

Nominator User Manual - Appendix A

Setting up SAFE Accounts and Accessing the Ohio Educational Directory System (OEDS)

To access and use the Web-based application system on the Ohio Department of Education (ODE) Web site, the user must: 1) have an account set up on the Security Application for Enterprise (SAFE) Web portal, and 2) be assigned the appropriate role in the Ohio Educational Directory System (OEDS).

SAFE is a secure Web-based system that allows ODE customers to access various accounts and applications on the ODE Web site in a convenient way. Each SAFE account is unique and is not shared among individuals, school districts or organization staff. Every "secure" action by a SAFE account owner in a secure ODE Web application is logged and stored for security auditing.

The Ohio Educational Directory System (OEDS) is an online data system that allows organizations that do business with ODE (such as public districts, public schools, JVSs, community schools, ESCs, nonpublic schools, etc.) to maintain their own data profile. The general public can search OEDS for the most current information about an organization, such as mailing address, phone number and e-mail.

In order for OEDS to be most useful, it is important that all organizations keep their OEDS profiles as current and up-to-date as possible. This means that anytime there is a change in staff, title, address, location, e-mail, etc., the designated person(s) for the organization, known as the OEDS-R Administrator, must update the information in OEDS.

Obtaining a SAFE Account

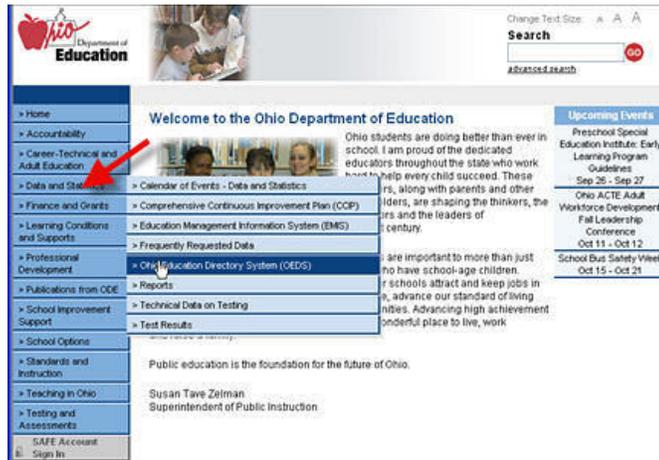
To access any secure data systems or online applications on the ODE Web site, a SAFE account must be set up. To obtain a SAFE account, do the following:

1. The user must have his/her state issued driver's license or state identification card on hand. Information from a valid state driver's license or state ID card will be needed to create a SAFE account. [Note: For those without an Ohio driver's license or ID card, there is a manual process for obtaining a SAFE account; follow the prompts for **Option 2** at https://webapp2.ode.state.oh.us/portal/signup/DL_Entry.asp.]
2. Click the **SAFE Sign In** button located at the top of the ODE home page and follow the prompts, or click on this link: <https://webapp2.ode.state.oh.us/portal/signup/>.
3. Carefully read the agreement.
4. After reading the agreement, scroll down to the bottom of the page and click the *I Agree* button.
5. Enter the required information in the appropriate boxes and follow the directions posted on the screen. Step-by-step directions are available at <https://webapp2.ode.state.oh.us/portal/help/>.
6. Once all required information has been successfully entered, the user will receive a user name and password via e-mail with which to log onto his/her SAFE account.

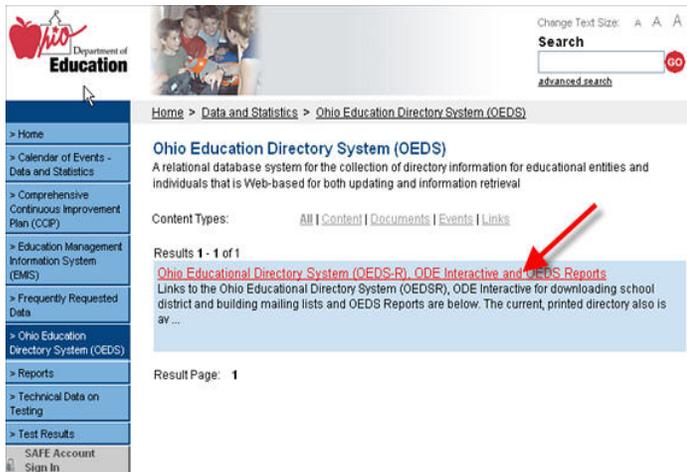
Finding the OEDS-R Organization Administrator

Once users have their own individual SAFE accounts set up, they must have the appropriate role (or roles) assigned to them in OEDS by their OEDS-R Organization Administrator in order to gain access to the online application system. This is the person who has been authorized to make any changes or updates to an organization's OEDS profile. To find out who is the OEDS-R Organization Administrator of a particular school, district, or organization, do the following:

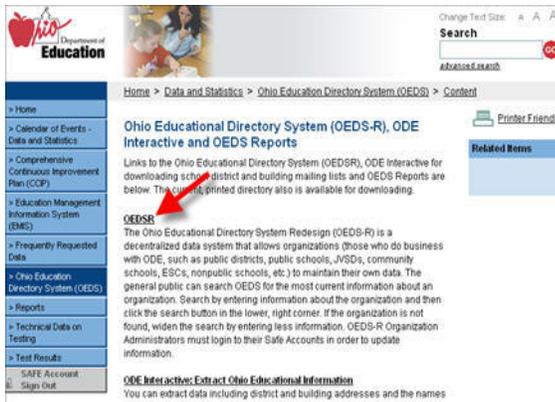
1. On the ODE Home Page (<http://www.ode.state.oh.us>), click the *Data and Statistics* link **> Data and Statistics** on the left menu.
2. Scroll down to the *Ohio Educational Directory System (OEDS)* link



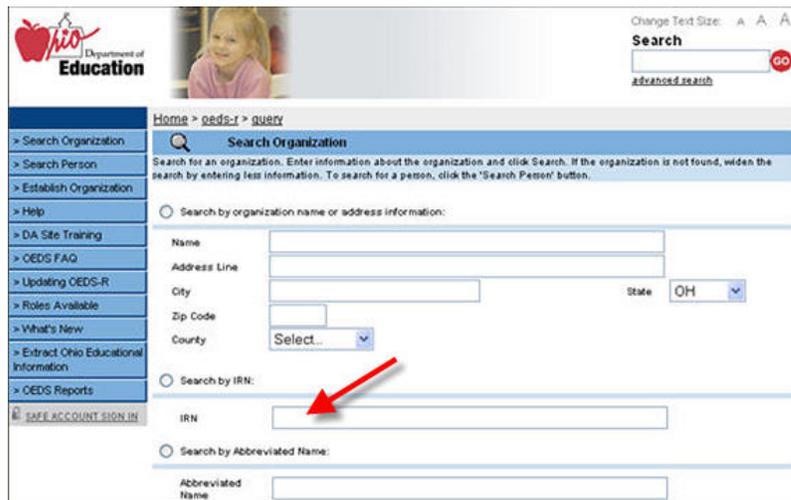
3. Click on the red "Ohio Educational Directory System (OEDS-R), ODE Interactive and OEDS Reports" link in the middle of the screen (see arrow below).



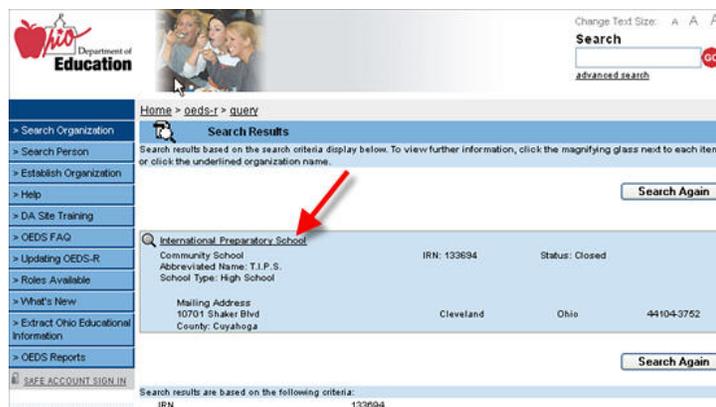
4. Click the *OEDSR* link (see arrow below).



- The Search Organization screen should now be showing. Search for the district or school by name or scroll down and search by IRN. If searching by name, do not put in too much information as it limits the search. The most expedient way to access a specific school is to enter the school's IRN. Enter the IRN and hit Enter or click the *Search* button.



- The school's record should now be showing.



- To determine who the OEDS-R Organization Administrator(s) is, click the Personnel tab at the top of the record.

General	Personnel	Location	Relationships
Identify			
Name (IRN)	International Preparatory School (133694)		
Abbreviated Name	T.I.P.S.		
Organization Type	Community School		
ODE Designated County	Cuyahoga		
Web URL			
Organization Status	Closed	Status Date	12/06/2005
Last updated on	12/06/2005		
Organization Relationship Information			
Hierarchy Organization	International Preparatory School (133694)		
Data Acquisition Site	Tri-Rivers Educational Computer Association (085647)		
School Finance Area	School Finance Area Coordinator (no IRN)		
CNS Reporting Organization	International Preparatory School (133694)		
State Senate District	State Senate District 21 (no IRN)		
State House District	State House District 11 (no IRN)		
US House District	US Congressional District 11 (no IRN)		
State School Board District	State Board District 11 (no IRN)		
Sponsoring Organization	Lukas (048199)		
Pre-Service Instructor Area	Pre-Service Instructor Area - N (no IRN)		
Community School Information			
NCES School ID	none	Contract Date	none
Estimated Student Enrollment	1000	Estimated Teacher Count	100
Grade Levels Served	K-1-12, PS		
School Type	High School		
School Classifications			

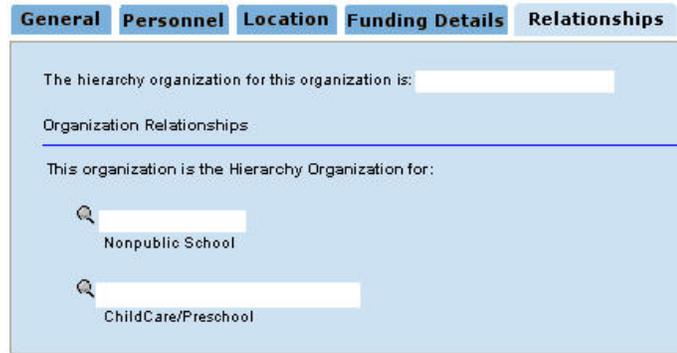
- The list of personnel is listed alphabetically by role. Scroll down until the bolded OEDS-R Organization Administrator listing is seen. The person whose name is listed with this role is the OEDS-R Organization Administrator for the school.

	Name	Administrators Name
	Date of Birth	12/29/1951
	Last 4 Digits of SSN	2097
	Role	OEDS-R Organization Administrator
	Status	Active
	Role Start Date	05/25/2005
	Role End Date	12/31/2500
	SAFE Account Flag	Y
	Person Title	
	Last updated on	08/13/2004

- Contact the OEDS-R Administrator by clicking on the picture of the magnifying glass next to their name, this will give you their phone number and e-mail address.

Schools that are part of a hierarchy

If the user's school is associated with a Diocese (or other hierarchy), then the OEDS-R Organization Administrator can be found by doing the following:



1. Click the Relationships tab at the top of the school's record.
2. Click the link for the hierarchy organization listed.
3. Click the Personnel tab.
4. Scroll down to the OEDS-R Administrator.
5. Contact the OEDS-R Administrator using the information provided.

Schools not affiliated with a hierarchy.

If the user's school **is not** associated with a hierarchy and the school's OEDS entry does not list an OEDS-R Organization Administrator, then the principal or superintendent needs to designate a staff member to this role by sending an e-mail to OEDSR.Support@ode.state.oh.us requesting that the designated person be assigned the role of OEDS-R Organization Administrator. Once you receive a confirmation e-mail, the change should appear in your school profile on the Personnel tab.

Assigning OEDS Roles to SAFE Accounts

After the user has determined who the OEDS-R Administrator is for his/her school and contacted that person, the OEDS-R Administrator can then assign the appropriate role(s) to the user so they may access the online Scholarship application system.

The following table shows the various Scholarship roles that can be assigned to a user by the OEDS-R Organization Administrator and the functions available with each role.

Role in OEDS	Who Is Assigned This Role?	Access to Cleveland online system?	Function	Can More Than One Person Have This Role?
Nominator –Cleveland	Nonpublic school personnel chosen to work on applicant data and enter ongoing program data for scholarship recipients	Yes	Can enter and edit student data.	Yes
Reviewer – Cleveland	Public school district personnel chosen to review applicant data	Yes	Can review student data, check boxes in cases of data discrepancies, write notes, and enter SSIDs. Cannot edit.	Yes
Superintendent	Superintendents of participating nonpublic schools and of public school districts with eligible schools	Yes	Has view-only access to student data. Cannot edit.	No
Treasurer	Treasurers of participating nonpublic schools and of public school districts with eligible schools	Yes	Has view-only access to student data. Cannot edit.	No
Principal	Principals of participating nonpublic schools	No	Receives communication via e-mail from program staff.	No

To assign a role, users should do the following:

1. Click the ***SAFE Sign In*** button located at the top of the ODE home page.
2. Enter account name and password information in the appropriate boxes and hit Enter or click the *Sign In* button.

Welcome to the Ohio Department of Education
Secure Application For Enterprise portal
 (Date: 11/13/2006 11:17:25 AM)

Account Name:	<input type="text"/>
Password:	<input type="password"/>

Not an account holder? [Sign up](#)
 Forgot your account information? [Request a reminder](#)



- On the Account Maintenance page, click the OEDSR link.

Account Maintenance

Please click [here](#) if you would like to change your password.

Application	Description
EdChoice	Educational Choice Scholarship Application
ODE CORE Educator Profile	CORE Educator Profile
OEDSR 	OEDS-R Application
SAFE District Reports	SAFE District Reports
SFPS	School Foundation Payment System
WGRS	Web Services Request System

- The “Search Organization” screen should now be showing.

Search Organization

Search for an organization. Enter information about the organization and click Search. If the organization is not found, widen search by entering less information. To search for a person, click the 'Search Person' button.

Search by organization name or address information:

Name 

Address Line

City State

Zip Code

County

Search by IRN:

IRN 

- Search for the district or school by name or scroll down and search by IRN. If searching by name, do not put in too much information as it limits the search. The most expedient way to access a specific school is to enter the school’s IRN. Enter the IRN and hit Enter OR click the *Search* button. The results of the search are displayed.



6. Click on the small picture of the magnifying glass  next to the correct school or district.
7. Click on the Personnel tab located at the top of the record. A list of all OEDS-related personnel and their associated role should now be seen. The list is alphabetized by role.



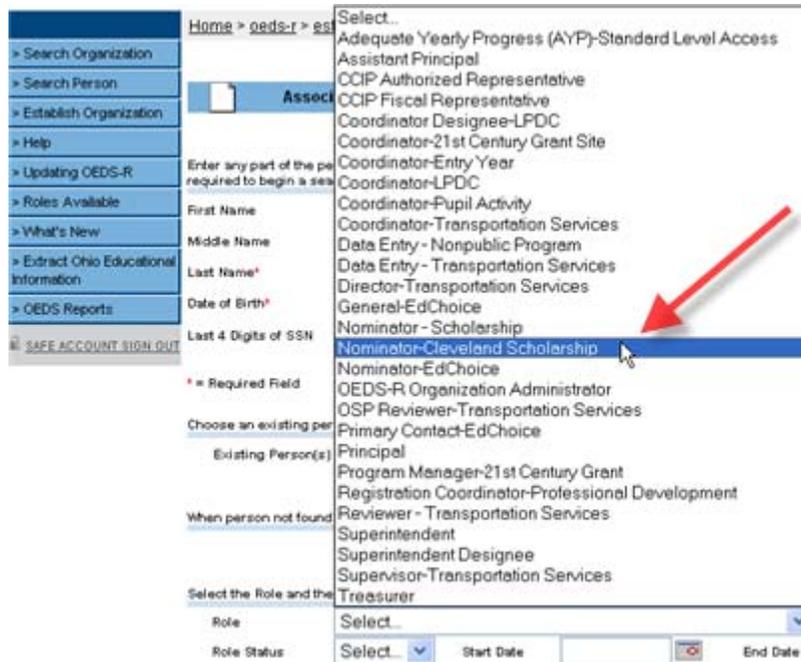
8. If the person(s) to be assigned a role is not listed, the OEDS-R Administrator will have to add them. To do so, click the *Add New Role* button.



[Note: Make sure that the person who will be assigned an role has already set up a SAFE account and received their confirmation e-mail containing their username and password.]

9. Enter all or part of the first and last name of the person and click the *Search* button.
10. Select the appropriate person from the list.
11. Select the role from the *Role* drop-down list.

For example, nonpublic schools will choose “**Nominator-Cleveland.**”



12. Select the *Role Status of Active* and enter the current date as the Start Date, and the latest date available as the Ending date.

Select...
 Vacant
 Interim
 Active
 Inactive



13. Enter a Person Title (e.g., principal, administrative assistant, etc.) if desired; this is optional.
14. Click the *Add Role* button. The person with the appropriate role will appear at the bottom of the page within the existing list of personnel in OEDS, usually in **GREEN** text.

Note: A chartered nonpublic school or district that has a *new principal or superintendent* that has never been a *superintendent or principal* will need to contact ODE's Office for Educational Reform. This office oversees the nonpublic school chartering process and works with new nonpublic school principals and superintendents for verification of certification/licensure. Call 614-644-2636 to request that the new administrator be added to the school record in OEDS. Once confirmation is received from the Office for Educational Reform, the OEDS-R Organization Administrator can associate the new principal/superintendent with the school by clicking on the magnifying glass  and then on the pencil  to associate a new person to that role. This pencil will only be visible to the OEDS-R Organization Administrator.

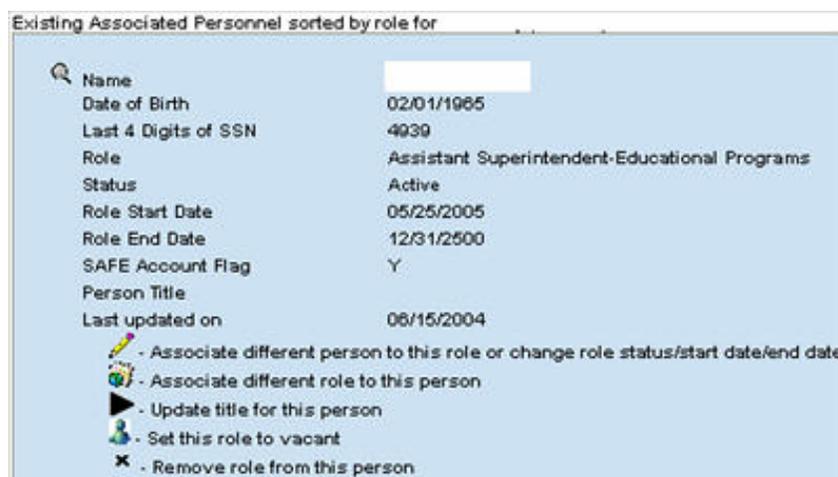
Updating Information in OEDS

It is important that the OEDS-R Administrator maintains up-to-date information for his/her school's OEDS record. Staff changes, new phone numbers, new e-mail addresses, and all other applicable information in an OEDS record should be updated immediately after a change occurs.

Updating district and school personnel in OEDS

To update OEDS information, OEDS-R Administrators must do the following:

1. Follow steps 1-5 of the "Assigning OEDS Roles to SAFE Accounts" section above to access the correct school or district.
2. To add or change personnel, click on the Personnel tab. Next, click on the pencil  next to the words "Click pencil to update personnel."
3. If the person listed in an existing role needs to be changed, scroll down to that position and click on the pencil next to the words "Associate different person to this role or change role status/start date/end date." If it is a new position, click the *Add New Role* button at the top of the page.



4. Search for the name of the employee. **The person's last name and date of birth are required to perform the search.** The system requires this search to determine if the person is already in the system. This prevents the same person from being entered in the system multiple times. Do not input too much information as it limits the search. For example: Mike Smith could exist in the system as Michael Smith, and searching for 'Mike Smith' would not display the proper results. After entering the name, click the *Search* button.

Enter any part of the person's name and click 'Search' to search for the person's full name. Last Name and Date of Birth are required to begin a search.

First Name

Middle Name

Last Name*

Date of Birth*  

Last 4 Digits of SSN

* = Required Field

Choose an existing person

Existing Person(s)  

5. If the person is already in the system, the name will be in the Existing Person drop-down box. Click the word *Select* next to the words “Existing Person.” If the person does not currently exist in the system, a message will display stating so.
6. If the correct name is listed, select the name and continue.
7. If the correct name is not listed, click the *Establish New Person* button.

When person not found during Name Search, click here to enter the person information



- This will bring up the Establish Person screen. Enter the correct name, last four digits of the social security number and birth date. Click on the *Add Person* button.
8. This will take the user back to the search screen. If the name was entered manually, it will now be in the *Established Person* drop-down box. Click the word *Select* and highlight the name.
 9. Select the appropriate title from the *Role* drop-down list. The positions listed are the only roles available. The user must choose from this list.
 10. Select the Role Status.
 11. Finally, click the *Update or Add Role* button. The correct name will now appear in the list of associated personnel.

[Note: Certain positions require an e-mail address. For these select positions, the user will not be able to add personnel until the e-mail address has been entered.]

Deleting Roles in OEDS

1. To delete a role or person no longer associated to the organization, click on the Personnel tab. Click on the pencil next to the words “Click pencil to update personnel.”
2. Scroll down to where the person/role that is no longer with the district is listed.
 - a. To keep the role listed and remove the name in that role, click on the icon next to the words “Set this role to vacant.”
 - b. To completely remove the role and the person from the personnel listing, click on the icon next to the words “Remove role from this person.”



Repeat Steps 1 and 2 for each position as necessary.

Updating an Address in OEDS

1. Follow steps 1-5 to of the “Assigning OEDS Roles to SAFE Accounts” section to access the correct school or district.
2. Click the Location tab. Click on the picture of the pencil next to the location name.
3. Click on the pencil next to the words “Update Address.” Notice both the physical and mailing addresses are listed. Correct both addresses. If using a PO Box, it is important to add a physical location as well.
4. Replace the old address with the new information. Click the *Standardize Address* button.



5. If the address meets USPS standards, a message will appear in **green**. Click on the Use Standardized Address button.
6. If the address does not meet USPS standards, a message will appear in **red**. However, if the address is correct as is, click on the Use non-standardized address button. The system will require the user to enter the county and a reason for the address certification failure. If the address is incorrect, re-enter the location and try again.
7. Click the *Update Address* button to complete the address change.

Changing Personal Contact Information in OEDS

1. To change a phone number or e-mail address, return to the Search Organization/Person page by clicking the link on the left side of the computer screen under the menu or clicking the following link: <http://webapp2.ode.state.oh.us/oeds-r/query/>.
2. The main search page will load. Scroll to the bottom and click the *Search Person* button in the bottom left corner.
3. Search for the person, by inputting any of the information available. The more information that is entered the more defined the results.
4. Click on the magnifying glass next to the correct name.



 Name	<u>STAFF MEMBER NAME HERE</u>
Role	OEDS-R Organization Administrator
Status	Active
Role Start Date	06/02/2006
Role End Date	12/31/2500
SAFE Account Flag	Y
Person Title	
Last updated on	06/02/2006

 Name	<u>ADMINISTRATORS NAME</u>
Role	Principal
Status	Active
Role Start Date	06/30/2005
Role End Date	07/31/2005
SAFE Account Flag	Y
Person Title	
Last updated on	07/01/2005

5. Update the information by clicking on the picture of the pencil in the appropriate section. The user should have at least one phone number and one e-mail address marked as primary.

The user can only change information for people associated with the district or school.

All questions regarding OEDS updates and changes should be directed to the user's DA site or e-mailed to: OEDSR.Support@ode.state.oh.us.