



Tips for the TruServe “Site Administrator”

Role of the TruServe “Site Administrator”

- Serve as the TruServe point of contact for your organization:
 - Facilitate revisions to your TruServe site as needed
 - Notify TruServe when there are additional staff to add, or inactive staff to remove
 - Contact TruServe with user concerns or technical issues
 - Inform TruServe of additional features/functionality that could serve your organization better
- Point staff to TruServe resources when needed (e.g., recorded webinars, tutorials, manual, etc.)
- Assist staff with entering data consistently
- Promote regular use of TruServe in your office
- Encourage your organization’s new users to join a monthly TruServe training webinar
- Work with staff to ensure that measures being tracked are current and relevant with reporting requirements

Tips for encouraging staff to enter activities into TruServe

- Ensure that staff users are able to capture their program information with the measures provided in TruServe
- Assist in setting up templates for recurring activities, used by some or all staff members
- Provide hovers – brief definitions for labels within a field that aid with data entry consistency
- Provide program data entry forms for those who prefer working with hard copies (see samples of program data entry forms under “Manuals & Tip Sheets” on your TruServe home screen)
- Help staff in setting up report templates for recurring reports and individual reports to monitor individual activities
- Post your state’s resources under the “Site Resources” on the home screen of your site; e.g. data dictionaries, specific program data entry/reporting protocols, etc.

“Site Administrator” Frequently Asked Questions

- **How is our organization’s data kept secure and confidential?** A 256 bit SSL Certificate is used for each site which encrypts and secures data transactions. This is the same level of encryption used for most online banking.
- **What parts of TruServe can be customized to our organization?** Each organization can choose specific measures to track, and can customize field and label names within TruServe.
- **How can I access technical support?** TruServe support is available Monday through Friday from 8am – 4:30pm CST. Contact kelly.quigley@med.und.edu or 701-777-2094 for assistance.
- **If an inactive staff member is removed from the staff listing, will we still be able to report on their activities?** Yes, you can continue to select that user from the reporting options.

Tips for Supervisors

Ways to maximize the benefits of TruServe

- Identify your organization's "Site Administrator"
- Require each new staff user to join a TruServe monthly training webinar
- Schedule a periodic review of your organization's TruServe site to:
 - Ensure that measures tracked are current and relevant for each program
 - Ensure that staff can track their work with the existing measures
 - Ensure you are able to create the reports you need using TruServe
- Hold a staff discussion on what your organization needs to track using TruServe and how your organization will be using that information (e.g., reporting, staff meeting updates, performance reviews, etc.)
- Ask for help with creating reports if needed
 - TruServe staff can provide examples of reports, and assistance with creating reports that accurately capture the work of your organization
- Let us know how we can serve your organization better

Ideas to encourage TruServe usage within your organization:

- Post your state's resources under "site resources" on the home screen of your site; e.g. data dictionaries, specific program data entry/reporting protocols, etc. for references specific to your organization
- Use TruServe to create reports that help staff visualize the good work they do
- Promote TruServe training webinars among staff
- Add TruServe as an agenda item at staff meetings
- Share year-end reports with staff and show how data entry contributes to the reports created
- Use TruServe to coordinate internal communication

Tips for All Users

- Use templates for adding recurring activities
- Copy email communications right into the description of the activity for quick data entry
- Create a recurring reminder to enter in TruServe activities
- Create a report template on your own activities to track your efforts toward specific programs/goals. Run the report monthly, quarterly, etc.
- Use the search feature to locate specific records
- Use the Organization record to see recent activity others have had with that particular organization/person
- Create groups of organizations for the groups you work with frequently. For example, if you have a listserv that includes all Critical Access Hospitals, create a “Critical Access Hospitals” group. You will then be able to add the group of organizations to an activity record, rather than adding each organization separately.
- Use the email activity feature for internal communication about activity and organization records
- Access resources directly from your site’s home screen
 - Find contact information for technical assistance
 - See the video tutorial listing for quick references on how to use the features of TruServe
 - Consult “site resources” for your organization’s guides to using TruServe, data dictionary’s, and program protocols
- Are there any ways TruServe could help you better track/report on your work? Contact your organization’s TruServe “Super User” or kelly.quigley@med.und.edu to discuss how TruServe could better meet your needs.
- Join a monthly TruServe training webinar for a refresher, or to ask specific questions any time

Questions

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