

Knowledge Base Article

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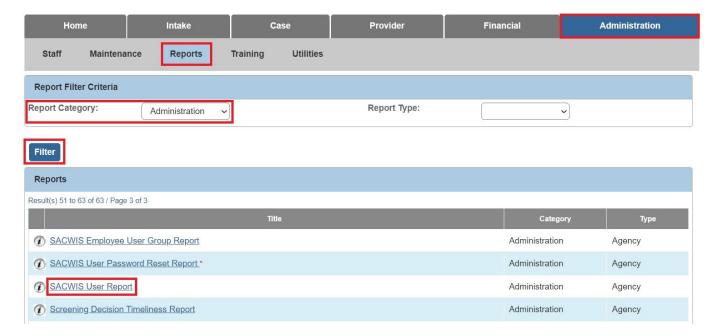
Overview

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

Generating the SACWIS User Report

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

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



The **Report Details** page appears.

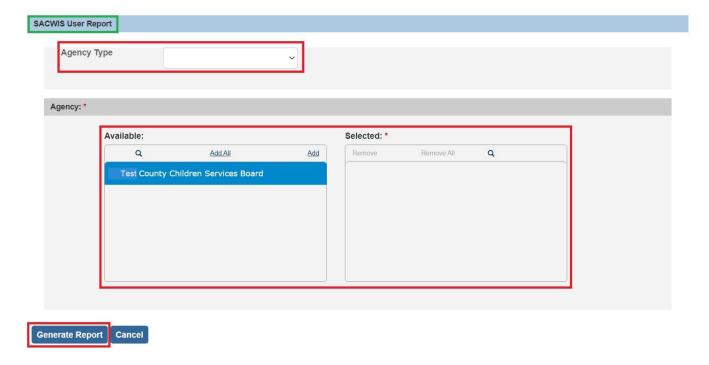
- 5. Choose the report format by clicking the radio button next to **PDF** or **Excel**.
- 6. Click the **Generate Report** button.

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The SACWIS User Report screen appears.

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





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

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

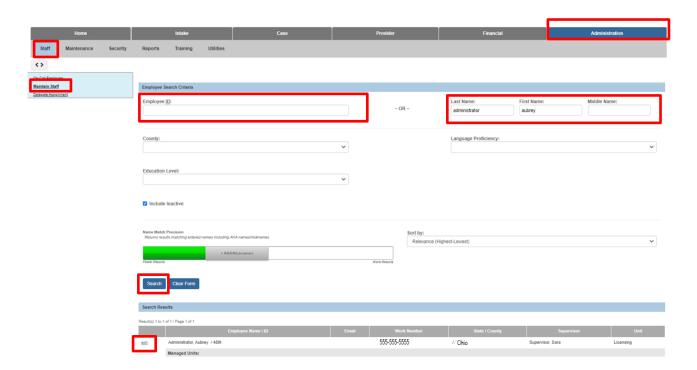
User Access Reconciliation

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

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

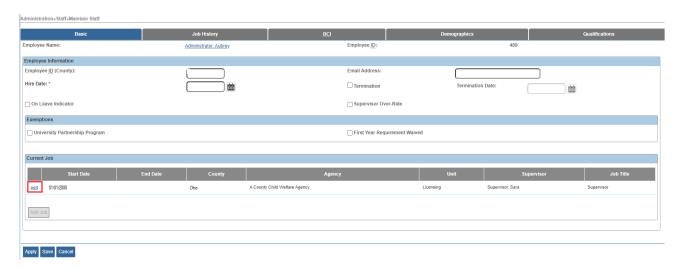
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The Maintain Staff page appears.

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



The Maintain Staff page appears.

- h. Enter an **End Date** for the position.
- Click Save.



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



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

Troubleshooting

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

Terminating a Supervisor in Ohio SACWIS

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

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



Save Cancel

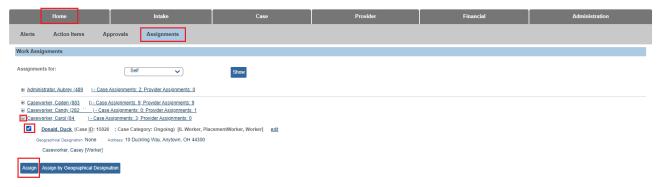
Assigning a Different Worker to a Case

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

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

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The list of employees will appear.

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



The Employee Assignment page appears.

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



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



The Employee Assignment page appears.

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





Changing a Case or Provider Activity Log from Draft to Completed

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

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

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

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

If you have additional questions pertaining to this Deployment Communication, please contact the Customer Care Center.

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