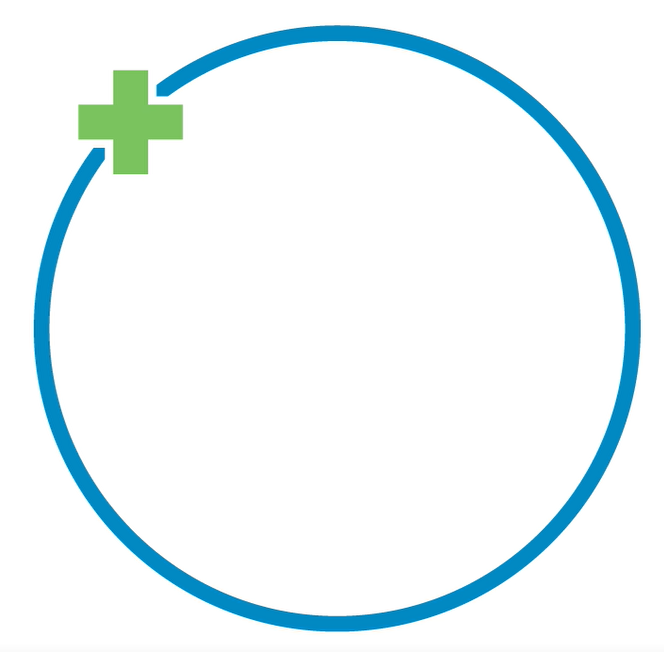
FETCH

USER GUIDE



***Great medicine starts with great teams***

Last Updated: April 2022

**User Guide Version Log – Updates**

|  |  |
| --- | --- |
| **Version** | **Updates** |
| **2** | Apps   * Pricing Guide: newly added * Directory: improved structure of information plus pictures * Team Scheduler/Team Time: renamed * IT & Facilities Request: added setup instructions for ZenDesk   CareVet News & Alerts   * News & Updates priority indicator and notification of unread messages * Notifications pane added |

**Table of Contents**

**How to use this document:**

* If you only have a few minutes and want to start using Fetch now, read the Quick Start Guide
* The technology is designed to be user-friendly and intuitive but reference each chapter to get a comprehensive understanding of all it has to offer
* Fetch is a proprietary software application; we are making continuous improvements and will update this guide highlighting those enhancements, when released (see what has changed in the Version Log on the prior page)
* To access additional training resources and for additional help, contact [FetchHelp@carevethealth.com](mailto:FetchHelp@carevethealth.com)

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[Team Scheduler (In Depth) 17](#_Toc100930786)

[CareVet News & Alerts 22](#_Toc100930787)

# A doctor holding a dog Description automatically generated with medium confidenceIntroduction to Fetch

**Chapter**

**1**

**What is it?**

A hospital manager’s daily home page for all things CareVet.

Our proprietary technology platform that puts the information and tools at a hospital’s fingertips to help run the business effectively.

Part of CareVet’s commitment to empowering our hospital leaders and supporting them with the best tools and technology in the industry.

**Who is it for?**

All CareVet Hospital Managers

**Why should I use it?**

***Centralize and streamline communications with HQ***

* Reduce Emails
* Your Daily Home Page

**CareVet News & Alerts**

***Put all my CareVet tools and resources in one spot***

* Application Library
* Custom Team Scheduler
* Automated Notifications

**Applications**

***Help me understand my hospital’s performance***

* KPIs
* Goals
* Reporting

**Metrics**

# A doctor holding a dog Description automatically generated with medium confidenceQuick Start Guide

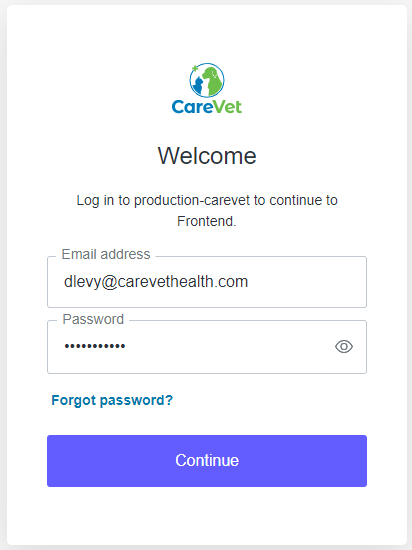
**Chapter**

**2**

*Get up to speed on the most critical features so that you can start using Fetch right away*

## Login & Setup

1. Go to [carevet-fetch.com](https://linkprotect.cudasvc.com/url?a=http%3a%2f%2fcarevet-fetch.com%2f&c=E,1,DLLZmD_vMkGNXv9DDrfO3uowAwggNAjNwjG0f3I8Ea0SrJngKPCj-EJngWvbiYmCfmpuf004NVR5qfRlOAYUIu4CD0voBWEq-Mzhkc1bf6AAPzn8vD_13mCsS9k,&typo=1)
2. Login with your email address and this temporary password: **Carevet123!**



1. Create a custom password
   1. After successfully logging in, log back out and return to the login screen (carevet-fetch.com)
   2. Create your own custom password by clicking "forgot password" on the login screen
   3. Enter your email address, click “continue” and you will receive instructions to reset your password via email
   4. In the email that you receive from noreply@carevethealth.com, click “confirm” and then create/enter your desired password.



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**3b**

* 1. Then return to carevet-fetch.com and login using your email address and the password you just created.

***Best practice: once you’re logged in, save carevet-fetch.com as the home page of your web browser!***

Fetch is a web application and will automatically remember your login information, so you won’t have to enter it again unless you log out.

Here is a link to instructions for how to save Fetch as your home page in common browsers (Chrome, Safari, Edge, Firefox, Internet Explorer, Opera): <https://www.lifewire.com/set-homepage-3483132>

If you need help setting your home page or viewing the dashboard in your browser, contact **tmettler@carevethealth.com**

## Dashboard Orientation

1. **KPIs:** View progress towards your goals each month and access support resources
2. **CareVet News and Alerts:** receive regular updates, announcements, and articles from CareVet HQ
3. **Apps:** access each application directly from this dashboard by clicking on its button

*Graphical user interface, application, website

Description automatically generated*



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**2**



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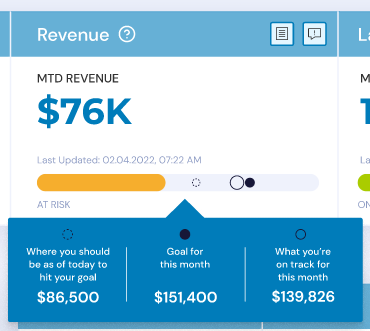
**1**



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**3**

## KPI Basics



These are the four operational KPIs that have an associated hospital manager bonus, every month.

At the end of the month, if all four metrics are “green,” you have met all your monthly goals and you’ll get your maximum bonus!

If you are not where you would like to be on a particular metric, click the “Help Me” button to access Playbooks and other CareVet support resources.

View additional detail by clicking the “Reports” button, with useful data to let you dig deeper into each KPI.

## Apps & Notifications

*Graphical user interface

Description automatically generated*The Apps section is your all-in-one CareVet toolkit; each button links directly to an application

1. Some buttons might have a red number inside; these are “live” notifications, indicating that something inside of that application requires your attention; click on the number to view detail



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**1**

Below is your current App library and basic information on each application. This library will be expanded, from time to time, as we equip you with additional tools and resources.

|  |  |  |  |
| --- | --- | --- | --- |
| **Application Name** | **What it is** | **How to use it** | **Who to ask for help** |
| **Client Services** | | | |
| A picture containing text  Description automatically generated | Client engagement tool that allows you to streamline communication, spend less time on the phone and build stronger relationships with your pet parents | Provide digital app for your clients, automated health services reminders (via email, text and postcards), automated appointment reminder, 2-way text, loyalty programs | [eehll @carevethealth.com](mailto:eehll@carevethealth.com) |
|  | Downloadable reference guide for pricing of drugs, services and fees, including recommended levels for your hospital | When considering pricing for your hospital’s services, use this tool to view where you are above, at or below market to identify potential opportunities | pricing@  carevethealth.com |
| **People** | | | |
|  | Custom scheduling tool where you can build your team schedule based on expected revenue and plan to reach your productivity score goal | Create/edit team member shifts and view impact on planned productivity score, in real-time | [ProductivityScore @carevethealth.com](mailto:ProductivityScore@carevethealth.com) |
| A picture containing text  Description automatically generated | Your comprehensive HR and payroll system | Recruiting, people development, payroll, timecards, benefit management and employee information | [CareVetPeopleCulture@carevethealth.com](mailto:CareVetPeopleCulture@carevethealth.com) |
|  | Your platform for accessing CareVet Learning Institute assignments, training modules, and RACE Approved courses for CE credits | Develop your team members’ clinical skillsets through custom learning paths and training programs. | [rhartman @carevethealth.com](mailto:rhartman@carevethealth.com) |
|  | How to initiate important team-related requests with CareVet People & Culture | Requests for new job posting, status/hours/pay change, termination, workers compensation, leave | [CareVetPeopleCulture@carevethealth.com](mailto:CareVetPeopleCulture@carevethealth.com) |
| **Purchasing** | | | |
|  | Proprietary online shopping experience for you to purchase the products you need with a fully integrated “procure to pay” system. | Purchase products you need in-hospital and see real-time budget tracking. | [procurement @carevethealth.com](mailto:procurement@carevethealth.com) |
|  | Tool for you to supplement your hospital online. Offer your clients products you don’t offer in-hospital and additional/follow-up doses after purchasing in-hospital. | You or your clients can purchase products that your clients need that you don’t offer in-hospital or they need at later date. | [procurement @carevethealth.com](mailto:procurement@carevethealth.com) |
|  | Zendesk request/ticketing platform for any facility or IT needs | Submit facility and/or IT requests to the appropriate contact through this online portal. The first time you click this button, click “Sign Up” to create a personal account. | [tmettler @carevethealth.com](mailto:tmettler@carevethealth.com) |
| **CareVet Info** | | | |
|  | Library where you can access all CareVet JotForms | View, complete and submit JotForms for various HQ requests | [CareVetPeopleCulture@carevethealth.com](mailto:CareVetPeopleCulture@carevethealth.com) |
|  | Contact information for key teams & individuals across the organization | View and search contacts based on name, role and team | [FetchHelp @carevethealth.com](mailto:FetchHelp@carevethealth.com) |
|  | A place to communicate and collaborate with all members of the CareVet network | Share your experiences, fun photos, questions and everything in between to get to know others at CareVet! | [rhartman @carevethealth.com](mailto:rhartman@carevethealth.com) |

## Team Scheduler Basics

* Click the “Team Schedule” button in the Apps section
  + Note: Team member settings and profile information are maintained in Paycor; to get the most out of your scheduler, be sure to have your team members **upload their photos** to their scheduler profile in Paycor
* Build your team schedule and view your planned Productivity Score, based on expected revenue and scheduled hours; adjust your schedule as needed to achieve your desired Productivity Score
  + Productivity Score = Revenue ÷ Non-DVM Hours (excluding boarding and grooming)
    - Note: for a detailed explanation for how Productivity Score is calculated and how to improve your score, reference the Productivity Score playbook located behind the labor “Help Me” button Icon

      Description automatically generated on the home dashboard
  1. To add a shift, click the blue Icon

     Description automatically generated button in the bottom right corner

A picture containing text

Description automatically generated



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**1**

Graphical user interface, application

Description automatically generated

* 1. Enter the relevant details in the “Create a Shift” pane and click “Save”

Repeat this process as many times as is required to build your complete team schedule (including Doctors)

To edit a shift, click on the shift you wish to modify and the same details will pop up again, which you can then make adjustments to

When you are satisfied with your schedule and planned productivity score, click “Publish Schedule” in the top right corner of the screen and it will automatically load the schedule you have built into Paycor



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**2**

# A doctor holding a dog Description automatically generated with medium confidenceKPIs

**Chapter**

**3**

*Learn the numbers! Which metrics matter, how to use them, and how to improve your “scores.”*

## KPIs Defined

**Client Services: MTD (Month-do-date) Net Promoter Score**

* A measure of clients' overall satisfaction with your hospital’s service and their loyalty to your business, this month. This data comes from Pet Desk.

**Revenue: MTD (Month-do-date) Revenue**

* Dollar amount of all products and services sold to clients, this month. This data comes from VetSuccess. Note: the figure shown here excludes online pharmacy sales.

**Labor: MTD (Month-do-date) Productivity Score**

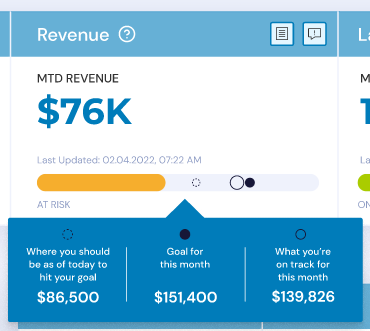
* Revenue ÷ Non-DVM Hours. Measures how well the team schedule (i.e. hours) is aligned with client demand (i.e. revenue), this month. This data comes from Paycor and VetSuccess.

**COGS: MTD (Month-do-date) BAPS Spend**

* Measures the dollar amount of supplies purchased through your online purchasing portal, this month. This data comes from BAPS/VetCove.

## Goals and Status

The color of the bar indicates progress towards your monthly goal, for each metric. **Green** = on track, **Orange** = at risk for missing your goal, **Red** = off track.



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**1**

1. **Status detail:** hover your cursor over the status bar to view an explanation of each circular icon
   1. “*where you should be as of today to hit your goal”* – based on how far into the month we are, this is what we would expect the big blue(MTD) number to be in order for you to hit your monthly goal
   2. *“goal for this month” –* monthly goal for your hospital; reference each KPI playbook for the full detail behind how these are determined
   3. *“what you’re on track for this month”* – based on your progress so far this month, this is where you can expect to land at the end of the month

## Help Me!

1. **“Help Me” Resource**: click on the  “Help Me” button in the top right corner of each KPI box to access support resources
   1. Access the KPI Playbook for a comprehensive guide for additional context behind the metric, how it relates to your monthly bonus, and strategies to score better
   2. If you can’t find what you’re looking, get in touch directly with the team of CareVet experts, who would love to help
   3. Toggle between resources for any of the four metrics, directly from this screen

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**1b**



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**1c**

## Reporting (Coming Soon! – April ’22)

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Click the  button next to each KPI header to access a basic reporting package that allows you to drill down into more detail



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**1a**

Past performance by month, week and day with a breakdown of performance drivers

Below is a list of current reports for each KPI, and what you will find in each one

**Client Services:**

* Historical NPS by month
* Average star rating across key platforms (Facebook, Google, Yelp)
* Customer review counts

Chart, line chart

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**Revenue**

* Chart, histogram

  Description automatically generatedVolume and Revenue per Patient – view by month, week, day
* Revenue by category – view by month, week, day

Chart, bar chart

Description automatically generated

* Graphical user interface

  Description automatically generated with medium confidenceRevenue bridge – view % change by category between any two time periods to see major growth drivers (for example, year-over-year)

**Labor**

* Chart, line chart

  Description automatically generatedProductivity Score Overview – view by month, week, day and compare year-over-year
* Productivity Score Detail – view revenue and hours to better understand performance; for example, if you missed your goal and/or plan month, was it due to revenue or hours?

Table

Description automatically generated

**COGS**

* Spend by category – view by month, week, day

Chart, bar chart

Description automatically generated

# A doctor holding a dog Description automatically generated with medium confidenceApplications

**Chapter**

**4**

*Access CareVet’s Hospital Manager toolkit and learn about important workflows*

## Application Library

Below is your current App library and basic information on each application. This library will be expanded, from time to time, as we equip you with additional tools and resources.

|  |  |  |  |
| --- | --- | --- | --- |
| **Application Name** | **What it is** | **How to use it** | **Who to ask for help** |
| **Client Services** | | | |
| A picture containing text  Description automatically generated | Client engagement tool that allows you to streamline communication, spend less time on the phone and build stronger relationships with your pet parents | Provide digital app for your clients, automated health services reminders (via email, text and postcards), automated appointment reminder, 2-way text, loyalty programs | [eehll @carevethealth.com](mailto:eehll@carevethealth.com) |
| Text  Description automatically generated with medium confidence | Downloadable reference guide for pricing of drugs, services and fees, including recommended levels for your hospital | When considering pricing for your hospital’s services, use this tool to view where you are above, at or below market to identify potential opportunities | pricing@  carevethealth.com |
| **People** | | | |
|  | Custom scheduling tool where you can build your team schedule based on expected revenue and plan to reach your productivity score goal | Create/edit team member shifts and view impact on planned productivity score, in real-time | [ProductivityScore @carevethealth.com](mailto:ProductivityScore@carevethealth.com) |
| A picture containing text  Description automatically generated | Your comprehensive HR and payroll system | Recruiting, people development, payroll, timecards, benefit management and employee information | [CareVetPeopleCulture@carevethealth.com](mailto:CareVetPeopleCulture@carevethealth.com) |
|  | Your platform for accessing CareVet Learning Institute assignments, training modules, and RACE Approved courses for CE credits | Develop your team members’ clinical skillsets through custom learning paths and training programs. | [rhartman @carevethealth.com](mailto:rhartman@carevethealth.com) |
|  | How to initiate important team-related requests with CareVet People & Culture | Requests for new job posting, status/hours/pay change, termination, workers compensation, leave | [CareVetPeopleCulture@carevethealth.com](mailto:CareVetPeopleCulture@carevethealth.com) |
| **Purchasing** | | | |
|  | Proprietary online shopping experience for you to purchase the products you need with a fully integrated “procure to pay” system. | Purchase products you need in-hospital and see real-time budget tracking. | [procurement @carevethealth.com](mailto:procurement@carevethealth.com) |
|  | Tool for you to supplement your hospital online. Offer your clients products you don’t offer in-hospital and additional/follow-up doses after purchasing in-hospital. | You or your clients can purchase products that your clients need that you don’t offer in-hospital or they need at later date. | [procurement @carevethealth.com](mailto:procurement@carevethealth.com) |
|  | Zendesk request/ticketing platform for any facility or IT needs | Submit facility and/or IT requests to the appropriate contact through this online portal. The first time you click this button, click “Sign Up” to create a personal account. | [tmettler @carevethealth.com](mailto:tmettler@carevethealth.com) |
| **CareVet Info** | | | |
|  | Library where you can access all CareVet JotForms | View, complete and submit JotForms for various HQ requests | [CareVetPeopleCulture@carevethealth.com](mailto:CareVetPeopleCulture@carevethealth.com) |
|  | Contact information for key teams & individuals across the organization | View and search contacts based on name, role and team | [FetchHelp @carevethealth.com](mailto:FetchHelp@carevethealth.com) |
|  | A place to communicate and collaborate with all members of the CareVet network | Share your experiences, fun photos, questions and everything in between to get to know others at CareVet! | [rhartman @carevethealth.com](mailto:rhartman@carevethealth.com) |

For third party applications, detailed training can be found on those websites. If you have trouble locating them, always feel free to reach out to [FetchHelp@carevethealth.com](mailto:FetchHelp@carevethealth.com)

## Notifications

When an application has a red number inside its button; this indicates an “active” notification that something inside of that application requires your attention; click on the number to view detail.

You can also view a list of all active notifications by selecting the “Notifications” option under CareVet News & Alerts

Here are the current notifications, by application:

|  |  |
| --- | --- |
| **Application** | **Notification** |
| Text  Description automatically generated with low confidence | 1. When your team schedule for next week has not been built yet 2. When there is a significant variance between the number of hours scheduled and worked over the past week |
| A picture containing text  Description automatically generated | *COMING SOON (MAY 2022)* |
|  | *COMING SOON (MAY 2022)* |
|  | *COMING SOON (MAY 2022)* |

## Team Scheduler (In Depth)

***Click on Text

Description automatically generated with medium confidence to build your team schedule and view your planned Productivity Score, based on scheduled hours and expected revenue; adjust your schedule as needed to achieve your desired Productivity Score.***

***This chapter has three sections:***

1. ***Navigate the scheduler***
2. ***Create and edit shifts***
3. ***Use the reference metrics***

**Navigating the scheduler**

* As a reminder: Productivity Score = Revenue ÷ Non-DVM Hours (excluding the kennel and certain other hours)
  + For a comprehensive explanation for how Productivity Score is calculated and how to improve your score, reference the Productivity Score playbook located behind the labor “Help Me” button Icon

    Description automatically generated on the home dashboard
* Note: Individual team member profile information and settings are maintained in Paycor; log into Paycor to update any team member profile data such as scheduling criteria/availability
  + To get the most out of your Fetch scheduler, be sure to have your team members upload their photos to their scheduler profile in Paycor

1. Toggle between dates
   1. Select a daily, weekly or monthly view using the toggle in the top left of the page
   2. Scroll chronologically between days, weeks or months using the buttons across the top
   3. Jump straight to a specific date using the calendar button in the top right corner
2. In the weekly view, sort shifts according to role, person, scheduled department, or time
3. Click the “Back to Dashboard” in the top left corner to navigate back to the dashboard at any time
4. If you are responsible for more than one hospital, toggle between hospitals using this  arrow

A screenshot of a computer

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**4**



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**1c**



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**1b**

**How to create and edit shifts**

1. To add a shift, click the blue Icon

   Description automatically generated button in the bottom right corner

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**1**

1. Enter the relevant details in the “Create a Shift” pane and click “Save”

* Graphical user interface, application

  Description automatically generated**Date:** pre-populates for the selected day (or Monday, if in weekly view); you can select a different day by clicking the calendar icon 
* **Start and End Shift:** select times
* **Role:** select the team for which you would like to schedule the shift
* **Assignee:** select a team member; these dropdown options will be pre-filtered based on the “role” selected
* **Department:** select the department to which you would like to schedule the shift; some individuals can be scheduled to multiple departments. For example, if a tech assistant will see appointments for half the day and work front desk the other half, you can create two shifts: one in the Tech Assistant department, and the other to the Receptionist department. If you have questions about adding additional departments to an individual’s scheduling criteria in Paycor, contact [CareVetPeopleCulture@carevethealth.com](mailto:CareVetPeopleCulture@carevethealth.com).



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**2**

* + Note: certain departments are excluded from Productivity Score calculations:
    - Veterinarians
    - Kennel
    - Secret Shopping: pricing research in markets across the US, on behalf of HQ
    - Learning & Development: required CE, dental training, and the Emerging Leaders program. CVLI hours should not be coded to this department—Fetch will automatically removes those hours from your actual productivity score
    - Inventory: time spent completing HQ-requested inventory counts
* **Breaks:** if desired, add one or multiple breaks to the shift, specifying the start time and duration; if unpaid, break time will not count against productivity score
* **Recurring Shifts:** if this person works the same shift with some regularity, use this feature to automatically replicate it into the future
  + Select the days of the week that this shift should be replicated for
  + Select the end date, through which the shift will be repeated

To edit a shift, click on the box you wish to modify; the shift details will pop up again, which you can then adjust.

* If the shift that you would like to edit was originally created as part of a series of recurring shifts, you have the option to then select whether you would like to edit that single shift, all future shifts in the series, or all shifts in the series both past and present.

Repeat this process as many times as is required to build your complete team schedule.

When new shifts are first created, they will be considered in “draft” form; this is indicated by a yellow border around the shift box. This allows you to view your productivity score based on the schedule, before officially publishing it to your team.

**When you have finished building or editing the schedule, be sure to click the Text

Description automatically generated button in the top right corner of the screen and it will automatically load the schedule you have built into Paycor.**

1. Create and apply schedule templates
   * 1. In the top right corner of the scheduler, click on the A picture containing diagram

        Description automatically generated icon to manage templates
     2. To save the schedule you have built as a new template, which you can apply to future time periods, select “Save as Template.” Give the template a name, select the date range that you would like to save, and select whether you would like to save the template with or without staff names. If you save it without staff names, you can always assign/change names by editing each shift, in the future.
     3. To apply a template that you have created to a future time period, select “Apply Template.” Select the desired template from the dropdown menu, which “start date” you wish to assign as the first day for the applied template
        1. The box “enforce availability and schedule limits” is automatically checked; this makes sure that if the template being applied creates a conflict with someone’s PTO or holiday, it creates an “open shift” that will need to then be assigned to a different person
        2. If the template that you have applied includes an assigned shift for an individual that overlaps with another shift they already have on the schedule, that shift applied via the template will be created as an “open shift”; you can then edit (such as assign a different individual) or delete that specific shift

Graphical user interface, application

Description automatically generatedGraphical user interface, application

Description automatically generatedGraphical user interface, application

Description automatically generated



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**3a**



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**3c**



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**3b**

**How to use the metrics (5 important numbers)**

1. Full month planned productivity score
   1. Projected productivity score for the month; calculated based on actual revenue and hours worked to-date, plus expected revenue and scheduled hours through month-end
   2. From within the scheduler, reducing the number of hours scheduled for the month will increase your planned score
   3. This number is also represented on the main dashboard by the “what you’re on track for this month” icon: **○**
2. Month-to-date actual productivity score
   1. Calculated based on actual revenue and hours worked so far this month (with the appropriate exclusions for productivity score calculations)
   2. This number is also the big blue number on your main dashboard
3. Week-to-date variance (worked vs. scheduled)
   1. How many hours your team has worked versus what was scheduled so far, this week
   2. A **green** number (negative variance) means the team worked fewer hours than what was scheduled; a **red** number (positive variance) indicates an overage
4. Weekly plan variance (scheduled vs. goal)
   1. Number of hours above or below what you should schedule in order to meet your goal; think of this as your hours “bank”
   2. A **green** number (negative variance) means that you can add hours to the schedule and still achieve your productivity score goal; a **red** number (positive variance) means that you have too many hours scheduled and could reduce hours to achieve your goal
5. Variance by team member
   1. Number of hours scheduled and worked, by individual, for the given period; if there is a large variance in worked vs. scheduled, this area will show you the underlying cause

Graphical user interface

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**5**



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**4**



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**3**



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**2**



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**1**

# A doctor holding a dog Description automatically generated with medium confidenceCareVet News & Alerts

**Chapter**

**5**

*View the latest communications and information from CareVet HQ*

When there is a new communication from HQ, it will appear as **Bold** in the “News & Updates” pane in the bottom right corner of the home dashboard

If there is ever an important CareVet announcement or update, you can find it here

1. Click directly on a headline to view additional detail, where relevant; after you have clicked on a headline, it will still be visible but will no longer appear as bold

A picture containing text, screenshot, monitor

Description automatically generated



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**1**

Most headlines will take you to additional information housed in the CareVet News & Updates hub

Here you can find additional detail and relevant supporting resources within articles, as appropriate

1. You can also navigate between other articles directly from within the News & Updates hub, if you would like, without going back to the main dashboard
2. Article titles and content are searchable by clicking on the icon in the top right corner
3. Graphical user interface, text, application, email

   Description automatically generatedArticles will be tagged to common topics and can be filtered by clicking on the topic at the top of the page



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**2**



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**3**



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**1**