CWIS County Children and Youth Services Agency Delegated Administrator User Guide

Revised January 12, 2015
Background

The instructions in this document provide guidance to county delegated administrators (DAs) on how to do the following:

- **Approve County b-dash User CWIS Access Request** (for both new b-dash users and existing county b-dash users needing CWIS access)
- **Reset (Unlock) County b-dash User Password** (for a county b-dash user who has locked their password or forgotten it)
- **Revoke County b-dash User Access** (for a county b-dash user who has left the organization or no longer needs access to CWIS)

- Delegated administrators CANNOT create a b-dash account for users in their county -- ONLY the individual user can request a new account (instructions provided in a separate document)
Approve County b-dash User CWIS Access Request

**Scenario:**
A county user has just registered for a CWIS b-dash account via the CWIS worker portal; or an existing county b-dash user (without CWIS access) requests access from the CWIS worker portal. The DA will receive an email notification of the request. The DA then logs in to approve the request.
Approve County b-dash User CWIS Access Request: Step 1

Once the user requests CWIS access, you (the delegated administrator) will receive an email notification.

- Open the email. You will see the user who requested CWIS access.
- Click the **link** in the email
- **OR**
- Navigate to the following web address:
  https://www.hhsapps.state.pa.us/iam/im/businesspartners/ca12/index.jsp
Approve County b-dash User CWIS Access Request: Step 2

- On the **Keystone Key** screen, login to the security application with your b-dash userID and password.
Approve County b-dash User CWIS Access Request: Step 3

- If there are any open requests for you to process, the **Work List** screen on the **Business Partner Management** tab will display with the request(s). *(Note: in the example here, a user has submitted a CWIS access request)*
- Click the request hyperlink (circled below) to open it.
Approve County b-dash User CWIS Access Request: Step 4

- On the **Enterprise BP Admin and User Approval** screen, scroll down to the bottom of the screen and click the **APPROVE** button.
Approve County b-dash User CWIS Access Request: Step 5

- On the **Enterprise BP Admin and User Approval** screen, a task pending alert displays.
- Click **OK** to continue.
Approve County b-dash User CWIS Access Request: Next Steps

- New b-dash users will receive an email with their new b-dash user ID.
- Existing b-dash users will receive an email notifying them of their new access.
Reset (Unlock) County b-dash User Password

**Scenario:**
The county delegated administrator receives a contact from a county b-dash user stating that they need a password reset for several reasons (e.g., the user has forgotten their password, or they have attempted to login too many times and locked their account, etc.). Note: the b-dash user has the ability to reset/(unlock) their password, too. So, the delegated administrator should first ask the user if they have attempted to unlock their account.
Reset (Unlock) County b-dash User Password: Step 1

• Navigate to the Keystone Key web page by entering this URL in your web browser:
  https://www.hhsapps.state.pa.us/iam/im/businesspartners/ca12/index.jsp
Reset (Unlock) County b-dash User Password: Step 2

- On the **Business Partner Management** screen, click the "Reset User Password" link.
On the **Reset User Password** screen, enter search information (User ID, last name, etc.) and click **SEARCH**.

Select the **radio button(s)** next to the user(s) whose password(s) you want to reset.

Click **SELECT**.
Reset (Unlock) County b-dash User Password: Step 4

- On the next **Reset User Password** screen, click **SUBMIT** to complete the process.
Reset (Unlock) County b-dash User Password: Step 5

- Click the OK button to complete the process.
Reset (Unlock) County b-dash User Password: Next Steps

• The user(s) will receive an email with the subject line “Password Reset” and a temporary password.
• At the next login, they will need to use this password; and then they will be prompted to create a new permanent password in addition to set up new security questions again.

SCENARIO COMPLETE
Revoke County b-dash User Access

**Scenario:**
The county delegated administrator needs to remove CWIS access for a user who no longer works at the county, or does not need CWIS access, or any similar reason.
Revoke County b-dash User Access: Step 1

- Navigate to the **Keystone Key** web page by entering this URL in your web browser:
  https://www.hhsapps.state.pa.us/iam/im/businesspartners/ca12/index.jsp
Revoke County b-dash User Access: Step 2

- On the Business Partner Management screen, click the “Revoke CWIS Application Access” link.
Revoke County b-dash User Access: Step 3

- On the **Revoke CWIS Application Access** screen, enter search information (User ID, last name, etc.) and click **SEARCH**.
- Select the **radio button(s)** next to the user(s) whose CWIS application access you want to revoke.
- Click **SELECT**.

![Revoke CWIS Application Access: Select User](image-url)
Revoke County b-dash User Access: Step 4

- On the next **Revoke CWIS Application Access** screen, enter comments into the **Comments** field (if needed).
- Click **SUBMIT**. *(Note: once you remove a user’s CWIS access, they will no longer display in any search results. Only users from your organization with CWIS access will display in the search results).*
Revoke County b-dash User Access: Step 5

- Click the OK button to complete the process.
- The user will NOT receive notification that their CWIS access has been revoked.

SCENARIO COMPLETE