Admin Session 1:

STAFF – ADD NEW, REASSIGN STUDENTS, DEACTIVATE OLD ACCOUNTS

BACK TO SCHOOL RESPONSIBILITIES

Portage Bay Solutions

responsive database consulting

Working with Staff Records

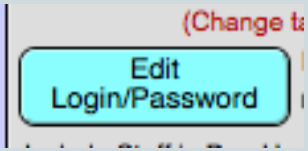
- Managing staff lists is pretty easy in E-Com. We'll walk through:
  - Creating a new staff member,
  - Assigning & changing passwords,
  - Changing staff IDs, names, and user names,
  - Reassigning students, and
  - Deactivating staff accounts
- Then we'll discuss other back-to-school things, like setting 'count' dates and calendars.

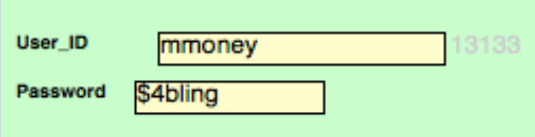
Add a Staff Record

- Go to the Staff screen by clicking the pink Staff button.
- Run a search to see if the staff record already exists.
- If it does, you can reactivate the record by checking the “Include Staff in Pop-Up Lists” box. Then skip down to the Schools/Programs step below and continue.
- If not, click once on the green “Create New Staff” button for a new staff screen.
- Enter the staff member’s first and last names.
- Be sure the checkbox next to “Include Staff in Pop-Up Lists” is checked – otherwise they will not be able to log in.
- If you use E-Com for both SpEd and 504, go to the Schools/Programs tab and verify the program assignment.
- If your district uses the School restrictions, you may also add schools. If ‘school restriction’ is on in your E-Com, staff members will only be able to see the student records for students enrolled in the assigned schools.

New Staff Record, cont.

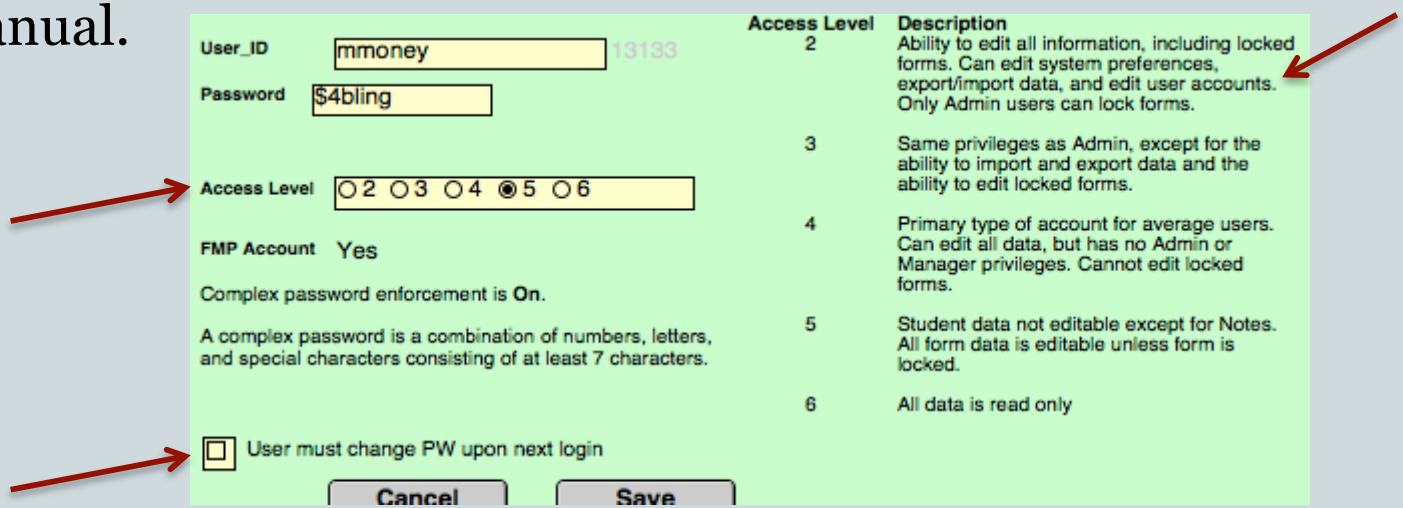
- The next step is to edit the login user name and password, and assign an access level.
- Select the blue “Edit Login/Password” button.
- When the dialog box comes up, enter a user name (we recommend first initial, last name format – aclare, for instance.)
  - Do not use hyphens, apostrophes, or spaces in the user name. All these have caused issues with logins.





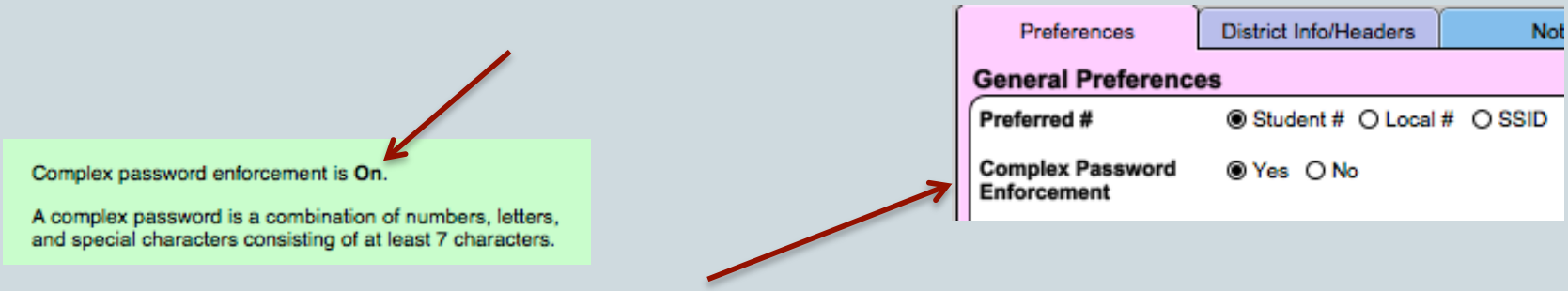
New Staff Record, cont.

- Enter a password.
  - You may wish to assign a generic password that they must change after their first login – to do so, enter the password, and then check the box near the Cancel & Save buttons that says "User must change PW upon next login."
- Check the access level. Levels 4-5 are usual for general staff, levels 2-3 for admin staff. Level 6 is read-only. A brief synopsis of levels is to the right of the dialog box; more details may be found in the Admin manual.



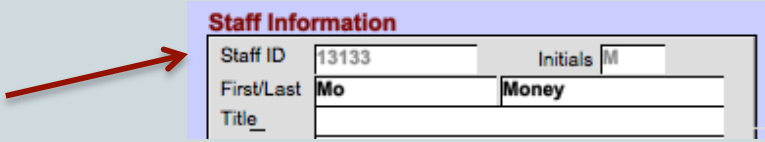
New Staff Record, cont.

- If “complex password enforcement” is on, that means that passwords must have a mix of numbers, letters, and special characters (!, @, #, $, %, &), and must be at least 7 characters long. This setting may be turned on or off in Admin-> Prefs, under General Preferences.
  - Note: Hosted districts do not have access to this setting.



New Staff Record, cont.

- Once you have saved the user name and password information, you will be back on the staff screen.
- If you use the SIS import system to update student records in E-Com, and want case manager information to be imported from Skyward, the staff ID in E-Com must match the staff ID in Skyward.
- To do so, find the staff ID for this user in Skyward. Then enter that information into the “Staff ID” box in the upper right corner of the staff screen.



Changing Staff IDs

- Be careful changing staff IDs; the relationship between student and assigned staff is based upon the staff ID, and if you change it, you can blank the staff name on the assigned student screens.
- If you need to change the staff ID, make a note of the old one before doing so.
- Once you have changed it, you may need to do a find for student records with the old staff ID, so you can reassign them.
  - This is also the process for reassigning students to a new case manager.

Changing Staff Names

- Staff members may modify their own accounts; admin level users may modify any staff account.
- To change a staff name, go to the appropriate staff screen and make the changes there. The changed name will appear in the staff lists once you have left the name field.
- It will not automatically change the login “user” name, which must be changed manually.
- To change the user name, go to the appropriate staff screen, and select the “Edit Login/Password” button. Once the dialog box comes up, change the user name.

Reset Passwords/Change User Name

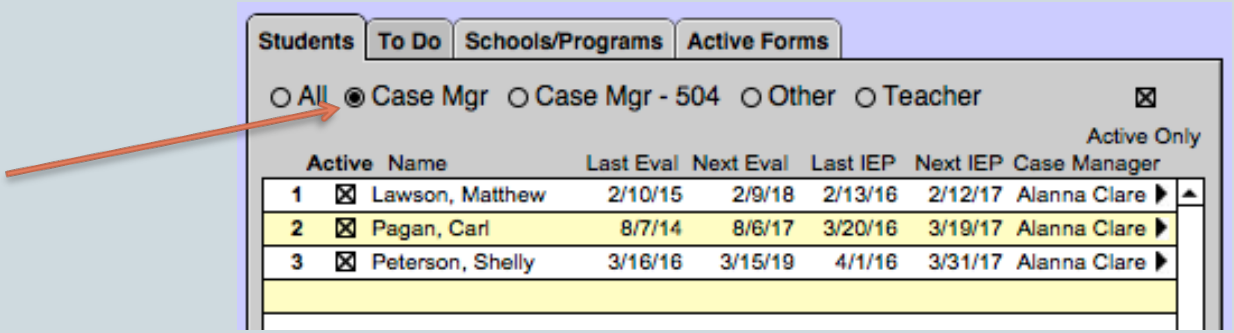
- Admin users may reset user passwords or user names, if needed.
- To do so, find the staff record where the password needs to be reset.
- Click the “Edit Login/Password” button.
- Make the change. Be sure to let the staff member know the new user name or password!
- If you reset the password, we recommend using a generic password (new1234# or the like), and requiring that they change that password on the next login.

Reassigning Students

- If you are reassigning case managers, and you use a student import, you simply need to verify that the case manager name is correct in Skyward or Schoolmaster. The next import should update the record.
- If you don't use an import, or if you need to reassign another role than case manager, you need to determine which students will be reassigned, and to whom first.
  - It is easiest when all students currently assigned to a particular staff member will be reassigned to one other staff member, but you may also have cases where some students will be reassigned to one staff and others to another. This will require two or more reassignment operations.
- Go to the staff screen of the staff whose students are being reassigned. You should be able to use the 'My Students' list here to gather the various lists of students.

Reassigning Students, cont.

- On the staff screen, select the appropriate role button.
  - If you are reassigning students in several roles, you may need to do several different operations.
  - Do NOT use the "All" list if the staff serves as both case manager and some other role; the replacement works on the field selected, regardless of the name that is currently there. You must separate the student lists where the staff is case manager from the lists where the staff serves some other role.



Reassigning Students, cont.

- Determine if you want to reassign only active students, or inactive ones as well.
- Click the My Students button; which will take you to a list of the students. Verify that you want to reassign all these students.
  - You may omit one or more using the blue Omit button.

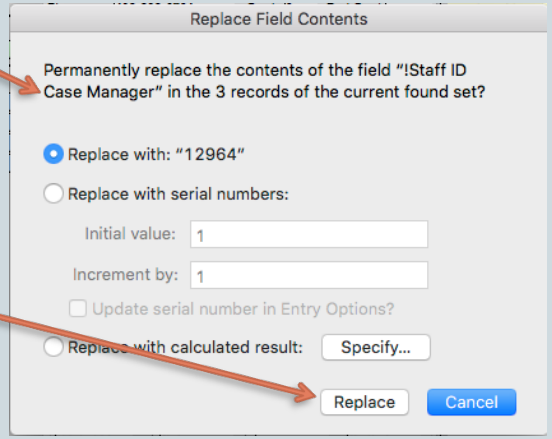
Omit	Active	Student #	Student Name	Birthdate	Age	Case Manager	Disabling Condition	Grade	Serving School	Next IEP Date	Next Eval Date	Next Mtg. D
	☒	10	Pagan, Carl	8/3/2005	11 y 0 m	Alanna Clare	DEAF	3	Alder Elementary	3/19/17	8/6/17	
	☒	6	Lawson, Matthew	12/14/2000	15 y 8 m	Alanna Clare	SLD		Alder Elementary	2/12/17	2/9/18	
	☒	1	Peterson, Shelly	4/25/2005	11 y 3 m	Alanna Clare			Alder Elementary	3/31/17	3/15/19	

Reassigning Students, cont.

- Once you have the list of students to be reassigned, select the name of the first student on the list.
  - This will take you to the student screen. It should be 1 of however many students there are in the list, not 1 of 1.
- Now you can do a global replace:
  - On the first student screen, enter the correct Staff ID in the correct field, and make sure the name appears correctly.
  - Put your cursor back into the same yellow box, so that it is selected (you need to click twice in the box).
  - Once the staff ID field is selected, go up to the “Records” menu item at the top of the page, and select “Replace Field Contents.”

Reassigning Students

- A dialog box will come up.
- Confirm that the field to be changed is correct - it is listed in the top paragraph of the dialog (Case Manager, Teacher, SLP, etc.).
- Click the “Replace” button.
  - Note: The default button in the Replace Field Contents dialog box is Cancel. Read the choices carefully before you click a button or hit the Enter key.
- Repeat as needed until all students who need to be reassigned have been, and no active students appear in any roles on the old staff member’s screen.



Deactivating Staff Records

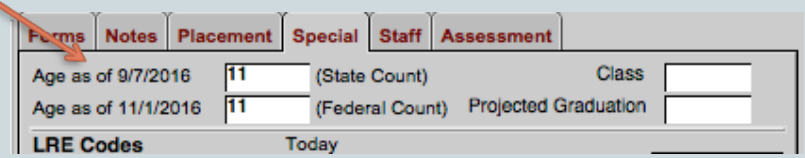
- From the staff screen, find the staff record to be deactivated.
- Verify that no active students are assigned to the staff member.
- Uncheck the box next to “Include Staff in Pop-up Lists.”
  - This will remove the staff name from any staff pop-up lists on forms, student records, etc. The staff member will no longer be able to log into E-Com.
- If you wish to clean up old staff records, you may also delete inactive staff using the “Delete” button on the staff screen.
  - We recommend waiting 2-3 years after deactivation before deleting staff records.

Other Back to School Items

- State & Federal Count Dates
- Updating calendars
- Download E-Com software & the Getting Started Guide for new staff
- Incrementing grades if not using SIS

Count Dates

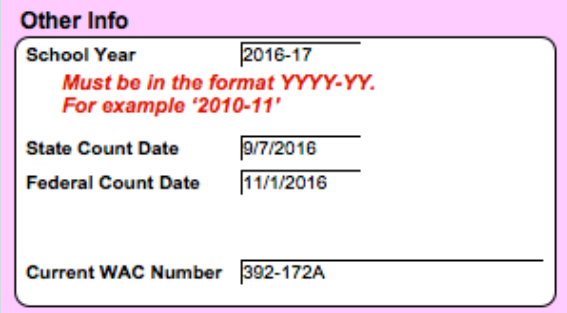
- Most districts need to change the count dates each year. This change will be evident on the student screen's Special tab, and it changes the age shown on various reports.



- The dates are on Admin > Pref, in the first tab.
  - These options are not available at this time to hosted districts; we will update your dates for you.

Count Dates, cont.

- The only items that need updating are those in the 'Other Info' box at the bottom right.
- Change the school year and the state and federal count dates.
  - Note that the school year should be in the format YYYY-YY in order to appear correctly on reports in E-Com.



School Calendars

- Calendars should be updated in order for several automatic calculations in E-Com, such as the 35-day period after an initial consent, to be correct.
- To update the calendar, you can go to the Admin screen and select Calendar from the drop-down under 'Admin Tools'
- Once on the calendar, click on the dates where school is not in session (weekends are already blocked out) for your district. The date should highlight in yellow. Dates in yellow or peach (weekends) will not be counted.
  - If you make a mistake, just click again, the date should clear.

Downloading E-Com Software

- Each district should have its own page on our “Tools” website, where staff can download the software needed to access E-Com. Installation instructions, the login file, a “Getting Started” guide, and a short document on using E-Com on a iPad should also be available.
  - Not all download pages have been updated to include all these items; please let me know if your download page needs any of these.
- I will send each of you your district download link when I send the PDF of this webinar.

Incrementing Grades

- If your district uses SchoolMaster or Skyward to pull student information in E-Com, your students' grades will automatically update the day after they have been updated in the SIS system.
- If you do not use on of these systems to update your student records, you may increment the grades yourself, using a button for that purpose on the Preferences screen.
- Caution is urged with the use of this button; clean your data first, and only click the button once!

Incrementing Grades, cont.

- The button only works on active student records.
- If you have any 0-3 or preschool students in E-Com, you should temporarily deactivate them before you increment.
  - E-Com is not set up to properly calculate or to overlook those students, and if they are active when the button is clicked, they may end up in 1st grade – or elsewhere.
- Be sure to click the button only once. Each click will increment active students by one grade.