

E-Signer CORE User Manual



Office of Educator
Licensure and Effectiveness

March 2024



**State Board of
Education**

Contents

Overview	2
My E-Signature Approvals	2
Enroll as an E-Signer	3
E-Signer Enrollment Steps	4
Manage E-Signers	5
Remove an E-Signer from a College, University, School District or ESC	5
Remove an E-Signer from an LPDC	5
Designate Approvers and Reviewers.....	6
Two-Step Approval Process	7
Manage Preferences	8
Approve a Pending Request.....	9
Search E-Signer Requests	11
Application Status.....	12
Additional Resources.....	13
Educator Profile	13

Overview

The online CORE system allows you to manage applications and e-signers for your school or organization. You must have an OHID account and Educator State ID number in order to access this system. If you already have an OHID account and Educator State ID, do not request another one. If you do not already have an OHID account and Educator State ID number, begin by navigating to <https://ohid.ohio.gov/>. Please review information on the [Help Logging In](#) webpage if you need assistance with setting up your OHID account.

You may login and access the main page (My E-Signature Approvals) once you have created your OHID account and have been issued an Educator State ID number.

My E-Signature Approvals

From your E-Signer webpage, you can enroll as an e-signer for new organizations, access pending requests, manage other e-signers, search requests, and manage your preferences.

The screenshot shows two sections of the E-Signer interface. The top section, titled "E-Signer Information", contains a message: "As an e-signer you will review, approve and/or decline application requests. Please see the E-Signer User Manual for helpful information, such as:" followed by a bulleted list: "Updating district e-signer roles;", "Checking application details before approving license requests;", "Obtaining educator credentials electronically;", "Using Educator Profile as a helpful resource; and", and "How to use the two-step approval process to save time and reduce errors." The bottom section, titled "My E-Signature Organizations", features a search bar "Find E-Signature Request(s)" and a table with two rows. The first row is for "Test LPDC (IRN: 009561)" with roles "Coordinator-LPDC", "6 Requests Pending Review" (in a red pill), and an "Action" button. The second row is for "Example School District (IRN: 009604)" with roles "Credential e-Signer", "Not Enrolled", and an "Action" button.

Organization	Roles(s)	Status	Action
Test LPDC (IRN: 009561)	Coordinator-LPDC	6 Requests Pending Review	Action
Example School District (IRN: 009604)	Credential e-Signer	Not Enrolled	Action

(Figure 1 E-Signer Page)

To access this page, complete the following steps:

Step 1. Log in to your [OHID account](#) and click Educator Licensure and Records (CORE) to access your CORE Dashboard.

Step 2. Click on **License E-Signer** in the red ribbon at the top of your CORE Dashboard.

Enroll as an E-Signer

You will need to enroll as an e-signer in order to review and approve applications. You must hold one of the following roles in OEDS, as assigned by your organization's Ohio Educational Directory System – Redesign (OEDS-R) administrator, before you may enroll as an e-signer:

- Schools/School Districts
 - Superintendent or Superintendent Designee
 - Credential E-Signer
- Colleges/Universities
 - Dean – College of Education or Dean Designee – College of Education

LPDC COORDINATORS AND LPDC COORDINATOR DESIGNEES MUST ESTABLISH THEIR ROLES IN CORE.

- An LPDC member must first submit a request through the CORE LPDC Module to add this additional person to the LPDC Signer list. If appropriate, delete the person leaving at the same time.
- After the LPDC Administrator in the Office of Educator Licensure and Effectiveness approves the request, the new LPDC e-signer may enroll as an e-signer in CORE.

Please see page 4 for E-Signer Enrollment Steps.

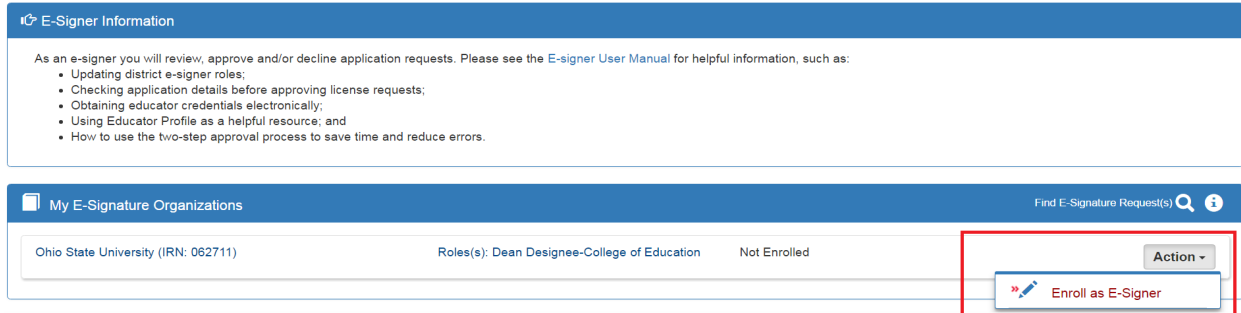
E-Signer Enrollment Steps

Once you have been assigned the appropriate role in OEDS, you must complete the following steps to become an active e-signer.

Step 1. Log in to your OHID account and click Educator Licensure and Records (CORE) to access your CORE Dashboard.

Step 2. Click on **License E-Signer** in the red ribbon at the top of your CORE Dashboard.

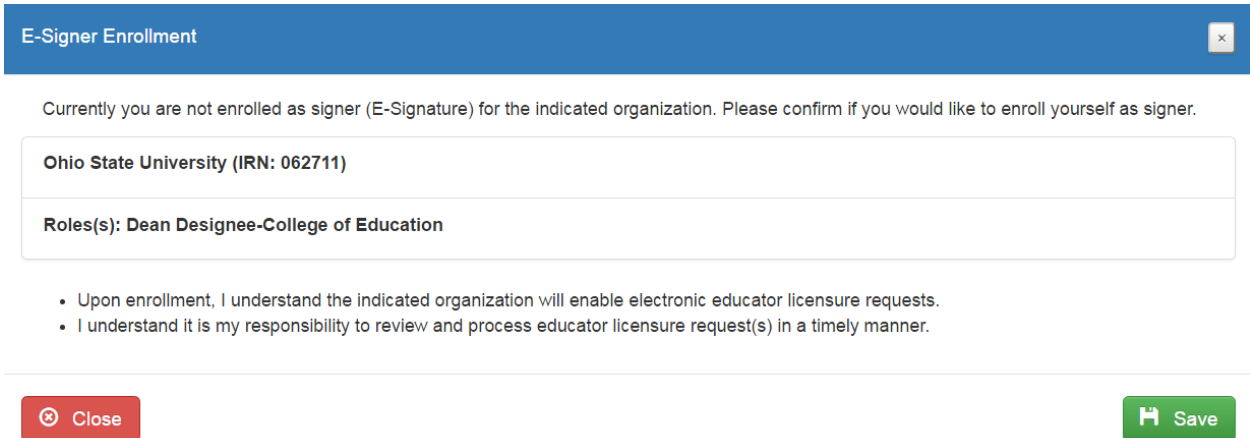
Step 3. Find the organization for which you need to enroll. Then select **Action** and click **Enroll as E-Signer**.



The screenshot shows two sections of the user interface. The top section, titled "E-Signer Information", contains a list of instructions for e-signers: "As an e-signer you will review, approve and/or decline application requests. Please see the E-signer User Manual for helpful information, such as: Updating district e-signer roles; Checking application details before approving license requests; Obtaining educator credentials electronically; Using Educator Profile as a helpful resource; and How to use the two-step approval process to save time and reduce errors." The bottom section, titled "My E-Signature Organizations", displays a table with one entry: "Ohio State University (IRN: 062711)" with the role "Dean Designee-College of Education" and status "Not Enrolled". An "Action" dropdown menu is open for this entry, showing the option "Enroll as E-Signer".

(Figure 2 Enroll as an E-Signer Screen)

When you click **Enroll as E-Signer** a pop-up will open to verify the organization you selected and your e-signer role. Click **Save** to confirm your enrollment and responsibilities as an e-signer for the organization.



The screenshot shows a pop-up window titled "E-Signer Enrollment". It contains the text: "Currently you are not enrolled as signer (E-Signature) for the indicated organization. Please confirm if you would like to enroll yourself as signer." Below this, the organization "Ohio State University (IRN: 062711)" and the role "Roles(s): Dean Designee-College of Education" are displayed. At the bottom, there are two bullet points: "Upon enrollment, I understand the indicated organization will enable electronic educator licensure requests." and "I understand it is my responsibility to review and process educator licensure request(s) in a timely manner." At the bottom left is a red "Close" button, and at the bottom right is a green "Save" button.

(Figure 3 E-Signer Enrollment Confirmation)

Manage E-Signers

When e-signers are added or leave an organization, please update all systems accordingly so that access to sign licensure applications is granted appropriately and in a timely fashion.

Remove an E-Signer from a College, University, School District or ESC

Step 1. In CORE, select **Action**, then **Manage E-Signers** and click on the Delete icon to remove this person's role as an e-signer for your organization from the CORE system. Any enrolled e-signer for your organization may do this. Please note that e-signers who are not removed before leaving your organization may still receive emails and have access to pending licensure approvals.

Step 2. Request the OEDS Administrator for your organization to remove the role (Superintendent, Superintendent Designee, Credential E-Signer, Dean – College of Education, or Dean Designee – College of Education) from the individual. Note: It may be appropriate to keep the role for that individual, if they are no longer e-signing licensure applications but are remaining in their capacity at your organization.

Remove an E-Signer from an LPDC

Step 1. In CORE, select **Action**, then **Manage E-Signers** and click on the Delete icon to remove this person's role as an e-signer for your organization from the CORE system. Any enrolled e-signer for your organization may do this. Please note: If an e-signer is not removed before leaving your organization, the individual may still receive emails and have access to pending licensure approvals.

Step 2. Submit a request through the CORE LPDC Module to delete this person from the LPDC Signer list. If appropriate, add the new person at the same time.

Designate Approvers and Reviewers

E-signers may enable email notification of application requests and remove or change the preferences of e-signers. **No Preference** is the default setting before a profile is created for an e-signer. Select **Manage E-Signers** and a pop-up will open. Select **Action** to make the appropriate change for that e-signer.

Name	Role	Email Notification	Level	
John Superintendent	Superintendent Signature	Enabled	Approver	Action ▾
Suzanne Superintendent	Superintendent Signature	Enabled	Reviewer	Action ▾

(Figure 4 Manage E-Signers Screen)

Two-Step Approval Process

The Two-Step Approval Process is an option for organizations that want one person to be an initial Reviewer of applications and a second person to be an Approver for final approval and electronic signature.

A Reviewer will be able to look at all pending online applications, verify them, and if eligible, mark them as reviewed (or declined) and forward them to the Approver. The Approver will see only those online applications that are ready and marked as reviewed. The Approver will not see an application that the Reviewer has declined. Once the Approver receives the applications, they will then be able to approve (sign) or decline them.

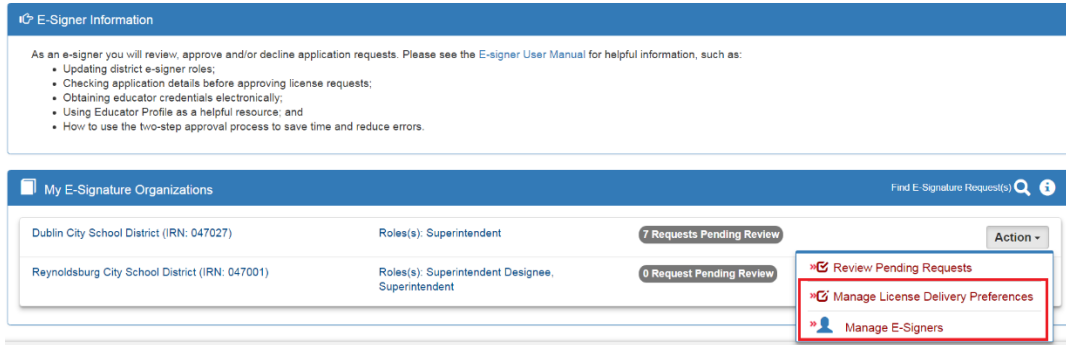
The following business rules apply for setting up the Two-Step Approval Process:

1. Any signer organization type may choose to utilize the Two-Step Approval Process.
2. In order to utilize the Two-Step Approval Process, an organization must have at least two e-signers.
3. All potential signers must first be enrolled as e-signers before they choose their designation as the Approver or Reviewer for the organization.
4. If the Two-Step Approval Process is not used, then all e-signers for an organization will have the default settings of **Yes – Receive Email Notifications**. Additionally, every e-signer's profile will default to **No Preferences**. They will see all pending applications and be able to approve or decline them.
5. An organization cannot have all Reviewers and no Approvers or vice versa.
6. An organization may have a Reviewer and someone with the No Preferences or Approver designation.
7. At least one e-signer in your organization must have their email notification set to **Yes**.
8. A Reviewer will see only pending application requests. The Approver must approve or decline the application for the system to forward it to the Office of Educator Licensure and Effectiveness. The system will not forward an application to our office if only the Reviewer has processed it.
9. A Reviewer may approve the request and mark it as Reviewed for the Approver, or decline the request and not forward it to the Approver.
10. An Approver will see only Reviewed application requests and may approve or decline an application.

Manage Preferences

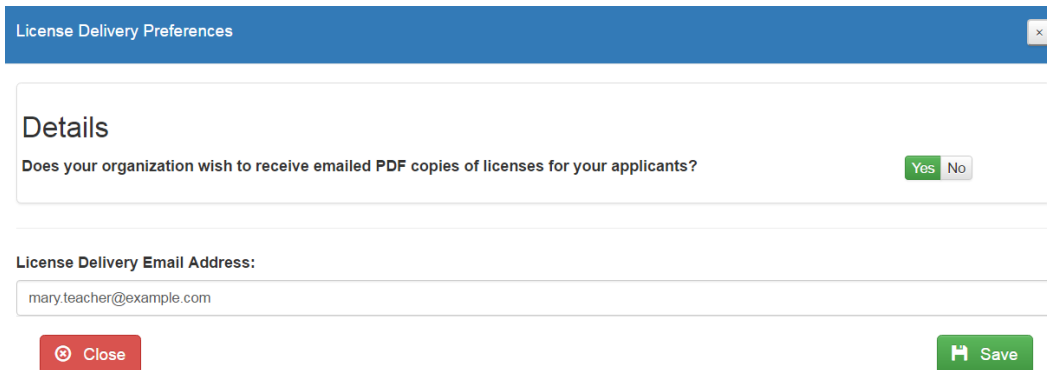
You may choose your license delivery preference and manage enrolled e-signers from the My E-Signature Approvals screen.

From the My E-Signature Approvals screen select **Action**, then **Manage License Delivery Preferences** or **Manage E-Signers**.



(Figure 5 E-Signers Approvals Screen)

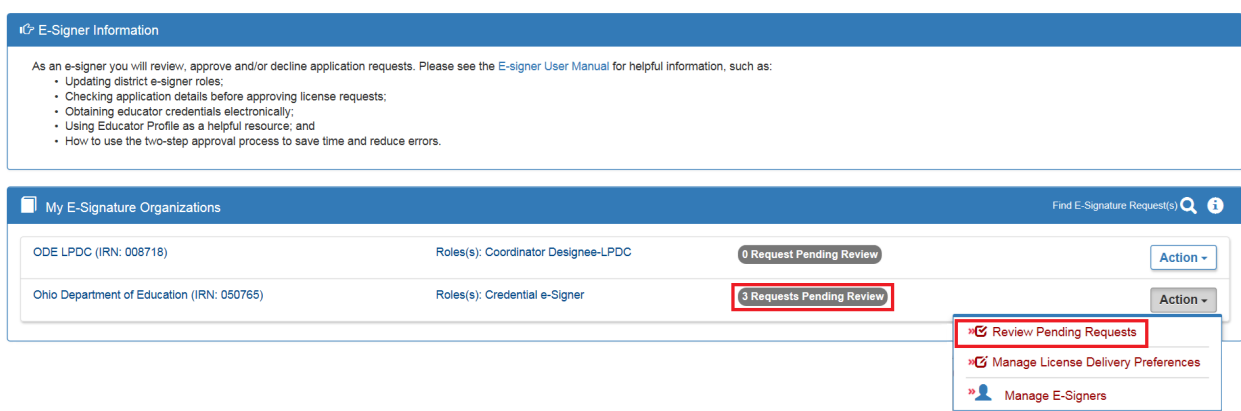
To turn on the license delivery option, select **Manage License Delivery Preferences**. A pop-up will open in which you may click **Yes** and enter the email address to which you want the licenses sent. You may enter only one email address per IRN to deliver licenses you approve. NOTE: The Office of Educator Licensure and Effectiveness does not email previously issued licenses. Please see the Search E-Signer Requests section for directions regarding how to download and print a license your organization previously approved (current licenses only). To turn off the license delivery option, select **No**.



(Figure 6 License Delivery Preferences Pop-Up Window)

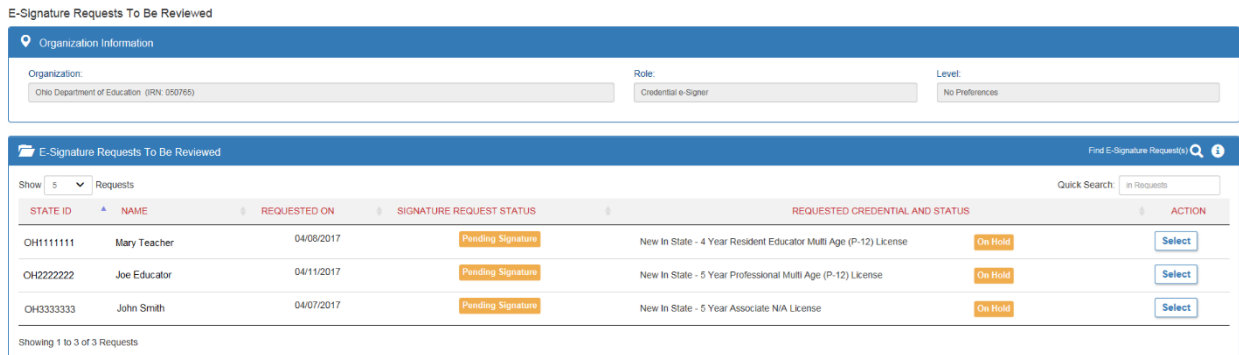
Approve a Pending Request

There are two ways you may access the online applications submitted to your organization for review. From the My E-Signature Approvals screen you can click on **# Requests Pending Review**, or select **Action** then **Review Pending Requests**.



(Figure 7 Approve Pending Request Screen)

The next screen shows all pending requests for the organization you selected.



(Figure 8 Pending Requests Screen)

The system will take you to the E-Signature Request Detail page when you click **Select** next to a request.

(Figure 9 Educator Information Screen)

This page displays the educator’s information. If you wish to see more information, select **Additional Information** on the top right. This will open a new tab into Educator Profile, which contains more information about the educator. Note: You may click on the email address displayed in the demographic section. The link that will open your email system with a new email addressed to that individual in which you may include application instructions or requirements the applicant needs to fulfill.

The Credential Requested section indicates which credential the educator has requested. In this section, e-signers may do the following:

- Edit effective years.
- Deans and Dean Designees may edit teaching fields and endorsement areas.

The Electronic Signature section is where you will approve or decline the request. In this section, e-signers will do the following:

- Select the action to approve or decline the application.
- Indicate in the Comment section why you declined the application. Only the Office of Educator Licensure and Effectiveness will be able to see your comments, not the applicants.
 - Please note: Applicants are not charged an evaluation fee when your organization declines their applications.
- If the request is complete, select **Process Request**. If you would like to save the request and return to it later, select **Return to My E-Signature Approvals**.

Search E-Signer Requests

This tool allows you to view applications that your organization has not yet electronically signed as well as the status of applications pending review or processed by the Office of Educator Licensure and Effectiveness.

You can select multiple search criteria in the E-Signature Search Criteria section. Organization is the only required search field. Once you enter the criteria you are looking for, select **Find Request(s)**.

The E-Signature Requests section will populate with the results. By selecting **View** on a request, you can view the request record, or by selecting **Download** you can download a PDF version of the issued credential and then print it for your records. You can also download all of the search results by selecting **Download Results**. This will create an Excel file with all of the applicant data in columns.

Please note: You may only download and print currently valid credentials that your organization approved. The system will not allow you to download and print expired credentials or credentials your organization did not approve.

Find E-Signature Request(s)

E-Signature Request Search Criteria
?

Use the search fields below to find historical or pending online application requests. Organization is the only required search field.

Organization Name IRN: <input type="text" value="-- Please Select Organization --"/>		Signature Requests Status: <input type="text" value="-- Please Select --"/>	Credential Request Status: <input type="text" value="-- Please Select --"/>	
Educator First Name: <input type="text"/>	Educator Last Name: <input type="text"/>	Educator State ID: <input type="text" value="AA0999999"/>	Educator SSN-4: <input type="text" value="XXXX"/>	Educator Date of Birth: <input type="text" value="mm/dd/yyyy"/>
Term: <input type="text" value="-- Please Select --"/>	Prof. Classification: <input type="text" value="-- Please Select --"/>	Category: <input type="text" value="-- Please Select --"/>	Effective Year: <input type="text" value="-- Please Select --"/>	Requested On/After: <input type="text" value="mm/dd/yyyy"/>
				Requested On/Before: <input type="text" value="mm/dd/yyyy"/>

Select Organization Name or IRN to enable 'Find Request(s)'

E-Signature Requests
Download Results ?

Show Requests Quick Search:

STATE ID	NAME	REQUESTED ON	SIGN. REQUEST STATUS	SIGNER NAME	REQUESTED CREDENTIAL AND STATUS	ACTIONS
OH1111111	Mary Teacher	06/04/2015	Approved	Bill Signer	Renew - 5 Year Professional School Psychologist License Issued	<input type="button" value="Download"/> <input type="button" value="View"/>
OH2222222	Joe Educator	04/28/2016	Approved	Bill Signer	Align - 5 Year Professional Administrative Specialist License Issued	<input type="button" value="Download"/> <input type="button" value="View"/>
OH3333333	John Smith	06/26/2014	Declined	Bill Signer	Renew - 5 Year Professional Elementary (1-8) License Declined	<input type="button" value="View"/>
OH4444444	Jane Williams	06/15/2014	Declined	Bill Signer	Renew - 5 Year Professional Elementary (1-8) License Declined	<input type="button" value="View"/>
OH5555555	Bob Jones	06/15/2014	Declined	Bill Signer	Renew - 5 Year Professional Intervention Specialist (K-12) License Declined	<input type="button" value="View"/>

Showing 1 to 5 of 46 Requests

(Figure 10 Search E-Signature Requests Screen)

Application Status

- **Issued** – The Office of Educator Licensure and Effectiveness approved the application and issued the credential.
- **Declined** – The application was declined by either the Office of Educator Licensure and Effectiveness or the e-signer of the school or district indicated in the application, or the CORE system auto-declined the application after it was on hold for more than 60 days. Note that applicants do not receive comments when their applications are declined by a school, district, ESC, or LPDC. You must contact the applicant directly regarding their application (see page 13 for more information on how to contact an applicant through Educator Profile).
- **Pending Review** – The Office of Educator Licensure and Effectiveness is reviewing the application and has not yet approved or declined it. Applications are processed in the order in which they are received. Please note that the application processing time for the Office of Educator Licensure and Effectiveness is 7-10 business days. If an application must then go through the Office of Professional Conduct for further review, it will take longer to process, and the Pending Review status will remain. If it has been more than 10 business days since you approved the application, please have the applicant log in to their OHID account and verify the comments regarding the status of the application. Comments from the Office of Professional Conduct may only be viewed by the applicant.
- **On Hold** – The Office of Educator Licensure and Effectiveness has reviewed the application and placed it on hold for additional requirements.
 - The applicant is sent an email regarding the additional requirements and instructions.
 - The hold time for applications is 60 days.

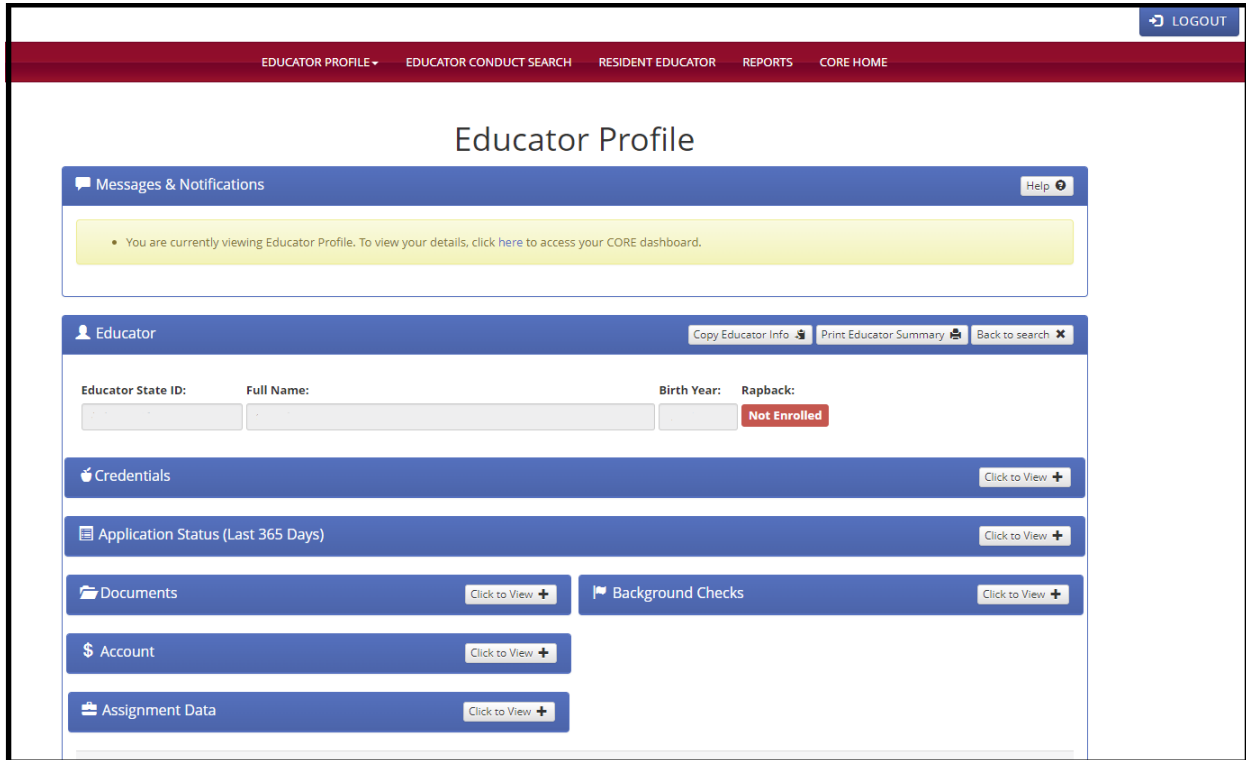
You may view the Office of Educator Licensure and Effectiveness comments in the E-Signature Requests screen (see Figure 10 on page 11) by hovering your cursor over the status of the application.

Applicants are sent an email regarding the status of their applications each time there is a status change.

Additional Resources

Educator Profile

Educator Profile is an important resource you may use to access additional information regarding applicants, including their demographic information, previously issued credentials, other pending applications, and background checks. Additionally, you may click on the email address displayed in an applicant's demographic section. The link will open your email system with a new email addressed to that individual in which you may include application instructions or requirements they need to fulfill.



(Figure 11 E-Signer Educator Profile Screen)