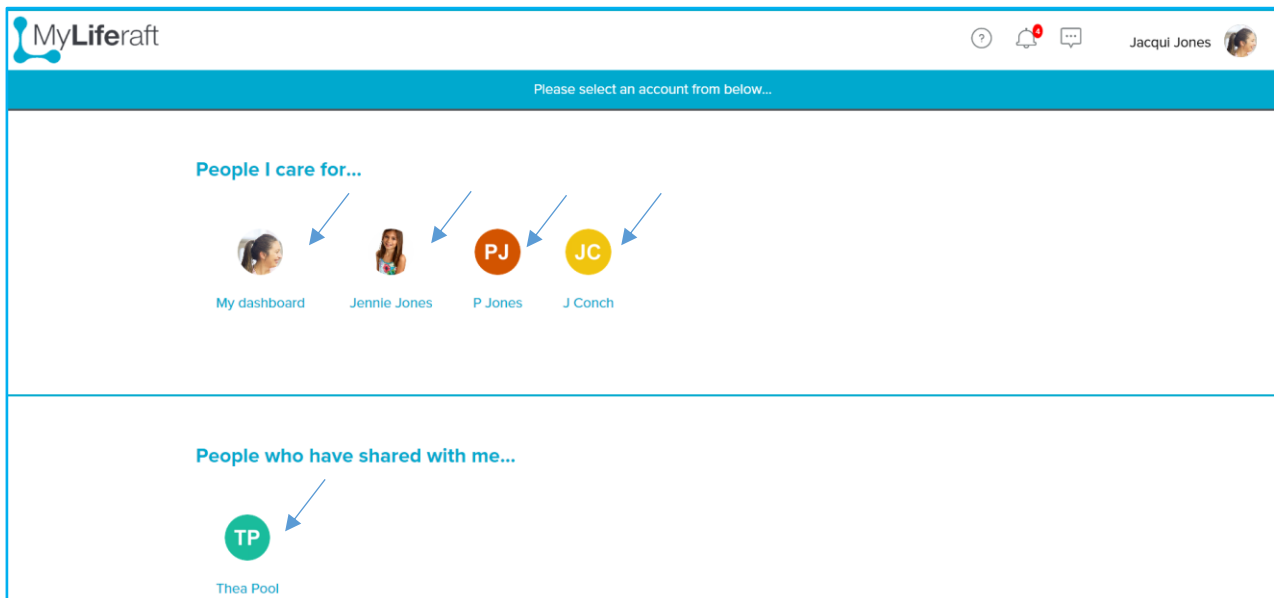


Getting Started – The Selection Screen and Dashboard

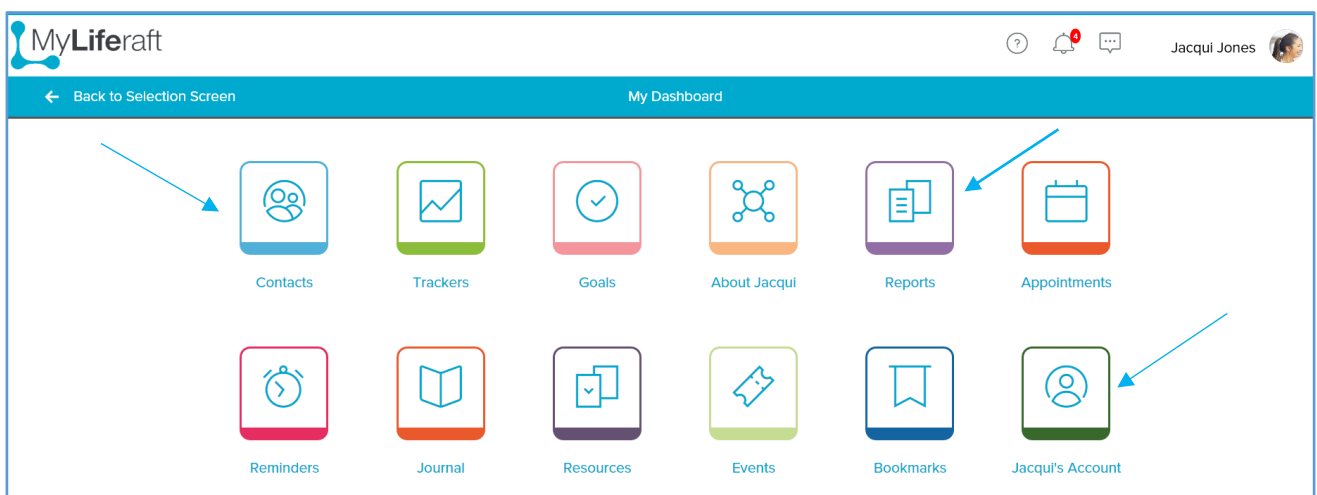
Selection Screen

If you are managing an account for another person (a managed user) or someone else is sharing their information with you the first screen you see will be a selection screen. Just click on the name of the account you want to access, yours or someone else's. You will then be taken to the dashboard of that person.



The dashboard

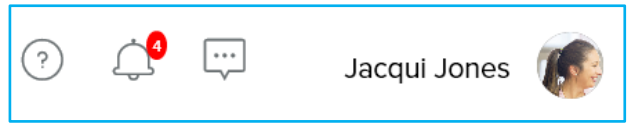
After selecting a user you will see their dashboard. This shows all areas of the system that can be accessed. Clicking on a tile will take you to that area of the system.



The top bar

This is visible on the dashboard and repeats on every page in the system Click on:

- **Your name:** to access your account menu
- **Speech bubble:** to see comments sent to you by users you are sharing information
- **Bell:** to see your notifications, reminders
- **Question mark:** to access **HELP** specific to the page you are on, either as a document or a video.



← Back to Dashboard

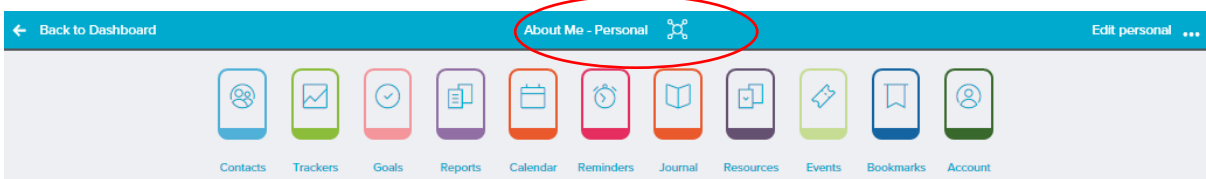
To return to the Dashboard from any page click on  in the top left of each page

Navigation

You can access all areas of the system from the dashboard by clicking on the tiles/icons.

OR

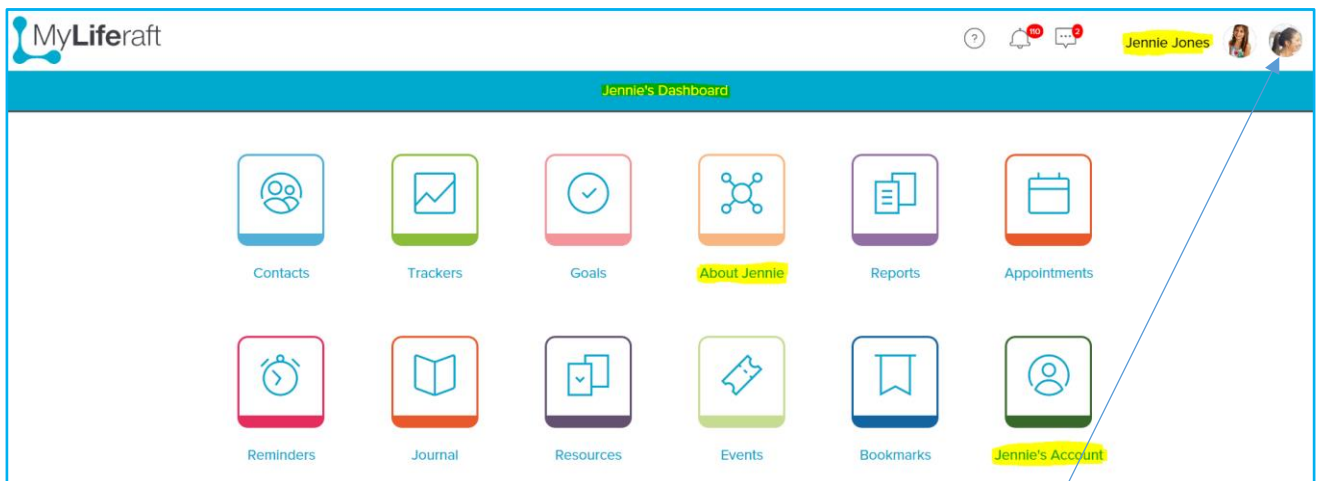
After selecting an area of the system, the top of each page shows the name of the area you are accessing. Click on this to see all the dashboard icons. You may now navigate directly to another area from these icons without going back to the dashboard. To hide the icons click on the category name again.



Viewing someone else's Dashboard:

If you are viewing the dashboard of a managed user or someone who is sharing their information with you the dashboard will look the same however you will **only see** those tiles where there is information that is being shared with you.

The highlights show the Indicators about whose dashboard you are viewing:



To navigate back to **your own** dashboard click on your name in the upper right