***Personnel***

NCAtrak On-line Help

Click a link or scroll down to locate the information you need.

[Description](mhtml:file://C:\Documents%20and%20Settings\TPrice\Desktop\NCAtrak%20online%20training\agenc.personn\ncatrakot%20Personnel%20Tab.mht!https://www.ncatrak.org/help/Admin_Personnel.htm#_Description_of_the)

[Filter Table to Show Personnel from a Specific Agency](mhtml:file://C:\Documents%20and%20Settings\TPrice\Desktop\NCAtrak%20online%20training\agenc.personn\ncatrakot%20Personnel%20Tab.mht!https://www.ncatrak.org/help/Admin_Personnel.htm#_Filter_Table_to)

[Display Removed Agency Personnel](mhtml:file://C:\Documents%20and%20Settings\TPrice\Desktop\NCAtrak%20online%20training\agenc.personn\ncatrakot%20Personnel%20Tab.mht!https://www.ncatrak.org/help/Admin_Personnel.htm#_Display_Removed_Agency)

[Add a New Person](mhtml:file://C:\Documents%20and%20Settings\TPrice\Desktop\NCAtrak%20online%20training\agenc.personn\ncatrakot%20Personnel%20Tab.mht!https://www.ncatrak.org/help/Admin_Personnel.htm#_Add_a_New)

[Edit a Person’s Information](mhtml:file://C:\Documents%20and%20Settings\TPrice\Desktop\NCAtrak%20online%20training\agenc.personn\ncatrakot%20Personnel%20Tab.mht!https://www.ncatrak.org/help/Admin_Personnel.htm#_Edit_a_Person’s)

[Remove/Delete a Person from the Pick Lists](mhtml:file://C:\Documents%20and%20Settings\TPrice\Desktop\NCAtrak%20online%20training\agenc.personn\ncatrakot%20Personnel%20Tab.mht!https://www.ncatrak.org/help/Admin_Personnel.htm#_Remove/Delete_a_Person)

[Authorize a User Account](mhtml:file://C:\Documents%20and%20Settings\TPrice\Desktop\NCAtrak%20online%20training\agenc.personn\ncatrakot%20Personnel%20Tab.mht!https://www.ncatrak.org/help/Admin_Personnel.htm#_Authorize_a_User)

[Unlock a User Account](mhtml:file://C:\Documents%20and%20Settings\TPrice\Desktop\NCAtrak%20online%20training\agenc.personn\ncatrakot%20Personnel%20Tab.mht!https://www.ncatrak.org/help/Admin_Personnel.htm#_Unlock_a_User)

[Disable a User Account](mhtml:file://C:\Documents%20and%20Settings\TPrice\Desktop\NCAtrak%20online%20training\agenc.personn\ncatrakot%20Personnel%20Tab.mht!https://www.ncatrak.org/help/Admin_Personnel.htm#_Disable_a_User)

[Help with NCAtrak Menu, Header, & Footer](mhtml:file://C:\Documents%20and%20Settings\TPrice\Desktop\NCAtrak%20online%20training\agenc.personn\ncatrakot%20Personnel%20Tab.mht!https://www.ncatrak.org/Training/MenuHeaderFooter.htm)

**Description**

The Personnel page provides CACs with the ability to maintain a list of personnel that provide services to children, and/or refer children for services. These names are displayed in every ‘Person’ pick list in the system, and are maintained separately from people directly related to a case, (mothers, siblings, alleged victims/clients and offenders).

This page also provides CACs with the ability to authorize and manage user accounts. Some people listed in the Personnel Page will have NCAtrak user accounts and others will not. This is at the discretion of your CAC’ Security Officer for NCAtrak.

**Filter Table to Show Personnel from a Specific Agency**

You can change the list to display only personnel associated with a particular agency. Select the agency from the Agency Filter pick list. This list includes all of the Agencies you have entered in the Agencies Page.

**Display Removed Agency Personnel**

This is a list of personnel previously entering into NCAtrak that have the ‘Remove’ checkbox checked.

**Add New Personnel**

1. Click on the ‘Add Personnel’ button.
2. The data entry section will display.
3. Fill in the information. The first name, last name, and agency are required for the record to be saved. They are not used in the NCA statistics report even though they are Red data fields. Other fields are optional.
4. See the table below for a description of the data fields and how to use them.
5. If you this person is NOT going to have a user account - Click ‘Save’ to add the person.
6. If you do want them to be a user, continue on with “To Authorize a User Account” below.

**Edit Personnel Information**

1. Locate the person you wish to edit in the personnel table.
2. Click ‘Edit’ in the action column on that person’s row.
3. Change the information as needed.
4. If the user does not have a User Account, one can be added as described above.
5. Click ‘Save’ to save your changes and return to the list of Personnel.

**Remove/Delete Personnel from the Pick Lists**

You cannot delete a person from the system, since their name may be associated with past cases. However, you can remove a person from the Pick Lists, as described below.

1. Locate the person you wish to remove in the personnel table.
2. Click ‘Edit’ in the action column on that person’s row.
3. Check the ‘Remove from Pick Lists’ box. If the person has a user account, it will be disabled as a result of checking this box. This person will not be able to logon.
4. Click ‘Save’ to save the change and return to the list of Personnel.

**Authorize a User Account**

1. If you are not already in the process of entering the person’s information, locate the person you wish to authorize as a user in the personnel table. Click ‘Edit’ in the action column on that person’s row. (For more details about any data field used in this process check the table below.)
2. Check the ‘Authorize User Account’ box. Additional boxes are displayed to allow you to select the appropriate user role(s) and enter the User Account Information.
3. Assign a Role - Each person who has permission to access NCAtrak must be assigned at least 1 role. A role defines what the person is authorized to see and do in the system. Be sure you know about the Role(s) you are assigning and the privileges that will be granted to the user. You can select more than one role for a User. They will have the highest level of privileges available in the Roles selected for all parts of the system. If you are not sure, click ‘Cancel’ and review the Roles in the ‘Roles’ page.

a.       Click on the desired Role in the Available table.

b.      Click ‘Add’ button to assign the Role to this user.

c.       Repeat if another Role is needed.

1. Assign a User Name – The system will automatically create a user name from the person’s last name and first initial. When you save this information, the system will check to see if the user name is already used by any other NCAtrak user. If it is already assigned to another user, you will get a message. Simply type a different user name and try to save again. You can use any user name you want as long as no other user has already used it.
2. Assign a Temporary Password – There are two text boxes for the password. Create a temporary password for the user that will be used only the first time they login. Enter the password in both textboxes.

a.       A temporary password should be 8-16 characters

b.      with at least one lower case and one upper case letter,

c.       and at least one number or symbol.

1. Click ‘Save.’

**Unlock a User Account**

1. Locate the person you wish to edit in the personnel table.
2. Click ‘Edit’ in the action column on that person’s row.
3. Look at the ‘Account Disabled’ checkbox. If it is checked, uncheck it to enable the account.
4. Enter a new temporary password for the user. The password must be entered in both password fields.
5. Click ‘Save.’ Give the user the new password and have them log into NCAtrak. They will be prompted to enter their own password after they enter the temporary password and click ‘Login’

**Disable a User Account**

1. In the personnel table, locate the person whose account you would like to disable.
2. Click ‘Edit’ in the ‘Action’ column in that person’s row.
3. Clear (uncheck) the ‘Authorize User Account’ box. The ‘Assigned User Roles’ and ‘User Account Information’ will no longer display on the screen.
4. Click ‘Save’ to save the change and return to the list of personnel. The person will no longer be able to login to NCAtrak, but will remain on pick lists.
5. Alternatively, click ‘Cancel’ to cancel the change and return to the list of personnel.

| **Personnel Page** | | |
| --- | --- | --- |
| **Section** | **Name** | **Information about using the field** |
| **Personnel Information** | First Name, Last Name | Enter the name of the person the way you want it to appear in the database. |
| Preface | This is the designation that you want to appear at the front of a person’s name, for example, ‘Dr.’ for a doctor. |
| Credentials | This is a designation that you want to appear at the end of the person’s name, for example, ‘LCSW’ for Licensed Clinical Social Worker. |
| Phone Number | Enter 7 or 10 consecutive numbers and the system will format the number for you like: (xxx) xxx-xxxx. If you need to include an extension, enter an “x” immediately after the last number and it will display like: (###) ###-####x####. |
| Email | Add the email to see it as part of the contact information available in the case record. |
| Agency | Select the agency that this person works for from the pick list. If the agency is not listed here, go to the Agency Page and enter it there. |
| Blind Forensic Interviewer | If your policy is to limit the Forensic Interviewer’s access to the case information until after the interview has been conducted, and the person you are entering conducts Forensic Interviews, check this box. This works with the CAC/MDT Set-up Page **“**Restrict Forensic Interviewer Case Access” check box to limit access to data about the allegation until the Forensic Interview is completed. |
| Authorize a User Account | If this person is someone you want to have a user name and password, click this check box. Additional fields will display. |
| Remove from Pick Lists | Check this box in the event that this person terminates their services as a person working with CAC cases. When you do, their name will no longer display in the personnel pick lists throughout the system, and if they have a user account, it will be disabled. |
| **Assigned User Roles** | Roles | Available - This list displays all of the roles that have been created by your CAC. |
| Selected - This list displays the roles that you have assigned to this person.  To assign a role,           Click on the role name in the ‘Available’ list           Click the ‘Add’ button           The role name will appear in the ‘Selected’ list.  To remove a role,           Click on the role name in the ‘Selected’ list           Click the ‘Remove’ button           The role name will display in the ‘Available’ list |
| **User Account Information** | Username |          The Username will automatically display the last name and first initial of the person you are entering. This can be used for the Username if it is not already in use by another NCAtrak user, (including people not at your CAC). NCAtrak will not allow duplicate Usernames even from different CACs.           You can alter the username or create a new one by typing over the username in the text field. |
| Change Password on Next Login | NCAtrak requires users to create their own passwords. The one you create for them is considered a temporary password – good only for the first login. The user will be prompted to create a new one at the time they first log in with the temporary password. This checkbox will be automatically checked when you are first creating the user account. It will also automatically check if you are assisting a user with a password and you change their password for them. |
| Password |       A password must be at least 8 to 16 characters, at least one upper and one lower case letter, and at least 1 special character or number. It cannot contain the user name, and cannot be the same as any of the past ten passwords used by this user.        You will need to enter it twice. The second entry is to verify the password that you want. |
| Account Disabled | This checkbox is automatically checked after the third unsuccessful attempt of a person using this Username but an incorrect password. This checkbox can also be checked by the Security Officer to disable a person’s account for a temporary or permanent timeframe. |
| Last Password Change Date | Displays the date of the most recent change to this person’s password. Users can change their own password at any time by going to ‘About Me’ in the NCAtrak Menu. |
| Failed Login Attempts | This will automatically count the number of times that someone has used this person’s Username and an incorrect password to login – up to 3 times – then their account is locked and they cannot access the system without contacting the Security Officer or designee at your CAC. If a security officer is locked out, contact the NCAtrak Help Desk. |