AgView Training

Registration Starter Guide for
State Animal Health Officials (SAHOs)

Acknowledgements

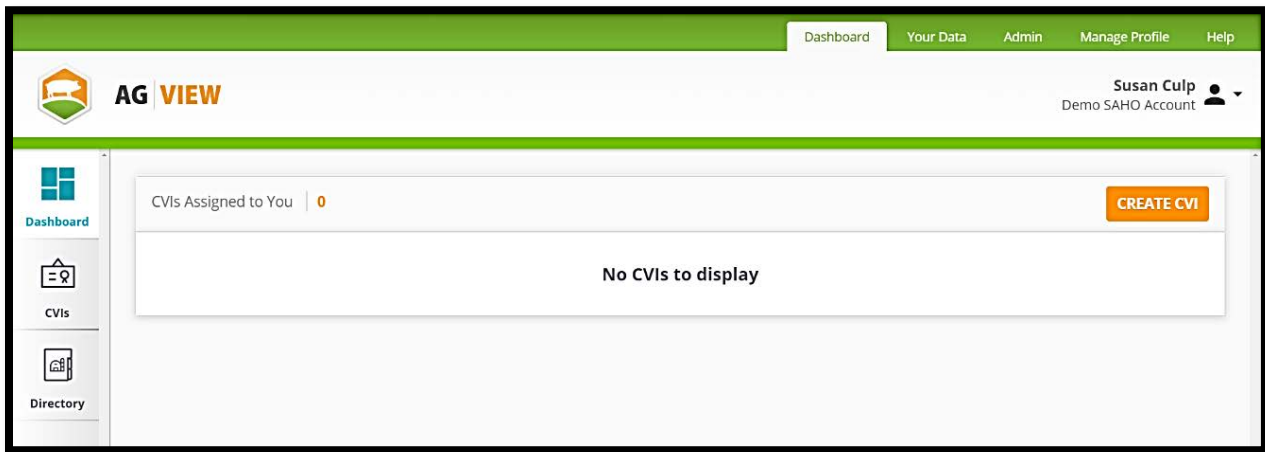This training guide was created by the Institute for Infectious Animal Diseases.
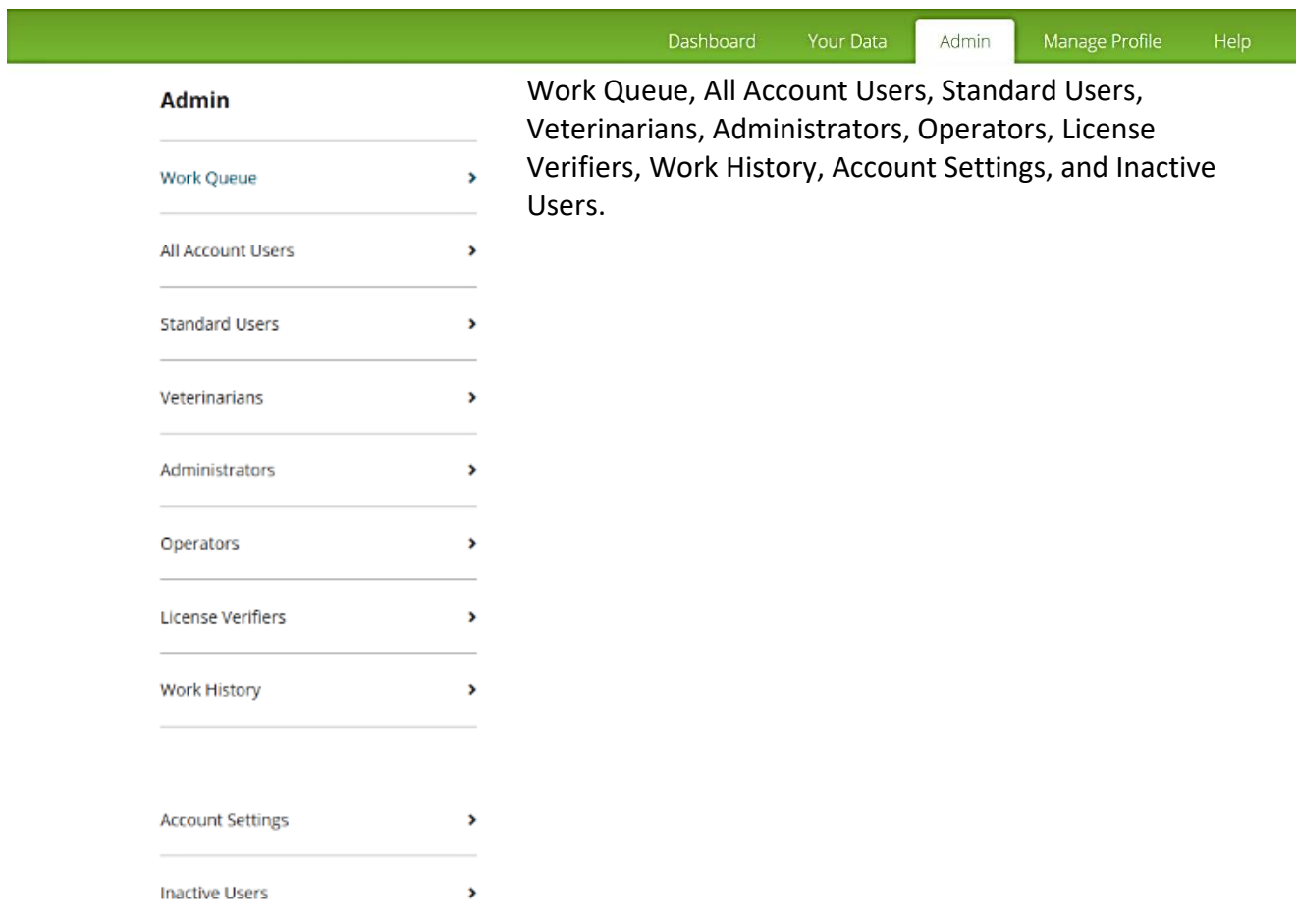
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PART I: AGVIEW ACCOUNT SETUP

Upon logging in at agview.com, the initial administrator will land on the "Dashboard" page.
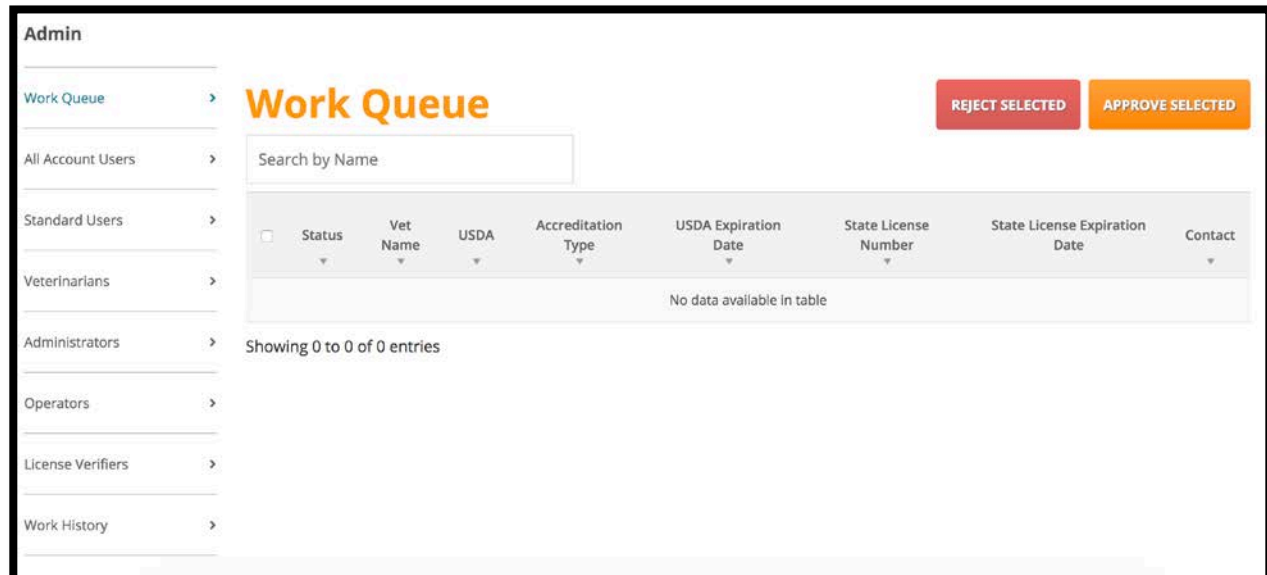

Click on the "Admin" button in the upper right-hand corner to navigate to the Admin Page. On the Admin Page, there is a list of tabs on the left-hand side of the screen:

Work Queue, All Account Users, Standard Users, Veterinarians, Administrators, Operators, License Verifiers, Work History, Account Settings, and Inactive Users.
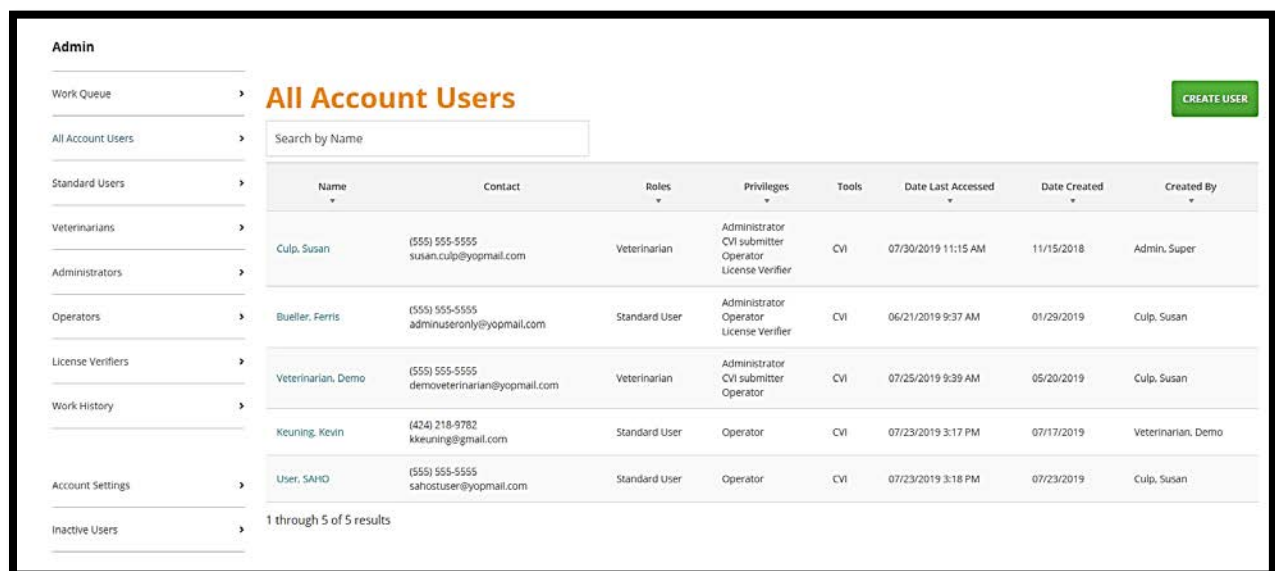
WORK QUEUE

List of all veterinarian users who are pending approval to use the AgView CVI tool to write certificates of veterinary inspection for your state (includes both external veterinarians and internal SAHO personnel).

> **NOTE:** If you have opted to have the system auto-approve veterinarians to use the AgView CVI tool (more information can be found in **Section 1.1: Account Settings**), your Work Queue will remain empty as there will be no pending approvals.

ALL ACCOUNT USERS

List of all <u>internal</u> users who have accounts for the SAHOs office.

STANDARD USERS

List of all SAHO Organizational Account internal users with the Standard User role. Standard Users have the ability to fill out CVIs and assign CVIs to veterinarians for completion/signature.

VETERINARIANS

List of all SAHO Organizational Account internal users with the Veterinarian role. Veterinarians have the ability to fill out and sign CVIs.

ADMINISTRATORS

List of all SAHO Organizational Account <u>internal</u> users who have the administrator privilege. Administrators are responsible for creating and managing individual accounts for the SAHOs office.

> **NOTE:** AgView Support highly recommends that there are at a minimum of two users with administrative privileges.

OPERATORS

List of all SAHO Organizational Account <u>internal</u> users who have the operator privilege. Operators are responsible for managing data within the SAHO Organizational Account.

> **NOTE:** This role is important for the larger AgView tool that will be coming out in the future.

LICENSE VERIFIERS

List of all SAHO Organizational Account <u>internal</u> users who have the license verifier privilege. License verifiers manage external veterinarian AgView CVI permissions.

> **Note:** This privilege is only relevant if your state is manually approving external AgView CVI users (more information can be found in **Section 1.1: Account Settings**).

WORK HISTORY

List of veterinarian users who were previously approved to use the AgView CVI tool to write certificates of veterinary inspection for your state (including which internal license verifier approved the veterinarian). More information over actions the SAHO administrator can perform via the Work History tab can be found in **Section 4.2: Revoking Permission**.

ACCOUNT SETTINGS

Contains account preferences such as the email(s) that you would like to receive new license verification requests and CVI submission notifications, and which tools your state has access to (currently, CVI is the only tool available). More information over how to edit these preferences can be found in **Section 1.1: Account Settings.**

INACTIVE USERS

Provides a list of SAHO Organizational Account <u>internal</u> user accounts that have been deactivated.

> **NOTE:** These are accounts that were deactivated by your organization's administrator(s). More information about deactivating accounts can be found in **Part III: Editing Users**.

SECTION 1.1: ACCOUNT SETTINGS

Account Settings >

Click on the Account Settings tab under the admin tab to access preferences (new license verification requests and cvi submission notification) and tools (access to) for your organization.

Account Settings: Preferences

There are two types of preferences:

1. New License Verification Requests
2. CVI Submission Notification

New License Verification Requests

Allows you to decide how you want to handle and be notified of AgView CVI account requests submitted by veterinarians from within your state.
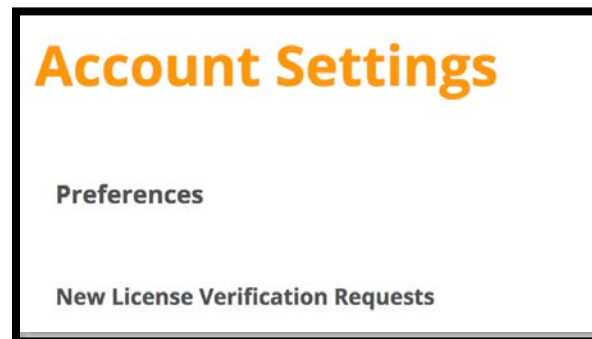
Option 1: Auto-Approval for License and Accreditation (the system automatically approves veterinarians requesting to use AgView within your state):

By selecting Auto-Approval for License and Accreditation you are electing to have the system automatically approve all CVI account requests form veterinarians in your state. This will allow them to sign and submit CVIs in your state without your explicit approval.

1. Click the black "Edit" button in the upper right-hand corner of the page.
2. Click the circle next to "CVI Account: Auto-Approval for License and Accreditation".
3. Click the orange "Save" button in the upper right-hand corner of the page

Option 2: Manual Approval (license verifier listed will approve veterinarians requesting to use AgView within your state); this is the default setting for newly created SAHO AgView accounts:

By selecting Manual Approval for License and Accreditation you are electing to manually approve all CVI account requests form veterinarians in your state. This will prevent them from signing and submitting CVIs in your state without your explicit approval.

Account Settings

Preferences   CANCEL   SAVE

New License Verification Requests

○ CVI Account: Auto-Approval for License and Accreditation ⑦

⦿ CVI Account: Manual Approval ⑦

Please enter the email addresses below to be notified each time a verification request is received.

Email Addresses: *(separate with commas)*

susan.culp@yopmail.com ✕

1. Click the "Edit" button in the upper right-hand corner of the page.
2. Click the circle next to "CVI Account: Manual Approval".
3. Enter email addresses for SAHO personnel to receive a notification each time a new AgView CVI account request is received.
   Note: The email address for the SAHOs initial administrator will be the default recipient for new CVI account requests.
4. Click the orange "Save" button in the upper right-hand corner.   SAVE

SECTION 1.1: ACCOUNT SETTINGS Continued

Click on the Account Settings tab under the admin tab to access preferences (new license verification requests and cvi submission notification) and tools (access to) for your organization.

Account Settings: Preferences cont.
There are two types of preferences:
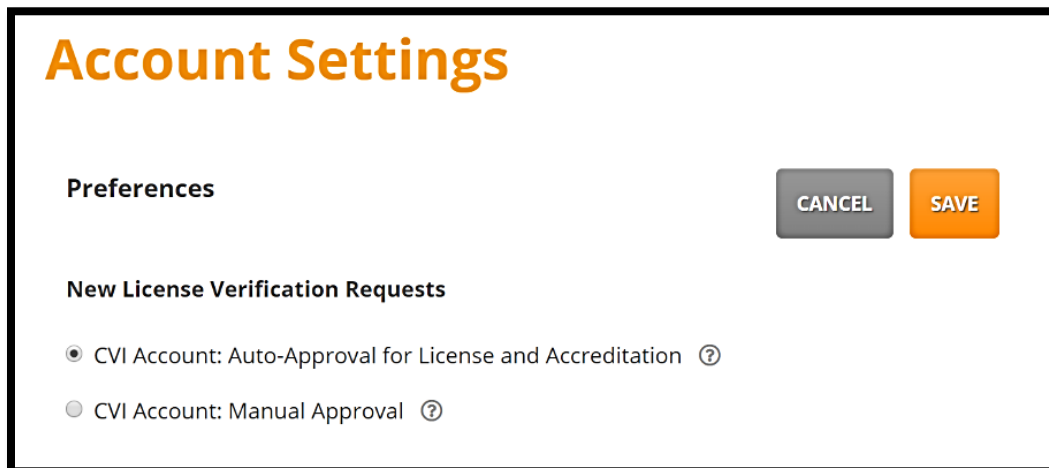1. New License Verification Requests
2. CVI Submission Notification

CVI Submission Notification
Allows you to designate email address recipients based on CVI type (large or small animal and import or export). Any designated recipients will receive an email with attached PDF and XML files for every submitted AgView CVI related to your state.
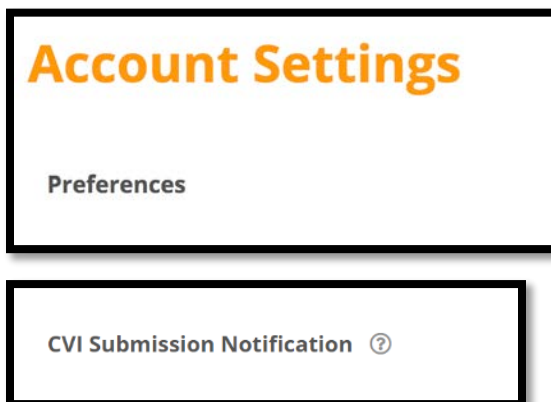
CVI Submission Notification Categories (3 Total):
1. Small Animal (All, Import Only, Export Only)
2. Large Animal (All, Import Only, Export Only)
3. All (both Small and Large Animal CVIs & both Import and Export CVIs)
   Note: By default, all accounts are setup with 'All' for CVI Submission Notifications checked and the initial administrator's email address listed (as shown in the image below).

To ADD CVI Submission Notifications:
1. Click the black "Edit" button in the upper right-hand corner of the page.
2. Check the checkbox next to the relevant category (Small Animal, Large Animal, or All).
3. Enter email address recipients.

4. Click the "Save" button in the upper right-hand corner of the page.

To remove CVI Submission Notifications:
1. Click the black "Edit" button.
2. Uncheck the checkbox next to the relevant category (Small Animal, Large Animal, and/or All).
3. Click the orange "Save" button in the upper right-hand corner of the page.

SECTION 1.1: ACCOUNT SETTINGS Continued

Dashboard   Your Data   Admin   Manage Profile   Help

Account Settings   >

Click on the Account Settings tab under the admin tab to access preferences (new license verification requests and cvi submission notification) and tools (access to) for your organization.

Account Settings: Tools Access

This section shows you what tools your state has been approved to use. In the future, this section will also allow you to request access to a tool or tools your state is not currently using.

> **Note:** Currently, CVI is the only tool available to SAHO accounts.

Tools Access

Access to: ✓ CVI ⓘ

PART II: CREATING USERS

Any user with the administrator privilege can add new users to the organization.

Follow the steps below to add SAHO personnel:
1. From any of the All Account Users tab, click on the 'Create User' button in the upper right-hand side of the page.

CREATE USER

2. Select the user's role (Standard User or Veterinarian) by clicking the associated button.

Create a new user

Standard User	Veterinarian
The standard user is responsible for:	**The veterinarian is responsible for:**
• Utilizing the AgView dashboard (if organization is using the AgView tool)	• Filling out and submitting field data reports (if organization is using the Health Reports tool)
	• Adding comments and diagnoses to field data reports (if organization is using the Health Reports tool)
	• Filling out and signing CVIs (if organization is using the CVI tool)
	• Utilizing the AgView dashboard (if organization is using the AgView tool)
	• Receiving war time messages (if organization is using the AgView tool)

3. Select any relevant privileges by checking the boxes.
   Note: You do not have to assign any privileges to a user. The 'License Verifier' privilege is only available if you have selected to manually approve new license verification requests. AgView Support highly recommends that there are at a minimum of two users with administrative privileges.

☐ Administrator

The administrator is responsible for:
• Creating and managing individual organization user accounts

☐ Operator

The operator is responsible for:
• Managing organization data uploads
• Reconciling organization data issues

☐ License Verifier

The License Verifier is responsible for:
• Manually reviewing and approving all CVI account requests from veterinarians within their state

4. Check the box next to "CVI" to grant the user access to the AgView CVI tool.

Tools Requested *

Access to: ☐ CVI ⑦

5. Fill out the user's information.

> **NOTE:** Email addresses can only be used once within an organization (i.e., the same email address cannot be used for both a standard user and a veterinarian).

User Information

User Email *

Verify User Email *

User First Name *   User Middle Name   User Last Name *

User Phone *

CANCEL   CONTINUE

6. If the user is a 'Veterinarian' and should be allowed to submit CVIs on behalf of the state, check the box next to "Allow this veterinarian to submit CVIs".

☐ Allow this Veterinarian to submit CVIs

7. Enter the veterinarian's accreditation number. The system will check for any existing licenses associated with that accreditation number. Any previously entered license information will be displayed in the licenses table.

> **NOTE:** The SAHO veterinarian user will still have to be approved via the Work Queue prior to having signature authority on a CVI.

Accreditation and Licenses

Without verifying accreditation, a user may not submit CVIs.

Please enter USDA Accreditation number below to check the system for existing licenses associated with the accreditation.

USDA Accreditation Number: *

Accreditation Type:*
Select ▼

Accreditation Expiration

If the lookup does not return any licenses, or the veterinarian has any additional licenses, add them by clicking the "Add State License" button. Click "Remove" to delete any licenses entered by mistake.

ADD STATE LICENSE

Licenses

Veterinarians may only submit CVIs in states for which they are licensed.

Issuing State *	License Number *	License Expiration *	
Select ▾			REMOVE

ADD STATE LICENSE

8. Click the green "Continue" button in the bottom right-hand corner of the page.

CONTINUE

9. Review the user's information. If everything looks correct, click "Create User." Click "Previous" to make any needed changes.

PREVIOUS **CREATE USER**

10. An email will be sent to the newly created user that includes instructions for resetting his/her password.

Success

You have successfully created the user. Please see below for user details. An email confirmation will be sent to the new user shortly.

> **Note:** After resetting the password, the user will be able to immediately login to AgView.

PART III: EDITING, DEACTIVATING and REACTIVATING Users
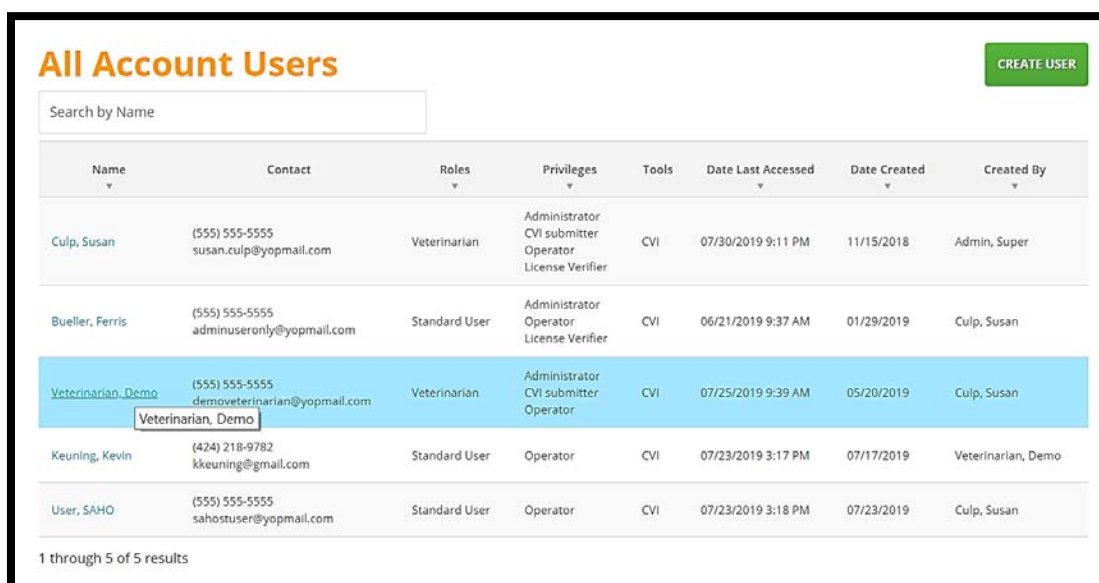
Any user with the administrator privilege can edit, deactivate and reactivate users within the organization at any time.

Editing: Adding or Removing Privileges and Updating User Info:
Steps for making various edit types can be found below:

1. Find the user by searching within the "All Account Users" tab or in his/her role or privilege category. Click on the user's name (will be a clickable link).

2. Click the black "Edit" button in the bottom right-hand corner of the page.
3. Make the necessary edits (e.g., update user information, add or remove privileges).
4. Click the orange "Update User" button in the bottom right-hand corner of the page.
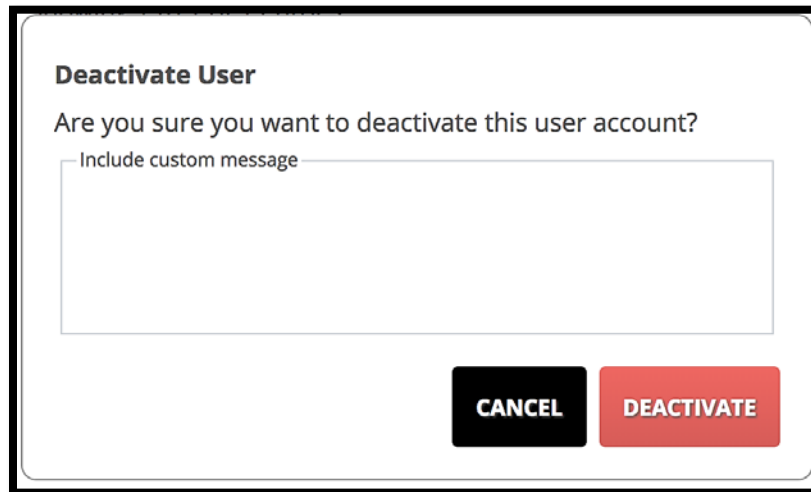
Deactivating Users

Follow the steps below to deactivate a user.

    Note: Deactivated users can always be reactivated. See "Reactivating Users" below:

1. Find the user by searching within the "All Account Users" tab or in his/her role or privilege category. Click on the user's name (will be a clickable link).

2. Click the black "Edit" button   **EDIT**   in the bottom right-hand corner of the page.

3. Click the red "Deactivate" button   **DEACTIVATE**   in the bottom left-hand corner of the page.

4. Enter a custom message to provide a reason for deactivation. This message will be emailed to the user.

5. Click "Deactivate" to officially deactivate the account or click "Cancel" if you change your mind.

Reactivating Users

Follow the steps below to reactivate a previously deactivated user.

1. Find the user by searching in the "Inactive Users" tab. Click on the user's name (will be a clickable link).

2. Click the black "Edit" button   **EDIT**   in the bottom right-hand corner of the page.

3. Click the orange "Activate" button in the bottom right-hand corner of the page. The user is now reactivated.   **ACTIVATE**

4. The user will receive an email letting him/her know the account has been reactivated that includes a password reset link.

PART IV: CVI ACCOUNT LICENSE VERIFICATION

The following sections explain the steps a user with the license approver privilege should take to manage veterinarians' permissions to use the AgView CVI tool.

SECTION 4.1: WORK QUEUE

	Dashboard	Your Data	Admin	Manage Profile	Help

Work Queue ❯

Any user with the license verifier privilege can review AgView CVI veterinarian user requests via the Work Queue tab

NOTE: The Work Queue tab is the default page when selecting the "Admin" tab for all users that have administrative and/or license verifier privileges.

Follow the steps below to manage incoming CVI account license verification requests.

1. Click on the "Work Queue" tab.
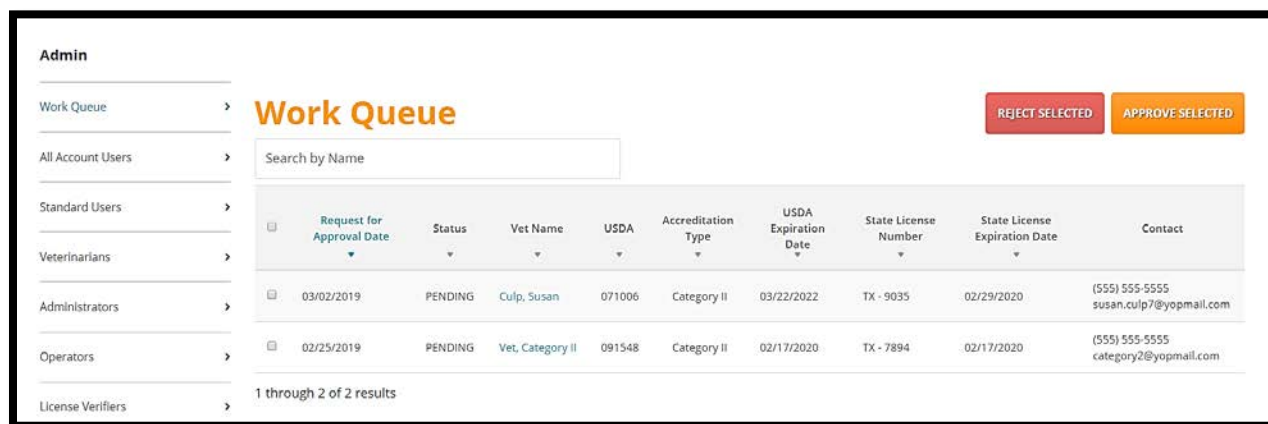
2. Click the box to the left of the user's (or multiple users) name(s).
3. Click either "Approve Selected" or "Reject Selected".

REJECT SELECTED   **APPROVE SELECTED**

4. The user will receive an email letting him/her know the state's decision (either approved or rejected).

> **NOTE:** A veterinarian's CVI permission status can always be updated by following the process outlined above.

SECTION 4.2: REVOKING PERMISSION

| | Dashboard | Your Data | Admin | Manage Profile | Help |

Work History   ❯   Any user with the license verifier privilege can reject previously approved veterinarians via the work history tab.

Follow the steps below to manage AgView CVI veterinarian users within your state.

1. Click on the "Work History" tab.

Admin

Work History

	Status	Status Date	AHO Admin	Vet Name	USDA	Accreditation Type	USDA Expiration Date	State License Number	State License Expiration Date
☐	REJECTED	07/30/2019	Culp, Susan	Culp, Susan	055443	Category II	03/31/2019	TX - 7777	06/12/2022
☐	REJECTED	07/30/2019	Culp, Susan	Culp, Susan	066875	Category II	05/31/2019	TX - 7890	05/31/2019
☑	APPROVED	07/17/2019	Culp, Susan	User, Example	098098	Category II	07/31/2019	TX - 012210	07/31/2019
☐	APPROVED	07/08/2019	Culp, Susan	StgVetOne, DecOneNine	039485	Category I	07/02/2020	TX - 000009888999000	12/24/2018
☐	REJECTED	06/28/2019	Culp, Susan	test, test	093333	Category I	03/24/2019	TX - 2333	03/31/2019
☐	REJECTED	06/28/2019	Culp, Susan	Vet, XYZ	000777	Category II	06/29/2019	TX - 777	06/29/2019

Sidebar: Work Queue, All Account Users, Standard Users, Veterinarians, Administrators, Operators, License Verifiers, Work History, Account Settings, Inactive Users

REJECT SELECTED

2. Click the box to the left of the user's (or multiple users) name(s).
3. Click "Reject Selected".

REJECT SELECTED

4. Enter a custom message to provide a reason for the rejection. This message will be emailed to the user (or users if multiple are selected).
5. Click "Reject" to officially revoke CVI permissions or click "Cancel" if you change your mind.

Reject Request
Comment to include with denial email *

[CANCEL]   [REJECT]

Glossary

Administrator
An AgView privilege that allows the user to create and manage individual accounts for an organization

AgView
Tool that allows data visualization, analysis, and controlled sharing of multiple types of data including premises, movements, laboratory test results and observational data

Auto-Approval for License and Accreditation
AgView system automatically approves all CVI account requests from veterinarians in the state (allows signing of CVIs without state's explicit approval)

Certificate of Veterinary Inspection (CVI)
Tool that allows users to generate electronic CVI's via either a desktop or mobile application

Consignor
The person or entity sending the animal(s)

Consignee
The person or entity receiving the animal(s)

Data Schema
Template for uploading data into the AgView system

CVI Address
Saved location information that can be used to load consignor and consignee information into a CVI

License Verifier
An AgView animal health official privilege that allows the user to manually review and approve all CVI account requests from veterinarians within the state

Manual Approval
Animal health official manually approves all CVI account requests from veterinarians in the state (prevents signing of CVIs without state's explicit approval)

Operator
An AgView privilege that allows the user to manage data for an organization

Category 1
Permission to use the Small Animal Certificate of Veterinary Inspection (excludes food and fiber species, horses, birds, farm-raised aquatic animals, all other livestock species, and zoo animals that can transmit exotic animal diseases to livestock)

Category 2
Permission to use both the Large and Small Animal Certificate of Veterinary Inspection (all animals)

Questions or concerns?

Contact AgView Support

Available Monday – Friday,
8:00 am – 5:00 pm Central Time

Phone: (800) 767-6888
Email: support@agview.com