Before you begin

All users must have access to MiSACWIS. If access has not been obtained, the following documents should be followed: *M*iSACWIS_GainingAcess_Steps_v5 and *MiSACWIS/CCWIS Enrollment Overview.* These documents can be found on the Child Welfare Technology Communications website under Job Aids > Security.

Contents

Creating and Maintaining Units for Non-MDHHS Users

A unit is a group of workers consisting of one supervisor and multiple members (employees). A unit can have only one supervisor and a supervisor can be assigned to only one unit.

The unit members are those who directly report to the supervisor of the unit. The list of potential unit members comes from all employees who are supervised by the supervisor, saved to the unit, and are not active on any other unit in MiSACWIS.

Local office security coordinators (LOSCs) perform this function for MDHHS local office users.

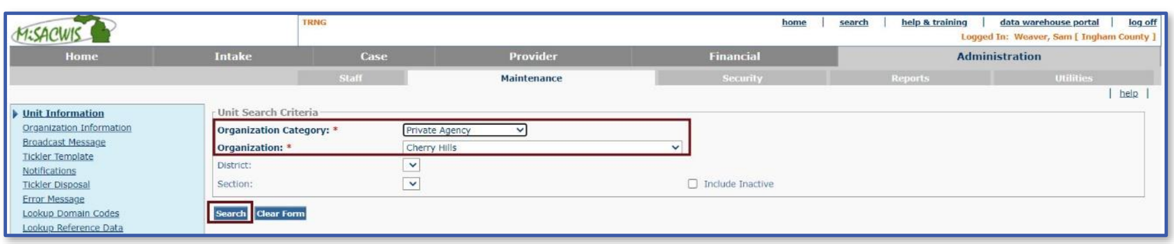
Non-MDHHS units should not include CWFS workers, as they are MDHHS-only workers.

Failure to create and maintain units can result in:

- An inability to assign work tasks to users.
- An inability to assign or transfer work items to other agencies, as well as other supervisors/workers.
- Inaccurate case counts.
- Inaccurate Business Objects reports in the data warehouse.

Creating a Unit

1. Click **Administration** > **Maintenance**. The Unit Search screen appears.
2. The **Organization Category** and **Organization** pre-filled based on the logged in user. Click **Search**. All of the units within the selected organization appear.

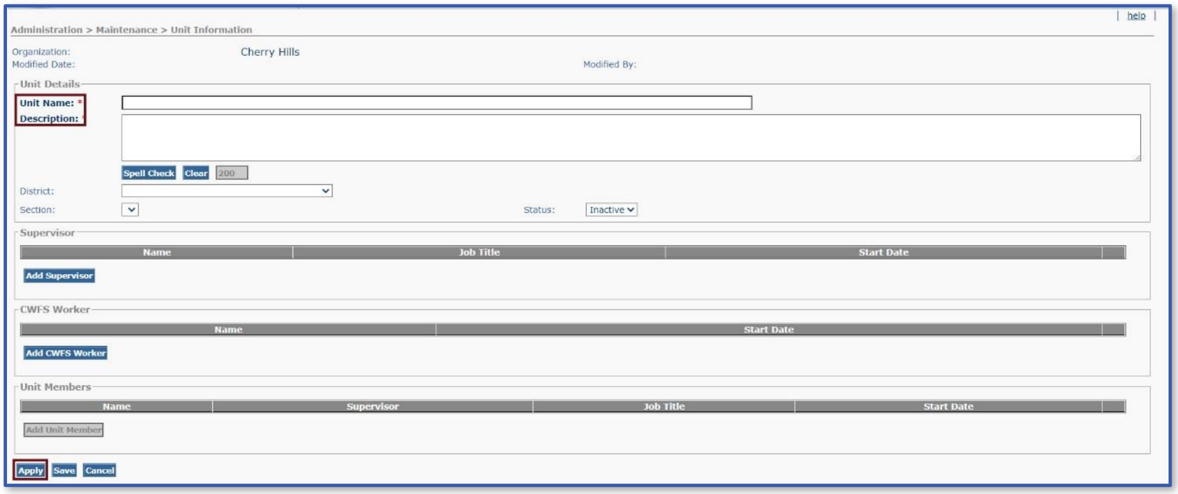


3. Click **Add Unit** to record a new unit for the organization. The Unit Details screen appears.

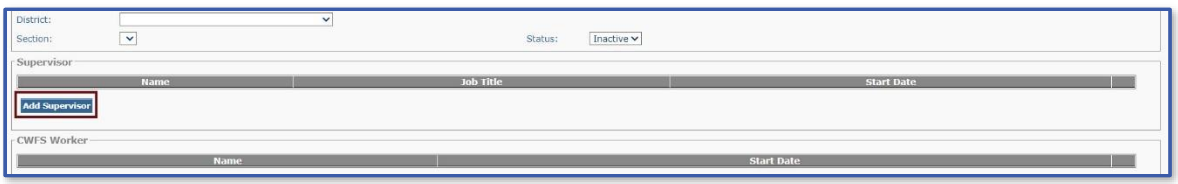
Note

Clicking copy will allow you to record a unit based on an existing record.

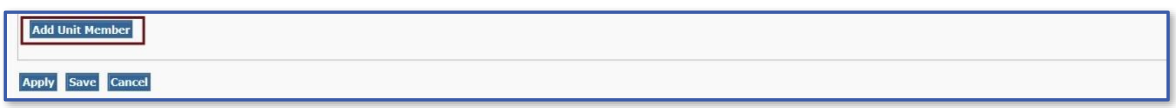
4. Enter the **Unit Name** and complete the **Description** box. Click **Apply.**



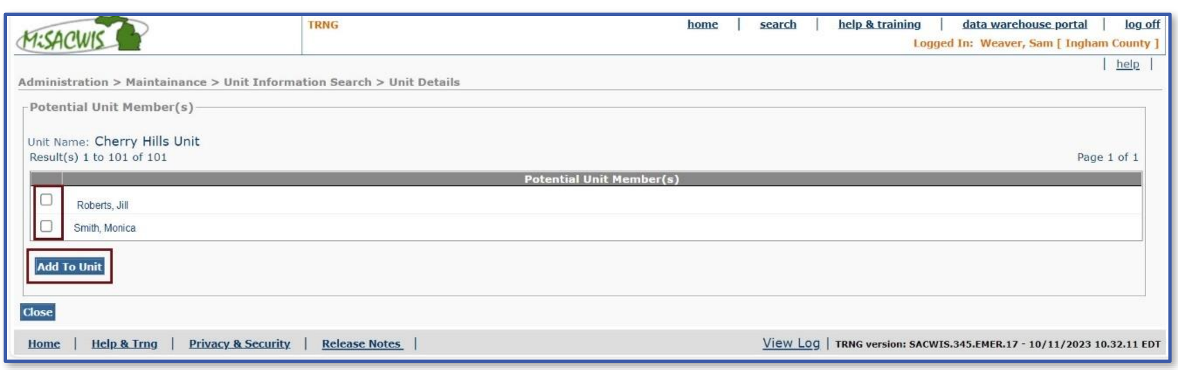
5. Click **Add Supervisor**. The Employee Search screen appears.



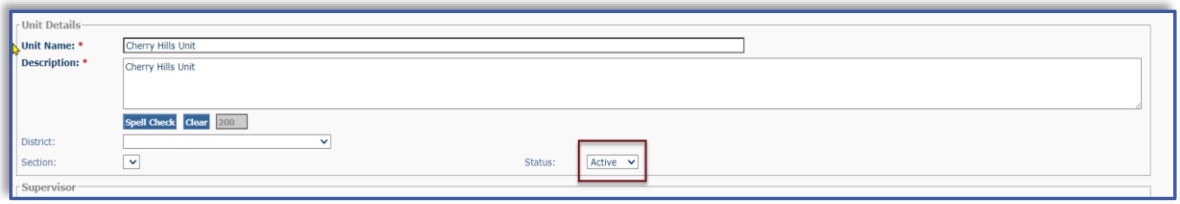
6. Enter search criteria and select the appropriate employee to designate as the supervisor. *Only active employees can be designated as a supervisor.*
7. Click **Add Unit Member**. The Unit Member Detail screen appears.



8. Select the check box for each member who needs to be added to the unit. Click **Add to Unit**. The Unit Details screen appears and the selected employees will appear under Unit Members**.**



9. Change the **Status** to **Active**. Click **Save**.



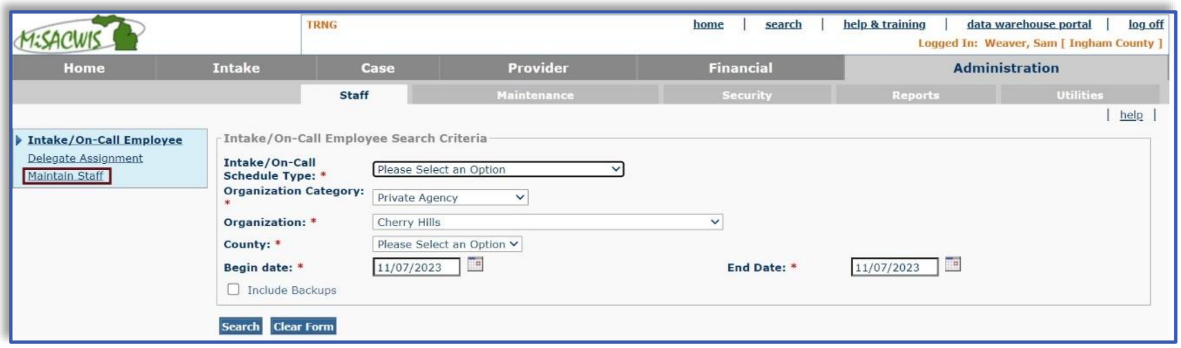
Maintaining Staff

To maintain units, it is important that staff members have the correct supervisor indicated on their employee record. Unit member selection is based on information located within the employee record. If this information is incorrect, the employee will not be available to add to a unit.

Verify a staff member's supervisor

If a staff member is not available to be added to a unit under the supervisor, verify that the employee record of the staff member identifies the correct supervisor.

1. Click Administration > Staff. The Intake/On-Call Employee Search screen appears.
2. Click Maintain Staff. The Employee Search screen appears.



3. Enter the **Last Name** and **First Name** of the employee and select **Private Agency** as the **Organization Category**.
4. Select the appropriate **Organization** from the list. Click **Search**. The Employee Search screen appears.

> **Note**
>
> If no results are returned, then the employee is not an active member of the selected organization. To obtain access, the following documents should be followed: *M*iSACWIS_GainingAcess_Steps_v5 and *MiSACWIS/CCWIS Enrollment Overview.* These documents can be found on the Child Welfare Technology Communications website under Job Aids > Security.

5. Click select next to the appropriate employee. The Employee Basic Information screen appears.
6. The employee's current supervisor is listed in the **Supervisor** column under **Current Job**. *If the information identified is incorrect follow the steps indicated in the relevant scenario below to update the employee's information.*

When a staff has left the agency

1. Prior to the departure of a staff, all of the assignments must first be assigned to another staff, then end dated.

> **Note**
> If the work assignment is end dated prior to the work being reassigned, it will create issues.

2. Send an email to MDHHS Application Security notifying them that the staff has left the agency. Include "Inactivation" in the subject line of the email and request an action of Drop Access in DSA.
3. Once processed, the agency supervisor can update the unit.

When a staff is moved to a different supervisor

1. Users must resubmit a new DSA request for a new supervisor.
    a. Select current access, and update request reason as supervisor change and existing access.
2. Once this is processed, the agency supervisor can update the unit.

When a supervisor or director has left the agency

1. Prior to the departure, all assignments must first be assigned to another supervisor or director and then end dated.

> **Note**
> If the work assignment is end dated prior to the work being reassigned, it will create issues.

2. Send an email to MDHHS Application Security notifying them that the staff has left the agency. Include "Inactivation" in the subject line of the email and request an action of Drop Access in DSA.
3. Once processed, the agency supervisor can update the unit.

Updating a Unit

Once Application Security has processed the DSA request, the agency supervisor can update the unit with the correct information.

1. Click **Administration**>**Maintenance**. The Unit Search screen appears with **Organization Category** and **Organization** pre-filled based on the logged-in user.
2. Click **Search**. All Units within the selected organization appear.
3. Click select. The Unit Details screen appears.
4. To remove an employee from a unit, click delete next to the record.

5. To add an employee to a unit, click either **Add Supervisor** or **Add Unit Member**. *A unit can only have one active supervisor at a time.*

6. Click **Save**. The Unit Search screen appears.

Support Tools

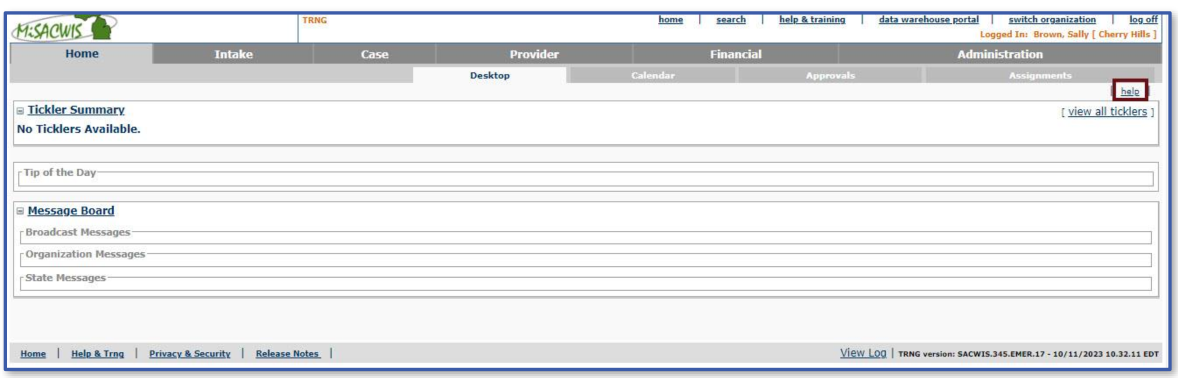
MiSACWIS provides ongoing support and various resources for our users. Below are some of the support tools readily available to our end users.

Tool	How to find it	When to use it
Online Help	Click help & training in the header or click help on any screen in the system.	For assistance in completing tasks in MiSACWIS, glossary definitions, information about the screen, or policies.
CBT (Computer Based Trainings)	Located on LMS or within the help link on any screen.	To learn how to do a task or visually see the task.
MDHHS Policy	Click help & training in the header or footer then select Rules, Regulations & Policy.	To refer to MDHHS policy that are related to the subject matter.

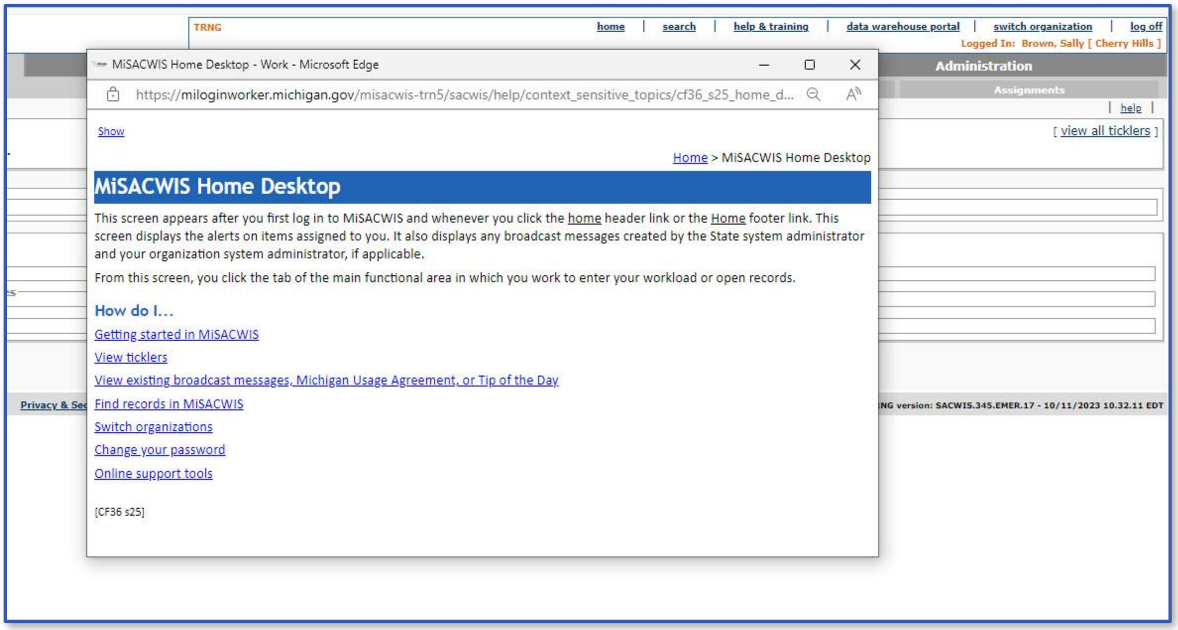
Using online help

MiSACWIS online help is a comprehensive, search version of a user manual. Instead of being printed on paper, online help is available within MiSACWIS at the specific point of need.

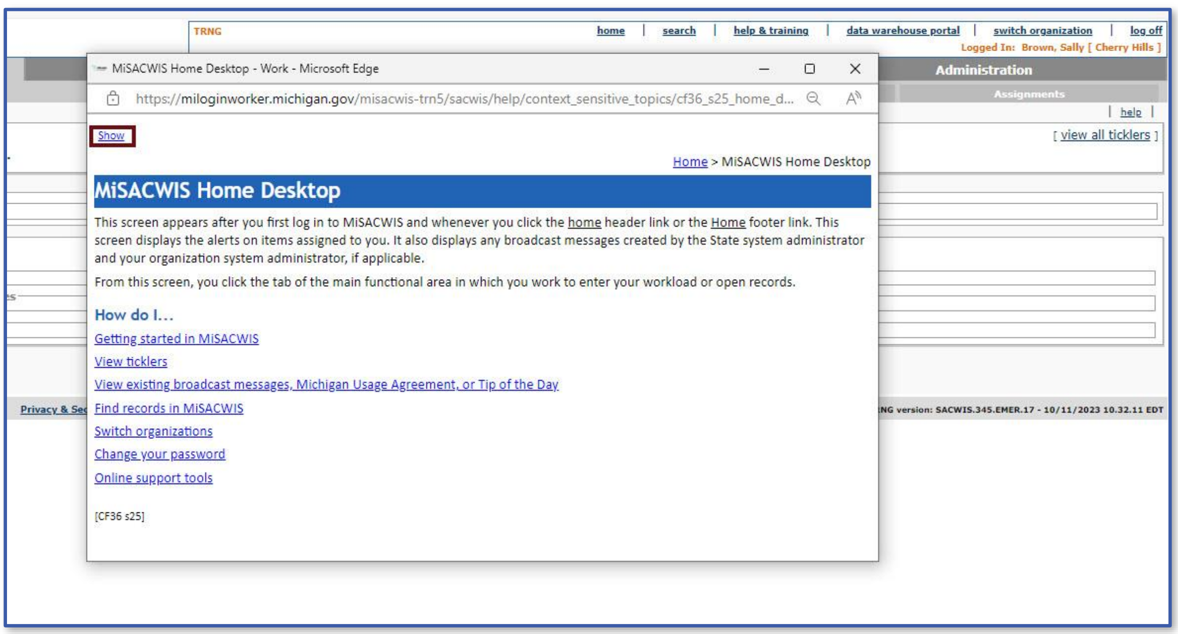
- Users can open online help in a few different ways. The fastest way to get help while in MiSACWIS is to click the help link in the upper right of the screen.



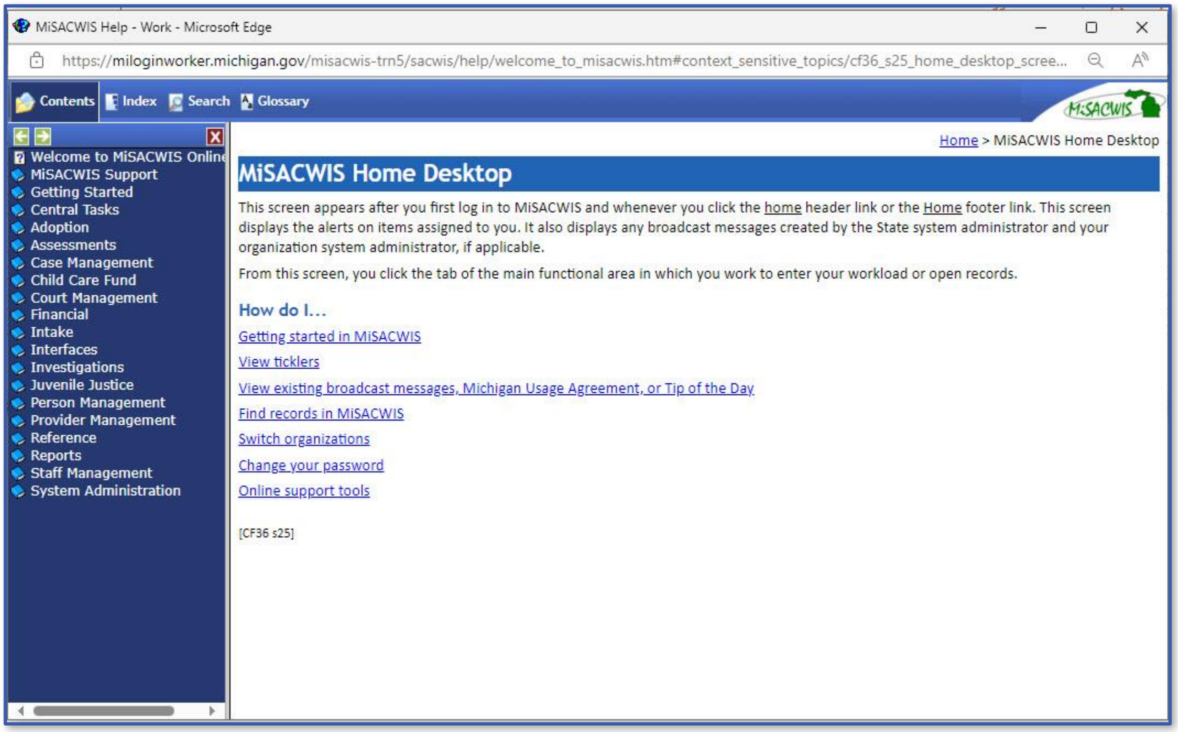
- When clicking the help link, a new screen will appear with information related to the screen the user is on.



- To view the full online help system from the screen topic, click show in the upper left corner of the topic.



The navigation window appears, displaying the full help system.



The **Contents**, **Index**, **Glossary** and **Search** button offer different ways in which users can find information:

- **Contents**- Organized topics according to the functional job areas within MiSACWIS. Categories of topics appear as "books" in the contents. Specific topics appear as pages. In the right pane, users will see the topic they select. When users open the main help system, the **Contents** display by default.
- **Index**- Offers an alphabetical list of keywords within the online help. This index is more interactive than one in a book and users can search for keywords and topics. In the right pane, users will see the topic selected.
- **Search-** Allows users to search the help content for specific terms. Users can type the term they are looking for in the **Search** box. The topics containing the term the user entered are listed in the pane. Users can click on the topic to view the content. Users can enable or disable the term highlighting feature by selecting the **Highlight search results** check box. In the right pane, users will see the topic selected.
- **Glossary-** Contains the MiSACWIS terms for reference. Click a word and its definition will appear in the box below.

Central Tasks

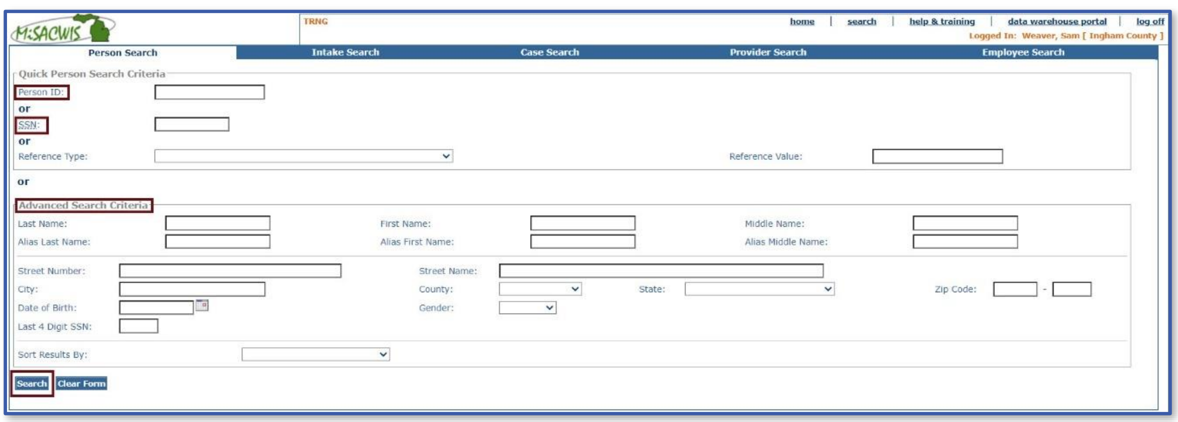
Find or add a person

Users can find a person, through the general Person Search screen, by clicking search at the top of the main screen. The Person Search tab is the default search tab. From here, users can check if a person record already exists for someone; However, a new person record cannot be added from the main **Person Search** tab.

Users can also find a person from a work item (e.g. incident report) and link the person to the work item. Within this area, users can add a new person record. Before adding a person, users will be prompted to search. This helps eliminate the duplication of records.

To find a person

1. From any screen, click search in the header. The Person Search screen appears.
2. Enter the criteria for the search.
   - If the person's ID or SSN is known, enter the information in the Quick Person Search Criteria.
   - If the person's ID is not known, the persons last name can be used under Advanced Search Criteria. Additional criteria will narrow the search.
3. Click **Search**. The matching person records appear in the Person Search Results.



4. If duplicate search results appear, preview the person information for each duplicate person to determine the correct record to use. Click the person name to preview.

5. Click <u>select</u> to view the person profile. If the user is searching for a person within a work item, clicking <u>select</u> will add the person's name to the item.

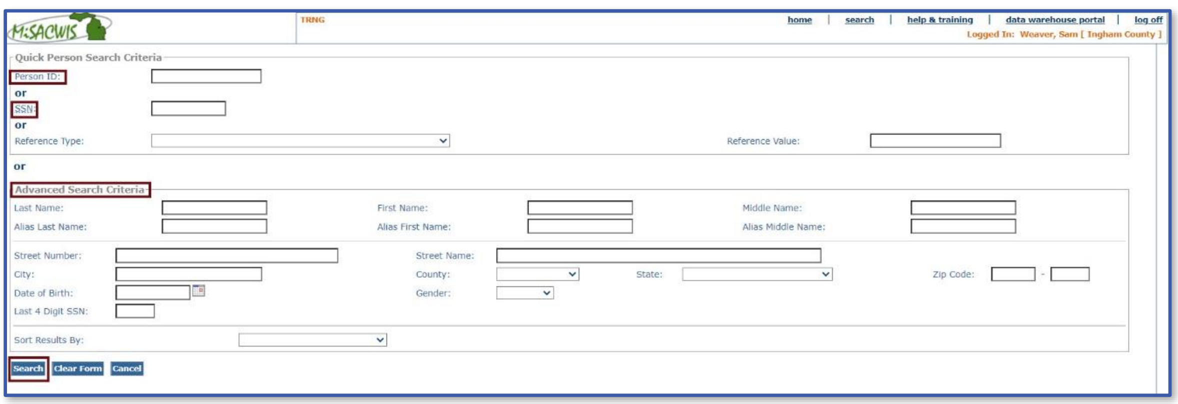

Person Search Results
Result(s) 46 - 50 of 50
Page 4 of 4

	Person ID	Name	Alias	Bridges Recipient ID	Address	Gender	Has SSN	DOB	% Match	
select	101260822	Stone,Francine			0027 UNION HILL RD, Lansing, MI 48933	Female	Yes	05/03/2017		MiSACWIS History
select	68660813	Stone,Francine			0017 UNION HILL RD, Lansing, MI 48933	Female	Yes	05/03/2016		MiSACWIS History
select	59470802	Stone,Francine			0014 N WILSON BLVD, Lansing, MI 48933	Female	Yes	05/03/2016		MiSACWIS History

Results Page: | 1 | 2 | 3 | 4

To add a person:

1. From work item screen, select **Add Member**. The Person Search screen appears.
2. Enter the criteria for the search.
   - If the person's ID or SSN is known, enter the information in the Quick Person Search Criteria.
   - If the person's ID is not known, the persons last name can be used under Advanced Search Criteria. Additional criteria will narrow the search.



3. If the person does not appear in the search results, click **Create New Person**. The Basic Person Information screen appears.

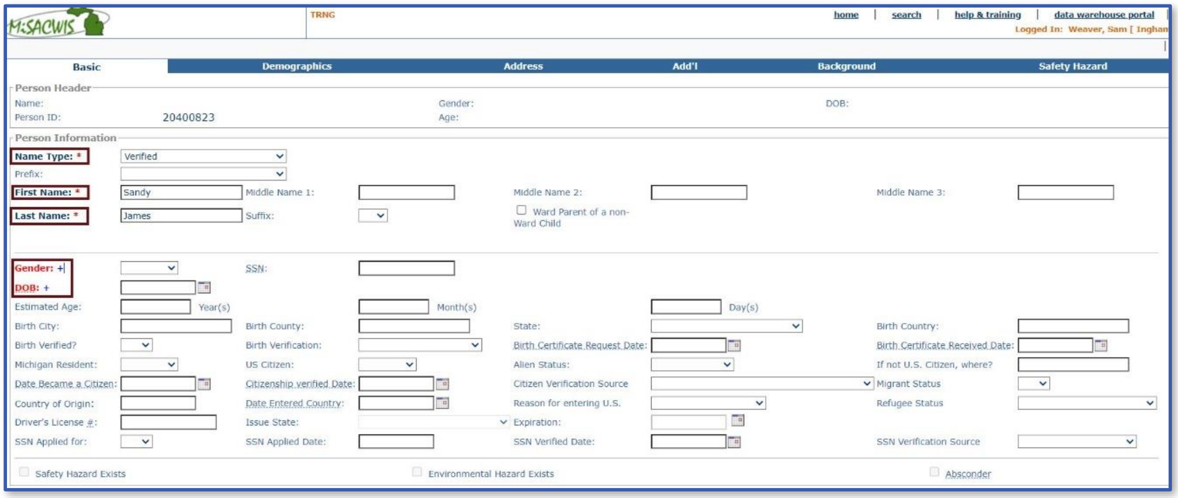

Person Search Results
Result(s) 1 - 15 of 50
Page 1 of 4
Pre-adoptive personwhose adoption has been finalized will not be displayed in search results.

	Person ID	Name	Alias	Bridges Recipient ID	Address	Gender	Has SSN	DOB	% Match	
select	670930810	James,Amanda			0217 S Waverly, Lansing, MI 48917	Female	Yes	07/28/2006		MiSACWIS History
select	118960812	James,William			0033 S Waverly, Lansing, MI 48917	Male	Yes	04/27/2015		MiSACWIS History

Results Page: | 1 | 2 | 3 | 4 |

Create New Person
Return

4. Complete the required boxes on the screen and click **Save**.



Online Help

For more details on how to enter a new, complete person profile, please see the “Record a Person Profile” process in online help.

Add Employees

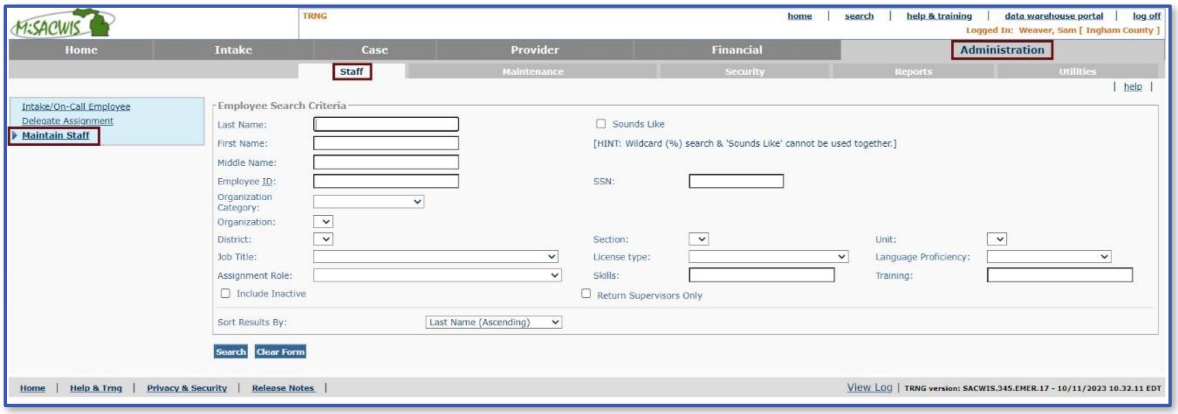
Employee records include basic information, job history, and qualifications. An employee has both an employee record and a person record in MiSACWIS. When recording new employees, the name, birth date, gender and other basic information is stored in the related person record instead of their employee record.

To add employees:

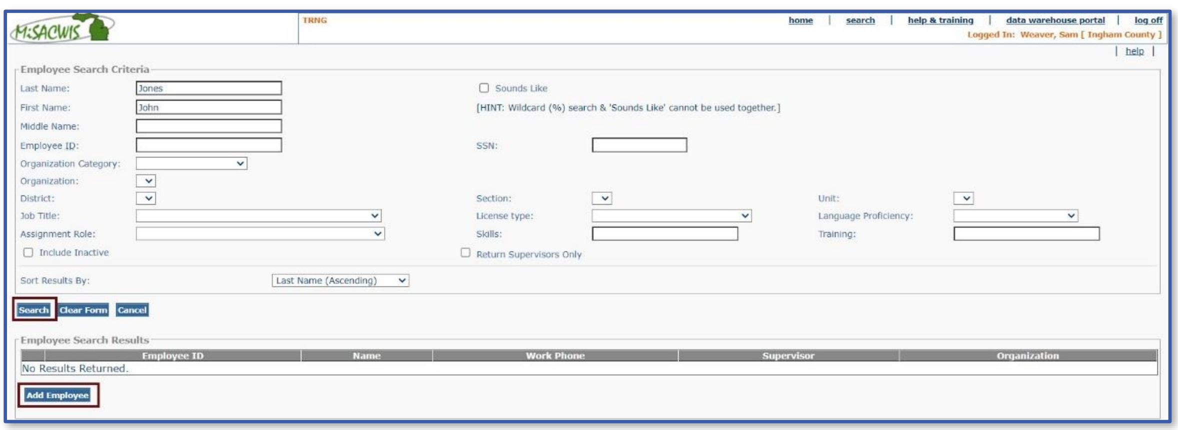
1. From the Home screen, click search. The Person Search screen appears.
2. Click **Employee Search**. The Employee Search screen appears.

   OR

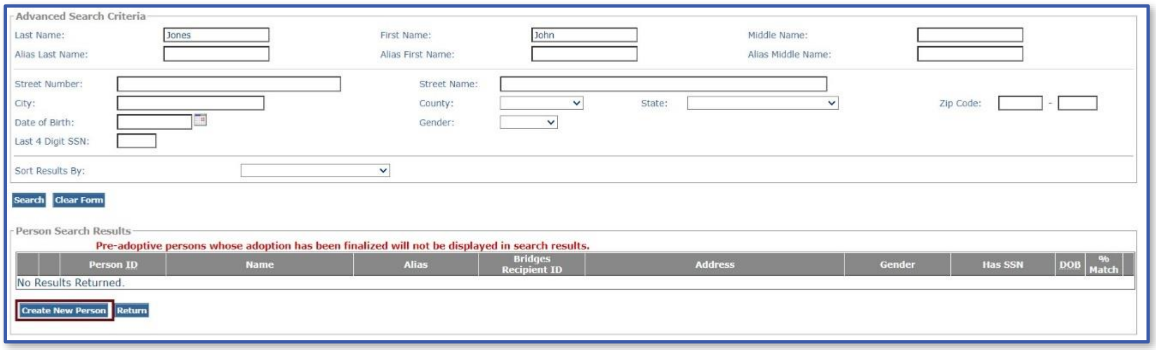
3. From the Home screen, click **Administrative > Staff**. Click Maintain Staff in the left-hand menu. The Employee Search screen appears.



4. Enter search criteria and click **Search**. The matching employees appear in the search results.
5. If the employee does not exist, click **Add Employee**. The Person Search screen appears.



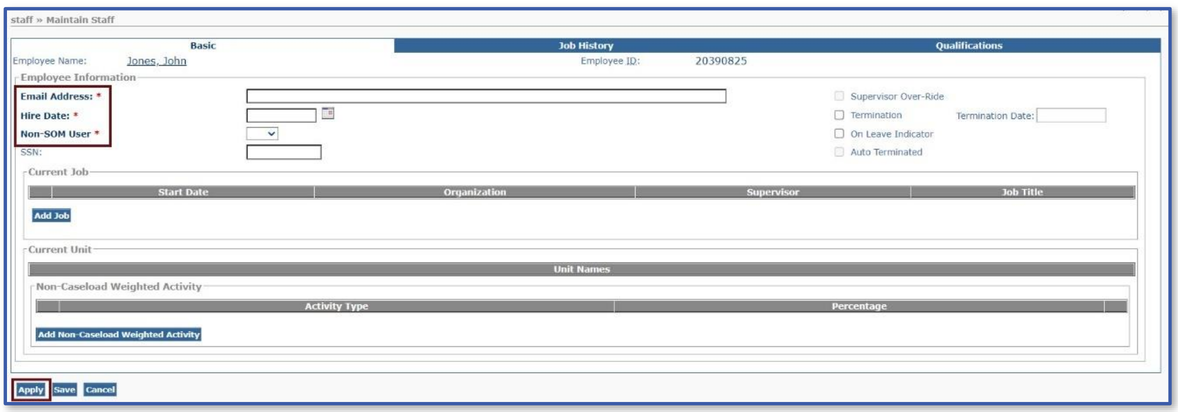
6. Enter search criteria and select the person to be added as an employee. If the person record does not exist, click **Create New Person**.



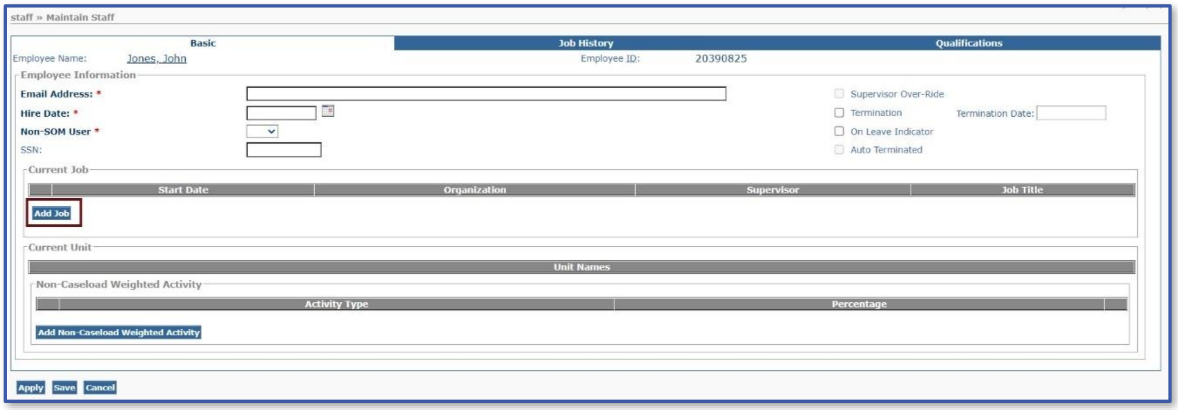
7. Enter all required information. Click **Save**. The Person Overview screen appears.

8. Click **Close**. The Employee Basic Information screen appears.

9. Enter the employee's **Email Address**, **Hire Date**, and **Non-SOM User** option, then click **Apply**.



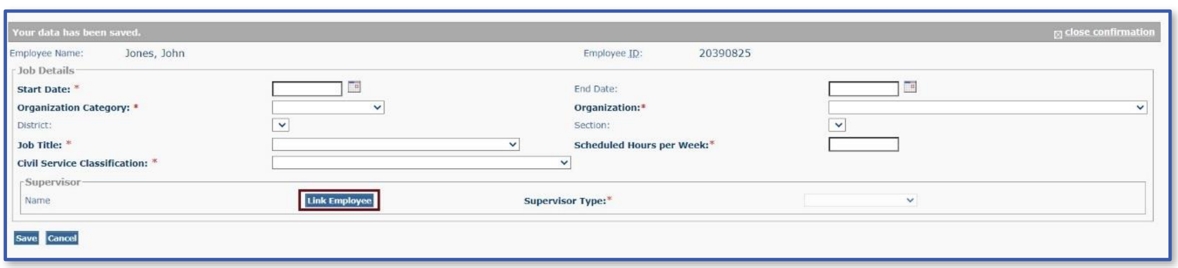
10. Complete the following steps to add a job for the employee.



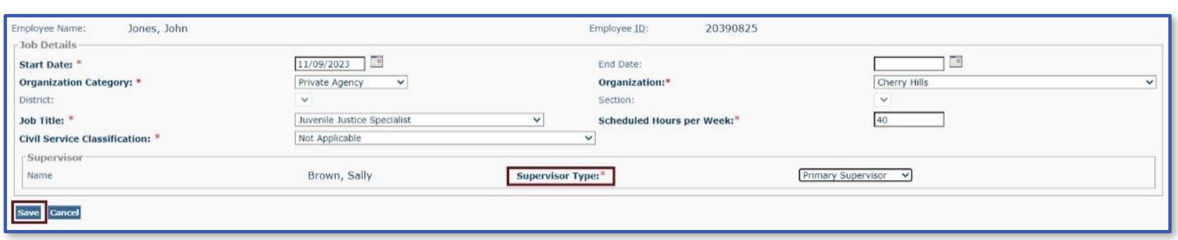
a. Click **Add Job** to record the employee's position.

b. Complete the required information.

c. Click **Link Employee** to search.



d. Select the supervisor and then **Supervisor Type**. Click **Save**. The Employee Basic Information screen appears.



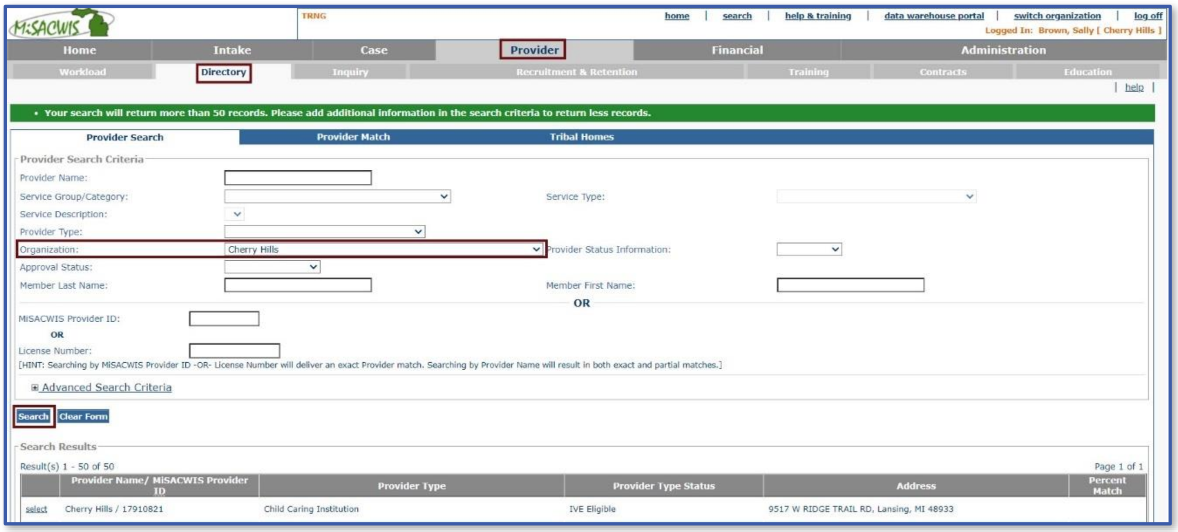
11. Optional: Add a non-caseload weighted activity for the employee.
    a. Click **Add Non-Caseload Weighted Activity**.
    b. Select an activity from the **Activity Type**.
    c. Enter the percentage of the activity in the **Percentage**.
    d. Click **Save**. The Employee Basic Information screen appears.
12. Optional: Add professional licenses/education/skills.
    a. Click **Qualifications**.
    b. Select **Add License**, **Add Education** or **Add Skills**.
    c. Click **Save**. The Employee Search scree will appear.

View Existing Incident Reports

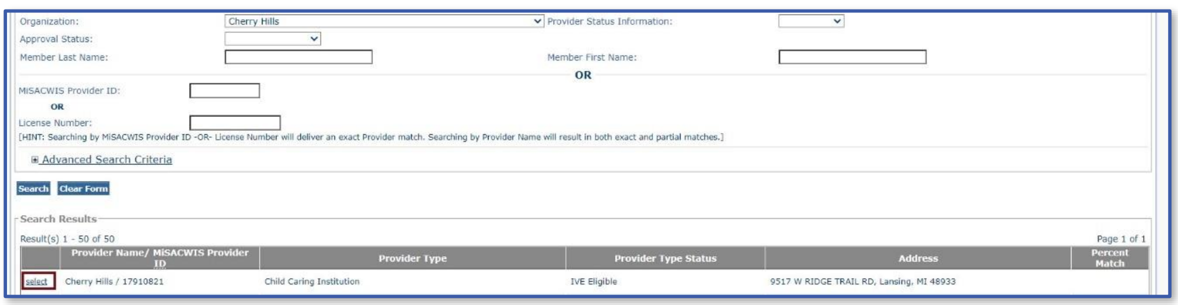
In MiSACWIS, users can view the incident reports that have been recorded for the organization.

View incident reports:

1. Click **Provider> Directory**. The Provider Search screen appears.
2. Click **Search** to search for the facilities in the user's organization. The organization assigned to the user will prepopulate in the **Organization** list.

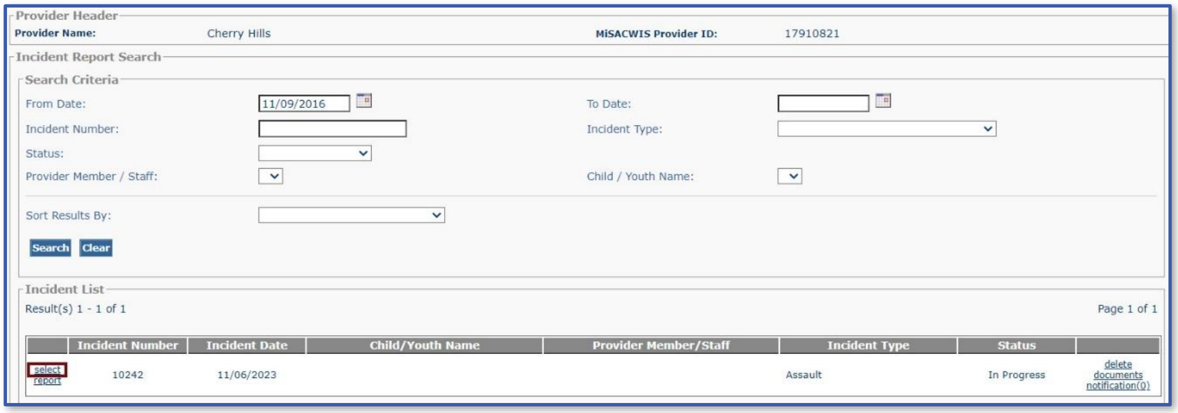


3. In the search results, click select beside the facility. The Provider Summary screen appears.



4. Select **Incident Reports**. The Incident Search screen appears.
5. If there are numerous incident reports, enter search criteria for the report to view and click **Search**. The matching reports appear in the results.

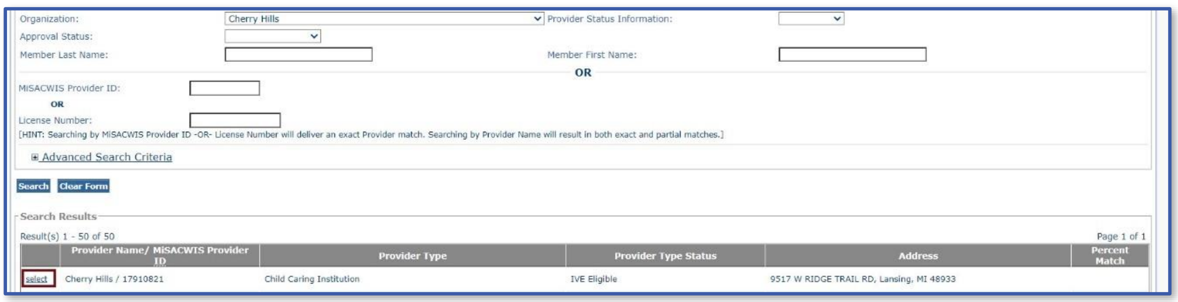
6. Click select beside the report. The Incident Details screen appears.



7. Click the tabs within the incident report to view the details about the incident.
8. Click **Cancel** to return to the Incident Search screen.

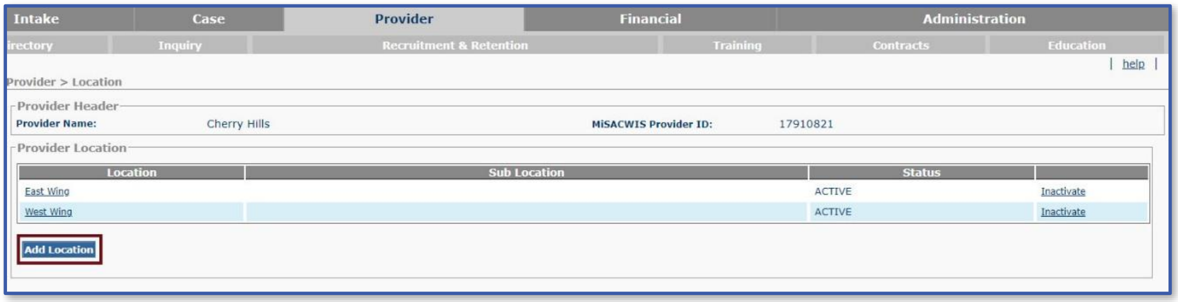
To add locations and sub locations

1. Click select beside the facility.

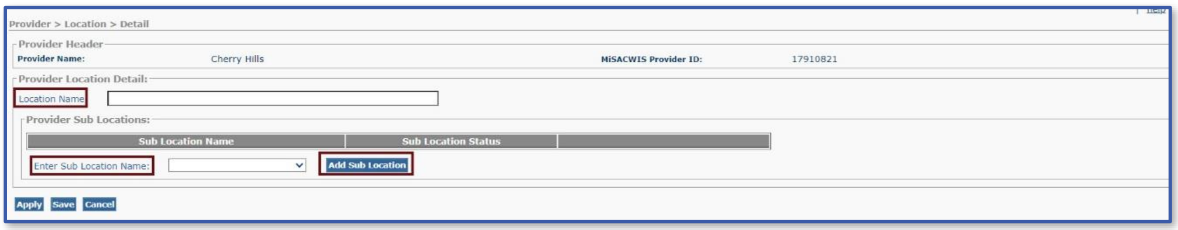


2. From the left hand menu, click Provider Location. The Provider Location screen appears. Existing provider locations are listed in the location list.

3. Click **Add Location** to add a new location.



4. In the Location Name box, enter the location name.
5. In the Provider Sub Locations, select the desired sub location and click **Add Sub Location**.

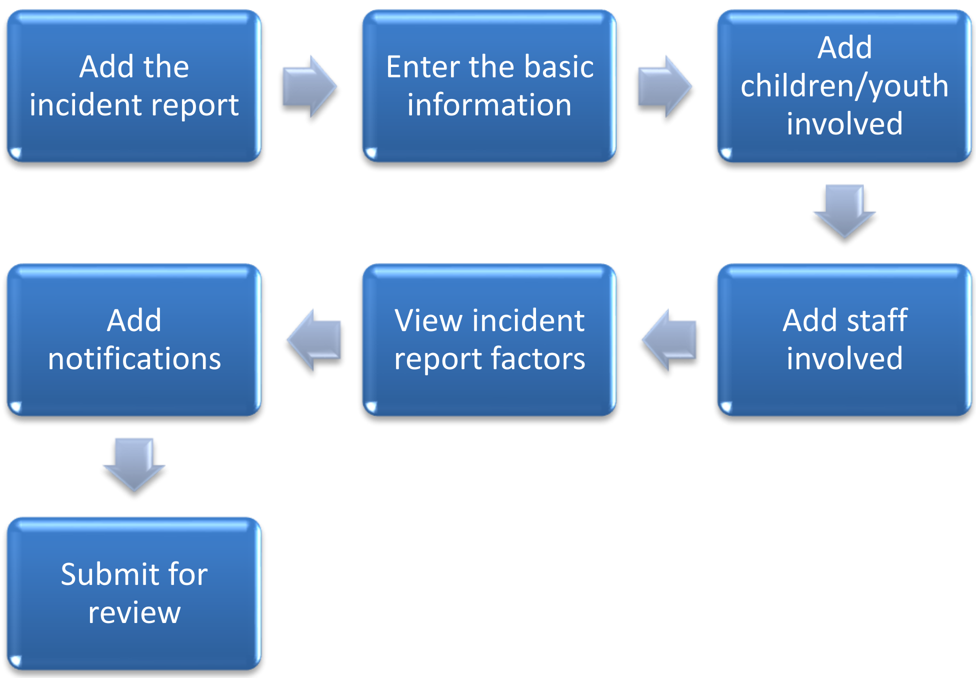


6. Add additional sub locations by selecting them from the list and clicking **Add Sub Location**.
7. Click **Save**. The Provider Location Screen appears.

Record an Incident Report

Reporting incidents quickly and accurately is crucial to the daily operations of MDHHS for the care and safety of children, youth, and employees. In MiSACWIS, users record incidents reports that include the incident details, the child or youth involved, and the provider members or staff involved.

Recording an incident report includes these high-level steps in MiSACWIS.



For detailed instruction to Record an Incident Report, please use the *Adding an Incident Report* Job Aid.

Other Resources

List other related resources users can consult based on this topic:

- *Adding an Incident Report* Job Aid
- *Reviewing and Approving Incident Report* Job Aid
- *Setting Up and Maintaining Units* Job Aid