Bright from the Start:

Georgia Department of Early Care and Learning

<u>Provider PANDA User Management</u>

Revised 5/16/2014

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Managing PANDA User Accounts

PANDA Provider User Roles

Each PANDA user is assigned a user role. User roles control the data that users can view and the tasks that users can perform. Users can also be assigned multiple roles, but this should be done with caution.

There are five provider user roles:

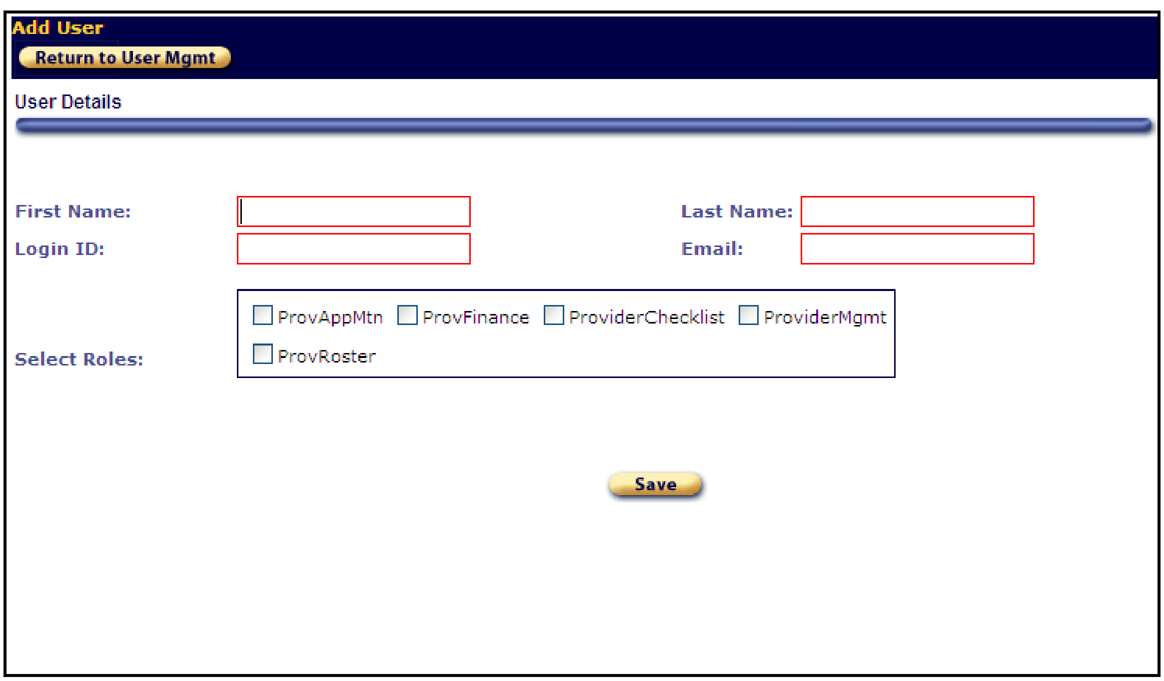
- Each provider is initially assigned one account with the **Provider Management** (ProviderMgmt) role. This user is the main person associated with your company and its sites. This person can log into PANDA and perform all tasks that providers are authorized to perform. This user can also set up PANDA accounts for provider employees to allow them to perform limited tasks, by assigning them a different role.
- Users assigned the **Provider Application Maintenance** (ProvAppMtn) role can enter application data and view the status of the provider's application. They cannot add other users or edit your Company Profile.
- Users assigned the **Provider Finance** (ProvFinance) role can view and print payment advices, as well as complete and submit reconciliation reports.
- Users assigned the **Provider Roster** (ProvRoster) role can enter roster and wait list data. However, they cannot submit rosters; only a user with the **Provider Management** role can perform final submission.
- Users assigned the **Provider Calendar** (ProvCalendar) role can enter and submit provider calendars.

Adding New Provider-Level Users

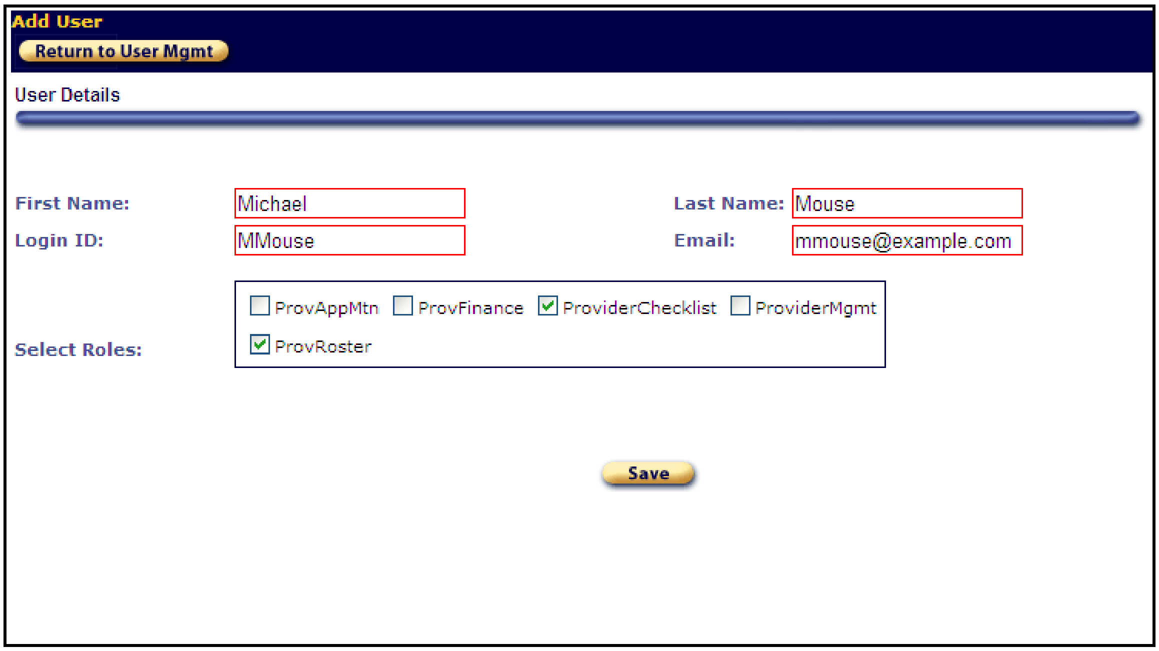
Providers can set up additional users. These users will be able to work with your company data in the **ProviderMgmt**, **ProvAppMtn**, **ProvRoster, ProvFinance,** or **ProvCalendar** role.

1. From the main menu select **User Mgmt**. The **User Search** screen displays.

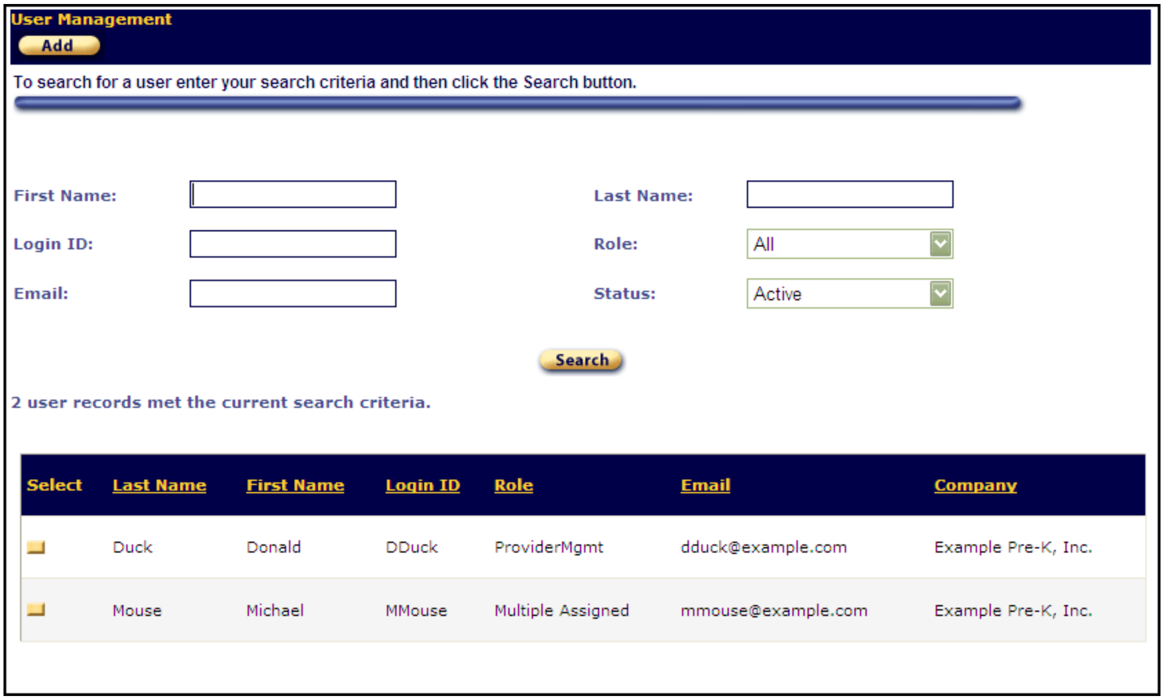
2. Click the **Add** button. The **Add User** screen displays.



3. Enter the new user's first and last names.
4. In the **Login ID** field, enter the name that the user will use to log into PANDA.
5. In the **Email** field, enter the new user's email address.
6. Click the **ProvAppMtn**, **ProviderMgmt**, **ProvRoster, ProvFinance, or ProvCalendar** role.
7. To add the new user, click the **Save** button. PANDA displays a message that states that the user was saved. The user can now log into PANDA (using *initpass* as their initial password) and perform the tasks permitted by their user role.

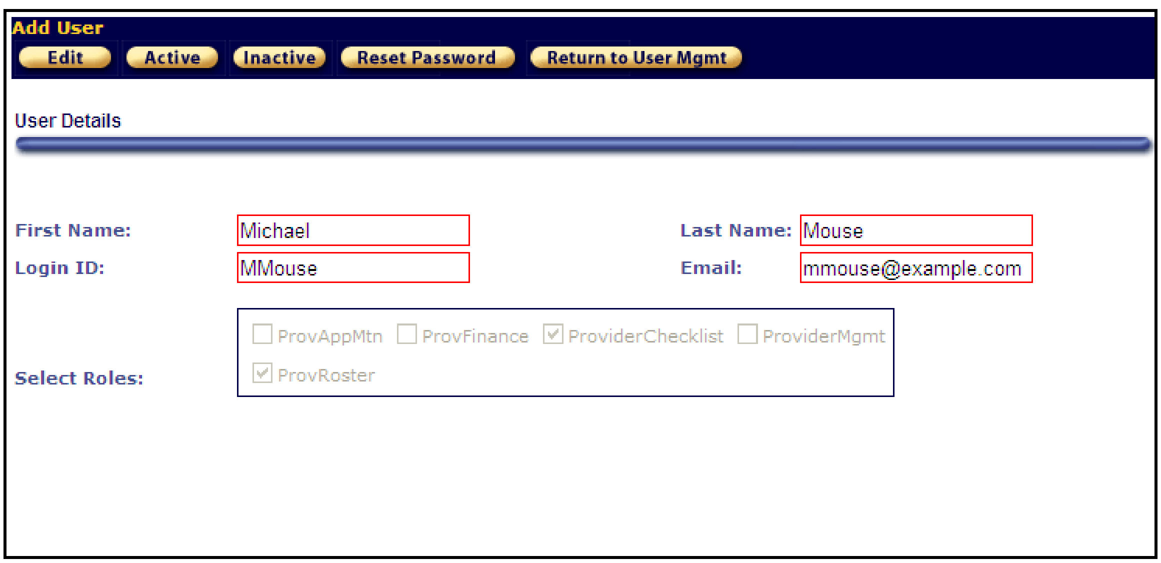


8. Click the **Return to User Mgmt** button. The **User Search** screen displays.
9. Click the **Search** button. PANDA lists the new user in the search results.



Editing User Accounts

1. To edit a user account, click the yellow **Select** button next to the user's last name on the **User Search** screen. The **User Details** screen displays in view-only mode.



2. You can perform the following tasks:

   - To reset the user's password to the default initial password, click the **Reset Password** button. PANDA will send the user an email notification and prompt them to select a new password at the next login.

- To change the user's name, login ID, email address, or role, click the **Edit** button, make your changes, and then click the **Save** button. PANDA updates the user information.
- To terminate the user's access to PANDA, click the **Inactive** button. Use this button with caution; if you inactivate yourself, you will be immediately logged out of PANDA and will be unable to log back in.
- To activate an inactive user, click the **Active** button.
- To search for a different user, click the **Return to User Mgmt** button.