

Management panel

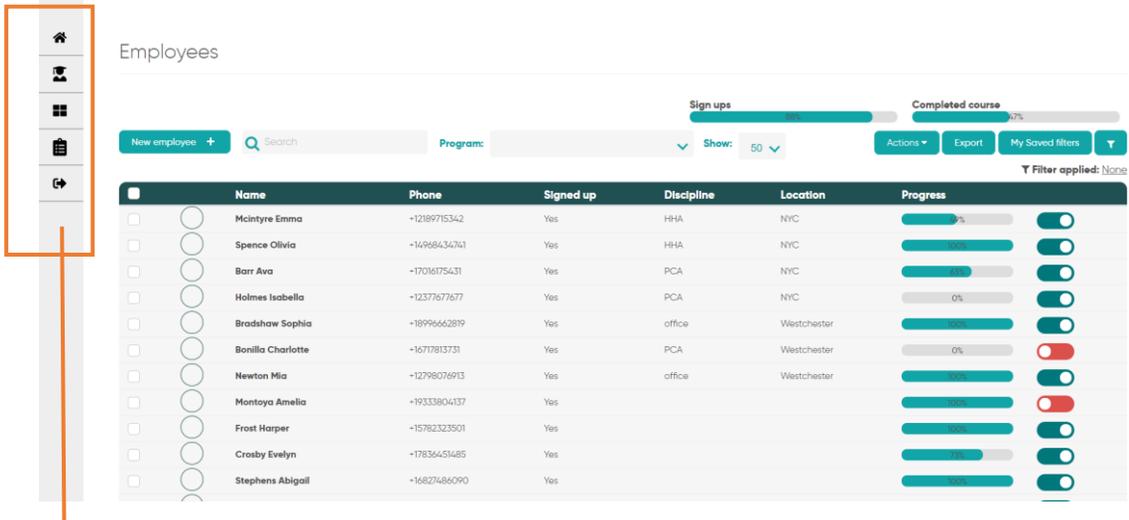
October 2020



Overview

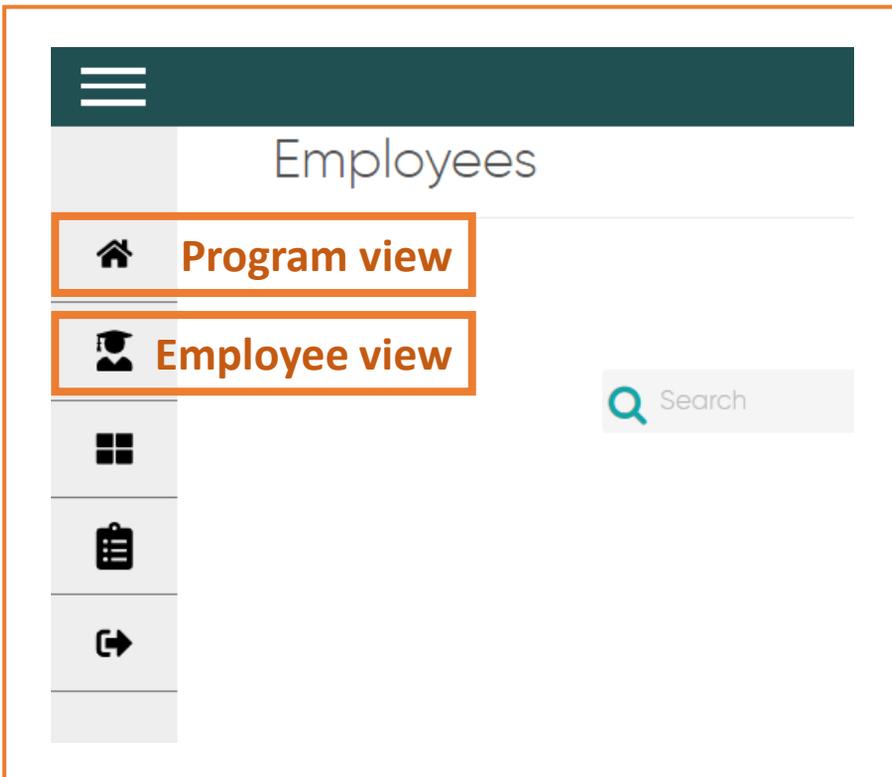
When you log into the panel, you will be directed to our new “Employees” page. You can perform all actions and filter all employees using different fields on this page.

To view by program (just like you did up until today) you can always click the “Home” icon in the menu.



The screenshot shows the 'Employees' page interface. On the left is a sidebar menu with icons for Home, Profile, Grid, List, and Refresh. The main content area features a header with 'Employees', a search bar, and filters for 'Program' and 'Show: 50'. Below this is a table with columns: Name, Phone, Signed up, Discipline, Location, and Progress. The table lists 12 employees with their respective details and progress bars. A 'Filter applied: None' indicator is visible at the bottom right of the table.

Name	Phone	Signed up	Discipline	Location	Progress
Mcintyre Emma	+12189715342	Yes	HHA	NYC	100%
Spence Olivia	+14968434761	Yes	HHA	NYC	100%
Barr Ava	+17018175431	Yes	PCA	NYC	100%
Holmes Isabella	+12371677677	Yes	PCA	NYC	0%
Bradshaw Sophia	+18996662819	Yes	office	Westchester	100%
Bonilla Charlotte	+16172813731	Yes	PCA	Westchester	0%
Newton Mia	+12798076913	Yes	office	Westchester	100%
Montoya Amelia	+19333804137	Yes			100%
Frost Harper	+15782323501	Yes			100%
Crosby Evelyn	+17836451485	Yes			100%
Stephens Abigail	+16827486090	Yes			100%



This screenshot highlights the navigation options on the 'Employees' page. The 'Program view' (indicated by a home icon) and 'Employee view' (indicated by a person icon) are both highlighted with orange boxes. A search bar is visible to the right of these options.

Our new view allows you to view and filter the full list of all your employees.

For example, you can now use the filters to see:

- Who is active (who has access to a program right now) and who is deactivated or “terminated” and can no longer access programs.
- Who has completed any training, which program(s) and what %.

General view (no program chosen/ multiple programs chosen)

Under this view, you can see all employees, regardless to the programs they are assigned to.

	Name	Phone	1 Signed up	2 Discipline	3 Location	4 Progress	5
<input type="checkbox"/>	Mcintyre Emma	+12189715342	Yes	HHA	NYC	89%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Spence Olivia	+14968434741	Yes	HHA	NYC	100%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Barr Ava	+17016175431	Yes	PCA	NYC	63%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Holmes Isabella	+1237677677	Yes	PCA	NYC	0%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Bradshaw Sophia	+18996662819	Yes	office	Westchester	100%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Bonilla Charlotte	+16717813731	Yes	PCA	Westchester	0%	<input type="checkbox"/>
<input type="checkbox"/>	Newton Mia	+12798076913	Yes	office	Westchester	100%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Montoya Amelia	+19333804137	Yes			100%	<input type="checkbox"/>
<input type="checkbox"/>	Frost Harper	+15782323501	Yes			100%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Crosby Evelyn	+17836451485	Yes			73%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Stephens Abigail	+16827486090	Yes			100%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Richard Emily	+14697007599	Yes			100%	<input checked="" type="checkbox"/>

1 Signed up

Has the employee signed up to the Nevvon app/web portal?

2 Discipline and Location

We have added two new fields:

- Location
- Discipline

These will enable you to filter your employees by these fields.

The location and discipline fields will be set by your customer success manager. Please feel free to send us the names of the locations and disciplines you require.

4 Progress

When **no** program is chosen, the progress bar will show what % of **all** their assigned programs (hours) an employee has completed.

5 Active yes/no

Reflects if an employee is active (green) or not (red) on Nevvon. If an employee is “red” they are not active and do not have access to the agency’s programs (“terminated”).

	Name	Phone	Signed up	Discipline	Location	Progress	
<input type="checkbox"/>	Mcintyre Emma	+12189715342	Yes	HHA	NYC	86%	<input type="checkbox"/>
<input type="checkbox"/>	Spence Olivia	+14968434741	Yes	HHA	NYC	100%	<input type="checkbox"/>
<input type="checkbox"/>	Barr Ava	+17016175431	Yes	PCA	NYC	63%	<input type="checkbox"/>
<input type="checkbox"/>	Holmes Isabella	+12377677677	Yes	PCA	NYC	0%	<input type="checkbox"/>
<input type="checkbox"/>	Bradshaw Sophia	+18996662819	Yes	office	Westchester	100%	<input type="checkbox"/>
<input type="checkbox"/>	Bonilla Charlotte	+16777813731	Yes	PCA	Westchester	0%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Newton Mia	+12798076913	Yes	office	Westchester	100%	<input type="checkbox"/>
<input type="checkbox"/>	Montoya Amelia	+19333804137	Yes			100%	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Frost Harper	+15782323501	Yes			100%	<input type="checkbox"/>
<input type="checkbox"/>	Crosby Evelyn	+17836451485	Yes			73%	<input type="checkbox"/>
<input type="checkbox"/>	Stephens Abigail	+16827486090	Yes			100%	<input type="checkbox"/>
<input type="checkbox"/>	Richard Emily	+14697007599	Yes			100%	<input type="checkbox"/>

6 Sign up bar

% of employees that have signed up to Nevvon (out of the employees listed in the current table).

Completion bar

% of employees that have completed all the programs assigned to them (out of the employees in the current table).

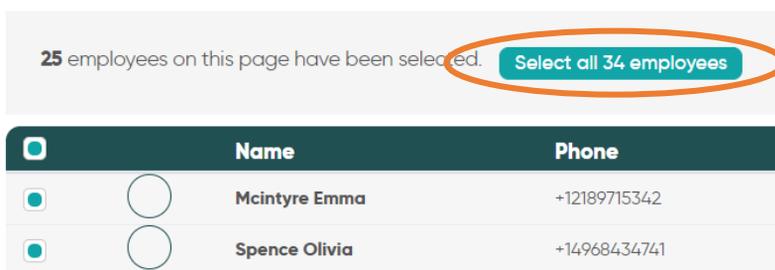
7 Actions

When no program is chosen, you can:

- Activate
- Deactivate
- Add employees to another program
- Export

Just choose the employees you would like to perform the action on and click the action.

Note: Selecting the top check box will only select the employees on the current page. To select all employees click “select all.”



8 Filters

This allows you to filter the list of employees. For example, you can filter by all the active employees who have completed Class 1.

To filter the employee list- click the filters icon

Employees

Sign ups: 21% | Completed course: 8%

New employee + | Search | Program: | Show: 50 | Actions | Export | My Saved filters | **Filter icon**

Filter applied: None

Name	Phone	Signed up	Discipline	Location	Progress
	+1222222244	Yes			100%
test 1	+118102020	No	HHA	block b 1	USER HASN'T SIGNED UP
test 2	+118102021	No	HHA	block b 2	USER HASN'T SIGNED UP
test 3	+118102022	No	HHA	block b 1	USER HASN'T SIGNED UP
test 4	+118102023	No	HHA	block b 2	USER HASN'T SIGNED UP
test 5	+118102024	No	PCA	block b	USER HASN'T SIGNED UP
test 6	+118102025	No	PCA	block b	USER HASN'T SIGNED UP
test 7	+118102026	No	HHA	block b	USER HASN'T SIGNED UP
test 8	+118102027	No			USER HASN'T SIGNED UP
test 9	+118102028	No			USER HASN'T SIGNED UP
test 10	+118102029	No			USER HASN'T SIGNED UP
test 11	+118102030	No	HHA	block b 2	USER HASN'T SIGNED UP
test 1	+11810202000	Yes	HHA	block b 1	100%
test 2	+11810202111	Yes	HHA	block b 2	96%
test 3	+11810202222	Yes	HHA	block b 1	79%

Click here to see all filters

Actions | Export | My Saved filters | **Filter icon**

Filter applied: None

Progress

- 100% [Toggle]
- USER HASN'T SIGNED UP [Toggle]
- 100% [Toggle]
- 94% [Toggle]
- 79% [Toggle]

→

Actions | Export | My Saved filters | X

Filter applied: None

Employees

- Sign up: All
- Agency: All
- Discipline: All
- Location: All
- Hiring date: Pick a date
- Active/NotActive: All
- RN: All
- Learner support: All
- Coordinator: All
- Agency manager: All
- Program: All
- Active/Not active: All
- Completion: [Slider]
- Completion date: Pick a date
- Approval: Pick a date
- Status: All

Program view

In this view, you can see all the employees that are assigned to a specific program or programs.

The screenshot shows the 'Program view' interface. At the top, there are two progress bars: 'Sign ups' at 75% and 'Completed course' at 35%. Below these are buttons for 'New employee +', a search bar, a program dropdown menu (currently showing 'Program: Annual Compliance Training'), a 'Show: 25' dropdown, and buttons for 'Actions', 'Export', and 'My Saved filters'. A filter is applied: 'None'. The main table has columns: Name, Phone, Signed up, Discipline, Location, Progress, Hours left, Status, and Due date. The table contains 8 rows of employee data. Callouts 9, 11, and 12 point to the program dropdown, the 'Actions' button, and the 'Completed course' bar respectively.

Name	Phone	Signed up	Discipline	Location	Progress	Hours left	Status	Due date
Mcintyre Emma	+12189715342	Yes	HHA	NYC	69%	0.94	🕒	01/01/2021
Spence Olivia	+14968434741	Yes	HHA	NYC	100%	0	🕒	01/01/2021
Barr Ava	+17016175431	Yes	PCA	NYC	100%	0	✅ 📄	01/01/2021
Holmes Isabella	+12377677677	Yes	PCA	NYC	0%	1.85	🕒	01/01/2021
Bradshaw Sophia	+18996662819	Yes	office	Westchester	100%	0	✅ 📄	01/01/2021
Bonilla Charlotte	+16717813731	Yes	PCA	Westchester	0%	1.85	🕒	01/01/2021
Newton Mia	+12798076913	Yes	office	Westchester	100%	0	🕒	01/01/2021

9

Program

Filter by one or more programs. When filtering by multiple programs, you will see all your employees that are assigned to at least one of the programs you've selected.

When filtering by one program, you will see only employees that are assigned to that specific program and the view will change to provide more details on the specific program.

10

Completion bar

% of employees that completed the selected program (out of the employees on the current table).

11

Actions

When one program is chosen, you can:

- Activate
- Deactivate
- Add employees to another program
- Download a certificate
- Send a certificate by email
- Send a message (via the Nevvon app)
- Approve completion
- Edit the program's due date
- Export

Just choose the employees you would like to preform the action on and click the action.

Note: Selecting the top check box will only select the employees on the current page. To select all employees click "select all"

The screenshot shows a summary bar at the top of the table: '25 employees on this page have been selected.' Next to it is a button labeled 'Select all 34 employees', which is circled in orange. Below this is the top of the employee table with columns for Name and Phone. The first two rows are visible: 'Mcintyre Emma' with phone '+12189715342' and 'Spence Olivia' with phone '+14968434741'. The first row has a checked checkbox.

Sign ups 9% Completed course 30%

New employee + Search Program: Annual Compliance Training Show: 25 Actions Export My Saved filters Filter None

	Name	Phone	Signed up	Discipline	13	Progress	14	Status	Due date	15
<input type="checkbox"/>	Mcintyre Emma	+12189715342	Yes	HHA	NYC	<div style="width: 0%;"><div></div></div> 0%	0.94		01/01/2021	
<input type="checkbox"/>	Spence Olivia	+14968434741	Yes	HHA	NYC	<div style="width: 100%;"><div></div></div> 100%	0		01/01/2021	
<input type="checkbox"/>	Barr Ava	+17016175431	Yes	PCA	NYC	<div style="width: 100%;"><div></div></div> 100%	0		01/01/2021	
<input type="checkbox"/>	Holmes Isabella	+12377677677	Yes	PCA	NYC	<div style="width: 0%;"><div></div></div> 0%	1.85		01/01/2021	
<input type="checkbox"/>	Bradshaw Sophia	+18996662819	Yes	office	Westchester	<div style="width: 100%;"><div></div></div> 100%	0		01/01/2021	
<input type="checkbox"/>	Bonilla Charlotte	+16717813731	Yes	PCA	Westchester	<div style="width: 0%;"><div></div></div> 0%	1.85		01/01/2021	
<input type="checkbox"/>	Newton Mia	+12798076913	Yes	office	Westchester	<div style="width: 100%;"><div></div></div> 100%	0		01/01/2021	

13

Progress

When one program is chosen, the progress bar on the table will show the % of completion for that program only.

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Status

The employee statuses on this program.

	In progress
	Pending approval
	Approved

15

Active yes/no

Reflects if an employee is active (green) or not (red) on the program chosen.

Note: Deactivating an employees on this page will deactivate them from this program only. To deactivate the employee from all programs, remove the program filter.

Add employee

This option will be available only for users with permission to add employees.

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Name	Phone	Signed up	Discipline	Location	Progress	Hours left	Status	Due date
Mcintyre Emma	+12189715342	Yes	HHA	NYC	99%	0.94	🔄	01/01/2021
Spence Olivia	+14968434741	Yes	HHA	NYC	100%	0	🕒	01/01/2021
Barr Ava	+17016175431	Yes	PCA	NYC	100%	0	✅ 📄	01/01/2021
Holmes Isabella	+12377677677	Yes	PCA	NYC	0%	1.85	🔄	01/01/2021
Bradshaw Sophia	+18996662819	Yes	office	Westchester	100%	0	✅ 📄	01/01/2021
Bonilla Charlotte	+16717813731	Yes	PCA	Westchester	0%	1.85	🔄	01/01/2021
Newton Mia	+12798076913	Yes	office	Westchester	100%	0	🕒	01/01/2021

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New employee

Click to add new employee.

- If the employee is new- the system will ask you to fill in their information and choose a program.
- If the employee is on your system and was deactivated in the past, the system will ask you if you would like to reactivate them. If you choose to do so, make sure to reactivate the relevant programs as well.

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Employee: Emma McIntyre

1. PERSONAL INFO

1. PERSONAL INFO

1. General info

Email: Emma@gmail.com

First name: Emma

Last name: McIntyre

Gender: -

Personal details

Birthday: [Field]

Country code: +1

Mobile number: 2189715342

Preferred language: [Field]

2. EMPLOYEE INFO

2. EMPLOYEE INFO

First name: Emma

Last name: McIntyre

Country code: 1

Cell phone number: 2189715342

RN approving completion*: [Field]

Learner support*: [Field]

Coordinator*: [Field]

Agency manager*: [Field]

Onboard: 1.20

Employee number: XY2123

PROGRAMS + Add

Program Name	Start date	Due date	Progress	Status
Compliance Training Program	2020-01-01	2021-01-01	100%	🔴
Annual Compliance Training	2020-01-01	2021-01-01	99%	🔴

18

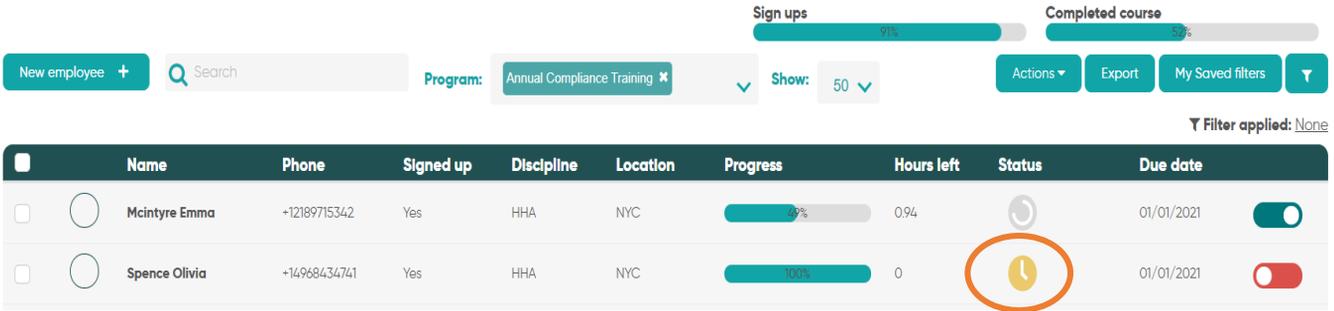
+Add

Use the "+Add" button to add more programs to an existing employee

Approving completion

Once an employee completes the program, an RN is required to approve the completion. The approval process with Nevvon is simple and quick:

1. Once an employee has completed the training, an “awaiting approval” icon  will appear next to their name, in the “status” column

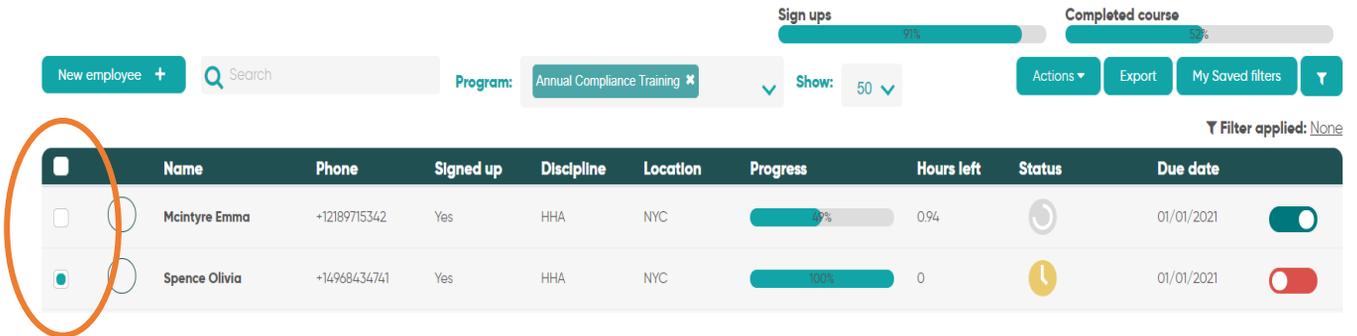


Sign ups: 91% | Completed course: 50%

New employee + Search Program: Annual Compliance Training Show: 50 Actions Export My Saved filters Filter applied: None

Name	Phone	Signed up	Discipline	Location	Progress	Hours left	Status	Due date
Mcintyre Emma	+12189715342	Yes	HHA	NYC	69%	0.94		01/01/2021
Spence Olivia	+14968434741	Yes	HHA	NYC	100%	0		01/01/2021

2. To approve- select this employees you wish to approve or click to select all employees using the check box on the left.

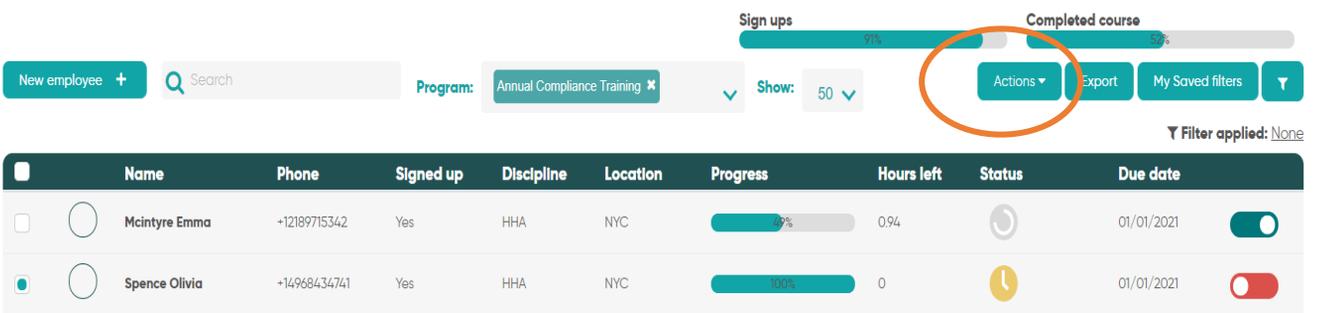


Sign ups: 91% | Completed course: 50%

New employee + Search Program: Annual Compliance Training Show: 50 Actions Export My Saved filters Filter applied: None

Name	Phone	Signed up	Discipline	Location	Progress	Hours left	Status	Due date
<input type="checkbox"/> McIntyre Emma	+12189715342	Yes	HHA	NYC	69%	0.94		01/01/2021
<input checked="" type="checkbox"/> Spence Olivia	+14968434741	Yes	HHA	NYC	100%	0		01/01/2021

3. Go to “action” and click to approve. Note that even if you choose employees that are not completed yet, the system will approve only those who have completed.

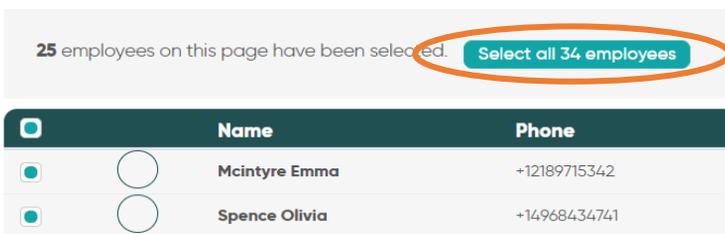


Sign ups: 91% | Completed course: 50%

New employee + Search Program: Annual Compliance Training Show: 50 Actions Export My Saved filters Filter applied: None

Name	Phone	Signed up	Discipline	Location	Progress	Hours left	Status	Due date
<input type="checkbox"/> McIntyre Emma	+12189715342	Yes	HHA	NYC	69%	0.94		01/01/2021
<input checked="" type="checkbox"/> Spence Olivia	+14968434741	Yes	HHA	NYC	100%	0		01/01/2021

Note: Selecting the top check box will only select the employees on the current page. To select all employees click “select all”



25 employees on this page have been selected. [Select all 34 employees](#)

Name	Phone
<input checked="" type="checkbox"/> McIntyre Emma	+12189715342
<input checked="" type="checkbox"/> Spence Olivia	+14968434741

Downloading a certificate

Make sure the employees' completion is approved

To download an individual employee certificate, click on the "download" icon under the "status" column

Phone	Signed up	Discipline	Location	Progress	Hours left	Status	Due date
+12189715342	Yes	HHA	NYC	99%	0.94	🔄	01/01/2021
+14968434741	Yes	HHA	NYC	100%	0	🕒	01/01/2021
+17016175431	Yes	PCA	NYC	100%	0	✅ ⬇️	01/01/2021

To download multiple certificates:

- Select the employees you wish to download the certificate for or click to select all employees using the check box on the left.
- Go to "action" and click to download certificate.

<input type="checkbox"/>	Name	Phone	Signed up	Discipline	Location	Progress	Hours left	Status	Due date
<input type="checkbox"/>	Mcintyre Emma	+12189715342	Yes	HHA	NYC	99%	0.94	🔄	01/01/2021
<input type="checkbox"/>	Spence Olivia	+14968434741	Yes	HHA	NYC	100%	0	🕒	01/01/2021
<input checked="" type="checkbox"/>	Barr Ava	+17016175431	Yes	PCA	NYC	100%	0	✅ ⬇️	01/01/2021

Note: Selecting the top check box will only select the employees on the current page. To select all employees click "select all"

25 employees on this page have been selected. [Select all 34 employees](#)

<input checked="" type="checkbox"/>	Name	Phone
<input checked="" type="checkbox"/>	Mcintyre Emma	+12189715342
<input checked="" type="checkbox"/>	Spence Olivia	+14968434741