[VIDEO] Create Staff Types

Last Modified on 08/05/2020 11:13 am CDT

You can create staff types with customized permissions. This allows you to set default permission levels for specific staff groups. For example, you can set up administrators, managers, claims processors, monitors, volunteers, and so on. Then, when you create a new staff account, you can simply select the staff type and assign that type's permissions to the user.

1. Click the Tools menu and select Sponsor Staff Types. The Manage Staff Types dialog box opens.

6	Manage Staff Types 📃 🗉 💌			
	Name			
	Office Staff			
	Data Entry			
	Instructions			
Click [Add] to add a new row. Click any existing row and type to edit it. Remember to [Save] changes when done. To throw out changes, just [Close] without saving.				
(Delete Add Save Close			

- 2. Click Add. A blank line displays.
- 3. Click the blank line and enter the name of the staff type. For example, if you are creating a monitor type, you could type Monitor.
- 4. Click Save.
- 5. Continue to add as many staff types, as needed.

When finished, set permission levels for the new staff type(s).

1. Click the Tools menu and select Sponsor Staff Permissions. The Manage Sponsor Staff Access dialog box

opens.

2. Click the Staff Type drop-down menu and select the staff type. A list of permissions displays.

🐝 Mana	ge Sponsor St	aff Access	• 🗙
Use star	this function to ff types.	o setup default permission sets for differ	ent
	Staff Type	Monitor 👻	
	Category	Permission	
	Attendance	Estimate Attendance	
	Attendance	Record Center Attendance	. =
	Centers	Delete Center	
	Centers	Enroll Center	1
	Centers	Modify Center	1
	Centers	Withdraw Center	1
	Children	Activate Children	
	Children	Assign Classrooms	
	Children	Delete Children	
	Children	Enroll Children	
	Children	Manage Formula Types	
	Children	Modify Child Histories	
	Children	Modify Child Info	
	Children	Modify FRP Level	
	Children	Modify IEF Application	
	Children	Modify Title XX	-
Set Al		els	
All	Non	e Save Close	

- Check the box next to each permission to give this staff type. You can also click All to select all permissions, and then clear the boxes next to each permission to remove. Click None to clear all of your selections.
- 4. When finished, click Save.