Department of Youth & Community Development

PARTICIPANT TRACKING SYSTEM: COMPASS Managing Team Members

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Key Terms

Roles: Your DYCD Connect account role determines how much data you have access to and the tasks you may undertake. The level of your account role, within the three-tier hierarchy, is set by your CBO during account creation. (See definitions below and screenshot labeled 'Breakdown of Team Member Access' further down).

PTS/EMS	Hover here for	1
Roles: 6	more info	_
CBO Admin CBO Case Us	ser	1
CBO Program	1 Director	
		-
Only one role can I	be selected for CRM application	

NOTE: To modify the role of an existing account holder, a Technical Assistance Help Request must be submitted through the DYCD Connect Help Center.

CBO Case User:Denotes a low-level user, someone typically tasked with data entry.Case Users can edit workscopes but cannot submit them. Nor can they
submit an "unlock request" or access evaluations or action plans.

- **CBO Program Director:** Denotes a mid-level user, who performs *all basic functions* within DYCD Connect. The CBO Program Director user role is not necessarily undertaken by the On-Site Program Director, and there may be multiple Program Director users with access to the same contract in PTS.
- **CBO Provider Admin:** Denotes a high-level user with authority to perform all functions designated for CBOs within DYCD Connect. The person in this role manages access to workscopes and evaluations for all users within the CBO. CBO Provider Admin level users have to be approved by DYCD.



Who are Team Members?

Team Members are staff with a DYCD Connect account who have been given access to a specific workscope by a CBO Provider Admin user within the provider organization. Users can only perform actions within their designated Role. You can find a list of all Team Members in your workscope by navigating to General>Team Members.

How do I Add or Remove Team Members?

It is primarily the responsibility of CBO Provider Admin-level users to manage which agency staff access DYCD Connect.

Step 1: After logging in to PTS/EMS, click the down arrow next to 'Main Menu' at the top. Click 'My Profile' followed by the name or your CBO on the following page.

Department of Youth & Community Development	Main CONNECT	Menu My Profile >	
Main Menu	Training		
Dashboards	Intake	Bvaluations	Contracts
Workscopes		Incident Reports	My Profile 2
Reports		CAPs	
		Performance Evaluations	

You can also go direct to the provider page from the header of your workscope.

Click on you quick	Click on your Provider Name from a page Header to quickly navigate to the Provider Portal				
100020-COMPASS Elementary-7/1/2017-8/31/2017	Provider	Program Site	Program Period		
	Development Center	P.S. 9	7/1/2017 - 8/31/2017		



Step 2: A new page with information about your CBO and its DYCD contracts will open. Using the left-hand switchboard, click "USERS" to find the 'Provider Users' table. This contains the full list of names of all users registered by your CBO.

Step 3: Click the name of the user whose access you wish to modify.

Provider Users CBO1		
Full Name 🔺 Email	÷	Roles
DYCD ProviderAdmin01 Click on t	he name of an	user r Admin
DYCD ProviderAdmin02	their profile pa	age er Admin

Step 4: Click "Save" to complete your changes. If you want to grant or remove access to an evaluation, go to 'Evaluation Access' and follow the same steps.

Deve	elopment Center	Utilize the search bar to narrow your results. You						
Image: Provider Users Provider Program Director 16 ×								
Provider Program Director 16 Provider Program Director								
	Workscope ¢	Status	¢	Program Site 👙	Program Type	Period Type 🗘	Start Date 💌	End Date 🗘
	126019-COMPASS Elementary-9/1/2017-6/30/2018	Released		Recreation Center	COMPASS Elementary	School Year	9/1/2017	6/30/2018
	142116-COMPASS Middle School-9/1/2017-6/30/2018	Submitted		lafayette St	COMPASS Middle School	School Year	9/1/2017	6/30/2018
	124104A-COMPASS Elementary-7/1/2018-8/31/2018	Released		Juvenile Center	COMPASS Elementary	Summer Year	7/1/2018	8/31/2018
	126019-COMPASS Elementary-7/1/2017-8/31/2017	Released		Recreation Center	COMPASS Elementary	Summer Year	7/1/2017	8/31/2017
	142116-COMPASS Middle School-7/1/2017-8/31/2017	Released		lafayette St	COMPASS Middle School	Summer Year	7/1/2017	8/31/2017
Check and uncheck the boxes next to each 1-10 of workscope to assign or remove access for this user								

NOTE: Staff assigned the role of Case User cannot view evaluations or action plans and cannot be granted access to evaluations. To change a user's account role, you must contact the <u>DYCD</u> <u>Connect Help Center</u>.





Breakdown of Team Member Access

Ability to 'Complete' a task refers to preparation of a document online. In many cases, any user, regardless of level, may do this. However, *only higher-level users can 'Submit' the completed document.* This is to ensure that a staff member in an appropriately senior position reviews and approves the document prior to its submission to DYCD.





DYCD Connect Help Center

If you have questions or concerns, please submit a help request to the DYCD Connect Help Center. You may reach the Help Center direct from the banner at the top of DYCD Connect by clicking on the question mark, as shown below.



Alternatively, you may submit a request through the <u>Help Center</u> on the DYCD Connect homepage.



