



**Private Agency Phase II
SACWIS Super User Training**

Ohio

**Department of
Job and Family Services**

Super User Training Agenda

9:00 – 9:30	Housekeeping / Introductions
9:30 – 10:00	Super User Roles / Responsibilities
10:00 – 10:30	Overview of Admin / User Access / Maintain Staff
10:30 – 10:45	Morning Break
10:45 – 11:15	Unit & Supervisor/ Broadcast Messages
11:15 – 12:00	Security User Groups/Profiles
12:00 – 1:00	Lunch
1:00 – 1:30	Overview of SACWIS Knowledge Base
1:30 – 2:30	Trouble Shooting & Problem Tickets
2:30 – 2:45	Afternoon Break
2:45 – 3:15	Admin Reports
3:15 – 4:00	Practice / Questions / Wrap-Up

Private Agency Rollout: Super Users

What is a Super User?

Super Users are SACWIS end users who have a clear understanding of their agency's business practices and also have strong technical skills.

In addition to their normal job role, Super Users will also function in a leading role across the agency to support others in using the SACWIS application.

Why Are Super Users Important?

Super Users serve a crucial role during the SACWIS rollout process by providing user support and acting as a liaison between their agency and the state. They begin by assisting with pre-implementation tasks, such as facilitating the set-up of user access/security, data cleanup activities, and attending end-user training.

Once the agency is "live" in SACWIS, the Super User will continue to support the users in the agency by remaining current on functionality changes/updates, answering functionality questions, troubleshooting system problems, and continuing to serve as a liaison between the agency and the SACWIS Team.

What Do Super Users Do?

- Develop an above average understanding of the SACWIS application and the agency's SACWIS-related work processes
- Assist end-users with questions related to use of the SACWIS application
- Act as the agency's liaison with the SACWIS Help Desk
- Collaborate with other (public and private agency) super users
- Serve as the internal/external SACWIS Point-of-Contact (POC) for their agency
- Serve as the primary internal support for SACWIS users
- Help users log into the system for the first time
- Assist users with their initial setup of SACWIS
- Coach users on how SACWIS functionality fits into their work flow
- Troubleshoot problems that users may experience by reporting system problems and questions to the SACWIS Help Desk and/or Provider Team
- Develop a feedback loop to follow up with end-users regarding SACWIS problems and questions that were bumped up to the state level
- Collect feedback from users and administrators on their comfort using the application as well as any issues or concerns they may have

Tips for Super Users

- Approach your role in providing user support as hands-on training
- Develop internal processes to integrate SACWIS into your agency's workflow
- Remain informed about SACWIS functionality changes by checking the Innerweb, participating in SACWIS Build release calls, reviewing/sharing the release notes and emails regarding SACWIS
- Use pre-release notes disseminated each release cycle to proactively work with agency staff to plan/prepare for workflow changes necessitated by the introduction of new functionality (or the enhancement of existing functionality)
- Continue to develop your expertise regarding SACWIS and your agency processes and share your expertise with others
- Use the training materials, Knowledge Base Articles, Captivate videos, and Online Help articles as reference tools
- Keep the SACWIS Team and your Agency POC (if role is served by another agency staff) informed of functionality problems and issues
-

Role of the SACWIS Team

The role of the SACWIS Team during rollout is to assist end users, finalize preparations for transition of user support, and transition the responsibility for the application data to the agency. Specifically, the SACWIS team is responsible for:

- Providing user support during the rollout– managing the support initially and then transitioning it to the Super Users
- Training and supporting the Super Users during the planning and implementation stages of the rollout
- Facilitating Super Users preparation sessions (training), coaching and mentoring the Super Users in relation to the application, county workflow, and other available support resources
- Providing technical assistance and additional user supports after the rollout, which may include the following activities:
 - Information sharing (i.e. build release notes)
 - Build release call
 - Weekly touch-point calls
 - Webinars
 - Knowledge base articles
 - On-site visits
 - Continued end-user support (Help Desk, Provider Team Mailboxes)

Ohio Department of Job and Family Services
John R. Kasich, Governor
Cynthia C. Chang, Director



Super Users

What is a Super User?

- A **Super User** is an end-user who develops a high level of SACWIS expertise and helps support others in their use of the SACWIS application.
- It is recommended that Super Users have a clear understanding of their agency's business practices and also have strong technical skills.
- See Super Use Handout

SACWIS Access/Security

- There will be a one-time 'initial load' of all employee records and security access levels into SACWIS.
- **TPL Spreadsheet** – Provides data to load employee records into SACWIS
- **Security Matrix** – Provides data for initial security user group load for employees

Access/Security

- After the initial load of employee records into SACWIS the agency becomes responsible for creating new employee records in SACWIS.
- After the employee record is created, the super user will send an email to the **SACWIS_Access@jfs.ohio.gov** with the Name and Employee Id of the new user and attach a pdf of the completed JFS 7078 form.

New Employee Set Up

- General 3 Step Process
 - Set Up the **New Employee Record**
 - Email **SACWIS_ACCESS@jfs.ohio.gov**
 - Employee Name
 - Employee Id
 - PDF of Completed JFS 7078 form
 - Once the (email) response is received from SACWIS ACCESS with the new employee's User Id, set up the **Security User Groups** for the employee.
- Now you can provide the new user with their 1st time login information. **Note:** They will then need to change their password.

New Employee Set Up

- See handout on **Instructions for Adding a Private Agency Employee to SACWIS**
- Practice creating a new employee record through the **Staff/Maintain Staff** link
- Review the **JFS 7078** form and instructions for completing the form

Logging Into SACWIS

- View Captivate Video : How to Login to SACWIS and Change Your Password
- TIP: When resetting your password the temporary password is sent to the email address that is entered on your **Employee Profile Record**
- Practice logging into SACWIS and changing your password

Unit & Supervisor

- Your agency's Table of Organization is set up in SACWIS by:
 - Establishing agency Units & Supervisors using the **Unit & Supervisor** link under the Administration/Maintenance tab
 - Choosing the correct Supervisor when setting up the **Employee Profile** record.
- **Note:** In order for a Supervisor to be available from the **Supervisor Drop Down List** on the Employee Profile, they must be listed as a Supervisor in the appropriate unit under the **Maintain Unit & Supervisor** link.

Supervisor Delegate

- A **Supervisor Delegate** is someone who a supervisor can delegate the ability to make **assignments** on their behalf.
- Only **Unit Supervisors** can Assign Delegates.
- Anyone with the proper security can be a Supervisor Delegate.
- At least one of the following user groups is required to be a Supervisor Delegate:
 - Private Agency – Home Study Assessor Supervisor
 - Private Agency – Supervisor Delegate

Administrative Tickler Disposal

- Located under **Maintenance** tab
- Provides ability to administratively **dispose** of (or delete) a tickler without completing the associated work item.
- To be used with discretion
- Some Super Users may not have this ability
- Must have the user group **Private Agency – Security Admin** in order to have this ability

Creating a Broadcast Message

- Located under **Maintenance** tab
- Requires **Private Agency – Security Admin** security to access
- Users with proper security can add **Agency Broadcast Messages**
- **State Broadcast Messages** are maintained by the state and cannot be edited by agency workers
- Practice creating a Broadcast Message

Managing Security User Groups

- Located under **Admin/Security** tab
- Requires **Private Agency – Security Admin** security to access
- **State Defined vs Agency Defined** User Groups
- Creating Agency Defined User Groups
- **User Groups** are made up of **Security Profiles**, each allowing access to a certain piece of functionality
- **Agency Defined User Groups** can only contain Security Profiles that are assigned to the **Private Agency – Security Admin** who is creating the new agency defined user group

Assigning Security User Groups

- The **Private Agency – Security Admin** for an agency will be responsible for managing the security levels of agency staff by the assignment of **Security User Groups**.
- User Groups can only be assigned once the employee record is created a **job assignment** is recorded for the employee.
- Go to **Admin/Security/Assign User Groups**
- Search for the employee
- Click **Edit** to Add or Delete user groups
- Practice adding and deleting user groups in SACWIS

Assigning Security User Groups

- Each **Security User Group** is made up of **Security Profiles**, which allow access to certain pieces of the functionality.
- Review the **User Group Description Document**
- **Homework:** Each Agency will need to determine which user groups should be assigned to each staff member. Remember with the Initial Load you will supply a list of user group assignments for each staff member via the security matrix.

Trouble - Shooting

- Assisting co-workers with SACWIS issues is a key function of a Super User
- Strategies for trouble-shooting
 - Walk back through the steps/clicks taken – was a step over looked?
 - Review the related Knowledge Base Article for tips
 - Watch the Captivate Video or Webinar if there is one
 - Consult with another Super User
- When the above strategies do not resolve the issue, you must determine the next step:
 - Email the SACWIS Help Desk with a Problem Ticket
 - Email the Provider Team Mailbox
 - Call the SACWIS Help Desk
 - Call your SACWIS Point of Contact

Trouble – Shooting Continued

- If the issue requires a **data fix** or does not need an immediate resolution, email a **Problem Ticket** to the SACWIS Help Desk and copy the Provider Team Mailbox.
- If it is a question regarding **HOW** to complete a process in SACWIS, email the **Provider Team** mailbox.
- If you need **immediate assistance** in resolving your issue the **SACWIS Help Desk** is available M-F from 8 am – 5 pm.
- Always feel free to contact your **SACWIS point of contact** for assistance. Just remember that your POC may not always be readily available to assist you, but we will do our best!

Trouble – Shooting Continued

- Review the **Ongoing Technical Assistance and Support** handout
- Help Desk Contact Info:
 - Email: **SACWIS_Help_Desk@jfs.ohio.gov**
 - Phone: (800) 686-1580
 - Choose option 3, then option 5
- Provider Team Mailbox
 - Email: **SACWIS_Provider_Team@jfs.gov**
- SACWIS Point of Contact List
 - <http://jfskb.com/sacwis/index.php/privates/165-private-agency-council/553-sacwis-contact-list>

Thank You!

Adding a Private Agency Employee into SACWIS



Knowledge Base Article

Adding a Private Agency Employee into SACWIS

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Adding a Private Agency Employee into SACWIS

Overview

This Knowledge Base Article describes the steps for adding a **Private Agency Employee** into SACWIS.

Navigating to the Employee Information Screen

1. On the SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Staff** tab. The **Navigation** menu appears.



3. Click the **Maintain Staff** link in the **Navigation** menu.

The **Employee Search Criteria** screen appears.

A screenshot of the Employee Search Criteria screen. The top navigation bar is the same as in the previous image, with Administration and Staff tabs circled in red. The Maintain Staff link in the sub-menu is also circled in red. The main content area is titled 'Employee Search Criteria' and contains several input fields: Last Name, First Name, Middle Name, Employee ID, County (dropdown), Education Level (dropdown), and Language Proficiency (dropdown). There are two checkboxes: 'Sounds Like' (unchecked) and 'Include Inactive' (checked, circled in red). At the bottom, there are two dropdowns for 'Sort Results By' (set to 'Employee Last Name') and 'Sort Order' (set to 'Ascending'). A 'Search' button (circled in red) and a 'Clear Form' button are at the bottom left. A hint message is visible: '[HINT: Wildcard (%) search & 'Sounds Like' cannot be used together.]'.

4. Enter the **Last Name** and **First Name** of the employee who you want to add.
5. The **Include Inactive** check box is checked by default. Ensure this box is checked so that your search will include all employees in SACWIS (past and present).
6. Click the **Search** button.

Adding a Private Agency Employee into SACWIS

The **Employee Search Results** section appears at the bottom of the screen.

Employee Search Results
Result(s) 1 to 1 of 1 Page 1 of 1

ID	Name	Work Number	State/County	Supervisor	Unit
[redacted]	SACWIS, SUSIE				

[edit](#) Managed Units: [redacted]

[Add Employee](#)

- If the desired person is returned, click the **Edit** link next to the person's name.
 - The **Employee Information** screen appears.
 - Skip to the [Completing the Employee Information Screen](#) section below.
- If the desired person is not returned, click the **Add Employee** button.

The **Person Search Criteria** screen appears.

Person Search Criteria

Prefix: [dropdown]
Last Name: [text] AKA Sounds Like
First Name: [text] [HINT: AKA / 'Sounds Like' applies to last/first/middle name only. Wildcard (%) search & 'Sounds Like' cannot be used together.]
Suffix: [dropdown]
Middle Name: [text]
DOB: [text] [calendar] or From Age: [text] To Age: [text]
Gender: [dropdown] Race: [dropdown] Hispanic/Latino: [dropdown]
Person ID: [text]

Advanced Search Criteria

Sort Results By: [Last Name Ascending dropdown]

[Search](#) [Clear Form](#) [Return](#)

- Complete a **Person Search** to determine if the desired person already exists in SACWIS for a reason other than as an employee.

The **Person Search Results** section appears at the bottom of the screen.

Person Search Results
Result(s) 1 - 1 of 1 Page 1 of 1

Person ID	Name	Street	City	State/Zip	Gender	Age	DOB	Active Case
[redacted]	SACWIS, SUSIE Related Persons							

[select](#)

[Return](#) [Create New Person](#)

Adding a Private Agency Employee into SACWIS

Completing the Employee Information Screen

1. In the **Hire Date** field, enter the date that this employee was (or will be) hired.

Note: If a date already appears in the **Hire Date** field because the person was previously an employee:

- Uncheck the **Termination** checkbox (shown in blue below).
- Delete the date in the **Termination Date** field (shown in blue below).
- Enter the new date in the **Hire Date** field.
- If needed, click the **Job History** tab to view the person's job history in SACWIS.

Administration » Staff » Maintain Staff

Basic **Job History** BCI Demographics Licenses

Employee Name: SACWIS, SUSIE Employee ID: []

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
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[Add Job](#)

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

2. In the **Email Address** field, enter the email address of the new employee.
3. Click the **Apply** button at the bottom of the screen.
4. In the **Current Job** section of the screen, click the **Add Job** button.

Current Job

Start Date	End Date	County	Agency	Unit	Supervisor	Job Title
------------	----------	--------	--------	------	------------	-----------

[Add Job](#)

Adding a Private Agency Employee into SACWIS

The **Job Details** screen appears.

Administration » Staff » Maintain Staff

Employee Name: SACWIS, SUSIE Employee ID: [REDACTED]

Job Details

Start Date: * [Date Picker] **End Date:** * [Date Picker]

County: * [Please Select a County] **Agency:** * [Please Select an Agency]

Unit: * [Please Select a Unit] **Supervisor:** * [Please Select a Supervisor]

Job Title: * [Please Select a Job Title]

Agency Information

Street:
City:
Zip Code:

Save **Cancel**

5. Enter the employee's **Start Date**. (Required)
6. Select the employee's **County**. (Required)
7. Select the employee's **Agency**. (Required)
8. Select the employee's **Unit**. (Required)
9. Select the employee's **Supervisor**. (Required)
10. Select the employee's **Job Title**. (Required)
11. Click the **Save** button.

Adding a Private Agency Employee into SACWIS

Completing & Submitting the JFS 07078 Form

To add a **Private Agency Employee** to SACWIS, an **ODJFS Code of Responsibility form (JFS 07078)** must be completed and signed for each employee to be added. The form is attached with this article on the Knowledge Base at the following link:

<http://jfskb.com/sacwis/index.php/privates/143-administration/69-adding-a-private-agency-employee-into-sacwis>

Important: For an example of a completed 7078 form, please refer to the [JFS 07078 Form](#) section at the end of this article.

Complete the following steps to fill out and submit the **JFS 07078** form.

1. At the top of the form, provide all requested information, including in the following fields:
 - **Agency Type** – select **Private/non-profit**.
 - **County Agency** – enter the agency's name.
 - **State Office** – enter **N/A**.
 - **Bureau/Work Unit** – enter **N/A** for Bureau; enter the Unit in SACWIS in which the worker will be assigned.
 - **Access Requested** – select **SACWIS**.
2. Print and sign the **JFS 07078** form.
3. Send an email to SACWIS_ACCESS@jfs.ohio.gov with the following information:
 - The **Name** of the new employee.
 - The **Employee ID** of the new employee.
 - The attached PDF of the completed **JFS 07078** form.

Adding a Private Agency Employee into SACWIS

Completing the Setup Process

After submission of the completed **JFS 07078** form:

1. SACWIS_ACCESS will work with InfoSec (AKA Access Control) to set up an **LDAP** (a user login ID) for the new employee.
2. After the **LDAP** is linked in the SACWIS application, SACWIS_ACCESS will reply to your email with the employee's login information.
3. The agency then sets up the worker's **Security User Groups**.
4. Inform the new employee of their login information.

JFS 07078 Form Example

Please fill out the following form. You can save data typed into this form.

Reset Form

Ohio Department of Job and Family Services
CODE OF RESPONSIBILITY
* PLEASE PRINT *

Name (First, MI, Last) Sally Worker		Work Phone (330) 555-5555	Supervisor Sam Supervisor
County Holmes	County Agency ABC Agency	State Office N/A	Bureau/Work Unit N/A / Intake
AGENCY TYPE: <input type="checkbox"/> ODJFS <input type="checkbox"/> Non-ODJFS State <input type="checkbox"/> County <input type="checkbox"/> Local Govt. <input checked="" type="checkbox"/> Private/non-profit <input type="checkbox"/> Federal			
<input type="checkbox"/> Contract Employee	Contract Company Name	Contract telephone No.	
ACCESS REQUESTED: (Local Security Coordinator/Supervisor use only)			
<input type="checkbox"/> ODJFS network / email access	<input type="checkbox"/> CRISE	<input type="checkbox"/> SETS	<input checked="" type="checkbox"/> SACWIS <input type="checkbox"/> MMIS
OTHER access			
Novell Container		Existing RACF / Novell ID's	

If you need additional information or assistance, please contact the SACWIS Help Desk.

CODE OF RESPONSIBILITY

* PLEASE PRINT *

Name (First, MI, Last)		Work Phone	Supervisor	
County	County Agency	State Office	Bureau/Work Unit	
AGENCY TYPE: <input type="checkbox"/> ODJFS <input type="checkbox"/> Non-ODJFS State <input type="checkbox"/> County <input type="checkbox"/> Local Govt. <input type="checkbox"/> Private/non-profit <input type="checkbox"/> Federal				
<input type="checkbox"/> Contract Employee		Contract Company Name	Contract Telephone No.	
ACCESS REQUESTED: (Local Security Coordinator/Supervisor use only)				
<input type="checkbox"/> ODJFS network / email access		<input type="checkbox"/> CRISE	<input type="checkbox"/> SETS	<input type="checkbox"/> SACWIS
OTHER access				
Novell Container		Existing RACF / Novell ID's		

PLEASE READ CAREFULLY

Security and confidentiality are a matter of concern for all users of the Ohio Department of Job and Family Services (ODJFS) information systems and all other persons who have access to ODJFS confidential data. Each person that is entrusted with an authorized ID to access ODJFS systems, holds a position of trust relative to this information and must recognize the responsibilities entrusted to him/her in preserving the security and confidentiality of this information. Confidentiality requirements contained in law include, but are not limited to, 45 CFR Parts 160 and 164 (HIPAA—45 CFR 164.501); 42 CFR 431.300 through 431.307; 5 USC 552a; 7 CFR 272.1(c); Ohio Revised Code (ORC) sections 5101.27 through 5101.31, 5101.99, 3107.17, 3107.42, 3107.99, 3121.894, 3121.899, 3121.99, 3125.08, 3125.50, 3125.99, 4141.21, 4141.22 and 4141.99; and OAC rules 4141-43-01 through 4141-43-03.

An authorized user's conduct either on or off the job may threaten the security and confidentiality of this information. It is the responsibility of every user to know, understand and comply with the following:

1. I acknowledge receiving and agree to abide by the ODJFS Information Security Policy and ODJFS Computer and Information Systems Usage Policy. These policies, available via the ODJFS InnerWeb or upon request, can also be provided by either my supervisor or the ODJFS Access Control Unit. It is my responsibility, as the person requesting access, to become familiar with these policies.
2. I will not make or permit unauthorized uses of any information maintained by ODJFS, regardless of the medium in which it is kept.
3. I will only access information about recipients of ODJFS benefits or services, or about ODJFS employees, that is collected and maintained on ODJFS or state computer systems for those purposes authorized by ODJFS, and as directly related to my official job duties and work assignments for, and on behalf of, ODJFS and/or a federal oversight agency.
4. I will not seek to benefit personally or permit others to benefit personally from the use or release of any confidential information (as identified in federal and state laws and regulations) which has come to me by virtue of my work assignment.
5. I will not exhibit or divulge the contents of any record to any person except in the conduct of my work assignment or in accordance with the policies of ODJFS.
6. I will not knowingly include or cause to be included in any record or report false, inaccurate or misleading information.
7. I will not remove or cause to be removed copies of any official record or report from any file from the office where it is kept, except in the normal conduct of my work assignment and in accordance with the policies of ODJFS.
8. I will not violate rules and/or regulations concerning access and/or improperly use security entry cards or codes for controlled areas.
9. I will not divulge or share either my security code(s) (e.g., sign-on, password, key card, PIN, etc.) or the security code(s) of any other person or entity who performs work for or with, receives benefits from, or who accesses ODJFS systems and/or facilities.
10. I will immediately report any violation of this code of responsibility to my supervisor and/or the OIS Access Control Unit.
11. I will not aid, abet or act in conspiracy with another or others to violate any part of this code.
12. I will not load any personally-owned software or software not licensed to ODJFS on any ODJFS-owned equipment without "proper authorization," as defined in the ODJFS Information Security Policy.
13. I will treat all case record material as confidential, and will handle Income and Eligibility Verification System (IEVS) material with extra care. I understand that Internal Revenue Code Sections 7213(a), 7213A and 7431 provide civil and criminal penalties for unauthorized inspection or disclosure. These penalties include a fine of up to \$5000 and/or imprisonment of up to 5 years.
14. I will also comply with the terms of any business associate or data sharing agreement that has been entered into by my employer.

In addition to applicable sanctions under federal and state regulations, violations of this policy will be reviewed on a case-by-case basis and may result in disciplinary action up to and including removal.

I have read, understand and will comply with this ODJFS Code of Responsibility.

Applicant Signature	Date
Supervisor Signature	Date

FOR Access Control Use ONLY

1. Form Instructions: Redacted

Instructions for Adding a Private Agency Employee to SACWIS

1. On the SACWIS **Home** screen, click the **Administration** tab.
2. Click the **Staff** tab.
3. Click the **Maintain Staff** link in the **Navigation** menu on the left. The **Employee Search Criteria** screen appears.
4. In the appropriate fields, enter the last name and first name of the employee who you want to add.
5. Click the **Include Inactive** check box so your search includes all employees in SACWIS (past and present).
6. Click the **Search** button.
7. If the desired person is returned, click the **Edit** link next to the person's name. The **Employee Information** screen appears.
8. If the desired person is not returned, click the **Add Employee** button. The **Person Search Criteria** screen appears.
9. Complete a person search to see if the desired person exists already in SACWIS for a reason other than as an employee.
10. If the person that you want is returned, click the **Select** link next to their Person ID.
11. If no person is returned, click the **Create New Person** button.
12. Create the new person record.
13. Save the new person record.
14. Click the **Select** link next to the Person ID.
15. On the **Employee Information** screen, enter the date that this employee was/will be hired in the **Hire Date** field. (If a date already appears in the field because the person was a previous employee, unclick the **Termination** check box. Delete the date in the **Termination Date** field. Enter the new date in the **Hire Date** field. If needed, click the **Job History** tab on that screen to view that person's job history in SACWIS.)
16. In the **Email Address** field, enter the e-mail address of the new employee.
17. Click the **Apply** button.
18. On the **Employee Information** screen, click the **Add Job** button.
19. On the **Job Details** screen, complete the following fields: **Start Date**, **County**, **Agency**, **Unit**, **Supervisor**, and **Job Title**.
20. Click the **Save** button.
21. Email **SACWIS_ACCESS@jfs.ohio.gov** with the employee's **Name**, **Employee Id**, and pdf of the completed **JFS 07078** form.
22. SACWIS_ACCESS will work with InfoSec (AKA Access Control) to set up a **LDAP**, which is a user login id, for the new employee. After the **LDAP** is linked in SACWIS, they will respond back with the login information.
23. The county then sets up the worker's **Security User Groups**.
24. Inform the new employee of their login information.

List of All User Groups (13) that are Available to Private Agencies

Current User Groups (From Private Agency Phase I)

Private Agency – Fiscal Worker: This user group provides the access needed to create and process foster parent training payments.

Private Agency – Training Worker: This user group was previously called Private Provider Worker. This is the user group that provides access to enter and maintain foster parent training records.

New User Groups for Private Agency Phase II

Private Agency – Home Study Assessor Supervisor: This user group provides the security needed to review, edit, and approve home studies. It provides access to all of the provider left hand navigation links, reports, inquiries, training records, and approvals/certification recommendations. It also allows for the ability to be assigned as a delegate and assign delegates if the supervisor is also a unit supervisor.

Private Agency – Home Study Assessor: This user group provides the security needed to review, edit, and complete home studies. It provides access to all of the provider left hand navigation links, reports, inquiries, and ability to create approvals/certification recommendations.

Private Agency – Inquiry Worker: This user group provides the security needed to create and maintain inquiries in SACWIS including the ability to link inquiries to existing provider records or create new provider records.

Private Agency – Recruitment Worker: This user group provides the security needed to create recruitment plans and recruitment events in SACWIS and run the associated reports.

Private Agency – Provider Read-Only: This user group provides the user the ability to look at all areas of the provider record, inquiries, and recruitment in a view/report only mode – no edit abilities.

Private Agency – Security Admin: This user group provides the security needed to maintain employee records in SACWIS, maintain agency unit & supervisor records, create agency broadcast messages, assign security user groups to agency staff, and create agency-defined user groups. *** The person(s) designated as the Private Agency Security Admin for your agency will need to have **ALL 11** user groups assigned to them in SACWIS because they cannot assign someone to a user group they do not possess. ***

Private Agency – AP Search Worker: This user group provides the security to access the AP Search History link on all provider records regardless of assignment. It also provides access to the AP Search Workload.

Private Agency – Supervisor Delegate: This user group gives unit supervisors the ability to assign delegates and be delegates for other supervisors. It also gives a worker the ability to be a delegate for a supervisor but the worker cannot have their own delegates. (Note: Supervisor Delegate security is built into the Assessor Supervisor user group as well.)

Existing State-Defined User Groups for Private Agencies

Non- ODJFS Provider Creator: This user groups provides the security needed to create new Non-ODJFS provider records in SACWIS. Persons with this security need conduct thorough searches of existing Non-ODJFS providers in SACWIS prior to creating a new provider in order to avoid duplication of records.

Person Background: This user group provides the security needed to add TCN numbers for provider participants without being assigned to the provider record.

SSN Administrator: This user group provides security to view SSNs in SACWIS regardless of assignment to the individual's provider record. ***This is a **State Exclusive** user group meaning that only a **State Security Admin** can assign this access to private agency users. Agencies must request access for staff through the SACWIS Help Desk and are limited to the number of agency users who can have this security. The limits are based off of agency size and business need. ***

Supervisor Delegates

Based on the feedback from the Phase I Pilot agencies, it was determined that **Supervisor Delegate** security will be needed for Private Agencies. Below is a summary of how to set up Supervisor Delegates for private agencies.

- In order to **assign** a delegate you must be a **Unit Supervisor** (as opposed to just having the assignment role of supervisor). A Unit Supervisor is someone who is listed as a supervisor for a unit under the Admin/Maintenance/Unit&Supervisor link as shown below.

OHIO SACWIS (1) home search help & training log off
Logged In: Williams,Lindsay [Ohio Department of Job and Family Services]

Home Intake Case Provider Financial Administration
Staff Maintenance Security Reports Training Utilities help

Agency Information
Unit & Supervisor
Tickers
Notifications
Lookup Data
Ticklers Disposal
Broadcast Message
Court Information

Unit & Supervisor Search Criteria
County: * Licking
Agency Name: * House of New Hope, Inc.
Search

Unit & Supervisor Search Results
Result(s) 1 to 4 of 4 Page 1 of 1

	Name	Agency	Supervisor(s)	Modified Date	Modified By
edit	Administration	House of New Hope, Inc.	Administrator 0242, Administrator 0242 Cromwell, Melissa Ferguson, Linda Greene, Jeffrey Hornyak, Lisa Jackson, Rita Jones, Kim Lee, Betty Ligon, Alice Meanor, Ryan Nelson, Rhonda Spencer, Heather Starr, Kimberleah Tesi, Christopher Tucker, Colleen	05/25/2007	Robbins, Falon
edit	Adoptions	House of New Hope, Inc.	Greene, Jeffrey Young, Rachel	02/02/2015	Williams, Lindsay
edit	Financial	House of New Hope, Inc.	Greene, Jeffrey	03/14/2012	Data Fix, SACWIS
edit	Licensing	House of New Hope, Inc.	Pack, Brenda	03/14/2012	Data Fix, SACWIS

Add Unit

- Assigning a delegate gives the **Delegate** access to your **Assignments** (not your approvals).
 - i.e. If your assessor(s) route a home study to your delegate while you are on vacation the delegate does **NOT** have the implicit supervisor rights to your provider, meaning that the delegate would still need to assign themselves to the provider in order to approve the home study.
- To view the Assignments for a supervisor to which you are a delegate, go to Home/Assignments and select that supervisors name from the 'Assignments For' list and click Show. Notice that I am logged in as Rita Jackson. Melissa has assigned Rita as her delegate so now Rita can see Melissa's assignments.

OHIO SACWIS UAT (1) home help & training switch profiles log off
Logged In: Jackson,Rita [House of New Hope, Inc.]

Home Case Provider Financial Administration
Desktop Approvals Assignments help

Work Assignments

Assignments for: Cromwell, Melissa Show
Self
Jackson, Rita Cromwell, Melissa Assignments: 0 Provider Assignments: 37

Assign Assign by Geographical Designation

To **Add a Delegate**, go to Admin/Staff/Delegate Assignment and click Add Delegate. **Note:** You can add multiple people as your delegates.

OHIO SACWIS UAT [1] home help & training switch profiles log off
 Logged In: Jackson,Rita [House of New Hope, Inc.]

Home Case Provider Financial Administration
 Staff Maintenance Security Reports Training Utilities

On-Call Employee
 Maintain Staff
 Delegate Assignment

Current Delegates
 Result(s) 1 to 1 of 1 Page 1 of 1

	Employee ID	Name	Start Date	End Date
edit	6921535	Cromwell, Melissa	02/13/2015	

Add Delegate

Enter the name of the person you want to add as your delegate and search. (Remember they must be a Unit Supervisor to be selectable.) They will appear in the results list. Click Select.

Delegate Search Criteria
 Agency: House of New Hope, Inc. [HINT: Wildcard (%) search applies to last/first name.]

Last Name: * Starr
 First Name: Kimberleah

Search Cancel

Delegate Search Criteria
 Result(s) 1 to 1 of 1 Page 1 of 1

	Employee ID	Name	Unit
select	3856385	Starr, Kimberleah	Administration

Security for Supervisor Delegates

1. Anyone with the **Private Agency – Assessor Supervisor** user group can be a delegate and can add delegates.
2. The user group **Private Agency – Supervisor Delegate** can be assigned to staff that do NOT have the user group Private Agency – Assessor Supervisor to allow them to function as delegates. (i.e., if you have a lead assessor that needs to be able to make assignments on your behalf.)

Online Reports that are Accessible to Private Agencies

Inquiry Search Report (RPT 359): Generates from link at bottom of inquiry search page.

Inquiry Profile Report (RPT 145): Generates from the inquiry search page. There is a report link next to each separate inquiry.

Provider Activity Report Specification (RPT 140): Generates from report link at the bottom of provider activity log history page.

Provider Activity Note Report Specification (RM25): Generates from the report link to the left of each provider activity note.

JFS 01609 Family Permanency Planning Data Summary (RPT 172): Generates from the 'forms and notices' link in the blue left hand navigation menu within the provider record.

Training Letter Report Specification (RPT 281): Generates from the 'forms and notices' link in the blue left hand navigation menu within the provider record.

JFS 1673a Child Characteristics Checklist Report Specification (RPT 136): Generates from the acceptance criteria page and also from report link next to provider home study.

JFS1673 Home Study Report (RPT 135): Generates from the report link next to provider home study.

JFS 01385 Home Study Amendment Report (RPT 137): Generates from the report link next to provider home study.

JFS 01348 Safety Audit: Generates from the report link next to provider home study.

JFS1213 Notice of Approval for Foster Home: Generates from the report link on the approval/certification page of the provider record.

JFS 01334 Recommendation for Transfer of a Foster Home (RPT 132): Generates from the report link on the approval/certification page of the provider record.

Notification of Adoption Approval (RPT 179): Generates from the report link on the approval/certification page of the provider record.

Provider Placement History Report (RPT 376): Generates from the 'forms and notices' link in the blue left hand navigation menu within the provider record.

FC Exit Interview Report (RPT 354): Generates from the placement history page in the provider record.

Rule Violation Summary: Generates from the report link next to the specific rule violation.

JFS 01315 Notice of Denial of Initial Certification/Recertification: Generates from the report link next to the specific rule violation.

Recruitment Event Details (RPT 025): This report is available through the recruitment link and provides details of the recruitment event that has been recorded in SACWIS.

Central Registry Workload Report: This report is located in the central registry workload and provides a summary of CR requests that have been completed.

Administration Reports Available to Private Agencies

Certification Activity: This report gives a list of providers based on expiration date, effective date, or active during the selected date range. It provides information such as level of care, service limits, last transaction (recommendation), approval/certification date, expiration date, and JFS 1331 due date range.

Foster Parent Training Report: Provides a summary of foster parent training attendees for your agency including reimbursement information. No changes were made to this report as part of the Private Agency Phase II rollout.

Inquiry Activity and Outcome Summary: This report was updated to combine the Inquiry Activity and the Inquiry Outcome Summary reports into one. The report provides information on required activities for the inquiry process including worker name, inquiry id, inquiry date, inquirer name, reason for inquiry/provider type, dates for information packet mailed, application provided, application received, invited to/attended pre-service training, and the current inquiry status.

Maintain Licensing Activities Report: This report displays a list of providers (based on the application received date(s) selected) and lists the home study progress. It includes information such as application received date, date assigned to an assessor, home study start date, home study disposition date, number of days from application received to start date, number of days from home study disposition to certification disposition, and total days to approval.

MEPA Provider Report: This report was designed to help agencies quickly view the criteria they need to provide for MEPA monitoring reviews. It is also useful to MEPA monitors as it generates a random number for each provider as well. No changes were made to this report as part of the private agency phase II rollout.

Provider Counts and Vacancies Report: This report provides an overview of service limits and vacancies (available beds and cribs) and was updated as part of private agency phase II to list the current placements in the home. It also lists the acceptance criteria for the home.

Provider Directory Report: Provides a list of all active homes for your agency. This report was updated to include school district at the request of the Private Agency Council.

Provider Maltreatment and Licensing Violation Report: This report provides intake information on provider members for your agency that have been listed as an AP on 'screened in' intake AND their provider id was linked on the 'Out of Home Care' tab on the intake. It also includes a list of provider members who are participants on 'I&R' intakes with the type of 'Licensing Rule Violation'. Note: The report only displays provider members where the intake received date intersects with the active provider type for your agency and does NOT include interfamilial reports.

Provider Participants Report: This report lists all current/active provider participants for your agency, their provider type, training type, training hours completed, provider id, and certification period. This report was not updated as part of private agency phase II.

Recruitment Event/Participants Report (Plan): This is the agency Recruitment Plan report which will be submitted (routed) through SACWIS once your agency is live. It can also be accessed through the Provider/Recruitment/Plan tab. This report was not updated as part of private agency phase II.

Recruitment Event/Participants Report (Summary): This report is a summary of all the recruitment events entered into SACWIS by your agency. It can also be accessed through the Provider/Recruitment/Events tab.

Reimbursement Reconciliation Report - RPT 313: This report helps reconcile the reimbursements you received (per voucher year/voucher id) with the payment reimbursements you've requested/submitted to the state. This is not a new report and was not updated as part of private agency phase II.

SACWIS Employee User Group Report: This report provides a list of security user groups assigned to active workers for your agency. This report was not updated as part of Private Agency Phase II.

SACWIS User Report: This report gives a list of active users for your agency, their InfoSec Id (Username), most recent access/end date, job title, most recent job start/end date, hire date, termination date, last accessed the application date/time, and on leave indicator. This report was not updated as part of Private Agency Phase II.

Ongoing Technical Assistance (TA) and Support

SACWIS Provider Team – [SACWIS Provider Team@jfs.ohio.gov](mailto:SACWIS_Provider_Team@jfs.ohio.gov)

- For general (provider) functionality questions and troubleshooting

SACWIS Help Desk – [SACWIS Help Desk@jfs.ohio.gov](mailto:SACWIS_Help_Desk@jfs.ohio.gov)

- 1 (800) 686-1580 – choose option 3 and then 5
- For functionality questions and data issues
- Available to assist from 8:00 a.m. – 500 p.m. Monday through Friday

The SACWIS Knowledge Base – <http://jfskb.com/sacwis/>

- A vast resource including step-by-step instructional articles on almost every function that a user may be required to complete in SACWIS
- Links to Training Videos that are posted on the SACWIS YouTube page

Training Videos/Recorded Webinars – <https://www.youtube.com/user/ODJFSOCF>

- Instructional webinars and meetings may be recorded and posted here for review at a later date.

Captivate Videos – <https://www.youtube.com/user/ODJFSOCF>

- Walk users through the click to complete a function in SACWIS.
 - We have begun to establish a catalog of create captivate videos.
 - Used as a resource for Private Agency Phase II training/support

Agency Super User

- Each Agency will select one or more (based on agency size) user to attend the Super User Training during their rollout phase.
- This person is an agency level resource and will develop a working relationship with state contact person and HD staff to troubleshoot issues.

Weekly Touch Point Calls

- In June 2015 (Phase II goes live), we will implement weekly touch point calls for users to call in with functionality questions/comments/issues to communicate with state staff and receive technical assistance.
- Users will be given the opportunity to email questions from their agency ahead of time.

Direct BA (business analyst/state staff) Support

- Each agency has been assigned a SACWIS contact person from the Provider Team to contact directly with questions/requests for TA.

Note: Other technical assistance requests will be reviewed to determine how TA will be provided. (i.e., Agency-wide TA on a specific area may be provided via webinar or go to meeting or agency visit.)

SACWIS Contact Person	Agency Name
Lindsay Williams (614) 387-8629 Lindsay.Williams@jfs.ohio.gov	A New Leaf, Inc. A.C.T.I.O.N., Inc. Access For Youth, Inc. Adolescent Oasis, Inc. Adopt America Network Adoption by Gentle Care Adoption Circle Adoption Home Study Services of Ohio, Inc. Adoption Link, Inc. Adoption Professionals, LLC Adoption S.T.A.R. Adriel School, Inc. Advantage Family Outreach and Foster Care Agape for Youth, Inc. All God's Children International Alliance Human Services, Inc. America World Adoption Association-Ohio American International Adoption Agency, Inc. Angels Guarding Youth Services, Inc. Applewood Centers, Inc. Bair Foundation, Inc. Beech Acres Beech Brook

SACWIS Contact Person	Agency Name
Linda Ferguson (614) 387-8895 Linda.Ferguson@jfs.ohio.gov	Bellefaire Jewish Children's Bureau Bethany Christian Services of Ohio Brightside Adoption Connection, LLC Buckeye Ranch, Inc. Building Blocks Adoption Service, Inc. Caregiver's Helpers, Inc. Caring for Kids, Inc. Catholic Charities Corporation dba Parmadale Catholic Charities Regional Agency Catholic Charities-Diocese of Toledo Catholic Social Services of the Miami Valley Center for Child & Family Development Child Focus, Inc. Children Have Options in Caring Environments (CHOICES) Inc. Choice Network, Inc. Christian Children's Home of Ohio, Inc. Community Services of Stark County, Inc. Community Teaching Homes, Inc. Diversion Adolescent Foster Care, Inc. Dungarvin Ohio, Inc. ENA, Inc. Envision European Adoption Consultants

SACWIS Contact Person	Agency Name
Kim Starr 614-387-8868 Kimberleah.Starr@jfs.ohio.gov	Family & Community Services Focus on Youth, Inc. Forever Home Adoptions, Inc. Homes for Kids, Inc. House of New Hope, Inc. House of Samuel, Inc. Inner Peace Homes, Inc. Isaiah's Place Jewish Family Service, dba Adoption Connection Keeping Kids Safe, Inc. Kids Count Too, Inc. LDS Family Services Life Start, Inc. Lighthouse Youth Services, Inc. Little Bit of Heaven Adoption Marsh Foundation Mended Reeds, Inc. Mid-Western Children's Home National Youth Advocate Program Northeast Ohio Adoption Services Oasis Therapeutic Foster Care Network, Inc. Oesterlen Services for Youth Ohio Behavioral Healthcare, Inc.

SACWIS Contact Person	Agency Name
Melissa Cromwell (614)752-0312 Melissa.Cromwell@jfs.ohio.gov	Ohio Mentor, Inc. OhioGuidestone Options for Families and Youth Pathway Caring for Children Pressley Ridge Private Adoption Services, Inc. Res-Care Ohio, Inc. dba ResCare Youth Services Sojourners Care Network South Community, Inc. Specialized Alternatives for Families & Youth of Ohio, Inc. (SAFY) Spirit of Faith Adoptions St. Aloysius Orphanage St. Joseph Orphanage St. Vincent Family Center Synergy Family Foster Care, Inc. Transitions For Youth TRU-ROB Counseling & Consulting, LLC Twelve of Ohio, Inc. United Methodist Children's Home Village Network Youth Advocate Services