

CTEIS Manage Users Guide

This document provides FA Authorized Officials instructions concerning CTEIS User Management. Included are detailed instructions on how to use the Manage Users screens.

Access Manage Users

The screenshot displays the CTEIS user management interface. The header includes the Michigan Department of Education logo and the text 'C.T.E.I.S. Michigan Department of Education'. Navigation tabs are labeled 'Data Entry', 'Admin', and 'Reports'. The 'Admin' tab is selected, showing two main sections: 'FISCAL AGENT' and 'CEPD ADMIN'. Under 'FISCAL AGENT', there is a 'FISCAL AGENT MONITORING' section with options: Enrollment Collection Submission, Expenditure Fiscal Agency Review, Expenditures Review by Building, District Follow Up Review, and View Programs. Below this is a 'MANAGE USERS' section with a 'Manage Users' link circled in red. Under 'CEPD ADMIN', there is a 'CEPD ADMIN. MONITORING' section with options: Enrollment Collection Review, CEPD Expenditures Review, CEPD Expenditures Review by Building, and CEPD Follow Up Review. Below this is a 'NEW PROGRAMS' section with options: New Programs Review, CEPD Options, and View Programs.

1. As the FA Authorized Official, you will need to log into CTEIS at www.cteis.com using your MEIS username and password.
2. Select the **Admin** option from the navigation menu.
3. Select **Fiscal Agent Monitoring** → **Manage Users** from the drop-down menu. The Manage Users screen appears.

Manage Users (Review, Add and Edit District Users)

Oakland Schools

Select Role

Please Select

Reset Form

Click on Grid to expand.

EXPORT TO EXCEL

First Name	Last Name	Title	Phone Number	MEIS Number	Active	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

User Information

First Name: *

Title:

Last Name: *

Email: *

email@email.com

MEIS Number: *

Phone Number:

Create User

The Manage Users screen allows you to:

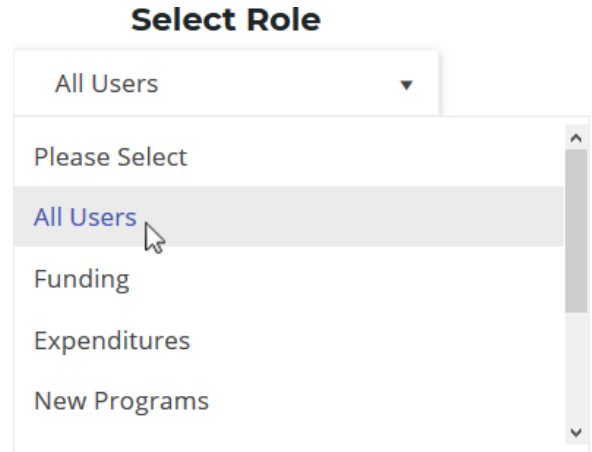
- Search for users
- Create new users

Search for Users

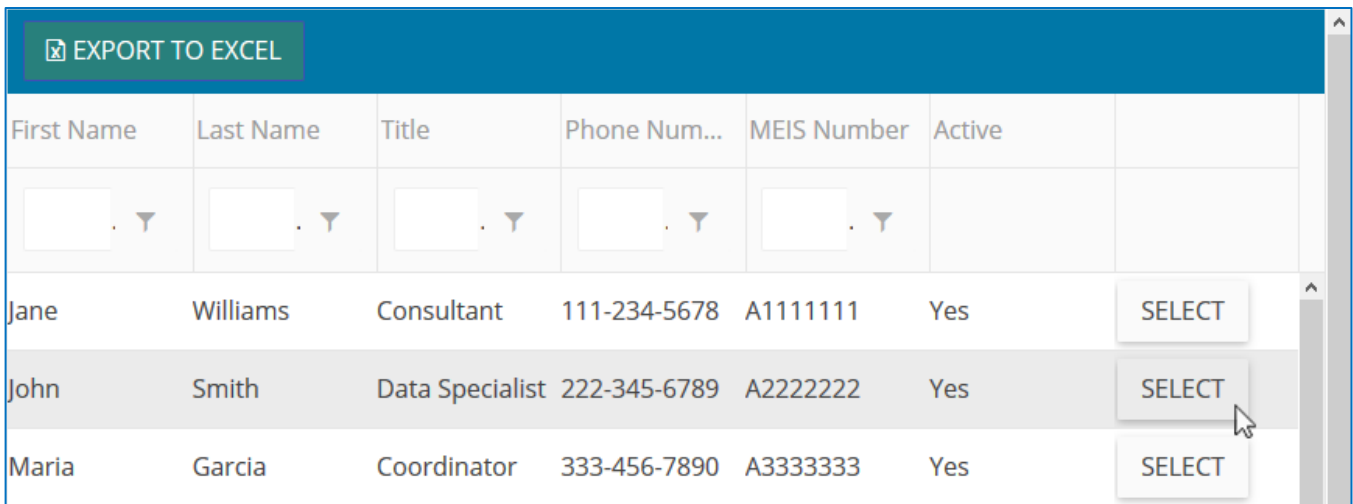
The top section of the Manage Users screen allows you to search for existing users by their role within a Fiscal Agency. You may then review and edit the selected user's information.

Search by Role

To search for a user by role, select **All Users** or another specific role from the **Select Role** drop-down list. The results are displayed in the grid based on your menu selection. You may sort this grid by clicking on its various column headers, which can help when you need to arrange your users alphabetically by name.



Review or Edit User Details



The image shows a table with a blue header bar containing an "EXPORT TO EXCEL" button. The table has columns for First Name, Last Name, Title, Phone Num..., MEIS Number, Active, and a SELECT button. The data rows are as follows:

First Name	Last Name	Title	Phone Num...	MEIS Number	Active	
Jane	Williams	Consultant	111-234-5678	A1111111	Yes	SELECT
John	Smith	Data Specialist	222-345-6789	A2222222	Yes	SELECT
Maria	Garcia	Coordinator	333-456-7890	A3333333	Yes	SELECT

Select a user by clicking the **Select** button within that user's row. **User Information** panels appear, allowing you to review or edit the information associated with an individual, including basic account information, CTEIS module control, and building access.

User Information

<p>First Name: *</p> <input style="width: 90%;" type="text" value="John"/>	<p>Title:</p> <input style="width: 90%;" type="text" value="Data Specialist"/>
<p>Last Name: *</p> <input style="width: 90%;" type="text" value="Smith"/>	<p>Email: *</p> <input style="width: 90%;" type="text" value="JSmith@myschool.edu"/>
<p>MEIS Number: *</p> <input style="width: 90%;" type="text" value="A2222222"/>	<p>Phone Number:</p> <input style="width: 90%;" type="text" value="222-345-6789"/>

<p>Level</p> <p><input type="radio"/> Level (1) Reports Only</p> <p><input type="radio"/> Level (2) Read Only</p> <p><input checked="" type="radio"/> Level (3) Data Entry</p> <p><input type="radio"/> Level (4) Data Entry/Economically Disadvantaged</p> <p>(Level (5) Go To Fiscal Agent)</p>	<p>Modules</p> <p><input checked="" type="checkbox"/> Enrollment/Funding</p> <p><input checked="" type="checkbox"/> Expenditures</p> <p><input checked="" type="checkbox"/> Follow-Up</p> <p><input checked="" type="checkbox"/> Programs</p>
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<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <p>Oakland Schools-Contracted Programs (63000/00000)</p> <p>Oakland Schools-Oakland Opportunity Academy (63000/00449)</p> <p>Walled Lake Consolidated Schools-Walled Lake Community Education Center (63290/07792)</p> </div>	<p>»</p> <p>«</p> <p>»»</p> <p>««</p> <p>×</p>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <p>Oakland Schools - Oakland Schools Technical Campus--SE(63000/08756)</p> <p>Oakland Schools - Oakland Schools Technical Campus--NE(63000/08812)</p> <p>Oakland Schools - Oakland Schools Technical Campus--NW(63000/08813)</p> <p>Oakland Schools - Oakland Schools Technical Campus--SW(63000/08814)</p> </div>
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Within the three information panels, make the necessary changes to the displayed data fields, then click **Update User**, **Update Modules**, or **Update User Buildings** to save those changes. Please refer to **User Detail Fields** below for information related to each data entry field.

Click the **Deactivate** button to deactivate the selected user. Once a user has been deactivated, that user will no longer have an active account in CTEIS and will no longer be able to login or access any CTEIS functions. An option to reactivate that user will become available, however.

Create a User

If a user does not currently exist within CTEIS, you will need to create a new user. To create a new user in the CTEIS database:

User Information

First Name: * <input type="text"/>	Title: <input type="text"/>
Last Name: * <input type="text"/>	Email: * <input type="text" value="email@email.com"/>
MEIS Number: * <input type="text" value="A0000000"/>	Phone Number: <input type="text"/>

1. Open the **Manage Users** screen. Please refer to Access Manage Users above for additional information.
2. Beneath the grid, enter user information for the new user into the available text fields. Please refer to **User Detail Fields** below for information related to each data entry field.

Note: You are unable to create another user with Level 5 FA Authorized Official permissions—Level 5 FA Authorized Officials are only created by OCTE.

3. Click the **Create User** button to save the user information.

User Detail Fields

User details are divided into three panels:

1. User Information fields
2. Access Control fields
3. Building List fields

User Information Fields

First Name/ Last Name – Enter the first and last name of the user.

Title – Enter the job title of the user.

MEIS Number – Enter the user’s MEIS account number. The MEIS account number is a seven-digit number preceded by a capitalized “A.” *Example: A1234567.*

Note: *Before a user can be entered into CTEIS, the user will need to obtain a MEIS Account number. If the user does not have one, they can create a MEIS Account via the MEIS website at <https://mdoe.state.mi.us/meis>.*

Title (Optional) – You may enter a user’s title in this field.

Email– Enter the email address of the user so the CTEIS system may send confirmation notices to the correct location. The email address must be unique - two people cannot share the same email address.

Phone Number (Optional) – You may enter a user’s phone number in this field, beginning with the area code. *Example: (517) 987-6543.*

User Information

<p>First Name: *</p> <input type="text" value="John"/>	<p>Title:</p> <input type="text" value="Data Specialist"/>
<p>Last Name: *</p> <input type="text" value="Smith"/>	<p>Email: *</p> <input type="text" value="JSmith@myschool.edu"/>
<p>MEIS Number: *</p> <input type="text" value="A2222222"/>	<p>Phone Number:</p> <input type="text" value="222-345-6789"/>

Access Control Fields

Data viewing and entry is restricted within CTEIS based on permissions you grant to its various modules and by access level.

Level	Modules
<input type="radio"/> Level (1) Reports Only	<input checked="" type="checkbox"/> Enrollment/Funding
<input type="radio"/> Level (2) Read Only	<input checked="" type="checkbox"/> Expenditures
<input checked="" type="radio"/> Level (3) Data Entry	<input checked="" type="checkbox"/> Follow-Up
<input type="radio"/> Level (4) Data Entry/Economically Disadvantaged	<input checked="" type="checkbox"/> Programs
(Level 5) Go To Fiscal Agent	
<input type="button" value="Update Modules"/>	

Level

The Level section determines the type of access a user has to district or building-level data. Each level is associated with permission to access data for viewing or reporting purposes. Only **one** level can be selected for each user, and it applies across all selected modules. Select the appropriate level of access for the user as defined below:

Level (1) Reports Only – User can only view summary reports. No individual student access is possible.

Level (2) Read Only – User can review all data entry per granted module(s) but cannot modify any data.

Level (3) Data Entry – User can view, add, edit, update, and delete student data for all granted module(s).

Level (4) Data Entry/Econ Dis – Includes the same permissions as Level 3, but the user can view Economically Disadvantaged Student data as well.

Level (5) Fiscal Agent – Identifies the Level 5 FA Authorized Official, which must be approved and implemented by OCTE.

Modules

The modules you may grant to CTEIS users are:

Enrollment/Funding – (Students, Courses, Enrollments, 4483 prep, 4301 prep)

Expenditures – (4033 prep)

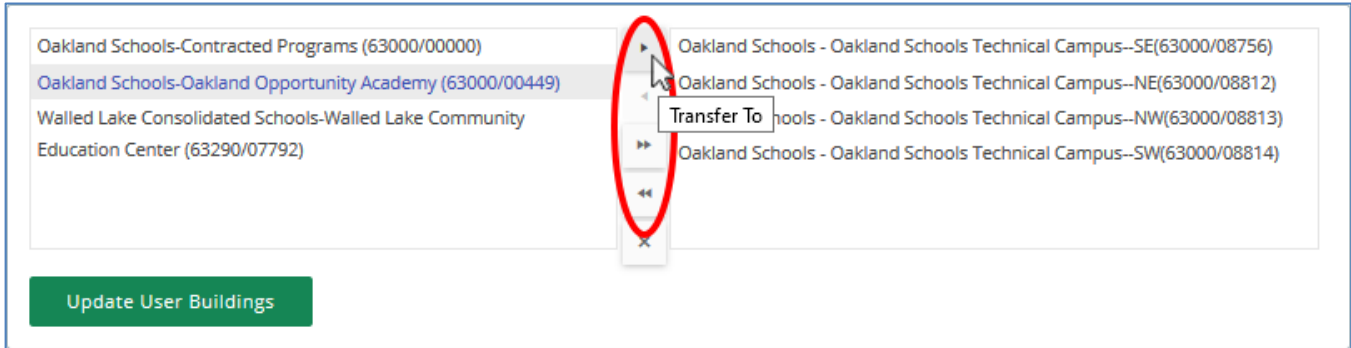
Follow-Up – (Follow-Up prep)

Programs – (New Program application submission)

You can select a single module, multiple modules, or all modules for a user. For example, a Level 3 user can have data entry access to the Expenditures and Follow-Up modules. This will allow the user to review and edit data reported for the Expenditures and Follow-Up submissions.

Building List Fields

The role of the FA Authorized Official is to grant all users, including themselves, CEPD administrators, and building reporters, access to buildings within their fiscal agency. You assign access on a building-by-building basis. For example, in a fiscal agency with 3 buildings, you may grant a user access to one, two, or all three of those buildings.



Available Operating Buildings List – Lists the available operating buildings for the Fiscal Agency being represented.

Selected Operating Buildings List: Lists the operating buildings that have been assigned to a particular CTEIS user.

You may add and remove selected buildings by clicking the triangular buttons between the Available and Selected Operating Buildings Lists.

Users with Data Entry in Other Fiscal Agencies

If you have a user that will be entering CTEIS data in another fiscal agency district, that agency's FA Authorized Official will need to add the user and assign the correct buildings. Please refer that FA Authorized Official to **Create a User**, above.