

Edit a Participant Admin or Staff Record

You may change a staff person from Admin to Staff, from Staff to Admin, add or remove the Payer role, update the Contact information, or inactivate a current CAP user.

Click on the  next to the name.

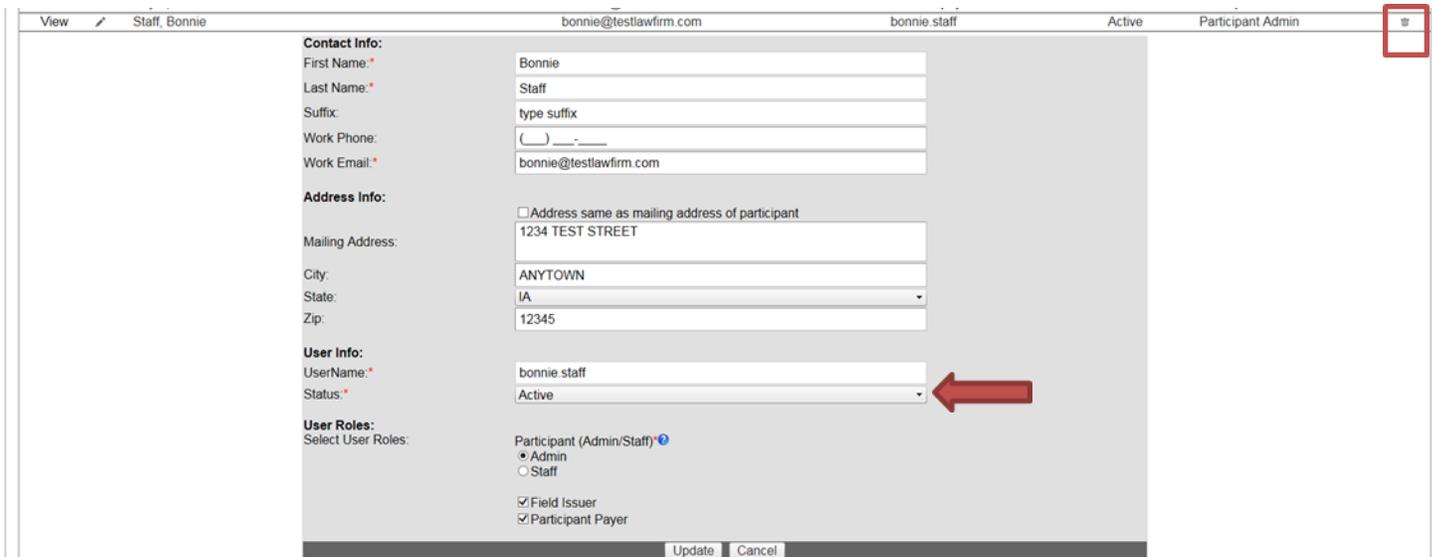
Modify the contact info, address info, user info or user roles.

To inactivate a user, click on Status: Inactive. This inactivates the user in CAP for all associated Participants.

Note! To remove a user from one Participant only, click on the  icon to disassociate the CAP User with the selected Participant. This should be used when a staff person no longer works for a specific Participant.

To modify the user role, click on Select User Roles: Admin or Staff. If a staff person is associated with more than one Participant, modifying the User Role in one Participant's record will modify the User Role for the staff person in the all associated Participant records.

Click on **Update**.



The screenshot displays a web application interface for editing a staff member's record. The top navigation bar shows the user is logged in as 'Staff, Bonnie' with the email 'bonnie@testlawfirm.com'. The record is for 'bonnie.staff', currently 'Active' and a 'Participant Admin'. A red box highlights a trash icon in the top right corner. The form is divided into several sections:

- Contact Info:** Fields for First Name (Bonnie), Last Name (Staff), Suffix (type suffix), Work Phone, and Work Email (bonnie@testlawfirm.com).
- Address Info:** A checkbox for 'Address same as mailing address of participant' and a Mailing Address field (1234 TEST STREET). Other fields include City (ANYTOWN), State (IA), and Zip (12345).
- User Info:** Fields for Username (bonnie.staff) and Status (Active). A red arrow points to the Status dropdown menu.
- User Roles:** A section for 'Select User Roles' with radio buttons for 'Participant (Admin/Staff)', 'Admin', and 'Staff'. Below these are checkboxes for 'Field Issuer' and 'Participant Payer', both of which are checked.

At the bottom of the form, there are 'Update' and 'Cancel' buttons.