## Staff Account Set-up and Password Management
For users with staff security management privileges

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| Select "Staff" from the Search Menu<br><br>Search to verify that staff profile does not already exist<br><br>Click "Add New Staff Profile" |  |
| Fill in Fields<br><br>ID is FIRSTNAMELASTNAME (uppercase)<br><br>Add "Works At" location. This will give staff access to students in that location. Add "Alternate Works At" if needed<br><br>Add phone and email address |  |

## 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

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|---|---|
| **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<br>L2<br>L3<br>L4<br>L5<br>L6 |
| **Work Telephone Number** | 734-994-8100 |
| **Work Email** | jaasample@washtenawisd.org |
| **Operating/Employing District** | |

#### Service Capture Staff Information

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| **Role field for Service Capture Only** | Targeted Case Manager/SE Classroom Teacher |
| **Requires Supervision?** | ☐ |
| **Teacher Assigned to Paraprofessional** | |

| Staff Account Set-up and Password Management | |
|---|---|
| Security | |
| Select Security tab |  |
| Click Edit Security |  |
| Select appropriate security group.<br><br>Change Login to Activated (temporary password) a Temporary Password will apprear<br><br>Accept<br><br>Notify staff person that their account has been activated with the default password |  |
| To re-set a password - Search Staff, Select Security Tab, Edit Security, Change back to Temporary Password | |