# State Shelter Subsidy Grant (SSSG) Program

## PMA Responsibilities & Instructions

### Allowable Number of PMAs

For the SSSG program, only one HE+ system user per agency is allowed to have local HE+ System Profile Management Administrator (PMA) permissions. The PMA user should be someone in a management position or has the authority to make decisions on behalf of the agency.

All SSSG PMA system users will be monitored on a quarterly basis during the program year and as part of the SSSG monitoring process.

### PMA Responsibilities

The local HE+ System Profile Management Administrator (PMA) is responsible for:

A. The creation of new HE+ system contacts, permissions, user profiles, and position information (including the review of user profile names for appropriateness upon creation) within the agency.
B. The maintenance of current HE+ system user profiles including:
   i. Inactivating user profiles who will be off the system for more than two weeks on vacation, maternity leave, summer leave, or any other reason.
   ii. Immediately inactivating contacts and user profiles who have been terminated, retired, quit, or otherwise have left the program.

Any staff with a user profile has the responsibility to maintain their user login name and password as confidential. A user's login name and password shall never be shared, even with other agency staff. The user logged in is responsible for all activity occurring under this user profile. All activity in the HE+ system is recorded and time stamped according to the user login.

### PMA Permissions Requests

The agency must appoint a PMA by submitting a written request to the Division's Grant Specialist responsible for the SSSG program. Any changes to this appointment require written notification to the Division. The creation or changes to a PMA in the HE+ system must be completed by the Division.

### Instructions

Below are brief 'how to' steps commonly performed by PMAs in the HE+ system.

#### *Assign a Position*

1. Click on the 'Organization' tab.
2. Click on the 'Business Name'.
3. Click on the 'Manage Positions' in the action ribbon.
4. Find the person to whom the position is going to be added to.

5. Click in the space to the right of their name in the ‘Position’ column.
6. Click to activate the drop-down and select the position to add.
7. Click ‘Save’ to continue adding positions to this contact OR click ‘Save & Close’.

### *Create a Contact*

1. Click on the ‘Contacts’ tab.
2. Click ‘Add Contact’ located in the action ribbon.
    a. If the business has multiple locations, ensure that the correct location is selected.
    b. Complete all required fields.
    c. An email address is required if also creating a user profile.
3. Click ‘Save’ located in the action ribbon.

### *Create a User Profile*

1. Click on the ‘Contacts’ tab.
2. Click on a specific contract’s name.
3. Click on ‘Create User Profile’ in the action ribbon to select the appropriate permissions.
4. Click ‘Create Profile’ in the action ribbon.
5. An email is sent by the HE+ system to the contact with further instructions to complete the activation of their profile.

### *Delete a Position*

1. Follow steps 1 to 5 under the ‘Assign a Position’ description.
2. Click on the ‘x” to delete the position.
3. Click ‘Save & Close’.

### *Inactivate a Contact*

1. Click on the ‘Contacts’ tab.
2. Click on associated contact.
3. Click on ‘Edit’ located in the action ribbon.
4. Select ‘Inactive’ from the status drop-down list (**DO NOT SELECT DACT**).
5. Click on ‘Save’ located in the action ribbon.

### *Review, Add, or Delete Outreach Sites*

1. Click on the ‘Organization’ tab.
2. Click on the ‘Business Name’.
3. In the ‘General’ section/tab, review the ‘Outreach Sites’ section.
4. To add an outreach site, click ‘Add Outreach Site’ located in the action ribbon.
5. Enter the outreach site name and enter ‘Yes’ for ‘Is Active’. Select either ‘Save & Close’ to finish adding or ‘Save & New’ to add another site.
6. To delete an outreach site, click on the outreach site and select ‘Delete’ provided in the pop-up window.

### *Review Business Information*

1. Click on the ‘Organization’ tab.

2. Click on the 'Business Name'.
3. In the 'General' section/tab, review the business location(s) listed under 'Locations', along with the address and phone number listed.

*Review Business Locations' Mailing & Return Addresses*

1. From the 'Business' page, click on the address listed for a specific 'Business Location'.
2. 'Return Address' is the address listed on customer notification letters.

*Unlock/Activate a User*

1. Click on the 'Contacts' tab.
2. Click on a specific contact's name.
3. Click on the worker's user profile login name.
4. From the action ribbon, select 'Activate' or 'Unlock User'.

*View Agency Contacts & Positions*

1. Click on the 'Organization' tab.
2. Click on the 'Business Name'.
3. Click on the 'Manage Positions' in the action ribbon.
4. Review assigned positions.

**Note**: A 'Position' in the HE+ system is not associated with the HE+ system permissions. Assigning a supervisor position to a contact does not provide 'Supervisor' permission. A user must be assigned 'Supervisor' permissions. A user must also be given 'PMA' permission to be the agency's PMA.