

Staff Account Set-up and Password Management

For users with staff security management privileges

Select "Staff" from the Search Menu

Search to verify that staff profile does not already exist

Click "Add New Staff Profile"

Staff Quick Search Advanced Search

Search: Staff

+ Add New Staff Profile Customize Columns More...

Staff - Quick Search Form

Enter one or more fields and click the 'Search' button to find staff with the same field information.

ID

Last Name

First Name

Works At (ID) [lookup](#)

Caseload (ID) [lookup](#)

Include Inactive staff Profiles **Search**

Fill in Fields

ID is FIRSTNAMELASTNAME (uppercase)

Add "Works At" location. This will give staff access to students in that location. Add "Alternate Works At" if needed

Add phone and email address

Editing Profile: Joan AASample (JOANAASAMPLE) Section: Main

Accept Changes Cancel Editing

Main

ID*	JOANAASAMPLE
First Name*	Joan
Middle Name	
Last Name*	AASample
Credentials	
Position	(none) ▼
Works At*	06147 (High Point School) (ID) lookup
Alternate Works At	L1 03507 (South Meadows El) (ID) lookup
	L2 <input type="text"/> (ID) lookup
	L3 <input type="text"/> (ID) lookup
	L4 <input type="text"/> (ID) lookup
	L5 <input type="text"/> (ID) lookup
	L6 <input type="text"/> (ID) lookup
Work Telephone Number	734-994-8100
Work Email	jaasample@washtenawisd
Operating/Employing District	<input type="text"/> (ID) lookup

Staff Account Set-up and Password Management

Credentials, Position, Role for Service Capture

Add Credentials, Position, and Role for Service Capture, if applicable

Credentials: Text field, use for Teacher Consultants*

Position: Populates documents, and is the Program on Worksheet Bs

UPDATED – *Role field for Service Capture Only:* For Medicaid billing, for Teacher Consultants that are case managers, use Targeted Case Manager/SE Classroom Teacher. This will allow them to access the Monthly Progress Summary. If the TC is not a case manager, use Teacher Consultant.

*Type “Teacher Consultant” in the Credentials field for Teacher Consultants who have the TC Approval from the State of Michigan. This will allow searching and reporting on TCs even if their position or role is not Teacher Consultant.

Main	
ID	JOANAASAMPLE
First Name	Joan
Middle Name	
Last Name	AASample
Credentials	Teacher Consultant
Position	Resource Room Program
Works At	High Point School
Alternate Works At	L1 South Meadows Elementary School
	L2
	L3
	L4
	L5
	L6
Work Telephone Number	734-994-8100
Work Email	jaasample@washtenawisd.org
Operating/Employing District	
Service Capture Staff Information	
Role field for Service Capture Only	Targeted Case Manager/SE Classroom Teacher
Requires Supervision?	<input type="checkbox"/>
Teacher Assigned to Paraprofessional	

Staff Account Set-up and Password Management Security

Select Security tab

The screenshot shows a staff profile page for 'Joan Sample (JOANAASAMPLE)'. At the top, there is a search bar with the name. Below it are several tabs: Profile, Documents, Events, and Security. The Security tab is highlighted with a red circle. Below the tabs is a navigation bar with options: Main, Edit, Add New, View Staff Calendar, Print, and More... Below this is a 'Main' section with a table containing the following information:

ID	JOANAASAMPLE
First Name	Joan
Middle Name	
Last Name	Sample

Click Edit Security

The screenshot shows the 'Edit Security' page for 'Joan AASample (JOANAASAMPLE)'. The Security tab is selected. Below the tabs are 'Edit Security' and 'Print' buttons. The main content area displays:

Joan AASample's Security Profile (Login Not Activated)
Works At Location: Chelsea High School

Select appropriate security group.

Change Login to Activated (temporary password) a Temporary Password will appear

Accept

Notify staff person that their account has been activated with the default password

The screenshot shows the 'Staff Security Profile' page for 'Joan AASample (JOANAASAMPLE)'. The 'Login status' is set to 'Activated (temporary password)' and the 'Temporary Password' is 'Wa*S1M&ZIN'. Below this is a note about privileges and 'Accept' and 'Cancel' buttons. The main section is titled 'Mark the checkboxes next to the security groups Joan AASample should be a member of:' and contains a list of security groups with checkboxes:

- [WISD] AAPS Import GenEd
- [WISD] Advanced Edit
- [WISD] CIY Oversight
- [WISD] Contact Log Users
- [WISD] District Supervisor/Secretary
- [WISD] District User
- [WISD] District User View Only
- [WISD] EO Admin
- [WISD] EO User
- [WISD] Inactive User

There is also a checkbox for 'Constrain by Location' which is currently unchecked.

To re-set a password - Search Staff, Select Security Tab, Edit Security, Change back to Temporary Password