



# SQUARES: Quick Reference Guide

## SQUARES Managers Guide

### Overview

- SQUARES access is permitted only for employees who require SQUARES data to provide better services to Veterans. If a given employee does not require SQUARES data so as to confirm Veteran eligibility, provide outreach services, or other similar tasks, that employee is not permitted to have a SQUARES account.
- As a SQUARES Manager, **it is your responsibility to ensure that only authorized users receive SQUARES access.** VA is counting on you to protect Veterans' sensitive information. It is up to you to make sure that only current employees of your organization with a need to know are approved for accounts, that employees register for SQUARES using professional email accounts belonging to your organization, and that SQUARES accounts are closed promptly when individuals no longer need them.
- This guide covers (1) how to screen new account requests, and (2) how to manage and deactivate existing users.

### Part 1: Reviewing New Account Requests

When individuals at your organization apply for SQUARES access, the requests go to you. You will receive an email notifying you of the request. Follow these steps to respond to it:

1. Log into SQUARES as usual, at [my.va.gov/SQUARES](http://my.va.gov/SQUARES), as outlined in the Account Access Guide. Then, select the **Approvals** tab from the SQUARES header.
2. Any new account requests will show in a list on this page. Select the **Approve** button if the individual works at your organization and requires SQUARES access for their work. Behind the scenes, the user's account will be created and they will receive an email informing them of the approval. If the individual does not work at your organization or does not require SQUARES access, select the **Reject** button. Once you make your selection, the record will be removed from your list of active requests.

**Do not approve the account** if any of the following is true:

1. The individual does not work at your organization.
2. The individual does not require SQUARES access for his/her job duties.
3. The email address displayed on the account request is a personal email address or does not belong to the individual. **For security, SQUARES users must use their work email address to register for SQUARES.** If your users inadvertently apply with a personal email (e.g. @gmail.com, @yahoo.com), you should reject their request and ask them to apply again using the correct address.

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#### My Pending Approval Requests

Super Users: This is a list of pending requests for manager-level SQUARES access. If the requesting individual is authorized to be a SQUARES manager for their organization, click Accept to grant them access. If this individual is not the approved manager for organization, click Reject.

Managers: This is a list of all pending requests for SQUARES access in your organization. If the requesting individual works at your organization and requires access to SQUARES for their work, please click Accept to grant them access. If you do not know requesting individual or they do not require access to SQUARES for their work, click Reject. (If you erroneously grant access to a user who should not have it, you can later revoke their access by clicking De-Activate in the Users tab.)

NAME	DATE SUBMITTED	ACTION
Sally StandardUser	Nov 9, 2018	Approve Reject



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### Part 2: Managing and Deactivating Users

You are responsible for ensuring no users maintain active SQUARES accounts past the point they require access for their job duties.

1. Please deactivate any users proactively when they leave their positions and no longer require access to SQUARES. When you select the **Users** tab in SQUARES, you will see a list of all active users in your organization. You can **Deactivate** a user by selecting the "Deactivate" button to the right of the individual's name.
2. For additional security, every six months, you are required to recertify all active users. **Any user you do not renew during the recertification periods in March and September will be deactivated on April 1 or October 1, respectively.** You will receive email reminders during the recertification periods. Recertifications are also managed on the Users tab:
  - a. Select the **Users** tab
  - b. Users with a red background and an asterisk next to their names are pending recertification
  - c. Select the **Recertify** button if these users still require SQUARES access, or the **Deactivate** button if they no longer do
    - i. Deactivating a user requires confirming the User Deactivation pop-up alert via the blue **Continue** button

The screenshot shows the SQUARES interface with the 'Users' tab selected. A table lists active users with columns for Name, Date Added, Last Recertification Date, and Action. A red box highlights the 'Users' tab in the navigation bar. A red box labeled '1' points to the 'Deactivate' button for a user. A red box labeled '2' highlights a row for 'Jackie Manager' with a red background and an asterisk next to her name. A red box labeled 'B' highlights the 'Recertify' and 'Deactivate' buttons for this user. A red box labeled 'C' highlights the 'Deactivate' button. A pop-up alert titled 'User Deactivation' is shown, asking for confirmation to continue. The 'Continue' button is highlighted in red.

NAME	DATE ADDED	LAST RECERTIFICATION DATE	ACTION
[Redacted]	2018-10-11	2018-11-08	Deactivate
Joe Manager	2018-11-08	2018-11-08	Deactivate
[Redacted]	2018-11-07	2018-11-07	Deactivate
Jackie Manager	2018-11-07	2018-06-05*	Recertify Deactivate
[Redacted]	2018-11-08	2018-11-08	Deactivate
Sally StandardUser	2018-11-08	2018-11-08	Deactivate
[Redacted]	2018-11-08	2018-11-08	Deactivate
Joe Manager	2018-11-08	2018-11-08	Deactivate

**User Deactivation**  
This action is irreversible. Are you certain you would like to continue?  
Cancel Continue

### WARNING

Remember that if your organization does not have an active Manager **no new accounts can be approved, and all users will ultimately lose access during the next recertification period.** If you are moving on to a new position, make sure that someone else at your organization applies for Manager-level access. **Once the new Manager is approved, you will lose your Manager privileges.**

When a new SQUARES Manager is approved, the previous Manager will still be in the system as a Standard User. The new Manager may deactivate the previous Manager in the Users tab.