

# Assigning Roles in OEDS

## Step by Step

### Step 1

User must be the **OEDS Organization Administrator** for their organization. (For some organizations the role of Superintendent or Treasurer will suffice.)

### Step 2

Log into OEDS and navigate to the organization's **Overview** page. Click on the **Personnel** tab located under the organization's name.

### Step 3

Review the list of **Roles Associated to the Organization** found in the top panel of the Personnel page to see what roles are already assigned and to whom. Use the SEARCH box to limit the list of roles.

ROLES IN ORGANIZATION	DESCRIPTION	NO OF PERSONS IN ROLE	ADD	REMOVE
Data Entry Funding-CCIP	Data Entry Funding-CCIP	9 Persons		
Data Entry Planning-CCIP	Data Entry Planning-CCIP	8 Persons		

### Step 4

Review the **Persons in this Organization** found in the bottom panel of that same page to see persons already assigned to roles within organization. Use the ADD, EDIT and REMOVE buttons as appropriate.

NAME	ROLE ASSIGNED	DATE OF BIRTH	LAST 4 SSN	SAFE FLAG	PERSON TITLE	ROLE STATUS	ROLE START DATE	ROLE END DATE	ADD	EDIT	REMOVE
[REDACTED]	Data Entry Planning-CCIP	03/22/1975		Yes		Active	05/25/2005	12/31/2500			
[REDACTED]	Data Entry Funding-CCIP	03/22/1975		Yes		Active	05/25/2005	12/31/2500			

### Step 5

Refer to **Help Text** located on the right hand side of the screen for directions related to each panel on the page.

**Help Text**

**ROLES ASSOCIATED TO THIS ORGANIZATION SECTION**

**PERSONS IN THIS ORGANIZATION SECTION**

**CONTACT INFO**

**ROLES ASSOCIATED TO THIS ORGANIZATION SECTION**

- To Add Person(s) to Existing Role:
  - Click on Add
- To Remove Person(s) from Existing Role:
  - Click on Remove
- To View the Person(s) for Existing Role:
  - Click on No. of Person(s)

**Help Text**

**ROLES ASSOCIATED TO THIS ORGANIZATION SECTION**

**PERSONS IN THIS ORGANIZATION SECTION**

**CONTACT INFO**

**PERSONS IN THIS ORGANIZATION SECTION**

- To Add Role to Existing Person:
  - Click on Add
- To Assign Different Role for Existing Person:
  - Click on Edit
- To Remove Persons from Existing Role:
  - Click on Remove

**Help Text**

**ROLES ASSOCIATED TO THIS ORGANIZATION SECTION**

**PERSONS IN THIS ORGANIZATION SECTION**

**CONTACT INFO**

**FOR ANY QUESTIONS**

- Please Contact [OEDS.ContactUs@education.ohio.gov](mailto:OEDS.ContactUs@education.ohio.gov)