Office of Children's Services
Empowering communities to serve youth

CSA IT Applications
New Coordinators Academy

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CSA Main Website

Compatibility View Settings - Change

Steps to change settings (a screen shot is also provided for convenience):

- Step 1: Click on the IE Tools Settings icon ⚙
- Step 2: Click on Compatibility View Settings
- Step 3: If virginia.gov is in the big white box select it and click on **Remove**
- Step 4: **Uncheck** the Display Internet Site in Compatibility View
- Step 5: **Uncheck** the Use Microsoft compatibility lists
- Step 6: Close

Resources

Resources - Funding and Financial Reporting

Account Management System (AMS)

What is the purpose?

The Account Management System (AMS) provides a user-friendly application to create, manage and search existing accounts in Local Government Reporting / Roster Reporting that is used by local government and agency staff. Depending on role, users are able to access and use the web pages on Local Government Reporting.

Account Management System (AMS)

What are the features?

AMS allows users to:

- Create new user or system accounts with an associated password.

- Search for existing user or system accounts.

- Manage an existing user or system account.

- Reset passwords on existing accounts

Account Management System (AMS)

What are the benefits?

- Provides an organized way to create, manage, search or deactivate existing user or system accounts.

- Improves role assignment functionality.

- Consolidates actions on search results screen.

Account Management System (AMS)

CSA maintains an on-line directory, of individuals filling a variety of local CSA roles including:

- CPMT Chair
- Fiscal Agents
- CSA Coordinator
- Report Preparers
- CANS Super Users
- Title IV-E File Uploader

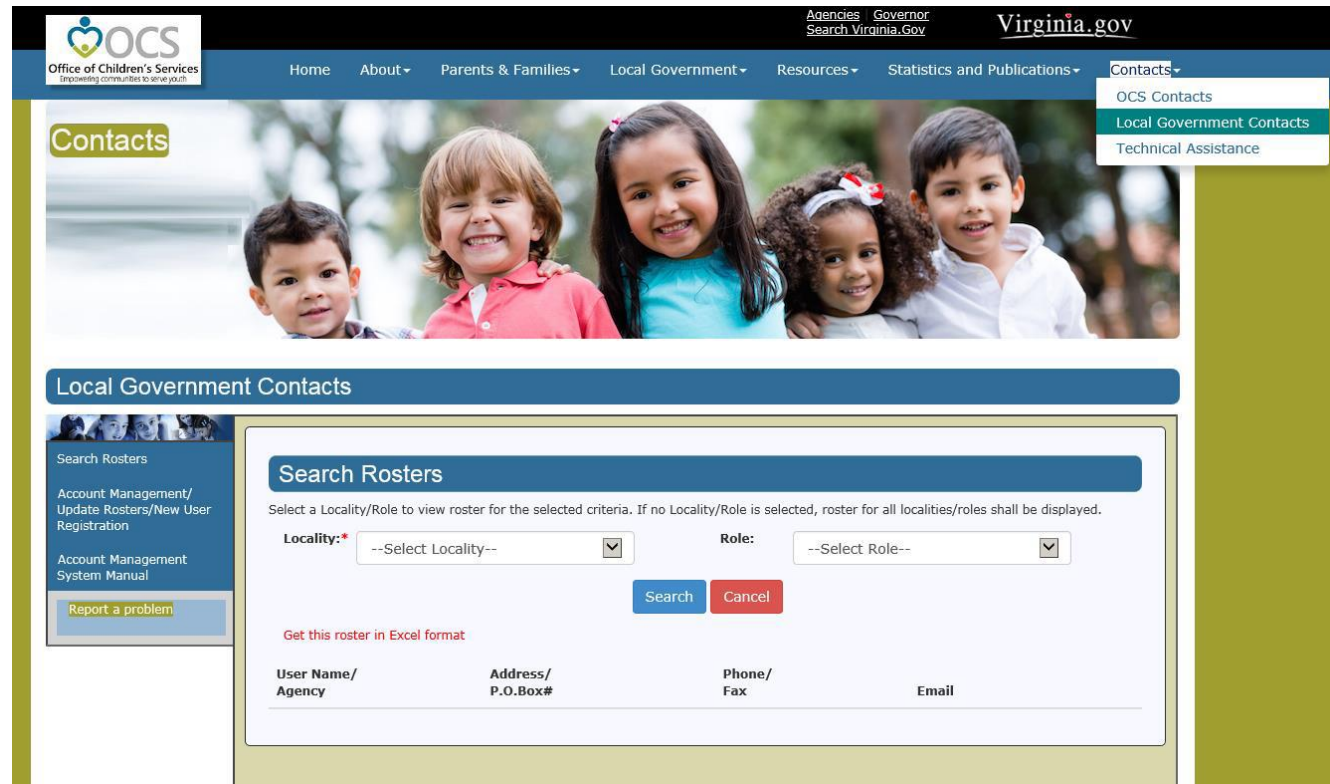# Account Management System (AMS)

Keeping the AMS Up to Date

- It is the responsibility of the locality to keep these rosters current and accurate.

- Request to make additions/deletions/changes to the directories, can be done by any individual, but these changes go through an Approval flow in the Account Management System (AMS) where the data resides

Account Management System (AMS)

AMS – Search Roster

The Local Government Contact Screen is as shown below. The Rosters section has the following features:

1. Search by Locality and/or Role

2. Sort the data displayed on the screen

3. Export the searched data (to an Excel file)

Account Management System (AMS)

AMS – Update Rosters/New User Registration

When a User clicks on the Account Management/ Update Rosters/New User Registration link on the left "rail".

Click on the "*Click here to proceed*" button.

The screen displayed is as follows. The User has three options:

1. Login to AMS (using an established e-mail address and password)
2. Create New Account
3. Reset/Forgot Password

Creating a new User account

There are two ways to create a new User account:

1. By clicking on the Create New Account button
2. Or by Login to AMS button (if you have an existing registered account)

Account Management System (AMS)

Depending on the Role requested an approval request notification is sent to either Locality's CPMT Chair or Locality's CSA Coordinator.

CPMT Chair – CSA Coordinator & Fiscal Agent

CSA Coordinator – All other roles

The Local Approver will need to login into the AMS system and approve the new User.

Account Management System (AMS)

Account Management System (AMS)

Using the Create New Account Button

When User clicks on the Create New Account button. The following screen is displayed and the User needs to enter all the required data and click on Register button.

Account Management System (AMS)

By Login to AMS Button (for users with existing registered account)

The User enters their registered email and password and clicks on Login button to log into the AMS account. User has the Register User tab, clicking on it will display the Create New Account page as shown below. The User needs to enter all the required data and click on Register button.

Account Management System (AMS)

AMS – Local Approver Screen
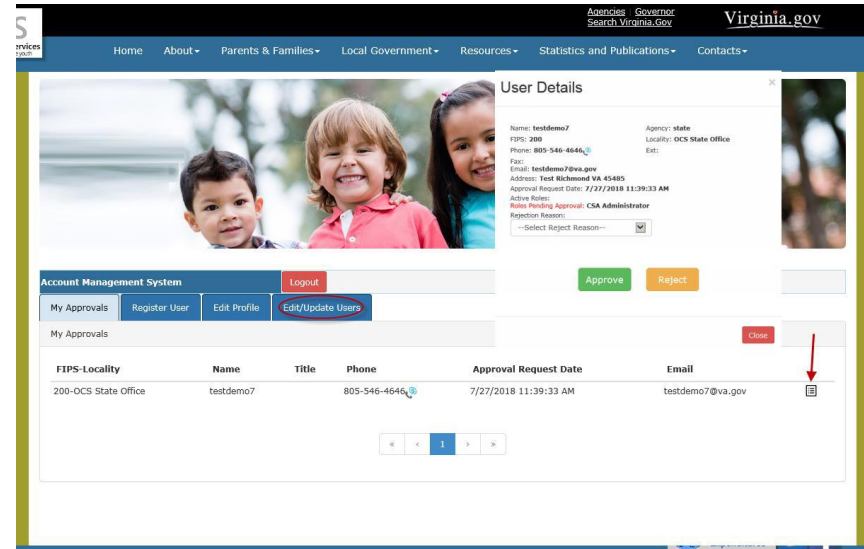
My Approvals tab

Local Approver's (CSA Coordinator and CPMT Chair) have the My Approvals tab that will display a list of Users in their approval "basket." To Approve or Reject a request the Local Approver will click on the review icon in the far right column. A popup screen to Approve or Reject the User is displayed.

When the User is approved the User will no longer appear in the Approval "basket." When the State Approver approves the User (the next step in the process), then the User will be displayed in the Local Government Contacts screen for the Locality.

The User is full approved, the User shall also receive an email notification to create his credentials to access the system.

If the User is rejected by the Local Approved or State Approver. An email is sent to the User with the Reject reason stated.

Account Management System (AMS)

Edit Profile tab

Local Approver's and established users have access to Edit Profile tab.

On this tab the User can edit or modify the user's own profile detail. After needed changes are entered, click on the Update button
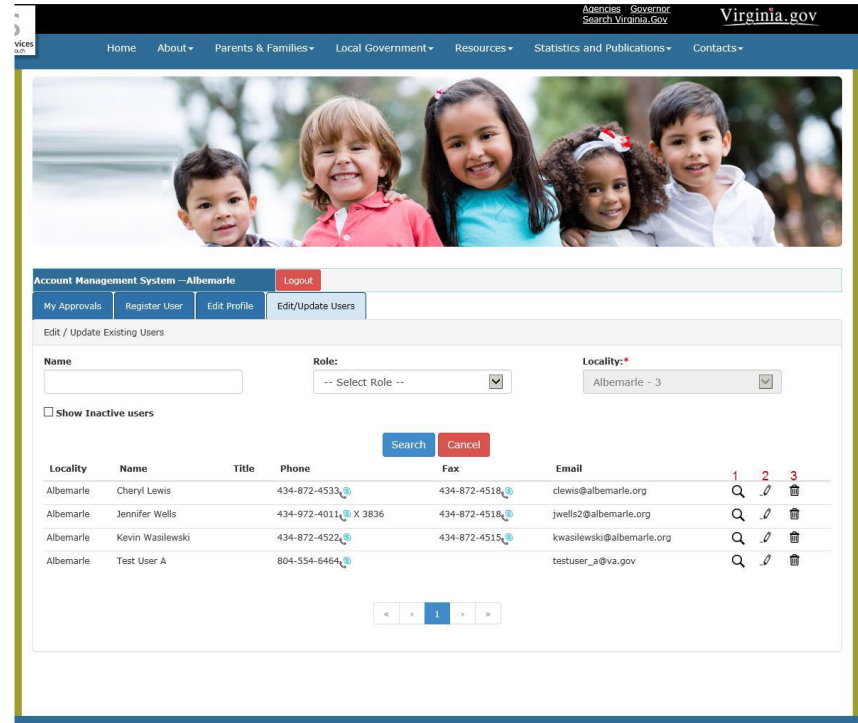
Account Management System (AMS)

Edit/Update Users tab

Local Approver's have the Edit/Update User tab.
This tab will display list of all Users in the locality.
This tab has three important features.

Account Management System (AMS)

1. The View (Magnifying Glass icon) is used to view the details of a User.

2. The Edit (Pencil icon) is used to Edit the details of a User. It can be used to:

i. Edit User Information

ii. Add User roles

iii. Delete User roles

3. The Delete (Trash Can) icon is used to Delete/Deactivate a User in the AMS. When the following message is displayed, the User will have to click on the OK button,. Once a User is

Message from webpage

You are about to deactivate this user for all registered roles, within this locality. Please note that the User can only be reactivated by starting another approval flow process. Do you want to proceed?

OK   Cancel
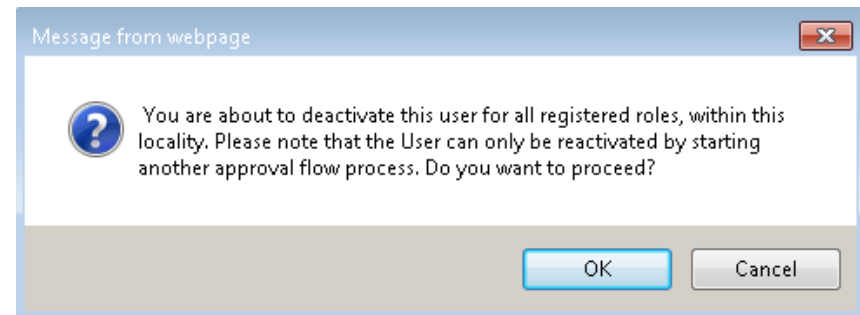
Account Management System (AMS)

User Security Questions/Password for New Users

- To establish password
- To establish security questions

Account Management System (AMS)

Reset/ Forgot Password

If you are a registered User and cannot remember your Password. Click on "Reset/Forget Password."

1. Select your Locality
2. Enter your email address
3. Click on Submit
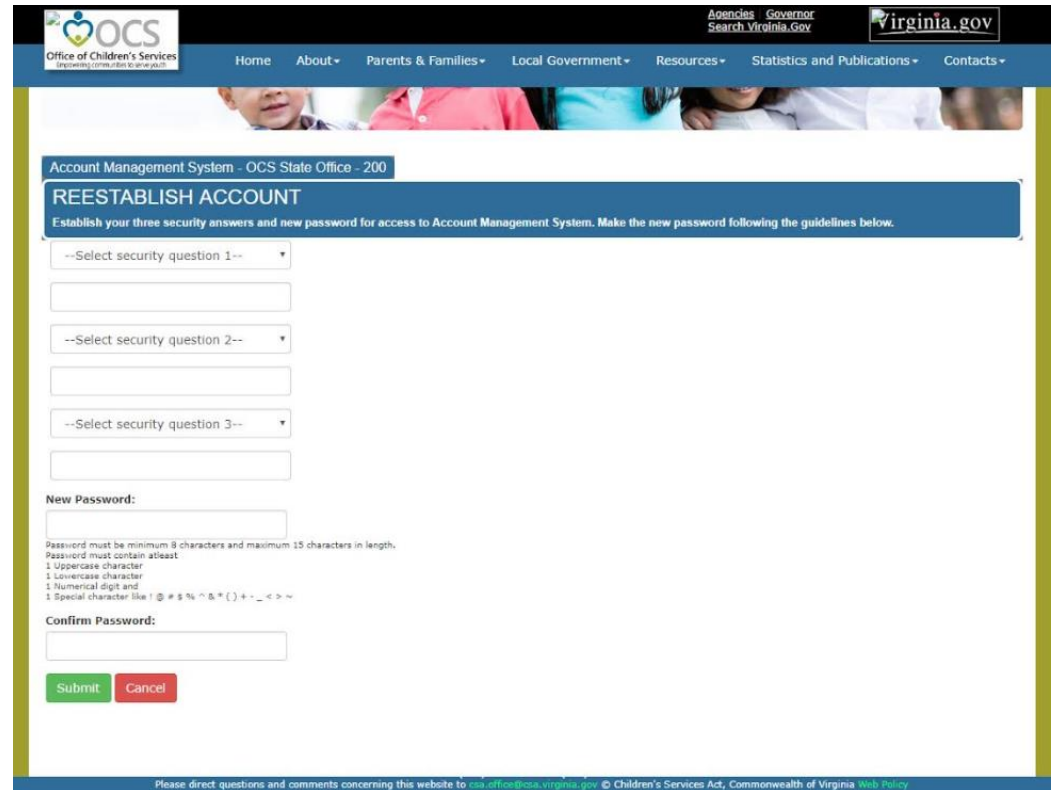
To your registered email address, an email with instructions is sent, on how to proceed.

Account Management System (AMS)

Reestablish Account

- Redo security Question / Answer
- Set new password

Local Government Reporting

- LEDRS submission

- Pool Reimbursement Approval

- Additional Supplement

- Admin Plan

- Medicaid Reports

- Other Reports

- AMS

- T4E File Transfer
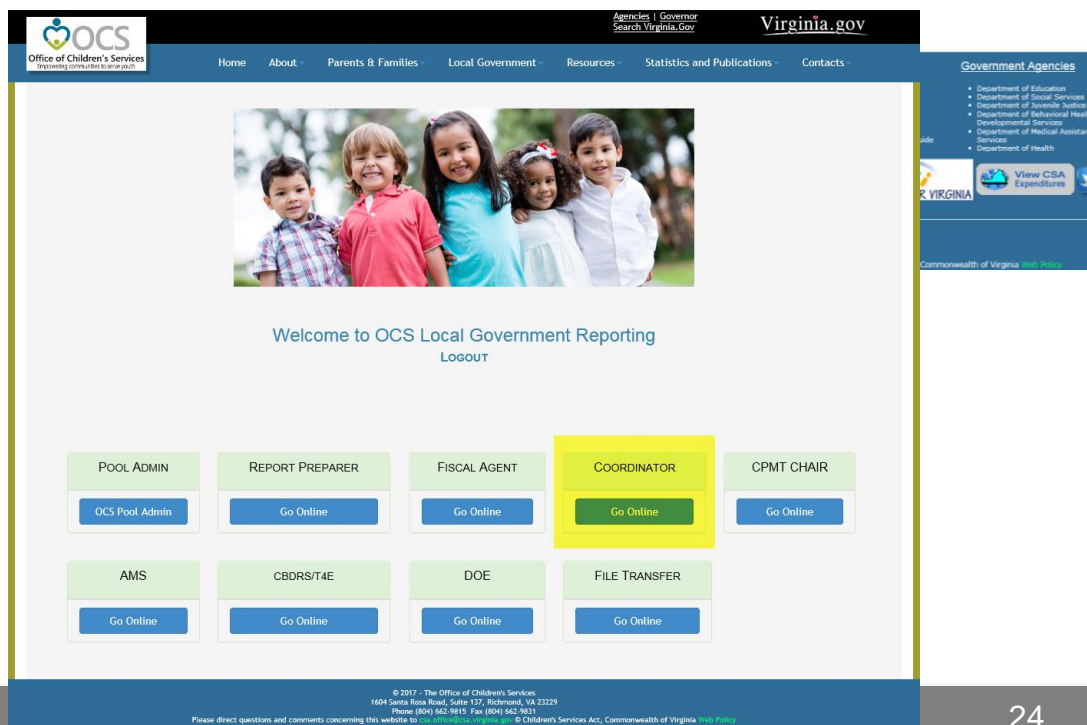
CSA Coordinator Section

- IACCT File Upload
- OCS Admin Plan
- Reports
- Export Medicaid File

Local Government Reporting

- Report Preparer

CSA Report Preparer Section

- Upload LEDRS
- Add Supplement
- Reports

CSA Report Preparer Section – Upload LEDRS

- Submit File to OCS

Local Expenditure, Data Reimbursement System (LEDRS)

File Naming Convention		
File Type	text file	…..txt
File Delimiter	| (pipe)	1| 123456789|Anna Bell|Thomas|………………….
File Naming Convention	CSA	
	CSA_Fips_Frequency_Year_Period_Report#.txt	File Name eg. ---> CSA_1_M_2016_10_1.txt
		Fips = County Fips Code (no padding of zeros)
		Frequency = M (Monthly)
		Year = Year of the file submission; calendar year
		Period = Month# of the calendar month; incase of Monthly submission
		Report# = Only ONE file submission is allowed for months 1, 2, 3, 4, 5, 6, 7, 8, 10, 11, 12. MULTIPLE File submissions are allowed in the month 9. Maximum of 3.
	Title IV-E	
	T4E_Fips_Frequency_Year_Period_Report#.txt	File Name eg. ---> T4E_1_Q_2016_1_1.txt
		Fips = County Fips Code (no padding of zeros)
		Frequency = Q (Quarterly)
		Year = Year of the file submission; calendar year
		Period = Quarter# of the reporting quarter in case of quarterly submission; Sept - 1; Dec - 2; Mar - 3; Jun - 4
		Report# = Only ONE file submission is allowed for a quarter

Crosswalk

Service Name

vs.

Service Placement Type

http://csa.virginia.gov/content/pdf/LEDRS.xlsx

Crosswalk

Expenditure Category

vs.

Service Placement Type

Crosswalk

Expenditure Category

vs.

Mandate Type

CSA Report Preparer Section – Upload LEDRS

- Browse
- Validate File

CSA Report Preparer Section – Upload LEDRS

- Upload Error

CSA Report Preparer Section – Upload LEDRS

• Upload Success

CSA Report Preparer Section – Upload LEDRS

- Upload Success

CSA Report Preparer Section – Upload LEDRS

- Submit File to OCS

CSA Report Preparer Section – Upload LEDRS

- Approve Pool Report

Local Government Reporting

- Fiscal Agent

CSA Fiscal Agent Section

- Approve Pool Report

Local Government Reporting

- File Transfer

CSA File Transfer

Statewide Statistics

Statewide Statistics – Filing Status Report

Statewide Statistics – CSA Utilization Report

Statewide Statistics – CSA Utilization Report

Statewide Statistics – CSA Utilization Report

Statewide Statistics – CSA Utilization Report

Statewide Statistics – CSA Utilization Report

Statewide Statistics – CSA Utilization Report

Statewide Statistics – CSA Utilization Report

Statewide Statistics – CSA Utilization Report

Data Security

- CSA is NOT on a private network. All communications to and from state and local is transmitted through the Commonwealth's enterprise network along with communications to and from many other state agencies.

- In order to protect the confidentiality of sensitive information (e.g. Personally Identifiable Information (PII) : Name, Address, SSN, DOB, Phone#, OASIS Id etc.) transmitted in electronic communications, it is necessary to encrypt the sensitive information prior to transmission.

- Use Microsoft File Encryption to encrypt sensitive information that will be sent over the Internet.

For more information:

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