How To Invite Staff Members and Configure Locations and Classrooms

Getting Started · https://behca.com/support/how-to-invite-staff-members-and-configure-locations-and-classrooms/

When adding new staff members, first start by adding any locations or classrooms - these are called **Groups** in BEHCA.

Adding Groups (Locations or Classrooms)

1. Log into the BEHCA application on a desktop or tablet (configuration of these features are not available via the mobile app). Click on the  at the top right of the screen and select **Manage Groups.**
2. Click the **Create New Group** button and provide the following details:
    1. Group Name (this should be something simple, like "*Portland Location*" or "*5th Grade Class*")
    2. Description (*optional* - a description of what the group is for or who will be associated with this group)
3. If you already have them configured, you can add staff members and profiles to this group by checking the box in front of their names. If not, you can return to this group later to configure this pairing.

Adding New Profiles

1. Click on the  at the top right of the screen and select **Manage Profiles.**
2. Click on the **Add New Profile** button.
3. Add new profiles one at a time by clicking the **+Add New Profile** button, or upload a spreadsheet of individuals that you have prepared using the provided sample Excel file in the instructions on the **Import Profiles** tab.

Adding New Team Members (Staff or Guests)

1. Click on the  at the top right of the screen and select **Manage Team**
2. Click the **Add New Team Member** button and provide the following details:
    1. First Name
    2. Last Name
    3. Email Address (if this email address is already registered with a BEHCA account it will be recognized and matched to the existing user)
    4. Account Type
        - **Manager:** Account Managers inherit the same permissions as a full account owner. Managers can:
            - invite new staff members and guests
            - manage existing staff members and guests
            - view, create, and manage all groups
            - view, create, and manage all profiles
            - configure MAR and review MAR changes
            - create and view IRs, including restricted IRs
            - Managers cannot access billing or organization settings
        - **Staff:**
            - Staff Members are general users within an organization that do not manage other staff. Add Staff members to groups and configure their permissions so they can get access to the profiles they manage.
            - Staff members assigned the "Exec Director, Supervisor" role will also be able to review and approve IRs and MAR changes.
        - **Guest:**
            - Guest accounts are for inviting one person to one or more profiles, like a parent, guardian, or a doctor. Guests are not staff members, are external to the organization, and cannot be added to groups.

5. Role (click "*Help me decide*" to see a list of Roles and their associated permissions)
6. Permissions (this is set automatically by the role selected but can be customized for every individual)
    1. Track Data: allows this individual to track data and enter general notes and **@mention** other users
    2. Edit Profile: allows this individual to customize each profile they are assigned to, like adding new data points to track
    3. Edit MAR: allows this individual to administer medications
    4. Edit IR: allows this individual to create new and view existing Incident Reports
7. Groups and Profiles: On the panel to the right, check the box next to each Group (for staff members) or Profiles (for Guests) this user should be associated with.

PLEASE NOTE! If a Staff member has been invited but they have not yet been added to a group or an individual's profile, they will be unable to access the platform until they have been assigned to one.

Putting It All Together

You can add staff, tracking profiles, or groups in any order you like. Just make sure you associate profiles and staff together within a group in order to give staff members the proper access they require to track data for the correct individuals. Once all of your staff members and tracking profiles are configured, you simply check the boxes of each individual within a Group that should be associated together.

- From the **Manage Profiles** page, you can add profiles to Groups.
- From the **Manage Team** page, you can select Staff members and add them to Groups, or select Guests and add them to profiles.
- From the **Manage Groups** page, you can associate staff members with the profiles they should have access to.