Guide to change details of an existing User

Only available for CPMT Chair and CSA Coordinator

Please Note: email address change request has to sent to csa.itsupport@csa.virginia.gov

To edit the existing Users

- 1. Login to Account Management System under Applications on the CSA website's home page.
- 2. If you don't remember your password. Click on the Reset / Forgot Password link below the Create New Account Button. Then follow instructions on screen and email.
- 3. After successful Login. Click on Edit/Update Users tab (This tab is only active for Local Approver's i.e. CPMT Chair and CSA Coordinator)
- 4. Local Approver's have the Edit/Update User tab. This tab will display list of all active Users in the locality.

| Office of Children's Services Importing Crimitian Discourse | | | | | | | | | |
|--|-------------------------------|-------------------|----------------------------------|-----------|----|---|---|----------|---|
| Account Management System - | OCS State Office (200) | it | | | | | | | |
| My Approvals Register User | Edit Profile Edit/Update User | 's Activate Users | Approver looikit SFD Admin | | | | | | |
| Edit / Update Existing Users | | | | | | | | | |
| Agency/Locality /System:* | Washington - 191 | ~ | Role: Se | lect Role | | ~ | | | |
| Name | | | | | | | | | |
| Address: | | | City: | | | | | | |
| ZipCode: | | | Email: | | | | | | |
| Show deleted/deactivated | lusers | | | | I. | | | | |
| X Export | | Sea | arch Reset | | L | | | | |
| Agency/Locality/Provider | Name | Phone | Email | | Ļ | | | | |
| Washington (191) Jeffrey Justice | | 276-645-7450 | jeffrey.justice@dss.virginia.gov | | Ĵ | Ŵ | ۶ | â | C |
| Washington (191) | Regina Kinder | 276-971-2674 | rkinder@highlandscsb.org | Q | _Û | Ŵ | ۶ | â | C |
| Washington (191) | Shelia Tuggle | 276-525-1584 | stuggle@highlandscsb.org | Q | Ĵ | Ŵ | ۶ | a | L |
| Washington (191) | Teresa Caudell | 276-645-5041 | teresa.caudell@dss.virginia.gov | Q | _0 | Ŵ | ۶ | Å | L |

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|------------------------|------------|--------------------|-------------------|------------------------|-------------------------------|------------|
| onnumber to serveyduch | Accontact | K * 1 | | | | |
| Agency:* | County of | Accomack | | | | |
| Position: | | | | | SU/RA | |
| Phone:* | 757-787- | 5737 | | | PMT Chair | |
| Ext: | | | | | SA Coordinator | |
| Eave | | | | | 4E - File Uploader | |
| Fax. | 757-787-2 | 2468 | | - Fi | scal Agent | |
| Email:* | aford@co. | .accomack.va.us | | | BDRS CSA - Preparer | |
| Address Line 1:* | 23296 Co | urthouse Ave | | | BDRS T4E - Preparer | |
| Address Line 2: | | | | | | |
| P.O.Box#: | 620 | | | | | |
| City:* | Accomac | | | | | |
| State:* | Virginia | | ~ | | | |
| Zip Code:* | 23301 | | | | | |
| Zip Ext: | | | | | | |
| Role:* | Fiscal Age | ent 🗸 | | | | |
| | Update | Cancel | | | | |

5. The Edit (Pencil icon) is used to Edit the details of a User. The follow screen is displayed

- a. Change the all fields that needs to be changed
- b. To change Role, click arrow, the list of Roles will appear and check all roles the User will need. After checking all Roles. Click outside the selection box.
- c. Click on the Update button

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d. The following pop-up box is displayed

| 10.193.21.208 | says |
|---------------------|---|
| Existing roles have | ve been modified. Addition of new role(s) will go |
| through an appr | oval process. Removal of previously approved role(s), |
| will limit User acc | cess to that role specific functions in CSA Systems. Do |
| you want to proc | ceed? |

e. Click on OK button

<u>Please Note:</u> Depending on the Role requested an approval notification is sent to either Locality's CPMT Chair or Locality's CSA Coordinator.

- i. FA, CSA Coordinator CPMT Chair Approval
- ii. All other roles CSA Coordinator Approval
- 6. If there was a change is User's Role then, Locality Approver will need approve the User Role changes, by:
 - a. Clicking on My Approvals tab
 - b. Click on the Review (Notes icon)
 - c. On the popup screen click on the Approve Button

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|--|---|--------------------|--|---|---|-------------------|--------------------------|------------|---|
| | | | User Details | | | × | | | |
| Account Management My Approvals My Approvals | nt System - Register User | OCS Stat | Name: Amy Ford Locality/Agency: Accon Phone: 757-787-5737 Fax: 757-787-2468 | Ageno nack (001) , Ext: | y: County of Accor | mack | | | |
| Locality/Agency | | Name | Email: aford@co.acco Address: 23296 Court | mack.va.us house Ave Accomac VA : | 23301 | а | 11 | | |
| Accomack (001) | | Amy For | Approval Request Date: | 7/20/2022 1:13:22 AM | | 1 | @co.accomack.v | /a.us | |
| Accomack (001) | | 1373 | Active Roles: Fiscal Ag Roles Pending Approval Rejection Reason: Select Reject Re | ent : DSU/RA eason V Approve R | eject | - | @va.gov | | ≣ |
| Loc | al Govern | ment | | | | | | | Governme |
| : | Program Aud Reporting Service Fee | dits Directory | | | | Close | | | Departm Departm Departm |
| Stat | tistics and | Publicat | tions | | High Fidelity Wrapa OCS Newsletter | around | | | Departm Develop Departm |