



CCFA User Guides: User Management

This guide will assist CCFA admin users (Org Admins and CCRR Admins) on how to manage CCFA users within their organization. You must have the org admin profile in order to complete any of the below functionality, except for changing your password. Additional permissions are needed for some of the below functionality and are explained in more detail in those sections where applicable.

The below guide details how to add and manage user profiles to CCFA. User profiles comprise a list of permissions. A profile is a combination of user roles and provider locations. User profiles can be assigned to multiple users. For example, if an organization has three locations, there might be three different profiles set up to manage each location. Alternatively, there might be multiple profiles set up to manage the same function at all three locations, such as attendance or billing.

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Add New User Profile

Use this action item to create a new user profile in CCFA, which can be assigned to multiple users. Below are the steps to add a New User Profile:

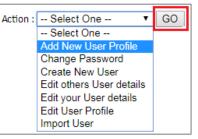
1. When logged into CCFA, click on your name in the header. You

will be brought to a page with your user account information

and associated user profiles.

- 2. From the action drop down menu on the right, select "Add New User Profile" and click "Go."
 - \checkmark Alternatively, admin users can add a new user profile through the

Admin module. To do so, select Admin + User + Add User Profile.



Child Care Financial Assistance

Welcome <u>Miranda. Reset Profile Logout</u> Org Admin for Guild of St. Agnes

Department of Early Education and Care

3. You will be brought to the Add a New User Profile page. Select the user

type and enter a User Profile Name.

Add a N	lew User Profile				
User Pro	file				
	User Type * User Profile Name *	Select One Select One Provider User Unlicensed Provider	•		
– User Ro Please se	le(s) lect the User Type for User R				
				Save	Cancel

The best practice for User Profile Name is a generic name that could be assigned to multiple users, such as:

Billing Manager; Attendance Specialist; or Attendance – CBC locations

 \circ How you name the profiles will depend on the size of your organization and the structure of staff

roles within it.

- $\,\circ\,$ It is not recommended to give profiles the same name as a user
- ✓ The available options from the User Type drop down will populate based on your organization.
- ✓ When you make a selection for the User Type, additional options will appear:
 - $\,\circ\,$ Primary Organization
 - \circ User Roles
 - $\circ\,$ See next steps for more information on these options.





Worcester

🚽 Previous Next 🔈

4. Select the Primary Organization by clicking on the binocular icon and searching.

dd a Ne	ew User Profile					
ser Prof	file					
	User Type *	Provider User	▼ Organization *	B		
	User Profile Name *	Billing Manager-Central	Primary Orgnization			
✓	Type the name	of the				
	<i>,</i> ,		Find Primary Organization			
	organization an	nd click "Search."	Name : Guild]		
√	Select the appli	icable organization	Search Cancel		Filter by:	
			Provider Name	🔺 Туре		City
	from the list.		Guild of St Agnes	CBC	129 GRANITE ST	Worcester
	nom the list.		Guild of St Agnes @ Quinsigamond School	CBC	14 BLACKSTONE RIVER RD	Worcester
			Guild of St. Agnes	ADM	405 Grove St.	Worcester
./	The recommon	dad practica is to	Guild of St. Agnes - Burncoat St.	CBC	484 BURNCOAT ST	Worcester
v	The recommen	ded practice is to	Guild of St. Agnes - Charlton Day Care	CBC	88 MASONIC HOME RD	Charlton
			Guild of St. Agnes - Early Education and Care - Devens	CBC	172 JACKSON RD	Fort Devens
			Guild of St. Agnes - Fitchburg	CBC	62 DOVER ST	Fitchburg
	select the ADM	type from the	Guild of St. Agnes - Gardner	CBC	155 GREEN ST	Gardner

CBC

336 Hamilton St.

5. Check the User Roles that apply to the new profile.

search results.

✓ The user roles are what allow the specific permissions under the User Profile (see below image)

Guild of St. Agnes @ Hamilton St.

Showing 1 to 10 of 16 entries

✓ See the Roles and Permissions Matrices under the Help menu in CCFA for details on which permissions the

below User Roles have.

✓ List includes: Family Counselor I, Billing Specialist, Attendance Specialist (Voucher Only Provider), Family

Counselor II, Attendance Billing Manager, Attendance Specialist, Org. Admin.

Add a New User Profile				
User Profile				
User Type *	Provider User	۲	Organization *	B
User Profile Name *	Billing Manager-Central		Primary Orgnization	Guild Of St. Agnes
User Role(s)				
Family Counselor I			Eamily Counselor II	Attendance Specialist
Billing Specialist			Attendance Billing Manager	OrgAdmin
Attendance Specialist (Voucher Or	nly Provider)			





6. Select the locations of care from the Sub Provider list that users with this profile will have access to.

✓ You can assign a User Profile to have access to specific locations of care

Add a New User Profile						
User Profile						
User Type *	Provider User	۲		zation *	B	
User Profile Name *	Billing Manager-Central		Primary Org	nization	Guild Of St. A	Agnes
User Role(s)						
Check All						
Family Counselor I			Family Counselor II		🗆 Atte	ndance Specialist
Billing Specialist			🗹 Atten dance Billing Manager		Org/	Admin
Attendance Specialist (Voucher Or	nly Provider)					
Sub Provider(s)						
UnCheck All						
Guild of St. Agnes (Primary Orgn	ization)					
🖉 ACEVEDO, BRENDALIX		🗹 Ad ams	s, Nikki	🗹 Alabre, Jo	osiane	
🖉 ALGARIN, MARIA		🗹 Alves,	Lori A.	🗹 Arias, Jer	nifer	
🗹 Arnold, Amber		🗹 Arrell,	Doreen	🗹 Arruda, C	Christine	

- 7. Click "Save" at the bottom of the page.
 - ✓ You will see a message if the profile was created successfully.
 - ✓ Click "Edit" to make changes to the User Profile.
 - ✓ Click "Done" to return to the User Account Information page.
 - ✓ Once created, a user profile can be assigned to multiple users.

User Profile Saved Successfully User Profile		
User Type Provider User User Profile Name Billing manager-Central	Ŧ	
User Role(s)		
Family Counselor 1	Family Counselor II	Attendance Specialist
	Attendance Billing Manager	OrgAdmin
Attendance Specialist (Voucher Only Provider)		
	Edit Done	





Change Password

Reference the <u>CCFA Training and Resources page</u> for a detailed guide and video on updating your CCFA password.

Create New User

Adding new users requires adding them to the CCFA login page (called the gateway) and then importing them into CCFA. You must have both the Org Admin profile AND have User Creator privileges on your profile in order to create new users. To request User Creator privileges, the Authorized Signatory for your organization must submit a help desk ticket with the following information: the person's username, email address, phone number, umbrella organization name, and umbrella CCFA OID. Note, there is a limit to how many users within an organization who can have the user creator role.

Follow the below steps to add users and import them into CCFA:

1. When logged into CCFA, click on your name in the header.

You will be brought to a page with your user account

information and associated user profiles.

- 2. From the action drop down menu on the right, select "Create New User" and click "Go."
 - ✓ Alternatively, admin users can add a new user through the Admin

module. To do so, select Admin + User + Add User.

3. You will be brought to the User Account Information page. Enter the user

information including:

- ✓ First Name
- ✓ Last Name
- ✓ Email Address

 $\circ\,$ Note: email addresses cannot be

assigned to more than one user or

reassigned to another user.

- ✓ Contact Number
- ✓ <u>Note</u>: There is an additional check box, User

Creator, which is an EEC managed

permission.

4. Click "Submit."

Action : -- Select One -- V GO -- Select One --Add New User Profile Change Password Create New User Edit others User details Edit your User details Edit User Profile Import User

Child Care Financial Assistance

Welcome <u>Miranda</u>. <u>Reset Profile Logout</u> Org Admin for Guild of St. Agnes

Department of Early Education and Care

	Early Childhood Education and Care						
	Single	Sign On					
Jser Administration]	[home]	[sign out]	(signed in as mrober) [Change Password]			
User Account I	nformat	ion					
First Name							
Last Name							
Email Address							
Contact Number							
User Creator:							
			Submit				





5. You will be brought to the User Summary page. This page includes the information entered on the previous page as

well as the User Name.

serSummary	
User Account Summary	
User Name: jdoe	Edit User
First Name: Jane	
Last Name: Doe	Reset Passwor
Email Address: jane_doe@exampleemail.com	
Contact Number: 617-111-1111	<u>Close</u>
User Creator: NO	
User Administrator: NO	
System Administrator: NO	
Disabled: NO	

✓ Make note of the User Name. You will need this in order to import the user into CCFA.

✓ There are additional fields that may not apply, including:

 \circ User Creator—If yes, this user can create other users within the umbrella organization.

• Note: Becoming a user creator requires the Authorized Signatory for the organization to

submit a Help Desk ticket requesting this permission be assigned to a user within their

organization. Please see the information at the start of this section for complete details.

- User Administrator—This role is managed by EEC.
- System Administrator—This role is managed by EEC.
- Disabled—If yes, the user has had their access terminated.
- ✓ There are additional links that allow the admin to complete actions for the user account, including:

o Edit User—To edit the user summary information

• Note: email addresses cannot be edited. If a user needs to use a new email account, a new

user must be set up with the changed email address.

 \circ Reset Password—To reset the password for the user





◦ Close—To exit the page

- 6. Once you have noted the username, click on the "home" link at the top of the page.
 - ✓ Note: The new user will not be able to access CCFA and will receive an exception error until the admin has

completed all the steps of importing the user and assigning at least one user profile.

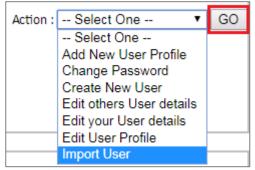
7. Click on the CCFA link.



8. You will be directed back to the home dashboard in CCFA. Click on your name.

Department of Early Education and Care Child Care Financial Assistance Welcome Miranda. Reset Profile Logout Org Admin for Guild of St. Agnes

9. From the action drop down menu, select "Import User" and click "Go."



10. A pop-up window will appear. Fill in the field with the new User Name and click "Import."

Import User		×
Import User User Name :	Jdoe	
Import Cancel		





11. You will be directed to the Import User Details page where you must assign the user a profile.

ImportUserDetails			
User Account Information First Name * Last Name * Job Title Email Address *	Jane Doe Jane_doe@Exampleemail.Com	User Name Contact Number <u>Organization Name</u> Disabled	617-111-1111
-User Profile(s) Check All			
Charlton Center Manager	Devens Cent	er Manager 📃 F	amily Counselor I
FCC North - D	ECC North -	-	CC North - G
FCC South - C	FCC South -	N F	CC Worcester
Fitchburg Center Manager	🔲 Gardner Cer	ter Manager 🔲 G	Granite Center Manager
Granite Center User	Grove Cente	r Manager 📃 G	Suild User
Guild User - Do not Use	Org Admin f	or Guild of St. Agnes	Vebster Center Manager
		Save	

- ✓ Users can have more than one profile assigned to them.
- ✓ The profiles that are relevant to your organization appear.
- ✓ There is an option to "check all"
- \checkmark Under the User Account Information at the top, you have the option to add additional user details such as job

title and organization.

✓ Note: Secondary Approver profiles are managed by EEC. To request this role, the Authorized Signatory must

either submit a help desk ticket or reach out to the Associate Commissioner for Audit Resolution and

Teacher Qualifications to request this profile.

12. Click "Save."

✓ The user will receive a temporary password to log into CCFA and will be prompted to create a new password

the first time they log in. The temporary password is valid for 24 hours.





Edit Others User Details

This action item is used to edit another CCFA user within your organization. Options include updating contact information, disabling the user, and editing or adding user profiles. See below for steps and further details:

1. When logged into CCFA, click on your name in the header.

You will be brought to a page with your user account

information and associated user profiles.

2. From the action drop down menu on the right, select "Edit Others User

Details" and click "Go."

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Welcome <u>Miranda</u>. <u>Reset Profile Logout</u> Org Admin for Guild of <u>St. Agnes</u>



3. You will be brought to a page where you can search for the user using First Name, Last Name, or Username

✓ You can search using any one or combination of the fields.

Search User	
First Name :	User Name :
Last Name :	Search Cancel

4. From the search results, click on the username to make edits to the user.

Search User					
	First Name :		<u>à</u>	User Name : Mdynan	
	Last Name :			Search Cancel]
Search Result					
User Name	First Name	Last Name	Email Address	Contact Number	Is Disabled
<u>mdynan</u>	Miranda	Dynan	miranda.roberson@mass.gov	617-988-6626	

5. The User Account Information section (highlighted with a red box below) allows you to make edits to the following:

- ✓ Contact information: Last Name, Contact Number, Organization
- ✓ Check the "Disabled" box to disable the user's access to CCFA.
 - \circ Note: All employees who no longer work in your organization need to be disabled. Please reference

the "Active Users by Org" report in General Reports to view the details of users within your

organization.

6. The Map User Profiles section (highlighted with a blue box below) allows you to add and remove profiles for the

user.

✓ Use the forward arrow to move profiles from the "all available profiles" section on the left to the "Current

profiles" section on the right. This action adds a profile to the user's account.



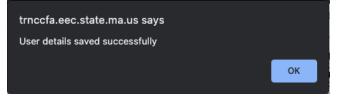


✓ Use the backward arrow to move profiles from the "current profiles" on the right to the "all available profiles"

on the left. This action removes a profile from the user's account.

User Account Information					
First Name *	Miranda	Us	ser Name	Mdynan	
Last Name *	Dynan	Contact N	Number *	617-988-6626	
Job Title		Organizati	ion Name		าี ไ
Email Address *	Miranda.Roberson@Mass.Gov		Disabled		
Map User Profiles					
Filter:					
All available profiles					Current profiles
Authorization Secondary Approver	for Guild of St. Agnes	Gardner	Center Mar	nager	Current promes
Charlton Center Manager Devens Center Manager DO NOT USE Elm Park Center Manager Family Counselor I FCC North - D FCC North - D FCC North - G FCC South - C FCC South - W FCC South - W FCC South - Web FCC Worcester Fitchburg Center Manager Granite Center Manager Granite Center Manager Gravite Center Manager Guild User Guild User Guild User Guild User - Do not Use Mercy Centre Manager Org Admin for BLACK, TRACY LEE Org Admin for BLACK, TRACY LEE Org Admin for Holmes, Emily Webster Center Manager	E	>			
				Save	Cancel
L					

7. Click "Save" to save all changes. A pop-up will notify you that all changes have been saved.







Edit Your User Details (CCRR Admin Users ONLY)

This action item is available to CCRR admins and EEC admins only. CCRR users may use this functionality to log in as a voucher only provider under their umbrella.

1. When logged into CCFA, click on your name in the header. You will be brought to a page with your user account

information and associated user profiles.

								elcome <u>Miranda</u> . <u>Reset Profile Logor</u> CCRR Admin for Child Care Circu	
Home	Intake +	Provider +	Billing +	Admin +	Reports +	Help +			
Jser Accou	nt Information							Action : Select One 🗸	GO
	First N	ame Miranda				User Nam	ne mr	ober	
	Last N	ame Roberson				Contact Numb	er 55		
	Last N Job Email Add		oberson@Mass	Mail.State.M/			er 55 ne	5-555-5555	
Associated	Last N Job	ame Roberson Title	oberson@Mass	Mail.State.M/		Contact Numb rganization Nam	er 55 ne	5-555-5555	
	Last N Job Email Add	ame Roberson Title	oberson@Mass	Mail.State.M/ Profile Type		Contact Numb rganization Nam Disable	er 55 ne ed	5-555-5555	
Profile	Last N Job Email Add User Profile(s)	ame Roberson Title	-	Profile	A.US	Contact Numberganization Nam Disable CCRR	er 55 ne ed	5-555-5555	
Profile	Last N Job Email Add User Profile(s)	ame Roberson Title Iress Miranda.Ro	-	Profile Type	CCRR Name	Contact Numberganization Nam Disable CCRR Location	er 55 ne ed	5-555-5555	
Profile CCRR	Last N Job Email Add User Profile(s) Name Admin for Child Ca	ame Roberson Title Iress Miranda.Ro are Choices of Bosto	-	Profile Type CCRR	CCRR Name Child Care Choices of Boston	Contact Number rganization Nam Disable CCRR Location Boston	er 55 ne ed	5-555-5555	



3. You will be brought to a page where you can edit your user account information and search for and assign user

profiles.

2.

User Account Information			
First Name *	Miranda	User Name	Mrober
Last Name *	Roberson	Contact Number *	555-555-5555
Job Title		Organization Name	
Email Address *	Miranda.Roberson@MassMail.	Disabled	
-Search User Profile ProfileType	CCRR User	✓ CCRRId Search	Child Care Circuit
Map User Profiles Filter: All available profiles Attendance Billing Manager CCC Intake Specialist CCCPB Admin for Child Caro Circuit		CCRR Admin for Ch	
Family Counselor II Family Counselor I ICC/Family Counselor 1 ICC/Family Counselor II Program Manager Provider Services Department	CCRR Admin for Child Care Circuit CCRR Admin for Child Care Network amily Counselor II CCRR Admin for Child Care Resources amily Counselor1 CCRR Admin for Community Care for Kids CCFamily Counselor II CCRR Admin for New England Farmworkers rogram Manager CCRR Admin for PACE/Child Care Works		





Under the "Search User Profile" Section the Profile Type of CCRR User and CCRRID for your organization will 4.

automatically be selected. Use these selections to map profiles from the available profiles box to the current profiles box (see above image).

OR

5. Change the Profile Type to Provider User and use the binoculars icon under the Primary Organization box to search

for a provider organization and associated profiles.

Search	User Profile ProfileType	Provider User	✓ Search	Primary C	Organization	
Na	ad Primary Organ me : earch Cancel	ization (Run-A-Muck				*
Fin	A row from the I d Primary Organization he : Run-A-Mu arch Cancel		l click "search.'	×		j
Pro Run- Run-	I 10 ♥ entries Ider Name Wuck Child Care Center Wuck Child Care Center	ADM	Filter by: [Address 5 HUTCHINSON DR 126 COUNTY RD 3 COLBY ST	City DANVERS Ipswich Salem		
Search User Profile	ing 1 to 3 of 3 entries	v	Primary	Previous Next Organization Run-A-N	luck Child Care Center	

7. Map the desired profile from the available profiles column to the current profiles column.

Search User Profile Provider User	✓ Pri Search	imary Organization	
Map User Profiles Filter: All available profiles Org Admin for Run-A-Muck Child Care Center		CCRR Admin for Child Care Choices of Boston CCRR Admin for Child Care Network CCRR Admin for Child Care Resources	Current profiles
✓ Click "save"			

✓ Note: the above steps are the same when searching for Unlicensed Provider profiles





Edit User Profile

This action item is used to edit the User Profile. As a reminder, profiles can be assigned to multiple users so editing a profile may impact more than one person within your organization. Edits could include changing the roles associated with the profile or changing the name of the profile. See below for steps and further details:

1. When logged into CCFA, click on your name in the header.

You will be brought to a page with your user account

information and associated user profiles.

2. From the action drop down menu on the right, select "Edit User

Profile" and click "Go."



Org Admin for Guild of St. Agnes

Action ✓ -- Select One -- O Add New User Profile Change Password 555-55: Create New User Edit others User details Edit User Profile Import User

3. A list of profiles will appear. Select a profile to edit.

Show 10 v entries				Eilten huu
ProfileName	Profile Type	CCRR Name	CCRR Location	Filter by: Primary Organization
Charlton Center Manager	CP			Guild of St. Agnes
Devens Center Manager	CP			Guild of St. Agnes
DO NOT USE	CP			Guild of St. Agnes
Elm Park Center Manager	CP			Guild of St. Agnes
Family Counselor I	CP			Guild of St. Agnes
FCC North - D	СР			Guild of St. Agnes
FCC North - F DO NOT USE	CP			Guild of St. Agnes
FCC North - G	CP			Guild of St. Agnes
FCC South - C	CP			Guild of St. Agnes
FCC South - W	CP			Guild of St. Agnes

✓ The page defaults to show 10 entries

4. You will be taken to the Edit User Profile page.

- ✓ The User Profile section (red box in image) allows you to make changes to the following:
 - \circ User Type—not recommended
 - $\,\circ\,$ User Profile Name—best practice is to give this a general name that can easily be applied to multiple

users. EEC discourages using usernames as profile names

 \circ Primary Organization—most common is for this to be set to the admin organization. Doing this gives

the profile the option to have access to more than one location of care under the admin. Changing

this allows an admin to limit a profile's access to a singular location of care if needed





✓ The User Role(s) section (green box in image) allows you to make changes to the levels of access the profile

has.

- $\,\circ\,$ Organizations can set up profiles to fulfill one or more roles within CCFA. For example, a larger
 - organization may designate a profile to do intake only (Family Counselor I and Family Counselor II
 - roles). A smaller organization may need a single profile to do both intake and attendance (Family

Counselor roles and Attendance Specialist roles (pictured).

Edit User Profile		
User Type * Provider User User Type * Provider User User Profile Name * FCC South - W	Organization * Primary Organization	🗞 Guild Of St. Agnes
- User Role(s) Check All		
□ Family Counselor I	✓ Family Counselor II	Attendance Specialist
□ Billing Specialist	Attendance Billing Manager	
Attendance Specialist (Voucher Only Provider)	Authorization Secondary Approver (EEC Managed Rol	e)
E Sub Provider(s)		
	Save Cancel	
 Reference the roles and per 	missions matrices in the Help	

menu for full details on which functionality the User Roles

have access to in CCFA.

Help +	
About	
+ Intake	
Eligibility	🔊 Guild Of St. Agnes
+ Placement	
+ Attendance	
+ Provider	Attendance Specialist
+ User	Adding a New User
Request Support	Creating a User Profile
FAQ	CCRR Roles and Permissions Matrix
Known Issues	Provider Roles and Permissions Matrix
	Voucher Only Provider Permissions

5. Expand the Sub Provider(s) section (blue box in above image) by clicking the plus sign to allow the profile access to one or more locations of care.





✓ For example, some organizations may have staff that only handle the operations of center-based care

locations while other staff handle the operations of family childcare providers.

Edit User Profile			
Jser Profile			
	vider User 🗸	Organization *	88
User Profile Name * FCC	South - W	Primary Organization	Guild Of St. Agnes
User Role(s)			
Check All			
Family Counselor I	Family Counselor II		Attendance Specialist
Billing Specialist	Attendance Billing N	lanager	□ OrgAdmin
Attendance Specialist (Voucher Only	Provider) Authorization Secon	dary Approver (EEC Managed Rol	e)
Sub Provider(s) Check All			
Check All			
Guild of St. Agnes (Primary Organi	zation)		
Abade, Marileia	CACEVEDO, BRENDALIX	C	Adams, Nikki
Alabre, Josiane	ALEGRIA, MORENA G.	C	ALGARIN, MARIA
Alves, Lori A.	Arias, Jennifer	C	Arrell, Doreen
Arruda, Christine	Avalos Sandoval, Ana	C	Baez, Yanet
BAKER, LAURA M.	Baker, Mary		Ballou, Ashley
Banks, Stacie	Barclay, Ana		Battaglia, Jane
Baxter, Tina	Beauvais, Kelly	C	Bernier, Elissa
BLACK, CATHERINE S.	BLACK, TRACY LEE	C	Blevins, Denise
Blinn, Heather	BONILLA, DELIA	C	∃Bonilla, Maria

6. Click "save" to save all changes. You will see a success message.

User Profile Saved Successfully User Profile		
User Type Provider User	~	
User Profile Name FCC South - W		
User Role(s)		
Family Counselor I	Family Counselor II	Attendance Specialist
Billing Specialist	Attendance Billing Manager	OrgAdmin
Attendance Specialist (Voucher Only Provider)	Authorization Secondary Approver	
	Edit Done	

Import User

This action item is used when creating a new CCFA user. See above section "Create New User" for more information on this action item. If you do not complete this step, the new staff person will not have access to CCFA and will receive an exception error when logging in.