ADDING USERS/CHANGING INFORMATION IN THE ACOTE E-ACCREDITATION PORTAL

Below are Instructions for adding a new user or making changes to information in the ACOTE eAccreditation Portal (https://acota.aota.org):

ADDING A NEW USER
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.

*ERROR MESSAGE: 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 and ask that they be added to your program as a "dual user".

ADDING/CHANGING AN OFFICIAL (those listed in #4 above)
To remove an official, click on the "Edit" button to the right of their name in the "OFFICIALS" tab, scroll down and click "Replace Official", then "OK". 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.

To add a new official, 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.
NOTE: if the individual's name does not appear in the dropdown menu, you must first add them to the USERS tab.

Changes to program officials should also be reported by using the designated "Personnel Change Forms" available in the Forms section of the ACOTE webpage (www.acoteonline.org). Forms should be returned to accred@aota.org.

PHONE NUMBER CHANGES

Phone number for an individual: To change the phone number for an existing user, click on that individual's name in the USERS tab, change the phone number, and save.

Phone number for the program (for public contact): To change the phone number of the program, click on the PROFILE tab, scroll down to "Program Inquiry Phone #", add the new program phone number, and click "Save". Once accreditation staff approve that change, it will be recorded in the ACOTE Schools Database and added to program's listing in the School Directory on the ACOTE website (www.acoteonline.org).

EMAIL ADDRESS CHANGES

Email address for an individual: To change the email address for an existing user, click on that individual's name in the USERS tab, change the email under "Email" and "Confirm Email", and save. Note that the individual will need to use the new email address as their new Username to log in.

Email address for the program (for public contact): To change the email address of the program, click on the PROFILE tab, scroll down to "Program E-Mail Address", add the new program email address, and click "Save". Once accreditation staff approve that change, it will be recorded in the ACOTE Schools Database and added to the program's listing in the School Directory on the ACOTE website (www.acoteonline.org).

PROGRAM WEBSITE CHANGEs

Program website changes (for public contact): To change the website of the program, click on the PROFILE tab, scroll down to "Website", add the new program website, and click "Save". Once accreditation staff approve that change, it will be recorded in the ACOTE Schools Database and added to the program's listing in the School Directory on the ACOTE website (www.acoteonline.org).