

How do I add new program leaders?

View in Help Scout

(<https://secure.helpscout.net/docs/604e76b7c44f5d025f443d7a/article/604e9e1224ce107ab4d155b8>)

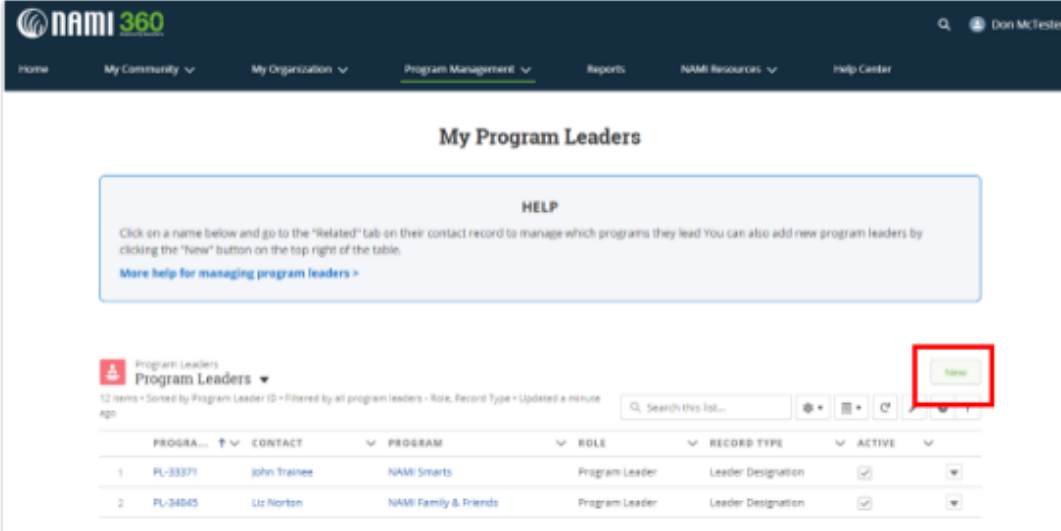
IMPORTANT:

"*Leader Designation*" record types represent a program leader is trained and certified to lead a NAMI program generally. "*Local*" record types represent a program leader is *actively* leading a NAMI program within their local NAMI organization.

A program leader needs both "Leader Designation" and "Local" program leader designations in order to have access to the Extranet.

If the program leader already has a "Leader Designation" program leader designation record type in their account, but does *not* have a "Local" record type program leader designation, please skip to step #6.

1. In your NAMI 360 account, click on the downward arrow next to the **Program Management**. From the drop-down list, click on **Program Leaders**. The screen will display the current program leaders within your NAMI State or Affiliate organization. Click on the **New** button at the top right-hand corner of the program leader list (shown below).



The screenshot shows the NAMI 360 interface. At the top, there is a navigation bar with the NAMI 360 logo and several menu items: Home, My Community, My Organization, Program Management (highlighted), Reports, NAMI Resources, and Help Center. Below the navigation bar, the main heading is "My Program Leaders". A "HELP" box contains instructions on how to manage program leaders. Below the help box, there is a "Program Leaders" section with a "New" button highlighted in a red box. Below the "New" button is a table of program leaders.

PROGRA...	CONTACT	PROGRAM	ROLE	RECORD-TYPE	ACTIVE	
1	PL-33371	John Trainee	NAMI Smarts	Program Leader	Leader Designation	<input checked="" type="checkbox"/>
2	PL-34045	Liz Norton	NAMI Family & Friends	Program Leader	Leader Designation	<input checked="" type="checkbox"/>

2. Select **Leader Designation** as a record type, then click **Next**

New Program Leader

Select a record type

Local
Contact leads a Program for a Local Affiliate. Should be connected to a Local Program.

Leader Designation
Stores qualifications and status for a Contact. Should be connected to a National Program

3. Begin to fill program leader form by typing in the name of the program leader in the ***Contact** box until the name appears in the drop-down, then select the name. In the ***Program** box, start typing in "NAMI" (shown below) and then click **Enter** on your keyboard.

New Program Leader: Leader Designation

Information

Program Leader ID

Record Type
Leader Designation

*Contact

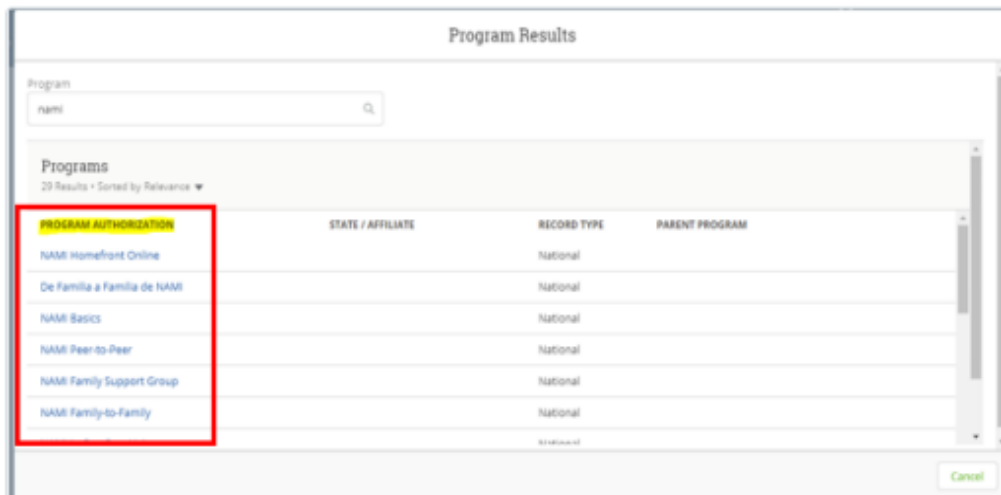
Role

*Program

Master Active

Date of Re-Training

4. After typing in "NAMI" and clicking Enter on your keyboard, a list will appear displaying NAMI programs at a National level. **Please be sure** to click on the correct Program name underneath Program Authorization (shown below).



The screenshot shows a web interface titled "Program Results". At the top, there is a search bar with "NAMI" entered. Below the search bar, it says "Programs" and "29 Results • Sorted by Relevance". A table lists several programs, with the first column, "PROGRAM AUTHORIZATION", highlighted in yellow and enclosed in a red rectangular box. The table has four columns: "PROGRAM AUTHORIZATION", "STATE / AFFILIATE", "RECORD TYPE", and "PARENT PROGRAM".

PROGRAM AUTHORIZATION	STATE / AFFILIATE	RECORD TYPE	PARENT PROGRAM
NAMI Homefront Online		National	
De Familia a Familia de NAMI		National	
NAMI Basics		National	
NAMI Peer-to-Peer		National	
NAMI Family Support Group		National	
NAMI Family-to-Family		National	
		STATEWIDE	

5. After clicking on the program name, it will display in the * **Program** box on the New Program Leader: Leader Designation form. Then, fill in the box under **Role** by clicking on the downward arrow and selecting **Program Leader**. At this time, you do not have to fill out any of the boxes Training Information. The Master Active box should already be checked. To complete, click **Save**.

New Program Leader: Leader Designation

Information

Program Leader ID Record Type
Leader Designation

* Contact Role
Program Leader

* Program

Training Information

Date of Initial Training Date of Re-Training

6. Once you have a leader designation record for a program leader, you can then create a **Local** record for them to associate them to your specific NAMI State or Affiliate organization.

In your NAMI 360 account, click on the downward arrow next to the **Program Management** tab and click on **Program Leaders** from the drop-down list. The screen will display the current program leaders within your NAMI State or Affiliate organization. Click on the **New** button at the top right-hand corner of the program leader list (shown below).

My Program Leaders

HELP

Click on a name below and go to the "Related" tab on their contact record to manage which programs they lead. You can also add new program leaders by clicking the "New" button on the top right of the table.

[More help for managing program leaders >](#)

Program Leaders
Program Leaders ▾

12 rows • Sorted by Program Leader ID • Filtered by all program leaders - Role, Record Type • Updated a minute ago

Search this list...

PROGRAM	CONTACT	PROGRAM	ROLE	RECORD TYPE	ACTIVE	
1	PL-33371	John Traxee	NAMI Smarts	Program Leader	Leader Designation	<input checked="" type="checkbox"/>
2	PL-34045	Liz Norton	NAMI Family & Friends	Program Leader	Leader Designation	<input checked="" type="checkbox"/>

7. Select **Local** as the record type, then click **Next**.

New Program Leader

Select a record type

Local
Contact leads a Program for a Local Affiliate. Should be connected to a Local Program.

Leader Designation
Stores qualifications and status for a Contact. Should be connected to a National Program

Cancel Next

8. Begin typing in the name of the program leader in the ***Contact** box until the name appears in the drop-down list, then select the name to fill in the ***Contact** field. After you have selected the contact, type **"pl"** in the ***Leader Designation** field (shown below), then click **Enter** on your keyboard.

New Program Leader: Local

<p>Program Leader ID</p> <p>* Contact</p> <div style="border: 1px solid #ccc; padding: 2px;">ID Don McTester X</div> <p>Note</p> <p>Please type "pl" in the field below, click Enter, and select the existing Leader Designation record by clicking on the Program Leader ID to the far left. IMPORTANT: A Leader Designation record must exist before creating a Local record.</p> <p>* Leader Designation ⓘ</p> <div style="border: 1px solid #ccc; padding: 2px;">pl Q</div> <div style="border: 1px solid #ccc; padding: 2px;"><p>Q "pl" in Program Leaders</p><p>+ New Program Leader</p><p>Search Accounts... Q</p></div>	<p>Record Type</p> <p>Local</p> <p>* Role</p> <div style="border: 1px solid #ccc; padding: 2px;">--None-- v</div>
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CancelSave & NewSave

9. After typing "PL" and clicking **Enter**, a screen should appear displaying a list of all NAMI Program Leader Designation records the program leader has (shown below). To select the Leader Designation record, click on the the **Program Leader ID** to the far left (shown in red box below).

****IMPORTANT: A Leader Designation record must exist before adding a Local record for a program leader. If a Leader Designation record for the program leader does not show up on the list above, it means the program leader does not have a Leader Designation record for the program. To add a Leader Designation record, please go back to step #1.****

Program Leader Results

Leader Designation

Program Leaders
 1 Result

PROGRAM LEADER ID	CONTACT	PROGRAM	RECORD TYPE	ACTIVE
PL-84430	Don McTester	NAMI Family Support Group	Leader Designation	<input checked="" type="checkbox"/>

10. In the ***Program** box, type in "NAMI" (shown in red box below), and click **Enter** on your keyboard.

New Program Leader: Local

* Contact:

* Role:

Note
 Please type "pl" in the field below, click Enter, and select the existing Leader Designation record by clicking on the Program Leader ID to the far left. IMPORTANT: A Leader Designation record must exist before creating a Local record.

* Leader Designation:

* Program:

Q "nami" in Programs

- NAMI Family & Friends-NAMI TEST
NAMI Testing Affiliate
- NAMI Family Support Group

11. After typing in "NAMI" and clicking **Enter** on your keyboard, a list will appear displaying NAMI programs at a Local level. Please be sure to click on the appropriate program under Program Authorization (shown below).

Program Results

Program: nami

Programs
5 Results • Sorted by Relevance

PROGRAM AUTHORIZATION	STATE / AFFILIATE	RECORD TYPE	PARENT PROGRAM
NAMI Family & Friends	NAMI Testing Affiliate	Local	NAMI Family & Friends
NAMI Basics	NAMI Testing Affiliate	Local	NAMI Basics
NAMI Smarts	NAMI Testing Affiliate	Local	NAMI Smarts
NAMI Family Support Group	NAMI Testing Affiliate	Local	NAMI Family Support Group
Grupo de Apoyo para Familiares de NAMI	NAMI Testing Affiliate	Local	Grupo de Apoyo para Familiares de NAMI

Cancel

12. After selecting the program, its name will display in the ***Program** box. Next, fill in the ***Role** field (shown below) by clicking on the downward arrow and selecting **Program Leader** (shown below).

New Program Leader: Local

*Contact: Don McTester

*Role: Program Leader

Note
Please type "pl" in the field below, click Enter, and select the existing Leader Designation record by clicking on the Program Leader ID to the far left. IMPORTANT: A Leader Designation record must exist before creating a Local record.

*Leader Designation: PL-84430

*Program: NAMI Family Support Group

*Affiliate: Search Accounts...

Cancel Save & New Save

13. Proceed to fill out the ***Affiliate** box by typing "NAMI" in the box. Click on your Affiliate name within the drop-down list that appears. This will fill the ***Affiliate** field (shown below).

**** State Organizations:** If the Affiliate name does not appear in the drop-down list, type "nami" in the box and click **Enter** on your keyboard to display a list of NAMI Affiliates. Then, select the NAMI Affiliate of your choice by clicking on the Affiliate name to the farthest **left** side of the list (shown in yellow below).

New Program Leader: Local

***Contact**
Don McTester

***Role**
Program Leader

Note
Please type "pl" in the field below, click Enter, and select the existing Leader Designation record by clicking on the Program Leader ID to the far left. IMPORTANT: A Leader Designation record must exist before creating a Local record.

***Leader Designation**
PL-84430

***Program**
NAMI Family Support Group

***Affiliate**
nami

Account Results

Affiliate
nami

Accounts
1 Result

ACCOUNT NAME	TYPE	PRIMARY CONTACT/CHAPTER PRESIDENT	PHONE	BILLING CITY	BILLING STATE/PROVINCE	BILLING ZIP/POSTAL CODE
NAMI Family Support	Local		(703) 524-7800	Arlington		22203

14. Click **Save**.

New Program Leader: Local

*Contact: Don McTester

*Role: Program Leader

Note
Please type "pl" in the field below, click Enter, and select the existing Leader Designation record by clicking on the Program Leader ID to the far left. IMPORTANT: A Leader Designation record must exist before creating a Local record.

*Leader Designation: PL-84430

*Program: NAMI Family Support Group

*Affiliate: NAMI Testing Affiliate

Cancel Save & New **Save**

15. You will now see these program leader designations within your Program Leaders list in NAMI 360.

13	PL-84429	Don McTester	NAMI Family Support Group	Program Leader	Local	<input checked="" type="checkbox"/>	▼
14	PL-84430	Don McTester	NAMI Family Support Group	Program Leader	Leader Designation	<input checked="" type="checkbox"/>	▼