

California Cash For College Organization User Guide

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Overview

This training guide is for the users of the California Cash for College (CCFC) Workshop Management System (WMS). WMS is used to streamline the CCFC workshop process that are hosted by the California Student Aid Commission's CCFC Community Partners. CCFC workshops offer students hands-on assistance in completing the Federal Application for Federal Student Aid (FAFSA) or California Dream Act Application (CADA) and/or Chafee application for Foster Youth in a computer lab setting.

There are several groups of users who will use WMS; therefore, this training document is divided into sections to help those users successfully navigate WMS. The first section is dedicated to Regional Coordinating Organizations (RCOs) admin users (termed Regional Admin) who oversee organizations in their corresponding regions throughout California. Organization users include the universities, colleges, high schools and partner agencies that host the CCFC workshops. The final section is for student users searching for and registering to attend a CCFC workshop

Register Organization

Organizations are the primary group that host student workshops, although RCOs also host some workshops.

Organizations who want to host student workshops can register themselves at the Workshop Management System (WMS) website.

2016-17 Workshop Information

Cash for College workshops start October 1, 2016 and run through the March 2, 2017 Cal Grant deadline. Workshop registration will be available August 15, 2016 – please check back to search and register to attend a FREE Cash for College workshop!

Become an Approved Partner

Organization registration for 2016-17 California Cash for College (CCFC) workshops is now open! To learn more about what it takes to become an approved CCFC Partner, please view our Partnership Agreement.

Thank you for your interest in hosting a CCFC workshop in your area. Please **register** to become an approved Cash for College Partner.

Once your request has been approved, you will receive information electronically to complete your account creation to access the CCFC Workshop Management System (WMS). You will login to WMS to register your workshops, assign site users and contacts, order materials, and access training and useful resources to make your workshop successful.

Elected Officials Only

Enter Elected Official E-mail

Get Workshop Information

Announcements

Become an approved Cash for College Partner:
Become an approved Cash for College Partner
(Organization, Institution, or Agency) to host a Cash for

From the WMS portal page, on the left side you will see a “Become an Approved Partner” section. In that section, click on the “register” button as noted above.

NOTE: IF YOU HAVE HOSTED A CASH FOR COLLEGE WORKSHOP IN THE PAST, PLEASE SKIP TO PAGE 5 – ENTERING ACTIVATION CODE. YOU WILL RECEIVE AN EMAIL FROM WMS WITH YOUR ACTIVATION LINK AND CODE. IF YOU HAVE NOT RECEIVED YOUR ACTIVATION LINK AND CODE, PLEASE CONTACT THE STATEWIDE OFFICE AT CASHFORCOLLEGE@CSAC.CA.GOV.

CA.GOV California Student Aid Commission CASH FOR C//LLEGE

Home | Organization | Create Organization

APPLY TO BECOME A PARTNER AGENCY

Agency Information

Name *

Address Line 1 *

Address Line 2

City * **County *** **State *** **Zip Code ***

Calaveras

Phone * **EXT**

There are three sections to this screen. The first is information about the organization.

Primary Contact Information

Last Name * **First Name *** **Middle Initial**

☐ Same as Organization address

Address Line 1 *

Address Line 2

City * **State *** **Zip Code ***

Phone **EXT**

Mobile Phone **Email *** **Confirm Email ***

The second covers who is the primary contact at the organization. You can use the “Same as Organization Address” checkbox to pre-populate the address if it is the same address as the organization. You can edit any of the fields as needed.

Payee Information(Site Support Funding)

Payable To *	Last Name *	First Name *	Middle Initial
<input type="text" value="Payable To"/>	<input type="text" value="Last Name"/>	<input type="text" value="First Name"/>	<input type="text" value="Middle Initial(Optional)"/>

☐ Same as Primary Contact Information

Address Line 1 *

Address Line 2

City *	State *	Zip Code *
<input type="text" value="City"/>	<input type="text" value="State"/>	<input type="text" value="Zip Code"/>

Phone	EXT
<input type="text" value="Phone"/>	<input type="text" value="EXT"/>

Mobile Phone	Email *	Confirm Email *
<input type="text" value="Mobile Phone"/>	<input type="text" value="Email"/>	<input type="text" value="Confirm Email"/>

The final section is the information on who is to receive the site support funding check. Again, you can use the “Same as Primary Contact Information” checkbox to pre-populate fields these fields.

Fill out each section on the screen and click the “Submit” button at the bottom of the screen.

Once the registration information has been entered, the Regional Admin of your region will review your request. If your request is approved, you will receive an email confirming your registration. That email will contain a link to a temporary web page. In another email you will receive a validation/activation code that can be entered in the temporary web page.

California Student Aid Commission

1. Validation Code
2. Login Info
3. User Info
4. Profile Settings

5. Finish

Activation Code *

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Enter your activation code from the email and click “Next”.

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California Student Aid Commission CASH FOR COLLEGE

1. Validation Code 2. Login Info 3. User Info 4. Profile Settings 5. Finish

User Name *

Enter User Name

New Password *

New Password

Confirm Password *

Confirm Password

Previous Next Cancel

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Enter the user name that you would like to use when logging into the WMS application. The user name must meet the following criteria:


- Be between 4 and 128 characters in length.
- Contain both Alpha and numeric characters
- Not contain spaces
- Is case in-sensitive

The password must:

- Be between 8 and 64 characters
- Contain at least one of each of these: number, upper case letter, lower case letter and special character.
- Special characters include ! # \$ ^ & - _
- Must not be a word in the dictionary
- Not contain any spaces
- Is case sensitive

Confirm your password and click “Next”. This will bring you to the Security questions page.

California Student Aid Commission



1. Validation Code

2. Login Info

3. User Info

4. Profile Settings

5. Finish

Choose a Security Question?

Answer

Choose a Security Question?

Answer

Choose a Security Question?

Answer

Previous

Next

Cancel

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Select three security questions and complete your answers for each question. Answers must be at least 4 characters in length. Click “Next” to verify your profile settings.





1. Validation Code

2. Login Info

3. User Info

4. Profile Settings

5. Finish

Last Name *

First Name *

Middle Initial

Address Line 1 *

Address Line 2

City *

State *

Zip Code *

Phone

EXT

Mobile Phone

Email *

Previous

Next

Cancel

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Please verify that your prepopulated information is correct, if not, you can modify any fields as needed and click “Next”.

Before you finish your setup, you will be prompted to agree to the User License Agreement (ULA). Click to view and read the agreement then check the “I agree to the Terms & Conditions” box and select “finish”.

Once you have finished your registration you will be prompted to login. You can now start creating and managing Workshops, see Workshop Management in the next section for details. You can also add Workshop Site Users and Site Contacts for your organization.

For the user role, a Workshop Site User can create and deactivate Site Contacts and manage Workshops, whereas Site Users can only view Workshop data.

To create a new Workshop Site Users and Site Contacts you will need to log into WMS as the Organization Primary Contact.

User Management

Creating users

There are three Organization users associated with Workshops.

The Organization Primary Contact (OPC) is the single user in the Organization that has access to all the information in the Organization. The OPC is assigned to all workshops with that organization. The OPC can create users with the other two user roles.

The Workshop Site User can create and edit workshops and place orders. They are assigned to any workshops they create. They can assign and remove Site Contacts to/from workshops. The Workshop Site User can also create Site Contact users.

The Site Contact has read only access to the workshops they are assigned to by the OPC or Workshop Site User.

To create a new user, login to WMS and click on WMS Users button on the left side of the screen.

Welcome : rocky
RiversideOrg
Organization Primary
Contact
Settings ▾

Dashboard

WMS Users ▾

RCO <

Organization <

Workshop <

Workshop Management System Users

Home / WMS Users

ADD

Search Criteria

Last Name First Name E-Mail User Role Status

First Name Last Name Address Super Admin Active

Show 10 entries

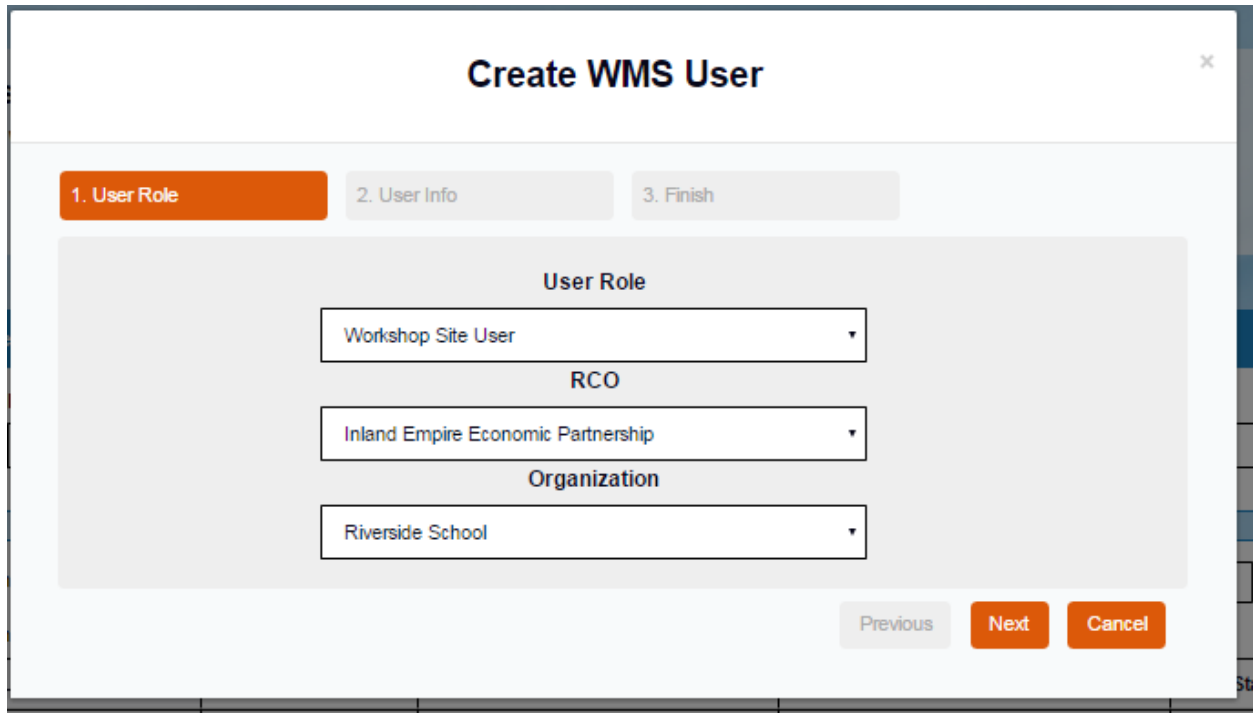
Search: Copy CSV Excel PDF Print

Showing 1 to 5 of 5 entries

Last Name	First Name	E-Mail Address	User Role	User Status	Action
Carrasco	Elena	retna.mani@csac.ca.gov	Regional Admin	Active	View
RiversideOrg	rocky	mel.eelkema@csac.ca.gov	Organization Primary Contact	Active	View
SCRiverside	fred	mel.eelkema@csac.ca.gov	Site Contact	Active	View
SCRiverside2	Rocky	mel.eelkema@csac.ca.gov	Site Contact	Active	View
WSURiverside	Riverside Org	mel.eelkema@csac.ca.gov	Workshop Site User	Active	View

Previous 1 Next

On the Manage User screen, click the Add button, which will bring you to the New User screen.

A screenshot of a 'Create WMS User' dialog box. The title bar at the top says 'Create WMS User' with a close button (X) on the right. Below the title bar, there are three tabs: '1. User Role' (highlighted in orange), '2. User Info', and '3. Finish'. The main content area is a light gray box containing three dropdown menus. The first is labeled 'User Role' and has 'Workshop Site User' selected. The second is labeled 'RCO' and has 'Inland Empire Economic Partnership' selected. The third is labeled 'Organization' and has 'Riverside School' selected. At the bottom right of the dialog box, there are three buttons: 'Previous' (disabled), 'Next' (highlighted in orange), and 'Cancel' (highlighted in orange).

Create WMS User

1. User Role 2. User Info 3. Finish

User Role

Workshop Site User ▼

RCO

Inland Empire Economic Partnership ▼

Organization

Riverside School ▼

Previous **Next** **Cancel**

Click on the User Role pull down and select the correct user role. Your role within WMS will depend on which user roles you can create. Depending on the role created will define which other menus come up. Your RCO should already be filled in. Use the Organization pull down to select the organization you want this user to be associated with or it may be already filled in if your role is associated with an organization.

Click Next to define the user information.

Create WMS User

1. User Role

2. User Info

3. Finish

Last Name *

Smith

First Name *

Sam

Middle Initial

J

Address Line 1 *

1800 W. Main St

Address Line 2

Suite 700

City *

Riverside

State *

CA

Zip Code *

90521

Phone

8005551212

EXT

17

Mobile Phone

9015551212

Email *

user@gmail.com

Confirm Email *

user@gmail.com

Previous

Next

Cancel

Fill in the information on the user.
Click Next to Finish the process.

Create WMS User

1. User Role

2. User Info

3. Finish




We will email a System ID and a temporary password to the user (in two separate emails)


Previous

Finish

Cancel

This will generate two emails as noted above.
Click on the link in the email.





1. Validation Code

2. Login Info

3. User Info

4. Profile Settings

5. Finish

Activation Code *

Previous

Next

Cancel

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Enter the activation code and click Next.




Enter the user name that you would like to use when logging into the WMS application. The user name must meet the following criteria:


- Be between 4 and 128 characters in length.
- Contain both Alpha and numeric characters
- Not contain spaces
- Is case in-sensitive

The password must:

- Be between 8 and 64 characters
- Contain at least one each, numeric, upper case, lower case and special character.
- Special characters include ! # \$ ^ & - _
- Must not be a word in the dictionary
- Not contain spaces
- Is case sensitive

Confirm your password and click Next. This will bring you to the Security questions page.

 California Student Aid Commission 



1. Validation Code

2. Login Info

3. User Info

4. Profile Settings

5. Finish

Choose a Security Question?

Answer

Choose a Security Question?

Answer

Choose a Security Question?

Answer

Previous

Next

Cancel

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Select three security questions and complete your answers for each question. Answers must be at least 4 characters in length. Click Next to verify your profile settings.

 California Student Aid Commission 



1. Validation Code

2. Login Info

3. User Info

4. Profile Settings

5. Finish

Last Name *	First Name *	Middle Initial
<input type="text" value="Smith"/>	<input type="text" value="Sam"/>	<input type="text" value="Middle Initial (Optional)"/>
Address Line 1 *		
<input type="text" value="100 Main St"/>		
Address Line 2		
<input type="text" value="Address Line 2 (Optional)"/>		
City *	State *	Zip Code *
<input type="text" value="Orland"/>	<input type="text" value="CA"/>	<input type="text" value="95000"/>
Phone	EXT	
<input type="text" value="(800) 555-1212"/>	<input type="text" value="EXT"/>	
Mobile Phone	Email *	
<input type="text" value="Mobile Phone"/>	<input type="text" value="csac.email@gmail.com"/>	

PreviousNextCancel

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Please verify that your prepopulated information is correct, if not you can modify any fields as needed, and click Next.

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California Student Aid Commission CASH FOR COLLEGE

1. Validation Code 2. Login Info 3. User Info 4. Profile Settings 5. Finish

California Student Aid Commission (CSAC/Commission) California Cash for College (CCFC) – Information Security and Confidentiality Agreement

The information Security and Confidentiality Agreement is required by the California Student Aid Commission (Commission) from any person or entity (high school, post-secondary educational institution, agent, program, or 3rd party) requesting access to a Commission information technology system. To obtain access to the CCFC Workshop Management System (WMS), please read and agree to the terms outlined in the Information Security and Confidentiality Agreement.

☒ I agree to the [Terms & Conditions](#)

Previous Finish Cancel

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Before you finish your setup, you will be prompted to agree to the User License Agreement (ULA). Click to view and read the agreement then check to agree box and click finish.

Deactivating a user

To deactivate a user, logon to WMS and click on WMS User.

Welcome : rocky

RiversideOrg

Organization Primary Contact

Settings

Dashboard

WMS Users

RCO

Organization

Workshop

Log out

Workshop Management System Users

Home / WMS Users

ADD

Search Criteria

Last Name

First Name

E-Mail

User Role

Status

First Name

Last Name

Address

Super Admin

Active

Show 10 entries

Search:

Copy

CSV

Excel

PDF

Print

Showing 1 to 6 of 6 entries

Last Name	First Name	E-Mail Address	User Role	User Status	Action
			Regional Admin	Active	View
RiversideOrg	rockey		Organization Primary Contact	Active	View
SCRiverside	fred		Site Contact	Active	View
SCRiverside2	Rocky		Site Contact	Active	View
Smith	Sam		Workshop Site User	Active	View
WSURiverside	Riverside Org		Workshop Site User	Active	View

Previous

1

Next

On the Manage User screen you will see all active users in your region using the WMS system.

You can use the search box to help find the specific user you want to deactivate. Once you have located the user, click on View for that user.

Settings

Dashboard

Rco & Org Activation

WMS Users

RCO

Organization

Workshops

WMS Userinfo

Home / WMS Users

EDIT USER INFO

Name: Smith Sam

Role: Site Contact

RCO: The Regents of the University of California / CFC RCO

Address1: 100 Main St

Address2:

City: Orland

State: CA

Zipcode: 95000

Phone: (800) 5551212 EXT.

Mobile:

Email: csac_email@gmail.com

Created Date: 6/21/2016 10:14:12 AM

Updated Date: 6/21/2016 10:14:12 AM

Created User: P@sswOrd ccfadmin1

Updated User: P@sswOrd ccfadmin1

Deactivate

To deactivate this user, use the Deactivate button.

Do you want to deactivate this user?

Name: Smith, Sam

Address1: 100 Main St

Address2:

City: Orland

State: CA

Zipcode: 95000

Phone: (800) 5551212 EXT:

Mobile:

Email: csac.email6@gmail.com

Created Date: 6/21/2016 10:14:12 AM

Updated Date: 6/21/2016 10:14:12 AM

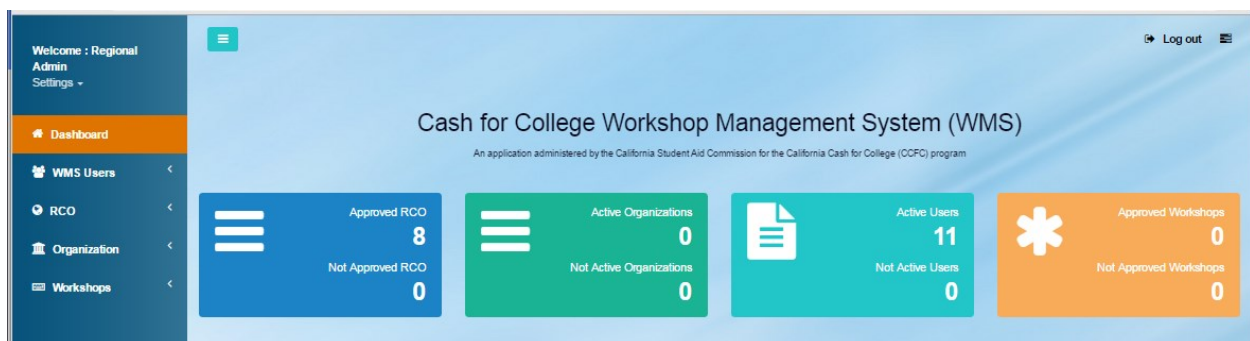
Close

Deactivate User

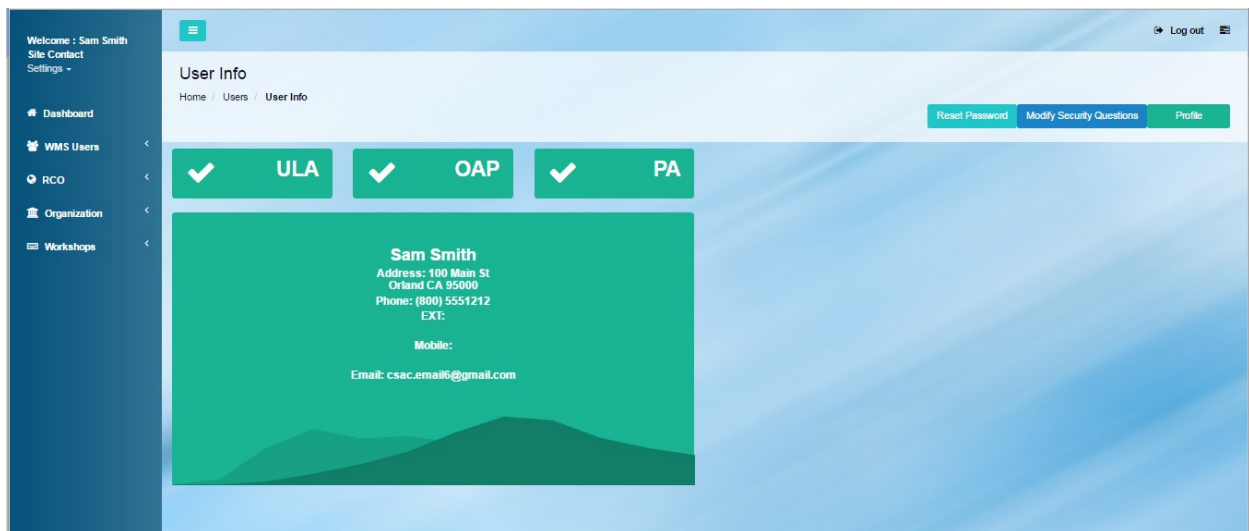
Select the Deactivate User button to confirm deactivation.

Changing your password / Edit your profile

As a user within WMS you can change your password and manage your profile as needed. Log into WMS.

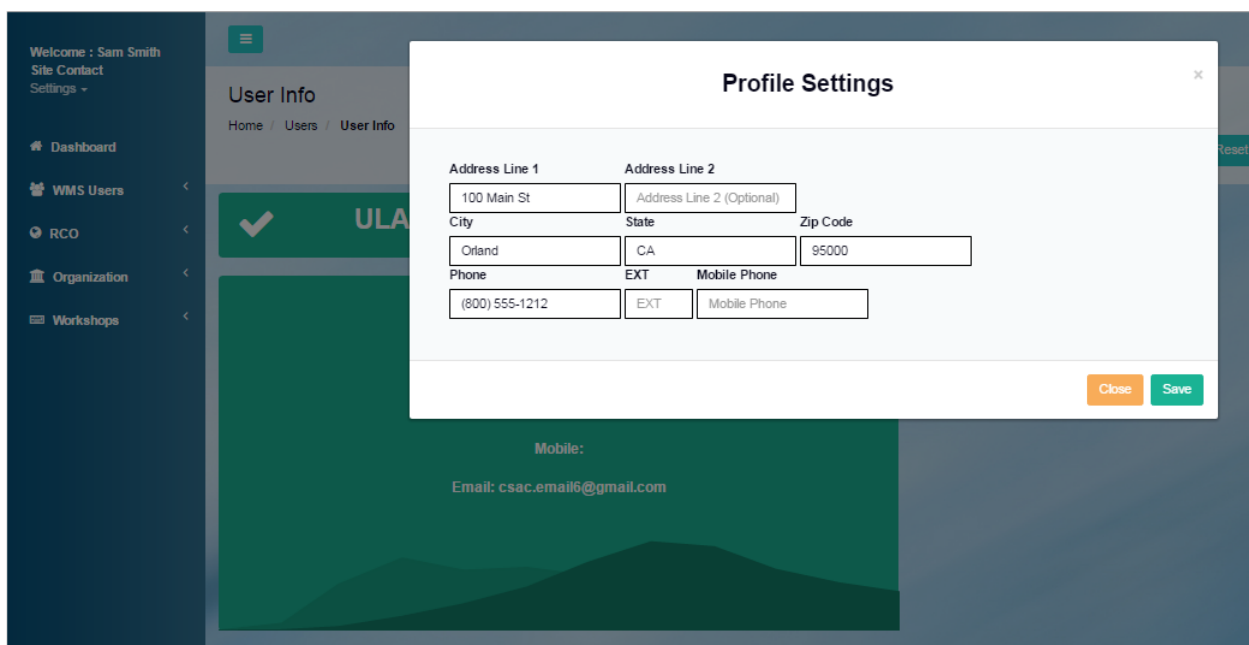


On the upper left corner below the “Welcome”, you will see the Settings pull down menu. Click on Settings. Click on Profile Info.



From here you can Edit your profile, Modify your security questions, or reset your password.

To edit your profile, click the Profile button.



You can Edit your profile and click the Save button.

To change your security questions click on the Modify Security Questions button.

The screenshot shows a web application interface with a dark blue sidebar on the left containing navigation links: 'Welcome : Sam Smith', 'Site Contact', 'Settings +', 'Dashboard', 'WMS Users', 'RCO', 'Organization', and 'Workshops'. The main content area is titled 'User Info' with a breadcrumb 'Home / Users / User Info'. A modal window titled 'Security Questions' is open, featuring three dropdown menus with their respective answers entered in text boxes below them: 'What was your childhood nickname?' with 'nickname', 'What is the name of your favorite childhood friend?' with 'friend', and 'What was the name of your first stuffed animal?' with 'stuffed'. At the bottom right of the modal are 'Close' and 'Save' buttons.

Modify any of the security questions or your security answers. Answers must be at least 4 characters in length. Click the Save button.

To modify your password, click the Reset Password button.

The screenshot shows the same web application interface as the previous image. A modal window titled 'Reset Password' is open, displaying three input fields: 'Old Password', 'New Password', and 'Confirm Password'. At the bottom right of the modal are 'Close' and 'Save' buttons. Below the modal, the email address 'Email: csac.email6@gmail.com' is visible on the background page.

Enter your current password and your new password, then click the Save button.

Workshop Management

To manage Workshops in WMS, you need to log in as Organization Primary Contact or Workshop Site User (Site Contact can only view workshops). On the left side of the page, click on Workshop.

If there are workshops that need to be approved you will not see them. Only approved workshops will be shown.

Create workshop

To create a workshop, go to the main WMS page and click on the Workshop button on the left side of the page. From the Manage Workshop page, click on Create Workshop on the upper right part of your screen.

x

Create Workshop

RCO
Organization

East Bay/ Cal-SOAP ▾

Organization ▾

1. Site Info

2. Workshop Detail

3. Services Offered

4. Languages

5. Workshop Description

Site Name *

Test Workshop

- test workshop
- Test Workshop
- test workshop 1

Type Of Organization *

Select Type Of Organization ▾

Address Line 1 *

Address Line 1

Address Line 2

Address Line 2 (Optional)

City *

City

State *

State

Zip Code *

Zip Code

Phone *

Phone

EXT

EXT

Previous

Next

Cancel

Your RCO name will be populated in the RCO field. Use the Organization pull down menu to select your organization. Fill in the Site Name that you want to use as a reference to this workshop. When creating the Workshop site name WMS will look for similar workshop names. You can click next to a workshop to auto populate the fields to make it easier for you. Select the type of the organization that best fits your organization/partner agency. This is used for reporting by the Commission. Enter the remaining site information, click Next to enter the date / time and other information.

✕

Create Workshop

RCO
Organization

The Regents of the University of California / CFC RCO ▾

Chico Org ▾

1. Site Info

2. Workshop Detail

3. Services Offered

4. Languages

5. Workshop Description

Start Time *

End Time *

Workshop Date *

📅

Number of planned Computers *

Anticipated Students *

New Volunteers *

Volunteers *

Maximum Site Capacity*

Previous

Next

Cancel

Fill in the required fields as:

Start and end times – note that there may be limitations on the times set by the administrator.

Workshop Date – note there may be limitations on the available dates see your CCFC

Administrator for more details.

Number of Computers – How many computers will be there for students to use.

Number of anticipated students – How many students do you expect to have at the workshop

Number of new volunteers – Number of volunteers who have not helped at a workshop before.

Number of volunteers – How many other volunteers who have helped at a workshop before.

Maximum number of students – this is the maximum capacity of the room or building (if more than this number of students sign up for your workshop you will be notified).

Click Next to enter the Services offered at the workshop.

Create Workshop ✕

RCO
Organization

The Regents of the University of California / CFC RCO

Chico Org

1. Site Info

2. Workshop Detail

3. Services Offered

4. Languages

5. Workshop Description

<input type="checkbox"/> ADA (Americans with Disabilities Act)	<input type="checkbox"/> ASL (American Sign Language)	<input type="checkbox"/> FAFSA on the Web worksheet presentation
<input type="checkbox"/> Cal Grant and other finicial aid overview	<input type="checkbox"/> AB540/CA Dream Act assistance	<input type="checkbox"/> Financial literacy training
<input type="checkbox"/> Income tax assistance	<input type="checkbox"/> Orphan / Foster Youth	<input type="checkbox"/> Refreshments
<input type="checkbox"/> Child Care	<input type="checkbox"/> Other Services	

Previous

Next

Cancel

Use the check boxes to indicate which services will be offered at the workshop. If you check Other Services, you will get a chance to explain those services on the workshop description tab later. Click Next to define the languages offered.

Create Workshop

RCO

Organization

The Regents of the University of California / CFC RCO

Chico Org

1. Site Info

2. Workshop Detail

3. Services Offered

4. Languages

5. Workshop Description

☐ English

☐ Spanish

☐ Korean

☐ Punjabi

☐ Chinese

Previous

Next

Cancel

Use the check boxes to indicate which languages the workshop will be held in.
Click Next to enter a description.

Create Workshop

RCO: The Regents of the University of California / CFC RCO
Organization: Chico Org

1. Site Info 2. Workshop Detail 3. Services Offered 4. Languages
5. Workshop Description

This will be a great opportunity for you to attend a workshop.

Choose File Empty File.docx
Upload

Previous Finish Cancel

Use the text box to enter a description of the workshop and any special features or offerings. This description will be displayed when a student asks for workshop details when searching for a workshop. You can also upload a file that will be viewable by students searching for workshops. This file could be a flyer or other promotional information regarding your workshop.

Click Finished when all data has been entered.

When the workshop has been entered and approved by the RCO or California Cash for College (CCFC) administrator, students can start to register for your Workshop.

If for any reason your Workshop needs to be canceled, you can cancel it or it can be canceled by your RCO or by the CCFC team.

If there are details of the workshop that need to be changed, like the anticipated number of students, number of computers or the address, you can update that information on the edit workshop menu. If the address is changed, WMS will send an email to all registered students notifying them of the change.

Assign users to workshops

By default if a Workshop Site Users creates a workshop, that user is assigned to that workshop. You can also assign other users to workshops.

To assign users to workshops, log into WMS as the Organization Primary Contact or Workshop Site User. Click on the Workshop button on the left panel. Click on the Detail button by the workshop you want to assign users to.

View Workshop Info
Home / Workshop / View Workshop Info

Site Info [Edit](#)
Site Name: test workshop
Type Of Organization : Other Community Partners
Address Line 1: 110 main st
Address Line 2:
Sacramento, CA, 95000
Phone: 8005551212
EXT :
Workshop Description
This will be a great opportunity for you to attend a workshop.

Workshop Detail [Edit](#)
Start Date: 06/25/2016 Start Time: 7:00 PM End Time: 9:00 PM
Number Of Planned Computers: 75 Anticipated Students: 75 New Volunteers: 5 Volunteers: 15
Maximum Site Capacity: 125

Services Offered: [Edit](#)
Languages: English

[Create New Users](#) [Add Users to this Workshop](#)

Show 10 entries Search: [Copy](#) [CSV](#) [Excel](#) [PDF](#) [Print](#)

Showing 1 to 1 of 1 entries

Last Name	First Name	E-Mail Address	User Role	Workshop	Action
ChicoOrg1	P@sswOrd	csac.email3@gmail.com	Organization Primary Contact	test workshop	Remove

[Previous](#) 1 [Next](#)

[Click here to see discussion history](#)

Status: Approved [Cancel](#) [Not Approved](#)

Click the Add Users to this Workshop button toward the middle left part of the screen.

Add Users to this Workshop

Organization Users

Sam Smith (Workshop Site User)

Close

Save changes

Reset changes

The users that can be assigned to this workshop will be available in the pull down menu. Select the user you want to assign and click on Save Changes. Once assigned to a workshop the Workshop Site User can view and edit the workshop. When a Site Contact has been assigned to a workshop they can then view the details of that workshop.