



extended**Reach**
powered by **k**care

STAFF MANAGEMENT

System Administrator Training



Participants will be muted by default



Questions? Submit using Zoom's Q&A function.



Session will be recorded and available in the User Guide



A link to request a training certificate is provided at the end of the evaluation

Agenda



Adding a New User



Uploading Signatures



Staff Documents and Training



User Management



Support Resources



Overview

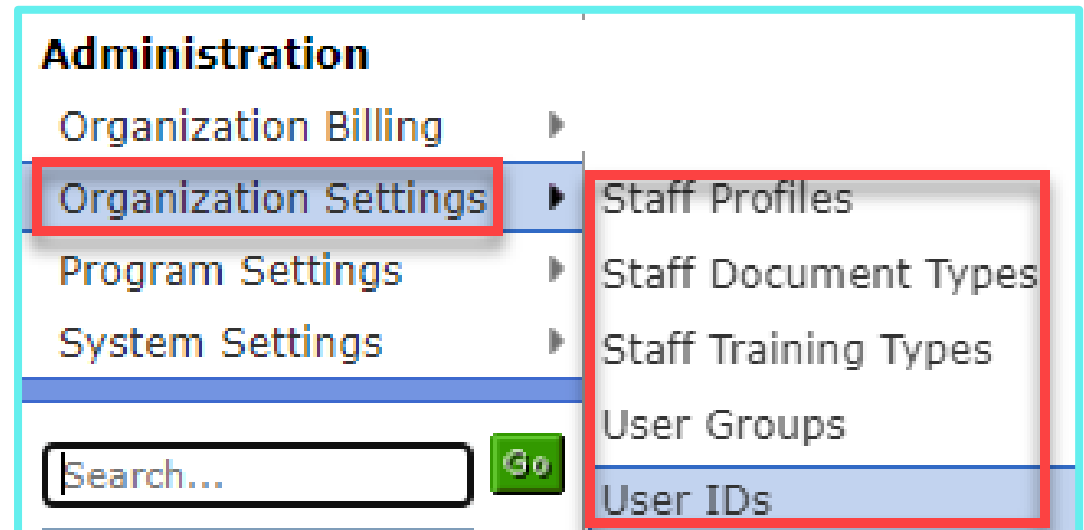
- User ID
 - Gives ability to login
 - Delete when user terminated
- Staff Profile
 - Staff Basic Information
 - Supervisor
 - Upload digital signature image
- Inbox (package specific)
 - Scan/email documents into system to file in case, home or staff file
- User Group
 - Group individuals to set permissions
 - Updates all individuals in group when permissions changed
- Staff Documents
 - Track compliance of staff documents
- Staff Training
 - Track staff training hours and set next due dates

User ID

- Accessing the extendedReach software system requires a User ID.
- This is the first step in adding a new hire to the system.
- An employee requires only a User ID if they need to access the system only.
- If an employee works with cases within the eR system, they also require a staff profile.
 - A Staff Profile displays employee name in staff fields – performed by (author of a document), submit for approval to, etc.

Add User ID

- Completed by Administrators
- Navigate to Administration > Organization Settings > User IDs
- Click Add User ID on top menu bar



Add User ID

- User Information:
 - Name
 - Organization
 - Branch, if applicable
 - Job Title
- Login Information
 - E-mail Address (username)
 - Temporary Password – Force password change on next login
 - Send Welcome email
 - Create and link Staff Profile
 - Create and link Inbox

The screenshot displays a web form for adding a new user. It features two tabs: 'General' (selected) and 'Comments'. The form is divided into two main sections: 'User Information' and 'Login Information'.

User Information Section:

- Last Name:** Jones
- First Name:** Jessica
- Middle Initial:** (empty field)
- Organization:** Enchanted Family Services (Storeybrook) (dropdown menu)
- Branch :** Wish Realm (dropdown menu)
- Job Title:** Case Manager

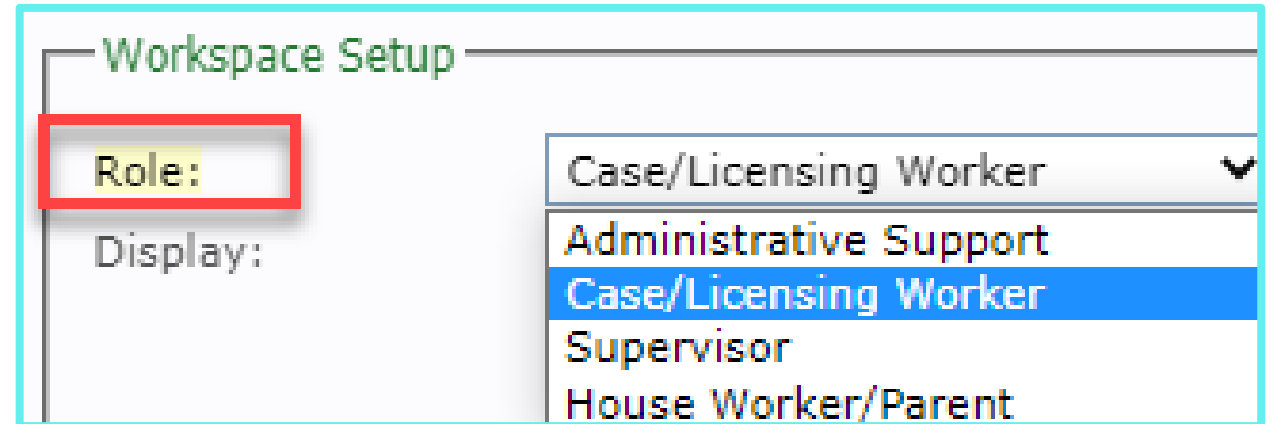
Login Information Section:

- E-Mail Address:** jesjones@yahoo.com
- Password:** (masked with dots)
- Confirm Password:** (masked with dots)
- ☒ Force password change on next login
- ☐ Send Welcome Email
- ☒ Create and link Staff Profile
- ☒ Create and link Inbox

The 'Create and link Staff Profile' and 'Create and link Inbox' options are highlighted with a red rectangular box.

Workspace Setup

- Role Options (not configurable):
 - Administrative Support
 - Case/Licensing Worker
 - Supervisor
 - House Worker/Parent
- Display
 - Preferences to display on the user's workspace
 - Change based on Role selected



Workspace Setup

Role: Case/Licensing Worker

Display:

- Administrative Support
- Case/Licensing Worker
- Supervisor
- House Worker/Parent

Administrative Support Workspace

- Only workers, reports and stats in my branch
- “Active Referrals” portlet
- “Awaiting Approval” portlet – Important for supervisors or staff that approve documents submitted by staff.
- Show only medical info in case file – option for medical subcontractors

Workspace Setup

Role: Administrative Support ▼

Display:

- ☐ Only workers, reports, and statistics in my branch
- ☐ "Active Referrals" portlet
- ☐ "Awaiting Approval" portlet
- ☐ Show only medical information in case file

Workspace Views

- Portlets
 - Workers – click on worker's name to view their workspace screen
 - Active Referrals – access referrals to deny or move to placement
 - Inbox (Package Specific) – documents scanned or emailed using Inbox email to be filed
 - Awaiting Approvals – quick access to documents that require approval

Enchanted Family Services

you are here: **My Workspace**

Enchanted Family Serv...

My Stuff

- My Workspace
- My Tasks

Cases

- Case Rosters
- Case Tasks

Homes

- Home Rosters
- Home Tasks
- HomeMatch™

Summaries

- Dashboard
- Casework
- Demographics
- Intake
- Discharge
- Staff
- Resources

Administration

- Organization Billing
- Organization Settings
- Program Settings
- System Settings

Search... **Go**

Case Last Name ▾

Workers - Refresh -

Name	Cases	Homes	Late
Carlyle, Robert	0	3	1
Dallas, Josh	4	0	32
Morrison, Jennifer	3	2	26
O'Donoghue, Colin	3	0	27
Parilla, Lana	2	0	26
Supervisor, Ginnifer	0	2	0

Active Referrals

Date	Prog.	Status	Name
07/22 04:26 PM	FC	Accepted	Fowler, Amy Farrah
07/19 04:25 PM	FC	Pending	Hofstadter, Leonard
07/15 04:24 PM	FC	Pending	Stark, Tony

Inbox How does this work?

Date	Attachments
Inbox: Josh Dallas	
07/28/2021 10:41 AM	Consent for Psychotropic Meds.pdf File this
07/28/2021 10:41 AM	Grade Card.pdf File this
07/28/2021 10:41 AM	IEP.pdf File this

Awaiting Approval (All) - Approve Selected -

<input type="checkbox"/>	Submitted	Type	Worker	Client
<input type="checkbox"/>	07/26 12:18 PM	MON	O'Donoghue, C	Pan, Peter
<input type="checkbox"/>	07/29 09:26 AM	TRE	Dallas, J	Cooper, Sheldon
<input type="checkbox"/>	07/29 04:12 PM	INC	Supervisor, G	Bellamy, Tink
<input type="checkbox"/>	08/03 12:00 PM	MAI	Morrison, J	Crawley, Rober...

Program Info

- Across All Programs - ▾

Open Foster Cases: 12
Total Clients: 12
Ant. Discharges within 30 Days: 1
Incidents last 3 Days: 0

Home Info

Licensed Homes: 6
Licensed Homes on Hold: 1
Special Investigations: 1
Applicants/Unlicensed Homes: 1
Ant. Approvals within 30 Days: 1

Open Homes: 7
Applicant: 1
Foster Home: 6

% Occupancy (# active licensed beds used)
Foster Home: 69% (11 of 16)

Case/Licensing Worker Workspace

- All cases (vs. just cases assigned to me)
- All cases in my branch (vs. just cases assigned to me)
- All licensed homes (vs. just homes assigned to me)
- All licensed homes in my branch (vs. just homes assigned to me)
- "Active Referrals" portlet

Workspace Setup

Role: Case/Licensing Worker

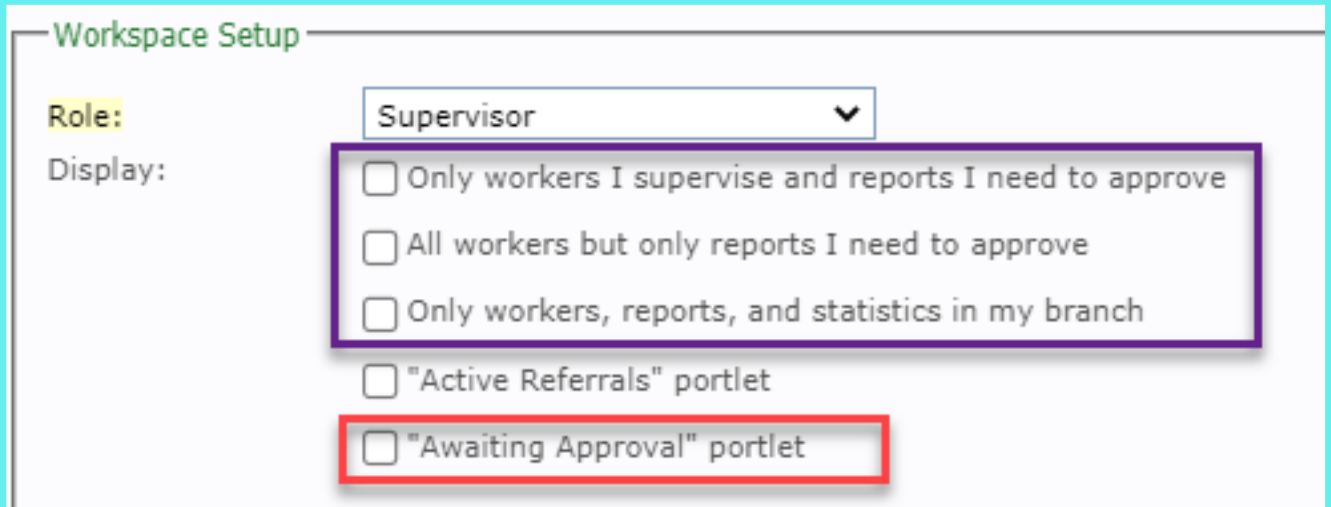
Display:

- ☐ All cases (vs. just cases assigned to me)
- ☐ All cases in my branch (vs. just cases assigned to me)
- ☐ All licensed homes (vs. just homes assigned to me)
- ☐ All licensed homes in my branch (vs. just homes assigned to me)
- ☐ "Active Referrals" portlet

Only access assigned cases or homes if none of these checked

Supervisor Workspace

- Only workers I supervise and reports I need to approve
- All workers but only reports I need to approve
- Only workers, reports, and statistics in my branch
- "Active Referrals" portlet
- "Awaiting Approval" portlet



The screenshot shows a 'Workspace Setup' form. It has a 'Role:' dropdown menu set to 'Supervisor'. Below it, under the 'Display:' label, are five checkboxes. The first three checkboxes are grouped by a purple box, and the last two are grouped by a red box. The first three checkboxes are: 'Only workers I supervise and reports I need to approve', 'All workers but only reports I need to approve', and 'Only workers, reports, and statistics in my branch'. The last two checkboxes are: '"Active Referrals" portlet' and '"Awaiting Approval" portlet'.

Workspace Setup

Role: Supervisor

Display:

- ☐ Only workers I supervise and reports I need to approve
- ☐ All workers but only reports I need to approve
- ☐ Only workers, reports, and statistics in my branch
- ☐ "Active Referrals" portlet
- ☐ "Awaiting Approval" portlet

House Worker/ Parent Workspace

- For Direct Care Staff or House Parents
- Homes field – select homes the house worker/parent will access
- Limits them to placed clients in the selected homes

Workspace Setup

Role: House Worker/Parent ▼

Homes: Green Meadows Cottage

My Stuff

- My Workspace
- My Tasks
- Summaries**
- Resources ▶

Go

▼

Help ▼

Cases by Home

Name	Placements
Green Meadows Cottage	Broflovski, Ike Cooper, Sheldon Stark, Tony Warner, Blair

My Recent Activities

Date	Case/Home	Type	Status
07/27	Broflovski, Ike	Dly Prgrss Nt(ON)	Completed

Other Options

- Weekly Status Email – send weekly emails to varying groups including cases and homes (emailed weekly Sunday 5pm EST)
- File Manager – eR Plugin (default) is extendedReach's proprietary software that allows users to edit word documents right in the eR database.
- Download Folder – location extendedReach temporarily holds your file while you edit it in eR Plugin.

Other Options

Weekly Status Email: - None -

File Manager: eR Plugin

Download Folder: System Temporary

Options: ☐ Hide help icon (lower right corner)

Other Options

Weekly Status Email: - None -

File Manager:

Download Folder:

- None -

- None -

My Cases and Homes

Supervised Cases and Homes

All Cases and Homes

Security Rights

- Group – select user group, if applicable
- Administrator – level of security includes no, Full Admin, Restricted Admin
- Apply Profile – the system will auto-populate roles typically performed; adjust the selections by checking or un-checking items.
- Miscellaneous Permissions – adjust “Miscellaneous Permissions” for the user

The screenshot shows the 'Security Rights' form with the 'Apply Profile' dropdown menu open. The menu lists several options: '- Select a Profile to Apply -', 'Worker - Case', 'Worker - Licensing', 'Worker - Both', 'Supervisor - Case', 'Supervisor - Licensing', 'Supervisor - Both', 'Support Staff', 'Read-Only', and 'Full Access'. The 'Worker - Both' option is highlighted in blue.

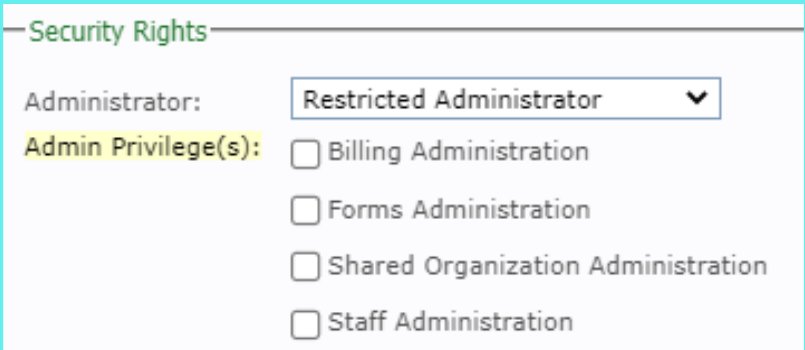
Group:	- No Group Assigned -
Administrator:	No
Apply Profile:	- Select a Profile to Apply -

The screenshot shows the 'Security Rights' form with the 'Applied profile' set to 'Worker - Both'. Below this is a table with columns for 'Type', 'Add', 'Delete', 'Edit', 'Approve', and 'Complete'. The table lists various permissions and their status (checked or unchecked).

Type	Add	Delete	Edit	Approve	Complete
Cases:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-
Case Activities:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Case Reports:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Homes:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-
Home Activities:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Home Reports:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Security Rights – Administrator

- No Administrator
 - No access to any administrative functions
 - Most common for caseworkers, licensing workers, therapists, shift staff, interns, etc.
- Full Administrator
 - Full access to all administration functions (billing, forms, staff, and shared access)
 - Ability to add/change/delete users and modify security permissions for a user
 - Ability to change items in the Organization Preferences screen
- Restricted Administrator
 - Billing
 - Forms
 - Staff
 - Shared – access to multiple organizations

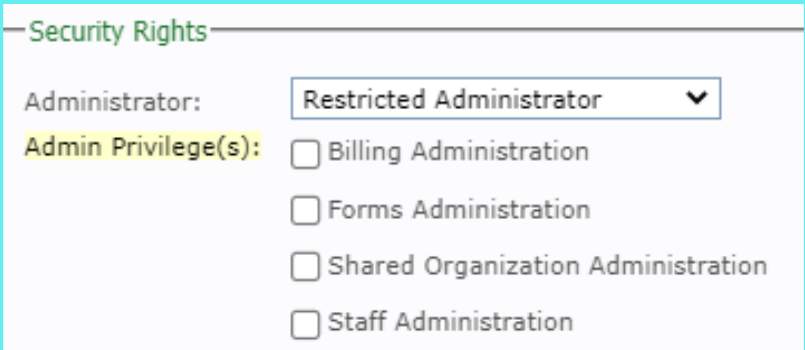


The screenshot shows a 'Security Rights' configuration window. It features a dropdown menu for 'Administrator' currently set to 'Restricted Administrator'. Below this, under the heading 'Admin Privilege(s):', there are four unchecked checkboxes: 'Billing Administration', 'Forms Administration', 'Shared Organization Administration', and 'Staff Administration'.

Security Rights	
Administrator:	Restricted Administrator ▼
Admin Privilege(s):	<input type="checkbox"/> Billing Administration
	<input type="checkbox"/> Forms Administration
	<input type="checkbox"/> Shared Organization Administration
	<input type="checkbox"/> Staff Administration

Restricted Administrator

- Billing Administration
 - Accounting staff that generate days care billing and accounts payable batches
 - Add/change/delete days care billing rate sheets
 - Create and post client charges, payments, and adjustments (if “Aging” module enabled)
- Forms Administration
 - Support Staff that need access to Configurator
 - Manage Email Alerts
 - Manage Scheduled Training
 - Manage Foster Family Website content



The screenshot shows a window titled "Security Rights". It contains a label "Administrator:" followed by a dropdown menu showing "Restricted Administrator". Below this is a label "Admin Privilege(s):" followed by four checkboxes, all of which are currently unchecked:

- ☐ Billing Administration
- ☐ Forms Administration
- ☐ Shared Organization Administration
- ☐ Staff Administration

- Shared Administration (available only to agencies set up as multiple organizations in eR)
 - Access linked/shared organizations (e.g., foster care and residential orgs)
 - Any additional restricted admin capabilities granted to this user (e.g., billing admin, forms admin, and staff admin) are also available within shared organizations
- Staff Administration
 - HR staff
 - Add + edit Staff Records (not User ID's), access personal staff data, expiration dates, add staff training and documents

Security Rights

- Navigation – Determines Left-side Menu Options
 - My Stuff
 - Case Menus
 - Home Menus
 - Summaries Menus
 - Search and Others – linked cases, staff profiles, branches, etc.
- Misc. Permissions
 - Change information
 - Manage Referrals, Address Book or Shared Files
 - Access or Restrict Access to Information, Activities or Reports

Navigation:	<input checked="" type="checkbox"/> Access My Stuff Menus
	<input checked="" type="checkbox"/> Access Cases Menus
	<input checked="" type="checkbox"/> Access Homes Menus
	<input checked="" type="checkbox"/> Access Summaries Menus
	<input checked="" type="checkbox"/> Use Search
	<input checked="" type="checkbox"/> Modify Workspace Setup
	<input type="checkbox"/> Modify Other Options (Status Email, Download Folder, etc.)
	<input checked="" type="checkbox"/> Navigate to Linked Cases
	<input checked="" type="checkbox"/> Navigate to Staff Profiles
	<input checked="" type="checkbox"/> Navigate to other Branch (s)
Misc. Permissions:	<input checked="" type="checkbox"/> Change Client Name
	<input type="checkbox"/> Change Case Number
	<input type="checkbox"/> Change Customer Number
	<input type="checkbox"/> Change Funding Organization
	<input type="checkbox"/> Change Due Dates / Delete Activities + Reports with Due Dates
	<input type="checkbox"/> Allow 'Stop Tracking Expiration' Dates on Activities + Reports
	<input type="checkbox"/> Change Home Number
	<input type="checkbox"/> Change Rate Level
	<input type="checkbox"/> Change Vendor Number
	<input type="checkbox"/> Manage Referrals
	<input type="checkbox"/> Undo/Modify Discharge on Cases and Homes
	<input checked="" type="checkbox"/> Manage Address Book
	<input checked="" type="checkbox"/> Manage Shared Forms + Files
	<input type="checkbox"/> Enters casework on behalf of others (select any staff name for "Performed By"/"Approved By")
	<input type="checkbox"/> Access confidential information for all cases
	<input type="checkbox"/> Access confidential information for all cases in user's Branch

Staff Profile

- Required when a new employee's role includes working with cases or homes
- Collects information such as demographics, supervisor, signature, credentials, phone numbers, hire date, and other information
- 2nd step for adding a new hire following creating a User ID, if you did not check the box to automatically create the Staff Profile
- Intake Worker – indicates that a worker is only doing intakes so they will not be counted as a caseworker change in the stats
- Does Not Perform Casework – removes staff name from staff fields on records, activities and reports (for executive or read only staff, etc.)

The screenshot displays a web-based form for creating a staff profile. At the top, there are tabs for 'General', 'Compliance', 'Documents', 'Training', and 'Comments'. The 'General' tab is selected and highlighted with a red box. Below the tabs, the form is divided into two main sections: 'General Information' and 'Signature'. The 'General Information' section contains various fields for personal and professional details, including status, user ID, names, gender, race, hire date, employment type, hours per week, termination date, agency, branch, supervisor, type, title, credentials, license number, phone numbers, fax, email, provider ID, ID/load number, taxonomy code, and rate level. The 'Signature' section includes a text prompt and a large area for uploading a signature image. The form is styled with a light blue background and white text.

General Information	
Status:	Active
User ID:	Jessica Jones
Last Name:	Jones
First Name:	Jessica
Middle Name:	
Nickname/AKA:	
Gender:	- Not Specified -
Race:	- Not Specified -
Hire Date:	
Employment:	Full-Time
Hours/Week:	40
Termination Date:	
Agency:	Enchanted Family Services (Storeybrook)
Branch:	Wish Realm
Supervisor:	Ginnifer Supervisor
Type:	Private Agency Staff
Title:	Case Manager
Credentials:	
License #:	
Main Phone:	
Mobile Phone:	
FAX:	
E-Mail:	jesjones@efs.org
Provider ID (NPI):	
ID/Load #:	
Taxonomy Code:	- Not Specified -
Rate Level:	- Not Specified -
<input type="checkbox"/> Intake Worker	
<input type="checkbox"/> Does Not Perform Casework	

Signature

Attach an approx 260w x 50h png, gif, or jpg image file of this person's signature:

Inbox (Package Specific)

- 3rd Step if you did not check box to automatically create when adding new User ID
- Go to Administration > Organization Settings > Inboxes
- Add name, email address, select program(s) and user
- Could create a group inbox email also, if appropriate

General Advanced Comments

Inbox Settings

Inbox Name: **Organization:** Enchanted Family Services

Email Address: Email address takes 10 minutes to activate.

Documents can be assigned to cases in these programs:

- ☒ EFS Community Services
- ☒ EFS Foster Care
- ☒ EFS Kinship

Allow these users to access this inbox from their workspace:

<input type="checkbox"/> Colin O'Donoghue	<input type="checkbox"/> Ginnifer Supervisor	<input type="checkbox"/> Jennifer Morrison
<input checked="" type="checkbox"/> Jessica Jones	<input type="checkbox"/> Josh Dallas	<input type="checkbox"/> Lana Parilla
<input type="checkbox"/> Robert Carlyle		

User Group

- Same Security Rights options found on User ID
- Set permissions for a specific group of staff (interns, case manager, direct care staff, supervisors, etc.)
- Changes to permissions will automatically apply to all associated staff
- List of group members displays at bottom (names are links to User IDs)

General

Comments

Group Information

Group Name:

Caseworkers

Organization:

Enchanted Family Services (Storeybrook)

Description:

Child case worker

Security Rights

Administrator:

No

Type	Add	Delete	Edit	Approve	Complete
Cases:	No	No	Yes	-	-
Case Activities:	Yes	Yes	Yes	No	Yes
Case Reports:	Yes	Yes	Yes	No	Yes
Homes:	No	No	Yes	-	-
Home Activities:	Yes	Yes	Yes	No	Yes
Home Reports:	Yes	Yes	Yes	No	Yes

Navigation:

Access My Stuff Menus
Access Cases Menus
Access Homes Menus
Access Summaries (Resources Only)
Use Search
Modify Workspace Setup
Modify Other Options (Status Email, Download Folder, etc.)
Navigate to Linked Cases
Navigate to Staff Profiles

Misc. Permissions:

Change Client Name
Manage Address Book
Manage Shared Forms + Files

Group Members (5)

Dallas, Josh

Jones, Jessica

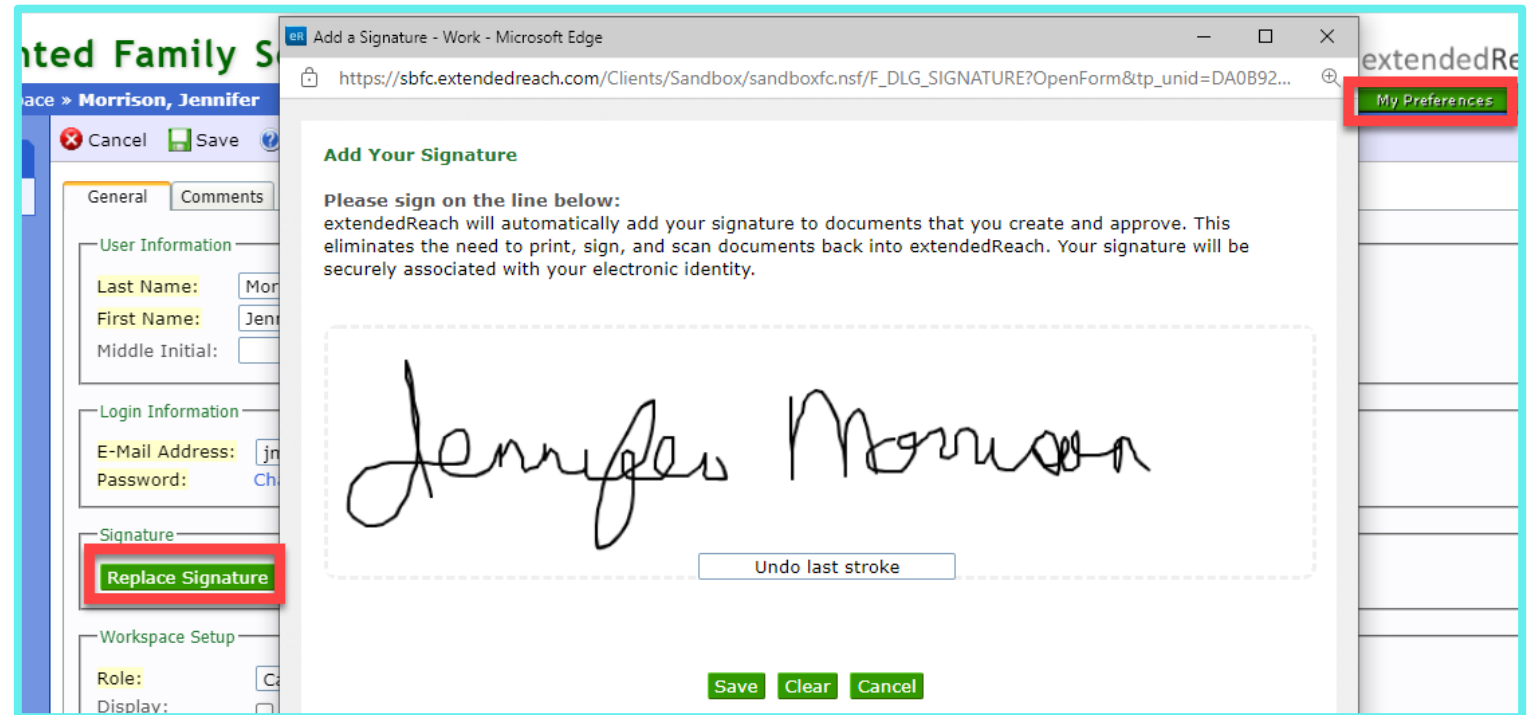
Morrison, Jennifer

O'Donoghue, Colin

Parilla, Lana

Signatures – Add through My Preferences

- User can add their own signature by clicking My Preferences in right upper corner of workspace and then clicking Replace Signature
- Use mouse, keypad or touch screen to sign
- Save



Upload Signatures

- To upload a new signature:
 - Have staff sign a white index card or blank unlined paper
 - Use dark ink and include credentials, if applicable
 - Print name on back in case signature is not legible to person who will scan and upload it to eR
 - Scan and save as a PNG, GIF or JPG file (approx. 260w x 50h). Crop as much white space around signature as possible or it will appear small. Use Microsoft Paint, Snipping Tool or Snagit to resize it.
- Navigate to Administration > Org Settings > Staff Profile and select user.
- Click edit, scroll to signature box and click paperclip.
- Select signature image file from your computer and save.

The screenshot displays the 'General Information' tab of a staff profile form. The form is divided into two columns. The left column contains fields for personal and employment details, while the right column contains organizational and contact information. At the bottom, a 'Signature' section is highlighted with a red box, featuring a paperclip icon and the text 'Attach File'. The form is titled 'General Information' and has tabs for 'General', 'Compliance', 'Documents', 'Training', and 'Comments'.

General Information	
Status:	Active
User ID:	Jessica Jones
Last Name:	Jones
First Name:	Jessica
Middle Name:	
Nickname/AKA:	
Gender:	- Not Specified -
Race:	- Not Specified -
Hire Date:	
Employment:	Full-Time
Hours/Week:	40
Termination Date:	
Agency:	Enchanted Family Services (Storeybrook)
Branch:	Wish Realm
Supervisor:	- Self Supervised -
Type:	Private Agency Staff
Title:	Case Manager
Credentials:	
License #:	
Main Phone:	
Mobile Phone:	
FAX:	
E-Mail:	jesjones@efs.org
Provider ID (NPI):	
ID/Load #:	
Taxonomy Code:	- Not Specified -
Rate Level:	- Not Specified -
<input type="checkbox"/> Intake Worker	
<input type="checkbox"/> Does Not Perform Casework	

Signature

Attach an approx 260w x 50h png, gif, or jpg image file of this person's signature:

Attach File

Staff Documents & Training

General **Compliance** Documents Training Comments

Documents

- Application of Employment 04/12/2021
- Background Check Expires 04/15/2024
- Diploma or GED 12/08/2020
- Quarterly Evaluation Report - Add Document -
- References 03/17/2021

Training

- CPR - Add Training -
- Cultural Diversity 07/23/2021
- De-escalation - Add Training -

General Compliance Documents **Training** Comments

[Print Training Log](#)

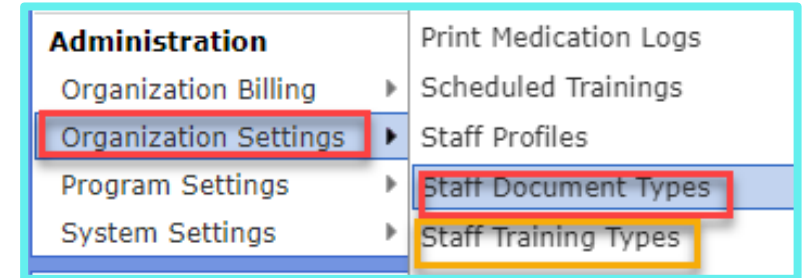
Period	Date	Topic	Expires	Hours
01/01/2021 - 12/31/2021				2.00
	07/23/2021	Cultural Diversity		2.00
				2.00

General Compliance **Documents** Training Comments

Date	Title	Expires
04/15/2021	Background Check	04/15/2024
04/12/2021	Application of Employment	
03/17/2021	References	
12/08/2020	Diploma or GED	

Staff Documents

- Navigate to Organization Settings > Staff Document Types > Click Add Document Type
- Add Name of Document
- Select Expiration Date (range = None, User Specified, 1-24 months, 48 & 60 months)
- Check Mandatory (Show on Compliance Tab), if applicable
- If Custom Form, click Custom Tab and enter custom form builder fields



A screenshot of the 'Staff Document Type' form. The 'General' tab is selected. The form fields are: Name (Quarterly Evaluation Report), Organization (Enchanted Family Services), Expiration (3 Months), and Options (Mandatory (Show on Compliance Tab) is checked). The 'Inactive' checkbox is unchecked.

A screenshot of the 'Custom Fields' form. The 'Custom' tab is selected. The form fields are: Date (empty), Quarter (- Not Specified -), Work Performance (Good, Ok, Bad), and Comments (empty). The 'Settings' tab is also visible, showing fields for Label, Comments, Default, Copy Most Recent (if available), Width (100%), and Height (Large).

Staff Training Types

- Navigate to Organization Settings > Staff Document Types > Click Add Training Type
- Add Topic
- Enter # Hours
- Select Expiration Date (range = None, User Specified, 1-24 months, 48 & 60 months)
- Check Mandatory (Show on Compliance Tab), if applicable
- If Custom Form, click Custom Tab and enter custom form builder fields

This screenshot shows the 'General' tab of the 'Staff Training Type' configuration interface. It includes fields for 'Topic' (CPR), 'Organization' (Enchanted Family Services), '# Hours' (4.00), 'Expiration' (User Specified), and 'Options' (Mandatory checkbox checked). An 'Inactive' checkbox is also present.

General		Custom	Comments
Staff Training Type			
Topic:	CPR	Organization:	Enchanted Family Services
# Hours:	4.00	<input type="checkbox"/> Inactive	
Expiration:	User Specified ▼		
Options:	<input checked="" type="checkbox"/> Mandatory (Show on Compliance Tab)		

This screenshot shows the 'Custom' tab of the 'Staff Training Type' configuration interface. It features a large dashed box labeled 'Add Fields Here' and a sidebar with 'Add a Field' and 'Settings' buttons. The sidebar lists various field types: Section Break, Guidelines\Help Text, Single Line Text, Date, Time, and Number.

General	Custom	Comments
Custom Fields		
Add Fields Here		
		Add a Field Settings
		H Section Break
		i Guidelines\Help Text
		A Single Line Text
		📅 Date
		🕒 Time
		# Number

Summaries > Staff Reports

- Directory – list of staff and contact information
- Training
- Events + Expirations
- Compliance Tracking

you are here: Staff > Directory by Last Name

Group Staff Add Staff Profile Excel Help

Name	Branch	Title	Phone	E-Mail	Supervisor	Credentials
Carlyle, Robert	Wish Realm	Program Manager		robert@efs.org	- Self Supervised -	
Dallas, Josh	Neverland	Caseworker		josh@efs.org	Ginnifer Supervisor	
Jones, Jessica	Wish Realm	System Admin		jesjones@efs.org	- Self Supervised -	
Morrison, Jennifer	Wish Realm	Caseworker		jm@efs.org	Robert Carlyle	
Nice, Jamie	Wish Realm	Supervisor		jnice@yahoo.com	Ginnifer Supervisor	
Nurse, Agency	Neverland			nurse@agencyemail.com	- Self Supervised -	
O'Donoghue, Colin	Neverland	Caseworker		colin@EFS.org	Ginnifer Supervisor	
Sudlow, Jenny	Wonderland	Case Aid		Sudlowj@agencyemail.com	Ginnifer Supervisor	
Supervisor, Ginnifer	Neverland	Program Manager		ginnifer@efs.org	- Self Supervised -	
9						

Staff Directory Training Events + Expirations Compliance Tracking

Summaries > Staff Reports

- Directory – access staff profile records:
 - Compliance
 - Documents
 - Training and
 - Comments tabs

This screenshot shows the 'Compliance' tab selected. It contains two sections: 'Documents' and 'Training'. The 'Documents' section lists several items with their expiration dates, while the 'Training' section lists training topics with links to add more training.

Documents	
Annual Evaluation	Expires 10/07/2022
Application of Employment	04/12/2021
Background Check	Expires 04/15/2024
Diploma or GED	12/08/2020
Quarterly Evaluation Report	- Add Document -
References	03/17/2021

Training	
CPR	- Add Training -
CPR/First Aid	- Add Training -
Cultural Diversity	07/23/2021
De-escalation	- Add Training -

This screenshot shows the 'Documents' tab selected. It displays a table of documents with columns for Date, Title, and Expires.

Date	Title	Expires
10/14/2021	TB Test	
10/07/2021	Annual Evaluation	10/07/2022
04/15/2021	Background Check	04/15/2024
04/12/2021	Application of Employment	
03/17/2021	References	
12/08/2020	Diploma or GED	

This screenshot shows the 'Training' tab selected. It displays a table of training sessions with columns for Period, Date, Topic, Expires, and Hours. A 'Print Training Log' link is visible in the top right corner.

Period	Date	Topic	Expires	Hours
2021				4.00
	10/14/2021	Managing Aggressive Behaviors		2.00
	07/23/2021	Cultural Diversity		2.00
				4.00

This screenshot shows the 'Comments' tab selected. It displays a text area containing a comment about the staff member's employment history.

Hired 2/5/2010 - 3/10/2015 worked as case manager
Re-hired 4/5/2020 as a case manager

Summaries > Staff Reports

- Training
 - Add Training for Multiple Staff
- Events + Expirations

The screenshot shows the 'My Tasks' sidebar menu. The 'Events + Expirations' option under the 'Administration' section is highlighted with a red box. A mouse cursor is pointing at it.

My Tasks

- Cases**
 - Case Rosters
 - Case Tasks
- Homes**
 - Home Rosters
 - Home Tasks
 - HomeMatch™
- Summaries**
 - Dashboard
 - Casework
 - Demographics
 - Intake
 - Discharge
- Staff**
- Resources**
- Administration**
 - Events + Expirations

Group Events **Help**

Date	Title	Name
06/09/2023	Background Check Expires	O'Donoghue, Colin
04/15/2024	Background Check Expires	Dallas, Josh
08/05/2025	Background Check Expires	Jones, Jessica

The screenshot shows the 'Add Training for Multiple Staff' window. The window title is 'Add Training for Multiple Staff' with an Excel icon and a Help icon. The table below lists training classes with columns: # Classes, Hours, Date, Topic, Branch, Instructor, and Location.

# Classes	Hours	Date	Topic	Branch	Instructor	Location
4	8.00	01/01/2021 - 12/31/2021				
1	2.00	07/23/2021	Cultural Diversity	Wish Realm	Carlyle, Robert	
1	2.00	07/23/2021	Cultural Diversity	Neverland	Dallas, Josh	
1	2.00	07/23/2021	Cultural Diversity	Neverland	Morrison, Jennifer	
1	2.00	07/23/2021	Cultural Diversity	Wish Realm	Supervisor, Ginnifer	
1	2.00	07/23/2021	Cultural Diversity	Neverland		
4	8.00					

My Tasks

- Cases**
 - Case Rosters
 - Case Tasks
- Homes**
 - Home Rosters
 - Home Tasks
 - HomeMatch™
- Summaries**
 - Dashboard
 - Casework
 - Demographics
 - Intake
 - Discharge
- Staff**
- Resources**
- Administration**
 - Events + Expirations

Staff **Training**

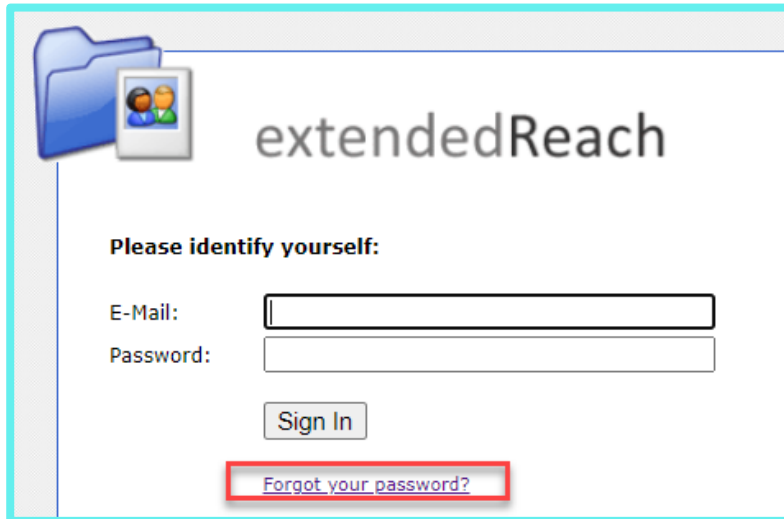
Summaries > Staff Reports

- Compliance Tracking – visual representation of last document or training added for each staff

Excel Help				
Staff Name	Branch	Annual Evaluation	Application of Employment	Background Check
Carlyle, Robert	Wish Realm	Missing	08/05/2021	04/14/2021
Dallas, Josh	Neverland	10/07/2022 (Expires)	04/12/2021	04/15/2024 (Expires)
Jones, Jessica	Wish Realm	02/25/2022 (Expired)	08/04/2021	08/05/2025 (Expires)
Morrison, Jennifer	Wish Realm	Missing	Missing	Missing
Nice, Jamie	Wish Realm	Missing	Missing	Missing
Nurse, Agency	Neverland	Missing	Missing	Missing
O'Donoghue, Colin	Neverland	Missing	Missing	06/09/2023 (Expires)
Sudlow, Jenny	Wonderland	Missing	Missing	Missing
Supervisor, Ginnifer	Neverland	Missing	Missing	Missing

Staff Management – Reset Passwords

- Users can reset their own password by clicking “Forgot password” link on login screen
- System Admin can reset under Administration > Organization Settings > User IDs
 - Edit User ID record
 - Click Change Password and enter/confirm new password
 - Check box to force password change on next login
 - Send Welcome Email – this will give user their new temporary password as well as remind them of their username



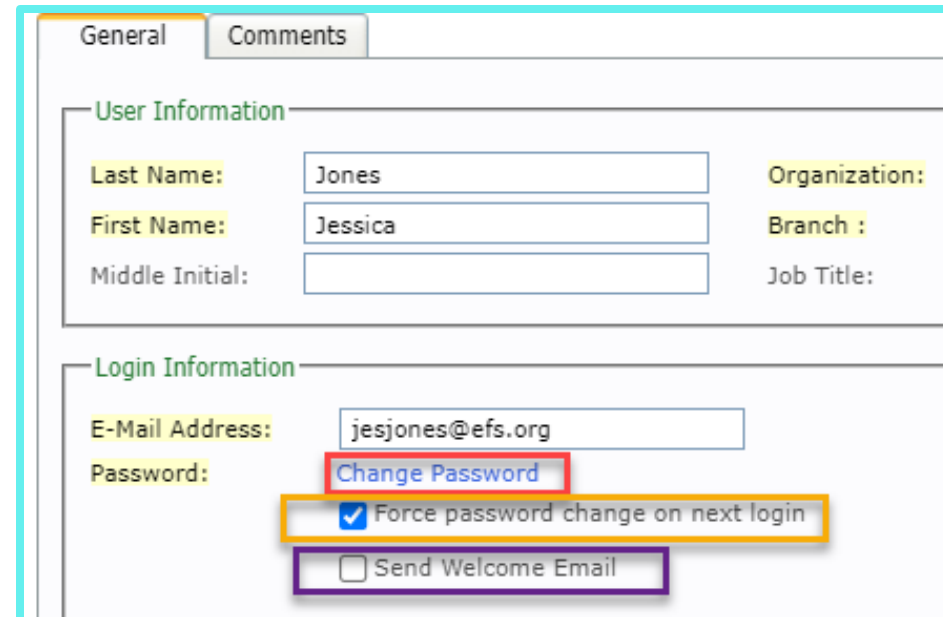
extendedReach

Please identify yourself:

E-Mail:

Password:

[Forgot your password?](#)



General Comments

User Information

Last Name: Organization:

First Name: Branch:

Middle Initial: Job Title:

Login Information

E-Mail Address:

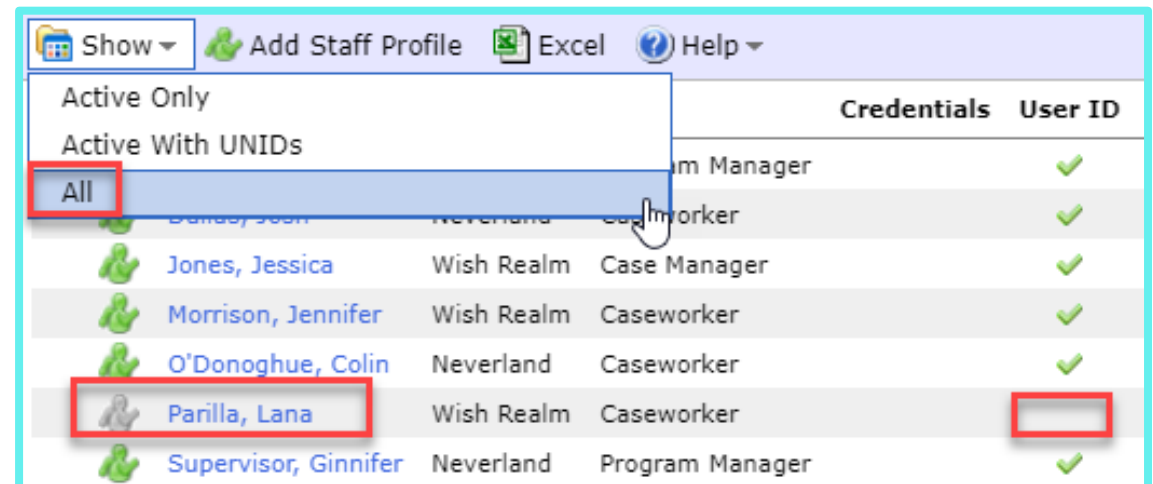
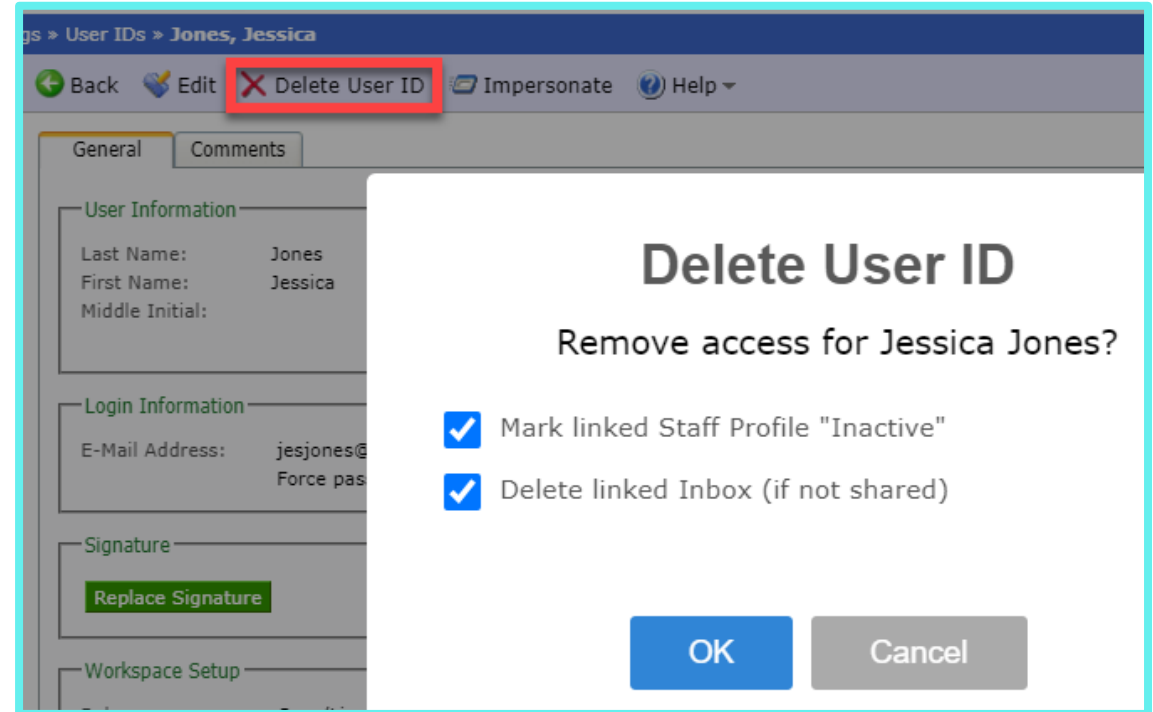
Password: [Change Password](#)

☒ Force password change on next login

☐ Send Welcome Email

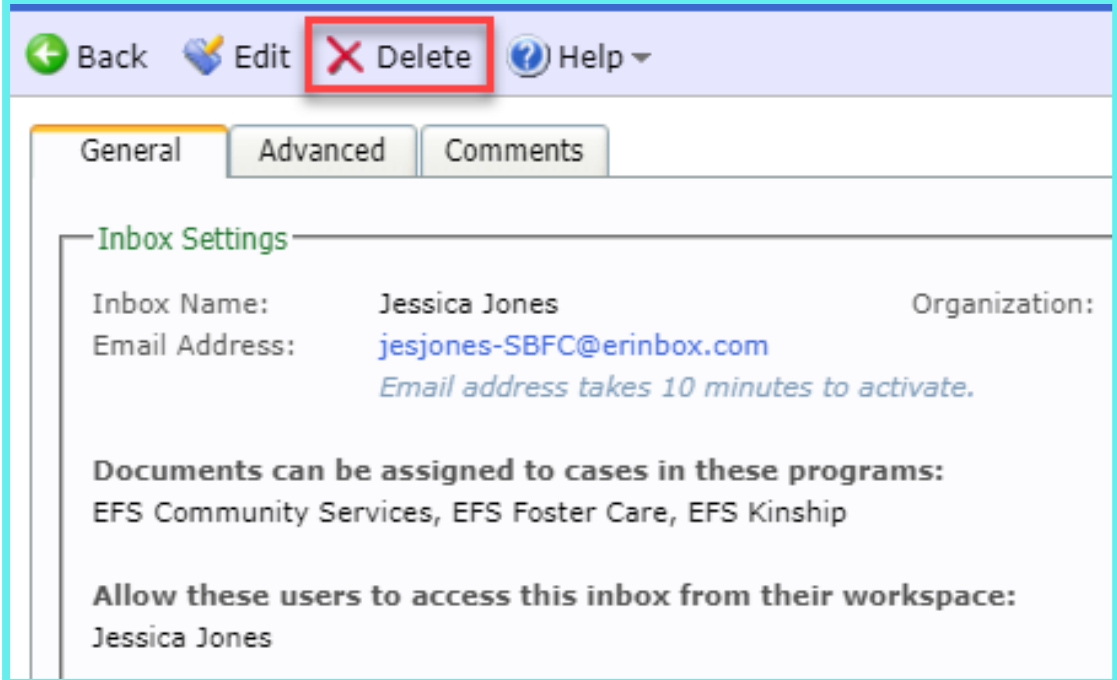
Staff Management – Inactivate Users

- Navigate to Administration > Organization Settings > User ID
 - Select Staff from List
 - Click Delete User ID (prevents user from logging into the system)
 - Leave box checked to inactivate staff profile
 - If applicable, leave box checked to delete linked Inbox
- Access inactive staff under Staff Profiles – Show All to re-activate if they return
 - No User ID indicates they cannot login



Staff Management – Inactivate Inbox

- Navigate to Administration > Organization Settings > Inboxes
- Select User's Inbox
- Click Delete from top menu

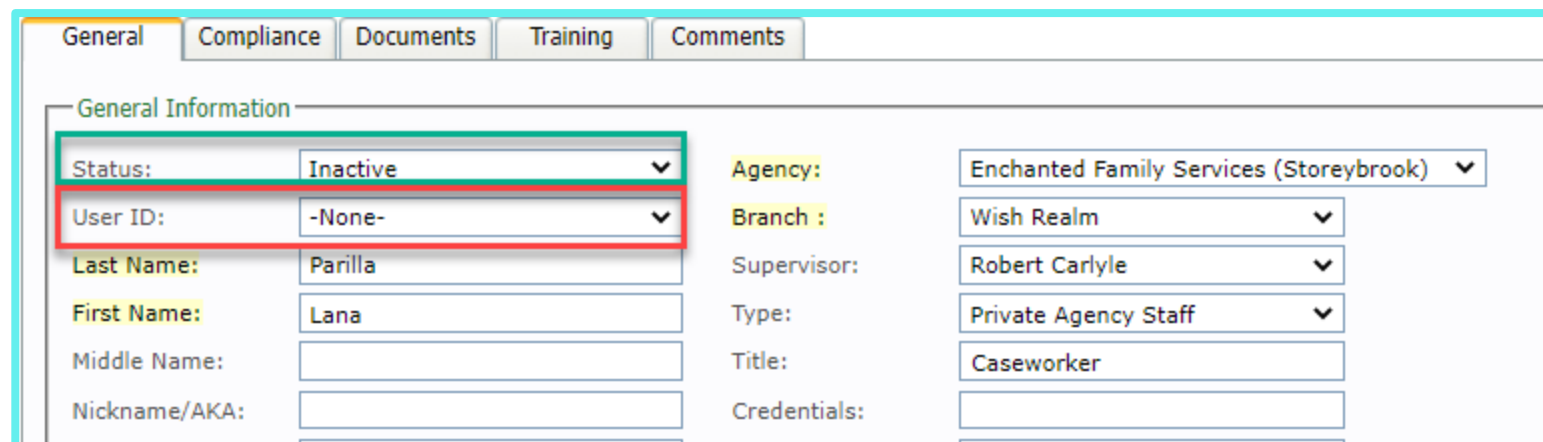


The screenshot shows a web application interface for managing inboxes. At the top, there is a navigation bar with four buttons: 'Back' (green left arrow), 'Edit' (pencil icon), 'Delete' (red 'X' icon, highlighted with a red rectangular box), and 'Help' (blue question mark icon with a dropdown arrow). Below the navigation bar are three tabs: 'General' (selected), 'Advanced', and 'Comments'. The main content area is titled 'Inbox Settings' in green. It contains the following information:

- Inbox Name:** Jessica Jones
- Email Address:** jesjones-SBFC@erinbox.com
- Organization:** (blank)
- Email address takes 10 minutes to activate.*
- Documents can be assigned to cases in these programs:**
EFS Community Services, EFS Foster Care, EFS Kinship
- Allow these users to access this inbox from their workspace:**
Jessica Jones

Staff Management – Re-activate User

- Add User ID but don't select create and link staff profile
- Go to Staff Profiles > Show All to access inactive staff profile. Edit the record and change Status to active and select the User ID to connect the records.
- Update other information, as applicable



The screenshot shows a web-based staff management interface. At the top, there are tabs for 'General', 'Compliance', 'Documents', 'Training', and 'Comments'. The 'General' tab is selected. Below the tabs is a section titled 'General Information'. Within this section, the 'Status' dropdown menu is set to 'Inactive' and the 'User ID' dropdown menu is set to '-None-'. Both of these dropdowns are highlighted with a red rectangular border. To the right of these fields, there are several other dropdown menus: 'Agency' (set to 'Enchanted Family Services (Storeybrook)'), 'Branch' (set to 'Wish Realm'), 'Supervisor' (set to 'Robert Carlyle'), 'Type' (set to 'Private Agency Staff'), and 'Title' (set to 'Caseworker'). Below these are text input fields for 'Last Name' (Parilla), 'First Name' (Lana), 'Middle Name', and 'Nickname/AKA'. At the bottom, there is a 'Credentials' field.

General Information	
Status:	Inactive
User ID:	-None-
Last Name:	Parilla
First Name:	Lana
Middle Name:	
Nickname/AKA:	
Agency:	Enchanted Family Services (Storeybrook)
Branch :	Wish Realm
Supervisor:	Robert Carlyle
Type:	Private Agency Staff
Title:	Caseworker
Credentials:	

Support Resources



Your Agency's
System
Administrator



Access the
User Guide



Submit a
Support Ticket

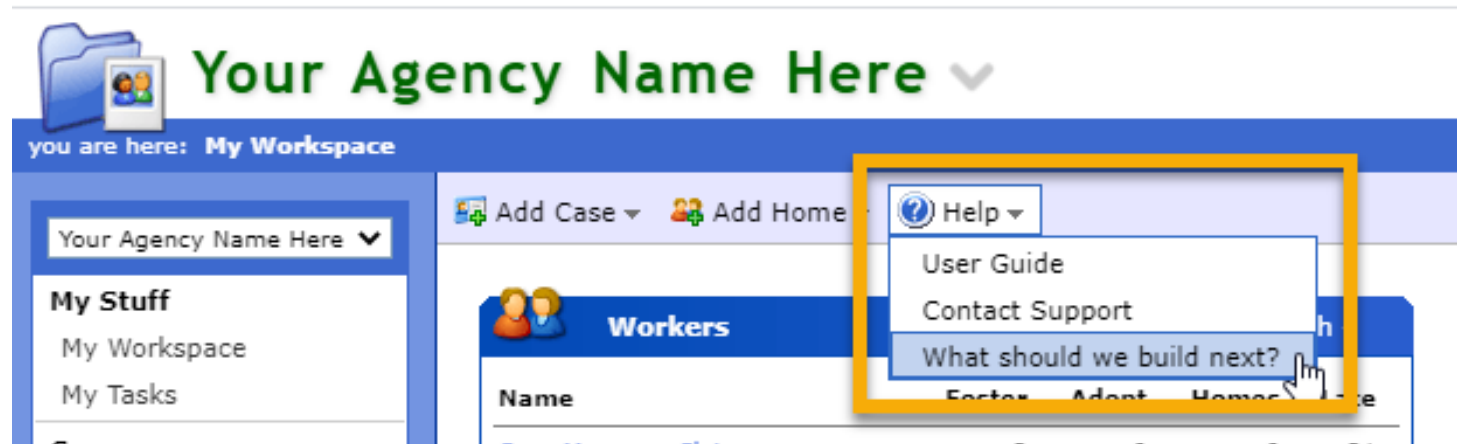
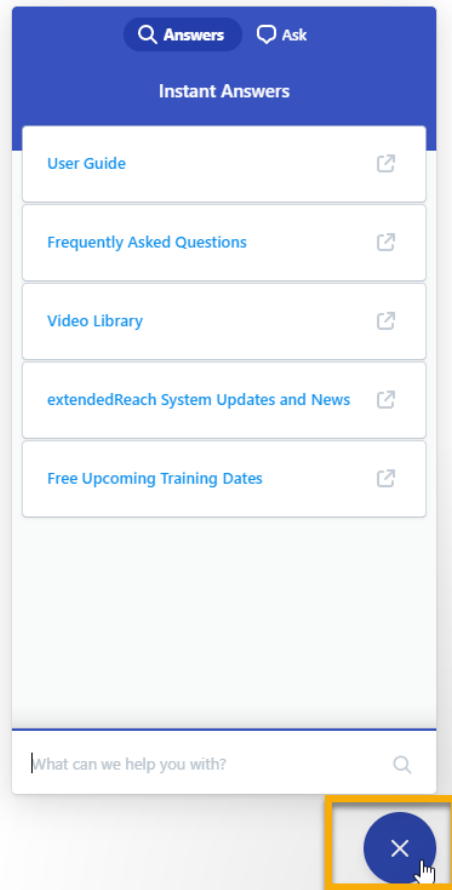


Contact your
Customer
Success Manager



Submit an Idea

Support Resources



QUESTION --- & ANSWER