

Staff members, depending on their areas of responsibility, may be part of multiple organization units.

The Process

1. A staff members must have an active log-on. This is the primary role, associated with one Organization Unit (OU).
2. An authorized individual in the additional or new OU sets up the staff member profile, including the User Role.
 - o The User Name and Email must match the primary profile *exactly*.
3. The staff members logs-on to the primary role, accesses their profile and approves the additional OU access.

Step #	Action	How
Authorized Individual in the Additional or New OU		
1	Set up the additional profile in the desired OU	Click on Menu, Information, My Staff 2. Click Create Staff to access Staff Profile – General Information screen
2		Click Create Staff to access the Staff Profile – General Information Screen
3		Complete required fields: first name, last name, business title, verify the new OU is accurate, input phone type and number
4		Complete any known optional information
5		Click Save
6		Upload file, if applicable
7	Add User Information	Click Staff Role
8		Click Add in the User Information title bar
9		Input User Name and email <i>Note: These must exactly match the user name and email on the original profile</i>
10		Click Save
11		Click Confirm in the pop-up message Both profiles are visible under Login Management The original profile is active and the 2 nd pending
12	Add User Role	In Staff Role, click Add User Role Set in User Roles tab
13		Click on the User Role(s) being added
14		Click Save to see the new OU
Staff Member		
15	Approve the New OU	Log-on using primary OU
16		Click Menu, My Information, My Profile
17		Click User Account
18		Click Approve next to the pending OU line item
19		Click Confirm in the Confirmation Request pop-up
20	<i>Access the Additional OU</i>	Depending on what is available on the log on screen: Click the radio button of the appropriate OU or identify in the “One Behalf Of” drop down.

Repeat the above process for each OU a staff member is to have access to