



Requesting Welligent User Roles for Independent Charter Schools

Purpose

The purpose of this job aid is to provide guidance to independent charter schools on how to request and manage Welligent user roles and track their processing status, via the **oneAccess** website.

WHY MUST I DO THIS?

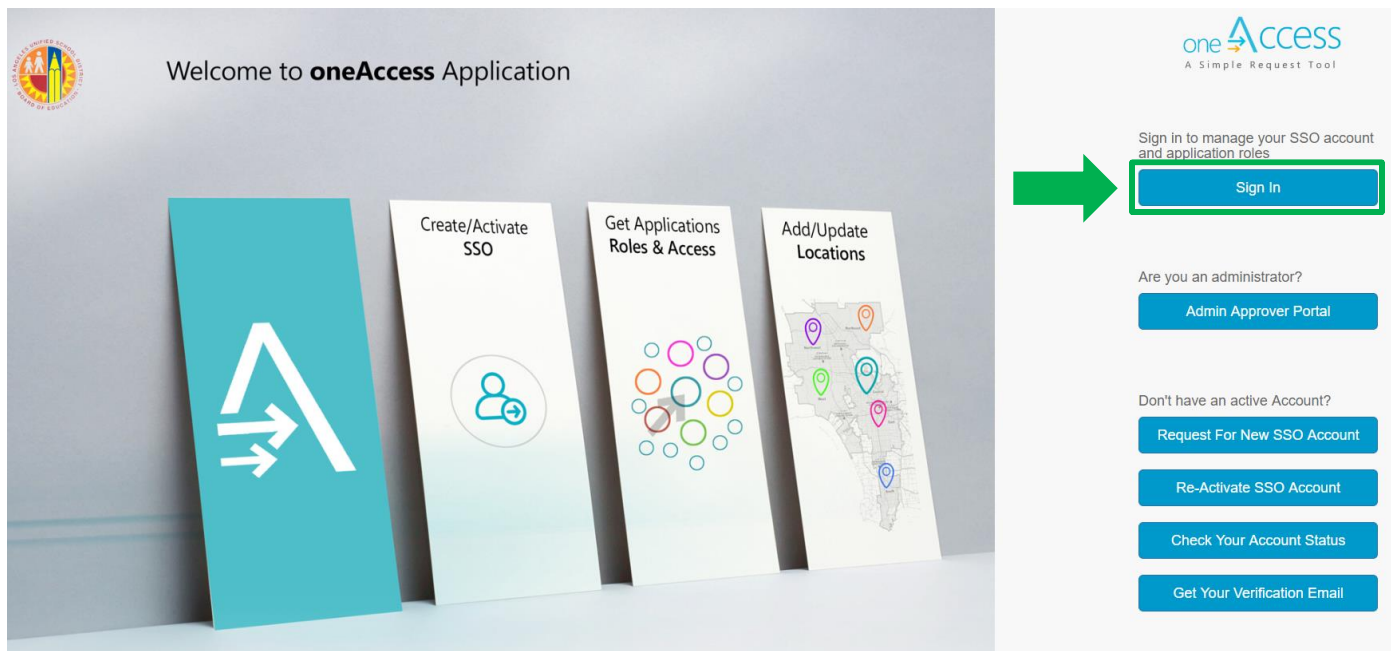
Beginning in the 2019-20 school year, **oneAccess** replaced EZAccess for user management of Welligent accounts. Key features include tracking role request status, administrator review of currently assigned Welligent roles, and the ability to revoke approved roles.

BEFORE YOU GET STARTED

- You must have an active LAUSD Single Sign-On (SSO) account prior to applying for a Welligent role in **oneAccess**. Please activate and/or update your SSO profile prior to using the platform.
- The LAUSD recommended browser is Google Chrome

LOG IN

1. Access **oneAccess** at <https://oneaccess.lausd.net> and click **Sign In**.
2. Log in using your **Single Sign-On (SSO)** credentials.

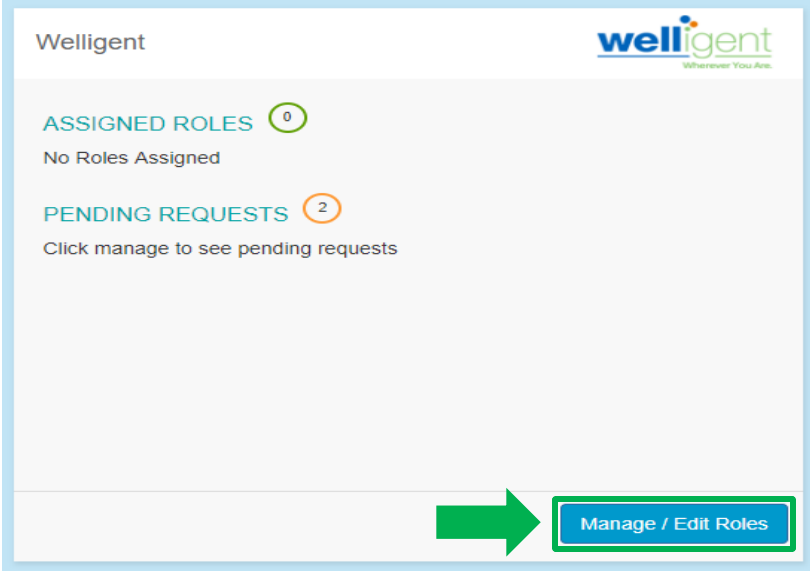




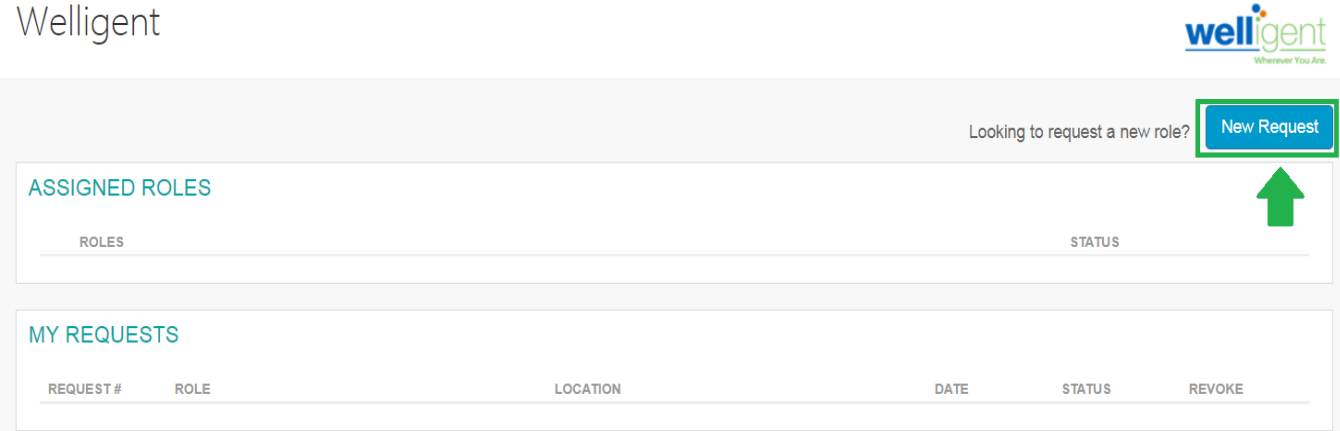
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Choose Welligent Tile

On Welligent Tile click **Manage/Edit User Roles**



Click **New Request**





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Building the Welligent Role/School Request

- Step 1** Select **Location Type**. In this example, **Charter** was selected.
- Step 2** Select **Role**. See page 6 for a description of charter Welligent roles. In this example, **Charter-Special Educ Lead** was selected.
- Step 3** Select **Locations**. In this example, **Aspire Gateway AC (1216201)** was selected. You can also enter your location code to pull up your site.
- Step 4** Select **Supervisor** who will supervise your Welligent use.
- Step 5** Select **Welligent Request Type**. In this example, **New Welligent Account** was selected.
- Step 6** Click **Done Editing**

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Role Request Builder

SELECT LOCATION TYPE **Step 1** SELECT ROLE **Step 2**

Charter Charter - Special Educ Lead

SELECT LOCATIONS

ASPIRE GATEWAY AC (1216201) x **Step 3**

SELECT SUPERVISOR **Step 4** SELECT WELLIGENT REQUEST TYPE **Step 5**

Thomas, Vivek New Welligent Account

Step 6 Done Editing Cancel

If Applicable, Add Additional School Sites

To select more school sites, click on the **+Add Role** button and repeat steps **1-6** above.

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Role Request Builder

| LOCATION TYPE | ROLES | LOCATIONS |
|---------------|-----------------------------|-----------------------------|
| Charter | Charter - Special Educ Lead | ASPIRE GATEWAY AC (1216201) |

+ Add Role ←



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A completed sample is shown below:

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Role Request Builder

| LOCATION TYPE | ROLES | LOCATIONS | | |
|---------------|-----------------------------|-----------------------------|--|--|
| Charter | Charter - Special Educ Lead | ASPIRE GATEWAY AC (1216201) | | |
| Charter | Charter - Special Educ Lead | ASPIRE INSKEEP AC (1225501) | | |

[+ Add Role](#)

Submitting Welligent Role/School Access

Step 7 Select the **check box** agreeing to the **Terms and Conditions**. Click the hyperlink to display the **Terms and Conditions**. Click the **Submit Request** button to complete the role request.

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Role Request Builder

| LOCATION TYPE | ROLES | LOCATIONS | | |
|---------------|-----------------------------|-----------------------------|--|--|
| Charter | Charter - Special Educ Lead | ASPIRE GATEWAY AC (1216201) | | |
| Charter | Charter - Special Educ Lead | ASPIRE INSKEEP AC (1225501) | | |

[+ Add Role](#)

I have read and agree to the [Terms and Conditions](#).



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The processing status of the request will display in the **Status** column. A description of each status is shown below:

| Request Status | Description |
|-------------------------|---|
| Submitted | User has submitted role request, pending administrator approval |
| Approved | Administrator has approved user role request |
| Cancelled | Approved role has been successfully revoked |
| Cancel Requested | The system is currently processing a request to revoke a user role |
| Expired | The role has expired based upon the expiration date of the role request, which is calculated on a role-to-role basis |
| Rejected | An approver has rejected a user's role request or the request has aged out of the system waiting in an approver's queue |

If there are issues with the role the status will display, and the user will get a message with instructions of what to do to resolve the issue.

| MY REQUESTS | | | | | | |
|-------------|------------------------------|--|-----------|---|--------|--|
| REQUEST # | ROLE | LOCATION | DATE | STATUS | REVOKE | |
| BECAC4A4 | DIS - LAS (Per Diem) | ABINGTON SPCH PATH (1190701) | 4/3/2019 | Approved WARNING | | |
| 8444C0CE | NPS - Special Education Asst | AL-MADINAH SCHOOL (1186501) | 4/3/2019 | Approved WARNING | | |
| 16EBDC0F | Charter - Nursing Provider | ASPIRE INKEEP AC (1225501) | 4/3/2019 | Approved ERROR 7: Contact Welligent Support at 213-241-5200 Option 4 | | |
| 48476969 | NPA - Administrator | ALPINE ACADEMY (1911201) | 3/21/2019 | ERROR | | |
| 7F5E9571 | NPA - Administrator | ALMANSOR EDUCATION CENTER (1911101) | 3/20/2019 | Approved ERROR | | |
| B6929BFB | NPA - Other | 360 DEGREE CUSTOMER INC. -LAS PER DIEM (1782501) | 3/20/2019 | Rejected | | |
| AA8A07C | Charter - Nursing Provider | ASPIRE FIRESTN ACAD (1216101) | 3/20/2019 | Approved ERROR | | |
| 8B669511 | NPS - Special Education Asst | ALL SAINTS SCHOOL (1960101) | 3/6/2019 | Approved PROCESSED | | |
| 2F3690B4 | NPS - School Administrator | AJ HESCHEL DAY SCH (1177901) | 3/6/2019 | Approved PROCESSED | | |
| B8AD5DED | Charter DIS - OT | ACADEMIA MODERNA (1215601) | 3/6/2019 | Approved ERROR | | |

Once a role is approved, the user will see the status **Approved** and will be able to log into Welligent.



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Revoking Welligent Role/School Access

In this section users will also be able to see the **Revoke** Column. This revoke button effectively removes the role from the user profile and s/he will no longer have the role in Welligent.

MY REQUESTS

| REQUEST # | ROLE | LOCATION | DATE | STATUS | REVOKE |
|-----------|-----------------------------|-----------------------------|----------|-----------|--------|
| D4DE823E | Charter - Special Educ Lead | ASPIRE INSKEEP AC (1225501) | 4/4/2019 | Approved | |
| 74138B0 | Charter - Special Educ Lead | ASPIRE GATEWAY AC (1216201) | 4/4/2019 | Submitted | |

Welligent Role Name and Description for Charter School Users

The table below represents roles that charter schools may select. The role names were designed with the end-user in mind and should mirror the high-level function of the charter school staff. If you have questions on which role to select, please reach out to the Charter Operated Programs team at CharterOperatedPrograms@lausd.net. Note: If a charter school employee is a non-public agency based staff (i.e., CTA, TES, etc.), ensure the proper selection of role which ends in "agency".

| Welligent Role Name | Examples of Charter School Staff Users | Description | Report Access |
|---|--|--|--|
| Charter – Special Education Lead | <ul style="list-style-type: none"> ▪ School Director ▪ Principal ▪ Assistant Principal ▪ Special Education Director, Coordinator, Lead ▪ Special Education Administrator ▪ Lead Special Educator ▪ Caseload Manager ▪ Admin Designee ▪ Clerk/Office Assistant | Access to all administrative privileges, including the ability to lock IEPs and generate administrative reports. Also, this role has the ability to service provide and can assign service caseloads to other providers at site. In addition, has read/write access to all services. | <ul style="list-style-type: none"> ▪ Administration Reports ▪ Global Management Reports ▪ IEP Timeline Reports ▪ School Administrator Reports ▪ Health Reports ▪ Section 504 Reports ▪ Global Reports ▪ Provider Service Reports |
| Charter – Special Education Lead (Agency) | Agency provided: <ul style="list-style-type: none"> ▪ Special Education Director, Coordinator, Lead ▪ Special Education Administrator ▪ Lead Special Educator ▪ Caseload Manager ▪ Admin Designee ▪ Clerk/Office Assistant | Access to all administrative privileges, including the ability to lock IEPs and generate administrative reports. Also, this role has the ability to service provide and can assign service caseloads to other providers at site. In addition, has read/write access to all services. | <ul style="list-style-type: none"> ▪ Administration Reports ▪ Global Management Reports ▪ IEP Timeline Reports ▪ School Administrator Reports ▪ Health Reports ▪ Section 504 Reports ▪ Global Reports ▪ Provider Service Reports |



Requesting Welligent User Roles for Independent Charter Schools

| Welligent Role Name | Examples of Charter School Staff Users | Description | Report Access |
|---|---|---|---|
| Charter – Psychologist – Counseling Provider | <ul style="list-style-type: none"> Licensed/Credentialed Psychologist Any Designated Instructional Service (DIS) Role Designated for School Mental Health or Pupil Counseling | Service provider role with read/write access to track Pupil Counseling, Behavior Intervention Development (BID), Behavior Intervention Implementation (BII) and Educationally Related Mental Health Counseling (ERICs) services. In addition, provider has access to assessment module. | <ul style="list-style-type: none"> IEP Timeline Reports Section 504 Reports Provider Reports |
| Charter – Psychologist – Counseling Provider (Agency) | <p>Agency provided:</p> <ul style="list-style-type: none"> Licensed/Credentialed Psychologist Any Designated Instructional Service (DIS) Role Designated for School Mental Health or Pupil Counseling | Service provider role with read/write access to track Pupil Counseling, Behavior Intervention Development (BID), Behavior Intervention Implementation (BII) and Educationally Related Mental Health Counseling (ERICs) services. In addition, provider has access to assessment module. | <ul style="list-style-type: none"> IEP Timeline Reports Section 504 Reports Provider Reports |
| Charter – Service Provider | <ul style="list-style-type: none"> Special Education Teacher (non-lead role) Any Designated Instructional Service (DIS) Role (i.e., OT, PT, Speech, etc.) Except for Counseling | Service provider role with read/write access to track various DIS services. In addition, a typical special education, non-manager role, would fall under this category. | <ul style="list-style-type: none"> IEP Timeline Reports Provider Reports |
| Charter – Service Provider (Agency) | <p>Agency provided:</p> <ul style="list-style-type: none"> Special Education Teacher (non-lead role) Any Designated Instructional Service (DIS) Role (i.e., OT, PT, Speech, etc.) Except for Counseling | Service provider role with read/write access to track various DIS services. In addition, a typical special education, non-manager role, would fall under this category. | <ul style="list-style-type: none"> IEP Timeline Reports Provider Reports |
| Charter – Nursing Provider | <ul style="list-style-type: none"> Licensed/Credentialed Provider | Provider access to health modules and information in Welligent. | <ul style="list-style-type: none"> IEP Timeline Reports Health Reports Section 504 Reports |
| Charter – Nursing Provider (Agency) | <p>Agency provided:</p> <ul style="list-style-type: none"> Licensed/Credentialed Provider | Provider access to health modules and information in Welligent. | <ul style="list-style-type: none"> IEP Timeline Reports Health Reports Section 504 Reports |