

## Acquiring cscForce user accounts for your Agency

Your agency should designate only **one** person to collect the information required and send to Tracy Hall at thall@childrensboard.org, to ensure that all decision makers are in agreement and to avoid requesting duplicate accounts.

For each user account you request we will need to know

1. First name, middle initial and last name
2. Phone number (with area code if other than 813)
3. Email address (make sure this is accurate as it may be used in the future to contact certain types of users or to send password reminders)
4. Which programs/contracts the user needs to access (if you do not specify which programs a user will be limited to, we will assume that the user needs access to all of them)
5. Which role (rights) the user needs, as detailed below

### Available user roles

#### Agency Overall

- A combination of all other Agency user roles, Overall users have the ability to edit and read all portions that any other Agency user can. Overall users are only restricted from editing areas that all Agency users are unable to edit, such as the contract Cover Sheet.

#### Agency Fiscal

- Fiscal users are only able to edit their own agency's programs' budgets, salaries and narratives, as well as those of any of their agency's subcontractors that provide budgets. They can also edit the list of subcontractors (Attachment 4).
- Fiscal users have read-only access to all other contract and program information, including demographics for both their own and any subcontractors' programs.

#### Agency Programmatic

- Programmatic users have the same access as the Overall users, except that they have **NO** access to read the budgets, salaries or narratives for their own agency's programs or their subcontractors'.
- Programmatic users can continue editing the non-contractual portion of the EE matrix during the executed ("complete") phase of a contract, and can edit demographic data at any time.

#### Agency Demographic

- Demographic users are limited to the EE matrix (which they can only read) and the demographics (for which they can enter or edit data for both their own and any subcontractors' programs).
- This role differs from the Programmatic role in that Demographic users will not be able to read any other portions of the contract outside of the EE matrix.
- **NOTE:** Although your agency may request accounts for Demographic users at this time, **the Children's Board will not be activating these accounts** until the Demographic portion of cscForce is fully developed and trainings have been offered, probably around the start of October.

#### Subcontractor Roles

- Subcontractors are able to view their lead agency's contract (except the budget, salaries, narratives and demographic data) by creating or printing a PDF.
- Subcontractors may edit their own budget, salaries and narratives, as well as their demographics. These are the only areas where they are required to provide data.

		CoverSheet	Scope	Budget/Salary	list of Subcontractors	Subcontractor's Budget	Addresses	Contractual EE	NONcontractual EE		Demographics		PDF contract	PDF budget	PDF EE
								Goals and Contractual Outcomes	any NONcontractual Outcomes and ALL Objectives, Activities, and Responsible Parties	Indicators, Data Sources, Time of Measurement*	Lead Agency's Demographics	Subcontractor's Demographics			
Negotiation (DRAFT)	Agency Overl	read	read	write/edit	write/edit	write/edit	write/edit	write/edit	write/edit	read	write/edit	write/edit	y	y	y
	Agency Fiscal	read	read	write/edit	write/edit	write/edit	read	read	read	read	read	read	y	y	y
	Agency Prog	read	read	[ NO ACCESS ]	write/edit	[ NO ACCESS ]	write/edit	write/edit	write/edit	read	write/edit	write/edit	y	NO ACCESS	y
	Agency Demo	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	read	read	read	write/edit	write/edit	NO ACCESS	NO ACCESS	y
	Sub Over	print lead contract & EE but NOT BUDGET/SAL/NARR					write/edit	print lead contract & EE but NOT BUDGET/SAL/NARR			[ NO ACCESS ]	write/edit			
	Sub Fiscal	print lead contract & EE but NOT BUDGET/SAL/NARR					write/edit	print lead contract & EE but NOT BUDGET/SAL/NARR			[ NO ACCESS ]	read only			
	Sub Demog	print lead EE but NOT CONTRACT/BUDGET/SAL/NARR					[ NO ACCESS ]	print lead EE but NOT CONTRACT/BUDGET/SAL/NARR			[ NO ACCESS ]	write/edit			
Submitted	Agency Overl	read	read	read	read	read	read	read	read	read	write/edit	write/edit	y	y	y
	Agency Fiscal	read	read	read	read	read	read	read	read	read	read	read	y	y	y
	Agency Prog	read	read	[ NO ACCESS ]	read	[ NO ACCESS ]	read	read	read	read	write/edit	write/edit	y	NO ACCESS	y
	Agency Demo	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	read	read	read	write/edit	write/edit	NO ACCESS	NO ACCESS	y
	Sub Over	print lead contract & EE but NOT BUDGET/SAL/NARR					read	print lead contract & EE but NOT BUDGET/SAL/NARR			[ NO ACCESS ]	write/edit			
	Sub Fiscal	print lead contract & EE but NOT BUDGET/SAL/NARR					read	print lead contract & EE but NOT BUDGET/SAL/NARR			[ NO ACCESS ]	read only			
	Sub Demog	print lead EE but NOT CONTRACT/BUDGET/SAL/NARR					[ NO ACCESS ]	print lead EE but NOT CONTRACT/BUDGET/SAL/NARR			[ NO ACCESS ]	write/edit			
Executed (COMPLETE)	Agency Overl	read	read	read	read	read	read	read	write/edit	read	write/edit	write/edit	y	y	y
	Agency Fiscal	read	read	read	read	read	read	read	read	read	read	read	y	y	y
	Agency Prog	read	read	[ NO ACCESS ]	read	[ NO ACCESS ]	read	read	write/edit	read	write/edit	write/edit	y	NO ACCESS	y
	Agency Demo	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	[ NO ACCESS ]	read	read	read	write/edit	write/edit	NO ACCESS	NO ACCESS	y
	Sub Over	print lead contract & EE but NOT BUDGET/SAL/NARR					read	print lead contract & EE but NOT BUDGET/SAL/NARR			[ NO ACCESS ]	write/edit			
	Sub Fiscal	print lead contract & EE but NOT BUDGET/SAL/NARR					read	print lead contract & EE but NOT BUDGET/SAL/NARR			[ NO ACCESS ]	read only			
	Sub Demog	print lead EE but NOT CONTRACT/BUDGET/SAL/NARR					[ NO ACCESS ]	print lead EE but NOT CONTRACT/BUDGET/SAL/NARR			[ NO ACCESS ]	write/edit			

### What is accessible in your contract during different phases

#### Negotiation (“draft”) phase

- Users are able to edit their contract, EE matrix and demographics based on their rights to the particular areas.

#### Submitted phase

- All users will have read-only access to the contract and EE matrix during the Children’s Board’s review and approval phase.
- Users with demographic data editing rights will be able to edit demographics during this and all phases.

#### Executed (“complete”) phase

- All users will have read-only access to the contract and CONTRACTUAL portion of the EE matrix (goals and contractual outcomes).
- Users with EE matrix editing rights will again be able to edit the NON-contractual portions of their EE matrix (non-contractual outcomes, process objectives, activities and responsible parties). This part of the EE matrix is considered a “living” document and is purposely left open for your flexibility.
- Users with demographic data editing rights will be able to edit demographics during this and all phases.