Administrator Functions in EvaluationWeb®
User Guide
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Getting Help

Contact Information
For login and password issues, contact the SAMS Help Desk at:
- samshelp@cdc.gov
- 877.681.2901

For new EvaluationWeb accounts, contact Lourdes Gordillo at CDC:
- Lourdes Gordillo
- hkq7@cdc.gov
- 404.639.1937

For technical assistance with EvaluationWeb (other than new accounts and login and password issues), contact the Luther Consulting Help Desk:
- help@lutherconsulting.com
- 866.517.6570 - option 1 (toll-free)

Training resources
Click the blue question mark in the upper right corner of most EvaluationWeb pages to go the EvaluationWeb Help Page. There you will find training guides and videos on numerous aspects of the EvaluationWeb system.
Managing Agency Information

Selecting an Agency to Manage

Perform the following steps to select an existing agency to manage.

1. Click **Manage Agencies** in the EvaluationWeb landing page.

   ![Manage Agencies](image)

   **Result:** The Sponsoring Agency window opens.

2. (Optional) Filter the Sponsoring Agency window to limit the number of agencies listed.

<table>
<thead>
<tr>
<th>If you want to...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find a specific agency name</td>
<td>Type any portion of an agency name in the Sponsoring Agency search box.</td>
</tr>
</tbody>
</table>

   ![Sponsoring Agency](image)

   **Continued...**
If you want to... | Then...
---|---
Find agencies having a specific status | Click the Sponsoring Agency dropdown arrow, and then select a status from the dropdown list.

3. Click the name of an agency to select it.

**Editing Agency Information**

Perform the following steps to make changes to an existing agency.

1. Select an agency name, and then click **Edit Agency** in the Sponsoring Agency window.
**Result:** An information window for the selected agency opens.

2. Type to add or modify the name in the **Agency Name** box.

3. Type an ID in the **Local ID** box.

   **Note**
   
   EvaluationWeb displays your agency’s Local ID in the Agency Name box until you replace it with the actual name of your agency.

4. Click the **Directly Funded** arrow, and then select **Yes** or **No** from the dropdown list.

   **Note**
   
   To modify a Local ID for an existing agency, contact the Luther Consulting Help Desk for assistance.
**Result:** Clicking **Yes** opens two additional boxes: CBO Agency Name and CBO Agency ID.

5. Is the agency a CBO receiving direct funds from the CDC?

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
</table>
| Yes   | i. Type a name in the CBO Agency Name box.  
      | ii. Type an ID in the CBO Agency ID box.  
      | iii. Go to Step 8.  
      | **Note:** Agency IDs are assigned to directly funded community-based organizations (CBOs) by CDC. The ID must be two letters followed by three numbers. |
| No    | Go to Step 6. |

6. Is the agency a CBO that will use extra variables?

<table>
<thead>
<tr>
<th>If...</th>
<th>Then...</th>
</tr>
</thead>
</table>
| Yes   | i. Click the **Use Extra Variables** dropdown arrow, and then click **Yes** or **No** from the list.  
      | ii. Go to Step 7. |
| No    | Go to Step 7. |
7. Type or select information for each value in the Agency Demographics section.

8. Type information for each value in the Agency Contact section.

9. Click **Update Sponsoring Agency**.

**Result**: The changes are saved and a Data Submitted dialog box opens.

10. Click **OK** in the dialog box to close it.
Adding an Agency

Perform the following steps to add a new agency to your department’s EvaluationWeb setup.

1. Click the **Manage Agencies** button on the EvaluationWeb landing page.

**Result:** The Sponsoring Agency window displays, which lists active agencies associated with your department.
2. Click the plus sign icon below the list of agencies.

Result: The New Sponsoring Agency window opens.
3. Type information or make selections for the items in the New Sponsoring Agency window.

![New Sponsoring Agency Window](image)

4. Click the **Update Sponsoring Agency** button at the bottom of the window.

   **Result:** A data submitted dialog box opens.

   ![Data Submitted Dialog Box](image)

5. Click **OK** in the dialog box.

   **Result:** The dialog box closes, and the agency you added displays in the sponsoring Agency window.

![Sponsoring Agency Window](image)
Making an Agency Inactive

Perform the following steps to make an agency inactive.

**Note**

When you make an agency inactive, data-entry staff can no longer access the agency. However, the data that has been entered for that agency will continue to be available when running reports.

1. **Select the agency** you want to make inactive in the Sponsoring Agency window.

2. Click the **Make Sponsoring Agency Inactive** icon at the bottom of the Sponsoring Agency section of the window.

**Result:** A Make Inactive dialog box opens.

3. Click **Yes** in the dialog box.

**Result:** The dialog box closes and the agency is removed from the list of active agencies.
Making an Inactive Agency Active

Perform the following steps to make an inactive agency active.

1. Click the **Sponsoring Agency** dropdown arrow, and then select **Inactive** from the list.

   ![Sponsoring Agency dropdown]

   **Result:** The Sponsoring Agency window displays inactive agencies only.

   ![Sponsoring Agency window showing inactive agencies]

   **Note**
   The inactive icon next to an agency name indicates the agency is currently in inactive status.

2. Click the agency you want to make active.
3. Click **Make Agency Active** at the bottom of the Sponsoring Agency section of the window.

   ![Make Agency Active](image)

   **Result:** The agency becomes active and is removed from the list of inactive agencies.

---

### Deleting an agency

Perform the following steps to delete an agency.

1. **Select the agency** you want to delete in the Sponsoring Agency window.

2. Click the **Delete Sponsoring Agency** icon at the bottom of the Sponsoring Agency section.

   ![Delete Sponsoring Agency](image)

   **Result:** A Delete Agency dialog box opens.

---

**Note**

When you delete an agency, staff can no longer select that agency when entering data. However, the data already entered for the agency will continue to be available when running reports.
3. Click **Yes** in the dialog box.

   **Result:** The dialog box closes and the agency is removed from the list of active agencies.

---

**Undeleting an Agency**

Perform the following steps to undelete a deleted agency.

1. Click the **Sponsoring Agency** dropdown arrow, and then select **Deleted** from the list.

   **Result:** The Sponsoring Agency window displays deleted agencies only.

2. Click the agency you want to undelete, and then click **Undelete Sponsoring Agency**.

   **Result:** The agency is removed from the list of deleted agencies and an Agency Restored dialog box opens.

3. Click the **OK** button to close the dialog box.
4. Click the **Sponsoring Agency** arrow, and then click **All** or **Active** in the dropdown list to view the agency you undeleted.
Managing Site Information

Adding a Site

Perform the following steps to add a site to your department’s EvaluationWeb setup.

1. Click the **Manage Agencies** button on the EvaluationWeb landing page.

   **Result:** The Sponsoring Agency window opens, which lists active agencies associated with your department.
2. Click an agency in the Sponsoring Agency window.

   **Result:** The Sponsoring Agency window displays the Sites section for the selected Sponsoring Agency.

![Sponsoring Agency Window](image1)

3. Click the “plus” icon at the bottom of the Sites section.

   **Result:** The New Site window opens.

![New Site Window](image2)
4. Type or select values for the boxes in the New Site window.

![New Site Window]

5. Click the **Update Site** button.

   **Result**: A Data Submitted dialog box opens.

![Data Submitted Dialog Box]

6. Click **OK** in the dialog box.

   **Result**: The Data Submitted dialog box closes and the new site is saved.

   **Music Note**

   After adding a site, you must add it to a Program before users can enter data for that program at that site. For instructions, see [Linking Sites and Users to a Program](#).
Editing Site Information

Perform the following steps to edit information for a site that is already in EvaluationWeb.

1. Click **Manage Agencies** in the EvaluationWeb landing page.

   ![Manage Agencies](image)

   **Result:** The Sponsoring Agency window opens.

2. Click an agency name in the Sponsoring Agency window.

   ![Sponsoring Agency](image)

   **Result:** The Sites section opens below the Sponsoring Agency section.
3. Click the site you want to edit in the Sites section.

4. Click the **Edit Site** button.

   **Result:** The Site Information window for the selected site opens.

5. Edit the information in the boxes of the Site Information section as needed.

   **Note:** Some agencies may refer to “Local ID” as “Site ID.”
6. Click the **Update Site** button.

![Site Information](image)

**Result:** The site information is saved and a Data Submitted dialog box opens.

![Data Submitted](image)

7. Click **OK** in the dialog box to close it.

### Making a Site Inactive

Perform the following steps to make a site inactive.

**Note**

When you make a site inactive, staff can no longer access the site. However, data already entered for that site will continue to be available when running reports in EvaluationWeb.

1. **Select an agency** in the Sponsoring Agency window.
2. Click the site you want to make inactive in the Sites section of the window.

3. Click the **Make Site Inactive** icon at the bottom of the Sites section.

**Result**: A Make Inactive dialog box opens.

4. Click **Yes** in the dialog box.

**Result**: The dialog box closes and the site becomes inactive.

**Note**: Click the **Sites** dropdown arrow and then click **Inactive** from the list in the Sites section of the window to view an inactive site.
Making a Site Active

Perform the following steps to make an inactive site active.

1. Click an agency name in the Sponsoring Agency window.
2. Click the **Sites** dropdown arrow, and then select **Inactive** from the list.

![Screenshot of Sites dropdown with Inactive selected](image)

**Result**: The Sites section of the window displays inactive sites only.

![Inactive site selection](image)

3. Click the site you want to make active.

4. Click **Make Site Active** at the bottom of the Sites section.

**Result**: The site becomes active and is removed from the list of inactive sites.
Deleting a Site

Perform the following steps to delete a site.

1. **Select an agency** in the Sponsoring Agency section of the window.
2. Click the site you want to delete in the Sites section of the window.
3. Click the **Delete Site** icon at the bottom of the Sites section of the window.

   ![Sites for Regnstrif Agency](image)

   **Result:** A Delete Site dialog box opens.

   ![Delete Site - Regnstrif Agency - 23456 - Regnstrif Day Center](image)

   **Result:** The dialog box closes and the site is deleted.

   4. Click **Yes** in the dialog box.
Undeleting a Site

Perform the following steps to undelete a deleted site.

1. Select an agency in the Sponsoring Agency section of the window.
2. Click the Sites dropdown arrow, and then select Deleted from the list.

Result: The Sites section displays deleted sites only.
3. Select the site you want to undelete and then click **Undelete Site**.

![Sites for AL Combined Agency](image)

**Result:** The site is removed from the list of deleted sites and a Site Restored dialog box opens.

![Site Restored](image)

4. Click **OK** in the dialog box to close it.

**Notes**

- To view the undeleted site, click the **Sites** dropdown arrow, and then select **All** or **Active** from the list.
- If you undelete a site that was both Inactive and Deleted, you must make the undeleted site Active before it will appear in the list of active sites.
Managing Program Information

Adding a Program

Once you have added an agency to your department’s setup in EvaluationWeb, you can add programs to the agency.

Perform the following steps to add a program to an existing agency.

1. Click **Manage Agencies** in the EvaluationWeb landing page.

Result: EvaluationWeb displays the Sponsoring Agency window, which lists your department’s existing agencies.
2. Double-click an agency name.

Result: EvaluationWeb displays the Programs window for the selected agency.

3. Click the plus sign icon below the Programs box.
**Result:** The New Program window opens.

4. Type or select information for the items in the New Program window.  
   **Note:** You can select more than one Program Announcement check box.  
5. Click the **Add Program** button.

**Result:** A Data Submitted dialog box opens.
6. Click **OK** in the dialog box.

**Result:** The dialog box closes. EvaluationWeb displays the new program in the Programs window.

**Note:** To return to the Sponsoring Agency window, click the “back to agency” arrow at the top of the window.
Linking Sites and Users to a Program

Before a user can add data to a program in EvaluationWeb, you must link sites and users to the program.

Perform the following steps to link sites and users to a program.

1. Click **Manage Agencies** in the EvaluationWeb landing page.

   ![Manage Agencies Menu](image1)

   **Result:** The Sponsoring Agency window opens.

   ![Sponsoring Agency Window](image2)
2. Double-click an agency name in the Sponsoring Agency window.

**Result:** The Programs window opens for the agency you selected.

![Programs for Regenstrief Agency](image)

3. Click a program name in the list of programs.

**Result:** The page displays Sites and Users boxes.

![Available Sites and Users](image)
4. Click and drag a site name from the Available Sites box to the Sites box on the right to add a site to the program.

**Result:** A Sites added dialog box opens.

5. Click **OK** in the dialog box.

**Result:** The dialog box closes, the Site displays in the Sites box on the right, and the site is now linked to the program.

6. Click and drag a user name from the Available Users box to the Users box on the right to add a user to the program.

**Note**
You can unlink the site from the program by dragging the site name back to the Available Sites box.
Result: A Users added dialog box opens.

7. Click **OK** in the dialog box.

**Result**: The Users added dialog box closes, the Users box on the right displays the user’s name, and the user is now linked to the program.

---

**Editing Program Information**

Perform the following steps to make changes to an existing program.

1. Click **Manage Agencies** in the EvaluationWeb landing page.
Result: The Sponsoring Agency window opens.

2. Double-click an agency name.
Result: The Programs window opens.

3. Click the name of the program you want to edit.
4. Click the **Edit Program** button.

![Image of Edit Program button highlighted]

**Result:** An information window for the selected program opens.

![Information window for selected program]

5. (Optional) Edit the program name in the **Program Name** box.

![Program Name box showing edited text]

6. Edit information in the remaining boxes in the window as needed.

7. Click the **Update Program** button at the bottom of the window.
Result: A Data Submitted dialog box opens.

8. Click OK in the dialog box to close the box and save your changes.

9. Click the ‘X’ in the upper right corner of the Program Information window to close the window.

Making a Program Inactive

Perform the following steps to make a program inactive.

1. Click Manage Agencies in the EvaluationWeb landing page.
Result: The Sponsoring Agency window opens.

2. Double-click an agency name.
Result: The Programs window opens.

3. Click the name of the program you want to make inactive.

4. Click the Make Program Inactive icon at the bottom of the Programs window.
Result: A Make Inactive dialog box opens.

5. Click Yes in the dialog box.

Result: The dialog box closes and the program is removed from the list of active programs.

Note: To view inactive programs, click the Programs dropdown arrow, and then select Inactive.

Making an Inactive Program Active

Perform the following steps to make an inactive program active.

1. Click the Programs dropdown arrow, and then select Inactive from the list.

Result: The Programs window displays inactive programs only.
2. Click the name of the program you want to make active.

3. Click the **Make Program Active** button below the Programs window.

**Result**: The program becomes active and is removed from the list of inactive programs.

**Note**: To view the active program, click the **Programs** dropdown arrow, and then select **All** or **Active**.
Deleting a Program

Perform the following steps to delete a program.

**Note**

When you delete a program, staff can no longer access the program. However, the data already entered for that program will continue to be available when running reports.

1. Click **Manage Agencies** in the EvaluationWeb landing page.

**Result:** The Sponsoring Agency window opens.
2. Double-click an agency name.

**Result:** The Programs window opens for the selected agency.

3. Click the Programs dropdown arrow, and then select All from the list.

**Result:** The Programs window displays all of your agency’s programs.

4. Click to select the program you want to delete.

5. Click the **Delete Program** icon at the bottom of the Programs window.
Result: A Delete Program dialog box opens.

6. Click **Yes** in the dialog box.

   **Result:** The dialog box closes and the program is removed from the list of active programs.

   **Note:** To view deleted programs, click the **Programs** arrow in the Programs window, and then select **All** or **Deleted**.

**Undeleting a Program**

Perform the following steps to undelete a deleted program

1. Click the dropdown arrow in the Programs window, and then select **Deleted** from the list.

   **Result:** The Programs window displays deleted programs only.
2. Click the program you want to undelete, and then click **Undelete Program** below the Programs section.

![Image of Programs for Regenstrief Agency with highlighted Undelete Program button]

**Result:** The program is removed from the list of deleted programs and a Program Restored dialog box opens.

![Image of Program Restored dialog box]

3. Click **OK** in the dialog box to close it.

**Note:** To view the program you undeleted, click the Programs dropdown arrow, and then select **All** or **Active** from the list.

![Image of Programs for Regenstrief Agency with dropdown menu expanded]

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Administrator Functions in EvaluationWeb®

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Switching to the End User Side

When needing to perform non-admin tasks such as data entry, EvaluationWeb administrators can switch their view to the “End User” view.

Perform the following steps to switch to the End User view.

1. Click **Manage Agencies** in the EvaluationWeb landing page.

Result: The Sponsoring Agency window opens.
2. Double-click an agency name.

**Result:** The Programs window opens.

3. Click to select a program in the Programs window.

**Result:** The **Switch to User** Side icon displays below the main menu on the left side of the window.
4. Click **Switch to User Side**.

**Result:** The “Select Program or Intervention” window opens, where you can view and navigate through end-user windows.

**Note:** To return to the administrator view, click the **Return to Admin** button in the lower left corner of the window.
Managing User Setup

User Access Levels

Every EvaluationWeb user account has an access level associated with it. There are 10 levels, and the level assigned to a user determines what parts of EvaluationWeb he or she has access to, and what data he or she can see.

Because of this, assigning the correct level to a new user account is very important. To preserve data security, you must ensure all user accounts are set up with the level that limits access to the data a user is authorized to see (for example, when running reports).

The table below lists all EvaluationWeb account access levels and describes the tasks and functions associated with each.

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Available to:</th>
<th>Tasks</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1</td>
<td>HD, CBO, DF CBO*</td>
<td>No tasks related to EvaluationWeb</td>
<td>None. User has no system access. Note: This level is used to add counselors to EvaluationWeb.</td>
</tr>
<tr>
<td>Level 2</td>
<td>HD, CBO, DF CBO</td>
<td>Add, edit, and view HIV test records</td>
<td>Data entry and view for a single record. Intervention only. Edit tab should only be visible if selected record is not locked.</td>
</tr>
<tr>
<td>Level 3</td>
<td>HD, CBO, DF CBO</td>
<td>Add, edit, and view HIV test records; run data reports</td>
<td>Run reports and view own health department data only (or own agency data only for CBO staff).</td>
</tr>
<tr>
<td>Level 4</td>
<td>HD, CBO, DF CBO</td>
<td>Add, edit, and view HIV tests; run data reports</td>
<td>Data entry and set own default values in HIV data-entry form. Run reports and view own health department or agency data only. HIV Test form edit mode is available only if selected record is not locked. Note: There are currently no differences between levels 4 and 5.</td>
</tr>
</tbody>
</table>

Continued…
<table>
<thead>
<tr>
<th>Access Level</th>
<th>Available to:</th>
<th>Tasks</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 5</td>
<td>HD, CBO, DF CBO</td>
<td>Add, edit, and view HIV tests; run data reports</td>
<td>Data entry and set own default values in HIV data-entry form. Run reports and view own health department or agency data only. HIV Test form edit mode is available only if selected record is not locked. Note: There are currently no differences between levels 4 and 5.</td>
</tr>
<tr>
<td>Level 6</td>
<td>HD, CBO, DF CBO</td>
<td>Add, edit, and view HIV tests; run data reports</td>
<td>Data entry for own or multiple department/agencies depending on user’s account setup. Run reports for own or multiple department/agencies depending on user’s account setup. Create and save reports for individual use only. Set own default values in HIV Test data-entry form. Toggle for allowing arbitrary file upload.</td>
</tr>
<tr>
<td>Level 7</td>
<td>HD, DF CBO</td>
<td>Upload data files, view jurisdiction-wide data in several report types, including Reflexx; key enter and edit data</td>
<td>Toggle for allowing arbitrary file upload. Note: Level 7 accounts may be available to community-based organization staff only by written request from Health Department administrators to Luther Consulting.</td>
</tr>
<tr>
<td>Level 8</td>
<td>HD, DF CBO</td>
<td>Manage administration of roles for the jurisdiction. Update/see users. Manage and unlock data records, send out jurisdiction-wide messages, set own default variables. Perform jurisdiction-wide reporting from own jurisdiction database. Upload data files. Access to all functions available to users below level 8.</td>
<td>Run reports from own jurisdiction database. Add and edit reports which can be published for the jurisdiction or agencies in the jurisdiction. Toggle for allowing arbitrary file upload.</td>
</tr>
<tr>
<td>Access Level</td>
<td>Available to:</td>
<td>Tasks</td>
<td>Permissions</td>
</tr>
<tr>
<td>-------------</td>
<td>----------------</td>
<td>----------------------------------------------------------------------</td>
<td>------------------------------------------------------------------</td>
</tr>
<tr>
<td>Level 9</td>
<td>HD, DF CBO</td>
<td>Access to all functions of Level 8 users and below. If &quot;Allow Admins to add worker&quot; is set to ‘Yes,’ Level 9 users can add or tag delete workers.</td>
<td>Same as Level 8 with the additional permissions: Add, edit, tag delete agencies, programs, and interventions for own jurisdiction; edit user information and add Level 1 users for own jurisdiction. Upload data files, switch between data upload and direct data entry, and run reports related to data file upload and quality assurance.</td>
</tr>
<tr>
<td>Level 10</td>
<td>Luther Consulting</td>
<td>Manages setup information for all agencies and maintains funding status of all agencies. Manages users, agencies, interventions, and programs. Access to all jurisdictions.</td>
<td>Manage permissions for all functions for all users, including EvaluationWeb Administrators and non-administrators.</td>
</tr>
</tbody>
</table>

*HD: State/territorial/city health departments receiving direct funding from CDC  
CBO: Community-based organizations  
DF CBO: Community-based organizations receiving direct funding from CDC

**Selecting a User to Manage**

Perform the following steps to select a user to manage.

1. Click **Manage Users** in the EvaluationWeb landing page.
Result: The Users window opens.

2. Click the **View** dropdown arrow in the Users window, and then select a user account type from the list.

Continued…
Result: The Users window displays user names from the category you selected. Each name is accompanied by an account status icon.

> Tip

- Users are ordered alphabetically by last name. You can also order them by ID by clicking the Local ID button.
- Descriptions of the account status icons are given in Appendix A.

3. (Optional) Click the user status dropdown arrow and select a status from the list.
**Result:** The user list displays users having only the status you selected.

4. (Optional) Type any part of a user name in the search box to filter the list of names.
   **Result:** The list displays user names having only the characters you typed.

5. (Optional) Click an agency name in the “View by Agency” section of the window.
   **Result:** The user list displays users associated only with the agency you selected.
6. Click to select a name in the list of user names.

**Result:** Information for the selected user displays to the right of the user name list.
Editing User Information

EvaluationWeb administrators can access user information windows to edit or update account information for users.

Perform the following steps to make changes to a user's EvaluationWeb account.

1. Select a user account.
2. Click the Edit User button.
Result: An information window for the selected user opens, with the User Information tab active.

3. Make desired changes to the items in the User Information view.

⚠️ Warning

To limit who can see your agencies’ data, the “Allow reporting on full agency?” and “Report on associated programs in other agencies?” check boxes are rarely used. If you feel one or both of these permissions are necessary for a particular user, contact the Luther Consulting Help Desk for confirmation.
4. Click **Update User**.

**Result:** Your changes are saved and a Data Submitted dialog box opens.

5. Click **OK** to close the dialog box.
6. Click the Program Associations tab.

**Result:** The Available Programs section displays a list of active programs. The Chosen Programs section displays a list of active programs currently assigned to the selected user.

7. Select one or more programs in the Available Programs list, and then click the arrow pointing to the right.
Result: A Data Submitted dialog box opens.

8. Click **OK** to close the dialog box.

**Result:** The selected programs display in the Chosen Programs area.

9. Click the ‘X’ in the upper right corner of the User Information window to close the window.

---

**Tip**

To select multiple programs, press and hold the **Control** key on your keyboard while clicking the programs you want to select.
Creating a New User Account

Jurisdictions Using the CDC Instance of EvaluationWeb

New staff members in these jurisdictions needing an EvaluationWeb account will contact Lourdes Gordillo at CDC to begin the new account process. Lourdes will send detailed instructions on how to complete this process. Lourdes contact information is:

- Lourdes Gordillo
- hkq7@cdc.gov
- 404.639.1937

Once the new user has completed the new account process with Lourdes, she will send a notification to that effect. At that point, the user should call the Luther Consulting Help Desk, who will complete final setup of the EvaluationWeb account:

- Luther Consulting Help Desk
- help@lutherconsulting.com
- 866.517.6570 option 1

Jurisdictions Using Their Own Instance of EvaluationWeb

New staff members in these jurisdictions who need an EvaluationWeb account should contact their administrator within the jurisdiction; anyone in the jurisdiction with an administrator-level EvaluationWeb account can create EvaluationWeb accounts for new users. (Note: some jurisdictions have a dedicated person who creates all new user accounts.) See the next section for instructions.

Steps for Creating a New account

Perform the following steps to create a new user account.

Result: The Users window opens, displaying a list of users in your department.
2. Click the plus sign icon below the list of users.

Result: The New User window opens with the User Information tab active.
3. Type information in the following boxes:
   - User ID
   - First Name and Last Name
   - E-mail Address
   - HIV Test User Code
   - Worker ID (this may be “PEMS/Local Worker ID” for some jurisdictions)

4. Click the **Access Level** dropdown arrow and select a level in the list.
5. Click the **Sponsoring Agency** dropdown arrow, and then select an agency from the list.

6. (Optional) Click the **Use contact info for Agency** check box.

**Result:** EvaluationWeb will use your department’s contact info as the new user’s contact information.
7. Click **Update User** at the bottom of the Security Setting section of the window.

   ![User Information](image)

   **Security Settings**
   - Allow Arbitrary Uploads
   - Allow CBO User Side Uploads
   - Allow reporting on full agency?
   - Report on associated programs in other agencies?

   **Update User** button is highlighted.

   Result: A Data Submitted dialog box opens.

   ![Data Submitted](image)

   **Reminder**
   To limit who can see your jurisdiction’s data, you will not normally check the items in the Security Settings section of the window. If you feel you need to select one of these permissions, please contact the Luther Consulting Help Desk for confirmation.

   **Result**: A Data Submitted dialog box opens.

8. Click **OK** in the dialog box.

   **Result**: The dialog box closes and the new user is saved.

   **Reminder**
   The new user will not be able to enter data until you have linked an active program to the user’s account. Instructions for linking an active program are given in the next section.
Linking a Program to a User Account

After creating a user account, you will link one or more local programs to it. Doing this is what adds the user’s name to various windows of EvaluationWeb, allowing the user to enter data.

Perform the following steps to link a program to a user account.

1. Select a user to manage.
2. Click the Edit User button.

**Result:** EvaluationWeb displays the selected user’s information page.

3. Click the Program Associations tab in the user’s information page.
Result: the Program Associations tab displays Available Programs in your department or agency.

4. Click a program name in the Available Programs box to select a program.

Tip: To select multiple programs, press and hold the **Control** key on your keyboard while clicking desired programs.
5. Click the arrow pointing to the right.

**Result:** A Data Submitted dialog box opens.

6. Click **OK** in the dialog box to close it.

**Result:** EvaluationWeb displays the selected program in the Chosen Program box. The program is now linked to the user in EvaluationWeb.
7. Click the ‘X’ in the upper right corner of the User Information window to close it.

![Image of Program Associations window](image)

**Note**

You can remove programs from a user's account by selecting the programs you want to remove, and then clicking the arrow pointing to the left. The selected programs will move back to the Available Programs box.

![Image of Available Programs and Chosen Programs](image)

### Deleting a User Account

EvaluationWeb administrators can delete user accounts in cases such as a staff member leaving employment or no longer needing access to EvaluationWeb.

Perform the following steps to delete a user account from EvaluationWeb.

1. **Select a user to manage.**
2. Click the **Delete User** icon at the bottom of the user name list.

**Result:** A Delete User dialog box opens.

**Note:** Icons next to the names in the user name list indicate the status of each user’s account. See Appendix A for explanations of the icons.
3. Click **Yes** in the dialog box.

   **Result:** The dialog box closes and a User Removed dialog box opens.

4. Click **OK** in the dialog box.

   **Result:** The dialog box closes and the user is deleted from the list of current users.

---

**Restoring a Deleted User**

Perform the following steps to restore a previously deleted user.

1. Click **Manage Users** in the EvaluationWeb landing page.
2. Click the dropdown arrow below the list of users on the Users window, and then select **Deleted** from the list.

**Result:** The Users window displays a list of deleted users only.

3. Click the name of the user you want to restore.
4. Click **Restore User** below the list of users.

![User List with Restore User option highlighted](image)

**Result:** A User Restored dialog box opens.

![User Restored dialog box](image)

5. Click **OK** in the dialog box to close it.

**Result:** The selected user is removed from the list of deleted users.

Continued…
Note

To view the restored user, click the dropdown arrow below the list of users, and then select **Current** or **All** from the list.

Continued…
Viewing the EvaluationWeb User Agreement

EvaluationWeb prompts all users to read and complete a user agreement the first time they log in to EvaluationWeb. This document explains the rules of use that ensure data security and the legal requirements of EvaluationWeb use.

Perform the following steps to view the EvaluationWeb User Agreement and Rules of Behavior document.

1. Click **Manage Users** in the EvaluationWeb landing page.

2. Select the person in the Users list whose user agreement you want to view.
3. Click **Edit User**.

![Image of User Information view](image)

**Result:** The User Information view displays information for the selected user.

![Image of User Information form](image)
4. Click **View User Agreement** in the lower right corner of the window.


![EvaluationWeb User Agreement and Rules of Behavior document](image)

5. Click the ‘X’ in the upper right corner of the window when finished reading the agreement to close it.
Using System Utilities Functions

Viewing & Submitting EvaluationWeb Change Requests

Perform the following steps to:
- View change requests your agency has previously submitted
- Submit new change requests

1. Click **System Utilities** in the EvaluationWeb landing page.

2. Click **Change Request System**.
**Result:** EvaluationWeb displays a list of previously submitted change requests.

3. Click **Add New Change Request**.

**Result:** The New Change Request window opens.
4. Type a **Title** and a **Description** in the New Change Request window.

![New Change Request Window]

5. Click **Submit Change Request** at the bottom of the New Change Request window.

**Result:** The New Change Request box closes, and the change request system displays your new request in the list of change requests.

![Change Request List]

**Setting System Variables**

You can use the System Variables module to select how certain variables display and which variables display in EvaluationWeb.

However, keep in mind that since CDC no longer requires Aggregate Data or Client-Level Data, the System Variables page is no longer updated, and many of the variables in this section may no longer apply to your health department.
1. Click the **System Utilities** button in the EvaluationWeb landing page.

   ![System Utilities Button](image1)

2. Click **Set System Variables**.

   ![Set System Variables](image2)

---

**Note**

Depending on your EvaluationWeb account setup, you may not be able to make changes in certain sections of the Set System Variables module. In this case, contact the Luther Consulting Help Desk for changes to be made.
**Result:** The settings window opens.

3. Type or select information for each value in the System Wide Settings section of the window.

4. Click the **Manage HD Variables** button in the Manage Visible Variables section.
Result: A window for selecting Health Department variables opens.

5. Click check boxes to select or deselect the variables you would like EvaluationWeb to display in data entry windows.

6. Click **Update** at the bottom of the window.

**Result:** A Data Submitted dialog box opens.

7. Click **OK** in the dialog box to close it.
8. Click the **Manage CBO Variables** button in the Manage Visible Variables section of the settings window.

![Manage Visible Variables](image)

**Result**: A window for selecting community-based organization variables opens.

![Selection Window](image)

10. Click the dropdown arrow in the HIV Testing Specific Variables section of the window.

11. Select a response from the list.

12. Click **Update System Variables** at the bottom of the window to submit and save your selections.

**Result:** A Data Submitted dialog box opens.

13. Click **OK** in the dialog box to close it.
Managing Program Award and ZIP Code Lists

Perform the following steps to modify or update the Programs Awards and ZIP codes for your jurisdiction or department’s instance of EvaluationWeb.

1. Click the **System Utilities** button in the EvaluationWeb landing page.

2. Click **Manage Lists**.
**Result:** The Local Risks & Recommended Programs window opens.

3. Click the **Manage Program Awards** button.

**Result:** The Manage Program Awards window opens.
4. Perform one or more of the following actions:
   a. Click **Update** to modify the information for a program award.
   b. Click **Delete** to delete a program award.
   c. Click **Add New Program Award** at the bottom of the page to add information for a new program award.

5. Click the ‘X’ in the upper right corner of the Manage Program Awards window to close it.

6. Click **Manage Zip Codes** in the Local Risks & Recommended Programs window.
**Result:** The Manage Zip Codes window opens.

7. Perform one or more of the following actions:
   a. Click **Update** to modify a zip code.
   b. Click **Delete** to delete a zip code.
   c. Click **Add New Zip Code** at the bottom of the page to add information for a new zip code.

8. Click the ‘X’ in the upper right corner of the Manage Zip Codes window to close it.
Making Data Collection Form Labels

1. Click **System Utilities** in the EvaluationWeb landing page.

2. Click **Create Form Labels**.
Result: EvaluationWeb displays the form labels settings window.

3. Select the settings you want for your labels.
4. Click **Print** in the lower right corner of the window.
Result: EvaluationWeb sends your form labels to your system as a PDF file. Open the file to print your labels.

Note: Depending on which browser you use and how it is set up, your browser may display the PDF file differently from what is shown in the screen shot above. It may display the PDF in a dialog box, or you may need to open your Downloads folder to see it.
Deleting an HIV Test from EvaluationWeb

EvaluationWeb administrators have the ability to delete a test form that was entered in error. Follow the steps below to delete a form.

1. Click **Manage Data** in the EvaluationWeb landing page.

2. Click the **HIV Testing** button.
**Result:** The HIV Testing data management window opens with the Current Slip tab active. The Current Slip view displays two sections, one for data in PS18-1802 format, and one for data in other formats.

3. Click the filtering box in either section of the Current Slip view, and then type any part of a Form ID.

**Result:** The dropdown box displays a list of Form IDs matching the characters you typed.
4. Click to select the Form ID for the record you want to delete.

Result: The Current Slip view displays the Form ID (in its long form) that you clicked.

5. Click the Submit button in the page section you are working in.
Result: The Display Test Info view displays the information from the Form ID you search for.

6. Click the **Delete Test** tab.

Result: the Delete Test view verifies whether you really want to delete the test.
7. Click the **Delete Test** button.

   **Result:** EvaluationWeb displays a verification dialog box.

   ![Verification Dialog Box]

   Form ID has been deleted. Please click on 'Current Slip' to select a different test.

8. Click **OK** in the dialog box.

   **Result:** The dialog box closes and the test is deleted from the database.
Appendix A: User Icon Descriptions

DELETED AND AUTHORIZED  
A state of “Deleted and Authorized” means the user has satisfied both CDC and Luther Consulting requirements for being authorized to use the system but the account associated has been deleted by an administrator.

DISABLED AND AUTHORIZED  
“Disabled and Authorized” accounts are accounts where the user did satisfy both the CDC and Luther Consulting requirements for being authorized and where the user account has not been used for 60 days after a successful log in. Reversing the disabled marker is possible with the help of a level 9 or 10 user.

DELETED AND DISABLED AND AUTHORIZED  
A state of “Deleted and Disabled and Authorized” means the user has satisfied the CDC and Luther Consulting requirements for eAuthentication AND the account has not been used for 60 days after a successful log in AND the account has been deleted by an administrator.

LOCKED AND AUTHORIZED  
A state of “Locked and Authorized” is seen when a user has satisfied the CDC and Luther Consulting requirements for eAuthentication and where the user has had five or more unsuccessful attempts to log into the system, within the past 2 hours. The user must wait a period of 15 minutes for the lock to open. Technical Support cannot manually unlock a user account.

AUTHORIZED  
This state signifies the user has provided the necessary information to CDC and to Luther Consulting for eAuthentication.

DELETED AND NOT AUTHORIZED  
This state means the end user never satisfied the requirements for eAuthentication and that the account has been deleted by an administrator.

NOT AUTHORIZED  
This state means the end user has not satisfied the requirements for eAuthentication. In this state, the account is essentially unusable.