Maintain Worker Record

The Maintain Worker Information page is used to update information about an existing worker, add a new worker, and create security requests for that worker. The page can be used to update a worker's job class, location, supervisor, and person management information. If a worker moves from one county to another, the current record should be inactivated and activated with the new county information to re-link security. Additional security is needed to change worker records.

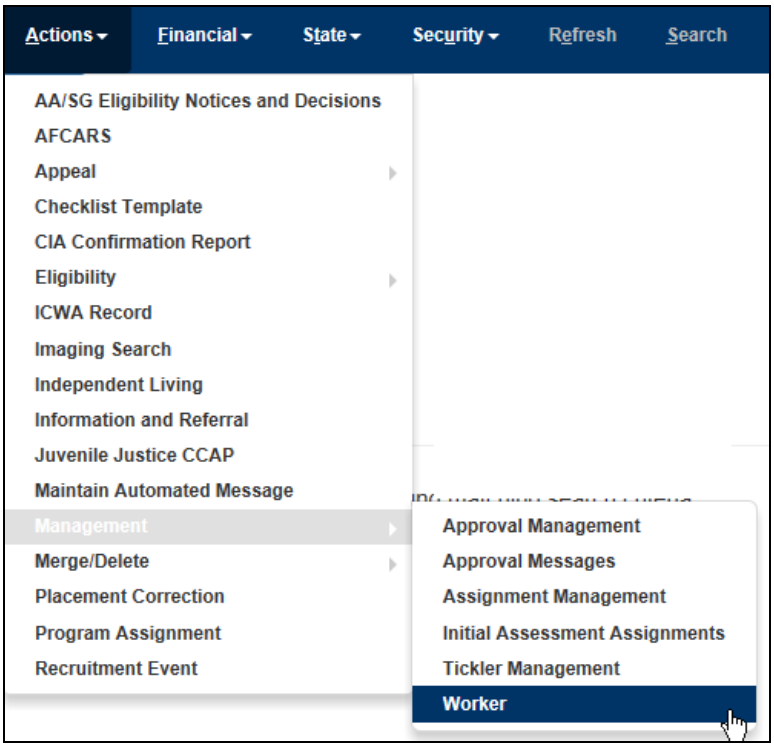
Note: **Do not create duplicate worker records**. Collapse and expand each section by using the arrow to the left of each heading.

Related User Guides

- Person Management
- Search Guide
- eWiSACWIS Security

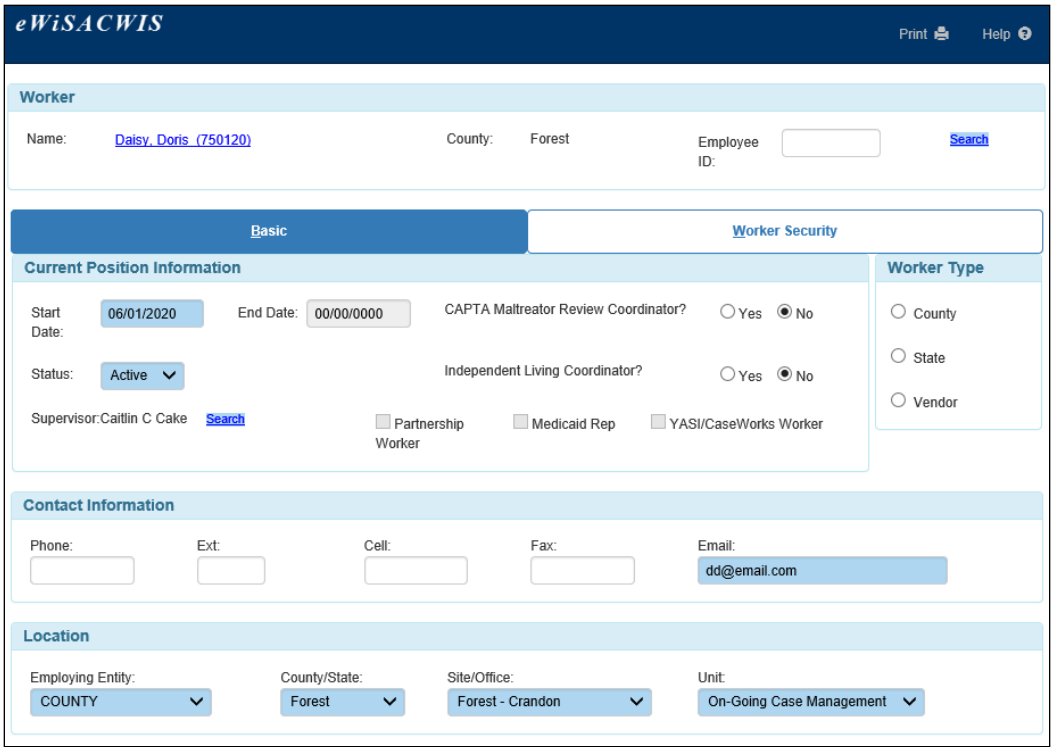
Add or Search for a Worker Record

1. Click on Actions > Management > Worker. This will open the Maintain Worker Information page.

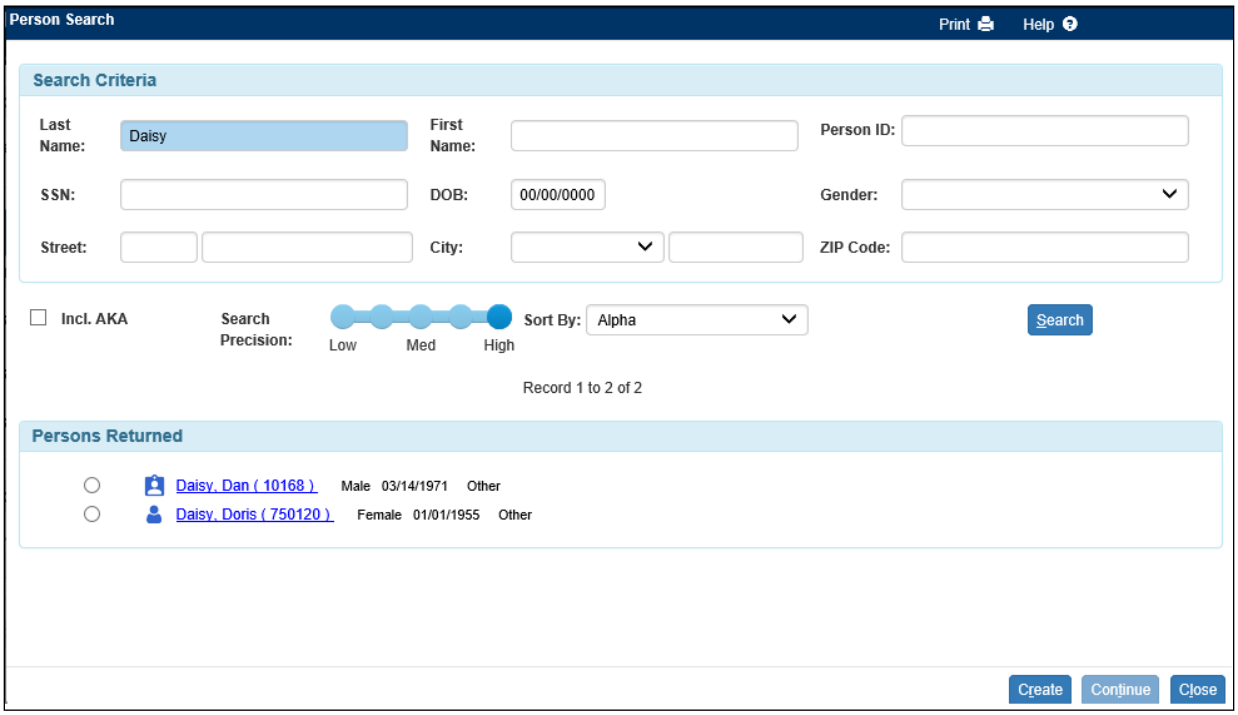


2. On the Maintain Worker page, click on the Search hyperlink to search existing workers, and/or add a new worker.

   Note: Workers will only see the Basic tab on the Maintain Worker Information page. Supervisors and Security Delegates will also see the Worker Security tab as well.



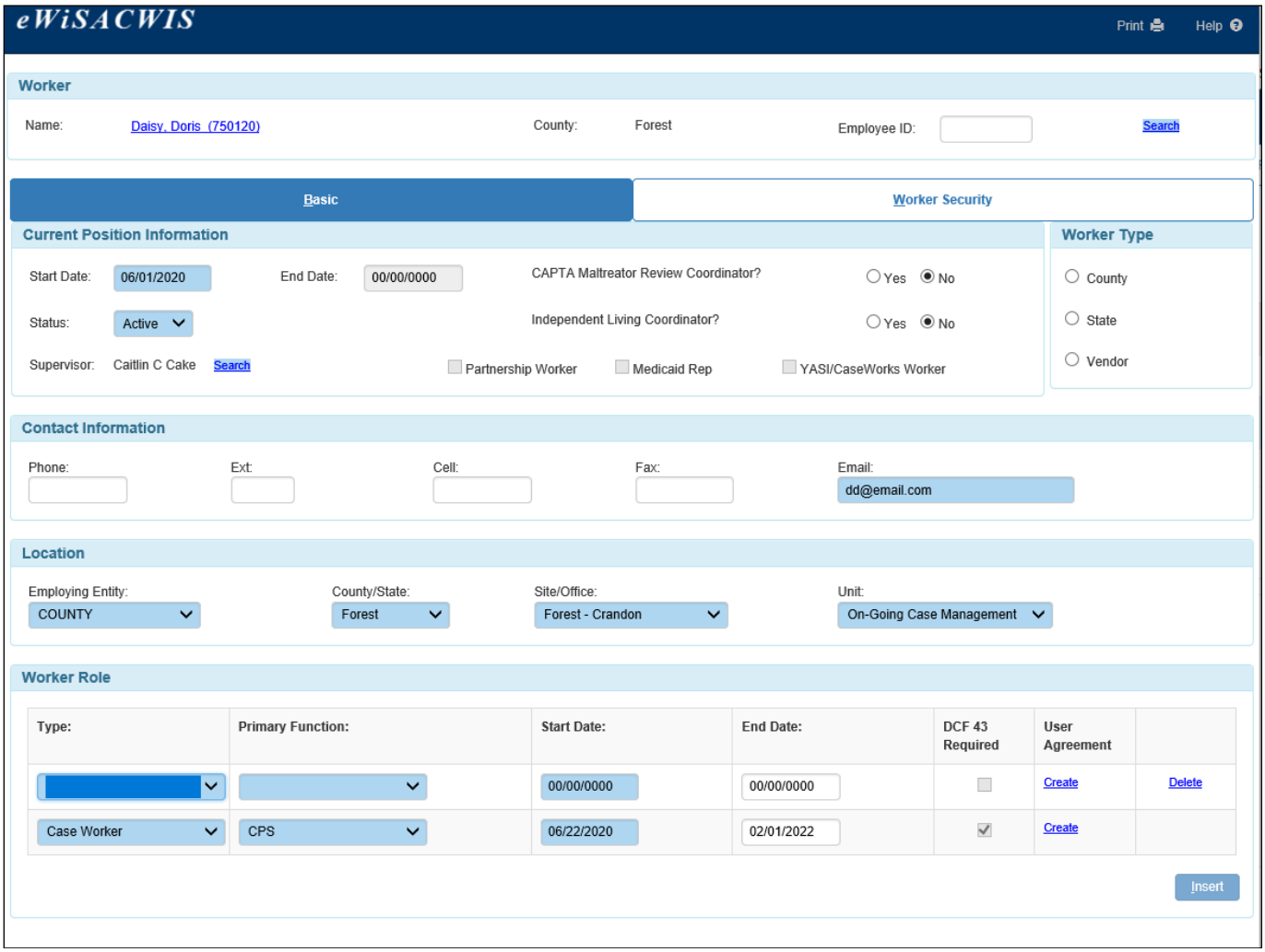
Using the Person Search page, enter the name of the worker and click the Search button. If the worker is found, select the radio button next to the worker. If the worker is not returned, click the Create button to create a new person that is not already known to eWiSACWIS. See the Person Management User Guide for assistance creating the new record. Once a worker is selected or created, click Continue.



Completing the Maintain Worker Information Page

Basic Tab

The Basic tab of the Maintain Worker Information page will pre-fill with information about the worker. The worker's name and Person ID is a hyperlink and will open the worker's Person Management record where their name and other basic demographic information can be updated. On the Maintain Worker Information page you will find:



• **Current Position Information**: This section contains information including Start and End Date, Status, Supervisor name, and several radio buttons which offer workers special capacities.

1. **CAPTA Maltreater Review Coordinator:** allows workers to receive maltreater ticklers at end of IA
2. **Independent Living Coordinator:** if "Yes", the worker receives IL Messages
3. **Partnership Worker:** allows worker to create and view Partnership access reports
4. **Medicaid Rep:** allows worker to approve and send MA requests to the State.
5. **YASI/CaseWorks worker:** allows worker to sign into YASI from the Youth Justice pages.

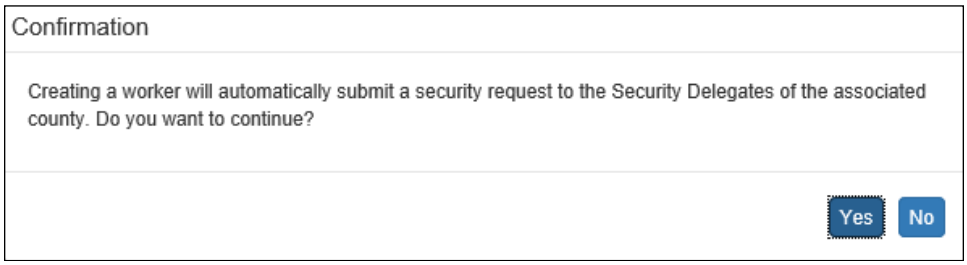
Note: Partnership, Medicaid Rep, and YASI/CaseWorks security is maintained on the security request page.

Note: To add or change the worker's supervisor, click the Search hyperlink.

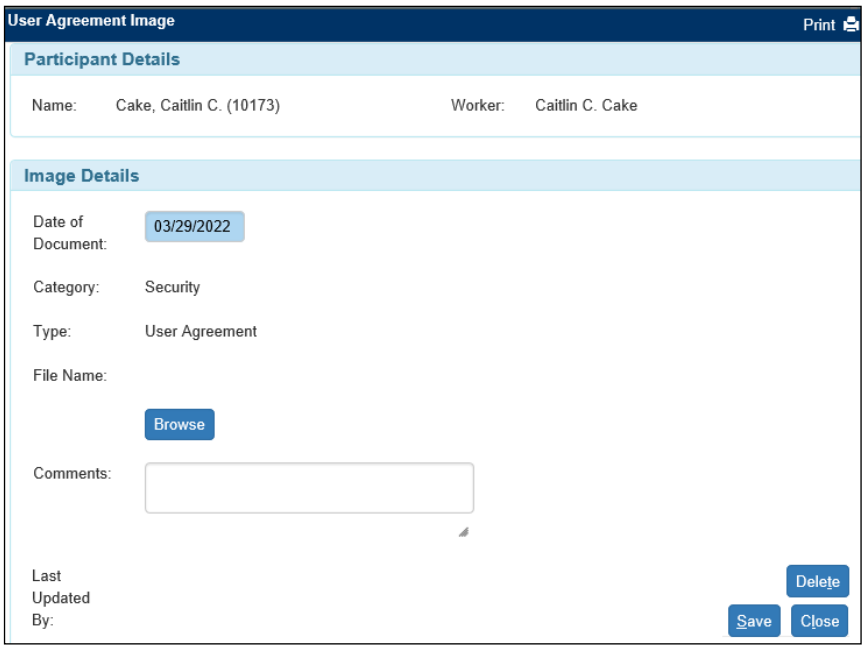
• **Worker Type:** This section displays if the worker is County, State, or Vendor.
• **Contact Information:** This section displays the Phone, Ext., Cell, Fax, and Email.

- **Location**: This section is used to document the Employing Entity, County/State, Site/Office, and Unit.
- **Worker Role:** This section is used to document information about the worker's primary (more than 50%) job function. This information is used to decide if this worker is subjected to Wisconsin Administrative Code DCF 43.
    1. To insert a new row in the Worker Role section, click the Insert button. If there was a previous row already existing, enter an "End Date" to enable the Insert Button.
        i. If a new role is being added the end date of the previous role should be yesterday's date.
    2. If the Worker Role is either Case Worker or Supervisor and the Primary Function is CPS, the 'DCF 43 Required' checkbox will automatically be checked, and this worker will appear in the CM1801 – DCF 43 Worker Training Report.

If entering a new worker, the following message will appear upon saving the page. Clicking "Yes" to this message will create a security request to your Security Delegate. Clicking "No" to this message will not create a security request automatically. This security request page allows for the linking of MyWisconsin ID and the assignment of Job Class including approval level, User Group, and other security levels. If "No" is selected, a security request will need to be manually created for the worker. Once saved, use the Create hyperlink to add the image of the signed eWiSACWIS User Agreement.



The User Agreement Image should be uploaded for any new or earlier roles a worker has/had. This will be stored in the system. The paper copy and/or electronic file used to load the image does not have to be stored once the image is uploaded. This record will be kept in the worker information page and should only be deleted if the wrong upload was saved. The Date of Document should be entered as the date the document was signed. Click the Browse button to find the file and add a comment if applicable. Click Save and Close to return the Maintain Worker Information page. Go to the Worker Security tab to access the security request.

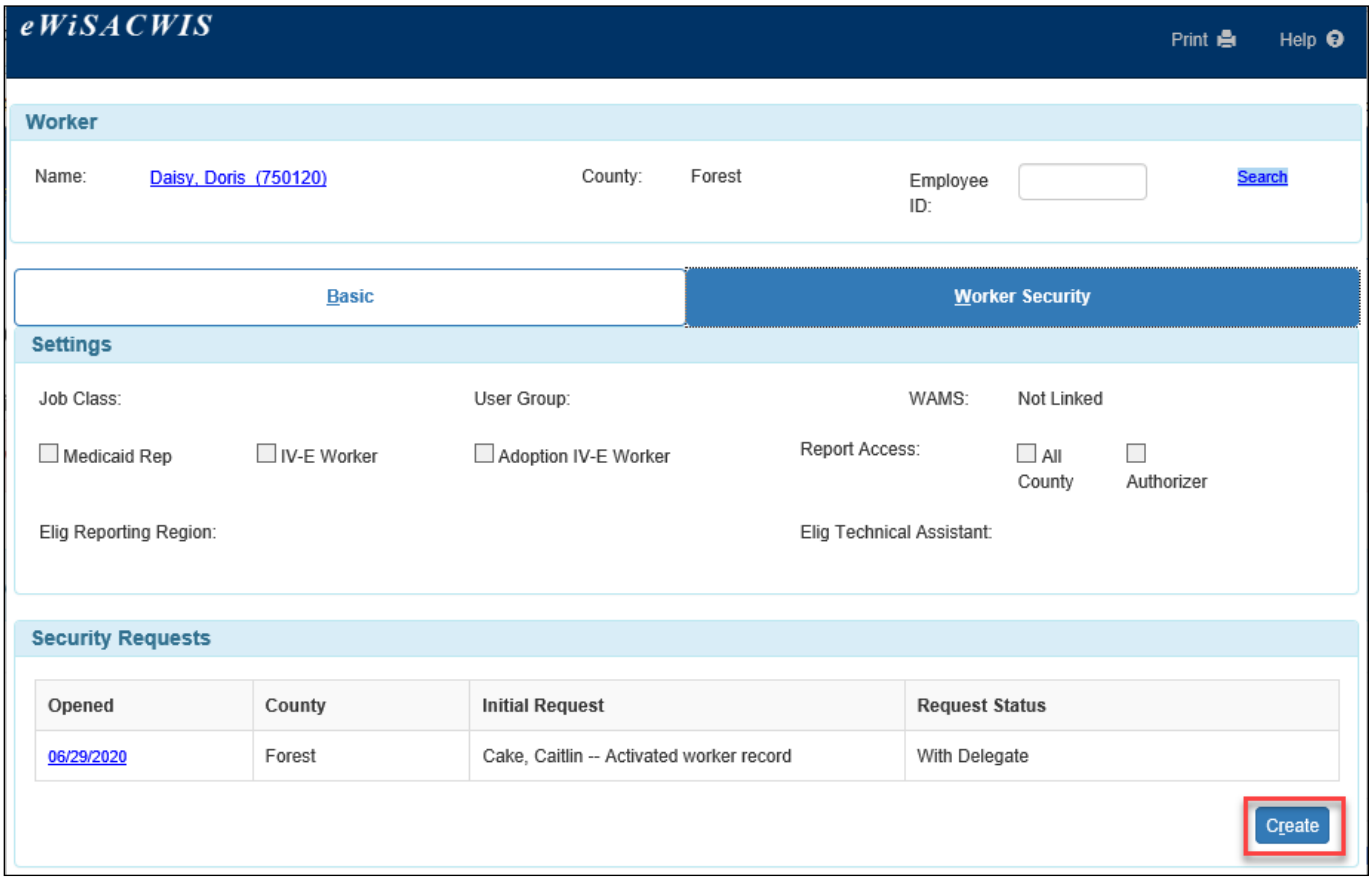


Worker Security Tab

The Worker Security tab displays details related to the worker's security.

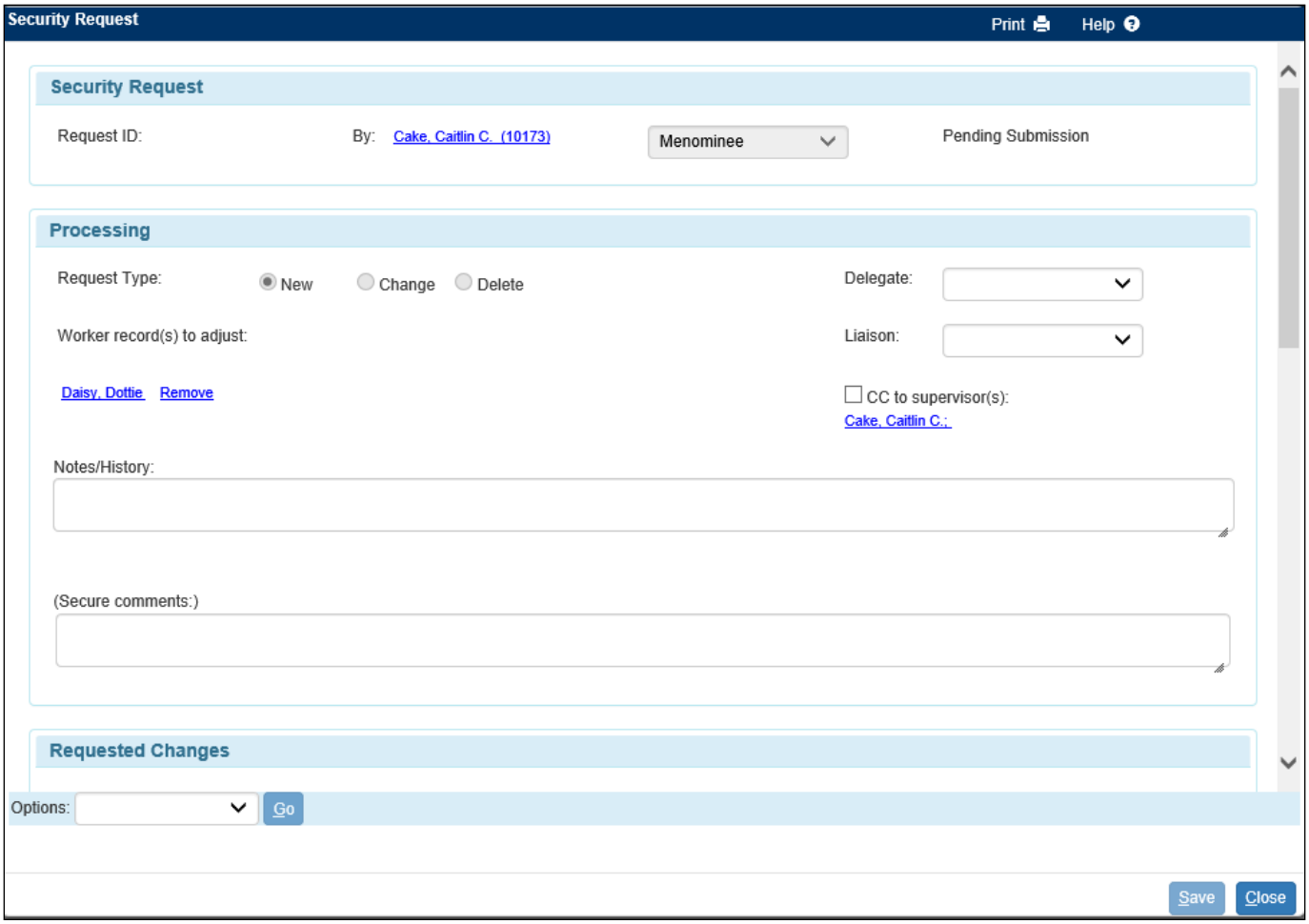
1. To access the created worker security request, click the date hyperlink with the date of the request.
2. To change worker security, click Create, and the Security Request will open.

Note: Do not click Create if a security request was created by clicking "Yes" when the worker was activated. This will create a duplicate "New" request.

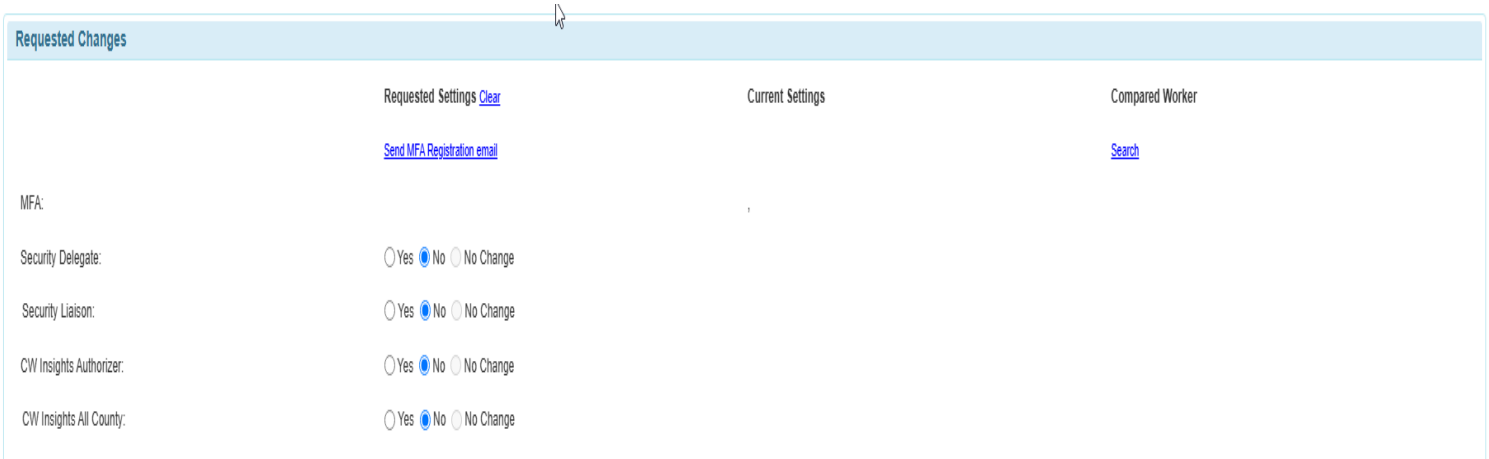


3. On the Security Request page, choose the Request Type. If the worker is already linked to MyWisconsin ID, the Security Request page will default to "Change". If newly activated on the Basic tab, it will default to "New". If newly inactivated on the Basic tab, it will default to "Delete".

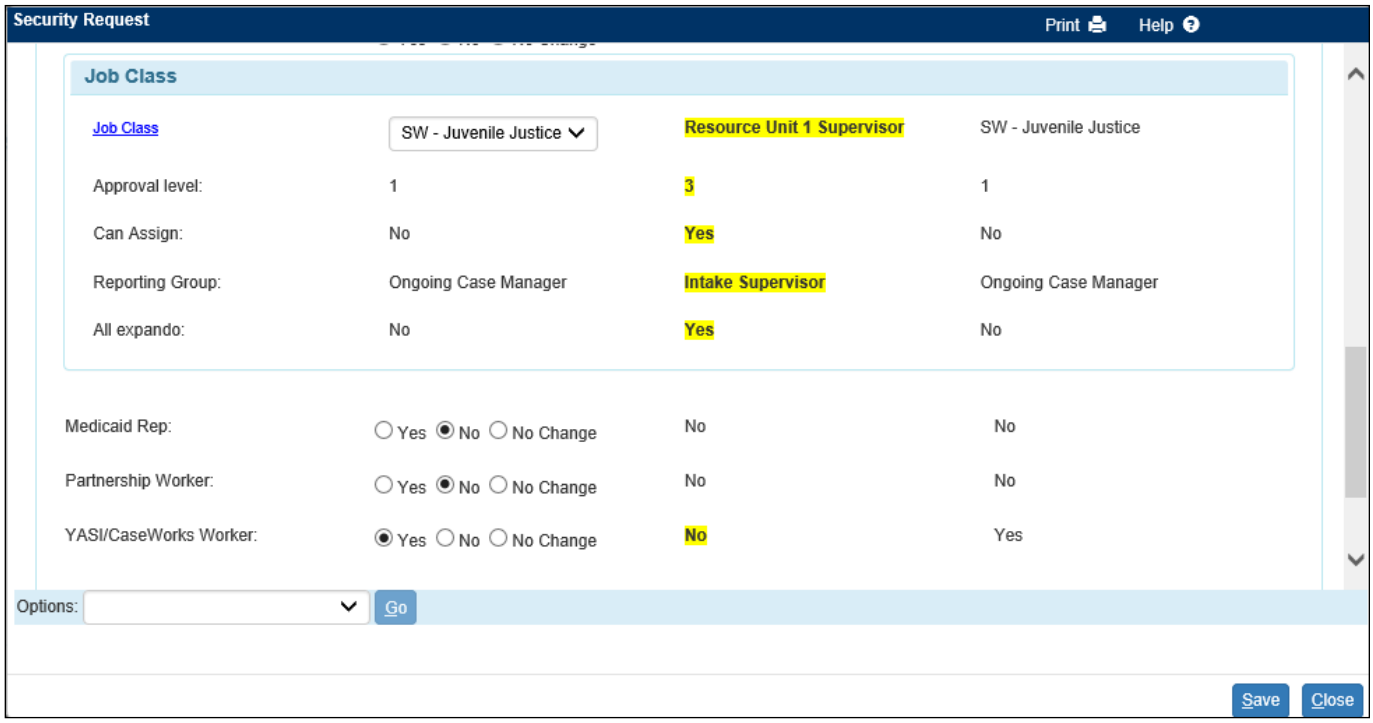
Note: Inactivating on the Basic tab will automatically create a "Delete" request that must be approved to remove the link to MyWisconsin ID



4. Under the Requested Changes section, options exist to view a worker's current security settings or change a worker's security.



5. When changing security settings under the Requested Settings column, differences between the change and the Current Settings are highlighted in yellow.



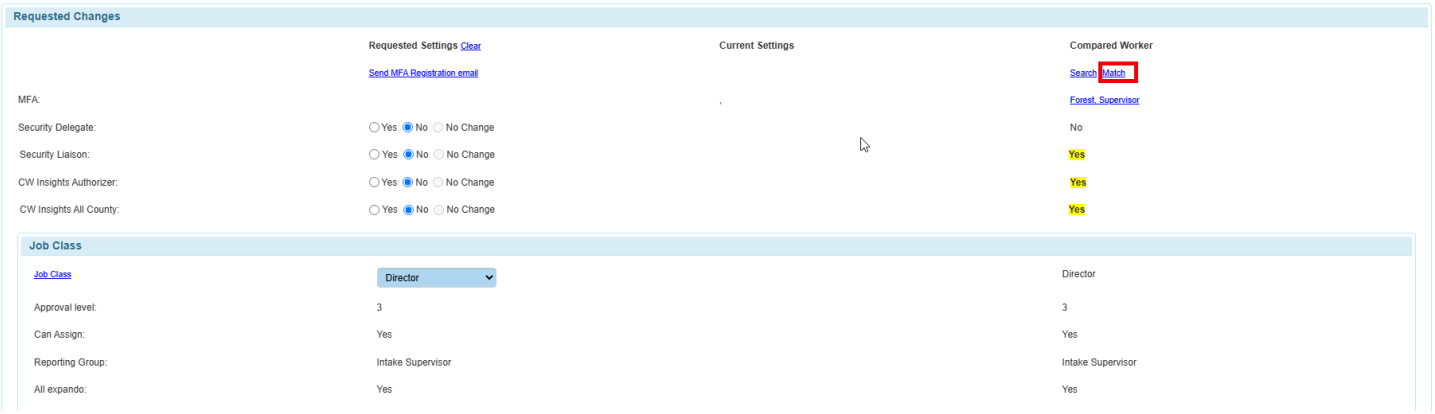
3. To match worker security to another worker, complete a worker search by clicking the Search hyperlink under the Compared Worker column.

Note: On the Worker Security Search page, the Status option allows for search by 'active' and 'inactive' workers.

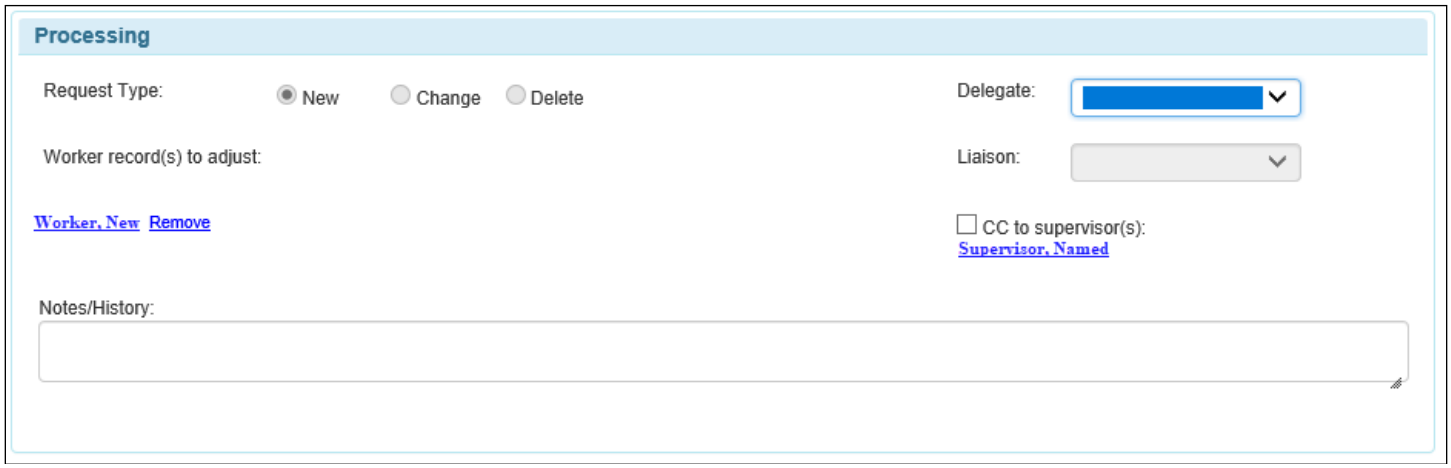
6. If a worker is chosen for comparison, they will appear on the Security Request page, in the Requested Changes section, in a column called, "Compared Worker". In the Current Settings and Compared Worker columns, yellow highlights show differences between requests in the Requested Settings column.

Note: To update all Requested Settings to the same security as the Compared Worker, click the Match hyperlink under the Compared Worker column. Verify all selections are appropriate for the new worker. YASI/CaseWorks security should only be granted to workers who have been trained.

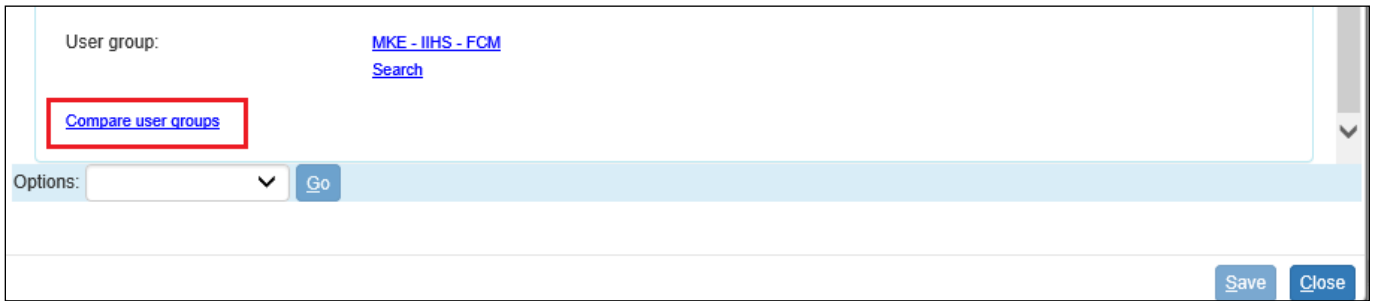
7. Any page changes saved will appear in the Processing section. The Processing section shows a history of saved changes and narratives. Narrative can be entered at any time prior to approval, and can be used for communication between the supervisor, security delegate, and state security liaison.



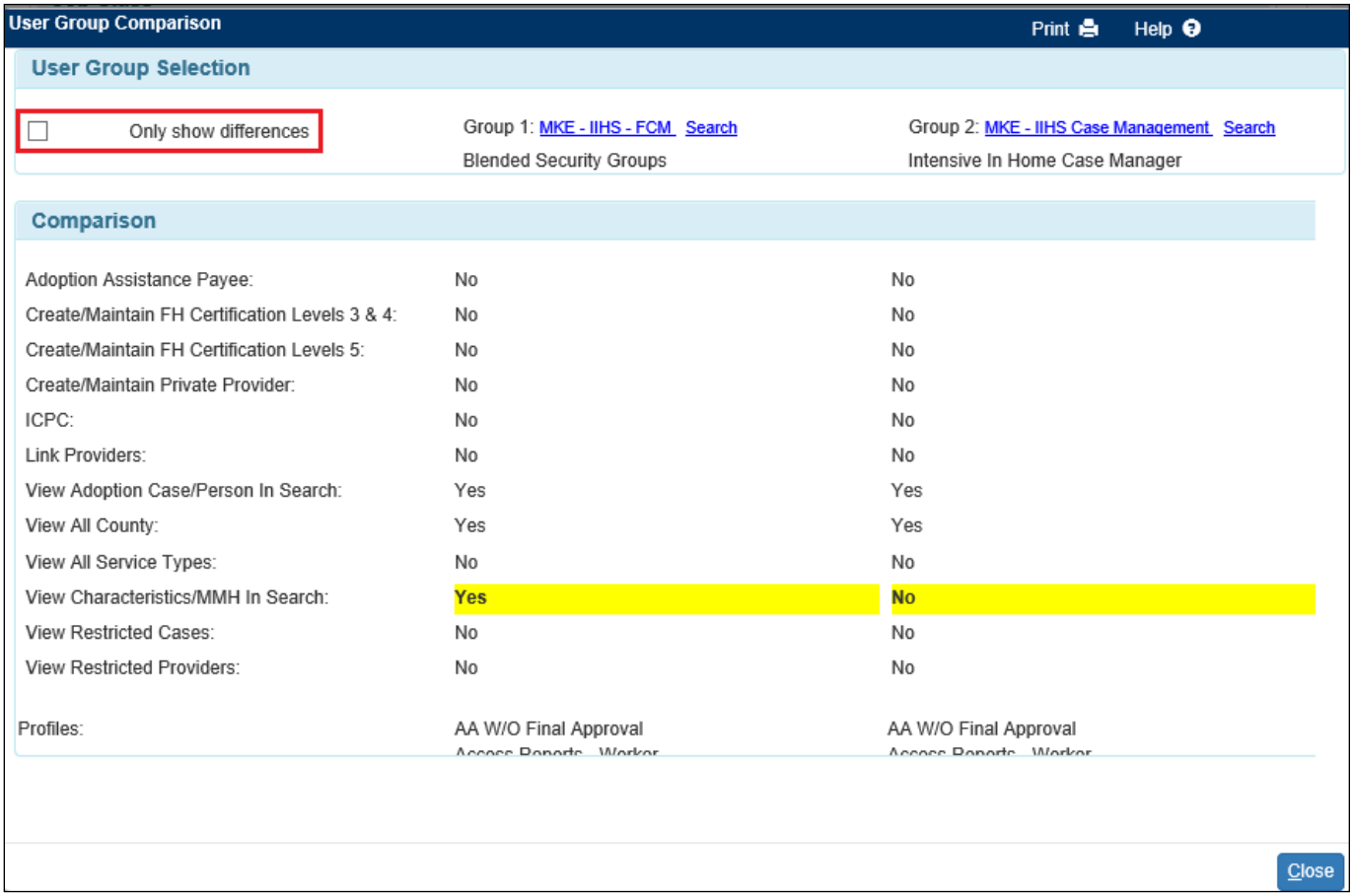
Note: A supervisor will only be able to enter text on the Security Request page.



8. A Compare user groups hyperlink will appear in the lower left corner of the page. Selecting it will open the User Group Comparison page.



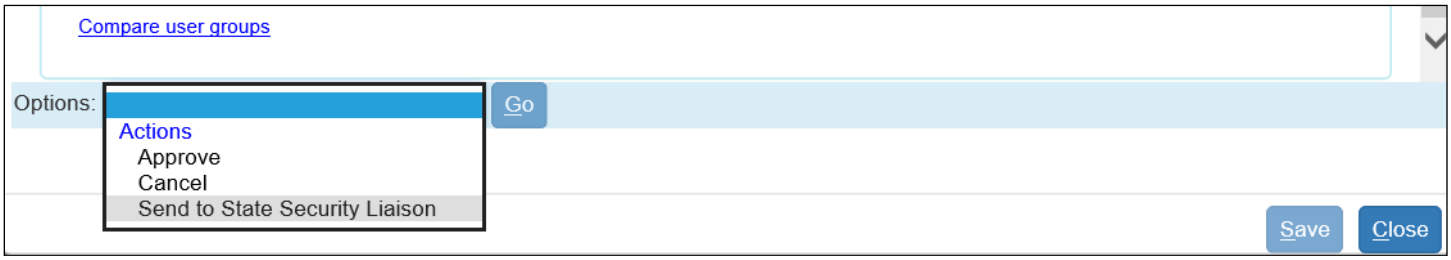
9. The User Group Comparison page compares worker's current user group to the requested user group. Checking the "Only show differences" checkbox will remove all profiles that are the same between the two user groups. The yellow highlighted area emphasizes differences.



Options: Approving or Canceling or Sending a Security Request

To approve or cancel the security request using the Options dropdown, there are 3 options:

- **Approve:** When Approve is selected, the system will decide if there are any requested security changes that require a State Liaison approval. If the requested security does not require a State Liaison's approval, the request will automatically be approved when Approve is selected. At that time of approval, the page will freeze, and any further changes will require a new security request.
- **Cancel:** Choosing to Cancel the request will freeze the request as not approved. The request will continue to be viewable for future reference.
- **Send to State Security Liaison**: Choosing to Send to State Security Liaison will automatically send the security request to the State Liaison.



Note: Click Save without using Options to save narratives without approving or canceling. This will save the changes without acting on the request.

Checking the Security Request Status

The Request Status column found on the Worker Security tab of the Maintain Worker Information page gives the current status of each security request. This is an efficient way for a Security Delegate to see all security requests for a worker.

