Add Staff to Your Roster

Sample University (9 members)

1. Click on the Add Staff button from the Portal homepage.
2. This will take you to the Search Members page.

3. Search the CASE database to ensure your colleague does not already have a record. Please do not create new records for individuals already in the CASE database.
   - To search by State/Province, select the appropriate Country first.
   - Use the % symbol as a wild card if you aren't sure of spelling.
   - If you know a new employee has come from another institution be sure to also search for his/her record using prior employer criteria.

   *If your search returns similar results and you are not sure, either contact the new employee directly to confirm the information or contact CASE for assistance.*
Adding staff who were employed at a different institution

If your search returns a record for the new employee and that employee is listed at his or her former institution, check the Add checkbox in the row and click on the Add Selected Individual To Roster button on the bottom of the page. You will see a pop-up message confirming your request to add the staff to your roster. *Hint: You can also have staff add themselves to your roster by directing them to [www.case.org/account](http://www.case.org/account).*

1. Next, you will receive a pop-up with the following message. Click Yes to proceed.

   This individual is already affiliated with a different institution. By clicking YES, this action will remove all affiliation with the previous institution. You will be asked to provide updated contact information on the next screen. Are you sure you want to proceed? If you are not sure, please click NO or contact CASE for further assistance.

   Individual: Nel Newstaff

   ![Pop-up message](image)

   [Yes] [No]

2. Complete the contact information for the new employee and click the Save button.
3. The individual will now appear on your CASE membership roster.
Nel Newstaff

*Required

* Email Address:  nnewstaff@sampleunitx.edu
* Primary Area of Responsibility:  Overall Management of Adv.
* Job Title:  VP of Finance (New Hire)
* Phone:  202 328-2273  EXT
Adding staff who were not found in your search

If your search does not return a record you can create a new record by clicking on the Individual Not Found. Create a New Record? button. Please do not create new records without searching the CASE database first. Hint: You can also have staff add themselves to your roster by directing them to www.case.org/account.

1. The first screen will verify the new employee’s email is not already in the CASE database.
2. The second screen will ask you to complete the contact information for the new employee. When finished, click on the Find Company button. Hint: be sure to enter your institution’s name in the Company Name box exactly as it is listed on your CASE membership.
3. Select your institution and click **Continue**.
4. Complete the rest of the contact and demographic information for the individual and click **Add**.
5. The individual will now appear on your CASE membership roster and will receive a welcome email from CASE.