COMPLY
BY EDULINK

Act 151 and Act 34 Tutorial Guide

Background Check Clearances

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.

From the Item Templates page...

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

From the Item Details page...

1. Select Actions
2. Select Duplicate (from the Actions button drop down menu)

From the Edit Compliance Item page...

1. Edit the title as needed (remove Template Copy)
2. Within the Instructions section
   - Remove the red text
   - Edit the rest of instructions as needed to meet the specific needs of your district

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

Scroll up on the Edit Compliance Item page...

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

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 <u>or</u> 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

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.

Act 151 PA Child Abuse Background Check Clearance

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

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)

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

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

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 to a compliance item once it has been published.

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 docume **2**

Choose File   no file chosen

Upload File / Add Users   Close

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

1. Select the blue Upload Users button

Carefully read the directions and create the necessary CSV file. Once the CSV file is created...

1. Select Choose File

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.

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Select document

Choose File | Act 151 clearance upload example

1 | Upload File / Add Users | **2** | Close

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 once they have completed their compliance item and submitted it for approval

Action *

Approved

Completed Date: *

February 4, 2019   **2**

3 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.

4 Ok   Cancel

			Completed	History	Evidence	Notes			
		/11/2019		↺	✎ ☰	🔖	Actions ⌄	Approve **1** ⌄	
		/06/2022		↺	✎ ☰	🔖	Actions ⌄		
		/19/2021		↺	✎ ☰	🔖	Actions ⌄		
☐	◉	Adams, Jodi	📅 08/08/2020	↺	✎ ☰	🔖	Actions ⌄		
☐	◉	Adams, John	📅 10/09/2019	↺	✎ ☰	🔖	Actions ⌄		
☐	◉	Allen, Tony	📅 07/09/2023	↺	✎ ☰	🔖	Actions ⌄		
☐	◉	Arnold, Abby	📅 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

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 to 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**

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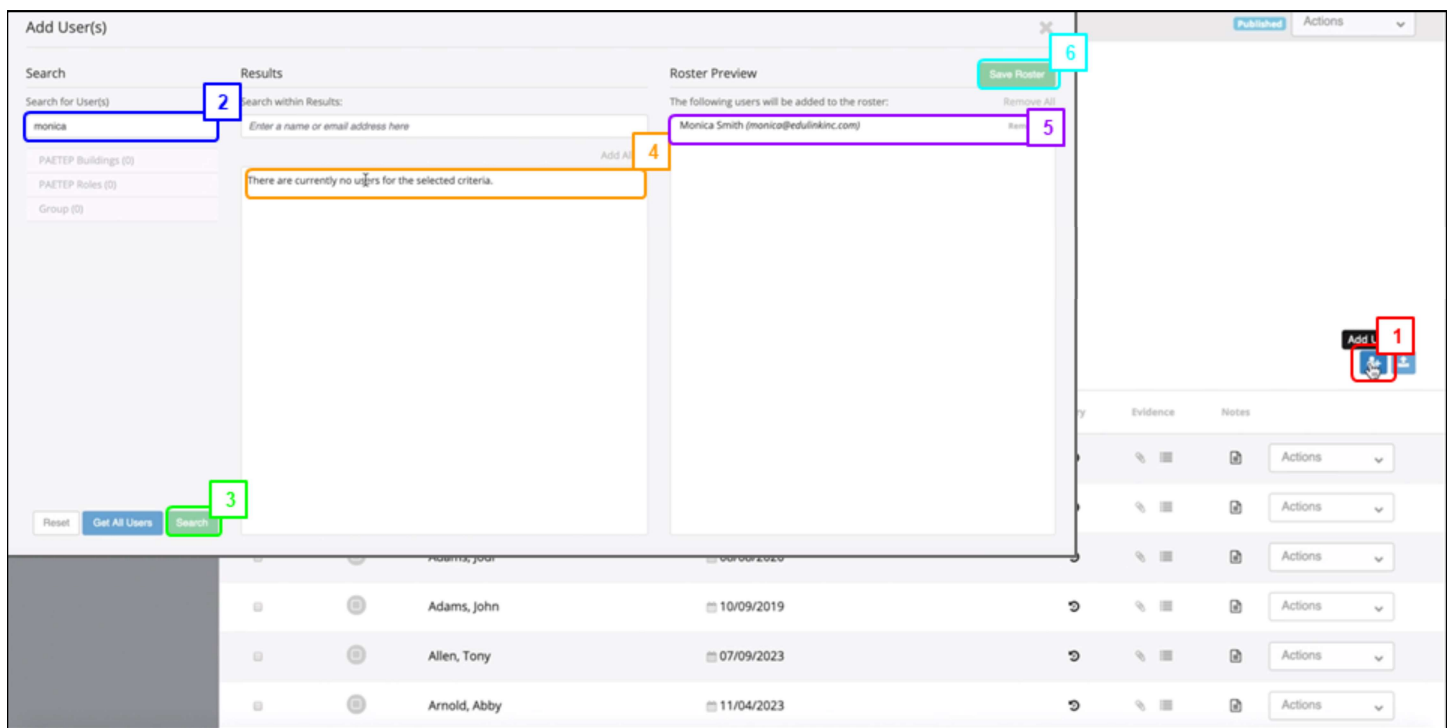
From the Roster section of the Item Details page...

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

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.