Background

The instructions in this document provide guidance to external organizations using CWIS to generate payment codes or fee-waived codes for child abuse history certifications. These business partners (BPs) can be agencies that are purchasing codes for employees or other non-volunteer purposes or fee-waived codes for tracking volunteers.

Organizations will have two types of users: business partner administrators (BP Admins) or non-administrator users (BP Users).

This document provides instructions on how to do the following:

- **Register a Business Partner Organization**
- **Register as a Business Partner Administrator/User**
- **Approve CWIS Access for Business Partner User** (for subsequent users from the organization who register with CWIS in order to generate payment codes)
- **Generate Payment or Fee-Waived Codes** (for child abuse certifications)
Register a Business Partner Organization

**Scenario:**
A user from an organization needs to register their organization with the Department of Human Services (DHS) in order to issue payment codes to employees or fee-waived codes to volunteers. The organization has not previously registered with DHS.
Register a Business Partner Organization: Step 1

- Navigate to the CWIS Child Welfare Portal
- OR
- Navigate to the following web address:
  - https://www.compass.state.pa.us/cwis
- Click the CREATE ORGANIZATION ACCOUNT link.
Register a Business Partner Organization: Step 2

• On the **General Information** screen, click **NEXT**.
Register a Business Partner Organization: Step 3

- On the **User Profile Information** screen, complete the required fields, then click **NEXT**.
On the Organization Information screen, enter the Organization Tax ID and Organization Name.

The screen will refresh. “Not Registered” will display in the Organization Registration Status field. (Note: This scenario assumes this organization is new to DHS; if you see “Registered” appear, confirm that the tax ID used belongs to your organization and then move to the “Register as a Business Partner Administrator/User” following scenario.)

Click the REGISTER ORGANIZATION button.
On the **Enterprise Business Partner Organization Profile** screen, complete the required information. Note that the **Organization Tax ID** is your organization’s tax ID or federal employer identification number (FEIN), then click **NEXT**.
• On the **Data Release Agreement** screen, read the agreement and select the radio button starting with “I have read and accept…”, and enter the full name (first last) in the **Full Name** field *(exactly the same as on the previous screen)*, then click **FINISH**.
Register a Business Partner Organization: Step 7

- On the **Congratulations!** screen, click the **CLOSE WINDOW** button.
Register a Business Partner Organization: Next Steps

- An email acknowledging the request will be sent to the user email provided in the Register Organization scenario steps.
- Once approved, an approval email will be sent to the user email used in the registration.
- You (or someone else) will now have to self register as a business partner administrator (see the following scenario).

SCENARIO COMPLETE
Register as a BP Admin/User

**Scenario:**
The organization is already registered with the Department of Human Services. A user from the organization desires to register as a business partner administrator or a business partner user (non-administrator).
Register as a BP Admin/User: Step 1

- Navigate to the **CWIS Child Welfare Portal**
  OR
- Enter the following URL in your browser: [https://www.compass.state.pa.us/cwis](https://www.compass.state.pa.us/cwis)
- Click the **CREATE ORGANIZATION ACCOUNT** link.
Register as a BP Admin/User: Step 2

- On the **General Information** screen, click **NEXT**.
Register as a BP Admin/User: Step 3

- On the **User Profile Information** screen, complete the required fields, then click **NEXT**.
On the **Organization Information** screen, enter the required fields, then click **NEXT**. *(Note: your organization must be registered with DHS or you will not be able to proceed.)*
Register as a BP Admin/User: Step 5

- On the **Organization Role** screen, click the appropriate radio button for the role you want and then click **NEXT**. *(Note: if you are the first user to register for an organization, you will be required to register as an administrator. Subsequent requests may select either option.)*
Register as a BP Admin/User: Step 6

- On the **Application Details** screen, enter a justification for your request for payment codes in the **Brief explanation** field: please be sure to specify either payment-waived or prepaid, then click **NEXT**. (Note: By law, only a very limited group of organizations (e.g., Big Brothers/Big Sisters, rape crisis centers, etc.) will be given the ability to issue payment-waived codes. The predominant majority of organizations will **ONLY** be able to issue prepaid codes to their members.)
On the User Release Agreement screen, read the agreement and select the “I have read and understand…” radio button. (Note: If you do not select this radio button, you will not be granted access).

Enter the full name (First Last) in the Full name field.

Click NEXT.
Register as a BP Admin/User: Step 8

- On the **Security Questions** screen, select three unique questions and answers. (Note: Be sure to pick answers that you will easily remember--you will need to remember these answers if you need to retrieve your user ID or reset/unlock your password. You must reset your password every 120 days or it will expire.)

- Click **FINISH**.
Register as a BP Admin/User: Step 9

- On the Congratulations screen, click CLOSE WINDOW.
You will receive an automated email notifying you that the Commonwealth has received your email request.

- The first user from your organization to register will be the business partner administrator (BP Admin). The approval of that request will be processed by OCYF.
  - Subsequent requests for administrative access will be processed by OCYF.
  - Subsequent requests for non-administrative access will be approved by your organization’s BP Admin(s).
- Once the request is approved, you will receive an auto-generated email notifying you of your b-dash user ID. It will be in the format (b-abcde). This is the ID you will need to use to login to the CWIS Organization login link in order to generate, assign and view payment codes.

SCENARIO COMPLETE
Approve CWIS Access for BP User

Scenario:
The organization business partner administrator needs to approve the CWIS access request received from a user (non-administrative) within their organization who has just registered via the Organization Account Access link on the Child Welfare portal.
Approve CWIS Access for BP User: Step 1

Once the user requests CWIS access, you (the business partner administrator) will receive an email notification.

- Open the email. You will see the name of the user who requested CWIS access.
- Click the link in the email
  OR
- Navigate to the following web address: https://www.hhsapps.state.pa.us/iam/im/businesspartners/ca12/index.jsp
Approve CWIS Access for BP User: Step 2

- On the **Keystone Key** screen, login to the security application with your BP Admin b-dash user ID and password.
Approve CWIS Access for BP User: Step 3

- If there are any open requests for you to process, the **Work List** screen on the **Business Partner Management** tab will display with the request(s). *(Note: in the example here, a user has submitted a CWIS access request)*
- Click the request hyperlink (circled below) to open it.
Approve CWIS Access for BP User: Step 4

- On the **Enterprise BP Admin and User Approval** screen, scroll down to the bottom of the screen and click the **APPROVE** button.
Approve CWIS Access for BP User: Step 5

- On the **Enterprise BP Admin and User Approval** screen, a task pending alert displays.
- Click **OK** to continue.
Approve CWIS Access for BP User: Next Steps

• New b-dash users will receive an email with their new b-dash user ID
• Existing b-dash users will receive an email notifying them of their new access.

SCENARIO COMPLETE
Generate Payment or Fee-Waived Codes

Scenario:
An organization’s business partner administrator (BP Admin) or non-administrative user (BP User) needs to login to CWIS to create codes for their organization, or assign codes, or view certification results of assigned codes.
Generate Payment Codes: Step 1

- On the CWIS Child Welfare Portal (https://www.compass.state.pa.us/cwis), click the Organization Login link.
- **Note:** this link is **ONLY** used to:
  - Register an organization or individual to be able to generate codes
  - Generate payment or fee-waived codes
  - View generated codes and results

The Organization Login link is **ONLY** for:
1) Registering organizations or users;
2) Generating codes, or
3) Assigning / viewing codes and results.
On the **Keystone Key** screen, enter your b-user ID, password, and click **LOGIN**.
Generate Payment Codes: Step 3

• From the **Organization Account Overview** screen, you will see available payment codes, to whom they have been assigned, and the certification result.
• To generate payment or fee-waived codes, click the **GENERATE PAYMENT CODES** button.

![Organization Account Overview](image_url)
On the **Generate Payment Codes** screen, select the type of codes to generate and enter the number of codes to generate. (Note: Fee-waived codes may only be generated for the purpose of volunteers)

Click **GENERATE PAYMENT CODES**
• Click the “Continue to use this website…” link (will only appear for prepaid codes)
• On the **Make a Payment** screen, complete the required information and click **PAY NOW**.
• Complete any remaining payment processing steps, such as printing the generated receipt (not shown).
Generate Payment Codes: Step 6

- Be sure to click the RETURN TO ORGANIZATION ACCOUNT OVERVIEW button—this is the actual confirmation that CWIS uses to generate your payment codes once you return from the payment screens. *(Note: This option is only for prepaid codes.)*
• Upon returning to the **Organization Account Overview** screen, you will see a success result displaying the payment codes, generation date, code type, and the name of the person who created them.
The purpose of generating payment codes is so that employees or other non-volunteers can use them to pay for a child abuse certification. Fee-waived codes may be used to provide access to organizations to track volunteer certifications.

To submit a clearance request using a code, an individual must first register for an individual account on the CWIS Child Welfare Portal by clicking the CREATE A NEW ACCOUNT button at the following link: (https://www.compass.state.pa.us/cwis)

Once they are registered, they will need to return to this page and click the LOGIN button to continue creating a child abuse certification request.
Once a code is used, you will be able to see who used the payment or fee-waived code, the date used, and the status of the certification application. Once the status changes to “Completed”, you will be able to click upon it to see the result by clicking on the hyperlink in the **Status** column.

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**Organization Account Overview**

This site allows you to generate, manage and track usage of your payment codes. To assist with tracking which payment clearance applicants, you can select the issued checkbox and click the Save button provided below.

*Ctrl + click* the column heading to sort by a second column. *Shift + click* to remove the second column from sorting.

<table>
<thead>
<tr>
<th>Payment Code</th>
<th>Generation Date</th>
<th>Code Type</th>
<th>Created By</th>
<th>Application ID</th>
<th>Used By</th>
<th>Date Used</th>
<th>Status</th>
<th>Issued</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1/8/2015</td>
<td>Fee-Waved</td>
<td></td>
<td>5752893</td>
<td></td>
<td>1/8/2015</td>
<td>Under Review</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1/8/2015</td>
<td>Fee-Waved</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SCENARIO COMPLETE**