

CTEIS 2.0 Web

Fiscal Agent (Level 5) MEIS Account Activation Instructions



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Fiscal Agency Authorized Individual MEIS Account Activation Instructions

It will be the responsibility of each Fiscal Agency’s Authorized Individual (Level Five) to assign Users *and* activate those Users’ MEIS Accounts within CTEIS for the purpose of data entry and state reporting. Each L5 will be set up in the CTEIS system beforehand and they will be able to log into the system using their MEIS Login and Password. At that point, they will identify all Users responsible for data entry and reporting for buildings within their Fiscal Agency. They will also assign Users their “Domain” and access level.

- 1) As a level 5, you will need to log into CTEIS at www.cteis.com using your MEIS Username and Password.

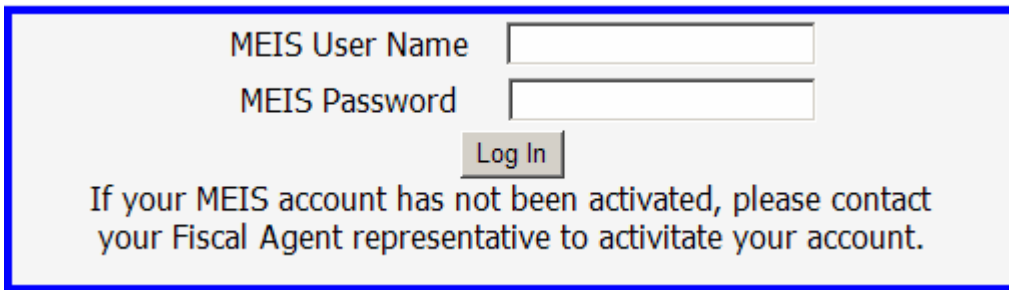


Figure 1

- 2) Navigate to the “Add User” area using the menu.



Figure 2

- 3) Press the “Add New User” button to begin the entry process.

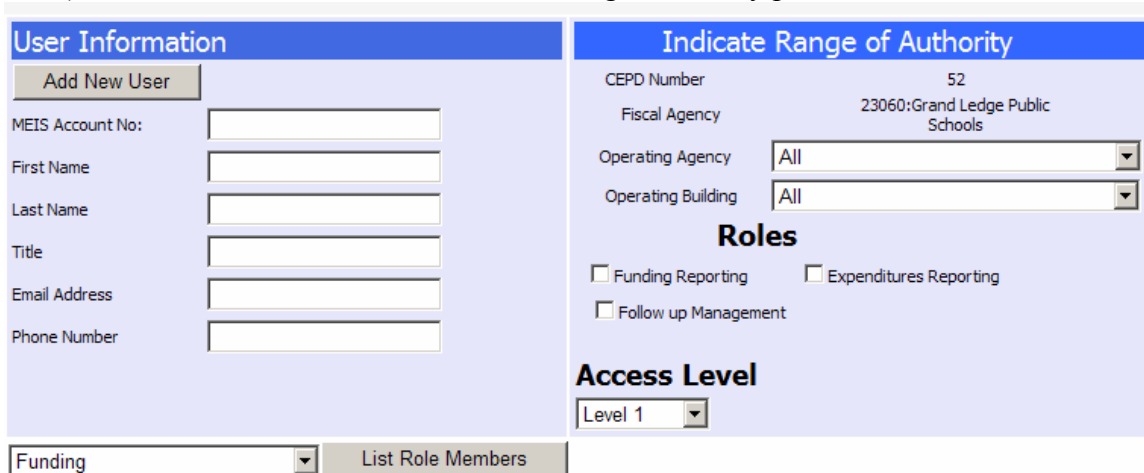


Figure 3

4) Enter New User Information

You will need to enter the following pieces of information:

User Information

MEIS Account No: The User’s MEIS account number. It is important that this be accurately entered as this is what connects the MEIS Login to CTEIS. If this is incorrect, the User will be unable to login. Reminder: the letter “A” **must** be capitalized at the beginning of the User’s account number.

First Name: Enter the First Name of the User

Last Name: Enter the Last Name of the User.

Title: Enter the Job Title of the User.

Email Address: Enter the email address of the User. For the system to properly send emails, this must be accurate. Further, it must be unique. Two people cannot share the same email address

Phone Number: Enter a phone number for the User.

Range of Authority (Domain)

The range of authority, or domain, determines what buildings a User will have access to. If you want the User to have access to all buildings within a Fiscal Agency, leave the Operating Agency and Operating Building selections at “All.” If you would like to limit what buildings Users have access to, you can first select an Operating Agency and then narrow the domain further by selecting an Operating Building. The combination of CEPD Number, Fiscal Agency, Operating Agency, and Operating Building determines what buildings a User will have access to.

The screenshot shows a web form titled "Indicate Range of Authority". The form contains the following fields and values:

- CEPD Number: 31
- Fiscal Agency: 33020:Lansing Public School District
- Operating Agency: 33020:Lansing Public School District (dropdown menu)
- Operating Building: All (dropdown menu)

The Operating Building dropdown menu is open, showing the following options:

- All
- 01044:Eastern High School
- 01166:Everett High School
- 01865:J.W. Sexton High School
- 02626:Lansing Catholic Central High School
- 05148:Hill Center

There are also two checkboxes on the left side of the form:

- Funding Reporting
- Programs Administration

Figure 4

Please Note: To add a user across multiple Fiscal Agencies, you will have to contact OCTE.

Roles

Next you will need to select the role each User will have. A User can have multiple roles.

Note: if you do not check the boxes for a User, they will not be able to do any work in CTEIS.

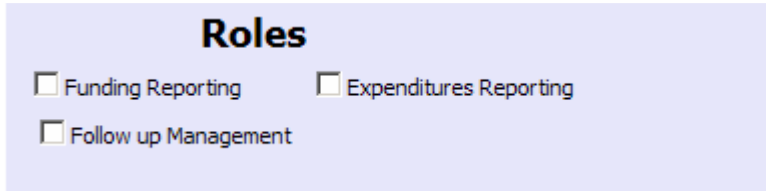


Figure 5

Role Definitions

Funding Reporting: This role corresponds to all activities related to the funding of CTE programs. This includes the inserting, updating, and editing of classes, students, teachers and enrollments. It also applies to the uploading, and potentially the exporting, of enrollment data. It will also allow a user access to run the 4483 A and D, and 4301 Reports.

Expenditures Reporting: This role will allow the User to participate in the creation of distribution tables and entry of expenditure data. It will also allow the User the ability to run error reports, the 4033, and associated expenditure reports.

Follow Up: This role will allow the User to run Follow Up Reports and complete follow Up Surveys.

Access Level

Next use the drop-down to select the appropriate access level for the User.

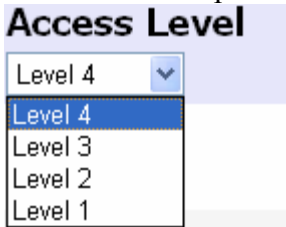


Figure 6

Level 4

- Enter and Edit Data
- Preview Reports
- Create Level 3, 2, and 1 Delegates
- Delegate roles they are assigned.

Level 3

- Enter and Edit Data
- Preview Reports

Level 2

- View school, student, and course information
- Review Reports

Level 1

- Review Reports

4) Reviewing Role Lists and Editing Users

To see a list of Users in a particular role, select that role from the drop-down list and click on the “List Role Members” button.

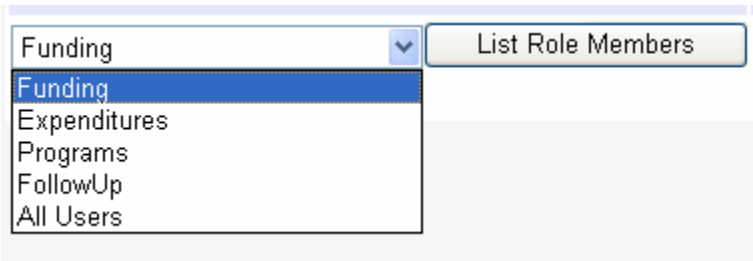


Figure 7

A list of Users will be presented below for review:

MEIS #	L. Name	F. Name	Title	CEPD	Fisc. Ag.	Oper. Dist.	Oper. Fac.	Level	Phone	email	
Select	123456	Doe	John	Princ	31	33020	9999	9999	4	555-1234	John@Doe.com

Figure 8

To edit a User, select the User in the list by clicking the **Select** link to the left of their name, and their information will populate the entry form above. Make the necessary changes you wish, and click on the “Update User” button. You CANNOT create a Level Five user.

To deactivate a User, click on the “Deactivate User” button. This User will no longer have an active account in CTEIS and will not have access to any functions in CTEIS.