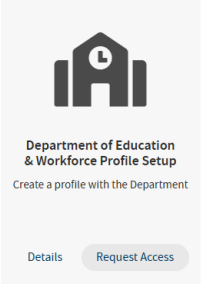
Application Role Management

PERSONAL ROLE MANAGEMENT

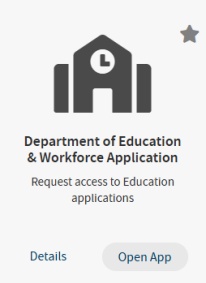
HOW DO I NAVIGATE TO THE ROLE REQUEST APPLICATION?

- Log in to OHID. If the user needs assistance setting up an OHID, please reference the following guide:
  How to Create a New OHID account and Department of Education Profile

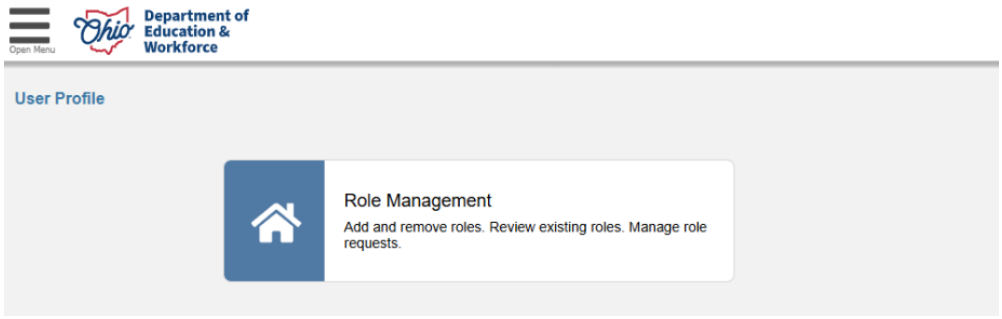
- If a user does not have a user profile with the Ohio Department of Education and Workforce, they need to start by creating one. This can be done by selecting the "Department of Education and Workforce Profile Setup" OHID tile.



- Once the user has an approved user profile with the Ohio Department of Education and Workforce, they will select the "Department of Education & Workforce Application" OHID tile.

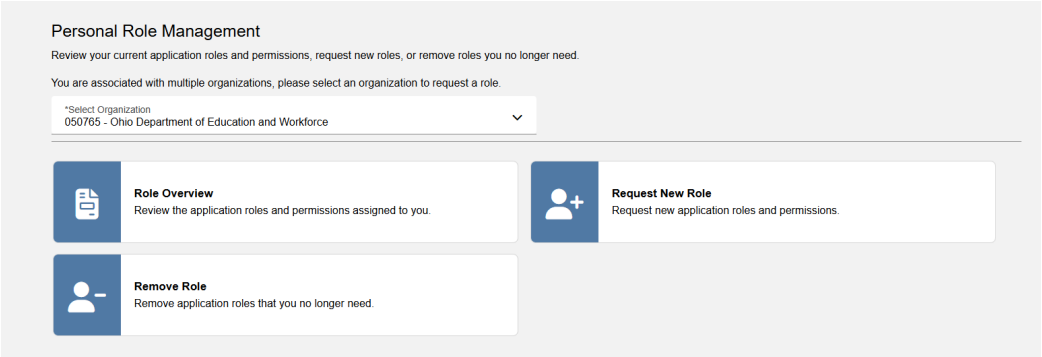


- This will redirect the user to their User Profile page.



Department of Education & Workforce

- Selecting Role Management will take the user to their Personal Role Management page.

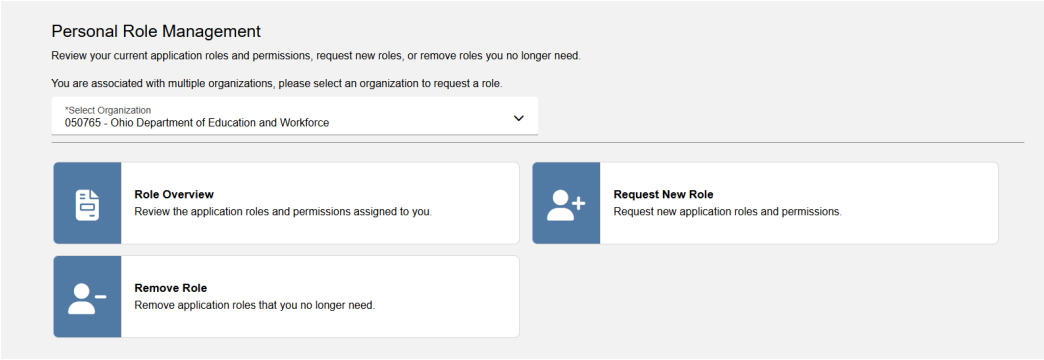


WHO CAN SEE THE PERSONAL ROLE MANAGEMENT SECTION AND HOW IS IT USED?

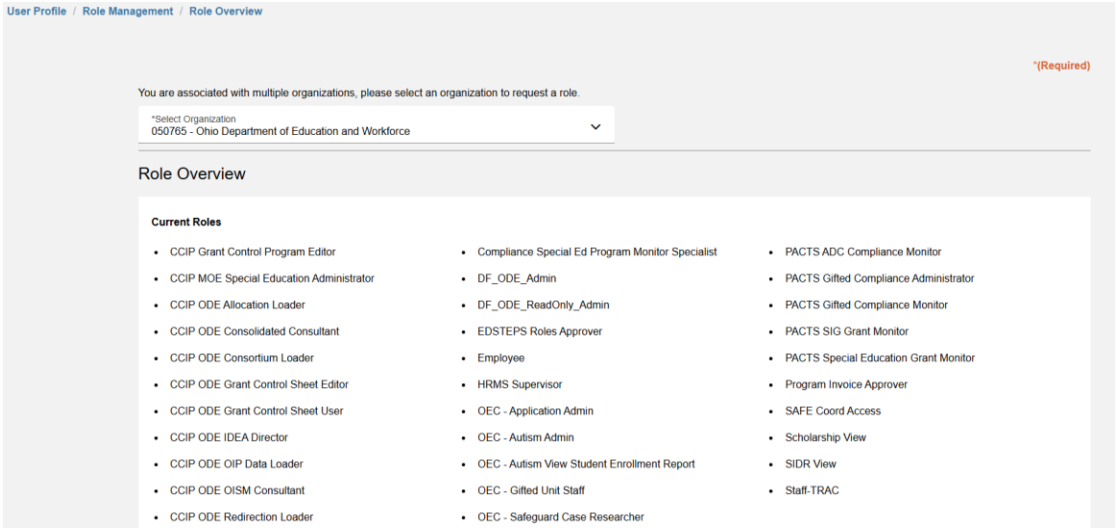
- All internal and external users can see the Personal Role Management section.
- Internal and external users can see their current roles for every organization for which they have access. They can see their pending role requests and role history.
- All users can request new roles and can remove their existing roles if they no longer need their roles.
- If the user is assigned to multiple organizations, the user will have the option to select/change the organization via the Select Organization dropdown.

HOW DO I SEE MY CURRENT ROLES?

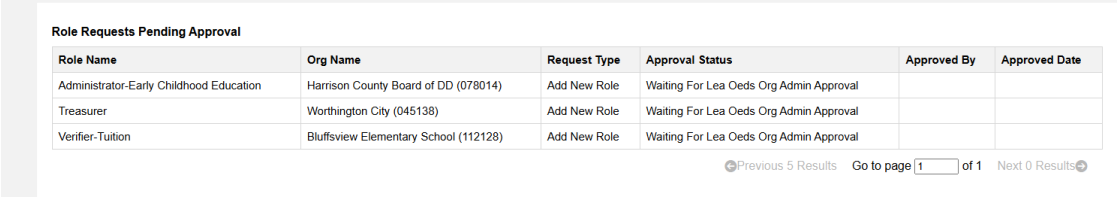
- Click on the Role Overview tile.



- Users can see their current roles in the Role Overview section.



- Users can see role requests that are waiting to be approved in the Role Requests Pending Approval section.

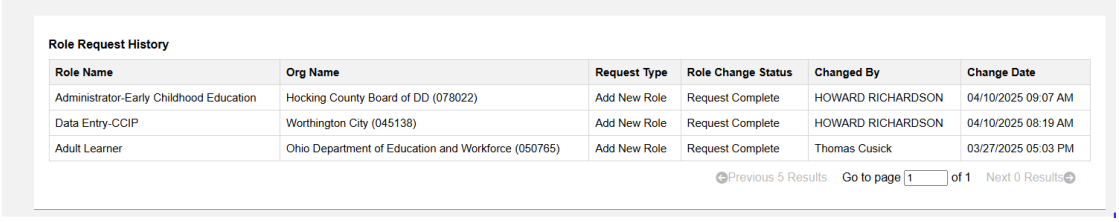


Role Requests Pending Approval

Role Name	Org Name	Request Type	Approval Status	Approved By	Approved Date
Administrator-Early Childhood Education	Harrison County Board of DD (078014)	Add New Role	Waiting For Lea Oeds Org Admin Approval		
Treasurer	Worthington City (045138)	Add New Role	Waiting For Lea Oeds Org Admin Approval		
Verifier-Tuition	Bluffsview Elementary School (112128)	Add New Role	Waiting For Lea Oeds Org Admin Approval		

Previous 5 Results Go to page 1 of 1 Next 0 Results

- Users can see role requests that were either approved or denied in the Role Request History section.



Role Request History

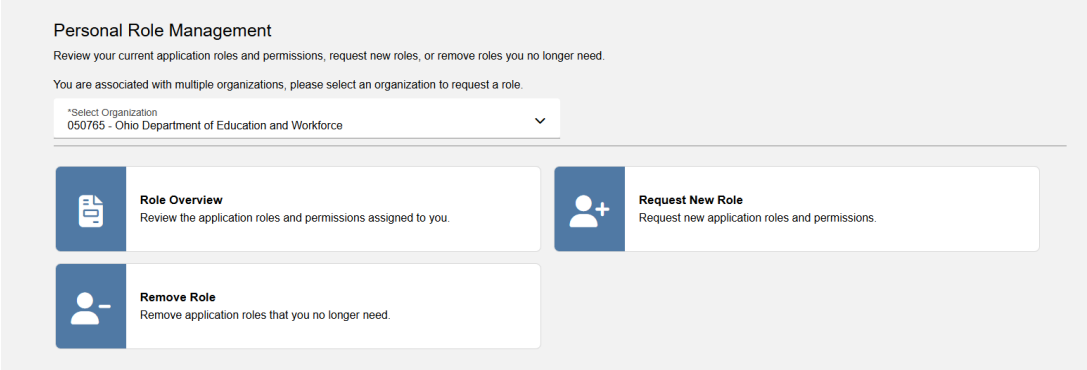
Role Name	Org Name	Request Type	Role Change Status	Changed By	Change Date
Administrator-Early Childhood Education	Hocking County Board of DD (078022)	Add New Role	Request Complete	HOWARD RICHARDSON	04/10/2025 09:07 AM
Data Entry-CCIP	Worthington City (045138)	Add New Role	Request Complete	HOWARD RICHARDSON	04/10/2025 08:19 AM
Adult Learner	Ohio Department of Education and Workforce (050765)	Add New Role	Request Complete	Thomas Cusick	03/27/2025 05:03 PM

Previous 5 Results Go to page 1 of 1 Next 0 Results

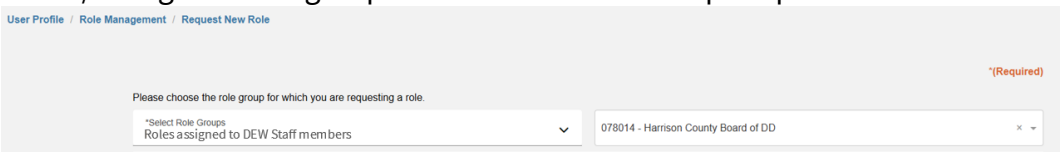
- Clicking the Back button on Role Overview screen will navigate user to the Role Management home page.

HOW DO I REQUEST A NEW ROLE?

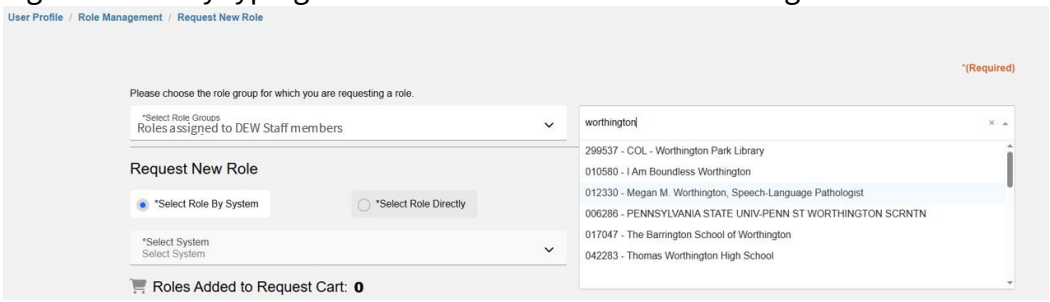
- Click on **Request New Role** tile.



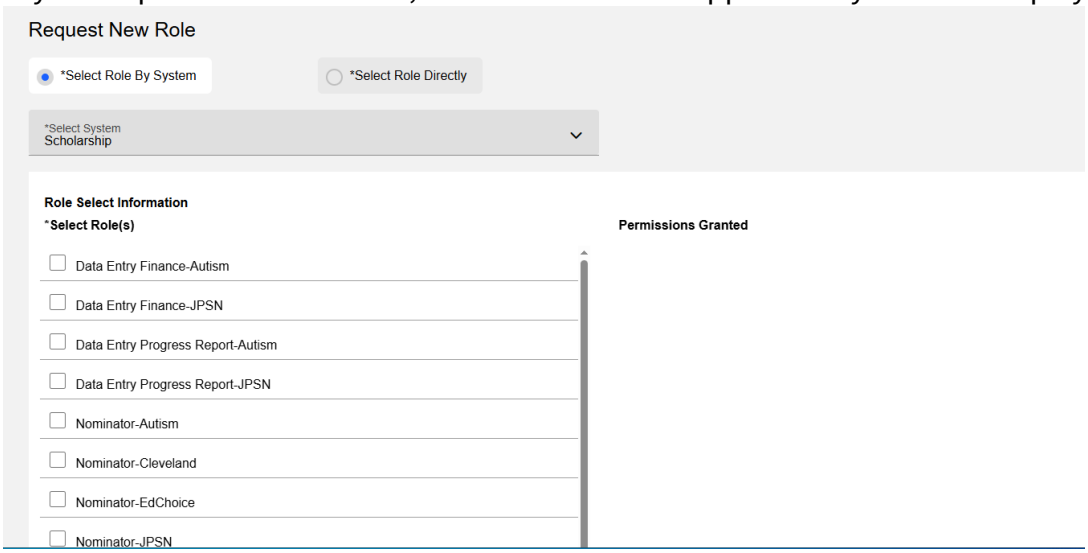
- If the user is assigned to multiple role groups, the user will have the option to select/change the role group via the Select Role Group dropdown.



- If the user is assigned to multiple organizations, the user can search for different organizations by typing either the IRN or the name of the organization.

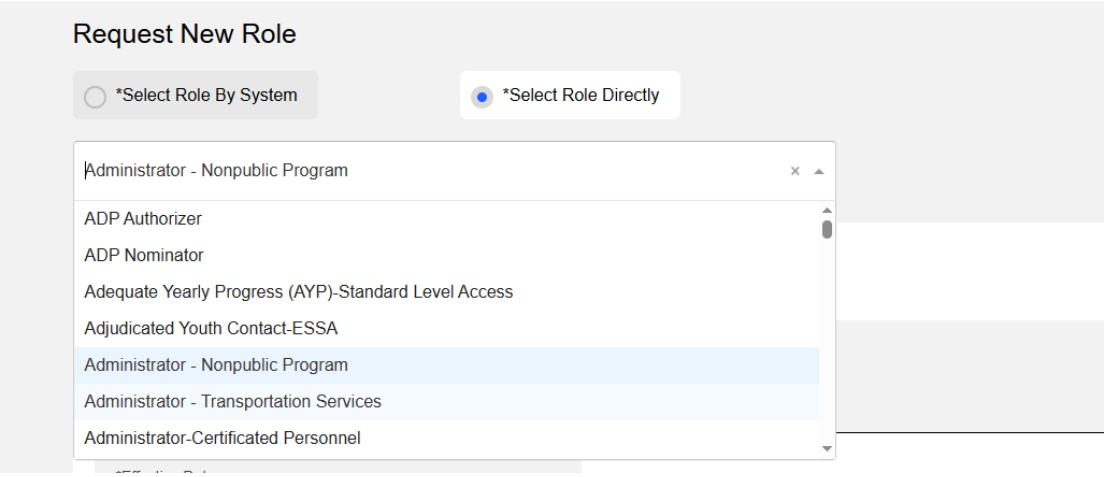


- Users can search for roles by selecting the system and role via the Select Role By System option. Once selected, a list of roles for the applicable system will display.



Department of Education & Workforce

- If the user knows the exact role name, the user can select the Select Role Directly option and type the role name. This option will filter role names as the user types.

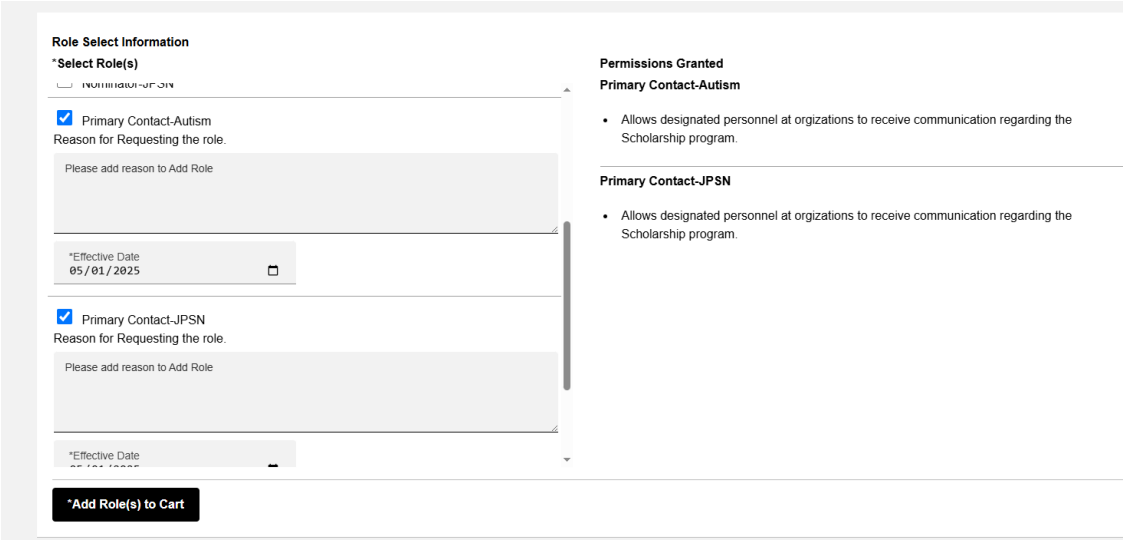


- Regardless of which option the user selects, once the user finds the role(s) they want to add, they will select the checkbox and enter a Reason for Requesting the role.

- Users will see a description for each role selected on the right-hand side of the screen in the Permissions Granted section.

- Users can also add an Effective Date. This field will default to the current date, but users can set it for a future date if needed.
    - **Note:** This date will be set as the current date when this functionality goes live. A future enhancement will be released to allow users the ability to set a future effective date.

- Once done, users will click *Add Role(s) to Cart to add the roles to their role cart.

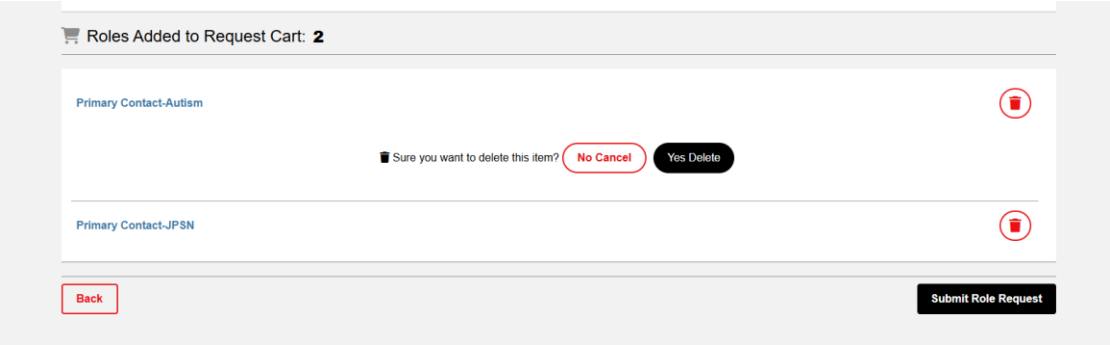


- Once the user adds roles to their role cart, they will see them in their cart at the bottom of the screen. Users can delete added roles from their cart by clicking on the

delete button (trash can in red). This will display confirmation to the user. If the user wants to delete, the user will select the Yes Delete button.

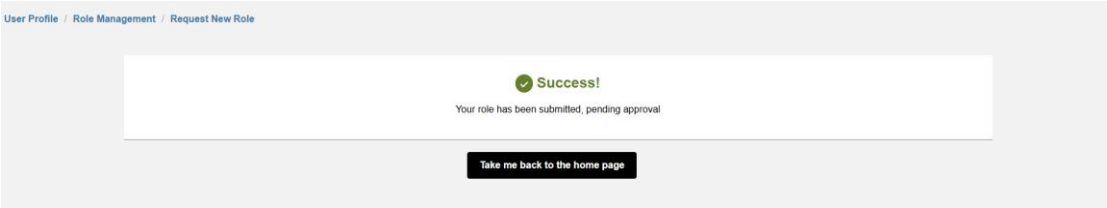
- If the user does not want to delete the role from their role cart, they will select the No Cancel button.

- Once the user has all roles added to their role cart, the user will submit the request by clicking the Submit Role Request button

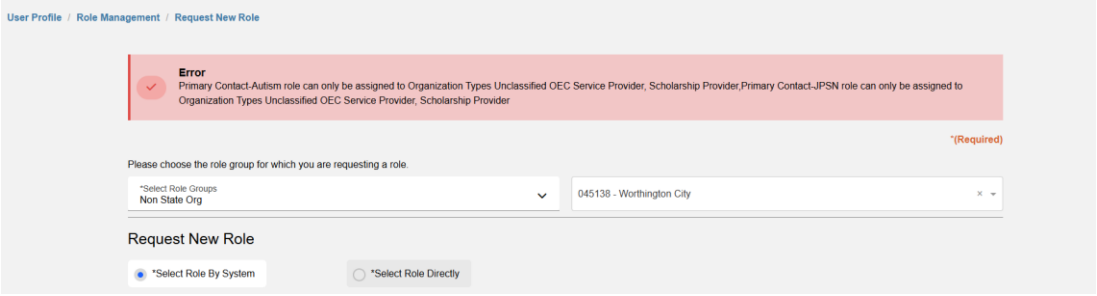


- The user will see a success message if the user's role request was successfully submitted.

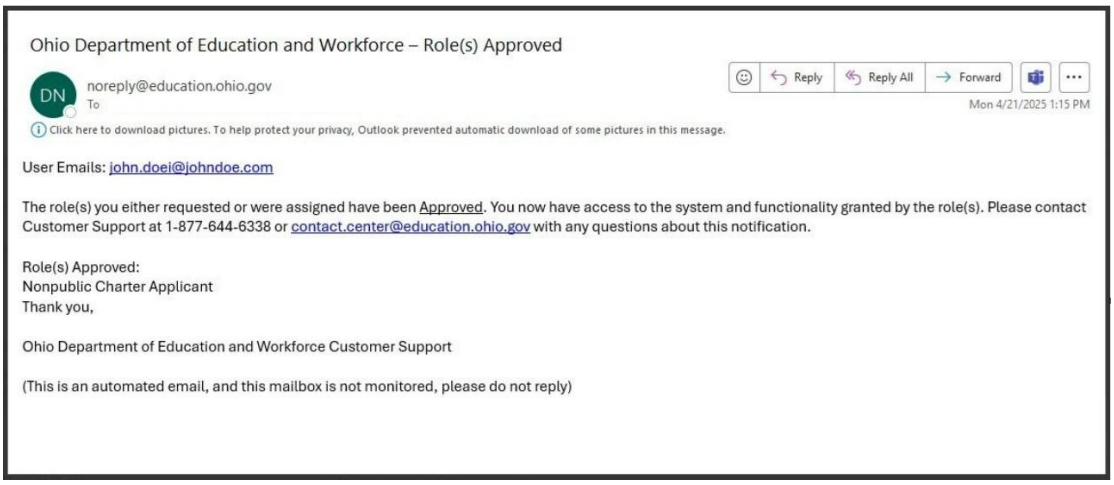
- The user can click the Take me back to the home page button to navigate back to the Role Management home page.



- If the user requests a role their organization is not permitted to have, they will receive an error message.

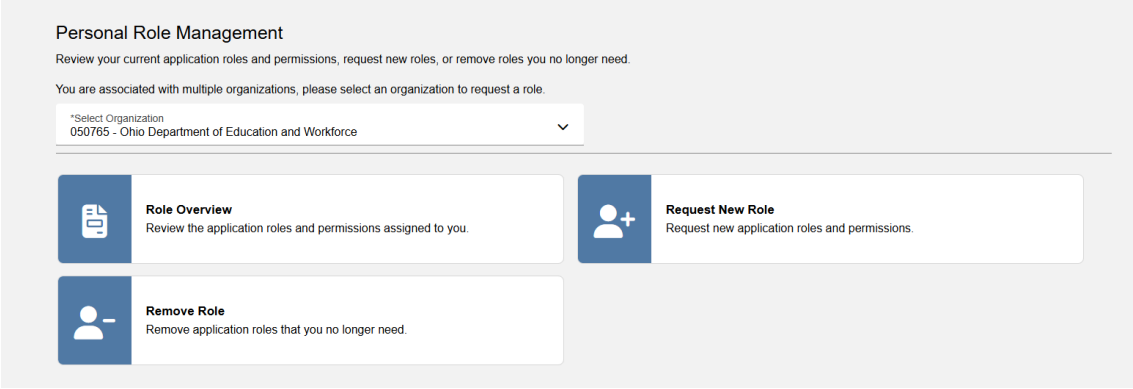


- Once approved, the user will also receive an automatically generated email, informing the user that their request is pending review.

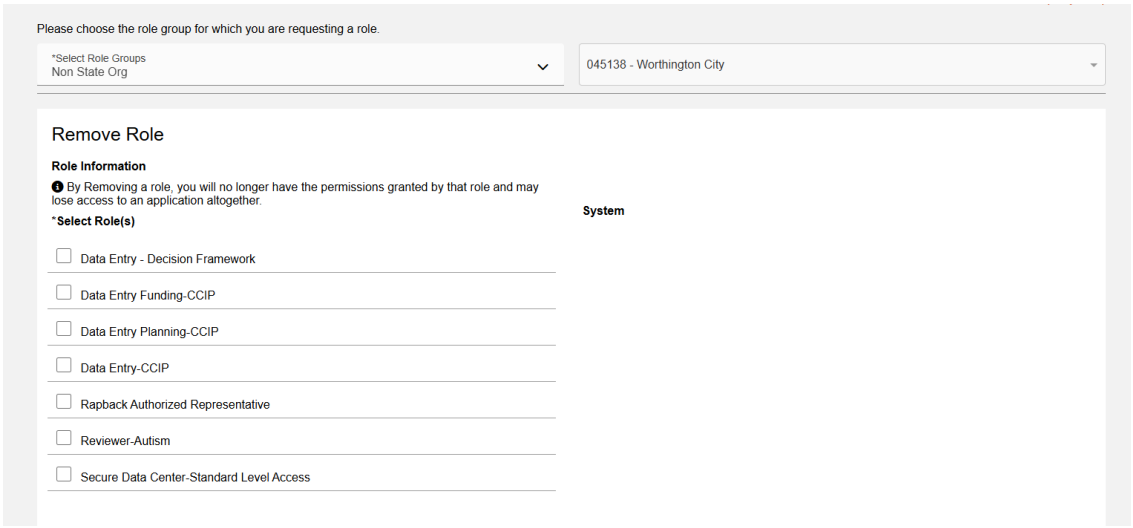


HOW DO I REMOVE AN EXISTING ROLE?

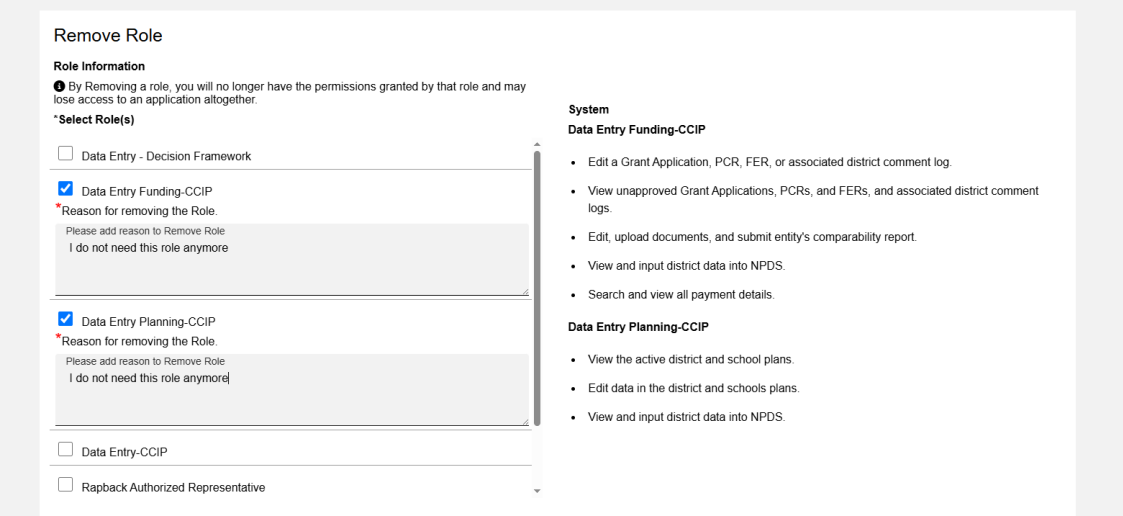
- Click on the **Remove Role** tile.



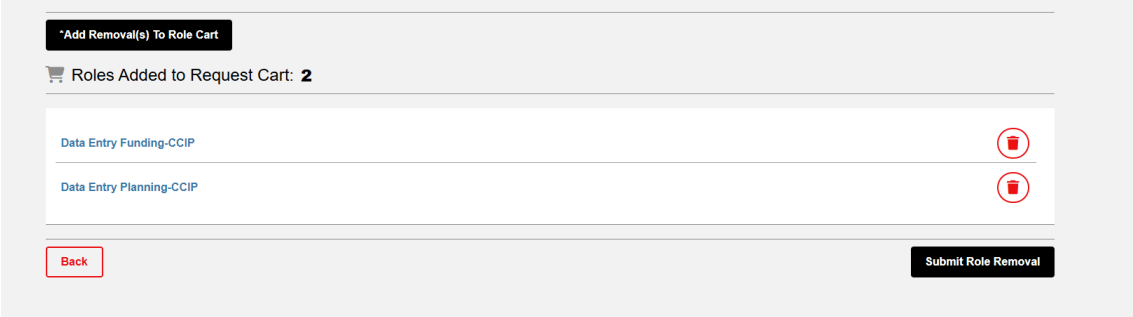
- The user will see a list of roles they are currently assigned under the Remove Role section.



- The user can select one or multiple roles to remove. The user must enter a reason they want to remove the role. The user can see what permissions they will lose by removing the role on the right side of the screen.

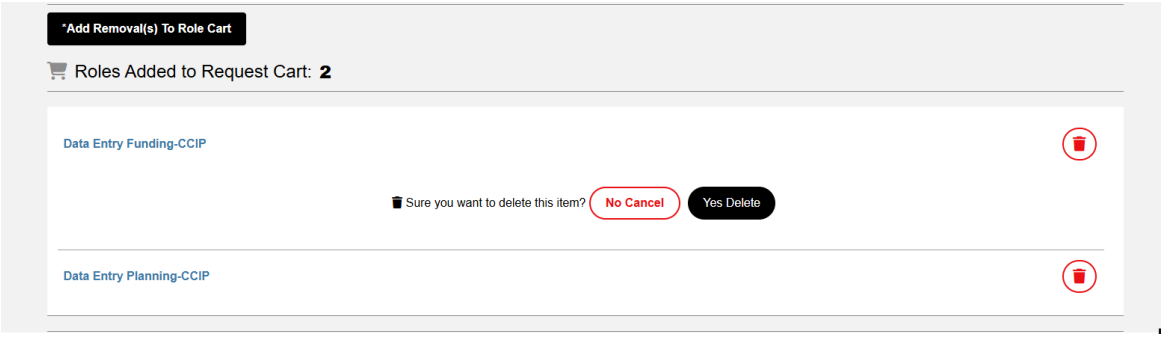


- Once the user selects the roles they no longer need, the user will click the Add Removal(s) To Role Cart button. The selected roles will be displayed in the cart.

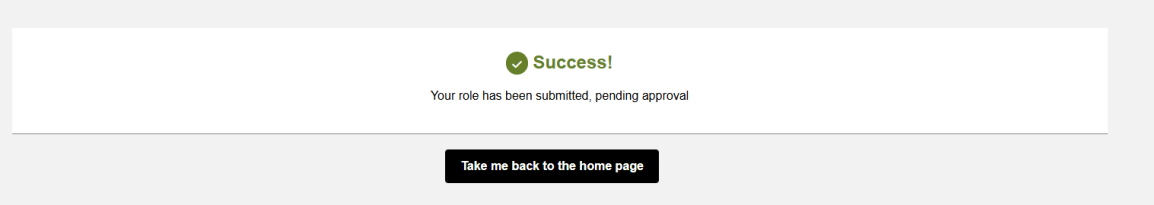


- Users can delete added roles from their cart by clicking on the delete button (trash can in red). This will display confirmation to the user. If the user wants to delete, the user will select the Yes Delete button.

- If the user does not want to delete the role from their role cart, they will select the No Cancel button.



- Once the user selects the Submit Role Removal button, they will see a success confirmation message.



- Depending on the role, it will either be removed or submitted for approval before removal.

- Clicking the Take me back to the home page button will navigate the user back to the Role Management home screen.

(end)