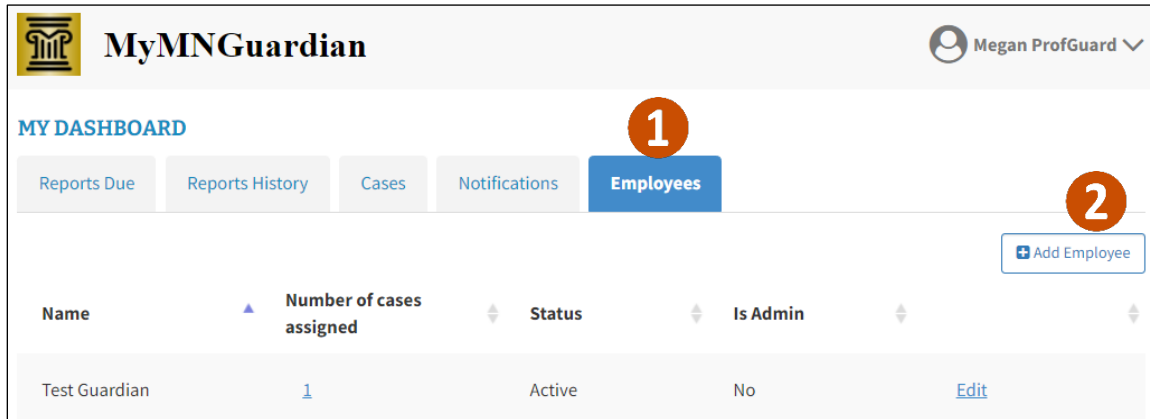


## QRG – Adding and Editing Employees and Cases

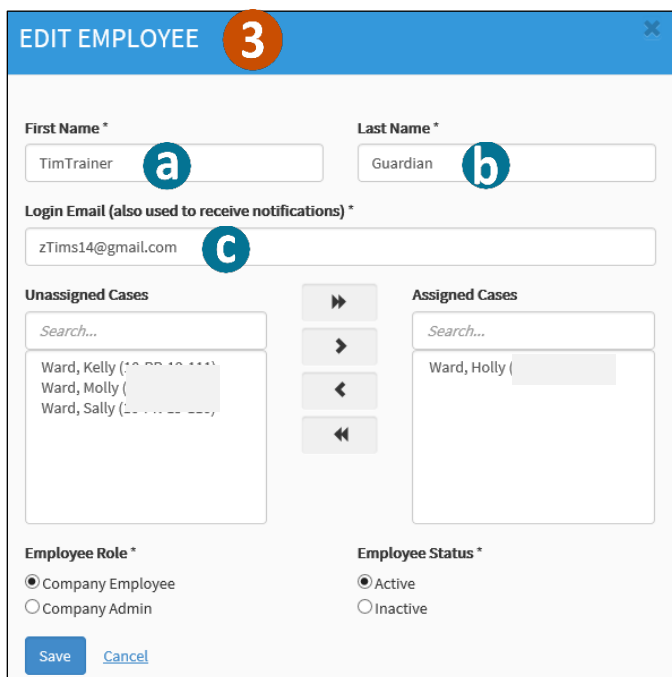
### Add employees and cases

1. Click **Employees**. Administrators must set up a MyCourtMN account before adding employees.
2. Click **Add Employees**.



The screenshot shows the MyMNGuardian dashboard. At the top left is the logo and the text "MyMNGuardian". At the top right is a user profile for "Megan ProfGuard". Below this is a "MY DASHBOARD" section with several tabs: "Reports Due", "Reports History", "Cases", "Notifications", and "Employees". The "Employees" tab is highlighted with a red circle labeled "1". To the right of the "Employees" tab is a red circle labeled "2" pointing to a blue button that says "+ Add Employee". Below the tabs is a table with columns: "Name", "Number of cases assigned", "Status", and "Is Admin". The table contains one row for "Test Guardian" with 1 case assigned, an "Active" status, and "No" for "Is Admin". There is an "Edit" link at the end of the row.

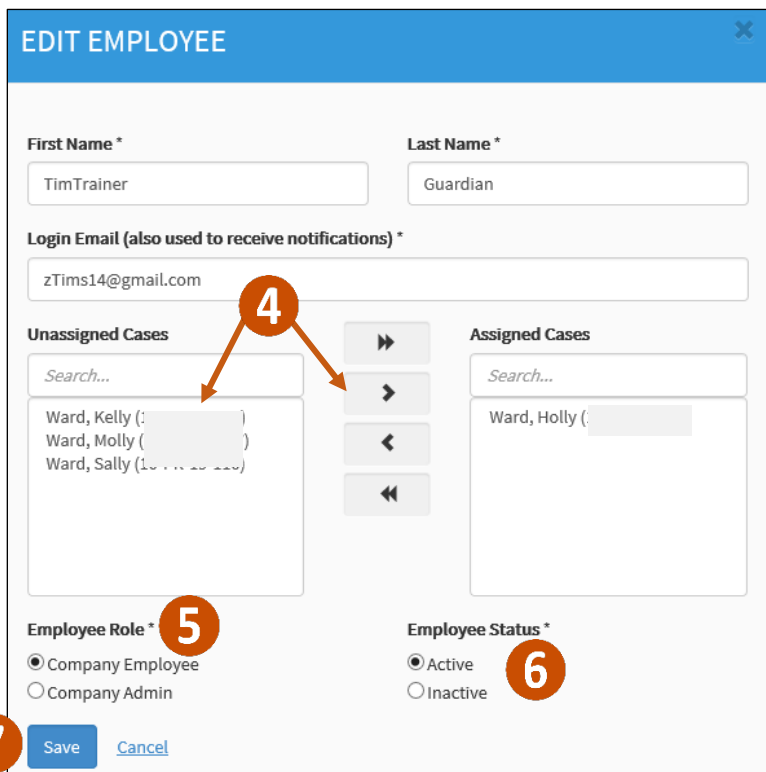
3. Add the information below:
  - a. First Name
  - b. Last Name
  - c. Login Email



The screenshot shows the "EDIT EMPLOYEE" form. At the top is a blue header with the text "EDIT EMPLOYEE" and a red circle labeled "3". Below the header are two text input fields: "First Name \*" with the value "TimTrainer" and a red circle labeled "a", and "Last Name \*" with the value "Guardian" and a red circle labeled "b". Below these is a "Login Email (also used to receive notifications) \*" field with the value "zTims14@gmail.com" and a red circle labeled "c". Below the email field are two sections: "Unassigned Cases" and "Assigned Cases". Each section has a search box and a list of cases. The "Unassigned Cases" list includes "Ward, Kelly", "Ward, Molly", and "Ward, Sally". The "Assigned Cases" list includes "Ward, Holly". Below these sections are two radio button groups: "Employee Role \*" with options "Company Employee" (selected) and "Company Admin", and "Employee Status \*" with options "Active" (selected) and "Inactive". At the bottom are "Save" and "Cancel" buttons.

## QRG – Adding and Editing Employees and Cases

4. As applicable, select a case and click the arrow. The case will move under the employee.  
To assign all cases, click the double arrow.
5. Select the **Employee Role**.
  - Company Employee
  - Company Admin - The company admin can add employees, and assign and unassign cases.
6. Select the **Active** Employee Status.
7. Click **Save**. A success message displays.



The screenshot shows the 'EDIT EMPLOYEE' form with the following fields and options:

- First Name \***: TimTrainer
- Last Name \***: Guardian
- Login Email (also used to receive notifications) \***: zTims14@gmail.com
- Unassigned Cases**: Search...  
Ward, Kelly (: )  
Ward, Molly ( )  
Ward, Sally (1... )
- Assigned Cases**: Search...  
Ward, Holly ( )
- Employee Role \*** (5):
  - Company Employee
  - Company Admin
- Employee Status \*** (6):
  - Active
  - Inactive
- Buttons** (7): Save, Cancel

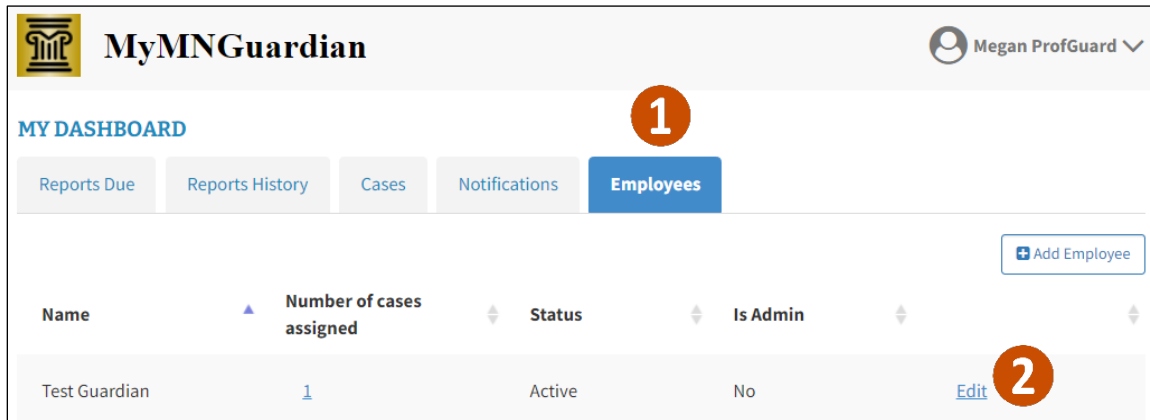
Callout 4 points to the arrows between the Unassigned and Assigned Cases sections. Callout 5 points to the Employee Role radio buttons. Callout 6 points to the Employee Status radio buttons. Callout 7 points to the Save button.

- !** If a message displays that says the email address already exists, this means the employee already created an account. Go to the guardian Contact Us tab on the [Minnesota Judicial Branch](#) website, and send an email to the support team.

## QRG – Adding and Editing Employees and Cases

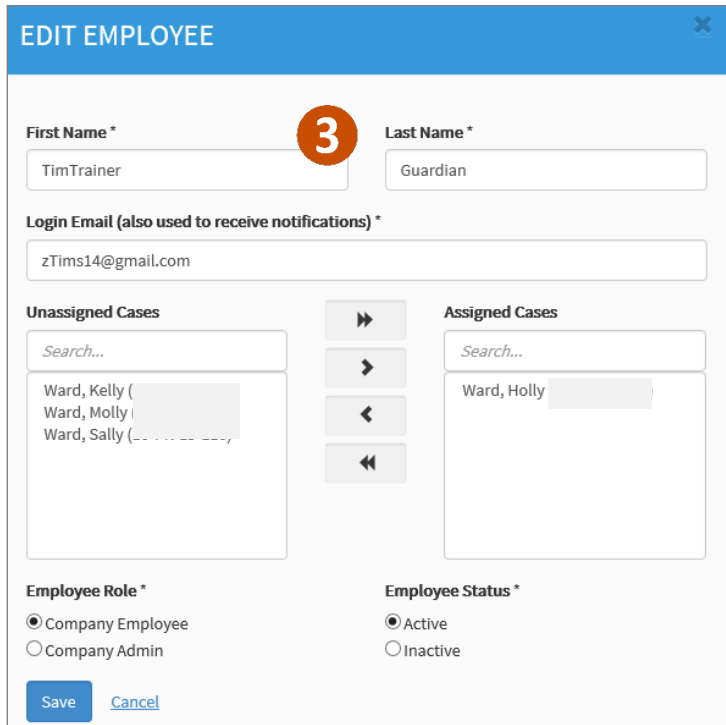
Edit an employee’s name, unassign cases, and change their role or status

1. Click **Employees**.
2. Click **Edit**.



The screenshot shows the MyMNGuardian dashboard. The 'Employees' tab is selected and highlighted with a red circle '1'. Below the tabs, there is an 'Add Employee' button. A table lists employees with columns for Name, Number of cases assigned, Status, and Is Admin. The first row shows 'Test Guardian' with 1 case assigned, an 'Active' status, and 'No' for 'Is Admin'. An 'Edit' link is visible at the end of the row, highlighted with a red circle '2'.

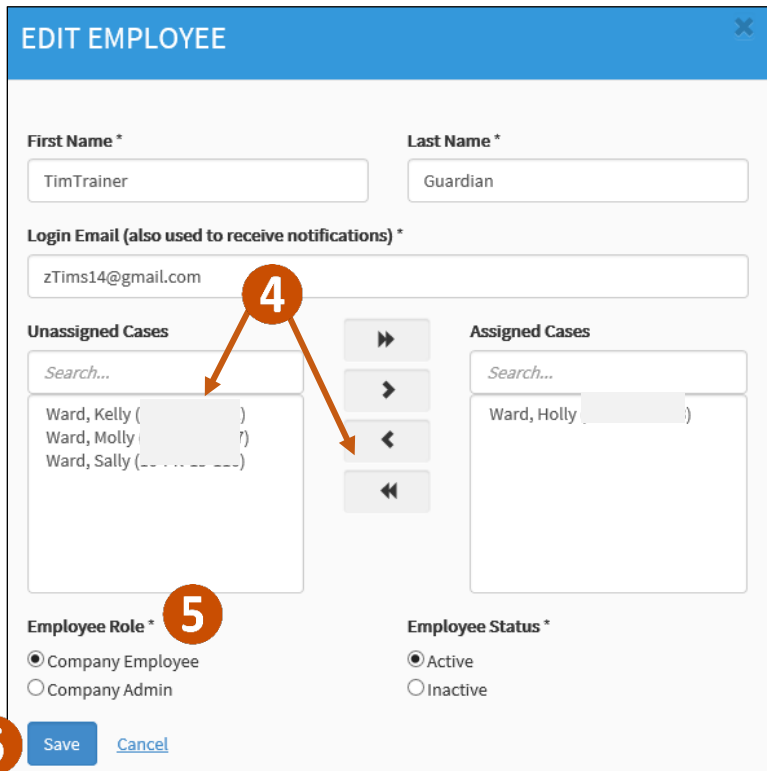
3. Make all necessary changes to the first name and last name.



The screenshot shows the 'EDIT EMPLOYEE' form. The 'First Name' field contains 'TimTrainer' and the 'Last Name' field contains 'Guardian', both highlighted with a red circle '3'. The 'Login Email' field contains 'zTims14@gmail.com'. There are two sections for cases: 'Unassigned Cases' and 'Assigned Cases'. The 'Unassigned Cases' list includes 'Ward, Kelly', 'Ward, Molly', and 'Ward, Sally'. The 'Assigned Cases' list includes 'Ward, Holly'. At the bottom, there are radio buttons for 'Employee Role' (Company Employee selected, Company Admin) and 'Employee Status' (Active selected, Inactive). 'Save' and 'Cancel' buttons are at the bottom left.

## QRG – Adding and Editing Employees and Cases

4. As applicable, select the case to unassign and click the arrow. To unassign all cases, click the double arrow.
5. To change their role, select the new role.
6. Click **Save**.



The screenshot shows the 'EDIT EMPLOYEE' form with the following fields and controls:

- First Name \***: Text input containing 'TimTrainer'
- Last Name \***: Text input containing 'Guardian'
- Login Email (also used to receive notifications) \***: Text input containing 'zTims14@gmail.com'
- Unassigned Cases**: A list box containing 'Ward, Kelly ( )', 'Ward, Molly ( )', and 'Ward, Sally ( )'. A search bar is above the list.
- Assigned Cases**: A list box containing 'Ward, Holly ( )'. A search bar is above the list.
- Employee Role \***: Radio buttons for 'Company Employee' (selected) and 'Company Admin'.
- Employee Status \***: Radio buttons for 'Active' (selected) and 'Inactive'.
- Buttons**: 'Save' and 'Cancel' buttons at the bottom left.

Numbered callouts indicate the following actions:

- 4**: Points to the arrow between the Unassigned and Assigned cases lists.
- 5**: Points to the 'Company Employee' radio button.
- 6**: Points to the 'Save' button.