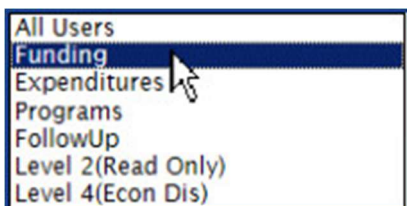


# Fall Tasks - SEPTEMBER

## Managing Users in CTEIS

FAs are tasked with granting local building reporters and CEPD Administrators the correct access privileges within the CTEIS system. To accomplish this, often you will begin by searching CTEIS to see if an existing MEIS account links to the user and then editing the account permissions:

1. Log into CTEIS at [www.cteis.com](http://www.cteis.com) with your MEIS user name and password.
2. From the left-hand navigation panel, click the **Fiscal Agent** → **Manage Users** button to open the **Search for Users** tab.
3. If necessary, from the **Fiscal Agency** drop-down list, select the Fiscal Agency district to which the building reporter or CEPD Administrator is assigned.



4. Select an option from the **List by Role** drop-down menu to display a list of CTEIS users who have an access level that matches your chosen criterion.

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*TIP: Select the "All Users" option to display a list of all MEIS accounts within your Fiscal Agency district.*

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5. Alternatively, you may search for an individual account by typing a user's last name into the **Last Name** text field and clicking the **Search** button.
6. Click the **Select** link within the displayed grid to open the **Edit User** tab and review the user profile associated with the selected account.
7. Note the checkboxes under the **Modules** sub-header of the **User Access Control** section—each item represents a set of reporting tasks that you may assign to a user. By marking these boxes and clicking the **Save User** button, you can delegate these roles to the account in view. The account's controller may then login to access the unique data features associated with the assigned roles.

### CTEIS Responsibilities of the FA

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User Access Control	
Level	Modules
<input type="radio"/> Level (1) Reports Only <input type="radio"/> Level (2) Read Only <input checked="" type="radio"/> Level (3) Data Entry <input type="radio"/> Level (4) Data Entry/Econ Dis. (Level (5) Go To Fiscal Agent)	<input type="checkbox"/> Enrollment/Funding <input checked="" type="checkbox"/> Expenditures <input checked="" type="checkbox"/> Follow-Up <input type="checkbox"/> Programs

### *Editing and Adding CTEIS Users*

From the Edit User tab, FAs have a great deal of control over how individual user accounts are maintained within the CTEIS system. You can make adjustments to the following when using this screen:

1. User account details.
2. Student data access levels and CTEIS reporting roles.
3. Access to individual building data.

At times, you may need to record the details of a new MEIS account in CTEIS to authenticate your district personnel correctly. This is accomplished on the Add User tab, which is one of the default tabs available on the Manage Users screen. For in-depth details on reviewing, editing, and adding user accounts to CTEIS, please refer to the [Manage Users Guide](#).

Manage User (Review, Add and Edit CTEIS Users)						
Search for Users		Add User				
Fiscal Agency: 84060-Education Achievement Authority						
<input type="text" value="All Users"/>		<input type="button" value="List By Role"/>		Search By: LastName		<input type="button" value="Search"/>
Select	Last Name	First Name	Title	Phone	Email	
Empty table body for user list						

## *Coordinating Expenditure and Enrollment Data Entry*

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Beginning in September, OCTE provides free webinar training designed to educate building reporters and district administrators on CTE data collection processes and to familiarize them with the CTEIS application. The fall training focuses on preparing for the Expenditures report that is due in November and beginning the Enrollment report, which districts must complete at the close of each school year.

During this time, it is important that CEPD Administrators:

- Ensure that all Expenditures data is reported fully and submitted in a timely manner.
- Assist Enrollment reporters with the proper instructional design of their courses. A Multi-Year Instructional Design report is accessible from the CTEIS navigation panel by clicking **Reports** → **Building Reports** and can help districts plan segment delivery across one to three-year programs.

FAs are strongly advised to create milestones or schedules for their reporters to adhere to so that district data is entered steadily throughout the year rather than massively at the end of the school year. Furthermore, they should strive to make district building reporters aware of upcoming training events, prepare to answer questions, and otherwise facilitate data gathering and submission. To view the various trainings offered throughout the year, click the [Register for Training](#) link located within the Documents and Materials section at [www.cteis.com](http://www.cteis.com).