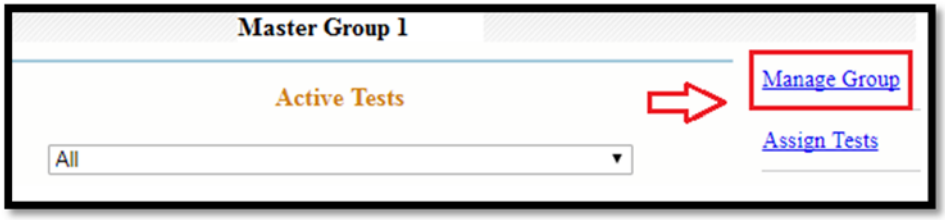
How to Fill in Accreditation Information by a Master Group

This guide explains how to enter in Accreditation information for all active tests claimed by users within a Master Group and Sub-Groups. It also explains how the electronic signing of release to Accreditation feature works.

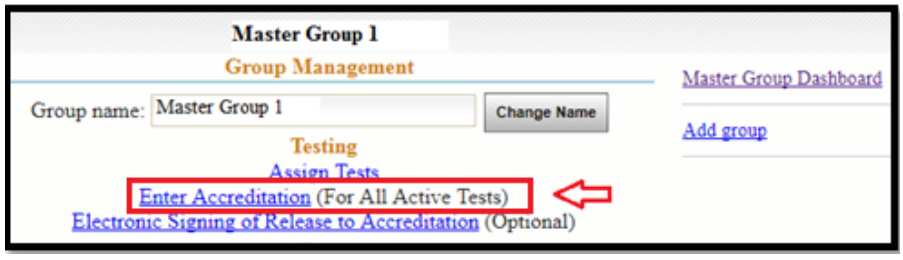
Click on "My Groups", on the left hand side under “Data Entry”. Click on "Master Group Dashboard" under the Master Group.

To Complete Accreditation in Bulk for All Active Tests

Click on "Manage Group" located on the right hand side of the Master Group Dashboard.



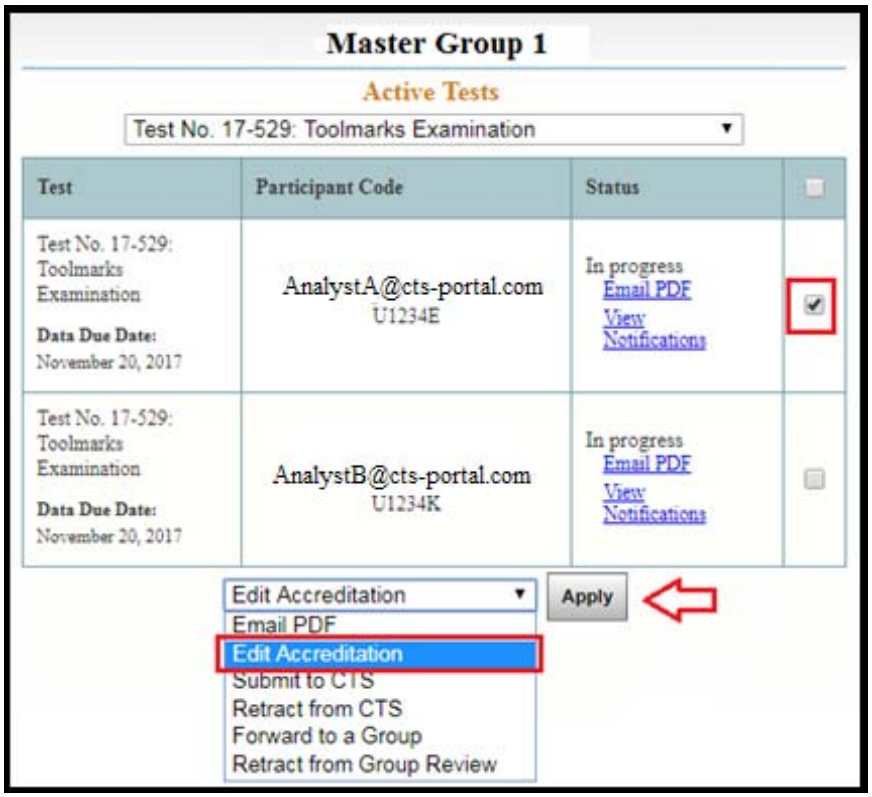
Click on "Enter Accreditation" listed under the Testing Section.



This will take you to the accreditation completion page detailed below.

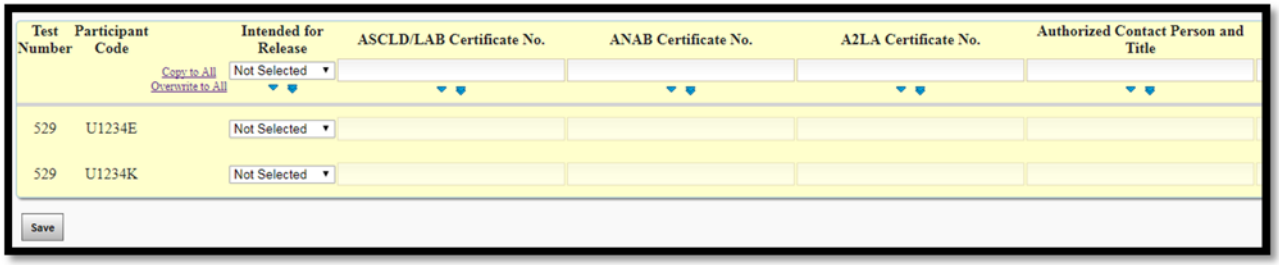
To Complete Accreditation for Select Tests/Users

Place a check in the right column for the tests/users you would like to edit accreditation for, select "Edit Accreditation" from the drop down list below the Active Tests, and click the Apply button.

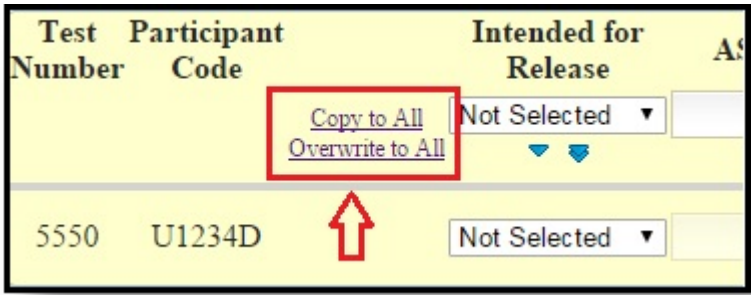


Accreditation Completion Page

A page will open that lists all assigned tests along with fields for the accreditation information. You can fill out information on the top row when you want to fill out several tests at once. If you are only filling out information for a particular test, fill out the fields in the row of that test.

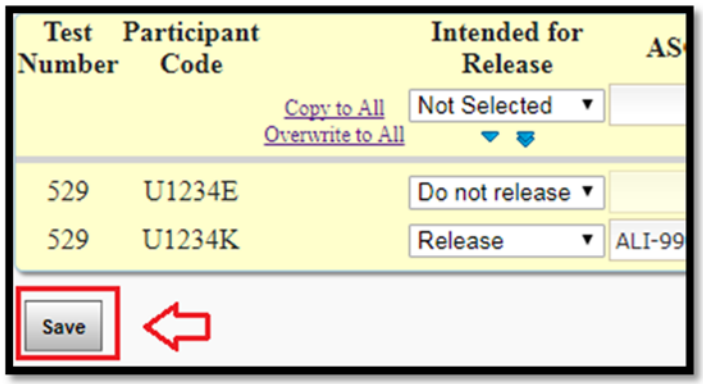


To complete multiple entries at the same time, fill in the information on the top row. Once all necessary information is filled in, click on either "Copy to All" or "Overwrite to All." "Copy to All" copies all the values in the top line to all empty rows, preserving any already entered values. "Overwrite to All" copies all the values in the top line to all rows, overwriting any already entered values.



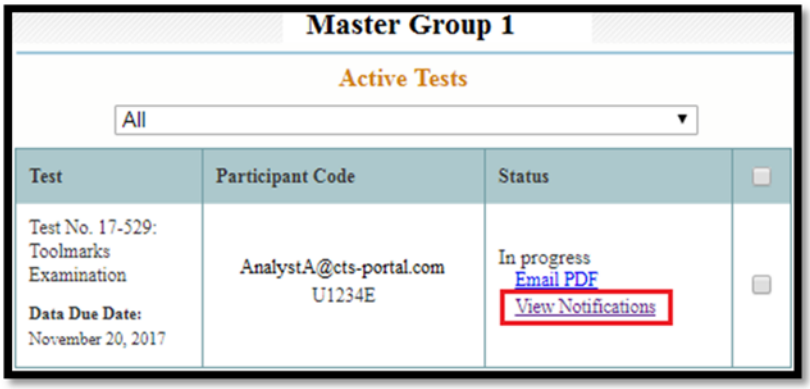
If you only want a certain column of information copied to additional rows, click on either the blue single arrow or the blue double arrow below the field you wish to copy. This is useful for a column that was incorrect and you just want to copy that particular column to the tests below. The single arrow copies the value down to all empty fields; it does not overwrite any pre-existing values. The double arrow copies the values to all fields, overwriting all pre-existing values.

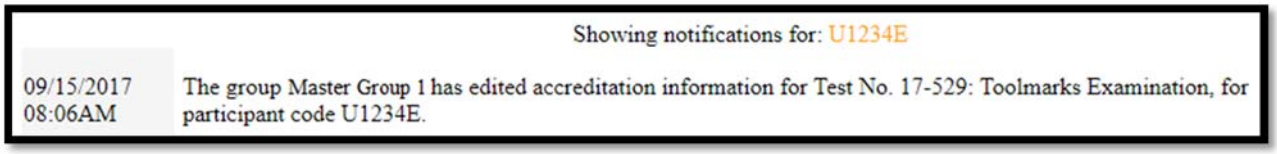
Once all information is finished, click on the "Save" button.



If you complete the Accreditation in Bulk through the Group Management page, you will receive the following notification that the Accreditation has been updated.

The completion of accreditation through the Master Group Dashboard for select tests/users will not show a confirmation message, but you can view the notifications for that test/user and see the completion of accreditation listed.



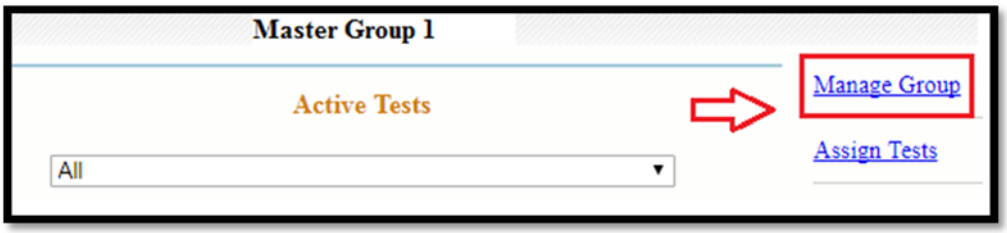


Electronic Signing of Release to Accreditation (optional)

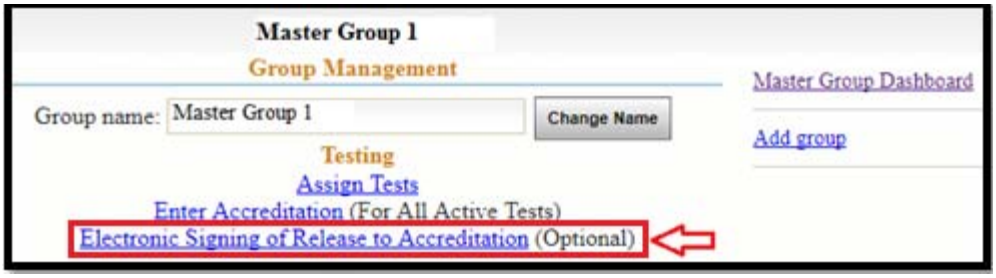
This feature is used to have e-mail confirmation that the Master Group Manager filled out the Accreditation page. It adds an extra step to filling out the Accreditation page.

Click on "My Groups" on the left hand side under “Data Entry”. Click on "Master Group Dashboard" under the Master Group.

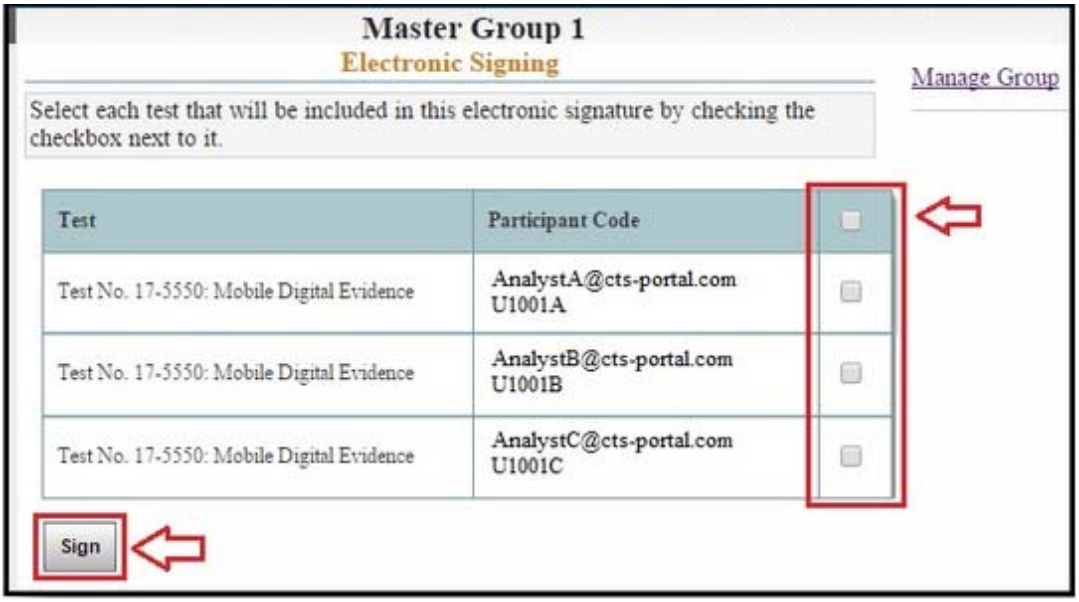
Click on "Manage Group" located on the right hand side of the Master Group Dashboard.



Click on "Electronic Signing of Release to Accreditation" listed under the Testing Section.

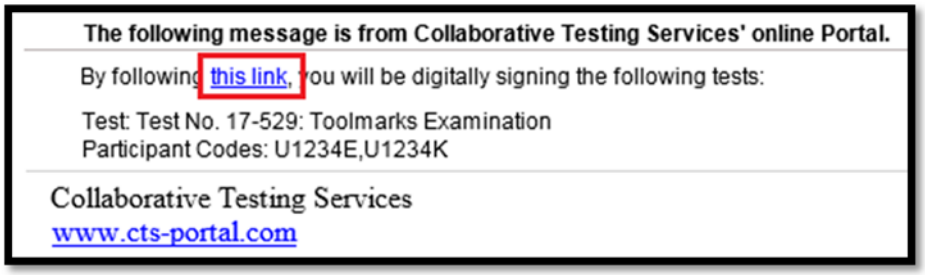


The Electronic Signing page will open. Click on the box right next to each test you would like to perform the electronic signature activity. Once all necessary tests are chosen, click on the "Sign" button.

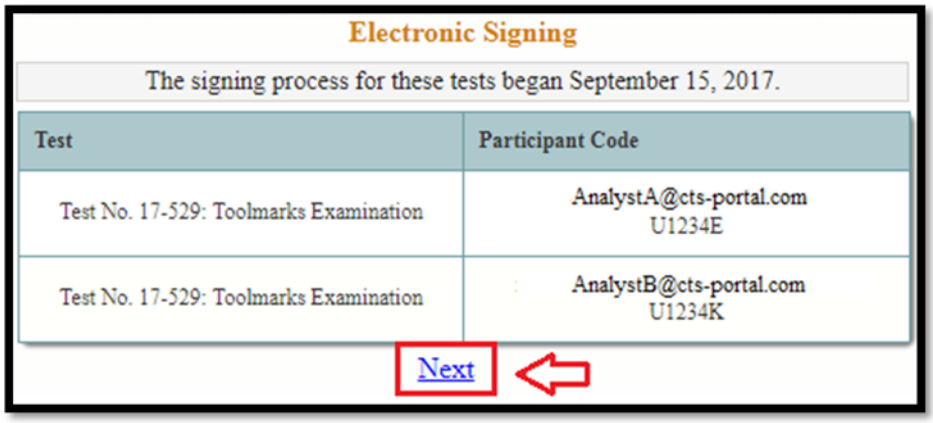


A confirmation message will be displayed.

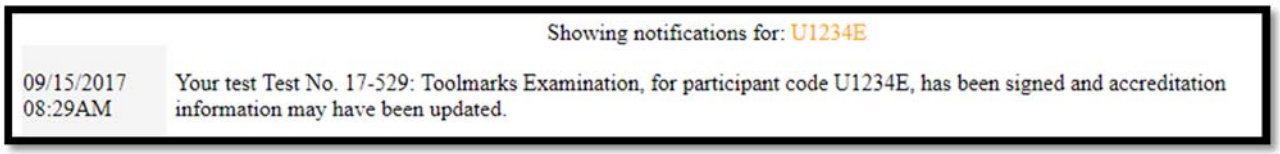
Once you receive the e-mail from the Portal, follow the directions provided to complete the electronic signing process.



The link will take you to the Electronic Signing page. Click on "Next."



The Enter Accreditation page will open for you to enter, edit, or review as described above. Once completed, click on the “Save” button.

A confirmation message will be shown on the screen.

And a new notification is logged to this test to indicate it was electronically signed.