", "Year 2", "Year 3", and "Year 4". The second column contains input fields with the values "7", "0", "0", and "0" respectively. At the bottom right of the dialog box are two buttons: "Save" and "Cancel".

Student Enrollment	
Year 1	7
Year 2	0
Year 3	0
Year 4	0

2. Enter the enrollment for each year and click **Save**.

Program Budget

1. From **Program Detail** click the **Program Budget** tab. Note that those in the user role of **Program Staff** do not have access to the **Program Budget** tab.

Program Detail

Program Type: Clinical Postgraduate 335 - Z THE BEST POSTGRADUATE PROGRAM

Contact	Program General	Sponsoring Institution	Personnel	SCPE Sites	PA Trainees	Program Budget	
Source of Budget Assigned to Program							
Line Item						Other (if applicable)	Amount
New							
No budget items entered							\$0
Program Budget Detail							
Filter By Campus: All Campuses							
Line Item						Other (if applicable)	Amount
New Edit Delete faculty salaries and benefits							\$900,000
Campus - Z THE BEST POSTGRADUATE PROGRAM Main Campus							\$900,000
							\$900,000
Export to Excel							

Here you can add, edit, and delete the program budget source lines and budget detail lines. You cannot enter the same line item twice. Program budget detail can be filtered by campus.

To enter Sources of Budget Assigned to the Program

1. Under **Budget Assigned to Program**, click **New**. An empty line item appears:

Add/Edit Budget Item

Line Item * Required Amount

2. Use the drop-down arrow to the right of the field and then scroll down to select the line item you want and enter the amount.
3. If you have scrolled the line items and find the line item you need is not listed, select **other revenue (specify below)** from the **Line-Item** drop-down box. A new field appears:

Add/Edit Budget Item

Line Item * Required Amount

other revenue (specify below)

Other

Enter the description of the line item and the amount.

4. Click **Save** when you are finished.

To enter Program Budget Detail

1. Under **Program Budget Detail**, click **New**. An empty line item appears:

Line Item * Required: [] Amount: \$0.00

Campuses		Amount
Campus		
<input type="checkbox"/>	(Main) Z THE BEST POSTGRADUATE PROGRAM Main Campus	\$0.00

Save Cancel

2. Use the drop-down arrow to the right of the field and then scroll down to select the line item you want and enter the amount in the **Amount** field.

At a minimum, the expenditures included in the **Budget Tab** must include the following, regardless of whether they are budgeted for from the PA Program budget or another departmental/institutional budget:

- Faculty salaries and benefits
- Staff salaries and benefits
- Professional development (CME and maintenance of licensure/certification)
- PA trainee stipend/salary
- PA trainee benefits
- Operations (total program budget less salaries and benefits.)

Note: The **Operations** expenditure line item refers to daily operating expenses such as copying, telephone costs, postage, office supplies, books and software purchased for the program etc.

3. If you have scrolled the line items and find the line item you need is not listed, select **other expenses (specify below)** from the **Line Item** drop-down box. A new field appears.



Line Item * Required: other expense (specify below) Amount: \$0.00

Other: []

Campuses		Amount
Campus		
<input type="checkbox"/>	(Main) Z THE BEST POSTGRADUATE PROGRAM Main Campus	\$0.00

Save Cancel

- Under the **Campus** section, select the campus(es) that uses the line item. Enter the amount of the line item allocated to each campus.

Note: The sum of amounts entered for each campus must equal that entered in the line-item **Amount** field. For example, if \$50,000 was entered as the line-item amount, and the program has two campuses affected by the line item, the amounts entered for the two campuses could be combinations such as \$20,000 and \$30,000, \$10,000 and \$40,000, \$0 and \$50,000, etc. If the sum does not add up correctly a warning symbol  displays next to **Campus**. When the allocation is correct, a check appears .

- Click **Save** when you are finished.

To edit or delete a Budget Source or Detail Line

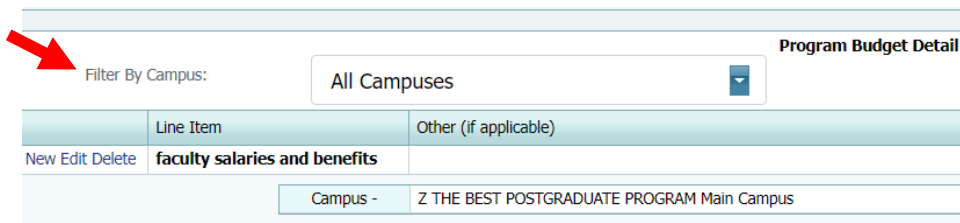
If you need to change the amount of a line item, use the **Edit** and/or **Delete** commands to make changes.

Source of Budget Assigned to Program	
	Line Item
New Edit Delete	clinical practice income
New Edit Delete	endowment
New Edit Delete	federal grants/contracts
New Edit Delete	tuition

- If you need to change an amount for a line item, click **Edit** to change the amount.
- If you wish to eliminate a line item, click **Delete** to remove the line item. (The line item will still be available for future use by clicking the drop- down arrow.)

To filter expenditures by campus

- From **Program Detail** select the **Program Budget** tab.
- In the **Filter by Campus** field, select the drop-down arrow:



Line Item	Other (if applicable)
faculty salaries and benefits	

Campus - Z THE BEST POSTGRADUATE PROGRAM Main Campus

- Select the campus(es) for which you want to view budget detail.
- Click **Close**. The expenditure list is filtered by campus.

To export budget information to Excel

- From **Program Detail** select the **Program Budget** tab.
- Be sure the budget tab is up to date.
- At the bottom of the page, click the **Export to Excel** button.

The information on the page is exported into an Excel file compatible with Excel 97 and later versions. The file created contains all the information displayed in the columns on the **Program Budget** tab.

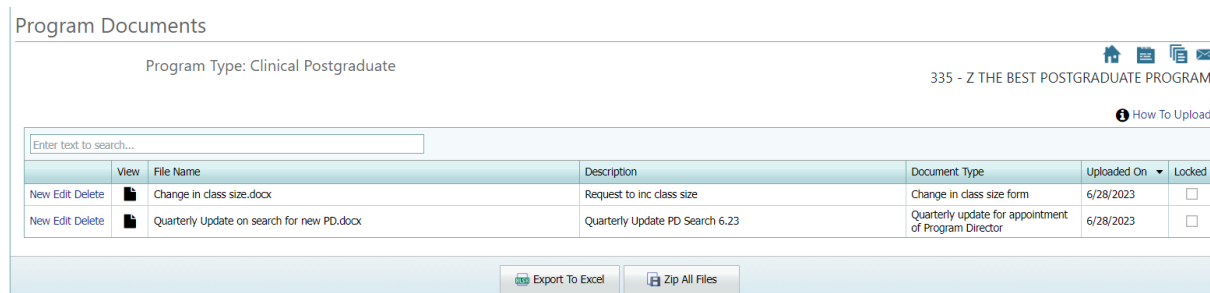
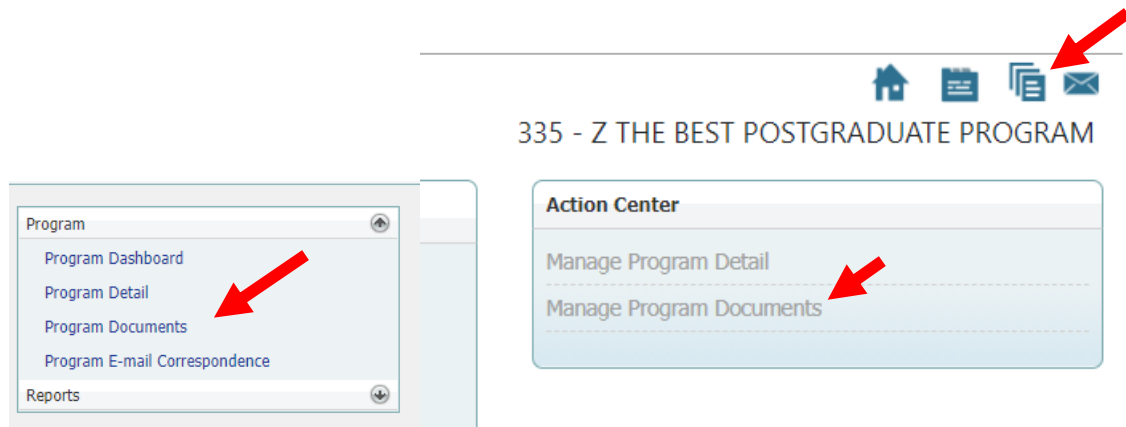
Note: Any changes you make in the downloaded Excel file do not change the program budget information in the Portal. To keep the downloaded Excel file up to date, you need to use the **Export to Excel** button each time you change the information in the **Program Budget** tab.

Working with Documents

The **Program Documents** screen allows programs to share documents securely with the ARC-PA. The ARC-PA can also upload templates that need to be completed by programs.

To Access the Program Documents screen:

1. From the **Program Dashboard** select Program Documents from the menu on the left or the documents icon or link on the upper right.



To upload a document

1. Click **New**. The **Add/Edit Document** dialog box appears:

The 'Add/Edit Document' dialog box contains the following fields and controls:

- Document:** A text input field with a 'Browse...' button.
- Description * Required:** A text input field.
- Document Type * Required:** A drop-down menu with the text '-- Select One --'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

2. Under **Document**, click the **Browse** button to search for the document on your computer.
3. Enter a description that will be seen on the **Documents** page. This description should clearly indicate the purpose of the document.
4. Select the appropriate **Document Type** from the drop-down menu. If you cannot find a corresponding document type in the list, please email ARC-PA at portalfeedback@arc-pa.org to request that a new document type be added.
5. Click **Save** when you are finished.

Note: If the ARC-PA has received previously uploaded documents, those documents will be indicated as "locked" meaning that you can no longer edit them.

To edit a document

1. Click **Edit** next to the document you wish to edit.

Note: You cannot edit documents checked as locked.

The **Add/Edit Document** dialog box appears.

2. You can change the document, description, or type.
3. Click **Save** when you are finished.

To delete a document

1. Next to the document you want to delete, click **Delete**.

Note: You cannot delete documents checked as locked.

2. Click **OK** to confirm the deletion. The document is deleted.

To send the list of documents to Excel

Click **Export to Excel** at the bottom of the **Program Documents** page. This sends the list of documents to an Excel spreadsheet. Any changes you make in the downloaded Excel spreadsheet are not reflected on the **Program Documents** page of the Portal. To keep the list of documents current in Excel, export after adding, editing, or deleting a document on the **Program Documents** page of the Portal.

To zip files

If you ever need to collect all your uploaded files so they can be placed onto a local hard drive, you can:

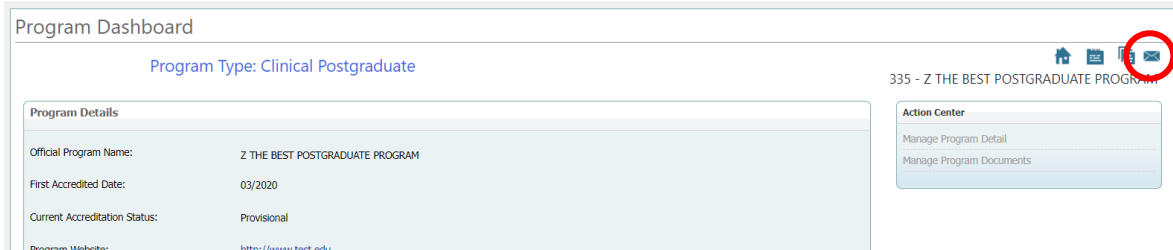
1. Click **Zip All Files** at the bottom of the **Program Documents** page.
2. Click to **Save** the zipped file to your hard drive.

Viewing Program E-mail Correspondence

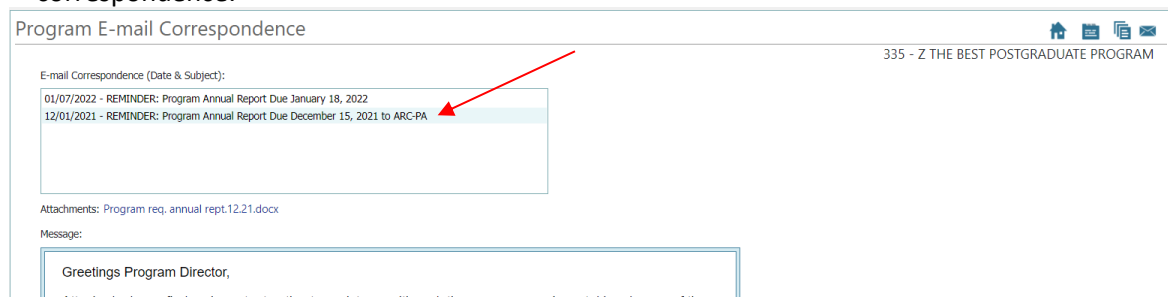
The Program E-mail Correspondence page allows the ARC-PA to share important correspondence with programs. Only those in the program Admin User role see this icon; it does not appear for program staff users.

To Access the Program E-mail Correspondence screen:

- 1 Select the **Program E-mail Correspondence** icon from the upper right of the **Program Dashboard** page.



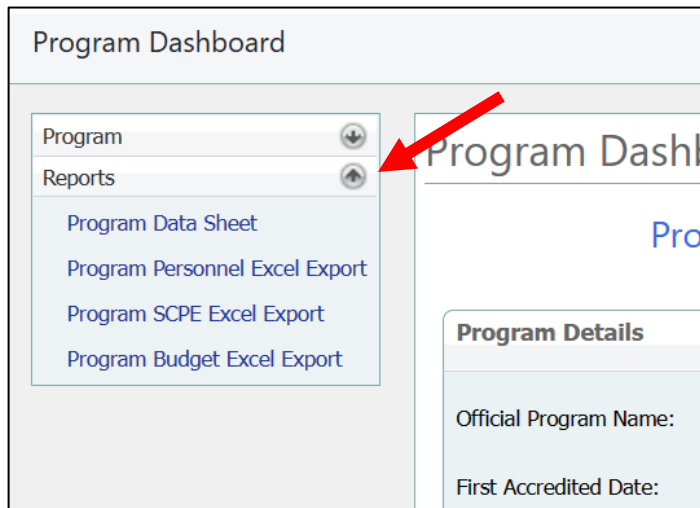
2. To see the text of a message, click on the email you want to read. A text box opens below the list of correspondence:




Note: This page serves as a permanent record of emails you have received from the ARC-PA; emails cannot be deleted from the Portal. A copy of the email, which can be deleted, is sent to your email address. You cannot reply to these emails either from the Portal or from your email.

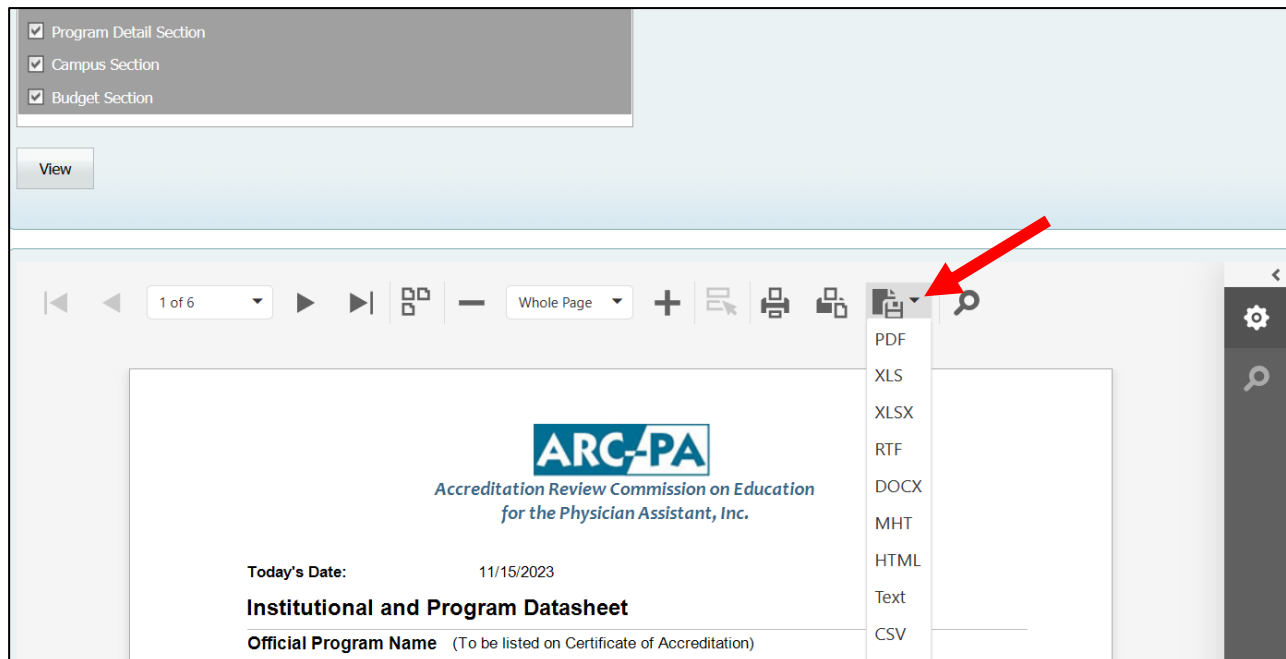
Working with Reports

The following reports are available in the upper left navigation box, under the **Reports** menu option.



Program Data Sheet

1. Click the **Reports** down arrow.
2. Select **Program Data Sheet**. The Program Data Sheet is part of the application, and so it must be downloaded and submitted with the application.
3. Select all of the filters, then click **View**
4. Once the report loads at the bottom of the page it can be exported to numerous different file types (see image below) by clicking on the **export to** icon .
5. Select "pdf". This will download the Program Data Sheet into your downloads folder.



Program Personnel Excel Export

1. Click the **Reports** down arrow.
2. Select **Program Personnel Excel Export**. This report lists all the details from the **Personnel** tab in a Microsoft Excel worksheet.
3. Click **Export**. This creates a Microsoft Excel worksheet containing the data from the **Personnel** Tab of the Portal

Program SCPE Excel Export

1. Click the **Reports** down arrow.
2. Select **Program SCPE Excel Export**. This report lists all the details from the **SCPE** tab in a Microsoft Excel worksheet.
3. Click **Export**. This creates a Microsoft Excel worksheet containing the data from the **SCPE** Tab of the Portal

Program Budget Excel Export

1. Click the **Reports** down arrow.
2. Select **Program Budget Excel Export**. This report lists all the details from the **Program Budget** tab in a Microsoft Excel worksheet.
3. Click **Export**. This creates a Microsoft Excel worksheet containing data from the **Budget** Tab of the Portal.

To save a report for submission to ARC-PA

Note: Make sure your information is up to date in the Portal before creating and submitting a report.

1. From the navigation bar on the left side of the page, click **Reports**.
2. Select the report.
3. Click **Export**.
4. **Save** the report following the directions in the application or document for naming the file.
5. Keep a copy of the report for your records.
6. Submit a copy of the report in the appropriate appendix as directed in the application or report form.