OHIO DEPARTMENT OF EDUCATION

Connected Ohio Records for Educators (CORE)

My Educator Profile
User Manual

My Educator Profile User Manual

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CORE Overview

The Connected Ohio Records for Educators (CORE) system manages all aspects of educator licensing from graduation through retirements. The application is divided into six modules: Credential Eligibility, Finance, Professional Conduct, Pupil Activity, Resident Educator, and LPDC. The Credential Eligibility module is the heart of the CORE system. This module maintains records for educators on all credentials for which they have applied for, and the outcome of each application. Historical information is maintained on all educators for reporting and tracking purposes. The Finance module is used to manage all monetary transactions regarding Licensure. All processing and application fees are tracked through this system. Professional Conduct investigates any legal questions regarding an educator's qualification to teach in the State of Ohio. Applications can be denied for professional conduct reasons and existing licenses can be revoked or voided through this module. The Pupil Activity module tracks programs offered by providers of pupil activity training, and the registrants in these programs. The Resident Educator module tracks educators after they receive their initial license for assessment in becoming eligible for Professional licensing in the State of Ohio. The LPDC module allows LPDC organizations to register and set up their schools, signers, and signature documents.

Accessing the System

SAFE Login

Access to the CORE My Educator Profile system is controlled through the Secure Application for Enterprise (SAFE) portal. An end-user must have a SAFE account in order to access the CORE System. Access the main ODE web page by going to www.ode.state.oh.us, a page similar to Figure OA.1 below will be displayed.
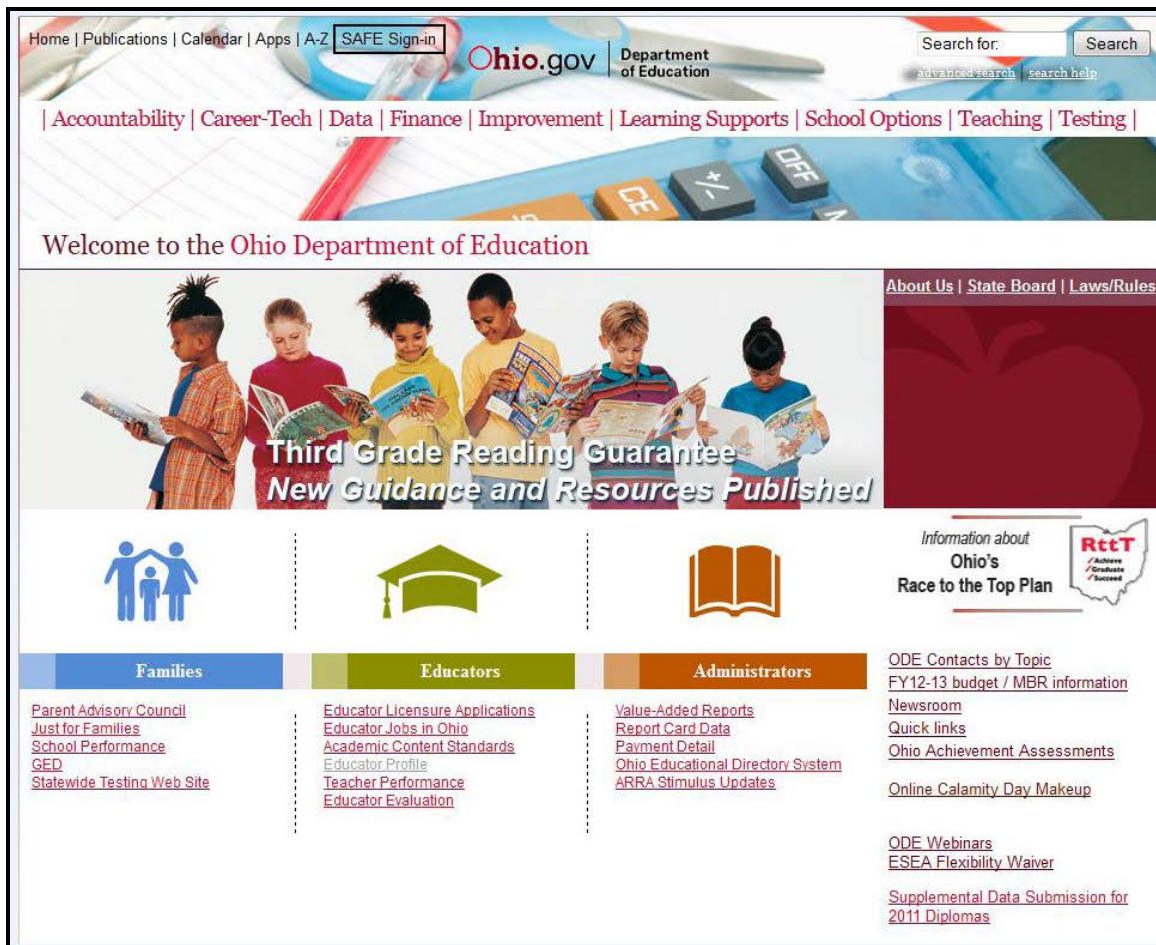

Figure OA.1 – ODE Home Page

Click on the SAFE Sign-In link (in the menu at the top left of the page). The SAFE Sign In page (Figure OA.2) is displayed.

Figure OA.2 – SAFE Sign In Page

Enter your Account Name and Password and click **Sign In**. If a SAFE account is needed, click the Sign Up button below and to the left of the Sign-In section and follow the instructions for creating a SAFE account. If the "Invalid Password" message is displayed, click the Forgot user name or password link and follow the instructions for having the password e-mailed to you. After a successful login, the SAFE Menu (Figure OA.3) is displayed.

Figure OA.3 – SAFE Menu

The number of items on this menu will vary widely depending on the permissions for the account that is logged in. To access CORE, click the ODE.CORE link. This link has been highlighted by a border in the figure above for illustrative purposes. The main CORE Portal Page is displayed (Figure OA.4).

Figure OA.4 – CORE Main Menu

Navigating and Sorting

On many of the pages within the system, grids like the one shown in Figure OA.6 are used to display and manage data. On the grids the number of items listed per page can be changed by using the drop-down selection list in the bar above or below the grid. Navigation to additional pages is done by clicking on the page number at the center of the navigation bar (ex. 1/30).

Grids can be sorted by clicking on the arrows in any of the column headers. A triangle icon will appear just to the right of the column header name to indicate the sort order. An upward pointing triangle indicates the column is sorted in ascending order, a downward pointing triangle indicates descending.

SSN	Name	Birth Date	State Id
809214387	Jones Alan	9/28/1950	OH1217828
542034561	Jones Alan	1/28/1956	OH1188052
662429408	Jones Alice	12/20/1945	TN1003600
466757778	Jones Alicia	5/15/1974	OH1407211
151611414	Jones Alisa	3/6/1977	OH1306158
596593765	Jones Allison	9/13/1958	OS1007188
308494646	Jones Amy	3/29/1972	OH1186905
635036247	Jones Amy	1/19/1967	WL1002130
508307940	Jones Angela	8/19/1976	OH1248698
580128312	Jones Anita	11/15/1948	TN1003176

Search Person

Search on:

SSN: _____ (no hyphens)   State Id: _____ (XX9999999)
First Name: _____   Last Name: jones
Birth Date: _____   Middle Name: _____

Find Person

Search Result

1/30   10

Quick Search: _____

Close

My Educator Profile

The purpose of the "My Educator Profile" module is to provide a way to streamline the licensure process for educators, signers, and the Office of Licensure.   Similar to the "Educator Profile" lookup, "My Educator Profile" shows demographic and credentials information, only it is YOUR personal information. When each person signs on, they will see only their data. The system is made up of several sections, all under the general heading of "My Educator Profile": "My Information", "My Account", "My Applications", "My Credentials", "My Approvals", and "IPTI Registrations". The "My Information" section is used to review and edit the demographic information that is on file with the Ohio Department of Education. The" My Account" section is used for paying fees by credit card. Transaction history and current balances can also be reviewed in the My Account module. The "My Applications" page is used to apply for a new license, permit, or certificate; or view a list of application requests and the status of each. The "My Credentials" page is used to view a list of your credentials (active and historical) along with their dates and status. Online renewals, advances, transitions, corrections and reprints may also be done from this page.   "My Approvals" is for persons with the security role of 'LPDC Chair/Designee', 'Superintendent/Designee', 'Dean College of Education/Designee', or 'Credential e-Signer'. This is where a signer will enroll as a credential e-Signer. After enrolling, the " My Approvals" screen will display application requests which are waiting for online signature approval. The IPTI Registration module is used to electronically register for the IPTI program. My Educator Profile is available to anyone with a SAFE account.

My Information

The "My Information" section of the My Educator Profile module used to maintain the demographic information that is stored in OEDS-R (Ohio Educator Directory Service).   When you change or update your information using the CORE system, it will automatically update OEDS-R (and thus your SAFE account).

To access the "My Information" page:

1. Login to the SAFE portal.

2. Click on ODE.CORE link from the SAFE menu.

3. On the main CORE menu, hover over the "My Educator Profile" apple to bring up the drop down menu, and click on "My Information", or just click on the apple next to 'My Educator Profile'.
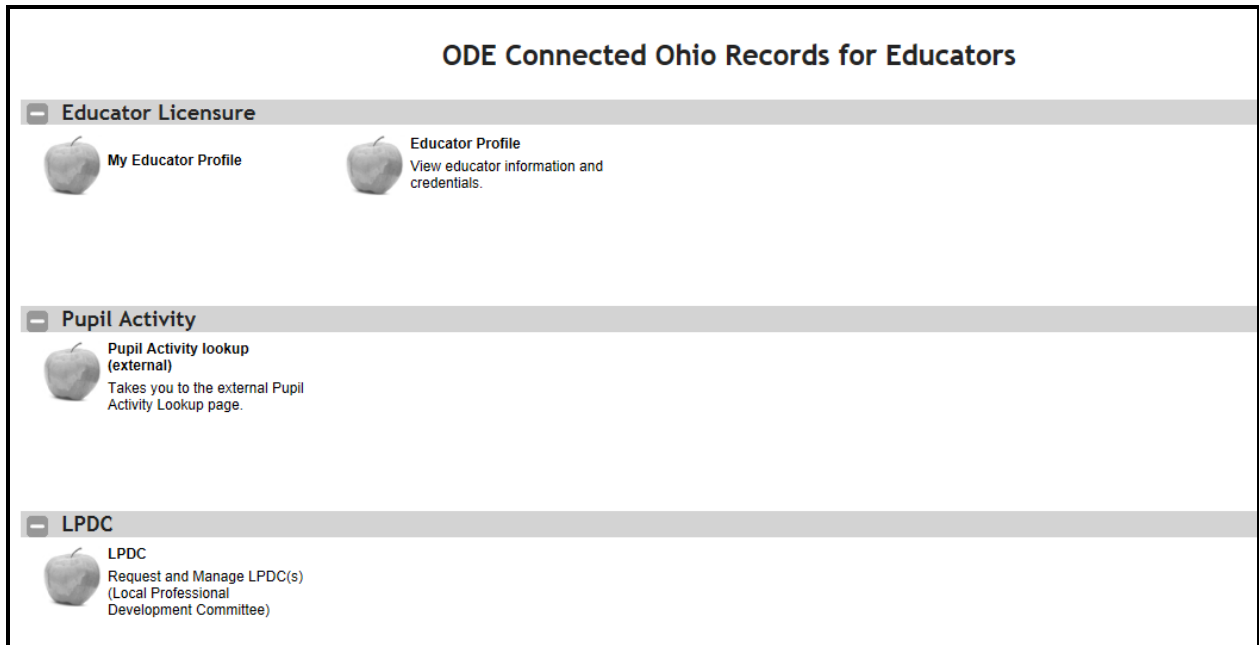
ODE Connected Ohio Records for Educators

Educator Licensure

My Educator Profile

Educator Profile
View educator information and credentials.

Pupil Activity

Pupil Activity lookup (external)
Takes you to the external Pupil Activity Lookup page.

LPDC

LPDC
Request and Manage LPDC(s) (Local Professional Development Committee)

Figure OA.5 – CORE Main Menu

4. The "My Information" page (Figure OA.6) is displayed and populated with the information from OEDS-R (Personal Information section).

5. Update any information in the Personal Information section (Address, Phone or Email) that is incorrect or has changed.

6. Click **Save** to commit changes.

Figure OA.6 – My Information

> You will be required to have certain demographic information set up in order to start an online application, or become a credential e-Signer. Please make sure you have your Primary Address, Email, and Phone Number entered correctly. You will also need to have a State ID.

How do I request a State ID online?

A *State Staff Identification number* (State ID) is one type of common identifier created and assigned by the Ohio Department of Education to identify individual people. The State ID number is very helpful when linking person records with unique data records related to that person, such as educator licenses, PRAXIS data, BCI and FBI Background check data, etc. State IDs also help ODE staff identify and reduce the occurrence of duplicate person records in ODE databases.

If you are an Ohio licensed educator, or ever requested educator licensure from ODE, you already have a State ID. To search for your State ID, simply go to the CORE Educator Profile module at this location and

search for your information:
https://coreprodint.ode.state.oh.us/core2.3/ode.core.EducatorProfile.UI/EducatorSearch.aspx
If you searched the CORE Educator Profile module and a State ID did not appear with your unique record, you can request a State ID through the CORE My Educator Profile module. Here are the steps:

1. First, you'll need a SAFE (ODE secure access) account. If you do not have a SAFE account, you can create one. Please use this link and select the "Sign Up" button: https://safe.ode.state.oh.us/portal

2. After you've created a SAFE account, log into SAFE and select **"ODE.CORE"** from the SAFE Portal Menu (example below):
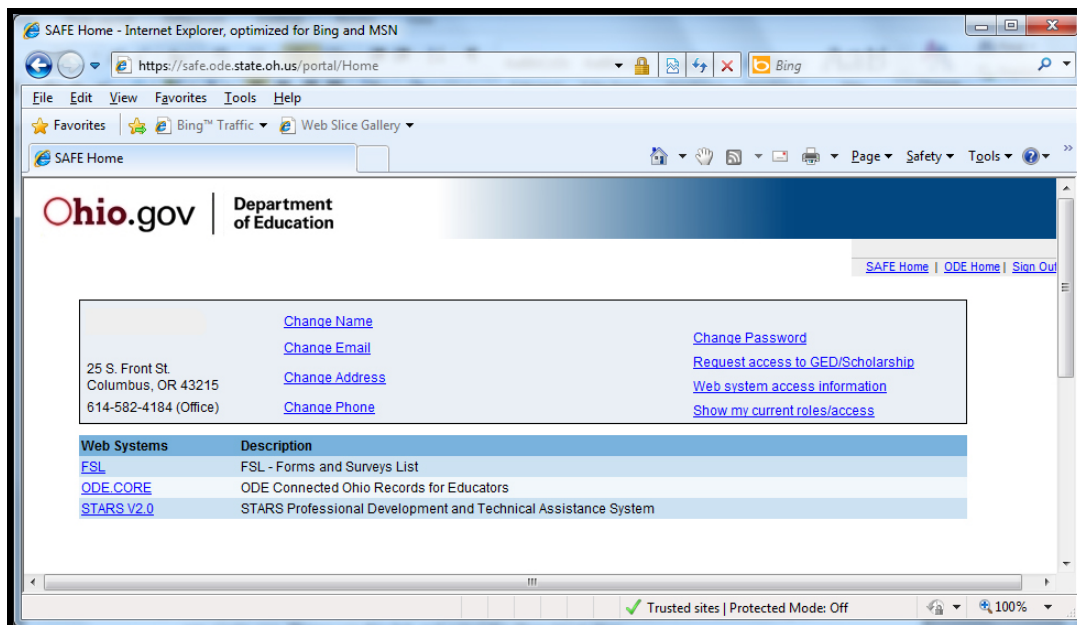
Figure OA.16 – SAFE Portal

3. Select **"My Educator Profile"** from the CORE Portal page:
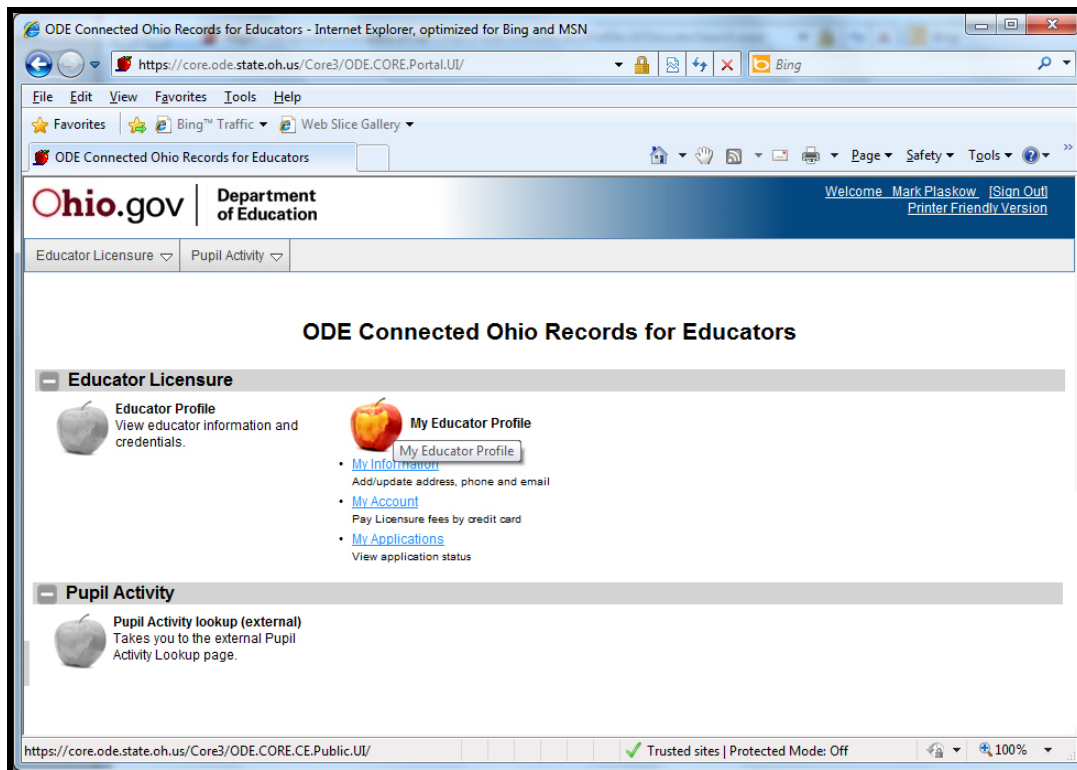
Figure OA.17 – CORE Main Menu

4. On the CORE My Educator Profile "My Information" page, select the **"Assign my State ID"** button, if it appears. **VERY IMPORTANT:** If you are a credentialed educator in the State of Ohio, you already own a State ID and it should display in the State ID cell of the Personal Information section. *IF* you are a credentialed educator in the State of Ohio *and* the "Assign My State ID" button appears, it is probable you have a duplicate record which requires maintenance in the ODE data system*. Please DO NOT click the "Assign My State ID" if you are a credentialed educator.* Instead, please contact ODE Educator Licensure Customer Support at Educator.Licensure@education.ohio.gov , and the duplicate records will be corrected. (See screenshot on next page).

Figure OA.18 – My Information

5. If you've provided the required information, the request for the State ID will be processed automatically and populate the "State ID:" field in the "My Information" table:

Figure OA.19 –State ID Processed Successfully

My Account

The "My Account" screen is used to review transaction history and pay for any licensure fees. Payments may be made by credit card for licensure applications, IPTI Registrations, any payments to cover an NSF, etc.

To access the "My Account" page, go to CORE as described in the "My Information' section. Then,

1. On the main CORE menu, hover over the "My Educator Profile" apple to bring up the drop down menu, and click on "My Account", or just click on the apple next to 'My Educator Profile'.

2. If you are already on a My Educator Profile screen, there will be a dropdown menu titled "My Educator Profile" in the top menu bar. Click on the dropdown, and select "My Account".

My Account

Educator Info

State ID: OH3000459   First Name: Mary   Last Name: Teacher   Birth date: 1/1/1900

Transaction History

If your current Account Balance is negative, that amount must be applied to your account before any requests on Payment Hold can be issued.

Current Account Balance: $0.00

Date	Description		Paid By	Fiscal Year	Amount
03/08/2013	License Issued		--	FY2013	$20.00
02/14/2013	Payment		Credit Card	FY2013	$20.00
01/24/2013	License Issued		--	FY2013	$200.00
01/17/2013	Payment		Credit Card	FY2013	$200.00

1/1   10

Credential Request

You have selected to pay for the credentials listed below. Please review this list and the amount due. If this is not correct, click here to select different application(s).

Action	Effective Year	Credential	Amount Due
New In State	2013	5 Year Professional License Administrative Specialist [Discounted]	$20.00

Payment Due

The total amount to be charged to your credit card is shown below. Click "Next" to continue with your credit card payment.

Current Account Balance: $0.00

Credential Payment: $20.00

Total Payment Amount: $20.00   Remaining Account Balance: $0.00

⊙ Next

Figure OA.7 – My Account

1. To pay for a license application: On the "My Applications" screen, click the checkbox next to the application being paid for.

Figure OA.8 – My Applications

2. <u>If there are no pending applications in the system for you at this time</u>, the system will automatically apply any existing positive available balance to the payment. If, however, you have an existing paper or online application which has been paid for but is not yet issued (is' Pending'), you will <u>not</u> be able to apply that money toward this new license payment.

3. If the existing balance should not be applied, click the checkbox marked "Do not apply positive balance to make payment" and the Total Amount Due will automatically change to reflect the new balance due.

4. Click Next.

5. The Credit Card Payment Billing Information page (Figure OA.9) is displayed next.

Figure OA.9 – Credit Card Payment – Billing Information

6. Complete all required fields and then click the "Submit Address" button.

7. Verify the address, and click on the "Next" button.

Figure OA.10 – Credit Card Payment – Billing Address Confirmation

8. Next you will enter your credit card information. Note: you must use a credit card – debit cards which require a pin number are not allowed at this time. Enter the required fields (marked with an *) in the Billing Information section. Click on the "What's this?" link under the CCV # field to learn where to find your CVV code on different types of credit cards. (Figure OA.10)

Figure OA.11 – Credit Card Payment – Credit Card Information

9. Click **Submit Payment**.

10. A confirmation will be displayed with a summary of the Amount being paid. Click **Pay** to confirm or **Back to Credit Card Details** to return to the previous screen.

11. If the payment is successful, the Credit Card Payment Confirmation page (Figure OA.12) is displayed. If the payment is not successful, an error message will be displayed with details about why the transaction failed. Correct any incorrect information and click **Submit** again.

Figure OA.12 – Payment Confirmation

12. Click the **Print Receipt** button to print the page. The receipt will open in a separate window. Click on the menu item "File", then "Print" to print a copy. A receipt will also be emailed to your email address.

13. Click the **Go to My Applications** button. You can see your application is now in the "Applications Submitted with Payment" section.

14. If you return to the My Account page (Figure OA.6) will be re-displayed. A new transaction with the description "Payment" will be displayed along with a Paid By of "Credit Card" and the amount. A second transaction with the description "License Issued" will also be displayed when your license gets issued.

Note for IPTI Registrations (Intensive Pedagogical Training Institute) only: When an IPTI Registration payment is pending, the screen in Figure OA.13 will be displayed.

Figure OA.13 – IPTI Registration Payment

My Applications

The My Applications module is used to view a list of all application requests submitted by an educator. The date of the request, the credential(s) included in the request, the type of the application (new/renewal), and the status are listed. If an application is pending review it may be edited or deleted. If it has already been issued or declined, it cannot be edited or deleted. A sample of the My Applications page is shown in Figure OA.13.

Figure OA.13 – My Applications

To edit an application request:

1. Click on the edit icon [✎] in the grey bar of the credential application needing to be edited. At this point you may change the Effective Year, the Mail To Address/Organization, the Background Check and Legal Questions, and the required signatures only. The credential itself cannot be changed. If you need to request a renewal of a different credential, you must delete the application request and resubmit a new one.

Renew Application Request

Educator Info

State ID: AA1111111   First Name: Kevin   Last Name: Stough   Birthdate: 10/10/1978

Renew Application Request

Credential: 1 Year Temporary Certificate - Occupational Therapist

Teaching Fields:
Academically Gifted - (196260)

Endorsements:
No endorsement fields are available for this credential

Effective Year: 2012 ▼

Valid In Organization: Dublin City School District   [🔍] [🗑]

Mail To Organization: Dublin City School District   [🔍] [🗑]

[➡ Next] [⊘ Cancel]

Figure OA.14 – Edit Application Request

2. To change the Valid In Org or the Mail To Org, click on the [🔍] icon and search for the organization by either the IRN or the name. Type in the IRN number or the full name/parts of the name and click"Find Organization".

Figure OA.15 – Search Organization

3. Click 'Next'.

4. The Background Checks and Signatures page will be displayed. Answer all of the background check and legal questions with either a Yes or No. If any legal question is answered as 'Yes', then the explanation box will be opened and you must enter an explanation for your answer.

5. Check the 'Applicant Signature' box to certify that all of the questions are answered truthfully and to verify your signature.

6. If a Superintendent, LPDC, or Dean signature is required for this application, the 'Signature' box will be displayed. To find the appropriate organization, click the Search icon [🔎] to open the Search Organization dialog box.

    a. Enter an IRN and/or Organization Name. (The Name field will automatically perform a wildcard search, so a search for 'Ohio State' will return all organizations which begin with the words 'Ohio State'. A search for '*Ohio' will return all organizations which have letters or words before the word 'Ohio'.)

    b. Click Find Organization.

    c. Click on the correct Organization to select.

    d. The Find Organization dialog box will close and the organization name will populate in the Organization field.

7. After selecting the correct organization, select the correct signer. A box will open with the possible signers. Click on the correct name, then click on 'Select Signature Person'. The name of the signer will populate in the Signature Person Name box.

8. Click on 'Submit' to submit the application. To cancel out and not submit, click on 'Cancel'. Any errors in the application will appear in red at the top of the screen. These must be corrected for a successful submission.

9. If the application was submitted successfully, the 'My Account' screen will be displayed for payment. (See Section titled 'My Account'.)

My Credentials

The My Credentials page is used to view a list of credentials for an educator along with their dates and status. If a credential is up for renewal, the Action box will be displayed.

Figure OA.16 – My Credentials

To renew a credential:

1. Click on the Action dropdown next to the credential to be renewed. Select the correct Effective Year for the renewal. Then click on the button 'Add Renew Request'.

Renew Application Request

Educator Info

State ID: AA1111112   First Name: Carol   Last Name: Myers   Birthdate: 8/16/1960

Renew Application Request

Credential: 1 Year Long Term Substitute License - Middle Childhood (4-9)

  Teaching Fields:

    No teaching fields are available for this credential

  Endorsements:

    No endorsement fields are available for this credential

Effective Year: 2011   ▾

Mail to Address: ○ School   ○ Home

[● Next]   [⊘ Cancel]

Figure OA.14 –Renew Application Request

2. Select the Effective Year.

3. Select whether the license will be mailed to your home address or the school organization by clicking on either the 'School' or 'Home' buttons.

4. If 'School' is selected, an Organization Search will appear for you to find the correct organization to send the license to. To find the appropriate organization, click the Search icon [🔎] to open the Search Organization dialog box.
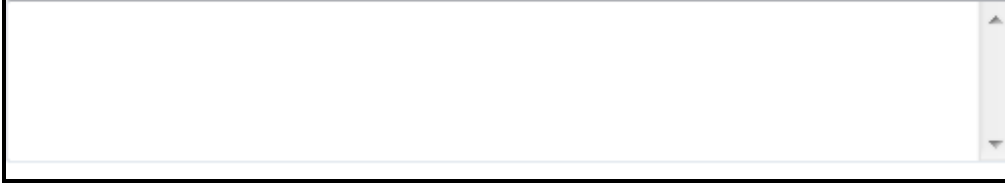
Figure OA.15 – Search Organization

    a.   Enter an IRN and/or Organization Name. (The Name field will automatically perform a wildcard search, so a search for 'Ohio State' will return all organizations which begin with the words 'Ohio State'. A search for '*Ohio' will return all organizations which have letters or words before the word 'Ohio'.)

    b.   Click Find Organization.

    c.   Click on the correct Organization to select.

    d.   The Find Organization dialog box will close and the organization name will populate in the Organization field. The address will also appear for your confirmation.

5. If 'Home' is selected, your home mailing address from the OEDS system will be displayed. If this is not correct you may click on 'Edit Address' to change the mailing address.

6. Click on the 'Next' button.

7. The Background Checks and Signatures page will be displayed. Answer all of the background check and legal questions with either a Yes or No. If any legal question is answered as 'Yes', then the explanation box will be opened and you must enter an explanation for your answer.

> If you answer YES to any question, you must provide an explanation. Please include the year of conviction, the nature of the offense and the court where the matter was heard:

8. Check the 'Applicant Signature' box to certify that all of the questions are answered truthfully and to verify your signature.

9. If a Superintendent, LPDC, or Dean signature is required for this application, the 'Signature' box will be displayed. To find the appropriate organization, click the Search icon [🔎] to open the Search Organization dialog box.

   a. Enter an IRN and/or Organization Name. (The Name field will automatically perform a wildcard search, so a search for 'Ohio State' will return all organizations which begin with the words 'Ohio State'. A search for '*Ohio' will return all organizations which have letters or words before the word 'Ohio'.)

   b. Click Find Organization.

   c. Click on the correct Organization to select.

   d. The Find Organization dialog box will close and the organization name will populate in the Organization field.

10. After selecting the correct organization, select the correct signer. A box will open with the possible signers. Click on the correct name, then click on 'Select Signature Person'. The name of the signer will populate in the Signature Person Name box.

11. Click on 'Submit' to submit the application. To cancel out and not submit, click on 'Cancel'. Any errors in the application will appear in red at the top of the screen. These must be corrected for a successful submission.

12. If the application was submitted successfully, the 'My Account' screen will be displayed for payment. (See Section titled 'My Account' for detailed instructions on how to enter online payments.)

IPTI Registrations

The IPTI Registration module is accessed by persons that wish to register for the Intensive Pedagogical Training Institute electronically. A person can only have one registration for this coursework and the page show in Figure OA.13 is displayed when first accessed.

Figure OA.13 – IPTI Registration

To create the IPTI Registration:

13. Select the Credential that will be applied for after completion of the training from the drop-down list and click **Add New Registration**.

14. A page similar to Figure OA.14 will be displayed.

15. Select the desired Teaching Fields and check each of the check boxes to verify that all requirements have been met.

16. Check the method of Payment under Payment options.

17. If all requirements have not been completed, click **Save**, which will not submit the form to be reviewed and the registration can be edited later and then submitted. If all requirements are completed, click **Submit** to send the form to ODE for review.

18. If the Pay Online option was selected, the My Account page will be displayed so that payment can be made online. If another Payment Option was selected, the IPTI Registration home page will be re-displayed and show the Registration and status (Figure OA.15)

19. From this page, the Registration can be edited or deleted if the Status is still Pending Review. The Registration can also be printed from this page.

Figure OA.14 – IPTI Registration Details

Figure OA.15 – IPTI Registration Home

Enroll in Electronic Signature

This feature allows a valid application signer to enroll in the new Online Application Signature module. The goal is to eliminate, wherever possible, paper applications and the need to obtain signatures manually on these paper applications. Now, if a signer is "Enrolled" as an e-Signer, he/she will receive an email when an educator has submitted an application online which requires a signature. The signer will then review their inbox, through CORE My Approvals, and either electronically "sign" (approve), or decline the applications.

You must have one of the following valid Signer roles in OEDS before enrolling:

Superintendent, Superintendent Designee, Dean-College of Education, Dean Designee-College of Education, Coordinator-LPDC, Coordinator Designee-LPDC, and Credential e-Signer.

LEA Type	Roles Allowed
Public School District, Non-Public School, Educational Service Center, Community School, Joint Vocational School District, Career Technical Planning District, Ohio School for the Deaf, Ohio School for the Blind, Dept. of Youth Services schools, Ohio Central School System County Boards of Developmental Disabilities	Superintendent Superintendent Designee Credential e-Signer
College / University (IHE)	Dean – College of Education Dean Designee–College of Education
Local Professional Development Committee	Coordinator-LPDC Coordinator Designee-LPDC

To enroll:

1. Sign on to your SAFE account

2. Select the ODE.CORE application

3. Hover your cursor over "My Educator Profile" on the main CORE menu. A popup menu will be displayed. Click on "My Approvals". Or….

4. Click on "My Educator Profile" on the CORE main menu. Then select "My Approvals" from the My Educator Profile dropdown menu.

5. The first time you view the "My Approvals" screen, you will be asked to enroll as an electronic signer. The following screen will be displayed:

Figure OA.16 – Enroll Me

Your current OEDS role and organization will be displayed on this screen. Review the instructions on this page and verify the requirements to be an electronic signer. Click on "Enroll Me".

Note: You must have a valid email address in the system to enroll as an e-Signer, as all messages are sent back and forth via email. If you receive the following message:

We could not find your Primary Email Address in OEDS, to send you email notifications, please click on "Add Primary Email Address" button to add email address.

Then click on the button "Add Primary Email Address".   You will be taken to the "My Information" screen to add an email address. Then you may return to "My Approvals" to enroll.

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6. Read the displayed text, and if you agree, click on "I Agree". If not, you may click "Cancel" to not enroll at this time.

Congratulations !   You are now set up as an e-Signer for online new and renewal applications! You should receive an email verifying your enrollment.   You will now begin receiving email notices when applicants use your organization as an Electronic Signer. Please monitor your "My Approvals" inbox regularly to ensure you are signing applications on a timely basis. Refer to this manual under the "My Approvals" section for details on signing applications.

THANK YOU for enrolling !

My Approvals

The My Approvals module is accessed by persons that have been assigned the appropriate roles for signing electronic applications in OEDS. This group includes the following roles:

Superintendent, Superintendent Designee, Dean-College of Education, Dean Designee-College of Education, Coordinator-LPDC, Coordinator Designee-LPDC, and Credential e-Signer.

> **If a member of an ESC is to be responsible for signing applications online, they can be given the role of 'Credential e-Signer' for that district in order to do so.**

To access My Approvals, select the My Educator Profile icon from the main CORE menu, then select "My Approvals" from the My Educator Profile drop-down menu. A list similar to will be displayed.

Figure OA.17 – My Approvals Home

This page displays the list of applications that have been submitted for your review. To review and Approve or Decline an application, click anywhere in the row of that application. A page similar to will be displayed.

Figure OA.18 – Review Online Application

The application can be reviewed and then either Approved or Declined. In the case of a Decline, an e-mail is sent to the applicant. Comments are required if an application is declined. The applicant will not see these comments, but these will be viewable by the Office of Educatorl Licensure.

The signer can also change where the license will be mailed to at this point, by clicking on either 'School' or 'Home'. If 'Home' is selected, the home address of the teacher will be displayed. If 'School' is selected, the mailing address of the school/organization will be displayed.

To approve or decline an application, click on the dropdown 'Action'. Click on either 'Approve' or 'Decline'. If 'Decline' is chosen, comments must be entered in the 'Notes' section.

Click on 'Save'.

Note: Multiple signers for one organization may all receive applications to be approved in their inbox titled 'My Approvals'. Once one person approves or declines an application, it will be removed from all signers' inboxes.

Two-Step Approval Process

The Two-Step Approval Process was designed for those organizations which want to implement a two-step process whereas one person acts as a "Reviewer" of applications initially, then forwards the application on to an "Approver" for final approval and electronic signature.

This new process will introduce two new levels of signers: Reviewers and Approvers. A <u>Reviewer</u> will be able to look at all pending online applications, verify them, and if eligible, mark them as "Reviewed" (or "Declined"), and pass them along to the Approver. The <u>Approver</u> will see only those online applications which are ready and are marked as "Reviewed". He/she will then be able to approve (sign) or decline them.

While any organization type which can sign online applications <u>may</u> utilize this process, they will not <u>need</u> to make any changes to their current approval process if they do not wish to. The system will work "as-is" with no changes necessary for the majority of signer organizations.

The following business rules apply for setting up the Two-Step Approval Process:

1. Any signer organization type may choose to utilize the 2-Step Approval Process.
2. In order to utilize the 2-Step Approval Process, an organization must have at least two eSigners.
3. All potential signers must first be "Enrolled" as eSigners before they will appear in "Manage eSigners".
4. If the 2-Step Approval Process is not used, then all eSigners for an organization will have the default settings of "Yes – Receive Email Notifications", and every signer will see all Pending application requests. They will be able to only "Approve" or "Decline" these requests.
5. Before giving an eSigner the "Approver" level, someone must first be designated as a "Reviewer".
6. An organization cannot have all "Reviewers" and no "Approvers".
7. An organization cannot have all "Approvers" and no "Reviewers".
8. An organization may have a "Reviewer" and a "No Preferences" or "Approver".
9. An organization cannot have all eSigners with Email Notification set to "No".
10. A "Reviewer" will see only "Pending" application requests. An application will not be submitted to OEL for review after the Reviewer has processed it, only after the Approver has processed it.
11. A "Reviewer" may approve of the request and mark it as "Reviewed", or may "Decline" the request and not send it on.
12. An "Approver" will see only "Reviewed" application requests.

Setting up the Two-Step Approval Process:

1. To set up an organization's to utilize the 2-Step Approval Process, click on "Manage eSigners" from the "My Educator Profile" dropdown menu. (Note: Any valid eSigner role in an organization may manage the eSigners.)
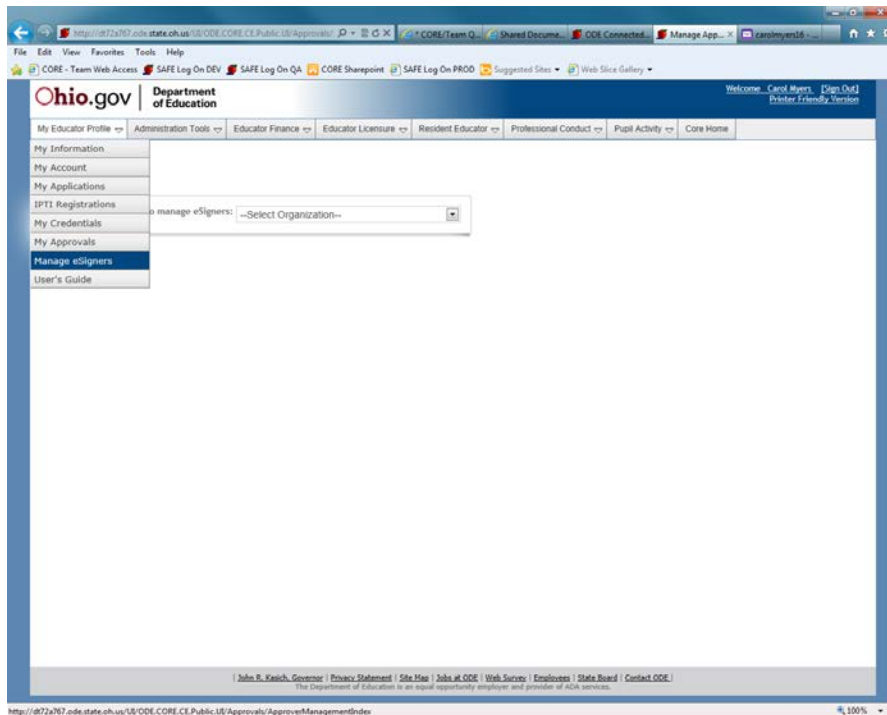

Figure OA.19 – My Educator Profile Submenu

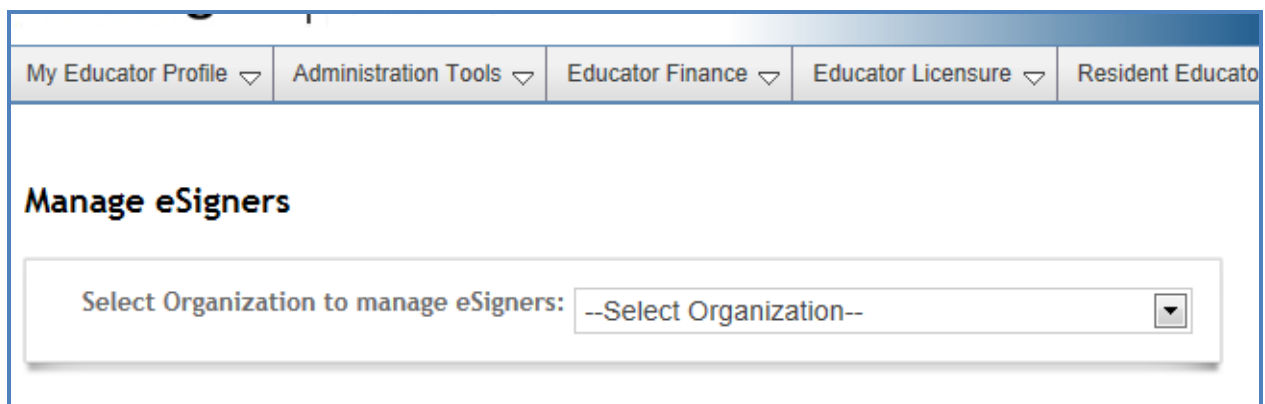2. Select the Organization from the dropdown:

Figure OA.20 – Manage eSigners

3. The eSigners for that organization will be listed. If there is only one eSigner enrolled, the 2-Step Approval Process cannot be set up.

Figure OA.21 – Manage eSigners

Click on the eSigner to be modified. (Note error when there is only one eSigner enrolled).

Figure OA.22 – Manage eSigners

4. Everyone must be enrolled as an eSigner before setting up the 2-Step Approval Process. To do this, each eSigner must go to "My Approvals", and click on "Enroll Me".
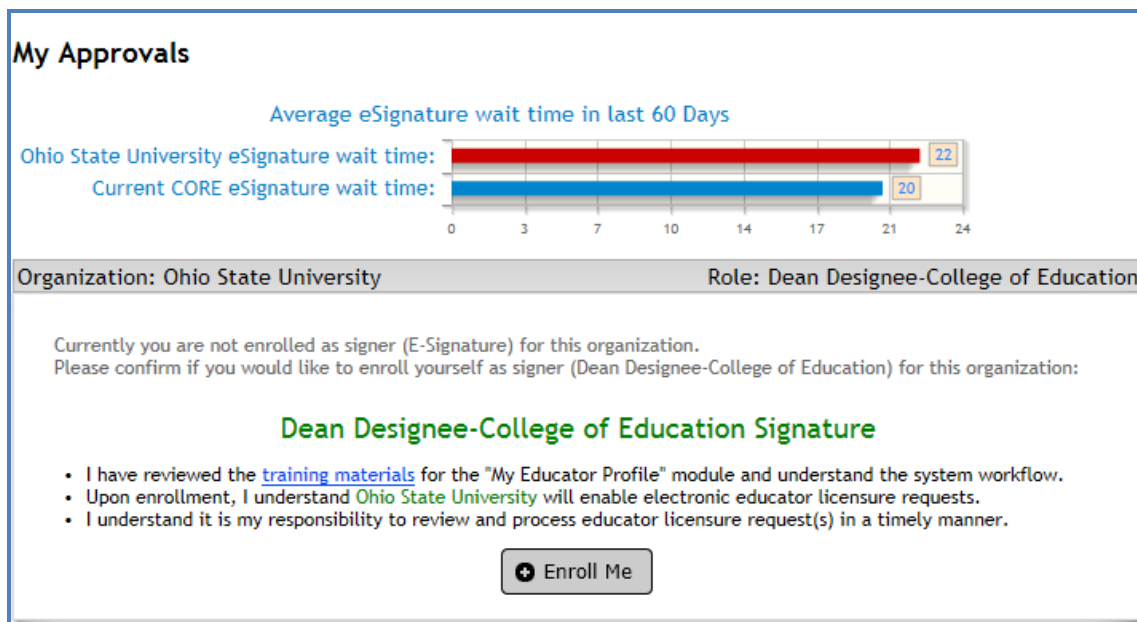
Figure OA.23 – Enroll Me Now

5. Return to "Manage eSigners" to set up preferences for the eSigners. Click on a signer's name. (Note: the level of "No Preferences" is the default before any profiles are created.
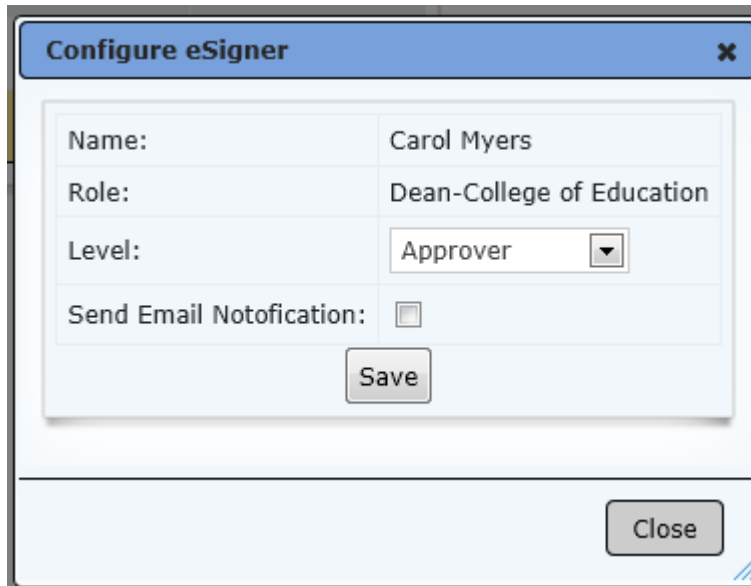
Figure OA.24 –Manage eSigners

6. A Configure eSigner box will appear which allows a Signer Level to be selected, and the Email Notification preference to be set.

Figure OA.25 –Configure eSigner
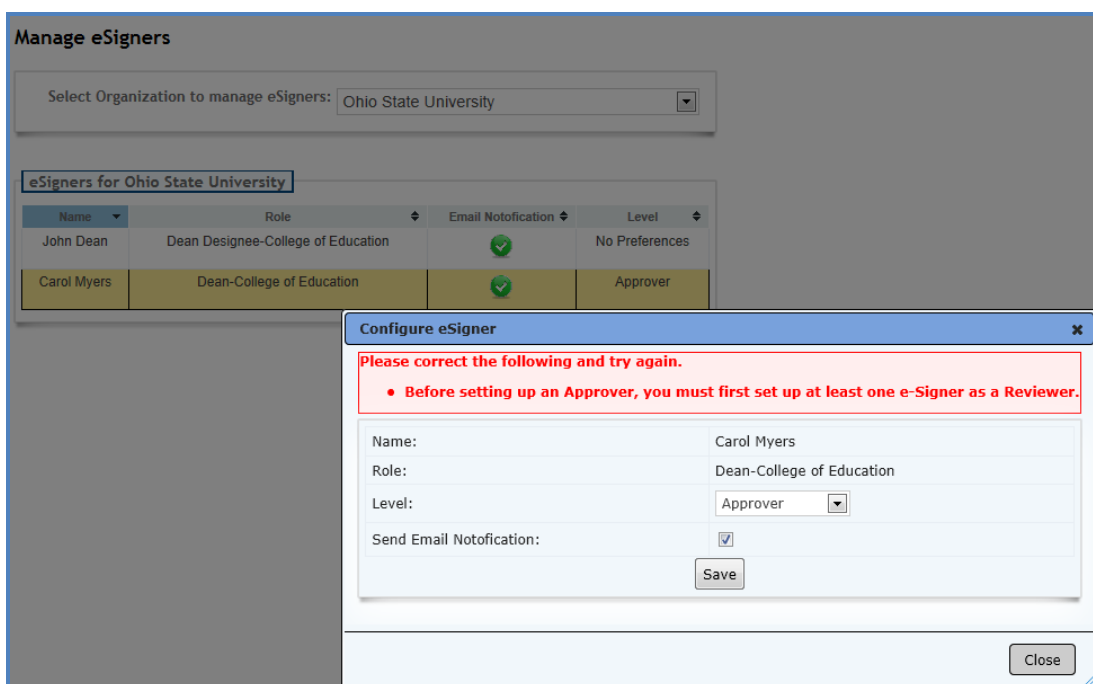
Reviewer: Can see only "Pending" applications. Can mark these applications as either "Reviewed", or "Declined". Does not have the final approval before going to Licensure.

Approver: Can see only "Reviewed" applications. Can mark these applications as either "Approved", or "Declined". Has the final approval before going to Licensure.

Both Levels: Can turn on or off Email Notifications.

7. An error message will appear if an Approver is selected without a Reviewer being set up first.
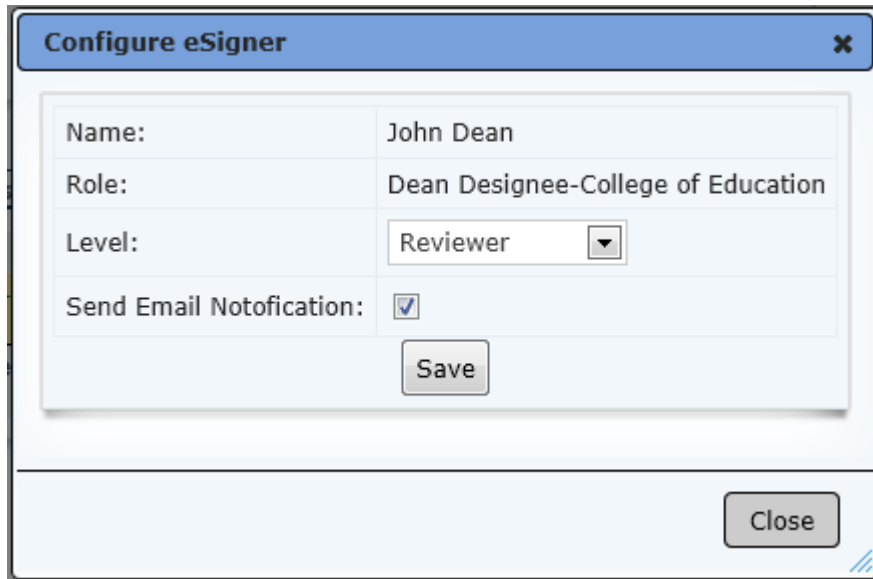
Figure OA.26 –Configure eSigner

8. First set up a Reviewer and a success message will be displayed.

Figure OA.27 –Configure eSigner
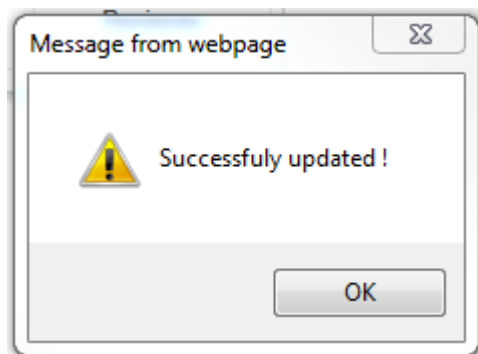
9. Next the Approver can be set up.
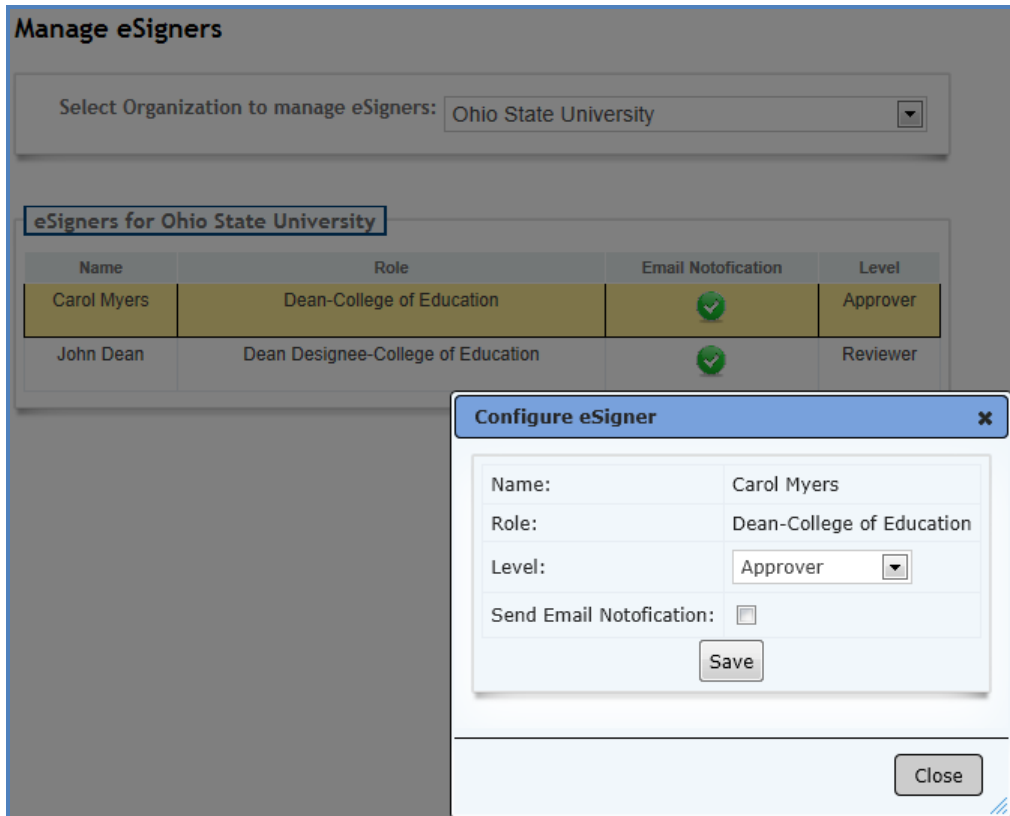
Figure OA.28 –Configure eSigner

10. The screen should now look like below, with one Approver and one Reviewer.

Figure OA.29 –Manage eSigners

11. The system will not allow an organization to set up all Reviewers, or all Approvers.

Figure OA.30 –Manage eSigners – error message

12. The system will not allow an organization to set up all eSigners with an Email Notification preference of 'No'. This is to avoid an organization not receiving ANY emails when online applications are submitted.

Figure OA.31 –Manage eSigners – error message