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 System 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 four roles: Read-only access, Financials access, Procurements access, and Procurements/Financials access. Within the role 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 role and Level 2 users have unrestricted permissions in their assigned role. The Read-only role does not have access to perform tasks in the system.

• **Read-only Access**
  - Read-only permissions to the entire system.

• **Financials Access**
  - **Level One**
    - Read-only Permissions to the Procurement tab
    - Basic Permissions in the Financials, Documents Vault and Applications tabs.
  - **Level Two**
    - Read-only Permissions to the Procurement tab
    - Full Permissions in the Financials, Documents Vault and Applications tabs.
• **Procurements Access**
  o **Level One**
    ▪ Read-only Permissions to the Financials tab
    ▪ Basic Permissions in the Procurements, Document Vault and Applications tabs.
  o **Level Two**
    ▪ Read-only Permissions to the Financials tab
    ▪ Full Permissions in the Procurements, Document Vault and Applications tabs.

• **Financials and Procurements Access**
  o **Level One**
    ▪ Basic Permissions in the Financials, Procurements, Document Vault and Applications tabs.
  o **Level Two**
    ▪ Full Permissions to the entire System.

**System User Access Table**
System roles and common organizational levels for these roles are outlined in the table below.

<table>
<thead>
<tr>
<th>Role</th>
<th>Tasks</th>
<th>L1 User</th>
<th>L2 User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read-only</td>
<td>None</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td><strong>Procurements</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Begin Business Application</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Submit Business Application</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select Services</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Submit Service Applications</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Begin Proposal</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Submit Proposal</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>View Evaluation Scores</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Retract Proposal</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cancel Proposal</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Show Proposal Comments</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Upload Documents</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Share Documents</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Financials</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Begin Business Application</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Submit Business Application</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Select Services</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Submit Service Applications</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

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<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>View Budget</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify Budget</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Request Advance</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Cancel Modification</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Submit Invoice</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Delete/Withdraw Invoice</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>View Invoice</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Upload Documents</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Share Documents</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

* There is also the Level 1 Procurement/Financial Users role and the Level 2 Procurement/Financial Users role.

**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.*

Your Account Administrators are easily identifiable with an * (asterisk) to the left of their Name in the Members & Users table of the Organization Information module.
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:

1. Click the “Organization Information” button.

2. Click the “Members & Users” tab.

3. Click the “Review Request” link.
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.
7. If the correct profile appears, click “Link to Existing Profile.” If not, click “Profile not found.”

8. Choose an “Office Title.”

9. Click “Approve.”
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 system users.

We recommend that you remove and deactivate members and users that leave your organization.

The pending user will now appear as a System User (“Yes”) and may access your organization’s account.
Removing Members from your Organization

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

1. Click the “Organization Information” tab.
2. Click the “Members & Users” tab.
3. Click “Edit Profile.”
4. Click the check box to remove the member and input last day with the organization.
   
   If you only want to remove access to the system, please check the Deactivate User box above.
5. Enter the individual’s Last day with Organization.
6. Click “Save.”
The member will now appear as Inactive.

Please note that you cannot permanently delete a member and System user from this Members& Users table. You can only change the status to “Inactive.”
Deactivating System Users from your Organization

To deactivate active system users from the organization:

1. Click the “Organization Information” button.
2. Click the “Members & Users” tab.
3. Click the “Edit Profile” link.
4. Click the check box to deactivate the user.

5. Click “Save.”
The “System User” column will change to “No” and the member will no longer have access to the system.

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.
Updating Your Organization’s Legal Name

To update your organization’s legal name:

1. Click the “Organization Information” button.

2. Click the “Update Legal Name” button.

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 help@mocs.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.

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 help@mocs.nyc.gov to request access.
Once logged into the system, users can switch between organizations without completing logging out.

4. Click “Login.”

5. To switch accounts click the “Switch User” icon.
Managing Contract Access

Any user with a Financials role (L1 or L2) who has Account Administrator privileges is able to restrict system users from accessing specific contracts in the Financials module. Restriction to a contract can be reversed only by someone in a Financials role with Account Administrator privileges.

Restricting System User Access to a Contract

1. Click the “Financials” module to get to the Contract List screen.
2. Find the contract you intend to restrict a user from accessing.

3. Click the “Action” drop-down corresponding to that contract.

4. Select “User Access.”

5. Click to select the Financials user you plan to restrict from accessing this contract.

6. Click the single arrow icon to move the user to the “User without Access” box.

The double arrow icon moves all Financials users over to the “User without Access” selection box.

7. Click “Save” to confirm restriction for the selected user(s).
A green confirmation message will display confirming the change to User Access displays on the Contract List.

A user restricted from a contract will have limited access to documents in the Document Vault. The user will not be able to open a file if it is linked to the restricted contract and categorized as one of the Document Types below. However, if the document is linked both to the restricted contract and to a contract for which the user has full access, the user will be able to open the file from the Document Vault.

- **Document Types that can be restricted from users:**
  - Administrative Overhead Documentation
  - Banking Documentation
  - Consultant Agreement
  - Cost Allocation Plan
  - Debt Service Documentation
  - Direct Deposit/Electronic Funds Transfer (EFT) Vendor Payment Enrollment Form
  - Financial Disclosure Forms
  - Fringe Benefits Justification
  - Indirect Rate Justification
  - Paystubs
  - Program Income Documentation
  - Real Estate Tax Documentation
  - Recoupment Justification Documentation
  - Subcontractor Agreement
1. Click the “Financials” tab to get to the Contract List screen.

2. Find the contract for which you intend to edit user access.

3. Click the “Action” dropdown corresponding to that contract.

4. Select “User Access.”
5. Click to select the restricted Financials user to whom you are returning access from the “User without Access” box.

6. Click the single arrow icon to move the user back to the “User with Access” box. The double arrow icon moves all Financials users over.

7. Click “Save” to confirm the access change for the selected user(s).

A green confirmation message will display confirming the change to User Access displays on the Contract List.