

USER, USER PERMISSIONS AND CCS PERSONNEL

This tip sheet will walk you through how to:

- Create Users
- Assign a Role
- Create CCS Personnel:
→ Management and Control and Operation/Contact Roles
- Remove Users
- Troubleshooting

Summary

Create new user:

1. Click on the settings cog
2. Select users/personnel
3. Click create new contact
4. Enter the user's first and surname and click Continue
5. Enter the user's details
6. Tick Grant System Access
7. Tick Active
8. Enter a unique username
9. Click Save
10. Click Send Password Reset Email

Assign a Role:

1. While in the user record click sites tab
2. Click edit on the Site Name
3. Select the required role/s
4. Click Save

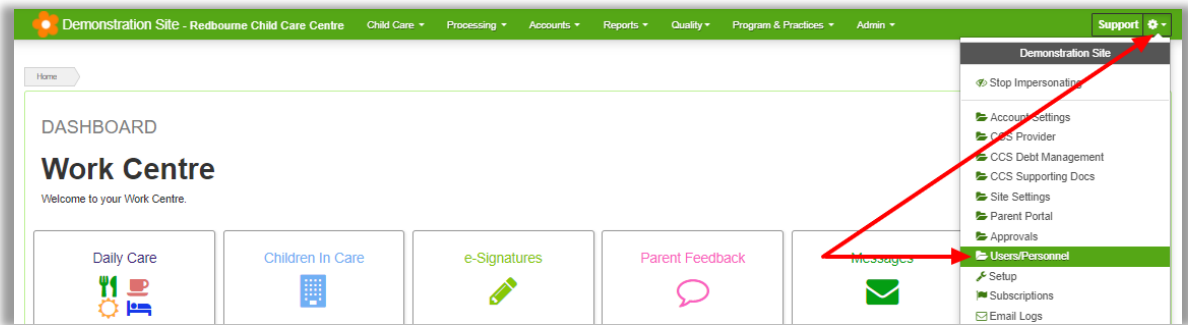
Generate e-Signature PIN for user:

1. Click on the e-Signature tab
2. Tick Enable e-Signature Access
3. Select the user's start date and click Generate
4. Click Save

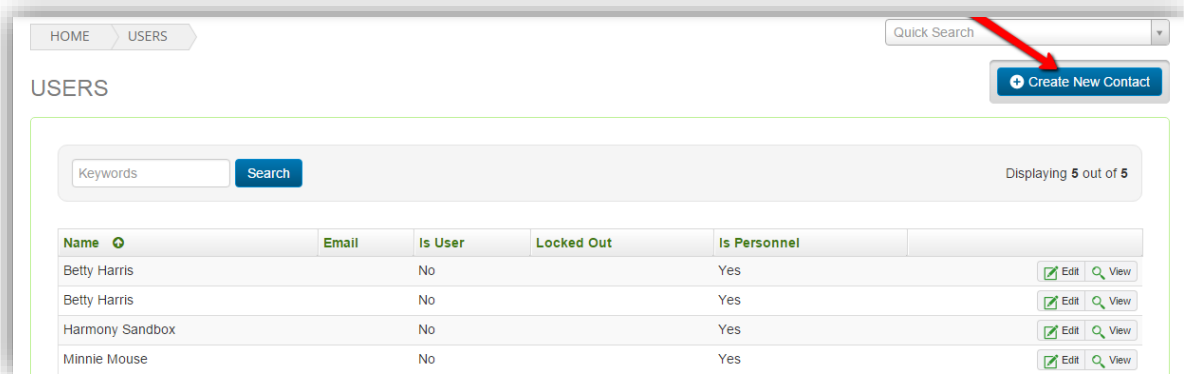
CREATING A USER

Detailed

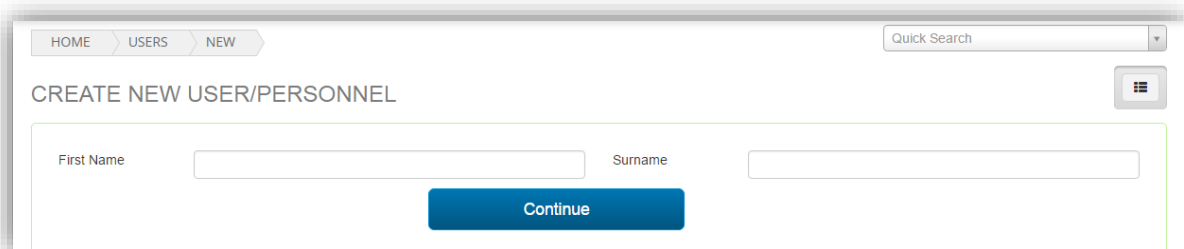
Click on the **settings cog** and click **Users/Personnel**



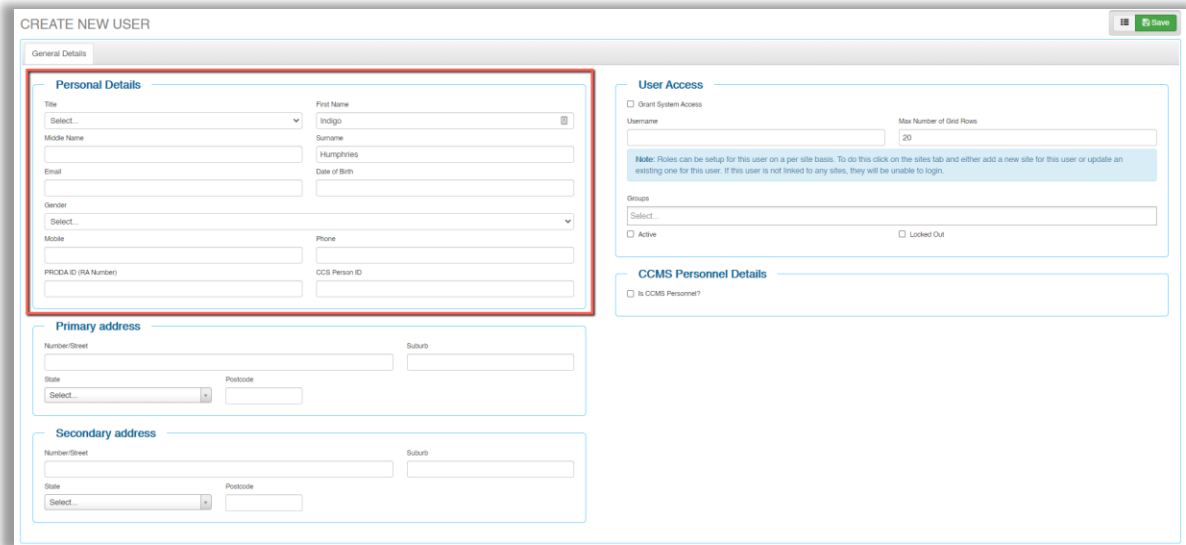
Click **Create New Contact**



Enter the users **first** and **surname** then click **continue**:



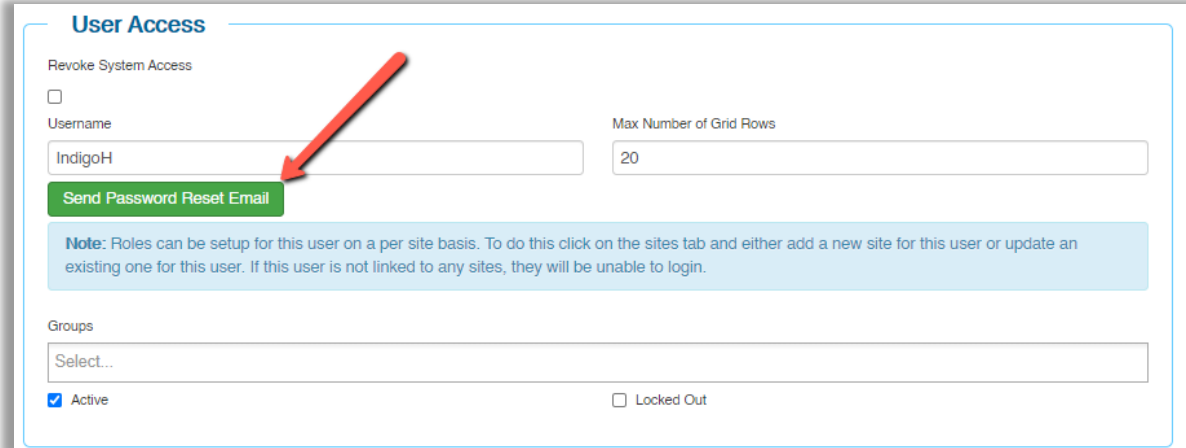
Enter the user's details:



Tick **Grant System Access**.

Tick **Active** and click **Save**.

Click **Generate Password Reset Email**. The user will receive an email from which they may set their own password.



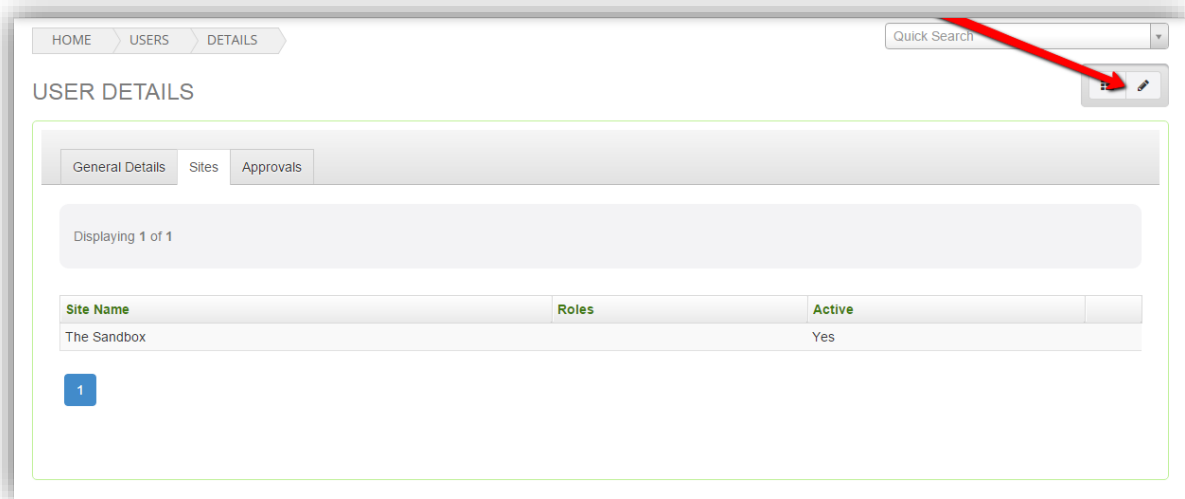
Once you have saved the record, you will have access to additional tabs.

NOTE: Following this first process you have given the user access to log into the system only. In order for them to be able to see data within your system you will need to assign them a role. Please continue through to 'assign a role' on how to do this.

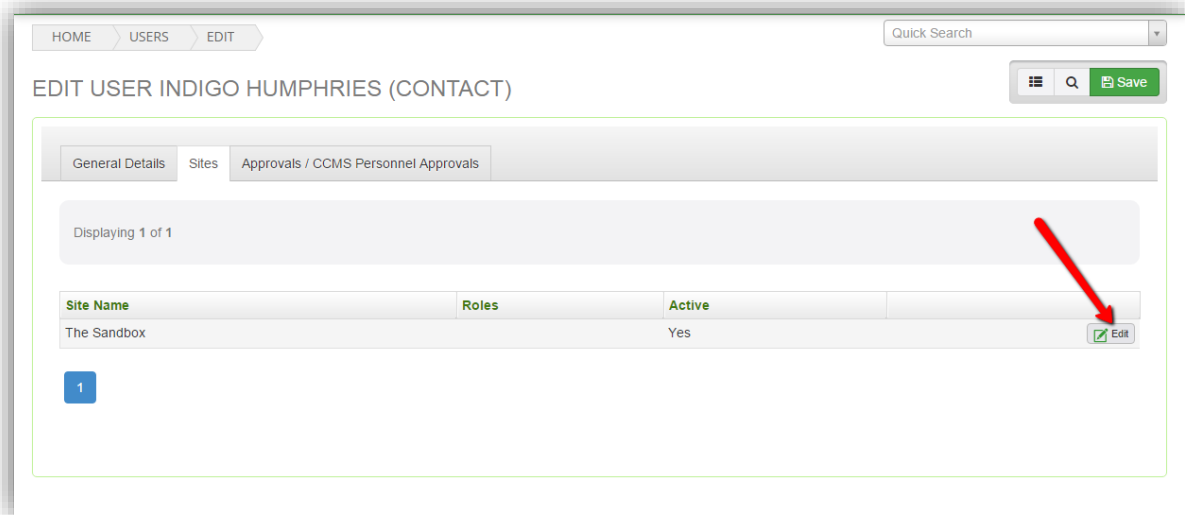
Assign a Role

You will assign a role in the software to let the system know what permissions/data they are able to access. You can create new roles and customise permissions if you are wanting to limit information the user is able to see and do. To do this please see our tip sheet called **Service Set Up** and view the **roles** section.

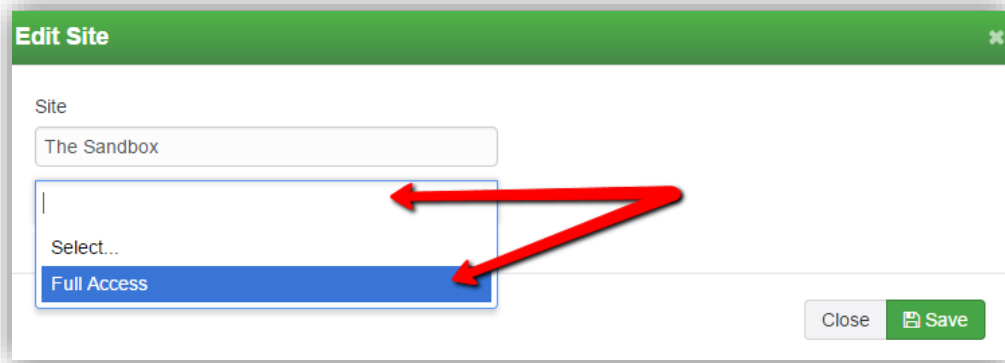
Click the **Sites** tab and click the **Edit** pencil.



Click **Edit**



Click the blank box and select a role from the dropdown menu.



Click **Save**

The role will now display in the table.



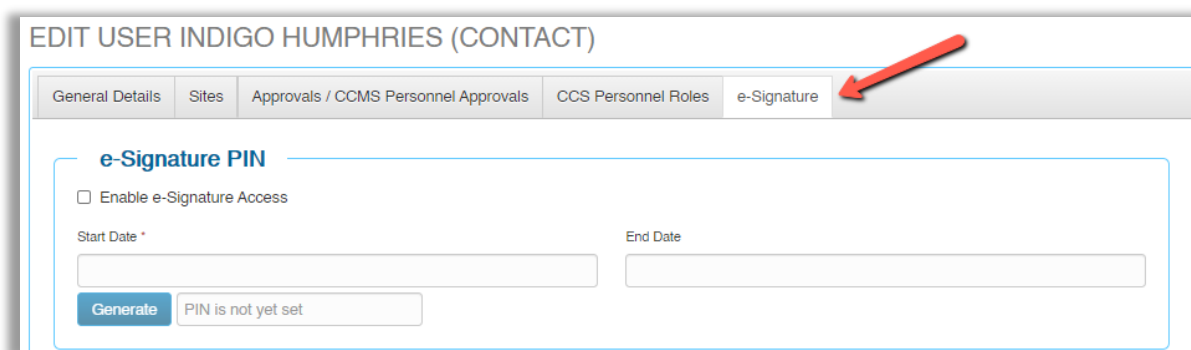
Site Name	Roles	Active	
The Sandbox	Full Access	Yes	

NOTE: You will not be able to assign the "Account Admin Access" role, this can only be assigned by the System Administrator, please make contact with our Support Desk.

Generate a PIN

If your service is utilising our e-Signature module you will also be able to generate a pin for your user in here.

While in the user record click on the e-Signature tab.



Tick **Enable e-Signature Access**

Enter a **Start date** and tick **Generate**. A pin number will now be emailed to the user.

Click **Save**

CREATING A CCS PERSONNEL ROLE

Summary

Management and Control Role:

1. Click on the settings cog
2. Select CCS provider
3. Select Personnel Tab
4. Click the create button and fill in the details required:
 - a. Select Position
 - b. Select start Date
 - c. Select Authorised by
 - d. Answer previous history questions
 - e. Answer Declaration questions and upload all documents.
5. Click Submit

NOTE: You will not be able to submit the role until you have all relevant documents.

Operational / Contact Roles:

1. Click on the settings cog
2. Select user/personnel
3. Select CCS Personnel Roles Tab
4. Click the add role button and fill in the details required:
 - f. Select Role (Operational or Contact)
 - g. Select start Date
 - h. Select Authorised by
 - i. Answer Declaration questions and upload all documents.
5. Click Submit

CREATING A CCS PERSONNEL ROLE

Detailed

There are 3 different CCS roles:

- 1- Management and Control
- 2- Operational
- 3- Service Contact

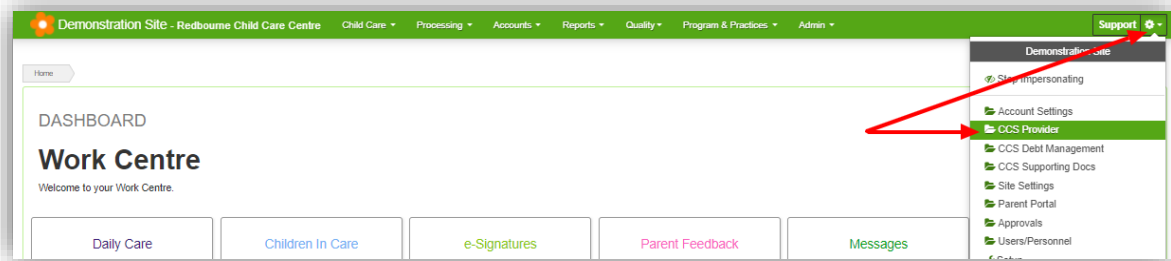
If you are unsure of what CCS Role to assign a user please contact CCS for further information.

Management and Control role


This user can only be created within your CCS provider Profile.

Select  Cog button

Select CCS Provider



Select Personnel tab

Select  Edit button for the required person:



Select Provider Role tab:

CCS PERSONNEL Remove from CCS

Person ID: 0110210023 Name: Edwina Costello End Date:

Provider Role **Service Role** WWCC

Displaying 0 out of 0 + Create

There are no records to display

Select **+Create** button and the following window will open:

Create Provider Personnel

Personnel: Edwina Costello PRODA ID (RA Number): CCS Personnel Id: 0110210023

Provider Role

Role: Management Or Control Position: Select...

Start Date: 30/05/2018 Authorised By: Freddie Wilson

Previous History

In the last five (5) years has the individual: Yes No N/A

- been subject to administration, receivership, liquidation, bankruptcy?
- incurred any debts to the Commonwealth (whether or not the debt has been discharged)

In the past five (5) years has the individual been a Director, shareholder or Trustee of a business entity at the time it was subject to any of the following: Yes No N/A

- administration
- receivership
- liquidation (voluntary or involuntary)
- bankruptcy
- debt recovery proceedings

Declaration

Have you sighted:

Police Check

An Australian National Police Criminal History Check obtained from the relevant state or territory police service or an agency accredited by the Australian Criminal Intelligence Commission, and obtained no more than six months. Yes No N/A

Supporting Document Choose file | No file chosen

Allowed Document Types: "pdf", "png", "tiff", and "jpg".

ASFA

An National Personal Insolvency Index check performed using the Bankruptcy Register Search service provided by the Australian Financial Security Authority (AFSA). Yes No N/A

Bankruptcy search result Choose file | No file chosen

Allowed Document Types: "pdf", "png", "tiff", and "jpg".

ASIC

A Current and Historical personal name extract search of the records of the Australian Securities and Investments Commission (ASIC) Yes No N/A

ASIC search result Choose file | No file chosen

Allowed Document Types: "pdf", "png", "tiff", and "jpg".

Have the above checks revealed any adverse events? Yes No N/A

Close Submit

Select the user's Position, enter their start date and select the person authorising the transaction.

You will next need to answer questions relating to the user's previous history.

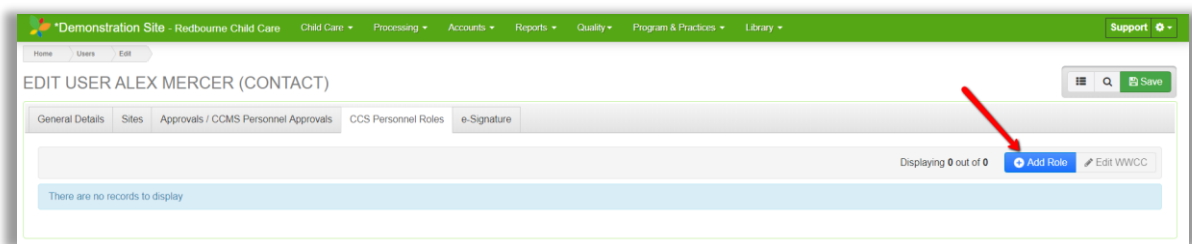
All fields within the **Declaration** are mandatory.

You will need to complete each of these fields, upload supporting documents and click on the **Submit** button.

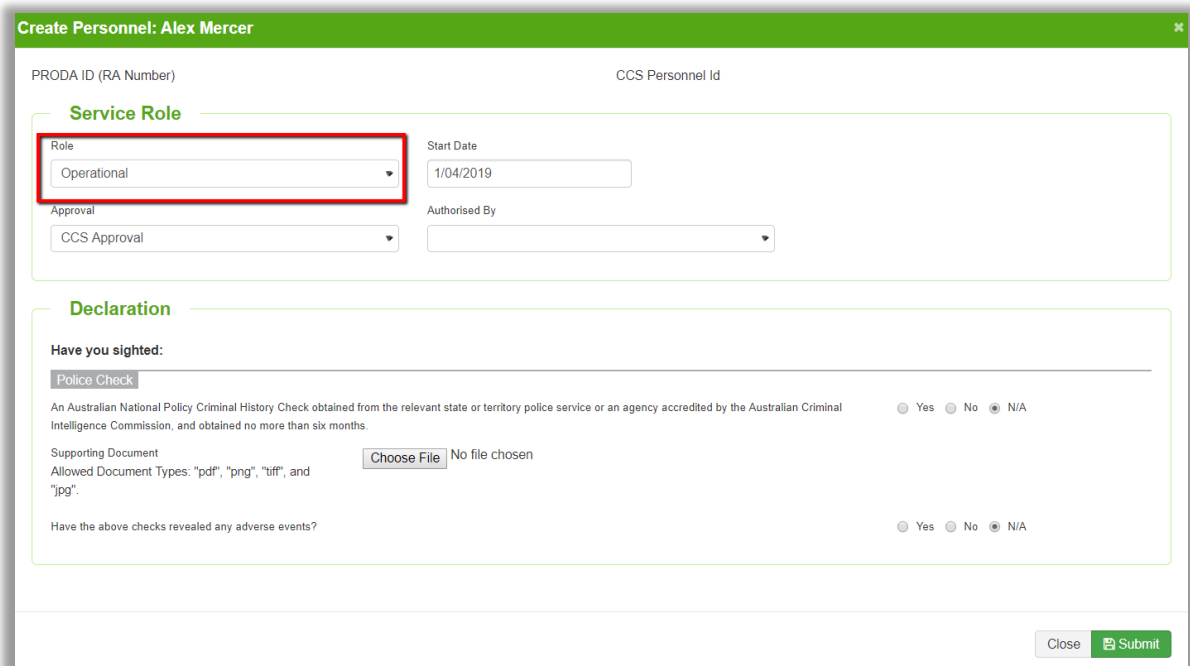
It is important to note that this must be submitted by a user with a 'Management or Control' role.

Operational Role

This role is created through the user record. While in the user record click on the **CCS Personnel Roles** tab and click on **Add Role**



The following window will then appear:



Create Personnel: Alex Mercer

PRODA ID (RA Number) _____ CCS Personnel Id _____

Service Role

Role: **Operational** Start Date: 1/04/2019

Approval: CCS Approval Authorised By: _____

Declaration

Have you sighted:

Police Check

An Australian National Police Criminal History Check obtained from the relevant state or territory police service or an agency accredited by the Australian Criminal Intelligence Commission, and obtained no more than six months. Yes No N/A

Supporting Document No file chosen

Allowed Document Types: ".pdf", ".png", ".tiff", and ".jpg".

Have the above checks revealed any adverse events? Yes No N/A

Make sure the **Operational Role** is selected

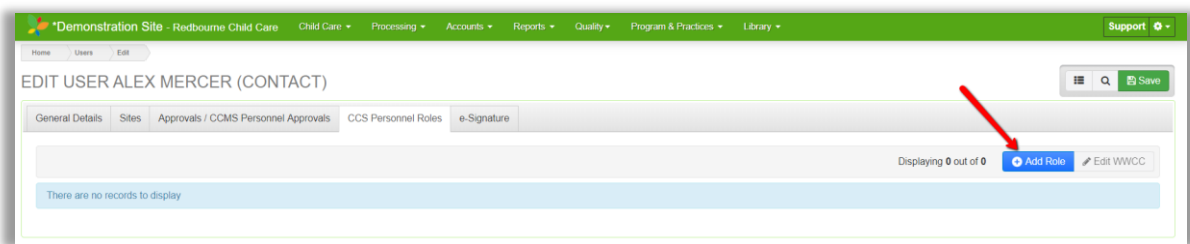
Change **start date** if needed

Select **Authorised Person**

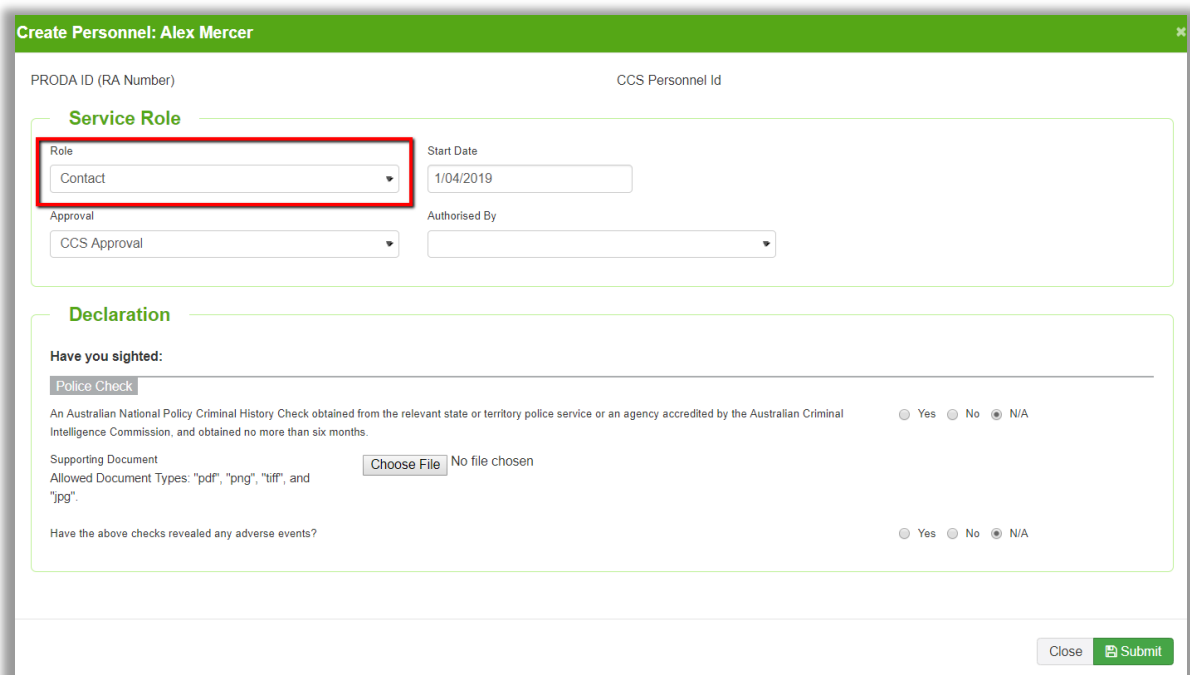
Fill in the **Declaration**, you will need to complete each of these fields, upload supporting documents and click on the **Submit** button.

Service Contact Role

This role is created through the user record. While in the user record click on the **CCS Personnel Roles** tab and click on **Add Role**



The following window will then appear:



Make sure the **Contact Role** is selected

Change **start date** if needed

Select **Authorised Person**

Fill in the **Declaration**, you will need to complete each of these fields, upload supporting documents and click on the 'Submit' button.

REMOVING USERS

Summary

Revoke System Access

1. Click on the settings cog
2. Click Users/Personnel
3. Find the user and click edit
4. Tick Revoke System Access
5. Untick Active
6. Click Save

End CCS Personnel Role – Management and Control

1. Click on the settings cog
2. Select CCS provider
3. Select Personnel Tab
4. Find the User and click edit
 - a. Select an authorised person
 - b. Select end date
5. Click submit

End CCS Personnel Role – Operational/Contact

1. Click on the settings cog
2. Select user/personnel
3. Find the User and click edit
4. Click on the CCS personnel roles tab
5. Click edit on the role
 - c. Select an authorised person
 - d. Select end date
6. Click submit

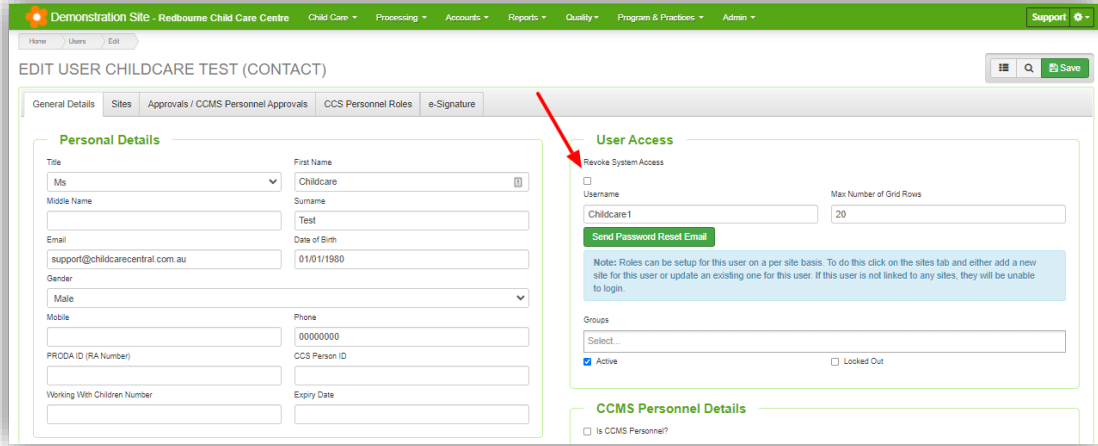
REMOVING USERS

Detailed

There are 2 processes to follow when a user is no longer with your service.

1 - Revoke system access

While in the user record Click **Revoke System Access**

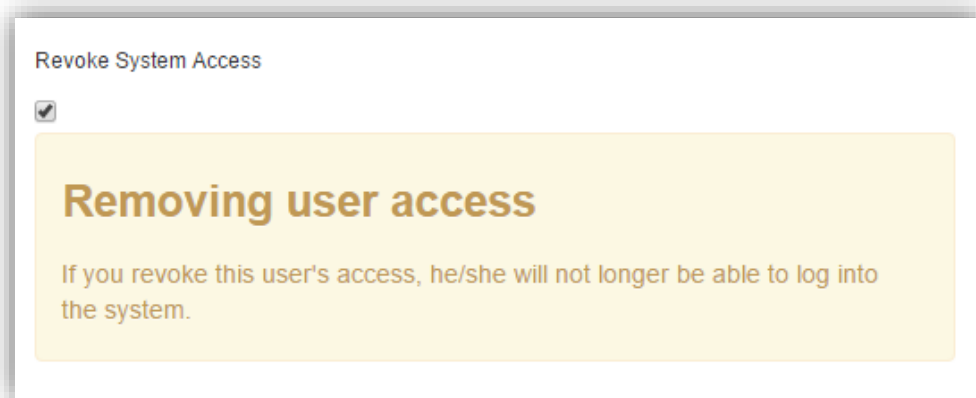


The screenshot shows the 'EDIT USER CHILDCARE TEST (CONTACT)' form. The 'User Access' section is highlighted with a red arrow. It contains the following fields and options:

- Revoke System Access
- Username: Childcare1
- Max Number of Grid Rows: 20
-
- Note: Roles can be setup for this user on a per site basis. To do this click on the sites tab and either add a new site for this user or update an existing one for this user. If this user is not linked to any sites, they will be unable to login.
- Groups: Select...
- Active Locked Out

Below the 'User Access' section is the 'CCMS Personnel Details' section with the option Is CCMS Personnel?

The following message will appear:



Click **Save**

The user will no longer have access to the software.

2 – End dating the CCS Role

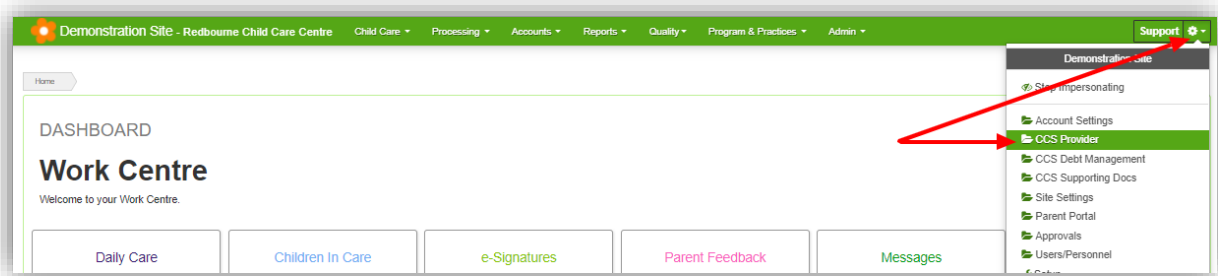
Management or Control Role

NOTE: If you want to remove a management and control DO NOT do this until a new management and control person has been created and queried successfully in your software. If you are unsure of the process, please contact the Support Desk.

This role can only be ended within your CCS provider Profile.

Click on the **Settings Cog** button

Select **CCS Provider**

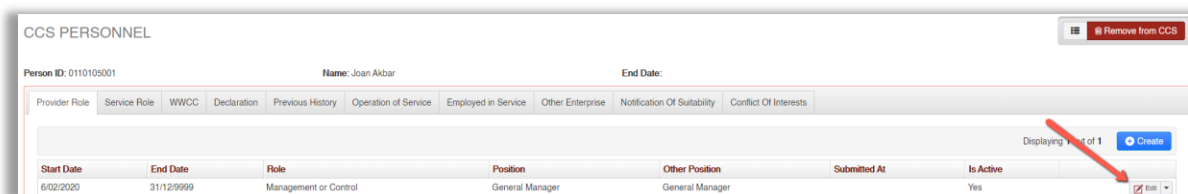


Select **Personnel** tab

Find the user/role and select **Edit** button for the required person:



Again, the role will display so click **edit** again:



Now, enter the end date:

Edit Provider Personnel

Personnel: Joan Akbar

PRODA ID (RA Number): CCS Personnel Id: Phone: Email:

Provider Role

Role: Management Or Control Position: General Manager

Start Date: 6/02/2020 End Date: 31/12/9999 Authorised By:

Click on **Submit**.

Operational and Service Contact Roles

The role for a operational and service contact user is ended via their user record.

Click the **settings cog** and select **Users/Personnel**:

Demonstration Site - Redbourne Child Care Centre

Home

DASHBOARD

Work Centre

Welcome to your Work Centre.

Daily Care Children In Care e-Signatures Parent Feedback Messages

Support

- Stop Impersonation
- Account Settings
- CCS Provider
- CCS Debt Management
- CCS Supporting Docs
- Site Settings
- Parent Portal
- Approvals
- Users/Personnel**
- Setup
- Subscriptions
- Email Logs

Find the user and click **Edit**:

USERS

Keywords: Search Displaying 17 out of 17

Name	Email	Is User	Locked Out	Is Personnel	
Ablett Blundie	emilyf@redbourne.com.au	Yes		No	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> View
Andrew Simons	talaw@redbourne.com.au	Yes		No	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> View
Childcare Test	support@childcarecentral.com.au	Yes		No	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> View
David Pierson	davidp@redbourne.com.au	Yes		No	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> View
Demo Personnel	support@childcarecentral.com.au	No		No	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> View
Elise Hopkin	support@childcarecentral.com.au	Yes		Yes	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> View

Click on the **CCS Personnel Roles** tab then click **Edit** on the role displaying.

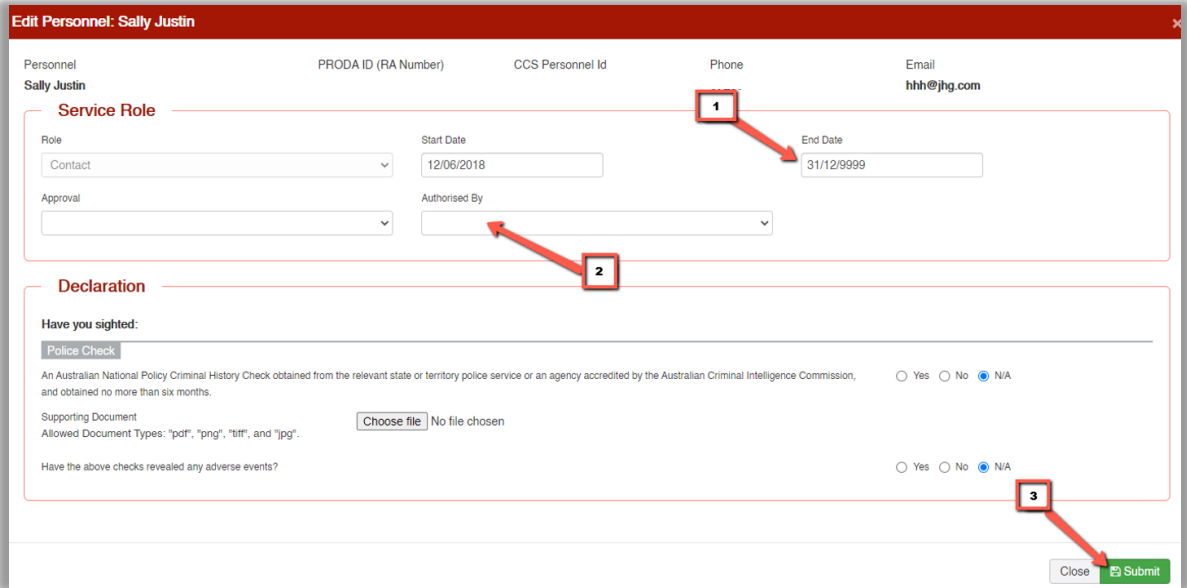
EDIT USER SALLY JUSTIN (CONTACT)

General Details Sites Approvals / CCMS Personnel Approvals **CCS Personnel Roles** e-Signature

Displaying 1 out of 1 Add Role Edit WWCC Query CCS

PRODA ID (RA Number)	Person Id	Approval	Start Date	End Date	Role	Submitted At	
			12/06/2018	31/12/9999	Contact	12/06/2018 05:34 PM	<input checked="" type="checkbox"/> Edit

Select an end date, authorised person and click on submit.



Edit Personnel: Sally Justin

Personnel	PRODA ID (RA Number)	CCS Personnel Id	Phone	Email
Sally Justin				hhh@jhg.com

Service Role

Role: Start Date: End Date:

Approval: Authorised By:

Declaration

Have you sighted:

Police Check

An Australian National Policy Criminal History Check obtained from the relevant state or territory police service or an agency accredited by the Australian Criminal Intelligence Commission, and obtained no more than six months. Yes No N/A

Supporting Document

Allowed Document Types: "pdf", "png", "tiff", and "jpg". No file chosen

Have the above checks revealed any adverse events? Yes No N/A

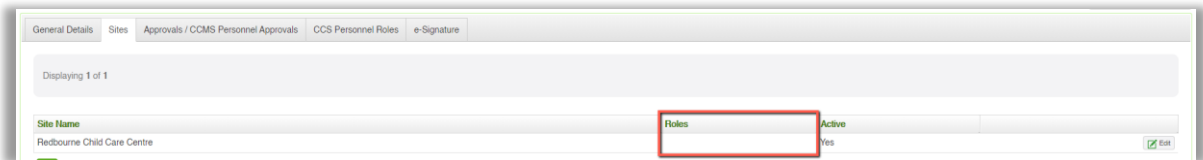
When the system queries overnight the role will be removed from the CCS Personnel Tab.

USER, USER PERMISSIONS AND CCS PERSONNEL

Troubleshooting

Issue: The user can log in but they cannot see anything.

Why? This is due to the user not being assigned to a Role. The role contains permissions on what the user can see and do within the system.



Resolution: While in the user record click sites tab, click edit on the site name, select the required role/s, click save.

Now advise the user to log out and log back in.

Issue: I don't want the user to have full access.

Resolution: You can create new roles and therefore change the permissions. To do this process we would recommend viewing the tip sheet called **Service Set Up** under the section called **Roles**.

Issue: If you get an error saying 'Last Name does not match PRODA'

Resolution: There are four reasons for when we get the Last Name Does Not Match are the following:

- Last Name Does Not Match PRODA's records
- Documents have not been all verified
- Account has become inactive
- When entering the PRODA Id in the user record, you have entered incorrect details or entered the RA in front of the number.

If you have checked all this, we suggest contacting PRODA for further assistance.

Issue: I am ending a CCS role and I'm getting an error saying the role doesn't exist.

Resolution: This means that the role has already been ended elsewhere.

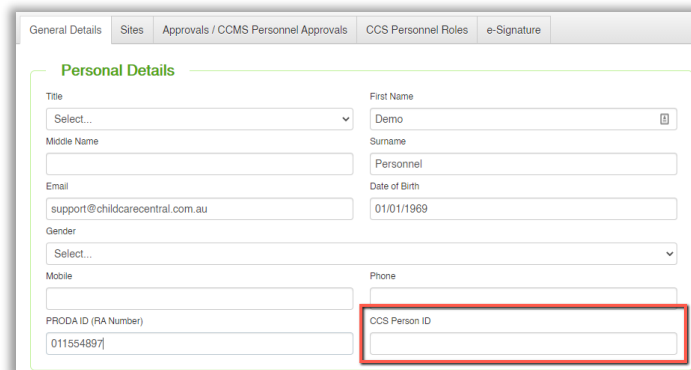
Click on the Query CCS button and the role will be removed.

Issue: I have already created the personnel role in PEP, do I need to create it again?

Resolution: No if you try and create it again you will get an error. In this case, we can just pull through the role.

Management or Control Role

1. Navigate to the General Details tab and enter their CCS personal I.D in the space provided then Save.

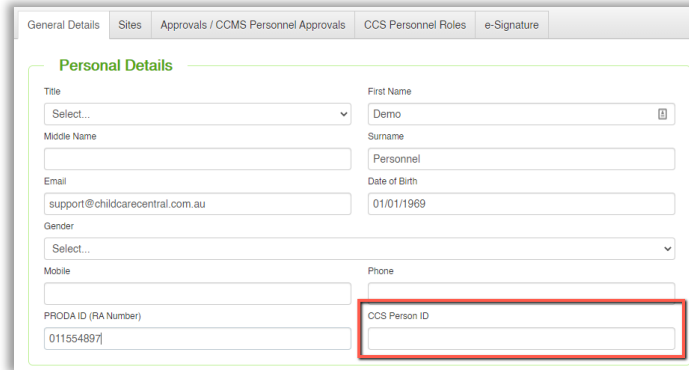


The screenshot shows a web application interface with a tabbed menu at the top. The tabs are: 'General Details', 'Sites', 'Approvals / CCMS Personnel Approvals', 'CCS Personnel Roles', and 'e-Signature'. The 'General Details' tab is selected. Below the tabs is a form titled 'Personal Details'. The form has several input fields: 'Title' (a dropdown menu), 'First Name' (text input), 'Middle Name' (text input), 'Surname' (text input), 'Email' (text input with 'support@childcarecentral.com.au'), 'Date of Birth' (text input with '01/01/1969'), 'Gender' (a dropdown menu), 'Mobile' (text input), and 'Phone' (text input). At the bottom of the form, there are two fields: 'PRODA ID (RA Number)' with the value '011554897' and 'CCS Person ID' (which is highlighted with a red rectangular border).

2. Click on the settings cog and select CCS Provider
3. Click on Query Provider Profile
4. Select Authorised person and click query.
5. The role will then display within the Personnel tab.

Operational/Contact Role

1. Navigate to the General Details tab and enter their CCS personal I.D in the space provided then Save.

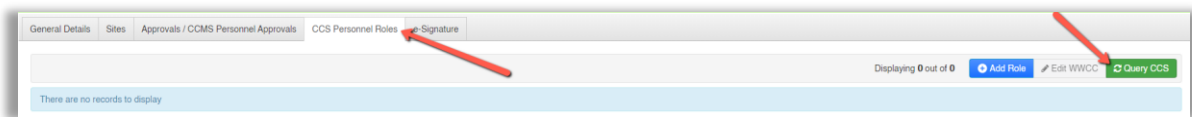


General Details Sites Approvals / CCMS Personnel Approvals CCS Personnel Roles e-Signature

Personal Details

Title: Select... First Name: Demo
Middle Name: Surname: Personnel
Email: support@childcarecentral.com.au Date of Birth: 01/01/1969
Gender: Select...
Mobile: Phone:
PRODA ID (RA Number): 011554897 CCS Person ID: [Red Box]

2. Once Saved, click on the CCS Personnel Roles tab
3. Click on Query CCS



General Details Sites Approvals / CCMS Personnel Approvals CCS Personnel Roles e-Signature

Displaying 0 out of 0 Add Role Edit WWOCC Query CCS

There are no records to display

4. Select Authorised person and click query.
5. The role will then display accordingly.

Issue: I cannot see the CCS Provider option within the cog settings.

Why? Only users with Management or Control roles with CCS will be able to access this option within the cog settings. If you have a Management or Control role and do not have access to this area, please contact the support team and we will be able to assign the correct Role to your user account.