Table of Contents

**Adding Users To OEDS** .................................................. 3
  Creating an OHID account ........................................ 3
  Creating a Department of Education Profile ..................... 8

**Getting to the School Details** ........................................ 17

**Changing A School name or Operating Status** .................. 19

**Changing School Type or Grade Span** ............................ 21

**Changing School Classification** ..................................... 22

**Changing District or School Locations** .......................... 23

**Getting to Relationship Details** .................................... 26

**Adding or Changing Information Technology Centers (ITC)** ... 27

**Requesting a New Organization** ...................................... 30

**Assign or Remove User Roles** ....................................... 39
  Assigning a Role .......................................................... 42
  Removing a Role ............................................................ 44

**Updating Emails and Phone Numbers** ............................ 45
  Updating Email Addresses ............................................ 47
  Adding Additional Email Addresses ............................... 49
  Deleting Email Addresses ............................................ 49
  Updating Phone Numbers ............................................. 51
  Adding Additional Phone Numbers ............................... 53
  Deleting Phone Numbers ............................................. 54
ADDING USERS TO OEDS

Adding users to the OEDS system requires them to have an OH|ID account and for them to complete a Department of Education Profile inside their OH|ID account.

**Note:** OH|ID accounts are managed by the Innovate Ohio Platform and are NOT part of OEDS. Any questions about OH|ID account creation and updating should be directed to the OH|ID Helpdesk at 877-644-6338 or Profile.Help@education.ohio.gov

The following steps to create an OH|ID account and complete a Department of Education Profile are taken from the “OHID Job Aid - Account Creation” document linked to this text.

**Creating an OH|ID account**

To create an OH|ID account, go to https://ohid.ohio.gov and click the Create OH|ID account button.

**Entering a valid Email address**

Next, enter a valid email address. A Personal Identification Number (PIN) will be sent to the address provided to confirm you are able to receive email.
The email from the OH|ID system will look similar to the one below.

Enter the PIN from the email into the application.
**Entering Personal Information**
With email verified, enter your **name, date of birth** and **last four digits of your social security number**. The social security number will be used when verifying your identity for access to Department of Education applications; while listed as optional here, it will be required later.

**Picking a username**
Enter a username that will be used to access your OH|ID account in the future.
Picking a password
Next, select a password for your OH|ID account.

Set account recovery options
It is very important set account recovery options so you never lose access to your OH|ID account.
Agreeing to the terms and conditions
You will be required to agree to the terms and conditions of the OH|ID system, confirming that you are human by solving a simple word puzzle.

OH|ID account set up is complete
You should receive a confirmation email that your OH|ID account has been created.
Creating a Department of Education Profile

To create a Department of Education Profile, go to https://ohid.ohio.gov and log in with your OH|ID account.

If your account is new and you have not yet set up any applications, you should see a screen like the one below that asks you to visit the App Store. The Department Profile application is obtained at the App Store.
App Store
Click the link to visit the app store. The Department of Education profile application may be on this first page or you may need to search for it.

Select the Department of Education Profile application and Request Access.
Agree to accept the terms and conditions of using the Department of Education data systems.
Once you have submitted your access request, you should be able to see the application on your OH|ID account main page under **My Apps**.

**Department of Education Profile Setup Application**

Open the app and click **Create Profile** to begin the profile application.
Entering Personal Information
Provide some basic details about yourself.

- Why you are requesting access
- Your Name
- Previous last names
- Last 4 digits of your social security number
- Your birthdate

This information is used to verify your identity before granting you access to any education data.
All information entered in this form should match what is listed on verification documents. The list of acceptable verification documents can be seen on the page and in the image below.

Acceptable Verification Documents

The Ohio Department of Department of Education requires that all Department of Education Profiles be validated against verifiable forms of identification. ID Verification ensures the department can be reasonably sure of the identity of users who are accessing the Department’s applications. This increases security for all Department of Education educators, students, and families in Ohio. To be automatically verified, a user can submit information from a current and valid State of Ohio issued identity card (Ohio Driver License or State Identification Card). For details about State of Ohio issued identity cards, please visit http://www.bmv.ohio.gov.

If a user does not have a current or valid State of Ohio issued identity card, their identity will need to be verified with an acceptable alternate form of identity that can be scanned or photographed and submitted online. Approved forms of alternate IDs must contain a photo, name, DOB, gender, and ID number. All IDs must be current and valid at the time of submission.

Specific IDs that are accepted are:
- Driver license or ID card issued by any U.S. State or U.S. Territory provided it contains a photograph, name, date of birth, gender, and address
- U.S. Passport or U.S Passport Card
- US Military ID including Military Dependent’s ID
- Foreign passport that contains photo, name, DOB, gender, and ID number
- Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on an immigrant visa
- Permanent Resident Card or Alien Registration Receipt Card (Form I-551)
**Additional details**
Complete the second page of the application, then upload a copy of your verification documents. Finally, confirm agreement to the terms and services of using the Department of Education’s information systems.
**Verification**

After submitting your application, you will receive an email to verify your submission by following a provided link and entering the included **Confirmation Key**.

Once your application is submitted it will be sent for verification. As verification may take several days to complete, be sure to complete the application as soon as possible.
Connecting your Department Profile to your OH|ID account
Once your application is reviewed and approved, your Department of Education Profile Setup application will indicate your status is “Approved.” You now can login. This will connect your Department Profile with your OH|ID account, enabling you to be granted Roles in OEDS.
GETTING TO THE SCHOOL DETAILS

After logging into OEDS and searching for the building, you should see a screen similar to the one below.

Details about your organization appear in the box labeled “Organization” in the upper left of the screen. Click “Show or Update Organization Details” to edit this information.

The Organization Details page will appear similar to the one below. Information contained in the Organization Identity and School Information boxes can be updated by clicking the blue EDIT button. Contact information can be adjusted and additional classifications added as well.
Popup dialog boxes enable information to be updated and submitted for approval by the OEDS team at the Ohio Department of Education.
**CHANGING A SCHOOL NAME OR OPERATING STATUS**

Change a school name or update its operating status on the Details page for that school. Click **Edit** in the **Organization Identity** box. See “**Getting to the School Details**” in this document for more about how to find this page and the edit button for this information.

Click the **Edit** button. You should see a popup similar to the one below.

![Organization Identity popup](image)

On this screen you will be able to enter a new name for your school in the “**Long Name**” field. The “**Short Name**” allows you to add an abbreviated version of the name. For example, the Long Name may be “Adam Smith Elementary” and the Short Name could be “Adam Smith.”
To change the Operating Status of a building you select the option you would like from the drop-down list under Organization Status. Please note the “Merged” option is no longer used. Please contact the OEDS help desk for guidance if you intend to combine schools.

Once you have entered a new Name or Operating Status you must click the “Submit for Approval” button. This will create a change request in the OEDS system that must be reviewed by an OEDS administrator at the Ohio Department of Education. These requests are put into a queue and reviewed in the order they are received.

For name changes, there typically are no follow-up questions. However for status changes, the Department reviewer may reach out to ask for clarification or reasoning for the change.

To speed up this process, you can always send an email to the OEDS help desk detailing changes you would like to make before you actually enter them into the OEDs system. A reviewer will contact you to discuss your changes and guide you through entering them and the approval process.
CHANGING SCHOOL TYPE OR GRADE SPAN

To change a school type or adjust the grade levels served, navigate to the Details Page for that school and “Edit” the information in the “School Information” box. The section “Getting to the School Details” in this document shows how to find this page and the edit button for this information.

Click the **Edit** button to see a popup similar to the one below.

On this screen you will be able to select a “School Type” that reflects the grades being served. To help determine which School Type to select, look for the highest grade level served at this site and select the type that best matches this grade level from the drop-down list.

You also can select each individual grade served at this site. The field “Grade Span of School” will display the final list of grades that have been selected. Please be sure to review this before submitting for approval.

Submitting the changes will create a change request in the OEDS system that must be reviewed by an OEDS administrator at the Ohio Department of Education. These requests are put into a queue and reviewed in the order they are received.

For grade span changes, the internal review team typically follows up with questions about the nature of the changes and the reasoning to ensure all students are still being served.

To speed up the approval process for grade span changes, you can always send an email to the [OEDS help desk](mailto:OEDShelpdesk@education.ohio.gov) detailing changes you would like to make before you actually enter them into the OEDS system. A reviewer will contact you to discuss your changes and guide you through the approval process.
CHANGING SCHOOL CLASSIFICATION

To add or change a School Classification, you will need to navigate to the Details Page for that school. Click the “Add Classification” button in the “School Classification” box. The section “Getting to the School Details” in this document shows how to find this page and the Add button for this information.

Click the “Add Classification” button to see a popup similar to the one below.

Select the classification that best reflects the nature of your school before Submitting for Approval. Submitting changes to classifications will create a change request in the OEDS system that must be reviewed by an OEDS administrator at the Ohio Department of Education. These requests are put into a queue and reviewed in the order they are received.

For classification changes, the internal review team typically follows up with questions about the nature of the changes and the reasoning so that they can ensure the proper classification has been selected.

To speed up the approval process for classification changes, you can always send an email to the OEDS help desk detailing changes you would like to make before you actually enter them into the OEDS system. A reviewer will contact you to discuss your changes and guide you through the approval process.
CHANGING DISTRICT OR SCHOOL LOCATIONS

After logging into OEDS and searching for the building, you should see a screen similar to the one below.

To get to the Location Details page where you will be able to edit addresses, find the box labeled “Addresses” in the upper right of the screen. Click the “Show or Update Addresses” button to access a Location page similar to the one below and edit this information.
To edit the Address, click the Edit button below the address you wish to change.
You should see a popup similar to the one below.

NOTE: Editing Location Name does not change the name of the building or the district. This is simply a name used to help you identify the addresses.

You will be able to edit Location Name, Street Name and Number, City, State, County and Zip.

Before Submitting for Approval, please click the blue "Standardize" button. This will match the address you have entered with exact addresses on file with the United States Postal Service. If the address cannot be standardized, you still can Submit for Approval but we ask that you send an email to the OEDS help desk confirming the address is correct as you entered it.

Submitting the changes will create a change request in the OEDS system that must be reviewed by an OEDS administrator at the Ohio Department of Education. These requests are put into a queue and reviewed in the order they are received.

For Address changes, the internal review team typically does not have follow-up questions, but they may reach out if they are unable to standardize the address themselves.
GETTING TO RELATIONSHIP DETAILS

After logging into OEDS and searching for the building, you should see a screen similar to the one below.

To get to the Relationship Details page where you will be able to edit connections with other organizations, click “Show or Update Relationships” in the Relationships box.
ADDING OR CHANGING INFORMATION TECHNOLOGY CENTERS (ITC)

Change the Information Technology Center connected to a district on the Relationship Details page for that district or building. The section “Getting to Relationship Details” of this document walks though how to navigate to this page.

The Relationship Details page should look similar to the one below.

![Relationship Details Page](image)

If there is not an Information Technology Center attached to the district, one can be added by using the green “Add New Parent Relationship” button near the top of the page. If there is already an ITC attached to the district, then look though the list of relationships for one labeled “Data Acquisition Site.” Click the Edit and Remove buttons on the right-hand side of the screen to edit this relationship.

**Note:** If you are not able to edit this relationship, use the “Add New Parent Relationship” button to create a new Data Acquisition Site relationship, then email the OEDS Helpdesk at OEDS.ContactUs@education.ohio.gov to report the issue and have the old relationship removed.

The next pages cover both editing a current relationship and establishing a new one.
EDITING A DATA ACQUISITION SITE RELATIONSHIP

If you are able to edit a relationship, you will see a screen similar to the one above. Here you will be asked to enter the name or IRN of the ITC you would like to use as a Data Acquisition Site. Once you select a new ITC, you must **Submit** it for approval.

Submitting changes to relationships will create a change request in the OEDS system that must be reviewed by an OEDS administrator at the Ohio Department of Education. These requests are put into a queue and reviewed in the order they are received.

For relationship changes, the internal review team typically follows up with questions about the nature of the changes and the reasoning so that they can ensure the proper connections between organizations are being made.

To speed up the approval process for ITC changes, you can always send an email to the [OEDS help desk](#) detailing:

1. Why you requested the change
2. What date you would like it to take effect
3. Name and IRN of the new ITC
4. Your district’s IRN

A reviewer will contact you to discuss your changes and guide you through the approval process.
If you are unable to edit the current relationship, you may simply need to add the new relationship you wish to set up. Select “Data Acquisition Site” and again enter the Name or IRN of the ITC you would like to use. Once you have entered this information, click Submit for Approval.

Submitting changes to relationships will create a change request in the OEDS system that must be reviewed by an OEDS administrator at the Ohio Department of Education. These requests are put into a queue and reviewed in the order they are received.

For relationship changes the internal review team typically follows up with questions about the nature of the changes and the reasoning so that they can ensure the proper connections between organizations are being made.

To speed up the approval process for ITC changes you can always send an email to the OEDS help desk detailing:

1. Why you requested the change
2. What date you would like it to take effect
3. What the ITC you are switching to is along with their IRN
4. Your district’s IRN

A reviewer will contact you to discuss your changes and guide you through the approval process.
REQUESTING A NEW ORGANIZATION

To open a new IRN you must create an organization. Click “Create organization” on the top menu bar to see a screen similar to the one below. This page contains instructions on how to request a new IRN, as well as the required roles in OEDS for making this request.

Once you are sure the appropriate person is making the request, you can begin creating a new organization.

Begin by providing basic information such as
- Organization type (typically, this will be a public school)
- A name for this IRN (typically what the school will be called)
- The physical address this IRN will operate from
- The mailing address for this IRN
- The grade span that this IRN will serve

The next few pages will go through the screens you see as part of a new organization application.
Application page 1.

To begin, click the “Click Here to Start” link on the application. This will open a pop-up dialog box with a series of questions that determine the Organization type that gets filled in on the application. The dialog box should appear similar to the one shown below.

Typically, this is answered by selecting that your organization is a school.
After the first set of questions is answered, a second set of questions will appear that should look similar to the one below. Typically, this is answered that you are a Superintendent, Treasurer or OEDS-R administrator attempting to set up a public school.

Once you have answered these questions and pressed the green Save button, the Organization Type will be filled in on the first page of the application. You now are able to enter the name of the new organization.

**Note:** Organization Name Should not the name of your district it is the name that you want the resulting building/organization to be called once a new IRN is created.

You will also be asked to provide the IRN’s county of operation and some basic contact information.
Application page 2.

Here you are asked to enter the organization’s physical operating location. Please attempt to standardize the address by clicking the **Standardize** button after you have entered it and before moving on to the next step.
Application page 3.

Enter the mailing address for the organization. Often this is separate from the physical address as mail is routed to a district office. Again, please attempt to standardize the address by clicking the **Standardize** button before moving on to the next step.
Application page 4.

On this page you will be asked about Tax ID and DUNS numbers. You DO NOT need to have these to complete the application. The only information required on this page is the grade levels you wish to serve and any hierarchy organization you wish to operate under (such as your district).
Application page 5.

This page will allow you to upload any supporting documents you want to attach to this application.
Application page 6.

This page allows you to review all the information you provided before you submit it for approval. If you leave the application before clicking **Submit**, it will not be sent for approval as it will show a status of “Started” in the OEDS system and not “Submitted.”
Once an organization request is submitted, it will create a change request in the OEDS system that must be reviewed by an OEDS administrator at the Ohio Department of Education. These requests are put into a queue and reviewed in the order they are received.

For New Organization requests, the internal review team typically follows up with questions about the nature of the request and the reasoning so that they can ensure all students in a district are accounted for and explain any additional changes that maybe needed.

To speed up this process, you can always send an email to the OEDS help desk detailing changes you would like to make before you actually enter them into the OEDS system. A reviewer will contact you to discuss your changes and guide you through entering them and the approval process.

**Note:** Once an IRN has gone through the approval process and a number has been issued, the status in OEDS will show the IRN as “Under Construction” until a status change request is made to set it to “Open.” The section “Changing a School Name or Operating Status” in this document covers how to do this. We typically recommend waiting until the end of the current reporting period to change the IRN status to open (beginning of August).

It also is important to note that a safety plan is required for any New and Open IRN. Also, if the grade span includes a preschool, then the district will need to work with the Office or Early Learning to have the new IRN entered into their system. Contact the Office or Early Learning at oelsr.licensing@education.ohio.gov.
ASSIGN OR REMOVE USER ROLES

After logging into OEDS and searching for your building or district, you should see a screen similar to the one below.

To edit Role assignments for your building or district, click the “Show All Roles and Persons” button in the Roles box.
The Personnel details page should look similar to the one below. Here you can see the “Roles Available to This Organization” box which is where the current list of roles that can be assigned are displayed, as well as the “Persons in This Organization” box which is where you can find a list of all roles assigned to a specific person in your organization.

To add or remove a user from a Role, it often is easiest to search for the role name in the “Roles Available to This Organization” box. Using the search bar in this box will simplify the search by filtering the list of roles shown.
With the list of available roles filtered you can now use the **Green + button** to add a user to that role or the **red trash can button** to remove a user from that role.

**Note:** Some roles only allow one person to be assigned at a time. The example here shows that only one person can be assigned to the Superintendent role. Before a new Superintendent can be entered, the previous Superintendent must be removed.
Assigning a Role
Clicking the Green + button next to the role you wish to modify will open a screen that looks like the one below.

There are several options to search for the person you would like to assign to a role. The box “Start Assigning a Role” displays the role that you are assigning and asks if this role will be assigned to a new person or to someone who already holds it. Using the option “Assign a New Person to This Role” enables a search for anyone in the OEDS system.

In the second step is to provide the person’s First and Last name, as well as their Date of Birth. Then use the search button to retrieve a list of possible people.
The search results will display the name and date of birth for any possible matches to your search. Select the person to assign a role.

![Search Result](image)

**Note:** If you are unable to find a user, they may not have completed the set up their OH|ID account or their Department of Education Profile. **Both steps must be completed before a user can be assigned a role in OEDS.** [This document](#) shows the steps needed to setup an OH|ID account and complete an Ohio Department of Education profile (Department profile steps start on page 6).

Once you have selected a user for assignment, a confirmation screen will appear that looks like the one below.

![Submit to Add Selected Person to Organization Role](image)

Here you can see the name, date of birth, the role you are assigning and the users email address.

If these are correct, click the green **Save** button to assign the role to the user.
Removing a Role

To remove a person from a role, click the red trash can button next to the role on the Roles Available to this Organization page. The section “Assign or Remove User Roles” of this document walks though how to navigate these steps. You will see a confirmation screen that looks like the one below.

The Remove Persons From Role screen lists users in your organization who have been assigned this role. Click the check box next to the person to be removed from this role, then click the red Yes, Remove button to complete the removal.
UPDATING EMAILS AND PHONE NUMBERS

Each school and district staff person with a record in OEDS must have an accurate and up-to-date office email address and office phone number listed in the Ohio Education Directory System (OEDS). This ensures that staff members can be reached by the public and staff at the Ohio Department of Education.

It is not always possible for OEDS Organization Administrators to update other individuals’ email addresses and phone numbers. It is very important that each person updates their own information each time moving from one organization to another or experience a significant change and to regularly ensure their personal information remains current. A best practice is for organizations and administrators to encourage annual reviews of email addresses and phone numbers. Follow the steps below to update OEDS contact information.

Navigate to the OH|ID system at https://safe.ode.state.oh.us/portal and click on the OH|ID portal.

Log into OH|ID.
Locate the Ohio Education Directory System (OEDS) application tile and click on Open App to go to your dashboard.

Locate and click on Your Name at the top of your dashboard.

If someone else’s name appears at the top of the page, log out of the OEDS and OH|ID systems and begin again using your own credentials.
From your Home Page, click on the type of information to be reviewed and updated.

![Home Page Screenshot]

**Updating Email Addresses**
School and district staff listed with roles in OEDS must have a current primary office email address listed in OEDS and can have additional secondary office email addresses listed. It is important that the primary office email address be the email address that the person most often uses for work purposes.

Click **EDIT** in the **MANAGE EMAIL ADDRESS** box to update this email address.

![Email Management Screenshot]

**Note:** Home (personal) email addresses are **NOT** to be entered into OEDS.
If your email address is incorrect or your personal email address is listed, type your current office email address into the ADDRESS box.

If your email address is listed with the Home email type, change it to Office using the EMAIL TYPE dropdown box.

Check the PRIMARY EMAIL box if this is your primary office email address. Uncheck the box if you have or will be identifying another office email address as primary.

Click SAVE to see the updated information.
Adding Additional Email Addresses
Individuals who work for multiple organizations may need to have more than one office email address listed. To add an email address, click on **ADD NEW EMAIL** in the **MANAGE EMAIL ADDRESSES** box and fill in the correct information. A new email address should not be marked as primary unless you want to switch the email address that is listed as primary.

For steps to navigate to this menu see the beginning of the “Updating Emails and Phone Numbers” section of this document.
Deleting Email Addresses
Any extraneous email addresses, including Home (personal) email addresses can be deleted from the OEDS system. Click on DELETE in the MANAGE EMAIL ADDRESS box to remove an existing email address.

Click DELETE again in the popup window to confirm that you want to delete your email address. Click CANCEL if you do not want to delete your email address.
Updating Phone Numbers
School and district staff listed with roles in OEDS must have at least one primary office phone number listed in OEDS. This should be the phone number that is used most often for work purposes. **Do not** have a Home (personal) phone number entered in to OEDS, but you may also have a cell phone number listed. Click on **EDIT** in the **MANAGE PHONE NUMBER** box to update your phone number.

For steps to navigate to this menu, see the beginning of the “**Updating Emails and Phone Numbers**” section of this document.

If your area code and/or phone number are incorrect type your current area code and phone number into the respective boxes. Type in an extension if one is needed.

If your phone number is listed as Home, change it to Office using the **PHONE TYPE** dropdown box.
Check the PRIMARY PHONE box if this is your primary office phone number. Uncheck the box if you have or will be identifying another office phone number as primary.

Click SAVE to see the updated information.
Adding Additional Phone Numbers

Individuals who work for multiple organizations may need to have more than one office phone number listed. To add a new phone number, click on **NEW PHONE NUMBER** in the **MANAGE PHONE NUMBERS** box and fill in the correct information. A new phone number should not be marked as primary unless you want to switch the phone number that currently is listed as primary.

For steps to navigate to this menu see the beginning of the “Updating Emails and Phone Numbers” section of this document.
Deleting Phone Numbers

Any extraneous phone numbers, including Home (personal) phone numbers can be deleted from the OEDS system. Click **DELETE** in the **MANAGE PHONE NUMBERS** box to remove a phone number.

For steps to navigate to this menu see the beginning of the “Updating Emails and Phone Numbers” section of this document.

Click **DELETE** again in the popup window to confirm that you want to delete your phone number. You can click **CANCEL** if you do not want to delete your phone number.