

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.

The screenshot displays the 'Account Management System - OCS State Office (200)' interface. The 'Edit/Update Users' tab is selected, and a red arrow points to it. The form includes fields for Agency/Locality/System (Washington - 191), Name, Address, ZipCode, Role, City, and Email. A red arrow points to the Role dropdown menu. Below the form is a checkbox for 'Show deleted/deactivated users', an 'Export' button, and 'Search' and 'Reset' buttons. A table lists four users with columns for Agency/Locality/Provider, Name, Phone, Email, and a set of action icons (search, edit, delete, etc.). A red arrow points to the action icons for the first user.

Agency/Locality/Provider	Name	Phone	Email	
Washington (191)	Jeffrey Justice	276-645-7450	jeffrey.justice@dss.virginia.gov	🔍 ✎ 🗑️ 🔑 📄
Washington (191)	Regina Kinder	276-971-2674	rkinder@highlandscsb.org	🔍 ✎ 🗑️ 🔑 📄
Washington (191)	Shelia Tuggle	276-525-1584	stuggle@highlandscsb.org	🔍 ✎ 🗑️ 🔑 📄
Washington (191)	Teresa Caudell	276-645-5041	teresa.caudell@dss.virginia.gov	🔍 ✎ 🗑️ 🔑 📄

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

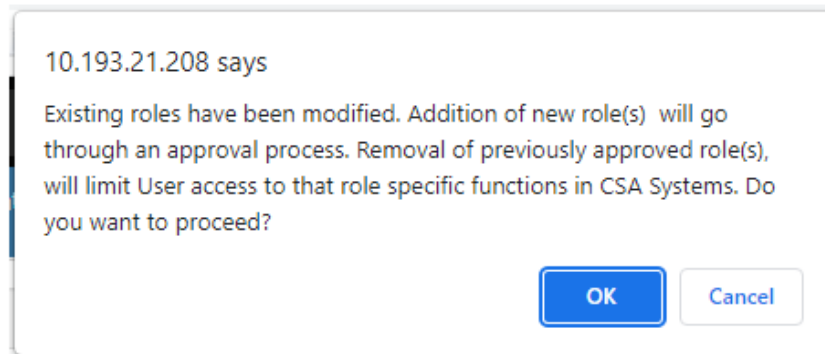
The screenshot shows the 'Edit User' form in the OCS system. The form contains the following fields and values:

- Agency: County of Accomack
- Position: (empty)
- Phone: 757-787-5737
- Ext: (empty)
- Fax: 757-787-2468
- Email: aford@co.accomack.va.us
- Address Line 1: 23296 Courthouse Ave
- Address Line 2: (empty)
- P.O.Box#: 620
- City: Accomac
- State: Virginia
- Zip Code: 23301
- Zip Ext: (empty)
- Role: Fiscal Agent

A red arrow points from the 'Update' button to the 'Role' dropdown menu, which is open and showing a list of roles with checkboxes:

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

- Change the all fields that needs to be changed
- 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.
- Click on the Update button
- The following pop-up box is displayed



- Click on OK button

Please Note: 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

