



# Wisconsin Childcare Regulatory System (WISCCRS)

User Guide

Dashboard

January 2024

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 childcare system (CSAW, YoungStar, Childcare Provider Portal and other users in WISCCRS). The dashboard enables communication ~~or~~ 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 (task) needs to be completed.

As mentioned above, a task or message can be generated by any of the childcare systems. The WISCCRS Dashboard distributes tasks and messages to users' inboxes. The tasks can be assigned or reassigned to other users (CBU only). 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 worker can complete the task. Depending on the task, this work may change the status of the task to Processed.

For example, a supervisor receives a new background check task in their inbox. The supervisor can assign that task to a childcare background check unit worker. When assigned, the 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 processes 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 (i.e., processed), 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

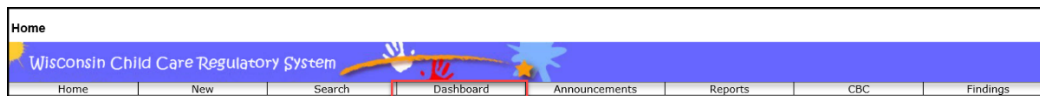
Users needing access to the Dashboard are assigned a role by the Administrator (DCF Central Office Staff). DCF Central Office staff assigns Dashboard roles for BECR Regional Licensing Staff and County/Tribal Certifiers.

Certification workers needing access to the Dashboard may contact their [BRO Childcare 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:

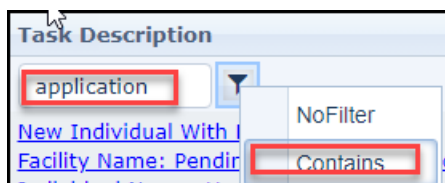
- **My Assignments (CBU only):** Any tasks that are assigned to the user will appear here, as long as the status is In Progress, or Assigned.
- **Task Inbox:** This section includes all Task inbox items for which the user has update access as long as the status is Pending.
- **Message Inbox (Certifiers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



## 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 has also been added.

**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. The same method can be used to find all tasks for a specific program.



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.



<b>Location Details</b> <a href="#">Location</a> <a href="#">Child Care Finder Listing</a> <a href="#">CCRR Location Details</a> <a href="#">Subsidy Details</a> <a href="#">Public Collaborations</a> <a href="#">Pets</a> <a href="#">Other Licenses</a> <a href="#">Transportations</a> <a href="#">Closures</a> <a href="#">Insurances</a> <a href="#">Comments</a> <a href="#">Messages</a> <a href="#">Alternate Addresses</a> <a href="#">Transactions</a> <a href="#">Collections</a> <a href="#">Individuals</a> <a href="#">CBC Compliance Details</a> <a href="#">SOR Address Match</a> <b>Location Tasks</b> <a href="#">Registry Details</a> <a href="#">Registry Staff</a>	<div>Search</div> <div> Begin Date <input type="text" value="1/1/2022"/> End Date <input type="text" value="9/27/2023"/> <input type="checkbox"/> Include Cancelled <input checked="" type="checkbox"/> Include Processed </div> <div>Total No. of Rows Retrieved: 3 <span>Search</span></div>									
	<div>List of Tasks - Provider/Location</div>									
	Source	Created Date	Priority	Assigned Admin Unit/Role	Task Description	Due Date	Status			
	WISCCRS - Licensing	3/28/2023	High	County: Milwaukee Role: Cbu - Supervisor	<a href="#">Background Check Non-Compliance - Forfeiture</a> <a href="#">Provider Number: 1800039431</a> <a href="#">Location Number: 001</a> <a href="#">Facility Name: Sfta Cc Family Center</a>	3/29/2023	Pending	<a href="#">Assign</a>		
	WISCCRS - Licensing	8/26/2022	High	County: Milwaukee Role: Cbu - Supervisor	<a href="#">Background Check Non-Compliance - Order Letter</a> <a href="#">Facility Name: Sfta Cc Family Center</a>	8/27/2022	Pending	<a href="#">Assign</a>		
	WISCCRS - Licensing	6/16/2022	High	County: Milwaukee Role: Cbu - Supervisor	<a href="#">Background Check Non-Compliance - 294</a> <a href="#">Facility Name: Sfta Cc Family Center</a>	6/17/2022	Pending	<a href="#">Assign</a>		

## Certification and Licensing Regional Users

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

Dashboard						
My Assignments						
Source	Assigned Date	Priority	Task Description	Task Status		
No records to display.						
My Assignments 0 to 0 of 0 records found						
Task Inbox						
Source	Created Date	Priority	Assigned Admin Unit/Role	Task Description	Task Status	
Provider Portal	04/23/2021	High	County: Milwaukee Role: Certification	<a href="#">Certified Temporary Closure Facility Name: Certified Tamasha Individual Name: Horace Slughorn</a>	Pending	 
Tasks 1 to 1 of 1 records found						
Message Inbox						

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/messages.

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. Provider Portal – Messages when a certified provider adds an individual or a child care provider/facility enters a temporary closure in CCPP</li> </ol>
Created Date	The date the Task/Message was created.
Priority	The system marks the tasks as High and Messages Medium priority.
Assigned Admin Unit/Role	<p>The location county for the child care provider is displayed here.</p> <p>The Dashboard currently has the following roles for messages:</p> <ul style="list-style-type: none"> <li>• Certification (County/Tribal Certifiers): This value is displayed for tasks/messages created into Certification inbox.</li> <li>• Licensing (BECR Region): This value is displayed for tasks/messages sent to regions.</li> </ul>

Field Name	Description
Description	This field explains the reason for the task/message. The Description is also a link that points 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 <b>In Progress or Cancelled. The status should be changed to</b> Processed when the reason for the task/message is complete.
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.

To modify the task/message, select the modify icon next to the task. On the **Modify Task** page, you can change the status.

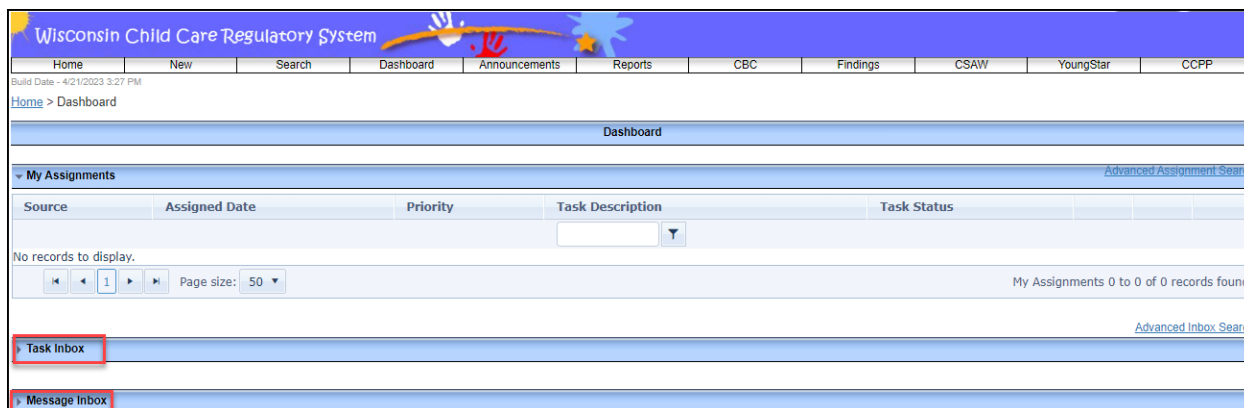
Modify Task	
Task/Message	Task
Task/Message Description	Certified Temporary Closure Facility Name: Certified Tamasha Individual Name: Horace Slughorn
Tracking#	2154530000
Task Created Date	04/23/2021
Due Date	04/24/2021
Task Assigned User Role	Certification
Assign To	N/A
Priority	High
Status	Pending
Comments	<div> <div>Cancelled</div> <div>In Progress</div> <div>Pending</div> <div>Processed</div> </div>





**Note that regional/county/tribal tasks cannot be assigned.**

## Tasks/Messages

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





Once expanded, the messages display.

Message Inbox						
Source	Created Date	Priority	Assigned Admin Unit/Role	Message Description	Message Status	
WISCCRS - Certification	03/28/2019	Medium	County: Milwaukee Role: Certification	<a href="#">Background Check Preliminary Decision Completed</a> <a href="#">Facility Name: Pending Cert</a> <a href="#">Individual Name: Tammy Teacher</a> <a href="#">Status: Application Pending</a>	Pending	 
WISCCRS - Certification	03/27/2019	Medium	County: Milwaukee Role: Certification	<a href="#">New Certification Application - Cbc Complete</a> <a href="#">Facility Name: Dana's Dolls</a> <a href="#">Status: Application Pending</a>	Pending	 

## 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	<a href="#">Background Check Preliminary Decision Completed</a> <a href="#">Facility Name: Pending Cert</a> <a href="#">Individual Name: Tammy Teacher</a> <a href="#">Status: Application Pending</a>	Pending	 

On the **Modify Message** page, the status can be changed to Processed.

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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> <div>Pending</div> <div>Processed</div> </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.

## List of Tasks/Messages

Certifiers and Licensing Regional Staff can view messages when certain actions happen in WISCCRS/Provider Portal. The two sections below explain the messages 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 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.
Message	Individual Final Decision Appealed	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.

Type	Message	Inbox
Message	Certified Temporary Closure End Date Changed	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 Decision Appealed	The message is generated when an ineligible individual associated with a certified program has submitted an appeal.
Task	Certified Temporary Closure	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> Details on the temporary closure functionality is found in the ' <a href="#">Changes</a> ' user guide.
Task	Background Check Non-Compliance – 294 – BOS (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 violation 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.
Task	Bg Check Non-Compliance – Refer to Agency - BOS	Generated when a <b>certified</b> provider has not become compliant with the background check law 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 – BOS	Generated when a <b>certified</b> provider has become compliant with the background check law. 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.

### 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.

Type	Message	Inbox
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 staff has entered the Fit/Unfit Date for a facility with a pending initial application. Note that if the Fit/Unfit Date is modified for an initial application, a new message is generated.
Message	Licensed Temporary Closure End Date Changed	The message is generated in the following scenarios: <ul style="list-style-type: none"> <li>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>End date is modified for an Official Closure in CCPP (any length)</li> </ul>
Task	Licensed Temporary Closure	The task is generated in following scenarios: <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 if 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>

## Dashboard – DCF CBU Screens

### My Assignments – CBU Staff Only

When CBU staff access the Dashboard, all tasks assigned to that individual are displayed in the My Assignment section.


My Assignments					
Source	Assigned Date	Priority	Task Description	Task Status	
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	<a href="#">Reassign</a>  
WISCCRS - Licensing	03/28/2019	4-Medium	New Individual With No Record Found Facility Name: Pending Care Third Location Sero Individual Name: Hans Householdmember Status: Application Pending	Assigned	<a href="#">Reassign</a>  

The section has the following fields.

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>
Assigned Date	The date the task was assigned to the user.
Priority	Priority of the task.
Task Description	This field explains the reason for the task and also includes a link to the WISCCRS screen where the task can be completed. Facility, Individual Names and Application Pending status (if there is an initial application for the location) display.
Task Status	The status of the task is shown.
Reassign	This link takes you to a page where the task can be reassigned to another worker.
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 Assignment History screen.

## Modify Task

To access the **Modify Task** screen, click on the pencil icon of the task/message.

My Assignments						
Source	Assigned Date	Priority	Task Description	Task Status		
WISCCRS - Licensing	03/28/2019	4-Medium	<a href="#">New Individual With No Record Found</a> <a href="#">Facility Name: Pending Cert</a> <a href="#">Individual Name: Tammy Teacher</a> <a href="#">Status: Application Pending</a>	In Progress	<a href="#">Reassign</a>	


The following screen displays.

Modify Task Assignment	
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
Assign To	Ben Backgroundchecker
Priority *	4-Medium
Status *	In Progress
Comments	<div>Assigned</div> <div>Cancelled</div> <div>In Progress</div> <div>Processed</div>

The upper section of this screen displays the details of the task/message. The updatable fields are Priority, Status, and Comments.

## Reassign Task – DCF CBU Staff Only

Tasks can be reassigned to another worker. Click on the **Reassign** link on the task list to access the **Reassign Task** screen.

WISCCRS - Licensing	03/28/2019	4-Medium	<a href="#">New Individual With No Record Found</a> <a href="#">Facility Name: Pending Cert</a> <a href="#">Individual Name: Tammy Teacher</a> <a href="#">Status: Application Pending</a>	In Progress	<a href="#">Reassign</a>	
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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
Reassign From *	Ben Backgroundchecker
Reassign To	
Priority *	4-Medium
Comments	

## 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: 9890079503 Location Number: 001 Individual Id Number: 0000002725 Tracking Number: 2842510000	3/28/2018	Processed

The following page displays.

Task Details			
Task/Message Task		Source Wiscrs - Licensing	
Task Created Date 03/27/2018		Due Date 03/28/2018	
Tracking# 2842510000			
Task History			
<input type="checkbox"/> Show All Comment Text			
Priority	Status	Comments	Updated Date
Low	Processed	modify task test case. changed to processed. ADF ASDKLFJ ASDFJ ASDFKLIA SDFJLK ALKDJF LAKSDJ FALSDJ...	03/27/2018
Low	Processed	modify task test case. changed to processed.	03/27/2018
Low	In Progress	modify task test case	03/27/2018
High	Pending		03/27/2018

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 and 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 provider in Milwaukee county</b> has not corrected the CBC 294.
CBU Supervisor	Background check skipped due to previous ineligibility	If an individual whose 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.

Role	Description	Comments
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 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 childcare 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).




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Role	Description	Comments
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 iChildCare 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.

## Task Assignment History – CBU Only

To access assignment history for a task, access the Advanced Assignment Search module and conduct a search for the task.

Task Assignments								
Source	Assigned Date	Priority	Assigned User	Task Description	Due Date	Status	Reassign	
WISCCRS - Licensing	4/6/2018	High	Pirkko Occ User	Individual Background Check - Licensing Applicant Number: 9800074192 Location Number: 003 Individual Id Number: 0000002769 Tracking Number: 2111610000	4/7/2018	Assigned	Reassign	


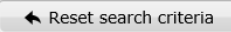










Click the history icon on the search results page. The Task Assignment History shows when the task was assigned or reassigned and to whom.

[Home](#) > [Dashboard](#) > [Advanced Assignments Search](#) > Task Assignment History

Task Details			
Task/Message Task		Source Wiscrs - Licensing	
Task Created Date 04/06/2018		Due Date 04/07/2018	
Tracking# 2111610000			
Task Assignment History			
Priority	Assigned User	Status	Updated Date
High	Pirkko Occ User	Assigned	04/06/2018
High	Charlotte Cbusupervisor	Assigned	04/06/2018

## Advanced Inbox Search

The advanced search allows staff to search the Inbox for tasks/messages for an agency.

Advanced Inbox Search	
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	 To 
Tracking Number	<input type="text" value="Enter 10 Digit ID"/>
Task Related To	

Below are descriptions for each field on this page.

Field Name	Description
Task/Message	Choose Task or Message
Source	<p>The source systems that create tasks/message are listed in the pull-down menu. The <b>WISCCRS</b> options are:</p> <ol style="list-style-type: none"> <li>1. WISCCRS – Licensing</li> <li>2. WISCCRS – Certification</li> </ol> <p>Note that the list includes values for other Childcare Systems but those tasks cannot be viewed in WISCCRS.</p>
Admin Unit	This value is defaulted to County. At a later date, Region may be added.
County	All Counties is set as the default value.
Assigned User Role	<p>CBU Supervisor is set as the default value. The Dashboard currently has the following roles:</p> <ul style="list-style-type: none"> <li>• CBU Supervisor:</li> <li>• CBU – Licensing:</li> <li>• CBU – Certification: This value is not currently used.</li> <li>• Certification: Choose this to filter all certification messages</li> <li>• Licensing: Choose this to filter all licensing messages.</li> </ul>

Field Name	Description
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 (automatically displayed for assigned tasks (CBU only))</li> <li>• Cancelled</li> <li>• In Progress</li> <li>• Pending</li> <li>• Processed</li> </ul>
Type	Check All has been added to the list. If this value is chosen, all task types are included in the search. Also, multiple values can be chosen.
Task Created Date	You can search the tasks by the Created Date range. The dates are set for 30 days back from the current date, but the dates can be modified. To search tasks without a time frame, delete both dates.
Due Dates	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. To display all tasks/message with a certain due date, leave all fields blank and just enter the due date.
Tracking Number	When a task is generated, the system assigns a unique number for the task.
Task Related to	<p>You can search using the following numbers:</p> <ul style="list-style-type: none"> <li>• Applicant/Location (Use this if you want to filter all tasks for a facility).</li> <li>• Individual</li> <li>• Provider/Location (Searching by provider number does not bring tasks in WISCCRS).</li> </ul>
Provider/Applicant/Individual Number	Once the value above has been chosen, enter the number here.

## 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 to have the search reset.

## Processing Tasks

Below are steps to complete the task.

1. Click the Task Description link of the task.





 WISCCRS - Licensing	04/06/2018	High	County: Dodge Role: Clu - Licensing	<a href="#">Individual Background Check - Licensing</a> Applicant Number: 6800075167 Location Number: 001 Individual Id Number: 0000002764 Tracking Number: 2501610000	04/07/2018	Pending	<a href="#">Assign</a>	 
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2. Complete the steps required by the task.
3. Once complete, mark the task Processed. The processed task will no longer be visible on the dashboard.

## DCF CBU Supervisor

Certain CBU 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						
<input checked="" type="checkbox"/> Pending <input type="checkbox"/> In Progress <input type="checkbox"/> Assigned						
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> <a href="#">Applicant Number: 800074701</a> <a href="#">Location Number: 001</a> <a href="#">Individual Id Number: 0000000255</a>	Pending	<a href="#">Assign</a>  
WISCCRS - Licensing	04/18/2018	High	County: Milwaukee Role: Cbu - Licensing	<a href="#">Individual Background Check - Licensing</a> <a href="#">Applicant Number: 2800011327</a> <a href="#">Location Number: 001</a> <a href="#">Individual Id Number: 0000000122</a>	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	<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</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	<p>The location county for the childcare provider is displayed here.</p> <p>The Dashboard currently has the following roles:</p> <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	<p>Below is a list of values for this field:</p> <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 Only

CBU supervisors 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 of the task.

Task Inbox						
<input checked="" type="checkbox"/> Pending <input type="checkbox"/> In Progress <input type="checkbox"/> Assigned						
Source	Created Date	Priority	Assigned Admin Unit/Role	Task Description	Task Status	
WISCCRS - Licensing	03/29/2019	7-Low	County: Milwaukee Role: Cbu - Supervisor	<a href="#">Role Change Request</a> <a href="#">Facility Name: Papa Murphy</a> <a href="#">Individual Name: Ellen Johnson</a>	Pending	<a href="#">Assign</a>  

The following screen displays.

Assign Task	
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
	<input type="checkbox"/> Assign To Different Role
Assign To *	<input type="text"/>
Priority *	7-Low
Comments	<input type="text"/>

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 <b>a different role</b> , 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 pull-down menu.
Assigned Priority	Values are: High, Medium, and Low.
Comments	Comments can be entered for the task.

## Multi-Assignments – CBU Supervisor only

Users with CBU Supervisor role 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.

**Advanced Assignment Search**

Source \* Wisccrs - Licensing

Admin Unit County

County All Counties

Assigned User Role Cbu - Licensing

Assigned User Ben Backgroundchecker

Status All Items checked

Type All items checked

Task Created Date [ ] To [ ]

Due Date [ ] To [ ]

Tracking Number Enter 10 Digit ID

Task Related To [ ]

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.

**Task Assignments**

Role/Admin Unit Cbu - Licensing Reassign To Pirkko-Cbu Mollaner Assign >

Assignment Tasks 1 to 63 of 63 records found

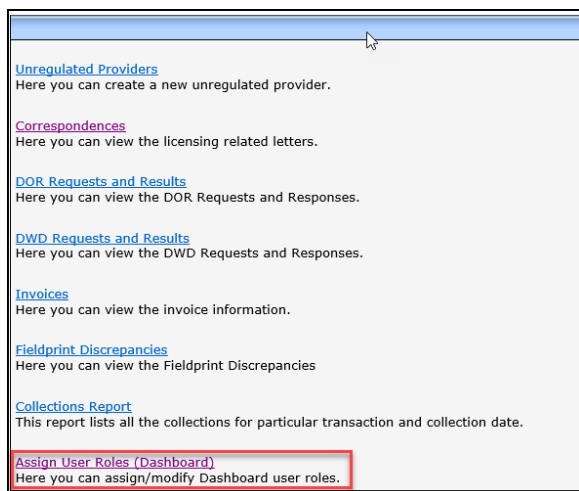
<input type="checkbox"/> Check All	Source	Assigned Date	Priority	Assigned User	Task Description	Status
<input type="checkbox"/>	WISCCRS - Licensing	3/28/2019	4-Medium	Ben Backgroundchecker	New Individual With No Record Found Facility Name: Pending Cert Individual Name: Tammy Teacher Status: Application Pending	In Progress <a href="#">Reassign</a>
<input type="checkbox"/>	WISCCRS - Licensing	3/28/2019	4-Medium	Ben Backgroundchecker	New Individual With No Record Found Facility Name: Pending Care Third Location Sero Individual Name: Hans Householdmember Status: Application Pending	Assigned <a href="#">Reassign</a>

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

## Assign User Roles - Dashboard

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

Currently, all DCF Central Office Staff are able to assign roles. To access the Assign User Role module, click the Administration link on the WISCCRS Home page and choose Assign User Roles (Dashboard) link on the bottom of the page.



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

Assign Roles For Users	
Domain Type *	Wiscrcs - 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:

1. Choose WISCCRS – Certification or WISCCRS - Licensing as the Domain Type.
2. Choose County as the Administrative Unit Type.
3. Choose the county/tribe from the list as the Administrative Unit.



## 4. Select the User Role.

The results for the above search show all users who have update access to Dodge County (licensing update profile). The users on the two top rows highlighted blue (see screenshot below) have already been assigned the CBU – Licensing 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 member.

Home > Administration > Assign User Role

**Assign Role For Users**

Domain Type \* Wiscrs - Licensing

Administrative Unit Type \* County

Administrative Unit \* Dodge

User Role \* CBU - Licensing ☐ Show Only Users For This Role

User

Search >

	First Name	Last Name	User Name	Begin Date	End Date
<input type="checkbox"/>	Pinko	Mollanen	dodgeworker	12/01/2011	
<input checked="" type="checkbox"/>	Pinko-Cbu	Mollanen	PRBKOCCBU	03/26/2018	
<input type="checkbox"/>	Deloitte	Occ	DeloitteOCC	10/29/2004	
<input type="checkbox"/>	Dileepkumar	Kamath	kamathOCC	09/08/2004	

5. To see who in the agency already has CBU-Licensing 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. If you are checking a role for a specific user, you can search for the person in the User pull-down menu.

6. To add the role, click Apply button on the bottom of the page.

To remove the Dashboard update role for a user, search for the user and uncheck the check 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.

## Call Center Inbox

Child care programs can now submit a request to have their website address (URL) to be posted on the Childcare Finder. These requests are entered in CCP and create tasks in WISCCRS (**BOP Team** - Call Center Inbox) in the Dashboard. DCF staff validates and approves the URL and that there are no concerns with the site. Once approved, the URL is sent to the Childcare Finder overnight.

The call center staff who monitor the Call Center Inbox (**BOP Team**) must have Call Center (**BOP Team**) profile attached to their WISCCRS User ID and also have all counties attached.

To access the Inbox, select Dashboard. The Inbox shows all website requests submitted by providers.

Note: During the approval process, make sure the websites are only advertising the providers childcare business and not their Pampered Chef or Mary Kay businesses, for example. The approval functionality is explained in the [Basics](#) user guide.

## WISCCRS User Guide – Dashboard

The status of the request is now Processed.

Provider Approved Website Address	
Provider Website	<a href="https://www.abc.com">https://www.abc.com</a>
Updated Date	12/09/2021

Provider Reported Website Address	
Source	Provider Portal
Provider Website	<a href="https://www.abc.com">https://www.abc.com</a>
Status	Processed

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

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

After the URL has been approved (or denied), access the Dashboard again to mark the Task Processed. First choose the Modify button.

Source	Created Date	Priority	Assigned Admin Unit/Role	Task Description	Task Status	
Provider Portal	12/09/2021	High	County: Milwaukee Role: Call Center	<a href="#">Provider Website Address Updated</a> <a href="#">Facility Name: Certified Dream Kids Place</a>	Pending	<a href="#">Assign</a>

Then change the status.

Modify Task	
Task/Message	Task
Task/Message Description	Provider Website Address Updated Facility Name: Certified Dream Kids Place
Tracking#	2208530000
Task Created Date	12/09/2021
Due Date	12/10/2021
Task Assigned User Role	Call Center
Assign To	N/A
Priority	High
Status	Processed
Comments	