

# Reconciling Users in Ohio SACWIS



**Knowledge Base Article**

# Reconciling Users in Ohio SACWIS

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# Reconciling Users in Ohio SACWIS

## Overview

This article describes the steps needed to complete a review of Ohio SACWIS users for an agency. We are federally mandated to ensure the highly sensitive and confidential information contained within Ohio SACWIS is accessible only to those who need it. On a biannual basis, the Bureau of Automated Systems will request your partnership to review Ohio SACWIS User Access for each user in your agency.

## Generating the SACWIS User Report

The first step in the process is to run the Ohio **SACWIS User** Report.

1. Click on the **Administration** tab.
2. Click on the **Reports** sub-tab.
3. Select the **Report Category** of **Administration**, then click the **Filter** button.
4. Select the Ohio **SACWIS User** Report.

The screenshot shows the Ohio SACWIS Administration interface. The top navigation bar includes tabs for Home, Intake, Case, Provider, Financial, and Administration (highlighted). Below this is a sub-tab bar with Staff, Maintenance, Reports (highlighted), Training, and Utilities. The 'Report Filter Criteria' section shows 'Report Category' set to 'Administration' and 'Report Type' as a dropdown menu. A 'Filter' button is highlighted. Below the filter is a 'Reports' section showing 'Result(s) 51 to 63 of 63 / Page 3 of 3'. A table lists reports with columns for Title, Category, and Type. The 'SACWIS User Report' is highlighted in the table.

Title	Category	Type
<a href="#">SACWIS Employee User Group Report</a>	Administration	Agency
<a href="#">SACWIS User Password Reset Report *</a>	Administration	Agency
<a href="#">SACWIS User Report</a>	Administration	Agency
<a href="#">Screening Decision Timeliness Report</a>	Administration	Agency

The **Report Details** page appears.

5. Choose the report format by clicking the radio button next to **PDF** or **Excel**.
6. Click the **Generate Report** button.

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Administration»Reports

### Report Details

Report Category: ADMINISTRATION      Report Title: SACWIS User Report  
Report Type: AGENCY

### Report History

ID	Date Created	Employee ID	Name
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### Document History

Select Report Output Format

PDF  
 Excel

**Generate Report**

The **SACWIS User Report** screen appears.

7. Select **Agency Type** from the drop-down.
8. Highlight the agency in the **Available** push box, then click **Add** to send it to the **Selected** push box.
9. Click the **Generate Report** button.

### SACWIS User Report

Agency Type

Agency: \*

**Available:**

Search:     Add All    Add

Test County Children Services Board

**Selected: \***

Remove    Remove All    Search:

**Generate Report**    Cancel

## Reconciling Users in Ohio SACWIS

The **SACWIS User Report** generates with the following information for each employee of the agency selected:

- Agency
- Infosec ID
- Employee Name
- Employee ID
- Employee Email Address
- Current/Most Recent Access Start Date
- Current/Most Recent Access End Date
- Job Title
- Current/Most Recent Job Start Date
- Current/Most Recent Job End Date
- Hire Date
- Termination Date
- Last Accessed Date
- On Leave Indicator

### User Access Reconciliation

Review the generated report and complete the appropriate action below for each user in your agency:

1. If the user is still employed in the agency, but no longer needs access to Ohio SACWIS, you will need to record an end date for the employee's job and end date their employment in the Ohio SACWIS system. In addition, you will need to email your Technical Point of Contact (TPOC) informing them that the user will no longer need access to Ohio SACWIS and have the role removed.
  - a. Click on the **Administration** tab.
  - b. Click the **Staff** sub-tab.
  - c. Click on the **Maintain Staff** hyperlink in the left-hand navigation bar.
  - d. Enter the **Employee ID** or search by **Last Name** and **First Name**.
  - e. Click **Search**.
  - f. Click **edit** next to the name of the employee you wish to modify.

# Reconciling Users in Ohio SACWIS

Administration

Staff

Maintain Staff

Employee Search Criteria

Employee ID:  - OR - Last Name: administrator First Name: aubrey Middle Name:

County:  Language Proficiency:

Education Level:

Include Inactive

Name Match Precision: Returns results matching entered names including AKA names/aliases

Sort by: Relevance (Highest-Lowest)

Search Results

Result(s) 1 to 1 of 1 / Page 1 of 1

	Employee Name / ID	Email	Work Number	State / County	Supervisor	Unit
<a href="#">edit</a>	Administrator, Aubrey / 489t		555-555-5555	/: Ohio	Supervisor, Sara	Licensing

Managed Units:

The **Maintain Staff** page appears.

g. Click on the edit hyperlink next to the Current Job.

Administration>Staff>Maintain Staff

Employee Name: Administrator, Aubrey Employee ID: 489t

Employee Information

Employee ID (County):  Email Address:

Hire Date: \*   Termination:  Termination Date:

On Leave Indicator  Supervisor Over-Ride

Exemptions

University Partnership Program  First Year Requirement Waived

Current Job

	Start Date	End Date	County	Agency	Unit	Supervisor	Job Title
<a href="#">edit</a>	01/01/2000		Ohio	A County Child Welfare Agency	Licensing	Supervisor, Sara	Supervisor

The **Maintain Staff** page appears.

h. Enter an **End Date** for the position.

i. Click **Save**.

# Reconciling Users in Ohio SACWIS

Administration > Staff > Maintain Staff

Employee Name: Administrator, Aubrey Employee ID: 489657

**Job Details**

Start Date: 01/01/2000 End Date:

County: Ohio Agency: A County Child Welfare Agency

Unit: Licensing Supervisor: \* Supervisor, Sara

Job Title: Supervisor

**Agency Information**

Street: 100 Main Street

City: Anywhere, OH

Zip Code: 44000

2. If the user is no longer employed at the agency and needs all access revoked, you will need to follow the termination process by contacting your Technical Point of Contact (TPOC).
  - a. Follow the steps a. through i. above.
  - b. When returned to the **Maintain Staff** main page, click on the **Termination** box.
  - c. Enter the **Termination Date**.
  - d. Click **Save**.

**Employee Information**

Employee ID (County):  Email Address:

Hire Date: \* 02/10/2020

Termination Termination Date:

On Leave Indicator  Supervisor Over-Ride

**Exemptions**

University Partnership Program  First Year Requirement Waived

3. If the user's information is accurate, no further action is needed.

## Troubleshooting

In the instance where validation messages are encountered when attempting to terminate an employee record, please follow the applicable step below:

### Terminating a Supervisor in Ohio SACWIS

If you attempt to terminate the employment record of a supervisor who has individuals listed as current employees under them, the system will display a validation message. The following steps should be followed to avoid this. You may want to screen shot or write down the list of names that appear in this validation to ensure you complete this step for each person.

## Reconciling Users in Ohio SACWIS

1. Navigate to the **Maintain Staff** page as directed above.
2. Enter in the employee name of the individual who will require a new supervisor.
3. Click **Search**.
4. Select **edit** next to the employee's name to modify.
5. Click **edit** on their **Current Job** entry.
6. On Job Details page, navigate to supervisor drop down and make an alternate selection.
7. Click Save
8. Repeat this process for each employee who reports to the supervisor being terminated.

Administration>Staff>Maintain Staff

Employee Name: Administrator, Aubrey Employee ID: 48

Job Details			
Start Date:	03/30/2007	End Date:	<input type="text"/>
County:	Ohio	Agency:	A County Child Welfare Agency
Unit:	Licensing	Supervisor: *	<div style="border: 1px solid red; padding: 2px;"><div style="border: 1px solid gray; padding: 2px;">Supervisor, Sara <input type="button" value="v"/></div><div style="border: 1px solid gray; padding: 2px;">Please Select a Supervisor</div><div style="border: 1px solid gray; padding: 2px;">Administrator, Aubrey</div><div style="border: 1px solid gray; padding: 2px; background-color: #e0e0e0;">Supervisor, Sara</div></div>
Job Title:	Supervisor		
Agency Information			
Street:	100 Main Street		
City:	Anywhere, OH		
Zip Code:	44000		

### Assigning a Different Worker to a Case

If an employee being terminated is the only individual assigned to a Case record, the system will present a validation message stating that only they have an active assignment to the case. To correct this validation, follow these steps after taking a screen shot or writing down the names of the Case/Case ID that need reassignment:

1. Navigate to the **Home** tab.
2. Click on the **Assignments** sub-tab.
3. Click the plus button next to the Employee's name to display their workload.
4. Check the box next to the case which needs reassignment.
5. Click **Assign** at the bottom of the screen.

# Reconciling Users in Ohio SACWIS

Home Intake Case Provider Financial Administration

Alerts Action Items Approvals **Assignments**

Work Assignments

Assignments for:

# Administrator Aubrey (489) 1 Case Assignments, 2 Provider Assignments, 0

# Caseworker Caden (883) 0 Case Assignments, 9 Provider Assignments, 9

# Caseworker Campy (282) 1 Case Assignments, 9 Provider Assignments, 1

# Caseworker Carol (84) 1 Case Assignments, 3 Provider Assignments, 0

Donald Duck (Case ID: 15026 ; Case Category: Ongoing) (IL Worker, PlacementWorker, Worker) edit

Geographical Designation: None Address: 10 Duckling Way, Anytown, OH 44300

Caseworker, Casey (Worker)

Assign by Geographical Designation

The list of employees will appear.

- Choose **Select** next to the employee you wish to assign.

Assign Work Item

Agency:

Employees

	Employee ID	Employee Name	Roles
<input checked="" type="checkbox"/>	121212	Test, Worker	Activity Log Mover, Adoption Worker, Assessment/Investigation Supervisor, Assessment/Investigation Worker, Assessor/Investigator, Case Linker, Case Merge Administrator, Case Reviewer, Clerical Staff, Court Worker, Eligibility Specialist, Eligibility Supervisor, Home Study Assessor, Home Study Supervisor, ICAMA Supervisor, ICAMA Worker, ICPC Supervisor, ICPC Worker, IL Worker, KPIP Fiscal Worker, KPIP Specialist, KPIP Specialist Supervisor, PlacementWorker, Primary Worker, Provider Worker, QRTP Assessment Other Worker, QRTP Assessment Placement Worker, Reimburseability Specialist, Report Disposition Changer, Screener, Screening Decision Maker, Supervisor, Transfer Administrator, Unlinker, Worker, WWK Worker

The Employee Assignment page appears.

- Select **Roles** of the newly assigned individual by placing a check next to each box for the corresponding job title.
- Click **Save** at the bottom of the page.

Home Intake Case Provider Financial Administration

Employee Name: Test, Caseworker

Employee ID: 121212

Employee Assignment

Start Date:  End Date:

Work Items

Work Item Type	Work Item ID	Work Item Reference
Provider	1234	<input type="button" value="remove"/>

Roles

Select	Role
<input type="checkbox"/>	Activity Log Mover
<input type="checkbox"/>	Adoption Worker
<input type="checkbox"/>	Assessment/Investigation Supervisor
<input type="checkbox"/>	Assessment/Investigation Worker

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End My Assignment(s)  
 End My and My Subordinates' Assignments

Comments:

Spell Check Clear 200

Save Cancel

- 9. Return to the Work Assignments page.
- 10. Click edit button next to person's assignment to the case.

**Work Assignments**

Assignments for: Self Show

- [Administrator, Aubrey \(489\)](#) - Case Assignments: 2; Provider Assignments: 0
- [Caseworker, Caden \(883\)](#) - Case Assignments: 9; Provider Assignments: 9
- [Caseworker, Candy \(282\)](#) - Case Assignments: 0; Provider Assignments: 1
- [Caseworker, Carol \(84\)](#) - Case Assignments: 3; Provider Assignments: 0

[Donald, Duck](#) (Case ID: 1502657; Case Category: Ongoing) [IL Worker, PlacementWorker, Worker] edit

Geographical Designation: None    Address: 10 Duckling Way, Anytown, OH 44300

Caseworker, Casey [Worker]

Assign Assign by Geographical Designation

The Employee Assignment page appears.

- 11. Enter an End Date: in the box.
- 12. Click **Save**.
- 13. Repeat this process for each Case needing reassignment, first assigning a new individual, then ending the assignment of the employee being terminated.

Home	Intake	Case	Provider	Financial	Administration
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Employee Name: Test, Caseworker  
Employee ID: 121212

**Employee Assignment**

Start Date:

End Date:

**Work Items**

Work Item Type	Work Item ID	Work Item Reference	
Case	1234		<a href="#">remove</a>

Save Cancel

## Reconciling Users in Ohio SACWIS

### Changing a Case or Provider Activity Log from Draft to Completed

If an employee being terminated has Draft activity logs on a Case or Provider ID, the system will present a validation message stating that these must first be placed in Completed status prior to Employee termination.

If the worker has already left the agency, to correct this error for Case activity logs, you must be the assigned supervisor of the worker being terminated or assigned to the case. Write down the Case Name/IDs from the validation message or take a screen shot, then follow these steps:

1. Navigate to the Case or Provider ID where the Draft activity log is located.
2. Select the **Activity Log** left hand navigation link.
3. Click on **edit** next to the activity log in Draft status.
4. Choose **Completed** in the **Activity State** field.
5. Click **Save**.
6. Repeat this process for each Case or Provider ID containing Draft activity logs composed by the employee being terminated. If edit access is not available to anyone and the logs cannot be completed within your agency, follow the steps below to request a data fix.

If there are draft Provider Activity Logs remaining for the terminated individual and they can no longer access the system, your agency's Ohio SACWIS liaison must contact the Automated Systems Help Desk and request a data fix to place the provider activity logs from Draft to Completed status. Please include the Employee ID of the individual who was terminated and all the Provider Names/ID (or Case Names/ID) where the draft activity logs are located.

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