



Consultant Profile Management and setup

Create a Consultant

In order to create a **Consultant**, you will need to be logged in as an Administrator. Scroll over the magnifying glass in the Trac Navigation bar and select **Center profiles**. In the Center Profile Listing, select the Center Profile that you want to create the Consultant in.

Once you've opened the Center Profile, navigate to the **Consultants** tab, and click **Load** to load the Consultants. Click on **List Options** and **Create New** to create a new Consultant.

General Info

Enter the **First Name** and **Last Name** of the new consultant. Under the name, you will see more tabs:

Classification

You can classify the consultants, in order to keep track of a group of consultants or run reports on them. (e.g. Peer Tutors, Student Workers, Advisors etc.)

Location

If you have multiple locations inside of one Center that Consultants can meet with a student at, then you may enter the primary location of a consultant here.

Fund

If you have multiple funding options for Consultant payrolls, you may enter the Fund that this Consultant is paid through here.

Alias

The Alias is used as an alternative name for the Consultants. This is useful if you allow students to book their own appointments, since it will prevent them from seeing the Consultant's full name.

Login

ID/Password

The login ID is required for all Consultants, even if you are using LDAP authentication. The password is optional for local authentication.

Payroll

The information on the right of the general info tab is for payroll information. Here you can enter an optional mailbox number, pay rate, and any hiring information you would like to record.

Schedule Tab

The Consultants have an optional schedule tab that will appear if the schedule tab checkbox is marked on their profile. The drop-down box indicates the access to their schedule the Consultant will have if no schedule privileges have been assigned through the Group that the Consultant is assigned to.

Notes

If you would like to keep any Notes about a Consultant on the Consultant's Profile, this would be the place to do so.

Contact Info

Address

Here you can enter the home or mailing address of the Consultant.

Email

The Consultant's email address is important if you would like to send emails to the Consultant regarding appointments.

Phone

You may enter up to four different contact numbers for each Consultant.

Notes²

This is a second notes field if you want to enter additional notes about the Consultant.

Student ID

If the Consultant is also a student, or if you want to track Consultant hours for payroll, the Consultant profile needs to be linked to a Student profile through the Student ID field. This box is a live search box, so you can search for the student profile by either name or Student ID. If the Student ID has not been created in the database, you can also create the profile from this field.

Subcenters

The **Subcenters** tab is where you assign the Consultant to the Center they will be working in. It's possible to assign a Consultant to more than one Center.

Note: Once you've completed the first three tabs, you'll need to save the Consultant Profile before continuing on to the other tabs.

Certifications

The **Certifications** tab allows you to add any Certifications that a Consultant receives to their profile. Click on **Create New** to add a new Certification.

Section Specialties

If the Consultant specializes in any courses that students are enrolled in, you can indicate which sections they are able to Tutor in by checking the box to the left of the Section. You may also use the Search box at the top of the page to filter your Sections by Subject, and then click Select to mark all of the filtered Sections at once.

Reason Specialties

If the Consultant specializes in any reasons that students visit the Center for, you can indicate the reasons here by checking the box to the left of each reason.