User Profile

SSIS Administrators create and edit user profiles from User Search, under Lists in SSIS Administration. User profiles contain basic information, assigned roles, program restrictions, qualifications and other details for each user.

User Search

To access User Search:

1. Log onto SSIS Admin and select Lists from the Windows toolbar.
2. Select User Search.

There are three searches available under User Search:

- **Name Search** finds current workers by name
- **Department Search** finds workers assigned to a specific Department
- **Unit Search** finds workers assigned to a specific Unit

Hint: Un-check Active workers only to include inactive workers in your search results.
To add a new User:

1. Access the **Action** menu and select **New User**.
2. The User Profile tab displays.

**Hint:** The User Profile tab is where you can enter or edit basic information about the worker. Information entered on this tab autofills into documents and service plans.
To enter or edit the User Profile:

1. Enter the user’s name.
   - Use the Prefix, First, Middle, Last and Suffix to identify users as needed.
   - Use the user’s middle name when two people in the agency have the same first and last name.
2. Enter a Title, if applicable, e.g., case worker.
3. Enter the user’s E-mail.
   - This e-mail address prints on documents in chronology.
4. Enter the worker’s Phone.
   - This phone number prints on documents in chronology.
5. Enter the SSIS User ID.
   - This is the worker’s username for SSIS and not case sensitive.
   - This is determined by each agency.
6. Click on the Password button, enter the Password two times and click OK.
   - Passwords are case sensitive in SSIS.
7. Enter the Agency Staff ID, if applicable.
   - This ID is determined by your agency
8. The SSIS User ID is autofilled and assigned by SSIS.
9. Select the Entity the worker is employed by from the drop-down menu.
10. Select the Employee Type in the drop-down menu to further identify the worker in the agency.

Hint: Entity and Employee Type help identify if a user’s time is included in state reporting.

11. Select Yes or No if the worker is part of the Mental Health Adult Initiative (MHAI).
12. Select Yes or No if the worker is an RTC Employee.
13. If Yes is selected on RTC employee, select the Host County for the worker.
14. Select the Role from the drop-down menu in which the user should be assigned.

Hint: A Temp Role may be assigned to a User with a specific From and To date for the User to fill in for additional tasks if others are out of the office.
15. Select the **Workgroup Function Scope** for the worker.
   - This selection provides security to the amount and type of data the worker can view in SSIS.
     - **No Access** – Use this setting for workers no longer employed by your agency.
     - **Assigned workgroups** – Workers can only view workgroup information for the workgroups assigned to them.
     - **Department** – Workers can view workgroup information for workgroups assigned to their department.
     - **Unit** – Workers can only view workgroup information for workgroups assigned to their unit.
     - **Unrestricted** – Workers can view all workgroups in SSIS.

16. Select **Yes or No** if **Workgroup Edit Allowed** for the user.

17. Select the **Intake Worker Scope** from the drop-down menu.
   - Intake Worker Scope provides security for all workers who create intakes in your agency and is similar to Workgroup Function Scope.

18. Select the worker’s **Intake Unit** from the drop-down menu.

**Hints:**
- **Case Management, Assessment and Intake workgroups can be restricted individually.** When access is restricted at the workgroup level, depending on the workgroup access restriction, workers may not be able to view the information regardless of selection on the User Profile in SSIS Administration.
- **If the Intake Worker Scope fields are not completed and the worker creates an intake workgroup, that intake workgroup is assigned to the SSIS default unit with no access restriction.**

19. Select the **County Of Service** for the worker.
20. Select **Yes** if the worker is required to report time in SSIS.
    - Select **No** if the worker is not required to enter contact/activities in SSIS.
21. Select **Yes** if this worker is a **Local Agency Contact** for document templates.
22. Enter the **Document Credentials** for the worker, e.g., LICSW.
Program Restrictions

The Program restrictions tab indicates which programs the worker cannot access. If a program is selected on this tab, the worker cannot view workgroup information associated with the program. This tab acts as another level of security.

To restrict access to a program area(s):

1. Click on the check box in front of the program area to restrict access.
   - To restrict access to all programs, click the Select all button.
   - For no restrictions on program areas, select the Remove all button.

Department Assignments Tab

The Department Assignments tab indicates the department that the worker is assigned. Selections on this tab indicate the assignment, not a restriction. All departments entered in the Department List display on this tab, including the SSIS default department.
To assign worker to a Department:

1. Click on the check box in front of the Department to assign the worker.
   - To assign a worker to all departments, click the Select all button.
   - To remove the worker from all departments, click the Remove all button.

Hint: If a department is not selected, the worker is assigned to the SSIS default department with no access restrictions.

Unit Assignments Tab

The Unit Assignments tab indicates which unit(s) the worker is assigned. Selection on this tab indicates the assignment, not a restriction. All units entered in the Unit List display on this tab, including the SSIS default unit.

To assign worker to a Unit:

1. Click on the check box in front of the Unit to assign the worker.
   - To assign a worker to all units, click the Select all button.
   - To remove the worker from all units, click the Remove all button.

Hint: If a unit is not selected, the worker is assigned to the SSIS default unit with no access restrictions.
The Units supervised tab is only used for supervisors in your agency. The selection on this tab indicates the supervisor for each unit and is included on documents and service plans. Selection on this tab indicates assignment, not a restriction. All units entered in the Unit List display with on this tab, including the SSIS default unit.

To identify the worker as a supervisor of a unit:

1. Click on the **check box** in front of the unit the worker is the supervisor for.
   - To identify the worker as a supervisor of all units, click the **Select all** button.
   - To identify the worker as a supervisor of no units, click the **Remove all** button.
Federal & State policy require that agencies verify when staff are eligible to provide services and claim reimbursement for these services. The Qualifications tab is used to document users that are qualified to claim.

In order for Healthcare claims to generate, eligible staff must have a Qualification entered with a Type of Healthcare Claiming and the appropriate Claim Category, and Qualified must be Yes.

In addition to Healthcare claiming qualifications, this tab enables you to identify staff who are not the primary worker in a workgroup, but qualified to make monthly contacts with children in continuous placement. You can enter a Qualification with the Type Child safety/permanency professional on this tab to identify appropriate staff.

To enter a new Qualification:

1. Access Action menu and select New Qualification.
2. Select the Type from the drop-down menu.
3. Select the appropriate Claim category, if Healthcare claiming is selected.
4. Select Yes or No in the Qualified field.
5. Enter a Start date and an End date, if applicable.
6. Click Save.