# How to Create a New Staff Member

Connect·a·Voice

# Creating a Staff Member (DSP)

Service categories

Staff assignments

**Staff members**

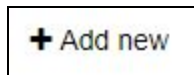Teams

Team Leaders
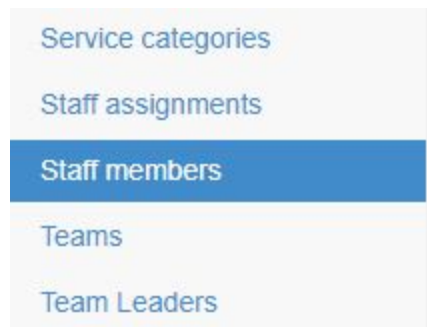
To create a staff member, simply log into the Connect a Voice admin portal and go to the Staff Members section in the left-hand sidebar under "Administration".

Once you are in the Staff Members section, you can click on the "Add New" button

**+ Add new**

If you need to edit an existing staff member, you can search for them in the search bar, and click the pencil icon to edit ✏ or the information icon if you just want to view their information. ⓘ

To add a new staff member, you will need the following information:

- First Name
- Last Name
- Middle Name (optional)
- Phone Number (optional)
- Employee # - required if you plan to import billing records
- Email - will be used as their login username
- Team - usually just the name of the Provider

IMPORTANT:

- Once you enter in a Staff's information and click Save, an email will be sent to them with information on how to create their password and a link to download the mobile app.

# Creating Staff Assignments

Once you setup a staff member, they will not be able to begin working until they are assigned to the proper consumers.

You can create this assignment by navigating to the Staff Assignments section in the left-hand panel.

Services

Service categories

**Staff assignments**

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Teams

Once in the Staff Assignments section, you can click the "Add New" button at the top, select the Staff Member you want to assign from the dropdown, and then select the new Consumer. You can also type into the search bar to easily search for either person's name.

Once both the Staff and Consumer are selected, click "Save" or "Save and add another." Once this is complete, the Staff Member will be allowed to find the new Consumer in their Connect a Voice mobile app.
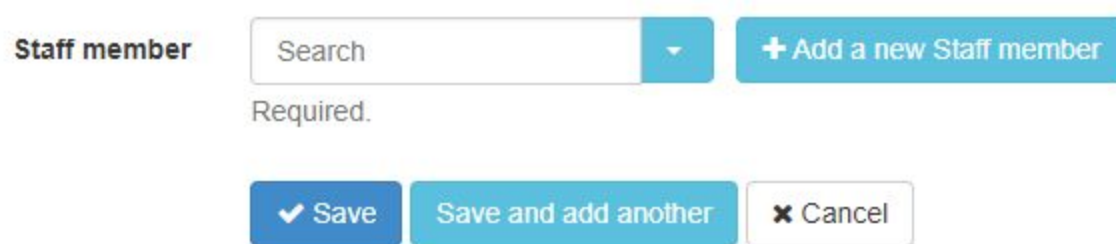
**Staff member**     Search     ▾

Required.

**Consumer**     Search     ▾

Required.

✔ Save     Save and add another     ✖ Cancel

# Creating a New Team Leader

If you would like to allow a new person to access the Admin Portal, simply create them as a staff member by following the directions above.

Once they are created, navigate to the "Team Leaders" section in the left-hand sidebar. Once there, click the "Add New."

Once there, you can simply find the user's name from the list and click "Save"



IMPORTANT: If a Team Leader would like to login as both a Team Leader and a Staff Member (DSP) then they will need to have two separate emails for both accounts.