



Healthcare Credential Tracking

Template Set Getting Started Guide

With the Healthcare Credential Tracking template set, you can easily and effectively track and report the status of your staff's credentials, certifications, renewal dates, and other critical information.

Healthcare Credential Tracking

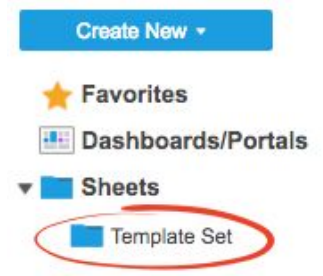
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REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. [Click here](#) to see a list of discontinued plans.

Get the Template Set

Click the link below and the template set will be added to your Sheets folder, you can find it on the left side of the screen under Sheets.

[Healthcare Credential Tracking Template Set](#)



What's Included in the Set

With the Healthcare Credential Tracking Template Set, you can easily and effectively track and report the status of your staff's credentials, certifications, renewal dates, and other critical information.

Missing Board Certificate Report

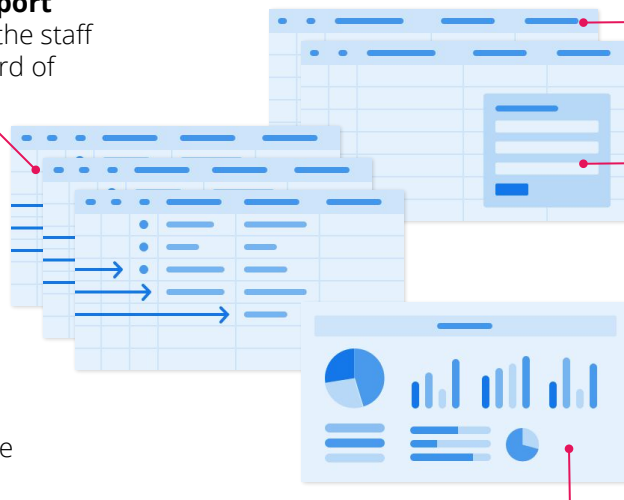
Is a live filter that displays all of the staff who have not given a copy/record of their board certification.

Missing CV Report

Is a live filter that shows who has a missing CV.

Missing School Certification Report

Is a running log of staff who have not logged their school information and NPI number.



Physician Information Sheet

Tracks and maintains all of your physician/health-care staff data and credentials.

Physician Credential Form

Allows your Healthcare providers (physicians, nurses, physician assistants, etc.) team members to submit their pertinent personal and credentialing information.

Metrics Sheet

A central repository that rolls up metrics across all missing documents and expiring accreditations.

Credential Tracking Dashboard

Is an overview of missing documents and expiring accreditations and a central location for key resources.

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Set Up



Using a [workspace](#) is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

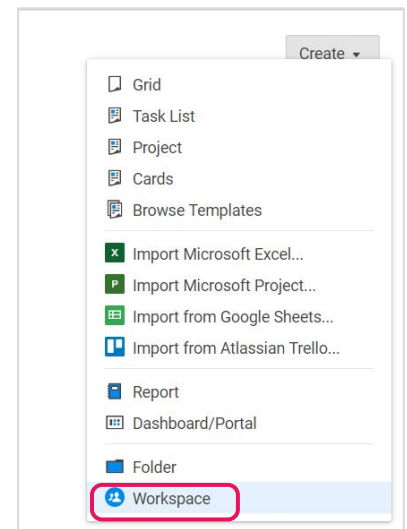
Step 1:

Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

Learn more:

[Workspaces Overview](#), [Workspace Sharing](#), [Home Tab](#)



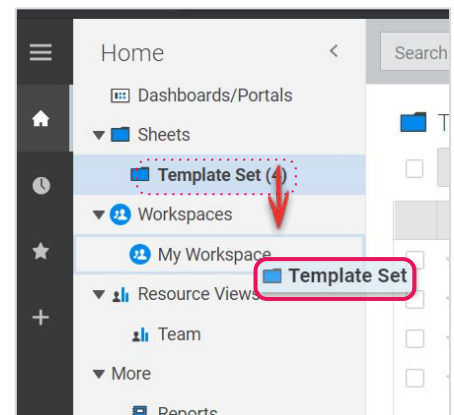
Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.

Learn more:

[Manage Items in a Workspace \(Add, Move, Remove\)](#)



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Customize

Step 3:

Modify Credential Tracking Dashboard

The Credential Tracking dashboard summarizes the key information in real-time that you want to track for your physician credentials. Dashboards consist of different widgets that pull in live information from other sheets and reports.

- Replace the logo placeholder with your own logo in the *Image* widget.
- Key Links is a *Shortcut* widget with links to your sheets and reports. Feel free to add a shortcut to other documents and resources.
- New Physician Entry Form and Physician Information Sheet are *Web Content Widgets* that embeds your form and sheet live in your dashboard.
- The Number of Missing Key Documents is a *Chart* widget that creates a column chart from your formulas in your Metrics sheet.
- The Accreditations Expiring Within 10 Days is a *Metric* widget that's pulling in live values from your Metrics sheet.
- Missing CV, Missing Board Certificate, Missing School Verification are *Report* widgets that display your live reports in the dashboard.

	Name	Email	Phone	Address
1	Baker, Carla W.	lobortis@auctorquiltristique.net	1-758-660-7860	537-8030 Ali
2	Bass, Mona T.	massa.Mauris.vestibulum@miac.net	1-627-512-0791	958-8615 Sc
3	Beach, Sydney G.	non@primisin.com	1-217-273-0491	742-9027 At
4	Benjamin, Ursula A.	egestas.urna.justo@faucibus.ca	1-888-893-7646	836-4004 In
5	Best, Mufutau S.	Cras@Aeneaeuismod.net	1-688-332-4276	550-3383 Oc
6	Bowen, Vivian M.	mauris.blandit@enim.ca	1-527-344-0093	979-6863 Ve
7	Bradshaw, Adria Z.	nec.urna.auscipit@congue.net	1-318-584-2744	Ap #179-678
8	Bright, Reed O.	dis@Fusedolor.co.uk	1-540-790-6859	Ap #107-612
9	Brooks, Julian E.	eu@suscipitest.edu	1-345-950-1003	7818 Dolor.!
10	Buck, Michelle E.	lobortis@ProinultricesDuis.com	1-424-313-9599	Ap #983-105
11	Camacho, Nasim E.	arcu.Nunc.mauris@luctus.edu	1-675-354-1474	P.O. Box 922

Learn more:

[Make Changes to an Existing Dashboard](#), [Viewing and Sharing a Dashboard](#), [Widget Types for Smartsheet Dashboards](#), [Metric Widgets](#), [Chart Widgets](#), [Embed Enabled Web Content](#)

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Step 4:

Manage the Physician Information Sheet

The Physician Information sheet is where you will track information about your physicians and their licensing and certification.

- A. Add or delete any columns to accommodate your team’s unique process: right-click on any column and select “*Edit column properties*” or “*Delete*”. Delete out current rows of data, as they are just examples.
- B. Attach other files such as a PDF, Word document, or other documentation related to the physician in the *Attachments* (paperclip) column.
- C. An automated alert workflow has already been set on this sheet to notify anyone shared to the sheet when a new row has been added. To view or edit the alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu. Then double click on the New Physician Notification workflow in order to open the editor window. To enable the alert, click on the dropdown menu and select *Enable*.

		Name	Email	Phone	Fax	Address	City	State	Zip
1		Baker, Carla W.	lobortis@auctorquistristique.net	1-758-660-7860	1-884-976-7565	537-8030 Aliquet, Street	Gillogjan	Nebraska	
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3		Beach, Sydney G.	non@primisin.com	1-217-273-0491	1-723-865-0848	742-9027 At Ave	Bancar	Colorado	
4		Benjamin, Ursula A.	egestas.urna.justo@faucibus.ca	1-888-893-7646	1-850-432-8188	836-4004 In Avenue	Guzhen	Missouri	
5		Best, Mufutau S.	Cras@Aeneaneuismod.net	1-688-332-4276	1-854-521-1587	550-3383 Odio, St.	JÅrkrat ash ShamÅh	Texas	
6		Bowen, Vivian M.	mauris.blandit@enim.ca	1-527-344-0093	1-809-582-9630	979-6863 Vestibulum Rd.	Seia	Florida	
7		Bradshaw, Adria Z.	nec.uma.suscipit@congue.net	1-318-584-2744	1-936-567-3752	Ap #479-6786 Dictum Rd.	Kagawasan	New York	
8		Bright, Reed O.	dis@Fuscedolor.co.uk	1-540-790-6859	1-435-800-9060	Ap #107-6121 Erat, Rd.	Garanhuns	Florida	
9		Brooks, Julian E.	eu@suscipitest.edu	1-345-950-1003	1-230-281-0959	7818 Dolor, St.	San Pedro de MacorÅs	Texas	
10		Buck, Michelle E.	lobortis@ProinultricesDuis.com	1-424-313-9599	1-675-807-8935	Ap #983-1053 At, Avenue	MiaoÅtÅergou	Colorado	
11		Camacho, Nasim E.	arcu.Nunc.mauris@luctus.edu	1-675-354-1474	1-547-408-5033	P.O. Box 922, 3547 Et Rd.	Pittsburgh	California	
12		Casey, India B.	Praesent.linterdum@tempusnonlacinia.co.t	1-769-261-6890	1-363-786-7064	P.O. Box 634, 9223 Lorem Rd.	Pezza Madhe	Arizona	
13		Cochran, Ramona Y.	in.faucibus@Nullamenim.co.uk	1-327-763-5405	1-462-374-7683	125-4849 Egestas, Ave	Angkahgede	District of Columbia	
14		Coffey, Chase G.	est@aliquet.ca	1-521-422-8158	1-370-587-1044	Ap #416-6909 Donec Rd.	JiÅ,ÅAnah	Texas	
15		Compton, Rinah P.	Donec.fringilla.Donec@Fuscemilorem.org	1-183-144-7640	1-572-409-0414	P.O. Box 173, 5553 Eu Ave	Fuzihe	New York	
16		Cortez, Courtney Y.	cursus.et.magna@metusAliquam.net	1-710-500-6733	1-161-819-2212	P.O. Box 396, 7982 Eget Ave	Sanyantang	New Jersey	

Learn more:

[Use the Best Column Type for Your Data](#), [Save Time and Work Faster With Automated Workflows](#), [Managing Contacts](#)

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Step 5:

Sheet Bonus: View or Edit Your Project Summary Data

For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The Physician Information with Form sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of what documents are missing and which are expiring in the next 10 days. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

- Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.
- To add fields, click +New Field.
- Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.
- To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.

	Address	City
76-7565	537-75030 Aliquet, Street	Ho
54-5843	9575-75615 Sollicitudin Road	Pa
65-0848	742-9027 At Ave	As
32-8188	7536-4004 In Avenue	M
21-1587	550-33753 Odio. St.	Fr
82-9630	979-67563 Vestibulum Rd.	Le
67-3752	Ap #479-67756 Dictum Rd.	Sp
00-9060	Ap #107-6121 Erat. Rd.	Le
81-0959	775175 Dolor. St.	Fr
07-8935	Ap #9753-1053 At, Avenue	As
08-5033	P.O. Box 922, 3547 Et Rd.	Le
86-7064	P.O. Box 634, 9223 Lorem Rd.	Pi
74-7683	125-47549 Egestas. Ave	W
87-1044	Ap #416-6909 Donec Rd.	Fr
09-0414	P.O. Box 173, 5553 Eu Ave	Sp
19-2212	P.O. Box 396, 79752 Eget Ave	Ol
83-2460	P.O. Box 215, 2065 Massa. Street	Ca
13-6497	393-3273 Suspendisse Avenue	Le
09-6950	P.O. Box 573, 1574 Neque. Avenue	Ca

Sheet Summary

[Please provide feedback](#)

WHAT IS SHEET SUMMARY?

Sheet Admins can define, organize, and report on critical information in this sheet with Sheet Summary such as team contacts, metrics, and deadlines.

Total Missing Documents: Hospital Privileges *f(x)*

9

Total Missing Documents: License Verification *f(x)*

7

Total Missing Documents: DEA Certification *f(x)*

6

Total Missing Documents: BLS Certification *f(x)*

6

Total Missing Documents: ACLS Certification *f(x)*

5

[+ New Field](#)

Learn more:

[Define Your Work with Sheet Summary](#), [Maximize Your Sheet Summary Usage](#), [Create a Portfolio View with a Summary Report](#)

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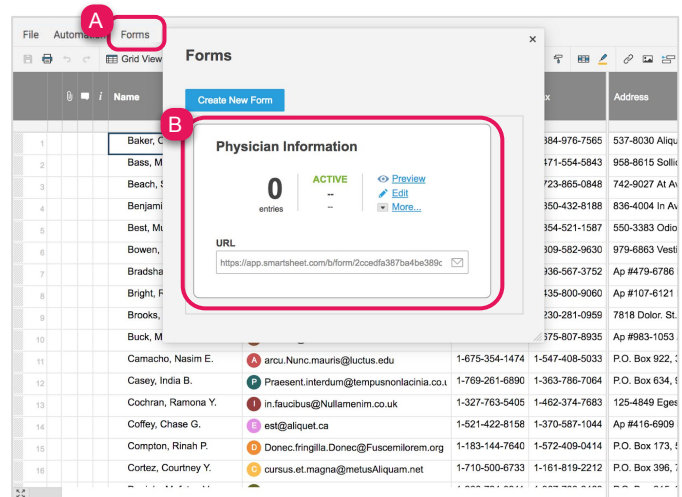
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Step 6:

Modify the Physician Information Form

The Physician Information form can be shared with your physicians so that they can easily submit their credential information. Submissions are then added to the Physician Information sheet where you can track and maintain credential records.

- A. Customize the form by first opening the Physician Information sheet and clicking on *Forms* in the top menu.
- B. Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify *Form Options*.
- C. Hit *Save* to close the form builder and copy and save the URL displayed. This URL is what you'll give to physicians who will be submitting their information.



Learn more:

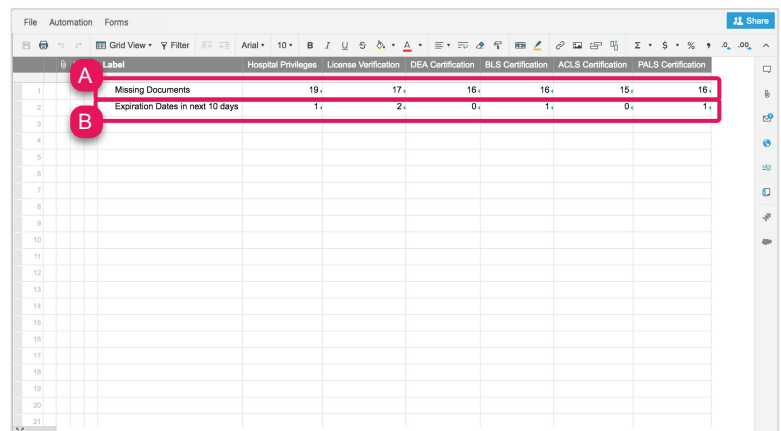
[Forms](#), [Edit Existing Form Fields](#)

Step 7:

Metrics Sheet

The Metrics sheet is a central repository where metrics you want to track are rolled-up. We've designed this sheet with cross-sheet formulas so the metrics always reflect, in real-time, the information in the underlying sheets.

- A. One formula counts the number of missing documents by document type. For example: `=COUNTIF({Hospital Privi 1}, 0)` counts the number of missing documents in the Hospital Privileges column.
- B. Another formula counts expiration dates in the next 10 days: `=COUNTIFS({Hospital Priv 2}, <=TODAY(10), {Hospital Priv 2}, >TODAY())`



Learn more:

[Cross-sheet Formulas](#)

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Step 8:

Get a Custom View with Reports

Reports allows you to create custom views of staff missing their board certificate, CV, or school verification. In the template set, you'll find three reports (Missing Board Certificate, Missing CV, Missing School Verification), but you can create more to track other missing data by duplicating an existing report. Reports are bi-directional, which make it easy to update and manage data from one filtered view. These live reports are included on the Certificate Tracking Dashboard, so any changes made will also be reflected there.

- A. To modify the report, open the Report Builder in the desired report.
- B. Change *What?* to the desired criteria.

The screenshot shows the Smartsheet interface with a spreadsheet in the background. The spreadsheet has columns for 'School Verification Attached?', 'NPI #', and 'Name'. A 'Report Builder' window is overlaid on the spreadsheet. The window has a title bar with a question mark and a close button. Below the title bar, it says 'Matching rows found: 2' and 'Not sorted.' There are two buttons: 'Run' and 'Columns'. Below this, there are four filter sections: 'Where?', 'Who?', 'What?', and 'When?'. The 'Where?' section has a 'Restrict to:' dropdown set to '1 sheets in scope' and a checkbox for 'Physician Information'. The 'Who?' section has a text box: 'Click Who button to report against a Contact List column.' The 'What?' section has a text box: 'School Verification Attached? is not checked'. The 'When?' section has a text box: 'Click When button to report against a Date column.' There are 'and' buttons between the 'Who?' and 'What?' sections, and between the 'What?' and 'When?' sections. A red box labeled 'A' highlights the 'Report Builder' button in the top toolbar. Another red box labeled 'B' highlights the 'What?' filter section.

Learn more:

[Build a Report](#)

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Step 9:

Customize the Dashboard

Provide a central location for your management team to track missing information and get a quick overview of the most important statistics and status all in one place. Easily customize the dashboard to include your physician credential resources by editing Key Links in the Shortcut widget. Embed your New Physician Entry form and Physician Information Sheet directly in the dashboard so your team can easily access the information you need to keep everyone on the same page.

- Click *Edit*, to start editing the dashboard.
- Hover over the New Physician Entry Form widget and a widget options menu will appear at the bottom right corner.
- Click *Edit* (pencil icon) to replace the example form URL.
- Click *Select URL* and paste your new form URL. Click OK to load the form.
- Click *Done* when you've confirmed the content replaced the example content.
- Repeat steps for replacing other web content widgets in the dashboard.

The screenshot shows the 'Credential Tracking' dashboard for 'Health Care - FY19'. The dashboard includes a 'Key Resources' section with two embedded widgets: 'New Physician Entry Form' and 'Physician Information Sheet'. A 'Key Links' section is visible in the top right. Below the widgets is an 'Accreditation Documents' section with a bar chart titled 'Number of Missing Key D' and a summary of certifications: BLS Certification (1), ACLS Certification (0), PALS Certification (1), Hospital Privileges (1), DEA Certification (0), and License Verification (2). Annotations A-F highlight the steps to edit a widget: A points to the 'Edit' button in the top left; B points to the 'New Physician Entry Form' widget; C points to the 'Edit' (pencil) icon in the widget's options menu; D points to the 'Select URL' button in the 'Edit Web Content widget' dialog; E points to the URL input field in the dialog; and F points to the 'Done' button in the dialog.

Learn more:

[Make Changes to an Existing Dashboard](#), [Viewing and Sharing a Dashboard](#), [Widget Types for Smartsheet Dashboards](#), [Metric Widgets](#), [Embed Enabled Web Content](#)

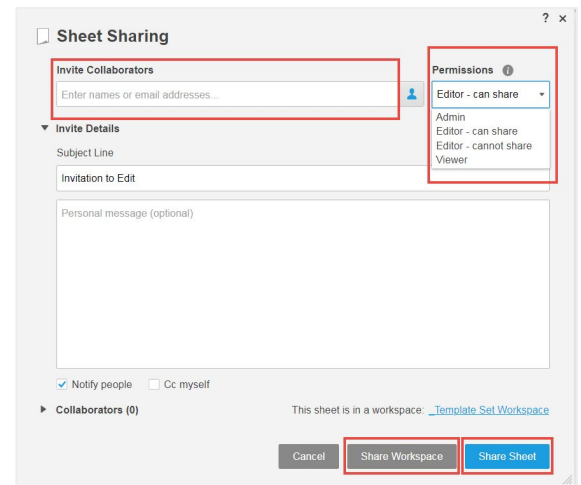
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Step 10:

Share Your Healthcare Credential Tracking Template Set

Sharing is the best way to collaborate with others involved in your staff management tracking process. You can share your entire workspace with members of your department, or you simply share individual items within the workspace. For more information on sharing and permission levels, check out this [infographic](#).



Learn more:

[Workspace Sharing](#)