

# (Staff) Demographic

## Overview

This file contains information which identifies an individual service provider. In addition, one service provider may have a one to many relationships to buildings, classes, licenses, endorsements, plans, interventions, etc.

This screen is also used to give permission for a staff person to be able to access web IMS reports.

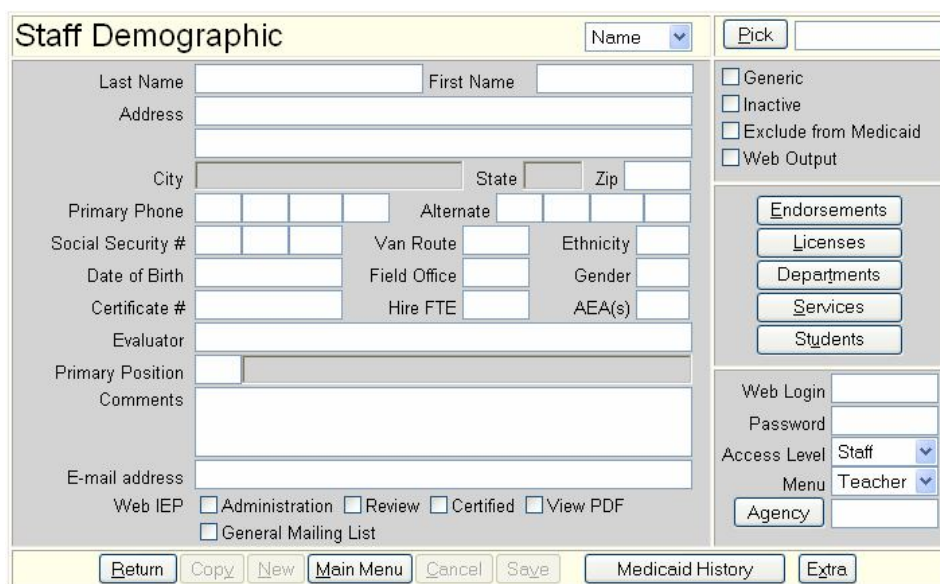
If the staff member is also in the User Profile, the email address in the Staff Demographic must match the email address in the User Profile.

## Uniform Data Entry Procedure

At this time, there are no Uniform Data Entry Procedures related to (Staff) Demographic.

## Access to Screen

From the Main Menu, select Demographic under the Staff section.



## Access Level Field

An access level should be chosen so that the staff person will see the appropriate data. The description of each access level follows:

- **Staff:** An individualized screen will display. Data will display as it relates to caseload(s) for that staff person. Note: The staff person must also have Staff Assignments.
- **Building:** A building specific screen will display. This screen will have a list of reports that can be run by a staff person in that building. The person will only be able to view data for the building number(s) to which he/she has been assigned. The building will be assigned through the Department screen.

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- District: A district specific screen will display. This screen will have a list of reports that can be run by a staff person in that district. The person will only be able to view data for the district(s) to which he/she has been assigned. The district will be assigned through the Department screen.
  - Region/Sector/Zone: A region/sector/zone specific screen will display. This screen will have a list of reports that can be run by a staff person in that region/sector/zone. The person will only be able to view data for the region/sector/zone(s) to which he/she has been assigned. The region/sector/zone will be assigned through the Department screen.
  - Area Education Agency: This access level is for data entry persons. This access level allows for general reports and custom reports to be run.
  - State: This access level allows for general reports and custom reports to be run for state data only.
  - Central Processing Center: This access levels allows for general reports and custom reports to be run in addition to being able to maintain the IMS application.
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### **Add or Modify Staff Who Will Not Be Given Web Access**

1. Select the Demographic link under the Staff section on the Main Menu.
2. Type in the partial or complete staff name in the field area next to the Pick button. If a new service provider needs to be added, click on the New button and type in the data.
3. Enter Last Name (required).
4. Enter First Name (required).
5. Enter Primary Position (required). If there is no matching code for the primary staff position, enter 307 "Other Professional Staff" and enter the exact job description in the Comments field.
6. Enter any other data, per your AEA wishes.
7. Click the Generic checkbox, if this record will be used to identify a position that is generic.

Note: If a service provider's name changes frequently for a particular position, the AEA may not want to keep track of each staff name. In those cases, select Generic. The position should be specified in the Last Name field. For example, an AEA needs to assign a child/youth to a transportation service. By using the Generic field and entering "Bus Driver" in the last name field, "Bus Driver" may be selected when making assignments. Other types of Generic positions include classroom associate, school counselor, vacancy, out of area.

8. Click the Inactive checkbox, if this service provider is no longer employed by the Agency or if the service provider has left the Agency.

Note: By using this checkbox, the name of the service provider may be displayed in certain outputs for historical purposes. When this checkbox is selected, a line is added before the service provider's last name and the name is moved to the bottom of the incremental search window. In addition, the web login and password on this screen will be cleared out.

9. Click the Exclude from Medicaid checkbox, if this service provider is to no longer receive Medicaid forms.

Note: If a service provider would not normally receive Medicaid forms (e.g. not a Medicaid eligible service provider), this checkbox will have no effect.

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Note: The checkbox Web Output was added to the screen in anticipation of future use. It is not being used and at this time, there is no intention of using it.

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## Add or Modify Staff Who Will Be Given Web Access

1. Click on the Demographic link under the Staff section to pull up the Staff Demographic screen.
2. In the Pick field, type the name of the service provider who will be given access to the web reports.
3. If the service provider's name is not found, click on the New button to add that person.
4. Enter the person's e-mail address (required).
5. Enter the AEA (required).
6. Enter a unique web login. If this staff member is already in the User Profile, the web login cannot be the same as the User ID from the User Profile.
7. Enter a password.
8. Select the User's access level.
9. Select the User's menu. Typically this is the same as the access level.
  - Teacher: Typically for teachers to view blank forms, create class rosters, and run reports on IEP data. Must have staff assignments.
  - Support Staff: Typically for support staff to view blank forms, create class rosters, and run reports on IEP data. Specifically for hearing to run the Hearing report. Must have staff assignments.
  - Building/District/Region: For anyone that needs access to reports for specific building, district or region/sector/zone.
  - AEA Director: For staff people who need reports for the whole AEA.
  - State: Not used. No reports available at this time.
  - CPC: Only to be used for CPC staff.
  - Test: Only to be used if set up by CPC. For testing reports.
  - Medicaid: Only to be used if set up by the CPC. Allows access to the Medicaid Eligibility Report (can be set up for only the building, district or region that the Staff Member has for Medicaid).
10. If this staff person is a teacher, this completes this part of the setup. Please proceed to the next section "Verify the Setup".

If this staff person is a building, district or region/sector/zone person and has one assignment, continue with Step 11. Otherwise, go to Step 14.

If this staff person is a building, district or region/sector/zone person and has multiple assignments, go to Step 14.

11. Click on the "Agency" button.
    - If access level is Building, clicking on the "Agency" button will bring up a popup window with a listing of all building. The search can be narrowed by typing in a partial district and building number in the box next to the agency button. Double click to pick one building.
    - If access level is District, the "Agency" button will bring up a listing of all the districts. Double click to pick one district.
    - If access level is Region/Sector/Zone, the "Agency" button will bring up a popup window of all the regions in the Staff members' AEA. Double click to pick on region/sector/zone.
    - If access level is AEA, the "Agency" button will pop in your AEA number.Note: There can be only building, district, or region in the Agency field. It will take precedence over anything entered into the Departments screen. If there is more than one building or district, then use the Departments screen and leave the agency field blank.
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12. This completes the setup for this staff person. The record will save automatically when you leave the screen.
13. Click on the "Departments" button to bring up the Department Assignment screen.
14. If the staff person is a region/sector/zone person, enter the region/sector/zone number in the region/sector/zone field.

If the staff person is a district person, enter the district number in the Agency (District) field.

If the staff person is a building person, enter the district number in the Agency (District) field and enter the Building number in the Employer/Contractor (Building) field.

15. Click the "Copy" button to set up additional locations. The record will save automatically.

**Note:**

- The unique web login might be the user name from the person's e-mail account.

If a generic password is used when the account is created, remind the service provider to change the password.

## Verify the Setup

1. From the IMS Main Menu, click on "User List"
2. Verify that the staff person show up correctly.

### Staff Login Information

Staff	Login	Password	Access Level	Menu	AEA	Agency
Doe, John	jdoe	1234abc	Building	Building		0004118
Doe, Jacob	jadoe	education	Building	Building		99990409
Doe, Jennifer	jdoe	county4	District	Teacher		
Doe, Sam	sdoe	7paper	Staff	Teacher		
Doe, Tess	tdoe	apple4chr	Staff	Teacher		