



# WSAC Portal Training Managing Portal Users and Access

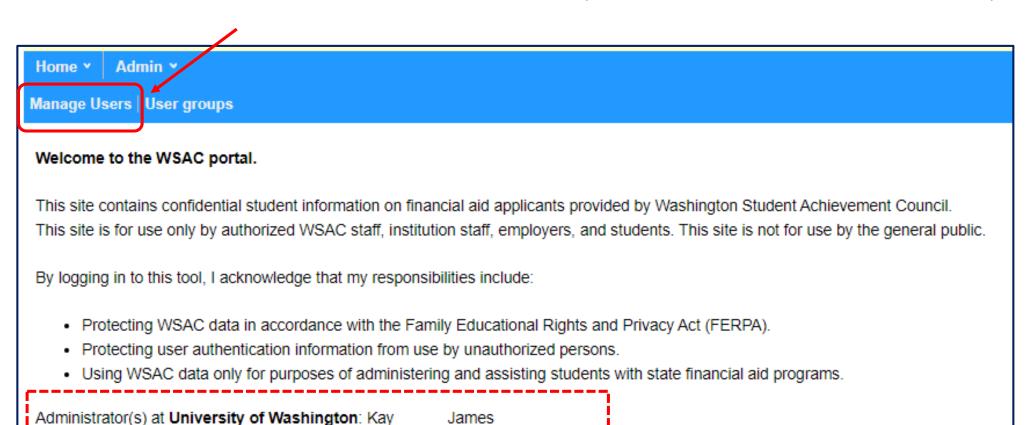


- Washington College Grant, College Bound Scholarship, and Passport To Careers are all administered through CSAW in the WSAC Portal and requires each Financial Aid Administrator to obtain their own Portal login.
- At most colleges, the Financial Aid Director manages Portal access for their staff.
- It is the responsibility of the Financial Aid Director to promptly remove Portal access for staff who should no longer have access.
  - Delete users who no longer work for the college or no longer have a legitimate need to access the Portal.

- Access May include the following programs or applications:
  - Secure messaging and forms
  - WCG
  - CBS
  - Passport to College
  - SWS
  - WASFA
  - Unit Record Reporting
- May include the following access functions:
  - Can use CSAW
  - Have access to institution functions
  - Can make payment requests

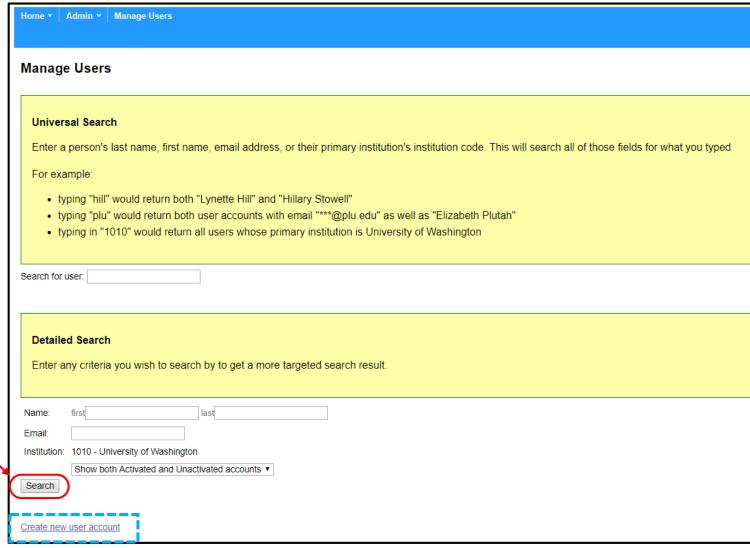


- Log in to the Portal Click on Manage Users
  - The home page will provide you with the name/s of your schools Portal Administrator/s.



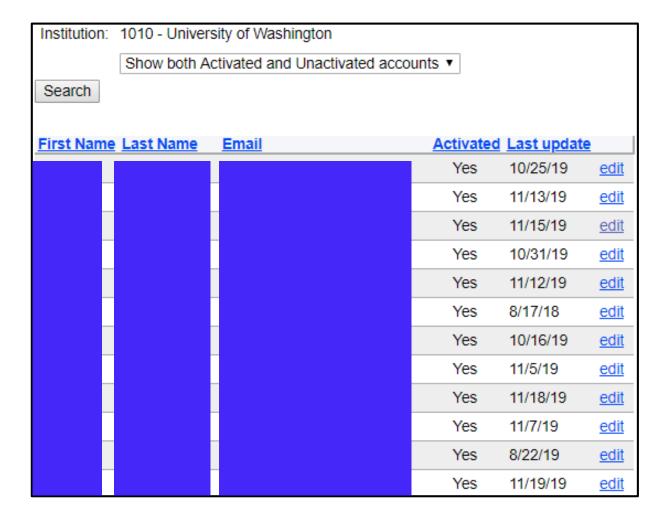


- To update a current users access, search for the person to bring up their account.
  - Search for user
  - Detailed Search
- Use the 'Search' box to bring up all staff that have access.
- Click on 'Create new user account' to enter new staff.





• Click on 'edit' to update or delete staff access



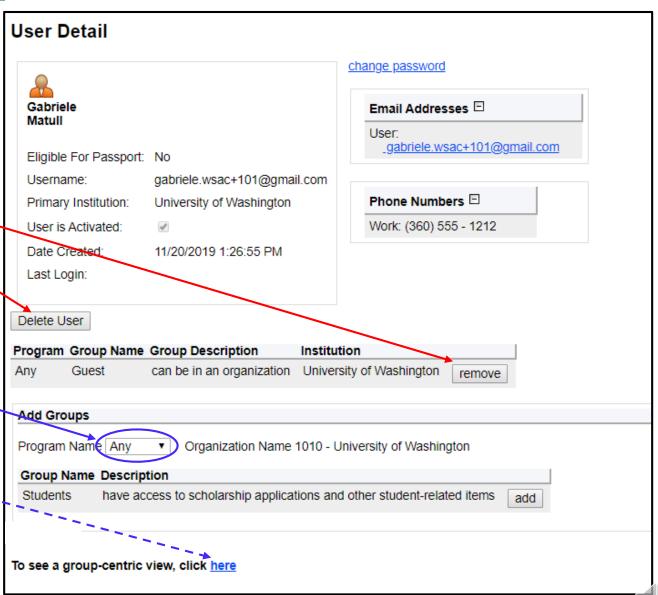


- Click on 'Create new user account'
  - Enter information
  - Copy the randomly generated password, or enter a new password.
    - You will need to provide this to the user for them to log on for the first time.
  - Click 'Create Account'

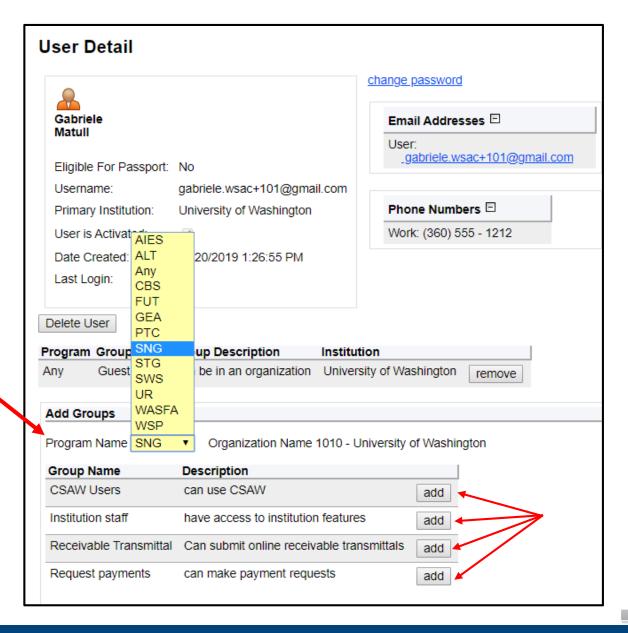
Create User Account	
Use this to create a user account. Once the account has been created you will be redirected to a page where you can adjust the permissions of this user	
First Name	Gabriele
Last Name	Matull
Email Address	gabriele.wsac@gmail.com
Phone Number	(360 ) 555 - 1212 Ext
Primary Organization	1010 - University of Washington
Password	V5J\$yWm^k7
Confirm Password	V5J\$yWm^k7
Create Account	



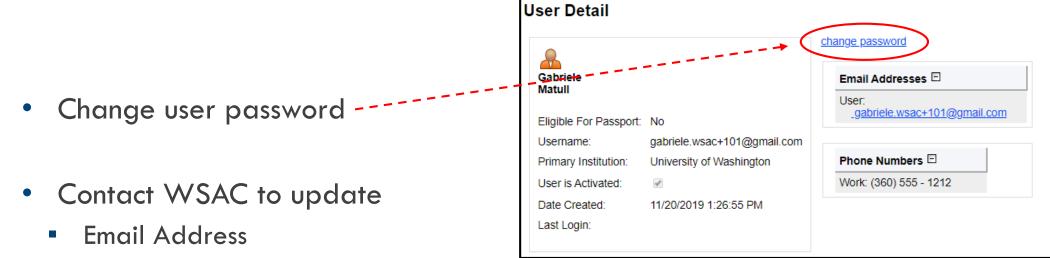
- User Detail
  - Delete user or remove access to specific permissions
  - Add user access to specific programs
    - In 'Add Groups' click on drop down menu
  - To see all staff that have a certain permission, click on 'To see a group-centric view'---



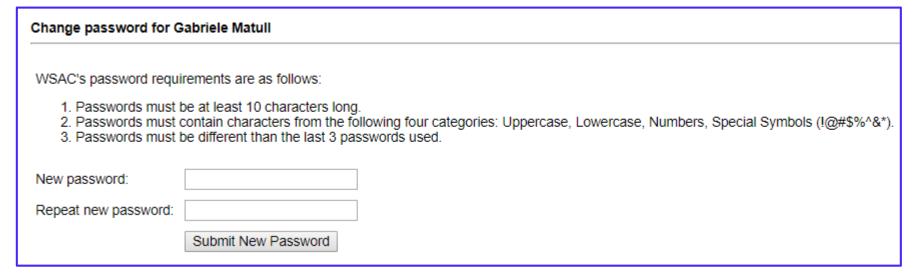
- User Detail
  - Choose the program to which you want to give access
    - Available group user access is displayed
    - Click 'add'
  - You will need to do these steps for each program
  - Exit when finished







- Phone Number
- Name



# **Questions?**

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1-888-535-0747 Opt 3

Thank you for joining us!

