# Who Can Access What?

An Explanation of Role-Based Access to Password-Protected Content at www.shiptacenter.org

# SHIP User Roles and **Menu Access** -

Graduated Access from lowest (1) to highest (5):

**1. Counselor in Training**
- Can **only** access Counselor Training menu
- This menu is the portal to our Online Courses and Certification Tool (OCCT)

**2. SHIP Counselor**
- Features, Counselor Training, Medicare and Other Insurance, Calendar, Resource Library

**3. SHIP Staff**
- Everything above, plus SHIP Profiles and most of SHIP Operations

**4. SHIP Administrator**
- Everything above + SHIP Program Management (subtopic of SHIP Operations)
- Has Dashboard and My Users admin functions
- This role can only be created by SHIP Directors

**5. SHIP Director**
- Access to all menu items and functions
- This role can **only** be created by the SHIP Center

# SHIP User Roles and the **Resource Library -**
Graduated Access from lowest (2) to highest (5):

## 1. Counselor in Training
- Cannot access Resource Library

## 2. SHIP Counselor
- Can search
- Can only see resources coded for counselors
- Cannot upload

## 3. SHIP Staff
- Can search
- Can only see resources coded for staff and counselors
- Can upload (but uploads require approval to go live)

## 4. SHIP Administrator
- Can search and upload
- Can only see resources coded for administrators, staff, and counselors
- Can approve staff uploads on dashboard

## 5. SHIP Director
- Can search and upload
- Can see all resources
- Can approve staff uploads on dashboard

# SHIP User Roles and the **Online Courses and Certification Tool (OCCT)**

### 1. Counselor in Training
- Can take tests *(are "Participants" in the OCCT)*
- Can access all courses

### 2. SHIP Counselor
- Can take tests *("Participant" in the OCCT)*
- Can access all courses

### 3. SHIP Staff
- Can take tests *("Participant" in the OCCT)*
- OR, upon SHIP director or SHIP administrator request, can be *manually* promoted to administer tests in OCCT
- Can access all courses

### 4. SHIP Administrator
- Can administer tests
- Can access all courses
- Can access the question bank answers in the library

### 5. SHIP Director
- Can administer tests
- Can access all courses
- Can access the question bank answers in the library

# SHIP User Roles and the **Features Menu** -

Graduated Access from lowest (2) to highest (5):

| 1. Counselor in Training | • Cannot access Features menu |
| 2. SHIP Counselor | • See 8 most recent Features coded for counselors |
| 3. SHIP Staff | • See 8 most recent Features coded for staff and counselors |
| 4. SHIP Administrator | • See 8 most recent Features coded for administrators, staff, and counselors<br>• See yellow circle indicator for Dashboard alerts |
| 5. SHIP Director | • See *all* Features (*the most recent 8 are displayed*)<br>• See yellow circle indicator for Dashboard alerts |

# SHIP User Roles and the **Online Calendar -**
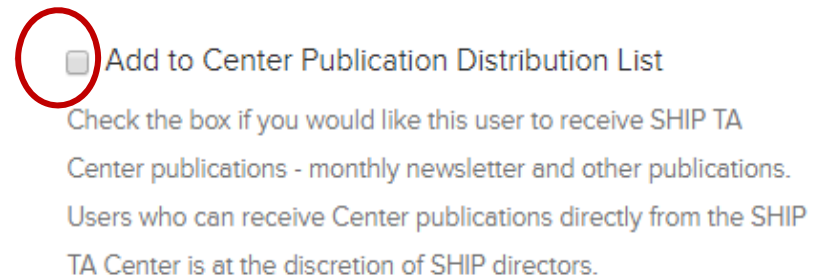Graduated Access from lowest (2) to highest (5):

**1. Counselor in Training** ~~(crossed out)~~
- Cannot access calendar

**2. SHIP Counselor**
- See events where counselors are included in the intended audience

**3. SHIP Staff**
- See events where staff and/or counselors are included in the intended audience

**4. SHIP Administrator**
- Can see all events except for those where SHIP directors are the only intended audience

**5. SHIP Director**
- Can see all Events

# Center Publications - FAQs

- Q: What publications will people in my state receive if I check this box when I approve or add a new user?

  - A: If checked, the user will receive SHIP Watch, our bi-monthly newsletter. (No other publications are currently being sent to this distribution list.)

- Who should get SHIP Watch?

  - A: That is your decision, but you can review our newsletter scope and previous editions here: **https://www.shiptacenter.org/center-services/ship-watch-newsletter/**

☐ Add to Center Publication Distribution List

Check the box if you would like this user to receive SHIP TA Center publications - monthly newsletter and other publications. Users who can receive Center publications directly from the SHIP TA Center is at the discretion of SHIP directors.

Create And Approve User

# Resource Library Roles - FAQs

- Who can see the Medicare Minutes?
  - Staff and higher
- Who can see the PowerPoints for webinars?
  - It is based upon the intended audience, as advertised on the Center's emailed calendar.
    - Yellow = Director only
    - Blue = Staff and higher
    - Green and Gray = Counselors and higher
- Who can see the materials uploaded by SHIPs?
  - Each SHIP contributor decides when uploading

# Online Calendar Roles - FAQs

- Can my staff and counselors see every event and register for it?
  - Users only see events coded for their role
- How do I know what users can see an event?



Calendar of Events. All events are shown in Eastern Time.

  - The intended audience is identified in the event description and the Center has set the role access accordingly
  - Like in the Resource Library, users can see events for their role and lower.

# Questions?

□ **Managing your users:**
- Contact SHIP Center Program Manager, Jeanne Mentel:
- Email: jmentel@shiptacenter.org or jmentel@nei3a.org
- Phone: 319-874-6848

□ **Using the library, calendar, and OCCT:**
- Contact SHIP Center Communications and Technology Manager, Angela Burk:
- Email: aburk@shiptacenter.org or aburk@nei3a.org
- Phone: 319-874-6878