**DATA ENTRY FOR INITIAL VISITS**

These are the steps to process an initial site visit data:

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| 1. Login to Presspoint using the link, username, and password provided. This will take you to your dashboard.
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| 1. Find the property that you are looking for in the dashboard, and click on the site address hyperlink.
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| In the Property Profile page: 1. Check that the **city**, **state**, **postal code**, **neighborhood,** and **county** fields are not blank or misspelled.

**NOTE:** In case any errors are found, please alert Rachael with the property hyperlink. Do not correct the data yourself. 1. Change **Site Status** to In Progress.
2. Select the **Property Type** field.
3. Change the **Next Task** to Follow Up Phone Call.
4. In the **Task Date** field, pick a date 6 months ahead.
5. Keep your name in the **Next Task Assigned** field.
6. Click the **Save** button.
7. Click the **Actions** button (top right corner) and select **Initial Assessment**.
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| 1. In the panel that opens on the right, enter the data of the paper site visit form into the appropriate fields, including:
* Assessment Date
* Technician
* Certification Level (In Progress or Certification Level)
* Watershed
* Onsite Natural Water Source (if applicable)
* Lake Oswego Demo Site (if applicable)
* Total Lot Size
* SQ FT plantable area
* SQ FT Naturescaped

**NOTE:** % Naturescaped is auto-calculated. * All remaining fields in the Assessment Base Data area.

 **NOTE2:** **NEVER** use “N/A” or “none” for blank fields. Simply leave them blank.**NOTE 3: NEVER** use the blank field or Manage hyperlink to add a new term to the choices.1. Click the Save button.
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| **NOTE:** You can easily edit an Initial Assessment Form by clicking the “Assessed” hyperlink in the widgetized history of the property profile, or by going to the History tab and clicking on the Initial Assessment hyperlink.**NOTE 2: NEVER** use the Actions > Initial Assessment button to edit an initial assessment. Doing so will create a new site assessment form instead.  |  |