

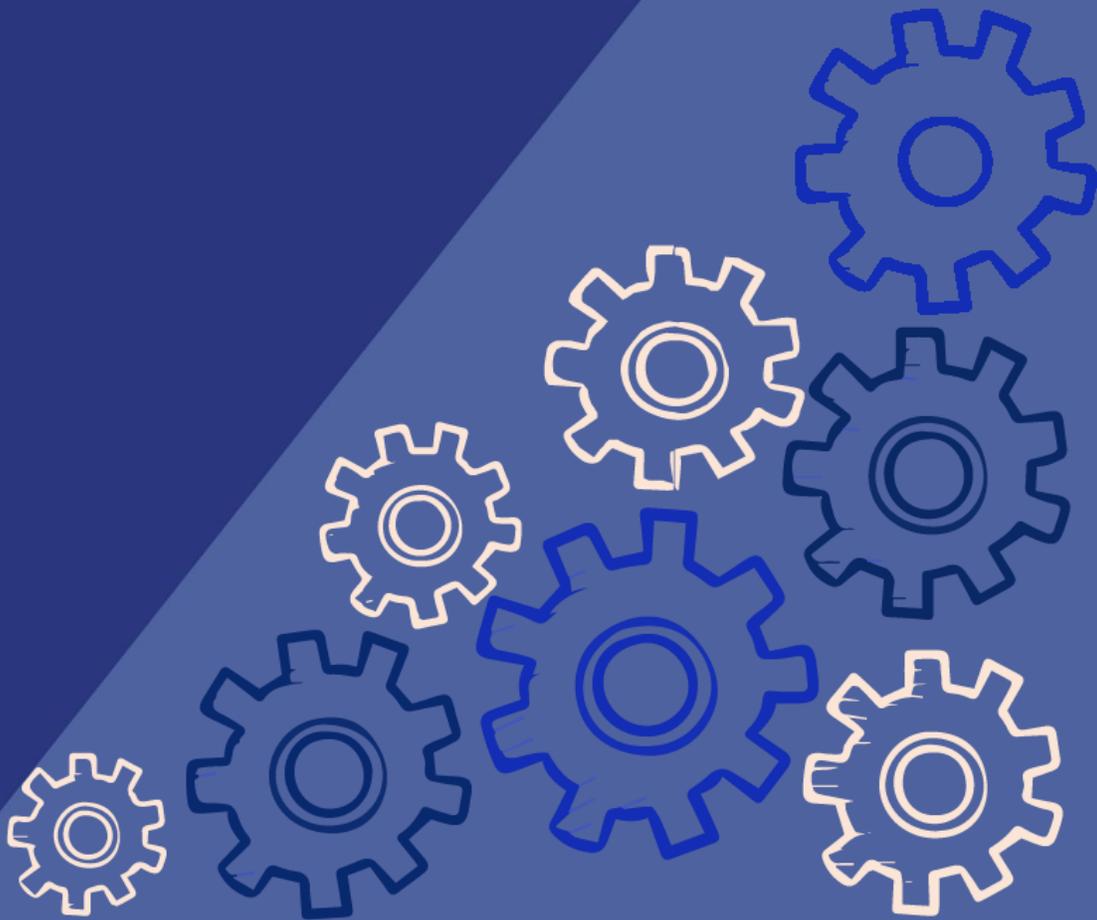


# **DYCD CONNECT**

*PARTICIPANT TRACKING SYSTEM:*

*COMPASS*

*Managing Team Members*

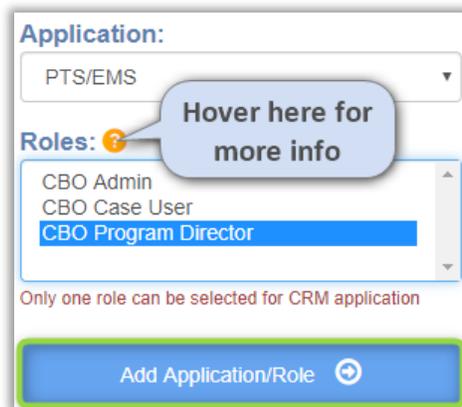


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# Key Terms

**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).



**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.



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

**Click on your Provider Name from a page Header to quickly navigate to the Provider Portal**

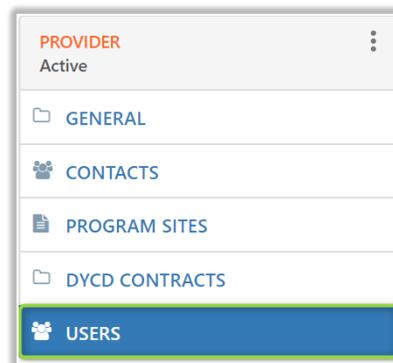
100020-COMPASS Elementary-7/1/2017-8/31/2017

Provider  
Development Center

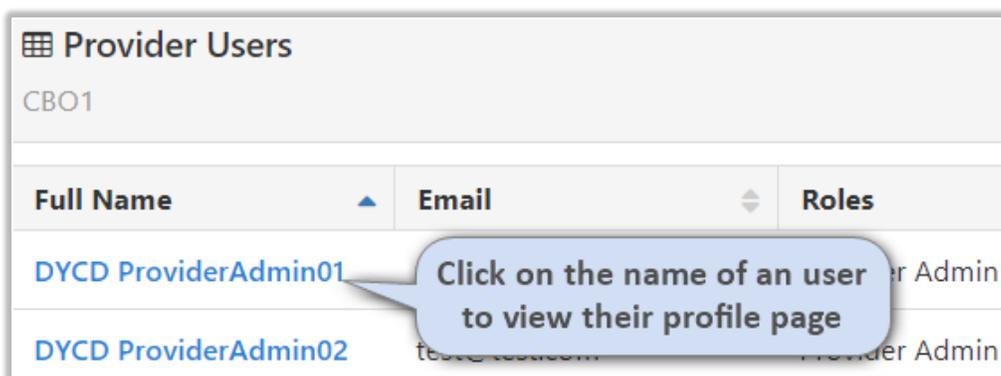
Program Site  
P.S. 9

Program Period  
7/1/2017 - 8/31/2017

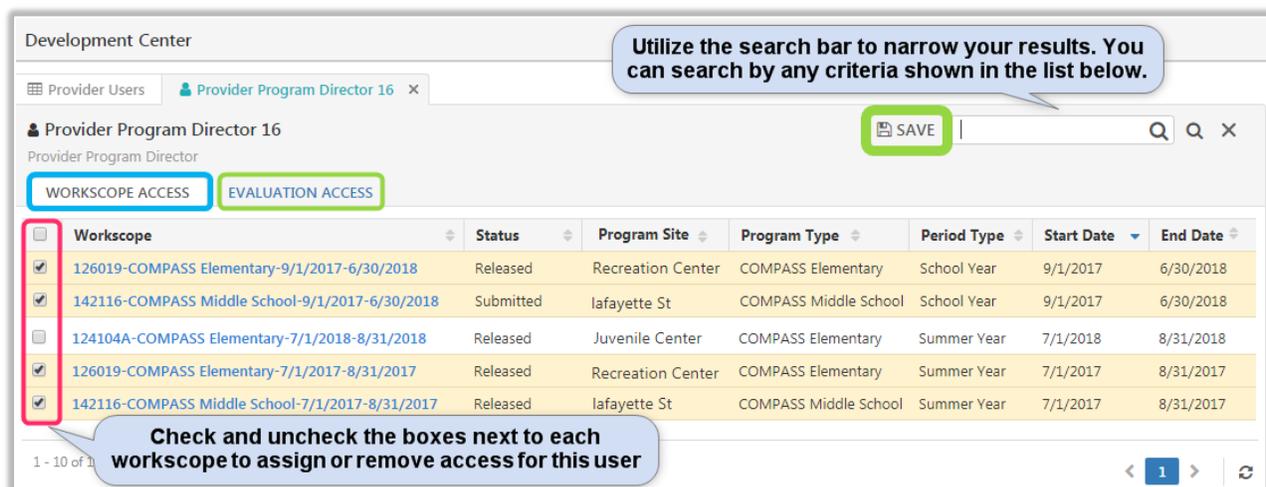
**Step 2:** A new page with information about your CBO and its DYCD contracts will open. Using the left-hand switchboard, click “USERS” to find the ‘Provider Users’ table. This contains the full list of names of all users registered by your CBO.



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



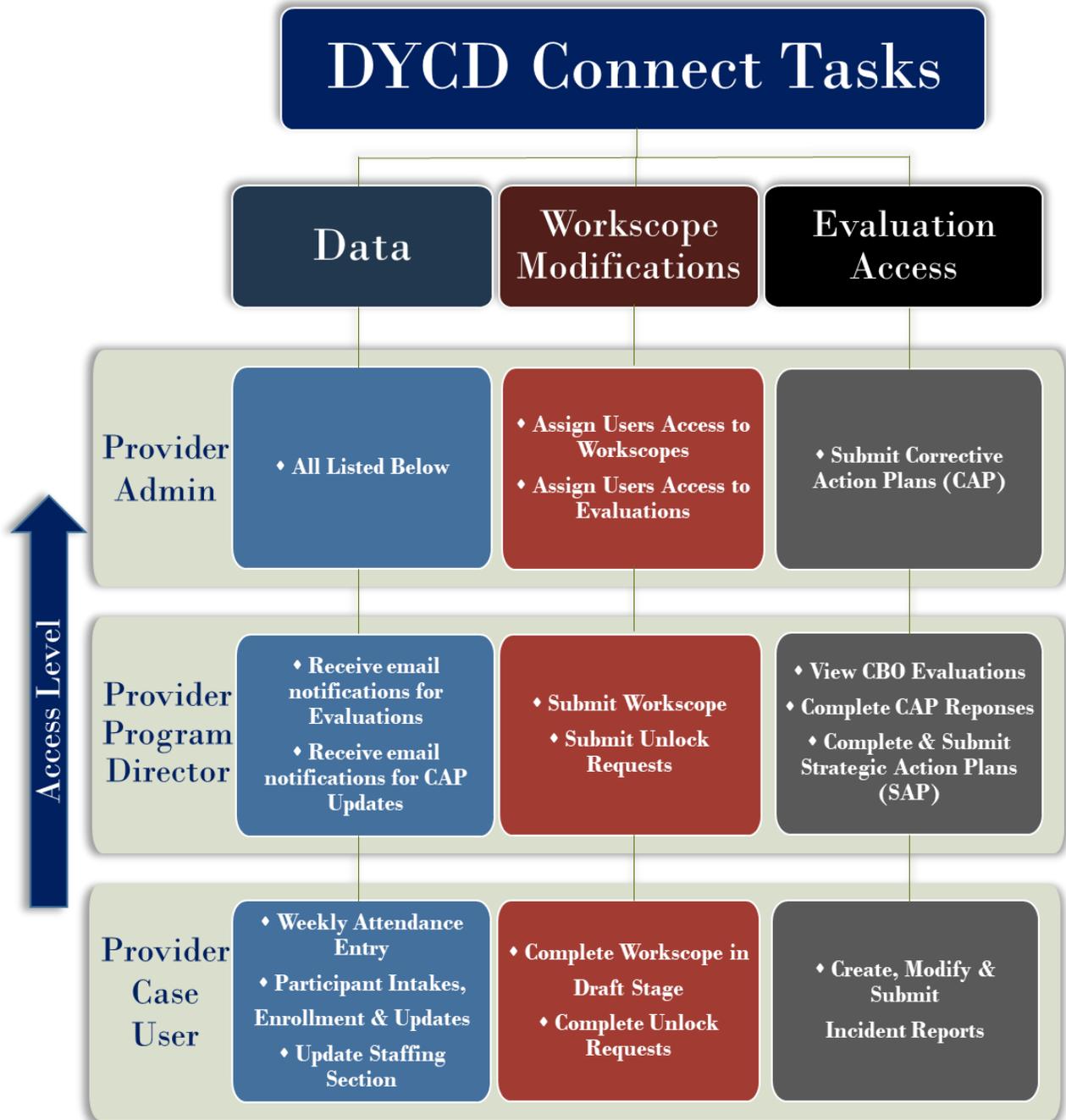
**Step 4:** Click “Save” to complete your changes. If you want to grant or remove access to an evaluation, go to ‘Evaluation Access’ and follow the same steps.



**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 [DYCD Connect Help Center](#).

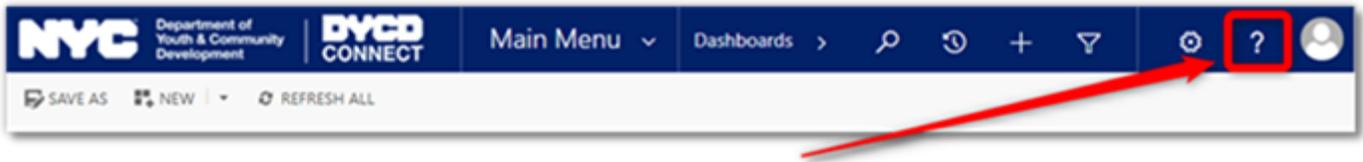
# Breakdown of Team Member Access

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 [Help Center](#) on the DYCD Connect homepage.

