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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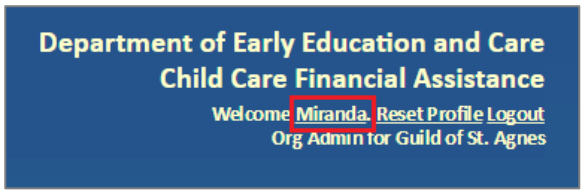
Add New User Profile

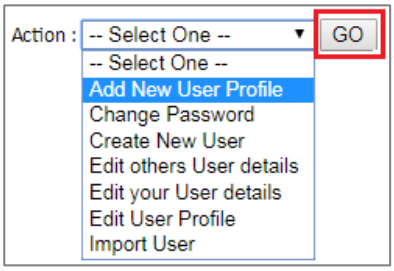
Use this action item to create a new user profile in CCFA, which can be assigned to multiple users. Below are the steps to add a New User Profile:

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.**

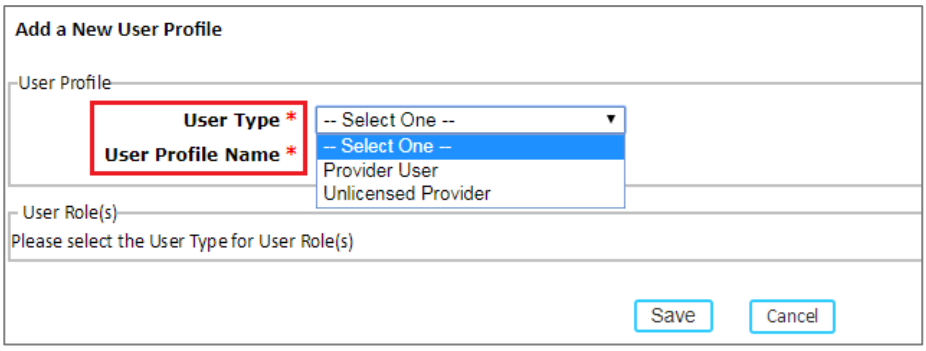


2. **From the action drop down menu on the right, select "Add New User Profile" and click "Go."**

   - ✓ Alternatively, admin users can add a new user profile through the Admin module. To do so, select Admin + User + Add User Profile.

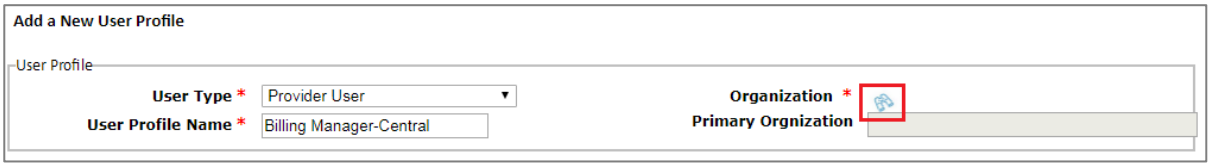


3. **You will be brought to the Add a New User Profile page. Select the user type and enter a User Profile Name.**

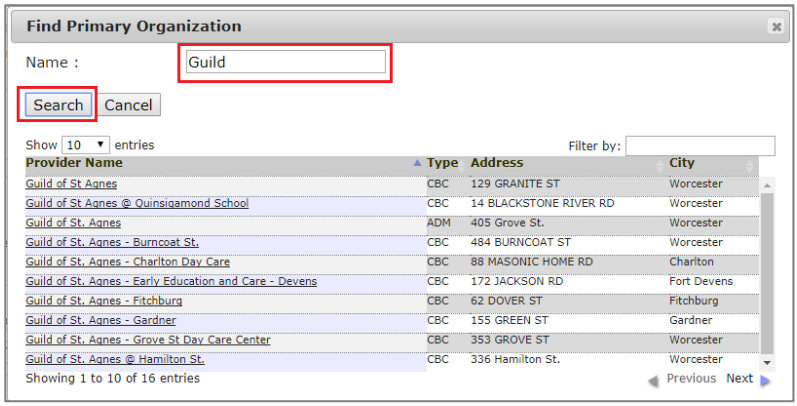


   - ✓ The best practice for User Profile Name is a generic name that could be assigned to multiple users, such as: Billing Manager; Attendance Specialist; or Attendance – CBC locations
     - How you name the profiles will depend on the size of your organization and the structure of staff roles within it.
     - 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:
     - Primary Organization
     - User Roles
     - See next steps for more information on these options.

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

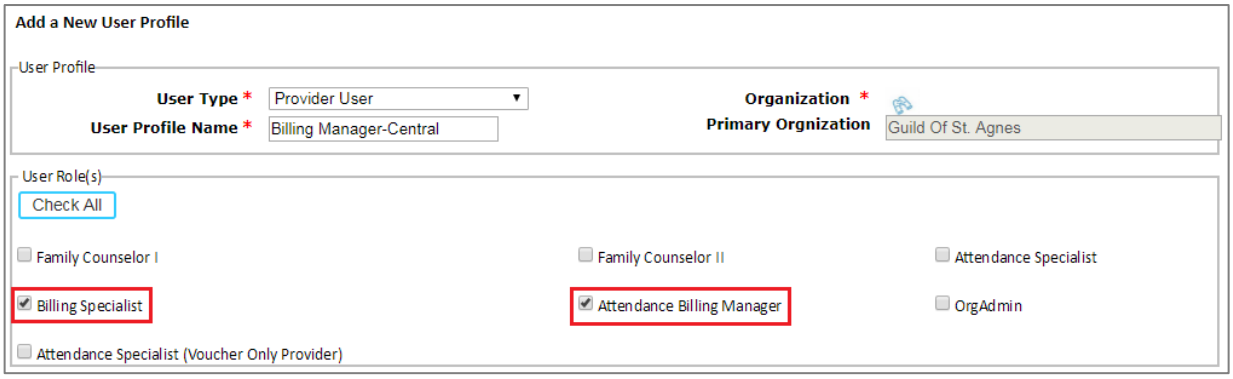


- ✓ Type the name of the organization and click "Search."
- ✓ Select the applicable organization from the list.
- ✓ The recommended practice is to select the ADM type from the search results.



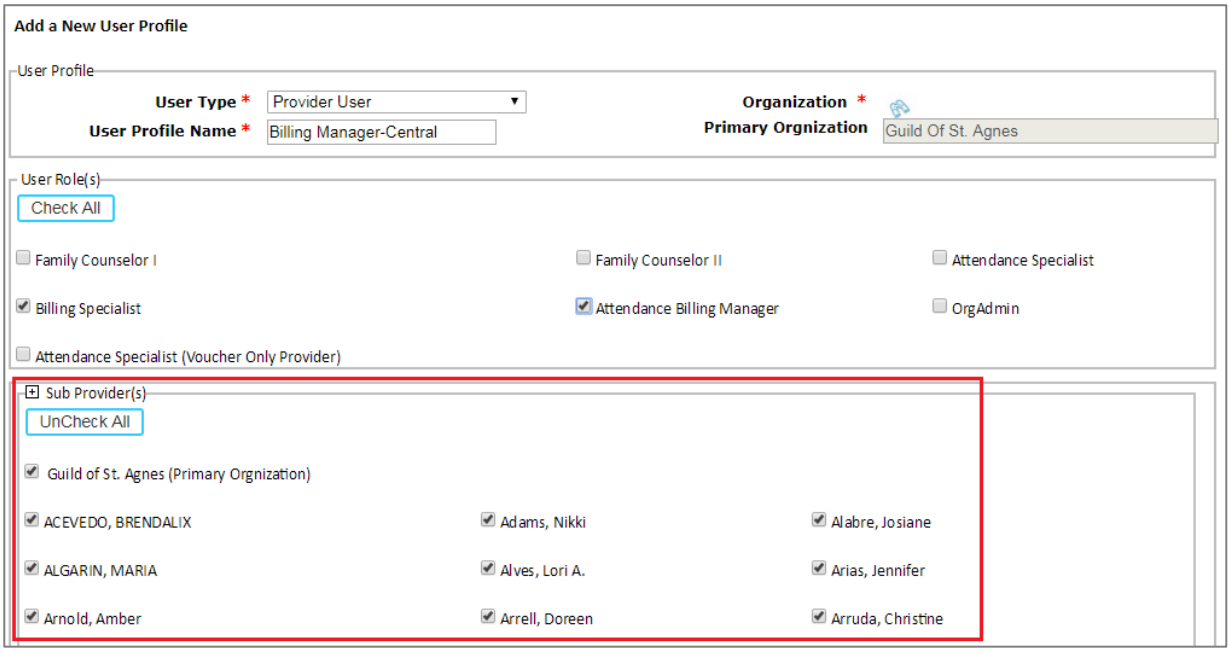
5. Check the User Roles that apply to the new profile.

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



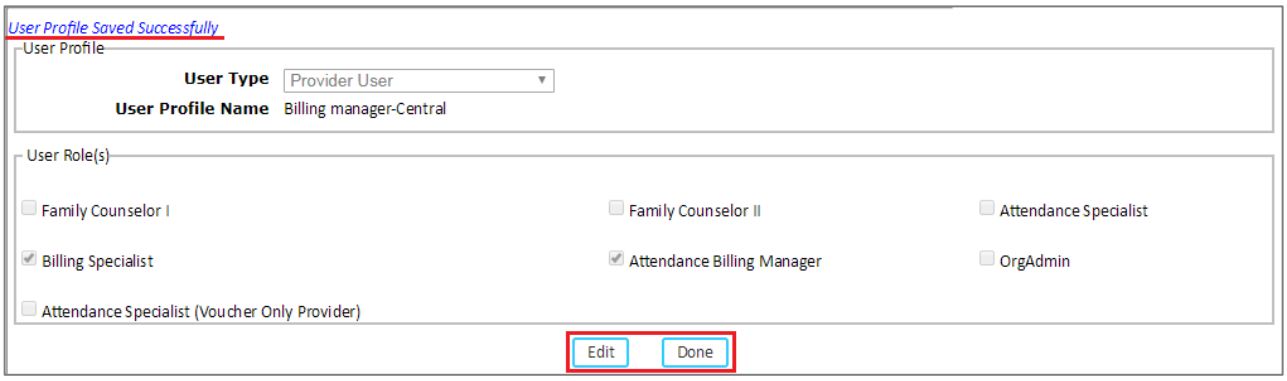
6. Select the locations of care from the Sub Provider list that users with this profile will have access to.

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



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.



Change Password

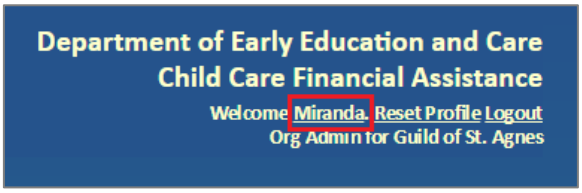
Reference the [CCFA Training and Resources page](#) for a detailed guide and video on updating your CCFA password.

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.

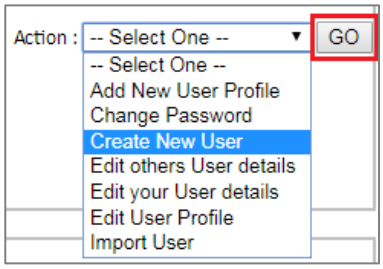
Follow the below steps to add users and import them into CCFA:

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.**



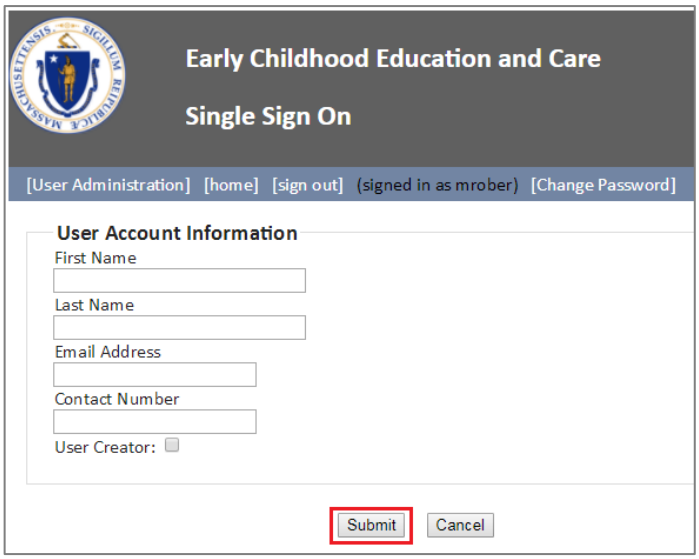
2. **From the action drop down menu on the right, select "Create New User" and click "Go."**

   - ✓ Alternatively, admin users can add a new user through the Admin module. To do so, select Admin + User + Add User.



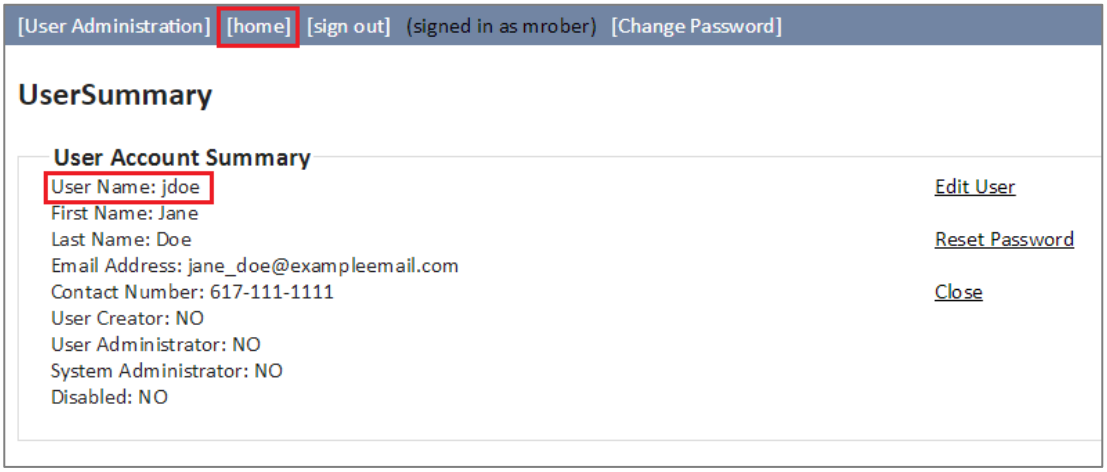
3. **You will be brought to the User Account Information page. Enter the user information including:**

   - ✓ First Name
   - ✓ Last Name
   - ✓ Email Address
     - Note: email addresses cannot be assigned to more than one user or reassigned to another user.
   - ✓ Contact Number
   - ✓ Note: There is an additional check box, User Creator, which is an EEC managed permission.



4. **Click "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.**



- ✓ 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:
  - 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:
  - 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.
  - Reset Password—To reset the password for the user

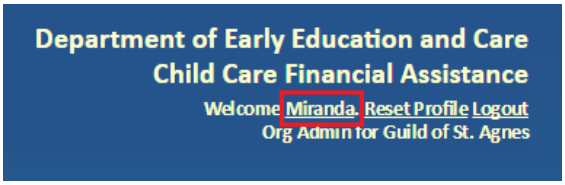
- Close—To exit the page

6. **Once you have noted the username, click on the "home" link at the top of the page.**

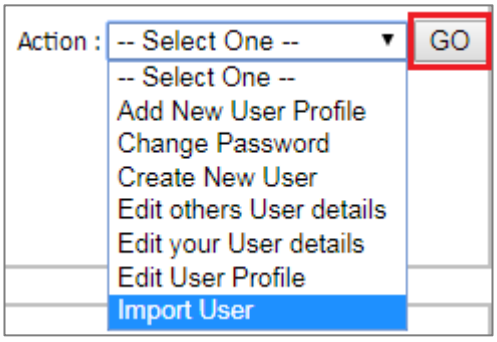
   ✓ **Note: The new user will not be able to access CCFA and will receive an exception error until the admin has completed all the steps of importing the user and assigning at least one user profile.**

7. **Click on the CCFA link.**

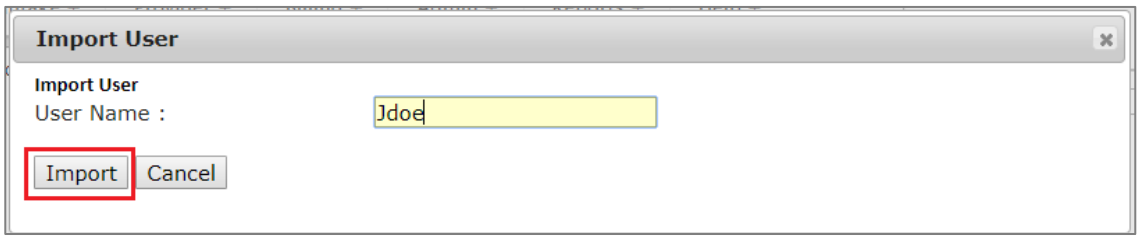
8. **You will be directed back to the home dashboard in CCFA. Click on your name.**



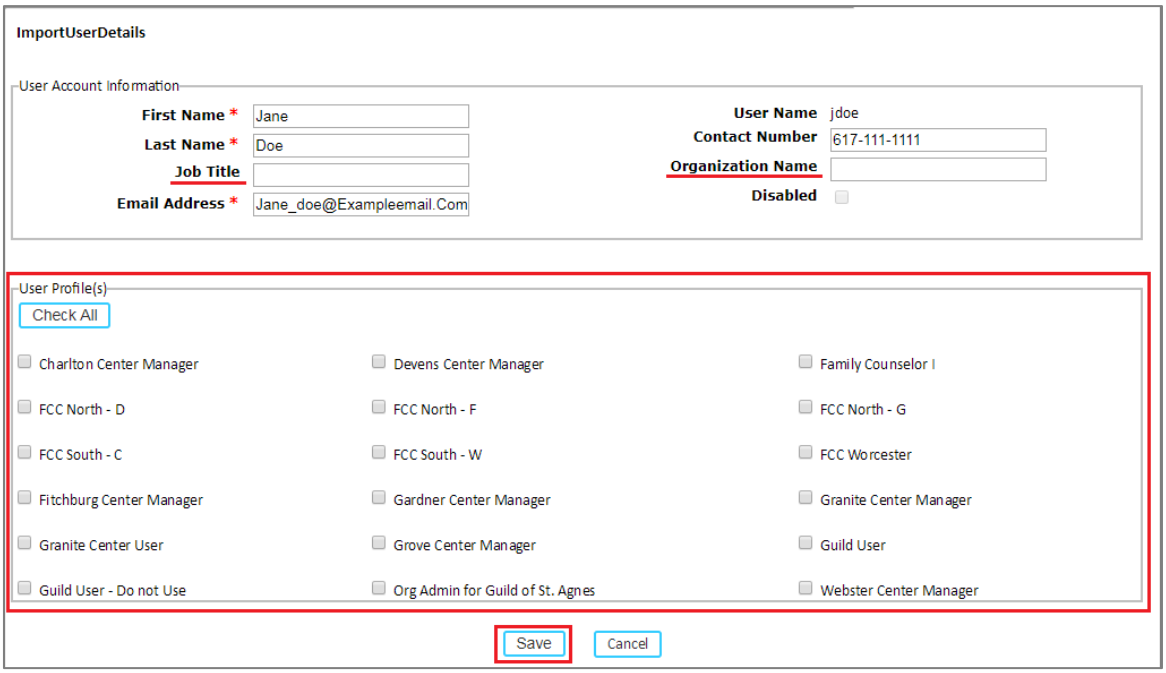
9. **From the action drop down menu, select "Import User" and click "Go."**



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



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



- ✓ 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"
- ✓ 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.**

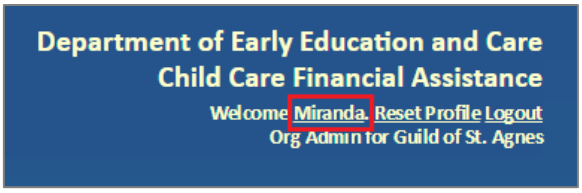
12. Click "Save."

- ✓ 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.

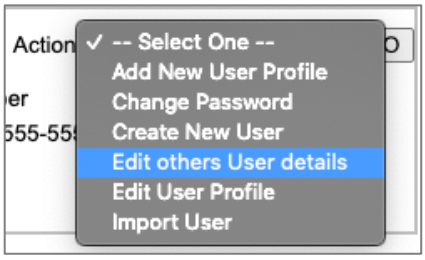
Edit Others User Details

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.**

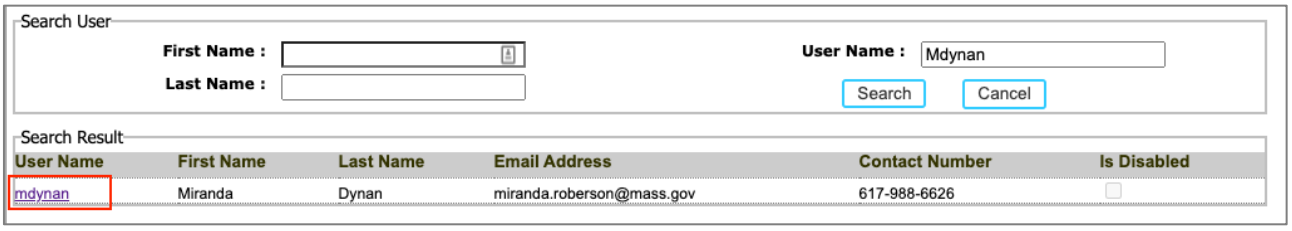


2. **From the action drop down menu on the right, select "Edit Others User Details" and click "Go."**



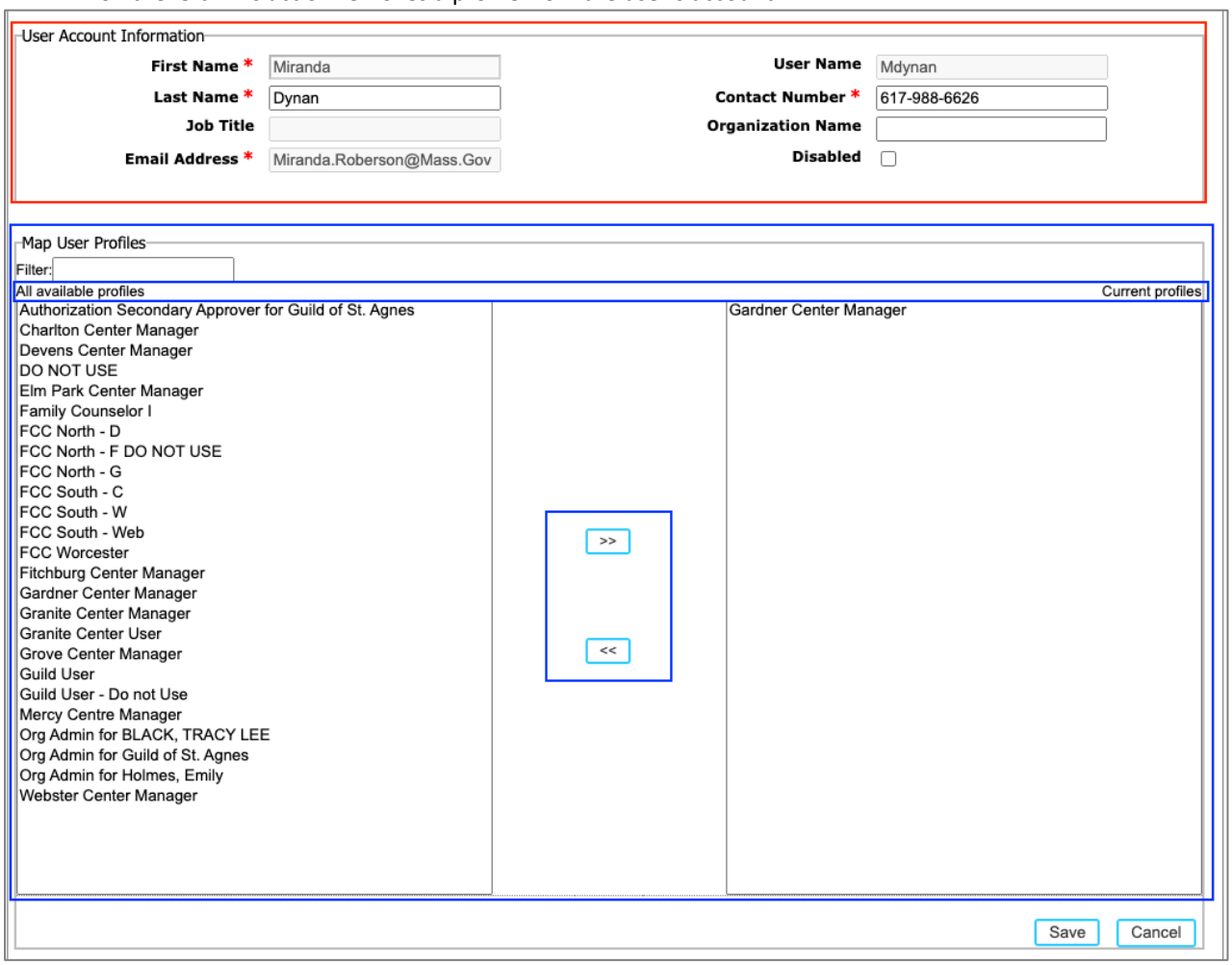
3. **You will be brought to a page where you can search for the user using First Name, Last Name, or Username**
   - ✓ You can search using any one or combination of the fields.

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

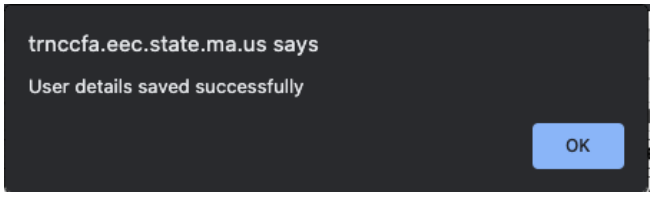


5. **The User Account Information section (highlighted with a red box below) allows you to make edits to the following:**
   - ✓ Contact information: Last Name, Contact Number, Organization
   - ✓ Check the "Disabled" box to disable the user's access to CCFA.
     - Note: All employees who no longer 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.



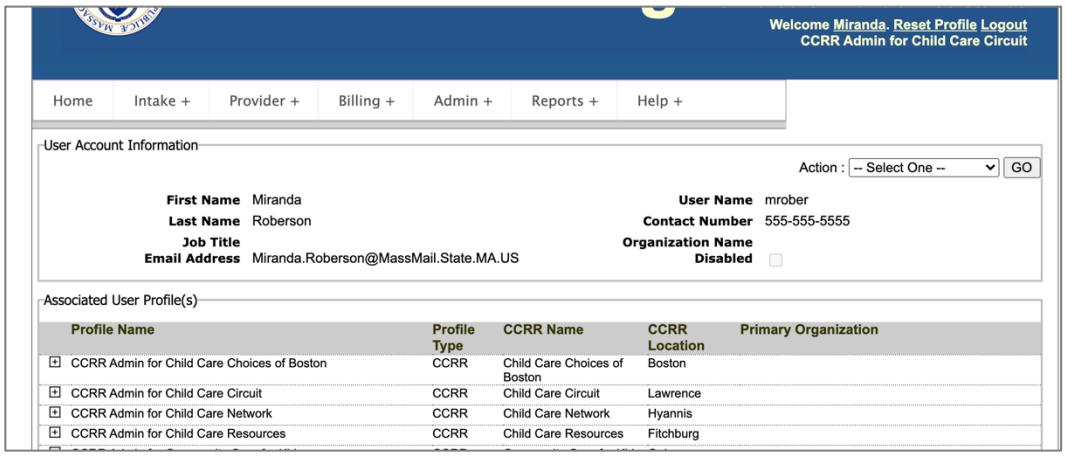
7. Click "Save" to save all changes. A pop-up will notify you that all changes have been saved.



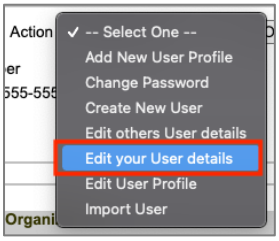
Edit Your User Details (CCRR Admin Users ONLY)

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.

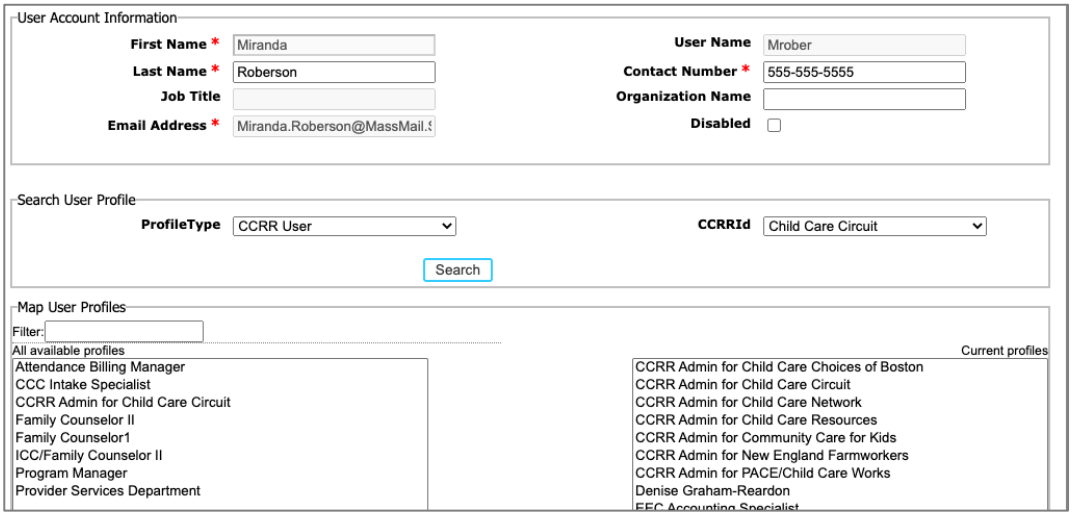
1. **When logged into CCFA, click on your name in the header. You will be brought to a page with your user account information and associated user profiles.**



2. **From the action drop down menu on the right, select "Edit Your User Details" and click "Go."**



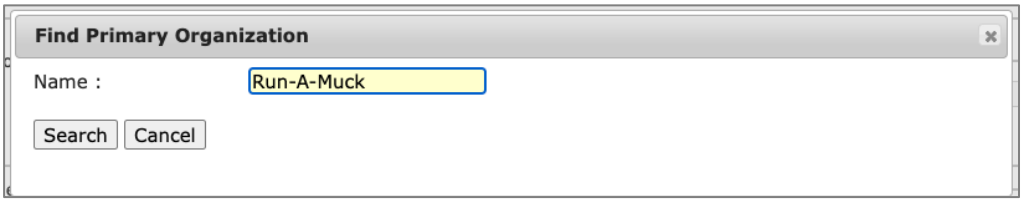
3. **You will be brought to a page where you can edit your user account information and search for and assign user profiles.**



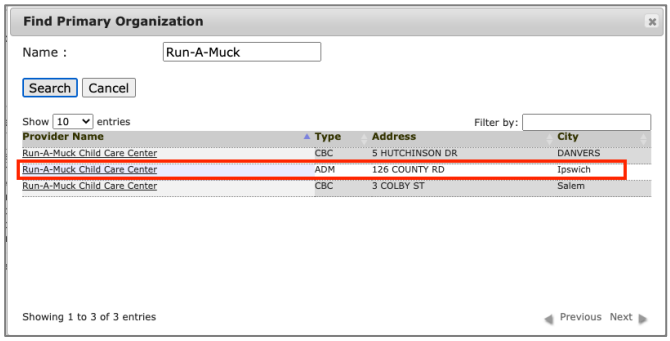
4. **Under the "Search User Profile" Section the Profile Type of CCRR User and CCRRID for your organization will automatically be selected. Use these selections to map profiles from the available profiles box to the current profiles box (see above image).**

OR

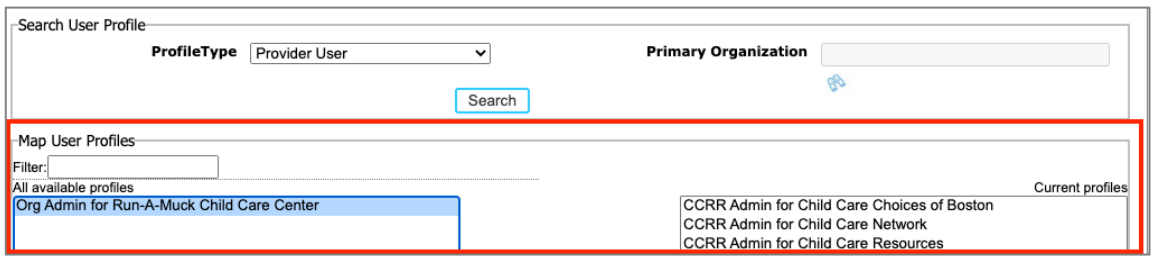
5. **Change the Profile Type to Provider User and use the binoculars icon under the Primary Organization box to search for a provider organization and associated profiles.**



6. **Select the ADM row from the result set and click "search."**



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

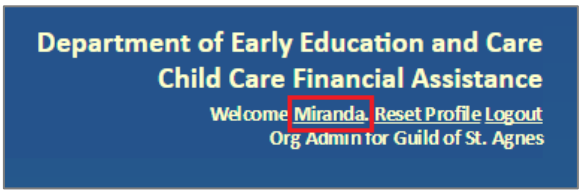


- ✓ Click "save"
- ✓ Note: the above steps are the same when searching for Unlicensed Provider profiles

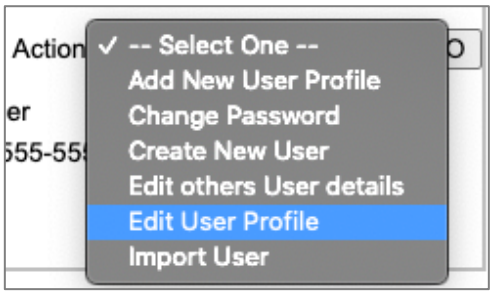
Edit User Profile

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.**

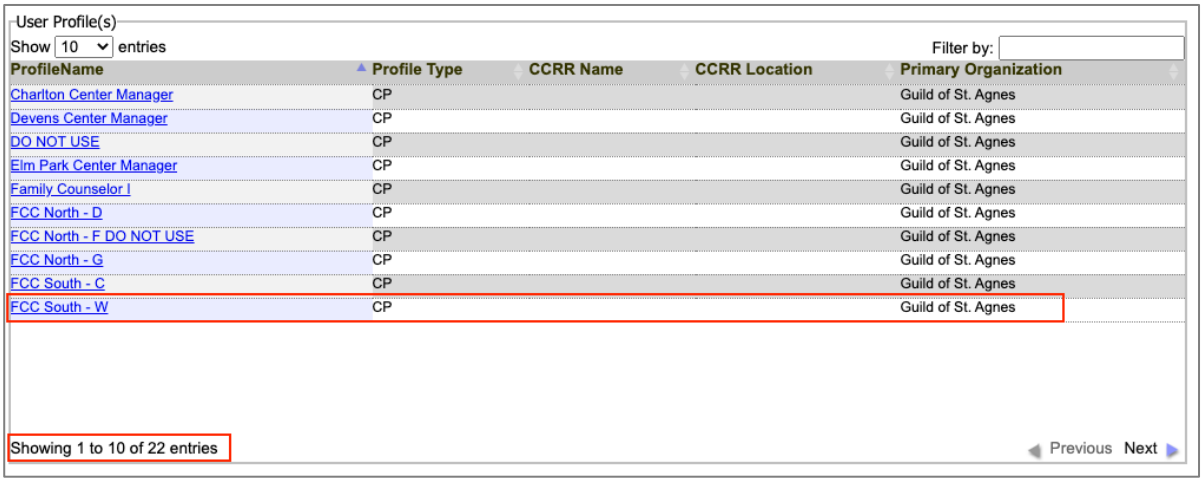


2. **From the action drop down menu on the right, select "Edit User Profile" and click "Go."**



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

   - ✓ The page defaults to show 10 entries



User Profile(s)

Show 10 entries — Filter by:

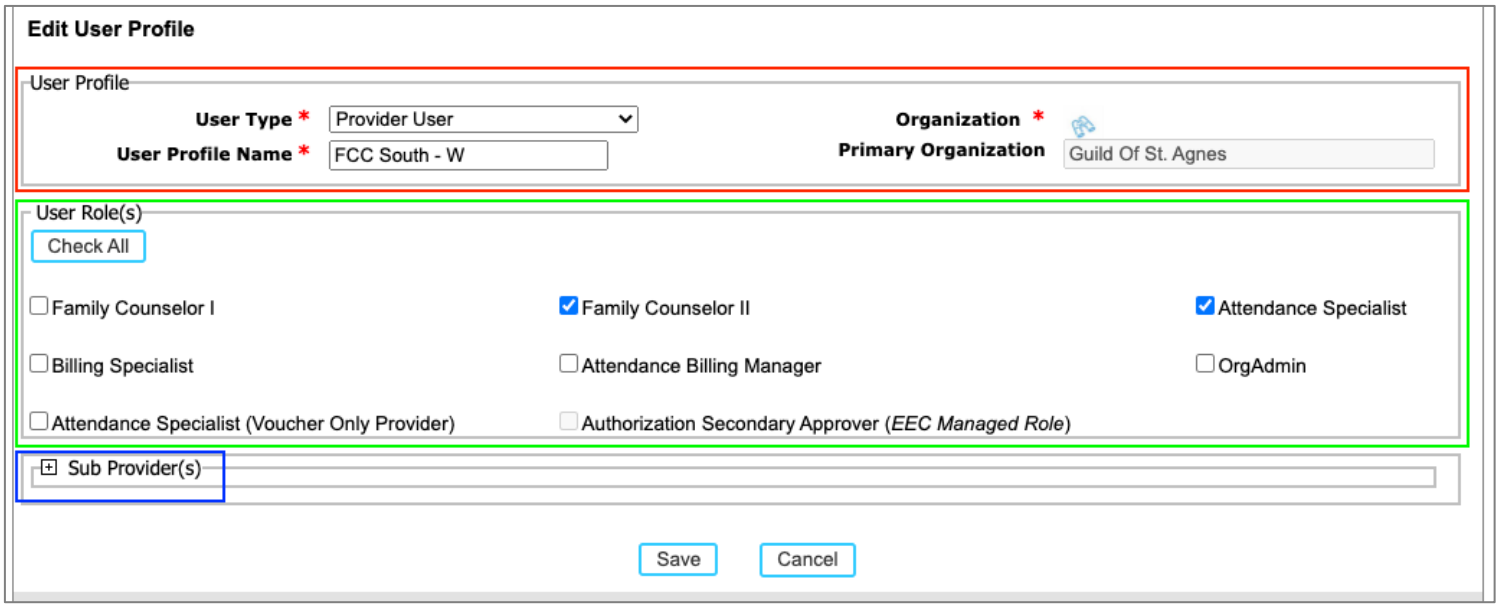
ProfileName	Profile Type	CCRR Name	CCRR Location	Primary Organization
Charlton Center Manager	CP			Guild of St. Agnes
Devens Center Manager	CP			Guild of St. Agnes
DO NOT USE	CP			Guild of St. Agnes
Elm Park Center Manager	CP			Guild of St. Agnes
Family Counselor I	CP			Guild of St. Agnes
FCC North - D	CP			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

Showing 1 to 10 of 22 entries — Previous Next

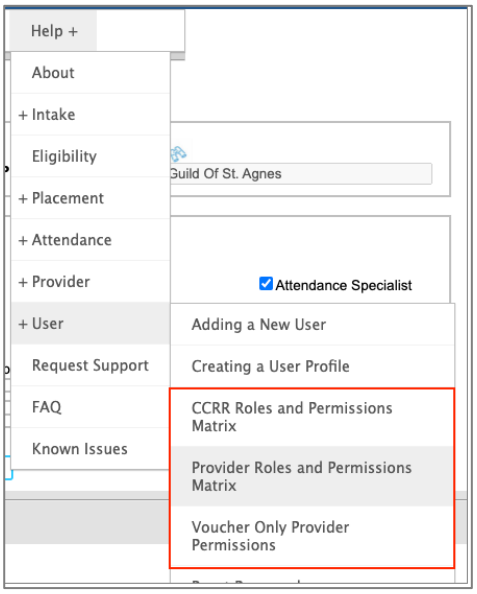
4. **You will be taken to the Edit User Profile page.**

   - ✓ The User Profile section (red box in image) allows you to make changes to the following:
     - User Type—not recommended
     - 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
     - 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.
  - 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).

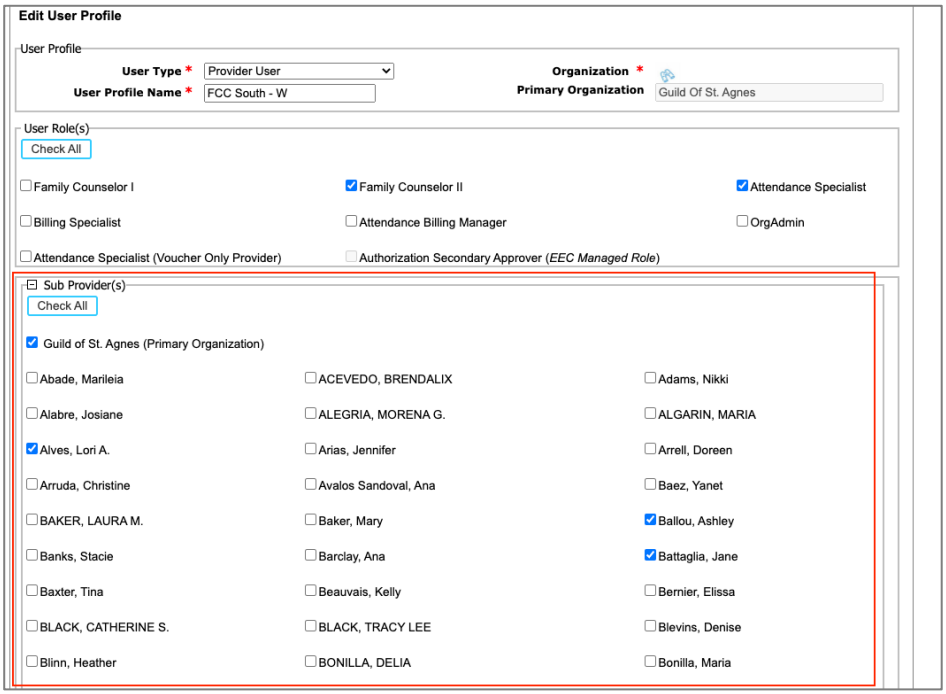


- ✓ Reference the roles and permissions matrices in the Help menu for full details on which functionality the User Roles have access to in CCFA.

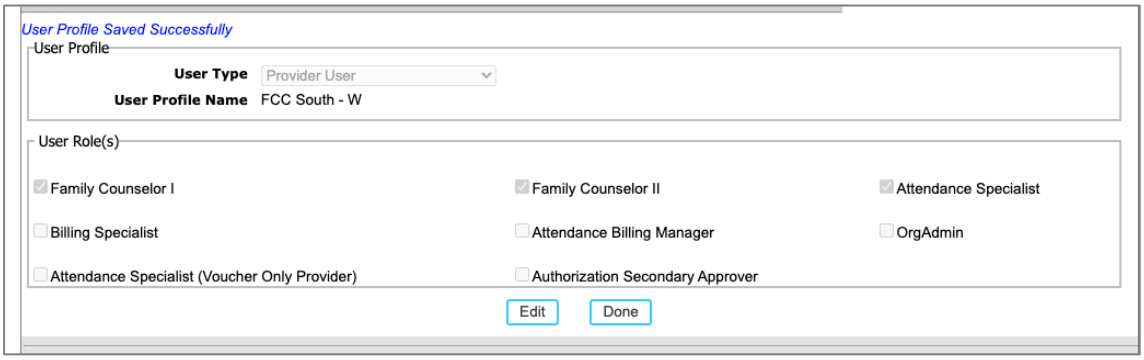


5. **Expand the Sub Provider(s) section (blue box in above image) by clicking the plus sign to allow the profile access to one or more locations of care.**

- ✓ 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.



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



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.