How to Set Up Organization

An organization’s structure (hierarchy) is based on the information the customer submits to My InnerView through Organization Editor.

Organization Editor will be used for setting up and managing:

1. **Facilities** (term used to refer to the location - for example: nursing home, assisted living community)
2. **Regions** (although term implies a geographical location, it represents any sort of logical grouping or sub-grouping of facilities, such as areas, divisions)
3. **Users** (individuals within the organization who will have access to My InnerView’s members-only website)
4. **Groups** (an alternative to ‘Regions’ to give users access to a selected group of facilities that may not reside within the same ‘Region’.)

Organization Editor makes it possible for the organization to align a user to the specific level in the organization that is relevant to that person’s position; it also allows authorized users to generate roll-up reports by provider type for a region, group, or the entire organization.

Facilities and Regions

On the right, there is a sample organization as it is displayed in My InnerView’s system. Facilities are displayed with a house icon. This is referred to as a **Corporate Tree**. You can ‘drill down’ into any region (displayed as a ‘folder’) to view the facilities within the region.

(See ‘How to Add and Update Facilities’ and ‘How to Add and Update Regions’)

Note: **It is best if only one person in the organization sets up and manages the organizational structure** so that duplicative or oppositional changes do not occur; however, permission can be granted (by your organization’s Superuser) to any user to perform any of these tasks.

Groups

An alternative to regions, ‘Groups’ can be used to select facilities that share a common criteria but are not all part of the same region. For example, a group could contain all facilities with Alzheimer’s units or all facilities with a current culture-change initiative. Creating a group allows authorized users to view individual reports for each facility in the group OR a roll-up report for the entire group.

(See ‘How to Add and Update Groups’)

Users

Individuals’ access to My InnerView’s members website is controlled by a username and password, and access to particular entities within the organization (facilities, regions, groups) are controlled by ‘attachments’. Users’ functional capabilities and access to specific types of data are controlled by ‘permissions’.

(See ‘How to Add and Update Users’)
LOG IN

1. Go to nationalresearch.com/client-logins and select My InnerView

2. In the Log in box provided, enter your user name and password and click [Login]

3. Click on Organization Editor on the left-hand navigation bar

4. If you can’t remember your user name help@myinnerview.com

Note: If you do not see Organization Editor in the left-hand navigation bar or cannot perform a certain function within the tool, you may not have permission to do so. Contact your organization’s Superuser.