

# Act 151 and Act 34 Tutorial Guide

## Background Check Clearances

**Please refer to the notes below for detailed instructions of each step.**



Down here! This is where detailed instructions of the steps will appear for each slide. If you would like to make this section larger, click and drag the three grey dots above this text box upwards.

# Step 1 - Creating an Item

COMPLY

BY EDULINK

Menu

Supervision Management

All Items

0 Pending Verification

0 Expires Soon

0 Expired

My Supervision Items

All Users' Progress

Templates

Add Item

My Compliance Items

User Management

Group Management

Questionnaire Management

Reporting

Portal Management

Central Admin

Example School Portal

[Support](#) | [Messages](#) | [Logout](#)

Compliance Items

Add Item

Select Tag

Template

Search

Q

Status 0

Complete 0

Pending 0

Compliance Item Name 0

Act 48 0

Start Date 0

End Date 0

Actions

0

0/0

Template

Acceptable Use Policy Template

08/01/2017

08/31/2017

View

0

0/0

Template

Acknowledgment and/or Sign-Off Item Template

08/15/2018

08/31/2018

View

0

0/0

Template

Act 114 Federal Criminal History Background Check Clearance

—

—

View

0

0/0

Template

Act 151 PA Child Abuse Background Check Clearance

—

—

View

0

0/0

Template

Act 34 PA Criminal History Background Check Clearance

—

—

View

0

0/0

Template

Act 44 - Emergency Drills Template

12/01/2018

12/30/2018

View

0

0/0

Template

Act 48 Item (Physical Sign-In and PD Feedback Form) Template

08/20/2018

08/20/2018

View

0

0/0

Template

Act 48 Item (Submission of Previously Earned Hours) Template

09/01/2018

09/01/2018

View

0

0/0

Template

Antihazing Law (PDE Required) Template

07/01/2018

06/30/2019

View

0

0/0

Template

Board Policy Review Template

08/01/2017

08/31/2017

View

0

0/0

Template

Bullying Prevention (Practice Item) Template

12/01/2018

12/01/2018

View

0

0/0

Template

Bullying Prevention Policy (PDE Required) Template

—

—

View

From the Item Templates page...

1. Select View next to the item labeled "Act 151 PA Child Abuse Background Check Clearance"





The screenshot shows the 'Edit Compliance Item' form. On the left is a sidebar with navigation links: 'My Compliance Items', 'User Management', 'Group Management', 'Questionnaire Management', 'Reporting', and 'Portal Management'. The main form area is divided into sections: 'Compliance Cycle Type', 'User Timeline', 'Instructions', 'Owner', 'Person of Contact', and 'What is required of the user?'. The 'Instructions' section contains three steps. Step 2 includes a red box around the text 'insert name here' with a red callout '1'. The 'Add User(s)' pop-up is open on the right, showing a search bar with 'central' entered (callout '3'), a list of results (callout '5'), and a 'Search' button (callout '4'). The 'Roster Preview' on the right shows a table with one entry: 'Central Admin (dmyers001-centraladmin@gmail.com)' (callout '6'). A green 'Save Roster' button is at the top right of the pop-up (callout '7'). A blue callout '2' points to the '+ Add Person' button in the 'Person of Contact' section.

Within the Instructions section...

1. Type the name of person to collect hard copies of the results

From the Person of Contact section...

1. Select +Add Person

From the Add Users pop up menu...

1. Search for the name of the person you would like to add as the Person of Contact
2. Select the green Search button or hit the Return key on your keyboard
3. Select the appropriate name from the Results column
4. Check that the name appears in the Roster Preview column
5. Select Save Roster

Central Admin

Example School Portal

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User Management

Group Management

Questionnaire Management

Reporting

Portal Management

Edit Compliance Item

Draft

Close

Publish

Save

Title: \*

Act 151 PA Child Abuse Background Check Clearance

Description: \*

Required background check for all employees who work in direct contact with children

Compliance Cycle Type: \*

User Timeline

Start Date

End Date

Instructions: \*

B

I

U

S

x<sub>2</sub>

x<sup>2</sup>

T<sub>1</sub>

Important Notes:

- Once your submission is reviewed and approved, you will receive an email that the current five year cycle is completed. The next day, the system will automatically generate a new five year cycle and send you an email with the new due date, indicating when this item will need to be completed again in the future.
- The district makes best effort to track clearance due dates for employees. Ultimately, the responsibility of completing/renewing clearances rests solely on each individual employee for all required clearances.

Make Private

off

On Not visible to other supervisors.

Reminders

(5) reminders

Questionnaire

Act 151 PA Child Abuse Background Check Clearance Template Copy

Resources

(2) resources

Recurrence

1

Recurs every 5 year(s)

Approval Stages

No approval stages currently exist.

Which supervisor(s) are responsible for approving this compliance item?

2

+ Add Supervisor Stage of Approval and related Supervisor(s)

Tags

Act 48

Scroll up on the Edit Compliance Item page...

1. Select Approval Stages
2. Select +Add Supervisor Stage of Approval and Related Supervisor(s)



**COMPLY BY EDULINK**

**Central Admin**  
Example School Portal  
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**Edit Compliance Item** [Draft] [Close] [Publish] [Save]

**Supervision Management**

- All Items
- Pending Verification
- Expires Soon
- Expired
- My Supervision Items
- All Users' Progress

**Title:** \*  
Act 151 PA Child Abuse Background Check Clearance

**Description:** \*  
Required background check for all employees who work in direct contact with children

**Make Private**  
or ☐ On Not visible to other supervisors.

**Reminders** (5) reminders

**Questionnaire** Act 151 PA Child Abuse Background Check Clearance Template Copy

**Resources** (2) resources

**Recurrence** Recurs every 5 year(s)

**Approval Stages** (1) approval stages

Which supervisor(s) are responsible for approving this compliance item?

**Name/Position** 1  
Central Office |

**Approvers** 2  
+ Add Approver

+ Add Supervisor Stage of Approval and related Supervisor(s)

**Tags**  
Act 48

**Add User(s)**

**Search** 3  
Search for User(s)  
central

**Results**  
Search within Results:  
Enter a name or email address here

**Roster Preview** 7  
The following users will be added to the roster:  
Central Admin (dmyers001+centraladmin@gmail.com) 6  
Remove All

There are currently no users for the selected criteria. 5  
Add

4  
Cancel Get All Users Search

Within the Approval Stages section...

1. Type Central Office for Name/Position
2. Select +Add Approver

From the Add User Pop Up menu...

1. Search for the name of the person you would like to add as the Approver
2. Select the green Search button or hit the Return key on your keyboard
3. Select the appropriate name from the Results column
4. Check that the name appears in the Roster Preview column
5. Select Save Roster

**COMPLY BY EDULINK**

**Central Admin**  
Example School Portal

Support Issues

**Edit Compliance Item**

**Title:** \*  
Act 151 PA Child Abuse Background Check Clearance

**Description:** \*  
Required background check for all employees who work in direct contact with children

**Compliance Cycle Type:** \*  
User Timeline

**Start Date** **End Date**

**Instructions:** \*

**Important Notes:**

- Once your submission is reviewed and approved, you will receive an email that the current five year cycle is completed. The next day, the system will automatically generate a new five year cycle and send you an email with the new due date, indicating when this item will need to be completed again in the future.
- The district makes best effort to track clearance due dates for employees. Ultimately, the responsibility of completing/renewing clearances rests solely on each individual employee for all required clearances.

**Make Private**  
on ☐ On Not visible to other supervisors.

**Reminders** (5) reminders

**Questionnaire** Act 151 PA Child Abuse Background Check Clearance Template Copy

**Resources** (2) resources

**Recurrence** Recurs every 5 year(s)

**Approval Stages** (1) approval stages

**Tags** (1) tags

Act 48

**Buttons:** Draft, Close, Publish, Save

From the Edit Compliance Item page...

1. Select the green Save button
2. Select the blue Publish button
3. Select the white Close button

This will publish the item and take you to the item's detail page where you can add users to the roster.

User Management

Group Management

1

Questionnaire Management

Reporting

Portal Management

Act 151 PA Child Abuse Background Check Clearance

PublishedActions

the results to [insert name here] in Central Office.

Step 3 - Click on the blue Complete Questionnaire button to acknowledge that you have completed the clearance requirement and sent a hard copy of your results.

Step 3 - Click the green Submit for Approval button. Once the hard copy of your results are received and reviewed, this item will be approved and you will receive an email.

Important Notes:

Once your submission is reviewed and approved, you will receive an email that the current five year cycle is completed. The next day, the system will automatically generate a new five year cycle and send you an email with the new due date, indicating when this item will need to be completed again in the future.

The district makes best effort to track clearance due dates for employees. Ultimately, the responsibility of completing/renewing clearances rests solely on each individual employee for all required clearances.

Resource Links

<https://www.compass.state.pa.us/cwis/public/home>

<https://www.compass.state.pa.us/CWIS/Public/FAQ>

Documents

-

Questionnaire Preview

Act 151 PA Child Abuse Background Check Clearance Template Copy

Roster

No user cycles currently in the roster.

Approve

Reopen

Modify Due Date

Nudge

Message

Remove

25

Before adding users to the roster, access the questionnaire and make any changes.

1. Select Questionnaire Management

User Management	Published	Acknowledgment and Electronic Signature	EduLink Admin	07/02/2018	Actions
Group Management	Published	Act 114 Federal Criminal History Background Check	Central Admin	02/18/2019	Actions
Questionnaire Management	Published	Act 114 Federal Criminal History Background Check (UEID Number Submission)	EduLink Admin	12/14/2017	Actions
Templates	Published	Act 114 Federal Criminal History Background Check (UEID Number Submission)	Admin User	05/16/2018	Actions
Reporting	Published	Act 151 PA Child Abuse Background Check Clearance	EduLink Admin	02/22/2018	Actions
Portal Management	Published	Act 151 PA Child Abuse Background Check Clearance Template Copy	Central Admin	02/21/2019	Actions
	Published	Act 34 PA Criminal History Background Check Clearance	EduLink Admin	03/13/2018	Create
	Published	Act 44 - Emergency Drills	EduLink Admin	11/21/2018	Edit
	Published	Act 44 - Emergency Plan Review Acknowledgment and Electronic Signature	EduLink Admin	11/21/2018	Duplicate
	Published	Alcohol, Chemical and Tobacco Abuse Program Training Acknowledgement	EduLink Admin	01/29/2018	Archive
	Published	Antihazing Law - Policy Acknowledgement	EduLink Admin	01/22/2018	Preview
	Published	Board Policy Review Acknowledgement and Electronic Signature	Admin User	10/29/2017	Actions
	Published	Bullying Prevention - Policy Acknowledgement	EduLink Admin	01/22/2018	Actions
	Published	Child Abuse Recognition and Reporting - Policy and Training Acknowledgement	EduLink Admin	12/21/2017	Actions

From the Questionnaire Management page...

1. Select Actions next to the questionnaire labeled "Act 151 PA Child Abuse Background Check Clearance Template Copy"
2. Select Edit from the dropdown menu

Note: Make sure that the questionnaire you select is the one that was duplicated/created by you (see Created by column)

**COMPLY BY EDULINK**

**Central Admin**  
Example School Portal  
Messages | Logout

Close Save Preview Un-publish

**Edit Questionnaire**

Form Title\*  
Act 151 PA Child Abuse Background Check Clearance Template

Description\*  
Employee electronic signature with acknowledgement

**To begin:**

1. Add (grab and drop) the Section item from the panel on the right to the gray panel below. Name the section as appropriate.
2. If you want directions included on your questionnaire, add a Label/Instruction item. Rename the label and enter directions as appropriate.
3. Add questions as needed (Singleline Text, Multiline Text, Multiple Choice, Drop Down, and/or Check-Box.) You can add as many questions as you want or duplicate questions as you go. You can even add additional sections.
4. Save your work frequently. Click Preview to view your progress, and Publish (make the form active) when ready.

**Signature** Display Title ☒

**Acknowledgement**

I have submitted the results of my Act 151 PA Child Abuse Background Check.

**H Name**

Type full name here

Required ☒

**Add**

- Section
- Label/Instructions
- A Singleline Text
- Multiline Text
- Multiple Choice
- Checkboxes
- Dropdown
- Signature

From the Edit Questionnaire page...

1. Edit the title as needed (remove template copy)
2. Review the information in the questionnaire and edit as needed
3. Select Save and Preview (if desired)
4. Select Close to exit the edit screen

Central Admin

Example School Portal

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View All Questionnaires

Add Questionnaire

Active

Q

Status	Title	Created By	Last Modified	Actions
Published	Acceptable Use Policy Signature	EduLink Admin	04/09/2018	Actions
Published	Acknowledgment and Electronic Signature	EduLink Admin	07/02/2018	Actions
Published	Act 114 Federal Criminal History Background Check	Central Admin	02/18/2019	Actions
Published	Act 114 Federal Criminal History Background Check (UEID Number Submission)	EduLink Admin	12/14/2017	Actions
Published	Act 114 Federal Criminal History Background Check (UEID Number Submission)	Admin User	05/16/2018	Actions
Published	Act 151 PA Child Abuse Background Check Clearance	EduLink Admin	02/22/2018	Actions
Published	Act 151 PA Child Abuse Background Check Clearance	Central Admin	02/21/2019	Actions
Published	Act 34 PA Criminal History Background Check Clearance	EduLink Admin	03/13/2018	Actions
Published	Act 44 - Emergency Drills	EduLink Admin	11/21/2018	Actions
Published	Act 44 - Emergency Plan Review Acknowledgment and Electronic Signature	EduLink Admin	11/21/2018	Actions
Published	Alcohol, Chemical and Tobacco Abuse Program Training Acknowledgement	EduLink Admin	01/29/2018	Actions

Now the the questionnaire has been edited, navigate your way back to the Act 151 compliance item. From the View All Questionnaires page...

1. Select Supervision Management form the navigational menu
2. Select My Supervision Items

Central Admin

Example School Portal

Support | Messages | Logout

Menu

Supervision Management

All Items

My Supervision Items

2 Pending Verification

1 Expires Soon

1 Expired

All Users' Progress

Templates

Add Item

My Compliance Items

User Management

Group Management

Questionnaire Management

Reporting

Portal Management

My Supervision Items

Add Item

Select Tag

Active

Search

Status	Complete	Pending	Compliance Item Name	Act 48	Start Date	End Date	Actions
	2/2	0 Pending	Published 2019-01-21 Reading Assessment		01/21/2019	01/21/2019	<a href="#">View</a>
	1/47	46 Pending	Published 2019-2-15 School Safety Training		02/15/2019	02/22/2019	<a href="#">View</a>
	0/19	0 Pending	Published Act 114 Federal Criminal History Background Check Clearance	—	—	—	<a href="#">View</a>
	0/0	0 Pending	Published Act 151 PA Child Abuse Background Check Clearance	—	—	—	<a href="#">View</a>
	16/19	2 Pending	Published Act 48 Item (Physical Sign-in and Feedback Form)		08/01/2018	08/31/2018	<a href="#">View</a>
	3/46	0 Pending	Published Health Benefit Notice		02/19/2019	02/28/2019	<a href="#">View</a>
	0/54	0 Pending	Published Wilson SD Emergency Contact Info		08/19/2019	09/05/2019	<a href="#">View</a>

From My Supervision Items page...

1. Select View next to the item labeled “Act 151 PA Child Abuse Background Check Clearance”

# Step 2 - Adding Users

Step 2 - Adding Users to a compliance item once it has been published.





	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	tony@edulinkinc.com	7/10/14												
2	kristi@edulinkinc.com	3/4/14												
3	jada@edulinkinc.com	3/12/14												
4	joel@edulinkinc.com	4/2/14												
5	rob@edulinkinc.com	5/1/14												
6	judy@edulinkinc.com	8/18/14												
7	john@edulinkinc.com	10/10/14												
8	robert@edulinkinc.com	2/21/15												
9	tina@edulinkinc.com	3/30/15												
10	bob@edulinkinc.com	4/24/15												
11	chrisb@edulinkinc.com	7/5/15												
12	jodi@edulinkinc.com	8/9/15												
13	marty@edulinkinc.com	12/9/15												
14	ryan@edulinkinc.com	3/15/16												
15	jay@edulinkinc.com	5/20/16												
16	alice@edulinkinc.com	7/30/16												
17	amya@edulinkinc.com	2/7/17												
18	ed@edulinkinc.com	3/27/17												
19	abby@edulinkinc.com	11/5/18												
20	mary@edulinkinc.com	8/2/18												
21														
22														
23														
24														
25														
26														
27														
28														

The CSV file you upload should look similar to this...

1. Ensure that you have 2 columns with no headers
  - First column - email address of user
  - Second column - the date the individual last completed the clearance

Note: You must save this as a CSV file in order for COMPLY to accept it.

### Bulk Add Users

**Directions:** To bulk add users and dates to this compliance item, upload a CSV file.

**Example User Upload File** - Use this example CSV file to bulk upload users to this item. The example file has three columns (email address, start date, and due date). Email address of user is required and either the start date or due date is required. The CSV file should not include any headers.

**Important Note Regarding Clearances** - For clearance items with five year recurrence, it is recommended that your CSV file have only two columns of data. The first column should be the email address of the user. The second column should be the start date (i.e., the date the individual last completed their clearance). Leave the third column blank. When uploaded, the system will count out five years and set a new due date. Note - Start dates for individual users that are older than five years will not be accepted. For these types of users (where the start date you have on record is older than five years), it is recommend that you identify a more current date.

Select document

Choose File

Act 151 clearance upload example

1

2

Upload File / Add Users

Close

Published

Actions

ou have

results are

all that the

natically

date, indicating

s. Ultimately,

h individual

Upload Users

25

Once you have selected the CSV file...

1. Select the green Upload File/ Add Users button
2. Select the white Close button to exit

When you complete this step, all the users you have added will receive an email notifying them that they are responsible for completing this item. You will also receive an email with a summary of your upload. From the email you receive, check the processing details to ensure that all users were added successfully.

# Step 3 - Approving Users

Step 3 - Approving Users once they have completed their compliance item and submitted it for approval

Action \*  
 Approved

Completed Date: \*  
 February 4, 2019

Set Line: \*  
☒ Use the above completed date as the start date for the next cycle.  
☐ Use the original due date 03/11/2019 as the start date for the next cycle.

**Important Note Regarding Clearances** - When approving clearance items with five year cycles (e.g. Act 114, Act 151, and Act 34), enter the date the individual completed the clearance as shown on their official results in the Completed Date field and check the box next to "Use the above completed date as the start date for the next cycle". Once approved, the user will receive an email that the current five year cycle is completed. The next day, the system will automatically generate a new five year cycle and email the individual with the new due date when the item will need to be completed again.

Ok Cancel

Date	Completed	History	Evidence	Notes	Actions
/11/2019					Approve
/06/2022					Actions
/19/2021					Actions
08/08/2020					Actions
10/09/2019					Actions
07/09/2023					Actions
11/04/2023					Actions

Once you receive a hard copy of the background check and assuming there are no issues with the background check, it is now time to Approve the user and establish the next five year cycle...

1. From the Roster section of the item, select Approve

From the Approval pop-up screen...

1. Select the calendar icon to edit the Completed Date. Note - This date should be the date that the user officially completed their clearance (as indicated on their official Act 151 clearance record).
2. Select the check box next to "Use the above completed date as the start date for the next cycle."
3. Select Ok

# Tips for Troubleshooting Clearance Items

**Please review the Act 151 video tutorial for tips on troubleshooting this clearance item.**

**Troubleshooting tips include what to do if...**

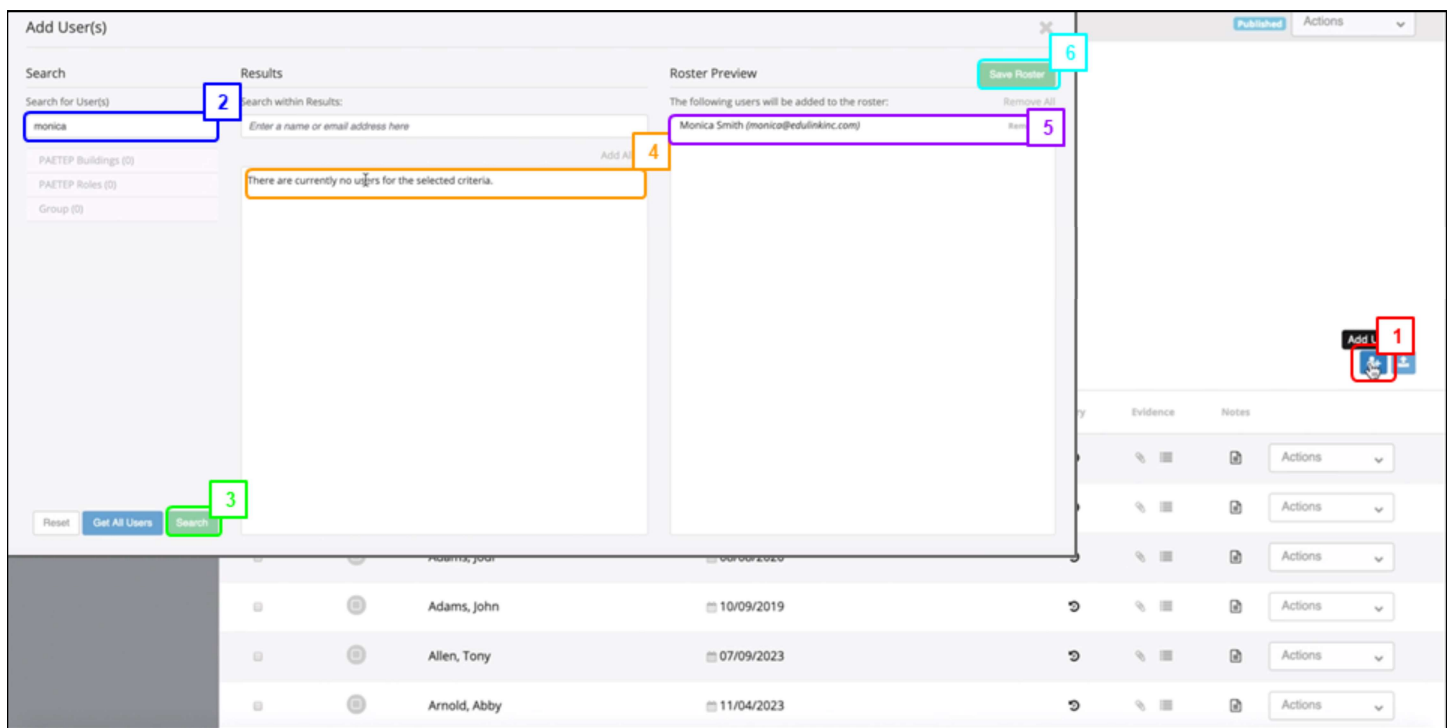
- 1) User submits something incorrectly or too early (well before their due date)**
- 2) User should not be on the roster and they need to be removed**
- 3) User has incorrect due date**

# Adding Users in the Future (new hires)

Once the initial upload of users has been completed, you will need to add new users (new hires) to this item in the future. There are two options for adding new users.

1. Add new users via a new CSV file
2. Add users manually

**Note -** The following slides show you how to add new users manually.



From the Roster section of the Item Details page...

1. Select the Add Users button
2. Type the name of the user in the search bar
3. Select Search
4. Select the user in the results column
5. Check that the user has been moved to the roster preview
6. Select Save Roster



**Modify Due Date**

June 3, 2019

Save & Close Cancel

**Child Abuse Background Check Clearance**

Individual	Clearance Date	Status	Actions
Banks, Ed	03/26/2022	Completed	Actions
Bay, Tina	03/29/2020	Completed	Actions
Bell, Marty	12/08/2020	Completed	Actions
Bennett, Chris	07/04/2020	Completed	Actions
Bing, Joel	04/01/2019	Completed	Actions
Bowman, Alice	07/29/2021	Completed	Actions
Butler, Kristi	03/03/2019	Completed	Actions
Cooper, Mary	08/01/2021	Completed	Actions
Crane, Rob	04/30/2019	Completed	Actions
Smith, Monica	[Need Due Date]	Needs Update	Actions
Clark, Jada	03/11/2019	Completed	Message, Nudge, Modify Due Date, Remove, Forgive

1. Click Actions for Monica Smith  
2. Click Modify Due Date  
3. Click Calendar icon  
4. Click Save & Close

To enter a Due Date...

1. Across from the user's name, select the Actions button
2. Select Modify Due Date
3. Select the Calendar Icon to change the due date. Note - the due date should be five years in the future from the date the individual last completed the clearance (as indicated on their official Act 151 clearance record).
4. Select Save & Close

# Act 34 - PA Criminal History Background Check Clearance

The Act 151 and Act 34 clearances are similar in terms of process. To build the Act 34 clearance item, use the Template called Act 34 - PA Criminal History Background Check Clearance and repeat all these steps.