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1 Introduction

1.1 Document Purpose

The purpose of this document is to outline the administrative tools available within Advanced Shared CROMERR Services. The consequent sections will provide descriptions on each tool, and all the different types of role permissions that are available for each Help Desk role.

1.2 Topics Covered

This document will explain the functionality of the various tools available within the Admin Tools panel on the Dashboard Homepage. The following sections of this guide will include how to create an Applicable Help Desk Roles account and how to use these Help Desk tools.

- **Section 2** outlines how a user is granted Help Desk access.
- **Section 3** explains the functionality of each tool available in the Admin Tools panel including:
  - User Management
  - Pre-Registration
  - Pending Requests
  - CROMERR Administration
  - Alert Publishing
  - Themes

  Section 3 also explains how Applicable Help Desk Roles can grant Help Desk access to other user accounts.

- **Exhibit A-1** displays the Help Desk Role permissions. To view, follow the cross references Applicable Help Desk Roles and Exhibit A-1, or scroll to the bottom of this guide.
2 Access to Help Desk

The Shared CROMERR Services-Advanced Services System offers the ability to dynamically provision roles and offer functional tools that provide maximum flexibility for establishing and maintaining role-based access to CROMERR advanced services.

Shared CROMERR Advanced Services allows for three levels of Help Desk access, outlined below:

- Centralized Help Desk – can manage users across all partners and all programs.
- Partner Help Desks – can manage users for a designated partner. This encompasses all programs the partner may have. Note: a user may be granted access to one or more partners. For example: a user may be granted access to PA and NY partners, but not to LA.
- Partner-Program Help Desks (State CMDP Administrators) – can manage users for a designated partner-program. Note: a user may be granted access to one or more partner-programs. For example: a user may be granted access to PA’s ABC and XYZ programs, but not to MNO. For the purpose of this document the term Program refers to Compliance Monitoring Data Portal (CMDP).

Each of these roles has been granted access to different Help Desk tools. This is outlined in Exhibit A-1 Applicable Help Desk Roles.

Shared CROMERR Advanced Services administrators (Central Help Desk) will work with Partners and CMDP to determine which Help Desk roles best fit the need of each implementation. Shared CROMERR Advanced Services will then grant individuals access by emailing an invitation to register as the applicable role.

SCS Advanced Services support the ability to provision multiple methods of Registration for multiple CROMERR compliant business processes:

- Open Registration: Ability for a registrant to identify themselves and request specific partner program roles that are openly published and optionally direct access requests to Partner or Partner-Program Help Desks conditionally upon additional identity proofing requirements.
- Closed Registration: Ability for a Help Desk to register a user (identity information defined) or pre-register users (identity information drafted but confirmed by registrant). The registrant does not have the ability to add roles which are closed, and they will not populate in the Role Dropdown during registration. For the purpose of this document, all Help Desk roles including Central, Partner, and Partner-Program are closed. This means that Help Desk roles must be pre-registered by another Help Desk shown later in Section 3.2. Non-Help Desk roles may be provisioned for closed registration such as State Compliance Officer. The appropriate Help Desk must also pre-register those roles.

Note: Central Help Desk may pre-register all levels of Help Desk users. Partner Help Desk may only pre-register other Help Desk users of the same partner, and Partner-Program Help Desk
users can only be pre-registered by a Partner Help Desk within the same partner or Central Help Desk.

2.1 Accepting a Help Desk Pre-registration Invite

The Help Desk roles are closed roles, and must be Pre-registered (Section 3.2) by another Help Desk user.

The Pre-registration invitee will receive an email from SCS Administrator with subject “Pre-Registration Email Verification Request” as shown in Exhibit 2-1. This email invitation contains the Pre-registered user’s unique Customer Retrieval Key (CRK).

Note: CRKs are unique per invitation and may only be used once. CRKs may be re-sent if not used.

Exhibit 2-1

The user will select the link containing the CRK and is brought to the pre-registration log in page.

Note: If the Pre-registered user has an account or multiple accounts tied to that email address, they will be given the option to create a new account or choose an existing account for which they wish to add the pre-registered role as shown in Exhibit 2-2. If the pre-registered user does not have an existing SCS account tied to their email address, they will see the pre-registration landing page as shown in Exhibit 2-3.
For the purpose of this document a new account will be created. The user selects the ‘Create New Account’ button and is brought to the Terms and Conditions page for the pre-registered partner that the user must accept as shown in Exhibit 2-4.

Note: Depending upon role, the user may additionally be asked to accept Rules of Behavior (RoB).
Once the pre-registered user accepts the partner’s Terms and Conditions, they will have a chance to review and edit their account owner information that was entered by the Applicable Help Desk Roles during pre-registration and enter account information such as User ID, Password, and Security Questions as shown in Exhibit 2-5.

Note: Email address may not be edited.
After all account information is complete the user selects the ‘Continue’ button, the user is asked to confirm their preselected organization as shown in Exhibit 2-6. The user may change their pre-selected organization and or phone number if needed.

Note: The Applicable Help Desk Roles may choose not to pre-select the users organization. Pre-selecting the pre-registered user’s organization is optional. The pre-registered user will have to select their organization before continuing.
Once the pre-selected user selects the ‘Continue’ button on the Choose an Organization page they will be directed to their Dashboard page with the pre-registered role activated as shown in Exhibit 2-7.
3 Help Desk Tools

The SCS Advanced Services Help Desk tools are accessible via the Admin Tools located on the Dashboard homepage near the bottom left of the webpage. The Admin Tools panel is only accessible after a Help Desk role has been activated and the account holder has logged in. The Admin Tools panel includes hyperlinks to any of the following tools:

- User Management
- Pre-Registration
- Pending Requests
- CROMERR Administration
- Alert Publishing
- Themes

Note: based on the Help Desk roles granted, the account holder may see different combinations of the above tools as shown in Exhibit A-1. SCS Central Help Desk role has access to all tools. Exhibit 3-1 shows the Admin Tools panel located on the Dashboard Homepage for a Central Help Desk user.

Exhibit 3-1 Admin Tools
3.1 User Management

The User Management tool allows Help Desk individuals to conduct searches for users and make any needed modifications to accounts. The User Management tool is accessed via the User Management hyperlink listed first in the Admin Tools panel. Exhibit 3-2 shows the location of the User Management hyperlink in the Admin Tools panel.

Exhibit 3-2 User Management Hyperlink

3.1.1 User Management Search

When the User Management link is clicked, Help Desk users are brought to the User Management – Search page. This search page allows the Help Desk to search for accounts, or a specific account, by searching one or more of the following criteria:

- User ID
- First Name
- Last Name
- Email
- Partner
- Program Service (CMDP)
- Role
- Program ID
- Organization Name
- Phone Number

“Search”, “Reset”, and “Back” buttons are provided on the bottom left of this page. The Applicable Help Desk Roles will enter the information into one or more of the textboxes and select the “Search” button. The User Management – Search page is shown in Exhibit 3-3.

Note: The Partner and/or Program Service (Program) dropdowns may be filtered to only show available options (based on the Partners/Programs you have been granted access to). For
example; if you have only been granted access to the ‘VA’ partner, you will only see ‘Virginia’ in the dropdown.

Note: The available program for the purpose of this document is CMDP

**Exhibit 3-3 User Management - Search**

3.1.2 User Management Search Results

After the search is conducted, the Applicable Help Desk Roles will be brought to the User Management Search Results page. The matching search results are populated in a sortable table with the following columns:

- Name
- User ID
- Registration Date
- Last Login Date
- Question/Answer
- Password

Matching search results will also be filtered based on the permissions that have been granted to you. For example: if USER1 has registered an account with AZ; a Partner Help Desk for CA will not see USER1. Partner Help Desk will only see users registered for Partner CA.

Note: Ability to reset passwords and credentials is limited by the Partner authorities provided. Central has authority but Partners only have authority to reset based on the partner-program-role authority they are given. Certain functions such as Password column may be empty if unauthorized. Refer to Exhibit A-1 Applicable Help Desk Roles.

Exhibit 3-4 shows the view of the User Management Search Results.
The Question/Answer column of the table offers a hover-over feature such that when the account-holder moves the cursor over the question/answer box, it shows the secret questions/answers they provided for password reset assistance. These questions/answers are used to verify individuals’ identities when they forget their passwords and need them reset electronically or when they need assistance from the Central or Partner Help Desk. The Question/Answer symbol can also be clicked, which will display a modal pop-up view of the questions/answers for easier viewing.

Exhibit 3-5 shows the view of the modal pop-up displaying the account registrant’s security questions and answers.

The password lock symbol allows a Central or Partner Help Desk account holder to initiate a password reset for an account. The Help Desk member must first click this symbol, which will bring up the User Account Information-Password Reset page as shown in Exhibit 3-6.

Note: A password reset will unlock a Password Locked account.
If the registrant is associated with multiple email addresses, the Help Desk may choose which email address the password reset will be sent to via a dropdown selection. In order to reset the password, the Applicable Help Desk Roles must click the “Auto-Generate Password” button. An email will automatically be sent to the selected email address with instructions on how to create a new password. Exhibit 3-7 displays the confirmation bar the Applicable Help Desk Roles will receive once the password reset has been sent.
3.1.3 User Management - User Detail

Names are presented as hyperlinks on the ‘User Management - Search Results’ page as shown in Exhibit 3-4. Following a hyperlinked name will bring the Help Desk to that account’s User Details. The User Detail page for an account is shown in Exhibit 3-8.

User Details is split into the following sections:

- User Account Information
- User Organization Information
- Program Flow Information

Note: The User Details view is based on the level of Help Desk access. Certain sections may not be available. Refer to Exhibit A-1.
3.1.3.1 User Account Information

The first panel of ‘User Management – User Detail’ is User Account Information. Here, the Applicable Help Desk Roles can view information about that user’s account such as:

- User ID
• User Name
• Registration Status
• Registration Date timestamp
• Previous Log In timestamp
• Password Expiration timestamp
• Security Questions and Answers

A user’s Registration Status will show any of the following values:

• Valid: user can log in and can be accessed
• Locked: the user’s account has been deactivated and the user will not be able to log in. Accounts can only be closed by a Help Desk user and will additionally deactivate all roles. Used in instances where a user has left a position.
• Password Locked: the user has exceeded the maximum number (3) of log in attempts and must initiate a password reset.

The security questions are the questions that the user chose during the account registration process in the event that the password is forgotten. A close up of the User Account Information panel is shown in Exhibit 3-9.

**Exhibit 3-9 User Account Information**

![User Account Information](image)

All Help Desk roles have the ability to edit the User Account Information for registrants by selecting the blue “Edit Account” hyperlink found in the top right corner of the User Account Information Panel. Following this hyperlink, the Help Desk roles will be brought to ‘User Management – Edit User Detail’ shown below in Exhibit 3-10. From here, Applicable Help Desk Roles have the ability to change user information such as: Title, First Name, Last Name, and Security Questions.

When making updates to Name details, the Help Desk should take into consideration any implications it may have such as impacts to any Electronic Signature Agreements (ESAs) the user has signed.

Note: Some levels of Help Desk may be restricted in the fields that can be edited. Refer to Exhibit A-1 for clarification.
Partner Verification Index can also be set from this screen via expandable headings. This index is the measure of identity assurance between the partner and user. Clicking the Partner name, will expand and display the details for these indexes. The Applicable Help Desk Roles have the ability to view and set both the Electronic and Paper Score.

The Electronic Score for a user is determined by the 3rd party identity proofing service LexisNexis. This is to be sure that specific user roles are the entities they say they are. The electronic scores are as follows:

- **None** – the user has not been identity proofed by LexisNexis (either failed or has never attempted).
- **CROMERR – Minimum** - indicates the user meets the CROMERR Legal Certainty Minimum Standard using LexisNexis.
- **CROMERR – Exceeded** - indicates the user exceeds the CROMERR Legal Certainty Minimum Standard using LexisNexis.

Note: The Electronic Score is determined by the results returned by the 3rd party identity proofing service LexisNexis during the registration process and is not to be manipulated by Applicable Help Desk Roles.
The Paper Score is to be set by the Help Desk to determine the level of the user’s identity assurance. Paper Scores are determined by the mail-in paper ESA form and can be set in the absence of LexisNexis or in addition to LexisNexis. The Paper Score options are as follows:

- **Signature-Program** – indicates the user has previously provided a wet ink signature to the program office.
- **Signature** – indicates the user has provided a wet ink signature for an agreement.
- **Signature-Letterhead** – indicates the user has been verified based on the receipt of a signature on company letterhead.
- **Signature-Phone** – indicates the program office has verified the user's identity by making a phone call to the phone number provided.
- **Signature-Notary** – indicates the user's ESA has been notarized.

Note: Certain levels of Help Desk may restrict edits based on the access you have been granted. For example, a Partner Help Desk for GA would only be able to edit the users’ paper verification for GA.

The expanded Partner Verification Index for the partner Test State X1 is shown by Exhibit 3-11. Additionally, if changes are made to a user’s name and the user has previously signed an ESA, the Help Desk should reset the user’s identity proofing scores so that the user can be prompted to sign a new ESA that reflects the name change.

Note: The user account below contains active roles from partners Test State X1 and Connecticut.
From the ‘User Management – Edit User Detail’ page, the Central and Partner Help Desk have the ability to lock a user’s account. Select the “Lock Account” button from the button options on the bottom of the page and click the red “Yes” button to lock the account as shown in Exhibit 3-12. Locking a user’s account will deactivate all of the user’s current roles, and will prevent the user from logging in.
When the users account is locked successfully, the Applicable Help Desk Roles will be directed back to the ‘User Management – User Detail’ page with a green confirmation bar. The Registration Status will be “Locked” and all roles linked to that user’s account will have an “Inactive” status as shown in Exhibit 3-13.
To unlock the User’s account, the Applicable Help Desk Roles must navigate back to ‘User Management – Edit User Detail’ via the “Edit Account” hyperlink. The “Unlock Account” button must then be clicked. The Applicable Help Desk Roles will be asked if they are sure they wish to unlock the user account via the green and red “Yes”/“No” buttons shown in Exhibit 3-14.
When the Applicable Help Desk Roles select the green “Yes” button to unlock the account, they will be directed back to the User Detail page with a green confirmation bar at the top of the page. The Registration Status in User Account Information Panel will read “Valid”. Exhibit 3-15 shows the “Unlock Account” confirmation. Note: reactivating an account will not reactivate the roles that were deactivated, but will allow the user to log back in to the system. The Applicable Help Desk Roles must reactivate the account roles manually after unlocking.
From ‘User Management – Edit User Detail’, the Central Help Desk can also Unlock the User’s password. To unlock a user’s password, select the “Unlock Password” button on the bottom of the page. The Applicable Help Desk Roles will be asked if they are sure they wish to unlock the password via green and red “Yes”/ “No” buttons as shown by Exhibit 3-16. This tool is useful for when a user has exceeded the maximum number of failed logins but knows the password and does not wish to reset it.
If Help Desk elects to unlock the user’s password by clicking the green “Yes” button, there will be a redirect back to the User Detail page with a green confirmation message at the top of the screen shown in Exhibit 3-17.
The last function of ‘User Management – User Detail’ is resetting a user’s eSIG-PIN. The eSIG-PIN represents the CROMERR 20-5-1 questions that a user must select in order to electronically sign documents. The Applicable Help Desk Roles will select the “Reset eSIG-PIN” button, then select “Yes” as shown in Exhibit 3-18.
After selecting the green “Yes” button, the user will receive an email with further instructions to reset the eSIG-PIN and a green confirmation bar will appear at the top of the page as shown in Exhibit 3-19.
3.1.3.2 User Organization Information

User Organization Information is the middle panel located on the ‘User Management – User Detail’ page shown in Exhibit 3-8. This panel displays information about the organizations linked to the user account including:

- **Organization Number** – what organization this is for a specified user
- **Organization Information** – includes organization name and address.
- **Contact Information** – includes the user’s email address and the user’s phone number at that organization
- **SCS ESA** – displays the status of the Electronic Signature Agreement between the User and the Organization

Exhibit 3-20 shows a close-up view of the User Organization Information.

Note: The key symbol denotes the User’s primary organization. The primary organization determines the email address used for email communications.
Exhibit 3-20 User Organization Information

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Phone: (111) 111-1111 | Received |
| 2     | CITY OF 38030 (X1)  
400 W Main Street, Fairfax, VA US 22033 | Org.com  
Phone: (111) 111-1111 | None |

The Organization names in the ‘Organization Information” column are provided as hyperlinks. When these hyperlinks are followed, the Help Desk is brought to the ‘User Organization Information’ edit page as shown in Exhibit 3-21. Here, the Applicable Help Desk Roles have the option of updating the user’s email address, phone number, and phone number extension.

Applicable Help Desk Roles can change the Primary Organization via the dropdown with “Yes”/“No” options. The SCS ESA Status between the user and organization can also be set or updated. The SCS ESA status dropdown may be set to “None” or “Received”.

As noted in Section 3.1.3.1, if changes are made to a user’s name, and the user has previously signed an ESA, the Help Desk should reset the user’s ESA status to ‘None’ so that the user can be prompted to sign a new ESA that reflects the name change.

Note: Certain levels of Help Desk may restrict organization edits based on the access granted. For example, a Partner Admin for GA would only be able to edit the users’ organizations associated with the GA partner. Different types of Help Desk roles will also have restrictions on the content which they may edit. Refer to Exhibit A-1.
Exhibit 3-21 Edit User Organization Information

3.1.3.3 Program Flow Information

The bottom panel located on the ‘User Management – User Detail’ page is the Program Flow Information shown in the red box in Exhibit 3-22.
The Program Flow Information panel displays the following information:

- Partner
- Dataflow (Program)
The Help Desk can add a role in two different ways, depending on what kind of role they wish to add.

Note: This method of adding roles is discouraged. Help Desk users are encouraged to pre-register other users.

If the Help Desk wishes to add a role to an existing Partner/Program/Organization, they can do so by clicking the green “plus” sign in the ‘Add Role’ column. For example, in Exhibit 3-22, clicking the plus sign would add another CT-CMDP role to the ‘Test CT CMDP Public Water System Org (CT)’ organization.

If the Help Desk wishes to add a role, with a different partner, program or organization, they can do so via the “Add Program Service” hyperlink in the top right corner of the panel. In the “Status” column, Applicable Help Desk Roles have the ability to activate, approve, reject, or deactivate a user’s role. A close up of the Program Flow Information panel is provided by Exhibit 3-22.

Note: the user roles a Help Desk user can modify may be restricted to the Help Desk role type. For example, a PA-CMDP Help Desk will not be able to modify a UT-CMDP role.

When a role is added by clicking the plus-mark symbol in the “Add Role” column, the Help Desk will be brought to an “Add Role” page, shown in Exhibit 3-23. As shown, the Partner, Program Service Code (Program), and Organization Name will already be populated.
A Program can also be added to a user’s account by clicking the “Add Program” hyperlink in the top right corner of the Program Flow Information panel. Refer to Exhibit 3-22 for the location of the “Add Program” hyperlink.

When the link is clicked, the Help Desk is brought to the “Add Program” page, where the following must be entered on behalf of the user:

- Partner
- Program Service (Program)
- Role
- Organization
- Email and Email Confirmation
- Phone Number
- Fax Number (optional)
- Program ID

Due to the complexity involved with organization types, Organizations will not be searchable. Instead, Organization options will be presented in a dropdown, populated with all the organizations that are available to the Partner-Program-Role selected.

Additionally, Program ID is a required value and defaults to ‘N/A’ when no information is collected.
Once all required information is provided, the “Add Selected Program” button at the bottom left of the panel must be clicked to add the Program. The “Add Program” page is shown by Exhibit 3-24.

Note: Certain levels of Help Desk may restrict role updates based on the access granted. For example, a Partner Admin for NY would only be able to add NY roles.

**Exhibit 3-24 Program Flow Information – Add Program**

Once the “Add Selected Program” button is selected, the role will be successfully added unless additional information is required. For example, if identity proofing is required for the new role, the Help Desk will be prompted to update the Paper score before activating.

Note: No electronic score option is given because it is assumed that the Help Desk received a paper ESA manually requesting access the role. Help Desk cannot receive electronic scores manually.

In instances where identity proofing is required, Help Desk is brought to the ‘Update Paper Index’ page. This page provides the User ID, User Name, Program, Role, and Subject, and then gives the Help Desk the option to set the ESA Status and the Paper Index via the dropdown shown in Exhibit 3-25. The Paper Index definitions can be found in Section 3.1.3.1.
Note: Some Applicable Help Desk Roles will be able to add a Help Desk program to an account. For example, Central Help Desk can create all Help Desk Roles. The Partner Help Desk may only be able to add Help Desk privileges within the same Partner. The Partner-Program Help Desk may only grant Help Desk privileges within the same Partner and Program Service.
The three different types of role statuses that Help Desk roles can manipulate are shown above in Exhibit 3-26.

- **Awaiting Approval** – shown when a role requires approval after a user has met all registration requirements. To activate the role, the Help Desk must click ‘Approve’. The Help Desk can also reject the request by clicking the ‘Reject’ link.

- **Awaiting Electronic Signature Agreement** – shows when a user has either failed or opted out of LexisNexis identity proofing. In instances where a user has opted out of an electronic ESA, the user must submit a paper ESA. A Help Desk user is responsible for verifying that the paper ESA has been received before clicking the ‘Activate’ link.

- **Active** – shown when a role is active. An active role can be deactivated by clicking the ‘Deactivate’ link.

Values in the Dataflow (Program) column possess a hover-over feature that shows Program Service Code (Program), Program ID Type, and Program ID Value. Program ID types and values are optional metadata that can be collected for a role during registration. Program ID values may be blank, if the user role does not collect it. Exhibit 3-27 shows the dataflow hover-over feature.
When the Dataflow (Program) column hyperlinks are clicked, the Help Desk views a modal pop-up displaying the Program Service Code (Program), Program ID Type, and Program ID Value. The Program ID Value can be edited here. Exhibit 3-28 shows the ‘Edit Program Service’ modal pop-up.

Note: Certain levels of Help Desk may restrict Program ID edits based on the access granted. For example, a CT Partner Help Desk would only be able to edit the role information for roles pertaining to CT.

![Exhibit 3-28 Edit Program ID Value](image)

### 3.2 Pre-Registration

The Pre-Registration tool is used to invite other individuals to register an account in the Shared CROMERR Services-Advanced Services System. The Pre-Registration hyperlink is the second link offered in the Admin Tools panel shown in Exhibit 3-29.
3.2.1 Create New Invite

Once the Pre-Registration link is selected, the Applicable Help Desk Roles will be brought to the Pre-Registration page where the “Create New” button must be selected.

Exhibit 3-30 shows the Pre-Registration page with the “Create New” button:

![Exhibit 3-30 Pre-Registration]

Once the Help Desk selects the “Create New” button, they will be prompted to select details for the user account they are initiating, by selecting Partner, Program, and Role. Note: Partner, Program, and Role selections made by Help Desk will not be editable by the end users.

Note: Central Help Desk users will have the ability to pre-register all roles. Partner Help Desks will have the ability to pre-register roles tied to their partners. Partner-Program will have the
ability to pre-register the partner, program, and roles they have been granted access to. Exhibit 3-31 shows the Partner selection.

**Exhibit 3-31 Select Partner**

Once the partner is selected from the partner options, the Applicable Help Desk Roles must choose a program for the user they are registering. The list will show only the programs that are available to that partner. The program options for the Connecticut partner are “CMDP: Compliance Monitoring Data Portal” and “HD: Help Desk”. Exhibit 3-32 shows the selection of a program.
Exhibit 3-32 Choosing a Program

After the Applicable Help Desk Roles select the program, they must then choose the role for which they wish to register the new user. Only the roles available for that partner and program will populate to the options list. Exhibit 3-33 shows the selection of roles for this particular Partner, Program, and level of access.

Exhibit 3-33 Choose a Role

Exhibit 3-34 shows an example of the Continue button being visible when Partner, Program, and Role have been chosen.
After the Applicable Help Desk Roles have chosen the Partner, Program and Role, they will be brought to the Account Owner page. From this page, the Applicable Help Desk Roles must provide certain information about the person they wish to pre-register including:

- Title (not required)
- First Name (required)
- Middle Initial (not required)
- Last Name (required)
- Suffix (not required)
- Email Address (required)
- Confirm Email (required)

Note: with the exception of email addresses, the user will be able to confirm and/or make edits to the information provided by the Help Desk when completing the pre-registration process.

Help Desk is also given the option, in the form of a checkbox, to withhold the Customer Retrieval Key (CRK) from the pre-registered user. If this checkbox is marked, Help Desk will need to manually provide the user the CRK code (e.g., via email or over the phone). Green check marks will appear next to each textbox once all required information is entered. Once they appear, the Applicable Help Desk Roles will select the “Continue” button.

The Exhibit 3-35 shows the ‘Pre-Registration Account Owner’ information page with all required information.
The Help Desk will then be brought to the ‘Choose an Organization’ page where they will have the option to choose an organization for the pre-registered user. Providing an organization is not required for sending a Pre-Registration invite (but must be completed by the Pre-Registered user to complete their registration). Select the “Continue” button to proceed. Exhibit 3-36 shows the ‘Choose an Organization’ page:
The Applicable Help Desk Roles will be directed back to the initial ‘Pre-Registration’ page with a green bar indicating that the pre-registration request has been sent. The text will provide Help Desk with the CRK issued, and verify the email address to which the request was sent. Exhibit 3-37 shows the confirmation message in the green bar.

Exhibit 3-37 Pre-Registration with Success Message

3.2.2 Search Pre-Registration

The Pre-Registration Search Panel is shown in Exhibit 3-38. Here, the Help Desk will be able to search for pre-registered users by entering information into one or more of the following search criteria:

- First Name
- Last Name
- Email
- Partner
- Program Service (Program)
- Role
- CRK Status
• CRK
• CRK Status

The CRK Status dropdown will be populated with ‘Active’, ‘Expired’ and ‘Used’ options. Refer to Section 3.2.3 for more information.

Note: Partner, Program Service and/or Role options may be restricted based on the Help Desk access granted.

Once one or more of the search criteria are entered into the textbox, the user must then click the “Search” button on the bottom left of the search panel as shown in Exhibit 3-38 below.

Exhibit 3-38 Pre-Registration Search

3.2.3 Pre-Registration Search Results

After conducting the search, Help Desk will be brought to the Pre-Registration search results page shown in Exhibit 3-39. The results are organized as a table with the following columns: Name, CRK, Details, Program ID, CRK Status, and Actions. The columns can be sorted by alphabetical or numerical order by clicking the arrows next to each column title.
CRK’s can be updated depending on their current status:
• Active – denoted by the green check mark, CRK’s that have been issued and not yet used by the invitee.

• Expired – shown by the red circle-backslash symbol, these are CRK’s that have been manually expired by Help Desk.

• Used – used CRKs are denoted by the gray check mark. These CRK’s have been used by an individual to complete the account creation. Once a CRK is used, it cannot be used again.

From the Pre-Registration Search Results page, Applicable Help Desk Roles view the CRK Status as shown by symbols. These symbols possess a hover-over feature that indicates whether the CRK is Used, Active, or Expired.

In the Actions column in Exhibit 3-40, the Applicable Help Desk roles can:

• Expire “Active” CRKs – CRK’s can be expired if they were issued by mistake or if they no longer apply.

• Resend “Active” CRKs – resending a CRK can be used when a user cannot locate their Pre-registration email. Clicking ‘Resend’ will re-send the Pre-Registration email.

• Activate “Expired” CRKs – can be used if a CRK was accidentally expired, or needs to be reactivated.

### Exhibit 3-40 CRK Status Close-up

<table>
<thead>
<tr>
<th>Name</th>
<th>CRK / Shared Secret</th>
<th>Details</th>
<th>Program ID</th>
<th>CRK Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>asdf asdf <a href="mailto:eric.matz@cgi.com">eric.matz@cgi.com</a></td>
<td>4cb730f4ef3</td>
<td>Program Services: DEMO Partner: DEMO Role: Certifier</td>
<td>N/A</td>
<td></td>
<td>(Activate)</td>
</tr>
<tr>
<td>asdf asdf dfasdfsdf</td>
<td>e68e553a6312</td>
<td>Program Services: CMDP Partner: CT Role: Private Lab CMDP Administrator</td>
<td>N/A</td>
<td></td>
<td>(Activate)</td>
</tr>
<tr>
<td>asdf asdf <a href="mailto:eric.matz@cgi.com">eric.matz@cgi.com</a></td>
<td>8b7f9f9310d</td>
<td>Program Services: CMDP Partner: CT Role: Private Lab Certifier</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>asdf asdf <a href="mailto:eric.matz@cgi.com">eric.matz@cgi.com</a></td>
<td>06b76b007c5c</td>
<td>Program Services: CMDP Partner: CT Role: Private Lab Certifier</td>
<td>N/A</td>
<td></td>
<td>(Activate)</td>
</tr>
<tr>
<td>asdf asdf eric.matz@cgi:federal.com</td>
<td>C893b7a43e4c</td>
<td>Program Services: CMDP Partner: CT Role: Private Lab Certifier</td>
<td>N/A</td>
<td></td>
<td>(Expire) (Resend)</td>
</tr>
</tbody>
</table>

When the “Activate” option is selected, a green confirmation bar will appear as shown in Exhibit 3-41.
When the Applicable Help Desk Roles choose to expire the CRK, a green confirmation bar will appear as shown in Exhibit 3-42.
If the Help Desk user wishes to Activate or Expire multiple CRKs at once, check the desired entries using the checkboxes provided, and then choose the desired action at the bottom of the page. A pop-up asking to confirm the action will appear as shown in Exhibit 3-43.
3.3 Pending Requests

The Pending Requests tool allows the Help Desk to search for user roles that are pending activation. Pending Requests can be used to activate roles that require an ESA and/or roles that require additional approval. The Pending Requests tool is located in the Admin Tools panel on the Dashboard shown in Exhibit 3-44.

Note: Using the Pending Requests tool is the preferred method to approve or reject requests over User Management/User Detail/ Program Flow Information as outlined in Section 3.1.3.3.
When the Pending Requests hyperlink is clicked, the Help Desk is brought to the ‘Pending Requests – Search’ page where Applicable Help Desk Roles may search against one or more of the following criteria:

- User ID
- First Name
- Last Name
- Email
- Partner
- Program Service (Program)
- Role
- Program ID
- Organization Name
- Phone Number

When all desired information is entered into the textbox or textboxes, the Applicable Help Desk Roles will click the “Search” button. “Reset” and “Back” buttons are provided as well. The ‘Pending Requests – Search’ page can be seen in Exhibit 3-45.
Exhibit 3-45 Pending Requests – Search

Search results are populated to a table as shown by Exhibit 3-46. The chart is organized by:

- **Requestor Information** – provides the Name, Username, and Email Address of the account
- **Requestor Details** – provides the Organization Name, Program Service (Program), Partner, Role, Program ID, and contains a “View Details” hyperlink to show the address of the organization
- **Request Date** – provides the date and time of the request

Each result also lists the Current Electronic Score and contains a dropdown used to set the current Paper Score. Paper Score definitions can be found after Exhibit 3-10. Requests may or may not require a paper score to be set, depending on what is required for a role and what the user currently has set.

- Role requires approval only
  - These role types will always show in Pending Requests because they always require Help Desk approval. However, the Help Desk will not be required to set a Paper Score. The Help Desk will only be responsible for confirming with the appropriate partner and/or program to make sure the individual that is requesting access should be granted access
- Role requires Identity Proofing
  - If a role requires Identity Proofing, it will only show in Pending Requests if the user did not pass or opted out of LexisNexis. In this instance, a user should have submitted a paper ESA in lieu of LexisNexis. The Help Desk must confirm
receipt of the ESA before setting a paper score. Refer to Section 3.1.3.1 for guidelines on what score should be selected.

- Role requires approval and Identity Proofing
  - If a role requires both, requests will always show up in Pending Requests. There are two scenarios for when a role requires approval and identity proofing:
    - If the user passed LexisNexis, the request will still show up because the role requires approval. You can tell if the user passed LexisNexis because the ‘Current Electronic Score’ will be set to something other than ‘Not Set’. The Help Desk will not need to set a paper score, but will need to approve it.
    - If the user did not pass LexisNexis (Current Electronic Score is ‘Not Set’), then the Help Desk must confirm a paper ESA and make the appropriate dropdown selection before approving.

Exhibit 3-46 Pending Requests – Search Results

To approve a request, the Help Desk will set the appropriate paper score and click the checkbox to the left. Once the request is selected, click the “Approve Selected Requests” button. The Help Desk will be brought to the ‘Pending Requests – Approve Requests’ page shown by Exhibit 3-47. Here, the Applicable Help Desk Roles will be able to review the requestor information once more before clicking the “Approve Requests” button.
Exhibit 3-47 Pending Requests – Approve Requests

When the request has been successfully approved, the request will disappear from the results table, and the Applicable Help Desk Roles will see a green confirmation bar as shown in Exhibit 3-48.

Exhibit 3-48 Approve Pending Requests Confirmation

Note: The results that populate in “Pending Requests – Search Results” are dependent on the level of access the Help Desk user has been granted. These results list account roles in the “Awaiting Approval” status, and account roles that have not completed Identity Proofing.
3.4 CROMERR Administration

The CROMERR Administration tool is used by Applicable Help Desk Roles to manage all documents that have been electronically signed. The CROMERR Administration tool is accessed via the CROMERR Administration hyperlink. Exhibit 3-49 shows the location of the CROMERR Administration hyperlink in the Admin Tools panel.

Exhibit 3-49 CROMERR Administration Hyperlink

When clicking the hyperlink, the Help Desk is brought to the ‘CROMERR Administration – Search’ view seen in Exhibit 3-50. Using this search tool, Applicable Help Desk Roles are permitted to search all documents submitted electronically through SCS Advanced Services System. The Help Desk may search for document submissions by filling in the textbox of one or more of the following criteria:

- User ID (not required)
- Document ID (not required)
- Document Name (not required)
- Partner (required)
- Dataflow (Program) (not required)
- Start Date (not required)
- End Date (not required)

Once information has been entered into one or more of the search fields, the Help Desk clicks the “Search” button.
Exhibit 3-50 CROMERR Administration – Search

The subsequent screen will be the CROMERR Administration – Search Results shown by Exhibit 3-51, where the results are populated to a table according to the following columns:

- Submission ID
- Dataflow (Program)
- Created
- User ID

The search results can be organized via the arrows next to the title column in ascending or descending alphabetical or numerical order.

The Submission ID (a systematically generated unique identifier for each submission) is presented as a blue hyperlink.
When the desired Submission ID hyperlink is clicked, Help Desk is brought to the ‘CROMERR Administration – Submission’ page seen in Exhibit 3-52. Here, the Applicable Help Desk Roles can view “Submission Details” and the “Document Set”.

The Submission Details panel provides the Applicable Help Desk Roles with the following information about the document submission:

- User ID
- Name
- Submission ID
- Dataflow (Program)
- Created (Date and Time)
- Document ID

The Document Set panel displays the user’s document set(s) submitted to the SCS Advanced Services System. The panel first displays the Signature status in the top right corner with a button to refresh this status. The status will either be displayed as “Valid” or “Invalid”.

Each document set submission will provide the Document Name as a hyperlink to view the document, and the Document ID is also provided. At the bottom of each document there is a blue dropdown link “Retention and Repudiation”.

---

**Exhibit 3-51 CROMERR Administration – Search Results**

![CROMERR Administration – Search Results](image)
Selecting the blue “Retention and Repudiation” dropdown link will open a dropdown option to select a “Status” for the document, and a textbox to enter a Description will also be visible as shown in Exhibit 3-53.
3.5 Alert Publishing

The SCS Alert Publishing tool supports the creation, review, and publishing of content to various areas within SCS Advanced Services. The Alert Publishing tool is found by Applicable Help Desk Roles via the Admin Tools panel on the Dashboard. Exhibit 3-54, displays the location of the Alert Publishing Tool within the Admin Tools panel.
Once the Alert Publishing hyperlink is selected, the Applicable Help Desk Roles will be brought to a page where alerts can be searched and new alerts can be created as shown in Exhibit 3-55.

**Exhibit 3-55 Alert Publishing Landing Page**
3.5.1 Alert Publishing – Create New

The Alert Publishing tool lets messages be communicated to users of SCS Advanced Services, often used to communicate outages, patching, deadlines, training sessions, etc. The different alert types supported are as follows:

- **SCS Homepage** – notices visible to all users via the SCS Advanced Services homepage
- **Recent Announcements** – notices accessible to users via the ‘Recent Announcements’ tab (shown in the yellow box in Exhibit 3-56)
- **Dashboard Notification** – notices visible to users via Dashboard page upon login (shown in the red box in Exhibit 3-56)
- **Dashboard Alerts** – notices visible to users via Dashboard page upon login (shown in the black box in Exhibit 3-56)
- **Email** – email notification sent to a user community.

Note: Email alerts are sent to the applicable recipient’s registered email address. Homepage alerts are displayed on the SCS Advanced Services Homepage pre-log in. After log in, the homepage alerts will be displayed in Dashboard Alerts (Black box).

Exhibit 3-56 Alert Locations

To create an Alert, click the “Continue” button under Create New Alert section (shown in Exhibit 3-55). After clicking “Continue”, the Applicable Help Desk Roles will be brought to the ‘Alert Publishing – Create’ page where the applicable Alert Type (depending on access) is chosen from the dropdown shown in Exhibit 3-57. To view alert samples, click the blue “Here” hyperlink above the message body text box.
Each new alert publishing request requires the Applicable Help Desk Roles to enter information into one or more of the following fields:

- **Partner(s)**
  - Visible for Dashboard News and Updates, Dashboard Alerts, or Email alert types, as shown in Exhibit 3-58.
  - Can select multiple partners by typing in multiple partner values.

- **Program Service(s) (Program-i.e. CMDP)**
  - Visible for Dashboard News and Updates, Dashboard Alerts, or Email alert types, as shown in Exhibit 3-58.
  - Can select multiple programs by typing in multiple program values. Note: The available program for the purpose of this document is CMDP.

- **Role(s)**
  - Visible for Dashboard News and Updates, Dashboard Alerts, or Email alert types as shown in Exhibit 3-58.
Can select multiple roles by typing in multiple role values.

- Program ID
  - Program ID may be entered if the Applicable Help Desk Roles only want accounts linked to that specific Program ID to view the Alert.
  - Visible for the Dashboard News and Updates, Dashboard Alerts, or Email alert types, as shown in Exhibit 3-60.

- Subject
  - Visible for Email alert type only. The text entered in the ‘Subject’ textbox will be the subject of the email that is sent to users as shown in Exhibit 3-59.

- Activity Date
  - Visible only for ‘Recent Announcements Page’ alert types as shown in Exhibit 3-62.
  - Will be required to select an Activity Date via a date picker. The Activity Date will determine when a Recent Announcement will be published (i.e., becomes visible to users).
  - The Activity Date cannot be set to a date in the past.

- Start Showing On
  - The Start Showing On field will not be displayed for ‘Recent Announcement’ or ‘Email’ alert types as shown in Exhibit 3-61.
  - Users will be required to select a Start Showing On value via a date picker. The Start Showing On date will determine when an alert will be published (becomes visible to users).
  - For Applicable Help Desk Roles, the date picker will include immediate publishing.
  - The Start Showing On Date cannot be set to a date in the past.

- End Showing After
  - The End Showing After field will not be displayed for ‘Recent Announcement’ or ‘Email’ alert types.
  - Users will be required to select an End Showing After value via a date picker shown in Exhibit 3-61. The End Showing After date will determine when an alert will no longer be visible to users. The selected date must be in the future, after the Start Showing On date, but no more than 60 days after the Start Showing On date.

- Publish Now
  - A Publish Now checkbox will be displayed to the right of the Start Showing On date field. This field is displayed to Applicable Help Desk Roles, and will determine whether an alert is published immediately or not. The Publish now checkbox can be seen under the “Start showing on” textbox in Exhibit 3-61.
• High Priority
  o A checkbox will be displayed to users which will determine whether an alert is of
    High Priority or not. This function is only available when creating ‘Dashboard Alerts’
    and ‘Dashboard News and Updates’ as shown in Exhibit 3-60.

• Message Body
  o A user will be able to enter the content for the alert via an HTML supporting text
    box. The number of characters will be limited based on the alert type. The
    message body can be viewed in Exhibit 3-58.
    ▪ For ‘Dashboard News and Updates’ alerts, no more than 300 characters
      may be entered.
    ▪ For ‘Dashboard Alerts’, no more than 300 characters may be entered.
    ▪ For ‘Recent Announcements’ alerts, no more than 250 characters may be
      entered.
    ▪ For ‘SCS Homepage’ alerts, no more than 250 characters may be entered.
    ▪ For ‘Email’ alerts, there is no limit on the number of characters.
Exhibit 3-58 Create New Dashboard Alert with Partner, Program Service, and Role Dropdown
Exhibit 3-59 Create New Email Alert
Exhibit 3-60 Dashboard News and Updates with Program ID Textbox and High Priority Checkbox
Exhibit 3-61 Create New Dashboard Homepage Alert and Publish Now Checkbox
3.5.2 Alert Publishing - Search

There are four types of Alert statuses as shown in Exhibit 3-63.

**Exhibit 3-63 Alert Status**

<table>
<thead>
<tr>
<th>Request Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>This is the initial status used once a user initiates a request. It stays in this status until the request is submitted for publishing.</td>
</tr>
<tr>
<td>Pending</td>
<td>This status is used when a user has submitted a request, but the request is awaiting publishing.</td>
</tr>
<tr>
<td></td>
<td>If Applicable Help Desk Roles request to publish an alert, it will remain Pending Publish only if the Start Showing On Date is set to a future date.</td>
</tr>
<tr>
<td>Published</td>
<td>A request is updated to a status of ‘Published’ once a request is actively displayed on SCS Advanced Services.</td>
</tr>
<tr>
<td>Expired</td>
<td>An alert is updated to the status of ‘Expired’ once the End Showing On Date has passed and the alert is no longer actively displayed on SCS Advanced Services.</td>
</tr>
</tbody>
</table>
The Alert Publishing search is found on the Alert Publishing landing page as viewed in Exhibit 3-55. Applicable Help Desk Roles will be able to search based on the following criteria: User ID, Alert Type, Partner, Program Service, Role, Alert Status, Publish Date, and Alert Text. Search results will return all existing alerts.

Once a search is conducted, the matching results will be returned on a subsequent page as shown in Exhibit 3-64. These search results are returned in a table including the following table columns:

- **Plus Symbol** – The first column is un-named but contains plus-marks. Clicking these will expand the search results to provide certain information depending on Alert Type. For Email alerts, Partner(s), Program Service(s)(Program), Role Name(s), and Subject will be displayed. For Recent Announcements, the Activity date will be displayed. For SCS Home Page Alerts, the Start and End Showing dates will be displayed. For Dashboard News and Updates alert types, the Partner(s), Program Service(s)(Program), Role Name(s), and Start and End Showing dates will be displayed if applicable. When the result is expanded via plus-marks, the symbol will then become a minus symbol which will close the additional information.

- **User ID** – the User ID for the individual who created the alert request
- **Alert Type** – displays the type of Alert
- **Status** – displays Alert status. For Status types, refer to Exhibit 3-63.
- **Date Published** – the publish date is defined as the Activity Date value. For alert types that do not collect Activity Date, the publish date is synonymous with the Start Showing On date.
- **Excerpt** – an excerpt of the alert message is displayed here as a hyperlink. Following this hyperlink will allow the alert to be edited.
- **Actions** – if applicable: Delete, Unpublish or Publish Now hyperlinks.
### Exhibit 3-64 Alert Publishing - Search Results

<table>
<thead>
<tr>
<th>User ID</th>
<th>Alert Type</th>
<th>Status</th>
<th>Date Published</th>
<th>Excerpt</th>
</tr>
</thead>
<tbody>
<tr>
<td>BENNEWACCOUNT</td>
<td>Email</td>
<td>Published (expired)</td>
<td>1/22/2016 12:00:00 AM</td>
<td>This is a test for email alerts....</td>
</tr>
<tr>
<td>BENNEWACCOUNT</td>
<td>Recent Announcements Page</td>
<td>Published (expired)</td>
<td>1/22/2016 12:00:00 AM</td>
<td>This is a Recent Announcements test....</td>
</tr>
<tr>
<td>BENNEWACCOUNT</td>
<td>SCS Home Page</td>
<td>Published (expired)</td>
<td>12/29/2015 12:00:00 AM</td>
<td>Alert testing for Homepage....</td>
</tr>
<tr>
<td>BENNEWACCOUNT</td>
<td>MySCS News and Updates</td>
<td>Draft</td>
<td>N/A</td>
<td>Testing...</td>
</tr>
</tbody>
</table>

Start Showing On: 12/29/2015 12:00:00 AM
End Showing After: 1/4/2016 12:00:00 AM

Program Service(s): HD; CMDP DEMO
Role Name(s): State Compliance Officer; State Lab Preparer; State Lab Reviewer; State Lab Submitter; State Lab CMDP Administrator; PWS Preparer; PWS Reviewer; PWS Certifier; PWS CMDP Administrator; Private Lab Preparer; Private Lab Reviewer; Private Lab Certifier; Private Lab CMDP Administrator

Showing 11 to 20 of 32 rows | 10 - records per page
3.5.3 Email Notifications

Email notifications will be sent out at various places throughout the Alert publication process. Exhibit 3-65 outlines these emails.

**Exhibit 3-65 Email Notifications**

<table>
<thead>
<tr>
<th>Triggering Event</th>
<th>Recipient</th>
<th>Email Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>When a publishing request for a future date is submitted by Central Help Desk User.</td>
<td>All Central Help Desk Users</td>
<td>This is for Alert Publishers. The following @@Alert_Zone@@ alert has been scheduled to display on @@Start Showing On date@@@@Alert_Body@@</td>
</tr>
<tr>
<td>When a Central Help Desk User publishes a request immediately.</td>
<td>All Central Help Desk Users</td>
<td>This is for Alert Publishers. The following Alert has been published to @@Alert_Zone@@. @@Alert_Body@@. This alert will be displayed until @@Stop Showing On date@@</td>
</tr>
<tr>
<td>When a request is published via the automated job.</td>
<td>All Central Help Desk Users</td>
<td>This is for Alert Publishers. The following Alert has been published to @@Alert_Zone@@. @@Alert_Body@@.</td>
</tr>
<tr>
<td>When a request is edited by a user other than the initiating user.</td>
<td>The user who initiated the request.</td>
<td>Your @@ALERT_ZONE@@ alert has been edited. @@Alert_Body@@.</td>
</tr>
<tr>
<td>When a request is deleted.</td>
<td>The Applicable Help Desk Roles that created the request, and the individual who deleted the request.</td>
<td>The following alert publishing request has been deleted. @@Alert_Body@@.</td>
</tr>
<tr>
<td>When a request is unpublished.</td>
<td>The Applicable Help Desk Roles who created the request, and the individual who unpublished the request.</td>
<td>The following alert publishing request has been unpublished. @@Alert_Body@@.</td>
</tr>
</tbody>
</table>

3.5.4 Deleting an Alert

Applicable Help Desk Roles have the ability to delete an alert which will remove it from the system completely. Deletions of alerts are only permitted for those alerts that have not yet been published.

For the Help Desk, the Delete link will be visible for all alert types that are in a ‘Draft’ or ‘Pending Publish’ state, regardless of who created it.
The Applicable Help Desk Roles will have the opportunity to confirm the deletion once the Delete link is clicked. Deletion of an alert will also trigger an email to the individual who initiated the request.

3.5.5 Unpublishing an Alert

The Help Desk also has the ability to “unpublish” an alert that has already been published. Doing so, will make an alert no longer visible to end users.

For Help Desk, the Unpublish link will be visible depending on the alert type. All Recent Announcements will not be eligible for unpublishing. The Unpublish link will be displayed for ‘SCS Home Page’, ‘Dashboard Alerts’, and ‘Dashboard News and Updates’ alert types, regardless of who created it. A user will have the opportunity to confirm the unpublishing, once the Unpublish link is clicked. Unpublishing an alert will also trigger an email to the individual who initiated the request.

3.6 Themes

The SCS Advanced Services application supports custom themes as a way to integrate with external applications. Applying themes to the SCS Advanced Services pages will help make hand-offs between systems appear seamless to end-users. Exhibit 3-66 displays the location of the Themes tool in the Admin Tools panel.

Exhibit 3-66 Themes Hyperlink

When the hyperlink is clicked, the Applicable Help Desk Roles will be brought to the ‘Themes’ landing page where the appropriate theme may be set as shown in Exhibit 3-68.

A theme is defined as defining the colors for the following:

1. Background Color
2. Footer Color
3. Tab Color (inactive)
4. Tab Color (hover)
5. Logo or Graphic

Exhibit 3-67 maps the placement of each of these items.
Themes are set at a program level. In order to set the theme for a Program, the Central Help Desk will need to set values for the following:

- **Program**: dropdown will be populated with values for Programs (CMDP) currently using SCS Advanced Services.
- **Theme Name**: the Central Help Desk can add a nickname for the theme being saved
- **Status**: whether they want the theme to be active or not
- **Background Color**: user can click into field which will display a color picker for the background color
- **Footer Color**: user can click into field which will display a color picker for the footer color
- **Tab Color**: user can click into field which will display a color picker for the tab color
- **Tab Color Hover**: user can click into field which will display a color picker for when a cursor is hovered over a tab
• Logo – User can upload an image they would like to display in the upper left hand corner
• Font Color – user can click into field which will display a color picker for the font color
• Footer Font Color – user can click into field which will display a color picker for the font color used in the footer
• Tab Font Color – user can click into field which will display a color picker for the font color used on the tabs
• Hover Tab Font Color – user can click into field which will display a color picker for the font color used when hovering over the tabs.

The user can preview the settings by clicking the ‘Preview’ button, and can choose to save it using the ‘Save’ button. The user may also return to their Dashboard at any time by selecting the ‘Back’ button as shown in Exhibit 3-68.

Exhibit 3-68 Themes Landing Page
Exhibit A-1: Help Desk Role Permissions

Exhibit A-1 Applicable Help Desk Roles displays a breakdown of all the Help Desk tools available, and which role types have access to those tools.

Note:

If a Partner Help Desk has access to a tool, it will still be restricted to users that fall under their Partner(s) only.

If a Partner-Program Help Desk has access to a tool, it will be restricted to users that fall under their Partner-Program(s) only.

### Exhibit A-1 Applicable Help Desk Roles

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Admin Tool</th>
<th>Central Help Desk</th>
<th>Partner Help Desk</th>
<th>Partner Program Help Desk</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>User Management</strong></td>
<td>Has General Access</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Search</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Search Results</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>User Details</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Reset/Unlock/View Password Questions</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>View User’s Inbox</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td><strong>User Account Information:</strong></td>
<td>View Password Expiration Date</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>View Registration Date</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Security Questions- View</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Security Questions — Edit</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----</td>
<td>-----</td>
<td>----</td>
<td></td>
</tr>
<tr>
<td>User ID — Edit</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Name — Edit</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Electronic Score Index</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Paper Score Index</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Lock Account</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Unlock Password</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Reset 20-5-1</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td></td>
</tr>
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</table>

**User Organization Information:**

<table>
<thead>
<tr>
<th>Edit Organization Email</th>
<th>Yes</th>
<th>No</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Org Contact Information (Phone ext.)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Assign Primary Organization</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Change ESA Status</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Program Flow Information:**

<table>
<thead>
<tr>
<th>Activate Role</th>
<th>Yes</th>
<th>Yes</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deactivate Role</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>ApproveESA</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Deny ESA</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Add Program Service</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Add Role</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Pending Requests</td>
<td>Has General Access</td>
<td>Search</td>
<td>Search Results</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------</td>
<td>--------</td>
<td>---------------</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pre-Registration</th>
<th>Has General Access</th>
<th>Search Existing</th>
<th>Expire CRK</th>
<th>ReActivate Expired CRK</th>
<th>View CRK details</th>
<th>Create New CRK</th>
<th>Suppress CRK Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Alert Publishing</th>
<th>Has General Access</th>
<th>Create/Search/Unpublish Email</th>
<th>Create/Search/Unpublish Dashboard</th>
<th>Create/Search/Unpublish Recent Announcements</th>
<th>Create/Search/Unpublish Homepage</th>
<th>Search Alerts</th>
<th>Unpublish Alerts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
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</table>

<table>
<thead>
<tr>
<th>CROMERR</th>
<th>Has General Access</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>Search Submissions</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------</td>
<td>--------------------</td>
<td>-----</td>
<td>-----</td>
<td>----</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Submissions</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update COR Status</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Themes</td>
<td>Has General Access</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create New Theme</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Edit Theme</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LexisNexis</td>
<td>A third party tool used to verify person identity data.</td>
</tr>
<tr>
<td>Paper Score</td>
<td>A numeric value characterizing the level of the user’s identity assurance.</td>
</tr>
<tr>
<td>Electronic Signature Agreement (ESA)</td>
<td>An agreement signed by an individual with respect to an electronic signature device. In the case a signature cannot be provided electronically, the agreement can be printed and mailed.</td>
</tr>
<tr>
<td>Electronic score</td>
<td>A LexisNexis result providing an index measuring the identity assurance of a user.</td>
</tr>
<tr>
<td>Partner Verification Index</td>
<td>An index measuring the identity assurance between the partner and the user.</td>
</tr>
<tr>
<td>Customer Retrieval Key (CRK)</td>
<td>A unique value communicated to a user for the purposes of allowing access to specific functions. CRKs are used during the pre-registration process.</td>
</tr>
<tr>
<td>Program</td>
<td>The workflow established for particular data.</td>
</tr>
<tr>
<td>Role</td>
<td>The functions/access supported by a user.</td>
</tr>
<tr>
<td>Partner</td>
<td>The entity responsible for the management of a Program.</td>
</tr>
<tr>
<td>Central Help Desk</td>
<td>Manage users across all partners and all programs.</td>
</tr>
<tr>
<td>Partner Help Desk</td>
<td>Manage users for a designated partner. This encompasses all programs the partner may have.</td>
</tr>
<tr>
<td>Partner-Program</td>
<td>Manage users for a designated Program within a Partner. A CT-CMDP Partner-Program Help Desk may only manage users for CMDP within the Connecticut Partner.</td>
</tr>
<tr>
<td>eSIG-PIN</td>
<td>Also known as the CROMERR 20-5-1 questions, these are a set of 5 identity verification questions used to confirm a user’s identity when signing documents. The user must remember their answers to these questions. If forgotten, the eSIG-PIN must be reset.</td>
</tr>
<tr>
<td>CROMERR widget</td>
<td>This is a 2 factor authentication tool used during the electronic signature process. The user must enter their password (factor 1) and will be asked one of their 5 CROMERR 20-5-1 questions at random (factor 2). The user must then click the “Sign” button.</td>
</tr>
<tr>
<td><strong>Organization</strong></td>
<td>Entity responsible for producing work for a particular workflow</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Dashboard</strong></td>
<td>Formally known as MySCS, this is the user’s home screen once logged in to the Advanced SCS Services System.</td>
</tr>
<tr>
<td><strong>CROMERR</strong></td>
<td>Cross Media Electronic Reporting Rule</td>
</tr>
</tbody>
</table>