

User Profile

Overview

Within the User Profile, permissions to various screens and features are set up. Each data entry person must have a User Profile, prior to being able to enter or even view IMS data. The User Profile can only be accessed by persons with a Security Level of System Manager or CPC.

The programmers at the CPC will maintain the User Profiles, upon request. The CPC is the only Security Level that can change System Manager profiles.

Only System Managers and the CPC security levels can access the User Profile.

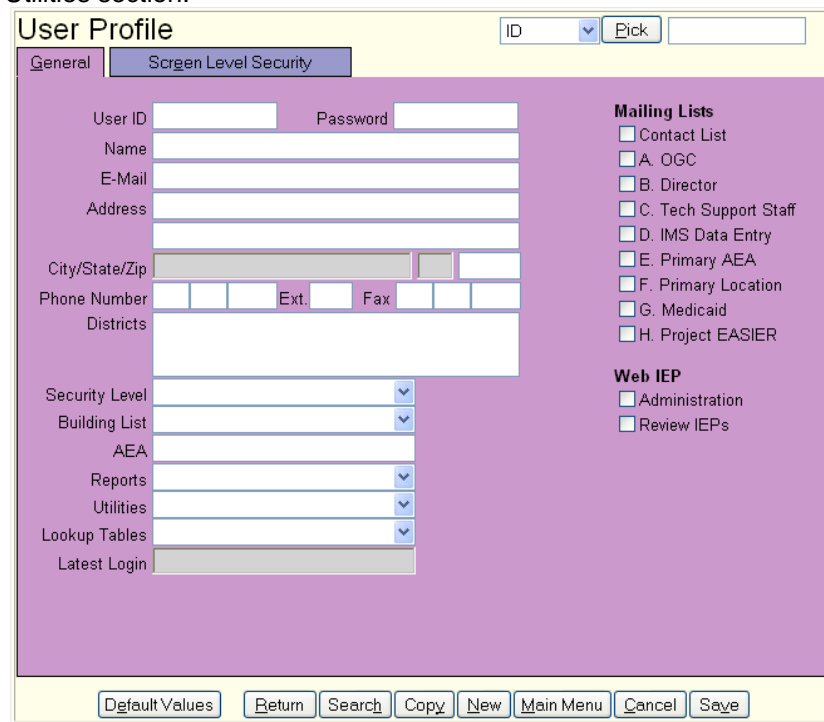
The email address in the User Profile must match the email address in the Staff Demographic.

Uniform Data Entry Procedure

At this time, there are no Uniform Data Entry Procedures related to User Profile.

Access to Screen

From the Main Menu, select User Profile or the Screen Level Security tab under the Utilities section.



The screenshot shows the 'User Profile' form with two tabs: 'General' and 'Screen Level Security'. The 'Screen Level Security' tab is active. The form contains the following fields and sections:

- General Fields:**
 - User ID: [Text Box]
 - Password: [Text Box]
 - Name: [Text Box]
 - E-Mail: [Text Box]
 - Address: [Text Box]
 - City/State/Zip: [Text Box]
 - Phone Number: [Text Box]
 - Ext.: [Text Box]
 - Fax: [Text Box]
 - Districts: [Text Box]
 - Security Level: [Dropdown Menu]
 - Building List: [Dropdown Menu]
 - AEA: [Text Box]
 - Reports: [Dropdown Menu]
 - Utilities: [Dropdown Menu]
 - Lookup Tables: [Dropdown Menu]
 - Latest Login: [Text Box]
- Mailing Lists:**
 - Contact List
 - A. OGC
 - B. Director
 - C. Tech Support Staff
 - D. IMS Data Entry
 - E. Primary AEA
 - F. Primary Location
 - G. Medicaid
 - H. Project EASIER
- Web IEP:**
 - Administration
 - Review IEPs

At the bottom of the form, there are buttons for: Default Values, Return, Search, Copy, New, Main Menu, Cancel, and Save.

User Profile

ID

General

Screen Level Security

Child

Demographic:

Adult/Child:

Services:

Disabilities:

Referrals:

Evaluations:

Meetings:

Plans:

Severity:

IEP Results:

Assistive Tech:

ESYS:

Agency

AEA Profile:

Region Profile:

District Profile:

Building Profile:

Agency Profile:

Hearing

Screening:

Loss:

Equipment:

Staff

Demographic:

Licenses:

Endorsements:

Departments:

Services

Profile:

Eligibility:

Locations:

Assigned Staff:

Medicaid

View Download:

Build Headers:

Foxpro:

Enter Claims:

Transmit:

Modules

Inventory:

CEC Follow-up:

Course Info:

Course Enroll:

Work Study:

Student Minutes:

Review Data:

Date Information:

Projection:

Pooling:

Add a User Profile

It is recommended that a data entry person contact the CPC for technical assistance, if unfamiliar with making changes in User Profile.

1. Click on New.

Note: All the following fields are required, unless otherwise noted.

2. Enter User ID.

Note: This is usually the same as the network login.)

3. Enter password.
4. Enter first and last name of person in Name field.
5. Enter e-mail address. Make sure this e-mail address matches exactly the e-mail address in the Web IEP Set User Permissions.
6. Enter phone number. (optional)
7. Enter the district(s) for which this person should receive e-mail notifications of changes to child records. The format for multiple district is xxxx yyyy zzzz Note that there is a space between each 4 digit district number.
8. Set the security level. For persons who work with the Child Count, this is typically Data Entry Level – Level 3. For other persons who will be given an account, select Data Entry – Level 2.
9. For the Building List, choose data that will be displayed in the output reports.
 - a. Assignments (no kids), gets report data from Assignments or Services button in Staff Demographic.
 - b. Departments Screen, gets data from Department screen, so any matching buildings, districts or regions.
 - c. Districts (above), from Districts entered in the Districts box.
 - d. Entire AEA, whole AEA
 - e. Assignments (yes kids), gets report data from Assignments.
 - f. Service Coordinator gets report data from Assignments where user is the Coordinator.

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10. Select AEA.
 11. Set the reports related to FoxPro settings. This setting is not used in web IMS.
 12. Set the Utilities. Warning: Utilities can be used to make global changes to data. Only experienced data entry persons should have access to this menu.
 13. Set the Lookup Table. This is a FoxPro setting that is no longer used.
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Set Screen Level Security

In order for a data entry person to have access to the various screens, screen-level security must be established.

1. Click on the tab “Screen Level Security”.
 2. Based on the following four levels of security, select the appropriate security level for each screen:
 - a. No View: The screen will not be able for viewing.
 - b. View Only: The screen is viewable but not editable.
 - c. Edit: The screen is viewable and editable.
 - d. Add/Delete: The screen is viewable and editable and the data entry person is able to add or delete a record.
 3. Click on the Save button.
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