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HOW TO FIND AN APPLICANT AT YOUR SITE (PARISH OR SCHOOL) AND VERIFY COMPLIANCE:

1. **Quick Search for an Applicant:** easiest way to find a person who affiliated with your site
 - Enter the applicant's last name. If they have completed an application, and are using the same name they used for the application, you will find their account. Click View to see their application; Process to get to Process Application page for the applicant; or Edit to get to their Application Overview page. Workshop date is in final column.
2. **Advanced Application Search:** easiest way to find a person who is currently listed for your site that has a common last name, does not recall which last name may have been used for their application or cannot be found in quick search
 - Enter the information you have. Remember that a first name might be a nickname. Enter only the first 2 letters to see if that provides a broader search. Check the *Extended Search* box on the right for a full search of any names the applicant may have listed.
 - You can also search with email, home phone and/or date of birth info if you have it.
7. **Organization Wide Lookup:** to find any person who has completed an EIM application at any time in the eAppsDB system (assuming you have the correct last name)

- Enter at least 2 letters of the last name. This will give you all persons listed in the database having the name you are looking for. You may need to use additional identifying information (address and other sites) to help determine if this is your member.
- Check for current workshop date (far right column). Workshop date must be within the past 3 years to unarchive/affiliate to your site (for persons listed at other sites).
- Click **Add to My Site** – 2nd to last column on right – to unarchive/affiliate to your site.
 - If the applicant you are searching is listed as “Former Employees and Volunteers” then this account has been archived. Applicant accounts are most typically archived due to no current workshop date in the database – this should be addressed with the applicant before they can continue in ministry; **DO NOT UNARCHIVE UNTIL A CURRENT WORKSHOP DATE IS ENTERED** - if you unarchive an account that doesn’t have a current workshop date recorded, it will be “re-archived” when the next recheck queue is created (roughly every week).
 - Once a current workshop date is recorded, the account can be unarchived – but the applicant must contact their own parish/school to do so.
 - Newly unarchived applicants will often require a background recheck – this is done by the EIM office when the application is unarchived. If there is a restricted status on the applicant, the diocesan EIM Coordinator will address that matter with the pastor or principal.
 - If you still cannot find an applicant, it could mean they completed their application using another name, they started but never completed an application and it has since deleted out from the system or some other unusual circumstance. Contact the EIM Office to assist in these matters.

HOW TO VERIFY EIM COMPLIANCE FOR MEMBERS AT YOUR SITE:

- 10. Compliance Reports** allows you to view the report or create an excel spreadsheet that can be saved and manipulated to provide the specific data needed for your report and is a good report format to share with ministry/organization leaders.
 - Click **Compliance Reports**. Select Compliance Report. Don’t enter a name and do not change Employment type. For Compliance type choose compliant or non-compliant depending on what list you need. You may publish/display the compliance list; however, you must ensure all “Restricted” members are deleted from the public list. You may share the compliant and non-compliant list with ministry/organization leaders to assist with compliance. Use the non-compliant list to capture email addresses to send reminders to those needing a workshop.
- 3. View Default Applicant Report** gives a quick, complete overview of persons affiliated with your site.
- 4. Customize an Applicant Report** can be refined to create a quick report specific to your needs (i.e. a list of just approved or just restricted applicants, a list of those who have their application in process, a view of workshop dates, etc.).

- Check the box or boxes in each category to create the needed report. (To create a list of those who are eligible to serve in ministry based on approved background checks, check BC completed under Workflow and status Approved under Organization. Leave Site Status blank. Sort by name and show name and workshop date – this will allow you to see which of your approved volunteers need a workshop to be eligible to serve in ministry.)

5. Quick Statistics is a multi-function link.

- Total Applications includes all applications in eAppsDB affiliated with your site and is the total of the next 3 numbers (submitted, completed but not submitted and incomplete) Click “view” next to the category to see those applications needing attention and please address these with your members.
 - Notify “incompletes” that they are ineligible to serve in ministry until application submitted.
- Approved/restricted/rejected by organization identifies application status based on background check result, additional application information and/or review by pastor/principal.
- Approved/restricted/rejected by site is used to make site specific notes regarding an applicant or to indicate you have reviewed this applicant and know they are in your system and serving at your site. See How to change the status of an applicant at your site (below).
- Applications that need action – to review site status’ needing attention.
- Box at the bottom (ignore *?Applications For ...* for now) – Parishes should only have a number in the box grid for Other Employee/Parish and Volunteer/Parish. Schools should only have a number in the box grid for Catholic School Educator/School, Other Employee/School and Volunteer/School. Most of these need work and this is our project this year.

HOW TO CHANGE THE STATUS OF AN APPLICANT AT YOUR SITE:

5. Quick Statistics (or **Quick Search** for an individual applicant) to change or review the site status for an applicant.

- In the ‘Applications that need action:’ section, click on “view” next to ‘Awaiting assignment of site status’. A list of all applications needing site status assigned will be the next screen. This screen will indicate the name, address, email, phone, view, process, edit, workflow, organization and site status.
- To change the site status, choose the applicant that you would like to change the site status on, click on the ‘Process’ button by that applicant.
- The next screen is the ‘Process Application’ screen. This section provides you with the following information: name/address/etc., user id/password, workflow & org status history, site status edit access, and links to Make Notes, add Diocese of Austin Workshop Dates, View/Print Application, Work with References and Manage Attributes.
- Assigning a restricted or rejected site status should be reviewed with the EIM office. Note: if an applicant is restricted at the Organization level due to a background check result, it is not necessary to also restrict them at the site level (unassigned status is sufficient). If an applicant is to have a site status assigned, click on ‘edit’ next to ‘Site’.

- At the ‘application status’ screen, click on ‘Edit Status’ to assign your site status. Highlight the status you would like to assign using the drop-down box, add notes if applicable and click the ‘Save’ button. Note: If a restricted or rejected status is given, you need to identify the restriction in the notes field.
 - Site status should be reviewed periodically and updated as needed. Sufficient notation should be made as to how you use the site so that future site admins can understand what your site assignments refer to. Please use site status for restriction information only if you plan to maintain this feature for your membership.
9. **Manage attributes** allows you the option to categorize members of your site in order to view that group’s compliance (i.e. an attribute ‘Boy Scout troop’ would enable you to quickly pull a list of all members of your site affiliated with your scout troop.
- Directions for managing attributes are found when you click this link. This is a multiple part process beginning with the site admin creating attributes for their site, then assigning attributes to applicants and then completing the needed search

ARCHIVE A MEMBER ACCOUNT

14. **Archive by Lookup** is used to archive an individual that you know is no longer serving in ministry at your site.
- Please check your membership regularly. If an applicant is no longer affiliated with your site (he/she is not on any ministry/organization list at your site), check the box next to your site name and update each page as you work on it. If you see applicants due for a workshop within the next few months, let them know to get to a workshop ASAP!
 - Enter last name and check the box next to your site name and update the page. If a person is affiliated with multiple sites, he/she will only be unaffiliated with your site.
 - Leave the name field blank and click “search” and you will get a listing of all your members to do a more extensive “cleaning”. Check the box next to your parish name for those persons you wish to “unaffiliated” from your site. Click update on each page you have checked boxes.
13. **Re-Check Queue** is used by the EIM office to create batches of applicants due for a recheck (3 years since previous check). Applicants in the queue that don’t have a current workshop date will be archived.

HOW TO MANAGE YOUR EIM WORKSHOP

15. **Workshop Class Management:** is the management system for most of what needs to be done regarding an EIM Workshop. Once arrangements are made at the site level to host a workshop, the workshop is posted in eApps by the EIM Office. Applicants login to their EIM account in eApps to pre-register (or they contact their own parish/school site admin to do so for them if they do not have access to the internet); after the workshop, attendance is credited directly to the accounts of those who pre-registered by the workshop host EIM site admin.

REMEMBER – PRE-REGISTRATION, AT LEAST 24 HOURS BEFORE WORKSHOP START TIME, IS REQUIRED!

- That being said, if an attendee shows up (ahead of time) and says they thought they had signed up, etc., and you are able to check to see if they have an account in the database, have them sign in add their name to the Roster so you can give them credit. If someone shows up who doesn't have an account (or you can't verify) and they insist on staying, tell them they might not receive credit for attendance, but don't argue with them if they insist on staying. Direct them to their own parish/school EIM site administrator for assistance.
- **To assist your own members who don't have access to the internet, or have difficulty with login to their own account**, go to Workshop Class Management, click Workshop Signup and View Workshop Dates. Find the workshop your member wishes to attend and click Register (enter name - verify correct applicant) and then 'Register'. They are now added to the Roster.
 - If you can't find someone who says they've done an application, search for them in the database. If you are in their EIM account, you can sign them up at Sign up for a Workshop (bottom right) on the Application Overview page. Contact the EIM Office to assist if needed.
 - If you have a member wanting to attend who is archived, do not unarchive until they have attended a workshop. You can still pre-register them from workshop class management (and they can pre-register themselves if archived from their account).
 - [For your members who aren't in the database, inform them they must complete an EIM application immediately (online or paper) – if the application is submitted at least 24-hours prior to workshop, they can then pre-register and attend the workshop.]
- **Workshop hosts receive additional instructions for using Workshop Class Management** via the Workshop Confirmation and Workshop forms emails sent once workshops are scheduled.

Site administrators can register your members to attend another workshop **BUT**, be courteous! If you have more than 1 or 2 members needing to attend a workshop, that probably means it is time for you to host a workshop! **Do not register anyone from your parish/school to a workshop that is already full, or within 24 hours of the start, unless you first contact the workshop host.**

CHANGE YOUR PASSWORD/CAN'T GET IN YOUR ACCOUNT

- 6. Change your Password** – when your ID/password are first issued and when prompted to that it is about to expire (2 weeks prior to the expiration at 90 days).
 - If you ever can't get into your account for whatever reason, send me an email and I will reset your ID to match your password again, and then you can change your password to what you prefer
 - You can't use the **Forgot User ID or Password?** retrieval on the login page for your admin ID/password.
 - **DO NOT EVER** give your ID/password to anyone and reset your password if you believe someone else may have seen it.

HOW TO HELP AN APPLICANT LOGIN TO THEIR OWN APPLICATION

- A. If a member contacts you that they don't recall their ID/password, send the following message so they can retrieve their ID/password:

Please retrieve your User ID/Password using the **Forgot User ID or Password?** button at eappsdb.com/austin. If you do not receive the email with your ID/password, please check your spam/junk folder.

- B. If their email address has changed, update their email address in their EIM account and send the following message:

Your EIM account has been updated with the email address you used for this message. Please retrieve your User ID/Password using the **Forgot User ID or Password?** button at eappsdb.com/austin. If you do not receive the email with your ID/password, please check your spam/junk folder.

- C. If they need additional assistance to sign up for a workshop or some other task from their account, send the following message:

To check your EIM status or sign up for a workshop, login to your EIM account at eappsdb.com/austin [If you do not recall your User ID/password, click **Forgot User ID or Password?** at bottom of the login page to retrieve your User ID and password. NOTE: you may need to update your email address in your account for retrieval to work - contact your parish/school EIM site administrator or the EIM Office for assistance. Please do not create a duplicate application if you believe you have created an account in the past.]

From your account you can check your most recent workshop date (place cursor over **Workshop Dates**), **Print Compliance Verification** (located under Name/Address), update account information (green checks on right: **Main Application** to update email or street address and phone numbers or **Select Sites** to update parish/school affiliation) and **Sign Up for a Workshop** (bottom right) to see a list of upcoming workshops (attendance is required at least once every 3 years). Click the **Sign Up** button for the workshop you wish to attend.

NOTES: 1) there is now only one EIM Workshop, which replaces the former Basic/Refresher model - when you are next due for a workshop, you will attend the EIM Workshop; and, 2) **Workshop attendees must pre-register at least 24 hours before workshop start time – walk ins are no longer admitted.**