

Understanding the Assessor Registry



Knowledge Base Article

Understanding the Assessor Registry

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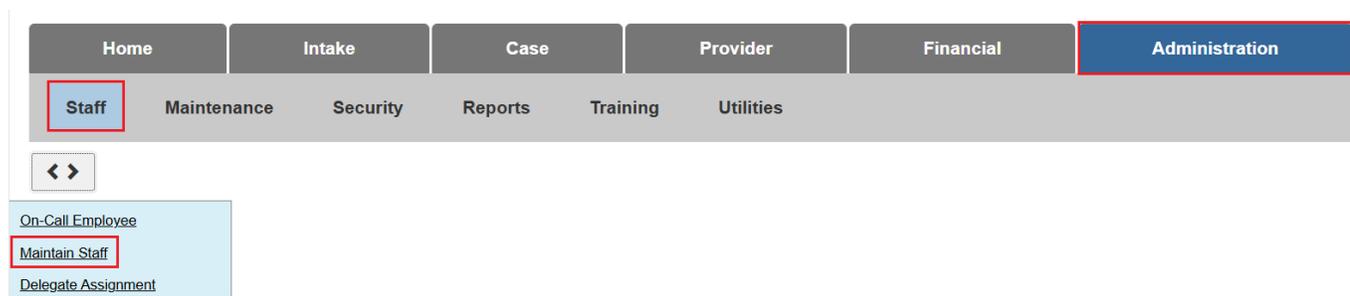
Overview

The Assessor Registry was designed to manage the assessor database in Ohio SACWIS. There are two security user groups associated with the Assessor Registry. Users with Staff Administrator or Private Agency-Security Admin user groups will be able to add or edit information within the Qualifications Tab specific to the Assessor Registry.

Add Assessor Registration Information

Assessor Registration Section

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**.

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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

Sort by:

Fewer Results More Results

6. Search results will populate.
7. Click the **edit** link for the selected employee.

Search Results

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

	Employee Name / ID	Email	Work Number	State / County	Supervisor	Unit
edit	Test, Employee / 1234			/ Test	Test, Sup	Administrative
Managed Units:						

The Maintain Staff screen displays, defaulting to the Basics tab.

8. Select the **Qualifications** tab.

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Administration»Staff»Maintain Staff

Basic	Job History	BCI	Demographics	Qualifications
Employee Name: <u>Test_Employee</u>		Employee ID: 1234		
Employee Information				
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				

9. 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: <u>Test_Employee</u>		Employee ID: 1234					
Professional Licenses							
Name	Number	Type	Start Date	End Date	Suspended	Revoked	
<input type="button" value="Add License"/>							
Assessor Registration							
Assessor Start Date				Assessor Status Expiration Date			
<input type="button" value="Add Assessor Registration"/>							

Assessor Screen

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

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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"/> <input type="button" value="Add Training"/>

Assessor Status information

Assessor Start Date	Assessor Status Expiration Date
Assessor Start Date: <input type="text"/>	Assessor Status Expiration Date: <input type="text"/> <input type="button" value="Add Status"/>

Comments

Comments:

Other Information

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

Assessor Screen – General Information Section

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

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12. 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 regarding their assessor status or contracting inquiries. ○ 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.

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

Assessor Screen – Training Details Section

13. The Training Details section contains the Assessors Status, and Tier 1 and Tier 2 completion dates. ○ Available Statuses are: Civil Service Employee, Professional Counselor or Student.
- Tier 2 Extension Approval should remain blank unless a Tier 2 Extension was approved – only then should the value of ‘yes’ be selected.
 - Tier 1 or Tier 2 completion dates cannot be future dated. ○ Tier 2 completion date cannot be recorded without the Tier 1 date first being recorded.
 - 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.
14. Training hours can be recorded by selecting 6 or 12 from the Training Hours Drop-down and then clicking Add Training – a new record should be added for each new set of training hours.
15. If a training is entered incorrectly the record can be deleted by using the trash can icon and then reentered.

Training Hours	Training Completion Date
6	

Assessor Screen – Assessor Status Information Section

16. Once at least a Tier 1 date has been recorded, click **Add Status**.
17. The Start Date should be the date the Assessor is first available to complete work as an Active Assessor.

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18. An End Date can be added when the Assessor terminates employment or is no longer completing work as an Active Assessor.
19. Multiple status records can be added to accurately document the dates the Assessor is active.
 - Dates cannot be future dated nor can any status record overlap another.

Assessor Status Information

Assessor Start Date

Assessor Status Expiration Date

Assessor Start Date:

Assessor Status Expiration Date:

[Add Status](#)

Assessor Screen – Comments Section

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

Comments

Comments:

[Spell Check](#) [Clear](#) [3000](#)

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

21. State Registry Staff are responsible for adding the JFS 1680 Verification Letter Sent. **This information should not be recorded by Staff Administrators or Private Agency – Security Admins.**

Other Information

JFS 1680 Verification Letter Sent

JFS 1680 Verification Letter Sent: [Add Letter Sent](#)

Assessor Available for Contract:

Assessor Availability Comments:

[Spell Check](#) [Clear](#) [3000](#)

Available Counties:

Available Counties	Add
Adams	
Allen	
Ashland	
Ashtabula	
Athens	
Auglaize	
Belmont	
Brown	

Selected Counties:

[Remove](#)

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

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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.

22. To mark an Assessor as Available for Contract select **Yes** in the drop down.
23. 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)
24. 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' field with an 'Add Letter Sent' button. The 'Assessor Available for Contract' dropdown is set to 'Yes'. The 'Assessor Availability Comments' field is empty. The 'Available Counties' list includes Adair, Allen, Ashland, Ashtabula, Athens, Auglaize, Belmont, and Brown. The 'Selected Counties' field is empty. Arrows point to the dropdown, the comments field, and the 'Adair' county in the list. At the bottom are 'Apply', 'Save', and 'Cancel' buttons.

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 noncustodial 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**.

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Home Intake Case Provider Financial Administration

Staff Maintenance Security Reports Training Utilities

Report Filter Criteria

Report Category: Administration Report Type: Agency

Filter

Reports

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	Title	Category	Type
	AFCARS Exception Summary Report	Administration	Agency
	AWOL Report	Administration	Agency
	Activity Log/Audit Report	Administration	Agency
	Adoption Finalization Report	Administration	Agency
	Agency Safety Plan Contacts Report	Administration	Agency
	Agency Safety Plan Report	Administration	Agency
	Agency Temporary License Report	Administration	Agency
	Assessor Registry Report	Administration	Agency
	Bridges Comprehensive Report	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

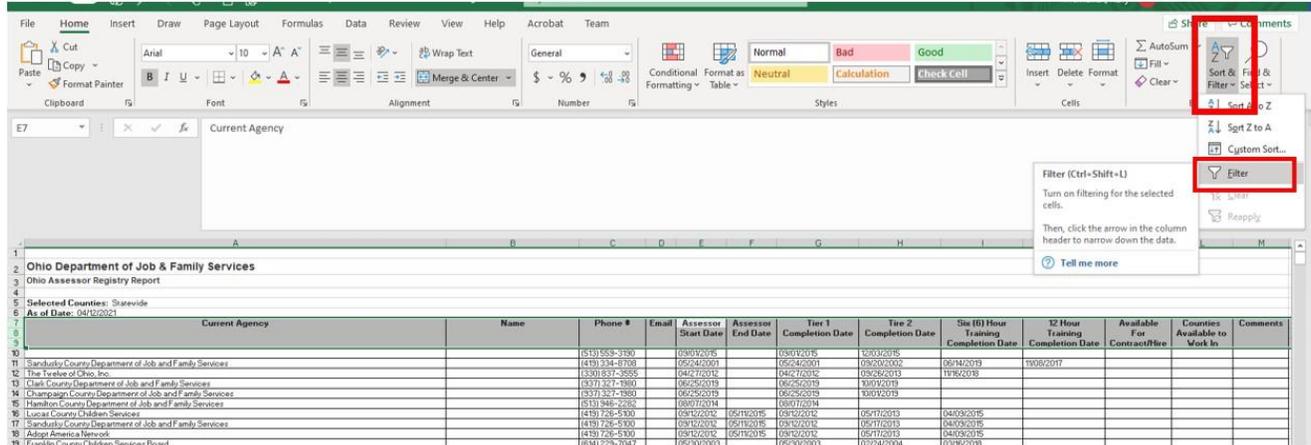
ID	Date Created	Employee ID	Name
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Document History

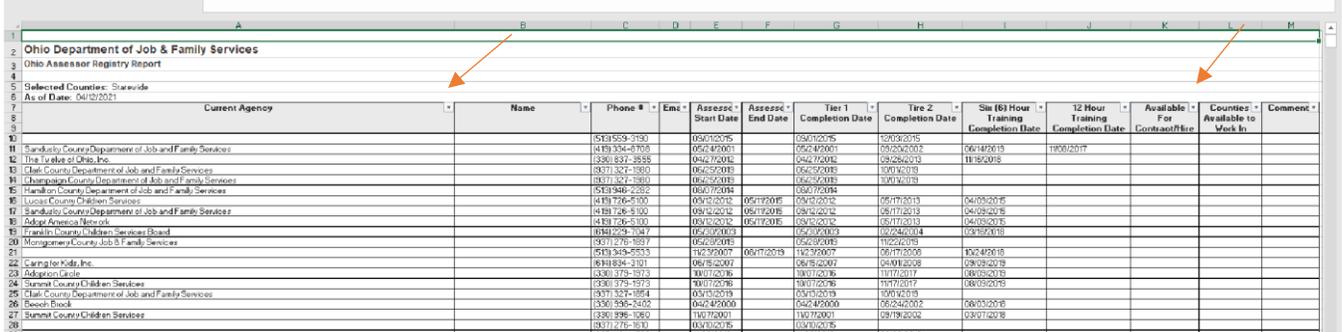
Generate Report

- 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.

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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.



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