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System Overview
The Accreditation Five-Year Online System (AOS) is a platform designed to serve the needs of the CSBS Accreditation Program, and the participating state agencies. The AOS environment facilitates an online accreditation process for agency users and a review and audit process for reviewers and CSBS internal staff. The initial release of this platform will include functions from Iteration 1 (this includes the management, scheduling, and review of the Self Examination Questionnaire (SEQ)) as well as functions from Iteration 2 (this includes the final portion of the processing of the SEQ, as well as numerous administrative actions and new reporting functionality).

User Privileges and Actions
System access will be facilitated at the highest level by a CSBS internal staff member, and at the agency level by the point of contact for a specific agency. Agencies can have as many users as needed to complete the SEQ. Review team members, audit team members, and facilitators will have access granted by the CSBS staff and will receive an email notification after they have been successfully entered into the system. Access to the AOS site is facilitated by single-sign-on through Okta for both CSBS and external users. After gaining access to the system, specifications and dashboards will be available based upon an individual user’s role within the AOS system.

System Roles
CSBS Accreditation Staff
CSBS accreditation staff users are central to the system. A CSBS accreditation staff user ensures the accreditation process is completed smoothly. They are responsible for initiating the process by creating all other users (Agency, Review Team etc.), managing the user access, managing and assigning the SEQs to agencies, assigning the review team and audit team to review completed SEQs, scheduling accreditation review and accredit the agency based on recommendations of review team and audit team. A CSBS accreditation staff user is also interested in reviewing the data created during accreditation process in the form of reports and dashboards. They can view high level roll-ups of agency scores as well as historical SEQ data. This user also has access to several administrative actions regarding system wide announcements and resource documents. Learn more about the actions available to this user here.

Agency Point-of-Contact
An agency POC user logs into the system to facilitate completion of the self-evaluation questionnaire (SEQ) once it is due. They are responsible for ensuring that the SEQ is completed well ahead of the review date. This user can create new users in their agency and manage those users’ access. They can also assign SEQ sections to agency users for them to complete. Once the SEQ is completed, the agency POC reviews and
submits the SEQ. This user is primarily interested in the progress completion of the SEQ. The agency POC can do everything that an agency staff member can do, plus additional actions. Learn more about the actions available to this user here.

Agency Staff
An agency staff user logs into the system to complete the sections of SEQ assigned to him by agency POC. This user is interested in the progress completion of their sections. They are able to save their work on any in-progress sections, as well as rate and complete the sections once they are finished. This user may be working on more than one section at a time. Learn more about the actions available to this user here.

Review Team Lead
A review team lead user logs into the system when an SEQ is assigned to them by the CSBS internal staff for review. They are responsible for getting the review completed and for providing ratings and comments as they see appropriate, based on the responses to the questions in each section and topic. This user can also assign the sections of an SEQ to their team for review. They are interested in the progress of the review completion. Once all the sections are reviewed the review team lead is responsible for final review, and for any recommendations, suggestions or accolades given to the agency. They are interested in the summary of scores for a given SEQ at any time. The review team lead can do everything that a review team member can do, plus additional actions. Learn more about the actions available to this user here.

Review Team Member
A review team member user logs into the system to review the sections of the SEQ assigned to him. They are interested in the progress completion of their sections. This user is interested in the review comments of other users on the sections assigned to them. They are responsible for giving ratings and comments to each section being reviewed by them. Learn more about the actions available to this user here.

Audit Team Member
An audit team member user logs into the system to assess the summary of the review completed by review team. They will have specific audit tasks assigned to them, based upon which SEQs they are participating in. Learn more about the actions available to this user here.

Facilitator
A facilitator user logs into the system to provide comments on SEQs that they are participating in. They can view all data and download all documents associated with a review. They can also provide recommendations, suggestions, and accolades to the agencies. This user has limited visibility privileges within the system, and they can view SEQ scores for the reviews that they are assigned to. Learn more about the actions available to this user here.
AOS System Login

1. Navigate to https://csbs.appiancloud.com/
2. Select ‘Okta’.

3. After you are re-directed to the Okta login page, enter your credentials and click ‘Sign In’. If you have forgotten your password, click ‘Need help signing in?’ to reset. Proceed to step 6.

4. If you are not automatically re-directed to the AOS site, use your browser to navigate to https://csbs.appiancloud.com/suite/sites/accreditation-online-system

CSBS Accreditation Staff User

Home Page

The sections of the home page are described in more detail below.
Resources
For your convenience, resources for both review team members and agency staff are linked on the dashboard for quick reference and access. To read about how to manage these resources, click [here](#).

### Agency Resources

- **User Guides**
  - SEQ Instructions

- **Templates**
  - SEQ - Bank Mortgage Credit Union v 1 4 - offline 092319

- **Instructions**
  - SEQ Introduction Text

### Review Team Resources

- **User Guides**
  - Team Review Guide

- **Templates**
  - SEQ Template

- **Demo**
  - Team Review Guide
Announcements
All active announcements in the system are shown at the top of the home page. They are each designated as either targeted to the review team users, or targeted to the agency staff users. To read about how to manage these announcements, click here.

Administrative Actions
All administrative actions available to the CSBS internal staff users are available on the home page.

**Manage AOS Users**
1. Click the ‘Create or Update AOS Users’ action.
2. This action directs you to a view of all AOS users, with the ability to create new users or update/delete existing users.

3. To create a new user, select ‘Create User’ in the top right of the above screen. Then enter a valid email address for the new user, and select ‘Continue’.
4. Fill in values for all applicable fields, and click ‘Submit’

5. To search for a specific user, enter their first or last name into the search bar above the grid and then click ‘Search’.

6. To filter by role, click ‘+ Show Filters’ and then after the filter section expands, select a value (or values) from the dropdown, and click ‘Search’.
7. To update an existing user, click the pencil icon in the corresponding row.

8. Make any necessary updates to the chosen user and then click ‘Submit’.

9. To deactivate an existing user, click the red X icon in the corresponding row, and then click ‘Submit’ on the confirmation page that appears.
Manage NASCUS Agencies

1. Click the ‘Create or Update NASCUS Agency’ action.

2. This action directs you to a view of all NASCUS-only agencies, with the ability to create new ones or update/delete existing ones.

3. To create a new one, select ‘Create NASCUS Agency’ in the top right of the above screen. Then fill in values for all applicable fields, and click ‘Submit’
4. To update an existing agency, click the pencil icon in the corresponding row.

5. Make any necessary updates to the chosen agency and then click ‘Submit’.

6. To deactivate an existing NASCUS agency, click the red X icon in the corresponding row, and then click ‘Submit’ on the confirmation page that appears.

Manage Agency Accreditation Data

1. Click the ‘Manage Agency Accreditation Data’ action.
2. This action directs you to a view of all current accreditation data for the agencies and their corresponding accreditation types, with the ability to create entries or update/delete existing ones.

3. To create a new user, select ‘Create Accreditation Entry’ in the top right of the above screen. Then fill in values for all applicable fields, and click ‘Submit’.
4. To search for a specific entry, enter part of the agency’s name into the search bar above the grid and then click ‘Search’.

5. To update an existing entry, click the pencil icon in the corresponding row.

6. Make any necessary updates to the chosen entry and then click ‘Submit’.

7. To delete an existing entry, click the red X icon in the corresponding row.
Share Resource Documents

1. Click the ‘Share Resource Documents’ action.
2. This action directs you to a view of all current resource documents for both the review team and the agency users, with the ability to manage the resource categories or manage the resources themselves.

3. To manage the resource categories, select ‘Update Categories’ in the top right of the above screen. This directs you to a view of all current resource categories.

4. To add a new category, click ‘Add New Category’ under the grid. Then fill in values for all applicable fields, and click ‘Add Category’.
5. To update an existing category, click ‘Edit’ in the corresponding row.

6. Make any necessary updates to the chosen category and then click ‘Edit Category’.

7. To delete an existing category, click ‘Delete’ in the corresponding row and then click ‘Yes’ on the confirmation popup.
8. To navigate back to the management of resource documents, click ‘Close’.

9. To add a new resource document, click ‘Upload New Resource’ under the correct grid. One grid allows you to manage the review team resources and the other grid allows you to manage the agency resources. Then fill in values for all applicable fields, and click ‘Add Resource.’
10. To update an existing resource, click on ‘Edit’ in the corresponding row.

11. Make any necessary updates to the chosen resource and then click ‘Update Resource’.
12. To delete an existing resource, click ‘Delete’ in the corresponding row and then click ‘Yes’ on the confirmation popup.

Add Announcements

1. Click the ‘Add Announcements’ action.
2. This action directs you to a view of all current system announcements for both the review team and the agency users, with the ability to manage the announcements.

3. To add a new announcement, click ‘Add New Announcement’ under the correct grid. One grid allows you to manage the review team announcements and the other grid allows you to manage the agency announcements. Then fill in values for all applicable fields, and click ‘Add Announcement’.
4. To update an existing announcement, click on ‘Edit’ in the corresponding row.

5. Make any necessary updates to the chosen announcement and then click ‘Update Announcement.’
6. To delete an existing announcement, click ‘Delete’ in the corresponding row and then click ‘Yes’ on the confirmation popup.

Scheduling Page
This page allows users to view all of the details about 5-year accreditation reviews for the agencies present in the system. They are sorted by due date with the earliest date at the top of the listing. This tab also allows users to schedule reviews for each agency.
Search and Filter

1. To search for a specific scheduled accreditation review, enter part or all of the agency name into the search bar above the grid and then click ‘Search’.

2. To filter by due date year or accreditation date, click ‘+ Show Filters’ and then after the filter section expands, enter values into the fields as appropriate, and click ‘Search’.

Initiate Scheduled Review

1. To schedule a review and begin the 5-year accreditation process, click the calendar icon in the row corresponding to the agency that is being scheduled for review.
2. Fill in values for all applicable fields in the Review Details section, and click 'Submit'.

3. The record will be updated and the new accreditation type(s) will be added to the grid.
2. Update values for all applicable fields in the Review Details section, and click ‘Submit’.

3. The record will be updated and the changes will be reflected in the grid.

Update Review Team

1. To update the team for a scheduled review, click the pencil icon in the corresponding row.

2. Add all users who will be in the team for this specific 5-year accreditation review and then click ‘+ Add Users to Team’.
3. Designate the role for each team member and if they are a reviewer indicate whether or not they are the review team lead, then click ‘Submit’.

Note: Team members can only be assigned team roles that correspond with the roles that they have been designated within the AOS system. Learn how to change those roles [here](#).

Add Additional Scheduled Review

1. To add a scheduled review to an agency that already has an upcoming scheduled review, click the pencil icon in the corresponding row.
2. Click ‘Add Additional Review’ and then click ‘Yes’ on the confirmation popup.

3. Fill in values for all applicable fields in the Review Details and Team Assignments sections, then click ‘Submit’.

**Note:** Since there is another open concurrent review that has been scheduled for the same agency, any accreditation types already selected will be disabled for this additional review.

**Note:** Team members can only be assigned team roles that correspond with the roles that they have been designated within the AOS system. Learn how to change those roles [here](#).
4. The record will be updated and the new accreditation type(s) will be added to the grid

Delete Review

1. To delete a scheduled review, click the pencil icon in the corresponding row.

2. Click ‘Delete Review’ and then click ‘Yes’ on the confirmation popup.
Open Review Records

The main informative and transactional section of the home page is the grid of all open review records. This listing references each 5-year accreditation SEQ that has been scheduled but not yet completed. There are various actions that are available for each record, based upon its status. Clicking on the organization name will direct you to the record for that specific accreditation review, from which there are many actions available and scores/ratings can be viewed.

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Accreditation Type</th>
<th>Status</th>
<th>Onsite Review Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabene State Banking Dept</td>
<td>Mtg</td>
<td>Report Submitted</td>
<td>9/4/2019</td>
</tr>
<tr>
<td>District of Columbia Department of Insurance Securities and Banking</td>
<td>Bk</td>
<td>Sent to Agency</td>
<td>9/4/2019</td>
</tr>
<tr>
<td>Alabama State Banking Dept</td>
<td>MSB</td>
<td>Report Submitted</td>
<td>9/12/2019</td>
</tr>
<tr>
<td>Maine Bureau of Financial Institutions</td>
<td>Mtg, CU</td>
<td>Scheduling</td>
<td>9/25/2019</td>
</tr>
<tr>
<td>Alaska Division of Banking and Securities</td>
<td>Bk, Mtg, CU</td>
<td>Pending Agency Submission</td>
<td>9/28/2019</td>
</tr>
<tr>
<td>Florida Office of Financial Regulation</td>
<td>Bk, Mtg</td>
<td>Pending Agency Submission</td>
<td>9/30/2019</td>
</tr>
<tr>
<td>New Jersey Department of Banking and Insurance</td>
<td>Bk, Mtg</td>
<td>Pending Agency Submission</td>
<td>10/2/2019</td>
</tr>
<tr>
<td>Alabama State Banking Dept</td>
<td>Bk</td>
<td>Report Submitted</td>
<td>10/31/2019</td>
</tr>
<tr>
<td>North Carolina Office of Commissioner of Banks</td>
<td>Bk, Mtg, CU, MSB</td>
<td>Pending Agency Submission</td>
<td>11/28/2019</td>
</tr>
<tr>
<td>Texas Department of Banking</td>
<td>MSB</td>
<td>Submitted by Agency</td>
<td>12/25/2019</td>
</tr>
<tr>
<td>Colorado Division of Banking</td>
<td>Bk, Mtg</td>
<td>Audit Complete</td>
<td>12/25/2019</td>
</tr>
<tr>
<td>Colorado Division of Banking</td>
<td>CU</td>
<td>Sent to Agency</td>
<td>12/25/2019</td>
</tr>
<tr>
<td>Colorado Division of Banking</td>
<td>MSB</td>
<td>Under Review</td>
<td>1/1/2020</td>
</tr>
<tr>
<td>North Dakota Department of Financial Institutions</td>
<td>MSB</td>
<td>Pending Agency Submission</td>
<td>4/10/2020</td>
</tr>
<tr>
<td>Minnesota Department of Commerce</td>
<td>Bk, Mtg, CU, MSB</td>
<td>Pending Agency Submission</td>
<td>9/30/2024</td>
</tr>
</tbody>
</table>

Send SEQ to Agency

1. To send a scheduled SEQ to an agency (which will initiate the process of the agency users fulling out the SEQ) click the envelope icon in the corresponding row of any review which is in the ‘Scheduling’ status.
2. Click ‘Submit’ on the primary confirmation page.

3. Click ‘Close’ on the secondary confirmation page.

Five-Year SEQ Review Record
1. To navigate to a 5-year SEQ Review Record for an agency, click the blue ‘Organization Name’ link in the corresponding row. From this page you can perform all of the actions required to move an accreditation review through the process, as well as view all responses, comments, ratings, and scores for that particular review.
Update Review Record

1. By clicking the blue pencil icon the user can update a scheduled review, update the review team assignments, add an additional review, or delete the review.

Individual Review Record

This view of one specific 5-year accreditation review allows users to view and print the SEQ responses that the agency users have entered. This record also contains the agency ratings and review team scores, as well as any associated documents for the SEQ. Finally, the actions associated with advancing the process of the SEQ toward completion are found here.
View and Print SEQ Responses

1. To print the questions and responses for any given section of the SEQ, click the printer icon on the corresponding row. You can perform this action whether or not the agency has responded to any of the questions or completed any of the topics.

2. Once you are looking at the read-only version of the section, use the print feature on your browser to print out the entire contents of the page. If you want to view and/or print information from the agency’s Profile online system, click ‘+ Show Profile Information’. This will open a section and display any relevant data, as well as a link to open the Profile page itself in another browser tab. Not all agencies will have Profile data to display in this section.
View and Download SEQ Exhibits

1. To view and download all of the documents associated with an accreditation SEQ record, click ‘Exhibits’ once the review is in the Submitted by Agency status, or at any point after that status.

2. Any document added by the agency users or by the CSBS internal staff is available for download by clicking on the document name. The topics that each document is associated with are shown in the corresponding rows (for SEQ documents only).
Return SEQ to Agency

1. If a SEQ record has been submitted by the agency, but the review for the SEQ has not yet begun, a user may send it back to the agency if needed. Click ‘Return SEQ to Agency’.

   Note: This action can also be completed by selecting the Related Actions tab underneath the agency name header.

   2. Enter the reason for the return and then click ‘Submit’.
3. Click ‘Close’ on the confirmation page.

Start SEQ Review

1. After the SEQ has been submitted by the agency, review can begin. Click ‘Start Review’.
Note: This action can also be completed by selecting the Related Actions tab underneath the agency name header.

2. Click ‘Submit’ on the confirmation page.

3. Click ‘Close’ on the confirmation page.

Assign SEQ Review Sections

1. To assign review team members to specific sections in the submitted SEQ, click ‘Assign Sections’.

Note: This action can also be completed by selecting the Related Actions tab underneath the agency name header.
2. In order to assign a review team member to a section of the SEQ, select the user under the heading for the specific section by typing their name and then choosing the correct user. You may only choose from users who have been designated as part of the team for this review. You may update the team members for this specific review by managing the review at a higher level.

![Assign SEQ Sections](image)

**Note**: Assigning review team members to sections is optional, and is also only a suggestion. The user selected does not have to perform that review, and additionally, review team members can perform reviews on sections that they are not specifically assigned to.

3. Once all assignments have been made, click ‘Submit’.

![Assign SEQ Sections](image)

**Provide Review Comments**

1. To view the responses for individual SEQ topics and provide comments, first click the sideways blue arrow next to the section that you are interested in.
2. Then click on the blue icon in the row for the topic that you want to view and comment on.

3. After viewing the questions and responses, and the associated documents, navigate to the bottom and click ‘Add Comment’ below the grid in the Individual Review & Comments section.
4. Add your comment text and then click ‘Add’.

5. You may edit or delete your comments after they have been added.
6. Once all comments are added as necessary, click ‘Submit’. Comments are not required.

Note: CSBS staff can also edit or delete any comments added by the review team.

Finalize Review

1. Move the review forward after individual comments and ratings have been added, click ‘Finalize Review’.
Note: This action can also be completed by selecting the Related Actions tab underneath the agency name header.

2. Click ‘Submit’ on the confirmation page.

3. Click ‘Close’ on the confirmation page.

View and Print Calculated Scoresheet

1. To view the agency score and team score as compared to the passing score and maximum score for each accreditation type in an SEQ review, click ‘Scoresheet’ underneath the agency name header.
2. This will direct you to a topic-by-topic level listing on the team and agency ratings, and the calculated corresponding scores. At the top there is a summary for each accreditation type with the summed scores and their comparison to the passing and total scores, as appropriate.

3. If this SEQ review has more than one associated accreditation type, you can switch between viewing score summaries for the different types by clicking on any of the grey colored boxes at the top of the page. For instance, clicking anywhere within the area outlined in red below will switch the view to show only MSB ratings and scores for this SEQ review.

4. In order to view a printable version of all ratings and scores for all accreditation types (if more than one is applicable), click ‘View All Scores’.
5. You can now use your browser’s print function to print a copy of all relevant data for this SEQ review. When you are finished printing you can return to the summary scoresheet page by clicking ‘Selection View’.

Provide Recommendations/Suggestions/Accolades

1. To view the findings for a SEQ review, click ‘Findings’ underneath the agency name header.

2. In order to add or update recommendations related to this accreditation SEQ, click ‘Manage Recommendations’.
3. All of the topics with a rating of 1 or 0 are displayed in a grid at the top of the page, along with the corresponding accreditation type, and any comments. You can navigate through this list by clicking the arrows below it.

4. To add a new recommendation, click ‘Add Recommendation’.

5. Choose a topic for this recommendation to relate to, and then choose the corresponding accreditation type and enter the text of your recommendation. Once you have filled in all the fields, click ‘Add’.

6. You can edit or delete an existing recommendation by selecting either action in the corresponding row of a previously-added recommendation.
7. Once all recommendations have been added, click ‘Done’ to go back to the view of all findings.

8. In order to add or update suggestions related to this accreditation SEQ, click ‘Manage Suggestions’.

9. To add a new suggestion, click ‘Add Suggestion’.

10. Choose a topic for this suggestion to relate to, and then choose the corresponding accreditation type and enter the text of your suggestion. Once you have filled in all the fields, click ‘Add’.
**Note:** For suggestions, only topics that have received a team rating of '2' will be available to be selected.

11. You can edit or delete an existing suggestion by selecting either action in the corresponding row of a previously-added suggestion.

12. Once all suggestions have been added, click ‘Done’ to go back to the view of all findings.

13. In order to add or update accolades related to this accreditation SEQ, click ‘Manage Accolades’.
14. All of the topics with a rating of 3 are displayed in a grid at the top of the page, along with the corresponding accreditation type, and any comments. You can navigate through this list by clicking the arrows below it.

15. To add a new accolade, click ‘Add Accolade’.

16. Choose a topic for this accolade to relate to, and then choose the corresponding accreditation type and enter the text of your accolade. Once you have filled in all the fields, click ‘Add’.

17. You can edit or delete an existing accolade by selecting either action in the corresponding row of a previously-added accolade.
18. Once all accolades have been added, click ‘Done’ to go back to the view of all findings.

Manage Review Documents

1. To add documents that will only be seen by the review team of an individual accreditation SEQ, click ‘Exhibits’.

2. Then click ‘Review Team Documents’.
3. To add a new document, click ‘Upload New Document’ below the grid.

4. Upload a document from your computer, and optionally provide a description. Then click ‘Add Document’.

5. You can edit or delete any previously-added review document by clicking on either action in the corresponding row.

6. Once you have finished adding all documents for the review team, click ‘Close’.
7. These documents will be available for viewing by the review team and CSBS staff in the ‘Exhibits’ tab for the individual review. Agency users will not be able to view any of the review team documents.

Generate Review Report

1. To generate a DOCX version of the review report document for an accreditation SEQ, click ‘Related Actions’.
2. Then click ‘Generate Review Report’.

3. Click ‘Close’ on the confirmation page.

4. Wait for the document to be emailed to you from sender ‘AOS Generate Review Document’.

Submit Review Report for Audit

1. To submit the review report for audit, click ‘Submit Review’ while the review record is in the finalize review status, after all reviews and findings have been added.
**Note:** This action can also be completed by selecting the Related Actions tab underneath the agency name header.

2. The audit team members for the specific accreditation SEQ are shown. After uploading the review report document in PDF form (learn how to generate that document [here](#)) click ‘Submit’.

3. Click ‘Close’ on the confirmation page.

Reassign Audit Tasks

1. To reassign the audit tasks for a submitted accreditation review, click ‘Audit Review’.
2. Here you can download the review report document, view the members of both the review team and the audit team, view any existing notes from audit tasks that have already been completed, and view a list of outstanding audit tasks for this accreditation review record. If you want to reassign one of the audit tasks, click the blue arrow icon in the row corresponding to the task you want to reassign.

3. Choose a new assignee for this audit task. The user chosen must have the role of Auditor within the AOS system. Learn how to change those roles [here](#). Once you have selected the correct user, click ‘Reassign Task’.
4. This new user will be added to the audit team for this accreditation review and they will now have a task in the listing at the bottom.

**Upload Report and Close Review**

1. To upload the final report after any changes have been made after audit, click ‘Upload Report & Close Review’ while the review record is in the Audit Complete status.

**Note:** This action can also be completed by selecting the **Related Actions** tab underneath the agency name header.

2. Confirm that you have made all necessary updates and changes based off of the audit results, then upload the final report document(s) in PDF format. Once finished uploading, click ‘Continue’.

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3. You can make any necessary edits to the uploaded files, or add a new file as part of the final document package.

4. Once the documents are all correct, select one document as the final report for each different accreditation type. You may use the same document for multiple different types, or you may have one document uploaded per type.

5. Finally, update the accreditation status from ‘In-Progress’ to the appropriate new status for each type, and enter an accreditation date for each type. Then click ‘Submit’.
6. Click ‘Close’ on the confirmation page.

Records Page
This page allows users to view all of the details about individual 5-year accreditation reviews for the agencies present in the system – past and present. This tab shows both active and past records, and it is a running list of all SEQ reviews created within the system.

Search and Filter
1. To search for a specific accreditation review, enter part or all of the agency name into the search bar above the grid and then click ‘Search’.
2. To filter by review date or review status, click ‘+ Show Filters’ at the top and then after the filter section expands, enter values into the fields as appropriate, and click ‘Search’.

3. After locating the correct record, clicking on the name of the organization will direct the user to the individual record for that specific accreditation review.

Reports Page
This page allows users to view aggregate data about accreditation reviews that are in the system. There are multiple different types of reports available, which are all designed to roll up the data in different meaningful ways.
Aggregate Scores Report

1. To view total scores for all agencies whose review has been completed, click the blue ‘Aggregate Scores Report’ link.

2. To search for a specific score set, enter part or all of the agency name into the search bar above the grid and then click ‘Search’.

3. To filter by on-site date or accreditation type, first click ‘+ Show Filters’ at the top and then after the filter section expands, enter values into the fields as appropriate, and click ‘Search’.

4. To hide columns that aren’t relevant, or restore columns that were previously hidden, first click ‘+ Show Columns’ below the grid and then after the column selection dropdown appears, select and de-select columns as needed, and the changes will be effective immediately in the grid.
Note: Even if no columns are selected in the dropdown, the Agency Name, Type of Review, and magnifying glass columns will still appear as default.

5. After locating the correct record, clicking on blue magnifying glass icon will direct the user to the section-by-section scores for that specific accreditation review.

6. To hide columns that aren’t relevant, or restore columns that were previously hidden, first click ‘+ Show Columns’ below the grid and then after the column selection dropdown appears, select and de-select columns as needed, and the changes will be effective immediately in the grid.

Note: Even if no columns are selected in the dropdown, the Section columns will still appear as default.

7. To navigate back to the aggregate scores for all completed accreditations reviews, click ‘Aggregate Scores’. At any time you can navigate back to the listing of report types by clicking the ‘Reports’ at the very top of the page.
Review Comments Report

1. To view an aggregation of the comments for each accreditation review, click on ‘Review Comments’.

2. To search for a specific comment set, enter part or all of the agency name into the search bar above the grid and then click ‘Search’.

3. To filter by review date or review status, first click ‘+ Show Filters’ at the top and then after the filter section expands, enter values into the fields as appropriate, and click ‘Search’.

4. After locating the correct record, clicking on organization name will direct the user to the topic-by-topic comments for that specific accreditation review.
5. To hide columns that aren’t relevant, or restore columns that were previously hidden, first click ‘+ Show Columns’ below the grid and then after the column selection dropdown appears, select and de-select columns as needed, and the changes will be effective immediately in the grid.

**Note:** Even if no columns are selected in the dropdown, the Topic Name column will still appear as default.

6. To filter by section, topic, or commenter, first click ‘+ Show Filters’ at the top and then after the filter section expands, enter values into the fields as appropriate, and click ‘Search’.

7. After locating the correct topic and comment, clicking on topic name will direct the user to a view-only version of the questions and answers for that topic, as well as all of the associated comments.
8. To navigate back to topic-by-topic comments for the originally selected accreditation review, click ‘Review Comments’.

9. To view all of the individual and team ratings for the topics that have been commented upon, click on the magnifying glass icon in the corresponding row.

10. Once you are finished viewing the ratings, click ‘Review Comments’ to navigate back to topic-by-topic comments for the originally selected accreditation review. At any time you can navigate back to the listing of report types by clicking the ‘Reports’ at the very top of the page.
Review Team Member

Home Page

The sections of the home page are described in more detail below.

Resources

For your convenience, resources for review team members are linked on the dashboard for quick reference and access.
Announcements

All active announcements in the system are shown at the top of the home page. They are targeted to the review team users specifically.

Open Review Records

The main informative and transactional section of the home page is the grid of all open review records. This listing references each 5-year accreditation SEQ that has been scheduled but not yet completed. Clicking on the organization name will direct you to the record for that specific accreditation review, from which there are many actions available and scores/ratings can be viewed. You can only see records for which you have been added to the review team by a CSBS internal staff member.

Individual Review Record

This view of one specific 5-year accreditation review allows users to view and print the SEQ responses that the agency users have entered. This record also contains the agency ratings and review team scores, as well
as any associated documents for the SEQ. Finally, the actions associated with advancing the process of the SEQ toward completion are found here.

View and Print SEQ Responses

1. To print the questions and responses for any given section of the SEQ, click the printer icon on the corresponding row. You can perform this action whether or not the agency has responded to any of the questions or completed any of the topics.

2. Once you are looking at the read-only version of the section, use the print feature on your browser to print out the entire contents of the page. If you want to view and/or print information from the agency’s Profile online system, click ‘+ Show Profile Information’. This will open a section and display any relevant data, as well as a link to open the Profile page itself in another browser tab. Not all agencies will have Profile data to display in this section.
View and Download SEQ Exhibits

1. To view and download all of the documents associated with an accreditation SEQ record, click ‘Exhibits’ once the review is in the Submitted by Agency status, or at any point after that status.

2. Any document added by the agency users or by the CSBS internal staff is available for download by clicking on the document name. The topics that each document is associated with are shown in the corresponding rows (for SEQ documents only).
Assign SEQ Review Sections (Team Lead Only)

1. To assign review team members to specific sections in the submitted SEQ, click ‘Assign Sections’.

2. In order to assign a review team member to a section of the SEQ, select the user under the heading for the specific section by typing their name and then choosing the correct user. You may only choose from users who have been designated as part of the team for this review.

Note: This action can also be completed by selecting the Related Actions tab underneath the agency name header.
Note: Assigning review team members to sections is optional, and is also only a suggestion. The user selected does not have to perform that review, and additionally, review team members can perform reviews on sections that they are not specifically assigned to.

3. Once all assignments have been made, click ‘Submit’.

Provide Review Comments and Rating
1. To view the responses for individual SEQ topics and provide comments and rating(s), first click the sideways blue arrow next to the section that you are interested in.
2. Then click on the blue icon in the row for the topic that you want to view and comment on/rate.

3. After viewing the questions, responses and agency rating, as well as any associated documents, navigate to the bottom and select a rating value from the Rating field in the Individual Review & Comments section.

4. If you are rating a topic in section 1 or section 2 and this accreditation review applies for more than one accreditation type, you may choose to set different ratings per type. To do this, click ‘Set Separately’ and then choose unique values for each accreditation type.
5. If you want to add a comment to this topic, click ‘Add Comment’ below the grid in the Individual Review & Comments section.

6. Add your comment text and then click ‘Add’.

7. You may edit or delete your comments after they have been added.
Once all ratings and comments are added as necessary, click ‘Submit’. Comments are not required, but a rating is required for each accreditation type.

Review All Topics

1. To review all topics en masse after you have read the responses and made a rating decision, click ‘Review All Topics’.
Note: This action can also be completed by selecting the Related Actions tab underneath the agency name header.

2. Select ratings for all topics in Section 1 by choosing from the dropdown in the ‘Individual Rating’ column. If there is more than one accreditation type for this particular review, you can set the ratings separately per type by clicking ‘Set Separately’.

3. To save the ratings for the current section and return to the summary page for this SEQ, click ‘Save and Exit’ or to save the ratings for the current section and move on to rate the next section, click ‘Save and Continue’.
4. You can also navigate through the sections ad hoc by clicking on the blue section number at the top.

5. Clicking on the blue topic name will open a read-only view of the questions and responses for that topic in another tab, so that you can reference it while you make your ratings.

Finalize Review

1. Move the review forward after individual comments and ratings have been added, click ‘Finalize Review’.
Note: This action can also be completed by selecting the Related Actions tab underneath the agency name header.

2. Click ‘Submit’ on the confirmation page.

3. Click ‘Close’ on the confirmation page.

Team Review of SEQ Topics

1. To perform a team-level review of the accreditation SEQ, click ‘Team Review’ underneath the agency name header.
2. This will direct you to a topic-by-topic level listing on the team ratings for this SEQ review. To add or update the team level ratings and comments, click ‘Team Review’.

Note: This action can also be completed by selecting the Related Actions tab underneath the agency name header.

Note: This is the official team review action. To perform individual review, navigate to the Summary tab underneath the agency name header for the ‘Review All Tasks’ action.

3. Select ratings for all topics in Section 1 by choosing from the dropdown in the ‘Team Rating’ column. If there is more than one accreditation type for this particular review, you can set the ratings separately per type by clicking ‘Set Separately’. Add team comments as needed to supplement the ratings for each topic.

4. To save the ratings for the current section and return to the summary page for this SEQ, click ‘Save and Exit’ or to save the ratings for the current section and move on to rate the next section, click ‘Save and Continue’.
5. You can also navigate through the sections adhoc by clicking on the blue section number at the top.

6. Clicking on the blue topic name will open a read-only view of the questions and responses for that topic in another tab, so that you can reference it while you make your ratings.

View and Print Calculated Scoresheet

1. To view the agency score and team score as compared to the passing score and maximum score for each accreditation type in an SEQ review, click ‘Scoresheet’ underneath the agency name header.
2. This will direct you to a topic-by-topic level listing on the team and agency ratings, and the calculated corresponding scores. At the top there is a summary for each accreditation type with the summed scores and their comparison to the passing and total scores, as appropriate.

3. If this SEQ review has more than one associated accreditation type, you can switch between viewing score summaries for the different types by clicking on any of the grey colored boxes at the top of the page. For instance, clicking anywhere within the area outlined in red below will switch the view to show only MSB ratings and scores for this SEQ review.

4. In order to view a printable version of all ratings and scores for all accreditation types (if more than one is applicable), click ‘View All Scores’.
5. You can now use your browser’s print function to print a copy of all relevant data for this SEQ review. When you are finished printing you can return to the summary scoresheet page by clicking ‘Selection View’.

Provide Recommendations/Suggestions/Accolades
1. To view the findings for a SEQ review, click ‘Findings’ underneath the agency name header.
2. In order to add or update recommendations related to this accreditation SEQ, click ‘Manage Recommendations’.

3. All of the topics with a rating of 1 or 0 are displayed in a grid at the top of the page, along with the corresponding accreditation type, and any comments. You can navigate through this list by clicking the arrows below it.

4. To add a new recommendation, click ‘Add Recommendation’.

5. Choose a topic for this recommendation to relate to, and then choose the corresponding accreditation type and enter the text of your recommendation. Once you have filled in all the fields, click ‘Add’.
6. You can edit or delete an existing recommendation by selecting either action in the corresponding row of a previously-added recommendation.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Recommendation</th>
<th>Accreditation Type</th>
<th>Actions</th>
</tr>
</thead>
</table>

7. Once all recommendations have been added, click ‘Done’ to go back to the view of all findings.

8. In order to add or update suggestions related to this accreditation SEQ, click ‘Manage Suggestions’.

9. To add a new suggestion, click ‘Add Suggestion’.
10. Choose a topic for this suggestion to relate to, and then choose the corresponding accreditation type and enter the text of your suggestion. Once you have filled in all the fields, click ‘Add’.

**Note:** For suggestions, only topics that have received a team rating of ‘2’ will be available to be selected.

11. You can edit or delete an existing suggestion by selecting either action in the corresponding row of a previously-added suggestion.

12. Once all suggestions have been added, click ‘Done’ to go back to the view of all findings.
13. In order to add or update accolades related to this accreditation SEQ, click ‘Manage Accolades’.

14. All of the topics with a rating of 3 are displayed in a grid at the top of the page, along with the corresponding accreditation type, and any comments. You can navigate through this list by clicking the arrows below it.

15. To add a new accolade, click ‘Add Accolade’.

16. Choose a topic for this accolade to relate to, and then choose the corresponding accreditation type and enter the text of your accolade. Once you have filled in all the fields, click ‘Add’.
17. You can edit or delete an existing accolade by selecting either action in the corresponding row of a previously-added accolade.

18. Once all accolades have been added, click ‘Done’ to go back to the view of all findings.

Generate Review Report

1. To generate a PDF version of the review report document for an accreditation SEQ, click ‘Related Actions’.
2. Then click ‘Generate Review Report’.

3. Click ‘Close’ on the confirmation page.

4. Wait for the document to be emailed to you from sender ‘AOS Generate Review Document’.

Records Page
This page allows users to view all of the details about individual 5-year accreditation reviews for the agencies present in the system – past and present. This tab shows both active and past records, and it is a running list of all SEQ reviews that a review team member has been assigned. Review team members will not see any records they were not assigned.
Search and Filter

1. To search for a specific accreditation review, enter part or all of the agency name into the search bar above the grid and then click ‘Search’.

2. To filter by review date or review status, click ‘+ Show Filters’ at the top and then after the filter section expands, enter values into the fields as appropriate, and click ‘Search’.

3. After locating the correct record, clicking on the name of the organization will direct the user to the individual record for that specific accreditation review.
Reports Page
This page allows users to view aggregate data about accreditation reviews that are in the system. There are multiple different types of reports available, which are all designed to roll up the data in different meaningful ways.

Review Comments Report
1. To view an aggregation of the comments for each accreditation review, click on ‘Review Comments’.

2. To search for a specific comment set, enter part or all of the agency name into the search bar above the grid and then click ‘Search’.
3. To filter by review date or review status, first click ‘+ Show Filters’ at the top and then after the filter section expands, enter values into the fields as appropriate, and click ‘Search’.

4. After locating the correct record, clicking on organization name will direct the user to the topic-by-topic comments for that specific accreditation review.

5. To hide columns that aren’t relevant, or restore columns that were previously hidden, first click ‘+ Show Columns’ below the grid and then after the column selection dropdown appears, select and de-select columns as needed, and the changes will be effective immediately in the grid.

Note: Even if no columns are selected in the dropdown, the Topic Name column will still appear as default.

6. To filter by section, topic, or commenter, first click ‘+ Show Filters’ at the top and then after the filter section expands, enter values into the fields as appropriate, and click ‘Search’.
7. After locating the correct topic and comment, clicking on topic name will direct the user to a view-only version of the questions and answers for that topic, as well as all of the associated comments.

8. To navigate back to topic-by-topic comments for the originally selected accreditation review, click ‘Review Comments’.

9. To view all of the individual and team ratings for the topics that have been commented upon, click on the magnifying glass icon in the corresponding row.
10. Once you are finished viewing the ratings, click ‘Review Comments’ to navigate back to topic-by-topic comments for the originally selected accreditation review.

Agency Staff

Home Page
The sections of the home page are described in more detail below. Note that some sections will only appear to agency POC users and not to agency staff users. In order to view the agency’s Profile in a new browser tab, you can click ‘View Agency Profile’ at any time.
Resources
For your convenience, resources for all agencies (added by CSBS internal staff users) are linked on the dashboard for quick reference and access.

```
<table>
<thead>
<tr>
<th>Agency Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>• User Guides</td>
</tr>
<tr>
<td>▪ SEQ Instructions</td>
</tr>
<tr>
<td>▪ Accreditation Handbook for State Agencies - Final 10.2.19</td>
</tr>
<tr>
<td>• Templates</td>
</tr>
<tr>
<td>▪ SEQ - Bank Mortgage Credit Union v 1.4 - offline 09/3/19</td>
</tr>
<tr>
<td>• Instructions</td>
</tr>
<tr>
<td>▪ SEQ Introduction Text</td>
</tr>
<tr>
<td>• User Guide 1</td>
</tr>
<tr>
<td>▪ A testing Artifact2 - Copy (7)</td>
</tr>
</tbody>
</table>
```

Announcements
All active announcements for agencies in the system (added by CSBS internal staff users) are shown at the top of the home page.

```
<table>
<thead>
<tr>
<th>Announcements</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Announcement 2</td>
</tr>
<tr>
<td>• Welcome agency users!</td>
</tr>
</tbody>
</table>
```

Historical SEQ Records
All completed SEQs are available for viewing from a grid at the bottom of the home page. To navigate to a 5-year SEQ record for a specific accreditation type and a specific year, click the blue ‘Accreditation Type’ link in the corresponding row.

```
<table>
<thead>
<tr>
<th>Completed Records for My Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accreditation Type</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>No items available</td>
</tr>
</tbody>
</table>
```

Administrative Actions (POC Only)
The administrative action(s) available to the agency POC users are available on the home page.

```
<table>
<thead>
<tr>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>🪐 Create or Update AOS Users</td>
</tr>
<tr>
<td>🗂️ View Agency Profile</td>
</tr>
</tbody>
</table>
```
Manage AOS Users

1. Click the ‘Create or Update AOS Users’ action.

2. This action directs you to a view of all AOS users for the appropriate agency, with the ability to create new users or update/delete existing users.

3. To create a new user, select ‘Create User’ in the top right of the above screen. Then enter a valid email address for the new user, and select ‘Continue’.

4. Fill in values for all applicable fields, and click ‘Submit’.
5. To search for a specific user, enter their first or last name into the search bar above the grid and then click ‘Search’.

6. To filter by role, click ‘+ Show Filters’ and then after the filter section expands, select a value (or values) from the filter fields, and click ‘Search’.

7. To update an existing user, click the pencil icon in the corresponding row.
8. Make any necessary updates to the chosen user and then click ‘Submit’.

9. To deactivate an existing user, click the red X icon in the corresponding row, and then click ‘Submit’ on the confirmation page that appears.

Open SEQ Records
The main informative and transactional section of the home page is the grid of all open and active review records for the appropriate agency. This listing references each 5-year accreditation SEQ that has been scheduled but not yet completed. There are various actions that are available for each record, based upon its status. Clicking on the accreditation type will direct you to the record for that specific accreditation SEQ, from which there are many actions available and the SEQ itself can be filled out and completed.
Five-Year SEQ Record

1. To navigate to a 5-year SEQ Record for a specific accreditation type, click the blue ‘Accreditation Type’ link in the corresponding row. From this page you can fill out all questions in the SEQ and provide ratings and any associated documents.

Individual Five-Year SEQ Record

This view of one specific 5-year accreditation type allows users to view and print the SEQ responses that they have entered, as well as record responses to the questions in each section and topic. This record also contains the agency scoresheet after it has been submitted and reviewed, as well as any associated documents for the SEQ. Finally, the actions associated with advancing the process of the SEQ toward completion are found here.
View and Print SEQ Responses

1. To print the questions and responses for any given section of the SEQ, click the printer icon on the corresponding row. You can perform this action whether or not any agency user has responded to any of the questions or completed any of the topics.

2. Once you are looking at the read-only version of the section, use the print feature on your browser to print out the entire contents of the page. If you want to view and/or print information from the agency’s Profile online system, click ‘+ Show Profile Information’. This will open a section and display any relevant data, as well as a link to open the Profile page itself in another browser tab. Not all agencies will have Profile data to display in this section.

Assign SEQ Topics (POC Only)

1. To assign agency users to specific topics or sections in the SEQ, click ‘Assign SEQ Topics’.
Note: This action can also be completed by selecting the Related Actions tab underneath the agency name header.

2. In order to assign one user to an entire section of the SEQ, choose the user under the heading for the specific section. This will auto-fill the chosen user into all topics within that section.

3. In order to assign one user to a single topic, choose the user under the heading for the specific topic. You can perform this action whether or not the user was auto-filled from section-level assignment.
4. Once all assignments have been made, click ‘Submit’.

**Note:** Assignments are not required for each section/topic. And assigning a user to a section/topic is purely a suggestion, as they are not required to fill out the SEQ for their assignments.

**Complete SEQ Topics**

1. To fill out SEQ responses and complete a topic, first select the sideways arrow in the left-most column for the corresponding section, then select the pencil icon in the left-most column for the chosen topic.
2. Respond to all required questions (marked with an asterisk) for the topic.

3. Toward the bottom of the page, select a rating for each accreditation type, separately, if applicable, by clicking ‘Set Separately’. Or you may choose to set all types to the same rating by leaving the default ‘Set All’ selected.
4. To manage documents for this particular topic, select ‘Manage Documents’ below the ‘Topic Documents’ grid near the bottom of the page.

5. Select ‘Upload New Document’ below the grid.

6. Fill in all required fields. If you want to associate additional topics to this current document (to minimize redundant or duplicate document entries), select ‘+ Associate Additional Topics to Document’ and choose the additional topic(s) and then click ‘Close’ in that small section. Finally, select ‘Add Document’.

7. Once you are finished with edits to this topic, click ‘Save’ to save all responses without completing the topic. This action will navigate you back to the main landing page for this particular SEQ.
8. Once the topic has been completed and you wish to finish editing it and move on to the next topic, click ‘Complete’

9. After completing a topic, the overall progress bar will change to reflect the amount of the SEQ that has been completed, and the number of topics completed in that particular section will increase. Additionally, the status of the SEQ will change to ‘Pending Agency Submission’.

\textbf{Note:} You may still come back to edit a topic that has been completed.
Manage SEQ Documents

1. To edit or delete the documents for a particular SEQ, first click ‘Related Actions’.

2. Click ‘Manage SEQ Documents’ from the list of actions for this SEQ.

3. Select the section that corresponds with the document you wish to edit or delete.
4. To download any of the documents in the chosen section, click the blue document name link in the corresponding row of the grid.

5. To edit any of the documents in the chosen section, click the ‘Edit’ link in the corresponding row of the grid.
6. Update the fields and/or document uploaded as needed and then click ‘Update Document’.

7. To delete any of the documents in the chosen section, click the ‘Delete’ link in the corresponding row of the grid, and then click ‘Yes’ on the confirmation popup.

Submit SEQ *(POC Only)*

1. After completing all of the topics in all of the sections, the progress bar will show 100% completion. At this point, the user may click ‘Submit SEQ’.
Note: This action can also be completed by selecting the Related Actions tab underneath the agency name header.

2. Click ‘Submit’ on the confirmation page that appears. Only perform this action if you are completely finished with all final responses to the SEQ.

3. Click ‘Close’ on the submission confirmation page.

View and Print Calculated Scoresheet

1. To view the agency score as compared to the passing score and maximum score for each accreditation type in an SEQ review, click ‘Agency Scoresheet’ underneath the agency name header.
2. This will direct you to a topic-by-topic level listing of the agency ratings, and the calculated corresponding scores. At the top there is a summary for each accreditation type with the summed scores and their comparison to the passing and total scores, as appropriate.

3. If this SEQ review has more than one associated accreditation type, you can switch between viewing score summaries for the different types by clicking on any of the grey colored boxes at the top of the page. For instance, clicking anywhere within the area outlined in red below will switch the view to show only MSB ratings and scores for this SEQ review.

4. In order to view a printable version of all ratings and scores for all accreditation types (if more than one is applicable), click ‘View All Scores’.

5. You can now use your browser’s print function to print a copy of all relevant data for this SEQ review. When you are finished printing you can return to the summary scoresheet page by clicking ‘Selection View’.
Records Page

This page allows users to view all of the details about individual 5-year accreditation reviews for their agency – past and present. It is a running list of all SEQ reviews that have been performed or are in-progress for this agency.

Facilitator

Home Page

The main informative and transactional section of the home page is the grid of all open review records for an individual user. A user will only see review records for which they are a member of the review team, as specified by a member of the CSBS internal staff. There may be no open records, if the user is not currently in the reviewer role for any records. To learn more about the reviewer functionality, see here.
Records Page
This page allows users to view all of the details about individual 5-year accreditation reviews for the agencies present in the system – past and present. This tab shows both active and past records, and it is a running list of all SEQ reviews that you have been associated with in the system.

Search and Filter
1. To search for a specific accreditation review, enter part or all of the agency name into the search bar above the grid and then click ‘Search’.

2. To filter by review date or review status, click ‘+ Show Filters’ at the top and then after the filter section expands, enter values into the fields as appropriate, and click ‘Search’.

3. After locating the correct record, clicking on the name of the organization will direct the user to the individual record for that specific accreditation review.
Individual Review Record

This view of one specific 5-year accreditation review allows users to view and print the SEQ responses that the agency users have entered. This record also contains the agency ratings and review team scores, as well as any associated documents for the SEQ.

View and Print SEQ Responses

1. To print the questions and responses for any given section of the SEQ, click the printer icon on the corresponding row. You can perform this action whether or not the agency has responded to any of the questions or completed any of the topics.
2. Once you are looking at the read-only version of the section, use the print feature on your browser to print out the entire contents of the page. If you want to view and/or print information from the agency’s Profile online system, click ‘+ Show Profile Information’. This will open a section and display any relevant data, as well as a link to open the Profile page itself in another browser tab. Not all agencies will have Profile data to display in this section.

View and Download SEQ Exhibits

1. To view and download all of the documents associated with an accreditation SEQ record, click ‘Exhibits’ once the review is in the Submitted by Agency status, or at any point after that status.
2. Any document added by the agency users or by the CSBS internal staff is available for download by clicking on the document name. The topics that each document is associated with are shown in the corresponding rows (for SEQ documents only).

Provide Review Comments

1. To view the responses for individual SEQ topics and provide comments, first click the sideways blue arrow next to the section that you are interested in.
2. Then click on the blue icon in the row for the topic that you want to view and comment on.

3. After viewing the questions and responses, and the associated documents, navigate to the bottom and click ‘Add Comment’ below the grid in the Individual Review & Comments section.
4. Add your comment text and then click ‘Add’.

5. You may edit or delete your comments after they have been added.
6. Once all comments are added as necessary, click ‘Submit’. Comments are not required.

Note: Facilitators can also edit or delete any comments added by the review team.

View and Print Calculated Scoresheet

1. To view the agency score and team score as compared to the passing score and maximum score for each accreditation type in an SEQ review, click ‘Scoresheet’ underneath the agency name header.
2. This will direct you to a topic-by-topic level listing on the team and agency ratings, and the calculated corresponding scores. At the top there is a summary for each accreditation type with the summed scores and their comparison to the passing and total scores, as appropriate.

3. If this SEQ review has more than one associated accreditation type, you can switch between viewing score summaries for the different types by clicking on any of the grey colored boxes at the top of the page. For instance, clicking anywhere within the area outlined in red below will switch the view to show only MSB ratings and scores for this SEQ review.

4. In order to view a printable version of all ratings and scores for all accreditation types (if more than one is applicable), click ‘View All Scores’.
5. You can now use your browser’s print function to print a copy of all relevant data for this SEQ review. When you are finished printing you can return to the summary scoresheet page by clicking ‘Selection View’.

Provide Recommendations/Suggestions/Accolades

1. To view the findings for a SEQ review, click ‘Findings’ underneath the agency name header.
2. In order to add or update recommendations related to this accreditation SEQ, click ‘Manage Recommendations’.

3. All of the topics with a rating of 1 or 0 are displayed in a grid at the top of the page, along with the corresponding accreditation type, and any comments. You can navigate through this list by clicking the arrows below it.

4. To add a new recommendation, click ‘Add Recommendation’.

5. Choose a topic for this recommendation to relate to, and then choose the corresponding accreditation type and enter the text of your recommendation. Once you have filled in all the fields, click ‘Add’.
6. You can edit or delete an existing recommendation by selecting either action in the corresponding row of a previously-added recommendation.

7. Once all recommendations have been added, click ‘Done’ to go back to the view of all findings.

8. In order to add or update suggestions related to this accreditation SEQ, click ‘Manage Suggestions’.

9. To add a new suggestion, click ‘Add Suggestion’.
10. Choose a topic for this suggestion to relate to, and then choose the corresponding accreditation type and enter the text of your suggestion. Once you have filled in all the fields, click ‘Add’.

**Note:** For suggestions, only topics that have received a team rating of ‘2’ will be available to be selected.

11. You can edit or delete an existing suggestion by selecting either action in the corresponding row of a previously-added suggestion.

12. Once all suggestions have been added, click ‘Done’ to go back to the view of all findings.
13. In order to add or update accolades related to this accreditation SEQ, click ‘Manage Accolades’.

14. All of the topics with a rating of 3 are displayed in a grid at the top of the page, along with the corresponding accreditation type, and any comments. You can navigate through this list by clicking the arrows below it.

15. To add a new accolade, click ‘Add Accolade’.

16. Choose a topic for this accolade to relate to, and then choose the corresponding accreditation type and enter the text of your accolade. Once you have filled in all the fields, click ‘Add’.
17. You can edit or delete an existing accolade by selecting either action in the corresponding row of a previously-added accolade.

18. Once all accolades have been added, click ‘Done’ to go back to the view of all findings.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Accolade</th>
<th>Accreditation Type</th>
<th>Actions</th>
</tr>
</thead>
</table>
| B.C.1, Scope of Examination Capabilities: Ability to Examine 50% of its Credit Unions Annually | Eget magna fermentum luctu eu non diam phasellus vestibulum. Ac consectetur lorem donec massa sapien faucibus et. Conseque id vel pretium lectus quam id leo in. Ordin dupibus uterices in arcu nunc sed augue. Massa id velit eu aliquam vestibulum. Ac tortor vitae purus faucibus ornare suspendisse sed nisi. Semper auctor neque vitae tempus quam. Venenitates lectus magna fringilla una porttitor rhoncus. Tristique sed consectetur et netus et malesuada fames ac turpis. Purus faucibus ornare suspendisse sed nisi. Eget nulla facilisi et dignissim diam quis enim lobortis. Suspen

Manage Review Documents

1. To add documents that will only be seen by the review team of an individual accreditation SEQ, click ‘Exhibits’.
2. Then click ‘Review Team Documents’.

3. To add a new document, click ‘Upload New Document’ below the grid.

4. Upload a document from your computer, and optionally provide a description. Then click ‘Add Document’.

5. You can edit or delete any previously-added review document by clicking on either action in the corresponding row.
6. Once you have finished adding all documents for the review team, click ‘Close’.

7. These documents will be available for viewing by the review team and CSBS staff in the ‘Exhibits’ tab for the individual review. Agency users will not be able to view any of the review team documents.
Generate Review Report

1. To generate a DOCX version of the review report document for an accreditation SEQ, click ‘Related Actions’.

2. Then click ‘Generate Review Report’.

3. Click ‘Close’ on the confirmation page.
4. Wait for the document to be emailed to you from sender ‘AOS Generate Review Document’.

Audit Team Member

Home Page
The main informative and transactional section of the home page is the grid of all active audit tasks for an individual user. This listing references any outstanding tasks for accreditation review records that have been submitted for audit. A user will only see audit tasks for records for which they are a member of the audit team, as specified by a member of the CSBS internal staff. If you have no outstanding audit tasks, then the ‘Audit Tasks’ section will not appear, as seen below.

Performing an Audit
1. Once an audit task appears, clicking on blue ‘Review Audit’ link from the Audit Tasks grid will direct you to the audit task for that individual review record, which includes the report document.
2. From this task you can download the report document by clicking on the blue link.

![Report Submission](image)

3. After you have reviewed the document, make any comments necessary in the comment field and then either click ‘Save’ (to return to the task at a later date and preserve all of the comments that you have previously entered) or ‘Submit’ (to send your comments to the review team for this accreditation review and complete the task, thus removing it from your home page task listing).

![Report Submission](image)

4. If you chose Submit, click ‘Yes’ on the confirmation popup.

![Report Submission](image)

**Records Page**

This page allows users to view all of the details about individual 5-year accreditation reviews for the agencies present in the system – past and present. This tab shows both active and past records, and it is a running list of all SEQ reviews that you have been an audit team member of. You will not see any records that you were not on the audit team for.
Search and Filter

1. To search for a specific accreditation review, enter part or all of the agency name into the search bar above the grid and then click ‘Search’.

2. To filter by review date or review status, click ‘+ Show Filters’ at the top and then after the filter section expands, enter values into the fields as appropriate, and click ‘Search’.
Help Page

This page allows users to view resources that have been placed into the system as tutorials or guides. There are multiple different types of resources available, and they can be sorted and filtered. They are sorted by the date they were last modified with the most recent at the top, but can be sorted by any of the other columns.

Search and Filter

1. To search or use filters to find a specific help resource, click ‘Filters’.

2. The filter fields can be used in any combination, and you do not have to fill in values for all of them in order to perform a search. Once you have set the filters as needed, click ‘Search’.

3. To hide columns that aren’t relevant, or restore columns that were previously hidden, first click ‘+ Show Columns’ below the grid and then after the column selection checkboxes appear, select and de-select columns as needed, and the changes will be effective immediately in the grid.
**Help Resources**

<table>
<thead>
<tr>
<th>Filters</th>
<th>Name</th>
<th>Type</th>
<th>Category</th>
<th>Sub-Category</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Help</td>
<td>Profile</td>
<td>Reports</td>
<td>Survey</td>
<td>summary of the help resource</td>
<td></td>
</tr>
<tr>
<td>Test Help Resource for Profile</td>
<td>Profile</td>
<td>General</td>
<td></td>
<td>This is a document that will assist a user to xyz</td>
<td></td>
</tr>
<tr>
<td>Completing sections</td>
<td>Profile</td>
<td>State Agencies</td>
<td>Sections, Topics, and Attestation</td>
<td>Details on completing sections for the SBA profiles</td>
<td></td>
</tr>
<tr>
<td>Topic Navigation</td>
<td>Profile</td>
<td>State Agencies</td>
<td>Topics</td>
<td>Information on how to navigate through topics</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Even if no columns are selected in the dropdown, the Name column will still appear as default.

4. After locating the correct resource, clicking on its name will direct the user to more details about that specific resource.

**Individual Help Resource**

1. By navigating to this individual resource, you can view all of the details associated with it, as well as any related files, links, or comments.
2. Within the details section at the top, you can rate the quality of this resource by clicking ‘Rate this Resource’.

3. The field will change into a selectable row of stars and you can select the star that reflects your rating of the resource. More stars is a higher value and a better rating.

4. After selecting a star, click ‘Submit Rating’.

5. Another possible action from this resource is downloading or viewing any videos associated with it. You can download the file by clicking on its name, or view it by clicking ‘View Video’ in the corresponding row.

Note: The ‘View Video’ option will only be available if the file is in video format. All non-video files will only have the option to download.

6. If there are any links associated with the resource, you can navigate to them by clicking their value under the Link column in the ‘Links’ section.

7. You can view and add comments about this resource by clicking ‘Comments’ at the top and then clicking ‘+ Add New’ below the grid.
8. After adding your comment you can choose to make it anonymous (or not) by selecting the ‘Make Anonymous’ box, and then clicking ‘Save’.

**Update User Profile**

All system users can customize the appearance of their profile within the Accreditation Online System.

1. Click on the circle with the picture (or grey silhouette) next to the CSBS logo.

2. Click ‘Profile’ from the list that appears.

3. Click the ‘Photos’ dropdown and then choose whether you want to change your Profile or Cover Photo.
4. Click Upload and then select a .jpg or .jpeg file from the location of the saved file on your computer. Once you have zoomed and repositioned the photo as necessary, click ‘Change Photo’.

User Settings
1. Click on the circle with the picture (or grey silhouette) next to the CSBS logo.

2. Click ‘Settings’ from the list that appears.
3. Change the Regional settings as necessary, and click ‘Save Changes’.
4. Change the Email Notifications settings as necessary, and click ‘Save Changes’.

5. Change the Mobile Notifications settings as necessary, and click ‘Save Changes’.
Contacts
For AOS questions or system related issues, email accreditation@csbs.org