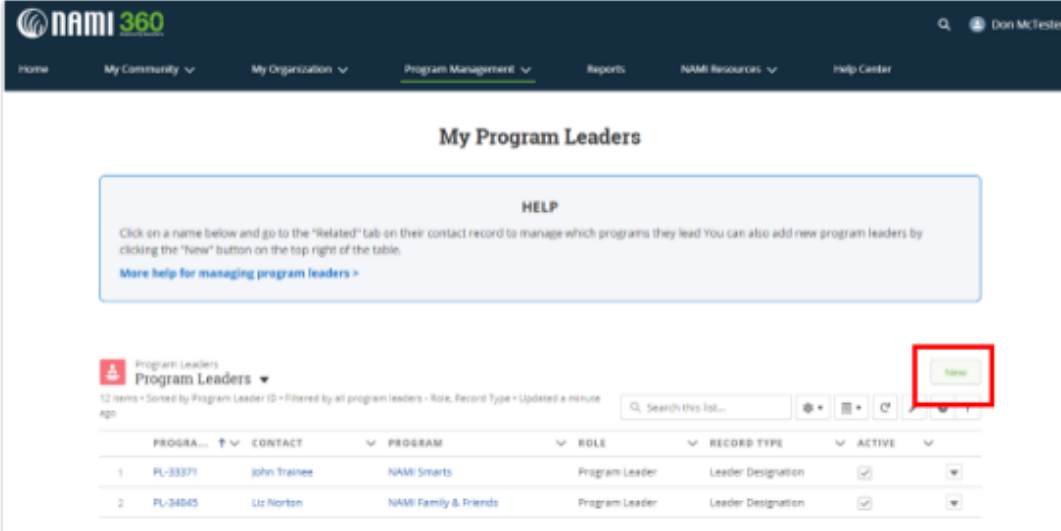# How do I add new program leaders?

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).

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

Cancel   Next

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
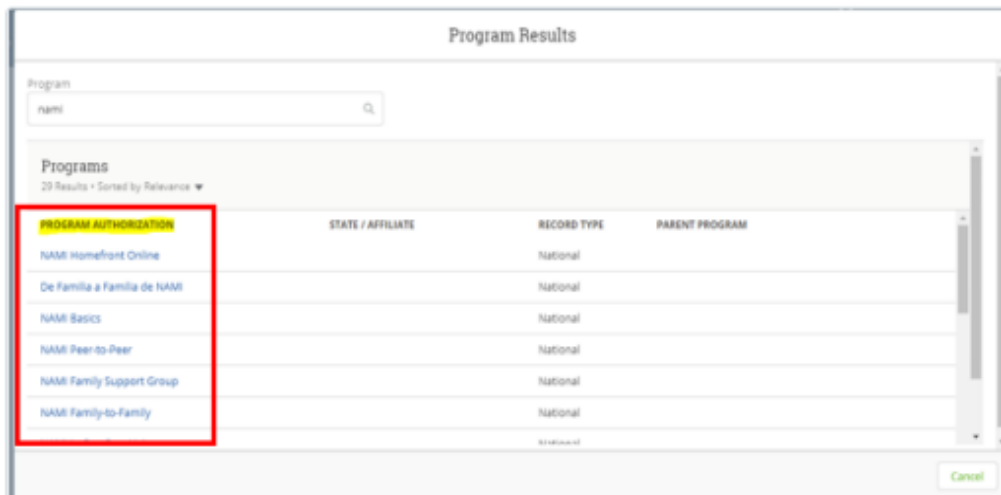
*Contact   Role
🔲 Don McTester   ✕   Program Leader   ▼

*Program   Master Active
nami   🔍   ☑

🔍 "nami" in Programs

🟩 **NAMI** Basics   Date of Re-Training

🟩 **NAMI** Family Support Group   📅

🟩 **NAMI** Peer-to-Peer

Cancel   Save & New   Save

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).

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

Don McTester

Role

Program Leader

* Program

NAMI Family Support Group

Training Information

Date of Initial Training ⓘ

Date of Re-Training

Cancel   Save & New   Save

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).

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

Program Leader ID

Record Type
Local

*Contact

[ID] Don McTester   ✕

*Role

--None--   ▼

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   🔍

🔍 "pl" in Program Leaders

+   New Program Leader

Search Accounts...   🔍

Cancel   Save & New   Save

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.*

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

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).

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).

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).

14. Click **Save**.

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