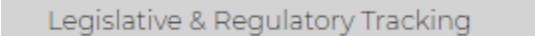




SAVING FILTERS AND ESTABLISHING EMAIL NOTIFICATIONS

Below are instructions on how to establish filters and email notifications from NAMIC's Legislative & Regulatory Tracking system. Please view the video demonstration of the system for a full guide to using the system.

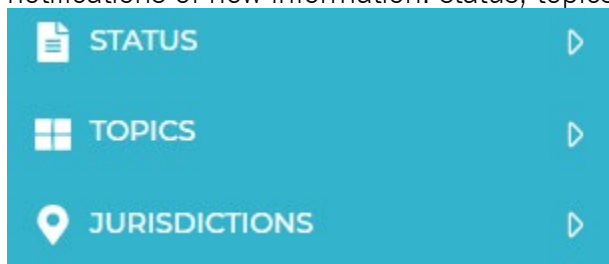
1. On the NAMIC home page, under **COMPLIANCE** click on


2. What appears is every item in the system. From here, you will need to use the



feature on the left side of the page to start creating a filter to narrow the results shown. As the icon represents, the filters function as a funnel, reducing the results shown in the system to just those filters you set.

3. There are three filters that are important to use to set up filters that will allow for email notifications of new information: status, topics, and jurisdictions.



4. Status: This filter is organized by type of document – bulletins/orders/directives issued by regulatory bodies, legislation, and formal regulations adopted by regulatory bodies.

Bulletins and Orders	▷
Legislation	▷
Regulation	▷

If you click on Bulletins and orders, you can select “issued,” which will filter the system results to only show issued regulatory documents. Legislation has 11 separate statuses, reflecting the different stages of the legislative process, such as introduced, enacted, failed, pending, vetoed, etc. Regulations are either proposed or adopted, also reflecting the typical stages of the regulation promulgation process.

5. The filters operate with checks and x’s. ✓ ✕ If you click on a checkmark, all documents in the system other than what you selected will be hidden and **only** the documents meeting that filtering criteria will be displayed. If you click on an x, all items in the system will appear in the results **except** the item you deselected. For instance, if you click the checkmark for “enacted” under legislation, the system will display **only** enacted legislation. If you click the x, it will display everything not checked **except** enacted legislation. The filters you have selected or deselected will appear at the top of the results:

Status Not: Bulletins and Orders | Issued ✕ Legislation | Enacted ✕ Regulation | Adopted ✕ Regulation | Proposed ✕

Using this “status not” filtering above, for instance, the system will show **all** results in the system except those deselected.

If you click on a check, the filter will say “status,” without the word “not.”

Status: Bulletins and Orders | Issued ✕ Legislation | Enacted ✕ Regulation | Adopted ✕

This means **only** information relevant to those filters selected will display in the system.

6. The system works similarly for topics and jurisdictions. Under each topic category, there are several subtopics. Selecting (or deselecting) a topic will now display under the “status”:

Status: Bulletins and Orders | Issued Legislation | Enacted Regulation | Adopted
Topic: COVID-19

Using the example above, the system is showing only enacted legislation, adopted regulations and issued bulletins/orders/directives/etc. applicable to the COVID-19 topic and all subtopics under that topic. To narrow further, click on the checkmark on one of the subtopics, which will now show in your selected filter display.

Status: Bulletins and Orders | Issued Legislation | Enacted Regulation | Adopted
Topic: PandC

Selected jurisdictions will show as such: Geographic Area: Hawaii Kansas


7. The same item may be included under several different topics and subtopics, but it will only display once in the system. If you click on COLUMNS you can then choose

✓ Topic

✓ Subtopic

to see which topics or subtopics are applicable to the filtered results.

The system default view is seven columns, but you can use the “columns” feature to show more information about each filtered item. Clicking on an individual item will show all the detail about that individual document including its history and the actual text of the document.

8. Once you have established a filter you want to save, click on  **SAVE FILTER**. A

Filter Preset Name:

Name

dialogue box will appear
call it whatever you want.

Type in the name of your filter – you can


Save Filter Preset

Filter Preset Name:

COVID-19 property/casualty information

Save

Then click .

9. Next, click on  **MY FILTERS**. This will show you all the filters you have saved.


My Filters

COVID-19 property/casualty information



At the right, you will see three icons for each filter:
filter. The trash can icon deletes the filter.

The down arrow re-runs that

10. If you want to set up automatic email updates for new information that qualifies for that filter, click on the envelope icon.  New information is automatically added to the system 5 days a week, Tuesday through Saturday. The system defaults to never (no emails), but allows you to receive emails daily, weekly, or monthly.

COVID-19 property/casualty information

Daily

Clicking on any of those, such as _____ and

Save

then clicking _____ will establish the email notification. The email will only display new information for your selected topic(s). You can save and establish email notifications for as many filters as you like, but you will only receive a **single** email that includes all results from all of your filters.

11. Emails will usually arrive by 8:30 AM eastern time. If you select weekly, the email will be sent on Tuesday. If you select monthly, the email will be sent the first Tuesday of each month. You **will** receive an email even if your filter does **not** pick up new information. This email will simply state that “no items qualified for this report.” If you use Outlook, the email will appear as follows:

NAMIC Tracking

Legislative & Regulatory Update

12. When you open the email, your selected filter results will display sorted by state with a summary of important information about the document. Regulations will appear as:

REGULATION: [3 CCR 709-1](#)

AUTHOR: Department of Regulatory Agencies/Division of Professions and Occupations/Dental Board

TITLE: Dentists & Dental Hygienists Rules And Regulations

PROPOSED: 12/28/2020

ADOPTED: 12/28/2020

STATUS:

12/28/2020 No published proposal

12/28/2020 Emergency Rule Adoption

SUMMARY:

Adds rule directing the immediate expansion of the workforce of trained medical personnel available to provide healthcare services within inpatient facilities due to the coronavirus disease 2019 (COVID-19) pandemic in Colorado.

12. If you want to view a particular document, it is linked using the citation.

REGULATION: [482-1-161-.07](#)

Clicking that link will take you to the tracking system and display the detail for that item.
MAKE SURE YOU ARE LOGGED IN TO NAMIC.ORG TO SEE YOUR RESULT.

If you have questions or need further assistance, please contact Angela Stackhouse at astackhouse@namic.org or Bri Dahl at bdahl@namic.org.