



CFIS Web and Client Tracking – Requesting Access & Getting Answers

To ensure timely completion of access requests for CFIS Web, agencies should create and provide a separate 7078 to the appropriate Help Desk. It is not recommended to include access requests for CFIS Web with other applications/systems on the same 7078. Please consult the following FAQ for more information about how to request access and where 7078's should be submitted.

Q1: What functions are available in CFIS Client Tracking?

A: CFIS Client Tracking allows a user to perform activities in three functional areas:

1. Sub-Area: To perform entry of direct service obligations for non-CCMEP participants such as Adults, Dislocated Workers, and discretionary programs such as Rapid Response or National Dislocated Worker grants.
2. CCMEP Lead Agency: To enter and track direct service obligations for CCMEP participants including Youth funded with WIOA dollars and eligible TANF recipients age 16 through 24.
3. OMJ Center: To track “front door” activities of universal customers using the informational services in the resource room, attending workshops, or participating in other basic services.

Q2: How do I get access to CFIS Web and the Client Tracking functional areas, and what kind of access should I have?

A: Contact your local CFIS Web Administrator. If you don't know who that is, consult the provided spreadsheet. The following chart summarizes the process for getting access to CFIS and Client Tracking depending on your need:

<p>Not in CFIS Client Tracking (either having no CFIS account, or user in CFIS Main having no Client Tracking role)</p>	<p>E-mail form JFS 7078 requesting access to “CFIS Client Tracking” to CFIS_CLT_HELP@jfs.ohio.gov. Specify whether you need the Sub-Area, CCMEP Lead Agency, and/or OMJ Center functional area (see above for explanation). After your Client Tracking account is created, your local administrator can assign you the proper user roles.</p>
<p>Need local administrator abilities (to be able to assign roles to other users)</p>	<p>To ensure system security, local areas should limit how many users can serve as administrators. If your leadership can verify that you should have the administrator role, follow the above process but indicate “CFIS Client Tracking administrator” in the “Other” box on form 7078.</p>
<p>Incorrect role permissions</p>	<p>Once a user is in the correct Client Tracking function (Sub-area, CCMEP Lead Agency, or OMJ Center) the local administrator assigns the specific role permissions such as Case Manager, Case Supervisor, OMJ Kiosk admin, etc. Contact your local administrator for these permissions.</p>
<p>Need access to Fiscal functions (in CFIS Main, Ledger Reporting, or CFIS Web WIOA)</p>	<p>Access to fiscal modules in CFIS may be requested by e-mailing the 7078 form, specifying the module needed, to CFIS_HELP_DESK@jfs.ohio.gov.</p>



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Q3: I’m a local agency’s CFIS Web Security Administrator, where do I send 7078’s requesting access to CFIS Web?

A: Consider the functional areas and the activities the user will be performing in CFIS Web, based on that information:

- Does the user need to perform Fiscal related functions such as processing vouchers and reporting financial codes to ODJFS within CFIS Web? If so, send the 7078 to the BCFTA Help Desk: CFIS_HELP_DESK@jfs.ohio.gov
- Does the user need to perform WIOA Program related functions including the entry of the costs of direct services within CFIS Web? If so, send the 7078 to the OWD Help Desk: CFIS_CLT_HELP@jfs.ohio.gov

Q4: Where can I ask general questions about the system or specifically Client Tracking?

A: The following grid explains the role of the various ODJFS Help Desks available to assist you:

<p>CFIS_HELP_DESK@jfs.ohio.gov Phone: 614-752-9194 7:30 AM to 4:30 PM, Mon-Fri</p>	<p>This help desk supports CFIS Main, CFIS General Ledger, and CFIS Web WIOA <i>fiscal</i> modules. Forms requesting access to these modules can be sent to this mailbox as well. Support provided by ODJFS Bureau of County Finance and Technical Assistance.</p>
<p>CFIS_CLT_HELP@jfs.ohio.gov</p>	<p>Requests to create an account in CFIS Client Tracking can be sent to this mailbox. Support provided by Office of Workforce Development.</p>
<p>ohsupport@sivicsolutionsgroup.com Phone: 877-916-3222 8:00 AM to 5:00 PM, Mon-Fri</p>	<p>This mailbox will provide answers on setting up the Check-in\Check-out Kiosk, tracking front door services, tracking the costs of services, and general questions about CFIS Client Tracking system functions. Support provided by Sivic Solutions Group.</p>
<p>Omj-help-desk@jfs.ohio.gov Phone: 888-296-7541, Option #4</p>	<p>This Help Desk responds to questions about the WCMS system such as entry of services on the services screen. Access to WCMS can also be requested through this mailbox</p>
<p>WIOAQNA@jfs.ohio.gov Phone: 888-296-7541, Option #3</p>	<p>Program-related questions pertaining to WIOA law and regulations, eligibility requirements, allowable services under WIOA, etc. should be sent to this mailbox.</p>