

Guide to add / remove Role(s) for an existing User

Only available for CPMT Chair and CSA Coordinator

If a User is not seen on the CSA Contact / Roster then that User was deactivated, either by the locality or by system (if the User has NOT logged in to the system for a year).


To re-activate the existing Users who are no longer seen on the CSA Roster

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.

The screenshot shows the 'Account Management System - OCS State Office (200)' interface. The 'Edit / Update Existing Users' tab is active. The form includes fields for Agency/Locality/System (Albemarle - 3), Name, Address, ZipCode, Role (-- Select Role --), City, and Email. Below the form is a checkbox for 'Show deleted/deactivated users' and an 'Export' button. A search bar with 'Search' and 'Reset' buttons is present. The table below lists users with columns for Agency/Locality/Provider, Name, Phone, and Email. Red numbers 1, 2, and 3 are placed above the search, edit, and delete icons in the table respectively.

Agency/Locality/Provider	Name	Phone	Email	1	2	3
Albemarle (003)	Jennifer Wells	434-972-4011 X 3836	jwells2@albemarle.org	🔍	✎	🗑️
Albemarle (003)	Kevin Wasilewski	434-872-4522	kwasilewski@albemarle.org	🔍	✎	🗑️
Albemarle (003)	Neta Davis	434-972-1800	NETA.DAVIS@regionten.org	🔍	✎	🗑️
Albemarle (003)	Tammy Critzer	434-872-4531	tcritzer@albemarle.org	🔍	✎	🗑️

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Account Management System - OCS State Office (200) Logout

[My Approvals](#) [Register User](#) [Edit Profile](#) [Edit/Update Users](#) [Activate Users](#) [Approver ToolKit](#) [SFD Admin](#)

Edit / Update Existing Users

Agency/Locality /System:* **Role:**

Name: **City:**

Address: **Email:**

ZipCode:


Show deleted/deactivated users

Export
Search
Reset

Agency/Locality/Provider	Name	Phone	Email	
Washington (191)	Jeffrey Justice	276-645-7450	jeffrey.justice@dss.virginia.gov	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Washington (191)	Regina Kinder	276-971-2674	rkinder@highlandscsb.org	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Washington (191)	Shelia Tuggle	276-525-1584	stuggle@highlandscsb.org	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Washington (191)	Teresa Caudell	276-645-5041	teresa.caudell@dss.virginia.gov	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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

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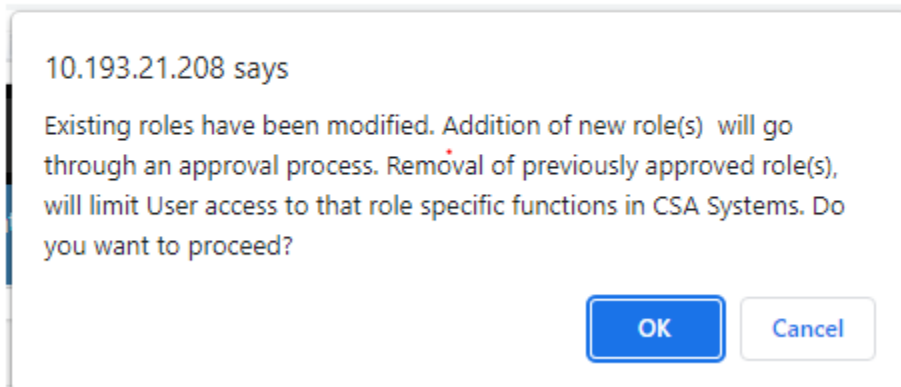

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Position: Director
Phone:* 276-645-7450
Ext:
Fax:
Email:* jeffrey.justice@dss.virginia.gov
Address Line 1:* 621 Washington Street
Address Line 2:
P.O.Box#:
City:* Bristol
State:* Virginia
Zip Code:* 24201
Zip Ext:
Role:* CPMT Chair, Report Preparer, T4E - File Uploader

DSU/RA
 CPMT Chair
 CSA Coordinator
 Report Preparer
 T4E - File Uploader
 Fiscal Agent
 CBDRS CSA - Preparer
 CBDRS T4E - Preparer

For questions regarding this website, please visit [this page](#). © Children's Services Act, Commonwealth of Virginia [Web Policy](#)

- a. Scroll down and add User roles by clicking on the check box beside the Role label
- b. **Check** mark all **roles needed**
- c. **Uncheck** all roles that need to be **removed**
- d. Click outside the Role Box
- e. Click on the Update button
- f. The following pop-up box is displayed



- g. Click on OK button
6. Approval notification email is sent to Locality's CSA Coordinator or CPMT Chair depending on the Role.
7. The CSA Coordinator or CPMT Chair now Click on My Approvals tab
8. Click on the Review (Notes icon)
9. On the popup screen click on the Approve Button

