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**Chronic Disease Competencies Assessment Tool**

**Manager Instructions**

If you have questions about the tool or need technical assistance, please email [info@chronicdisease.org](mailto:info@chronicdisease.org).

**To enter the manager tools for the first time:**

1. Click this link: [**https://tools.chronicdisease.org**](https://tools.chronicdisease.org/) and choose the Manager Portal.
2. Choose the Create Account option. Enter your email address and a password of your choice.
3. Please remember your password. Once you’ve done that, click SUBMIT.

**To create a team:**

1. Click Team Management to expand the team management tabs on the left menu and click Create Team.
2. Think up a team name and then type the name into the “Team Name” box.
3. Click the Submit button below the box.
4. You may choose to email this team name to other team members later if you would like them to join the team after they create their own account.
5. If you know other employees have already created their account and you would like to add them to the team, click the add employees button. See instructions below for adding employees to the team.

**To add employees and manage your team:**

1. Click Team Management to expand the team management tabs if they are not already open on the left menu and click Add Person to Team.
2. Type the email of the person you are adding to the team into the “Type email” box.
3. Click the “Select team” drop down menu arrow, then select the appropriate team from the list of teams you manage.
4. If the person you are adding is an employee, leave the “Select team” role dropdown menu as the default “employee”. Otherwise select the appropriate role from the dropdown menu.
   * An employee will be able to see their own results on the team and any manager assessments of them. They will not see other employee assessments.
   * A manager will be able to view and download all results of the team and assess any people on the team.
   * A team manager will have permission to add any existing accounts to the team.
   * A team leader has all the manager capabilities, plus the ability to change permissions of others on the team. By default, only the person who created the team is the team leader.
5. Click Submit at the bottom of the form to add the existing person to your team.
   * If you receive a “Values in one or more fields are invalid.” error, the email does not exist in the system and the person will need to create their account first.
6. If you need to change the permissions of anyone on your team, click Edit Team Permissions on the left-hand menu.
7. Select the appropriate team from the “Select team” drop-down menu.
8. Then choose the person’s email from the “Select email” drop-down menu.
9. Click the Search button and then click the Edit pencil on the right hand of the table result.
10. Below “Set Role Level” click the drop-down menu and choose the new appropriate role for the person then click the Update button.
11. You may view the person’s newly assigned role under the “Current Role” text.

**To review employees who have completed data:**

1. Click View Assessments to review the assessment and plan completed by an employee.
2. Choose an employee email from the drop down menu and click Search. This will show an individual view of their previously completed assessment – you will see their self-ratings and the professional development plan they completed.
3. You may wish to export this result to refer to when completing the assessment and manager portion of the professional development plan for the employee. The export will be in Excel.
4. To provide a Manager Assessment of this employee, click Assess Employee in the menu on the left side of the screen.
5. Scroll down to Select person to assess and choose the employee whose data you just reviewed.
6. Enter ratings for the 52 items for that employee. Each item must have a radio button chosen.
7. When you’re finished, click Submit at the bottom of the page.
8. To add notes to the Manager Assessment you just completed, click Add Notes in the left menu or use the link on the page accepting your successful assessment completion.
   * If you chose Add Notes in the left menu, ensure the Team Name is in the Dropdown Menu and select the employee email in the next drop down mean and click Search.
9. You will see the assessment you just completed for the employee. Above the Assessment Date, click Add Notes.
   * You may enter notes as you see fit. Scroll to the bottom and click Update to save.
10. **For other employees in your team, please go back to step 1 and complete the steps again.**

**Once you have assessed your employees, the next step is to review your team:**

1. Click Download Team Data in the menu to the left.
2. In the Teams window, click the team name. Ensure it is highlighted in blue, then click Search.
3. You can review each assessment on this screen by scrolling right or you can click Download Data under the section title “View and download team data” to review the data in Excel.