AcademicEHR

powered by Procentive

INSTRUCTOR TRAINING

CREATING STAFF

MODIFIED | 11/30/15

FILENAME | 04_INSTRUCTOR-TRAINING_CREATING-STAFF

How to Create a Student

1. **Click on the Staff Module** .
2. **Click “Add”** in the upper right corner.

Under the Staff Tab, make the following changes.

- **First Name:** Enter the first name of the student
- **Last Name:** Enter the last name of the student
- **Gender:** Enter the student’s gender
- **Email:** Enter the student’s email address
- **User Name:** In all lower case letters, enter the first letter of the student’s first name and then the student’s last name, be sure to not use any capital letters, no characters/punctuation and no numbers.
- **Password:** For the initial setup, make the password “abcd1234”
- **Require Password Change on next logon:** Make sure it is set to “Yes”

Under the Phones Tab, make the following changes.

- **Phone Number:** Enter the student’s phone number, if applicable
- **Description:** Enter the description of the phone number, such as Cell or Home.

Under the Role Tab, make the following changes.

- **Role:** Select Student
- **Type:** Choose Therapy/Counseling
- **Clinical Supervisor:** Enter the staff that is overseeing their clinical work.

Under the Locations Tab, make the following changes.

- Check the box under the Associated column for all applicable licensures.

Under the Program Tab, make the following changes.

- Check the box under the Associated column for all applicable classes they have registered for.

3. **“Click Save”** .

Note: The modules the Student should see based on Role should be:

- Clients
- Clinical
- Documents
- Ticketing
- Settings

Adding Instructors

1. Click "Add" 

in the upper right hand corner and the Add Staff window will appear in a new window.

Under the Staff Tab, make the following changes.

- **First Name:** Enter the first name of the professor
- **Last Name:** Enter the last name of the professor
- **Gender:** Enter the professor's gender
- **Email:** Enter the professor's email address
- **User Name:** In all lower case letters, enter the first letter of the professor's first name and then the professor's last name, be sure to not use any capital letters, no characters/punctuation and no numbers.
- **Password:** For the initial setup, make the password "abcd1234"
- **Require Password Change on next logon:** Make sure it is set to "Yes"

Under the Phones Tab, make the following changes.

- **Phone Number:** Enter the professor's phone number, if applicable.
- **Description:** Enter the description of the phone number, such as Cell or Home.

Under the Role Tab, make the following changes.

- **Role:** Select Instructor
- **Type:** Choose Therapy/Counseling

Under the Locations Tab, make the following changes.

- Check the box under the Associated column for all applicable licensures they oversee.

Under the Program Tab, make the following changes.

- Check the box under the Associated column for all applicable classes they have.

2. Click "Save" 

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Note: The modules the Instructor should see based on Role should be.

- Diagnoses
- Reports
- Training
- Training Assignments

Updating Student & Instructor Information

1. **Double-click on that Student or Professor's line**, anywhere that is not a blue link, and the Change Staff window will appear.
2. **Edit any information** you would like changed.
3. **Click Save** in the lower right hand corner of the screen.