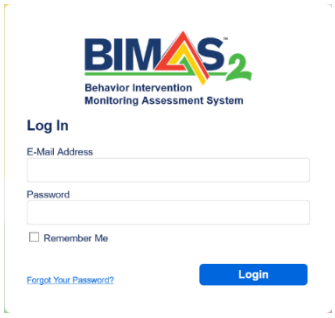
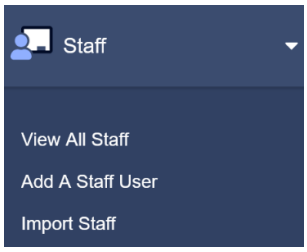
STEP 2.
CREATING THE STAFF LIST

The second step in the process of setting up the BIMAS-2 account is to create the list of its users, the **Staff members** (district and school building administrators, teachers, counselors, school psychologists, social workers, other clinicians, etc.). Everyone who is to have access through a login process into the BIMAS-2 platform for one or more students must be part of the Staff database. There are two ways of creating the Staff list, (a) manually, one member at a time and (b) through an import file process. These two approaches are described next.

(A). MANUAL ENTRY OF STAFF.



Login into the BIMAS-2 with your account
https://app.edumetrisis.com/

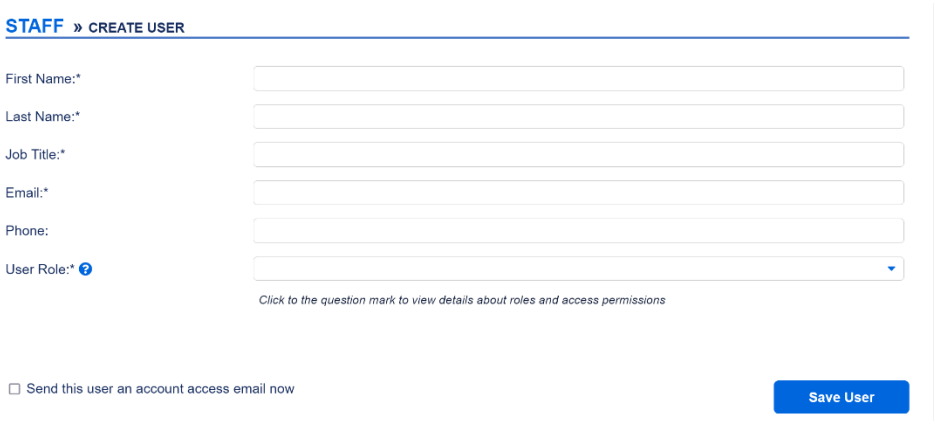


From the BIMAS-2 menu, select Staff

(press the white triangle to expand and view the options available)

Select **Add A Staff User**

The Staff data entry window will appear (see below). Enter the information for each of the fields**. Job Title** is a required field but it is text free, it accepts any values. **User Role** determines the access they will have in the database.



In regard to the **User Role**, there are 5 options (see below).



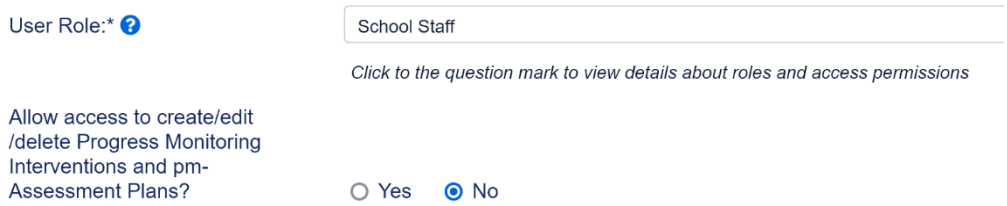
Prior to making a decision on the roles please press the blue circle with the question mark. This will reveal the table below (see next page) that describes what a user can accomplish with a certain role.

Note/Caution: *If you are the account holder and the only person identified as the District Administrator, DO NOT downgrade your role until you add someone else from your district in this role. In fact, we highly recommend that you have at least two individuals with the DISTRICT ADMIN role.*

Please review the table on the next page for more details on tasks that can be accomplished by each role.

We also recommend to:

- Assign the **School Administration** role/access to anyone that should have access to **all** students in a certain building (i. e. principal, assistant principal, nurse, mental health staff, etc.).
- Reserve the role **School Staff** for anyone in the organization that you wish to have access to certain students only and decide if you want to give them access to create progress monitoring plans (see figure below). For example, this will be a proper access role to give someone from an outside agency that delivers services to students in a building, but you do not want this person to have access to all students.



- Assign all your teaching staff the role of **rater only**. Please do not confuse School Staff (described above) with the classroom teachers. Teachers who will be doing the screening are identified as Universal Assessment raters (UA Teachers). When

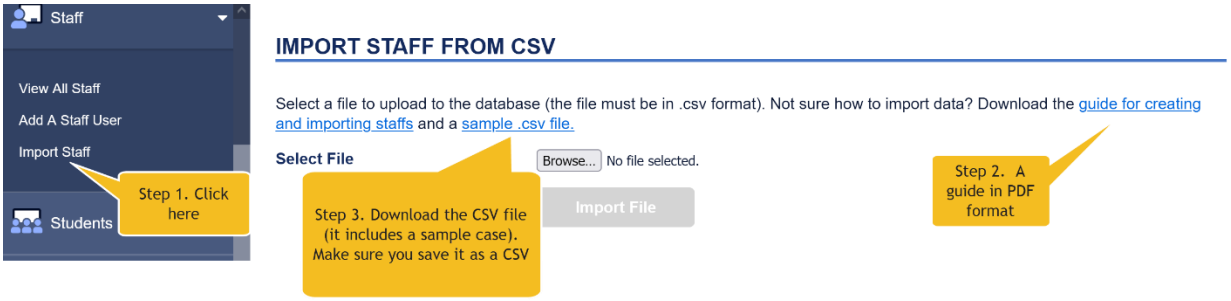
logging into their account they will be able to view the results of the ratings they performed on the students assigned to them as well as any data they provide as part of certain student(s)' Progress Monitoring plans (Tier II and II services). Additional teachers can be added as "raters only" to provide feedback through a link they will receive in their email. These individuals do not have access to data, reports, etc. but their names and an email address must be included in the database in order to be used in a progress monitoring plan. When one desires to collect information/ratings from non-school personnel (i.e., a therapist in private practice), this individual must be added in the database so that their emails are available for use by the platform.

USER ROLE ACCESS RIGHTS

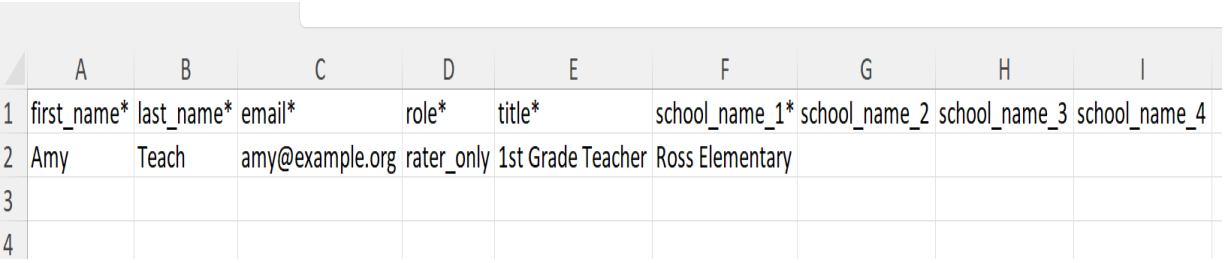
Access Rights	District Admin	District Staff	School Admin	School Staff	Rater Only
Creating/Editing Schools	Yes	Yes	No	No	No
Creating/Editing Staff	Yes	Yes - but not District Level Users	Yes for their schools	No	No
Creating/Editing Students	Yes	Yes	Yes for their schools	No	No
Assigning Raters to Students	Yes	Yes	Yes	Yes	No
Import CSV Files	Yes	No	Yes for their schools	No	No
Scheduling UA's	Yes	No	No	No	No
Create & Edit Progress Monitoring Plans	Yes	Yes	Yes for their schools	Only if Checkbox on their account is clicked	No, only can be a Rater
Reports	All	All	Yes for their schools	Yes for their schools	Reports on Individual Students Pages Only
Enter responses from paper forms	Yes	Yes	Yes	Yes	No
Send UA Notifications	Yes	Yes	Yes for their schools	No	No
Generate Parent Letters	Yes	Yes	Yes for their schools	Yes for themselves	Yes for themselves
Suggested User Types for this Role	Account Owners, Power Users	District Level Psychologist, District Level Counselors, Distric Level Admins	Principal, School Level Psychologists & Counselors	Related School Personnel (i.e. School Counselors, Psychologists, Outside Agencies)	Teachers, Clinicians, Raters for Progress Monitoring

(B). ENTER STAFF DATA WITH THE IMPORT TEMPLATE.

A BIMAS-2 school administrator (or sometimes a district's IT person) can use the importing feature to add a large number of staff members in the database. To import staff, visit the **Staff menu** (see below).

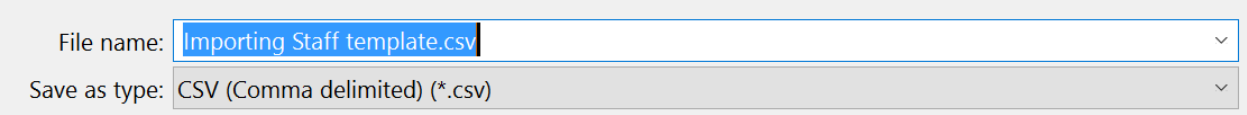


When you open the “Importing Staff Template” it will look like the figure below.



	A	B	C	D	E	F	G	H	I
1	first_name*	last_name*	email*	role*	title*	school_name_1*	school_name_2	school_name_3	school_name_4
2	Amy	Teach	amy@example.org	rater_only	1st Grade Teacher	Ross Elementary			
3									
4									

Use your school’s or organization’s database and export the information (6 columns of required data showing above) from that database into a file that you will save as a CSV file. Format this CSV file so that it follows exactly the columns and organization of the sample file you downloaded from the BIMAS-2. Again, save the new file and make sure its format is CVS (see below).

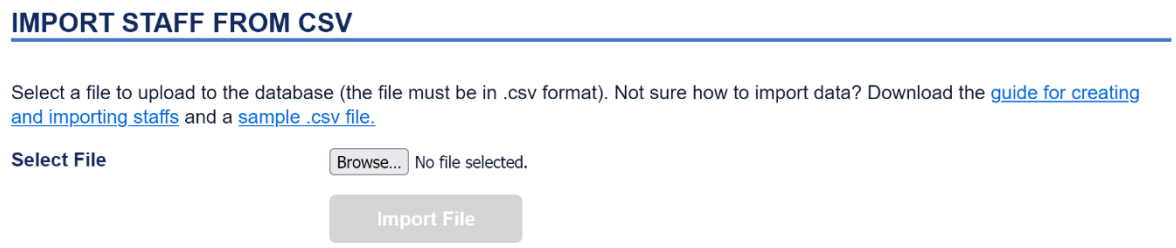


Below is an explanation of the various fields/columns needed in the CSV import file you to import staff information (* indicate a required field).

Field/variable name	Field/Variable type
first_name*	String
last_name*	String
Email*	A valid email address for the person. Check really carefully the accuracy of the email address. **CAUTION:** Only one email address can be used throughout the BIMAS-2 database, across all BIMAS-2 accounts.
Role*	Values can be one of the following (case sensitive) district_admin district_staff school_admin school_staff rater_only Please see discussion earlier on the various roles. Review the “access role table”. Once data are imported roles can be specified and edited later on by the BIMAS-2 account manager. If you are unsure about a person’s access it is advisable to assign them [rater_only] access and then edit accordingly at a later time. **CAUTION:** A user identified as District Administrator should NEVER downgrade their access level, especially if they are the only ones in

	the account with this access. It is advisable that at least two people are designated with the District Administrator role but ONE of the two creates the UA assessment (screening) period.
Title*	String (examples could be: School Counselor, School Psychologist, Social Work, Teacher, Principal, etc...) or any title used in your setting. Give Staff users a meaningful title, one that will allow you to sort out the staff list using this field. For example, if you have a number of 3rd grade teachers, give the title 3Rd Grade Teacher, not just Teacher.
school_name_1*	(string). You may add as many schools connected to a user as you would like at the initial set-up (school_name_1; school_name_2…and so on…) but it is required that you start with at least one. You can add additional settings for a Staff member later when you set up/edit the various Staff members access levels. **CAUTION:** The name of the school in this file must be **exactly** as the name you used when you set up the schools. Even a small space that might not be visible can create a problem. If you get an error message during the staff import process stating that a school does not exist, but you can see that the building is listed in the BIMAS-2 school list, chances are the two names are not identical. Sometimes an extra blank space at the end of the school's name in either of the two files might be the reason. If this happens, we recommend that you log in the BIMAS-2 account, go to Schools, select a school /building, press edit, and then copy only the text as it appears in the BIMAS and then paste it into the excel file.

From the BIMAS-2 menu, select **Staff** and then select **Import Staff**.



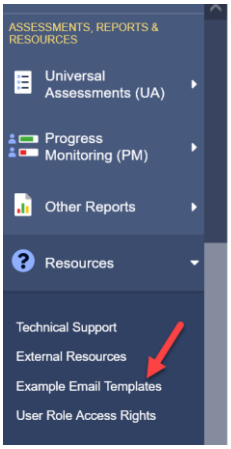
The IMPORT STAFF FROM CSV data entry window will appear (see below).

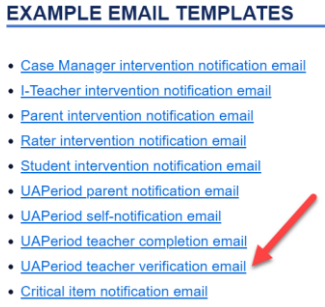
Select [**Browse**], then select the staff CSV file you just created. The platform will check and validate the file. Next, press [**Import File**]. Wait a few seconds. Depending on the size of your

file you will get feedback on the screen regarding the success of the import. If there is an error in the import file you created, you will receive a message of what needs to be corrected. Press "Close" and then select the "Staff" menu item from the main menu. The list of your Staff/Users will appear in alphabetical order.

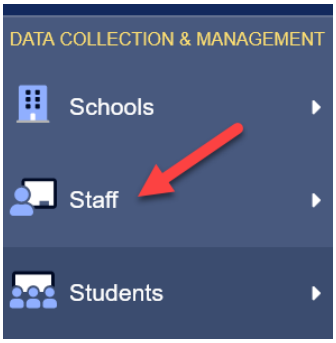
(C) INVITING STAFF TO ACTIVATE THEIR ACCOUNT

Next, decide whether to send all Staff members an activation email to create their own BIMAS-2 account and passwords. It is a good idea to use an internal email to notify users that an email is coming from BIMAS-2. If you wish you can copy the content of the actual email they will receive. This is listed under the Resources menu item



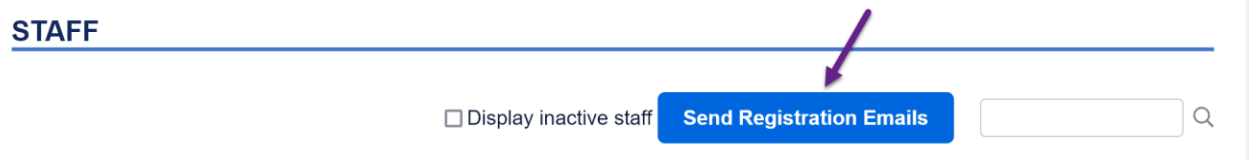


NOTE: You may want to hold on to this step until you import the student data file as some teachers might activate their account and then they might be looking for their classroom/student list and begin sending you emails that something is wrong.

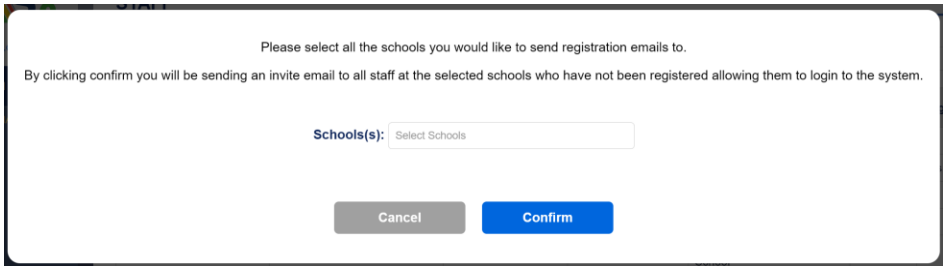


From the menu, select **Staff**

Then press [Send Registration Emails]



An interactive window will appear (see below).



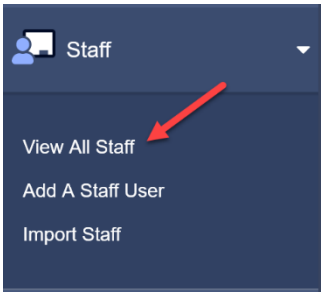
As you have noticed you can select to notify the staff at certain schools.

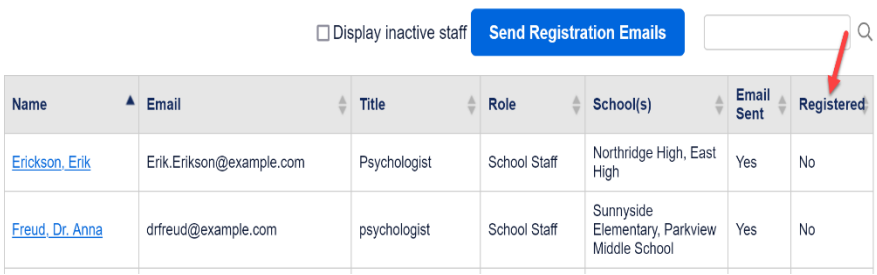
> **Note:** Since Universal Assessment (screening) windows apply to all buildings, this feature will allow you some additional control of when screening can begin at a certain school building by controlling the activation of accounts.

When you [Send An Activation Email] to staff (an individual or group), they will receive an email with a temporary password, along with an invitation to create their own password. This temporary password included in the email has a time stamp, so encourage your staff to login and establish their own passwords right away.

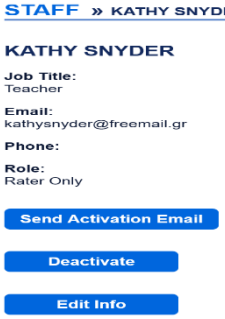
In the event that the temporary password does not work, direct them to visit the same URL (link) they received in their email, use their email address, press Forgot Password and follow the prompts in their school email. This will allow them to reset their password as well.

> **Note:** As you are reviewing the Staff list (see figures below), you might notice that some staff have not activated their account. You can send another "group" invitation as described above. Only those with no activated accounts will receive the email notification.





Inviting Staff individually

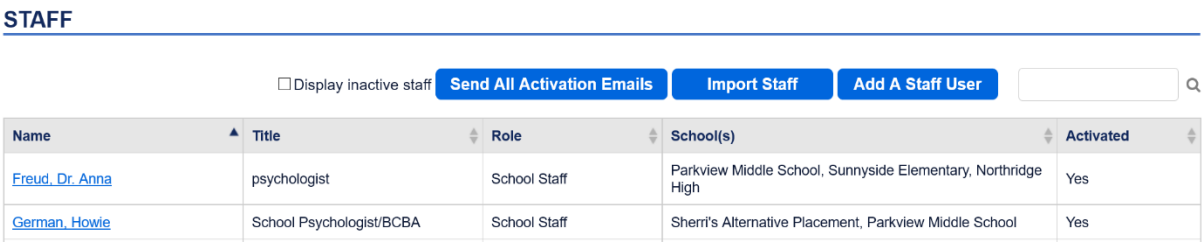


There might be instances where you might need to send an activation e-mail one staff member at a time. In this approach, you select the name of the staff member and then press "Send Activation Email" (see pic to the left)

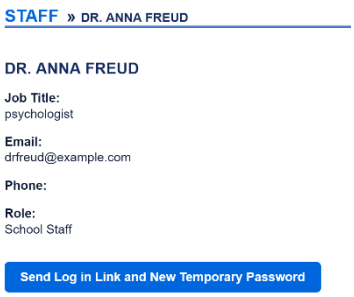
Note: As you are reviewing the Staff list you might notice that some staff have not activated their account. You can send another "group" invitation as described above. Only those with no activated accounts will receive the email notification.

D. ASSIGNING & EDITING STAFF ACCESS LEVELS

A staff member's access level can be edited at any time. Let's select Dr. Anna Freud (see pic below). According to the BIMAS-2 account she has access to three schools.



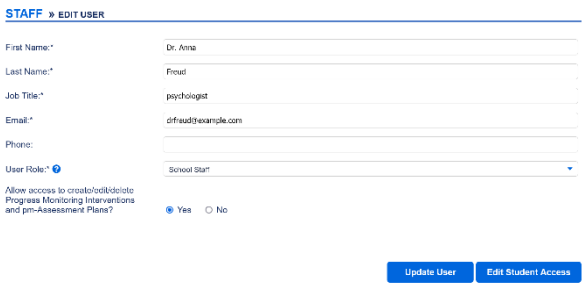
Select her name by clicking on it.



The window that opens offers the option to edit information about Dr. Freud.

Select by clicking on 

.



Pressing [**Edit Student Access**] reveals the schools that the person has access to (see below) as well as the ability to select to have access to certain individual students (see figures below).



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Thank you for reading this brief guide. We hope that it captures all steps needed to create the Staff list in the BIMAS-2 account. For further help, please email us at help@edumetrisis.com

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