



**INFORMATION
TECHNOLOGY**
Canada and Bermuda Territory

ARMS

User Handbook

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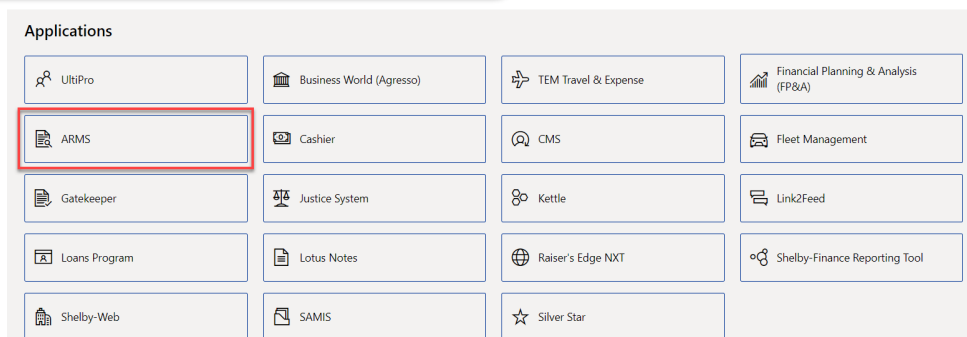
Overview

The Accreditation Review Management System (ARMS) Program is used to manage, schedule, and monitor the Social Services accreditation process. The Salvation Army's internal accreditation process provides an assessment of social service ministry units using standards which reflect organizational policy, legislative requirements, and best practices. These standards describe processes and systems in the areas of governance, employee relations management, facility management, spiritual and religious care, and program delivery.

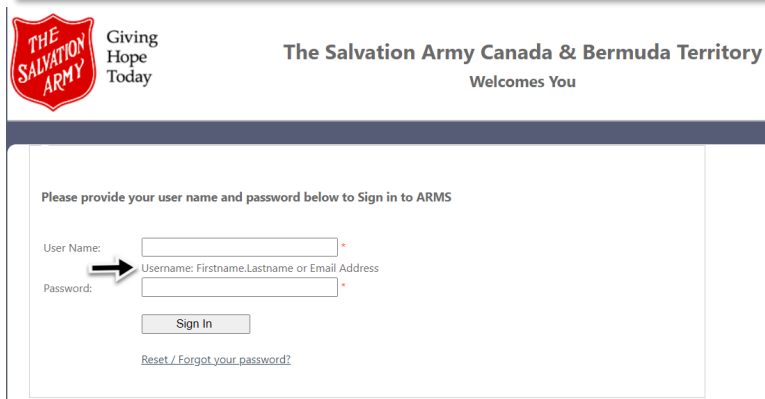
The program is accessible via a secure internet connection through a server located at THQ.

Logging On

1. Open My Army > <http://myarmy.can.salvationarmy.org>
2. Scroll down to Applications
3. Click on the ARMS tile



4. Type your username
Your username has two format options: [Firstname.Lastname](#) or [Email address](#)
5. Type your password
Your password is the same as you use to log in on your computer/laptop
6. Click Sign In

A screenshot of the ARMS login page. At the top left is the Salvation Army logo with the text 'Giving Hope Today'. The main header reads 'The Salvation Army Canada & Bermuda Territory Welcomes You'. Below this is a white login box with the instruction 'Please provide your user name and password below to Sign in to ARMS'. It contains two input fields: 'User Name:' and 'Password:'. A red arrow points to the 'User Name:' field with the text 'Username: Firstname.Lastname or Email Address'. Below the fields is a 'Sign In' button and a link for 'Reset / Forgot your password?'.

The Banner

The common functions for ARMS are contained in the top banner (as shown below).



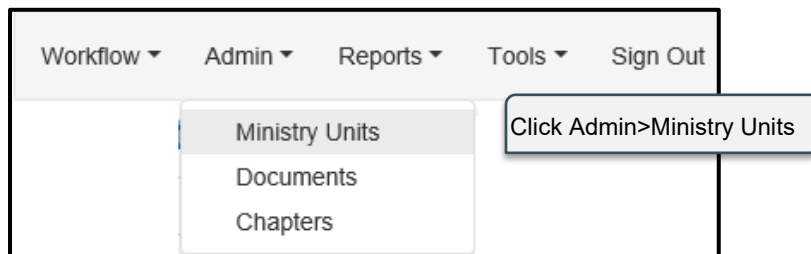
User Access Levels

There are several levels of access within ARMS for various users; users with different roles and responsibilities for the review will have access to different menu items.

Access Level	Roles
ARMS Coordinator	<ul style="list-style-type: none"> • THQ social services personnel • Oversees TSA Social Services Accreditation Review Program including rating, submit, approve, release review and approve action plan after proposed by MU • Schedules reviews, assigns chapters for reviews, selects review team and assigns chapters to reviewers • In charge of all maintenance functions of the application (chapters maintenance, review configuration maintenance, review document maintenance, & application maintenance)
Review Scheduler	<ul style="list-style-type: none"> • THQ social services Personnel • Schedules reviews • Views and updates schedule tracking procedure
Team Leader	<ul style="list-style-type: none"> • THQ social services personnel • Manages the accreditation review process cycle for accreditation reviews of ministry units that have been assigned to them • View documents submitted by MU • Able to re-select review team and reassign chapters to reviewers • Submits and approves completed ratings for reviews assigned to them
Area Commander/Divisional Social Services Secretary	<ul style="list-style-type: none"> • DHQ personnel • Review team member for reviews of ministry units that are under their jurisdiction • Submit completed ratings for chapters assigned • Approves & monitors resulting action plans; DHQ may also assign another DHQ approver for the action plan
Reviewer	<ul style="list-style-type: none"> • Submits completed ratings for chapters assigned to them • Views documents submitted by MU
MU Personnel	<ul style="list-style-type: none"> • Manages all documents and information that are required for their accreditation review process • Downloads template documents • Submits required documents prior to the accreditation review • Responsible for the development of the corresponding action plan resulting from the review

MU Management

In order for Ministry Units to appear in the Review Process Review List, the ministry unit must be active. The ARMS Coordinator is the only person who can activate or deactivate a Ministry Unit for the review list.



Search for Ministry Unit

To locate a ministry Unit in the list, you will need to search for the Ministry Unit. You can search for Ministry Unit based on MU Name, Address, City, Postal Code or Division. You can limit the display list by selecting to display all MUs, ARMS Only, and SAMIS Only selected. You can search using one field or using multiple fields; you can use part of words or entire words.

All – displays all ministry units within the territory

ARMS Single – displays ministry units that have been selected for accreditation review

ARMS Grouped – displays Ministry Units that have been grouped as one entity

SAMIS Only – displays list of ministry units that have not been selected for accreditation review

Example of search using ARMS criteria SAMIS Only

Ministry Units

All
 ARMS (Single)
 ARMS (Grouped)
 SAMIS Only

Name <small>(Grouped MUs)</small>	Address	City	Postal Code	Division	ARMS	Name(SAMIS)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All	<input type="checkbox"/>	<input type="text"/>
The Oasis Centre	415 PICKERING	Middelfort	L3Y 8G8	Ontario Central-East Division	<input type="checkbox"/>	The Oasis Centre
Golden Years Home	51 MORROW	Edgecombe	R2M 1A5	Prairies Division	<input type="checkbox"/>	Golden Years Home
Destiny Community Church	555 HOMER	Conquest	Y6B 1K8	British Columbia Division	<input type="checkbox"/>	Destiny Community Church
Genesis CFS	295 PINNACLE	Sedona	K8N 3B3	Ontario Central-East Division	<input type="checkbox"/>	Genesis CFS

Example of search using single criteria and filter for SAMIS Only selected

Ministry Units

All
 ARMS (Single)
 ARMS (Grouped)
 SAMIS Only

Type into desired search field
Press ENTER on your keyboard

Name <small>(Grouped MUs)</small>	Address	City	Postal Code	Division	ARMS	Name(SAMIS)
<input type="text"/>	<input type="text"/>	Sedona	<input type="text"/>	All	<input type="checkbox"/>	<input type="text"/>
The Oasis Centre	415 PICKERING	Sedona	L3Y 8G8	Prairies Division	<input type="checkbox"/>	The Oasis Centre
Golden Years Home	51 MORROW	Sedona	R2M 1A5	Prairies Division	<input type="checkbox"/>	Golden Years Home

Example of search using multiple criteria and filter for SAMIS Only selected

Ministry Units

All
 ARMS (Single)
 ARMS (Grouped)
 SAMIS Only

Type into desired search field
Press ENTER on your keyboard

Name <small>(Grouped MUs)</small>	Address	City	Postal Code	Division	ARMS	Name(SAMIS)
<input type="text"/>	Pickering	Sedona	<input type="text"/>	All	<input type="checkbox"/>	<input type="text"/>
The Oasis Centre	415 PICKERING	Sedona	L3Y 8G8	Prairies Division	<input type="checkbox"/>	The Oasis Centre

Activate MU

To find an inactive Ministry Unit, use the filter for SAMIS Only. Locate the desired Ministry Unit using search criteria and click to activate the Ministry Unit so that it is available and visible in the Workflow, Reviews display list.

Ministry Units

All
 ARMS (Single)
 ARMS (Grouped)
 SAMIS Only

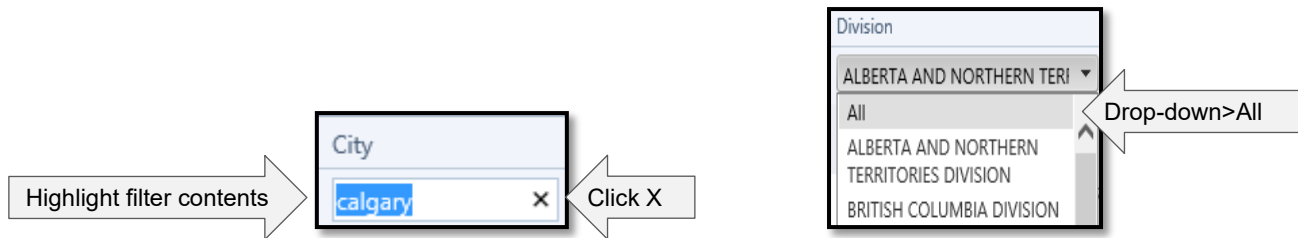
Click check box to activate MU for review

Name <small>(Grouped MUs)</small>	Address	City	Postal Code	Division	ARMS	Name(SAMIS)
<input type="text"/>	<input type="text"/>	Sedona	<input type="text"/>	All	<input type="checkbox"/>	<input type="text"/>
The Oasis Centre	415 PICKERING	Sedona	L3Y 8G8	Prairies Division	<input type="checkbox"/>	The Oasis Centre
Golden Years Home	51 MORROW	Sedona	R2M 1A5	Prairies Division	<input checked="" type="checkbox"/>	Golden Years Home

ARMS

Remove Ministry Unit Filter

To remove the filter, you can highlight the contents of the filter, and press Delete on the keyboard, or you can click the x in the filter field. Then press Enter on keyboard. Likewise, to reset a drop-down filter, you can click drop-down and select All.



Remove Ministry Unit from Review List

1. Locate the desired Ministry Unit using search criteria outlined above in Search for Ministry Unit
2. Click to uncheck the desired Ministry Unit to remove from the MU review list

MU Name	Address	City	Postal Code	Division	ARMS	MU Name(SAMIS)
				All		
The Healing Centre		ALOUETTE	GOV 1A4		<input checked="" type="checkbox"/>	The Healing Centre
Home Value Residence	390 Main St.	VANCOUVER	V6A 2T1	British Columbia Division	<input checked="" type="checkbox"/>	Home Value Residence
Wellspring Drop-in Centre	114 Mill	ACTON	L7J 2M4	Ontario Great Lakes Division	<input checked="" type="checkbox"/>	Wellspring Drop-in Centre

Click to remove

Change Ministry Unit Name

The Ministry Unit names and locations are drawn from SAMIS. The ARMS Coordinator can change the name of a Ministry Unit to better reflect the actual Ministry Unit name if required.

Click Admin>Ministry Units

Name	Address	City	Postal Code	Division	ARMS	Name(SAMIS)
				All		
Northern Lights CFS	130 Meilong Road	Monterrey	L3Y 8G8	Ontario Central-East Division	<input type="checkbox"/>	Northern Lights CFS
Discovery Women's Centre		Tepic	R2M 1A5	Prairies Division	<input checked="" type="checkbox"/>	Discovery Women's Centre
Lifebridge Community Church	1041 Shensi Blvd	Durango	V6B 1K8	British Columbia Division	<input type="checkbox"/>	Lifebridge Community Church

Click x to remove current MU Name

Name	Address	City	Postal Code	Division	ARMS	Name(SAMIS)
				All		
Northern Lights CFS	130 Meilong Road	Monterrey	L3Y 8G8	Ontario Central-East Division	<input type="checkbox"/>	Northern Lights CFS
New Woman Hub		Tepic	R2M 1A5	Prairies Division	<input checked="" type="checkbox"/>	Discovery Women's Centre
Lifebridge Community Church	1041 Shensi Blvd	Durango	V6B 1K8	British Columbia Division	<input type="checkbox"/>	Lifebridge Community Church

Type new MU Name

You will get a confirmation message of the new name.

Ministry Units

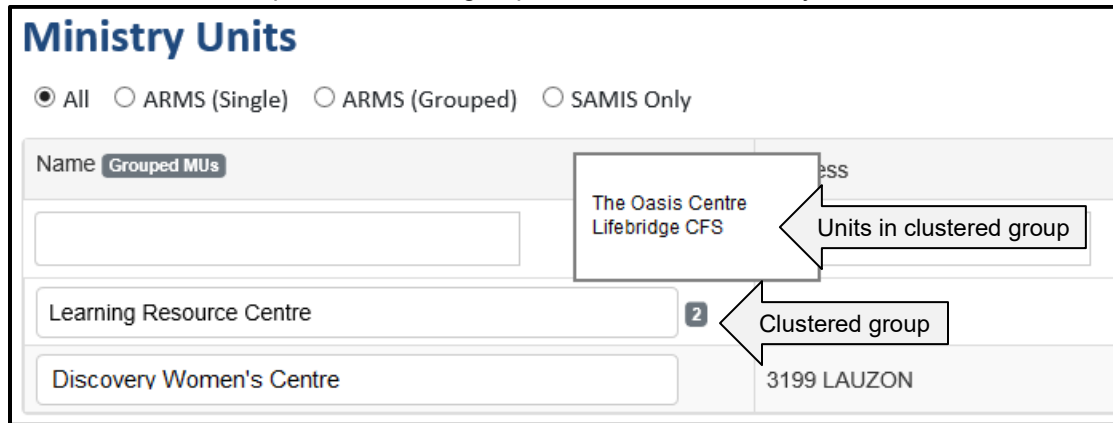
OK: The name "Discovery Women's Centre" has been updated to "The Woman Hub".

New MU Name is saved but SAMIS name remains same.

Clustered Groups

Clustered groups refer to Ministry Units that are linked as one entity. The Ministry Units are related and would have one accreditation review process. Clustered groups are created by the IT department within the ARMS application. If a unit is already in an active review, they cannot be made part of a group until the review is completed. If a Ministry Unit had a review in the past as a single unit, they can still become part of a clustered group, but any past reviews remain in the history of the single unit.

To see the membership of a clustered group, hover over the Ministry Unit in the reviews list.



The screenshot shows the 'Ministry Units' interface. At the top, there are radio buttons for 'All' (selected), 'ARMS (Single)', 'ARMS (Grouped)', and 'SAMIS Only'. Below this is a search bar with the text 'Name Grouped MUs'. A table lists units, with one unit highlighted: 'The Oasis Centre Lifebridge CFS'. A callout box points to this unit with the text 'Units in clustered group'. Another callout box points to a small '2' icon next to the unit name with the text 'Clustered group'. Below the highlighted unit, two other units are listed: 'Learning Resource Centre' and 'Discovery Women's Centre'. The address '3199 LAUZON' is visible at the bottom right of the table.

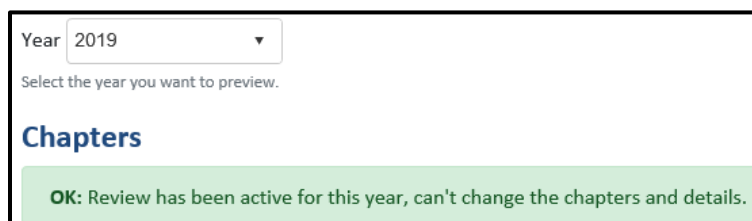
Chapters Maintenance

Chapters, sections, and standards are used in ARMS as the basis for ratings in accreditations. There are four core chapters that apply to all units being reviewed and are considered mandatory. The remaining chapters are program related and are used as determined by the specific programming of the ministry unit. In some units one program chapter might be used, while in other units several may be applicable.

A chapter is divided into sections. Each section covers a specific topic. Each chapter has numerous sections. To create a section, the associated chapter must be created first.

A section has numerous standards. The standard outlines the expectations and requirements related to that item, whether it is a document, a process, or a system that should be in place. The procedure directs the reviewer on how compliance will be determined. It may direct to a document or file to look in, a person, or identify specific steps to take. Each standard has a three-digit item number which identifies the chapter, the section, and the standard. To create a standard, the associated chapter and section must be created first.

If a review has been scheduled for the year, you will be unable to create any new chapters, sections, or standards for that calendar year. You will see this message.



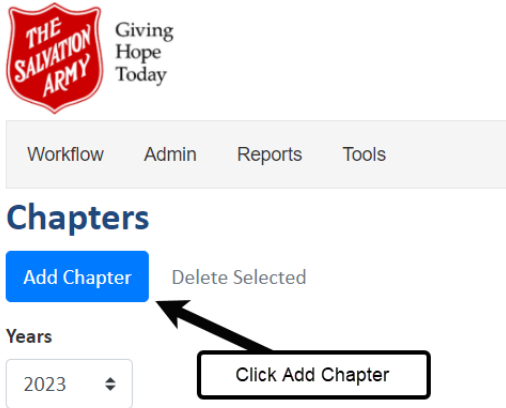
The screenshot shows the 'Chapters Maintenance' interface. At the top, there is a 'Year' dropdown menu set to '2019'. Below it is the text 'Select the year you want to preview.' The main heading is 'Chapters'. A green message box at the bottom contains the text: 'OK: Review has been active for this year, can't change the chapters and details.'

If there are no reviews scheduled for the year, you can proceed to create, modify, or delete chapters, sections, and standards.

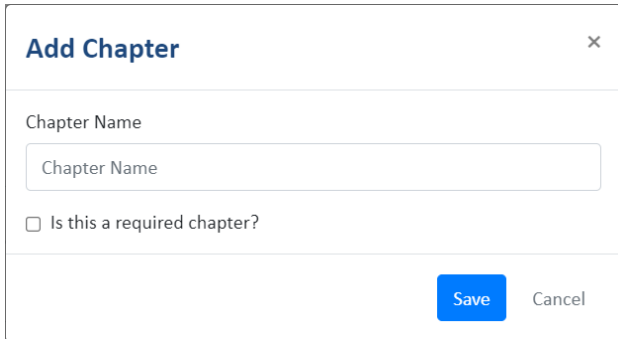


Add New Chapter

When a new chapter is created, the chapter ID is set at the next in the sequence.



1. Click on Add Chapter to enable adding of the chapter



2. Type a name for the chapter
3. Check if the chapter is a required chapter
4. Click Save

If the year has a review already scheduled, you will not be able to create any new chapters.

Add a Supplemental Chapter for existing chapter

This feature only available to the Application Coordinator role

1. Open Admin>Chapters
2. Click desired chapter to make the supplemental chapter entry



Workflow Admin Reports Tools

[ALL CHAPTERS](#) / GOVERNANCE & MANAGERMENTS

Chapter

Chapter #

1

Chapter Name

Governance & Managements

Mandatory



Save Changes

Supplementary Chapter

Add Supplementary

3. Click Add Supplementary

Sections

Add Section

Delete Selected

[ALL CHAPTERS](#) / [GOVERNANCE & MANAGEMENT](#) / [NEW SUPPLEMENTAL CHAPTER]

Parent Chapter: #1 Governance & Management

Save and Close

Cancel

Supplementary Chapter Name

Assign Sections and Standards

1.4 Organization

1.4.1 Regular

1.4.2 Regular

4. Enter Supplementary Chapter Name
5. Click Save and Close

Change supplementary name

1. Open Admin>Chapters
2. Click desired chapter to make the supplemental chapter name edit



Workflow Admin Reports Tools

[ALL CHAPTERS](#) / [GOVERNANCE & MANAGERMENTS](#) / TEST

Parent Chapter: #1 Governance & Managements

Save and Close

Cancel

Supplementary Chapter Name

TEST

3. Click to open Supplementary chapter
4. Click in the name section to enter/ change name
5. Save and Close

Delete supplementary

1. Open Admin>Chapters
2. Click desired chapter to delete the supplemental chapter
3. Click on the garbage can to delete

The screenshot shows the ARMS [UAT] Admin interface. At the top left is the Salvation Army logo with the text 'Giving Hope Today'. At the top right is 'ARMS [UAT]' and 'Sign Out Sylwia'. Below the logo is a navigation bar with 'Workflow', 'Admin', 'Reports', and 'Tools'. The main content area shows 'ALL CHAPTERS / GOVERNANCE & MANAGERMENTS'. Under the 'Chapter' section, there is a form with 'Chapter #' set to '1', 'Chapter Name' set to 'Governance & Managements', and a 'Mandatory' checkbox checked. A 'Save Changes' button is visible. Below this is the 'Supplementary Chapter' section, which shows 'TEST' and '1 Sections, 2 Standards'. A blue trash can icon is highlighted with a red box. At the bottom, there is a 'Sections' section with an 'Add Section' button and 'Delete Selected' text.

Edit Chapter

Open Admin>Chapters

Chapter # can not be edited. Automatically populates by sequence

The screenshot shows the ARMS [UAT] Admin interface for editing chapters. At the top left is the Salvation Army logo with the text 'Giving Hope Today'. At the top right is 'ARMS [UAT]' and 'Sign Out Sylwia'. Below the logo is a navigation bar with 'Workflow', 'Admin', 'Reports', and 'Tools'. The main content area shows 'Chapters' with an 'Add Chapter' button and 'Delete Selected' text. Below this is a 'Years' section with a dropdown menu set to '2023'. A search bar is visible on the right. Below the search bar is a table with columns for '#', 'Name', and 'Required'. The table contains three rows: 1. 'Governance & Management' (6 Sections, 34 Standards) with a green checkmark in the 'Required' column. 2. 'Employee Relations' (10 Sections, 44 Standards) with a green checkmark in the 'Required' column. 3. 'Facility' (5 Sections, 40 Standards) with a green checkmark in the 'Required' column. A large grey arrow points to the first row with the text '1. Select/Click the chapter to edit'.

#	Name	Required
1	Governance & Management 6 Sections, 34 Standards	✓
2	Employee Relations 10 Sections, 44 Standards	✓
3	Facility 5 Sections, 40 Standards	✓



2. Click on Chapter Name to type a new name
3. Checkmark to select mandatory or remove checkmark from mandatory
4. Click Save Changes

Chapter

Chapter # Chapter Name Mandatory

Delete Chapter

If you delete the chapter, all sections and standards associated with that chapter will also be deleted.

Open Admin>Chapters



Chapters

Years

2. Highlight (click on) chapter to delete
3. Click on Delete Selected

Search:

#	Name	Required
1	Governance & Managements 10 Sections, 45 Standards	<input checked="" type="checkbox"/>
2	Employee Relations 10 Sections, 44 Standards	<input checked="" type="checkbox"/>
3	Facility 5 Sections, 40 Standards	<input checked="" type="checkbox"/>

4. Please note a confirmation message will come up. Click OK to proceed with deleting chapter

arms_uat.sallynet.org says

Are you sure you want to delete this record?

Add New Section

Open Admin>Chapters



Chapters

Add Chapter

Delete Selected

Years

2023

Search:

#	Name	Required
1	Governance & Management 6 Sections, 34 Standards	✓
2	Employee Relations 10 Sections, 44 Standards	✓
3	Facility 5 Sections, 40 Standards	

2. Select/Click the chapter you require a New Section created within

Section ID picks up the next number in the sequence.



ALL CHAPTERS / TEST

Chapter

Chapter #

Chapter Name

Mandatory

17

Test

Save Changes

Supplementary Chapter

Add Supplementary

Sections

Add Section

3. Click Add New Section

Search:

Add Section

Section Name

Save

4. Enter name of Section

5. Click Save

6. Please note a confirmation message will come up. Click OK to proceed with creation of the Section

arms_uat.sallynet.org says

Are you sure you want to add this section?

OK Cancel

Edit Section

Open Admin>Chapters



Giving Hope Today

ARMS [UAT]

Sign Out Sylwia

Workflow Admin Reports Tools

Chapters

Add Chapter

Delete Selected

Years

2023

Search:

#	Name	Required
1	Governance & Management 6 Sections, 34 Standards	✓
2	Employee Relations 10 Sections, 44 Standards	✓
3	Facility 5 Sections, 40 Standards	

1. Select/Click the chapter to enable editing

The only editable sections is the Section Name. The Section # is automatically populated as per sequence and is not editable.



Giving Hope Today

ARMS [UAT]

Sign Out Sylwia

Workflow Admin Reports Tools

[ALL CHAPTERS](#) / [TEST](#) / [TEST A](#)

Section

Section #

1

Section Name

TEST A

2. Click on name field and re-enter a new name



Giving Hope Today

Workflow Admin Reports Tools

[ALL CHAPTERS](#) / [TEST](#) / [TEST A](#)

Section

Section #

1

Section Name

TEST B

Save Changes

3. Click Save Changes

4. Please note a confirmation will come up. Click OK to Save Changes.

arms_uat.sallynet.org says

Save Changes?

OK

Cancel

Delete Section

Open Admin>Chapters



Giving
Hope
Today

ARMS [UAT]

Sign Out Sylwia

Workflow Admin Reports Tools

Chapters

Add Chapter

Delete Selected

Years

2023

Search:

#	Name	Required
1	Governance & Management 6 Sections, 34 Standards	✓
2	Employee Relations 10 Sections, 44 Standards	✓
3	Facility 5 Sections, 40 Standards	

1. Select/Click the chapter in which the Delete Section resides



Giving
Hope
Today

ARMS [UAT]

Sign Out Sylwia

Workflow Admin Reports Tools

ALL CHAPTERS / TEST

Chapter

Chapter #

17

Chapter Name

Test

Mandatory

Save Changes

Supplementary Chapter

Add Supplementary

Sections

Add Section

Delete Selected

3. Click Delete

Search:

#	Name
17.1	TEST B 0 Standards

2. Click to highlight the Section that requires deletion

Showing 1 to 1 of 1 entries 1 row selected

4. Please note a confirmation of deletion will come up. Click OK to confirm.

arms_uat.sallynet.org says

Are you sure you want to delete this record?

OK

Cancel

Add New Standard

1. Open Admin>Chapters



Chapters

Add Chapter

Delete Selected

Years

2023

Search:

#	Name	Required
1	Governance & Management 6 Sections, 34 Standards	✓
2	Employee Relations 10 Sections, 44 Standards	✓
3	Facility 5 Sections, 40 Standards	

2. Select/Click the chapter where the Standard will be created



ALL CHAPTERS / TEST

Chapter

Chapter #

17

Chapter Name

Test

Mandatory

Save Changes

Supplementary Chapter

Add Supplementary

Sections

Add Section

Delete Selected

Search:

#	Name
17.1	TEST A 0 Standards

2. Click title of section



ALL CHAPTERS / TEST / TEST A

Section

Section #

1

Section Name

TEST A

Save Changes

Standards

Add Standard

3. Click Add Standard

Add Standard

Standard Point Weight

- Select --
- Regular
- Critical
- High Risk


4. Open the drop-down menu to select a Standard Point weight
5. Select which pertains to this Standard
6. Click Save

Please note a confirmation message of creation will come up. Click OK to confirm.

arms_uat.sallynet.org says

Are you sure you want to add this standard?

The standard ID will be created with the next number in sequence.



Giving Hope Today

ARMS [UAT]

Sign Out Sylwia

Workflow Admin Reports Tools

[ALL CHAPTERS](#) / [TEST](#) / [TEST A](#)

Section

Section # Section Name

Standards

Search:

#	Type
17.1.1	Regular

Showing 1 to 1 of 1 entries

Edit Standard

Open Admin>Chapter
 Click desired chapter
 Click desired section



Section

Section # Section Name

Standards

Search:

#	Type
17.1.1	Regular

Showing 1 to 1 of 1 entries

1. Double Click on Standard required to edit

Update Standards

Standard Point Weight

2. Update Standard Point Weight

Please note a confirmation message will come up. Please click OK to continue.

Updated.

Standards

#	Type
17.1.1	High Risk

Delete Standard

- Open Admin>Chapters
- Click desired chapter
- Click desired section



Section

Section # Section Name

Standards

1. Highlight desired Standard to delete
2. Click Delete Standard

Search:

#	Type
17.1.1	High Risk

**Please note a confirmation message will come up. Please click OK to continue.

Make Chapter Mandatory

There are mandatory chapters in ARMS that each Ministry Unit must complete.

1. Open Admin>Chapters
2. Click to open which Chapter will be Mandatory
3. Click Mandatory to add checkmark to desired chapter
4. Click "Save Changes"



Chapter

Chapter # Chapter Name

Remove Mandatory Status from Chapter

A Chapter may be removed from mandatory status.

1. Open Admin>Chapters
2. Click to check desired chapter to remove check from mandatory
3. Click Mandatory to remove checkmark to desired chapter
4. Click "Save Changes"



Giving
Hope
Today

Workflow Admin Reports Tools

ALL CHAPTERS / TEST

Chapter

Chapter #

17

Chapter Name

Test

Mandatory

Save Changes

Supplementary Chapter

Add Supplementary

Sections

Add Section

Delete Selected

Review Process Management - Review

Review process management provides tools for organizing ministry unit reviews. THQ personnel are responsible for scheduling the review process. Once a Ministry Unit has a review scheduled in ARMS, it will be displayed in the reviews list.

The Ministry Unit undergoing the review process provides the required information and documents for the review. If there are standards that do not meet accreditation expectations, the ministry unit will design an action plan to address those standards.

Reviews List

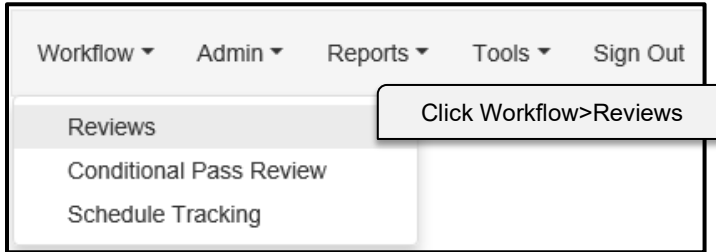
All members of the review team will be able to view the reviews list. However, you will only see the reviews for the Ministry Units assigned to you in the review list once the review has been scheduled in ARMS.

The screenshot shows the ARMS interface. At the top, there is a navigation bar with 'Workflow', 'Admin', 'Reports', 'Tools', and 'Sign Out'. A dropdown menu is open under 'Workflow', showing 'Reviews', 'Conditional Pass Review', and 'Schedule Tracking'. A callout box points to the 'Reviews' option with the text 'Click Workflow>Reviews'.

Below the navigation bar is the 'Accreditation Reviews' section. It features a table with columns: Name, Division, Started, Ended, and Released. The table contains several rows of data. A callout box points to the search filters above the table with the text 'Using the search filters, locate desired MU'. Another callout box points to the 'Toronto CJS Services' row with the text 'Click desired MU'.

Name	Division	Started	Ended	Released
Toronto		From: [] To: []		
Toronto CFS	OCE	12/27/2018	12/28/2018	
> East Toronto Men's Shelter	OCE			
Toronto CJS Services	OCE			
Toronto Genesis Centre	OCE			

Schedule Review



Locate the desired Ministry Unit in the list using the desired filter criteria.

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Sheets & Ratings Release Action Plan Close

Name <small>Grouped MUs</small>	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Resource		From: <input type="text"/> To: <input type="text"/>						
Compassion Resource Home	BCD	1/21/2019	1/21/2019				Team Selected	Test_TeamLeader2
Learning Resource Centre	BCD					1, 2, 4, 5,	Chapter Configured	
Loing Memories Adult Resource Centre	ALB						Team Selected	Test_TeamLeader1
Wellbeing Resource Hub	OCE	12/24/2018	12/24/2018				Scheduled	

Search filter. Use filter to locate desired MU

You will be able to see from the reviews list if the Ministry Unit currently has a review scheduled as you will see a date under review start date.

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Sheets & Ratings Release Action Plan Close

Name <small>Grouped MUs</small>	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Resource		From: <input type="text"/> To: <input type="text"/>						
Compassion Resource Home	BCD	1/21/2019	1/21/2019				Team Selected	Test_TeamLeader2
Learning Resource Centre	BCD	1/16/2019				1, 2, 4, 5,	Chapter Configured	
Loing Memories Adult Resource Centre	ALB	1/15/2019	1/15/2019				Team Selected	Test_TeamLeader1
Wellbeing Resource Hub	OCE	12/24/2018	12/24/2018				Scheduled	

MU with scheduled review

If Ministry Unit does not have a scheduled review, you will proceed to schedule the review for the Ministry Unit. Only an ARMS Coordinator or Review Scheduler can initially schedule reviews. Once a review has been assigned to a Team Leader, that individual can reschedule the review.

Accreditation Reviews

Schedule View Documents Sheets & Ratings Release Action Plan Close

Name <small>Grouped MUs</small>	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Resource		From: <input type="text"/> To: <input type="text"/>						
Compassion Resource Home	BCD	1/21/2019	1/21/2019				Team Selected	Test_TeamLeader2
Learning Resource Centre	BCD					1, 2, 4, 5,	Chapter Configured	
Loing Memories Adult Resource Centre	ALB						Team Selected	Test_TeamLeader1
Wellbeing Resource Hub	OCE	12/24/2018	12/24/2018				Scheduled	

2. Click Schedule

1. Click desired Name

If the Ministry Unit selected does not have a scheduled review, the default date on the calendar is blank. Locate the desired date on the calendar.

Schedule Review

Save Close Delete

Discovery Women's Shelter

Start Date: MM/DD/YYYY MM/DD/YYYY

End Date: MM/DD/YYYY MM/DD/YYYY

Today Oct, 2018

Day	Mon	Tue	Wed	Thu	Fri
1 Oct					
2		Northern Lights CFS			
3			Baldwin Residence		
4					
5					
8					
9		The Orchard Family Services			
10		Lifebridge Corps			
11					
12					
15					
16		New Beginnings Shelter			
17					
18					
19					
22					
23			The Healing Place		
24					
25					
26					
29					
30					
31					
1 Nov					
2					

Schedule Review

Save Close Delete

Discovery Women's Centre

Start Date: MM/DD/YYYY MM/DD/YYYY

End Date: November, 2018 MM/DD/YYYY MM/DD/YYYY

Thursday, November 01, 2018

S	M	T	W	T	F	S
44	28	29	30	31	1	2
45	4	5	6	7	8	9
46	11	12	13	14	15	16
47	18	19	20	21	22	23
48	25	26	27	28	29	30
49	2	3	4	5	6	7

1. Type the desired date as MM/DD/YYYY or click to select the date from the calendar to set review start date
2. Complete the exact process for the review end date
3. Click Save

After you click save, you will get this confirmation message.

Discovery Women's Centre

Start Date: 1/3/2019

End Date: 1/4/2019

OK: Review schedule has been saved.

When you close Schedule Review window and return to the Reviews List, you will see the Start and end date for the review.

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Sheets & Ratings Release Action Plan Close

Name	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Discovery		From: To:						
Discovery Women's Centre	OGL	11/1/2018	11/2/2018				Scheduled	

If you try to schedule a review with a start date earlier than the end date you will see this message.

Discovery Women's Centre

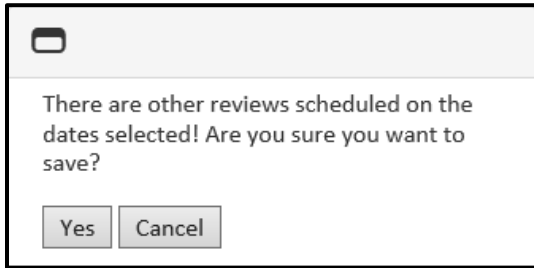
Start Date: 1/10/2019

End Date: 1/4/2019

Start date must be earlier than finish date

Schedule Review Date Conflict

If there is already a review scheduled for the date you selected, you will get a validation message.

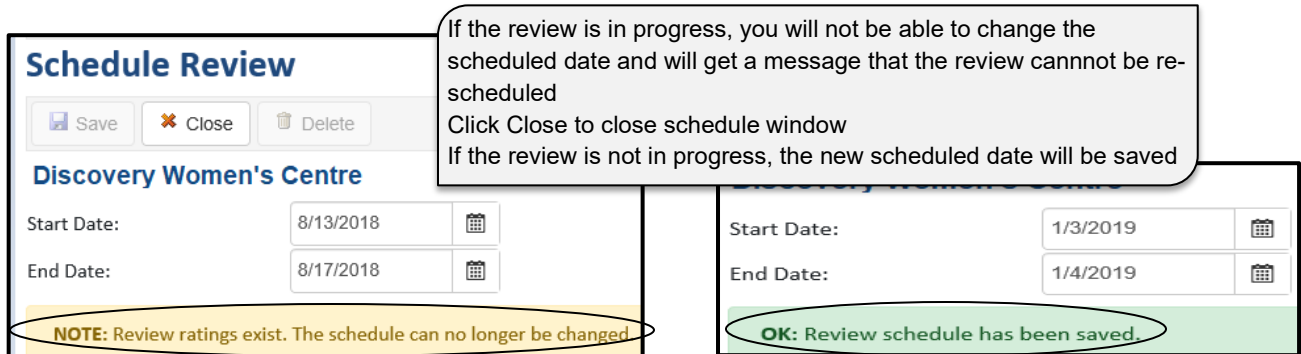
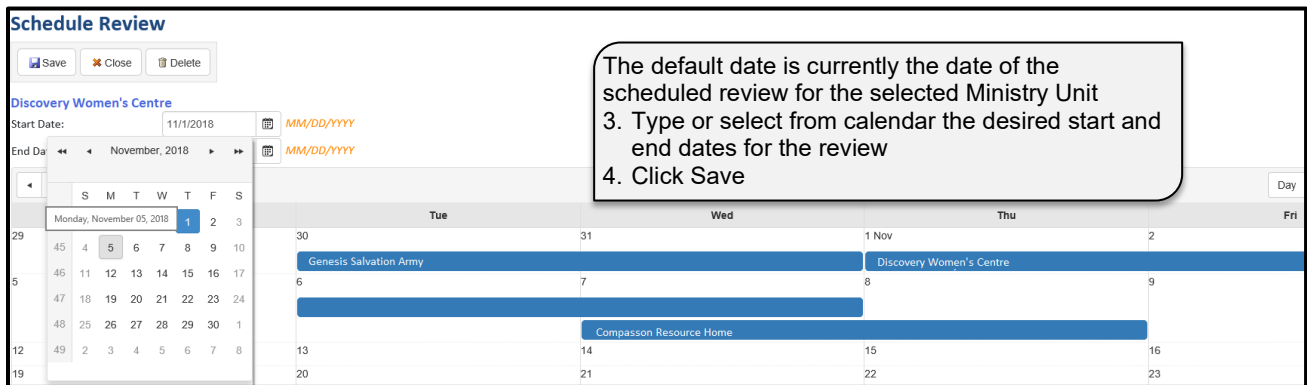


Click Cancel to select a different review date or click Yes to accept the requested date

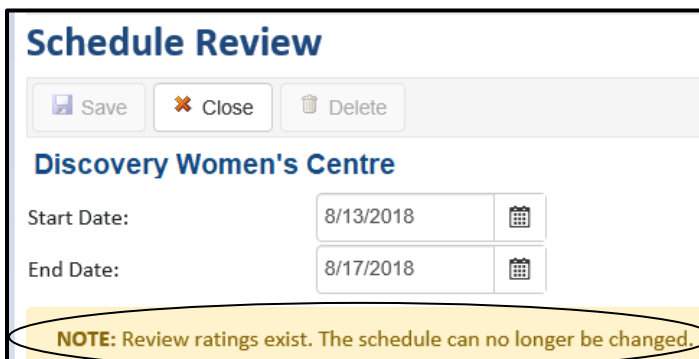
Change Review Scheduled Date

To change the review date for a MU:

1. Locate and click the desired Ministry Unit to select it in Reviews List
2. Click Schedule to open the calendar



Delete Review Scheduled Date

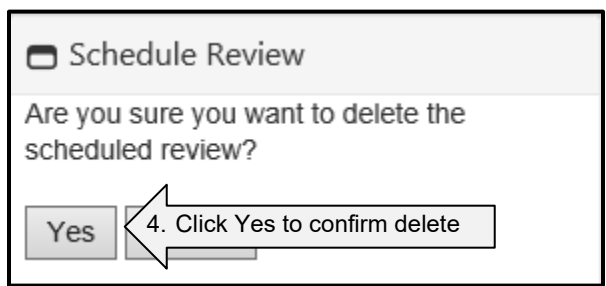
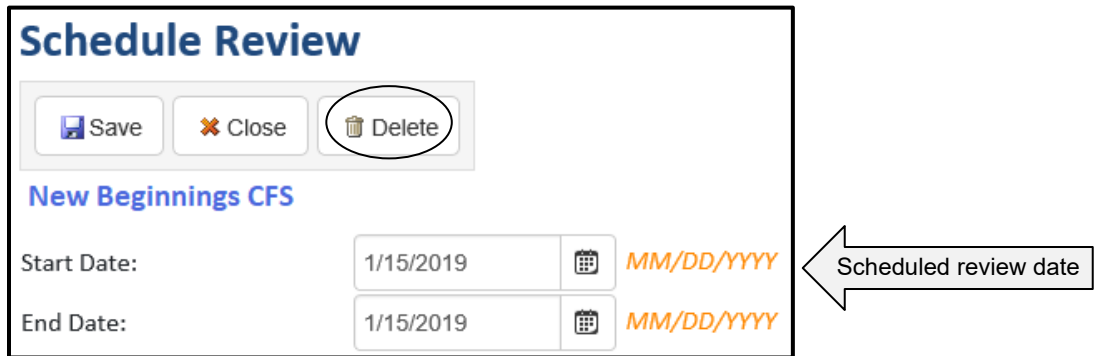


The date for the review cannot be deleted if there have been scores recorded for the review

You will see a message at the bottom of the review stating you cannot re-schedule the review; delete button is also greved out and cannot be accessed

If there aren't any scores recorded, you will be able to delete the review from the calendar.

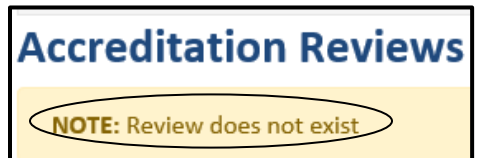
1. Select desired Ministry Unit
2. Click Schedule
3. Click Delete



The scheduled review is removed from the calendar and updated as having no start and end date for review in review list.

Chapter Configuration

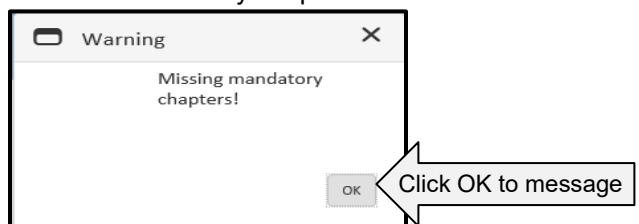
The chapters cannot be selected for a Ministry Unit before the review is scheduled; if you try to assign chapter prior to the review being scheduled, you will receive the error message below. Proceed to schedule a review date.



Only the ARMS Coordinator can initially assign chapters to a review, but once a Team Leader is assigned, they are able to reassign the chapters.

Configure Chapters

When you assign chapters to a Ministry Unit review, all mandatory chapters must be added or you will not be able to save the chapters. If you try to save without adding all mandatory chapters, you will get this message. Continue to add all mandatory chapters to the review.



Accreditation Reviews

Schedule Chapters **2. Click Chapters** Teams Reviewers Add Documents View Documents Sheets & Ratings Release Action Plan Close

Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Resource			From: <input type="text"/>	To: <input type="text"/>					
Compassion Resource Home		BCD	1/21/2019	1/21/2019				Team Selected	Test_TeamLeader2
Learning Resource Centre		BCD					1, 2, 4, 5,	Chapter Configed	
Loing Memories Adult Resource Centre		ALB						Team Selected	Test_TeamLeader1
Wellbeing Resource Hub		OCE	12/24/2018	12/24/2018				Scheduled	

1. Click desired MU

Ministry Unit Chapter Configuration

Save Close

Discovery Women's Centre
Review Date: 01/21/2019 - 01/21/2019

Available

- Chapter 1 Governance & Management***
- Chapter 2 Employee Relations kh test*****
- Chapter 4 Facility***
- Chapter 5 Spiritual & Religious Care***
- Chapter 6 Program
- Chapter 9 Residential Services
- Chapter 11 Community & Family Services
- Chapter 12 Correctional & Justice Services
- Chapter 13 Addiction Services

** mandatory chapter*

Assigned

- Chapter 1 Governance & Management***
- Chapter 2 Employee Relations kh test***

Assign Chapter Alias

3. Click desired chapter from Available chapters list in left pane
4. Click single arrow pointing to right to send chapters to Assigned Chapters list
5. Click Save

You will get a message that the selected chapters have been saved.

Discovery Women's Centre
Review Date: 01/09/2019 - 01/09/2019

OK: Selected chapters have been saved

Click Close button to return to Reviews List.

You will see on the Review List pages the chapters that have been assigned for the review.

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Sheets & Ratings Release Action Plan Close

Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Discovery Women's Centre		BCD	1/21/2019	1/21/2019			1, 2, 4, 5, 6, 13,	Chapter Configed	Test_TeamLeader2
Lifefridge Community Church		BCD	1/16/2019	1/17/2019			1, 2, 4, 5,		
Ministry Group 2		OCE	12/27/2018	12/28/2018				Scheduled	

Assigned chapters

If you do not add all desired chapters for review at same time, but add another chapter after you have saved chapter configuration, you will get a different message when saving the chapter configuration stating which chapters have been added.

Discovery Women's Centre
Review Date: 01/09/2019 - 01/09/2019

OK: Chapter:5 has been added.

Assign Single Chapter to Ministry Unit at Time

Select the desired Ministry Unit and open Chapters Configuration. All mandatory chapters are required to be added in order to save chapter configuration.

Ministry Unit Chapter Configuration
Save Close
Discovery Women's Centre
Review Date: 01/09/2019 - 01/09/2019
OK: Chapter:5 has been added.

Available

- Chapter 1 Governance & Management & kh***
- Chapter 2 Employee Relations kh test***
- Chapter 3 Facility***
- Chapter 4 Spiritual & Religious Care***
- Chapter 5 Programs

Assigned

- Governance & Management & kh***
- Employee Relations kh test***
- Facility***
- Spiritual & Religious Care***
- Programs

1. Click desired available chapter
2. Click arrow
3. Click Save
4. Get message confirming saved chapters

Discovery Women's Centre
Review Date: 01/09/2019 - 01/09/2019
OK: Chapter:5 has been added.

Assign Multiple Chapters to MU at Time

Ministry Unit Chapter Configuration
Save Close
Discovery Women's Centre
Review Date: 01/09/2019 - 01/09/2019
OK: Chapters: 6,8 have been added.

Available

- Chapter 1 Governance & Management & kh***
- Chapter 2 Employee Relations kh test***
- Chapter 3 Facility***
- Chapter 4 Spiritual & Religious Care***
- Chapter 5 Programs
- Chapter 7 Residential Services
- Chapter 8 Community & Family Services
- Chapter 9 Correctional & Justice Services

Assigned

- Governance & Management & kh***
- Employee Relations kh test***
- Facility***
- Spiritual & Religious Care***
- Programs
- Residential Services
- Correctional & Justice Services

1. Use the mouse and ctrl key to select chapters that are not listed sequentially; use the mouse and shift key to select chapters that are listed sequentially
2. Click arrow
3. Click Save
4. Get message confirming saved chapters

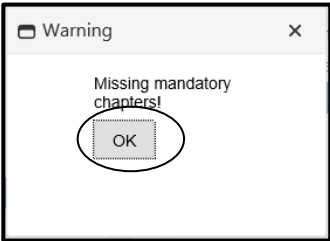
If you assign some chapters and save the configuration and then return and assign more chapters to the review, you will get a different message when you save the added chapters. See Ok message above.

Assign Mandatory Chapters

In chapter configuration, mandatory chapters are designated with ***. These chapters are required to be assigned to every scheduled review within the territory. If all mandatory chapters are not assigned to a review, you will get a warning message. You cannot save without assigning all mandatory chapters. Click OK to dismiss message and proceed to assign all mandatory chapters to the review.

*** mandatory chapter**

- Available**
- Chapter 1 Governance & Management***
 - Chapter 2 Employee Relations***
 - Chapter 3 Facility***
 - Chapter 4 Spiritual & Religious Care***



Assign Multiple Instances of Same Chapter

Ministry Unit Chapter Configuration

Save Close

New Horizon's Community Church
Review Date: 01/21/2019 - 01/21/2019

Available

- Chapter 1 Governance & Management***
- Chapter 2 Employee Relations kh test***
- Chapter 4 Facility***
- Chapter 5 Spiritual & Religious Care***
- Chapter 6 Program
- Chapter 9 Residential Services
- Chapter 11 Community & Family Services
- Chapter 12 Correctional & Justice Services
- Chapter 13 Addiction Services

Assigned

- Employee Relations kh test***
- Facility***
- Spiritual & Religious Care***
- Program
- Residential Services
- Community & Family Services
- Correctional & Justice Services
- Addiction Services
- Addiction Services-2

* mandatory chapter

1. Click desired available chapter
2. Click arrow
3. Repeat steps 1 and 2 to assign same chapter again
4. Click Save

Chapter 13 assigned twice

Name	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Discovery Women's Centre	BCD	1/21/2019				2, 13-1, 13-2	Chapter Configured	Test_TeamLeader2
Horizon's Community Church	BCD	1/16/2019	1/17/2019			1, 2, 4, 5	Chapter Configured	

Multiple instances same chapter

Assign Chapter Alias

To change the name of a chapter, that chapter must already be assigned to the review. A chapter name can be personalized to refer to a specific program or facility in a review where there is more than one instance of the same chapter.

1. Click desired chapter in assigned chapters
2. Click assign Chapter Alias
3. Type a name for the chapter
4. Click Save

Chapter name

Set Chapter Alias

Give selected chapter an alias name:

Spiritual & Religious Care-2***

Spiritual Development

Save Close

New Chapter name

Assigned

- Governance & Management***
- Employee Relations***
- Facility***
- Spiritual & Religious Care***
- Spiritual Development***

Assign Chapter Alias

Chapter Configuration:

- Select chapter for Edmonton review (select chapters 1,2,3,4)

Workflow Admin Reports Tools

Ministry Unit Chapter Configuration

Save Close

Edmonton Centre of Hope

Review Date: Jan 10, 2022 - Jan 12, 2022

OK: Selected chapters have been saved

Available	Assigned
Chapter 1 Governance & Management***	→ Governance & Management***
Chapter 2 Employee Relations***	← Employee Relations***
Chapter 3 Facility***	Facility***
Chapter 4 Spiritual & Religious Care***	Spiritual & Religious Care***
Chapter 5 Program	
Chapter 6 Residential Services	
Chapter 7 Community & Family Services	
Chapter 8 Correctional & Justice Services	

* mandatory chapter

Assign Chapter Alias Manage Supplementary Chapter

- NOTE:** Review in 2022, chapter 3 has a supplementary, if you hi-light chapter 3 “Manage Supplementary” button is enabled.

Workflow Admin Reports Tools

Ministry Unit Chapter Configuration

Save Close

Edmonton Centre of Hope

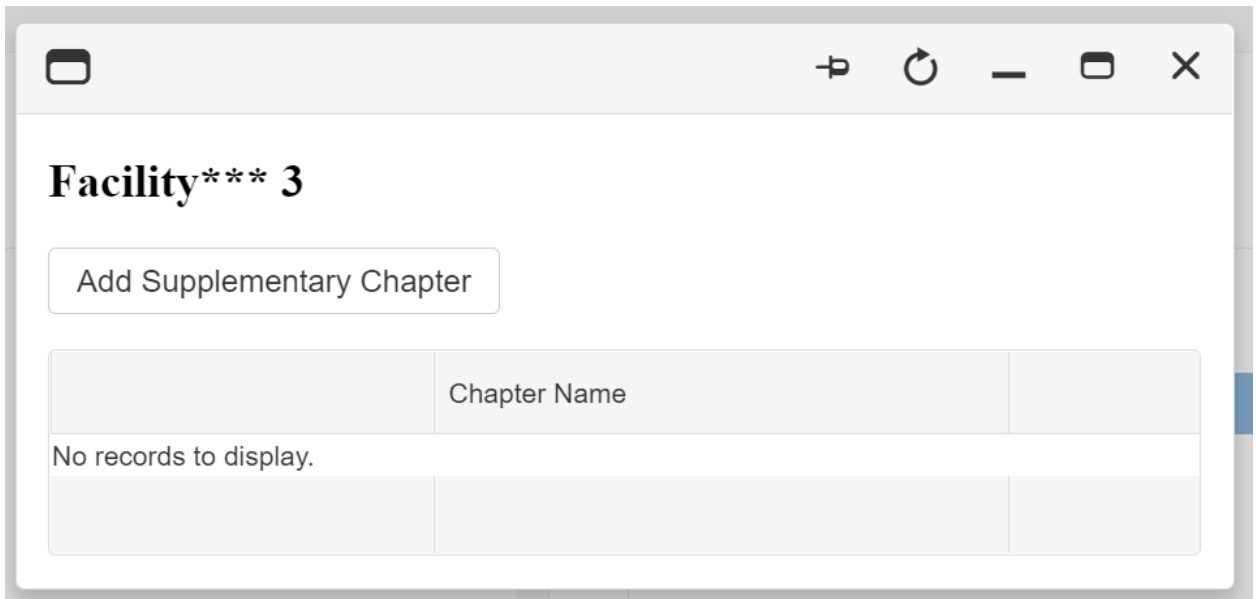
Review Date: Jan 10, 2022 - Jan 12, 2022

Available	Assigned
Chapter 1 Governance & Management***	→ Governance & Management***
Chapter 2 Employee Relations***	← Employee Relations***
Chapter 3 Facility***	Facility***
Chapter 4 Spiritual & Religious Care***	Spiritual & Religious Care***
Chapter 5 Program	
Chapter 6 Residential Services	
Chapter 7 Community & Family Services	
Chapter 8 Correctional & Justice Services	

* mandatory chapter

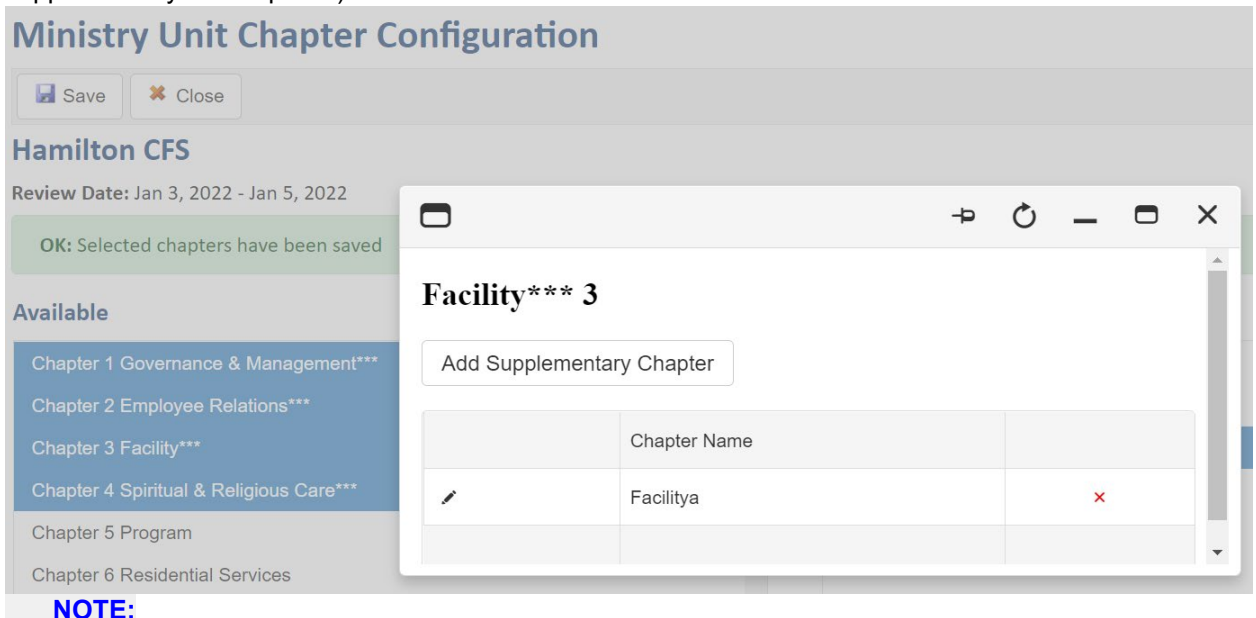
Assign Chapter Alias Manage Supplementary Chapter

Click the manage Supplementary Chapter button, will pop up a dialogue:



You have option to add Supplementary Chapter, we can skip this in this review

- Select chapter for Hamilton review (select chapters 1,2,3 and supplementary, 4 and then add supplementary for chapter 3)



Review in 2022, chapter 3 has a supplementary, we add a supplementary by click ADD Supplementary chapter button. The default supplementary chapter ID is 3a, chapter name is "Facilitya", next one is 3b, "Facilityb" ...

You can change the name of the supplementary of the review or remove the supplementary from the review before the review is submitted.

Remove Single Assigned Chapters

The screenshot shows the 'Ministry Unit Chapter Configuration' interface for 'Discovery Women's Centre'. The 'Review Date' is 01/09/2019 - 01/09/2019. A green message bar at the top states 'OK: Chapter: 5 has been removed.' The interface is divided into 'Available' and 'Assigned' sections. The 'Available' section lists chapters 1 through 5. The 'Assigned' section lists chapters 1 through 5, with 'Correctional & Justice Services' selected. Annotations include: '3. Click save' pointing to the Save button; '1. Click desired chapter' pointing to 'Correctional & Justice Services' in the Assigned list; and '2. Click arrow pointing left' pointing to the left arrow button between the Available and Assigned lists.

Single instances of mandatory chapters cannot be removed. Multiple instances of the same mandatory chapter can be removed, and all mandatory chapters can be removed at same time.

Remove Multiple Chapters from Ministry Unit at Same Time

The screenshot shows the 'Ministry Unit Chapter Configuration' interface for 'Discovery Women's Centre'. The 'Review Date' is 01/09/2019 - 01/09/2019. The 'Available' section lists chapters 1 through 8. The 'Assigned' section lists chapters 1 through 8, with 'Residential Services', 'Community & Family Services', and 'Correctional & Justice Services' selected. Annotations include: '3. Click save' pointing to the Save button; '1. Use the mouse and ctrl key to select chapters that are not listed sequentially; use the mouse and shift key to select chapters that are listed sequentially' pointing to the selected chapters in the Assigned list; and '2. Click arrow pointing left' pointing to the left arrow button between the Available and Assigned lists.

You will get a message stating the chapters have been removed; you cannot remove mandatory chapters if it has only one instance of the chapter. You will get the message below. Click OK to dismiss message.

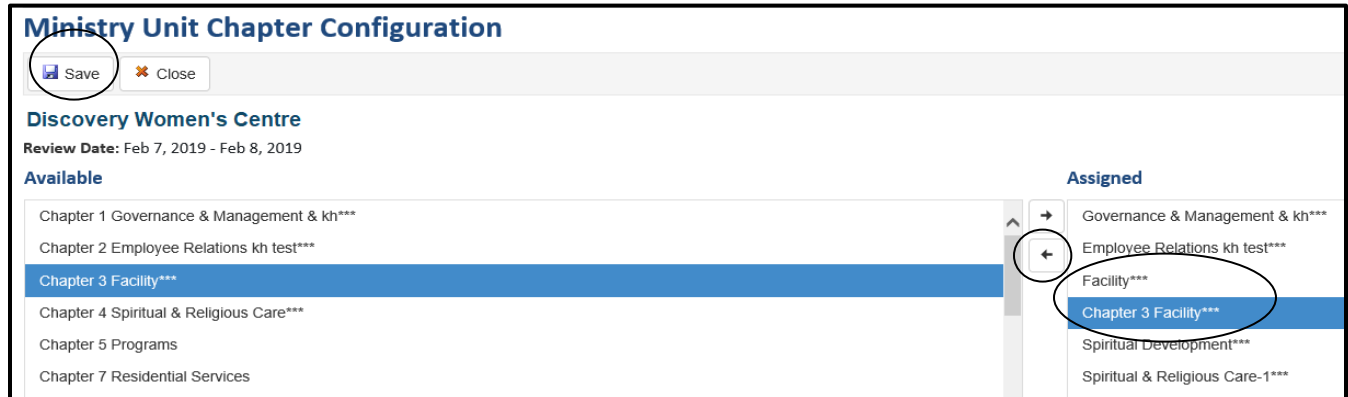
The screenshot shows the 'Discovery Women's Centre' interface with the 'Review Date' 01/09/2019 - 01/09/2019. A green message bar at the bottom states 'OK: Chapters: 7 ,9 have been removed.'

The screenshot shows a 'Warning' dialog box with the text 'Missing mandatory chapters!' and an 'OK' button.

Remove Mandatory Chapters

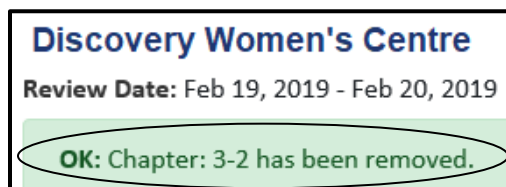
You are able to remove mandatory chapters from a review but certain requirements must be met. If there are multiple instances of the mandatory chapter, you can remove those.

1. Click the desired chapter to be removed
2. Click arrow pointing left
3. Click Save



The screenshot shows the 'Ministry Unit Chapter Configuration' window for 'Discovery Women's Centre' with a review date of Feb 7, 2019 - Feb 8, 2019. It features two columns: 'Available' and 'Assigned'. In the 'Available' column, 'Chapter 3 Facility***' is selected. In the 'Assigned' column, 'Chapter 3 Facility***' is also present. A left-pointing arrow button is circled, indicating the action to move the selected chapter from available to assigned. The 'Save' button is also circled.

You will get a message that the multiple instance of the mandatory chapter has been removed.



The screenshot shows a confirmation message box with the title 'Discovery Women's Centre' and the review date 'Feb 19, 2019 - Feb 20, 2019'. The message text is 'OK: Chapter: 3-2 has been removed.', which is circled in green.

However, if there is only one instance of the mandatory chapter in assigned chapters, you will not be able to remove one mandatory chapter; you will have to remove all mandatory chapters in order to save the chapter configuration.

1. Click all four mandatory chapters using the ctrl+shift key
2. Click the arrow pointing left
3. Click Save



The screenshot shows the 'Ministry Unit Chapter Configuration' window for 'Discovery Women's Centre' with a review date of Feb 7, 2019 - Feb 8, 2019. In the 'Available' column, 'Chapter 3 Facility***' is selected. In the 'Assigned' column, four mandatory chapters are listed: 'Governance & Management & kh***', 'Employee Relations kh test***', 'Facility***', and 'Spiritual & Religious Care-1***'. A left-pointing arrow button is circled, indicating the action to move the selected chapter from available to assigned. The 'Save' button is also circled.

You will get a confirmation message that the chapters have been deselected.

Ministry Unit Chapter Configuration

Save Close

Discovery Women's Centre
Review Date: Feb 7, 2019 - Feb 8, 2019

OK: Chapters have been deselected.

Available

- Chapter 1 Governance & Management & kh***
- Chapter 2 Employee Relations kh test***
- Chapter 3 Facility***
- Chapter 4 Spiritual & Religious Care***
- Chapter 5 Programs

Assigned

No mandatory chapters assigned

You will get this message if you select less than all mandatory chapters; click OK to dismiss message and continue to remove all mandatory chapters.

Warning

Missing mandatory chapters!

OK

Remove All Chapters from MU at Same Time

Ministry Unit Chapter Configuration

Save

Northern Lights CFS
Review Date: 12/03/2018 - 12/03/2018

Available

- Chapter 1 Governance & Management***
- Chapter 2 Employee Relations***
- Chapter 3 Facility***
- Chapter 4 Spiritual & Religious Care***
- Chapter 5 Program

Assigned

- Governance & Management***
- Employee Relations***
- Facility***
- Spiritual & Religious Care***

3. Click save

1. Use the mouse and shift key to select all the chapters

2. Click double pointing left

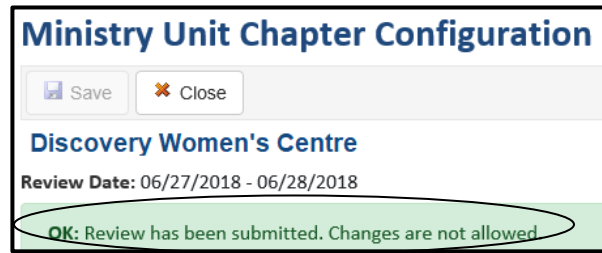
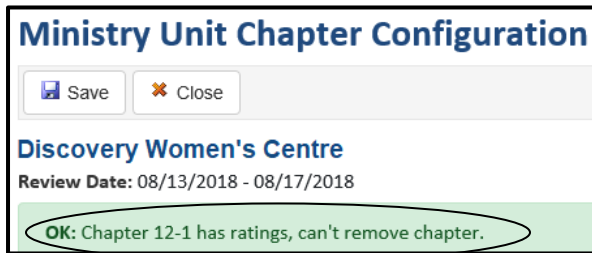
You will get a message stating the chapters have been deselected. All mandatory chapters must be removed at once or you will get a message as outlined above "missing mandatory chapters".

Discovery Women's Centre
Review Date: 01/15/2019 - 01/16/2019

OK: Chapters have been deselected.

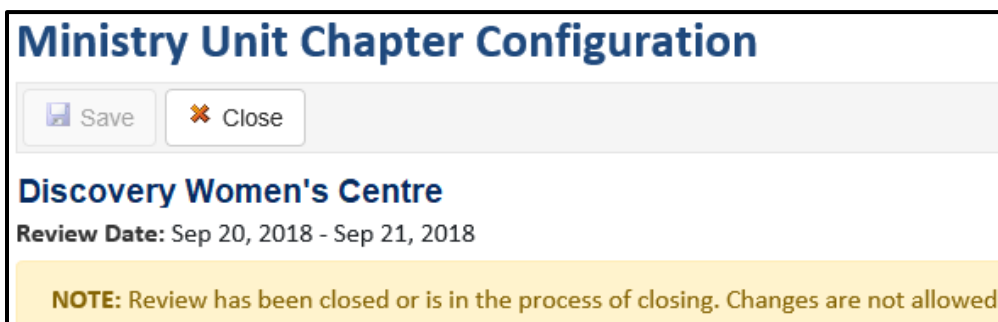
Remove Chapters with Ratings

Any chapter that has ratings entered, submitted, or approved cannot be removed from the review. You will see a message similar to one of the messages below.



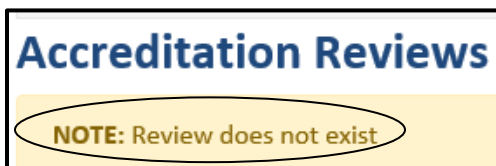
Remove Chapters When Review is Closed

If a review has been closed, you cannot modify the chapters assigned to the review. You will get the message below.



Select Review Team

Each review that is scheduled has a review team assigned to it. In order to assign a review team to the Ministry Unit, there must be a scheduled review. If there is no scheduled review, you will receive this message.



Click Ok to dismiss message and proceed to schedule a review for Ministry Unit

Select desired Ministry Unit from list and confirm there is a review scheduled for the Ministry Unit. Only the ARMS Coordinator and Team Leader can select team members to assign to a review.

Assign Team Leader

Every review is assigned a team leader. You can save the team leader without having assigned reviewers or action plan reviewers to the review; however, you will receive a message reminding you to select reviewers.

Name	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Discovery Women's Centre	BCD	1/21/2019	1/21/2019					Test_TeamLeader2
Lifebridge Community Church	BCD	1/16/2019	1/17/2019			1, 2, 4, 5,	Chapter Configured	
Ministry Group 2	OCE	12/27/2018	12/28/2018				Scheduled	

Team Selection

Save Review Team Save Action Plan Team Close

Discovery Women's Centre

NOTE: Team Leader is saved, but Reviewer has not been selected yet.

3. Click drop-down to select team leader
4. Click Save Review Team
5. Get confirmation message team leader saved but reviewers still need to be selected

Add Reviewer(s) to Team

Reviewers must be added to each review. You can add one reviewer at a time, or you can add multiple reviewers by using the mouse and ctrl key or the mouse and shift key. Choose the desired Ministry Unit and click Teams button.

Team Selection

Save Review Team Save Action Plan Team Close

Discovery Women's Centre

NOTE: Team_Leader1,Test_AreaCommander1,test_reviewer1 have been added.

MU Chapters: 1, 2, 3, 4,
Review Date: 01/08/2019 - 01/08/2019
Team Lead: Team Leader1

Review

Available

test AreaCommander2
Test Reviewer2
Test TeamLeader1

Selected

Team Leader1
test AreaCommander1
Test Reviewer1

Use the mouse and ctrl key to select multiple reviewers that are not listed sequentially; use the mouse and shift key to select multiple reviewers that are listed sequentially

1. Click drop-down to select team leader
2. Click desired available reviewers and click arrow to assign selected reviewers
3. Click Save Review Team
4. Get confirmation message that team has been saved

If you try to save the the reviewer team without having set a team leader, you will get the message below and the team will not be saved. Proceed to select a review team leader.

Team Selection

Save Review Team Save Action Plan Team Close

Discovery Women's Centre

NOTE: Team leader has not been selected!

MU Chapters: 1, 2, 3, 4,
Review Date: 01/08/2019 - 01/08/2019
Team Lead: Select...

Review

Available

test AreaCommander2
Test Reviewer2
Test TeamLeader1

Selected

Team Leader1
test AreaCommander1
Test Reviewer1

Team Member Has Conflicting Reviews

If a team member has been assigned to two reviews at the same time, you will get a notification message when you try to add that team member to a second review. You are still able to assign the team member to multiple reviews at the same time

Team Selection

Discovery Women's Centre

MU Chapters: 1, 2, 3, 4,
Review Date: Feb 7, 2019 - Feb 8, 2019
Team Lead:

Review

Available

- test AreaCommander1 *
- test AreaCommander2
- Test Reviewer1 *
- Test Reviewer2 *

* Indicates that this user has a conflicting review for this date range.

Selected

Add Action Plan Reviewer(s)

Team Selection

Discovery Women's Centre

NOTE: Added Reviewer to Action Plan: test_DHQApprover1

MU Chapters: 1, 2, 3, 4,
Review Date: Jan 22, 2019 - Jan 23, 2019
Team Lead:

Review

Available

- Team Leader1
- Team Leader2
- Team Leader3
- test AreaCommander2
- Test Team leader2

* Indicates that this user has a conflicting review for this date range.

Action Plan

Reviewers

- test AreaCommander2
- test DHQApprover1
- test DHQApprover2

Planners

- Check All
- test muCoord10

1. Open desired ministry units to teams view
2. Click to check desired available action plan reviewers
3. Click Save Action Plan Team
4. Get confirmation message that action reviewer has been added

Selected

- test AreaCommander1
- Test Reviewer1
- Test Reviewer2
- Test TeamLeader1

You can save a team leader and a review team without selecting the action plan reviewers at the same time. You can save the review team without having saved the action plan reviewers and vice versa.

If you try to save the action plan reviewers without having set a team leader, you will get the message below and the action plan reviewer will not be saved. Proceed to select a review team leader. You will get a confirmation when the action plan reviewer has been added successfully.

Team Selection

Save Review Team Save Action Plan Team

Discovery Women's Centre

NOTE: Team leader has not been selected!

When you close select review team window and return to the review list, you will see the status indicating the reviewers have been selected for the review.

Name	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Fountain Women's Home	OCE	12/18/2018	12/19/2018	10/24/2018		1, 2, 3, 4,	THQ Approved Action Plan	Test_TeamLeader1
Genesis Community Centre	OCE	12/13/2018	12/14/2018	9/18/2018		1, 2, 3, 4, 5,	THQ Approved Action Plan	Test_TeamLeader1
Loving Memories Retirement Residence	OCE	12/3/2018	12/5/2018	9/27/2018		1, 2, 3, 4, 5, 6,	THQ Approved Action Plan	Test_TeamLeader2
New Beginnings Shelter	OCE	12/24/2018	12/24/2018				Team Selected	Test_TeamLeader1
The Oasis Centre	OGL	11/1/2018	11/2/2018				Team Selected	Test_TeamLeader1

Add Action Plan Planner

The action plan planner is visible on the right under Planners. There may be one or more than one action plan planners.

Team Selection

Save Review Team Save Action Plan Team Close

Discovery Women's Centre

NOTE: Added Planner to Action Plan: test_muCoord10

MU Chapters: 1, 2, 3, 4,
 Review Date: Jan 22, 2019 - Jan 23, 2019
 Team Lead: Test TeamLeader1

Review

Available

- Team Leader1
- Team Leader2
- Team Leader3
- test AreaCommander2
- Test Team leader2

* Indicates that this user has a conflicting review for this date range.

Action Plan

Reviewers

- test AreaCommander1
- test AreaCommander2
- test DHQApprover1
- test DHQApprover2

Planners

- Check All
- test muCoord10

1. Open desired ministry units to teams view
 2. Click to check desired available action plan planners
 3. Click Save Action Plan Team
 4. Get confirmation message that action planner has been added

Team Selection

Save Review Team Save Action Plan Team

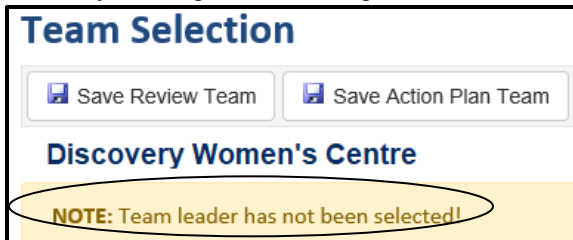
Discovery Women's Centre

NOTE: Team leader has not been selected!

In order to save action plan planner, a team leader must also be selected and saved

Remove Team Leader if no scores are entered

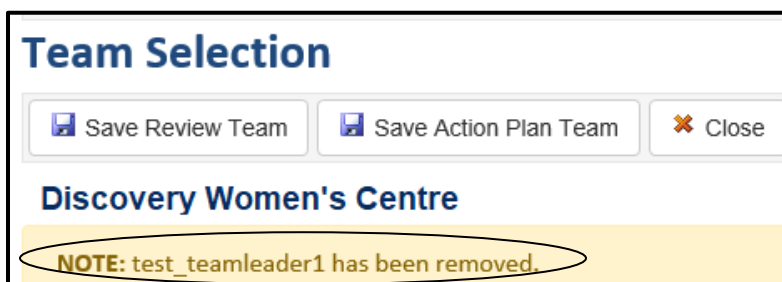
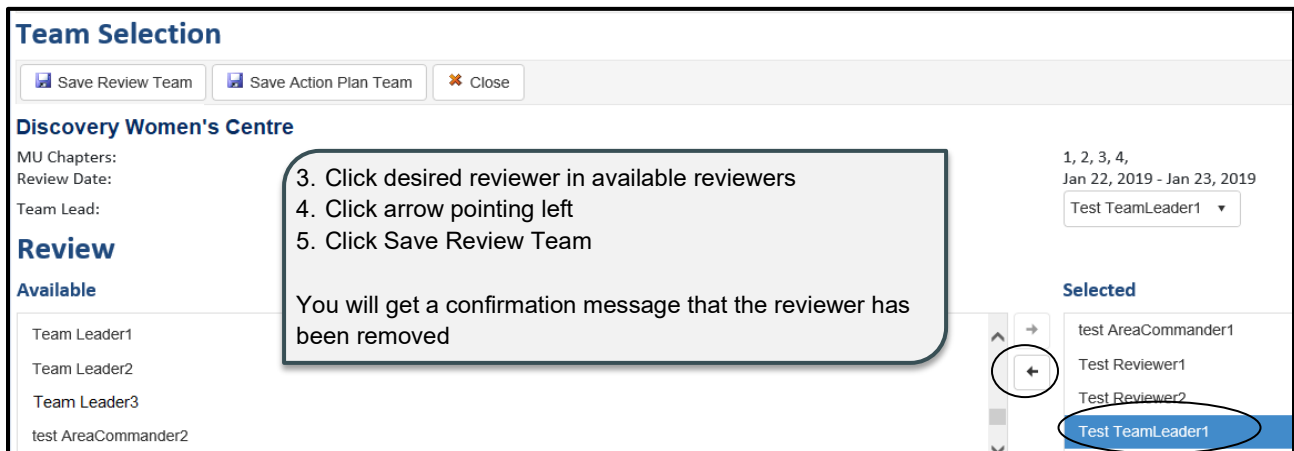
The team leader cannot be removed if there are team reviewers and action plan reviewers selected. If all team reviewers and action plan reviewers are removed from a review, the team leader is automatically removed. If you try to remove the team leader while there are still team reviewers and action plan reviewers assigned to the review, you will get the message below.



Remove Team Reviewer if no scores are entered

This is the ideal time to remove reviewers as there are no restrictions.

1. Click to select the desired Ministry Unit from the reviews list
2. Click Teams



If whole team is removed (including reviewers and planners), the team leader is automatically removed from the review.

Team Selection

Save Review Team Save Action Plan Team Close

Discovery Women's Centre

NOTE: Review teams has been deselected.

MU Chapters: 1, 2, 3, 4
Review Date: 01/08/2019 - 01/08/2019
Team Lead: Team Leader1

Review

Available

test AreaCommander1
test AreaCommander2

Selected

Remove Action Plan Reviewer if no scores have been entered

This is the ideal time to change or remove action plan reviewers as there are no restrictions.

1. Click to select the desired Ministry Unit from the reviews list
2. Click Teams

Team Selection

Save Review Team Save Action Plan Team Close

Discovery Women's Centre

NOTE: Removed Reviewer from Action Plan: test_DHQApprover1

MU Chapters: 1, 2, 3, 4
Review Date: Jan 22, 2019 - Jan 23, 2019
Team Lead: Test TeamLeader1

Review

Available

Team Leader1
Team Leader2
Team Leader3
test AreaCommander2

Selected

test AreaCommander1
Test Reviewer1
Test Reviewer2

* Indicates that this user has a conflicting review for this date range.

Action Plan

Reviewers

test AreaCommander1
 test AreaCommander2
 test DHQApprover1

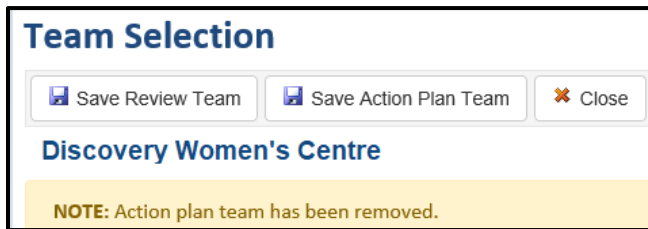
Planners

Check All
 test muCoord10

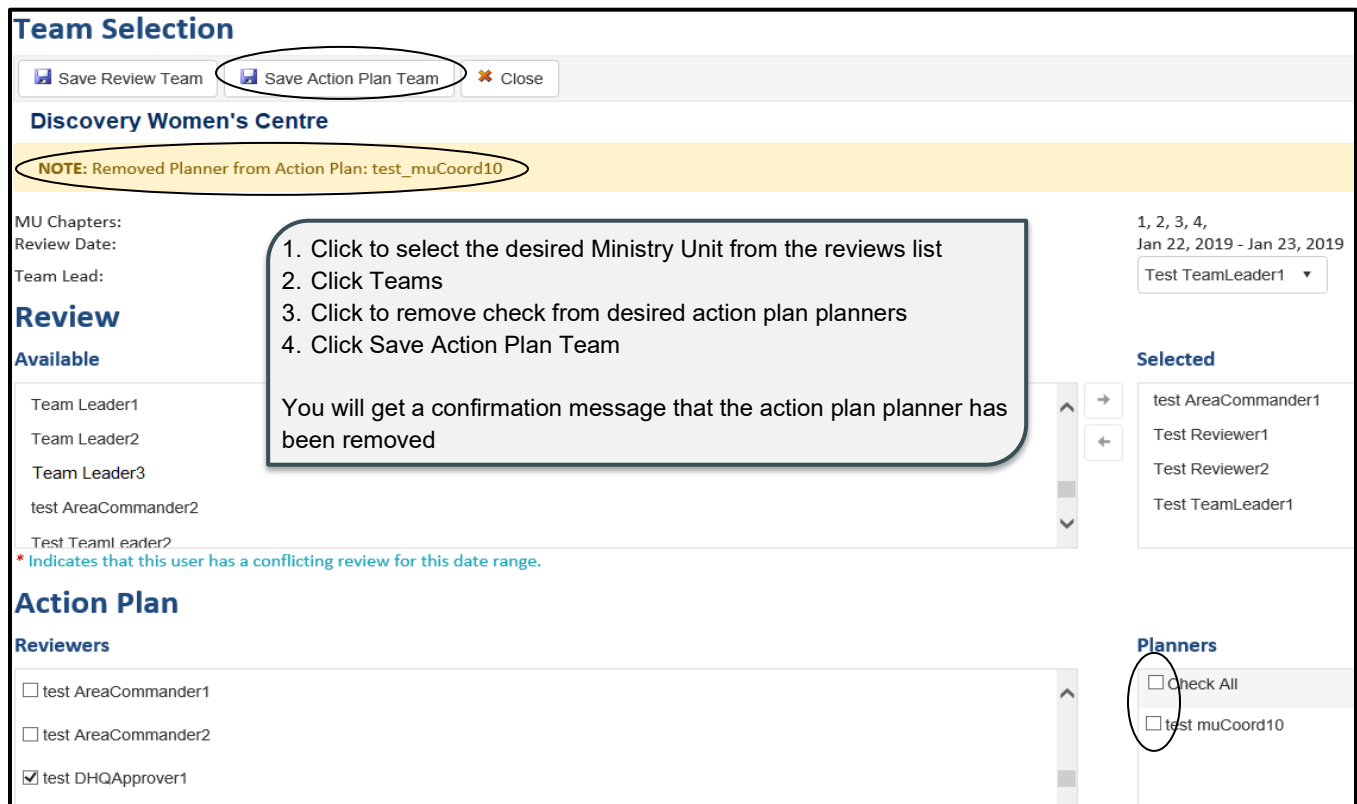
3. Click to remove check from desired action plan reviewer
4. Click Save Action Plan Team

You will get a confirmation message that the action plan reviewer has been removed

If all reviewers and action plan approvers have been removed from the review, the team leader will also be removed.



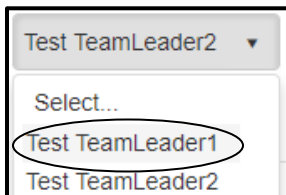
Remove Action Plan Planner if no scores have been entered



Change Team Leader/Team Reviewers/Action Plan Reviewers

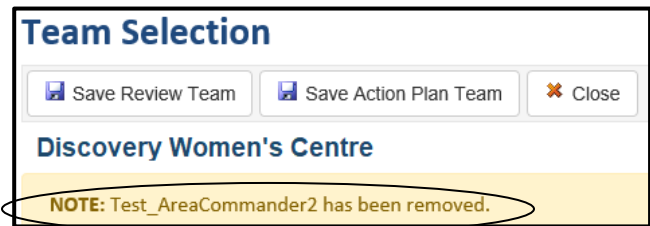
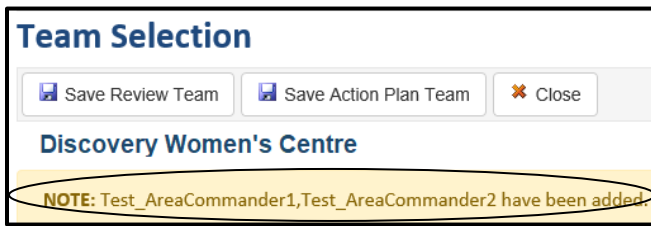
If no scores have been entered, you are able to change the team leader as well as the team reviewers and action plan reviewers.

Select drop-down to select a new team leader; click Save Team Review



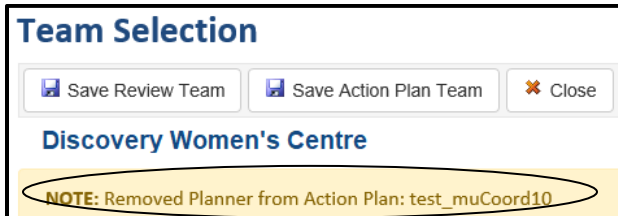
Remove team reviewers by selecting the name in selected reviewers and clicking arrow pointing left to assign to available reviewers. Select new team reviewers in available reviewers and click arrow pointing right to send to selected reviewers.

Click Save review Team; you will receive a confirmation message as below



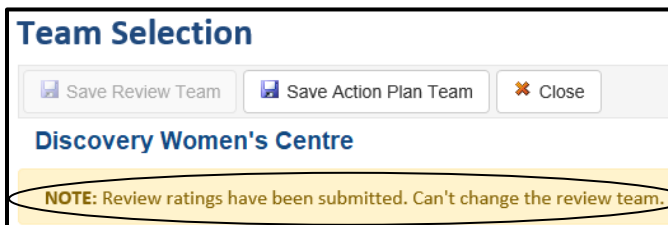
Remove the check from desired action plan reviewer and click to check the new action plan reviewer.

Click Save Action Plan Reviewer; you will receive a similar message as below.



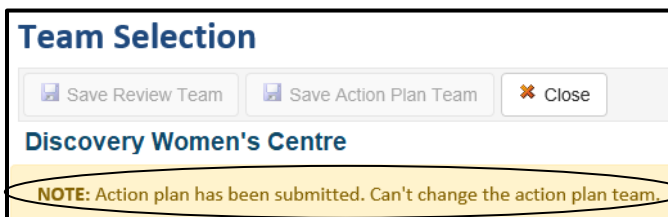
Remove Team Leader/Team Reviewers if scores have been entered

If scores have been entered, the team leader and team reviewers cannot be removed. You will get the message below.



Remove Action Plan Reviewers or Planners if Action Plan Submitted

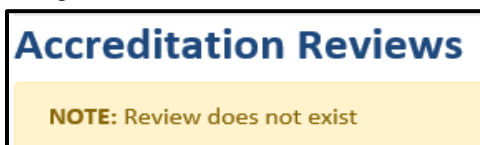
If the action plan has been submitted, you will be unable to remove action plan reviewers or planners and will get a message similar to below.



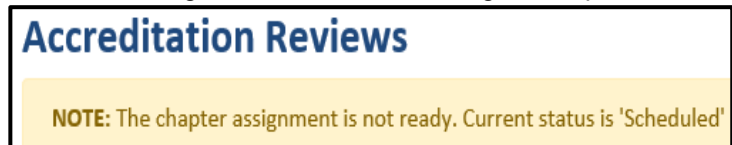
Assign Reviewers to Chapters

Only the ARMS Coordinator or the Team Leader can assign chapters to the selected reviewers. The scheduling of the review, chapter configuration, and select review team are to be completed before you can assign chapters to reviewers.

Assign reviewers before schedule review



Assign reviewers before configure chapters



Assign reviewers before review team selected

Accreditation Reviews

NOTE: The chapter assignment is not ready. Current status is 'Chapter Configured'

Once all chapters have been assigned to reviewers, you will be able to save and will receive a confirmation message that the chapters assignment has been saved.

Accreditation Reviews

Schedule Chapters Teams Reviewers Sheets & Ratings Release Action Plan Close

Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Resource	<input type="checkbox"/>		From: <input type="text"/> To: <input type="text"/>						
Compasion Resource Home	<input type="checkbox"/>	BCD	12/24/2018	1/21/2019				Team Selected	Test_TeamLeader2
Learning Resource Centre	<input type="checkbox"/>	BCD					1, 2, 4, 5,	Chapter Configured	
Loing Memories Adult Resource Centre	<input type="checkbox"/>	ALB						Team Selected	Test_TeamLeader1
Wellbeing Resource Hub	<input type="checkbox"/>	OCE	12/24/2018	12/24/2018				Scheduled	

Review Team Chapter Assignment

Save Close

Discovery Women's Centre

NOTE: Chapter assignments have been saved.

Chapters: 1, 2, 3, 4,
 Review Date: 01/08/2019 - 01/09/2019
 Team Leader: Team_Leader1

Chapter Reviewers

* Indicates that this user has a conflicting review for this date range.

Chapter 1 - Governance & Management & kh

Available	Assigned
Team Leader2	Team Leader2
test AreaCommander1	
Test Reviewer1	

Chapter 2 - Employee Relations kh test

Available	Assigned
Team Leader2	
test AreaCommander1	test AreaCommander1
Test Reviewer1	

If reviewers have not been assigned to all chapters, you will not be able to save and will get a message confirming that all chapters are not assigned and you cannot save chapters assignment.

Review Team Chapter Assignment

Save Close

Discovery Women's Centre

NOTE: The chapter assignment: 3 ,4 is incompletd. Can't Save.

When reviewers have been assigned to chapters and have been saved, you will get an updated status on the Accreditation Reviews list.

Accreditation Reviews										
Schedule Chapters Teams Reviewers Add Documents View Documents Sheets & Ratings Release Action Plan Close										
Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	Leader	
			From: <input type="text"/>	To: <input type="text"/>						
Elegant CFS		BCD	1/21/2019	1/21/2019			1, 2, 4, 5, 6, 9, 11, 12, 13-1, 13-2.	Chapter Configured	Test_TeamLeader2	
Fountain Youth Residence		BCD	1/16/2019	1/17/2019			1, 2, 4, 5.	Chapter Configured		
Compassion Retirement Residence		OCE	1/7/2019	1/8/2019			1, 2, 4, 5.	Scheduled		
Wellbeing Resource Hub		OCE	1/2/2019	1/4/2019			1, 2, 4, 5.	Reviewer Assigned	Test_TeamLeader1	

If reviewers have multiple reviews for same time, you will see the red asterisk next to review name when the chapters are assigned to the reviewer.

Review

Available

- test AreaCommander2
- Test Reviewer2
- Test TeamLeader1
- Test TeamLeader2

Selected

- Team Leader2 *
- test AreaCommander1 *
- Test Reviewer1 *

* Indicates that this user has a conflicting review for this date range.

Assign Multiple Reviewers to Same Chapter

You can assign multiple reviewers to each chapter but all chapters must have at least one reviewer assigned in order to save the chapter assignment. If you assign multiple reviewers to the same chapter, each reviewer can enter ratings but only one reviewer will be able to submit the ratings. When one reviewer has submitted the ratings, the button will be greyed out to all reviewers for that chapter.

Review Team Chapter Assignment

Save Close

Discovery Women's Centre

NOTE: Added test_reviewer1 to chapter 2

Chapters: 1, 2, 3, 4
 Review Date: Jan 22, 2019 - Jan 23, 2019
 Team Leader: Test_TeamLeader2

Chapter Reviewers

* Indicates that this user has a conflicting review for this date range.

Chapter 1 - Governance & Management & kh

Available

- test AreaCommander1
- Test Reviewer1
- Test Reviewer2

Assigned

- Test Reviewer1

Chapter 2 - Employee Relations kh test

Available

- test AreaCommander1
- Test Reviewer1
- Test Reviewer2

Assigned

- test AreaCommander1
- Test Reviewer1

2 reviewers same chapter

If you assign another reviewer to the same chapter after you have saved it originally, you will get this message when you save the chapter assignment. Notice the differences from the screen above.

Reviewer Has Conflicting Reviews

If a reviewer has been assigned to two reviews at the same time, you will get a notification message when you try to assign chapters to that reviewer. You are still able to assign the reviewers to multiple reviews at the same time.

Review Team Chapter Assignment

Discovery Women's Centre

Chapters: 1, 2, 3, 4,
Review Date: Feb 7, 2019 - Feb 8, 2019
Team Leader: Team_Leader1

Chapter Reviewers

* Indicates that this user has a conflicting review for this date range.

Chapter 1 - Governance & Management & kh

Available	Assigned
test AreaCommander1	test AreaCommander1 *
Test Reviewer1 *	
Test Reviewer2 *	

Chapter 2 - Employee Relations kh test

Available	Assigned
test AreaCommander1 *	Test Reviewer1 *
Test Reviewer1 *	
Test Reviewer2 *	

Remove Reviewers from Chapters

The reviewers for chapters can be removed. If there is more than one reviewer assigned to a chapter, you can remove all but one reviewer for each chapter. If each chapter has only one reviewer, then all reviewers must be removed to save the changes. Once all reviewers have been removed from chapters, you will get a confirmation message that the changes have been saved.

Remove One Reviewer from Chapter that has Multiple Reviewers

Review Team Chapter Assignment

Discovery Women's Centre

Chapters: 1, 2, 3, 4,
Review Date: Jan 22, 2019 - Jan 23, 2019
Team Leader: Test_TeamLeader2

Chapter Reviewers

* Indicates that this user has a conflicting review for this date range.

Chapter 1 - Governance & Management & kh

Available	Assigned
test AreaCommander1	Test Reviewer1
Test Reviewer1	
Test Reviewer2	

Chapter 2 - Employee Relations kh test

Available	Assigned
test AreaCommander1	test AreaCommander1
Test Reviewer1	Test Reviewer1
Test Reviewer2	

1. Click desired reviewer for each desired chapter in far right that has more than one reviewer
2. Click arrow pointing left
3. Click Save

Review Team Chapter Assignment

Save Close

Discovery Women's Centre

NOTE: Removed test_reviewer1 from chapter 2

You get confirmation message that the reviewer was removed

Remove All Reviewers from All Chapters

Each chapter must have at least one reviewers assigned to save the chapters assignment. Therefore if you are trying to remove reviewers and each chapter does not have at least one reviewer, you will have to remove all reviewers to save chapters assignment.

Review Team Chapter Assignment

Save Close

Discovery Women's Centre

NOTE: Chapters assignment is removed

Chapters:
Review Date: 1, 2, 3, 4, Jan 22, 2019 - Jan 23, 2019
Team Leader: Test_TeamLeader2

Chapter Reviewers
* Indicates that this user has a conflicting review for this date range.

Chapter 1 - Governance & Management & kh

Available

test AreaCommander1	Assigned
Test Reviewer1	
Test Reviewer2	

Chapter 2 - Employee Relations kh test

Available

test AreaCommander1	Assigned
Test Reviewer1	
Test Reviewer2	

Chapter 3 - Facility

Available

test AreaCommander1	Assigned
Test Reviewer1	
Test Reviewer2	

Chapter 4 - Spiritual & Religious Care

Available

test AreaCommander1	Assigned
Test Reviewer1	
Test Reviewer2	

1. Click desired reviewer for each desired chapter in far right
2. Click arrow pointing left
3. Click Save

Review Team Chapter Assignment

Save Close

Discovery Women's Centre

NOTE: Chapters assignment is removed

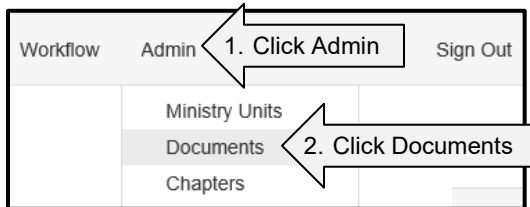
You get confirmation message that chapter assignment was removed

Remove Team Reviewers from Review After Assigned to Chapters

If no scores have been entered, you can remove reviewers from the review even if the reviewers have been assigned chapters. The reviewer will be removed from the team as well as from the chapter the reviewer was assigned to. You will then have to assign a new reviewer to the chapter that was assigned to the team member you removed. If a review has scores entered by the reviewer you are trying to remove, you will not be able to remove that reviewer.

Document Templates

Required review documents are created by the ARMS Coordinator from the review list, Add Documents option. These documents then become available in View Documents for Ministry Units. Local Personnel can download any available templates and can submit these templates and all other required documents in View Documents. Once the documents are submitted, all other members of the review team will be able to view the completed documents under View Documents view.



Add Templates and Create List of Required Documents

The ARMS Coordinator can add document templates and create the list of required documents for ministry units. This list of active documents is then visible to ministry units in Add Documents. If a document is made inactive after the date of the scheduled review, it will remain visible to those Ministry Units. However, any Ministry Units with reviews scheduled after the document was made inactive will not be able to see the document.

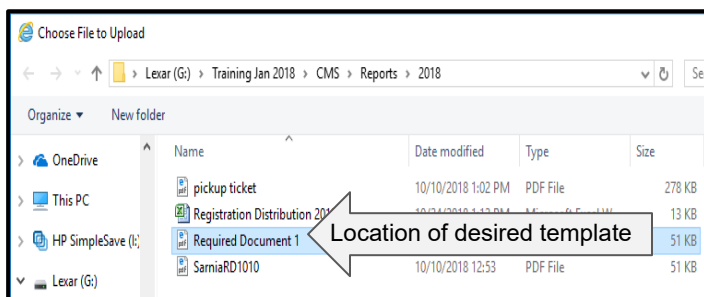


A form titled 'Documents Maintenance' for adding a new document template. It includes the following fields and controls:

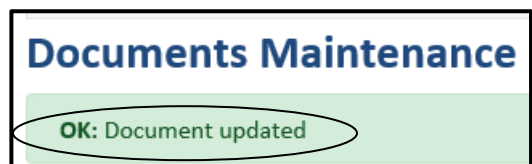
- Document Name: Required Document 1
- File Name: (empty)
- Remove Existing File:
- Mandatory:
- Active Date: 11/5/2018 (with calendar icon)
- Inactive Date: MM/DD/YYYY (with calendar icon)
- Select the File: (empty) [Select]
- [Save] [Close] buttons

A callout box on the right lists the following steps:

2. Type a name for the document
3. Click to check if document is mandatory
4. Click calendar icon to set an active date
5. Click select to choose file if there is a desired template
6. Click Save



You get confirmation message that document updated



You will see the document in the list. If there is a template associated with the document you will see a file name.

Documents Maintenance							
+ Add New Document Template							
		Document Name	Mandatory Documents	Active Date	Inactive Date	File Name	Uploaded By
		<input type="text"/>	<input type="checkbox"/>			<input type="text"/>	<input type="checkbox"/>
		Required Document 1	<input checked="" type="checkbox"/>	11/5/2018		Required Document 1.pdf	Coordinator
		Review Schedule (Uploaded by THQ SSD)	<input type="checkbox"/>	3/28/2018	12/31/2018		Coordinator 1

← Template loaded

Edit Required Document

1. Open Admin>Documents
2. Locate desired document in list

Documents Maintenance							
+ Add New Document Template							
		Document Name	Mandatory Documents	Active Date	Inactive Date	File Name	Uploaded By
		<input type="text"/>	<input type="checkbox"/>			<input type="text"/>	<input type="checkbox"/>
		Required Document 1	<input checked="" type="checkbox"/>	11/5/2018		Required Document 1.pdf	Coordinator
		Review Schedule (Uploaded by THQ SSD)	<input type="checkbox"/>	3/28/2018	12/31/2018		Coordinator 1

← 3. Click edit

Document Name

File Name *Required Document 1.pdf*

Remove Existing File

Mandatory

Active Date

Inactive Date

Select the File Required Document 1.pdf [Remove](#)

4. Make desired changes to document by typing over required document name, select/deselect mandatory and/or modify active date
5. Click Save

You will receive a confirmation message that the document has updated.



Remove Existing Template File

If the document template uploaded needs to be removed, the ARMS Coordinator can complete this process. Using the seteps above in Edit Required Documents. open the desired document and place it in edit mode.

The screenshot shows the 'Edit Required Documents' form. The 'Document Name' field contains 'Required Document 1'. The 'File Name' field contains 'Required Document 1.pdf', with an arrow pointing to it labeled 'Current template file name'. The 'Remove Existing File' checkbox is checked, with an arrow pointing to it labeled '1. Click Remove existing file'. The 'Mandatory' checkbox is also checked. The 'Active Date' is '11/5/2018'. The 'Inactive Date' is 'MM/DD/YYYY'. The 'Select the File' field is empty, with a 'Select' button next to it. At the bottom right, there are 'Save' and 'Close' buttons, with an arrow pointing to the 'Save' button labeled '2. Click Save'.

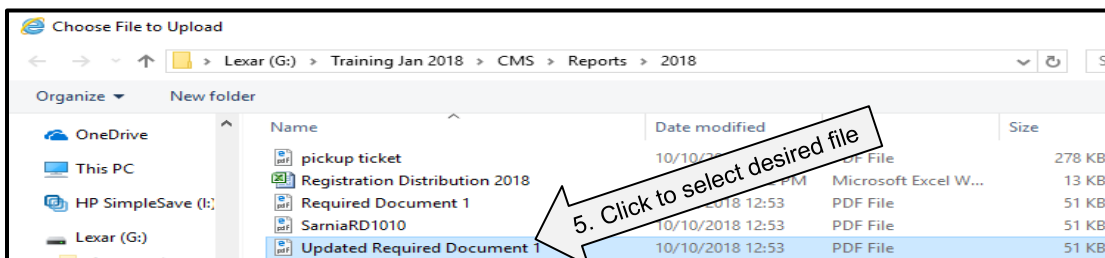
You will receive a confirmation message that the document has updated.



Replace Existing Template File

If the document template uploaded needs to be replaced, the ARMS Coordinator can complete this process. Using the seteps above in Edit Required Documents. open the desired document and place it in edit mode.

The screenshot shows the 'Edit Required Documents' form. The 'Document Name' field contains 'Required Document 1'. The 'File Name' field contains 'Required Document 1.pdf', with an arrow pointing to it labeled 'Current template file name'. The 'Remove Existing File' checkbox is unchecked. The 'Mandatory' checkbox is checked. The 'Active Date' is '11/5/2018'. The 'Inactive Date' is 'MM/DD/YYYY'. The 'Select the File' field is empty, with a 'Select' button next to it, and an arrow pointing to it labeled '4. Click Select'. At the bottom right, there are 'Save' and 'Close' buttons, with an arrow pointing to the 'Save' button labeled '3. Click Save'.



Document Name: Required Document 1

File Name: Updated Required Document 1.pdf

New template file name

You get confirmation message that document updated

Documents Maintenance

OK: Document updated

Inactivate Required Document

Required documents may be made inactive. This means the document will remain in the list for future activation but will not be displayed on Submit Documents view. If a required document is inactivated, it will appear in the list of past required documents but not in the list for future scheduled reviews. Enter document edit mode following the steps listed above in Edit Required Documents List.

Document Name: Required Document 1

File Name: Updated Required Document 1.pdf

Remove Existing File:

Mandatory:

Active Date: 11/5/2018

Inactive Date: 11/30/2018

Select the File: Select

Save Close

1. Type an inactive date or select date from calendar

2. Click Save

You get confirmation message that document updated

Documents Maintenance

OK: Document updated

Delete Required Document

If a document is removed from the list of required documents, it will no longer be accessible. If this document is required again in the future, it will have to be added again using the steps listed above in Add Templates and Create List of Required Documents.

1. Locate desired document in list

Documents Maintenance

+ Add New Document Template

	Document Name	Mandatory Documents	Active Date	Inactive Date	File Name
	<input type="text"/>	<input type="checkbox"/>			
		<input checked="" type="checkbox"/>	11/5/2018		Updated Required Document 1.pdf
	Review Schedule (Uploaded by THQ SSD)	<input type="checkbox"/>	3/28/2018	12/31/2018	

2. Click delete

If the document has been used for review, you will get this message when you try to delete

Message from webpage

Delete this document?

OK

3. Click OK

Documents Maintenance

NOTE: Document is in Review, can't delete

If the document has not been used for review, the document will be removed from required documents

Documents Maintenance

NOTE: Document Deleted

Add Documents

Ministry units will have to download document templates that are uploaded by ARMS Coordinator; then they submit completed templates and other documents required for ARMS.

Accreditation Reviews

Schedule Chapters Teams Reviewers **Add Documents** Mission Plan Close

1. Click desired MU

2. Click Add Documents

Name	Division	Started	Ended	Released	Closed	Chapters
Discovery Women's Centre		2019	1/16/2019			1, 2, 3, 4

Download Template Documents

Document templates can be downloaded from ARMS and saved locally. Templates available to download will display "Open Template" message. Only the Ministry Unit Personnel assigned ARMS access can download the templates for the Ministry Unit.

Required Documents

Ministry Unit: Carmanville Corps
 MU Chapters: 1, 2, 3, 4
 Review Date: 11/12/2018 - 11/13/2018

Ministry units are to submit all documentation listed below. Templates are available where required.

Required Document	Mandatory Documents	Submitted Documents	Document Link
001 - Ministry Unit Profile	<input checked="" type="checkbox"/>	Open Template	Submit Document Undo
002 - Strategic Plan	<input type="checkbox"/>		Submit Document Undo
003 - Mission Statement	<input checked="" type="checkbox"/>		Submit Document Undo

1. Click Open Template

2. Click Save, save as, or open as desired

Choose where you are going to save the template

Do you want to open or save Training Plan ARMS 15-05-2018.doc (237 KB) from webtest1.sallynet.org?

Open Save Save as Save and open

Submit Review Documents

Ministry units can submit required documents within ARMS. These documents may be a template downloaded from ARMS or a document that already exists within the Ministry Unit. Only the Ministry Unit Personnel with ARMS access and the ARMS Coordinators can submit required documents for the Ministry Unit.

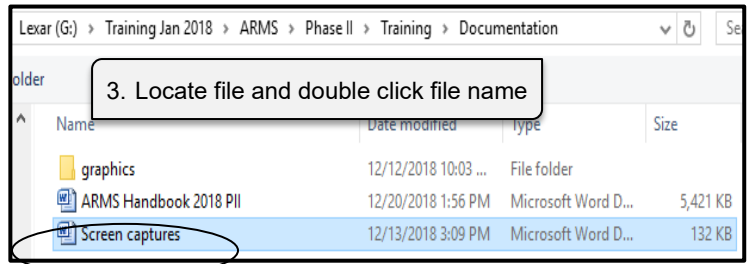
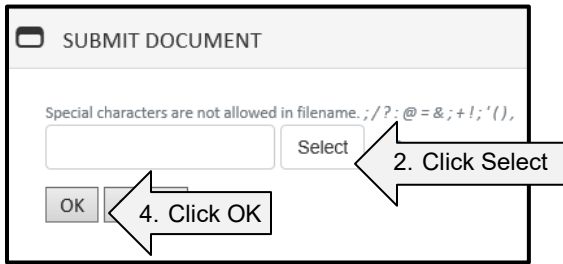
Required Documents

Ministry Unit: Northern Lights CFS
 MU Chapters: 1, 2, 3, 4
 Review Date: 12/06/2018 - 12/06/2018

Ministry units are to submit all documentation listed below. Templates are available where required.

Required Document	Mandatory Documents	Submitted Documents	Document Link
001 - Ministry Unit Profile	<input checked="" type="checkbox"/>	Open Template	/ARMS_TEST_PH2/Documents/ReviewID_83/S... Submit Document Undo
002 - Strategic Plan	<input type="checkbox"/>		Submit Document Undo
003 - Mission Statement	<input checked="" type="checkbox"/>		Submit Document Undo

1. Click Submit document



Required Documents

Close

Northern Lights CFS

MU Chapters: 1, 2, 3, 4
Review Date: 12/06/2018 - 12/06/2018

Ministry units are to submit all documentation listed below. Templates are available where required.

Required Document	Mandatory Documents	Submitted Documents	Document Link		
001 - Ministry Unit Profile	<input checked="" type="checkbox"/>	Open Template	/ARMS_TEST_PH2/Documents/ReviewID_83/Screen captures.docx	Submitted document	Undo
002 - Strategic Plan	<input type="checkbox"/>			Submit Document	Undo
003 - Mission Statement	<input checked="" type="checkbox"/>			Submit Document	Undo

View Submitted Documents

Required Documents

Close

Northern Lights CFS

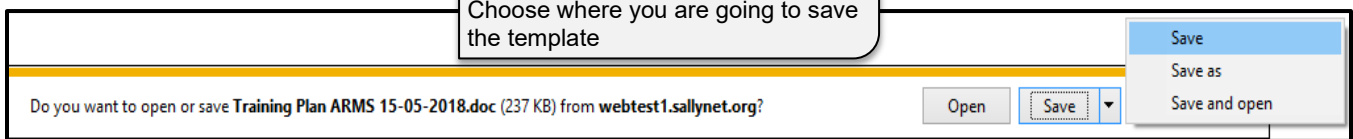
MU Chapters: 1, 2, 3, 4
Review Date: 12/06/2018 - 12/06/2018

Ministry units are to submit all documentation listed below. Templates are available where required.

Required Document	Mandatory Documents	Submitted Documents	Document Link		
001 - Ministry Unit Profile	<input checked="" type="checkbox"/>	Open Template	/ARMS_TEST_PH2/Documents/ReviewID_83/Screen captures.docx	View Document	Submit Document
002 - Strategic Plan	<input type="checkbox"/>			Submit Document	Undo
003 - Mission Statement	<input checked="" type="checkbox"/>			Submit Document	Undo

2. Click Save, save as, or open as desired

Choose where you are going to save the template



Remove Submitted Document

If the MU Personnel want to remove or submit a new or updated version of the required document, use the feature undo to complete the process.

1. Locate **desired** document in list

Required Documents

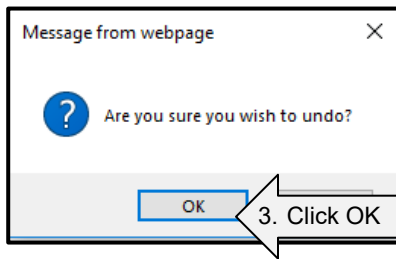
Close

Ministry Unit: Carmanville Corps
MU Chapters: 1, 2, 3, 4
Review Date: 11/12/2018 - 11/13/2018

Ministry units are to submit all documentation listed below. Templates are available where required.

Required Document	Mandatory Documents	Submitted Documents	Document Link		
001 - Ministry Unit Profile	<input checked="" type="checkbox"/>	Open Template		Submit Document	Undo
002 - Strategic Plan	<input type="checkbox"/>			Submit Document	Undo
Required Document 1	<input checked="" type="checkbox"/>	Open Template	https://webTest1.sallynet.org/ARMS_TEST_PH2/Documents/ReviewID_591/Updated Required Document 1.pdf	Submit Document	Undo

2. Click Undo



Only Ministry Unit Personnel with ARMS access or ARMS Coordinator can remove the previously submitted document and submit another one. The document file name will no longer be listed in the submitted documents until you submit a replacement for the required document.

In order to submit a new version, follow the steps in Submit Review Documents.

View Documents

If a document has been submitted by the Ministry Unit Personnel, it can be viewed by the Reviewers, Team Leader and Area Commander in View Documents.

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents **View Documents**

3. Click View Documents

Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Discovery Women's Centre		OCE	11/26/2018	11/27/2018				Team Selected	Test_TeamLeader1
Golden Years Residence		NLD	11/26/2018	11/27/2018				Scheduled	
Northern Lights CFS				11/13/2018			1, 2, 3, 4,	Reviewer Assigned	Test_TeamLeader1
Wellbeing Resource Hub		NLD	11/12/2018	11/13/2018			1, 2, 3, 4,	Chapter Configured	

1. Click desired MU

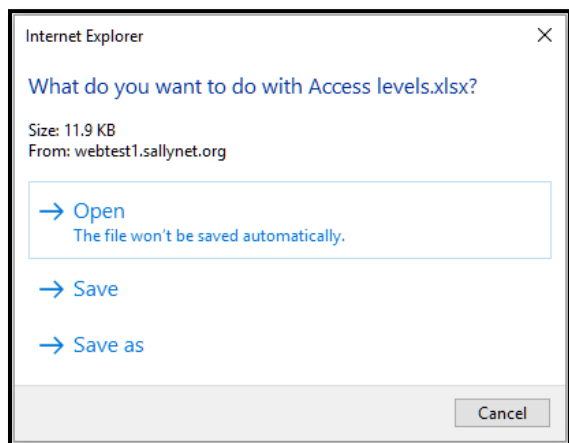
Review Documents

Close

Ministry Unit: Carmanville Corps
 MU Chapters: 1, 2, 3, 4
 Review Date: 11/12/2018 - 11/13/2018

Required Documents	Mandatory Documents	Submitted Documents	Submitted By	Document Link
011 - SAMS Reports for Previous 12 Months	<input type="checkbox"/>			
012 - Month-End Financial Statements (2 Recent Months)	<input checked="" type="checkbox"/>			
013 - Month-End Financial Statements (2 Recent Months)	<input checked="" type="checkbox"/>	https://webTest1.sallynet.org/ARMS_TEST_PHO/Documents/ReviewID_59/Financial Statement July 2018		View Document
014 - Staff List (Names and Positions)	<input type="checkbox"/>			
015 - Position Descriptions of Management Team	<input type="checkbox"/>			
Required Document 1	<input checked="" type="checkbox"/>	https://webTest1.sallynet.org/ARMS_TEST_PHO/Documents/ReviewID_59/Updated Required Document 1.pdf	MU User1	View Document

4. Click View Document



Click open, save or save as

Open – opens document
 Save – saves document to downloads folder
 Save as – saves document to location of user choice
 Cancel – cancels the download process

****If you select save as, you will have to select a location to save the document**

Ratings

There are standard rating sheets with each review that must be completed by the reviewers. The sheets are available and will be maintained within the system. The reviewer must assign a rating to the ministry unit. If a rating other than Substantial (S) is assigned to a particular standard, a comment explaining the rating must be input. To achieve accreditation status, a total of 80% must be earned in each and every chapter.

Weighting (whether the standard is regular, critical or high risk) serves as a factor in calculating the rating. The rating box presents the compliance scale providing choices for the reviewer. All ratings besides Substantial require the ministry unit to add a comment and formulate an action plan to improve the rating prior to the next scheduled review.

Rating

S - Substantial – All requirements in the standard are met
P - Partial – Many of the required elements are in place
M - Minimal – Few of the requirements are met
NC - Non-Compliant – Requirements are not fulfilled in any way
NA - Not-Applicable – This rating is used when a standard does not apply to the situation or circumstance under review

S	P	M	NC	NA
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Risk

Risk Level	High risk outcomes - Assigned a risk weight of 3
High Risk	Critical risk outcomes – Assigned a risk weight of 2
Regular	Regular risk outcomes – Assigned a risk weight of 1
Critical	

All outcomes scored as substantial will receive full weight for that outcome. (eg: substantial high risk would be scored 3, substantial critical would be scored 2, and substantial regular would be scored 1); If an outcome is assigned something other than substantial, the score would be less than full weight

Access Ratings

ARMS reviewers are required to enter ratings for each of the standards for the chapters they have been assigned to complete for the review.

Accreditation Reviews

Schedule Chapters Teams Reviewers **2. Click Ratings** Ratings Release Action Plan Close

Name	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Discovery Women's Centre	OCE	11/26/2018	11/27/2018				Team Selected	Test_TeamLeader1
Golden Years Residence	NLD	11/26/2018	11/27/2018				Scheduled	
Northern Lights CFS						1, 2, 3, 4,	Reviewer Assigned	Test_TeamLeader1
Wellbeing Resource Hub	NLD	11/12/2018	11/13/2018			1, 2, 3, 4,	Chapter Configed	

1. Click MU Name

If reviewers have not been assigned to chapters, and you try to access ratings, you will get a message similar to the messages below depending upon where you are in the review process.

Accreditation Reviews

NOTE: The chapter rating is not available yet. Current status is 'Team Selected'

Accreditation Reviews

NOTE: The chapter rating is not available yet. Current status is 'Chapter Configured'

Complete Ratings

ARMS Coordinators and Team Leaders will be able to see tabs for all chapters assigned to the review.

MU Chapters: 1, 2, 3, 4, 5, Review Date: 11/23/2018 - 11/23/2018

Ch1 Ch2 Ch3 Ch4 Ch5 Scores **Chapters ARMS Coordinator can view**

Chapter Rating

Chapter: 1 Governance & Management

Reviewer: Ratings Submitted

Section Name	Standard	Risk	Rating	Comment
Community Awareness	1.1.1	C	<input type="radio"/> S <input type="radio"/> P <input type="radio"/> M <input type="radio"/> NC <input type="radio"/> NA	

Ratings Completed

A reviewer will only see tabs for the chapters they are responsible to review

MU Chapters: 1, 2, 3, 4, 5, Review Date: 11/23/2018 - 11/23/2018

Ch2 Ch5 **Chapters assigned reviewer**

Chapter Rating

Chapter: 2 Employee Relations

Reviewer: Ratings Submitted test_reviewer1

Section Name	Standard	Risk	Rating	Comment
Human Resources Management	2.1.1	H	<input type="radio"/> S <input type="radio"/> P <input type="radio"/> M <input type="radio"/> NC <input type="radio"/> NA	
	2.1.2	R	<input type="radio"/> S <input type="radio"/> P <input type="radio"/> M <input type="radio"/> NC <input type="radio"/> NA	
Policies and Procedures	2.2.1	H	<input type="radio"/> S <input type="radio"/> P <input type="radio"/> M <input type="radio"/> NC <input type="radio"/> NA	
	2.2.2	H	<input type="radio"/> S <input type="radio"/> P <input type="radio"/> M <input type="radio"/> NC <input type="radio"/> NA	

Ratings Completed

Reviewers will enter ratings for all standards for the chapter. The information is saved automatically; if the reviewer select a rating other than S, a comment is required to save the rating. If the reviewer does not input a comment for a rating other than S, the data is not saved. To confirm all ratings and comments have been entered, click Refresh.

1. Click to select the rating for each standard
2. If rating is other than S, type a comment to explain why

MU Chapters: 1, 2, 3, 4, 5,
Review Date: 11/23/2018 - 11/23/2018

Ch2 Ch5

Chapter Rating

Chapter: 2 Employee Relations
Ratings Completed

Reviewer: test_reviewer1
Ratings Submitted

Section Name	Standard	Risk	Rating	Comment
Human Resources Management	2.1.1	H	<input type="radio"/> S <input type="radio"/> P <input type="radio"/> M <input type="radio"/> NC <input type="radio"/> NA	<input type="text"/> Changes saved
			<input type="radio"/> S <input type="radio"/> P <input type="radio"/> M <input type="radio"/> NC <input type="radio"/> NA	<input type="text"/> Place comment here Changes saved
Policies and Procedures	2.2.1	H	<input type="radio"/> S <input type="radio"/> P <input type="radio"/> M <input type="radio"/> NC <input type="radio"/> NA	<input type="text"/> Not saved! A comment is required
	2.2.2	H	<input type="radio"/> S <input type="radio"/> P <input type="radio"/> M <input type="radio"/> NC <input type="radio"/> NA	<input type="text"/> Changes saved

Ratings

Submit Approve Refresh Refresh Close

When the page has been refreshed, if all ratings and required comments have been entered, you will see a check in ratings completed. If you do not get a check in this box after refreshing, review the standards to ensure all information has been entered.

MU Chapters: 1, 2, 3, 4, 5,
Review Date: 11/23/2018 - 11/23/2018

Ch1 Ch2 Ch3 Ch4 Ch5 Scores

Chapter Rating

Chapter: 2 Employee Relations
 Ratings Completed
 Ratings Completed

Complete the above process for each chapter assigned to you as a reviewer. ARMS auto saves the ratings as you work through the system, so it is possible to exit and re-enter the Rating Sheet.

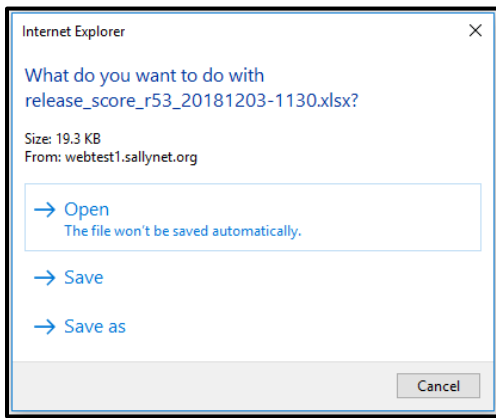
Print Details

If you would like to print the summary sheets for the review, you can complete this process in Review Sheets and Scores.

Ratings

Submit Approve Refresh Print Click Print

MU Chapters: 1, 2, 3, 4, 5,
Review Date: 11/23/2018 - 11/23/2018
Click the link to open. /ARMS_TEST_PH2/Excel/tmp/rating_r73_20181128-0907.xlsx

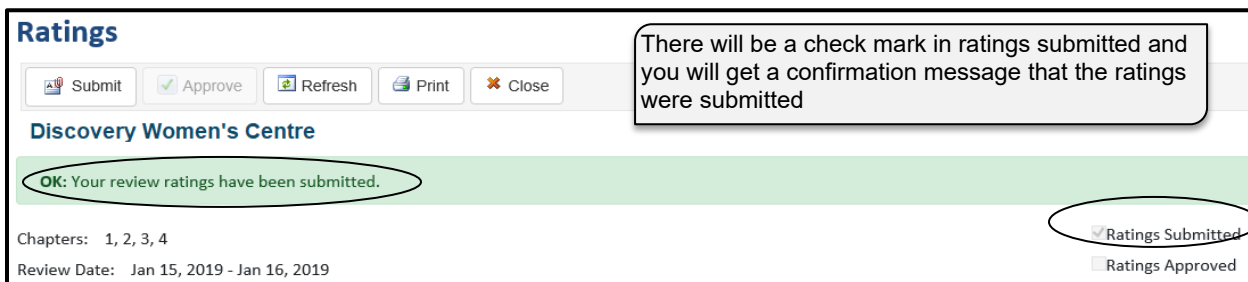
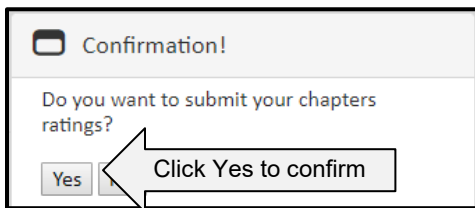
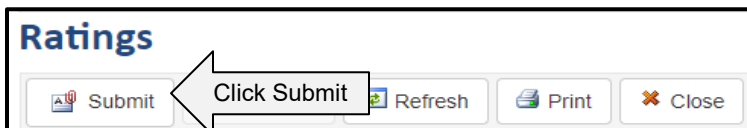


Open: opens the report
 Save: saves report to downloads
 Save as: save the report to location of choice

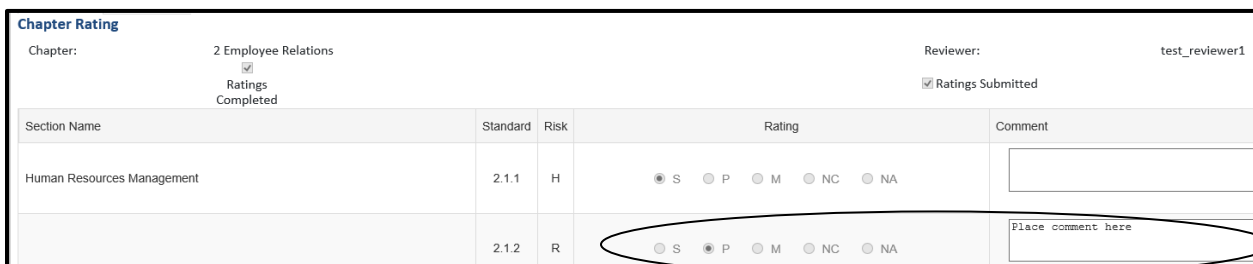
The file will open in Microsoft Excel; you can treat this as any Microsoft Excel document.

Submit Ratings

As a reviewer, you are responsible to complete ratings for each standard and for all chapters that have been assigned to you. All chapters assigned to the reviewer are to have completed ratings and required comments before the chapters can be submitted. Otherwise, the submit button is greyed out. You are to be in review ratings to submit the ratings. Once you have submitted review ratings, you will not be able to modify them.



Scores can no longer be modified, and all ratings and comments are greyed out.



The status on Accreditation Reviews page shows status as Chapter Rated.

Accreditation Reviews									
Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close									
Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	
			From: <input type="text"/>	To: <input type="text"/>					
>	Discovery Women's Centre	NLD	1/15/2019	1/16/2019			1, 2, 3, 4	Chapter Rated	
>	Northern Lights CFS	NLD	12/6/2018	12/6/2018	12/6/2018		1, 2, 3, 4	Conditional Pass accepted	

Approve Ratings

When all chapters have been rated by all reviewers, the ARMS Coordinator or the Team Leader will approve the ratings. You must be in Ratings to approve. You will see a check mark in Ratings Submitted; if you do not see this checked, you will not be able to approve the ratings. A team leader can modify the ratings before and after the ratings are approved.

Ratings

Submit Approve Click Approve

Lifebridge CFS

MU Chapters: 1, 2, 3, 4, 5, Ratings Submitted

Review Date: 11/23/2018 - 11/23/2018 Ratings Approved

If all chapters have not been scored and submitted, you will get this message.

Warning!

You must submit your chapters ratings.

Click OK to message and have reviewers proceed to score all chapters

When all chapters have been rated and submitted, you will successfully be able to approve the review. You will get this confirmation message.

Confirmation!

Do you want to approve the review ratings?

Click Refresh; you will see a check mark in Ratings Approved.

Ratings

Submit Approve Refresh

Lifebridge CFS

MU Chapters: 1, 2, 3, 4, 5, Ratings Submitted

Review Date: 11/23/2018 - 11/23/2018 Ratings Approved

Review Scores

When all chapters have been rated, submitted, and approved, the ARMS Coordinator and Team Leader can view the scores. When the review has been closed, the Area Commanders are able to view the scores. The scores show the percentage for each chapter as well as the percentage for each of the different risks categories.

Access Scores

Accreditation Reviews

Schedule Chapters Teams Reviewers **3. Click Ratings** Ratings Release Action Plan Close

Name <small>(Grouped MUs)</small>	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
		From: <input type="text"/> To: <input type="text"/>						
> Discovery Women's Centre	OCE	11/26/2018	11/27/2018				Team Selected	Test_TeamLeader1
Golden Years Residence	NLD	11/26/2018	11/27/2018				Scheduled	
Northern Lights CFS			11/13/2018			1, 2, 3, 4,	Reviewer Assigned	Test_TeamLeader1
Wellbeing Resource Hub	NLD	11/12/2018	11/13/2018			1, 2, 3, 4,	Chapter Configured	

2. Click MU Name

Ratings

Submit Approve Refresh Print Close

Discovery Women's Centre

NOTE: Review ratings are approved.

Chapters: 1, 2, 3, 4 Ratings Submitted
 Review Date: Jan 22, 2019 - Jan 23, 2019 Ratings Approved

Ch1 Ch2 Ch3 Ch4 **Scores**

Scores

Chapter #	Chapter Title	Score %	High Risk %	Critical %	Regular %
1	Governance & Management & kh	100.00	100.00	100.00	100.00
2	Employee Relations kh test	93.12	86.36	100.00	100.00
3	Facility	92.18	85.71	75.00	85.71
4	Spiritual & Religious Care	68.77	50.00	50.00	28.57

Rating for reviews

A chapter that has supplementary chapters, will only have one score displayed. This score is a calculated average which takes into account the main and supplementary ratings. The scores can be accessed after the ratings are submitted. In the ratings tab, after all the chapters have been completed, there is a "scores" tab to the right of the chapter tabs that shows the score of each chapter. The way you would show that there's only one score for all of chapter 3 is to create a review with at least one supplementary chapter 3, and in the scores tab, you should be able to see the supplementary chapter tab but only one combined score.

Release


When the ARMS Coordinator is satisfied with all aspects of the review, the review will be released.

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents **2. Click Release** Release Action Plan Close

Name <small>(Grouped MUs)</small>	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
		From: <input type="text"/> To: <input type="text"/>						
> Discovery Women's Centre	OCE	11/26/2018	11/27/2018				Team Selected	Test_TeamLeader1
Golden Years Residence	NLD	11/26/2018	11/27/2018				Scheduled	
Northern Lights CFS			11/13/2018			1, 2, 3, 4,	Reviewer Assigned	Test_TeamLeader1
Wellbeing Resource Hub	NLD	11/12/2018	11/13/2018			1, 2, 3, 4,	Chapter Configured	

1. Click MU Name

 Confirmation

Do you want to release this review?

3. Click Ok to confirm

Accreditation Reviews

If you try to release a review that has already been released, you will get a message similar to below.

NOTE: Review score has been released already. Current status is 'Score Released'

The status will be updated on the reviews list page to Score Released.

Accreditation Reviews									
Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close									
Name	Division	Started	Ended	Released	Closed	Chapters	Status		
<input type="text"/> <input type="text"/> From: <input type="text"/> To: <input type="text"/>									
> Rest Awhile Shelter	OCE	3/12/2019	3/13/2019				Scheduled		
> Lifebridge Resource Hub	OCE	1/7/2019	1/8/2019				Scheduled		
Northern Lights CFS	NLD	11/9/2018	11/9/2018	12/4/2018		1, 2, 3, 4,	Score Released		

Action Plan

After a review has been released, the Ministry Unit will review the ratings. The Ministry Unit personnel will be responsible for developing an action plan to address any standards that were not rated substantial or not-applicable.

If the action planner has not been assigned, the ratings have not been submitted and approved, or the review has not been released, individuals will not be able to access the action plan and will receive a message similar to the one below.

Accreditation Reviews

NOTE: You can not view this review until it is released. Current status is 'Reviewer Assigned'

Add Action Planner

The Review Coordinator or the Team Leader can assign the action planner to the review.

Accreditation Reviews									
Schedule Chapters Teams View Documents Sheets & Ratings Release Action Plan Close									
Name	Division	Started	Ended	Released	Closed	Chapters	Status	Leader	
<input type="text"/> <input type="text"/> From: <input type="text"/> To: <input type="text"/>									
Discovery Women's Centre	BCD	1/21/2019	1/21/2019			1, 2, 4, 5, 6, 13,	Chapter Configed	Test_TeamLeader2	
Lifebridge Community Church	BCD	1/16/2019	1/17/2019						
Ministry Group 2	OCE	12/27/2018	12/28/2018				Scheduled		

You will get a confirmation message that the action planner has been added to the review.

Team Selection

Discovery Women's Centre

NOTE: Added Planner to Action Plan: test_Discovery Centre, test_muCoord1

MU Chapters: 1, 2, 3-1, 4,
 Review Date: Apr 2, 2018 - Apr 3, 2018
 Team Lead: test teamleader1

Review

Available

- Test AreaCommander1
- test AreaCommander3
- test AreaCommander4
- test AreaCommander5
- Test Coordinator1

* Indicates that this user has a conflicting review for this date range.

Action Plan

Reviewers

- Test AreaCommander1
- Test AreaCommander2
- test AreaCommander3
- test AreaCommander4

3. Click to select Action Planner

Planners

- Check All
-
- test muCoord1
- Test MuCoord6

Selected

- Test AreaCommander2
- test reviewer1
- test teamleader1
- test teamleader2

4. Click Save Action Plan Team

Create Action Plan

After the Ministry Unit Personnel responsible for the action plan has been assigned to the review, the ratings have been submitted and approved, he/she can access the action plan.

The assigned action planner would log into the ARMS application and click Action Plan.

Accreditation Reviews

If the action plan is not ready to access because all chapters have not been rated, or you have already submitted the action plan, you will get a message.

Accreditation Reviews

NOTE: The action plan is not available. Current status is 'Chapter Rated'

Warning Message!

your action plan has already been submitted.

The ministry unit action planner will see the chapters that require an action plan. Each standard in the chapter that requires action will be listed.

Action Plan

Discovery Women's Centre
Review Date: Feb 25, 2019
Status: Initial Action Plan

Unit Lead: Vancouver_CFS, [Submit] [Resubmit to DHQ] [Resubmit to THQ]
Divisional Lead: test_AreaCommander4, [Approve] [Decline]
Team Lead: test_teamleader2, [Approve] [Decline]

Standards that are required
Chapter 1 Chapter 2 Chapter 3

3 Facility

Completed Submitted

Section Name	Standards	Rating	Comments	Action Step	Person(s) Responsible	Target Date	Completion Date
Housekeeping and Maintenance Services	3.4.1	NC	TR2 02/20/2019	Update standard to reflect our changes			
	3.4.2	NC	TR2 02/20/2019	Standard to be met by hiring new staff			
	3.4.4	NC	TR2 02/20/2019	Update to cleaning tools			
	3.4.5	P	TR2 02/20/2019	Carts to be updated to include moving arms			

Input the action step information for each of the standards to address the comments from the reviewers. You may assign the action step to a specific person and create a target completion date if desired. However, in order to save, the action step is the only requirement; save happens automatically

Click Submit

Action step

Saved

Ministry Unit Submit Action Plan

When you have entered an action step for each of the required standards, you can submit the action plan to DHQ.

Action Plan

Discovery Women's Centre
Review Date: Feb 25, 2019
Status: Initial Action Plan

Unit Lead: Vancouver_CFS, [Submit] [Resubmit to DHQ] [Resubmit to THQ]
Divisional Lead: test_AreaCommander4, [Approve] [Decline]
Team Lead: test_teamleader2, [Approve] [Decline]

Standards that are required
Chapter 1 Chapter 2 Chapter 3

3 Facility

Completed Submitted

Section Name	Standards	Rating	Comments	Action Step	Person(s) Responsible	Target Date	Completion Date
Housekeeping and Maintenance Services	3.4.1	NC	TR2 02/20/2019	Update standard to reflect our changes			
	3.4.2	NC	TR2 02/20/2019	Standard to be met by hiring new staff			
	3.4.4	NC	TR2 02/20/2019	Update to cleaning tools			
	3.4.5	P	TR2 02/20/2019	Carts to be updated to include moving arms			

Click Submit

Action step

You will get a message confirming action plan has been submitted and there will be a check mark in submit

Confirmation!

Do you want to submit your action plan?

Yes [Click Yes]

Action Plan

Discovery Women's Centre
Review Date: Jan 22, 2019
Status: Action Plan Submitted (DHQ)

Unit Lead: test_muCoord10, [Submit] [Resubmit to DHQ] [Resubmit to THQ]
Jan 24, 2019

The status is updated to show action plan submitted to DHQ.

Accreditation Reviews									
Schedule	Chapters	Teams	Reviewers	Add Documents	View Documents	Ratings	Release	Action Plan	Close
Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	
>	Discovery Women's Centre	NLD	1/22/2019	1/23/2019	1/23/2019		1, 2, 3, 4	Action Plan Submitted (DHQ)	

If you now go into action plan, everything is greyed out and cannot be edited.

Chapter 1 Chapter 2 Chapter 3						
3 Facility						
Section Name	Standards	Rating	Comments	Action Step	Person(s) Responsible	
Housekeeping and Maintenance Services	3.4.1	NC	TR2 02/20/2019	Update standard to reflect our changes		
	3.4.2	NC	TR2 02/20/2019	Standard to be met by hiring new staff		
	3.4.4	NC	TR2 02/20/2019	Update to cleaning tools		

If you try to submit the action plan and have not completed all requirements for chapters of the action plan, you will get a message similar to below. Review the action plan to ensure each listed standard has a action step listed.

Action Plan

Print Close Refresh

Discovery Women's Centre

Review Date: Jan 15, 2019
Status: Initial Action Plan

NOTE: The action plan is not ready. You must complete all action plan items in each chapter.

If you are not a Ministry Unit action plan planner, a DHQ action plan reviewer, team lead for the review or an ARMS coordinator, you will not be able to access the action plan and will receive a message similar to the one below.

Accreditation Reviews

NOTE: You are not authorized to access the Action Plan

Divisional Approval of Action Plan

The DHQ action plan reviewer must approve the action plan so that it is then available to THQ team lead. If a team member attempts to access the action plan before it has been approved by the DHQ action plan approver, a message similar to the message below will be displayed.

Accreditation Reviews

NOTE: The action plan is not available to view because it has not been submitted to THQ yet.

The DHQ action plan reviewer will select the Ministry Unit from the reviews list, and click action plan. The DHQ action plan reviewer will review the action plan as outlined by the Ministry Unit action planner and will approve the action plan.

Action Plan

Print Close Refresh

Northern Lights CFS
Review Date: 11/09/2018
Status: Action Plan Submitted (to DHQ)

Unit Lead: test_muCoord11, Divisional Lead: test_AreaCommander2, Team Lead: Test_TeamLeader2

Submit 12/04/2018
Resubmit to DHQ
Resubmit to THQ

Approve Decline
Approve Decline

Confirmation!

Do you want to approve the action plan?

Yes **Click Yes**

Approve has a check mark and the date is displayed

Divisional Lead: test_AreaCommander2,

Approve 12/04/2018
Decline

The status is updated to show DHQ Approved.

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close

Name	Division	Started	Ended	Released	Closed	Chapters	Status
Wellbeing Resource Hub	NLD	9/20/2018	9/21/2018	12/3/2018		1, 2, 3, 4,	THQ Approved Action Plan
Northern Lights CFS	NLD	11/9/2018	11/9/2018	12/4/2018		1, 2, 3, 4,	DHQ Approved

If you now go into action plan, everything is greyed out and cannot be edited.

Chapter 1 Chapter 2 Chapter 3

3 Facility

Completed Submitted

Section Name	Standards	Rating	Comments	Action Step	Person(s) Responsible
Housekeeping and Maintenance Services	3.4.1	NC	TR2 02/20/2019	Update standard to reflect our changes	
	3.4.2	NC	TR2 02/20/2019	Standard to be met by hiring new staff	
	3.4.4	NC	TR2 02/20/2019	Update to cleaning tools	

Divisional Decline of Action Plan

The DHQ action plan approver can decline the action plan outlined by the Ministry Unit if it is not satisfactory.

Action Plan

Print Close Refresh

Northern Lights CFS
Review Date: 11/09/2018
Status: Action Plan Submitted (to DHQ)

Unit Lead: test_muCoord11, 12/04/2018
 Submit
 Resubmit to DHQ
 Resubmit to THQ

Divisional Lead: test_AreaCommander2,
 Approve
 Decline

Team Lead: Test_TeamLeader2
 Approve
 Decline

Open the action plan and click decline

Confirmation!

Do you want to decline the action plan?

Yes No

Click Yes

Decline has a check mark and the date is displayed

Divisional Lead: test_AreaCommander2,
 Approve
 Decline

12/06/2018

The status is updated to show DHQ Declined and further development is required from the Ministry Unit on the action plan.

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close

Name	Division	Started	Ended	Released	Closed	Chapters	Status
> Northern Lights CFS	NLD	12/6/2018	12/6/2018	12/6/2018		1, 2, 3, 4,	Further Development Required (DHQ Declined)

Action plan standards can now be edited in preparation for resubmitting the action plan to DHQ.

3 Facility

Completed Submitted

Section Name	Standards	Rating	Comments	Action Step	Person(s) Responsible
Housekeeping and Maintenance Services	3.4.1	NC	TR2 02/20/2019	Update standard to reflect our changes	
	3.4.2	NC	TR2 02/20/2019	Standard to be met by hiring new staff	
	3.4.4	NC	TR2 02/20/2019	Update to cleaning tools	

Resubmit Action Plan to DHQ

If the original action plan is not approved by DHQ personnel, the Ministry Unit can update the action plan based on comments from DHQ. When the action planner has made the changes to the action plan as requested, the action plan can be resubmitted to DHQ for another assessment.

Action Plan

Print Close Refresh

Northern Lights CFS

Review Date: 12/06/2018
Status: Further Development Required (DHQ Declined)

Unit Lead: test_muCoord7, Divisonal Lead: test_AreaCommander2,

Submit 12/06/2018
 Resubmit to DHQ ← Click Resubmit to DHQ
 Resubmit to THQ

Approve
 Decline 12/06/2018

Standards that are required

Chapter 1 Chapter 2 Chapter 3 Chapter 4

Confirmation!

Do you want to re-submit your action plan to DHQ?

Yes ← Click Yes to confirm

Resubmit to DHQ has a check mark and the date is displayed

Unit Lead: test_muCoord7,

Submit
 Resubmit to DHQ
 Resubmit to THQ

12/06/2018
 12/06/2018

The Accreditation Review list will be updated to indicate the action plan has been resubmitted to DHQ.

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close

Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status
>	Discovery Women's Centre	NLD	1/15/2019	1/16/2019	1/25/2019		1, 2, 3, 4	Action Plan Re-submitted (DHQ)
>	Destiny Community Church	PRA	12/6/2018	12/6/2018	12/6/2018		1, 2, 3, 4	Conditional Pass accepted
>	Northern Lights CFS	ABD						

The DHQ action plan reviewer will again review the action plan from the Ministry Unit and approve the plan by clicking the approve button. There will be an update to show the action plan was approved.

Divisonal Lead: test_AreaCommander2,

Approve
 Decline

12/10/2018
 12/06/2018

THQ Approval of Action Plan

When the DHQ action plan reviewer has approved the Ministry Unit action plan, the action plan will be available to the team lead for review and approval.

When the DHQ action plan approver has approved the action plan, the Team Leader will select the Ministry Unit from the reviews list, and click action plan. The Team Leader will review the action plan as outlined by the Ministry Unit action plan planner and approved by the DHQ action plan reviewer. The Team Leader will approve the action plan.

Action Plan

Print Close Refresh

Discovery Women's Centre
 Review Date: Feb 25, 2019
 Status: DHQ Approved

Unit Lead: Vancouver_CFS, Divisional Lead: test_AreaCommander4, Team Lead: test_teamleader2

Submit Mar 25, 2019
 Resubmit to DHQ
 Resubmit to THQ

Approve Mar 25, 2019
 Decline

Approve
 Decline

Standards that are required
 Chapter 1 Chapter 2 Chapter 3

1 Governance & Management

Completed Submitted

Section Name	Standards	Rating	Comments	Action Step	Person(s) Responsible	Target Date
Community Awareness	1.1.2	P	TAC2 02/20/2019	Become more community aware		
Management Practices	1.5.1	P	TAC2 02/20/2019	Economic incentives		
	1.5.2	P	TAC2 02/20/2019	Provide meaningful feedback to employees		

You will see a check mark in approve and the date it was approved

Confirmation!

Do you want to approve the action plan?

Yes Click Yes

Team Lead: Test Teamleader

Approve
 Decline

12/03/2018

The status is updated to show THQ Approved.

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close

Name	Division	Started	Ended	Released	Closed	Chapters	Status
Wellbeing Resource Hub	NLD	9/20/2018	9/21/2018	12/3/2018		1, 2, 3, 4	THQ Approved Action Plan
Northern Lights CFS	NLD	11/9/2018	11/9/2018	12/4/2018		1, 2, 3, 4	DHQ Approved

If you now go into action plan, everything is greyed out and cannot be edited.

Chapter 1 Chapter 2 Chapter 3						
1 Governance & Management						
✓Completed ✓Submitted						
Section Name	Standards	Rating	Comments	Action Step	Person(s) Responsible	
Community Awareness	1.1.2	P	TAC2 02/20/2019	Become more community aware		
Management Practices	1.5.1	P	TAC2 02/20/2019	Economic incentives		
	1.5.2	P	TAC2 02/20/2019	Provide meaningful feedback to employees		

THQ Decline of Action Plan

The THQ Team Leader can decline the action plan outlined by the Ministry Unit and approved by the DHQ action plan approver if it is not satisfactory.

Action Plan

Print Close Refresh

Northern Lights CFS

Review Date: 12/06/2018

Status: DHQ Approved

Open the action plan and click decline

Unit Lead: test_muCoord7, Divisional Lead: test_AreaCommander2, Team Lead: Test_TeamLeader2

<input checked="" type="checkbox"/> Submit 12/06/2018 <input checked="" type="checkbox"/> Resubmit to DHQ 12/06/2018 <input type="checkbox"/> Resubmit to THQ	<input checked="" type="checkbox"/> Approve 12/06/2018 <input checked="" type="checkbox"/> Decline 12/06/2018	<input type="checkbox"/> Approve <input checked="" type="checkbox"/> Decline
---	--	---

Confirmation!

Do you want to decline the action plan?

Yes Click Yes

You will see a check mark in decline and the date it was declined

Team Lead: Test_TeamLeader2

<input type="checkbox"/> Approve <input checked="" type="checkbox"/> Decline	12/07/2018
---	---

The status is updated to show THQ Declined and further development is required from the Ministry Unit on the action plan.

Accreditation Reviews									
Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close									
Name	Division	Started	Ended	Released	Closed	Chapters	Status		
From: <input type="text"/> To: <input type="text"/>									
> Northern Lights CFS	NLD	12/6/2018	12/6/2018	12/6/2018		1, 2, 3, 4,	Further Development Required (THQ Declined)		
Women's Discovery Centre	NLD	9/3/2018	9/4/2018			2,	Rating Submitted		

Action plan standards can now be edited in preparation for resubmitting the action plan to THQ.

Chapter 1 Chapter 2 Chapter 3						
1 Governance & Management						
✓Completed ✓Submitted						
Section Name	Standards	Rating	Comments	Action Step	Person(s) Responsible	
Community Awareness	1.1.2	P	TAC2 02/20/2019	Become more community aware		
Management Practices	1.5.1	P	TAC2 02/20/2019	Economic incentives		
	1.5.2	P	TAC2 02/20/2019	Provide meaningful feedback to employees		

2 Employee Relations					
Section Name	Standards	Rating	Comments	Action Plan	Responsible Person
Human Resources Management	2.1.1	P	LG-6/12/2018	LG - Another attempt to resolve issue	
Human Resources Management	2.1.2	M	LG-6/12/2018	LG - Another attempt to resolve issue	
Policies and Procedures	2.2.1	M	LG-6/12/2018	LG - Another attempt to resolve issue	

Resubmit Action Plan to THQ

If the action plan is approved by DHQ and submitted to THQ, THQ can decline the action plan. When the action planner has made the changes to the action plan, the action plan can be resubmitted to THQ for another assessment. The action plan is submitted directly to THQ.

Action Plan

Print Close Refresh

Northern Lights CFS

Review Date: 12/06/2018

Status: Further Development Required (THQ Declined)

Unit Lead: test_muCoord7, Divisional Lead: test_AreaCommander2,

<input checked="" type="checkbox"/>	Submit	12/06/2018
<input checked="" type="checkbox"/>	Resubmit to DHQ	12/06/2018
<input type="checkbox"/>	Resubmit to THQ	

Standards that are required

Chapter 1 Chapter 2 Chapter 3 Chapter 4

Click Resubmit to THQ

Resubmit to THQ has a check mark and the date is displayed

Confirmation!

Are you sure you want to resubmit your action plan to THQ?

Yes

Click Yes to confirm

Unit Lead: test_muCoord7,

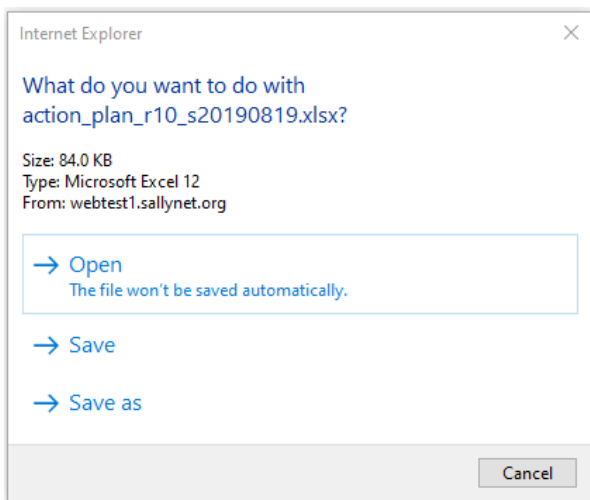
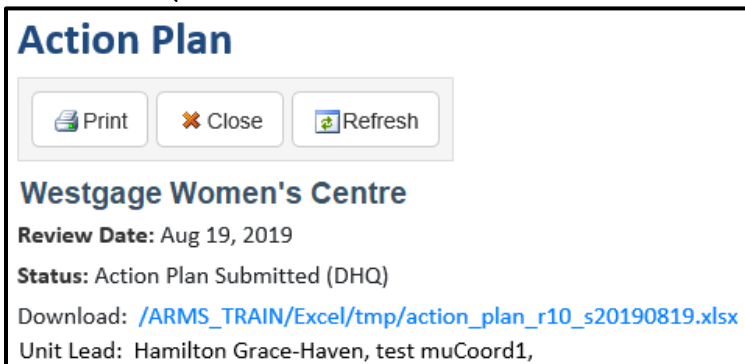
<input checked="" type="checkbox"/>	Submit	12/06/2018
<input checked="" type="checkbox"/>	Resubmit to DHQ	12/06/2018
<input checked="" type="checkbox"/>	Resubmit to THQ	12/07/2018

Accreditation Reviews									
Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close									
Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	
>	Comer Brook CFS	NLD	1/15/2019	1/16/2019	1/25/2019		1, 2, 3, 4	Action Plan Re-submitted (THQ)	

Download Action Plan

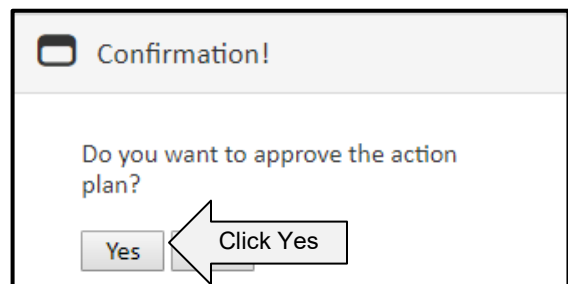
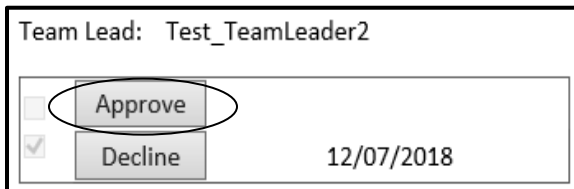
If you want to view the action plan outside of the application, it can be downloaded as an Excel file.

1. Open the action plan by clicking Action Plan button

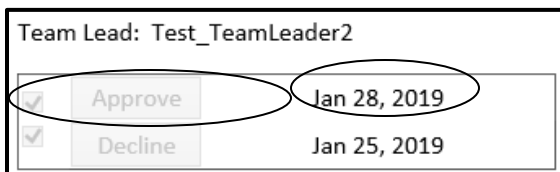


6. Open, save or select save as for excel file
 Open: Open file
 Save: saves to download folder automatically
 Save as: choose where to save file

The THQ Team Leader will again review the action plan from the Ministry Unit and approve the plan by clicking the approve button.



There will be an update to show the action plan was approved.



The status is updated to show THQ Approved.

Accreditation Reviews									
Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close									
Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	
			From: <input type="text"/>	To: <input type="text"/>					
Wellbeing Resource Hub		NLD	9/20/2018	9/21/2018	12/3/2018		1, 2, 3, 4,	THQ Approved Action Plan	
Northern Lights CFS		NLD	11/9/2018	11/9/2018	12/4/2018		1, 2, 3, 4,	DHQ Approved	

Action Plan Notes

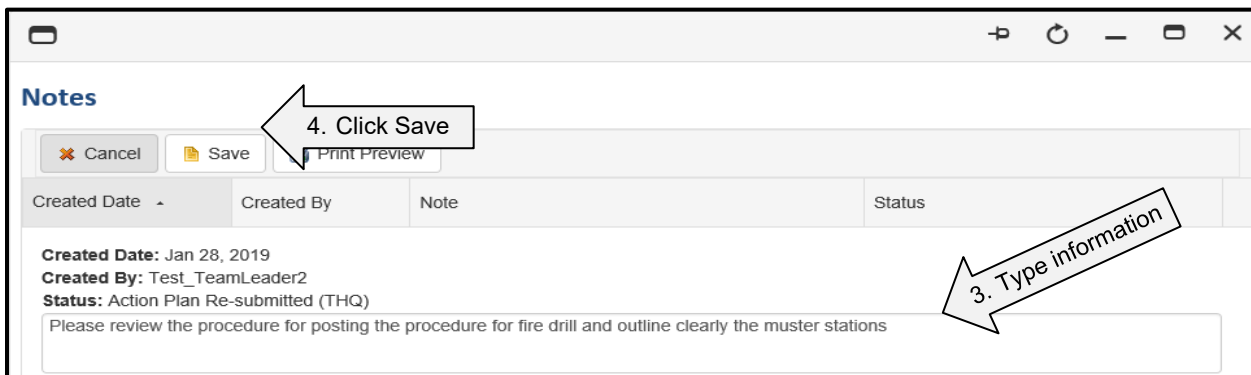
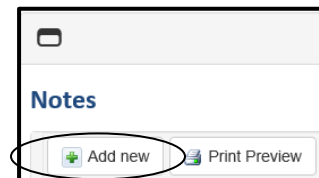
DHQ and THQ review team members can enter notes for the Ministry Unit if they want to question or make a recommendation on the action plan. The notes can then be viewed by Ministry Unit action plan planners.

Create Action Plan Notes

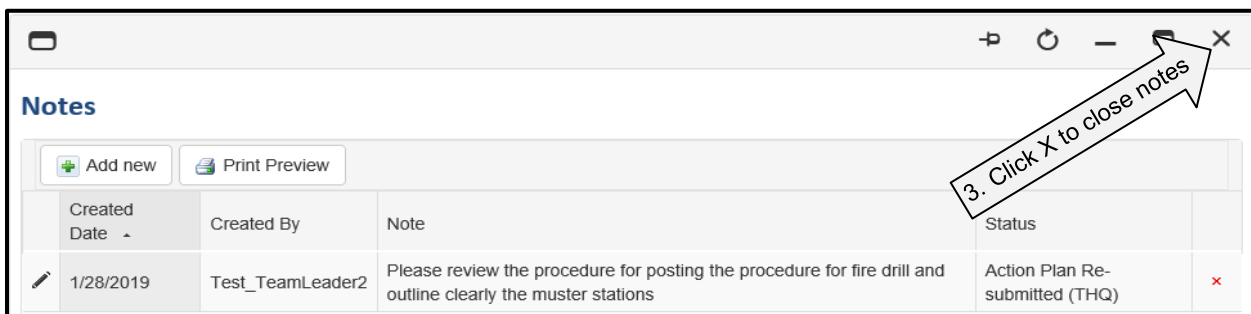
1. Open the action plan and click Note



2. Click Add new



The note is now available for Ministry Unit and THQ to view

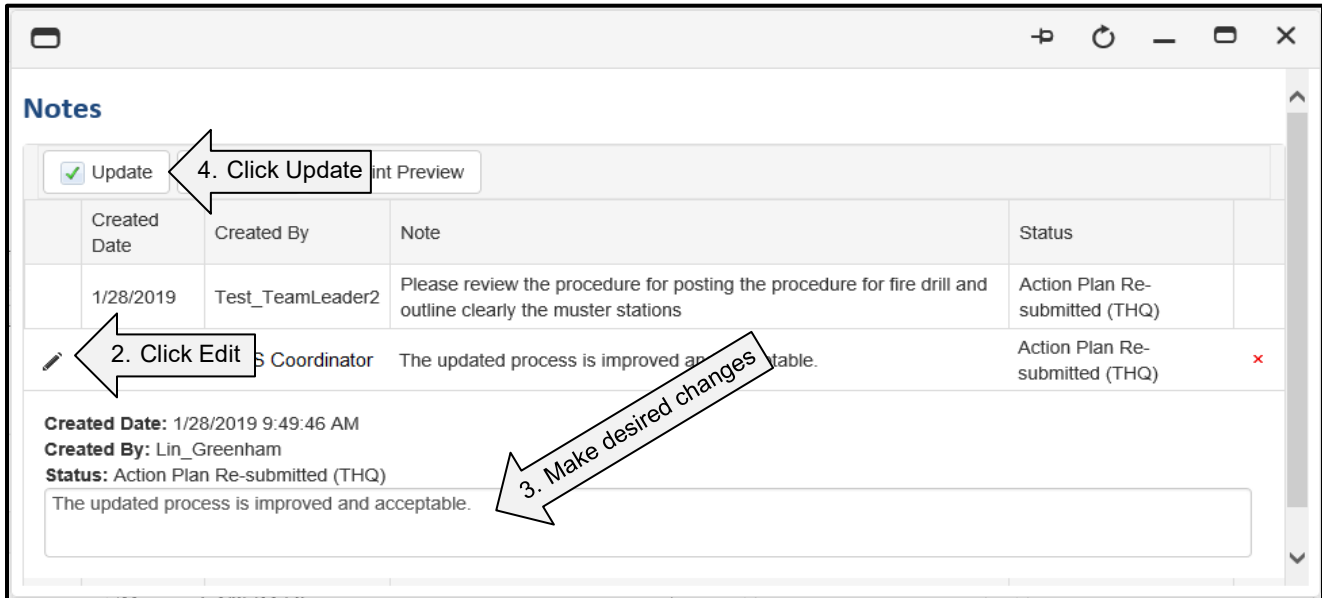


Edit Action Plan Notes

Action plan notes can be edited by the individual that created the note. No person can edit notes created by another person.



1. Open the action plan and click Note



Notes

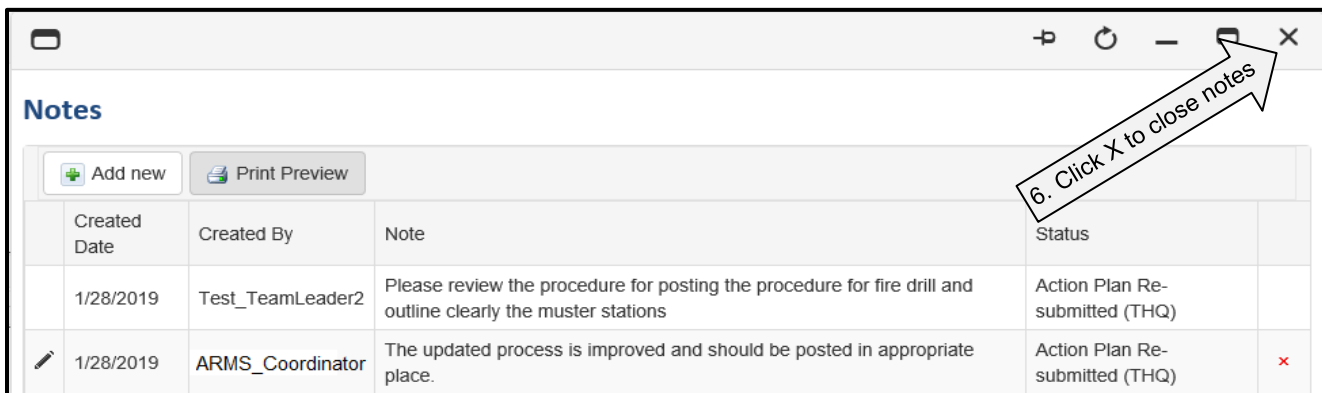
Update Print Preview

Created Date	Created By	Note	Status
1/28/2019	Test_TeamLeader2	Please review the procedure for posting the procedure for fire drill and outline clearly the muster stations	Action Plan Re-submitted (THQ)
	ARMS_Coordinator	The updated process is improved and acceptable.	Action Plan Re-submitted (THQ)

Created Date: 1/28/2019 9:49:46 AM
Created By: Lin_Greenham
Status: Action Plan Re-submitted (THQ)

The updated process is improved and acceptable.

You will now be able to view your changes to notes



Notes

Add new Print Preview

Created Date	Created By	Note	Status
1/28/2019	Test_TeamLeader2	Please review the procedure for posting the procedure for fire drill and outline clearly the muster stations	Action Plan Re-submitted (THQ)
1/28/2019	ARMS_Coordinator	The updated process is improved and should be posted in appropriate place.	Action Plan Re-submitted (THQ)

View Action Plan Notes

The Ministry Unit, DHQ and THQ can view action plan notes. DHQ and THQ can enter action plan notes but the Ministry Unit cannot.

1. Open the action plan and click Note
2. View each desired note
3. Click X to close notes

Created Date	Created By	Note	Status
1/28/2019	Test_TeamLeader2	Please review the procedure for posting the procedure for fire drill and outline clearly the muster stations	Action Plan Re-submitted (THQ)
1/28/2019	ARMS_Coordinator	The updated process is improved and should be posted in appropriate place.	Action Plan Re-submitted (THQ)

Print Action Plan Notes

All review team members can print the action plan notes.

1. Open the action plan and click Note
2. Click Print Preview

6. Click X to close notes

Created Date	Created By	Note	Status
12/6/2018	test_AreaCommander2	Please review the procedure for posting the procedure for fire drill and outline clearly the muster stations. Include a location map.	Further Development Required (DHQ Declined)

3. Click Print

Action Plan Notes
Arnold's Cove Corps

Review Start: Dec 06, 2018
Review End: Dec 06, 2018

Notes

Created: Dec 06, 2018 @ 10:29 AM
User: test_AreaCommander2
Status: Further_Development_Required_DHQ_Declined
Note: Please review the procedure for posting the procedure for fire drill and outline clearly the muster stations. Include a location map.

4. Select printer

5. Click Print

Print

Delete Action Plan Notes

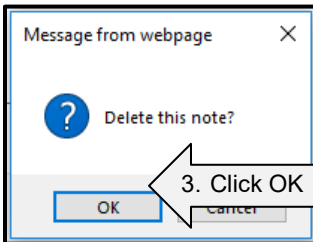
Action plan notes can be deleted by the individual that created the note. No person can delete notes created by another person.



Note

1. Open the action plan and click Note

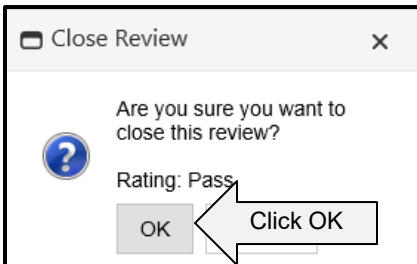
Created Date	Created By	Note	Status
1/28/2019	Test_TeamLeader2	Please review the procedure for posting the procedure for fire drill and outline clearly the muster stations	Action submitted (THQ)
1/28/2019	ARMS_Coordinator	The updated process is improved and should be posted in appropriate place.	Action Plan Re-submitted (THQ)



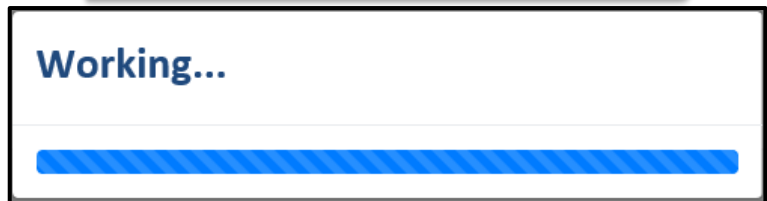
Close Review

When the team lead has approved the action plan for the Ministry Unit, the ARMS Coordinator will close the review. From the Accreditation reviews page, click Close.

Name	Division	Started	Ended	Released	Closed	Chapters	Status
Rest Awhile Shelter	OCE	3/12/2019	3/13/2019				Scheduled
Discovery Women's Shelter	OCE	1/7/2019	1/8/2019				Scheduled
Northern Lights CFS	NLD	9/20/2018	9/21/2018	12/3/2018		1, 2, 3, 4,	THQ Approved Action Plan



You will get this message while the close is finalized



When the process is completed you will see an update on the conditional pass review page.

Conditional Pass Reviews									
<input type="button" value="Schedule"/> <input type="button" value="Reviewers"/> <input type="button" value="Ratings"/> <input type="button" value="Close"/>									
Name	Division	Review Start	Review End	Chapters	Leader	Status	Accepted		
<input type="text"/> <input type="text"/>		From: <input type="text"/>	To: <input type="text"/>						
Loving Memories Adult Resource Centre	ALB	2/4/2019	2/5/2019	4	test_teamleader1	Conditional Pass Review Closed	Accepted		
Lifebridge Community Church	OCE	2/4/2019	2/4/2019	4	test_teamleader1	Conditional Pass Review Closed	Accepted		
Discovery Women's Centre	NLD	1/29/2019	1/29/2019	3	test_teamleader2	Conditional Pass Review Closed	Accepted		

If you try to close a review that is already closed, you will receive a message similar to the one below.

Accreditation Reviews

NOTE: This review has been closed already.

If a Ministry Unit qualifies for the conditional pass process, the review cannot be closed until a decision has been made regarding the conditional pass offered. When the ARMS Coordinator attempts to close the review, they will receive a message that the Ministry Unit is eligible for a conditional review.

Accreditation Reviews

NOTE: This review can not be closed because it is eligible for a conditional pass review.

Conditional Pass

A conditional pass offers the ministry unit another chance to gain accreditation. It is a process that occurs between the Ministry Unit and THQ. DHQ is not involved in the conditional pass process unless a member of DHQ is a reviewer assigned to the conditional pass.

Requirements of a Conditional Pass

To receive accreditation status during a review, the Ministry Unit is required to attain eighty percent or higher in each chapter it has been rated. If these ratings are not achieved, a conditional pass may be offered to the Ministry Unit. To be offered a conditional pass, the Ministry Unit will have scored between seventy and eighty percent on no more than two chapters in which the unit was evaluated during the accreditation review. If a Ministry Unit scored less than seventy percent on any chapter or they scored less than eighty percent on three or more chapters, no conditional review is offered to the Ministry Unit.

Accept Conditional Pass

If a Ministry Unit does not meet required standards for accreditation following a review but qualifies for a conditional review, they will be able to view this option from the review list screen when they log into ARMS. The status will show Conditional Pass Offered.

Accreditation Reviews										
<input type="button" value="Schedule"/> <input type="button" value="Chapters"/> <input type="button" value="Teams"/> <input type="button" value="Reviewers"/> <input type="button" value="Add Documents"/> <input type="button" value="View Documents"/> <input type="button" value="Ratings"/> <input type="button" value="Release"/> <input type="button" value="Action Plan"/> <input type="button" value="Close"/>										
Name	Division	Started	Ended	Released	Closed	Chapters	Status			
<input type="text"/> <input type="text"/>		From: <input type="text"/>	To: <input type="text"/>							
▶ Northern Lights CFS	NLD	1/3/2019	1/4/2019	12/5/2018		1, 2, 3, 4,	Conditional Pass offered			

Upon clicking the arrow, the view is expanded to show the details of the original review. If the Ministry Unit wants to accept the offer of conditional pass, they will inform the accreditation coordinator at THQ.

Accreditation Reviews									
Schedule	Chapters	Teams	Reviewers	Add Documents	View Documents	Ratings	Release	Action Plan	Close
Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	
			From: <input type="text"/>	To: <input type="text"/>					
▼	Northern Lights CFS	NLD	1/3/2019	1/4/2019	12/5/2018		1, 2, 3, 4,	Conditional Pass offered	
	Started	Ended	Closed	Chapters	Team Leader	Conditional Pass			
	9/20/2018	9/21/2018	12/4/2018	1, 2, 3, 4,	Test Teamleader			<input type="checkbox"/>	

When the ARMS coordinator assigned to the review has been notified of the Ministry Unit's decision to accept the conditional review offer, that individual will make the selection in the ARMS application and begin the process of preparing for the conditional review.

Workflow Admin Reports Tools Sign Out

Reviews
Conditional Pass Review
 Schedule Tracking

1. Click Workflow>Conditional Pass Review

Conditional Pass Reviews								
Schedule	Reviewers	Ratings	Close					
Ministry Unit	Division	Review Start	Review End	Chapters	Leaders	Status	Accepted	
		From: <input type="text"/>	To: <input type="text"/>					
Golden Year Residence	OCE	2/4/2019	2/4/2019	4,	test_teamleader1	Reviewer Assigned	In Progress	▼
Destiny Community Church	OCE	2/4/2019	2/4/2019	4,	test_teamleader1	Conditional Pass Review Closed	Accepted	
Northern Lights CFS	NLD			1,	test_teamleader2	Conditional Pass offered	Choose	▼
Discovery Women's Centre	ALB			2,	Test_TeamLeader1	Review Closed	Declined	

2. Click drop-down to select accept

Accept
Decline
Choose

Message from webpage

? Are you sure you want to accept the Conditional Pass review offer?

OK Cancel

3. Click OK to confirm accept

Conditional Pass accepted
In Progress

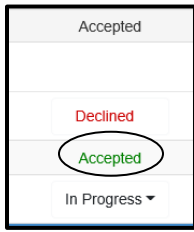
4. Status shows conditional pass accepted and in progress

Conditional Review Process

The ARMS Coordinator will schedule a time for the review and select a reviewer(s) for the chapter(s) that the Ministry Unit scored between seventy and eighty percent on. The process then begins again for the reviewer(s) to rate the standards that the Ministry Unit did not meet the requirements for in the original review.

The conditional review is an interaction between the Ministry Unit and THQ; DHQ is no longer a part of this process. There is also no opportunity for the Ministry Unit to create another action plan if all standards are not rated as substantial. The reviewer(s) will complete and submit the ratings. The ARMS Coordinator will approve the ratings and close the review.

From the menu, click Workflow, Conditional Pass Review. The ARMS Coordinator will schedule a date for the conditional review and select reviewers for the conditional review. The reviewers will rate and submit the chapter(s) that the Ministry Unit did not meet the standards. Then the ARMS Coordinator will close the review as per usual.



When the review is closed, the status is updated to Accepted

Displayed on the reviews home screen, if you click the arrow in front of desired Ministry Unit, you will see the history for the original review, the conditional pass review and the updated review results after the conditional pass.

Click desired review and click the ratings button to view the scores for the selected review.

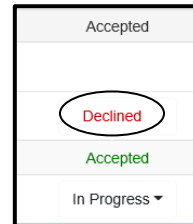
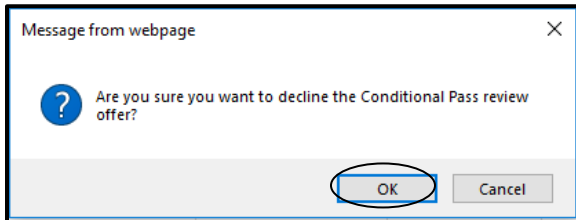
Started	Ended	Closed	Chapters	Team Leader	Conditional Pass
1/3/2019	1/4/2019	1/8/2019	1, 2, 3, 4,	Test_TeamLeader2	<input type="checkbox"/>
1/30/2019	1/30/2019	2/4/2019	1,	Test_TeamLeader2	<input checked="" type="checkbox"/>
9/20/2018	9/21/2018	12/4/2018	1, 2, 3, 4,	Test_Teamleader1	<input type="checkbox"/>

Decline Conditional Pass

A Ministry Unit is not required to accept the conditional pass offer. If they choose to decline the offer, they will inform the THQ coordinator; the THQ coordinator will select decline on the conditional pass and the scores from the original review will remain in effect. The process is now final.

Click OK to dismiss the message

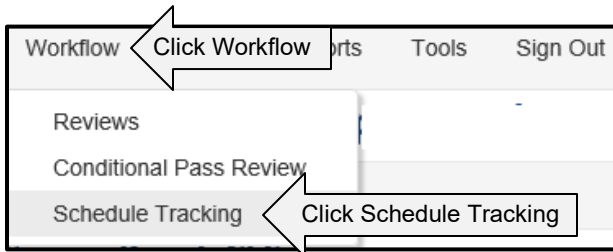
The status shows as declined



Schedule Tracking

The schedule tracking process is carried out by ARMS Coordinator or Review Scheduler. It tracks the dates of the administrative tasks that have to be completed during the review process. Many of the dates are predetermined and autocompleted based on the review date and can be checked off once completed.

Access Schedule Tracking



Prefilled Dates

- Notification letter – 12 weeks prior to review date
- Reminder notice – 7 weeks prior to review date
- Materials due – 5 weeks prior to review date
- E-Mail documents– 2 weeks prior to review date

Mailing summary – 3 weeks after review date
 Action plan reminder - 12 weeks after review date
 Action plan received - 15 weeks after review date

Confirm dates

There is a confirm date column to indicate that the information has been completed and/or mailed for many of the prefilled dates. These include:

- Notification letter date
- Reminder notice date
- Materials sent date
- Email documents sent date
- Mailing summary sent date
- Action plan reminder sent date
- Action Plan received date

Locate the desired Ministry Unit by using the search fields

Note: When you type into the search field, you have to click the mouse off that field to activate the search

The actual dates can be completed manually. The prefilled dates can also be modified

Click the date field to change it.

Schedule Tracking NOTE: All dates are in MM/DD/YYYY format

Save X **2. Click Save**

Ministry Unit	CP	Start	End	Division	Team Lead	Contact	Notification Letter		Reminder Notice		Materials		Email Documents	
							Send By	Sent	Send By	Sent	Due By	Received	Email By	Emailed
Regina Haven of Hope Ministries		4/11/2018	4/12/2018	PRA							3/7/2018		3/28/2018	
Journey to Life Centre		5/29/2018	5/31/2018	OGL	Alexis_Hell		3/6/2018		4/10/2018		4/24/2018		5/15/2018	
Winnipeg Golden West Centennial Lodge		6/18/2018	6/19/2018	PRA	Alexis_Hell		3/26/2018		4/30/2018		5/14/2018		6/4/2018	
Sudbury New Life Centre		6/27/2018	6/28/2018	OGL	Tiffany_Kwok		4/4/2018		5/9/2018		5/23/2018		6/13/2018	

1. Type date or select date from calendar

Schedule Tracking NOTE: All dates are in MM/DD/YYYY format

Save X **2. Click Save**

Ministry Unit	CP	Start	End	Division	Team Lead	Contact	Notification Letter		Reminder Notice		Materials		Email Documents	
							Send By	Sent	Send By	Sent	Due By	Received	Email By	Emailed
Regina Haven of Hope Ministries		4/11/2018	4/12/2018	PRA	Tiffany_Kwok		1/17/2018		2/21/2018		3/7/2018		3/28/2018	
Journey to Life Centre									4/10/2018		4/24/2018		5/15/2018	
Winnipeg Golden West Centennial Lodge		6/18/2018	6/19/2018	PRA	Alexis_Hell		3/26/2018		4/30/2018		5/14/2018		6/4/2018	

1. Type new prefilled date or select date from calendar

Reports

The ARMS application has a variety of reports available. The reports include Ministry Unit reports, summary reports and business intelligence reports. The report format is Microsoft Excel and may be treated as any Excel file.

The summary sheet reports will have the ratings and comments for each individual standard in a review. The final scores report will include the percentage score given to each chapter in a review.

Ministry Unit Reports

The Ministry Unit reports are automatically generated when the review is released and closed. There are four reports for each review; two final reports for rating and scores following the close of the review and two released reports for rating and scores following the release of the scores for the review.



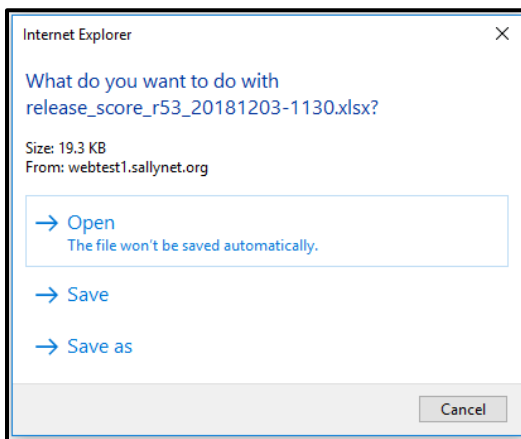
1. Click Reports>Ministry Unit

Ministry Unit Reports

Discovery Women's Centre

Final: Ratings	Final: Scores	Released: Ratings	Released: Scores
Compassion Resource Home Jan 23, 2019 close_rating_r77_20181203-1420.xlsx Download	Compassion Resource Home Jan 23, 2019 close_score_r77_20181203-1420.xlsx Download	Compassion Resource Home Nov 1, 2018 release_rating_r53_20181203-1130.xlsx Download	Compassion Resource Home Nov 1, 2018 release_score_r53_20181203-1130.xlsx Download
Discovery Women's Centre Dec 3, 2018 close_rating_r39_20181026-1022.xlsx Download	Discovery Women's Centre Dec 3, 2018 close_score_r39_20181026-1022.xlsx Download	Discovery Women's Centre Jan 22, 2019 close_rating_r75_20181206-0814.xlsx Download	Discovery Women's Centre Jan 22, 2019 close_score_r75_20181206-0815.xlsx Download

2. Search for the Ministry Unit
3. Click Download on desired report



4. Click to open, save or save as

Open: opens the report
Save: saves report to downloads
Save as: save the report to location of choice

Release Rating/Close Rating

The release rating and close rating shows the ratings and comments for each standard in each chapter evaluated in the review. There may be changes in the ratings from when the scores are released and when the review is closed. The final rating represents the final results in the review.

SOCIAL SERVICES ACCREDITATION SUMMARY REVIEW SHEET										
1 Governance & Management										
Reviewer Name: test_reviewer2										
Ministry Unit: Discovery Women's Centre										
Review Date: Jan 15, 2019-Jan 16, 2019										
	S	P	M	NC	NA	Comments and Action Required				
Community Awareness										
1.1.1	C	x								
1.1.2	H	x								
1.1.2	H	x								
1.1.2	H	x								
1.1.2	H	x								
Mission										
1.2.1	C			x						The mission statement requires updating
1.2.2	R			x						Mission statement will be posted for public viewing
Strategic Plan										
<div style="display: flex; align-items: center;"> ← → CH 1 CH 2 CH 3 CH 4 ← Chapters </div>										

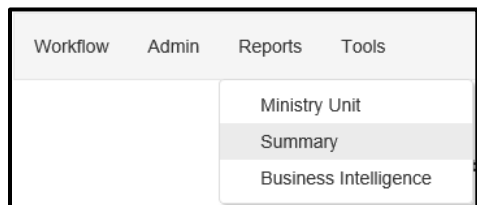
Release Score/Close Score

The release scores and close scores show the scores for each chapter evaluated in the review. There may be changes to ratings from the release of a review to the close of a review which may change the scores for the review. The final scores represent the final results in the review.

SOCIAL SERVICES						
ACCREDITATION REVIEW						
RATING REPORT						
Ministry Unit:	Discovery Women's Centre					
Division:	Newfoundland Division					
Team Leader:	Test TeamLeader1					
Review Date:	Feb 07, 2019-Feb 08, 2019					
Calculations Date:	Feb 15, 2019					
				Standards meeting full compliance		
Ch #	Chapter Title	Reviewed	Rating	High Risk	Critical	Regular
C-1	Governance & Management & kh	X	87.89	76.92	86.67	85.71
C-2	Employee Relations kh test	X	88.62	80.95	90.91	91.67
C-3	Facility	X	89.29	85.19	75.00	75.00
C-4	Spiritual & Religious Care	X	100.00	100.00	100.00	100.00
Overall Average						
			91.45%			

Summary

Summary reports offer review overviews. The default displays data from across the territory. However, the data can be filtered for specific divisions, specific ministry units, review cycles, and date ranges. The score threshold filters the data based on changing the required accreditation rating for success. The data is displayed using table format, pie charts, and bar charts.



1. Click Reports>Summary


Filter the data if desired to limit the data displayed. If no ministry unit within the division has had a review, that division will not be visible in the drop-down; likewise if there have been reviews within the division, but a ministry unit is not listed in the drop-down, that ministry unit has not had a review.

You can filter the data based on date ranges if desired. If you do not input an end date, it assumes the end date to be current date. You may use multiple filters to limit the data.



Click drop-down to filter by Divisions, Ministry Units and/or select the review cycles.

Divisions	Ministry Units	Review Cycles
All Divisions (Territory) ▾	All Ministry Units ▾	<input checked="" type="checkbox"/> 1 <input type="checkbox"/> 2

Type desired dates or click on the calendar icon to select desired start and end dates for filter.

Start	End
mm/dd/yyyy 	mm/dd/yyyy

Drag the slider on threshold to view results if success criteria were changed.

Score Threshold 80% 	Score Threshold 74% 
--	--

Business Intelligence Reports

Business Intelligence reports provide a means for analytical data and comparison. The reports may be customized by selecting from a list of available fields to make them active fields and display on the report.

Workflow	Admin	Reports	Tools
		Ministry Unit	
		Summary	
		Business Intelligence	

1. Click Reports>Business Intelligence

To elect what is appearing on the reports, choose the available fields and drag them to selected fields

Table	Count
DivisionName ▾	MinistryUnitName ▾
CountOfReviewCycles ▾	ReviewStartDate ▾
ReviewEndDate ▾	ChapterName ▾
ChapterNo ▾	ChapterScore ▾
ReviewChapterNo ▾	SectionName ▾
IsConditionalPassChapter ▾	SectionScore ▾
ChapterAssignedTo ▾	StandardNo ▾
StandardLastModifiedBy ▾	StandardScore ▾
ReviewId ▾	
SectionNo ▾	
StandardRateId ▾	
StandardRateType ▾	
StandardRiskId ▾	
StandardRiskType ▾	

Selected fields

Available fields

Click the field in available fields and with the mouse still suppressed, drag the available field to the selected fields. Selected fields appear on the report

Example report based on the selected criteria above

Selected fields are the labels for the report.

MinistryUnitName	ReviewStartDate	ChapterName	ChapterScore	SectionName	SectionScore	StandardNo	StandardScore	Totals
Discovery Women's Centre	Jun 19, 2018	Community & Family Services	77	Client Documentation	100	7.7.1	2	2
						7.7.3	3	1
				Group Programs	100	7.8.1	2	1
						7.8.2	1	1
				Improving Programs and Practices	100	7.9.1	2	2
						7.9.3	3	1
				Intake & Registration	96.6	7.5.1	2	2
						7.5.3	3	1
						7.5.4	1	2
				Material Assistance	88.67	7.6.1	2	1
	7.6.2	0.66	1					

Both the available fields and the selected fields may be filtered to limit the data displayed by using the drop-down.

Business Intelligence Reporting

Table ▼
Count ▼

- CountOfReviewCycles ▼
- ReviewEndDate ▼
- ChapterNo ▼
- ReviewChapterNo ▼
- IsConditionalPassChapter ▼
- ChapterAssignedTo ▼
- StandardLastModifiedBy ▼
- ReviewId ▼
- SectionNo ▼
- StandardRateId ▼
- StandardRateType ▼
- StandardRiskId ▼
- StandardRiskType ▼

- DivisionName ▼
- MinistryUnitName ▼
- ReviewStartDate ▼
- ChapterName ▼
- ChapterScore ▼
- SectionName ▼
- SectionScore ▼
- StandardNo ▼
- StandardScore ▼

Default filter (all selected)

DivisionName (5)

- Alberta Division (412)
- British Columbia Division (862)
- Ontario Central-East Division (829)
- Ontario Great Lakes Division (1604)
- Quebec Division (195)

Apply
Cancel

Filtered for one division only (OCE)

DivisionName (5)

- Alberta Division (412)
- British Columbia Division (862)
- Ontario Central-East Division (829)
- Ontario Great Lakes Division (1604)
- Quebec Division (195)

Apply

Click apply to engage filter

The data columns may be changed by dragging the available fields to the top of the report across from the functions.

Business Intelligence Reporting

Table Selected field

CountOfReviewCycles

The data display is modified based on columns and rows from above filtering.

Example of column filtering based on Division Name

DivisionName								DivisionName	Alberta Division	British Columbia Division	Ontario Central-East Division	Ontario Great Lakes Division	Quebec Division	Totals
MinistryUnitName	ReviewStartDate	ChapterName	ChapterScore	SectionName	SectionScore	StandardNo	StandardScore							
Discovery Women's Centre	Jun 19, 2018	Community & Family Services	97.77	Client Documentation	100	7.7.1	2				2			2
						7.7.3	3			1		1		
				Group Programs	100	7.8.1	2			1		1		
						7.8.2	1			1		1		
				Improving Programs and Practices	100	7.9.1	2			2		2		
						7.9.3	3			1		1		
				Intake & Registration	96.6	7.5.1	2			2		2		
						7.5.3	3			1		1		
						7.5.4	1			2		2		
						7.5.5	0.66			1		1		

Example of column filtering based on Division Name and Ministry Unit Name

DivisionName		MinistryUnitName						DivisionName	Ontario Central-East Division			Totals
ReviewStartDate	ChapterName	ChapterScore	SectionName	SectionScore	StandardNo	StandardScore	MinistryUnitName	Discovery Women's Centre	Golden Years Home	Rest Awhile Shelter		
Aug 13, 2018	BPSS	92.63	Intake	94.77	12.5.1	1.32				1		1
					12.5.2	2			1		1	
					12.5.3	3			2		2	
					12.5.5	1			3		3	
					12.1.1	2			3		3	
			Program Plan	100	12.1.3	1			4		4	
			Assessment	100	12.6.1	2			1		1	
			Case Work	100	12.7.1	2			3		3	
					12.7.2	0			1		1	

The drop-down at the top of the report selection criteria are Excel based functions and behave in standard excel format.

Business Intelligence Reporting

Table Report criteria

Print Reports

You can print the reports that you generate. Ministry Unit reports are generated in Microsoft Excel so you can print these as in any Excel spreadsheet. When you click the print icon for Summary or Business Intelligence reports, a screen capture of what you have filtered if anything is printed.

Click Print icon to generate the screen capture of the information displayed on screen.

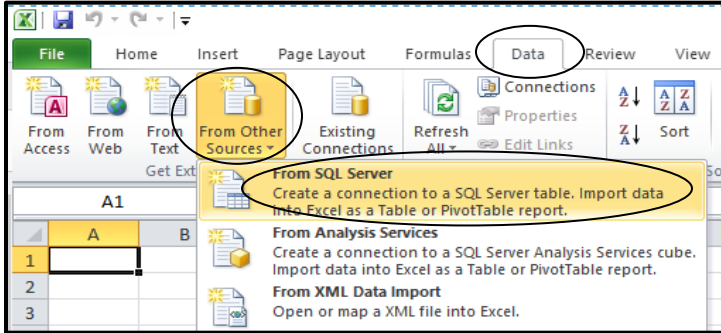


Create Live Reports

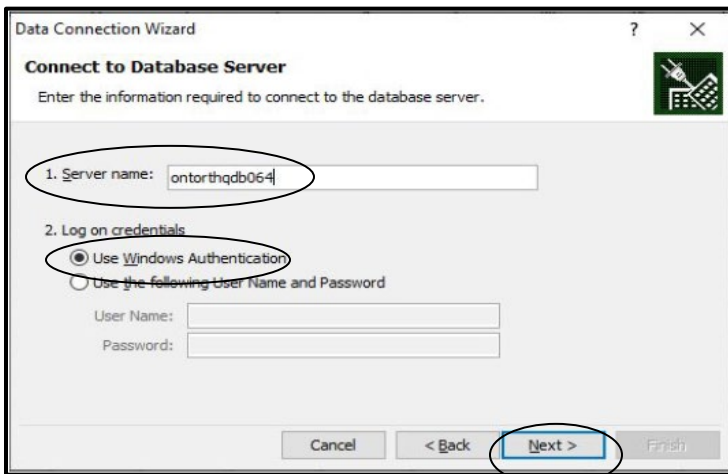
ARMS reports may be generated by connecting to a SQL data source. The benefit of this type of report is the data is pulled from the application source and it is always the most up-to-date information. The report is created using Microsoft Excel; therefore the data output can be treated and data in any excel spreadsheet and provides all functions available in Excel.

CONNECT TO A SQL DATA SOURCE

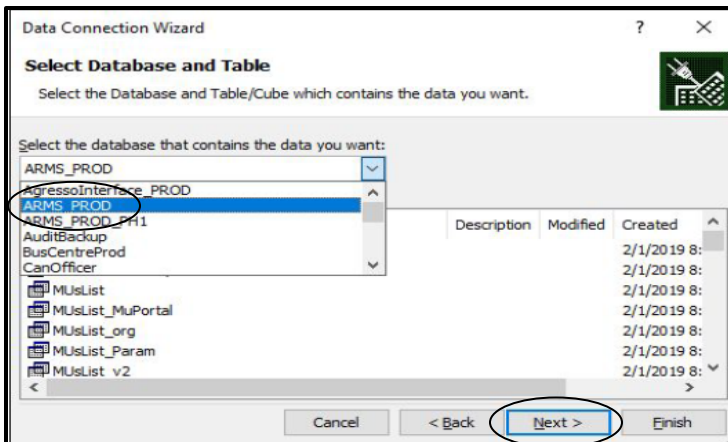
1. Open Excel
2. Click Data>From Other Sources>From SQL Server



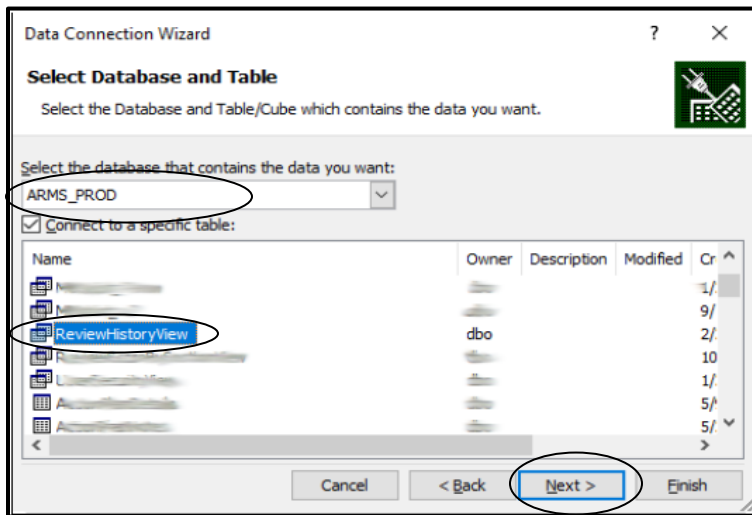
3. Enter the Server name onorthqdb064
4. Confirm Use Windows Authentication is selected
5. Click Next



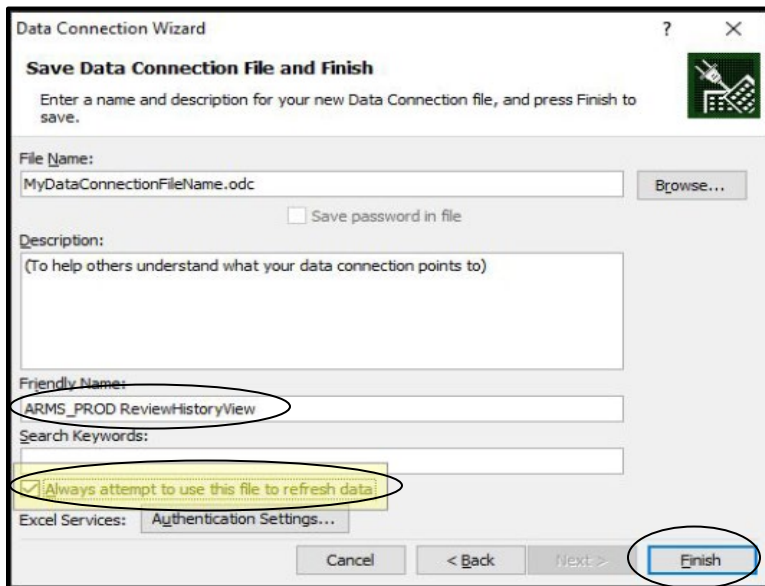
6. Select database ARMS_PROD
7. Click Next



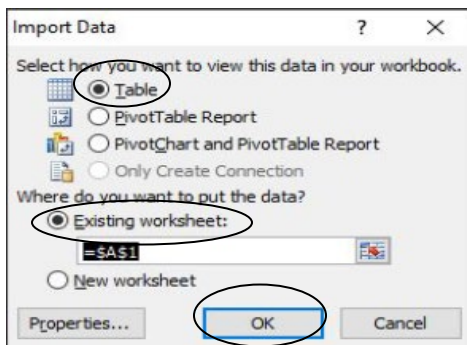
8. Confirm Connect to a specific table is checked
9. Click ReviewHistoryView
10. Click Next



11. Give the data connection a file name
12. Ensure Always attempt to use this file to refresh data is checked
13. Click Finish



14. Ensure Table is selected
15. Ensure Existing worksheet is selected
16. Click OK

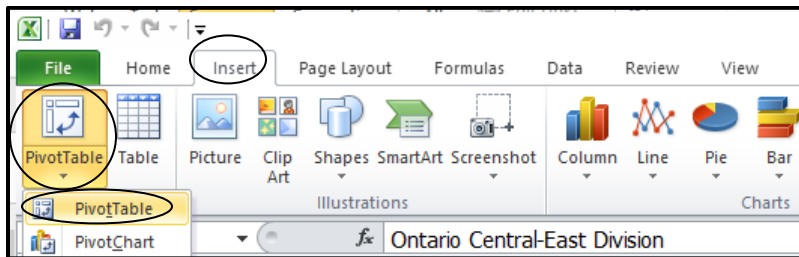


The data table will be displayed

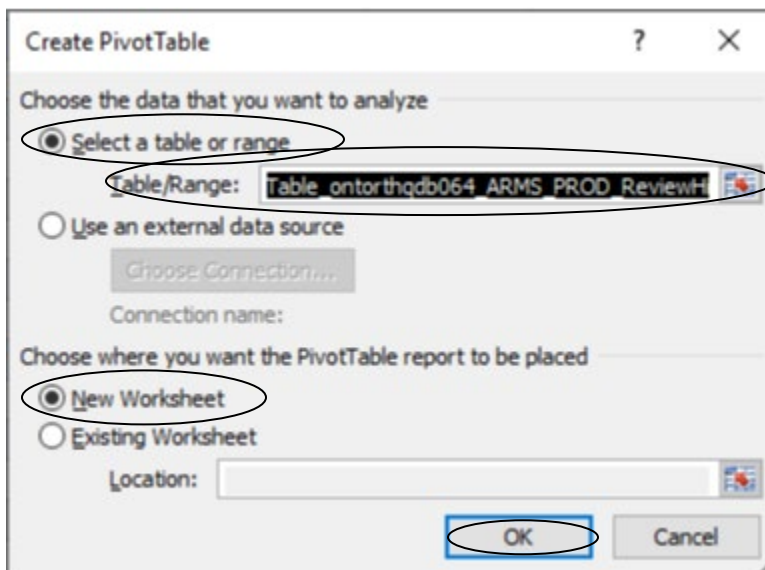
DivisionId	DivisionName	MUNO	MinistryInitName	ReviewId	CountOfReviewCycles	ReviewStart
2	British Columbia Division	134	Cascade CC	16	1	2018-01
3	British Columbia Division	134	Cascade CC	16	1	2018-01
4	British Columbia Division	134	Cascade CC	16	1	2018-01
5	British Columbia Division	134	Cascade CC	16	1	2018-01
6	British Columbia Division	134	Cascade CC	16	1	2018-01
7	British Columbia Division	134	Cascade CC	16	1	2018-01
8	British Columbia Division	134	Cascade CC	16	1	2018-01
9	British Columbia Division	134	Cascade CC	16	1	2018-01
10	British Columbia Division	134	Cascade CC	16	1	2018-01
11	British Columbia Division	134	Cascade CC	16	1	2018-01
12	British Columbia Division	134	Cascade CC	16	1	2018-01
13	British Columbia Division	134	Cascade CC	16	1	2018-01
14	British Columbia Division	134	Cascade CC	16	1	2018-01
15	British Columbia Division	134	Cascade CC	16	1	2018-01
16	British Columbia Division	134	Cascade CC	16	1	2018-01
17	British Columbia Division	134	Cascade CC	16	1	2018-01
18	British Columbia Division	134	Cascade CC	16	1	2018-01
19	British Columbia Division	134	Cascade CC	16	1	2018-01

INSERT A PIVOT TABLE

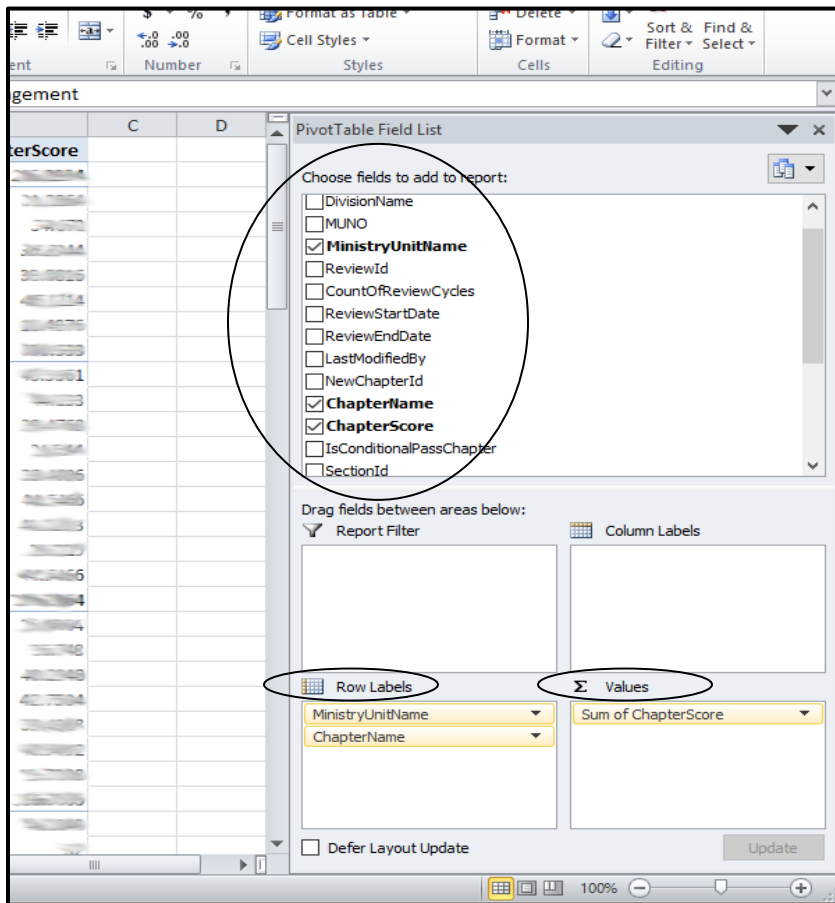
1. Open the data source in Excel
2. Click Insert>PivotTable>PivotTable



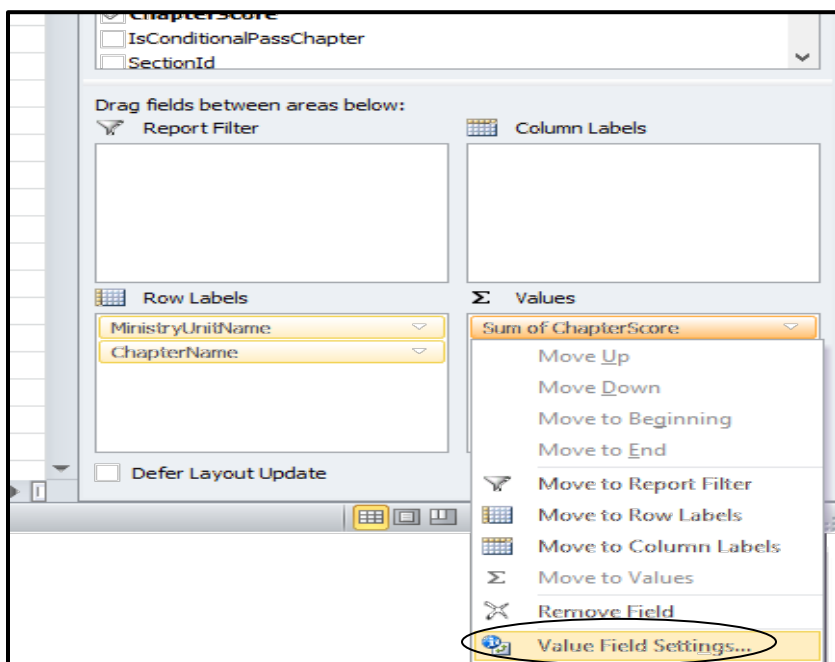
3. Ensure Select a table or range is selected
4. Select the desired data from the worksheet
5. Ensure New worksheet is selected
6. Click OK



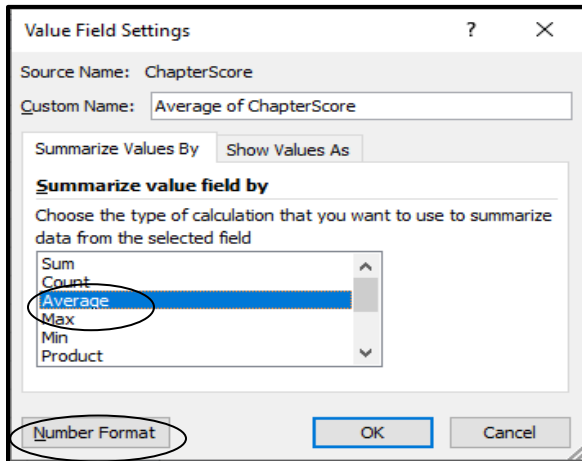
7. Click to check pivot table field List
8. Click to drag the Row Labels to Values
9. Click drop-down arrow on Values



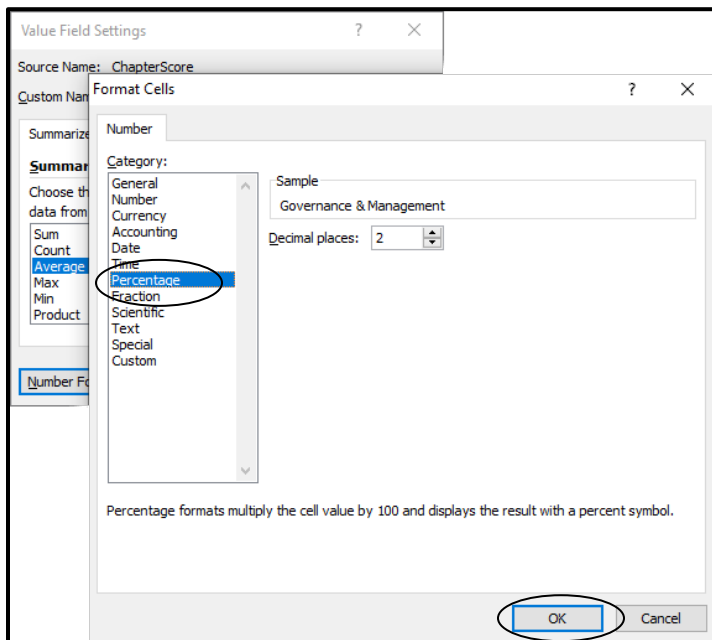
10. Select Value Field Settings....



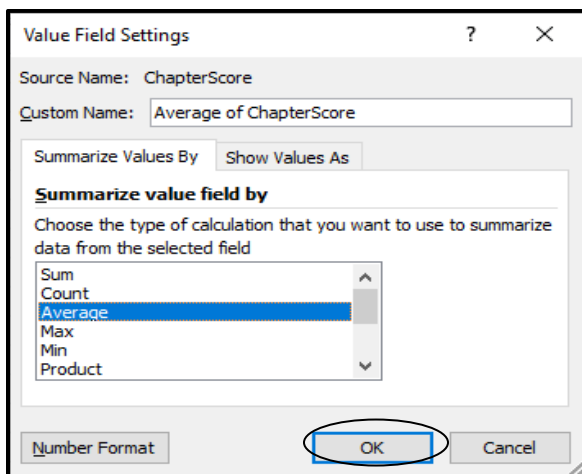
11. Select the desired Summarize value field by
12. Click Number Format



13. Select the desired number format
14. Click OK



15. Click OK




Data is displayed as selected for the pivot table

Row Labels	Average of ChapterScore
Centerpoint CFS	91.69%
Community & Family Services	97.77%
Facility	86.68%
Governance & Management	89.84%
Human Resources	90.64%
Sheltering Services	98.09%
Spiritual & Religious Care	84.08%
Discovery Women's Centre	91.76%
BPSS	92.63%
Day Program	93.90%
Employee Relations	89.72%
Facility	86.36%
Governance & Management	93.66%
PLUS	94.78%
Residential	87.49%
Spiritual & Religious Care	91.95%
TEP	94.78%
Lifebridge Community Church	90.25%
Community & Family Services	82.77%
Facility	91.87%
Governance & Management	98.28%
Human Resources	97.16%
Residential Services	82.16%
Sheltering Services	89.02%
Spiritual & Religious Care	89.64%
Rest Awile Shelter	97.21%
Addiction Services	94.48%
Community & Family Services	100.00%

Calendar

The calendar provides an easy way to view scheduled reviews. You cannot modify calendar entries in this view. You will only be able to see the reviews assigned to you in the calendar view.


 Giving
Hope
Today

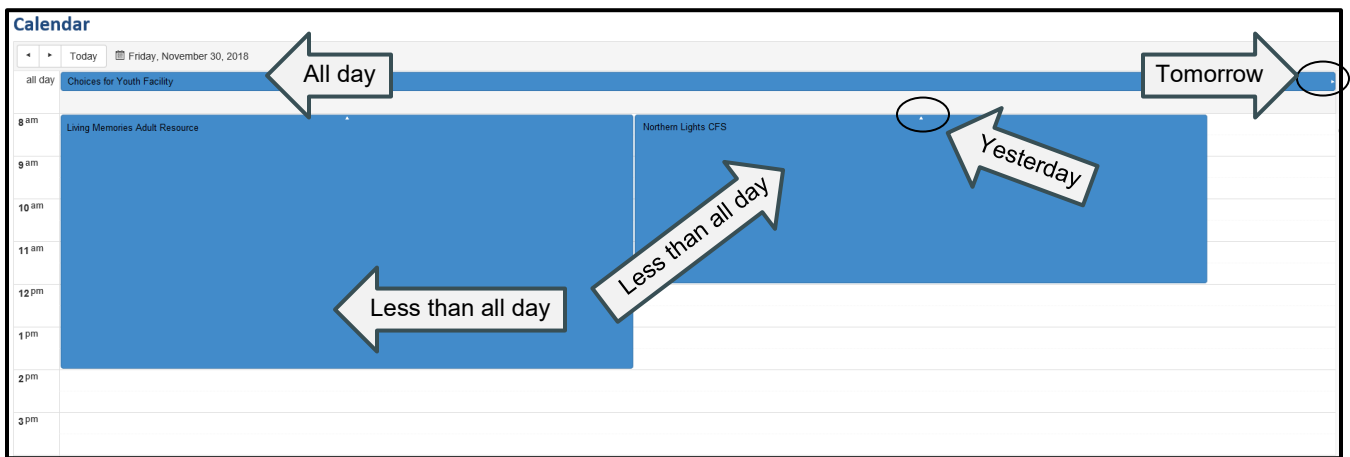
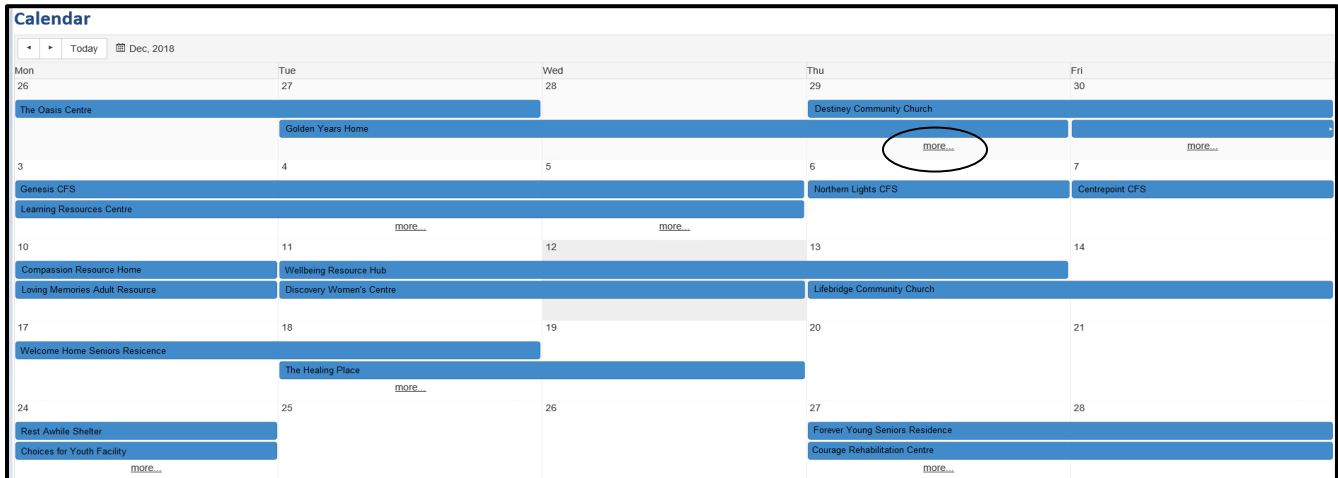
ARMS Version 1.0 (TEST PH2)
Welcome Test Teamleader

[Workflow](#)
[Admin](#)
[Reports](#)
[Tools](#)
[Sign Out](#)

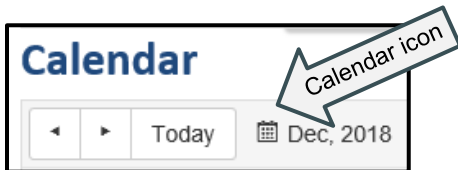
Click Tools>Calendar

[Calendar](#)

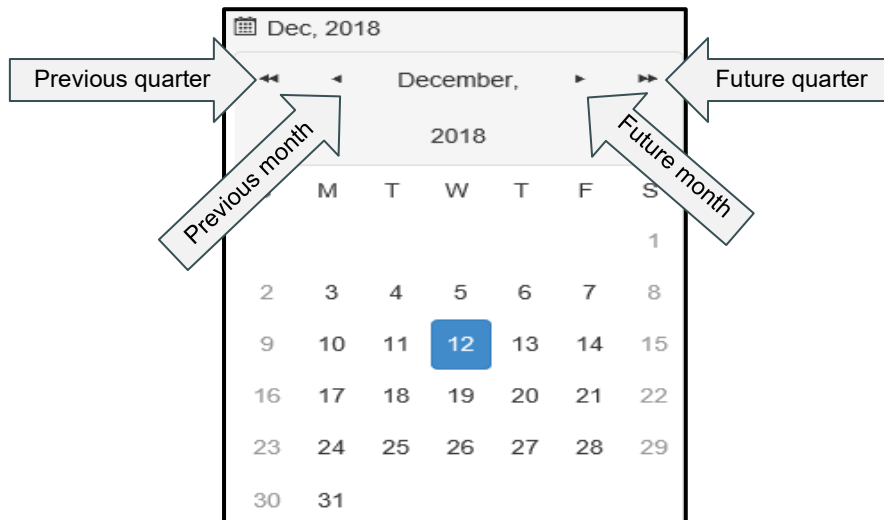
Click more to get a timeframe view

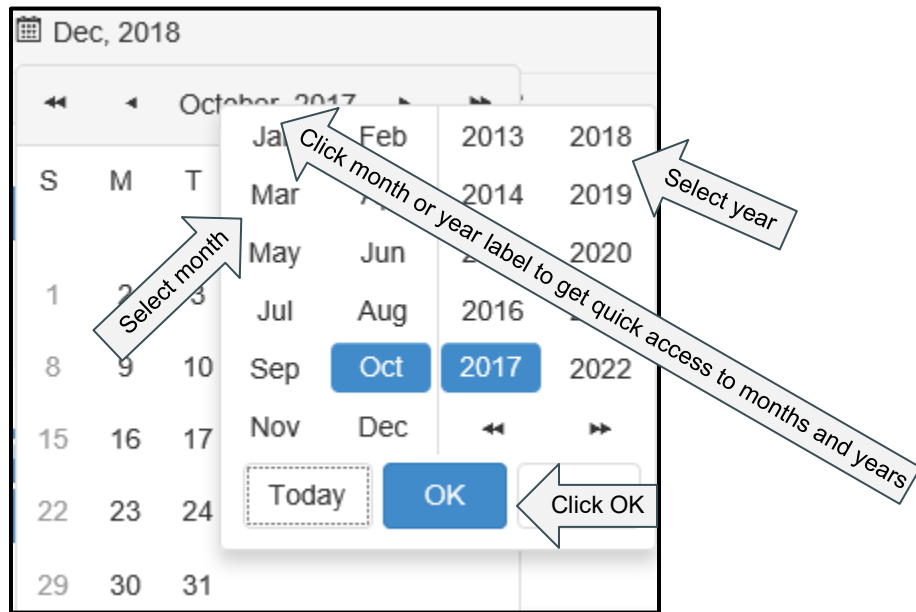


Calendar Controls



Click calendar icon → Calendar displays

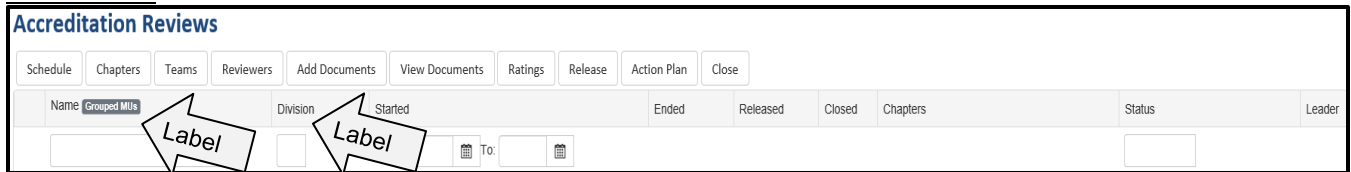




Sort

Sorting means you can change the order in which items are displayed. Labels are used as sorting fields. Typically you can sort alphabetically and numerically. You can click the label name to sort. You can only sort on one field at a time. In ARMS you can sort on many different screens.

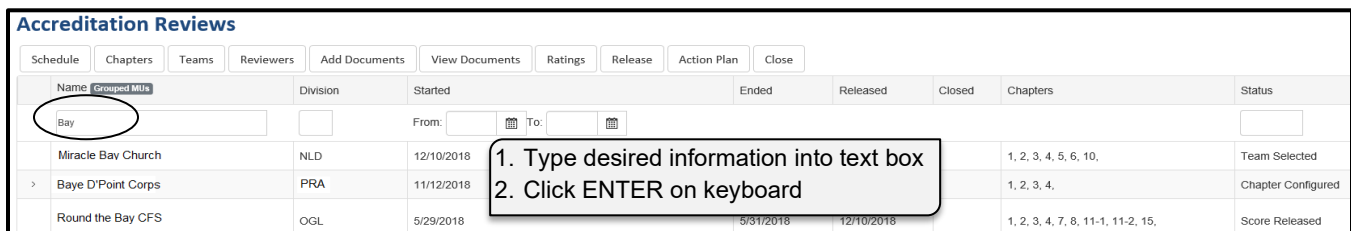
Reviews List



Filters

Filters are used to make it easier to find information. When you filter information, you search text that fit a certain criteria. In ARMS you can filter on many different screens. Any screen where you see a text box below the label or there is a drop-down, you can filter on that field. You can filter on more than one field at a time.

Text Box Filters



Example of part of word for search

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close

Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
			From: <input type="text"/> To: <input type="text"/>						Test
Miracle Bay Church		NLD	12/10/2018	12/10/2018			1, 2, 3, 4, 5, 6, 10,	Team Selected	Test_reviewer
> Baye D'Point Corps		PRA	11/12/2018	11/13/2018			1, 2, 3, 4,	Reviewer Assigned	
Round the Bay CFS		OGL	5/29/2018	5/31/2018	12/10/2018		1, 2, 3, 4, 7, 8, 11-1, 11-2, 15,	Chapter Configured	Test_Teamleader1

Example of entire word for search

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close

Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status	Leader
Miracle Bay Church			From: <input type="text"/> To: <input type="text"/>						
Miracle Bay Church		NLD	12/10/2018	12/10/2018			1, 2, 3, 4, 5, 6, 10,	Team Selected	Test_reviewer

As well you can use more than one filter at a time.

Example of using more than one filter

Accreditation Reviews

Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release Action Plan Close

Name	Grouped MUs	Division	Started	Ended	Released	Closed	Chapters	Status
Bay			From: <input type="text"/> To: <input type="text"/>					Team
Miracle Bay Church		NLD	12/10/2018	12/10/2018			1, 2, 3, 4, 5, 6, 10,	Team Selected
> Baye D'Point Corps		PRA	11/12/2018	11/13/2018			1, 2, 3, 4,	Team Selected
Round the Bay CFS		OGL	5/29/2018	5/31/2018	12/10/2018		1, 2, 3, 4, 7, 8, 11-1, 11-2, 15,	Team Selected

Remove Filter

To remove the filter, you can highlight the contents of the filter, and press Delete on the keyboard or you can click the x in the filter field. Then press Enter on keyboard.

Accreditation Reviews

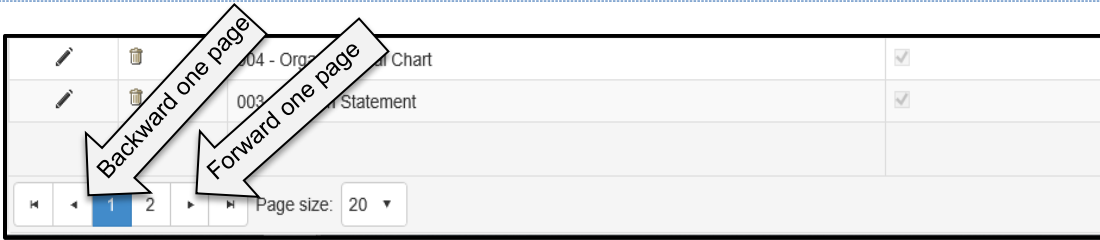
Schedule Chapters Teams Reviewers Add Documents View Documents Ratings Release

Name	Grouped MUs	Division	Started
Bay			From: <input type="text"/> To: <input type="text"/>
Miracle Bay Church		NLD	12/10/2018
> Baye D'Point Corps		PRA	11/12/2018

Page Controls

At the bottom of the documents maintenance page you will see page controls for displayed page.

Move through Individual pages



Go To Desired Page

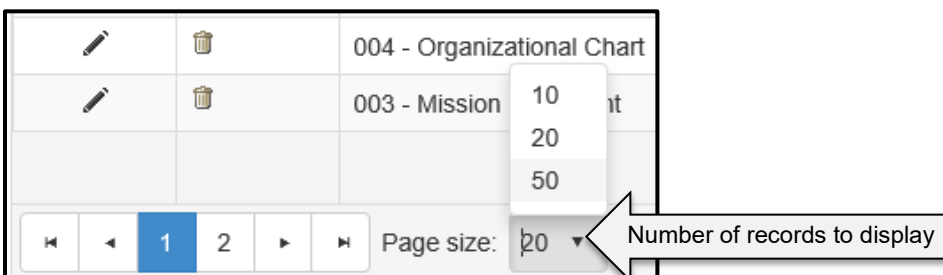


Go to First or Last Page



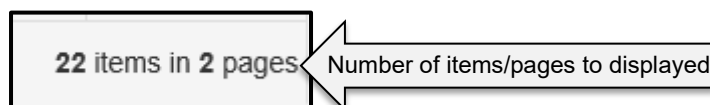
Page Size

You can change the number of records that display on a single page. Click drop-down arrow to select the number of records to display on the page.



Items and Pages Displayed

On the far bottom right of the display page you will see the number of items displayed on the page as well as the number of pages available.



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