



RHFAC Registry **Client User Guide**

www.Registry.RickHansen.com

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I. Create an Organization Account

An Organization Account is needed to create and manage Sites that a User would like to rate using the interactive RHFAC Rating Survey.

If your Organization Account has already been created see **Section II**, Add a New User.

To create an Organization Account:

1. Click the **Register now** button on the top right of the home page.
2. **Register your Organization:** enter your Organization's name and click Register.
3. **Create your User Account:** Enter your information to create your User Account and click Create. The User that creates the Organization will be automatically designated as the Organization Manager and have administrative privileges. See Table 1 below for a detailed list of permissions.
4. **Enter Organization details:** Complete the fields to create the Organization. Click **Review Organization** details on the bottom right.
5. **Review Organization details:** Review the information you have entered for accuracy. If you need to edit, click on the Edit details button at the bottom left of the screen. If you are satisfied with the information, confirm you agree to the Terms of Service and click Register Organization. You must click to open the Terms of Service before you can proceed.
You will not be able to edit the Organization name after this step.

Your Organization Account will be verified by the Registry Administrator to ensure there are no duplicates (existing Organizations with the same name). When verification is complete you will receive an email to confirm the Organization Account has been approved. You do not need to wait for approval to register a Site.

If a duplicate is identified the Registry Administrator will contact you to confirm if the Organization Account should merge with the existing and support you with next steps.

II. Add a new User

A User Account is created to join an existing Organization Account. Once the account is created, the User can create and manage Sites they would like to rate using the RHFAC Rating Survey. User Accounts are created by invitation only. Invitations to Users can only be sent by an existing User with the **Organization Manager** role.

Add a User to an existing Organization:

1. Click the **sign in** button on the top right of the home page to sign in to your account.
2. Select **Users** from the menu on the left navigation bar.
3. Click on **Invite User** in the right corner.
4. Complete their name, email, and role (Member or Organization Manager).
Table 1 outlines the permissions for each User type.
5. Click **Send invitation**.

The User will receive an invitation to create an account via email.
See **Section III** for instructions on how to accept this invitation.

The status will remain pending until the new User creates their account.
Once they sign in the status will change to active.

Table 1: User types & permissions

| Actions | Organization Manager | Member | Registry Administrator |
|--|----------------------|--------|------------------------|
| Add Users | ✓ | | ✓ |
| Deactivate Users | ✓ | | ✓ |
| View a list of all Users | ✓ | | ✓ |
| Create a Site | ✓ | ✓ | |
| Delete a Site* | ✓ | ✓ | |
| View all Sites | ✓ | ✓ | ✓ |
| Edit all Sites** | ✓ | ✓ | |
| Subscribe: Annual subscription | ✓ | ✓ | |
| Unsubscribe: Annual subscription | ✓ | ✓ | |
| View & export all transactions | ✓ | ✓ | ✓ |
| Upgrade to the new Rating Survey*** | | | |
| Change the Site contact | ✓ | | |
| Export a CSV file for all Sites | ✓ | ✓ | |

*Sites can't be deleted in 'payment pending' status or after they have been submitted for adjudication.

**Sites locked by the RHFAC Professional will be view only

***Only the RHFAC Professional can upgrade to the new version of the rating survey.

III. Accept a new User invitation

Accept an invitation to join an existing Organization as a new User.

When the email invitation has been received:

1. Click on the **Create account** link in the invitation email.
2. Complete the information and create your password.
3. Sign in to the RHFAC Registry. You are now ready to create a Site and start a new Rating.

IV. Register a Site

To start a Rating you must first create a Site.

To register a new Site:

1. Navigate to the RHFAC Registry and sign in.
2. From the **My Organization** page click on the **Register a Site** button on the top right.
3. Select the Rating type and click **Enter Site details**.
4. Complete the **Site details** form that opens and click on the **Review Site details** button. You can edit this information at any time. You do not need to select an RHFAC Professional at this time. If you have identified an RHFAC Professional, type the first letters of their name in the box and select them from the drop down.
5. Review the information you entered. Select Edit details at the bottom left if changes are required. If the information is correct click on **Continue**.
6. The Site will receive a complimentary one-year subscription to Rick Hansen Foundation Accessibility Certification™ (RHFAC) Subscription Program with the Registration Fee. Confirm you agree to the Terms of Service and click **Proceed to payment**.
You must click to open the Terms of Service before you can proceed.
7. Enter your payment information on the screen that follows.
8. On the payment confirmation screen click **Open Rating**.

V. Subscriptions

All Sites registered automatically receive a complimentary one-year subscription to the Rick Hansen Foundation Accessibility Certification™ (RHFAC) Subscription Program.

To cancel your subscription:

1. Login to your dashboard
2. Select the Site
3. Scroll down to the Subscription box and click Cancel my subscription.
This will remain active until one year from the Registration Fee payment.

To activate your subscription:

1. Login to your dashboard
2. Select the Site
3. Scroll down to the Subscription box and click Resubscribe now.
There is no additional cost if you reactivate within one year from the Registration Fee payment. If a year has lapsed, you will have to pay the Registration Fee again.

VI. Open the RHFAC Rating Survey

1. Navigate to the RHFAC Registry homepage and sign in.
2. From your Dashboard:
 - A. Navigate to the Sites page, select the Site, and open the Rating.
or
 - B. Navigate to the Ratings page, select the Rating, and click on **Open Rating**.

VII. Assign an RHFAC Professional

You can assign an RHFAC Professional at any time through one of the following options:

From the Site details form

Select your RHFAC Professional when you create the Site.

From the Organization dashboard

1. Select the Site and click the Edit Site details button on the top right.
2. Scroll down to select your preferred RHFAC Professional.
You may change the RHFAC Professional at any time using the same process.
Once the Rating is Adjudicated it will not be possible to make any changes.

VIII. Navigate the RHFAC Rating Survey

The RHFAC Rating Survey is an interactive tool you have full access to once you start a Rating.

i. Categories, elements, and features

- The survey is divided into Categories, Elements, and Features.
- Navigate in order using the next buttons on the top right of the page or use the left navigation bar to jump to any Category or Element of the Survey.
- Upload pictures for the Site by clicking on the upload button under the Element images. Pictures are uploaded for each specific Element to support the Features scored in that Category. Up to 30 may be added per Element.
- Use the Feature description and the design tip to gain a better understanding of the Rating Survey Categories, Elements, and Features.
- Points available for a Category, Element, or Feature marked as Not Applicable (N/A) will be removed from the total points available.
- You can assign an RHFAC Professional to your Rating at any time through any of the options outlined in **Section VII**.

ii. Not applicable (N/A)

To mark a Category, Element, or Feature as Not Applicable (N/A) click the green button marked Applicable on the category, Element, or Feature. It will turn grey to indicate the points in this section are no longer being counted.

iii. Rating Summary

The Rating Summary page is at the bottom of the left navigation bar.

This section can only be completed by the designated RHFAC Professional. They will provide a summary of the Site to reflect the successful areas as well as identifying areas that require improvement.

iv. Rating Score

Your Rating Score will update with each entry and will be visible in the following areas:

- **Total Score:** visible at the bottom of the left navigation bar.
- **Category and Element score:** visible on the right next to the title of the Category and Element.
- **Rating Outcome:** available through the left navigation, it provides a summary of your Rating Score by Category that updates with each new entry.

v. Export to CSV

To export your rating data:

1. Navigate to your Dashboard
2. From the My Organization page click on the **Export ratings for all sites** button.

This will export all rating data for all your sites in a CSV file.

vi. Working with an RHFAC Professional

You will retain access to the Rating until an RHFAC Professional locks the survey. The status at the top of the page will change to **Rating locked** to reflect that the Rating has now been locked.

Once the Survey is locked you will be able to continue to view the Rating, but you will no longer have access to edit.

When the Rating is ready for Adjudication, the RHFAC Professional will submit it and you will receive an email notification to complete the payment.

vii. Mark a Pre-Construction Rating complete

To mark a Pre-Construction Rating as complete:

1. Navigate to your Dashboard
2. From the Sites page open the Site.
3. Select the button **Complete construction**.
4. The Pre-Construction Rating for this Site will automatically expire. You may now start a new Rating for the built Site.

viii. Upgrade to the newest version of the RHFAC Rating Survey

There is an option to upgrade to the newest version of the RHFAC Rating Survey, if available. This action may only be taken by the RHFAC Professional.

To upgrade to the newest version of the RHFAC Rating Version:

1. Navigate to the Rating Survey page for the specific Rating.
2. Click on the **Actions** button in the top right.
3. Select **Change Rating survey version**.
4. Confirm this action in the pop-up menu that follows. This action will delete any data previously entered in the Survey.

ix. **Pay the Adjudication fee**

From the notification email:

- 1.** Navigate to the RHFAC Registry and sign in.
- 2.** From your Dashboard, navigate to the Site or Ratings page and select the Rating you wish to pay for.
- 3.** Complete the payment information on the screen that follows. If payment is successful, the Rating will be added to the Adjudicator Dashboard. The status will now change to Adjudication.

x. **Start a new Rating**

To start a new Rating on a Site that already has an Active Rating:

- 1.** Navigate to your Dashboard.
- 2.** From the Site menu page select the Site.
- 3.** Click on **Start a new Rating** on the top right. Confirm you would like to start a new Rating in the pop up that follows.

The previous Rating will remain Active until you receive an Adjudicated score for the new Rating.

xi. **Rating status**

The status of a Rating will change as it moves through the stages of the process. Table 2 has a list of the available statuses.

Table 2: Rating status

| Rating status | Description |
|--------------------------------------|--|
| Rating payment pending | A Site has been created but payment has not been completed. |
| Rating started | Both the Client and RHFAC Professional (if selected) have access to the RHFAC Rating Survey. |
| Rating locked | The RHFAC Professional has locked the survey. The Client can view only. |
| Adjudication payment required | Payment is pending for the Adjudication fee. |
| Adjudication | Payment is complete, and the Rating is being Adjudicated. |
| Revision requested | The Adjudicator has requested revisions. |
| Active | The Rating is complete and within the date of expiry. An active status applies to any Adjudicated Rating irrespective of score. |
| Expired | The certification expiry date has lapsed, and the Rating hasn't been renewed. |
| Archived | Deleted Ratings |

IX. Adjudicated Ratings

i. Download the Letter of Certification

When a Rating is complete, if it is RHF Accessibility Certified or RHF Accessibility Certified Gold, a Letter of Certification will be generated.

To download the Letter of Certification

1. Open your Dashboard and navigate to the Site or Ratings page.
2. Select the Site and open the Active Rating.
3. Click on the Download Letter of Certification button at the top of the page.

ii. List Publicly

To list the Rating result on the public facing pages of the registry:

1. Open your Dashboard and navigate to the Sites page and select the Site.
2. Click on the **List publicly** button on the top right of the page.
3. The information listed on the Site details page will be displayed as well as the Rating Score overview.

iii. Order Labels

To order labels for Sites that have achieved certification:

1. Open your Dashboard and navigate to the Sites or Rating page.
2. Select the Site and open the active Rating.
3. Click on the **Order labels** button at the top of the page.
4. Complete the information on the page that opens to create an order.



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