

# ERP Portal Walkthrough

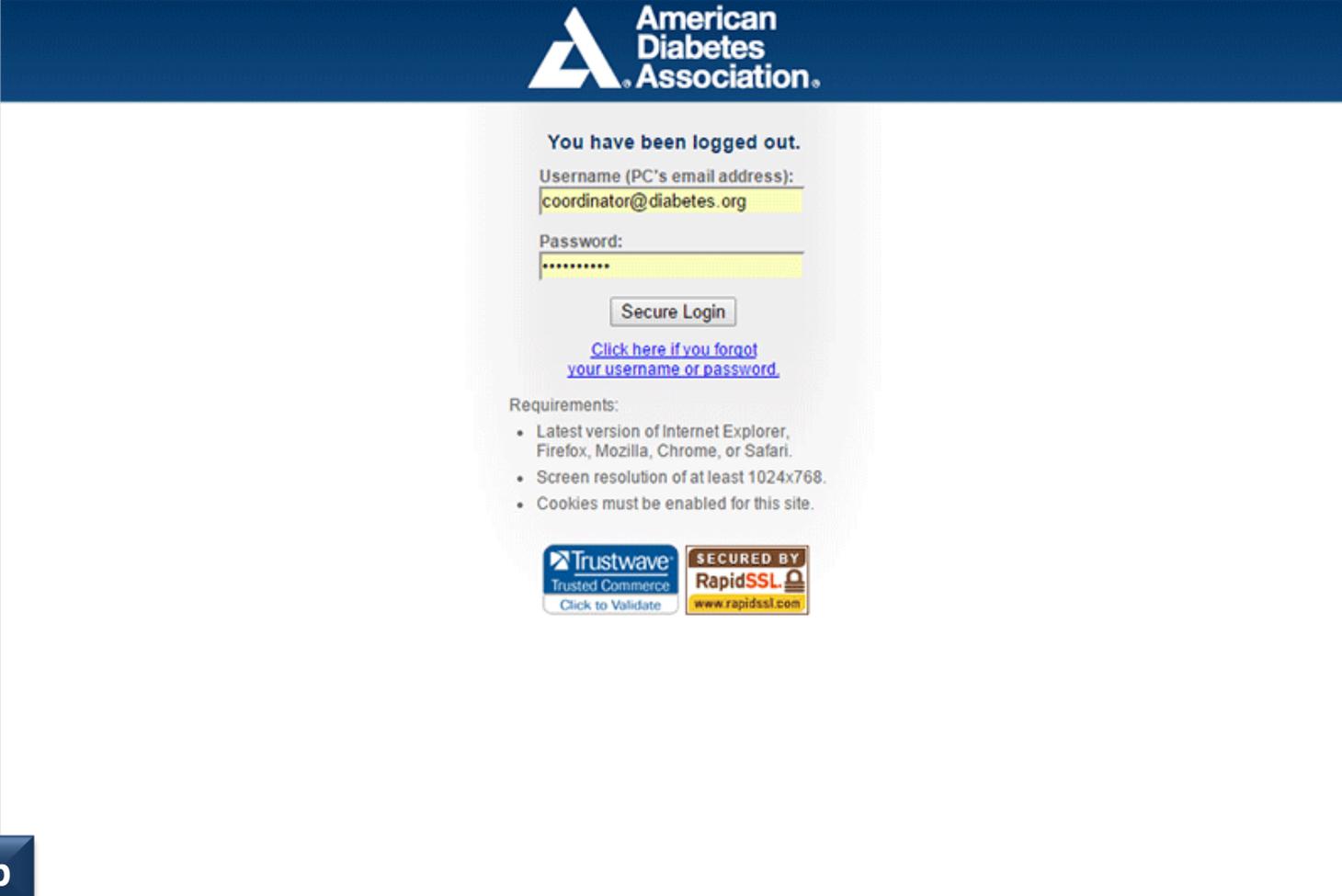
- [Getting Started](#)
- [Program Information](#)
- [Site Information](#)
- [Staff Information](#)
- [Chronicle Diabetes](#)
- [Applications & Annual Status Reports](#)
- [Reports](#)
- [ERP Resources](#)

# Getting Started:

## Logging In

The ERP portal is where you will go to submit Annual Status Reports, Applications and manage your program's information. You can always access it by going to this web page (which you can bookmark): <https://erp.diabetes.org/>

**Note:** If you are logging into the Portal for the first time, your email address will be the username **AND** password.



 American  
Diabetes  
Association.

You have been logged out.

Username (PC's email address):

Password:

[Click here if you forgot your username or password.](#)

Requirements:

- Latest version of Internet Explorer, Firefox, Mozilla, Chrome, or Safari.
- Screen resolution of at least 1024x768.
- Cookies must be enabled for this site.

 Trustwave  
Trusted Commerce  
Click to Validate

 SECURED BY  
RapidSSL  
www.rapidssl.com

# Getting Started:

## Service Agreement

If you are accessing the ERP Portal for the first time you will be presented with the ERP Portal and Chronicle Diabetes Service Agreement. You will have the ability to: Accept the Agreement Electronically, Download the PDF version of the agreement or Postpone accepting the agreement. **Note:** The agreement must be accepted in order to complete ASRs and Applications.

EDUCATION RECOGNITION PROGRAM PORTAL and CHRONICLE DIABETES Service Agreement
Help

[Download Legal Agreement](#)

**Option 1 - Accept** Select to enter your program's authorized signatory electronically.

**Option 2 - Upload** First download PDF of legal document at link above. Print, sign, and scan document. Then select Option 2 to upload the signed and scanned copy of the agreement.

**Option 3 - Postpone** Select to postpone accepting agreement. You can postpone acceptance for up to 30 days, after which you will be unable to enter the ERP site.

 GRACE PERIOD REMAINING: 30 days

**EDUCATION RECOGNITION PROGRAM PORTAL and CHRONICLE DIABETES<sup>SM</sup> Service Agreement**

Last updated: October 17, 2011

**1. What the Service Agreement covers.**

This is a Service Agreement between you and American Diabetes Association for use by residents in the United States. American Diabetes Association is sometimes referred to as "we," "us" or "our." This Service Agreement applies to your use of the Education Recognition Program portal at [erp.diabetes.org](http://erp.diabetes.org) ("ERP Site") which includes the ERP online application, annual status report, other program management tools and, if you elect, our secure web-based *Chronicle Diabetes<sup>SM</sup>* patient registry software and service at [edu.ChronicleDiabetes.com](http://edu.ChronicleDiabetes.com) ("Chronicle") - which is made available for your use through the ERP portal. The services via ERP portal and "Chronicle" are collectively referred to in this User Agreement as the "Service." You acknowledge and agree that the terms of this User Agreement, including any updates, applies to your use of the Service.

However, you understand that you will be required to read, agree to and execute a separate Business Associate Agreement before you can access and use Chronicle.

The terms of this Service Agreement do not apply to any of your other American Diabetes Association's accounts or to other programs or device drivers that work with those other accounts. Those have separate agreements. This applies to your use of the Service including updates that you use while this Service Agreement is in force.

*Services Furnished by American Diabetes Association:* The purpose of the Service is to provide a clinical management tool that facilitates the process for applying for and maintaining ADA Recognition. The use of the Chronicle service, if you elect to use it, will serve to create a diabetes education record for your program participants and to develop a repository for patient education data that will be

Option 1 - Accept Online Agreement

Option 2 - Upload Scanned Agreement

Option 3 - Postpone Accepting Agreement

[Back to Top](#)

# ERP Portal - Program Information

The **Program Information** page lists the information on file for your program. Please review all of this information and make sure that it is correct. If there is anything that is incorrect or incomplete, you can edit the information on this page by clicking the **Edit pencil** above each section.

**Note:** All information sent via postal mail is mailed to the Program Coordinator Address in this section.



[Legal Agreements](#)
[ADA Legal Policies](#)

Program
Applications / ASRs
Reports

Program Information

**Program Information**

Site(s) Information

Staff Information

Chronicle Diabetes

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 Order New Certificate

## ERP DSME PROGRAM

### Program Information

**Sponsoring Organization** 

ERP DSME PROGRAM	
Program ID:	005947
Administrative Officer Name:	John Doe
Street 1:	1701 North Beauregard St
Street 2:	No value
City:	Alexandria
State:	VA
Postal Code:	22311
Phone:	703.549.1500
Fax:	No value
Email:	No value

### Program Recognition

Date Approved	Feb 21, 2013
Date Start	Jun 1, 2009
Date End	Jun 3, 2013

### Program Coordinator



Name:	Program Coordinator
Title:	Program Manager
Street 1:	1701 N Beauregard St
Street 2:	No value
City:	Alexandria
State:	VA
Postal Code:	22311
Work Phone:	7035491500
Mobile Phone:	No value
Fax:	No value
Email:	coordinator@diabetes.org
Certifications:	
Credentials:	

[Back to Top](#)

# ERP Portal – Site Information

The Sites Information page lists all of the sites associated with your program, with multi-sites listed left-justified and expansion sites indented under their parent multi-site. You can view detailed information about each site by clicking the Show Details link to the right of the site's name. If there is anything that is incorrect or incomplete, you can edit the information by clicking the **Update** pencil above each site.



[Legal Agreements](#)   [ADA Legal Policies](#)

Program   Applications / ASRs   Reports

Program Information

Program Information

Site(s) Information

Staff Information

Chronicle Diabetes

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 Order New Certificate

## ERP DSME PROGRAM

+ Add New Site

### Site(s) Information

★ = Recognized Site   
 ✖ = Non-recognized Site

**Open Sites**

★ **Diabetes Self-Management Education Program** [Hide Details](#)

Primary / Main site

Contact Information			
Name:	Diabetes Self-Management Education Program		
Phone:	7035491500	Street 1:	1701 North Beauregard St
Fax:	No value	Street 2:	No value
Single Discipline:	No	City:	Alexandria
Spanish:	Yes	State:	VA
		Postal Code:	22311

Site Setting
 Update

Community based  
Outpatient hospital based

Expansion / Multi Site
 Update

This site is a Multi Site. This site has 18 Expansion Site(s) assigned to it.

**Closed / Inactive Sites**

**AAAAA**

Status:	Closed
Date:	May 16, 2013
Reason:	fsadfa

**dfgdssafdsa**

Status:	Closed
Date:	May 16, 2013
Reason:	wdfsa

**GO GO**

Status:	Closed
Date:	Jan 1, 2014
Reason:	Test Closed

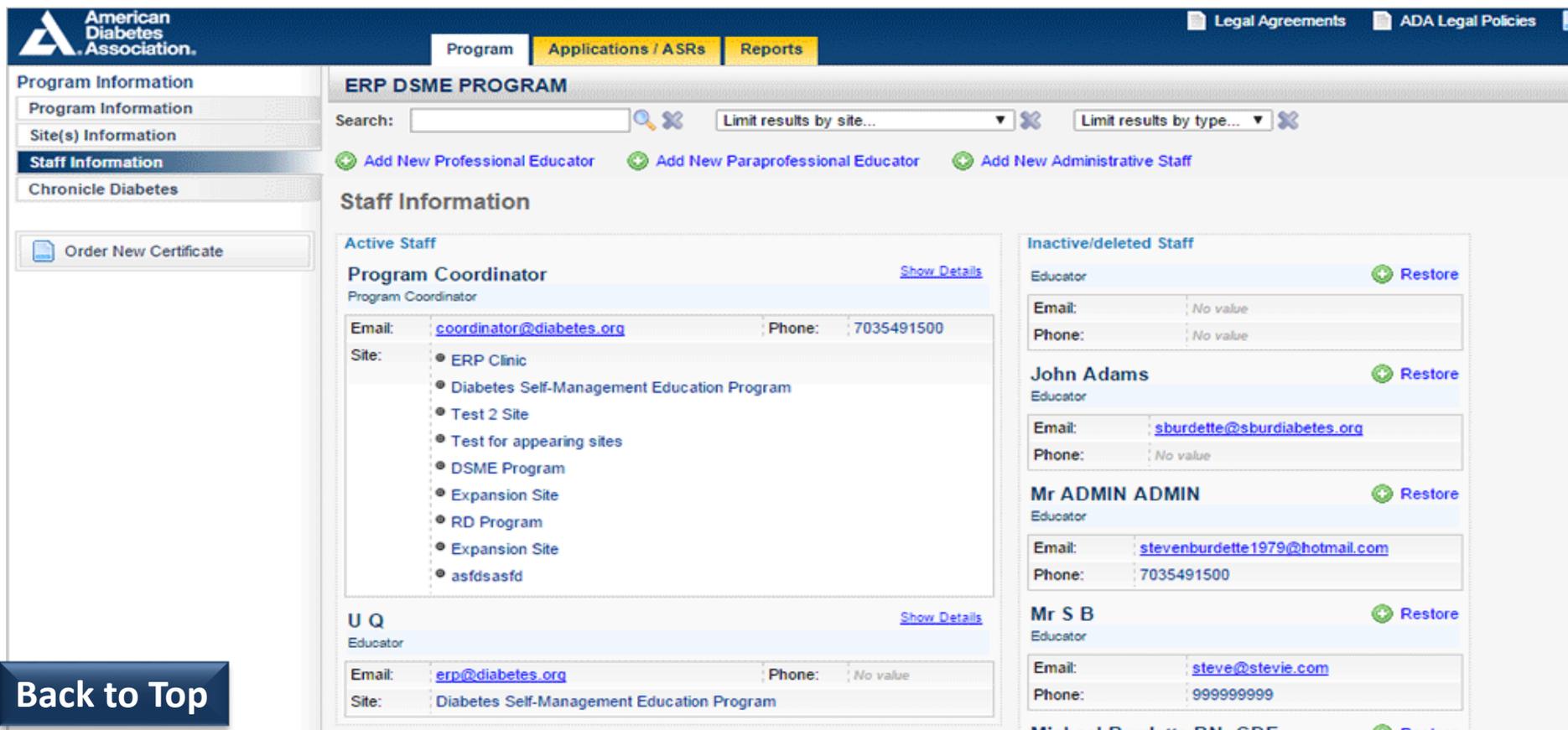
**SB**

Status:	Closed
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Back to Top

# ERP Portal – Staff Information

The **Staff Information** page lists all of the staff active at any of the sites within your program. To add a new staff member, click the **Add New: Professional or Paraprofessional or administrative Member** link near the top of this page. Fill out as much information on this page as you would like. Required fields are first and last name and email address. You can also designate what site this staff member is assigned to. **Chronicle Users** - You can assign staff members to the appropriate site and designate access to Chronicle in this section. Please visit [www.diabetes.org/cd](http://www.diabetes.org/cd) for more information.



The screenshot shows the ERP DSME PROGRAM interface. At the top, there are navigation tabs for Program, Applications / ASRs, and Reports. The left sidebar contains links for Program Information, Site(s) Information, Staff Information (highlighted), Chronicle Diabetes, and Order New Certificate. The main content area is titled 'ERP DSME PROGRAM' and includes a search bar, filters for site and type, and three buttons to add new staff: Add New Professional Educator, Add New Paraprofessional Educator, and Add New Administrative Staff.

**Staff Information**

**Active Staff**

- Program Coordinator** (Show Details)
  - Email: [coordinator@diabetes.org](mailto:coordinator@diabetes.org) Phone: 7035491500
  - Site:
    - ERP Clinic
    - Diabetes Self-Management Education Program
    - Test 2 Site
    - Test for appearing sites
    - DSME Program
    - Expansion Site
    - RD Program
    - Expansion Site
    - asfdsasfd
- U Q** (Show Details)
  - Role: Educator
  - Email: [erp@diabetes.org](mailto:erp@diabetes.org) Phone: No value
  - Site: Diabetes Self-Management Education Program

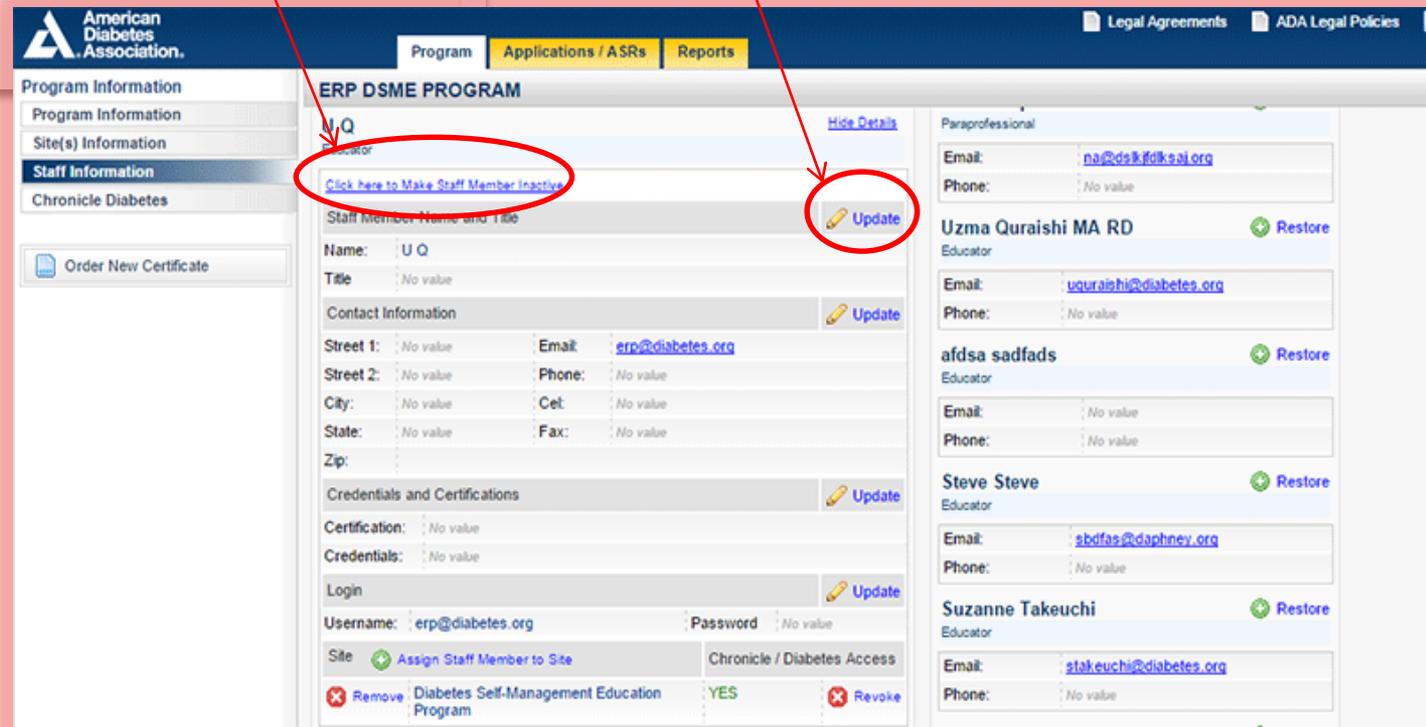
**Inactive/deleted Staff**

- John Adams** (Restore)
  - Role: Educator
  - Email: [sburdette@sburdiabetes.org](mailto:sburdette@sburdiabetes.org) Phone: No value
- Mr ADMIN ADMIN** (Restore)
  - Role: Educator
  - Email: [stevenburdette1979@hotmail.com](mailto:stevenburdette1979@hotmail.com) Phone: 7035491500
- Mr S B** (Restore)
  - Role: Educator
  - Email: [steve@stevie.com](mailto:steve@stevie.com) Phone: 999999999

**Back to Top**

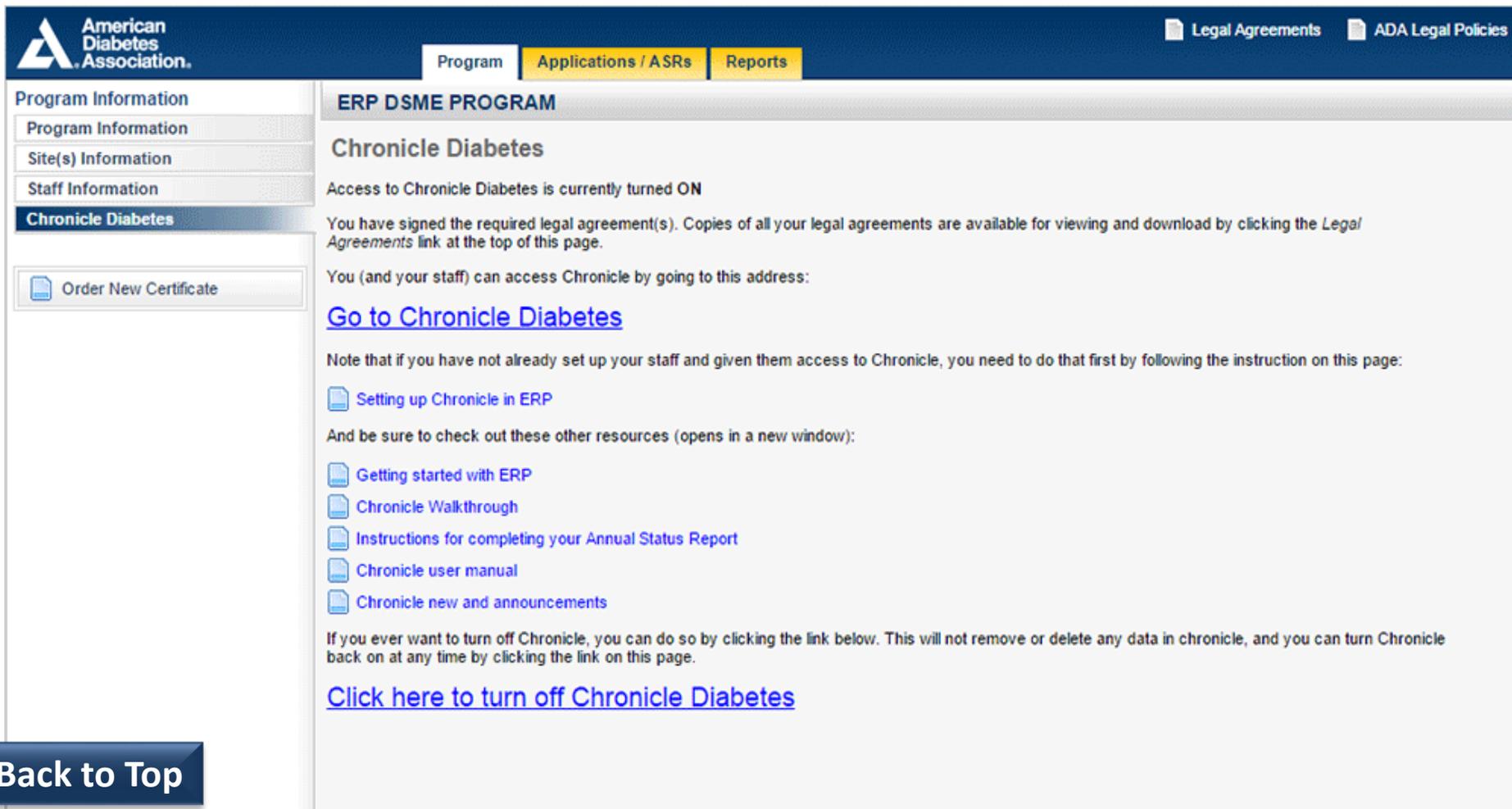
## ERP Portal – Staff Information (2)

To view details about a specific staff member, click the **Show Details** link. You can then edit the information about the staff member by clicking the **Update** pencil next to that information block. You can use the **Click here to Make Staff Member Inactive** link to inactivate a staff member. This will move the member to the Inactive/Deleted column and prevent them from logging into their Chronicle site(s) (see below). You can always make them active again if you need to.



# ERP Portal – Chronicle Diabetes

The Chronicle Diabetes section provides you with the ability to view and download the Business Associate Addendum prior to accessing the system. For more information on Chronicle Diabetes, please visit [www.diabetes.org/CD](http://www.diabetes.org/CD)



The screenshot shows the ERP Portal interface for the American Diabetes Association. The top navigation bar includes the ADA logo, the text "American Diabetes Association", and links for "Legal Agreements" and "ADA Legal Policies". Below the navigation bar are tabs for "Program", "Applications / ASRs", and "Reports". The main content area is titled "ERP DSME PROGRAM" and "Chronicle Diabetes". It states that access to Chronicle Diabetes is currently turned ON and that the user has signed the required legal agreement(s). A link for "Go to Chronicle Diabetes" is provided. Below this, there is a note about setting up staff access and a list of resources including "Setting up Chronicle in ERP", "Getting started with ERP", "Chronicle Walkthrough", "Instructions for completing your Annual Status Report", "Chronicle user manual", and "Chronicle new and announcements". A link to "Click here to turn off Chronicle Diabetes" is also present. The left sidebar contains a menu with "Program Information", "Site(s) Information", "Staff Information", and "Chronicle Diabetes" (which is highlighted). Below the menu is a button for "Order New Certificate".

Program Information

Program Information

Site(s) Information

Staff Information

**Chronicle Diabetes**

Order New Certificate

Program Applications / ASRs Reports

Legal Agreements ADA Legal Policies

ERP DSME PROGRAM

## Chronicle Diabetes

Access to Chronicle Diabetes is currently turned ON

You have signed the required legal agreement(s). Copies of all your legal agreements are available for viewing and download by clicking the *Legal Agreements* link at the top of this page.

You (and your staff) can access Chronicle by going to this address:

[Go to Chronicle Diabetes](#)

Note that if you have not already set up your staff and given them access to Chronicle, you need to do that first by following the instruction on this page:

[Setting up Chronicle in ERP](#)

And be sure to check out these other resources (opens in a new window):

- [Getting started with ERP](#)
- [Chronicle Walkthrough](#)
- [Instructions for completing your Annual Status Report](#)
- [Chronicle user manual](#)
- [Chronicle new and announcements](#)

If you ever want to turn off Chronicle, you can do so by clicking the link below. This will not remove or delete any data in chronicle, and you can turn Chronicle back on at any time by clicking the link on this page.

[Click here to turn off Chronicle Diabetes](#)

Back to Top

# ERP Portal – Applications/ASRs

When you're ready to start a new Application or complete your Annual Status report, you can begin by clicking on the **Applications/ASRs** tab. You also have access to previous Applications and Annual Status Reports in this section. The Application/ASR can be printed by clicking on the *magnifying glass* next to the appropriate Application or ASR.



[Legal Agreements](#)   [ADA Legal Policies](#)

Program
Applications / ASRs
Reports

### Applications / ASRs List

	Returned to Program for updates on Jun 6, 2013	Testing Invoice	Testing 123
	Ready for review on Mar 14, 2012	SB	
	Failed Review on Feb 9, 2012	AAAAA	Test Only

#### Annual Status Report

An Annual Status Report (ASR) is required to be complete every year. You'll be notified by email that you can complete your ASR. You will be able to complete and submit your ASRs when prompted by ERP in advance of when it is due; plus review ASRs submitted during this new system.

Below is a list of all of the existing ASRs that have ever been added to your program. If an ASR has a magnifying glass next to it, that means that the ASR is locked and you can click the magnifying glass to view (but not edit) the ASR. If an ASR has a pencil next to it, that means that the ASR is unlocked and you can click the pencil to view, edit, and eventually submit the ASR.

#### Previous Annual Status Reports

Status	Note
	Passed Review on Nov 13, 2014
	Passed Review on Apr 21, 2014
	Passed Review on Apr 21, 2014
	Passed Review on Mar 7, 2012
	Passed Review on Feb 10, 2012
	Passed Review on Jan 26, 2012
	Passed Review on Jan 4, 2012

#### Renewal Application

There is currently an active Renewal Application for your program. This application has not yet been submitted to ADA for review. If all of the information for this application has been completed, you can open the application and submit it to ADA for review. Otherwise, if there is still information that needs to be completed, you can open this application and complete this information. In either case, click the link to the right to open the active Renewal Application.

Based on your program's current recognition dates, if you haven't completed a Renewal Application by , your program will become disabled and you'll need to contact ADA at 888-232-0822 to take further action.

Below is a list of all of the existing Renewal Applications that have ever been added to your program. If an application has a magnifying glass next to it, that means that the application is locked and you can click the magnifying glass to view (but not edit) the application. If an application has a pencil next to it, that means that the application is unlocked and you can click the pencil to view, edit, and eventually submit the application.

[Open and Edit Renewal Application](#)  
Started on Dec 8, 2014

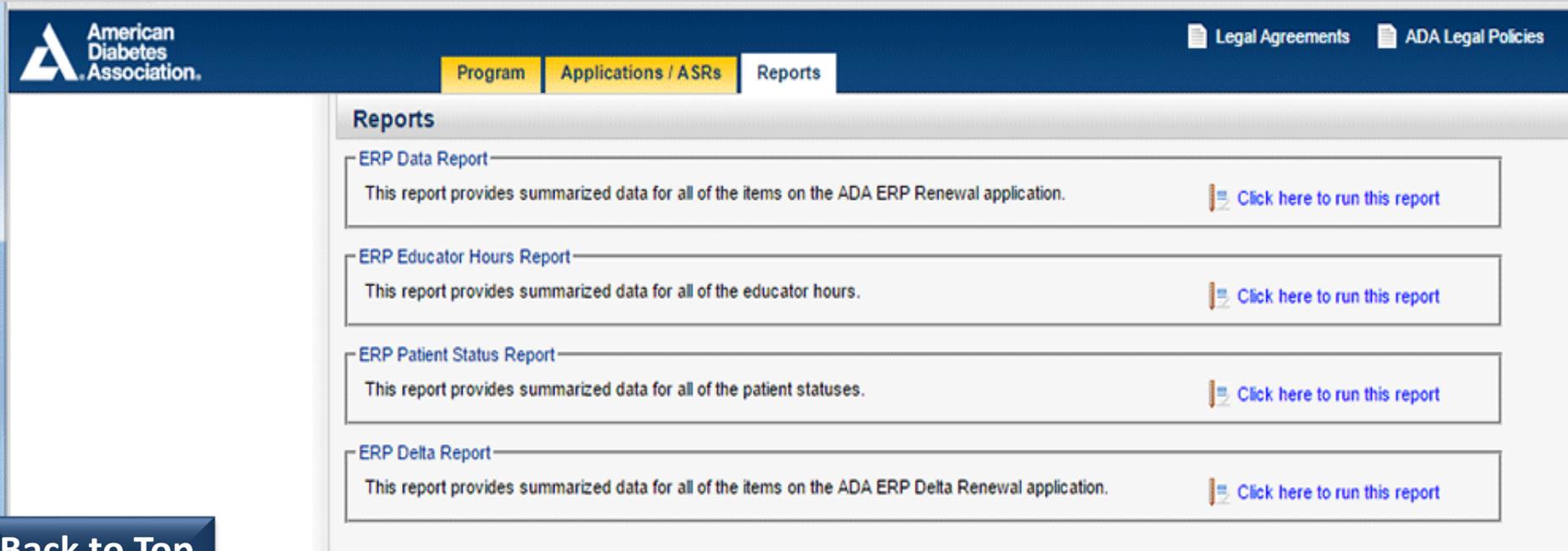
[Delete Renewal Application](#)

Back to Top

# ERP Portal – Reports

The reports section allows you to pull reports based off of past Renewal applications and data entered in Chronicle Diabetes.

- **ERP Data Report** - Summarized data for all of the items on the most recent ADA ERP Renewal application
- **ERP Educator Hours Report** - Summarized data for all of the educator hours in Chronicle
- **ERP Patient Status Report** - Summarized data for all of the patient statuses in Chronicle
- **ERP Delta Report** - Summarized data for all of the items on the ADA ERP Delta Report from the most recent Renewal application



The screenshot shows the American Diabetes Association ERP Portal interface. The top navigation bar includes the ADA logo, the text "American Diabetes Association", and links for "Legal Agreements" and "ADA Legal Policies". Below the navigation bar are three tabs: "Program", "Applications / ASRs", and "Reports", with "Reports" being the active tab. The main content area is titled "Reports" and lists four report options, each with a description and a "Click here to run this report" link.

Report Name	Description	Action
ERP Data Report	This report provides summarized data for all of the items on the ADA ERP Renewal application.	<a href="#">Click here to run this report</a>
ERP Educator Hours Report	This report provides summarized data for all of the educator hours.	<a href="#">Click here to run this report</a>
ERP Patient Status Report	This report provides summarized data for all of the patient statuses.	<a href="#">Click here to run this report</a>
ERP Delta Report	This report provides summarized data for all of the items on the ADA ERP Delta Renewal application.	<a href="#">Click here to run this report</a>

[Back to Top](#)