Ohio | Department of Job and Family Services

Staff Management

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

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.

Also: Reports cannot be generated in the training region. To become familiar with location and steps for accessing; please follow steps for accessing reports presented in the exercises. When the hour glass appears, click on "cancel".

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Exercise SM-1. Perform Administrative Tasks for a New Employee

Scenario

A new employee, Samantha Bugner, is starting today. The system administrator in your office has already created a record for Samantha in the system, obtained an InfoSec ID, and assigned her security permissions. You can create a training plan for her, and when she's ready, assign work items.

Tasks

Task 1. Create a training plan

Task 2. Assign a case to Samantha

Task 3. Assign Samantha to on-call duty

Task 1. Create a training plan

All new direct service workers are required to complete a predefined sequence of courses during their first year. Set up Samantha's plan.

1. On the Ohio SACWIS Home screen, click the **Administration** tab.
2. Click the **Training** tab.

3. In the menu on the left, click the **Plans** link. The Employee Search screen appears.
4. In the **Last Name** field, type *Bugner##*.

5. Click **Search**. The system displays Samantha's record.
6. Click the **select** link for Samantha. The Training Plan History screen appears.

7. Click **Add Training Plan**. The Training Plan Details screen appears.

8. Complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
Name	Year 1 Training Plan	
Start Date	Today's date	
End Date	Date one year from today	
Comments	Standard first year plan	
Status	Open	

9. Click **Apply** to save the new plan.

10. Click **Add Competencies**. The system displays the Competency Area Search screen. Next, you need to display training classes for the core competencies your county has defined for caseworkers.

11. Complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
Category	Core Competencies	
Agency	Franklin County	
Type	Case worker	
Source	OCWTP	

12. Click **Search**. The system displays the core competency areas your agency has defined for caseworkers.

13. Click the check boxes for the three competency areas numbered 100 to 102.

14. Click **Select**. The system returns to the Training Plan Details screen, where the three areas are displayed in the Competencies table.

15. Click **Save**.

Result The system saves the training plan and displays it on the Training Plan History screen.

Task 2. Assign a case to Samantha
Take a case that's assigned to the caseworker Crystal Quartz and assign it to Samantha.

1. Click the **Home** link in the header links. Then click **OK**. The system returns to the Home screen.

2. On the Ohio SACWIS Home screen, click the **Assignments** tab.

3. Click **Quartz##, Crystal** to display the work items currently assigned to her.

4. Click the check box next to Hackman, Glenda, to select the work item.

5. Click **Assign**. The system displays the Assign Work Item screen.

6. Find your Bugner##, Samantha in the Employees table and click the **select** link on her row. The Employee Assignment screen appears.

7. Complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	
Comments	Review the safety hazards for this case!	
Roles	Worker	

8. Click **Save**.

Result The system saves your work and returns to the **Assignments** tab. You've assigned the Hackman case to Samantha.

Task 3. Assign Samantha to on-call duty
Several of the senior workers are about to take vacations. Samantha is an experienced worker, so assign her to on-call duty over the upcoming weekend.

1. Click the **Administration** tab.

2. Click the **Staff** tab.

3. In the menu on the left, click **On-Call Employee**. The On-Call Employee Search screen appears.

4. Click **Search**. Samantha does not appear in the search results. (After searching for existing On-Call Employee's, the County field name will be highlighted. Click off to the side of the screen to remove the highlighting. This is a defect in the training database and will work properly in production.)

5. Click **Add On-Call Employee**. The Employee Search screen appears.

6. Type Bugner## in the **Last Name** field and click **Search**.

7. Find Samantha's name in the search results and click her **select** link. The On-Call Employee Details screen appears.

8. Complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
Start Date	The next Friday after today's date	Use the calendar control for this field to select the next Friday.
Start Time	5:00 PM	
End Date	The first Monday after the start date you selected above.	Use the calendar control for this field to select the next Monday.
End Time	8:00 AM	
Phone	513-255-4687	

9. Click **Save**. Click off to the side of the screen as the County field is highlighted in the training database.

Result The system saves the on-call assignment and returns to the Employee Search screen. You have completed this exercise.

Note
Use the first four steps of this task to view a list of on-call employees. You can edit a worker's existing on-call assignments by using the **edit** link in his or her row.

Exercise SM-2. Manage Your Staff and Workload

Scenario

It's a busy day for you and your group. In addition to the normal work you handle, such as assigning and approving work items, one of your employees is about to start maternity leave. At the end of the day, you're leaving for a week of well-deserved vacation, and you need to delegate your work to another supervisor before you go. You'll perform the tasks below to manage the events of the day in Ohio SACWIS.

Tasks

Task 1. Assign a case to another supervisor

Task 2. View and process work items awaiting approval

Task 3. View the ticklers for one of your workers

Task 4. Reassign work from one worker to another

Task 5. Place an employee on leave

Task 6. Delegate your assignments to another supervisor

Task 1. Assign a case to another supervisor

An assessment/investigation has been completed for a CA/N report for a family named Irish. Ongoing work is required, so transfer the Irish case to the Ongoing supervisor, Crystal Quartz##.

1. Click the **Home** link in the header links. Then click **OK**. The system returns to the Home screen.

2. On the Ohio SACWIS Home screen, click the **Assignments** tab.

3. Click **Lake##, Brandy** to display the work items currently assigned to her.

4. Click the check box next to Irish, Hannah.

5. Click **Assign**. The Assign Work Item screen appears.

6. Find Quartz##, Crystal in the Employees table and click the **select** link on her row. The Employee Assignment screen appears.

7. Complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	Date should be prefilled.
End My Assignment	Select this check box	
Roles	Supervisor	

8. Click **Save**.

Result The system makes the assignment and returns to the Work Assignments screen. The case has been removed from Brandy's (your) assignment list and now appears in Crystal's.

Note

The Assign Work Item screen displays work items for one agency at a time. Use the **Agency** field to pick the appropriate agency.

Task 2. View and process work items awaiting approval
Check to see if any items are waiting for your approval and approve them as directed.

1. Click the **Approvals** tab. The system displays all pending approvals. Items are organized by categories.

2. Click the **Safety Assessment** link.

3. Click the link for the Cindy Rush assessment. The Safety Assessment Details screen appears.

4. After reviewing the safety assessment, click **Validate for Approval** on the **Safety Response** tab. The system displays a message confirming that the assessment is ready to process for approval.

5. Click **OK**. The system returns to the Safety Response screen.

6. Click **Process for Approval**. The Process Approval screen appears.

7. In the **Action** field, select Approved - Final.

8. Click **Save**.

Result The system saves your work and displays the Safety Assessment list screen.

Task 3. View the ticklers for one of your workers
Look at Brandy Lake's ticklers.

1. Click the **Home** link in the header links. Then click **OK**. The system returns to the Home screen.

2. Click **view all ticklers**. (It's on the right side of the screen, just below the tabs.) The system displays the Ticklers screen.

3. Click **Case**. The system displays a link for Sam Weaver.

4. Click **Weaver##, Sam**. The system displays a list of Sam's ticklers. At the bottom of this list are the names of the supervisors who report to Sam.

5. Scroll down until you see Lake##, Brandy.

6. Click Brandy's name.

Result You will not see any ticklers for Brandy Lake.

Note You can view all of your employee's ticklers on the Ticklers screen.

Task 4. Reassign work from one worker to another

Please skip this task

Louise Burch, a long-time employee, is retiring tomorrow. You are going to reassign her work to another worker on your staff, Sally Brown.

1. Scroll up to the top of the Ticklers screen and click the **Assignments** tab.

2. Click **Lake##, Brandy** (she's Louise's supervisor). The system displays a list of work items assigned to Brandy. Below the list are links for Brandy's staff.

3. Click the link for **Burch##, Louise** to display the work items currently assigned to her. Louise only has one assignment: a case for Evelyn Spring.

4. Click the check box next to the Spring case, then click **Assign** at the bottom of the screen. The system displays the Assign Work Item screen.

5. Find Brown##, Sally O. in the Employees table and click the **select** link on her row. The Employee Assignment screen appears.

6. Complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
Start Date	02/01/2006	
Comments	Louise is retiring and her cases are being reassigned.	
Role (column)	Assessment/Investigation Worker	Click the check box next to this role

7. Click **Save**. The system returns to the **Assignments** tab.

8. Find Louise Burch again and click the **edit** link beside the Evelyn Spring case. The Employee Assignment screen appears.

9. In the **End Date** field, type *02/01/2006*.

10. Click **Save**. The system saves your work and returns to the Work Assignments screen.

11. Click **Brown, Sally** to view her assignments.

Result The case for Evelyn Spring is now displayed in Sally's assignments. You've successfully reassigned the case.

Task 5. Place an employee on leave
Ima Lister, who is about to have her first child, is taking 12 weeks of leave under the Family and Medical Leave Act (FMLA) starting today. As a security measure, a user's access rights should be suspended when he or she is on leave. Use the Employee Information screen to indicate that Ima is on leave.

1. Click the **Administration** tab.

2. Click the **Staff** tab.

3. Click **Maintain Staff**. The Employee Search screen appears.

4. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Last Name	**Lister##**	
First Name	**Ima**	

5. Click **Search**. Ima's record is displayed in the search results.

6. Click the **edit** link for Ima. The Employee Information screen appears.

7. Select the **On Leave Indicator** check box.

8. Click **Save**.

Result The system returns to the Employee Search screen. Ima's access rights have been suspended.

Note To restore Ima's access rights (she is currently in "inactive" status): Perform an employee search. Be sure to check the "Include Inactive" check box near the Language Proficiency area to the right when you perform the search. After you perform the search, you click on the edit link beside the correct employee and clear the On Leave Indicator check box.

Task 6. Delegate your assignments to another supervisor
It's late afternoon on Friday. You're about to leave the office and start your vacation. Before you go, however, delegate your assignments to the Ongoing supervisor, Crystal Quartz.

1. In the menu on the left, click the **Delegate Assignment** link. The Current Delegates screen appears. This is the first time you've delegated your work in the system, so your Current Delegates list is empty. You'll have to designate Crystal as a delegate before you can transfer your assignments to her.

2. Click **Add Delegate**. The Delegate Search screen appears.

3. Complete the following fields and click **Search**:

Field Name	Information to Enter/Select	Notes
Last Name	*Quartz##*	
First Name	*Crystal*	

4. Find Crystal's name in the search results and click the **select** link on the line for the ongoing unit. The Delegate Details screen appears.

5. Now that you've defined Crystal as your delegate, you have to define the time period for which you're delegating your assignments to her. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	
End Date	One week from today	

6. Click **Save**. The system saves your work and returns to the Current Delegates screen.

Result Crystal can now view your assignments on the Work Assignments screen by selecting your name in the **Assignments for** field and clicking **Show**. You have completed this exercise.

Exercise SM-3. Waive Training Requirements and Update Training Plans

Scenario

In this exercise, you'll perform several basic tasks to manage the training plans of some of your staff members.

Tasks

Task 1. Waive first-year training requirements

Task 2. Modify Samantha's training plan

Task 3. Record participation in the University Partnership program

Task 4. Record completion of competency requirements

Task 1. Waive first-year training requirements

In a previous exercise, you created a training plan for Samantha Bugner and prescribed the core competencies your agency has defined. Samantha was employed by another county approximately two years ago and you have received verification of the core trainings she has attended. You need to waive the required first-year courses and schedule her for other classes.

1. Click the **Maintain Staff** link. The Employee Search screen appears.

2. Type *Bugner##* in the **Last Name** field.

3. Click **Search**.

4. Find Samantha's name in the search results and click the **edit** link in her row. The system displays the Employee Information screen.

5. In the Exemptions area, select **First Year Requirement Waived**.

6. Click **Save**.

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

Task 2. Modify Samantha's training plan
Remove the current competency areas and add the areas in which you want Samantha to get training.

1. Click the **Training** tab.

2. Click the **Plans** link. The Employee Search screen appears.

3. Type *Bugner##* in the **Last Name** field.

4. Click **Search**.

5. Select Samantha in the search results. The system displays the Training Plan History screen.

6. Click the **edit** link for Samantha's plan. The Training Plan Details screen appears.

7. Delete competencies 100 through 102 by clicking the **delete** link and then **OK** on each row.

8. Click **Apply** to save your changes.

9. Click **Add Competencies**. The Competency Area Search screen appears.

10. Complete the following fields as shown:

Field Name	Information to Enter/Select	Notes
Category	Core Competencies	
Agency	Franklin County Children Services Board	
Type	Case worker	
Source	OCWTP	

11. Click **Search**. The system displays a list of specialized competency areas.

12. Select the following competency areas:

- 309-1 New Drugs of Choice
- 309-2 Recognition of Meth Labs & Their Danger

13. Click **Select**. The system returns to the Training Plan Details screen and displays your selections in the Competencies table.

14. Click **Save**.

Result The system saves the changes you've made to Samantha's training plan and returns to the Training Plan History screen.

Task 3. Record participation in the University Partnership program
Chris Mast is planning to take work-related courses at a near-by college this year through the University Partnership program. The outside courses will not be recorded in Chris's training plan (you would record them in the Education section of his person profile after completion). They will, however, count towards the 36 hours of training he's required to take, so record Chris's participation in the University Partnership program.

1. Click the **Staff** tab.

2. Click the **Maintain Staff** link. The Employee Search screen appears.

3. In the **Last Name** field, type ***Mast##***.

4. Click **Search**.

5. Click **edit** next to Chris in the search results. The Employee Information screen appears.

6. In the Exemptions area, select **University Partnership Program**.

7. Click **Save**.

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

Task 4. Record completion of competency requirements

Let's imagine that months have passed since you created Samantha Bugner's training plan, and she has successfully completed both competency requirements. Update her training plan in the system and close the plan. (Closing the plan indicates that Samantha has met all of its requirements.)

1. Click the **Training** tab.

2. Click the **Plans** link. The Employee Search screen appears.

3. In the **Last Name** field, type *Bugner##*.

4. Click **Search**. The system displays Samantha's record.

5. Select Samantha. The Training Plan History screen appears.

6. Click the **completion** link beside her training plan. The Course Completion screen appears.

7. Select competency number 309-1 by clicking the check box in its row, and complete the following fields in the Course Details area:

Field Name	Information to Enter/Select	Notes
Course Title	New Drugs of Choice	
Start Date	First working day of the month 6 months from today's date	Enter slashes in the date.
End Date	Four working days from the start date	Enter slashes in the date.
Course Provider Name	ODJFS	
Credit/Contact Hours	16	
Course Instructor Name	R. Allen	
Hours Type	Contact	

8. Click **Save**. The system displays a message: "Do you really want to save this record?"

9. Click **OK**. The system saves your work and returns to the Training Plan History screen.

10. Click the **completion** link again.

11. Select competency number 309-2 and complete the following fields:

Field Name	Information to Enter/Select	Notes
Course Title	Recognition of Meth Labs & Their Danger	
Start Date	First working day of the month 6 months from today's date	Enter slashes in the date.
End Date	Four working days from the start date	Enter slashes in the date.
Course Provider Name	ODJFS	
Credit/Contact Hours	16	
Course Instructor Name	A. Morris	
Hours Type	Contact	

12. Click **Save**. The system displays a message: "Do you really want to save this record?"

13. Click **OK**. The system saves your work and returns to the Training Plan History screen. You've recorded Samantha's completion of both competency requirements. You still need to close this training plan, however.

14. Click the **edit** link for the plan. The Training Plan Details screen appears.

15. In the Status field, select **Closed** to show that all requirements for this training plan have been satisfied.

16. Click **Save**.

Result The system saves your work and returns to the Training Plan History screen. You have completed this exercise.

Exercise SM 4. Make a Screening Decision & Route an Intake

Scenario

In this exercise, you'll play the role of a screening decision maker. An intake screener has completed an intake for Loretta Baccus and her daughters. Review the intake, and decide whether it will be screened in for agency intervention and/or services. Screen in the intake and route it to the Assessment/Investigation Supervisor, adding comments for the caseworker in the process.

Tasks

Task 1. Review the intake and record the screening decision

Task 2. Create a case

Task 3. Route the case to the Assessment/Investigation supervisor

Task 1. Review the intake and record the screening decision
Your first task is to open the intake and review the information the screener has entered.

1. Click the **Intake** tab so you can view the intake workload.

2. In the **Status** field, select Completed.

3. Click **Filter**. Only completed intakes are now displayed in the workload list.

4. Find the CA/N intake screened by Sam Weaver## that is dated 05/04/2006 at 1:02 PM and click on its **decision** link. The Decision Details screen for the intake appears.

5. Write down the intake ID number: ________________________

6. Review the information on each tab, and then return to the **Decision** tab (the Decision Details screen).

7. Complete the following fields with the data provided:

Field Name	Information to Enter/Select	Notes
Is This an Emergency?	No	If you select Yes, the field **Response Time for Initiation** is automatically populated.
Screening Decision	Screened In	
Date & Time of Screening Decision	05/04/2006 1:15 PM	

8. Click **Save**. The system displays a message: "Saving the Screening Decision will invoke 'Post-Screening Decision' edit rules. To continue, click OK."

9. Click **OK**. Ohio SACWIS saves your decision and returns to the Intake Workload screen.

10. In the **Status** field, select Screened In.

11. Click **Filter**.

Result The intake you just screened in will be at or near the top of the list, since the intakes are displayed in descending order of Status Date/Time.

Task 2. Create a case

When you screen in an intake, you must link it to an existing case or create a new case if the participants in the intake are not known to Ohio SACWIS. Create the Baccus case.

1. Click **link** beside the Baccus intake you just screened in. The Link Case screen appears.
2. Click **Create Case**. The Create Case screen appears.
3. In the **Case Reference Person** field, select Baccus, Loretta (if not already selected).
4. Click **Save**.

Result The system saves the information you entered and returns to the Intake Workload screen. Notice the status message at the top of the screen: “Intake #xxxxx has been linked to Case #xxxxx.” The intake is no longer displayed in the intake workload.

Note The Workload screen does not display names. Here are some tips for finding your intake:

If you have the intake ID number, use Ctrl+F to locate the record.

Look at the date and time of the intake screening decision on the Workload screen to find the intake for your Sam Weaver.

Use the search header link to do an intake search on the Baccus intake. (Hint: Use the Advanced Search criteria.)

Task 3. Route the case to the Assessment/Investigation supervisor

In Franklin County, work items are assigned to supervisors, who then make the individual assignments to workers. Assign the Baccus case to Brandy Lake, the Assessment/ Investigation supervisor.

1. Click the **Home** link in the header links. Then click **OK**. The system returns to the Home screen.

2. Click the **Assignments** tab. The Work Assignments screen appears.

3. Click **Weaver##, Sam** to view work items.

4. Select the check box next to the Baccus case.

5. Click **Assign**. The Assign Work Item screen appears.

6. Find Lake##, Brandy in the Employees table. Click **select** in her row. Ohio SACWIS displays the Employee Assignment screen.

7. Complete the following fields with the data provided:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	Date may be prefilled.
End My Assignment	Select this check box	
Roles	Assessment/Investigation Supervisor	

8. Click **Save**.

Result Ohio SACWIS makes the assignment and returns to the Work Assignments screen. You have completed this exercise.

Note In some PCSAs, work items can be assigned directly to a worker in any group; in other agencies, work items are assigned to a supervisor, who then makes the assignment to a worker in his or her group. The system supports both processes.

Exercise SM-5. Complete Cross-County Assignments and Transfers

Scenario

In addition to supporting work within agencies, Ohio SACWIS helps agencies coordinate or transfer work when necessary. In this exercise, you'll learn how to conduct cross-county assignments with a supervisor in another county and how to transfer a case to another county.

Your agency has received a report of sexual abuse. The mother, Nellie Tucker, is the custodial parent, and she lives in your county. The father, Damon Tucker, resides in Adams County and is the Alleged Perpetrator. You assigned the case to Sally Brown.

Tasks

Task 1. Temporarily assign the case to an Adams county supervisor

Task 2. Transfer the case to Adams county

Task 1. Temporarily assign the case to an Adams County supervisor
At Sally's request, you've asked that a supervisor in Adams County assign a worker to conduct a courtesy interview with Damon. Adams County has agreed. Assign the case to the Assessment/Investigation supervisor in Adams County, Marcia Brandy. In turn, she will assign it to a caseworker who will conduct the interview and document the results in Ohio SACWIS.

1. From the Work Assignments screen, click **Lake##, Brandy**.

2. Click the check box next to Nellie Tucker to select the work item.

3. Click **Assign**. The Assign Work Item screen appears.

4. In the **Agency** field, select Adams County Children Services Board.

5. Click **Show**. The system displays a list of Adams County supervisors in the Employees area, and the Work Items area displays the Tucker case.

6. In the Employees area, select Brandy##, Marcia. The Employee Assignment screen appears.

7. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Start Date	Today's date	May be prefilled.
Comments	Per our phone conversation, Please have one of your workers complete a courtesy interview with the AP.	
Roles	Assessment/Investigation Supervisor	

8. Click **Save**.

Result The system saves your work and returns to the Work Assignments screen. The Tucker case is now temporarily assigned to Marcia, the supervisor in Adams County.

Task 2. Transfer the case to Adams county
The family in the Hackman case (which you assigned to Samantha Bugner in a previous exercise) is moving to Adams county. Transfer the Hackman case to Adams County.

1. Click the link for Crystal Quartz to open her work assignments.

2. Select the check box for Glenda Hackman and click the **transfer** link. The system displays the Transfer Work Assignment screen.

3. Complete the following fields:

Field Name	Information to Enter/Select	Notes
Agency	Adams County Children Services Board	
Transfer Administrator	Sam Weaver	
Reason for Transfer	Family has moved to Adams County.	

4. Click **Save**.

Result The system saves your work and returns to the Work Assignments screen. You've transferred the Hackman case to the Transfer Administrator in Adams County. The system no longer displays the case as a work item for your agency. You have completed this exercise.