SYNC User Guide

Supporting Youth aNd Children

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Introduction

SYNC or, Supporting Youth and Children, is a website created for group care providers to streamline referral processes and communication, as well as keeps records of current and past placements in one secure system. Sync also allows uniform referral information to reach providers at the same time, automates documentation of where referrals were sent and what those providers' decisions were, provides a repository of referral records for providers to aid in tracking information about the number of referrals received, and occurrence of multiple referrals on the same child, and it eliminates duplication of data entry for placing agencies by automating communication in to eWiSACWIS (electronic Wisconsin Statewide Automated Child Welfare Information System) upon receipt. Child welfare agencies with full access will electronically submit referrals for group care placement through eWiSACWIS rather than submitting them manually via email or fax. eWiSACWIS is a website used by child welfare agencies to document and manage a family's involvement in child welfare. Group care facilities in Wisconsin who request access will be provided credentials to securely access the SYNC website.

SYNC Website: https://apps-okta.dcf.wisconsin.gov/sync/LOGON.do

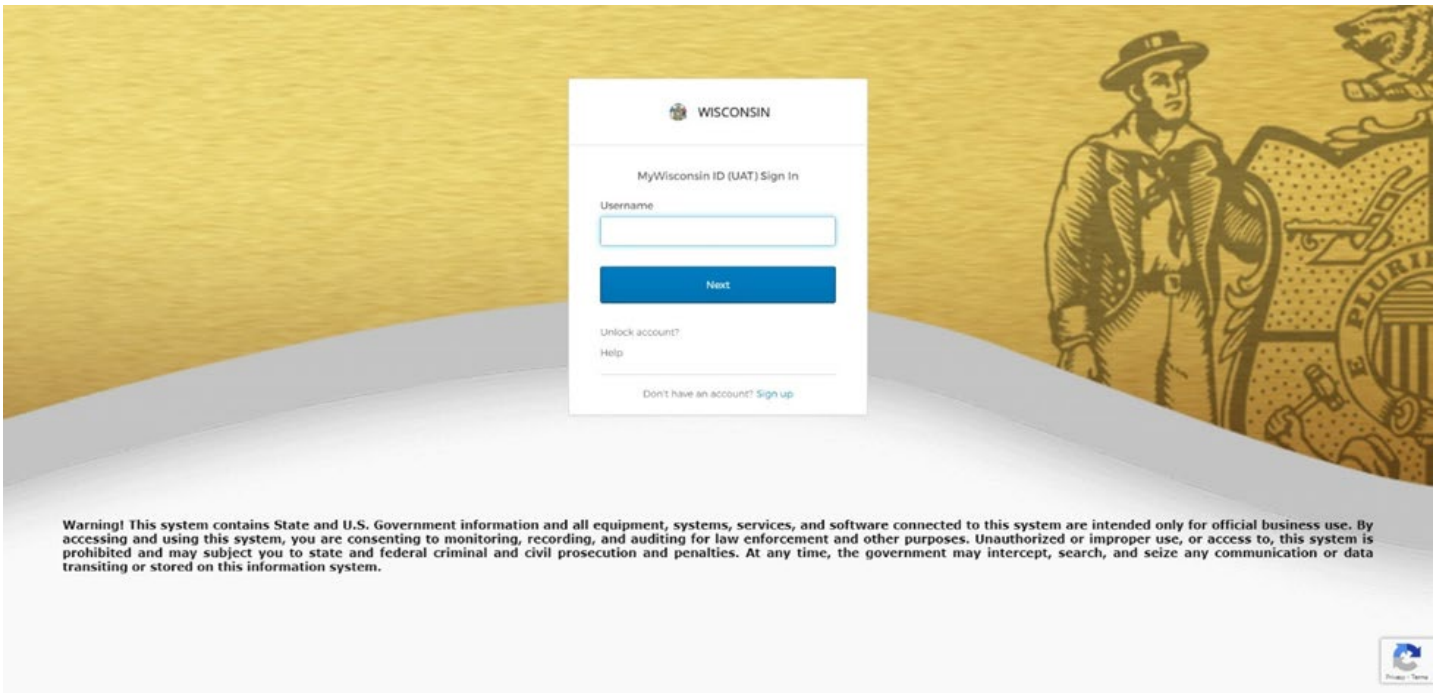
Requesting SYNC Credentials

Group care facilities should designate a SYNC Administrator. This individual will determine who, within the agency, will have access to SYNC and what level of access will be delegated to each individual. For example, access and delegation may range from review only to the ability to approve/deny referrals, or to document and transmit information about a youth back to the child welfare professional. The SYNC Administrator is the primary contact for any breaches of User Agreements, security issues, or confidentiality issues. To request access to SYNC and assign a SYNC Administrator, group care facilities must complete and sign the External Agency Agreement on Access to SYNC (DCF-F-5618) and then upload the agreement into PIE. The External Agency Agreement on Access to SYNC (DCF-F-5618) can be found on the DCF Forms Search page.

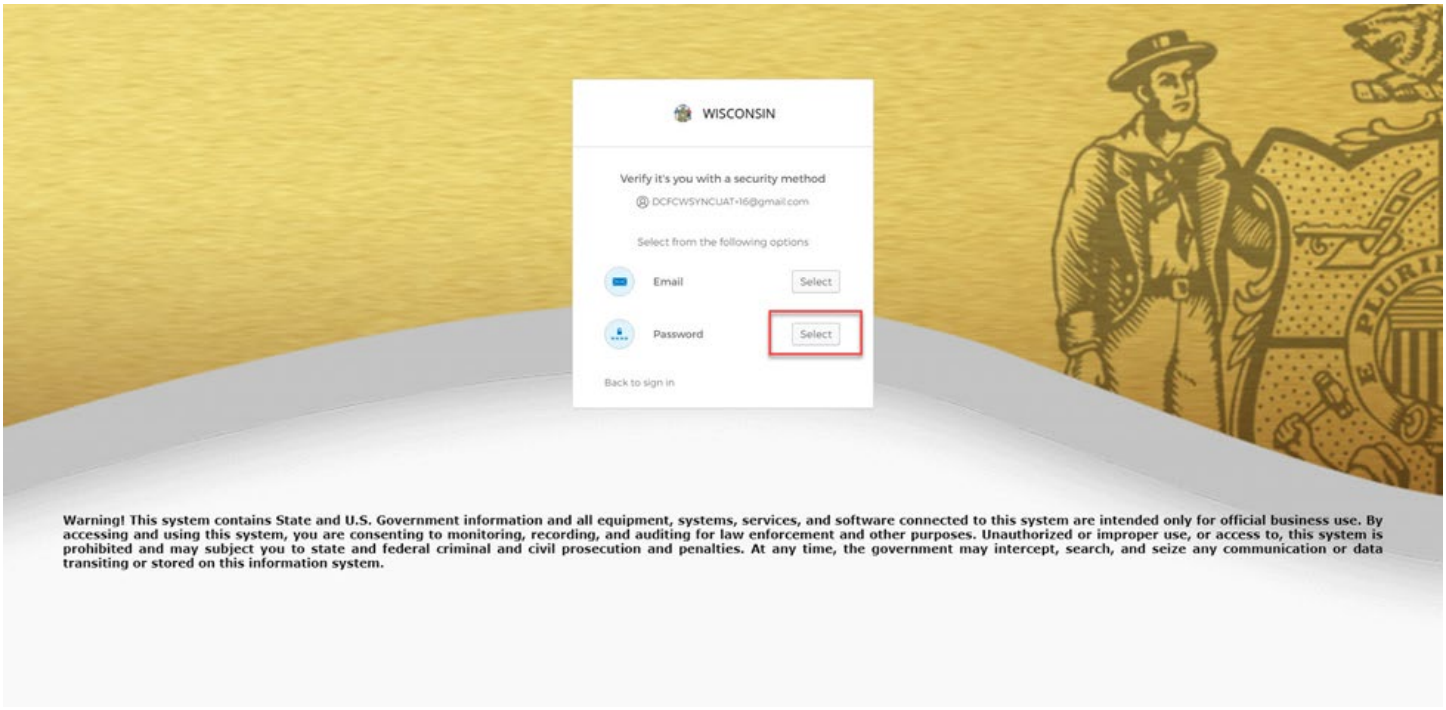
Everyone designated by the SYNC Administrator with a signed and submitted SYNC User Agreement will have access to SYNC. All staff who are responsible for reviewing and responding to placement referrals of youth to receive treatment services by the facility should be given access.

Login

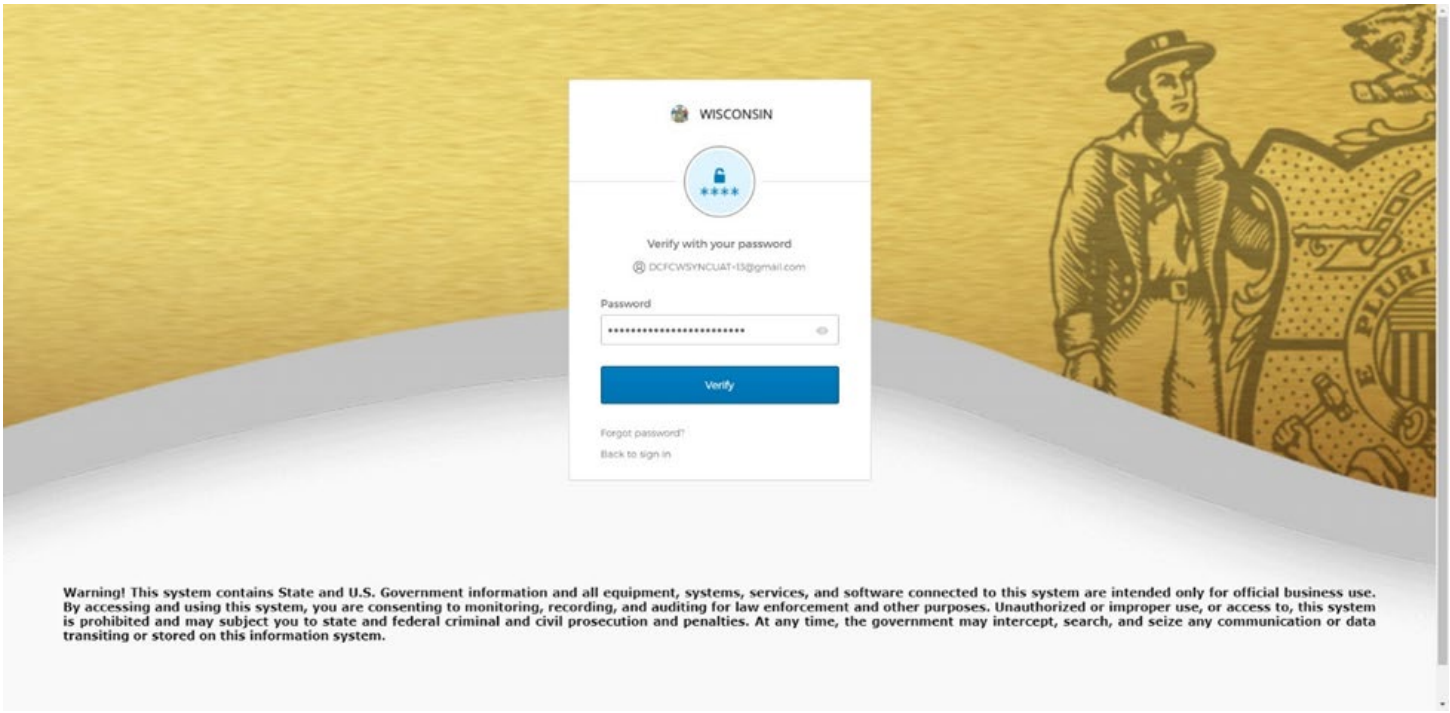
When the SYNC website is launched, this page will appear. Enter your MyWisconsin ID username and click next. If the user does not have a MyWisconsin ID, create one at https://apps.wisconsin.gov. For assistance in creating a MyWisconsin ID, visit https://det.wi.gov/Pages/MyWisconsin_ID_Self_Registration.aspx.



Select password to verify the user.

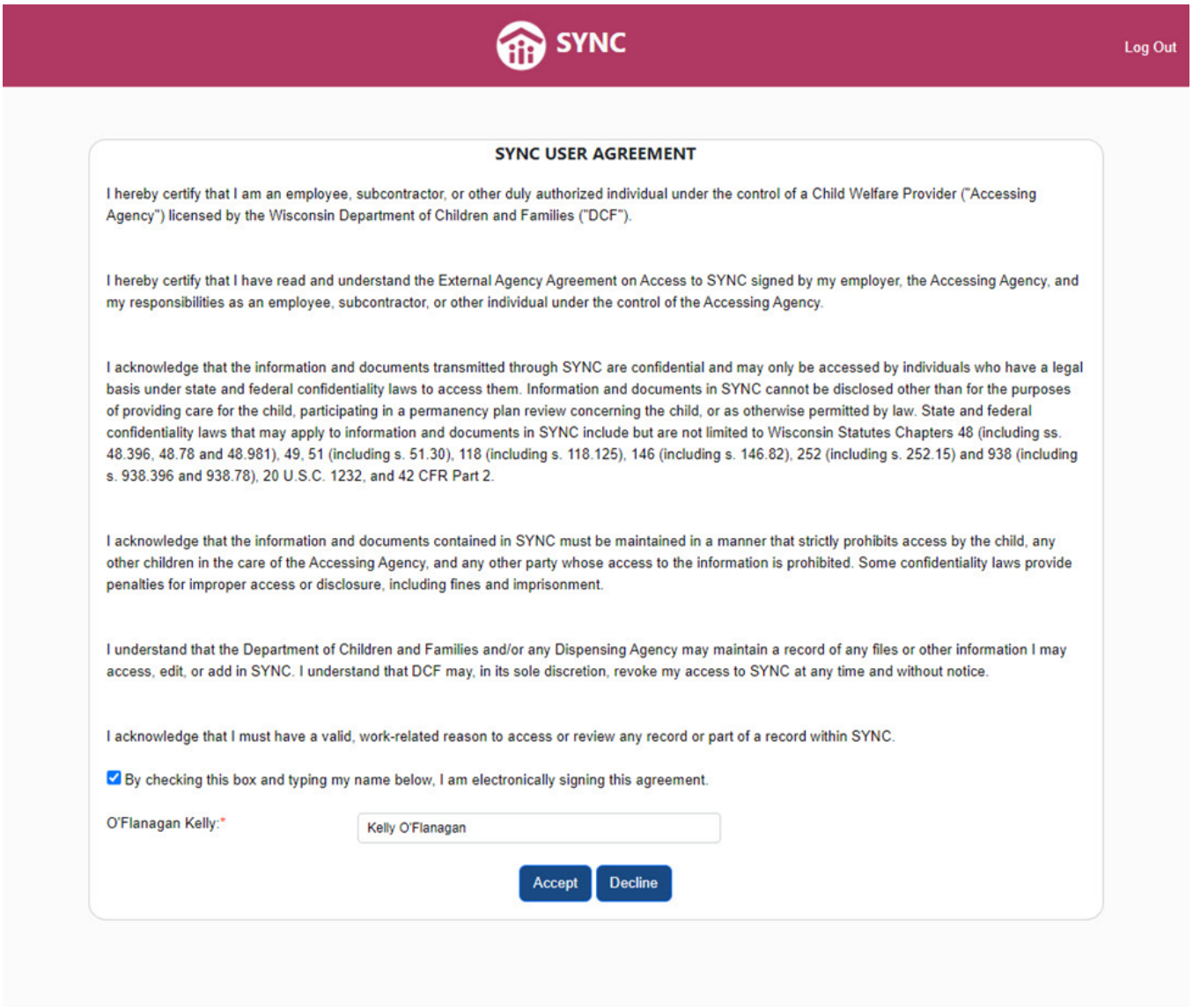


Enter the password created with your MyWisconsin ID account.



SYNC User Agreement

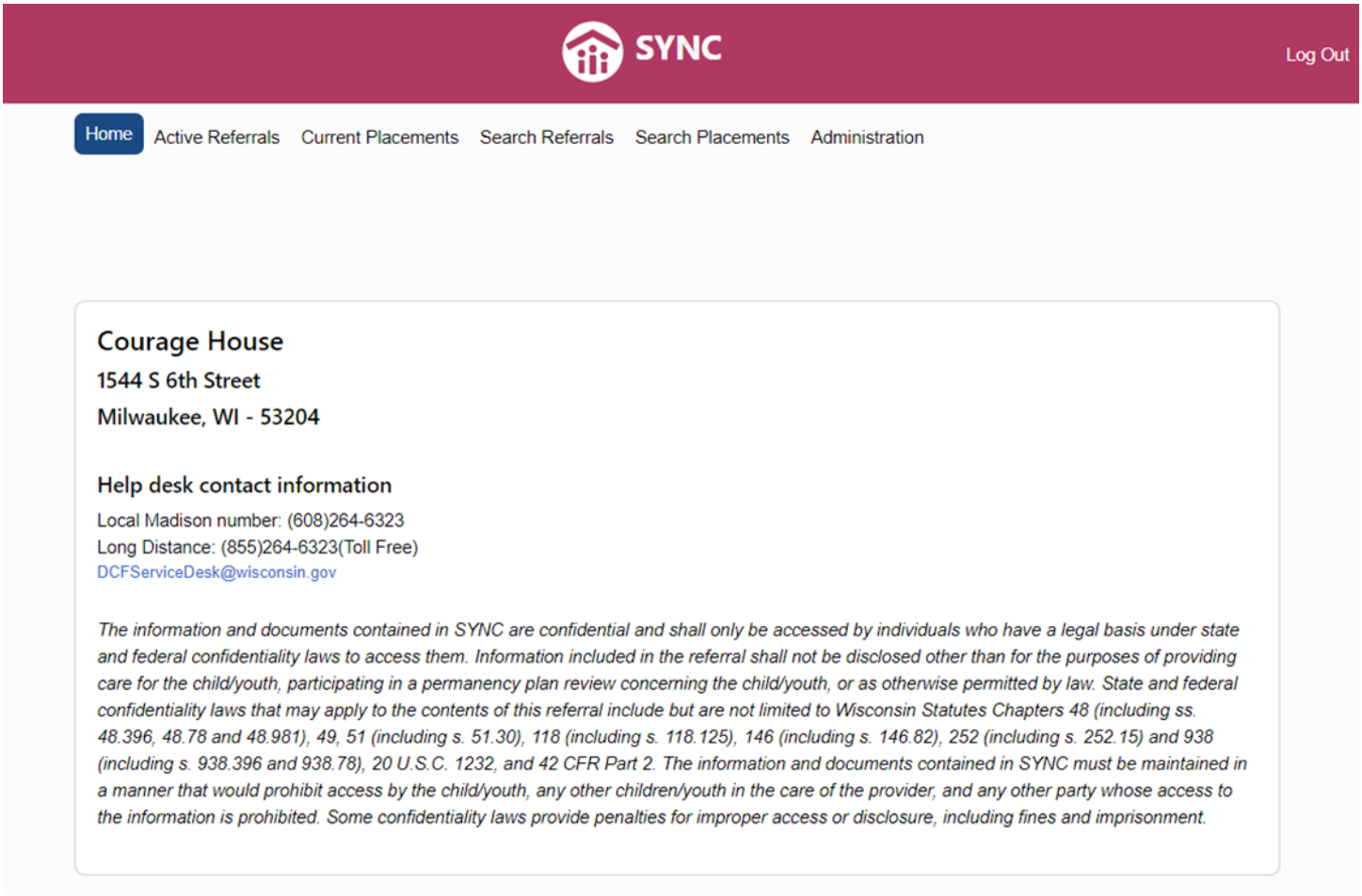
When logging into SYNC for the first time, users will be presented with the digital user agreement. The user will need to acknowledge that they have a valid work-related reason to access or review any record or part of a record within SYNC by checking the box and electronically signing.



Home Page

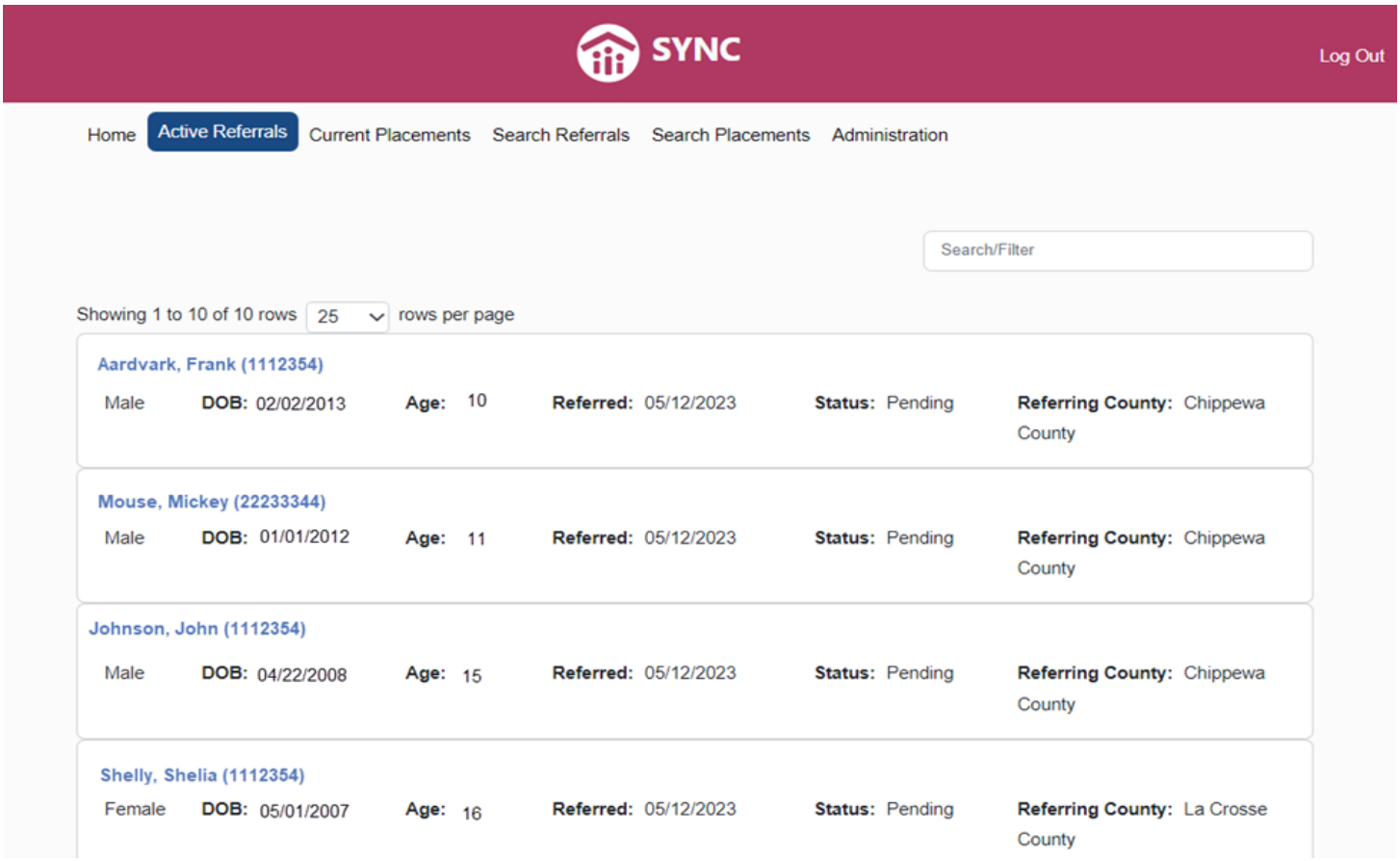
After a successful login, the user will be brought to the Home Page. The group care facility's name and address displays as shown followed by the Help desk contact information and a confidentiality statement. The user should contact the help desk if they experience any issues using SYNC.

> ***Note**: The tabs on top display based on security. What the user sees will vary based on their security levels. For example, only SYNC Administrators are going to see the Administration tab.



Active Referrals

The Active Referrals page displays a table view of all the current, active referrals that have been shared with the provider. The table displays the child's/youth's name, gender, birthdate, the referred date, and the referring agency. Use the search box to enter any part of the referral name or ID to filter the results displayed on the page. Clicking the name of the referred child/youth will launch the referral.



Use the filter feature to narrow down the active referrals displayed by typing any of the filterable information.

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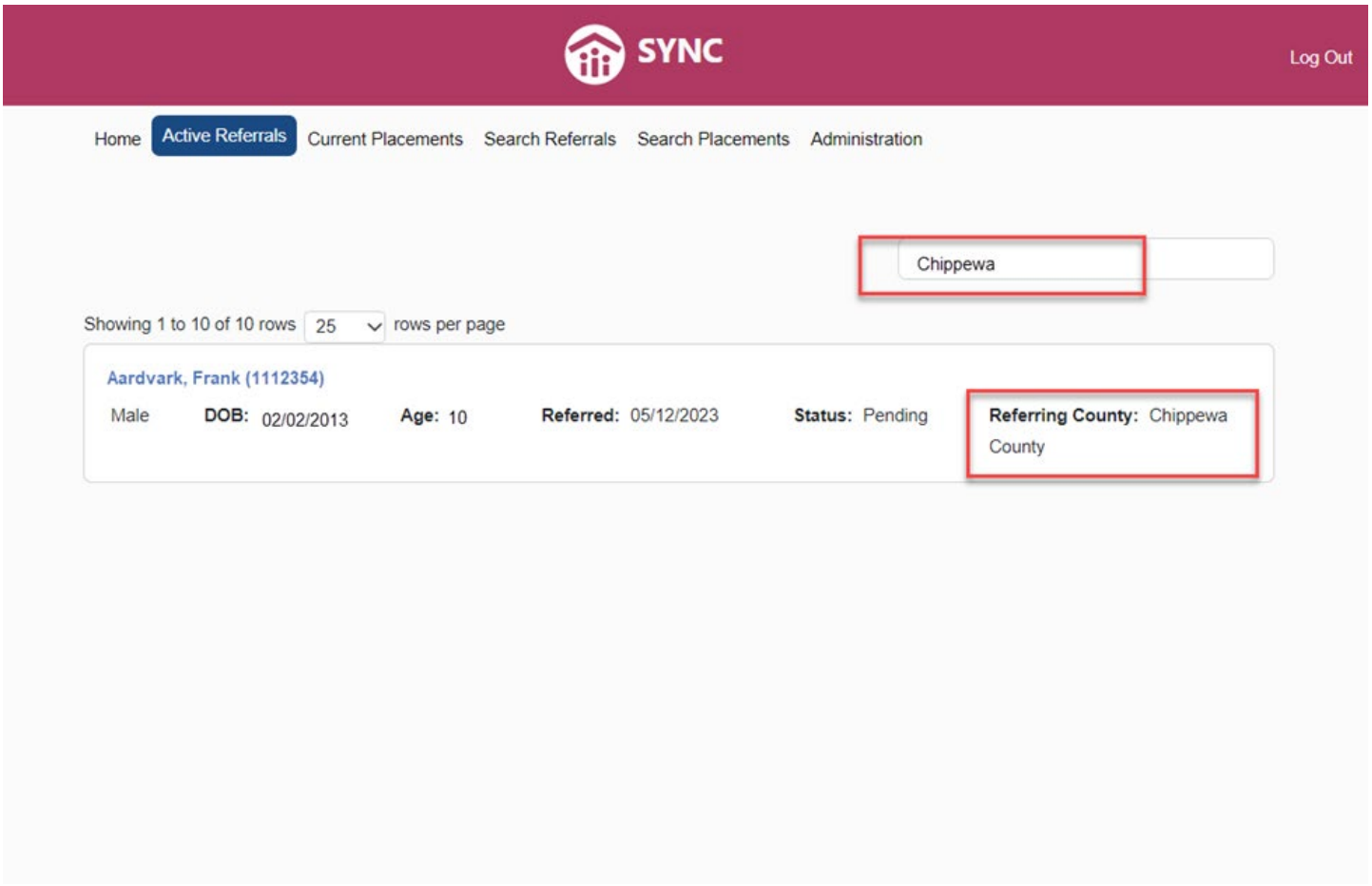
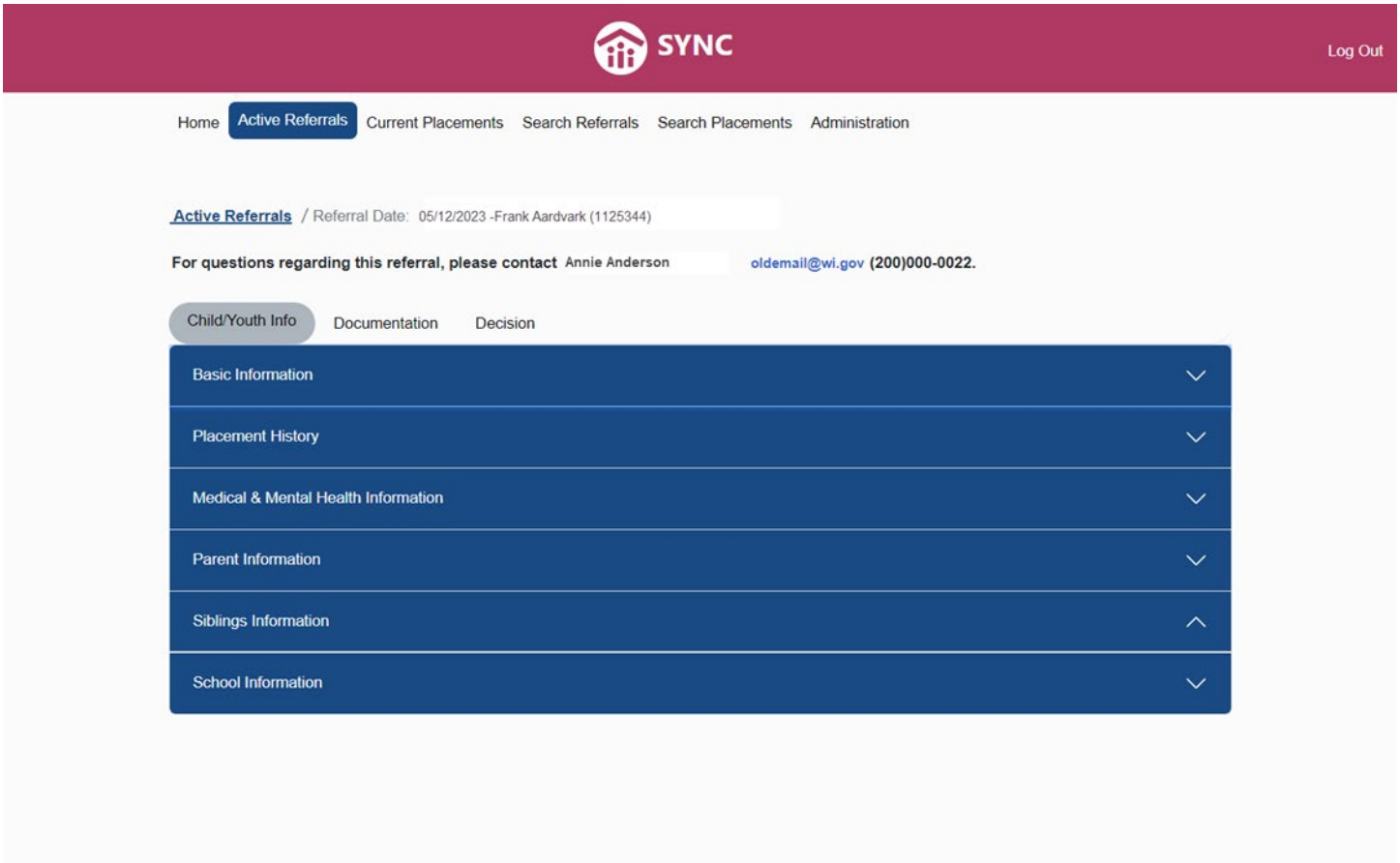
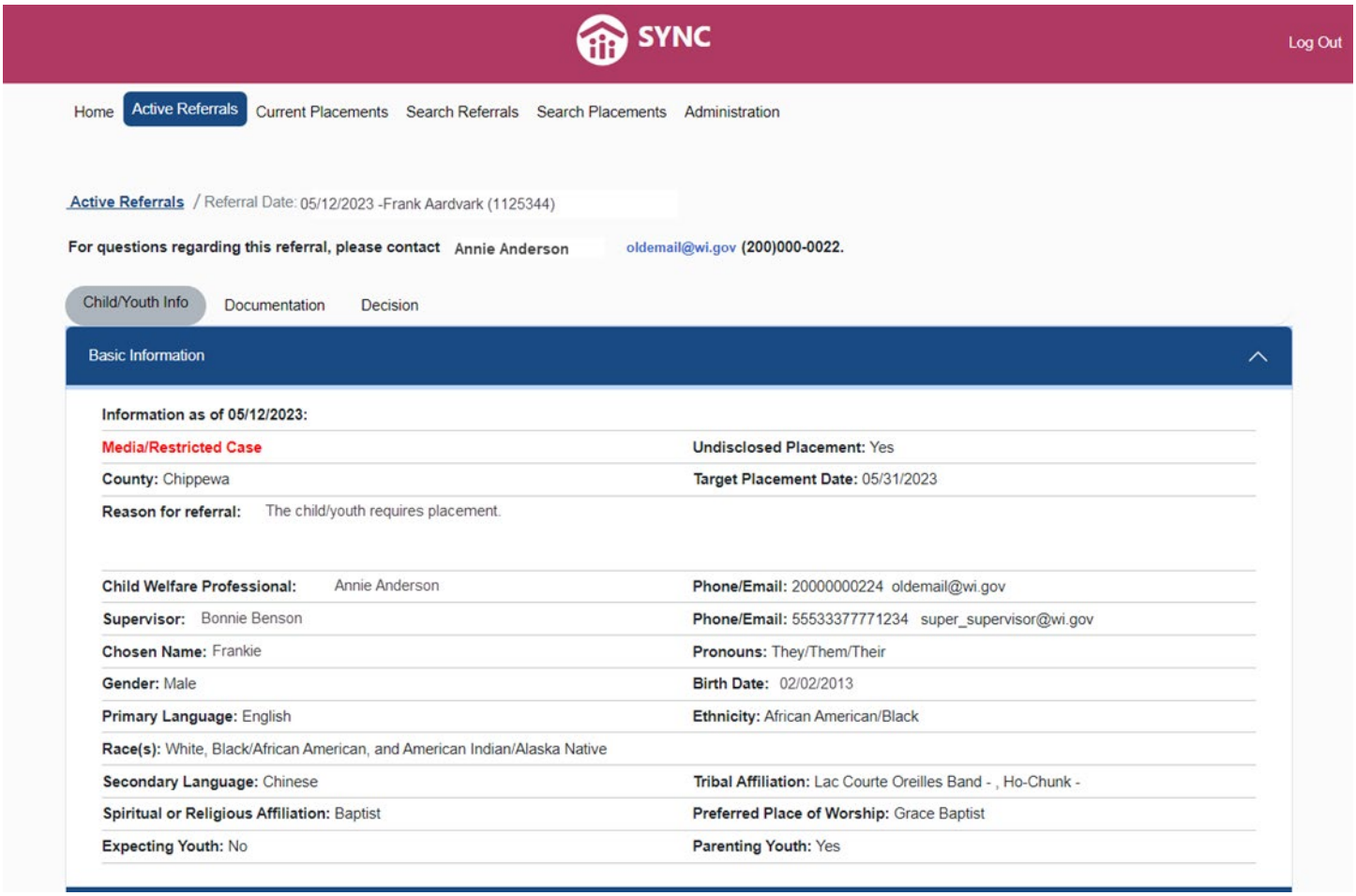

SYNC
Log Out
Home
Active Referrals
Current Placements
Search Referrals
Search Placements
Administration
Chippewa
Showing 1 to 10 of 10 rows
25
rows per page
Aardvark, Frank (1112354)
Male
DOB: 02/02/2013
Age: 10
Referred: 05/12/2023
Status: Pending
Referring County: Chippewa County

Active Referrals – Child/Youth Info

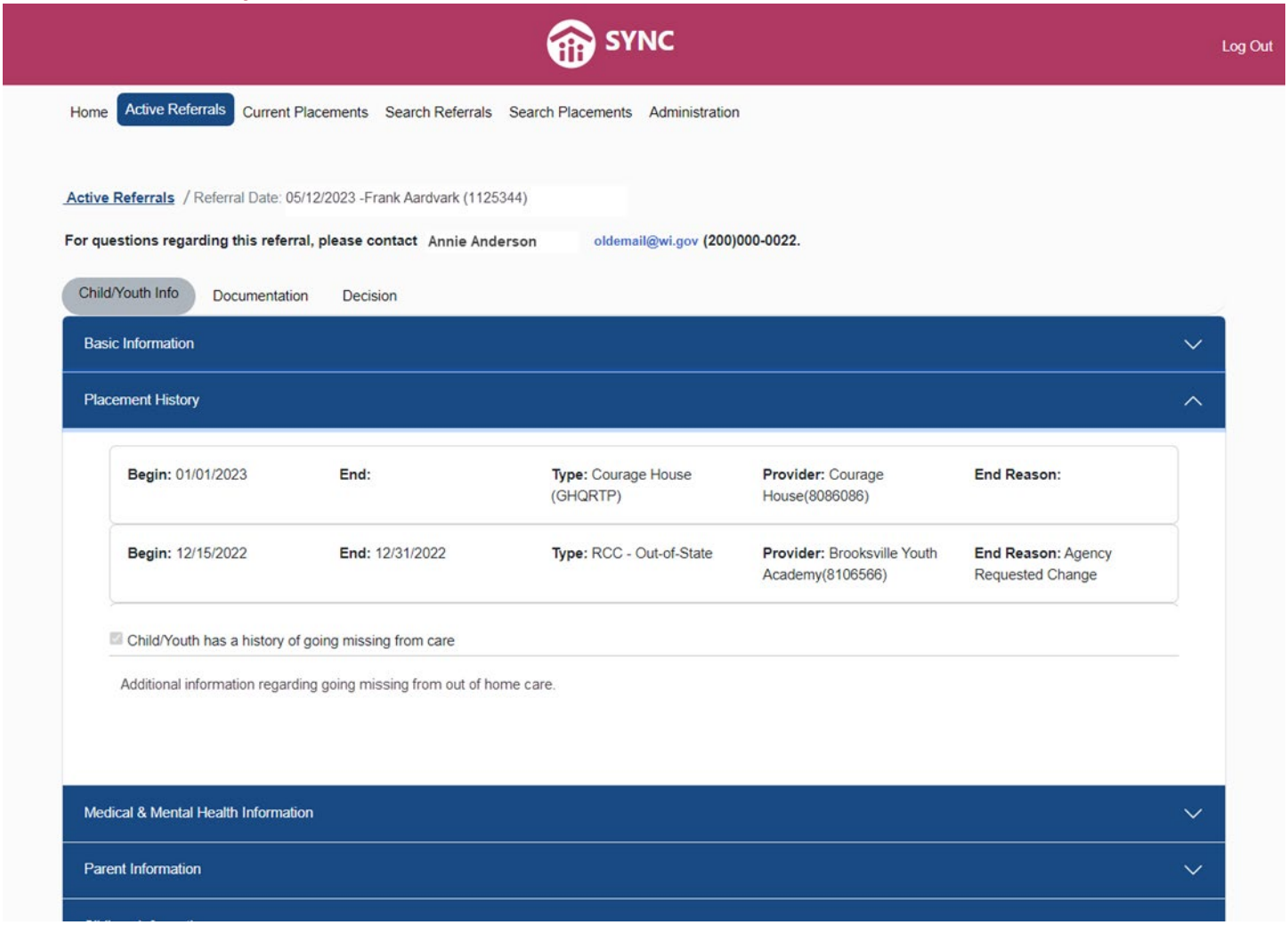
After clicking the name of the referred youth, the referral information will launch. The active referral has three sections: Child/Youth Info, Documentation, and Decision. The first section, Child/Youth Info, contains demographic information, placement history, medical & mental health information, parent information, sibling information, and school information displayed in a drop-down format. Click the drop-down arrows to display the youth's information.



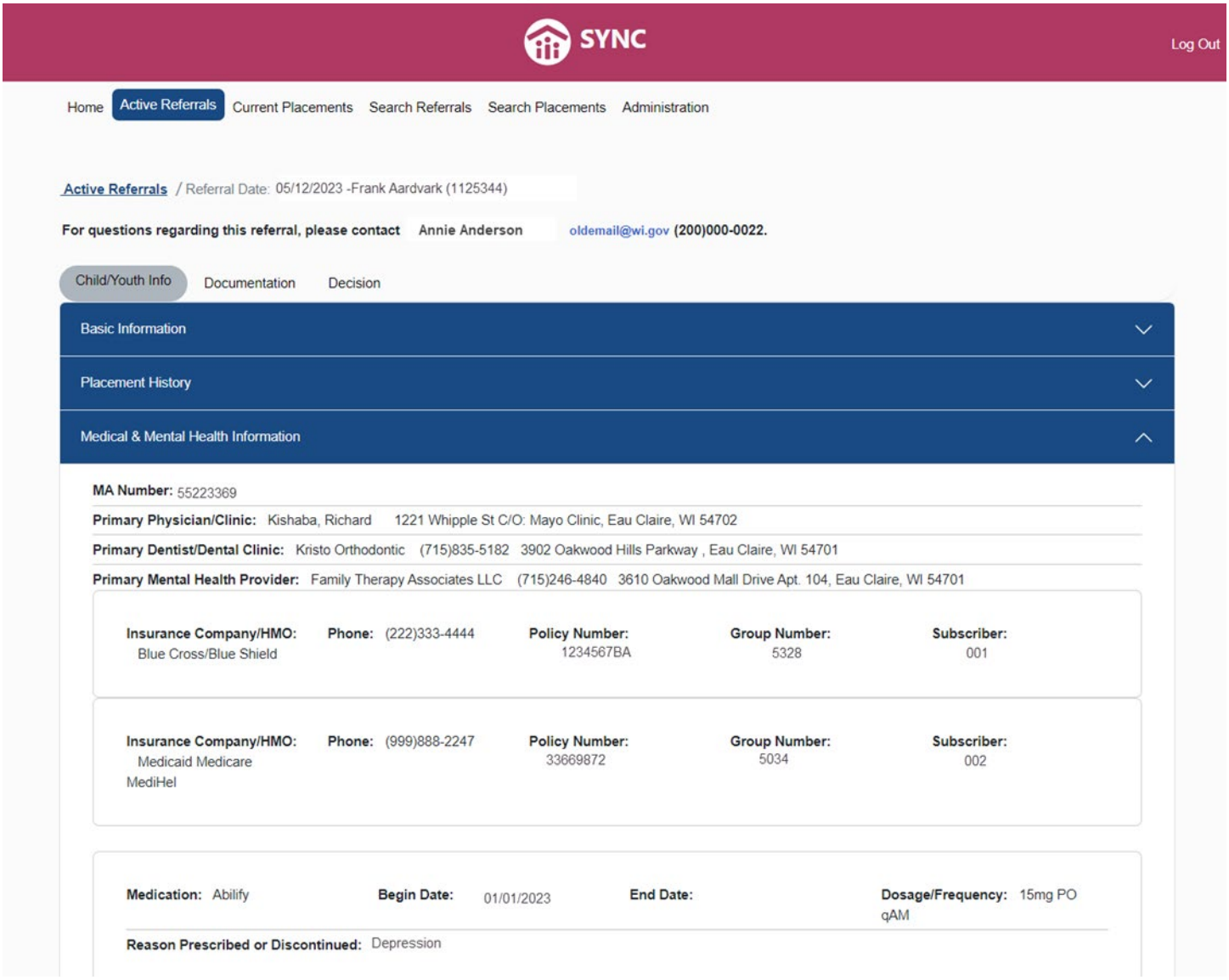
Basic Information expanded:



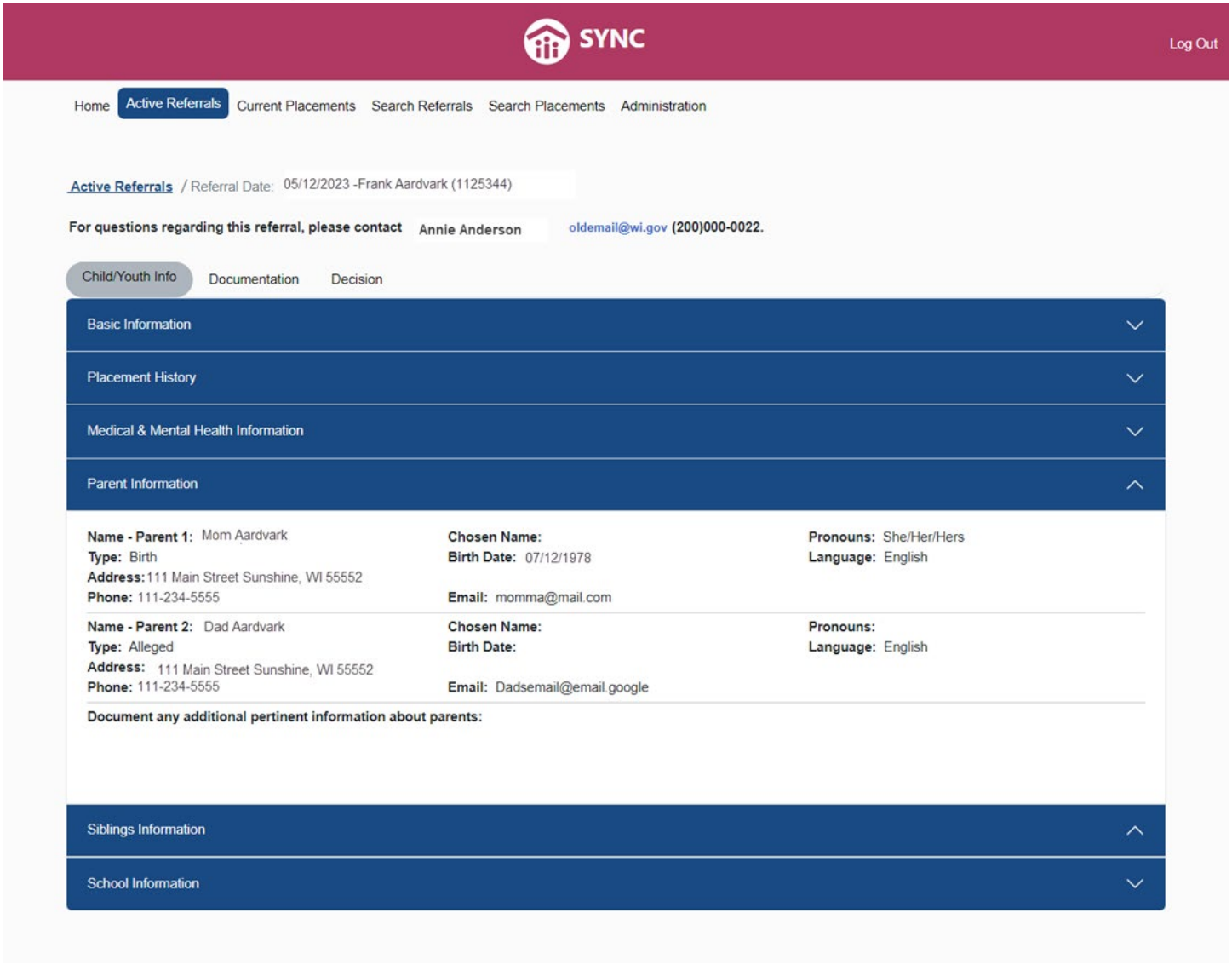
Placement History expanded:



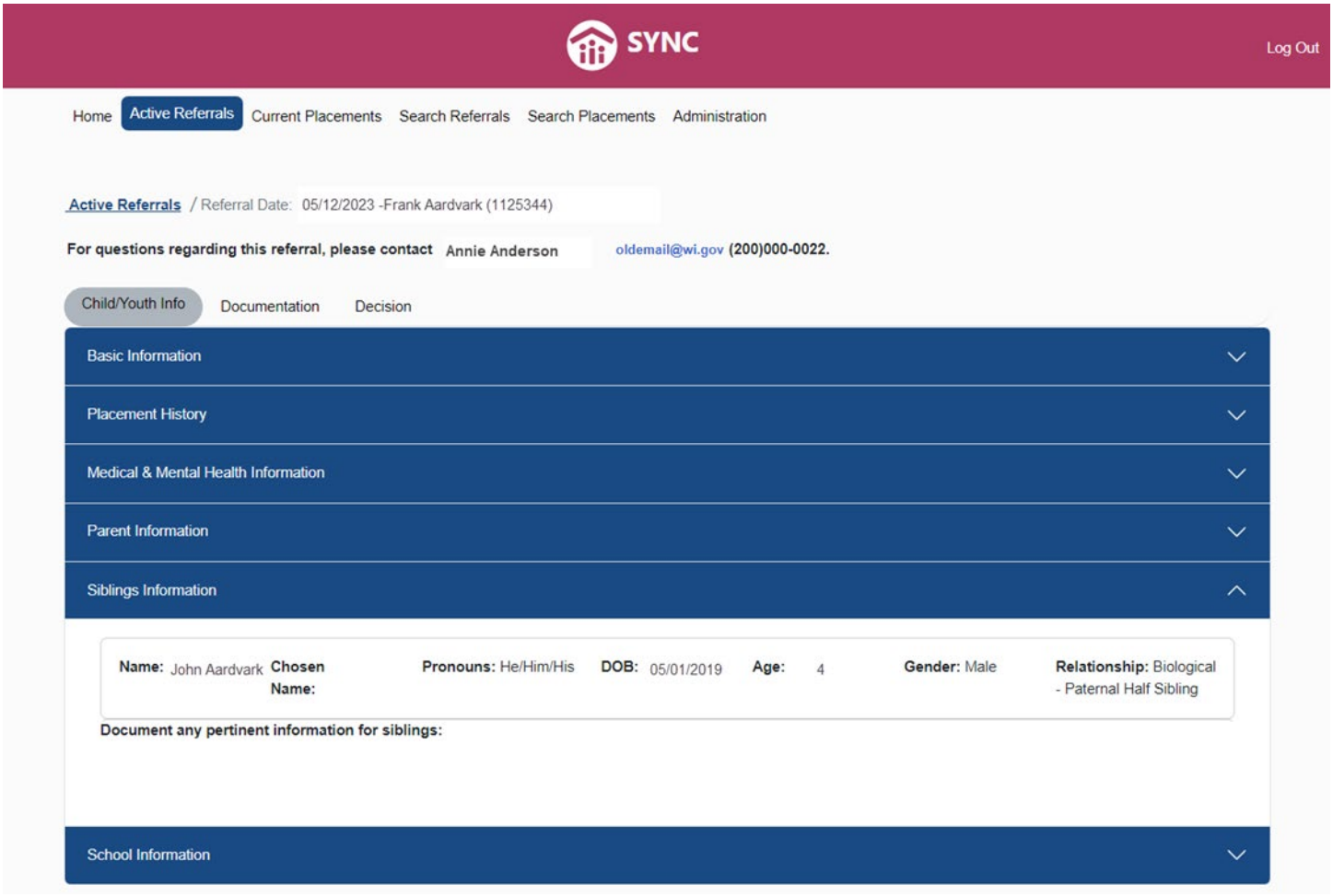
Medical & Mental Health Information expanded:



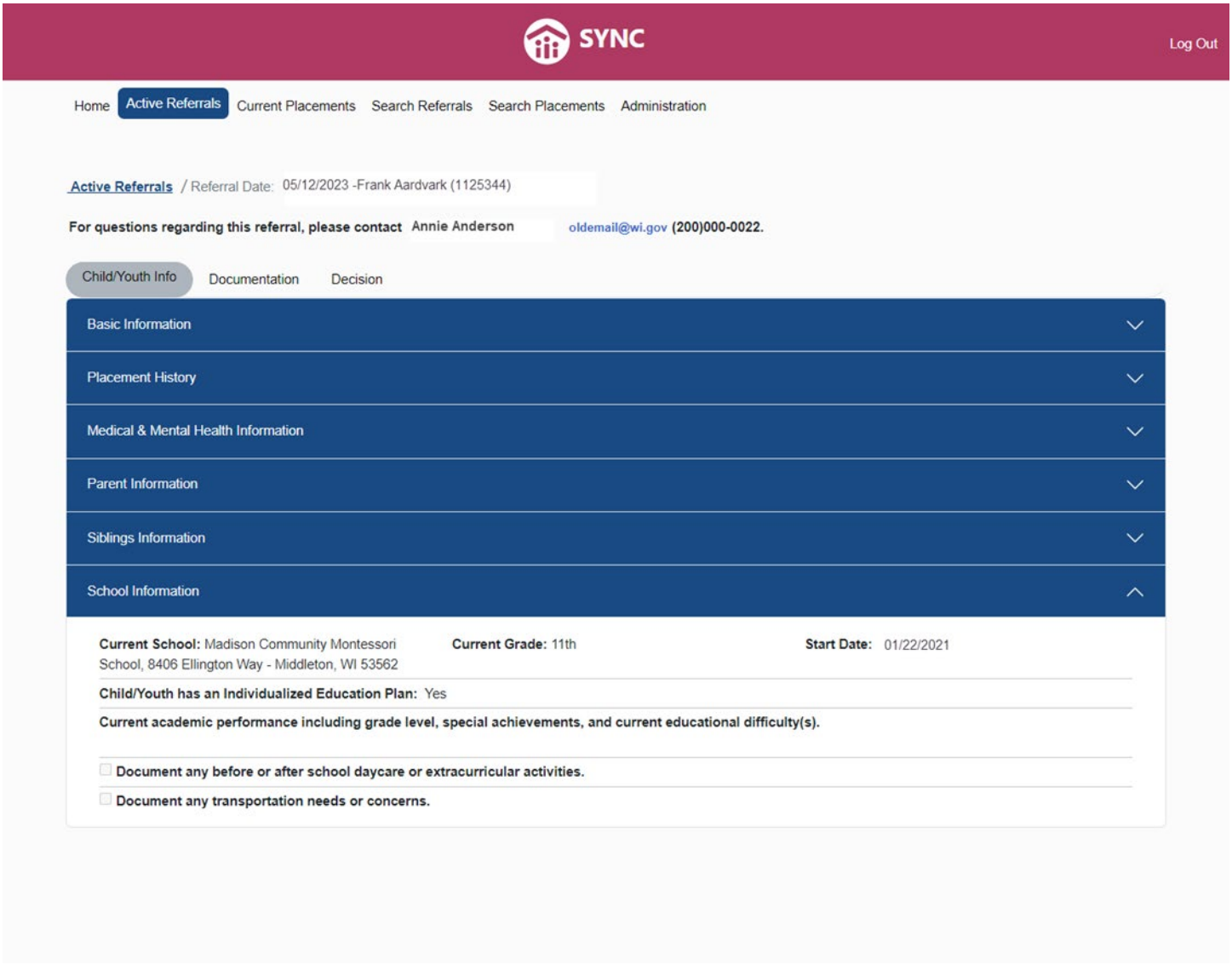
Parent Information expanded:



Sibling Information expanded:

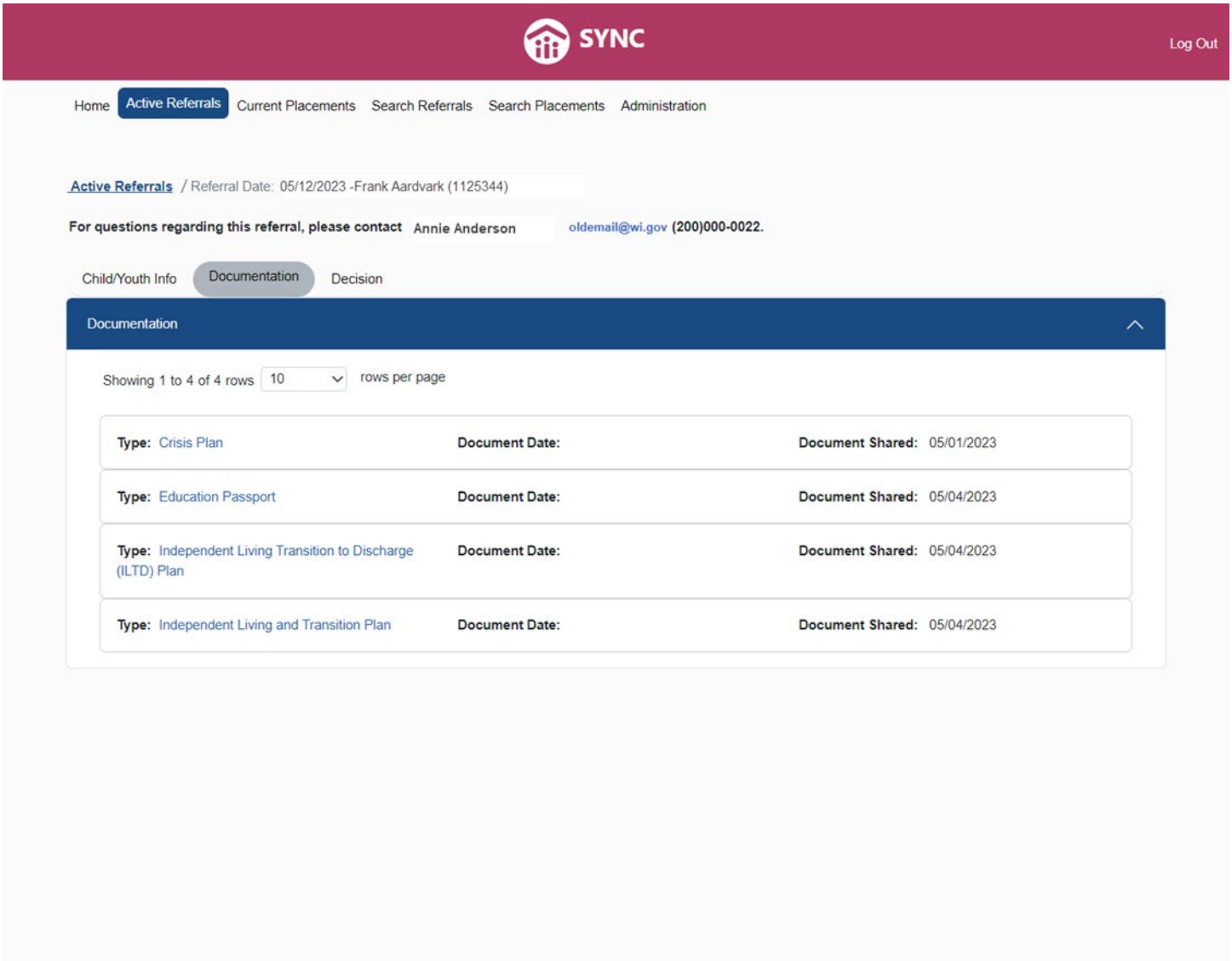


School Information expanded:



Active Referrals – Documentation

The Documentation section is the second section within the Active Referrals page for the selected child/youth's referral. This section displays all documents and images shared with SYNC as part of a referral. Documents and images are displayed in a table format with column names of Type, Document Date, Shared Date, and File Name. The File Name column displays links to the eWiSACWIS documents and images. Selecting the hyperlink for the row will launch the document/image.

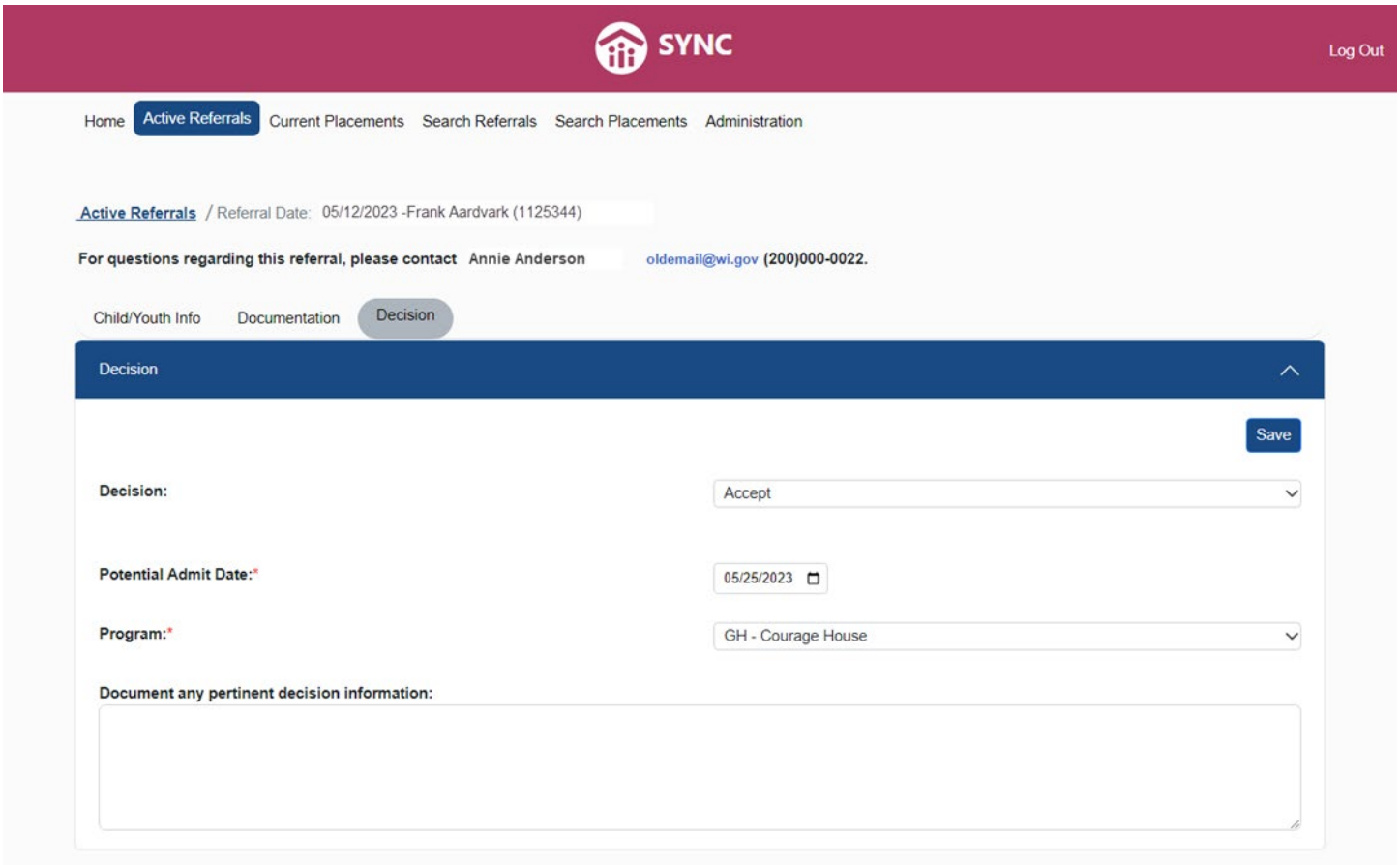


Active Referrals – Decision

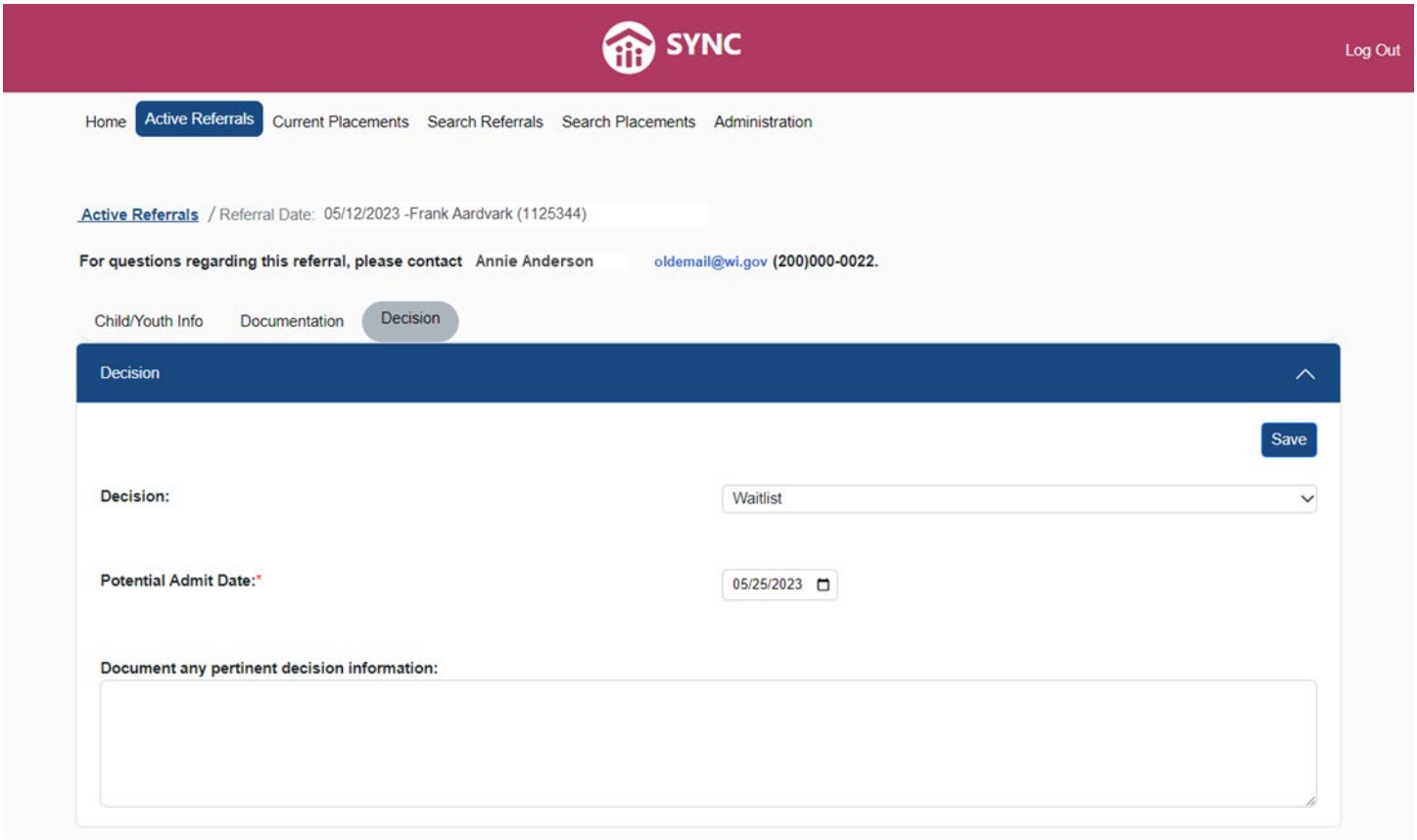
The final section within the Active Referrals page is the Decision section. This section is used to document the provider's decision on the referral. The provider may choose to accept, waitlist, or decline the referral that has been shared from eWiSACWIS. An optional narrative box to document any pertinent decision information will display. Clicking the Save button saves all changes made to the page. Attempting to navigate away from the page with unsaved changes will prompt the user with a message, "Do you want to save your changes?" There will be options for Yes or No.

This page can be accessed by clicking the name hyperlink from the Active Referrals page or the Search referrals page. This page can also be accessed by clicking the Decision hyperlink from any section of the Referral page.

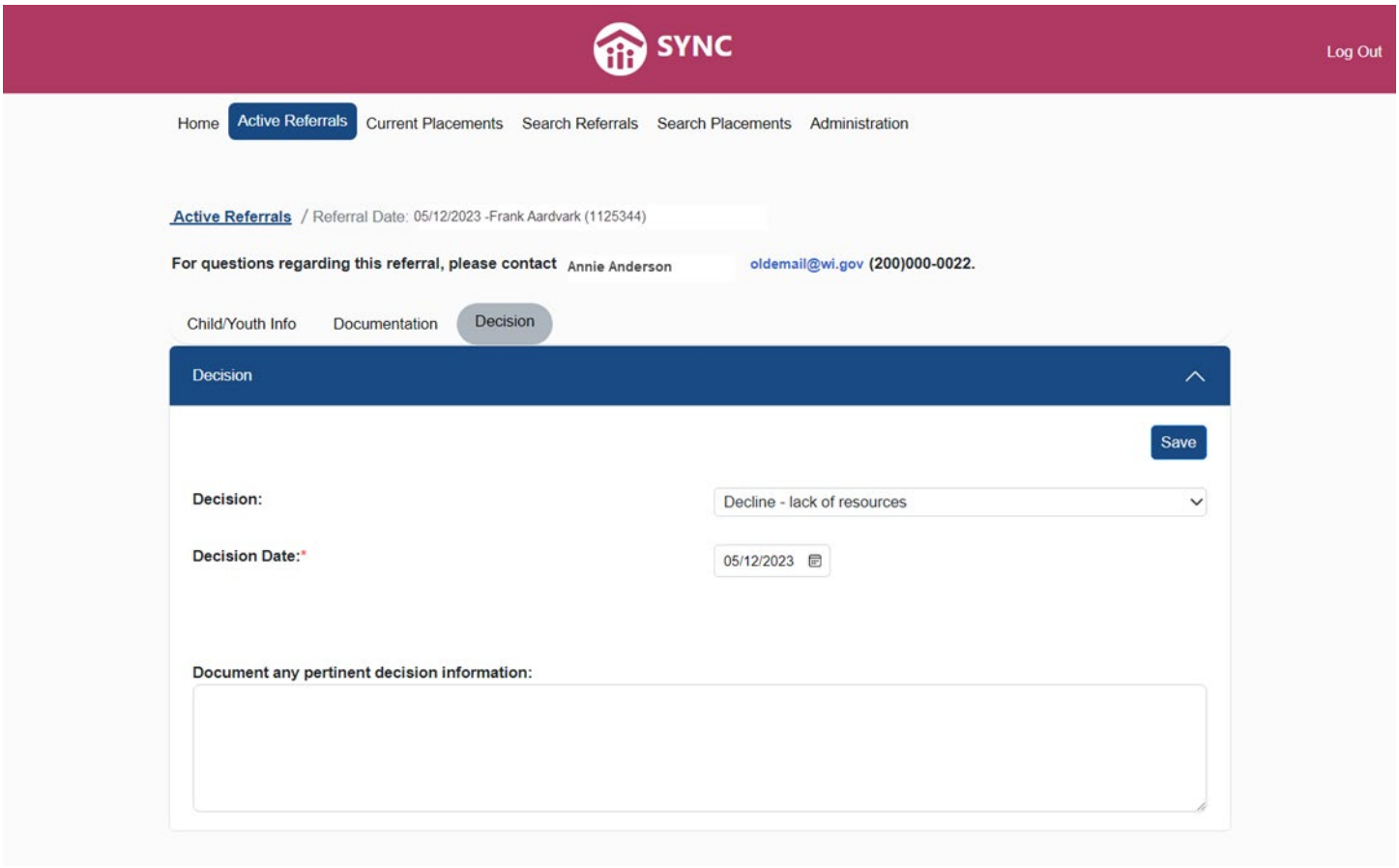
When the decision is Accept, enter the potential admit date (the potential date that placement can begin) and select the appropriate program from the dropdown.



When the decision is to Waitlist the referral, enter the potential admit date. Use the optional narrative box to document any pertinent decision information.



When the decision is Decline, select the appropriate reason for declining. Enter the date the decision was made and use the optional narrative box to document any pertinent information.

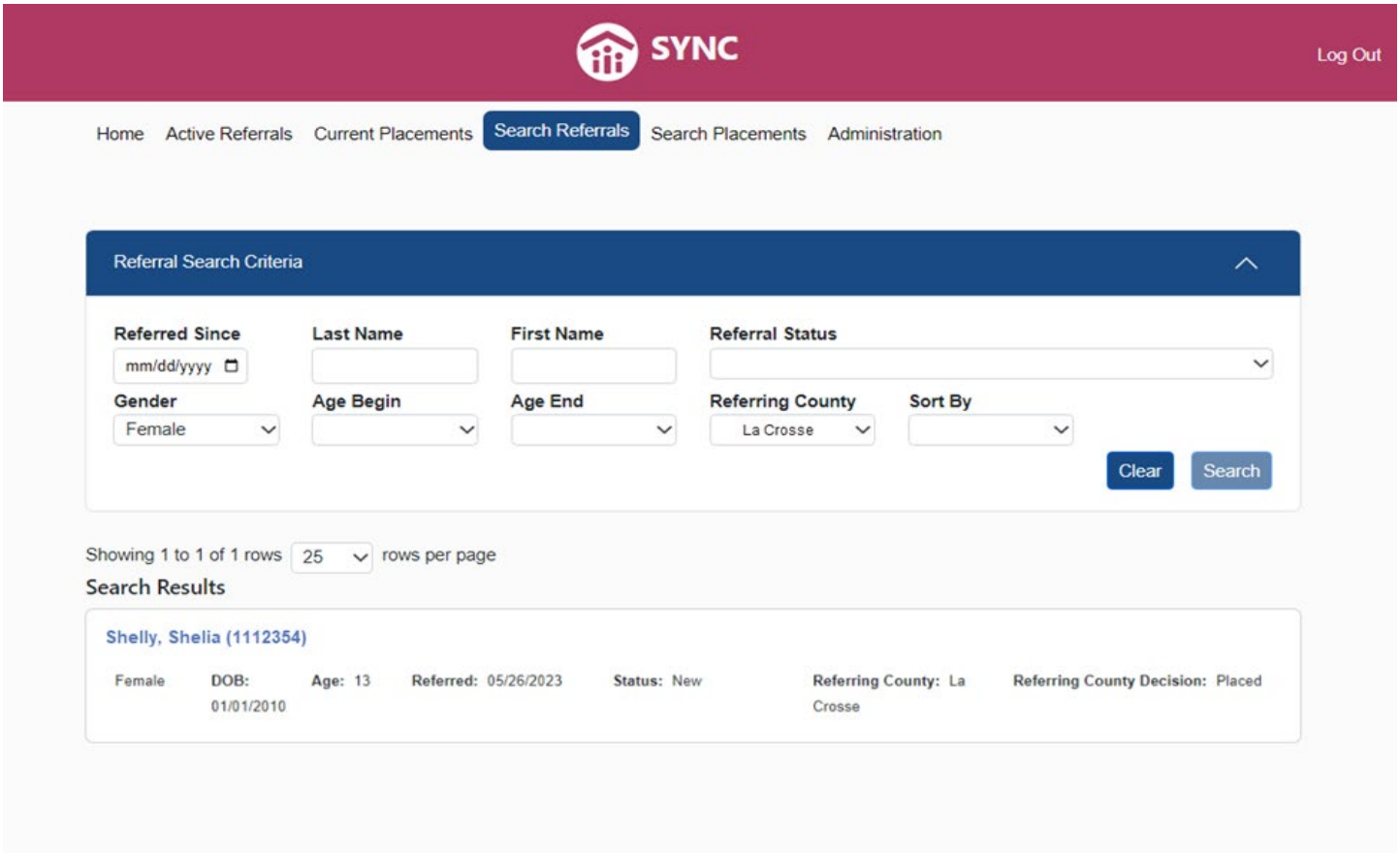


Search Referrals Page

The Search Referrals page allows the user to use search criteria to search for and retrieve referrals that have been shared with and are visible for that facility. Click the Search button to initiate a search of the database based on the information entered in the search criteria. Selecting the Clear button will clear out all the search criteria fields. “Referring Agency’ is the agency of the child welfare professional who is the primary contact for the referral. Initiating a search returns referrals that meet the search criteria and have been shared with the provider who initiated the search. If no results are returned, a message will display.

The name will appear as a hyperlink for referrals returned where the Referring County Decision is either Pending or Placed. The name will appear as static text and not a hyperlink for referrals returned where the ‘Referring County Decision’ is either ‘Not Placed’ or ‘Withdrawn’. Clicking the name hyperlink opens the referral in edit mode when the Referring County Decision for the referral is ‘Pending.’ Clicking the name hyperlink opens the referral in view only mode when the Referring County Decision for the referral is ‘Placed.’

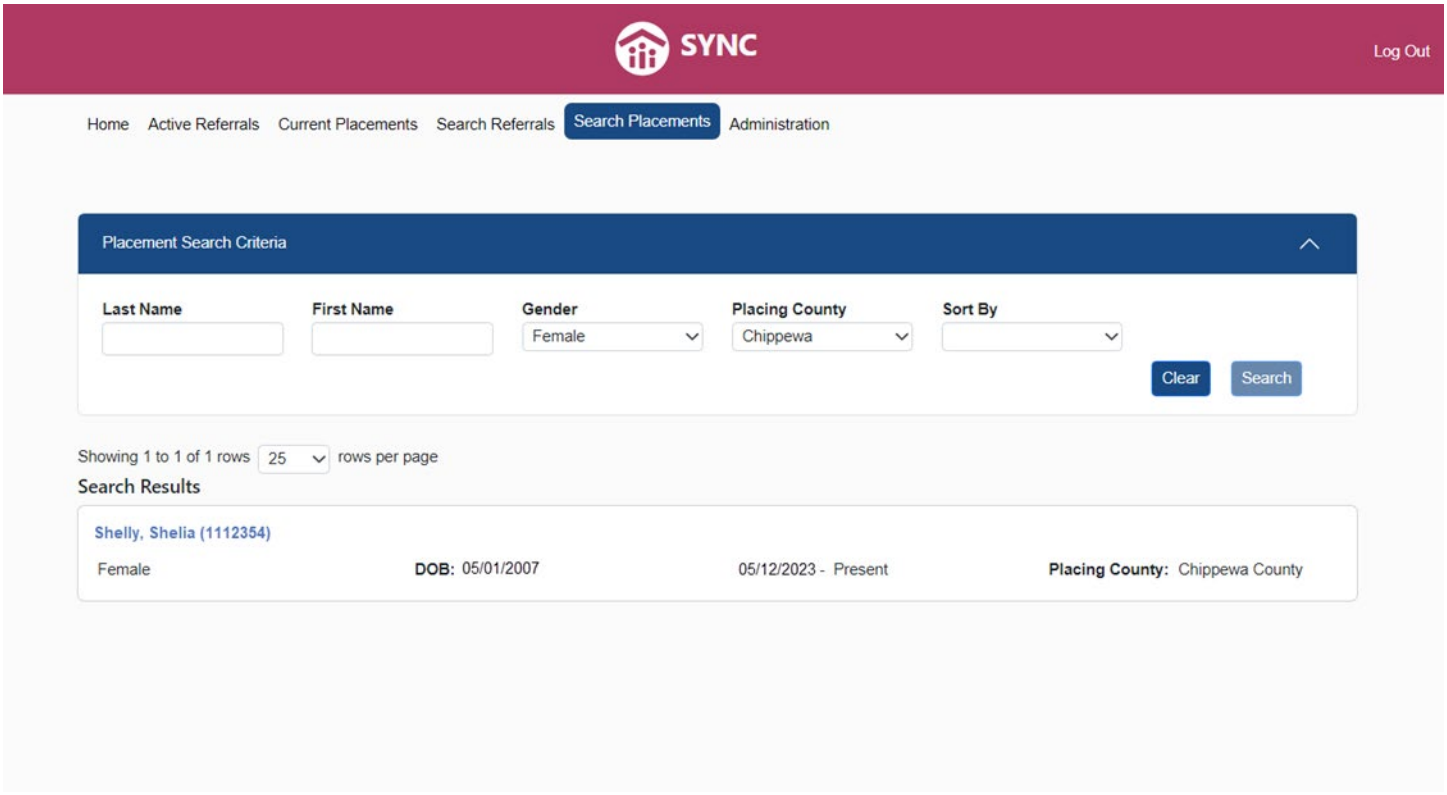
This page is accessed by clicking the Search Referrals button on the menu at the top of the screen.



Search Placements

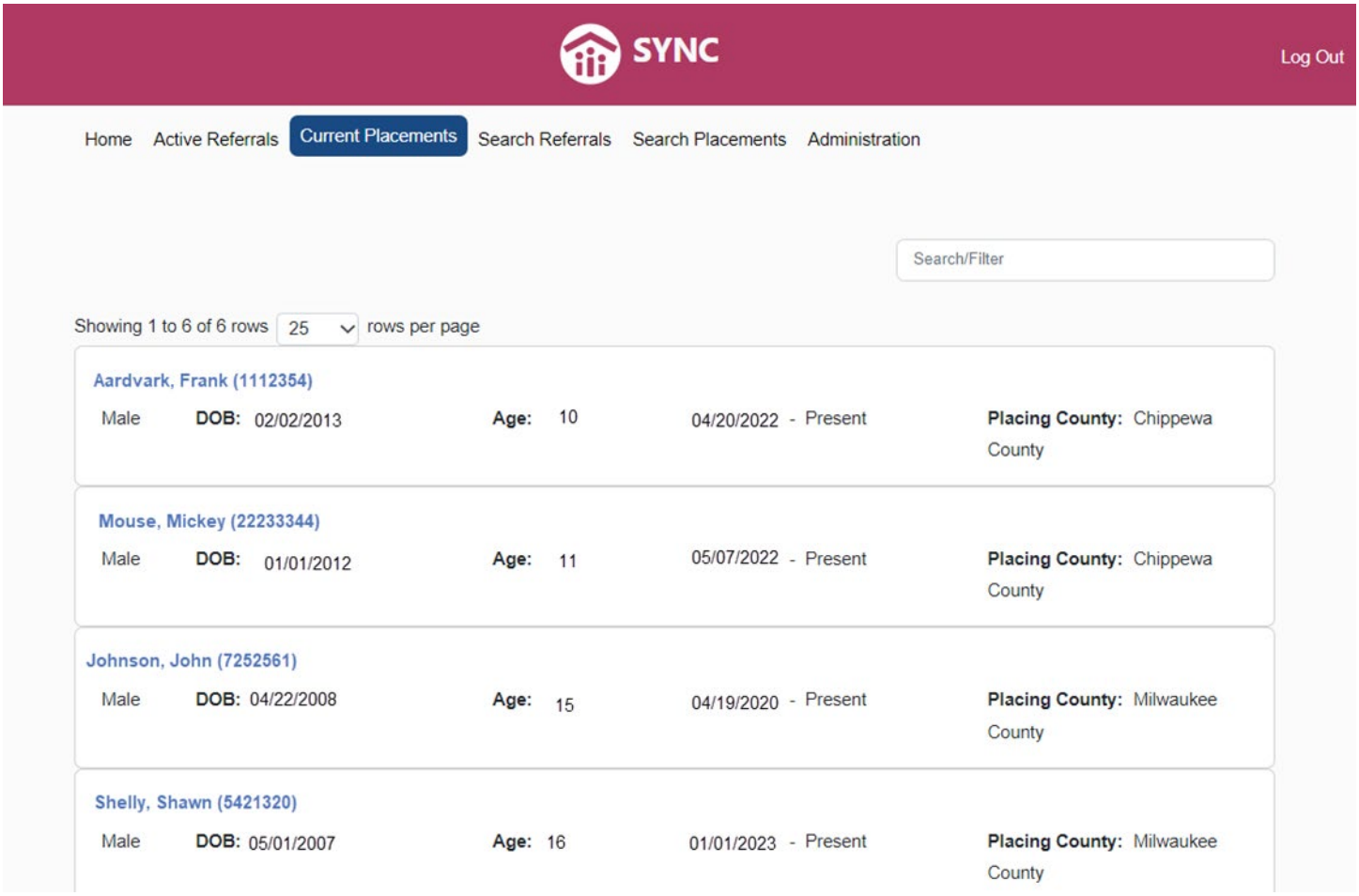
The Search Placements page allows the user to use search criteria to search for and retrieve active as well as historical child/youth placement records in SYNC. Selecting the Clear button will clear out all the search criteria fields. Selecting the Search button initiates a search of the database based on the information entered. This page can be accessed by clicking the Search Placements button on the menu.

Initiating a search returns records for children/youth who meet the search critieria and are currently placed with the provider as well as those who have been historically placed with the provider. Clicking the name hyperlink opens the child/youth's placement record page in edit mode when the corresponding placement in eWiSACWIS does not have a fully approved Placement Ending or has a fully approved placement ending for a reason other than 'Made in Error' and the placement ending approval date is less than 15 days from the system date. The placement record will open in view only mode when the corresponding placement in eWiSACWIS has a fully approved placement ending for a reason other than 'Made in Error' and the placement ending approval date is more than 15 days from the system date; or a more recent fully approved open placement with the same provider is found in eWiSACWIS.



Current Placements

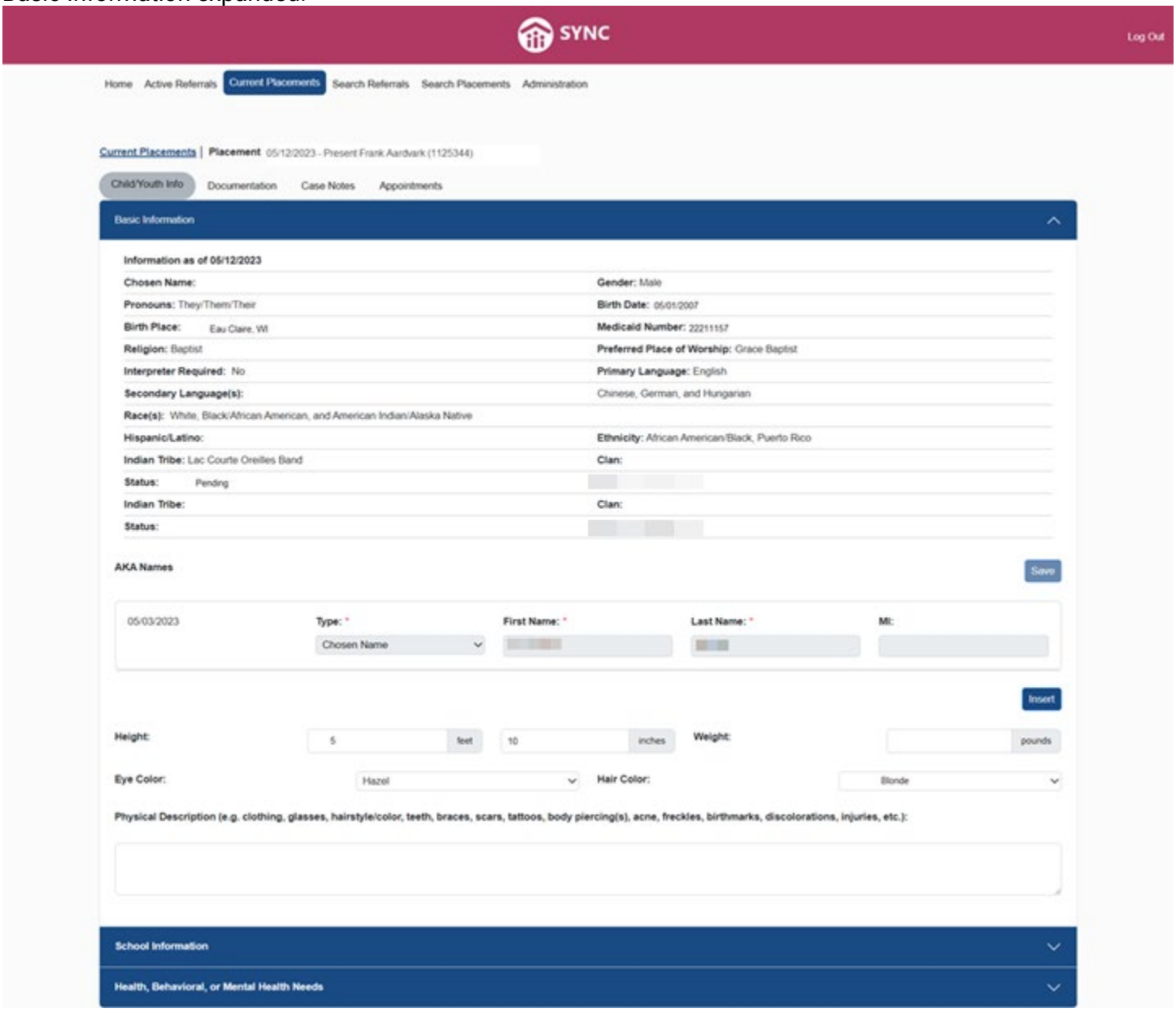
The Current Placements page displays a table view of placements documented in eWiSACWIS that are either currently open with the provider or the placement with the provider ended less than 15 days ago. Edits can be made for current placements with the provider and placements with the provider that ended less than 15 days ago. Use the Search/Filter box to enter any part of the child/youth's name or ID to filter the results displayed on the page. Clicking the child/youth's name will launch the child/youth's placement record in edit mode.



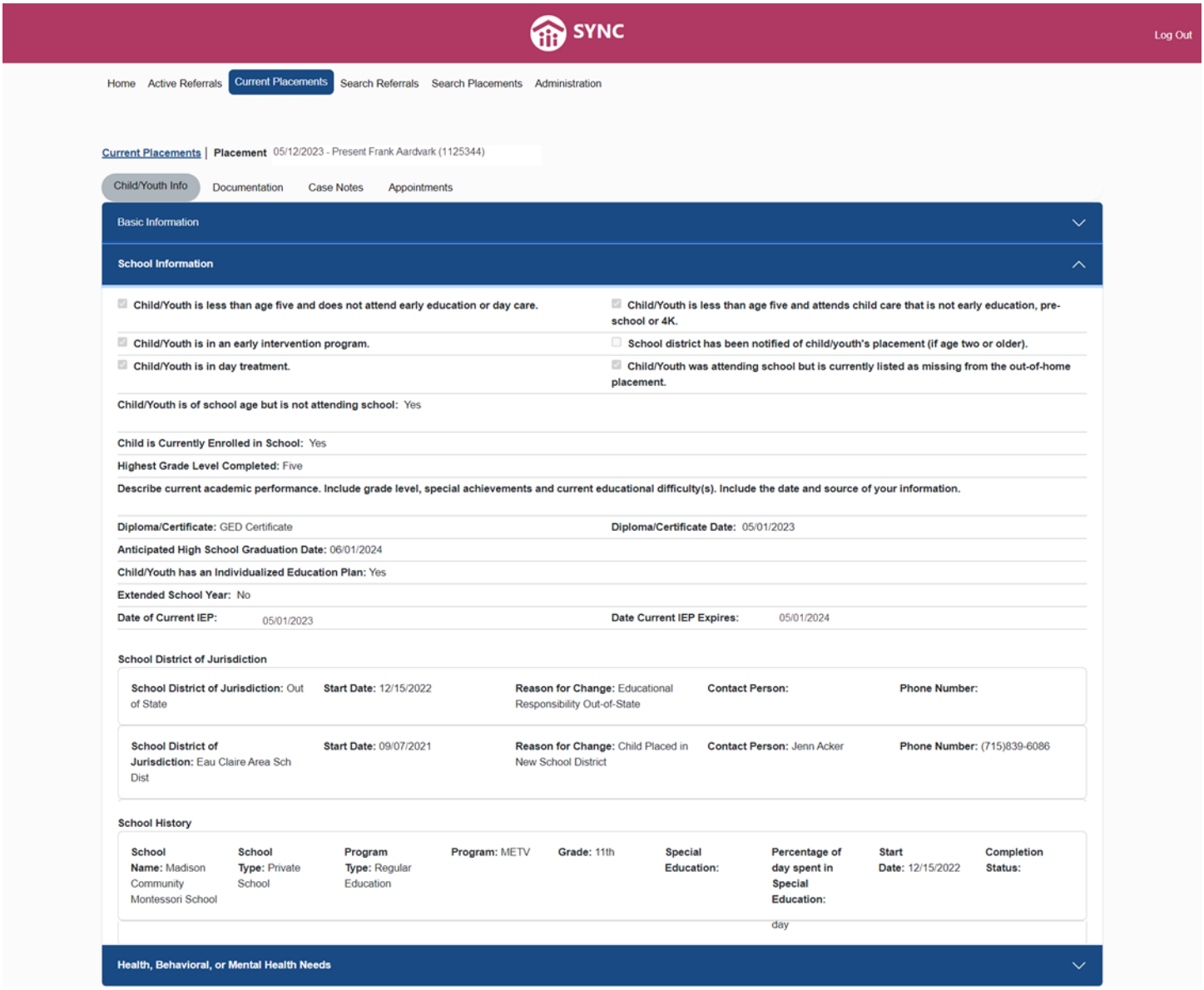
Current Placements – Child/Youth Info

After clicking the child/youth's name, the placement record of that child/youth will display as long as the child/youth is currently placement with the provider or the child/youth's placement with the provider ended less than 15 days ago. The placement record has four sections: Child/Youth Info, Documentation, Case Notes, Appointments. Clicking each of the section names will take you to that section of the placement record. The Child/Youth Info section displays first. This section contains personal and demographic information about the child/youth, medical and mental health information, and school information. Certain parts of this section such as the AKA Names, can be edited by the user which then updates the child/youth's information in eWiSACWIS. Clicking the Save button saves all changes made to the page. Attempting to navigate away from the page with unsaved changes will prompt the user with a message, "Do you want to save your changes?" There will be options for Yes or No.

Basic Information expanded:

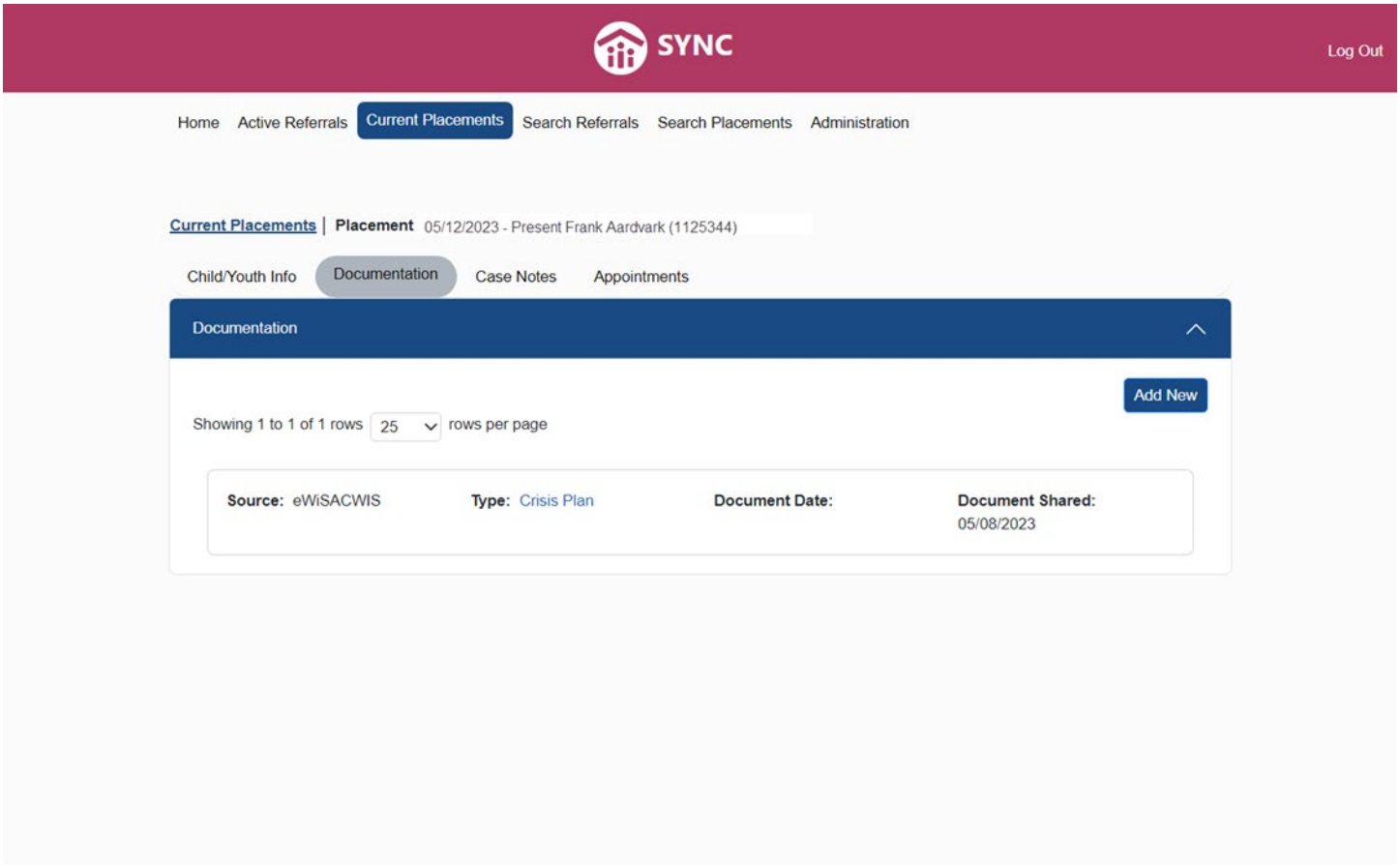


School Information expanded:

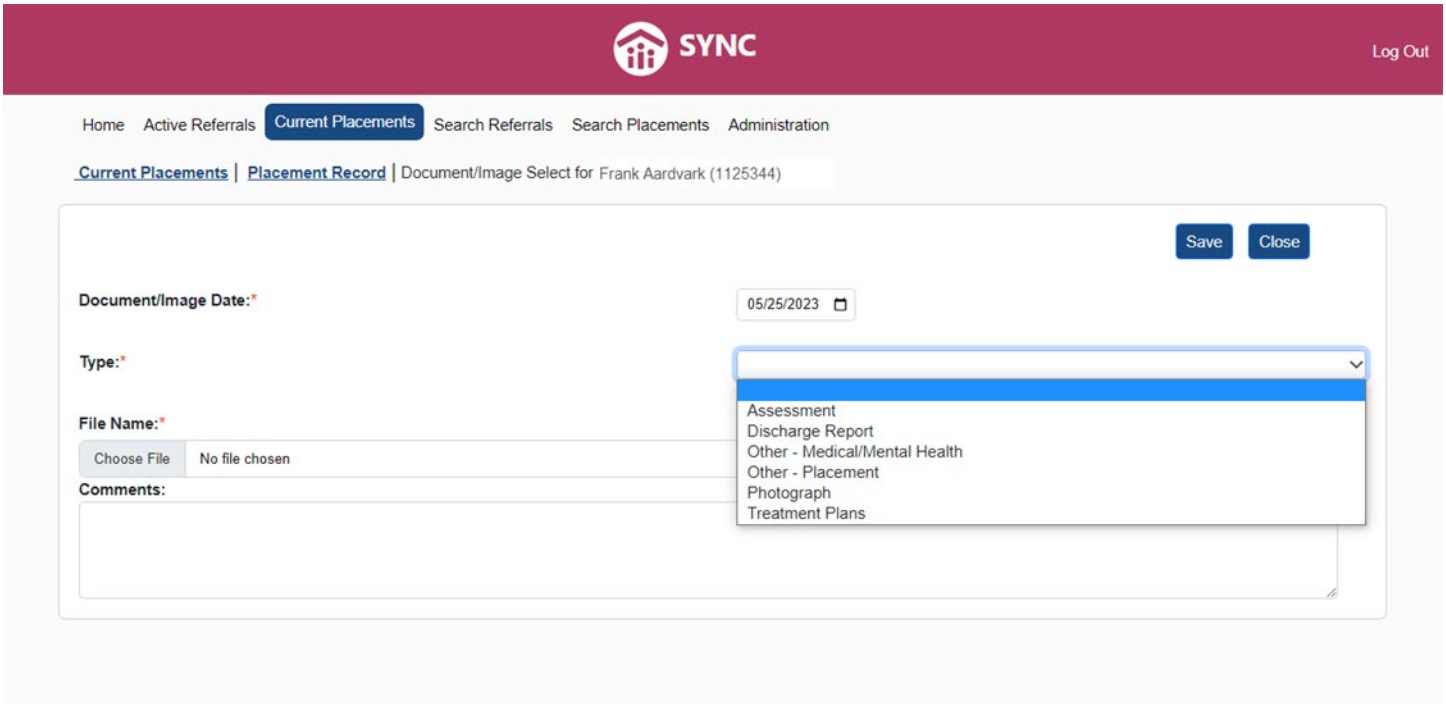


Current Placements – Documentation

The Documentation section is the second section of the child/youth's placement record. This section displays a table view of documents and images that have been uploaded in SYNC or shared from eWiSACWIS. Clicking on the document name will launch the document. Click Add New to upload a new document.



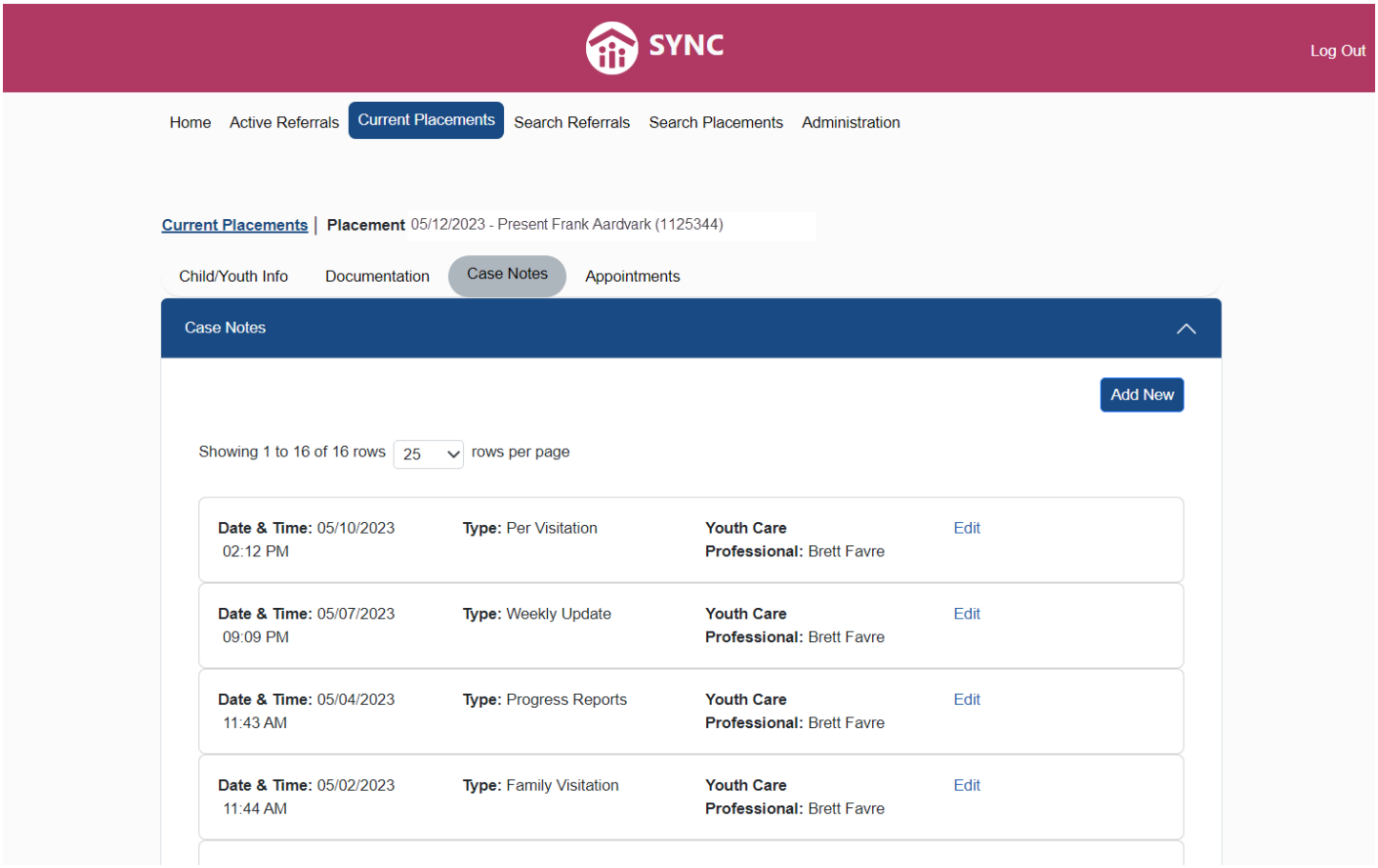
After clicking Add New the user will be brought to the Document/Image Select page to upload the document or image. The document/image date and type fields are required to be completed. The date entered **cannot** be a future date. Select the appropriate type from the dropdown. Click Choose File to locate the document or image. The file becomes a hyperlink to the document/image. There is an optional narrative text box for any comments. Select Save to save the uploaded document or image. Once it is saved successfully, the fields of the page become frozen and cannot be changed. The record is saved in SYNC and immediately becomes an imaging record accessible in eWiSACWIS.



Current Placements – Case Notes

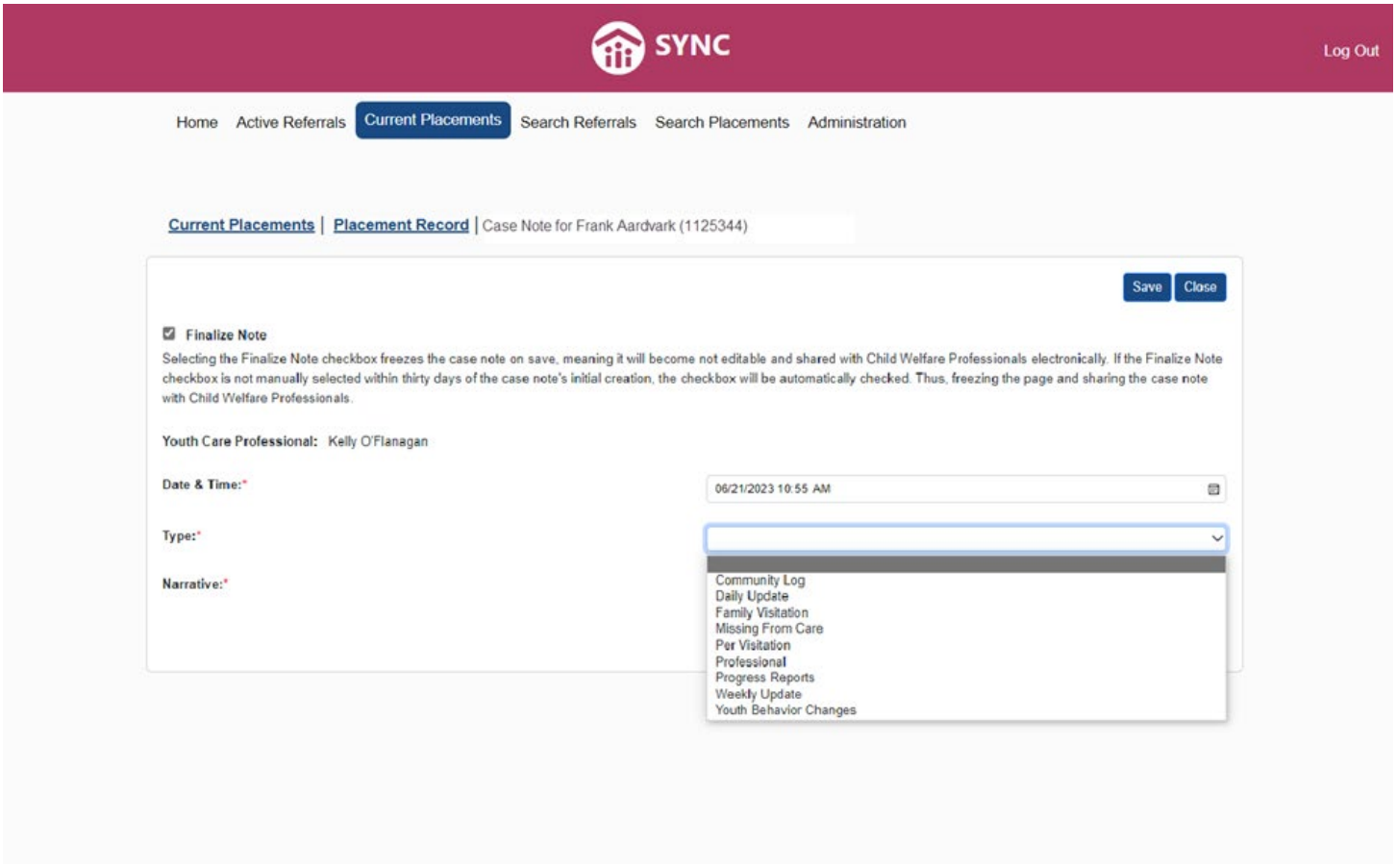
The next section of the child/youth's placement record is Case Notes. This section displays the summary of case notes that have been documented for the child/youth by staff at the provider agency. The system pulls in all case notes for both the child/youth and provider that have been created for all the child/youth's placements with the provider across different cases and counties. The case notes for the open placement will always display. Case notes from closed placements will be displayed only if the closed placement is still within the timeframe in the retention policy (15 days).

The Case Notes section is presented in a table displaying the date/time, type, and youth care professional. Provider staff can create a new note by selecting the Add New button. Selecting the hyperlink for the case note row launches the Case Note page. If the case note has not been finalized, an edit hyperlink will display in an unlabeled column. Selecting the edit hyperlink will launch the Case Note page as an editable page. If the case not has been finalized, a view hyperlink will display in the unlabeled column. Selecting the view hyperlink will launch the Case Note page as disabled.



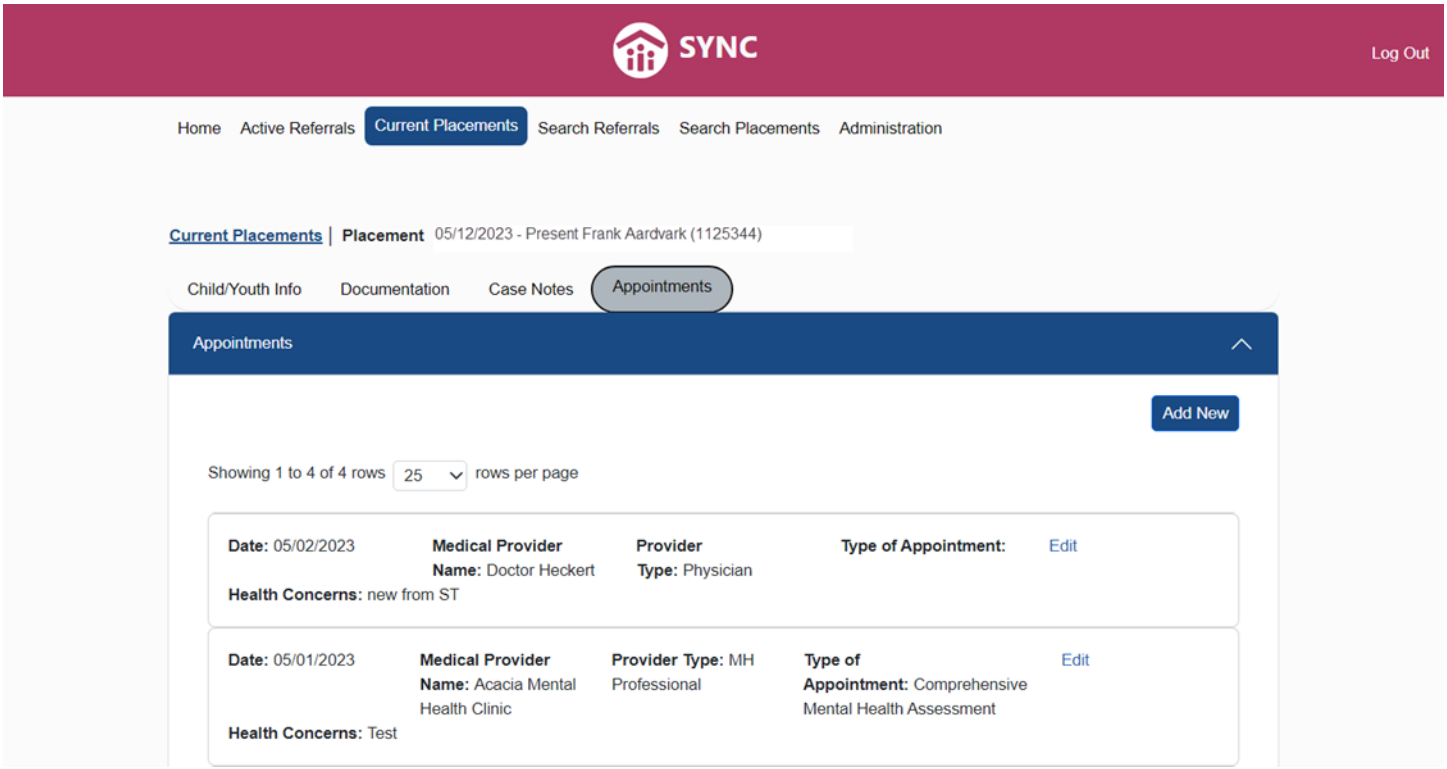
After selecting Add New, the Case Note page will launch. This page is used to create a new case note or review the detail of an existing case note. Enter the date and time of the note then select the type from the drop-down list. The date entered cannot be a future date. Use the narrative box to describe what took place.

Click Save to save the note. Checking the Finalize Note checkbox, then selecting Save will freeze the note and no further edits can be made. The note will automatically finalize if left unchecked past 30 days form the creation date of the note.



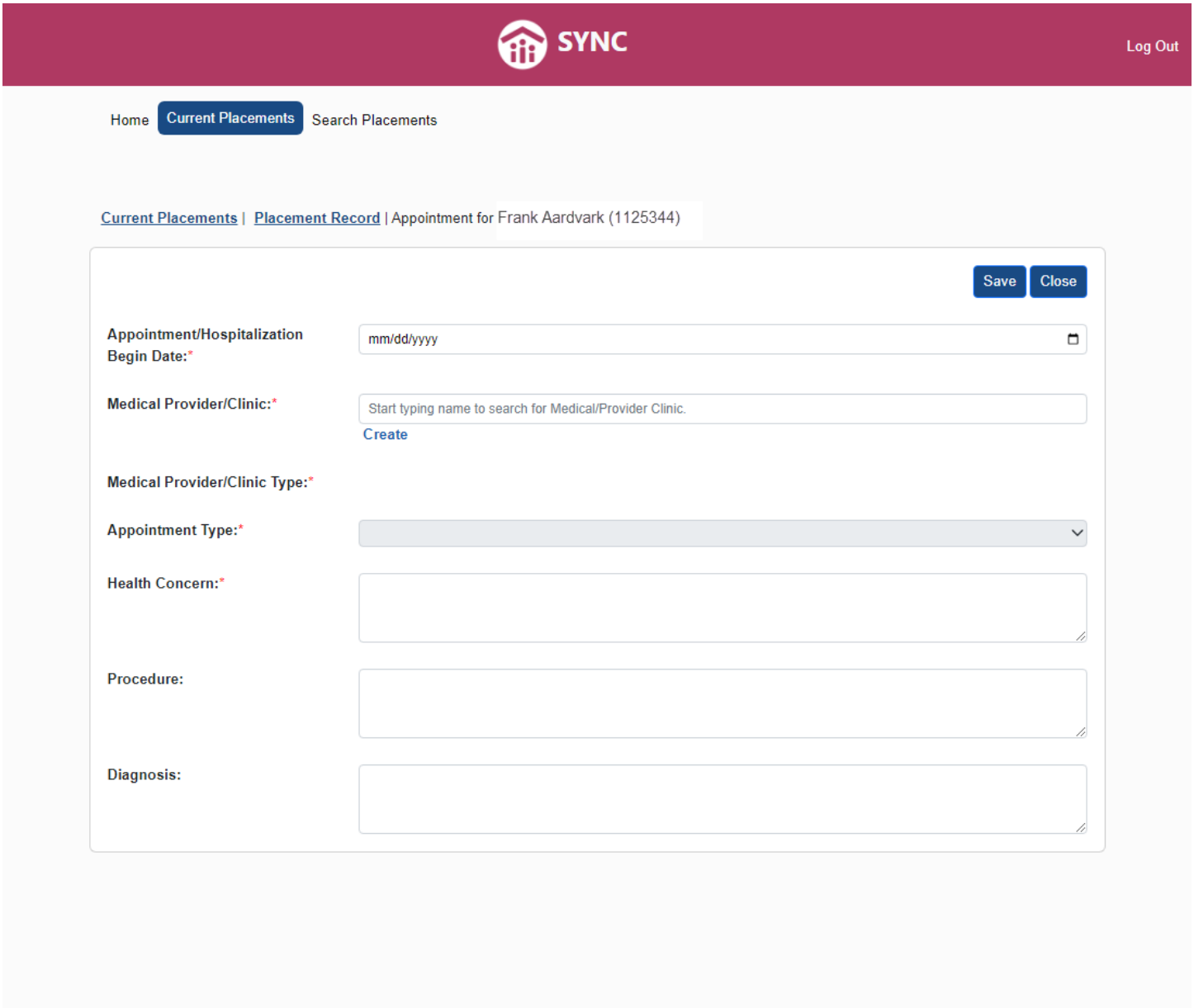
Current Placements – Appointments

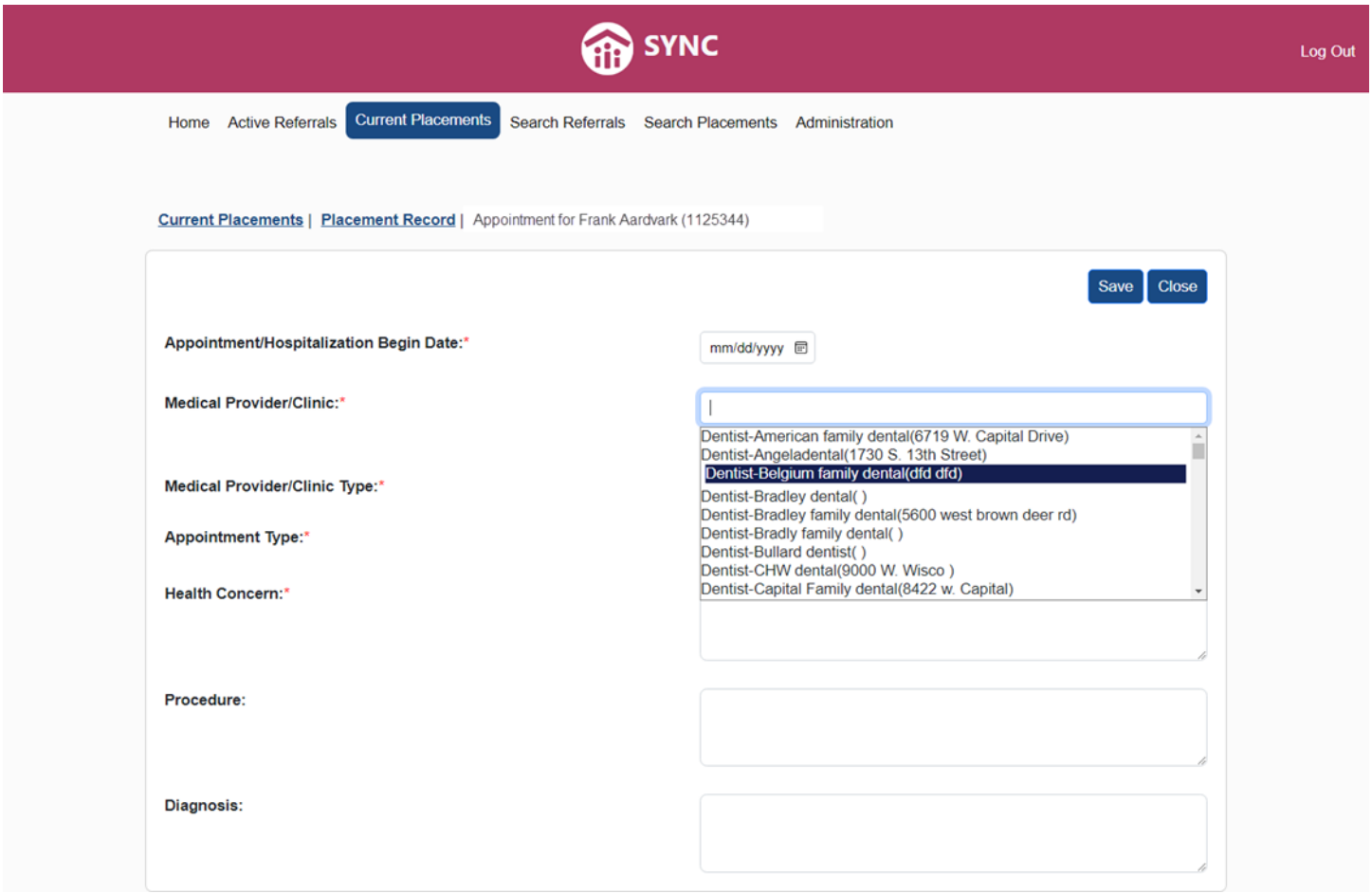
The final section of the child/youth's placement record is Appointments. This section displays a summary of the child/youth's appointments during the placement period. The information is presented in a table format. The columns in the table are: Begin Date, Medical Provider Name, Provider Type, Type of Appointment, Health Concern and an unlabeled column with edit or view hyperlinks. The user can create a new appointment by selecting Add New.



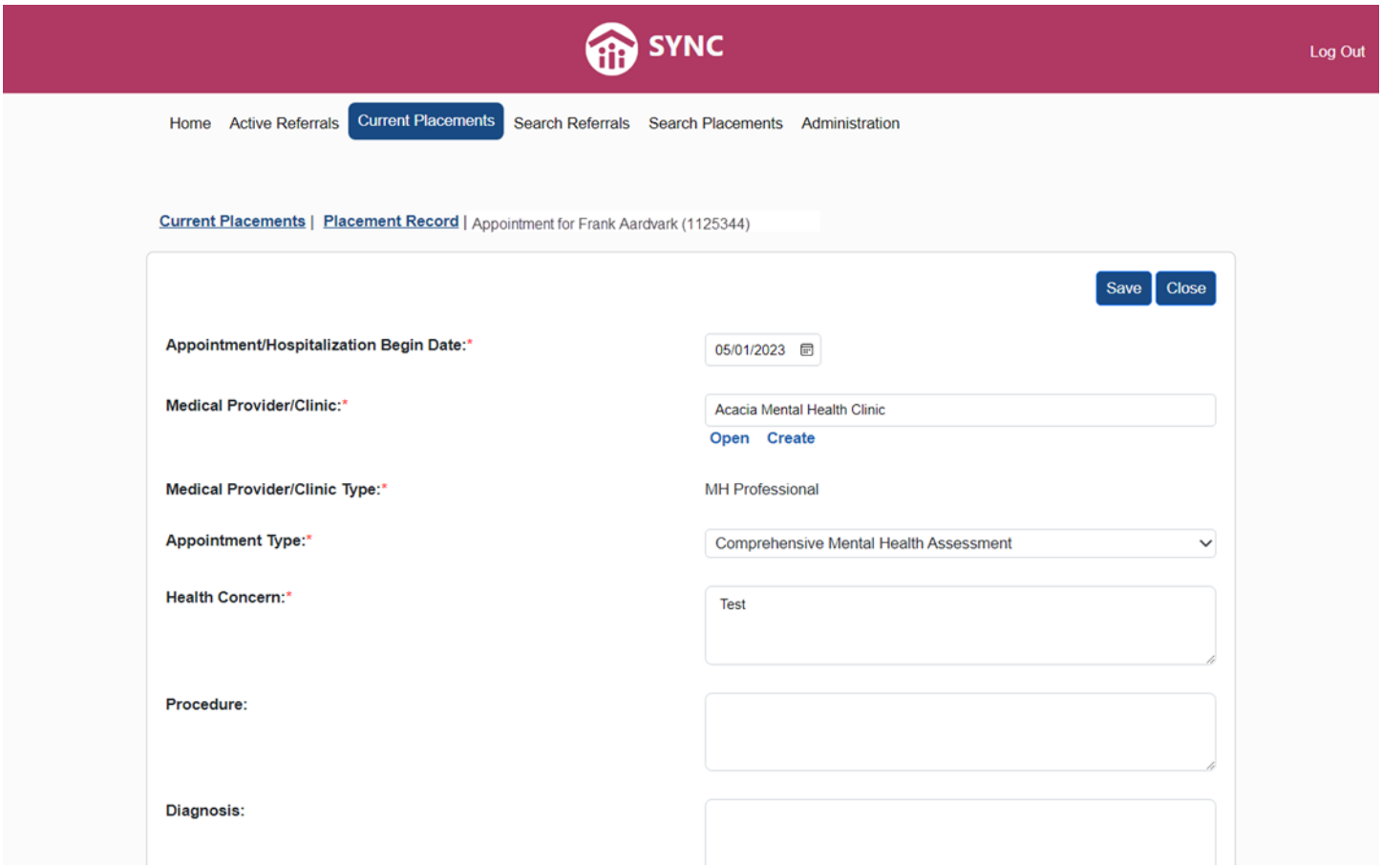
Add New Appointment

After selecting Add New, the Appointments page will launch. Use this page to create a new appointment or review the detail on an existing appointment. Enter the date of the appointment. When a user starts entering a name in the Medical Provider/Clinic field, options will display if that provider has been previously entered into the system. If no provider is found, click Create to launch the Medical Provider Page and create a new medical provider record. After selecting/creating the appropriate medical provider, the Medical Provider/Clinic Type field will display. Use the drop down to select the appointment type. Enter the health concern in the required blue field. There are optional narrative text boxes to enter information about the procedure and diagnosis from the appointment. Select save after entering all required information.



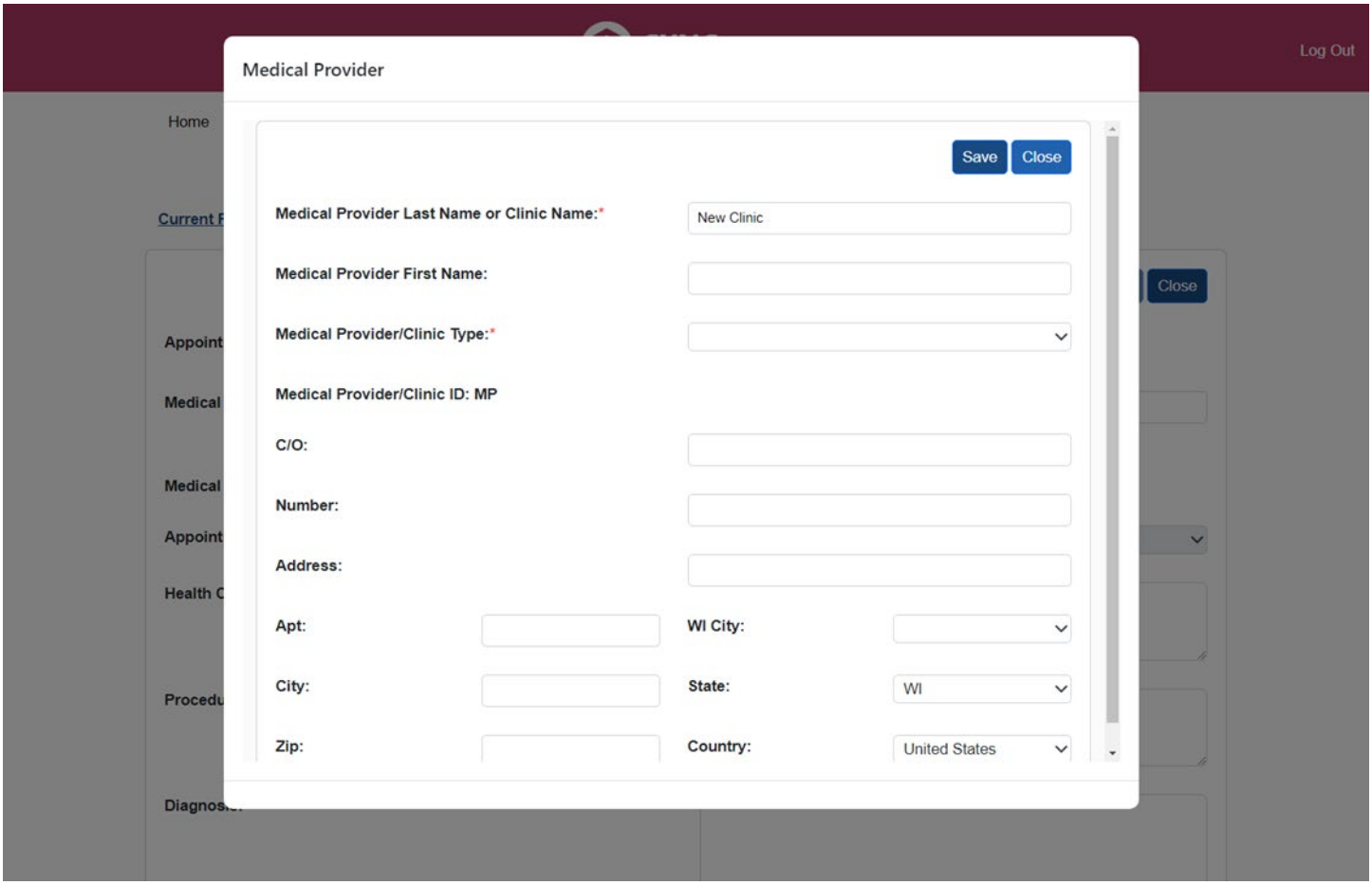

SYNC
Log Out
Home
Active Referrals
Current Placements
Search Referrals
Search Placements
Administration
Current Placements | Placement Record | Appointment for Frank Aardvark (1125344)
Save
Close
Appointment/Hospitalization Begin Date:*
mm/dd/yyyy
Medical Provider/Clinic:*
Dentist-American family dental(6719 W. Capital Drive)
Dentist-Angeladental(1730 S. 13th Street)
Dentist-Belgium family dental(dfd dfd)
Dentist-Bradley dental( )
Dentist-Bradley family dental(5600 west brown deer rd)
Dentist-Bradly family dental( )
Dentist-Bullard dentist( )
Dentist-CHW dental(9000 W. Wisco)
Dentist-Capital Family dental(8422 w. Capital)
Medical Provider/Clinic Type:*
Appointment Type:*
Health Concern:*
Procedure:
Diagnosis:

If the provider already exists in the system, an Open link will display. Click Open to view and/or the medical provider record.



Medical Provider Record

The Medical Provider/Clinic pop up page is used to record provider information. The Medical Provider Last Name or Clinic Name and Medical Provider/Clinic Type are all required fields. The remaining fields are all optional but should be completed if the user has the information. Select Save to save the information. Select close to close the page.

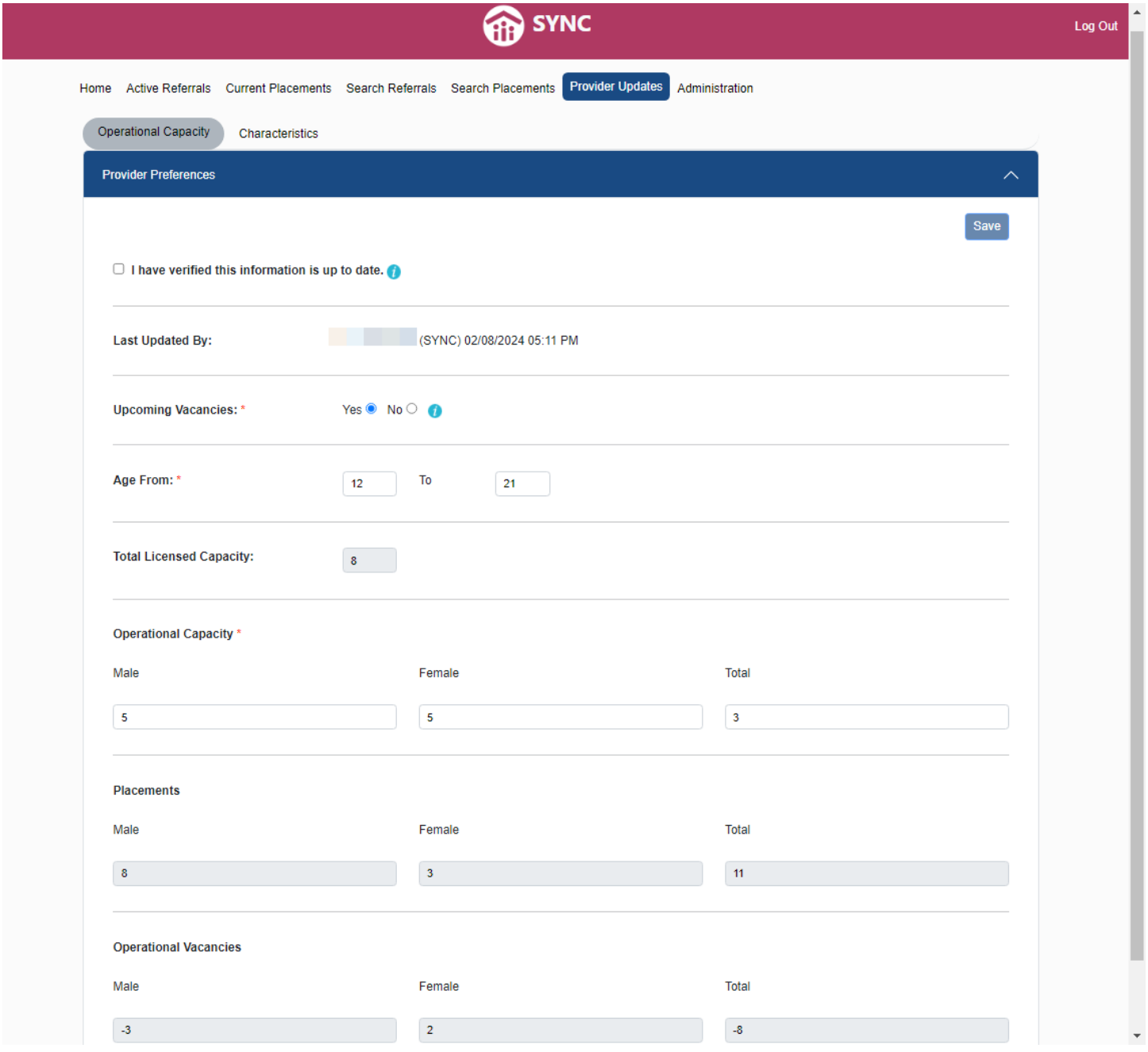


Provider Updates

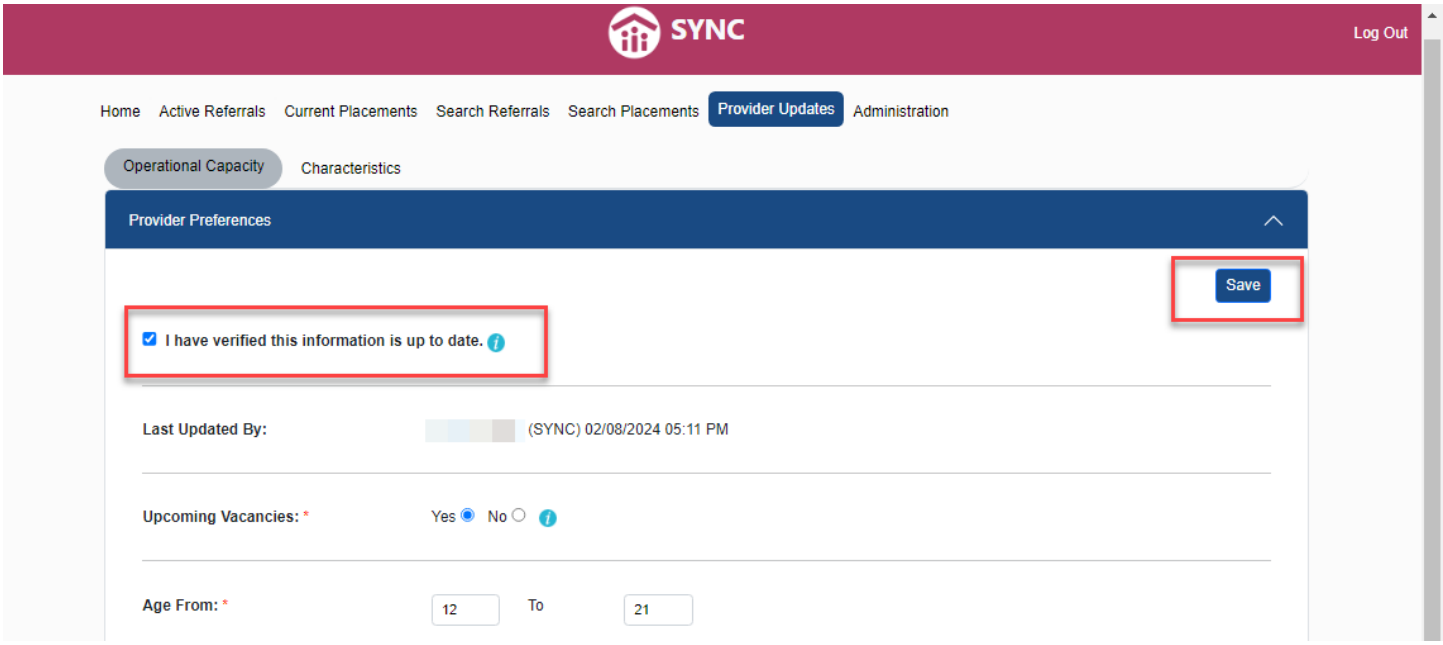
The Provider Updates page gives providers the ability to document operational level information about the children and youth that they serve. The Operational Capacity tab provides the ability to indicate if a provider has upcoming vacancies, the ability to update the ages of the children/youth served (within what the provider is licensed for), and the maximum operational capacity of males and females for the home at any given time. The Characteristics tab allows the provider to update or maintain provider characteristics for the children and youth they serve.

Operational Capacity

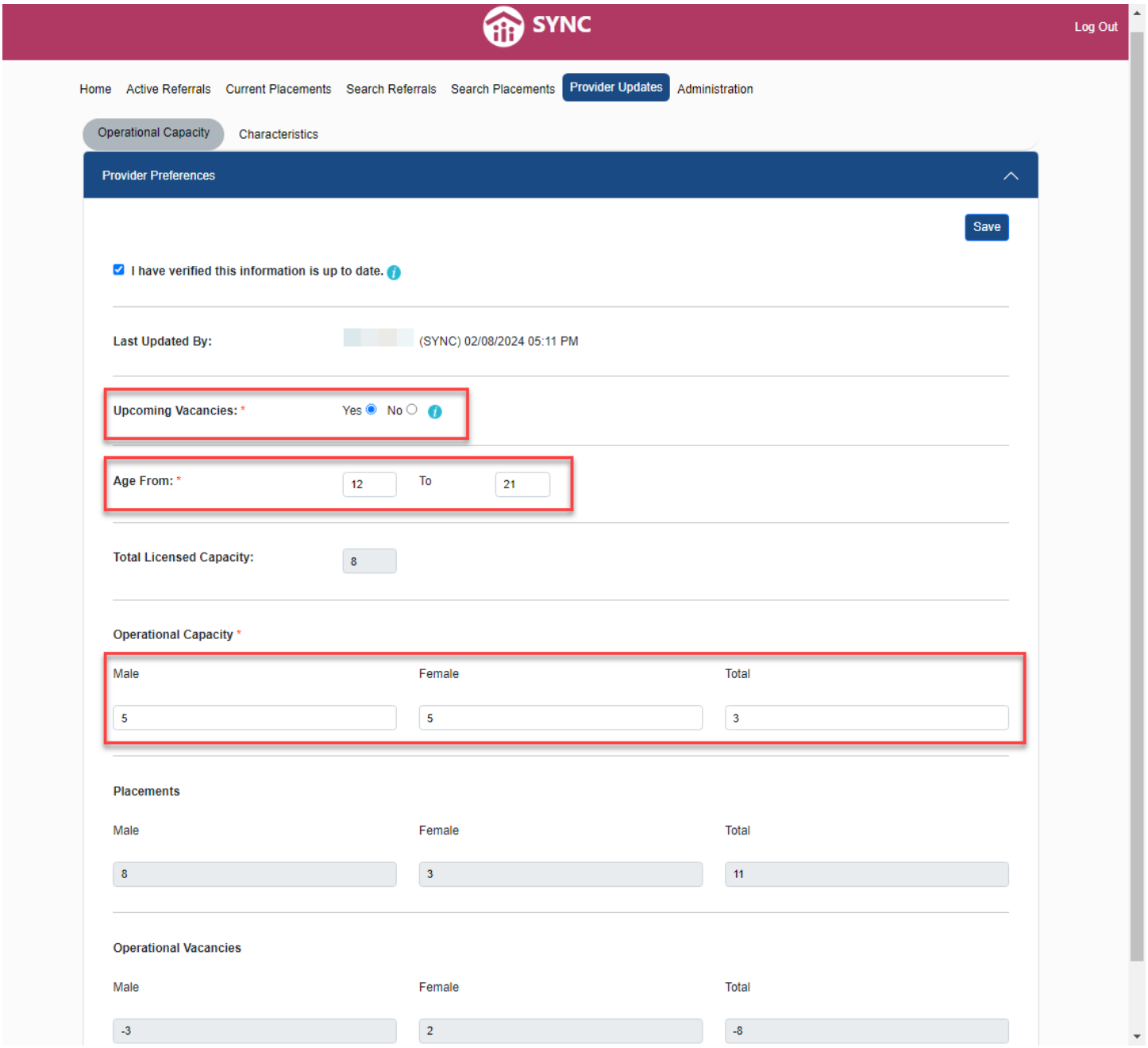
Selecting the Provider Updates section will default to the Operational Capacity tab. Here is where information can be updated which will help inform Child Welfare Professionals of availability and capacity at Congregate Care Provider locations when making Congregate Care Referrals to SYNC providers.



Providers should be regularly updating this information. Reminder emails will be sent every 30 days to any user assigned to the Referral/Intake Coordinator role if an update to the Operational Capacity tab has not occurred. If no changes have occurred since the last update, select the verification box to then save the page, indicating the information was reviewed and is up to date.

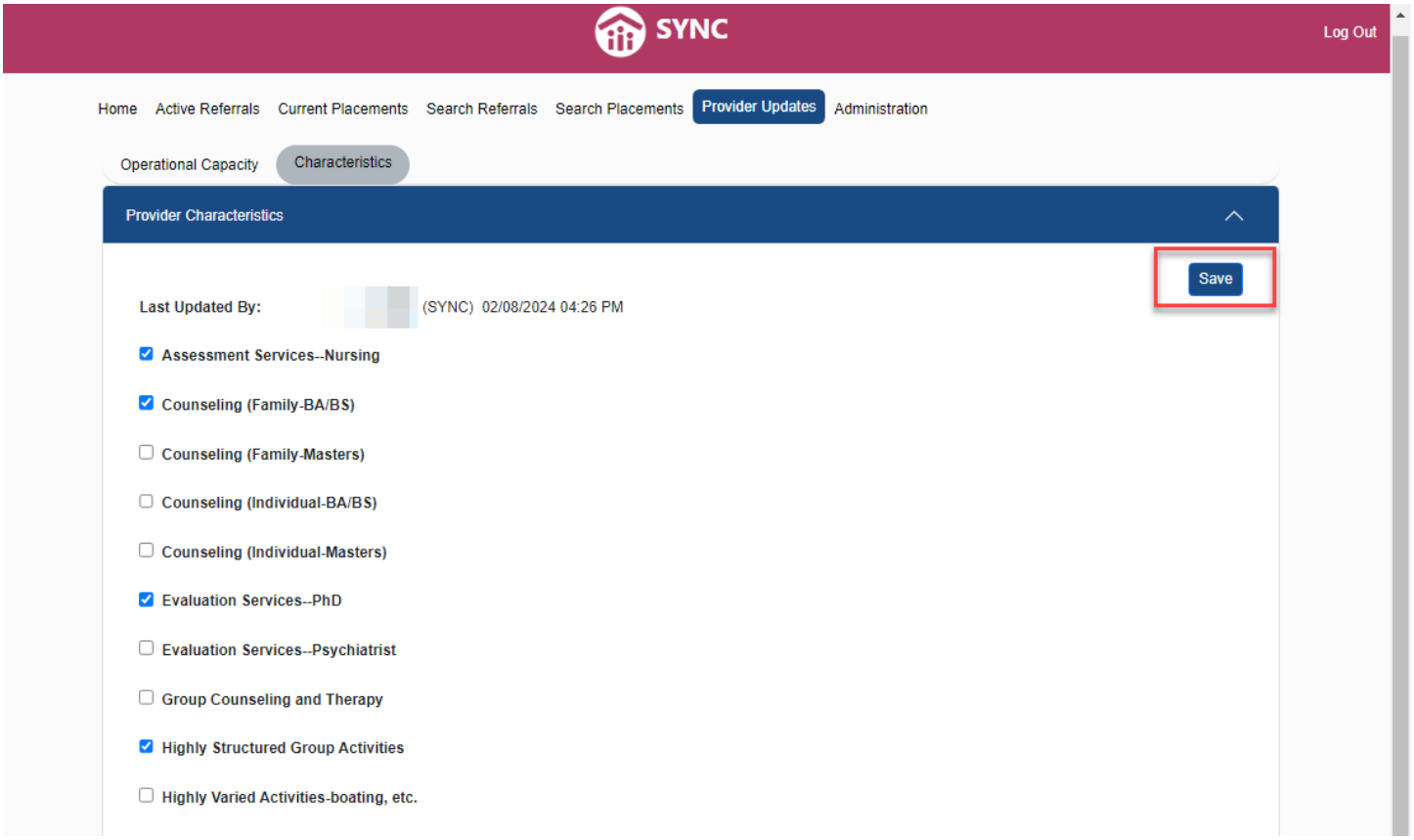


The Provider Updates page; Operational Capacity tab, gives providers the ability to document operational level information about the children/youth that they serve. Providers can indicate if they have upcoming vacancies by selecting the Yes button. Selecting No will limit the amount of referrals a provider will receive. A provider can also update the Age From and Age To fields to more accurately reflect the current demographic of their placements to better match possible referrals, within what the provider is licensed for. Lastly, a provider can update the Operational Capacity for males, females, and total, which reflects the number of children or youth the provider can actively provide care for at that given time. The number for each section, Operational Capacity for Males, Operational Capacity for Females, and Total Operational Capacity, cannot exceed the Total Licensed Capacity in each field. The number in each field can be lower than the Total Licensed Capacity, dependent on what the provider is able to operationally accept.



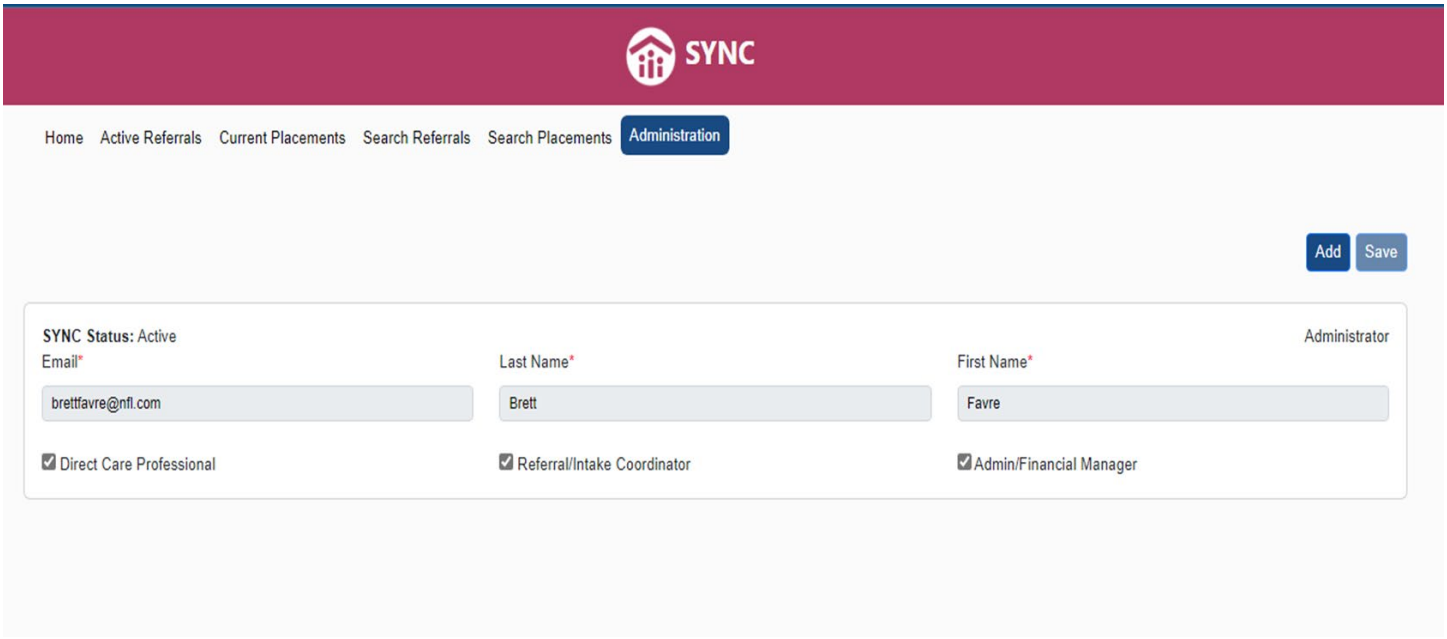
Characteristics

The Provider Updates page: Characteristics tab, gives providers the ability to update or maintain provider characteristics. Selecting or de-selecting a checkbox enables the save button to allow the provider to make changes.



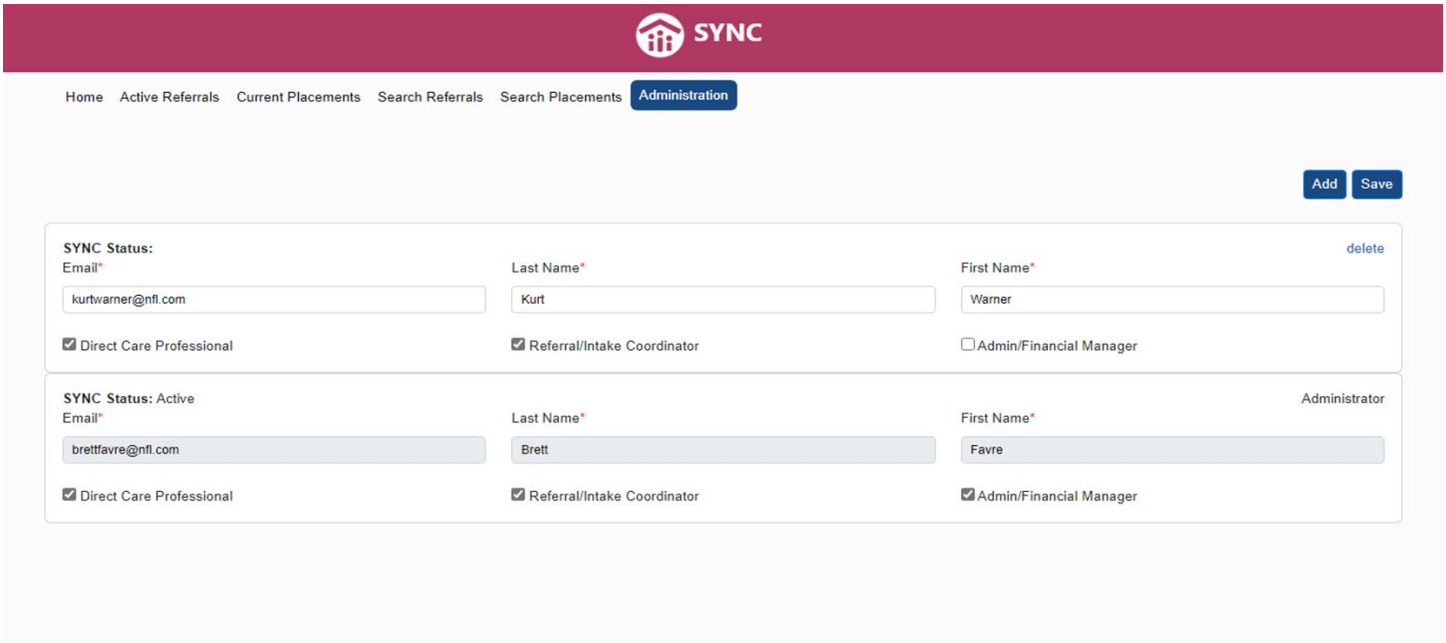
Adding Users into SYNC

The SYNC Administrator will have access to the Administration tab at the top of the screen. On this page, the name, email, SYNC status and the user's role will display for each user within the agency that has access to SYNC. The SYNC Administrator's information will automatically display and will show that they are "Active". This happens through the licensing specialist assigned to the provider agency.

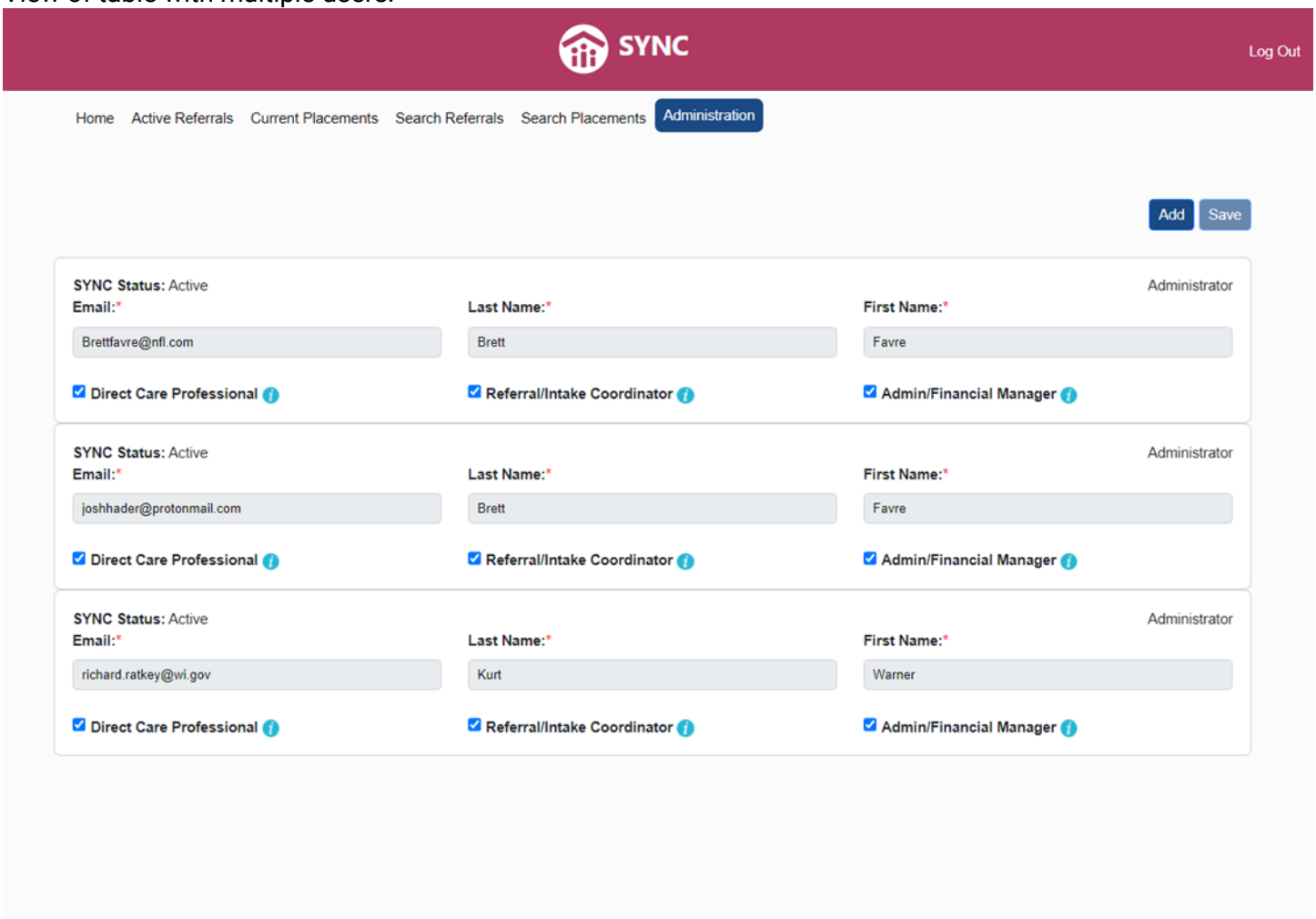


To add a user to SYNC, each user will need to create a MyWisconsin ID account. After the MyWisconsin ID account is created, the SYNC Administrator will click Add to enter each user. Enter the name and email address of the user and select the role. Click Save. If the user has successfully set up their MyWisconsin ID account, their status will say "Active". If a user is not "Active", the status will say "Pending Activate". You may inactivate a SYNC User while the status is listed as "Pending Activate."

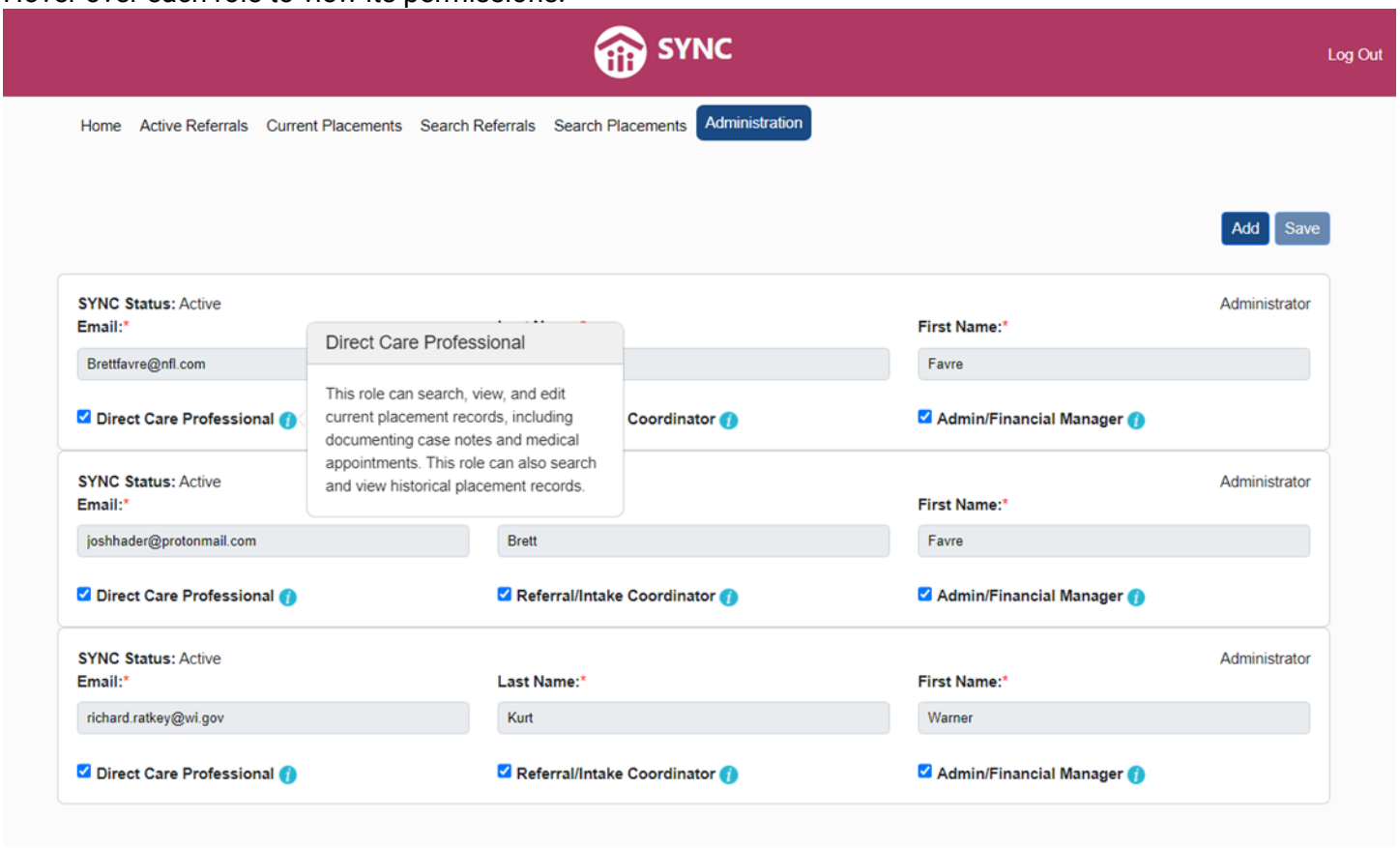
Click delete to remove an active user from SYNC. A user should be deleted if they are no longer employed by the provider agency and/or if they no longer require access to SYNC.

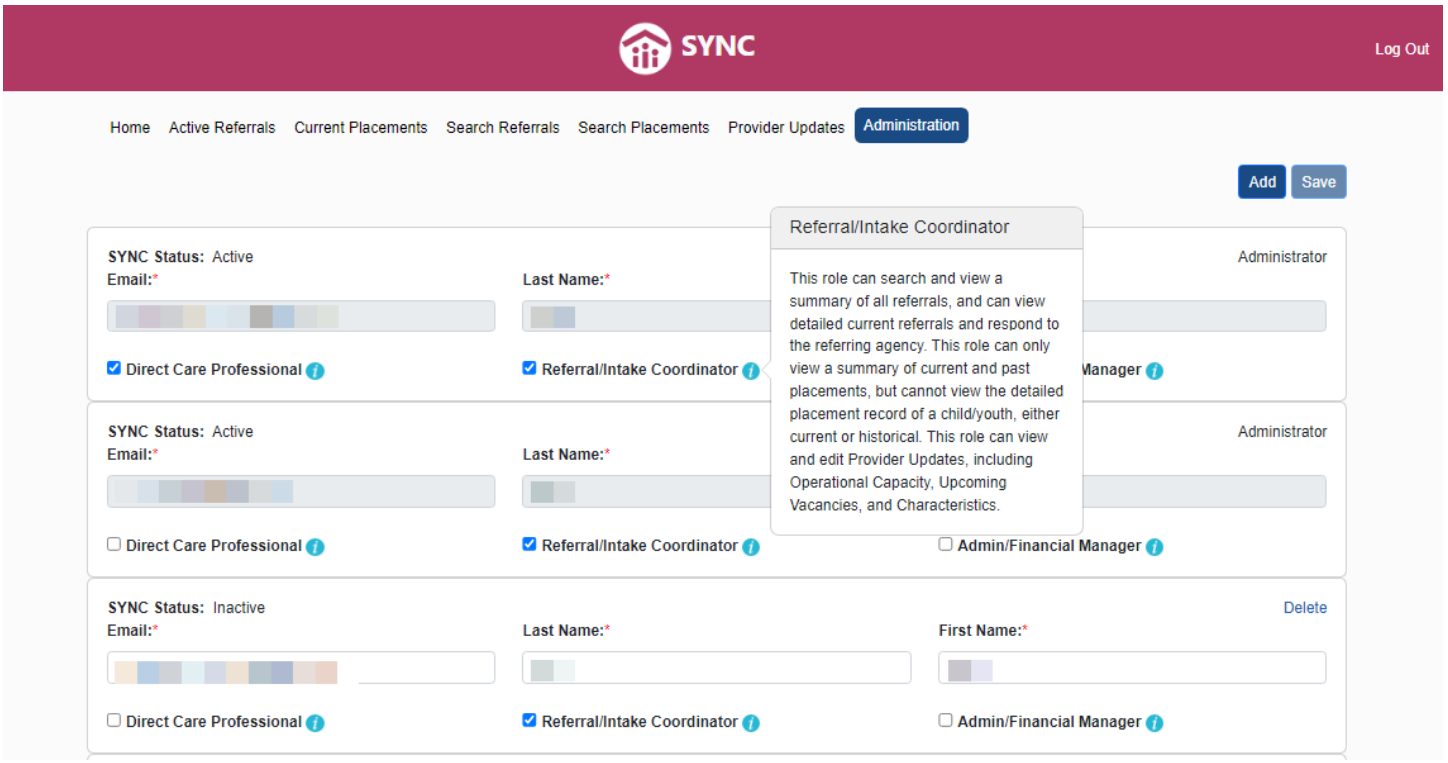


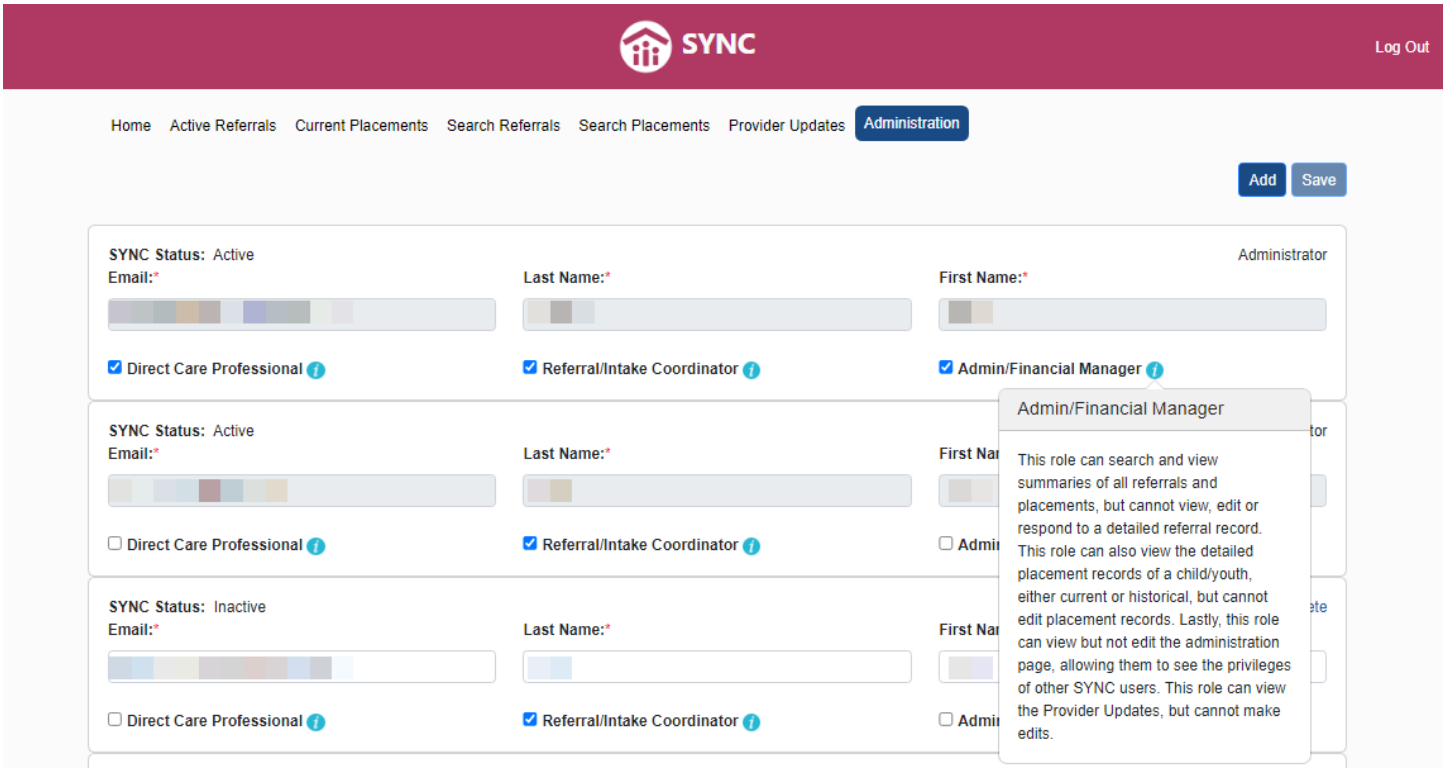
View of table with multiple users:



Hover over each role to view its permissions.






SYNC
Log Out
Home
Active Referrals
Current Placements
Search Referrals
Search Placements
Provider Updates
Administration
Add
Save
SYNC Status: Active
Email:*
Last Name:*
First Name:*
Administrator
Direct Care Professional
Referral/Intake Coordinator
Admin/Financial Manager
SYNC Status: Active
Email:*
Last Name:*
Direct Care Professional
Referral/Intake Coordinator
SYNC Status: Inactive
Email:*
Last Name:*
Direct Care Professional
Referral/Intake Coordinator
Admin/Financial Manager
This role can search and view summaries of all referrals and placements, but cannot view, edit or respond to a detailed referral record. This role can also view the detailed placement records of a child/youth, either current or historical, but cannot edit placement records. Lastly, this role can view but not edit the administration page, allowing them to see the privileges of other SYNC users. This role can view the Provider Updates, but cannot make edits.