

## ADDING USERS TO ACOTE ONLINE

Instructions for adding a new user in ACOTE Online (<https://acota.aota.org>)

### USERS TAB

1. New personnel **may be added** by clicking on the “USERS” tab and scrolling down to “Add User”.\*
2. Add the requested information for the individual (including a new password of your choice).
3. The individual should be given a role of “Application User” unless they will be assigned one of the following roles. In that case, they should be assigned as “Program Official”.
4. Program Officials include the following:
  - CEO
  - Dean or Administrator (to whom the program director reports)
  - Program Director
  - OTD Capstone Coordinator (OTD programs only)
  - Academic Fieldwork Coordinator
  - Student Occupational Therapy Association Advisor

Check the “Permissions” boxes for any parts of the program you need that individual to access. For example,

Candidacy Access: Allows access to the Candidacy tab

Self Study Access: Allows access to the Self Study tab

Interim Report Access: Allows access to the Interim Report tab

Add Program Users: Allows access to the Users tab and they may add anyone to the system.

Add Fieldwork Site: Allows access to the fieldwork tab to add/edit fieldwork sites.

Add Faculty: Allows access to the Faculty tab and they may add/edit Faculty Profiles.

Add Curriculum Data: Allows access to the Curriculum tab where they may add, edit, or delete courses.

### OFFICIALS TAB

If the new user is filling one of the above roles, click on the OFFICIALS tab, click on “Assign Official” to the right of the role to be filled, select that individual’s name from the dropdown menu, and hit “Save”. Once added, click the “Edit” button to the right of that individual’s name to add their credentials, address, and title.

**To remove an official**, click on the “Edit” button to the right of their name in the “OFFICIALS” tab, then click “Replace Official”. Once accreditation staff approve that change, you may designate another program official in that role. Once the new Official is added, click on the “Edit” button to add their credentials, official title, and mailing address.

Changes to program officials should also **be reported** by using the designated Program Data Forms available in the [Accreditation Surveys, Forms, and Templates](#) section of the ACOTE webpage.

***\*IMPORTANT NOTE:** If you attempt to add a new user and receive an error message that a user already exists in the system, please email the name and email address of the individual you are attempting to add to [accred@aota.org](mailto:accred@aota.org) and ask that they be added to your program as a “dual user”.*