



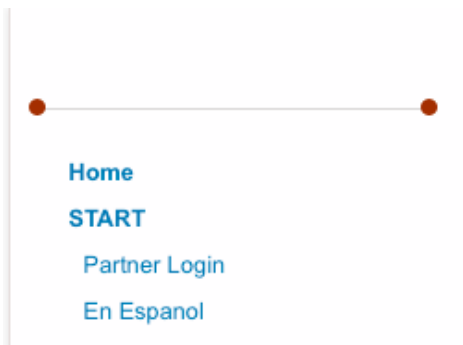
## Bridge to Benefits Partner Account Management on the Revamped Site

Watch the following two-part tutorial to learn the new features of the site, including account management, generating data reports, and updates to the screening tool.

Part I: [www.anymeeting.com/cdfmn/EE53DF818648](http://www.anymeeting.com/cdfmn/EE53DF818648)

Part II: [www.anymeeting.com/cdfmn/EE53DF808046](http://www.anymeeting.com/cdfmn/EE53DF808046)

### I. Logging In



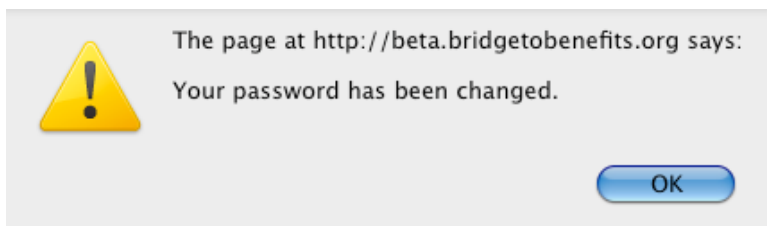
**Step 1:** Click on Partner Login on the left side bar

**Step 2:** Enter your current username. All of your usernames have been transferred from the old site; however, the password feature is new. **If you're logging in for the first time your password will be b2b.** Your login is your username and password.

### **Step 3: Changing your password**

If you would like, you can change your password. Ensure that your password is easy to remember. To make it easy to remember you can leave it as b2b, make it the same as your username and/or keep all the same passwords for each of your organization's logins. If you forget your password you will have to contact Stephanie Hogenson at 651-855-1175 or [hogenson@cdf-mn.org](mailto:hogenson@cdf-mn.org).

Once logged in, you can select Change Your Password, if you wish. Fill out the pop up window with your current password in both the Current Password box and Confirm Password box. Enter your new password under New Password. After you hit "Change Password" a pop up box (see below) will appear to confirm that your password has been changed. You will not be logged out once your password has been changed, but you will need to enter your new password the next time that you log in.



## II. Updating Your Contact Information

After logging in for the first time and changing your password (if desired), please take the time to update your contact information, which is now being maintained within your partner dashboard. The contact information for each site should be the person who is the Bridge to Benefits point of contact at your organization. This person will receive notices from Children’s Defense Fund-Minnesota on updates to the site or programs included on the site. If you have multiple sites you can have the same or multiple contact persons for each site. That is up to your organization’s preference.

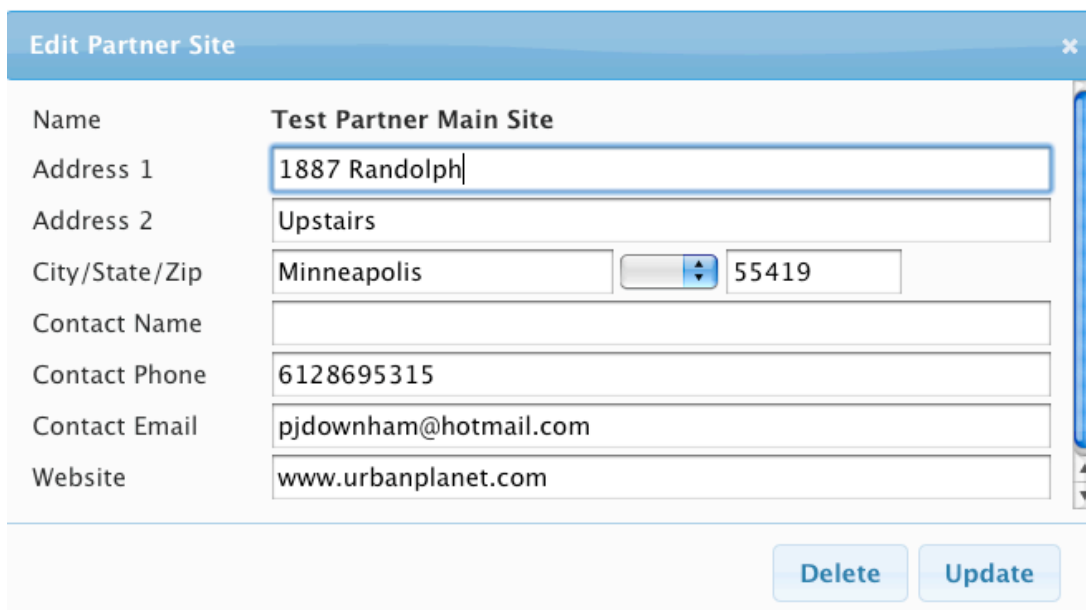
**Step 1:** On your partner dashboard, select Account Management

~Test Partner!!

- [Account Management](#)
- [Change Your Password](#)
- [Legacy Reports](#)

**Step 2:** To update the contact information, click on the site name listed under Partner Sites for which you would like to update the contact information.

**Step 3:** A box similar to the one below will appear. Update the necessary contact information and click update. You will have to do this for each site that contact information needs to be updated. There is no contact information needed for Staff logins.



The screenshot shows a web form titled "Edit Partner Site" with a close button (X) in the top right corner. The form contains the following fields:

Name	Test Partner Main Site	
Address 1	1887 Randolph	
Address 2	Upstairs	
City/State/Zip	Minneapolis	55419
Contact Name		
Contact Phone	6128695315	
Contact Email	pjdownham@hotmail.com	
Website	www.urbanplanet.com	

At the bottom right of the form, there are two buttons: "Delete" and "Update".

### III. Adding new logins

*The following instructions are for partner organizations that already have a Bridge to Benefits username. New partner organizations must contact Children's Defense Fund MN to get set up with a username. **If you already had a username(s) on the former Bridge to Benefits site, they will all be activated on the new launch.***

Most organizations that use Bridge to Benefits have one login that can be used for multiple users. If preferred, you can continue to use the new site with one login. However, if your organization would like to have multiple logins or already has multiple logins, the following instructions are important to learn how to manage and create logins. The benefit to having multiple logins is to track your data by screener or by site.

There are three types of logins on the new Bridge to Benefits site. All the types of logins can use the screening tool in the same way, but they have access to various levels of data:

**Admin Partner:** If a login is set as an Admin Partner it can see all the data and generate reports for all logins attached to that organization, including Admin Site and Screener logins associated with your organization. If you only have one login, then that login will be an Admin Partner and also an Admin Site.

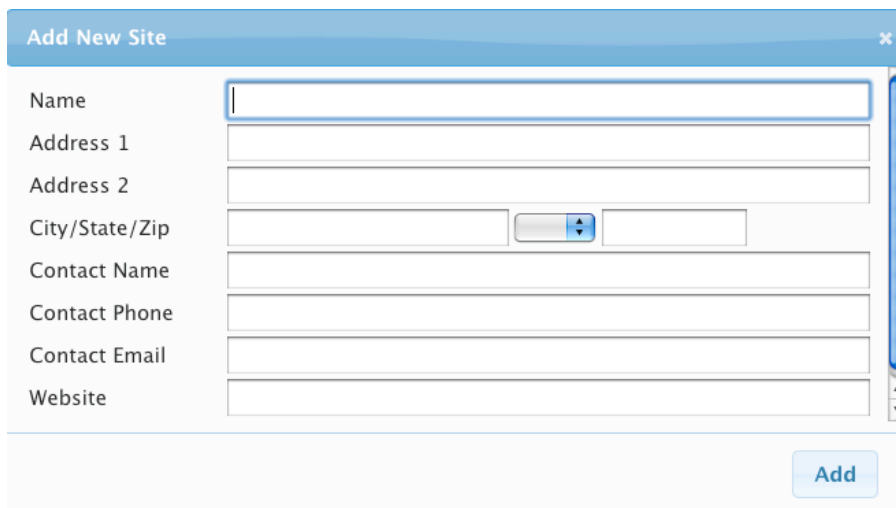
**Admin Site:** If a login is set as an Admin Site, it can see data for its login and for any screen logins associated with that site. Admin Site logins must be associated with an Admin Partner.

**Screener:** If a login is set as a screener, it must be associated with a Admin Site and will only see data associated with its login.

**To create new sites or logins, you must go into Account Management on your partner dashboard.**

#### **CREATING A NEW SITE:**

If you only have one username on the current site, you will already have a site created under your Admin Partner login. However, you may want to create multiple sites if you would like site users to different levels of data access. To create a new site, click on "Add New Site." Fill out the name and contact information for the site in the pop up window and click "Add." Now you are ready to create a new login to be associated with the new site.



The image shows a web form titled "Add New Site" with a blue header bar. The form contains the following fields:

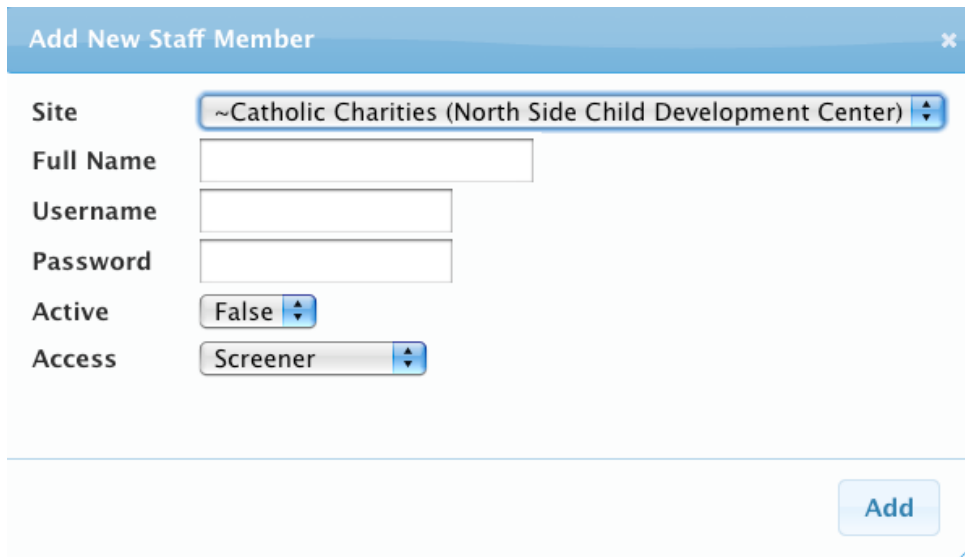
- Name:
- Address 1:
- Address 2:
- City/State/Zip:
- Contact Name:
- Contact Phone:
- Contact Email:
- Website:

An "Add" button is located at the bottom right of the form.

### CREATE A NEW LOGIN:

To create a new login, click on “Add New Staff Member.”

A pop up window like the one below will come up:



Select the Site from the drop down menu for which you would like the login associated. If you have just one login, your Site will already be created and is the same as your Admin Partner.

Under Full Name, enter the name for this Login. This is only for your reference; it will not be the username.

Enter the username and password you would prefer for the screener.

Under Active select “True” to make the login active. You can deactivate logins by clicking on the green button next to the login name. When you click on it, it will turn red to indicate that the login has been turned off.

Name	Site	Access	Last Login
Site 2	North Side	Admin_Site	
none	Main	Screener	
Josh TEST Downham	My Site	Screener	
Paul Downham	Main	Admin_Site	6/26/2013
Another test login	My Site	Admin_Site	6/18/2013
Stephanie	Anoka County Food Shelf	Screener	
test	North Side	Admin_Partner	6/26/2013

Under Access select what type of login access you would like the login to have (Screener, Admin Site or Admin Partner). See above for descriptions.

Then click Add. The new login should be listed under Staff member. You can reference it by Name, the Site it is associated with, it’s access and see that last time it was used under “Last Login.”

**Please contact Stephanie Hogenson with any questions or further assistance at 651-855-1175 or [hogenson@cdf-mn.org](mailto:hogenson@cdf-mn.org).**