

# Understanding the Assessor Registry



**Knowledge Base Article**

# Understanding the Assessor Registry

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# Understanding the Assessor Registry

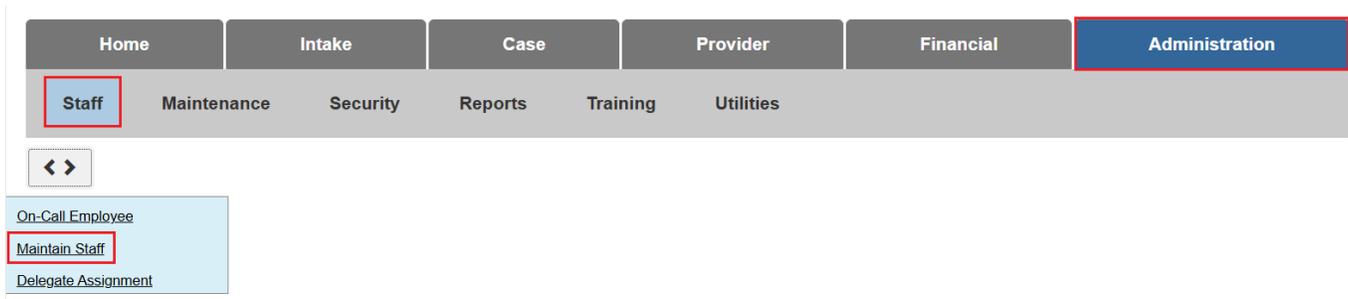
## Overview

The Assessor Registry was designed to maintain the database of qualified adoption assessors in Ohio SACWIS. Each PCSA, PCPA and PNA is to select two employees, at minimum, who will have access to add or edit information in the Assessor Registry. To request access, contact the DCY Customer Care Center. There are two security user groups that provide this access:

- Staff Administrator
- Private Agency -Security Admin

## Entering Assessor Information:

1. Go to the **Administration** Tab.
2. Select **Staff** in the Subsection.
3. Select **Maintain Staff** in the Blue Navigation bar on the left.



4. Enter the **Employee ID** or the **Last Name, First Name** in the **Employee Search Criteria**.
5. Click **Search**.

# Understanding the Assessor Registry

Home
Intake
Case
Provider
Financial
Administration

Staff
Maintenance
Security
Reports
Training
Utilities

< >

On-Call Employee
▶ Maintain Staff
Delegate Assignment

Employee Search Criteria

Employee ID:

~ OR ~

Last Name:

First Name:

Middle Name:

County:

Language Proficiency:

Education Level:

Include Inactive

Name Match Precision  
Returns results matching entered names including AKA names/nicknames

+  
AKA/Nicknames

Fewer Results More Results

Sort by:

Search

Clear Form

6. Search results will populate.
7. Click the **edit** link for the selected employee.
  - a. If multiple employee matches are found, click on the edit links and identify the employee that matches with the agency/supervisor, training dates, or other information listed on the DCY 01680.
  - b. If no employee match is found, the PCSA, PCPA, PNA or entity entering this assessor information is to add the employee as staff in SACWIS, as outlined in the Knowledge Base Article, [Adding an Agency Employee to Ohio SACWIS](#)

Search Results

Result(s) 61 to 75 of 144 / Page 5 of 10

	Employee Name / ID	Email	Work Number	State / County	Supervisor	Unit
<a href="#">edit</a>	Test, Employee / 1234			/ Test	Test, Sup	Administrative
Managed Units:						

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Maintain Staff screen will display, with tabs across the top; defaulting to the Basics tab.

8. Select the **Qualifications** tab.

Administration»Staff»Maintain Staff

Basic	Job History	BCI	Demographics	Qualifications
Employee Name: <a href="#">Test Employee</a>		Employee ID: 1234		
<b>Employee Information</b>				
Employee ID (County):	<input type="text"/>	Email Address:	<input type="text"/>	
Hire Date: *	<input type="text" value="06/05/2024"/> 	<input type="checkbox"/> Termination		
Termination Date:	<input type="text"/> 	<input type="checkbox"/> Supervisor Over-Ride		
<input type="checkbox"/> On Leave Indicator				

## Understanding the Assessor Registry

- Click the **Add Assessor Registration** button; when selected, you will be routed to the Assessor screen.

**Note:** If information has already been entered, an **edit** link will appear next to the Add Assessor Registration button.

Administration»Staff»Maintain Staff

Basic	Job History	BCI	Demographics	Qualifications		
Employee Name: <a href="#">Test Employee</a>		Employee ID: 1234				
<b>Professional Licenses</b>						
Name	Number	Type	Start Date	End Date	Suspended	Revoked
<a href="#">Add License</a>						
<b>Assessor Registration</b>						
Assessor Start Date			Assessor Status Expiration Date			
<a href="#">Add Assessor Registration</a>						

### Assessor Screen

The Assessor screen is broken down into sections: **General Information**, **Training Details**, **Assessor Status Information**, **Comments** and **Other Information**.

# Understanding the Assessor Registry

Administration » Staff » Maintain Staff

### General Information

Assessor Name: Test10, User    Personal Phone #:     Personal Email:     Employee ID:

Start Date	Phone #	Email	Agency	Supervisor	Supervisor Phone #
01/01/2015			Ohio Department of Job and Family Services		

### Training Details

Status:     Tier 1 Completion Date:     Tier 2 Extension Approval:

Tier 2 Completion Date:

Training Hours	Training Completion Date
Training Hours: <input type="text"/>	Training Completion Date: <input type="text"/> <a href="#">Add Training</a>

### Assessor Status Information

Assessor Start Date	Assessor Status Expiration Date
Assessor Start Date: <input type="text"/>	Assessor Status Expiration Date: <input type="text"/> <a href="#">Add Status</a>

### Comments

Comments:

[Spell Check](#) [Clear](#)

### Other Information

JFS 1680 Verification Letter Sent	Assessor Available for Contract:
JFS 1680 Verification Letter Sent: <input type="text"/> <a href="#">Add Letter Sent</a>	Assessor Available for Contract: <input type="text"/>
	Assessor Availability Comments: <input type="text"/>
	<a href="#">Spell Check</a> <a href="#">Clear</a> <input type="text" value="300"/>
	Available Counties: <input type="text"/> Add
	Selected Counties: <input type="text"/> Remove
	Adams
	Allen
	Ashland
	Ashtabula
	Athens
	Auglaize
	Belmont
	Brown

[Apply](#) [Save](#) [Cancel](#)

## Assessor Screen – General Information Section

1. General Information will display in the section heading.
2. The Assessor Name will be prepopulated (as view only).

## Understanding the Assessor Registry

3. A personal phone number and email address can be added to the assessor information – this information should be the email address or phone number the assessor would like to be contacted at regarding their assessor status or contracting inquiries.
  - a. This section will also list all active SACWIS employment records for the Assessor. Each job will display the employee’s start date, phone & email, Agency, Supervisor, and the Supervisor’s phone number.

Administration » Staff » Maintain Staff

**General Information**

Assessor Name: Test10, User      Personal Phone #:       Personal Email:       Employee ID:

Start Date	Phone #	Email	Agency	Supervisor	Supervisor Phone #
01/01/2015			Ohio Department of Job and Family Services		

### Assessor Screen – Training Details Section

4. The Training Details section contains the Assessors Status, and Tier 1 and Tier 2 completion dates.
  - o Available Statuses are: Civil Service Employee, Professional Counselor or Student.
5. For Tiered training, enter Tier 1 or Tier 2 completion dates from the DCY 01680.
  - a. Tier 2 Extension Approval should remain blank unless a Tier 2 Extension was approved – only then should the value of ‘yes’ be selected.
  - b. Tier 1 or Tier 2 completion dates cannot be future dated. oTier 2 completion date cannot be recorded without the Tier 1 date first being recorded.
  - c. Once a Tier 1 or Tier 2 completion date has been entered the date cannot be removed, it can only be changed to a different date.
6. For Assessor Series training, add the completion date of the initial Series course into the Tier 1 Completion Date box and add the completion date of the entire Series into the Tier 2 Completion Date box.
7. For continuous or refresher training select 6 or 12 from the Training Hours Drop-down and then click Add Training – a new record should be added for each new set of training hours.
8. If a training is entered incorrectly the record can be deleted by using the trash can icon and then reentered.

**Training Details**

Status:       Tier 1 Completion Date:       Tier 2 Extension Approval:

Tier 2 Completion Date:

Training Hours	Training Completion Date
Training Hours: <input type="text"/>	Training Completion Date: <input type="text"/>

Add Training

### Assessor Screen – Assessor Status Information Section

9. Once a Tier 1/Initial Series course date has been recorded, the assessor may have a start date added to begin assessor duties, while under the supervision off an active status assessor.
10. Once a Tier 2/Series completion date has been recorded, the assessor may have a start date added to begin assessor duties, without the supervision of an active status assessor.

## Understanding the Assessor Registry

11. An End Date is to be added when the Assessor terminates employment/contract or is no longer qualified to complete work as an Active Assessor.
12. Multiple status records can be added to accurately document the dates the Assessor is active.
  - a. Dates cannot be future dated, nor can any status record overlap another.

Assessor Status Information

Assessor Start Date:

Assessor Status Expiration Date:

### Assessor Screen – Comments Section

13. The Comments field can be used to document information regarding this assessor (status, training, etc.)

Comments

Comments:

### Assessor Screen – Other Information Section - JFS 1680 Verification Letter Sent

14. DCY 01680 Verification Letters are not required to be sent or have a date entered. Proof of active assessor status is the completed and signed DCY 01680, with a copy to be kept in the agency's assessor personnel record and with the assessor.

Other Information

JFS 1680 Verification Letter Sent:

Assessor Available for Contract:

Assessor Availability Comments:

Available Counties:  Add

Adams  
Allen  
Ashland  
Ashtabula  
Athens  
Auglaize  
Belmont  
Brown

Selected Counties:  Remove

## Understanding the Assessor Registry

### Assessor Screen – Other Information Section -Assessor Available for Comment

The Assessor Available for Contract section allows an Assessor to provide information regarding their availability to contract for other agencies.

15. To mark an Assessor as Available for Contract select **Yes** in the drop down.
16. The **Comments** field should be used to provide any useful information to agencies looking for assessors to contract. (**Note:** If comments are recorded the Assessor Available for Contract drop-down must have a value selected)
17. The **Available Counties** pusher box should be used to select Counties the assessor is available to contract in. (**Note:** If Assessor Available for Contract is Yes then at least one County must be selected)

The screenshot shows the 'Other Information' section of the Assessor Registry. It features a 'JFS 1680 Verification Letter Sent' section with a text input and an 'Add Letter Sent' button. The 'Assessor Available for Contract' section has a dropdown menu. Below it is a large text area for 'Assessor Availability Comments' with 'Spell Check' and 'Clear' buttons. The 'Available Counties' section is a list with an 'Add' button, and the 'Selected Counties' section is an empty list with a 'Remove' button. At the bottom are 'Apply', 'Save', and 'Cancel' buttons. Red arrows point to the dropdown menu and the 'Add' button in the counties list.

### Assessor Registry Report

The Assessor Registry Report is accessed through Administration > Reports. This report can be generated by any user with Administration Access that is from public or private agency and is generated in Excel.

This report lists all individuals registered as an assessor who are employed, appointed by, or under contract with a court, public children services agency, private child placing agency, or private non-custodial agency and meet the requirements of an assessor.

1. From Home Screen in Ohio SACWIS, User clicks on **Administration**, then clicks on **Reports**.
2. Locate, **Assessor Registry Reports**.

# Understanding the Assessor Registry

**Report Filter Criteria**

Report Category: Administration Report Type: Agency

**Filter**

**Reports**

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Title	Category	Type
<a href="#">AFCARS Exception Summary Report</a>	Administration	Agency
<a href="#">AWOL Report</a>	Administration	Agency
<a href="#">Activity Log Audit Report</a>	Administration	Agency
<a href="#">Adoption Finalization Report</a>	Administration	Agency
<a href="#">Agency Safety Plan Contacts Report</a>	Administration	Agency
<a href="#">Agency Safety Plan Report</a>	Administration	Agency
<a href="#">Agency Temporary License Report</a>	Administration	Agency
<a href="#">Assessor Registry Report</a>	Administration	Agency
<a href="#">Bridges Comprehensive Report</a>	Administration	Agency

The Reports screen displays.

### 3. User selects **Generate Report**.

Administration » Reports

**Report Details**

Report Category: ADMINISTRATION Report Title: Assessor Registry Report

Report Type: AGENCY

**Report History**

ID	Date Created	Employee ID	Name
----	--------------	-------------	------

**Document History**

**Generate Report**

- On parameter page of the Assessor Registry, the user selects **single** or **multiple counties**, or **Statewide**, then clicks **Add**. The counties selected move into the Selected box.
- User selects **Generate Report** for report.



# Understanding the Assessor Registry

Filter (Ctrl+Shift+L)  
Turn on filtering for the selected cells.  
Then, click the arrow in the column header to narrow down the data.

Current Agency	Name	Phone #	Email	Assessor Start Date	Assessor End Date	Tier 1 Completion Date	Tier 2 Completion Date	Six (6) Hour Training Completion Date	12 Hour Training Completion Date	Available For Contract/ Hire	Courties Available to Work In	Comments
Standard County Department of Job and Family Services		(513) 553-1390		09/03/2016	09/03/2016	09/03/2016	10/03/2016	09/14/2019	11/08/2017			
The Twelve of Ohio, Inc.		(330) 837-3555		04/27/2012	04/27/2012	04/27/2012	09/26/2013	09/26/2013	11/30/2018			
Clark County Department of Job and Family Services		(833) 327-7860		06/25/2019	06/25/2019	06/25/2019	10/01/2019					
Champaign County Department of Job and Family Services		(937) 327-3883		06/25/2019	06/25/2019	06/25/2019	10/01/2019					
Hamilton County Department of Job and Family Services		(513) 946-2262		08/07/2014	08/07/2014	08/07/2014						
Lucas County Children Services		(419) 726-5300		09/12/2012	09/12/2012	09/12/2012	05/17/2013	04/03/2016				
Standard County Department of Job and Family Services		(419) 726-5300		09/12/2012	09/12/2012	09/12/2012	05/17/2013	04/03/2016				
Adopt America Network		(419) 726-5300		09/12/2012	09/12/2012	09/12/2012	05/17/2013	04/03/2016				
Franklin County Children Services Board		(614) 223-7047		05/30/2003	05/30/2003	02/24/2004	03/16/2019					

8. Filters will appear on top right side of each column name. Then user can click on the filter button to sort or filter columns for specific information.

Current Agency	Name	Phone #	Email	Assessor Start Date	Assessor End Date	Tier 1 Completion Date	Tier 2 Completion Date	Six (6) Hour Training Completion Date	12 Hour Training Completion Date	Available For Contract/ Hire	Courties Available to Work In	Comments
Standard County Department of Job and Family Services		(513) 553-1390		09/03/2016	09/03/2016	09/03/2016	10/03/2016	09/14/2019	11/08/2017			
The Twelve of Ohio, Inc.		(330) 837-3555		04/27/2012	04/27/2012	04/27/2012	09/26/2013	09/26/2013	11/30/2018			
Clark County Department of Job and Family Services		(833) 327-7860		06/25/2019	06/25/2019	06/25/2019	10/01/2019					
Champaign County Department of Job and Family Services		(937) 327-3883		06/25/2019	06/25/2019	06/25/2019	10/01/2019					
Hamilton County Department of Job and Family Services		(513) 946-2262		08/07/2014	08/07/2014	08/07/2014						
Lucas County Children Services		(419) 726-5300		09/12/2012	09/12/2012	09/12/2012	05/17/2013	04/03/2016				
Standard County Department of Job and Family Services		(419) 726-5300		09/12/2012	09/12/2012	09/12/2012	05/17/2013	04/03/2016				
Adopt America Network		(419) 726-5300		09/12/2012	09/12/2012	09/12/2012	05/17/2013	04/03/2016				
Franklin County Children Services Board		(614) 223-7047		05/30/2003	05/30/2003	02/24/2004	03/16/2019					

If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).