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 is, 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**

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: SAMIS 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: SAMIS Programmatic** - access to view and enter programmatic data, including participant demographics, attendance and performance outcomes

6. Scroll down the **SAMIS Configuration** section and add a checkbox next to each of the programs that user should have access to.

![SAMIS Configuration](image)

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

![Agency Admin Module](image)

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.
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.

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.

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

   [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.]

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**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
3. From the grid displaying all your users, click on the row displaying the user’s whose information you want to modify

![User Grid Display](image-url)
4. Click on the **Modify** button in the upper-left of the page for that user’s profile

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

6. Scroll down and click **Save**