System Administration

Exercises

This packet contains the exercises listed below. Complete them at your own pace. If you need help, remember to use your User Guide, WBT, online help, or online policies. Ask the trainer for assistance if you can't find the answer to your questions in these sources.

What you'll do

- ❑ Build an organizational hierarchy
- ❑ Create a user group
- ❑ Set up a new employee
- ❑ Perform other basic tasks

Important: These exercises may not reflect the process flow at your county or office. They use contrived data for training purposes. Still, you can apply what you learn in class to the processes at your office.

Exercise SA-1. Build an organizational hierarchy

Scenario

Workgroup management and automatic routing features work effectively only so long as Ohio SACWIS contains an up-to-date record of an agency's reporting structure. As a system or staff administrator, you are responsible for maintaining this record. You may never actually have to build a hierarchy from scratch, but by working through this exercise you'll understand how information is organized and gain the skills you need to maintain your agency's data.

In this exercise, you will create a simple organizational hierarchy in a county with four staff members:

- Kim Lynn is the agency's director
- Pat Rush is the Children Services Administrator
- Chris Black supervises the Ongoing unit
- Fran Miller works for Chris

Tasks

- Task 1. Search for existing records
- Task 2. Add person and employee records for Kim Lynn
- Task 3. Define Kim's job
- Task 4. Add a unit under Kim
- Task 5. Assign Kim to a user group
- Task 6. Add person and employee records for Pat Rush
- Task 7. Define Pat's job
- Task 8. Add a unit under Pat
- Task 9. Assign Pat to a user group
- Task 10. Add person and employee records for Chris Black
- Task 11. Define Chris's job
- Task 12. Add a unit under Chris
- Task 13. Assign Chris to appropriate user groups
- Task 14. Add person and employee records for Fran Miller

- Task 15. Define Fran's job
- Task 16. Assign Fran to a user group

Task 1. Search for existing records

You must start at the top of the organizational hierarchy, which in this case means that you begin by entering the agency's director, Kim Lynn. Before you add any employee to Ohio SACWIS, however, the system requires you to search the database and confirm that neither an employee record nor a person record already exists.

Note

It's critically important not to create two or more records for the same person. Therefore, you should always search for an existing person record before you create one.

1. On the Ohio SACWIS Home screen, click the **Administration** tab.
2. Click the **Staff** tab.
3. Click the **Maintain Staff** link. The Employee Search screen appears.
4. Complete the following fields to search for an employee record:

Field Name	Information to Enter/Select	Notes
Last Name	Lynn##	
First Name	Kim	

5. Click **Search**. The system does not find an employee record for Kim Lynn. Next, you need to check for a person record.
6. Click **Add Employee**. The Person Search screen appears.
7. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Last Name	Lynn##	
First Name	Kim	

8. Click **Search** to search for a person record.

Result The system does not find a person record for Kim. You have now determined that Kim has neither an employee nor a person record in the system.

Task 2. Add person and employee records for Kim Lynn

Use the Person Information screen to create a person record for Kim, and then return to the Add Employee function.

Note

In a real situation, you would normally enter more information when you created a person record. However, you always have the option of creating a simple record, finishing your primary task, and then adding information to the person record later.

1. Click **Add Person**. The Person Information screen appears. Kim's first and last names prefill the appropriate fields.
2. Click **Save**. The system saves a new person record and displays the Employee Information screen.
3. Complete the following fields:

Field Name	Information to Enter/ Select	Notes
Employee ID [County]	*KL##*	This field is for county IDs only and accepts up to 12 characters, both alpha and numeric.
Email Address	*Ohio SACWIS_TRAINING@ odjfs.state.oh.us*	
Hire Date	Today's date	

4. Click **Apply**.
5. Select the **Supervisor Over-Ride** check box.

   Ohio SACWIS requires you to assign every employee to a unit and a supervisor. Selecting Supervisor Over-Ride bypasses the requirement so you can enter the top-level manager in the agency.
6. Click **Apply**.

Result The system saves your work without leaving the Employee Information screen. You have created new person and employee records for Kim Lynn.

Task 3. Define Kim's job

Access the Job Details screen and define Kim's job as agency director.

1. Click **Add Job**. The Job Details screen appears.
2. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	
County	Franklin	
Agency	Franklin County Children Services Board	
Job Title	Agency Director	

3. Click **Save**.
4. Click **Save** again.

Result The system saves your entry and returns to the Employee Search screen.

Task 4. Add a unit under Kim

Use the Unit & Supervisor Details screen to create a unit and assign Kim Lynn as its supervisor.

1. Click the **Maintenance** tab.
2. In the menu on the left, click **Unit & Supervisor**. The Unit & Supervisor Search screen appears.
3. Complete the following fields (if they are not prefilled):

Field Name	Information to Enter/Select	Notes
County	Franklin	
Agency	Franklin County Children Services Board	

4. Click **Search** to display a list of existing units.
5. Click **Add Unit**. The system displays the Unit & Supervisor Details screen.
6. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Unit Name	Administration##	
Description	This is the management unit.	

7. Click **Save**. The system saves your work and returns to the Unit & Supervisor Search screen.
8. Click the **edit** link by the new Administration## unit. The Unit & Supervisor Details screen appears.
9. Click **Add Supervisor**. The Employee Search screen appears.
10. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Last Name	Lynn##	
First Name	Kim	

11. Click **Search**. Kim's record appears in the search results.

12. Click the **select** link for Kim's record. The system displays the Supervisor screen.
13. Enter today's date in the **Start Date** field.
14. Click **Save**. The system saves your work and returns to the Unit & Supervisor Details screen, where a new row has been added to the Supervisor(s) table.
15. Click **Save** on the Unit & Supervisor Details screen.

Result The system saves your work and returns to the Unit & Supervisor Search screen

Task 5. Assign Kim to a user group

Since Kim is the agency's Director, assign her to the Super User Group.

1. Click the **Security** tab.
2. In the menu on the left, click **Assign User Groups**. A User Search screen appears.
3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Agency	Franklin County Children Services Board	
Last Name	Lynn##	

4. Click **Search**.
5. Find Kim's name in the search results and click the **edit** link beside it. The User Details screen appears.
6. Click **Add User Groups**. The User Group Search screen appears.
7. Click **Search**. The system lists all the state-defined user groups.
8. Select the check box for Super User Group (on page 8 of the search results).
9. Click **Save**. The system saves your work and returns to the User Details screen and displays the Super User Group in the User Groups area. With this assignment, you've given Kim full administrative permissions in the system.
10. Click **Save**.

Result The system saves your work and returns to the User Search screen.

Task 6. Add person and employee records for Pat Rush

Now you're ready to enter information about another employee: Pat Rush, the Children Services Administrator. Add new person and employee records for Pat (after you confirm that none already exist).

1. Click the **Staff** tab.
2. Click the **Maintain Staff** link. The Employee Search screen appears.
3. Complete the following fields to search for an employee record:

Field Name	Information to Enter/Select	Notes
Last Name	Rush##	
First Name	Pat	

4. Click **Search**. The system does not find an employee record for Pat. Next, you need to check for a person record.
5. Click **Add Employee**. The Person Search screen appears.
6. Enter Pat's first and last names again in the appropriate fields.
7. Click **Search** to search for a person record. The system does not find one.
8. Click **Add Person**. The Person Information screen appears. Pat's first and last names prefill the appropriate fields.
9. Click **Save**. The system saves a new person record and displays the Employee Information screen.
10. Complete the following fields:

Field Name	Information to Enter/ Select	Notes
Employee ID [County]	PBR##	This field is for county IDs only and accepts up to 12 characters, both alpha and numeric.
Email Address	Ohio SACWIS_TRAINING@ odjfs.state.oh.us	
Hire Date	Today's date.	

11. Click **Apply**.

Result The system saves the new employee record without leaving the Employee Information screen.

Task 7. Define Pat's job

Access the Job Details screen and define Pat's job as the Children Services Administrator.

1. Click **Add Job** and complete the following fields on the Job Details screen:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	
County	Franklin County	
Agency	Franklin County Children Services Board	
Unit	Administration##	Double-check the two digits at the end of the unit name: be sure that you're selecting *your* unit and not someone else's!
Supervisor	Lynn##, Kim	
Job Title	Staff Administrator	

2. Click **Save**.
3. Click **Save** again.

Result The system saves your work and returns to the Employee Search screen.

Task 8. Add a unit under Pat

Use the Unit & Supervisor Details screen to create a unit and assign Pat as its supervisor.

1. Click the **Maintenance** tab.
2. In the menu on the left, click **Unit & Supervisor**. The Unit & Supervisor Search screen appears.
3. Complete the following fields (if they are not prefilled):

Field Name	Information to Enter/Select	Notes
County	Franklin	
Agency	Franklin County Children Services Board	

4. Click **Search** to display a list of existing units.
5. Click **Add Unit**. The system displays the Unit & Supervisor Details screen.
6. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Unit Name	Management Unit##	
Description	This is the unit used for all administrative staff.	

7. Click **Save**. The system saves your work and returns to the Unit & Supervisor Search screen.
8. Click the **edit** link by the new Management unit. The Unit & Supervisor Details screen appears.
9. Click **Add Supervisor**. The Employee Search screen appears.
10. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Last Name	Rush##	
First Name	Pat	

11. Click **Search**. Pat's record appears in the search results.

12. Click the **select** link for Pat's record. The system displays the Supervisor screen.
13. Enter today's date in the **Start Date** field.
14. Click **Save**. The system saves your work and returns to the Unit & Supervisor Details screen, where a new row has been added to the Supervisor(s) table.
15. Click **Save** on the Unit & Supervisor Details screen.

Result The system saves your work and returns to the Unit & Supervisor Search screen

Task 9. Assign Pat to a user group

Because of his management responsibilities, assign Pat to the Super User group.

1. Click the **Security** tab.
2. In the menu on the left, click **Assign User Groups**. A User Search screen appears.
3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Agency	Franklin County Children Services Board	
Last Name	Rush##	

4. Click **Search**.
5. Find Pat's name in the search results and click the **edit** link beside it. The User Details screen appears.
6. Click **Add User Groups**. The User Group Search screen appears.
7. Click **Search**. The system lists all the state-defined user groups.
8. Select the **Super User Group** check box. (Super User Group is on page 8 of the search results.)
9. Click **Save**. The system saves your work and returns to the User Details screen. With this assignment, you've given Pat full administrative permissions in The system.
10. Click **Save**.

Result The system saves your work and returns to the User Search screen.

Task 10. Add person and employee records for Chris Black
As you see, you follow a very consistent pattern to enter staff in the system. Now, let's add a caseworker. The caseworker's name is Chris Black.

1. Click the **Staff** tab.
2. Click the **Maintain Staff** link. The Employee Search screen appears.
3. Complete the following fields to search for an employee record:

Field Name	Information to Enter/Select	Notes
Last Name	Black##	
First Name	Chris	

4. Click **Search**. The system does not find an employee record for Chris. Next, you need to check for a person record.
5. Click **Add Employee**. The Person Search screen appears. Enter Chris's first and last names again in the appropriate fields.
6. Click **Search** to search for a person record. The system does not find a person record for Chris.
7. Click **Add Person**. The Person Information screen appears. Chris's first and last names prefill the appropriate fields.
8. Click **Save**. The system saves the new person record and returns to the Employee Information screen.
9. Complete the following fields:

Field Name	Information to Enter/ Select	Notes
Employee ID [County]	CAB##	This field is for county IDs only and accepts up to 12 characters, both alpha and numeric.
Email Address	Ohio SACWIS_TRAINING@ odjfs.state.oh.us	
Hire Date	Today's date	

10. Click **Apply**.

Result The system saves your work without leaving the Employee Information screen.

Task 11. Define Chris's job

Use the Job Details screen to define Chris's job as the Children Services Administrator.

1. Click **Add Job** and complete the following fields on the Job Details screen:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	
County	Franklin County	
Agency	Franklin County Children Services Board	
Unit	Management Unit##	
Supervisor	Rush##, Pat	
Job Title	Supervisor	

2. Click **Save**.
3. Click **Save** again.

Result The system saves your work and returns to the Employee Search screen.

Task 12. Add a unit under Chris

Use the Unit & Supervisor Details screen to create the Ongoing Unit, and assign Chris as its supervisor.

1. Click the **Maintenance** tab.
2. In the menu on the left, click **Unit & Supervisor**. The Unit & Supervisor Search screen appears.
3. Complete the following fields (if they are not prefilled):

Field Name	Information to Enter/Select	Notes
County	Franklin	
Agency	Franklin County Children Services Board	

4. Click **Search** to display a list of existing units.
5. Click **Add Unit**. The system displays the Unit & Supervisor Details screen.
6. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Unit Name	Ongoing Unit##	
Description	This unit is comprised of workers who provide case management services to families who need continuing services.	

7. Click **Save**. The system saves your work and returns to the Unit & Supervisor Search screen.
8. Click the **edit** link by the new Ongoing Unit##. The Unit & Supervisor Details screen appears.
9. Click **Add Supervisor**. The Employee Search screen appears.
10. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Last Name	Black##	
First Name	Chris	

11. Click **Search**. Chris's record appears in the search results.
12. Click the **select** link for Chris's record. The system displays the Supervisor screen.
13. Enter today's date in the **Start Date** field.
14. Click **Save**. The system saves your work and returns to the Unit & Supervisor Details screen, where a new row has been added to the Supervisor(s) table.
15. Click **Save** on the Unit & Supervisor Details screen.

Result The system saves your work and returns to the Unit & Supervisor Search screen

Task 13. Assign Chris to appropriate user groups

Assign Chris to both the Super User group and Supervisor group.

1. Click the **Security** tab.
2. In the menu on the left, click **Assign User Groups**. A User Search screen appears.
3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Agency	Franklin County Children Services Board	
Last Name	Black##	

4. Click **Search**.
5. Find Chris's name in the search results and click the **edit** link beside it. The User Details screen appears.
6. Click **Add User Groups**. The User Group Search screen appears.
7. Click **Search**. The system lists all the state-defined user groups.
8. Select the following two user groups:
   - Super User User Group
   - Supervisor Group

   (These are on page 8 of the search results.)
9. Click **Save**. The system saves your work and returns to the User Details screen. With this assignment, you've given Chris full administrative permissions in the system.
10. Click **Save**.

Result The system saves your work and returns to the User Search screen.

Task 14. Add person and employee records for Fran Miller

Conduct the appropriate searches, and then add a person record and an employee record for Fran.

1. Click the **Staff** tab.
2. Click the **Maintain Staff** link. The Employee Search screen appears.
3. Complete the following fields to search for an employee record:

Field Name	Information to Enter/Select	Notes
Last Name	Miller##	
First Name	Fran	

4. Click **Search**. The system does not find an employee record for Fran. Next, you need to check for a person record.
5. Click **Add Employee**. The Person Search screen appears. Enter Fran's first and last names again in the appropriate fields.
6. Click **Search** to search for a person record. The system does not find a person record for Fran.
7. Click **Add Person**. The Person Information screen appears. Fran's first and last names prefill the appropriate fields.
8. Click **Save**. The system saves your work and returns to the Employee Information screen.
9. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Employee ID [County]	FAM##	This field is for county IDs only and accepts up to 12 characters, both alpha and numeric.
Email Address	Ohio SACWIS_TRAINING@ odjfs.state.oh.us	
Hire Date	Today's date	

10. Click **Apply**.

Result The system saves your work without leaving the Employee Information screen.

Task 15. Define Fran's job
Use the Job Details screen to define Fran's job as a caseworker in the Ongoing Unit.

1. Click **Add Job** and complete the following fields on the Job Details screen:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	
County	Franklin County	
Agency	Franklin County Children Services Board	
Unit	Ongoing Unit##	Double-check the two digits at the end of the unit name: be sure that you're selecting *your* unit and not someone else's!
Supervisor	Black##, Chris	
Job Title	Case Worker	

2. Click **Save**.
3. Click **Save** again.

Result The system saves your work and returns to the Employee Search screen.

Task 16. Assign Fran to a user group

Assign Fran to the Worker group.

1. Click the **Security** tab.
2. In the menu on the left, click **Assign User Groups**. A User Search screen appears.
3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Agency	Franklin County Children Services Board	
Last Name	Miller##	

4. Click **Search**.
5. Find Fran's name in the search results and click the **edit** link beside it. The User Details screen appears.
6. Click **Add User Groups**. The User Group Search screen appears.
7. Click **Search**. The system lists all the state-defined user groups.
8. Select the Case Worker user group. (This user group appears on page 2 of the search results.)
9. Click **Save**. The system saves your work and returns to the User Details screen. With this assignment, you've given Fran the set of permission she needs to do her job as a caseworker.
10. Click **Save**.

Result The system saves your work and returns to the User Search screen. You have created the county hierarchy for this small office and completed this exercise.

Exercise SA-2. Create a user group

Scenario

In the previous exercise, you learned to assign users to user groups. The user groups are defined at the state level, and you cannot modify these state-defined user groups. However, you can copy a state-defined user group and modify the copy in order to create a customized user group for your agency.

Bruce Watson is a caseworker in the Ongoing Unit. Crystal, his supervisor, wants Bruce to work with IV-E reimbursements. The state-defined Caseworker user group does not provide the permissions he will need to do fiscal work. Create a new user group that adds the necessary profiles for IV-E work to the Caseworker profile.

Tasks

- Task 1. Create a new group
- Task 2. Add profiles
- Task 3. Assign Bruce to the new group

Task 1. Create a new group
Create the new group by copying and modifying the state-defined Caseworker group. Name the new group and write a brief, specific description.

1. In the menu on the left, click **User Groups**. The User Groups Search screen appears.
2. In the **Type** field, select State Defined.
3. Click **Search**. The system displays a list of all state-defined user groups. (Notice that the list covers more than one page.)
4. Find the Caseworker user group and click the **copy** link beside it. The User Group Details screen appears. The Profiles table lists the default security profiles for the Caseworker user group.
5. In the **Type** field, select Agency-Defined.
6. Select Franklin County Childrens Services Board in the **Agency** field.
7. In the **Name** field, type *Fiscal*## after Caseworker.
8. In the **Description** field, remove existing text and type: *This group is based on the Caseworker group. It keeps the standard caseworker security profiles and adds profiles to cover IV-E financial work.*

Note
User group names should be detailed and specific. Some Ohio SACWIS screens show the user group name but not the description, so the name alone should clearly identify the function of the group.

Result You've named and described your new group. Notice that the description identifies the user group you copied and states the purpose of the new group: this information is critical to effective long-term management of user groups.

Task 2. Add profiles

The rights of a user group are defined by the profiles associated with it. To give the Caseworker/Fiscal user group permissions for IV-E fiscal tasks, add the appropriate profiles.

1. On the User Group Details screen, click **Add Profile**. The Profile list screen appears.
2. In the **Category** field, select Financial.
3. Click **Filter**. The system lists the Financial security profiles.
4. Select the following profiles:
   - Agency_Fiscal_Worker on disburse payment (FM14)
   - Agency_Fiscal_Worker on FM13
   - Agency_Fiscal_Worker on FM15
5. Click **OK**. The system returns to the User Group Details screen. If you scroll down the list, you will see the profiles you just added.
6. Click **Save**.

Result The system saves your work and returns to the User Groups Search screen.

Note

The Profile list screen also lets you remove profiles from a user group. Remove a profile from a user group by clicking the profile's **delete** link in the right-hand column of the Profiles table.

Task 3. Assign Bruce to the new group

Go to the User Details screen and assign Bruce to the Caseworker/ Fiscal user group.

1. In the menu on the left, click **Assign User Groups**. The User Search screen appears.
2. In the **Agency** field, select Franklin County Children Services Board.
3. In the **Last Name** field, select Watson##.
4. Click **Search**.
5. Find Bruce and click **edit** beside his name. The User Details screen appears.
6. Click **Add User Groups**. The User Groups Search screen appears.
7. In the **Type** field, select Agency Defined.
8. Click **Search**. The system lists the user groups defined specifically for your agency.
9. Select the **Caseworker/Fiscal##** user group.
10. Click **Save**. The system saves your work and returns to the User Details screen.
11. Click **Save**.

Result The system saves your work and returns to the User Search screen. You have completed this exercise.

Exercise SA-3. Set up a new employee

Scenario

When a new employee is hired, the system administrator must perform a series of tasks to enter information about the employee into the system. These tasks enable the new employee to use the system, and they enable his or her supervisor to perform necessary supervisory tasks.

In this exercise you play the role of a system administrator in a county agency that has just hired a new employee named Roberto Alvarez. Create person and employee records for Roberto, set him up as a user in the system, and assign him to appropriate user groups.

Tasks

- Task 1. Search for existing records for Roberto
- Task 2. Add a person record
- Task 3. Record address and contact information
- Task 4. Record demographic and educational information
- Task 5. Record employment history
- Task 6. Record administrative information
- Task 7. Record Roberto's LISW license
- Task 8. Create a user
- Task 9. Assign Roberto to a user group

Task 1. Search for existing records for Roberto

Search for employee and person records for Roberto.

1. Click the **Staff** tab.
2. Click the **Maintain Staff** link. The Employee Search screen appears.
3. Complete the following fields to search for an employee record:

Field Name	Information to Enter/Select	Notes
Last Name	Alvarez##	
First Name	Roberto	

4. Click **Search**. The system does not find an employee record for Roberto.
5. Click **Add Employee**. The Person Search screen appears. Type Roberto's first and last names again in the appropriate fields.
6. Click **Search** to search for a person record.

Result The system does not find a person record for Roberto.

Task 2. Add a person record
Use the Person Information screen to enter basic information about Roberto, including his name, gender, age, and Social Security number.

1. Click **Add Person**. The Person Information screen appears. Roberto's first and last names prefill the appropriate fields.
2. Complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
First Name	Roberto	
Last Name	Alvarez##	
Gender	Male	
SSN	277-##-8963	
Date of Birth	11/06/1978	
Birth City	Washington D.C.	
Birth Country	USA	

3. Click **Apply** to save your work without leaving this tab.

Result You've created a person record for Roberto.

Task 3. Record address and contact information

Most personal contact information—physical address, phone numbers, and email addresses—is recorded on the **Address** tab.

1. Click the **Address** tab.
2. Click **Add Address**, and complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
Address	900## E. Glendale Dr.	
City	Columbus	
State	OH	(system default)
Zip	45220	
Address Type	Residence	
Effective Date	02/02/2003	

3. Click **Search**. The system does not find the address.
4. Click **Add New Address**.
5. Click **Save**.
6. Click **Add Phone/Email**, and complete the following fields:

Field Name	Information to Enter/Select	Notes
Type	Home	
Primary	Select this check box	
Phone/Email	513-255-4687	
Description	Calls roll to cell phone after 4 rings.	

7. Click **Save**. The system saves your work and returns to the **Address** tab. Information about Roberto's home phone is now displayed on this tab.
8. Click **Apply**.

Result The system saves your work without leaving the **Address** tab.

Task 4. Record demographic and educational information
Use the **Demographics** and **Add'l** tabs to record information about Roberto's race, ethnicity, religion, languages, marital status, and education.

1. Click the **Demographics** tab.
2. Complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
Race	White	
Available Language	Spanish/English Bilingual	

3. Click **Apply** to save your work.
4. Click the **Add'l** tab.
5. In the **Highest Level of Education** field, select Masters Degree.
6. Click **Apply**.

Result The information you've entered on both tabs has been saved. The information about education, gender, languages, race, and ethnicity is also displayed on the **Demographics** tab in the Maintain Staff screens.

Task 5. Record employment history

To record Roberto's employment history:

1. Click the **Employment** link. The Employment History screen appears.
2. Click **Add Employment** and complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
Begin Date	03/19/2001	
End Date	01/31/2006	
Employer	Remedia Behavioral Health Systems	

3. Click **Save**.
4. Click **Close**.

Result The system saves your entries and returns to the Employee Search screen.

Task 6. Record administrative information

Enter general administrative information such as Roberto's ID number, hire date, and supervisor.

1. Type *Alvarez##* in the **Last Name** field (if it's not prefilled).
2. Click **Search**. The system does not find an employee record for Roberto. (We have only added him as a person so far).
3. Click **Add Employee**. The Person Search screen appears.
4. Type Roberto's first and last name again in the appropriate fields.
5. Click **Search** to search for a person record.
6. Find Roberto's row in the search results and click his **select** link. The Employee Information screen appears.
7. Complete the following fields on the **Basic** tab:

Field Name	Information to Enter/Select	Notes
Employee ID [County]	8444	
Email Address	Ohio SACWIS_TRAINING @odjfs.state.oh.us	
Hire Date	Today's date	

8. Click **Apply**.
9. Click **Add Job** and complete the following fields on the Job Details screen:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	
County	Franklin	
Agency	Franklin County CSB	
Unit	Children Services Unit	
Supervisor	Weaver##, Sam	
Job Title	Training Administrator	

10. Click **Save**.

Result The system returns to the **Basic** tab. A new row has been added to the Current Job table, based on the information you just entered.

Task 7. Record Roberto's LISW license
Roberto is a Licensed Independent Social Worker. Professional licenses are recorded in the system, but they are not part of the employee's person profile.

1. Click the **Licenses** tab.
2. Click **Add License**, and complete the following fields:

Field Name	Information to Enter/Select	Notes
License Name	Social Work	
License Number	W9189914	
License Type	Licensed Independent Social Worker	
Start Date	08/01/2005	
End Date	07/31/2007	

3. Click **Save**.
4. Click **Save** again.

Result The system saves the information and returns you to the Employee Search screen.

Task 8. Create a user

You must obtain an InfoSec ID for new users before you can create them in the system. For purposes of the current scenario, we'll assume that you've already gone through the process of getting an InfoSec ID for Roberto.

1. Click the **Security** tab.
2. Click **Maintain User**. The User Search screen appears.
3. Type Roberto's InfoSec ID, *alvarr*##, in the InfoSec ID field and click **Search**. (Roberto's name appears on page 4 of the search results.)
4. Click the **edit** link for Roberto. The User Details screen appears.
5. Complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
InfoSec ID	alvarr##	
Access Start Date	Today's date	

6. Click **Save**.

Result The system saves your entries and returns to the User Search screen.

Task 9. Assign Roberto to a user group

As a worker in the foster care unit, Roberto needs to be assigned to the user group for the foster care unit.

1. In the menu on the left, click **Assign User Groups**. A User Search screen appears.
2. In the **Agency** field, select Franklin County Children Services Board.
3. In the **Last Name** field, type *Alvarez*##.
4. Click **Search**.
5. Find Roberto and click his **edit** link. The User Details screen appears.
6. Click **Add User Groups**. The User Groups Search screen appears.
7. In the **Type** field, select Agency Defined.
8. Click **Search**. The system lists the user groups defined specifically for your agency.
9. Select the **Worker User Group**.
10. Click **Save**. The system saves your work and returns to the User Details screen.
11. Click **Save**.

Result The system saves your work and returns to the User Search screen. You have completed this exercise.

Exercise SA-4. Perform other basic system administration tasks

Scenario

In this scenario, you'll perform a variety of real-world tasks such as modifying information about your users, handling broadcast communications, and maintaining data integrity. Some tasks are much more common than others in the real world, but all use basic system functions that you need to know.

Tasks

- Task 1. Suspend a user's access to Ohio SACWIS
- Task 2. Merge duplicate person records
- Task 3. Associate companion cases
- Task 4. Send a broadcast message
- Task 5. Delete broadcast messages
- Task 6. Remove a user from the system
- Task 7. Modify a tickler template

Task 1. Suspend a user's access to Ohio SACWIS

Yesterday, a disgruntled employee named Bruce Watson got into an argument with his supervisor, Sam Weaver, and stormed out. The employee isn't at work today, and the supervisor asks you to temporarily suspend his access to the system.

1. From the User Search screen, complete the following fields and click **Search**:

Field Name	Information to Enter/Select	Notes
Agency	Franklin	
Last Name	Watson##	

2. In the search results, click the **edit** link beside Bruce's name. The system displays the User Details screen.
3. Select the **Suspended Access** check box.
4. In the Comments field, type *Access denied, employee left agency*.
5. Click **Save**.

Note

To restore the user's access rights, all you have to do is to uncheck this box.

Result The user's access rights are completely and immediately suspended, and the system returns to the User Groups screen. (If a user is logged in when his or her access is suspended, the suspension will not take effect until they log out. In other words, suspension won't interrupt a session in progress.)

Task 2. Merge duplicate person records

A caseworker sends you an email: she just discovered two person records for the same individual. Most caseworkers don't have the authority to merge records in the database, so she is asking you to take care of the problem.

The two person records are under slightly different names: Sara Fast vs. Sarah Fast. The former record—the one for Sara Fast—has the correct spelling of Sara's first name, and all of the information is accurate except her phone number and social security number, so that is the record you are going to retain.

Note

The caseworker should determine which data to retain and which to remove.

1. Click the **Utilities** tab.
2. In the menu on the left, click **Merge Person**. The Merge Person screen appears.
3. In the Retain Person area, click **Search Person**. The system displays the Person Search screen.
4. Complete the following fields and click **Search**:

Field Name	Information to Enter/Select	Notes
Last Name	Fast##	
First Name	Sara	

5. Click the **select** link beside Sara's name in the search results. The system returns to the Merge Person screen and displays Sara Fast in the Retain Person Area.
6. In the Remove Person area, click **Search Person**. The system displays the Person Search screen.
7. Repeat steps 3–4 with the alternate spelling, "Sarah Fast." When you select "Sarah Fast," The system returns to the Merge Person screen and displays Sarah in the Remove Person area.
8. Click **Compare Records**. In the Person Record Comparison table, the system displays the fields that have contradictory information. You must select the value you want to keep in each field.

9. Select the following values:

Field Name	Information to Enter/Select	Notes
Person ID	Select the ID number associated to Sara Fast.	
Name	Fast##, Sara	
Social Security Number	258-##-3232	
Phone Number	614-259-8822	

10. Click **Merge**. The system merges the records and displays a confirmation message.
11. Click **Close**.

Result The system merges the records and displays a confirmation message. The unwanted record is no longer visible to system users. However, it still exists in the database and can be retrieved if necessary.

Task 3. Associate companion cases

Another caseworker calls to let you know that she has found a duplicate record for a case she is working on. One case is under the name Debbie Waite, and the other is under the name Samuel Waite.

Unlike a duplicate person record, a duplicate case is not removed from the system. Instead, the duplicate is associated, or linked, with the primary case. Once the two have been linked, the duplicate case is frozen: you can view it but you can't change it or link it to other intakes or cases.

The duplicate case must be closed before you can perform the steps below. In this situation, the caseworker has already closed the duplicate case.

Note

Don't confuse a *duplicate case* with a *companion case*. A companion case is an active, working case that is associated with another case, intake, and so on. You can use the steps here to create a companion case: simply select Companion Case in the **Type of Association** field.

1. In the menu on the left, click **Associate Case**. The Associate Case screen appears.
2. In the Primary Case area, click **Search Case**. The system displays the Case Search screen.
3. Type *Waite*## in the **Case Last Name** field and click **Search.**
4. Find the case for Debbie Waite in the search results and click its **select** link. The system returns to the Associate Case screen and displays case information in the Primary Case area.
5. In the Associated Case area, click **Search Case**. The system displays the Case Search screen.
6. Type *Waite*## in the **Case Last Name** field and click **Search.**
7. Find the case for Samuel Waite in the search results and click its **select** link. The system returns to the Associate Case screen and displays case information in the Associated Case area.
8. In the **Type of Association** field, select Companion.
9. Click **Associate Cases**.
10. Click **Cancel**. The system displays a confirmation message to confirm that you want to cancel the task.
11. Click **OK.**

Result The companion cases are linked; they both are active cases and remain open.

Task 4. Send a broadcast message

To notify all the county workers, create a broadcast message. The message should be sent on Wednesday morning and should disappear at 9 a.m. on Saturday.

1. Click the **Maintenance** tab.
2. Click the **Broadcast Message** link.
3. Ensure that your login agency is displayed in the **Agency** field, then click **Search**.
4. Click **Add Broadcast Message**.
5. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	
Start Time	08:00 AM	
End Date	One week from today's date	
End Time	09:00 AM	
Message	Maintenance will be scheduled on Saturday and there will not be any access.	

6. Click **Save** to schedule the message. The system saves your work and returns to the Broadcast Messages screen.
7. Click the **Home** tab.

Result Your new message is displayed within the message board area.

Task 5. Delete broadcast messages
As an Administrator you are going back into SACWIS to delete a couple of old broadcast messages.

1. Click the **Administration** tab.
2. Click the **Maintenance** tab.
3. In the menu on the left, click **Broadcast Message**. The Broadcast Message Search screen appears.
4. Click **Search**. The system reorders the search results to display the oldest message first.
5. Click the **delete** link beside the message you just created. The system asks you to confirm your decision.
6. Click **OK** to delete the message. The system returns to the Broadcast Message Search screen. The deleted message will disappear from the Home screen the next time the screen is refreshed.

Result You have deleted the broadcast message from the system.

Note

When you terminate an employee's access, the system sends a message to the employee's supervisor, telling him or her to reassign any work items assigned to this employee.

Task 6. Remove a user from the system

Jane Adams, who has been the Ongoing Supervisor at your agency, is retiring today. She left earlier in the afternoon after her party. It's now the end of the day, so terminate Jane's access to the system.

1. Click the **Staff** tab.
2. Click the **Maintain Staff** link. The Employee Search screen appears.
3. Type *Adams*## in the **Last Name** field and click **Search**.
4. In the search results, click the **edit** link beside Jane's name. The system displays the Employee Information screen for Jane.
5. Select the **Termination** check box and, in the field on its right, type today's date (the effective date of the termination).
6. Click **Save**. All of Jane's access rights to the system are completely and immediately revoked at this point. The system returns to the Employee Search screen.

Result You have suspended Jane's access to the system. The system has removed her from the user groups to which she belonged.

Task 7. Modify a tickler template

The system contains a set of state-defined ticklers. You cannot modify these ticklers, but you can copy them and modify the copy to create customized ticklers for your own agency. Copy the template Assessment/Investigation Worker in Maintain Ongoing, and reduce the intervals for escalation and due days.

1. Click the **Maintenance** tab.
2. In the menu on the left, click **Ticklers**. The Tickler Template Search screen appears.
3. In the **County** field, select Franklin.
4. Click **Search**. The system displays a list of templates.
5. Select any tickler template and click the **copy** link beside it. The Tickler Template screen appears.
6. Change the following fields:

Field Name	Information to Enter/Select	Notes
Task Type	Case Disposition	
Display Days	10	
1st Escalation Days	2	You can shorten the escalation interval, but you cannot make it longer than set by the state.
2nd Escalation Days	0	
Due Days	25	
Reason for Change	Director requested that tickler be modified to reduce the escalation interval.	

7. Click **Save**.

Result The system saves your work and returns to the Tickler Template Search screen. You have completed this exercise.