



Agency Admin User Management

Trust Central is a system and, as with all systems, everyone who uses the system is referred to as a “user.” A user with control of what kinds of access other users have is referred to as an “admin” or “administrator.” This resource will provide guidance on how to set up your Agency Admin account and how that Agency Admin account in turn sets up and manages all other user accounts for your agency.

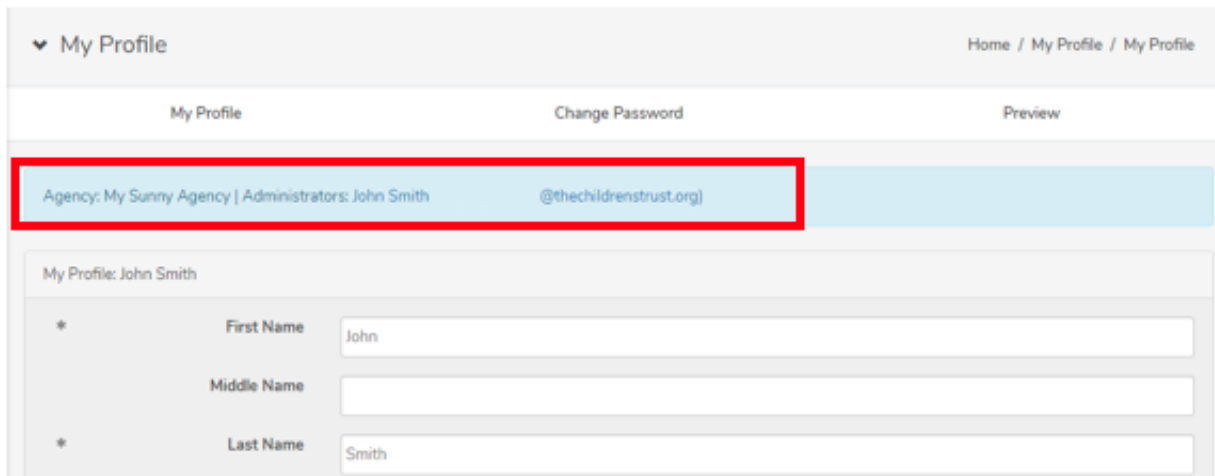
Identifying Who Your Agency Admin Is

If you need to change the level of access you have in Trust Central, you will need to reach out to your Agency Admin so that they can make that change for you. If you are not sure who your Agency Admin, you can identify that person by following these steps:

1. Clicking on your name in the upper-right corner of Trust Central, then clicking on your name again in the pop-out that appears



2. The name and email address of your Agency Admin will then appear in a blue bar above your profile info



Modifying Your Agency Admin

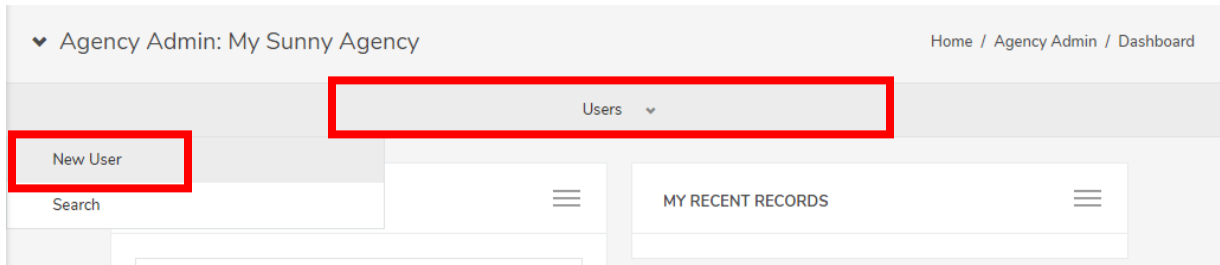
If for some reason you need to change who the Agency Admin is for your organization, then the following steps will walk you through that process:

1. Decide internally who should be your Agency Admin based on the following considerations. This user will:
 - a. Have access to view and edit all the agency's information across all programs
 - b. Will set up all additional user accounts for the agency
 - c. Will manage the level of access each user has within Trust Central
2. Submit your designated Agency Admin's information to your Contract Manager. The required information is: Full Name, Email, Phone Number.
3. Once the request has been processed, your Agency Admin will receive an email with their username and password and can then access Trust Central
 - a. They will be asked to reset their password upon their initial login

Adding a New User

These instructions are for Agency Admins only as they are the ones that have the access necessary to complete this process.

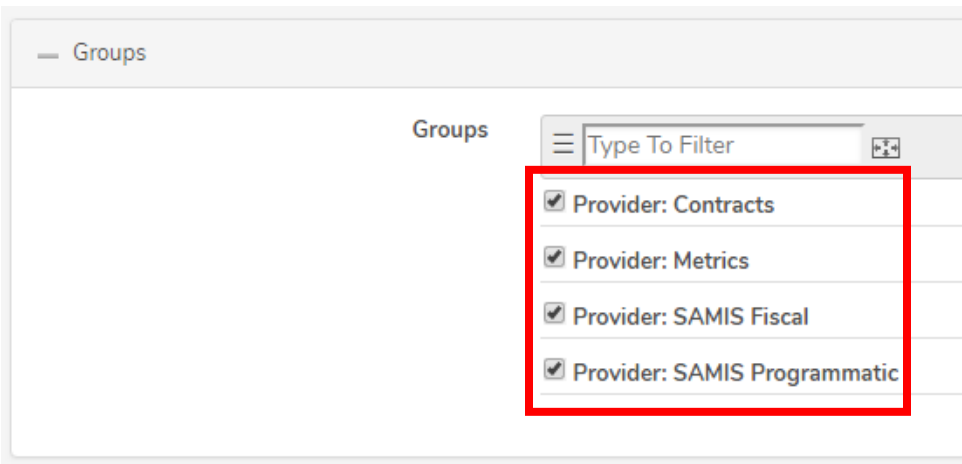
1. Access the **Agency Admin** module either from the home page or the navigation menu
2. Hover over the **Users** tab and click on the **New User** sub-menu option



3. Enter the user's email address and click **Continue**

A screenshot of the 'Add New User' form. The 'Email Address' field contains 'bob@mysunny.org' and is highlighted with a red box. Below the field is a blue 'Continue' button, also highlighted with a red box. The form title is 'Add New User' and there is a 'USERS' dropdown menu at the top right.

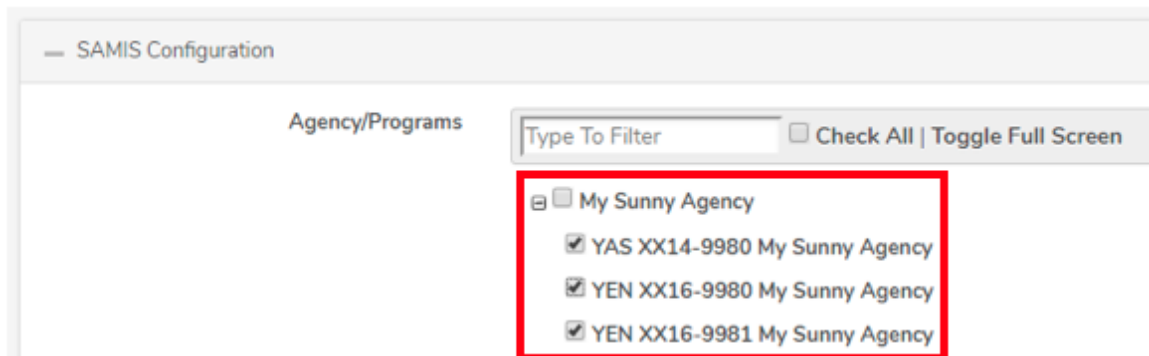
4. In the **Personal** section (the first section), complete the required **First Name** and **Last Name** fields and feel free to complete additional fields, even though it is not required
5. Scroll down the **Groups** section and add a checkbox next to each of the modules for which you want the new user to have access to. [To only add a User for Role/Position purposes, a Group access designation is not required.](#)



Below is a recap of the user will have access to within each section:

- a. **Provider: Contracts** – access to view contracts and amendments as well as optional access to create, review and submit them as designated in the Workflow Setup

- b. **Provider: Metrics** – access to view reports on the program’s performance as well as access to view and edit growth plans
 - c. **Provider: Fiscal** - access to view fiscal documents and reports as well as optional access to create, review and submit fiscal documents as designated in the Workflow Setup
 - d. **Provider: Participants** - access to view and enter programmatic data, including participant demographics, attendance and performance outcomes
6. Scroll down the **Agency/Programs** section and add a checkbox next to each of the programs that user should have access to.

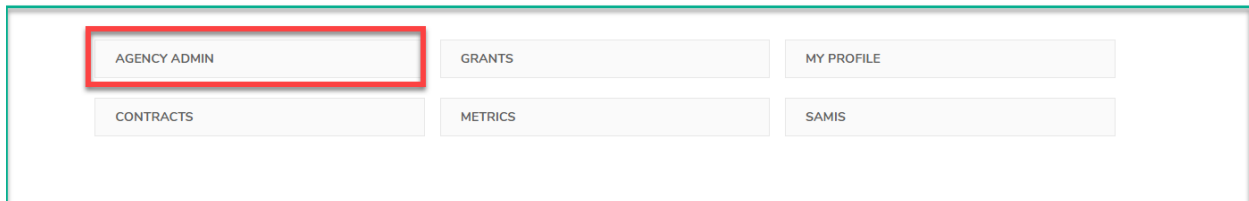


7. Scroll down and click **Save**
8. If you are going to **Add Another** user, you can select that option from the dropdown before clicking **Save**

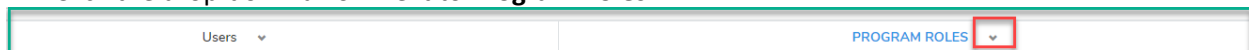
Adding an Agency Role (Position) to Users

These instructions are for Agency Admins only as they are the ones that have the access necessary to complete this process. Ensure that you gather the needed information prior to beginning. Each user must have a role created individually. Please follow the steps under Adding a New User to a new user to Trust Central before you can add an agency role (position) to users.

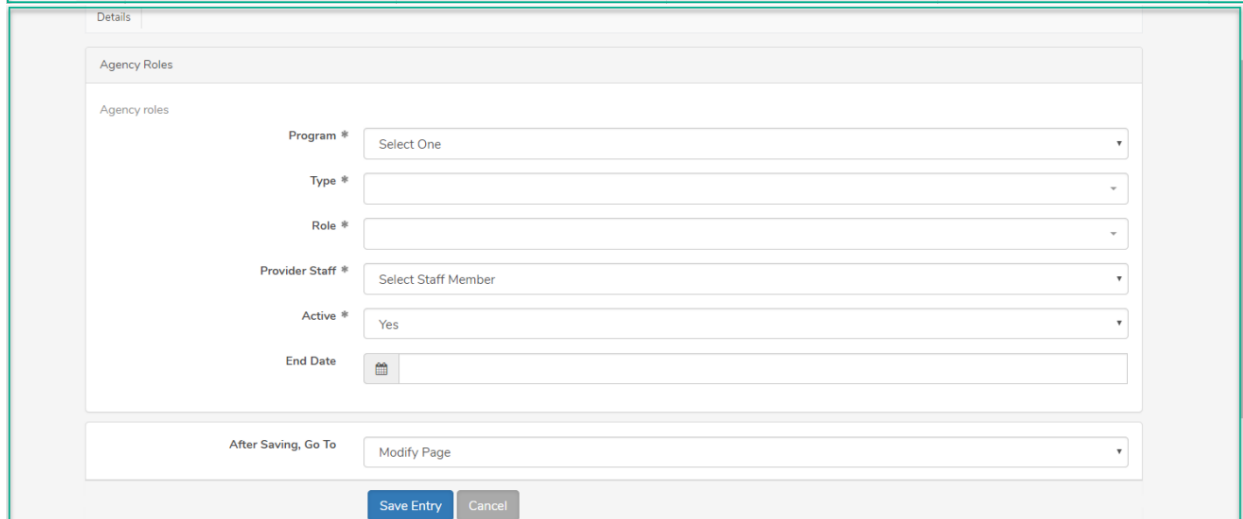
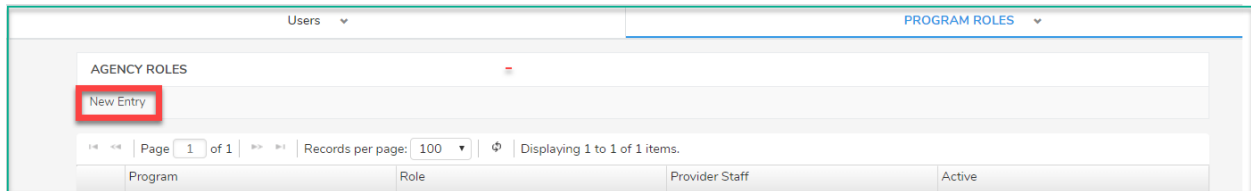
1. Access the **Agency Admin** module either from the home page or the navigation menu



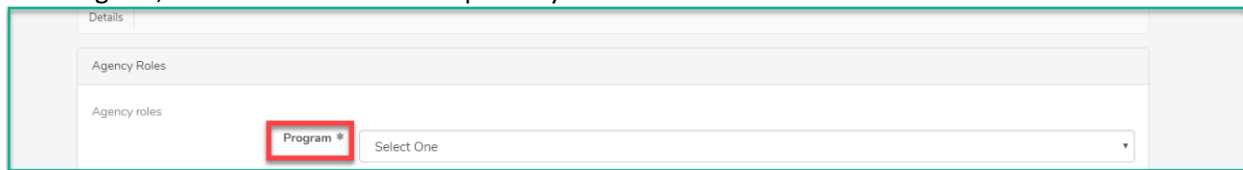
2. Click the drop-down arrow next to **Program Roles**



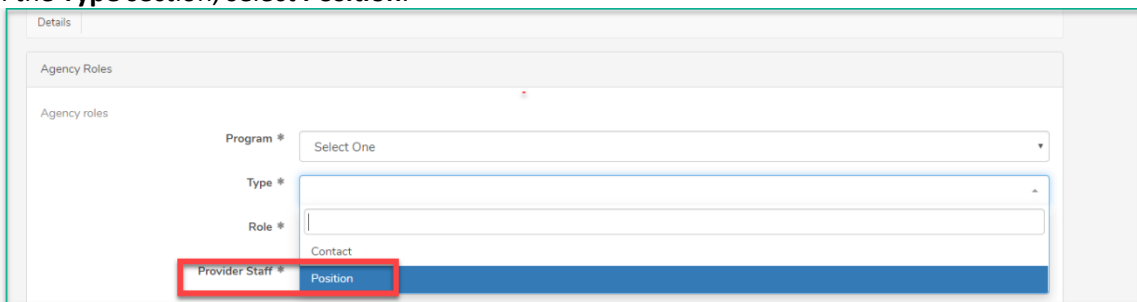
3. Click **New Entry** under Agency Roles



4. Select the **Program** the User is allocated to. If the User is allocated to more than one Position or Program, each must be entered separately.



5. In the **Type** section, select **Position**.



6. Click the drop-down arrow, the available Position types or **Roles** will display. Select the role that best matches that User/Staff Member.

The screenshot shows the 'Agency Roles' form with the following fields:

- Program *: Select One
- Type *: Position
- Role *: (highlighted with a red box)
- Provider Staff *: (highlighted with a red box)
- Active *: (highlighted with a red box)
- End Date: (calendar icon)

 A dropdown menu is open for the 'Role *' field, listing the following options:

- Program Director (highlighted in blue)
- Certified Literacy Teacher/Literacy Instructor
- Direct Service Staff 6-12
- Direct Service Staff K-5
- Administration
- Administrative Support
- Care Coordinator
- Natural Helper
- Counselor

7. Select the Staff Member's name from the drop-down list. If the Staff Member does not appear, then follow the steps above for **Adding a New User** prior to adding the agency role.

The screenshot shows the 'Agency Roles' form with the following fields:

- Program *: Select One
- Type *: (dropdown menu)
- Role *: (dropdown menu)
- Provider Staff *: Select Staff Member (highlighted with a red box)

8. **Yes**, is shown in the **Active** field. Only change to No if the Staff Member should not have access to any system (Trust Central and LMS) or is not currently working.

The screenshot shows the 'Agency Roles' form with the following fields:

- Active *: Yes (highlighted with a red box)
- End Date: (calendar icon)

9. Scroll down and click **Save Entry**.

The screenshot shows the bottom of the form with two buttons:

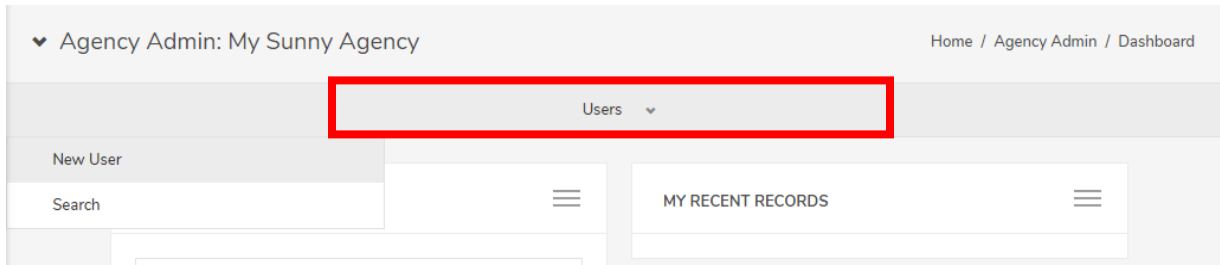
- Save Entry (highlighted with a red box)
- Cancel

[If the Staff Member is allocated to more than one role or more than one position, start again on **Adding an Agency Role (Position) to Users** step 2 to add each role.]

Edit Existing User, Including Password Reset

These instructions are for Agency Admins only as they are the ones that have the access necessary to complete this process. Note that users may also reset their own passwords by clicking **Forgot your password?** link on the Trust Central login page.

1. Access the **Agency Admin** module either from the home page or the navigation menu
2. Click on the **Users** tab at the top of the page



- From the grid displaying all your users, click on the row displaying the user's whose information you want to modify

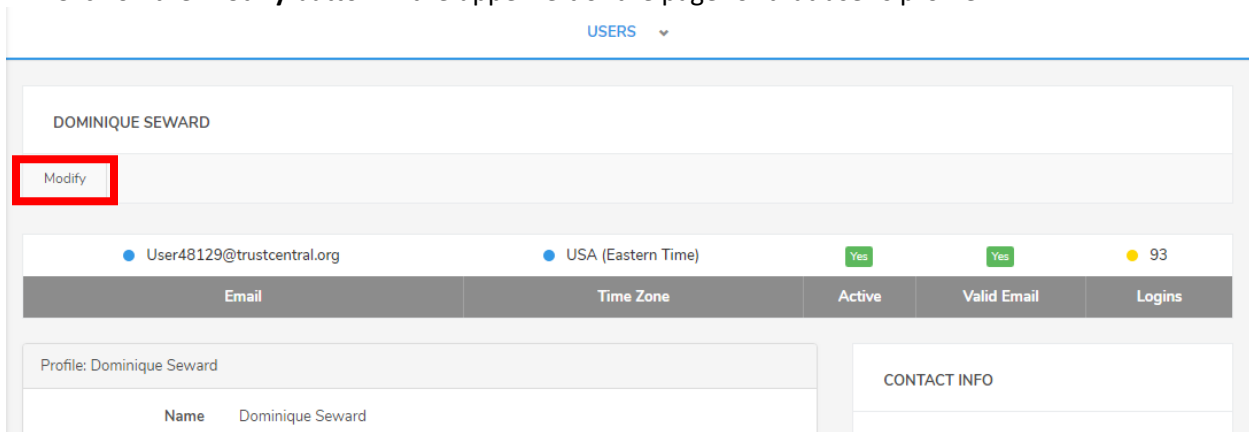
USERS ▾

+ Add Filter ▾ Save Reset Settings Download Merge Advanced Filter Select Mode ▾

Drop columns here for grouping along row or y axis

	Active	First Name ↑	Last Name	Email	Is User
1	1	Dominique	Seward	User48129@trustcentr...	1
2	1	Emily	Gunter	User46118@trustcentr...	1
3	1	Irene	Edwards	User46321@trustcentr...	1

4. Click on the **Modify** button in the upper-left of the page for that user's profile



USERS ▾

DOMINIQUE SEWARD

Modify

User48129@trustcentral.org USA (Eastern Time) Yes Yes 93

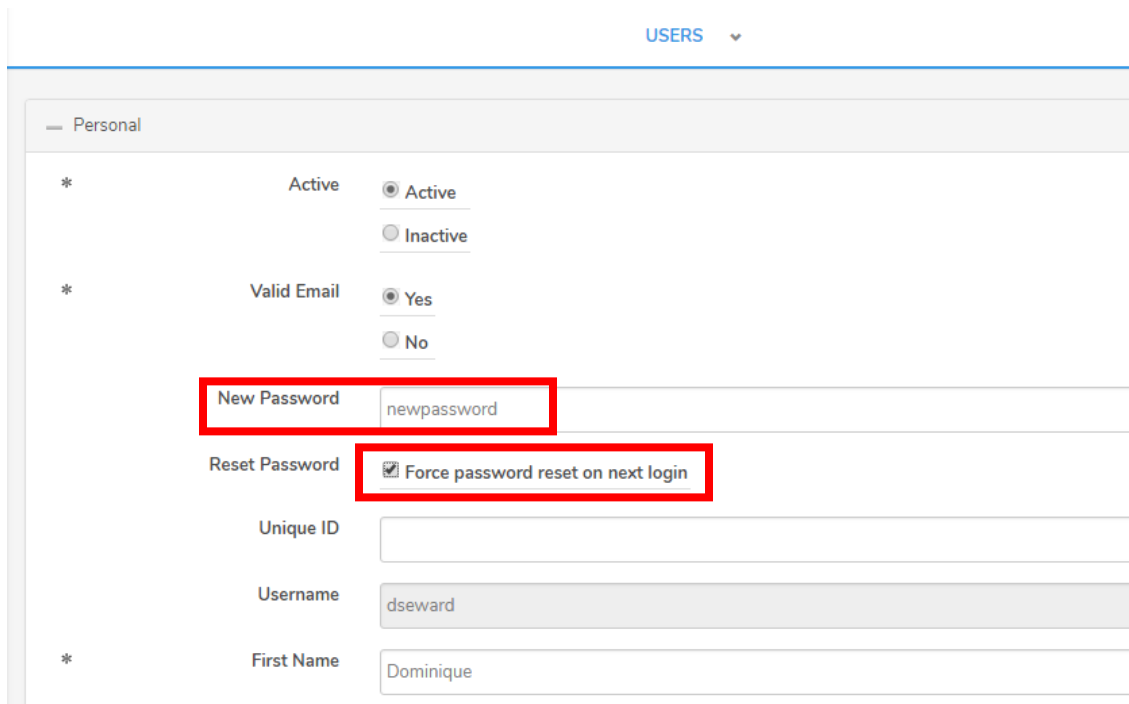
Email	Time Zone	Active	Valid Email	Logins
		Yes	Yes	93

Profile: Dominique Seward

CONTACT INFO

Name Dominique Seward

5. Now you will see the same page through which you created the user account containing all the information you originally entered. Update the information as needed, including the user's email, what modules they have access to and for which programs.
 - a. If resetting the password, it is recommended to set a temporary password then check the box to **Force password reset on next login** so users can set their password to their liking



USERS ▾

Personal

* Active Active
 Inactive

* Valid Email Yes
 No

New Password newpassword

Reset Password Force password reset on next login

Unique ID

Username dseward

* First Name Dominique

6. Scroll down and click **Save**