Lichtenberg **OlderAdultNestEgg.com**

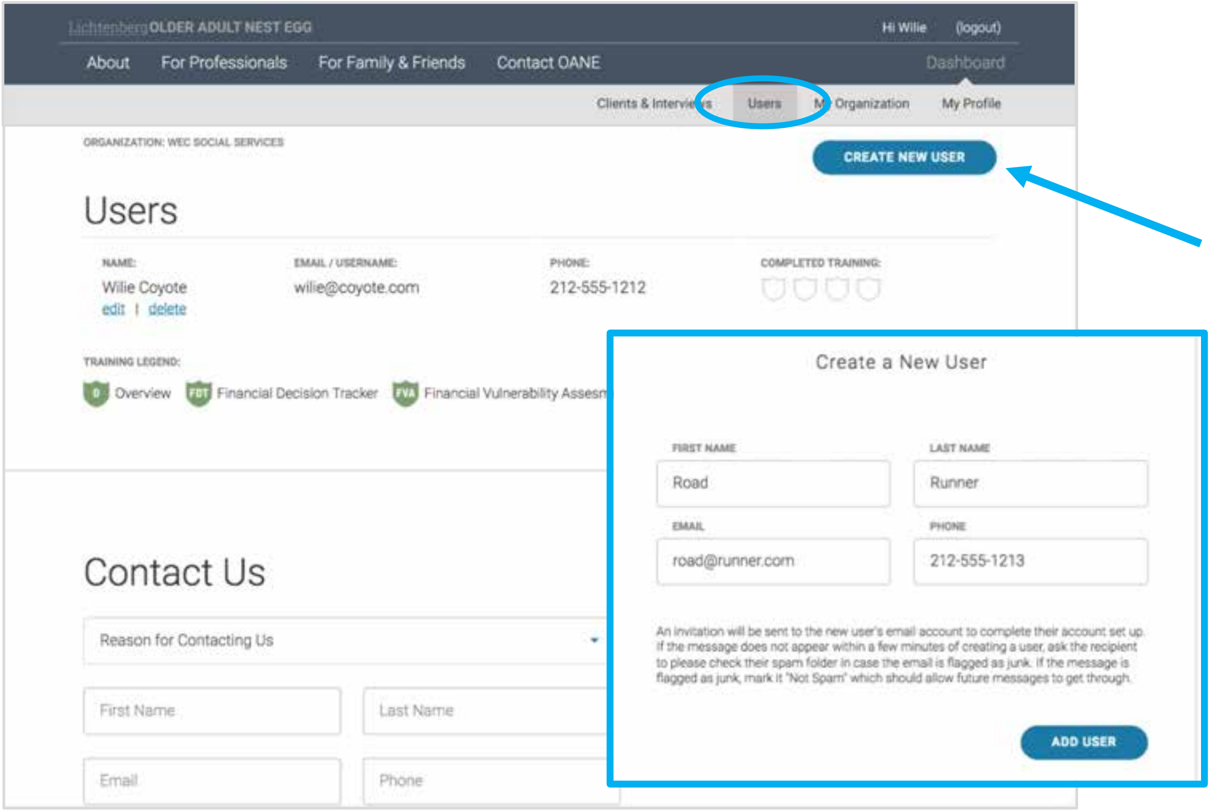
Administrative Features in OANE Organization Accounts

OANE Features to Help you Oversee and Customize Usage of your OANE Organization Account

(For Administrators)

- Adding and Inviting Users
- Certification Process
- Reports Dashboard
- Interview Log
- Customizing *Next Steps* Feature to align with your organiazation best practices

Adding and Inviting Users to Your OANE Organization Account



- While you are logged in to your OANE Organization Account, the header will change color and you will be on your admin **"Dashboard"**
- Select the **"Users"** tab in the primary navigation.
- Click **"Create New User"**

A **"Create a New User"** pop-up window will appear and you will enter the name, email and phone number of the user. When you do this, OANE automatically sends an email that instructs the new user how to set up a password for their login.

Continue to next page to view the automated email sent by the OANE system.

When you “Create a New User” an automated email will OlderAdultNestEgg.com will send this automated email to your user

Please note:
Before you start using the “Create a New User” feature to enter all your people, we recommend that you send an email to your potential users informing them that you’ve set up an organization account on Older Adult Nest Egg (OANE) and they should expect and email with a unique link in order to create a password to log in as a user. Stress that they must only use the password link provided in the OlderAdultNestEgg email.

They should not create an individual account by using the ”Sign Up” feature on Older Adult Nest Egg (OANE). If they do this, you will not be able to oversee the usage.

> Your organization administrator has created an account for you at Older Adult Nest Egg. Please use the following URL to create your password:
> https://app.olderadultnestegg.com/users/password-reset/ad6bc3037f29d11e6c3d4aa8456eb2e245bd5e7c17855e8829a27de83f14bf40
> After you have created a password your account activation is complete. You are now able to get certified and begin using the interview tools when you "Log in" at OlderAdultNestEgg.com.
>
> The above link for this invitation will expire in 72 hours. If you were not able to create your password before the link expired, click "Forgot Password" to receive another link.

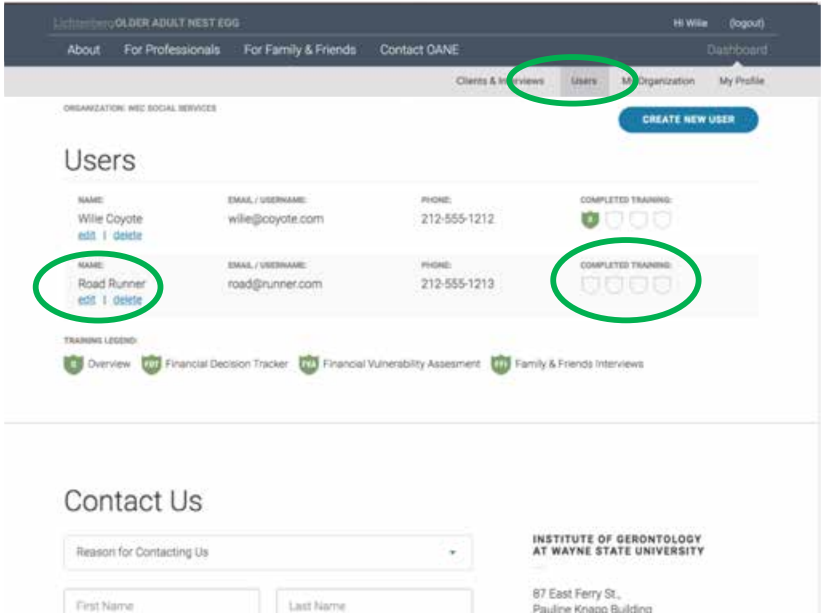
Once users have created a password for their account, they can start certification and usage of the tools by visiting OlderAdultNestEgg.com, clicking login in the upper right hand corner and entering their email address and password.

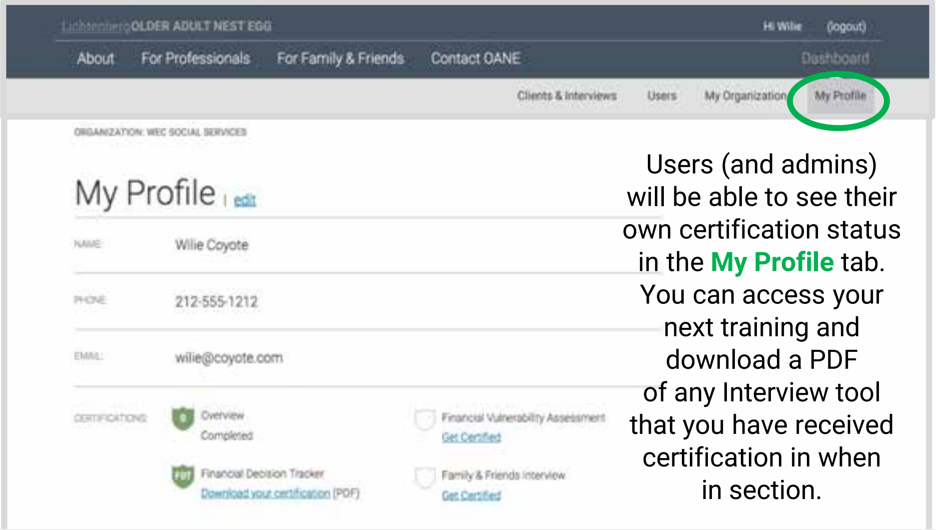
If your organization blocks outside emails, people may have to check their spam folder for their OlderAdultNestEgg.com invitation.

Admin Dashboard: Certification to use Interview tools

Admins will have four tabs when they are logged in and your users will only have only two tabs. Users will only have access to the, "Clients & Interviews" and "My Profile" tabs.

When your new users finalize the set up of their account with a password, they will appear in your dashboard under **Users**. You can edit their information or delete them from your organization. When their training badges turn green that means they have successfully completed the certification for a module.





Users (and admins) will be able to see their own certification status in the **My Profile** tab. You can access your next training and download a PDF of any Interview tool that you have received certification in when in section.

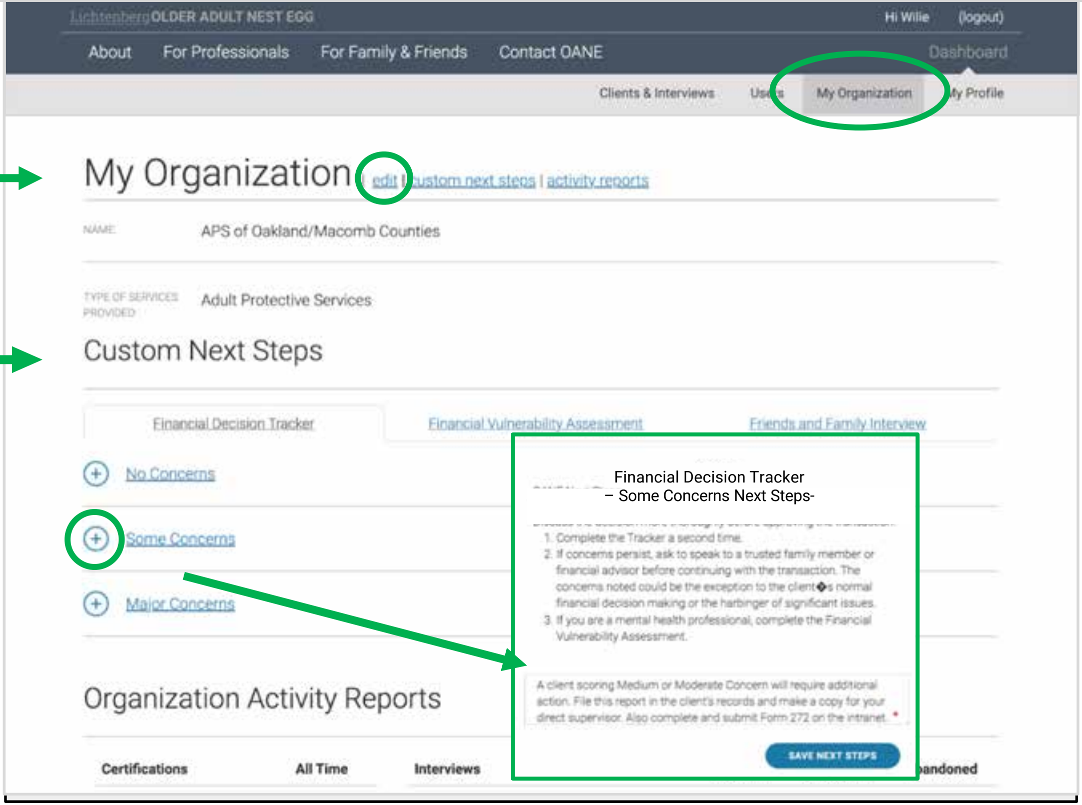
PLEASE NOTE: Certification of a very brief "overview" is required to access the Financial Decision Tracker (FVA). Once that is completed, the remaining two training modules will be unlocked for certification. Each Interview tool will become available after its post-test has been successfully completed. Users have told us that it has taken them between 45 minutes and 1.5 hours to get certified in all 4 modules at once. It Is not unusual to have to take the Financial Vulnerability Assessment (FVA) twice before passing.

Admin Dashboard

In the **My Organization** tab, an organizational admin can:

- Click on edit to make a correction to your organization's name
- Customize Next Steps for each interview tool
  1. Select the tool
  2. Its score levels will appear,
  3. Select Concern level to access it s and pop-up window. Add your information and save.
     This will be added to future reports that recieve this score

Below the Custom Next Step you will be able to view your Organization Activity Reports and Interview Log



Organization Activity Report & Interview Log

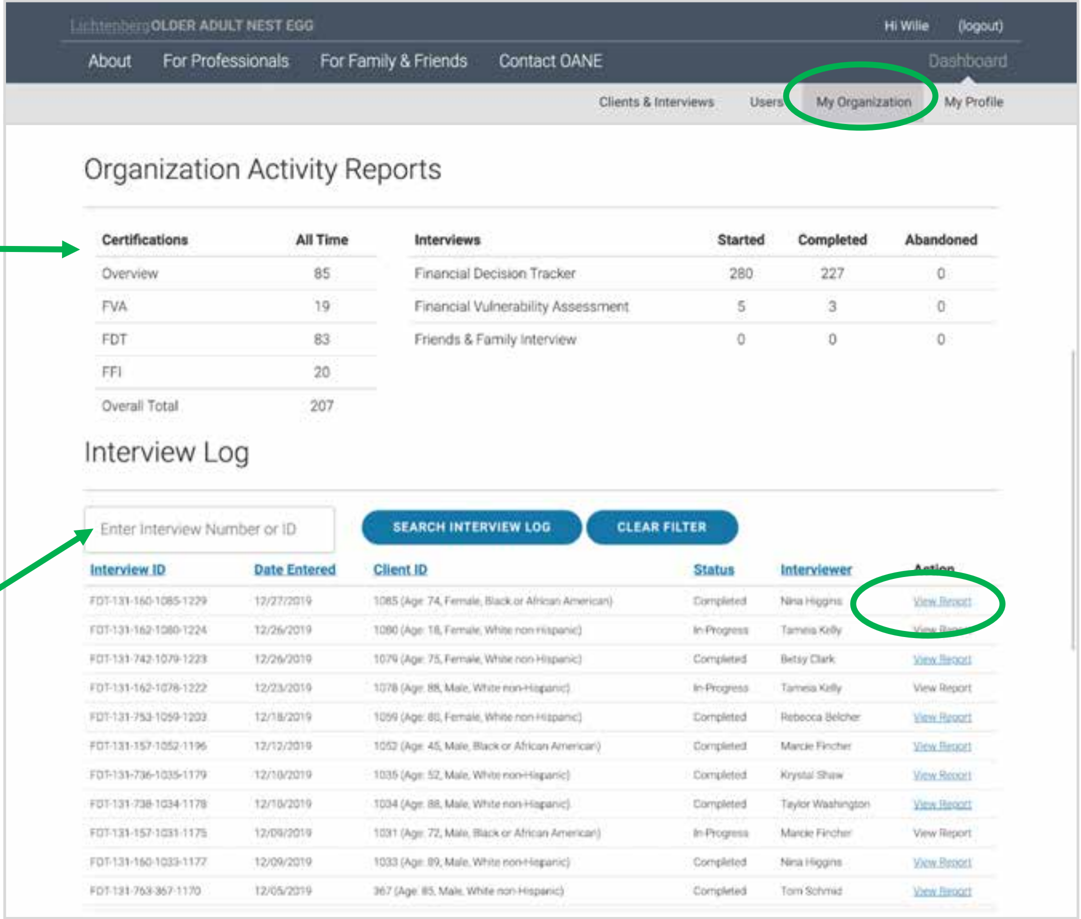
The Activity Reports and Interview Log are on the **My Organization** page after the Customize Next Steps

The dashboard gives you a snapshot count of certifications and interviews among your organization's users.

The **Interview Log** gives you a functional log of interviews among your users. All interviews created by any user in your organization will display in this log. (Notice that no names are indicated in the Client ID for privacy)

IF an interview is complete, then a link, View Report, will display under the Action column. If the interview is in progress, or started but not abandoned, the link will not be hot.

Use the **search feature** to locate a specific report. Enter any part of the numeric interview id number and exclude the 3 letter interview prefix. i.e. for FVA-131-256-568-010, enter any part of this string 131-256-568-010 and the system will return a filter list with any interview that matches your search criteria. Clear the filter by selecting the CLEAR FILTER button or refresh the page.



Certifications	All Time
Overview	85
FVA	19
FDT	83
FFI	20
Overall Total	207

Interviews	Started	Completed	Abandoned
Financial Decision Tracker	280	227	0
Financial Vulnerability Assessment	5	3	0
Friends & Family Interview	0	0	0

Interview ID	Date Entered	Client ID	Status	Interviewer	Action
FDT-131-160-1085-1229	12/27/2019	1085 (Age: 74, Female, Black or African American)	Completed	Nina Higgins	View Report
FDT-131-162-1080-1224	12/26/2019	1080 (Age: 18, Female, White non-Hispanic)	In-Progress	Tamela Kelly	View Report
FDT-131-742-1079-1223	12/26/2019	1079 (Age: 75, Female, White non-Hispanic)	Completed	Betsy Clark	View Report
FDT-131-162-1078-1222	12/23/2019	1078 (Age: 88, Male, White non-Hispanic)	In-Progress	Tamela Kelly	View Report
FDT-131-753-1059-1203	12/18/2019	1059 (Age: 80, Female, White non-Hispanic)	Completed	Rebecca Belcher	View Report
FDT-131-157-1052-1196	12/12/2019	1052 (Age: 45, Male, Black or African American)	Completed	Marcie Fincher	View Report
FDT-131-736-1035-1179	12/10/2019	1035 (Age: 52, Male, White non-Hispanic)	Completed	Krystal Shaw	View Report
FDT-131-738-1034-1178	12/10/2019	1034 (Age: 88, Male, White non-Hispanic)	Completed	Taylor Washington	View Report
FDT-131-157-1031-1175	12/09/2019	1031 (Age: 72, Male, Black or African American)	In-Progress	Marcie Fincher	View Report
FDT-131-160-1033-1177	12/09/2019	1033 (Age: 89, Male, White non-Hispanic)	Completed	Nina Higgins	View Report
FDT-131-763-367-1170	12/05/2019	367 (Age: 85, Male, White non-Hispanic)	Completed	Tom Schmid	View Report

When you select a **View Report** link, you will see: The name of the interview used, what prompted the report, its risk score, next steps recommend by OANE and your organization, resources and the all questions with responses.

Age: 70 | Race/Ethnicity: White non-Hispanic | **Client ID: 193**
Gender: Female | Education: Bachelor's degree | **Interview ID: FDT-001-135-193-265**

Financial Decision Tracker

RESULTS FOR:

FINANCIAL DECISION YOU ARE MAKING/HAVE MADE:

Investment planning (retirement, insurance, portfolio balancing)

INTERVIEW DATE: MARCH 28, 2019

OLDER ADULT NEST EGG DECISIONAL ABILITY SCORE

No Concerns

Based on interview, we recommend the decisional ability grade of no concerns for your client's financial decisional abilities to make this decision/transaction.

Risk Rating: 4

Your client scored in the low risk range. The Tracker identifies no concerns about your client's ability to make this financial decision.

RATING REFERENCE

NO CONCERNS	SOME CONCERNS	MAJOR CONCERNS
Clients at low risk demonstrate the capacity to make their financial decisions with awareness, integrity and autonomy. If a transaction is involved, it should be allowed to proceed.	Clients at moderate risk demonstrate a degree of impairment in their capacity to make the financial decision with awareness, integrity and autonomy. The cause of this impairment could be a temporary issue or the beginnings of a more serious deficit. Capacity could be affected by the degree of complexity of the financial decision. We recommend postponing any financial transaction. Further evaluation of the client may be necessary.	Clients at high risk demonstrate a significant degree of impairment in their capacity to make the financial decision with awareness, integrity and autonomy. We recommend postponing any financial transaction and encouraging the client to receive further evaluation.

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Next Steps for No Concerns

RECOMMENDED ACTIONS

Allow the completion of the financial transaction related to this decision.

1. This financial decision has been made with awareness, integrity and autonomy, at this time.
2. Situations and influence can change. Use the Tracker on a future decision, if you have reason to be concerned.

ORGANIZATION PROCEDURE - SPECIFIC NEXT STEPS

Here are some custom Next Steps

RESOURCES

Administration on Aging

AARP

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ORGANIZATION PROCEDURE - SPECIFIC NEXT STEPS

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RESOURCES

Administration on Aging
https://www.acl.gov/index.php/about-acl/administration-aging

National Adult Protective Services
Contact to find your nearest state chapter to report suspected abuse or exploitation
http://www.napsa-now.org/get-help/how-aps-helps/

Adult Protective Services of Michigan
1-855-444-3911

Alzheimer's Association
Guidance, education and tools about cognitive assessments and how to determine whether a client needs further evaluation
http://www.alz.org

AARP
http://www.aarp.org

American Psychological Association
Office on Aging
http://www.apa.org/pi/aging

Consumer Financial Protection Bureau
For complaints against lenders or financial products and services
http://www.consumerfinance.gov/complaint

Federal Trade Commision (To Report Identity Theft)
https://www.consumer.ftc.gov/articles/0277-create-identity-theft-report
1-877-438-4338

Responses

Q1 **What financial decision are you making or have made?**
Investment planning (retirement, insurance, portfolio balancing)
Do you agree with the respondent's answer?
Yes

Q2 **Was this your idea or did someone else suggest it or accompany you?**
Your idea
Do you agree with the respondent's answer?
Yes

Q3 **What is the primary purpose of this decision?**
Benefit family (who?) - changing beneficiary from husband (died) to remaining sister and nieces and nephew
Do you agree with the respondent's answer?
Yes

Q4 **What is your primary financial goal for this decision?**
Share wealth after your death

Q5 **How will this decision impact you now and over time?**
No impact
Do you agree with the respondent's answer?
Yes

Q6 **How much risk is there to your financial well-being?**
Low risk or none
Do you agree with the respondent's answer?
Yes

Q7 **How might someone else be negatively affected?**
Family member(s) (who & why?) - money upon my death
Do you agree with the respondent's answer?
Yes

Q8 **Who benefits most from this financial decision?**
Family (who?)
Do you agree with the respondent's answer?
Yes

Q9 **Does this decision change previous planned gifts or bequests to family, friends, or organizations?**
Yes (who & why?)
Do you agree with the respondent's answer?
Yes

Q10a **To what extent did you talk with anyone regarding this decision?**
Mentioned it (to who?) - neighbor
Do you agree with the respondent's answer?
Yes

Q10b **Who did you discuss this with? Mark all that apply:**
Family member, Friend, Other (who?) - bank
Do you agree with the respondent's answer?
Yes

You can also Download a report as a PDF.

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OlderAdultNestEgg.com is FREE to all users because of support from the National Institute of Justice, Foundation for Financial Health, Michigan Aging and Adult Services PRVENT Program Michigan Health Endowment Fund, State of Michigan, Wayne State University Technology Commercialization, American House Foundation and the Mary Thompson Foundation.

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