How to Answer a Request for a Data Snapshot

Open your CBISA Online™ program with a Facility Coordinator user ID. You will immediately be prompted that the Association Rollup™ organization is requesting a rollup authorization.

Click “OK” to continue working in CBISA Online™. When your data is ready to be sent to the Rollup Organization, follow the steps below:

1. From the “Options” dropdown list, choose Org Defaults.
2. Open the Facility Information page and “edit” your facility
3. Choose the Rollup tab and click on the Accept Rollup Request button

After exiting the Rollup request page and the Facility information screen, the snapshot will be available to your Rollup Administrator to include in any multifacility reports.
How to Include a Leadership Journal Entry in Your Snapshot

In order for your Association to receive narratives from the Leadership Journal, you must indicate which entries you would like included in the snapshot. To include a narrative in your snapshot, follow the steps below.

1. Open the Leadership Journal
2. Select the narrative you wish to include from the list contained in the browse box on the control panel.
3. Check the box at the bottom of the Narrative page.