



# Wisconsin Child Care Regulatory System (WISCCRS)

User Guide

Dashboard

June 2025

Division of Early Care and Education

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## Background

The purpose of this module is to manage tasks and messages in WISCCRS. Tasks and messages can come from any Child Care system (CSAW, YoungStar, Child Care Provider Portal (CCPP), and other users in WISCCRS). The dashboard enables communication from another system that help workers be informed, track tasks that need to be completed, manage workload, and quickly access various screens in WISCCRS where work tasks need to be completed.

The WISCCRS Dashboard distributes tasks and messages to users' inboxes. The tasks can be assigned or reassigned to other users (CBU staff, Office Manager and Pre-licensing Lead can assign tasks). This module allows updating the status, priority, and comments related to a task. The description of the task links the user to the page in WISCCRS where the user can complete the task. Depending on the task, this work may change the status of the task to Processed.

For example, a supervisor/lead worker receives a new task in their inbox. The supervisor/lead worker can assign that task to another worker. When assigned, the assigned worker will see this task under My Assignments. The worker can update the status of the task to In Progress once they have begun their work. When work is completed, the task status should be changed to Processed. In some cases, the task status is automatically changed to Processed once action is taken.

Below is an explanation of tasks and messages:

- **Tasks:** An action is needed; staff process tasks by doing something in the system (e.g., requesting a background check, FBI/DOJ results for an individual have been received, etc.). The task contains a link to the page in WISCCRS where the issue that generated the task can be accomplished. Tasks can be assigned to workers and have varying levels of progress: Pending, Assigned, In Progress, Processed, or Canceled.
- **Messages (Certification/Licensing Regional Staff):** Sent to inform an agency or worker. No action is needed to process the message. Messages can be read, but cannot be assigned because they are informational only. Once the message has been read and is no longer needed the status may be changed to Processed.

## Security

Users needing access to the Dashboard are assigned a role by the Administrator (DCF Central Office Staff or regional Office Managers). This staff assigns Dashboard roles for BECR Regional Licensing Staff, Pre-Licensors, and County/Tribal Certifiers.

Certification workers needing access to the Dashboard may contact their [BRO Child Care Coordinator](#) or the [DCF Certification Specialist](#).

See [Assign User Roles](#) section for further details on how Dashboard Roles can be assigned.

# Accessing the Dashboard

The **Dashboard** link is located in the upper horizontal menu bar.



The Dashboard consists of three main sections:

- **My Assignments (CBU, regional licensing and pre-licensing staff):** Any tasks that are assigned to the user will appear here, as long as the status is In Progress, or Assigned.
- **Task Inbox:** This section includes all Task items for which the user has update access as long as the status is Pending.
- **Message Inbox (Certifiers, Licensing Regional, and pre-licensing staff):** This section shows all the messages pertaining to a county/tribe/region.

**Note:** To view tasks and messages, click on the arrow in the horizontal inbox bar to open the list.

Source	Assigned Date	Priority	Task Description	Task Status	Reassign	Details
WISCCRS - Licensing	03/26/2019	1-High	New Individual With Record Found Applicant Number: 1800054815 Location Number: 002 Individual Id Number: 0044300000	Assigned	<a href="#">Reassign</a>	
WISCCRS - Licensing	03/26/2019	4-Medium	New Individual With No Record Found Applicant Number: 1800085317 Location Number: 001 Individual Id Number: 0934300000	Assigned	<a href="#">Reassign</a>	
WISCCRS - Licensing	02/19/2019	4-Medium	New Individual - Minor With Concern Applicant Number: 7800084971 Location Number: 001 Individual Id Number: 0992300000	In Progress	<a href="#">Reassign</a>	

My Assignments 1 to 3 of 3 records found

Advanced Assignment Search

Task inbox

Message inbox

## Filtering Messages and Tasks

Facility, Individual Name, and Application Status (if application is pending for a facility the individual is attached to) are included in the Description field on the Task and Message lists. A filter that allows you to search the list by a key word is available.

**Example:** If you want to find all tasks/messages that have Application Pending as the status, type Application into the filter and choose 'Contains'. The results will display all tasks/messages that have the word 'application' included.

To view the complete list again, simply choose No Filter.

## Tasks – Provider Location Level

The Location Task link in the provider location navigation menu shows all tasks the system has generated for the location. In the Search section, the search can be narrowed to any time frame. To include Processed tasks, click on the Include Processed check box.

Source	Created Date	Priority	Assigned Admin Unit/Role	Task Description	Due Date	Status	Actions
WISCCRS - Licensing	3/28/2023	High	County: Milwaukee Role: Cbu - Supervisor	Background Check Non-Compliance - Forfeiture Provider Number: 1800039431 Location Number: 001 Facility Name: Sfta Cc Family Center	3/29/2023	Pending	<a href="#">Assign</a> <a href="#">Edit</a> <a href="#">Delete</a>
WISCCRS - Licensing	8/26/2022	High	County: Milwaukee Role: Cbu - Supervisor	Background Check Non-Compliance - Order Letter Facility Name: Sfta Cc Family Center	8/27/2022	Pending	<a href="#">Assign</a> <a href="#">Edit</a> <a href="#">Delete</a>
WISCCRS - Licensing	6/16/2022	High	County: Milwaukee Role: Cbu - Supervisor	Background Check Non-Compliance - 294 Facility Name: Sfta Cc Family Center	6/17/2022	Pending	<a href="#">Assign</a> <a href="#">Edit</a> <a href="#">Delete</a>

## Certification and Regional Licensing Users

This section explains the dashboard module pertaining to county certification, tribal certification, and regional licensing users.

### Tasks

If the worker has the dashboard role to receive tasks/messages for a county/tribe/region, the Task Inbox is defaulted to display tasks in Pending status.

The screenshot shows the WISCCRS Dashboard with the 'Task Inbox' section selected. A task in the list is highlighted with a red box. The task details are: Facility Name: Certified Tamasha, Individual Name: Horace Slughorn. The task status is Pending, with an edit icon also highlighted with a red box.

The link in the Task Description column takes the user to a screen that shows more details on the task.

The table below explains the columns for the tasks.

Field Name	Description
Source	<p>The source systems that create tasks are listed in this column. The options are:</p> <ol style="list-style-type: none"> <li>1. WISCCRS – Licensing (BECR Regional Licensing Staff)</li> <li>2. WISCCRS – Certification (Certification agencies)</li> <li>3. Child Care Provider Portal – <ul style="list-style-type: none"> <li>a. Messages when a certified provider adds an individual or a child care provider/facility enters a temporary closure in the Child Care Provider Portal (CCPP).</li> <li>b. Expression of Interest (EOI) related tasks</li> <li>c. Initial application related tasks</li> <li>d. Continuation/renewal related tasks</li> </ul> </li> </ol>
Created Date	The date the Task/Message was created.
Priority	The system marks the tasks as High and Messages as Medium priority.
Assigned Admin Unit/Role	<p>The location county/tribe for the child care provider is displayed here.</p> <p>The Dashboard currently has the following roles for messages:</p>

Field Name	Description
	<ul style="list-style-type: none"> <li>• BOB Team</li> <li>• CBU – Certification</li> <li>• CBU – Licensing</li> <li>• CBU – Supervisor</li> </ul> <ul style="list-style-type: none"> <li>• Certification (County/Tribal Certifiers): This value is displayed for tasks/messages created for the Certification inbox.</li> <li>• Licensing (BECR Regions): This value is displayed for tasks/messages sent to regions.</li> <li>• Pre-Licensing (Pre-Licensing Regions): This value is displayed for tasks/messages sent to pre-licensing regions.</li> </ul>
Description	This field explains the reason for the task/message. The Description is also a link that goes to the WISCCRS screen where the item can be viewed.
Status	The tasks/messages have Pending status when they are created. The status can be changed to In Progress, Processed, or Cancelled. The status should be changed to Processed when the reason for the task/message is completed.
Modify Icon	The pencil icon is a link that goes to the Modify Task/Message screen where the status and priority of the item can be changed, and comments entered. If the status is changed to Processed, the message is removed from the Inbox. Processed tasks can be viewed using the Advanced Inbox Search.
History Icon	The scroll icon is a link to the Task/Message History screen.

## Modify Task/Message

To change the message status to Processed, click on the Pencil/Modify icon on the **List Message** page.

Message Inbox						
Source	Created Date	Priority	Assigned Admin Unit/Role	Message Description	Message Status	
WISCCRS - Certification	03/28/2019	Medium	County: Milwaukee Role: Certification	Background Check Preliminary Decision Completed Facility Name: Pending Cert Individual Name: Tammy Teacher Status: Application Pending	Pending	 

On the **Modify Task/Message** page, the status can be changed.

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Modify Task	
Task/Message	Message
Task/Message Description	Background Check Preliminary Decision Completed Facility Name: Pending Cert Individual Name: Tammy Teacher Status: Application Pending
Tracking#	2846910000
Task Created Date	03/28/2019
Due Date	04/27/2019
Task Assigned User Role	Certification
Assign To	N/A
Priority	Medium
Status	Pending
Comments	<div style="border: 1px solid #ccc; padding: 5px; width: 150px;">         Pending  <span style="border: 2px solid red; padding: 2px;">Processed</span> </div>

This page can also be used to enter comments pertaining to the issue and to change the priority of the message.

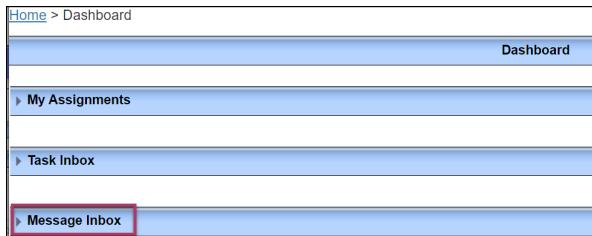
Tasks have additional statuses (Cancelled, In Progress, Pending and Processed) but the screen functions the same way as messages.

Modify Task	
Task/Message	Task
Task/Message Description	Certified Temporary Closure Facility Name: Certified Tamasha Individual Name: Horace Slughorn
Tracking#	2154530000
Task Created Date	04/23/2021
Due Date	04/24/2021
Task Assigned User Role	Certification
Assign To	N/A
Priority	High
Status	Pending
Comments	<div style="border: 1px solid #ccc; padding: 5px; width: 150px;">         Cancelled          In Progress  <span style="border: 2px solid blue; padding: 2px;">Pending</span>          Processed       </div>

**Note:** Users with certification/licensing role cannot assign/reassign tasks. However, BECR Office Managers and LPPAs have a security privilege that allows them to assign/reassign tasks.

## Messages

To access the Message Inbox, click on the arrow next to the Message Inbox Label.



Once expanded, the messages display.

Message Inbox					
Source	Created Date	Priority	Assigned Admin Unit/Role	Message Description	Message Status
WISCCRS - Licensing	05/31/2024	Medium	County: Milwaukee Role: Licensing	New License Application - Cbc Complete Status: Application Pending	Pending  

## List of Tasks/Messages

Certifiers, Pre-Licensors, and Licensing Staff can view messages when certain actions happen in WISCCRS/Child Care Provider Portal. The two sections below explain the Task/Message sections in more detail.

### County/Tribal Certification Staff (Role: Certification)

The following messages/tasks are generated to the Certification Inbox.

Type	Message	Inbox
Message	New Individual Added to Certified Location	This message is generated when a certified provider adds a new individual using the Child Care Provider Portal.
Message	Background Check Preliminary Decision Completed	This message is generated after DCF CBU staff has entered/modified <b>Preliminary</b> Status and Date for an individual associated with a certified provider location.
Message	Background Check Final Decision Completed	This message is generated after DCF CBU has entered/modified <b>Final</b> Status and Date for an individual associated with a certified provider location.
Message	New Certification Application – CBC Complete	This message is generated when the Fit/Unfit Date has been entered by the CBU for a provider location that has a pending initial application. Note that if the Fit/Unfit Date is modified for an initial application, a new message is generated.

Type	Message	Inbox
Message	Individual Final DecisionAppealed	This message is generated when the CBU receives an appeal for an individual associated with a certified program whose Final Decision in WISCCRS has been changed from Ineligible to Ineligible –Appealed.
Message	Certified TemporaryClosure End DateChanged	The message is generated in the following scenarios: <ol style="list-style-type: none"> <li>1. The end date of a previously entered closure in Reported Status has been modified to today's date or date in the past.</li> <li>2. End date is modified for an Official Closure in CCPP (any length)</li> </ol>
Message	Individual Final DecisionAppealed	The message is generated when an ineligible individual associated with a certified program has submitted an appeal.
Task	Certified TemporaryClosure	The task is generated in following scenarios: <ol style="list-style-type: none"> <li>1. A closure is entered in CCPP that triggers a task (Construction, COVID-19, or Damage to Property (any length), other reasons 5 consecutive days or longer)</li> <li>2. A closure that was less than 5 days has been modified in CCPP to be more than 5 days.</li> <li>3. A reason for closure that was less than 5 days if changed to Construction, Covid-19, or Damage to Property.</li> </ol> <p>Details on the temporary closure functionality is found in the <a href="#">Changes</a> user guide.</p>
Task	Background Check Non-Compliance – 294 – <b>BOS</b> (certification)	When a <b>certified</b> provider who received a CBC Overdue Notice has not become compliant, a task is generated at the same time the system creates the 294 violations for the certification worker to issue to the provider. This task is generated to all counties/tribes except Milwaukee. See the <a href="#">Background Check</a> user guide for more details on the CBC non-compliance process. <b>Certification workers can find step by step instructions in the Certification SharePoint site</b>
Task	BG Check Non-Compliance – Refer to Agency – <b>BOS</b>	Generated when a <b>certified</b> provider has not become compliant with the background check law ( <b>5-year fingerprint-based background check</b> ) after receiving a 294. See the <a href="#">Background Check</a> user guide for more details on the CBC non-compliance process.
Task	Background Check Compliance – <b>BOS</b>	Generated when a <b>certified</b> provider has become compliant with the background check law (5-year fingerprint-based background check). This is generated to all counties/tribes except Milwaukee. See the <a href="#">Background Check</a> user guide for more details on the CBC non-compliance process. <b>Certification workers can find step by step instructions in the Certification SharePoint site</b>
Task	EOI Submitted for Review	This task is generated when a CCPP user submits an Expression of Interest for certification.

Type	Message	Inbox
Task	Request to Withdraw EOI	This task is generated when a CCPP user requests to withdraw an Expression of Interest after submission.
Task	Initial Application for Review - Certification	This task is generated when an applicant submits an initial certification application.
Task	Request to withdraw Initial - Certification	This task is generated when an applicant has requested to withdraw the initial application. This is an opportunity for the certifier to reach out to see if they can provide assistance so the applicant can continue the process.
Task	Renewal Application for Review - Certification	This task is generated when a provider submits a certification renewal application.
Task	Request to withdraw renewal - Certification	This task is generated when a provider has requested to withdraw the renewal application.

## DCF BECR Licensing Region Staff (Role: Licensing)

The following messages/tasks are generated to the Licensing Region Inbox.

Type	Message	Inbox
Message	Background Check Final Decision Completed	This message is generated after DCF CBU has entered/modified <b>Final</b> Status and Date for an individual associated with a licensed provider location. The message is only generated if the individual's role is Household Member or Applicant/Licensee.
Message	Employee Background Check Decision – Ineligible	This message is generated when an individual associated with a licensed program has been found ineligible. This applies to individuals in both prospective and current status. The message is generated for an individual in any role, except Applicant/Licensee.
Message	New License Application – CBC Complete	This message is generated when the CBU or Licensing staff has entered the Fit/Unfit Date for a facility with a pending initial application, or when the Fit/Unfit Date is modified for an initial application.
Message	Licensed Temporary Closure End Date Changed	The message is generated in when the end date of a previously entered closure in Reported Status or Official Closure of any length of time has been modified to today's date or a date in the past.
Task	Licensed Temporary Closure	<p>The task is generated in following scenarios:</p> <ul style="list-style-type: none"> <li>• A closure is entered in CCPP that triggers a task. Reasons: Construction, COVID-19, or Damage to Property (any length), other reasons (5 consecutive days or longer)</li> <li>• A closure that was less than 5 days has been modified in CCPP to be more than 5 days.</li> <li>• If a reason for closure that was less than 5 days is changed to Construction, COVID-19, or Damage to Property.</li> </ul> <p>Details on the temporary closure functionality is found in the <a href="#">Changes</a> user guide.</p>

Type	Message	Inbox
Task	EOI Submitted for Review	This task is generated when a CCPP user submits an Expression of Interest for a day camp.
Task	Request to Withdraw EOI	This task is generated when a CCPP user requests to withdraw an Expression of Interest after submission.
Task	Initial Application for Review - Licensing	This task is generated when an applicant submits an initial licensing application.
Task	Request to withdraw Initial - Licensing	This task is generated when an applicant requests to withdraw an initial licensing application. This is an opportunity to reach out and provide assistance so the applicant can continue the process.
Task	Continuation application for review	This task is generated when a provider submits a licensing continuation application.
Task	Request to withdraw Continuation	This task is generated when a provider has requested to withdraw a licensing continuation application.

## Pre-Licensing Agency Staff (Role: Pre-licensing)

When a CCPP user submits an Expression of Interest (EOI) using the Child Care Provider Portal, the tasks are generated to the task inbox.

Below is a list of tasks for this inbox:

Type	Description	Inbox
Task	EOI submitted for Review	This task is generated when a CCPP user submits an Expression of Interest for licensed family or group.
Task	Request to Withdraw EOI	This task is generated when a CCPP user requests to withdraw an Expression of Interest after submission.

## Central office (Role: BOP Team)

When a provider submits a request to have the center's website added to the Child Care Finder, a task is generated to the BOP Team inbox for approval.

Type	Description	Inbox
Task	Provider website address updated	When a provider adds a website URL in CCPP, a task is generated so the website can be approved and forwarded to childcare finder.

# Reassign Task – DCF CBU, Regional Office Managers, and Pre-Licensing Lead Staff Only

Tasks can be reassigned to another worker. Click on the **Reassign** link on the task list to access the **Reassign Task** screen. Certification, licensors, and pre-licensing workers do not see the Reassign link.

WISCCRS - Licensing	03/28/2019	4-Medium	New Individual With No Record Found Facility Name: Pending Cert Individual Name: Tammy Teacher Status: Application Pending	In Progress	<b>Reassign</b>		
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On the **Reassign Task** screen, the task can be assigned to another user. This screen is almost identical to the **Assign** screen.

Reassign Task	
Task Description	New Individual With No Record Found Facility Name: Pending Cert Individual Name: Tammy Teacher Status: Application Pending
Tracking#	2946910000
Task Created Date	3/28/2019
Due Date	3/29/2019
Task Assigned User Role	Cbu - Licensing <input type="checkbox"/> Assign To Different Role
Status	In Progress
<b>Reassign From *</b>	Ben Backgroundchecker
Reassign To	<input type="button" value="▼"/>
<b>Priority *</b>	4-Medium
Comments	<input type="text"/>

## Task History

To view history for a task, click on the scroll icon.

Tasks/Messages							
Source	Created Date	Priority	Assigned Admin Unit/Role	Task Description	Due Date	Status	
⚠ WISCCRS - Licensing	3/27/2018	Low	County: Kenosha Role: Cbu - Licensing	Individual Background Check - Licensing Applicant Number: 0800079503 Location Number: 001 Individual Id Number: 0000002725 Tracking Number: 2942510000	3/28/2018	Processed	

The following page displays:

Task Details							
Task/Message Task				Source Wiscrrs - Licensing			
Task Created Date 03/27/2018				Due Date 03/28/2018			
Tracking# 2842510000							
<input type="checkbox"/> Show All Comment Text							
Priority	Status	Comments					Updated Date
Low	Processed	modify task test case, changed to processed. ADF ASDKLJF ASDFT ASDFKLJA SDFJLK ALKDFJ LAKSDJ FALSD...					<a href="#">03/27/2018</a>
Low	Processed	modify task test case, changed to processed.					<a href="#">03/27/2018</a>
Low	In Progress	modify task test case					<a href="#">03/27/2018</a>
High	Pending						<a href="#">03/27/2018</a>

This screen shows if any changes were made to the task and the date the updates were made. The **Updated Date** link displays a screen with the User ID and Name of the person who updated the task.

## List of Tasks - DCF CBU Staff (Role: CBU, CBU Supervisor, )

Below is a list of tasks generated to the CBU inboxes.

Role	Description	Comments
CBU Licensing	Background check Compliance	Generated when a <b>licensed</b> facility with CBC non-compliance has become compliant.
CBU Licensing	Background Check Non-Compliance – 294	This task is generated 30-days after the Overdue Notice date if there are still individuals in a <b>licensed</b> facility or a <b>certified provider in Milwaukee County</b> who have not submitted their fingerprints and they were listed on the notice.
CBU Licensing	Background Check Non-Compliance – Forfeiture	Generated if a <b>licensed</b> facility with CBC order enforcement has not corrected the fingerprint violation.
CBU Licensing	Background Check Non-Compliance – Order	Generated if a <b>licensed</b> facility with CBC 294 violation has not corrected the fingerprint violation.
CBU Licensing	Background Check Non-Compliance – Refer to agency	Generated when a <b>licensed</b> facility or <b>certified provider in Milwaukee County</b> has not corrected the CBC violations and the case need to be referred to the regional office.
CBU Licensing	Background Check Non-Compliance – Suspension	Generated when a <b>certified</b> provider in Milwaukee County has not corrected the CBC 294.
CBU Supervisor	Background check skipped due to previous ineligibility	If an individual who's initial or 5-year FBI final decision is Ineligible and the person's status is active, this task is generated at the time when the next Annual DOJ is due.
CBU Supervisor	Eligible, unaffiliated applicant/licensee added	This task is created so that CBU can add the Fit Date to the pending application.
CBU Supervisor	Fit Date needed for Applicant/Licensee	This task is generated once all individuals associated with a pending facility have Final Decision entered.
CBU Licensing	Individual – CPS Possible Match	This task is generated if there is a potential match found during the monthly CPS batch.
CBU Licensing	Individual Annual DOJ – Barred Offense	Annual DOJ results for a current individual includes a potential barred offense.
CBU Licensing	Individual Annual DOJ – Record found	Annual DOJ results for a current individual includes a new offense that is not a barred offense.
CBU Licensing	Individual CCAP – Disposition change	This task is generated when the monthly matches bring in a change to an individual's previously received record.
CBU Licensing	Individual CCAP – New Charge	This task is generated when the monthly matches bring in a new charge.
CBU Licensing	Individual Initial DOJ	This is created when DOJ results have been received on a minor employee. This check is also conducted on all new individuals during the Covid-19 health emergency.
CBU Licensing	Individual with barred offense	FBI/DOJ results received for a <b>current</b> individual with possible barred offense(s).
CBU Licensing	New individual with no record found	No longer used.
CBU Licensing	New Individual with record found–Replaced with New individual with other record found'.	These scenarios will receive 'New individual with other record found'.
CBU Licensing	Individual with NSOR Record found-Replaced by 'Individual with other record found'.	Replaced by 'Individual with other record found'.
CBU Licensing	Individual with other record found	This task is triggered when there is either no record, or no new record or a non-barred record is received from FBI/DOJ for a 5-year FBI. However, this task is generated

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Role	Description	Comments
		if there is a record in CPS, SOR, CCAP, Regulatory History, or BCR has a 'yes' answer, manual check is needed.
CBU Licensing	Individual with out-of-state history	FBI/DOJ results have been received for a <b>current</b> individual who has out-of-state history (either home address outside WI or the person indicated on his/her BCR that s/he has resided outside WI within the last 5 years).
CBU Licensing	Minor CCAP record found	This task is generated when a the CCAP interface brings a record that relates to Child Care for a minor household member.
CBU Licensing	Minor turning 10	No longer used.
CBU Licensing	New Individual – Minor with Concern	This task is generated when a minor has answered Yes to the Minor Delinquency question on BCR.
CBU Supervisor	New Individual – Verify Background check exemption	An applicant/licensee has been entered by provider with Applicant/Licensee – Exempt role. If a certifier/regional staff enters an applicant/licensee – exempt, no task is generated.
CBU Licensing	New individual with barred offense	FBI/DOJ results received for a <b>new</b> individual with possible barred offense(s).
CBU Licensing	New individual with no record found	No longer used.
CBU Licensing	New Individual with other record found	This task is triggered when either no record or a non-barred record is received from FBI/DOJ for an initial FBI check. However, this task is generated if there is a record in CPS, SOR, CCAP, Regulatory History, BCR has a Yes answer, manual CRL check is needed.
CBU Licensing	New Individual with out-of-state history	FBI/DOJ results have been received for an individual who has out-of-state history (either home address outside WI or the person indicated on his/her Background Check Request form (BCR) that s/he has resided outside WI within the last 5 years).
CBU Supervisor	Preliminary Ineligibility Review Needed	When the CBU analyst completes the BCAS and marks the Preliminary Decision to Ineligible, a task is generated to the Supervisor who will update the episode after reviewing the record.
CBU Supervisor	Role Change Request	If an individual's role is changed from a lower to a higher level (Example: Non-caregiver to caregiver), a task is generated so the CBU staff can re-evaluate the latest episode.
CBU Licensing	SOR – Address match	This task is generated if there is an address match found during the daily or monthly SOR batch.
CBU Licensing	Unaffiliated Individual	Individuals requesting access via iChild Care are now included in the new individual tasks.
CBU Licensing	SOR – Address Match	This task is generated when a potential address match has been received for a facility.

## Advanced Inbox Search

The advanced search allows staff, who have the access, to search the Inbox for tasks/messages for an agency.

## WISCCRS User Guide – Dashboard



To access this page, click the Advanced Inbox Search link.

A screenshot of the 'Advanced Inbox Search' search criteria page. The page has a header 'Advanced Inbox Search' and a 'Reset search criteria' button. The search criteria are organized into several sections: 'Task/Message \*' (Task), 'Source \*' (Wisccrs - Licensing), 'Admin Unit' (County), 'County' (All Counties), 'Assigned User Role' (Cbu - Supervisor), 'Status' (Pending), 'Type' (All items checked), 'Task Created Date' (2/28/2019 to 3/29/2019), 'Due Date' (empty), 'Tracking Number' (Enter 10 Digit ID), and 'Task Related To' (empty). Each section has a dropdown menu or a date range selector.

Below are descriptions for each field on this page.

Field Name	Description
Task/Message	Choose Task or Message
Source	The systems that create tasks/message are listed in the drop-down menu. The <b>WISCCRS</b> options are: <ol style="list-style-type: none"><li>1. WISCCRS – Licensing</li><li>2. WISCCRS – Certification</li></ol>
Admin Unit	This value is defaulted to County.
County	All Counties is set as the default value. All counties and tribes in Wisconsin are listed. In addition, State and State of Wisconsin are options.
Assigned User Role	The Dashboard currently has the following roles: <ul style="list-style-type: none"><li>• <b>BOP Team:</b> Choose this to filter all BOP messages.</li><li>• <b>CBU – Certification:</b> This value is not currently used.</li><li>• <b>CBU – Licensing:</b> Choose this to filter all CBU Licensing messages.</li><li>• <b>CBU – Supervisor:</b> Choose this to filter all CBU Supervisor messages.</li><li>• <b>Certification:</b> Choose this to filter all certification messages.</li><li>• <b>Licensing:</b> Choose this to filter all licensing messages.</li></ul>

Field Name	Description
	<ul style="list-style-type: none"> <li>• <b>Pre-Licensing:</b> Choose to view tasks pertaining to Expression of Interest received for licensed family and/or group.</li> </ul>
Status	<p>The value is defaulted to Pending. Multiple values can be chosen on the drop-down menu.</p> <p>The following values are available:</p> <ul style="list-style-type: none"> <li>• Check All (this value will include all statuses)</li> <li>• Assigned</li> <li>• Cancelled</li> <li>• In Progress</li> <li>• Pending</li> <li>• Processed</li> </ul>
Type	<p>All items checked is the default value. If this value is chosen, all task types are included in the search. Multiple values can be chosen and are available to choose.</p>
Task Created Date	<p>You can search the tasks by the Created Date range. The dates are defaulted to 30 days prior to the current date through the current date. The dates can be modified. To search tasks without a time frame, delete both dates.</p>
Due Dates	<p>The Due Date field was eliminated from the List Tasks pages. However, the system still sets the due date at one day after the Created Date for tasks and 30 days for messages.</p>
Tracking Number	<p>When a task is generated, the system assigns a unique number for the task. A specific tracking number can be searched.</p>
Task Related to	<p>You can search using the following numbers:</p> <ul style="list-style-type: none"> <li>• <b>Applicant/Location #:</b> Use this if you want to filter all tasks for a facility.</li> <li>• <b>Individual/ID number:</b> Use this to find tasks/messages for an individual.</li> <li>• <b>Provider/Location #:</b> Searching by provider number does not bring tasks in WISCCRS. To find tasks/messages pertaining to a facility, use the Applicant/Location number.</li> </ul>
Provider/ Location/ Applicant/ Individual ID Number	<p>Once the value above has been chosen, enter the number(s) to search in these additional fields here.</p>

## **Reset Search Criteria**

The Advanced Inbox and Advanced Assignments search is frozen to the values the user chose. If you need to change the search, press the Reset Search Criteria link on the top right-hand side of the page to reset the search values to the defaults.

## Processing Tasks

Below are steps to complete the task:

1. Click the Task Description link of the task.
  - a. It is recommended to right-click on the link and open in a separate tab. This will keep the dashboard open on the original tab.



2. Some users may want to change the status to In Progress while working on the task.
3. Complete the steps required by the task.
4. Once complete, mark the task as Processed.

NOTE: When a task is changed to Processed, it will no longer be visible on the dashboard. When the task is changed from Pending or Assigned to Processed, a Warning message will pop up asking if you intended to skip a status. Confirm to move past the message.

## DCF CBU Supervisor

Certain tasks are assigned to users who have the CBU Supervisor role. Users with the CBU Supervisor role can assign pending tasks.

When the supervisor logs into the Dashboard, the Task Inbox shows the list of tasks for the counties that the user has a Dashboard Role(s) for.

Task Inbox						
Source	Created Date	Priority	Assigned Admin Unit/Role	Task Description	Task Status	
WISCCRS - Licensing	04/13/2018	Low	County: Milwaukee Role: Cbu - Licensing	<a href="#">Individual Background Check - Licensing</a> Applicant Number: 800074701 Location Number: 001 Individual Id Number: 00000000255	Pending	<a href="#">Assign</a>  
WISCCRS - Licensing	04/18/2018	High	County: Milwaukee Role: Cbu - Licensing	<a href="#">Individual Background Check - Licensing</a> Applicant Number: 2800011327 Location Number: 001 Individual Id Number: 00000000122	Pending	<a href="#">Assign</a>  

The page shows the tasks in Pending status as a default. However, clicking the In Progress and/or Assigned check boxes (Task Inbox) will add those tasks to the list. The list of tasks/messages can be sorted by clicking the column headers.

The table below explains each column on the page (see screenshot) above.

Field Name	Description
Source	The source systems that create tasks are listed in this column. The options are: <ol style="list-style-type: none"> <li>1. WISCCRS – Licensing</li> <li>2. WISCCRS - Certification</li> </ol>
Created Date	The date the Task/Message was created.
Priority	See the task list under List of Tasks - DCF CBU Staff section.
Assigned Admin Unit/Role	The location county for the Child Care provider is displayed here. The Dashboard currently has the following roles: <ul style="list-style-type: none"> <li>• CBU – Licensing (CBU staff inbox)</li> <li>• CBU – Certification (CBU staff inbox): This value is not currently used.</li> <li>• CBU – Supervisor</li> </ul>
Task Description	This field explains the reason for the task. The Description is also a link that points to the WISCCRS screen where the task can be completed.
Status	Below is a list of values for this field: <ul style="list-style-type: none"> <li>• Assigned</li> <li>• In Progress</li> <li>• Pending (all newly generated tasks have this status)</li> </ul>
Assign/Reassign – Task Inbox Only	If the status is Pending, an Assign link will display. If the status is In Progress or Assigned, a Reassign link displays. If status is Cancelled or Processed, there is no Assign or Reassign link available. If the status is

Field Name	Description
	In Progress or Assigned and the task has been assigned to a user, the name of the assigned user is displayed. This link goes to the Assign or Reassign Task screen, where the task can be assigned to a worker in the agency. <b>Note</b> that only tasks can be assigned. Messages do not have this link.
Modify Icon	This icon is a link that goes to the Modify Task/Message screen where the status of the item can be changed, and comments entered.
History Icon	This icon is a link to the Task/Message History screen.

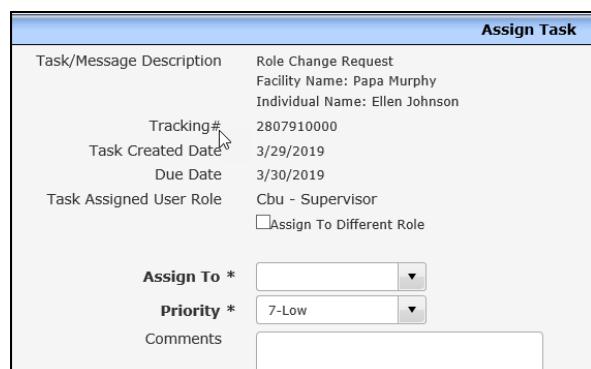
## Assign Task – DCF CBU Staff, Regional OMs, LPPAs, and Pre-licensing Leads Only

CBU supervisors, licensing office managers/LPPAs, and pre-licensing lead staff are able to assign tasks in the inbox. The tasks can be assigned to users who have a role with security access to update tasks. To access the Assign Task page, click the Assign link next to the task.



The screenshot shows a table titled 'Task inbox' with a single row. The row contains columns for Source (WISCCRS - Licensing), Created Date (03/29/2019), Priority (7-Low), Assigned Admin Unit/Role (County: Milwaukee, Role: Cbu - Supervisor), Task Description (Role Change Request, Facility Name: Papa Murphy, Individual Name: Ellen Johnson), Task Status (Pending), and a set of icons. The 'Assign' icon is highlighted with a red box.

The following screen displays.



The screenshot shows the 'Assign Task' page. The top section displays task details: Task/Message Description (Role Change Request, Facility Name: Papa Murphy, Individual Name: Ellen Johnson), Tracking# (2807910000), Task Created Date (3/29/2019), Due Date (3/30/2019), Task Assigned User Role (Cbu - Supervisor), and a checkbox for 'Assign To Different Role'. Below this, there are fields for 'Assign To \*' (dropdown menu), 'Priority \*' (dropdown menu with '7-Low' selected), and 'Comments' (text area).

The upper portion of this screen displays the details about the task. Below are the explanations for the updatable fields.

Field Name	Description
Assign to Different Role	If the task needs to be assigned to a user who has a different role, click on the check box. This will bring up all users with that role on the Assign To field.
Assign To	Users who have been given the dashboard role that matches the role of the task will display in the drop down menu.
Assigned Priority	Values are High, Medium, and Low.

Field Name	Description
Comments	Comments can be entered for the task.

## Multi-Assignments – CBU Supervisor, Regional OMs, LPPAs, and Pre-Licensing Leads only

Users with this security access can assign multiple tasks at once. This can be done using the Advanced Assignment or Advanced Search pages.

To assign multiple tasks, take the following steps:

1. Conduct a search to filter tasks you want to assign to a worker. Example: Ben Backgroundchecker, a CBU staff is on a medical leave for an extended time period. To reassign his tasks to another worker first conduct a search in the Advanced Assignment Search module. First choose the Role to be CBU-Licensing because Ben does not have a supervisor role. Then choose Ben from the list. To include all Ben's tasks to the search, choose All Items Checked in the Status field. Delete Task Created Date fields.

2. The search results on the lower section of the page show all tasks that Ben has been assigned to. On the top of the search results, choose CBU Licensing value in the Role/Admin Unit field. This will bring up all staff with that role in the Reassign To field. Choose the staff who will be reassigned Ben's tasks. On the left side of the list, click on Check All if all tasks should be reassigned or check one by one if only certain tasks should be reassigned.

**Hint:** When assigning tasks that relate to pending license/certification application, access the Advanced Inbox Search, and enter 'application' in the filter in the Task Description column. This

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will bring up all tasks with Status = Application Pending. They can all be assigned to one worker at once.

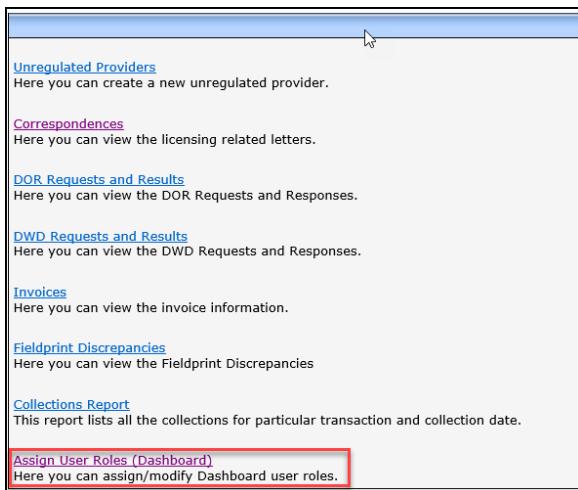
## Assign User Roles – Dashboard – Central Office

### Staff/Regional Office Managers Only

Before a WISCCRS user can view and update tasks/messages in the Dashboard, the user must be assigned a role. The user must have update access to WISCCRS before the role can be assigned.

All DCF Central Office Staff and **BECR Office Managers** are able to assign roles.

To access the Assign User Role module, click the Administration link on the WISCCRS Home page and choose the Assign User Roles (Dashboard) link on the bottom of the page.



On the Assign Roles for Users page, you can conduct a search for users with update access to WISCCRS.

Assign Roles For Users	
Domain Type *	Wisccrs - Licensing
Administrative Unit Type *	County
Administrative Unit *	Dodge
User Role *	CBU - Licensing
User	
<input type="checkbox"/> Show Only Users For This Role	

To assign a role to staff, follow these steps:

- Domain Type:** Choose WISCCRS or WISCCRS - Licensing.
- Administrative Unit Type:** Choose County (Region cannot be used at this time.)
- Administrative Unit:** Choose the county/tribe.

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4. **User Role:** Choose CBU – Certification/ Certification/ CBU – Licensing/ BOP Team / LICENSING/ CBU - Supervisor.

The results for the above search show all users who have update access for the chosen criteria.

The users highlighted in gray (see screenshot below) have already been assigned the specific role to the Dashboard.

If additional staff should be assigned to the same role, click the check box next to the name of the staff members.

	First Name	Last Name	User Name	Begin Date	End Date
<input type="checkbox"/>	Pirkko	Molainen	dogwoodker	12/01/2011	
<input checked="" type="checkbox"/>	Pirkko-Cbu	Molainen	PIRKKOCBU	03/26/2018	
<input type="checkbox"/>	Deloitte	Occ	DeloitteOCC	10/29/2004	
<input type="checkbox"/>	Dileepkumar	Kamath	kamatlOCC	09/08/2004	

5. To see who in the agency already has a specific role, click on the Show Only Users for This Role check box. The search results will only display those users who already have been assigned the chosen role.
  - If this is left unchecked, all users with licensing update access to the specific county will be listed.
6. To add the role to those people, click the Apply button at the bottom of the page.

To remove the Dashboard update role for a user, uncheck the box next to the user's name.

Click the history icon to view updates to a user's roles.

## Users with Update Access for Multiple Counties/Tribes

If a user needs Dashboard update access for multiple counties, the role for each county has to be added one at a time. If the user needs both certification and licensing roles, those roles also have to be given one at a time.

## Provider Website Submissions

Child care programs can submit a request to have their website address (URL) posted on the [Child Care Finder website](#) from CCPP.

These requests create tasks in the Dashboard for the BOP Team. DCF BOP IT staff validates and approves the URL's.

**Note:** During the approval process, make sure the websites are only advertising the provider's child care business. The approval functionality is explained in the [Basics](#) user guide.

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After the URL has been approved or denied, access the Dashboard again to mark the Task Processed.

When the status of the request is Processed, the URL is sent to the Child Care Finder website overnight.

The following day, the website is added to the Facility Details section on the Child Care Finder website.

Provider Details					
<b>Accredited Provider</b> City Of Madison Accredited					
	Abo Child Care	Provider #	2800039412	Months Open	Jan - Dec
	Annas Child Care Fis	Location #	001	Day Capacity	8
	111 New Address	Facility #	1122341	Night Capacity	0
	Annapolis WI 12345-6789	Regulation Type	Licensed Family		
	Milwaukee County	Applicant/Licensee	Anna Applicant-Smith	Hours	Mon-Fri 6:00AM - 6:00PM Sat-Sun Closed
<b>Contact Information</b>					
Anna-Maria Applicant	Ages Served				
(123) 456-7891	0 Week(s) - 17 Year(s)				
<a href="#">Visit Provider Website</a>					