



Provider Guide to Account Administration

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Introduction

Managing your organization's account is important to ensure that:

- Users have access to the system.
- All of your organization's information is accurate and up to date.
- Your organization's profile accurately presents your organization to City Agencies, Foundations and potential partners.

This guide is for Account Administrators, it gives instructions on how to add and maintain users and keep your organization's account up to date.

The first step for all users to gain access to the HHS Accelerator System is to establish a NYC.ID. See "HHS Accelerator: Account Creation and Access" for information on how a user can establish a NYC.ID and apply for a user account in the system.

Managing Members and Users of your Organization

Assigning Roles to System Users

Your organization needs to make some critical decisions regarding who will access the HHS Accelerator System and what role each user will play. Please consider the most appropriate individual(s) to:

- Manage your organization's relationships with the City and other funders
- Maintain your organization's profile
- Respond to Requests for Proposals from the City and/or other potential funders
- Sign contracts on behalf of your organization
- Submit budgets and invoices on behalf of your organization.

HHS Accelerator System access is divided into three categories: Financials, Procurements and Financials, and Procurements. Within the category you assign to a user, you must also assign a level. There are two levels, "Level 1" (L1) and "Level 2" (L2). Level 1 users have restricted, basic permissions in their assigned category and Level 2 users unrestricted permissions in their assigned category.

- **Financials Access**
 - **Level One**
 - Basic Permissions in the Financials, Documents Vault and Applications tabs.
 - **Level Two**
 - Basic Permission
 - Application Submission, Budget Submission/e-signature, Invoice Submission/e-signature and Document Sharing Permissions.

- **Procurements Access**
 - **Level One**
 - Basic Permissions in the Procurements, Document Vault and Applications tabs.
 - **Level Two**
 - Basic Permissions
 - Application Submission, Proposal Submission/e-signature and Document Sharing Permissions.

- **Financials and Procurements Access**
 - **Level One**
 - Basic Permission in the Financials, Procurements, Document Vault and Applications tabs.
 - **Level Two**
 - Basic Permissions
 - Application, Proposal Submission/e-signature and Budget Submission/e-signature, Invoice Submission/e-signature and Document Sharing Permissions.

System User Access Table

System roles and common organizational levels for these roles are outlined in the table below.

Role	Tasks	L1 User	L2 User
Procurement	Begin Business Application	X	X
	Submit Business Application		X
	Select Services	X	X
	Submit Service Applications		X
	Begin Proposal	X	X
	Submit Proposal		X
	View Evaluation Scores		X
	Retract Proposal		X
	Cancel Proposal		X
	Show Proposal Comments	X	X
	Upload Documents	X	X
	Share Documents		X

Role	Tasks	L1 User	L2 User
Financial	Begin Business Application	X	X
	Submit Business Application		X
	Select Services	X	X
	Submit Service Applications		X
	View Budget	X	X
	Modify Budget	X	X
	Request Advance		X
	Cancel Modification		X
	Submit Invoice		X
	Delete/Withdraw Invoice		X
	View Invoice	X	X
	Upload Documents	X	X
	Share Documents		X

Account Administrator Role

The individual who submits the initial request for your organization’s HHS Accelerator Account is typically your Account Administrator. S/he is automatically granted access to all system privileges and becomes a L2 user. Account Administrators have the ability to grant other users access to the system. For this reason, we strongly recommend selecting at least **two** Account Administrators to share the responsibility of managing your organization’s user access and privileges.

The Business and Service Applications are explained in further detail in the “Submitting the HHS Accelerator Application” guide. Additionally, the Membership Management process is described in the “HHS Accelerator Account Administration” guide.

Handling Requests to Join your Organization

User access to the system begins with members of your organization taking action outside of the system. Members of your organization must create their own NYC.ID and request access to your organization’s account (steps covered in the *Account Creation and Access*. Once a member of your organization has registered in the system and requested membership, you are responsible for reviewing and as appropriate, approving the request:

The screenshot shows the NYC HHS Accelerator web application. The top navigation bar includes 'Organization Information', 'Document Vault', 'Applications', 'Procurements', and 'Financials'. The 'Organization Information' section is active, with sub-tabs for 'Basics', 'Geography', 'Languages', 'Population', and 'Members & Users'. The 'Members & Users' tab is selected, displaying a table of organization members. A green '+ Add Member' button is visible. The table has columns for Name, Office Title, Email Address, System User, Member Status, and Actions. The last row shows a member with a 'Pending' status and a 'Review Request' link highlighted.

Name	Office Title	Email Address	System User	Member Status	Actions
Jack Sparrow	Executive	jsorel@hhs.nyc.gov	Yes	Active	Edit Profile
James Polk	Board Chair / President	acceleratororg12@mailinator.com	No	Active	Edit Profile
James Polk	Executive Director / Chief Executive Officer (orequivalent)	acceleratororg12@mailinator.com	No	Active	Edit Profile
James Polk	Manager	acceleratororg12@mailinator.com	Yes	Active	Edit Profile
John Candy		thebestorg_123@mailinator.com	Pending	Pending	Review Request

1. Click the “**Organization Information**” button.
2. Click the “**Members & Users**” tab.
3. Click the “**Review Request**” link.

Organization Information

Basics | Geography | Languages | Population | **Members & Users**

New User Request: John Candy ?

A new user has requested access to the HHS-Accelerator system.

- To approve this request, please fill out the member information or link to an existing organization member profile and click the "Approve" button.
- To deny this request, please scroll to the bottom of the page and click the "Deny" button.

* Indicates required fields

NYC.ID User Information

First Name: John
 Middle Initial:
 Last Name: Candy
 NYC.ID/Email Address: thebestorg_123@mailinator.com

HHS Accelerator System Permissions

4 * Choose one type of account to assign to this user:

- Financials**
 - Level One (Basic Permissions in the Financials, Document Vault and Applications tab)
 - Level Two (Basic Permissions PLUS Application, Budget Submission/e-signature, Invoice Submission and Document Sharing Permissions)
- Procurements**
 - Level One (Basic Permissions in the Procurements, Document Vault and Applications tab)
 - Level Two (Basic Permissions PLUS Application, Proposal Submission/e-signature and Document Sharing Permissions)
- Financials and Procurements**
 - Level One (Basic Permissions in the Financials, Procurements, Document Vault and Applications tab)
 - Level Two (Basic Permissions PLUS Application, Proposal and Budget Submission/e-signature, Invoice Submission and Document Sharing Permissions)

5 * Would you like to assign this user the same permissions you have as an Account Administrator?:

- Yes, this user can also approve account requests and assign user roles.
- No

6 **Check for Existing Profile**

Deny **Approve**

Verify that this person is an individual you want to add as a user.

4. Assign the user a type of account and level.
5. Will the user be an Account Administrator? Click "Yes" or "No" as appropriate.
6. Click the "Check for Existing Profile" button.

Link to Existing Organization Member Profile ✕

Below is a list of your organization's members that have profile information in HHS Accelerator, but do not have user accounts. Select from the list who the new user should be linked to and click the "Link" button

Name	Office Title	Email Address
<input type="radio"/> James Polk	Board Chair / President	acceleratororg12@mailinator.com
<input type="radio"/> James Polk	Executive Director / Chief Executive Officer (orequivalent)	acceleratororg12@mailinator.com

7

Profile not found **Link to Existing Profile**

7. If the correct profile appears, click "Link to Existing Profile." If not, click "Profile not found."

Organization Information

Basics | Geography | Languages | Population | **Members & Users**

New User Request: John Candy ?

A new user has requested access to the HHS-Accelerator system.

- To approve this request, please fill out the member information or link to an existing organization member profile and click the "Approve" button.
- To deny this request, please scroll to the bottom of the page and click the "Deny" button.

* Indicates required fields

NYC.ID User Information

First Name	John
Middle Initial	
Last Name	Candy
NYC.ID/Email Address	thebestorg_123@mailinator.com

HHS Accelerator System Permissions

* Choose one type of account to assign to this user:

Financials

Level One
(Basic Permissions in the Financials, Document Vault and Applications tab)

Level Two
(Basic Permissions PLUS Application, Budget Submission/e-signature, Invoice Submission and Document Sharing Permissions)

Procurements

Level One
(Basic Permissions in the Procurements, Document Vault and Applications tab)

Level Two
(Basic Permissions PLUS Application, Proposal Submission/e-signature and Document Sharing Permissions)

Financials and Procurements

Level One
(Basic Permissions in the Financials, Procurements, Document Vault and Applications tab)

Level Two
(Basic Permissions PLUS Application, Proposal and Budget Submission/e-signature, Invoice Submission and Document Sharing Permissions)

* Would you like to assign this user the same permissions you have as an Account Administrator?:

Yes, this user can also approve account requests and assign user roles.

No

[Check for Existing Profile](#)

Member Information

8 * Office Title: **9**

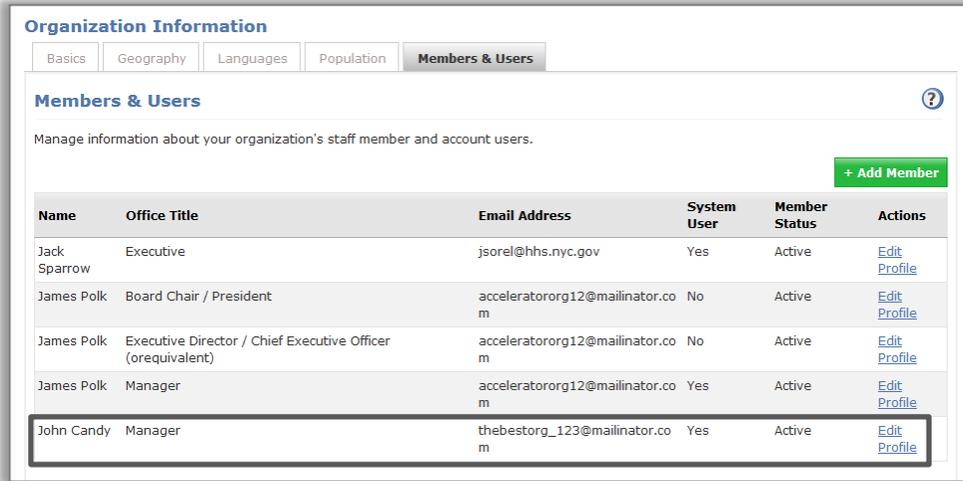
Office Phone Number:

[Deny](#) [Approve](#)

8. Choose an “Office Title.”

9. Click “Approve.”

The user will now appear as a System User.



Name	Office Title	Email Address	System User	Member Status	Actions
Jack Sparrow	Executive	jsorel@hhs.nyc.gov	Yes	Active	Edit Profile
James Polk	Board Chair / President	acceleratororg12@mailinator.com	No	Active	Edit Profile
James Polk	Executive Director / Chief Executive Officer (orequivalent)	acceleratororg12@mailinator.com	No	Active	Edit Profile
James Polk	Manager	acceleratororg12@mailinator.com	Yes	Active	Edit Profile
John Candy	Manager	thebestorg_123@mailinator.com	Yes	Active	Edit Profile

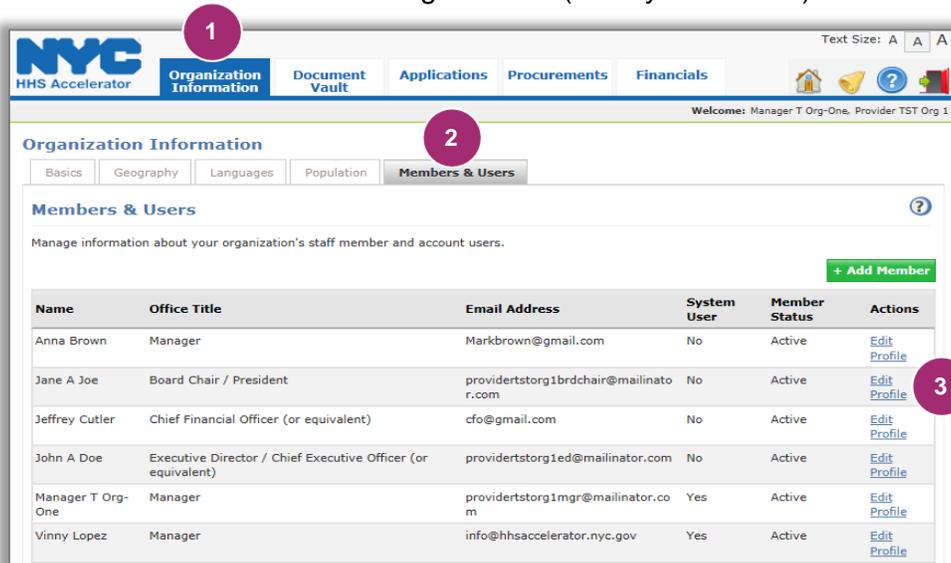
Circumstances may also arise that require you to take system access away. Anyone whose information has been added to the system during account set up or in response to the HHS Accelerator Applications is considered a member of your organization. You may need to remove members that have left your organization or those who no longer require system access. There are two ways to remove users. You can:

- Remove members; or
- Deactivate users.

We recommend that you remove members that leave your organization.

Removing Members from your Organization

To remove members from the organization (non-system users):



Name	Office Title	Email Address	System User	Member Status	Actions
Anna Brown	Manager	Markbrown@gmail.com	No	Active	Edit Profile
Jane A Joe	Board Chair / President	providertstorg1brdchair@mailinator.com	No	Active	Edit Profile
Jeffrey Cutler	Chief Financial Officer (or equivalent)	cfo@gmail.com	No	Active	Edit Profile
John A Doe	Executive Director / Chief Executive Officer (or equivalent)	providertstorg1ed@mailinator.com	No	Active	Edit Profile
Manager T Org-One	Manager	providertstorg1mgr@mailinator.com	Yes	Active	Edit Profile
Vinny Lopez	Manager	info@hhsaccelerator.nyc.gov	Yes	Active	Edit Profile

1. Click the “**Organization Information**” button.
2. Click the “**Members & Users**” tab.
3. Click the “**Edit Profile**” link.

Organization Information

Basics | Geography | Languages | Population | **Members & Users**

Edit Member Profile: Anna Brown ?

Edit member information and system permissions.

* Indicates required fields

Member Information

* **First Name:** Anna

Middle Initial:

* **Last Name:** Brown

* **Office Title:** Manager

Office Phone Number:

* **Email Address:** Markbrown@gmail.com

Remove from Organization?

Indicate if this person needs to be removed from the organization:
You may consider removing a member if they are no longer associated with your organization. If you only want to remove access to the system, please check the Deactivate User box above.

Remove this member 4

* **Last Day with Organization: (mm/dd/yyyy):** 09/26/201x 5

Cancel Save

4. Click the checkbox to remove the member and input last day with the organization.
5. Click **“Save.”**

The member will now appear as “Inactive.”

Organization Information

Basics | Geography | Languages | Population | **Members & Users**

Members & Users ?

Manage information about your organization's staff member and account users.

[+ Add Member](#)

Name	Office Title	Email Address	System User	Member Status	Actions
Anna Brown	Manager	Markbrown@gmail.com	No	Inactive	Edit Profile
Jane A Joe	Board Chair / President	providertstorg1brdchair@mailinator.com	No	Active	Edit Profile
Jeffrey Cutler	Chief Financial Officer (or equivalent)	cfo@gmail.com	No	Active	Edit Profile
John A Doe	Executive Director / Chief Executive Officer (or equivalent)	providertstorg1ed@mailinator.com	No	Active	Edit Profile
Manager T Org-One	Manager	providertstorg1mgr@mailinator.com	Yes	Active	Edit Profile
Vinny Lopez	Manager	info@hhsaccelerator.nyc.gov	Yes	Active	Edit Profile

There is no way to delete a member and user so that they will no longer appear on the tab

Deactivating Users from your Organization

To deactivate active system users from the organization:

1

2

3

NYC HHS Accelerator

Organization Information Document Vault Applications Procurements Financials

Welcome: Manager T Org-One, Provider TST Org 1

Organization Information

Basics Geography Languages Population **Members & Users**

Members & Users

Manage information about your organization's staff member and account users.

+ Add Member

Name	Office Title	Email Address	System User	Member Status	Actions
Anna Brown	Manager	Markbrown@gmail.com	No	Inactive	Edit Profile
Jane A Joe	Board Chair / President	providertstorg1brdchair@mailinator.com	No	Active	Edit Profile
Jeffrey Cutler	Chief Financial Officer (or equivalent)	cfo@gmail.com	No	Active	Edit Profile
John A Doe	Executive Director / Chief Executive Officer (or equivalent)	providertstorg1ed@mailinator.com	No	Active	Edit Profile
Manager T Org-One	Manager	providertstorg1mgr@mailinator.com	Yes	Active	Edit Profile
Vinny Lopez	Manager	info@hhsaccelerator.nyc.gov	Yes	Active	Edit Profile

1. Click the **“Organization Information”** button.
2. Click the **“Members & Users”** tab.
3. Click the **“Edit Profile”** link.

Organization Information

Basics | Geography | Languages | Population | **Members & Users**

Edit Member Profile: Vinny Lopez ?

Edit member information and system permissions.

* Indicates required fields

NYC.ID User Information

First Name: Vinny
 Middle Initial:
 Last Name: Lopez
 NYC.ID/Email Address: info@hhsaccelerator.nyc.gov

HHS Accelerator System Permissions

* What type of account would you like to assign to this user?:
 Level One (Basic Permission)
 Level Two (Basic PLUS Application Submission/e-signature and Document sharing Permission)

* Would you like to assign this user the same permissions you have as an Account Administrator?:
 Yes, this user can also approve account requests and assign user roles.
 No

Deactivate System User?

Indicate if this user should no longer have access to the system:
 Deactivate User 4

Member Information

* Office Title: Manager
 Office Phone Number:

Remove from Organization?

Indicate if this person needs to be removed from the organization:
 You may consider removing a member if they are no longer associated with your organization. If you only want to remove access to the system, please check the Deactivate User box above.
 Remove this member

5

Cancel Save

4. Click the checkbox to deactivate the user.
5. Click **“Save.”**

The **“System User”** column will change to **“No”** and the user will no longer have access to the system.

Organization Information

Basics | Geography | Languages | Population | **Members & Users**

Members & Users ?

Manage information about your organization's staff member and account users.

[+ Add Member](#)

Name	Office Title	Email Address	System User	Member Status	Actions
Anna Brown	Manager	Markbrown@gmail.com	No	Inactive	Edit Profile
Jane A Joe	Board Chair / President	providertstorg1brdchair@mailinator.com	No	Active	Edit Profile
Jeffrey Cutler	Chief Financial Officer (or equivalent)	cfo@gmail.com	No	Active	Edit Profile
John A Doe	Executive Director / Chief Executive Officer (or equivalent)	providertstorg1ed@mailinator.com	No	Active	Edit Profile
Manager T Org-One	Manager	providertstorg1mgr@mailinator.com	Yes	Active	Edit Profile
Vinny Lopez	Manager	info@hhsaccelerator.nyc.gov	No	Active	Edit Profile

Managing Your Organization's Profile

Managing your organization's profile is a part of maintaining your relationship with the City. Your organization's profile is a part of your public identity visible to users with whom you share documents, so your profile should accurately reflect your organizational goals and capabilities.

An organization's profile information is maintained in the Organization Information section of the system. You can update information in any of the tabs (Basics, Geography, Languages, etc.) and save the changes by clicking "**Save**" at the bottom of the page.

Text Size: A A A

NYC
HHS Accelerator

Organization Information | Document Vault | Applications | Procurements | Financials

Welcome: Manager T Org-One, Provider TST Org 1

Organization Information

Basics | Geography | Languages | Population | Members & Users

Basics

Please fill out the form below as accurately as possible. This information will determine what documents you are required to upload.

* Indicates required fields

General Information

* Employer Identification Number/Tax Identification Number (EIN/TIN): 11-111121

* Organization Legal Name: Provider TST Org 1 **Update Legal Name**

* Corporate Structure: Non Profit

Dun and Bradstreet Number (DUNS#):

* Accounting Period: Jul * To Jun **Update Accounting Period**

Updating Your Organization’s Legal Name

To update your organization’s legal name:

The screenshot shows the NYC HHS Accelerator interface. The top navigation bar includes tabs for Organization Information, Document Vault, Applications, Procurements, and Financials. The 'Organization Information' tab is selected and highlighted with a red circle containing the number '1'. Below the navigation bar, the 'Organization Information' section is visible, with a sub-tab for 'Basics'. The 'Basics' section contains a form for updating organization details. The 'General Information' section includes fields for 'Employer Identification Number/Tax Identification Number (EIN/TIN)' (11-1111121), 'Organization Legal Name' (Provider TST Org 1), and 'Corporate Structure' (Non Profit). A green 'Update Legal Name' button is highlighted with a red circle containing the number '2'.

1. Click the **“Organization Information”** button.
2. Click the **“Update Legal Name”** button.

The screenshot shows the 'Update Organization Legal Name' dialog box. The dialog box has a blue header with the title 'Update Organization Legal Name' and a close button. Below the header, there is a notice: 'Notice: Please complete the fields below to request a name change.' followed by '* Indicates required fields'. The dialog box contains three main sections: 'Current Organization Legal Name:' with the value 'Provider TST Org 1' (highlighted with a red circle containing the number '3'), '* Proposed Organization Legal Name:' with an empty text input field (highlighted with a red circle containing the number '4'), and '* Reasons for updating your Organization Legal Name:' with a text area (highlighted with a red circle containing the number '5'). At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Submit Request' (highlighted with a red circle containing the number '5').

3. Enter the new Legal Name of your organization as it appears on your Certificate of Incorporation (or equivalent).
4. Enter your reasons for updating your Organization Legal Name.
5. Click the **“Submit Request”** button.

An HHS Accelerator staff member will then review this information, and manually approve. The update will not be reflected in the system until it is approved.

Updating Your Accounting Period

Before you can update your organization’s accounting period, please be sure that your filings are current, complete and loaded into the Document Vault prior to your request. If you do not have the proper forms filed, you will not be able to request an update. To request an update to your accounting period:

1. Click the **“Organization Information”** button.
2. Click the **“Update Accounting Period”** button.

3. Enter the new accounting period.
4. Enter Calendar year the new period becomes effective.
5. Click the **“Update”** button.

Managing Multiple Accounts by a Single User

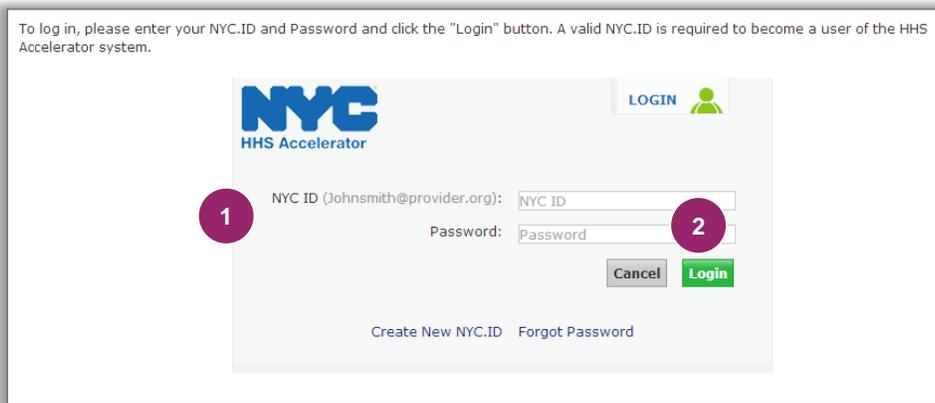
Requesting Access to Multiple Accounts

Users who manage accounts for multiple organizations are able to access each organization's account through a single NYC.ID. To request access to additional organization's accounts please email the Helpdesk at info@hhsaccelerator.nyc.gov and include your name, NYC.ID, current organization and organization you wish to request access to.

Navigating between Multiple Accounts

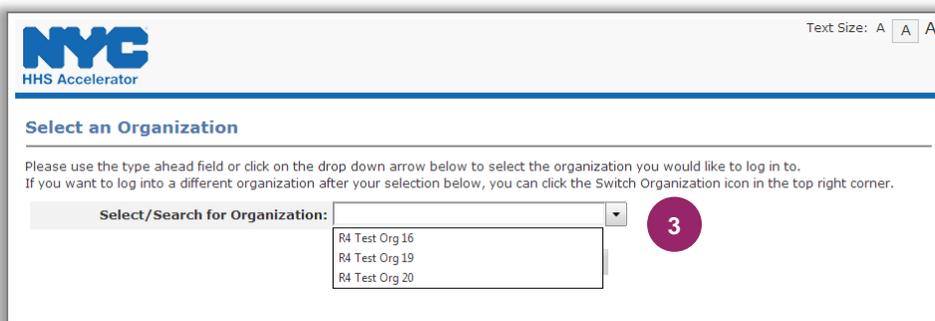
Users who are granted access to multiple accounts have the option to select which organization they would like to access after entering their login credentials.

To log in, please enter your NYC.ID and Password and click the "Login" button. A valid NYC.ID is required to become a user of the HHS Accelerator system.



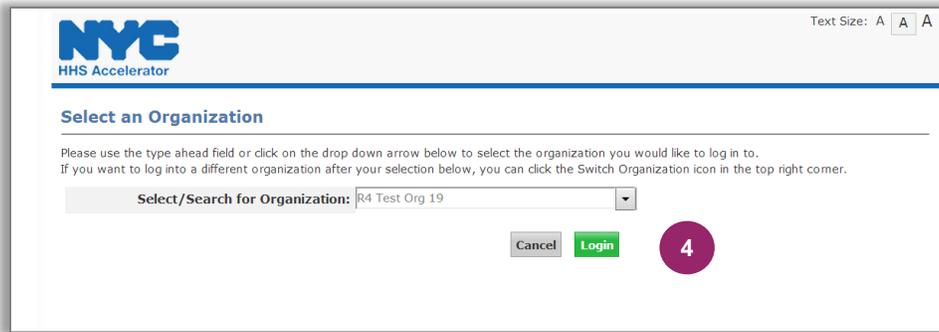
1. Enter your **"NYC.ID"** and **"Password."**
2. Click **"Login."**

Your NYC.ID is the email address used in the initial account set up.



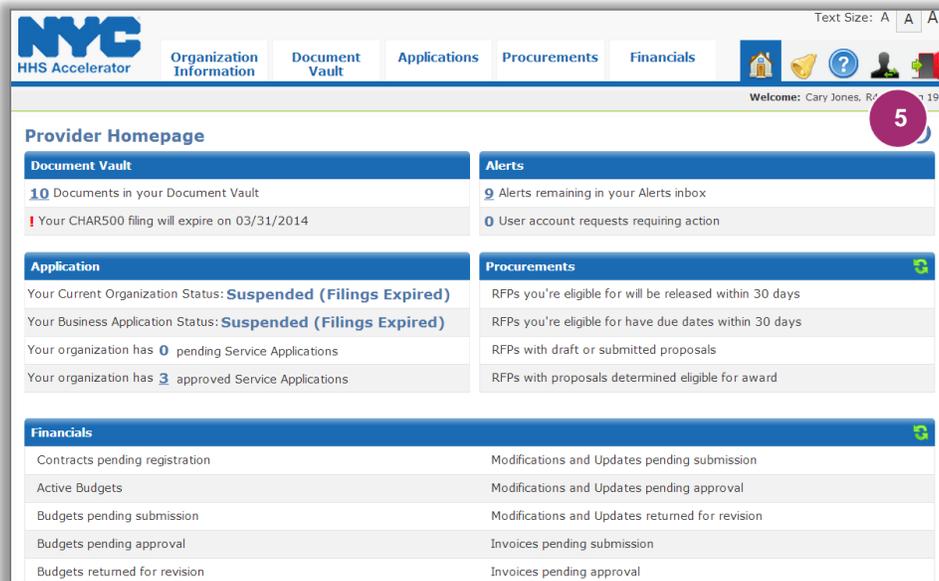
3. Select an organization from the **"Select/Search for Organization"** drop-down menu or start typing the name of the organization in the box.

If an organization does not appear in the drop down menu or when typed please contact info@hhsaccelerator.nyc.gov to request access.

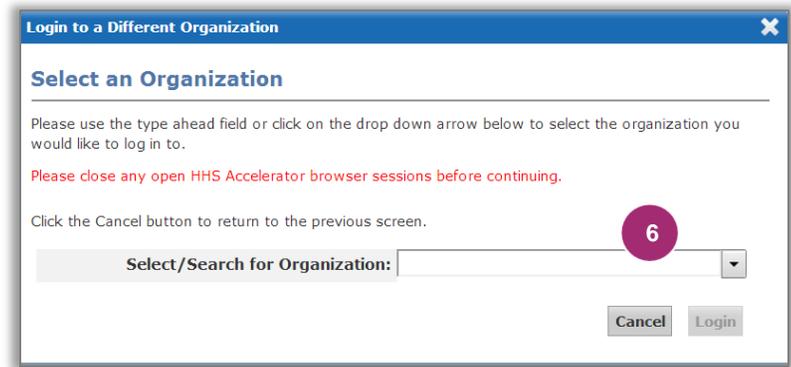


4. Click **“Login.”**

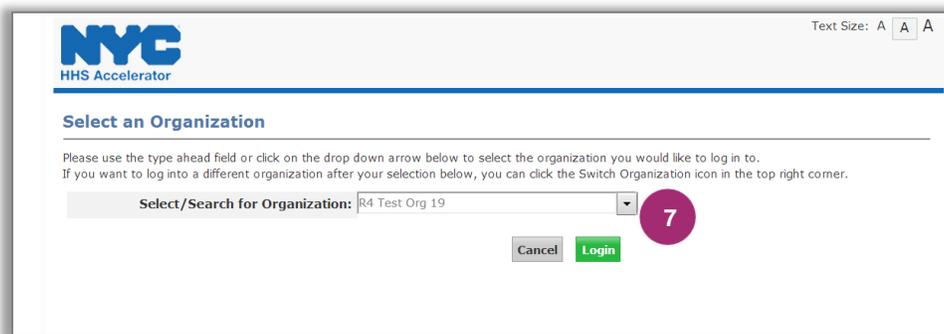
Once logged into the system, users can switch between organizations without completing logging out.



5. To switch accounts click the **“Switch User”** icon.



- To switch users select an organization from the **“Select/Search for Organization”** drop down menu or start typing the name of the organization in the box.



- Click **“Login.”**