

Background Check System (BCS) User Guide: Entity Administrator Functions

- About This Manual** 2

- Overview** 2
 - User Types and Statuses* 2
 - User Groups and Roles* 3

- Managing Users** 3
 - How to Add a New User* 4
 - How to Update a User* 7
 - Generate a New Registration Letter for a User* 8
 - How to Change the Primary Account Administrator* 9

- Managing Secondary Entities** 9
 - Purpose of Secondary Entities* 9
 - How to Add a New Secondary Entity* 9
 - How to Update a Secondary Entity* 11
 - Search and Close Secondary Entity* 12

About This Manual

Welcome to the Background Check System (BCS) User Manual. This manual is intended to serve as a guide as you perform Administrative functions in BCS.

Please note that the BCS system (and therefore this manual) is subject to alteration. Modifications/updates to the manual may result from changes in State or Federal policies and procedures, BCS system upgrades, or other factors.

BCS was developed for use by the Department of Social and Health Services (DSHS) Background Check Central Unit (BCCU). Use of BCS and this manual is restricted to authorized end users of BCS system. BCCU can be contacted at BCCUinquiry@dshs.wa.gov.

Overview

Users of the Background Check System (BCS) are invited to register in BCS. An Oversight Program Administrator or Entity Account Administrator may add or update user profiles and send registration invitations to authorized users.

All entities must have a Primary Account Administrator (PAA) identified before they can access BCS, submit, and retrieve background checks to BCCU. The PAA is responsible for adding other users to the entity account in BCS. This person may add additional Account Administrators who also may add new users to the account. The PAA is the main entity contact for the entity for BCCU.

BCS entity accounts can only be added by BCCU managers or authorized DSHS database information uploaded into BCS. Entity Users will be registered and activated by following a link generated and sent by BCS. New PAA's for entities may have to enter registration keys or temporary passwords, depending on their User Type (Internal User/External User). The user registration key is time sensitive as it is only valid for seven (7) days. After seven days, the registration key will expire and the user will be required to contact BCCU or the PAA to request a new registration key.

User Types and Statuses

A User Type is the way the user accesses BCS. BCS includes two user types: Internal and External.

1. **Internal Users** access BCS through the state's Active Directory (AD) and have a state issued email address (@dshs.wa.gov).
 - a. Please refer to your program contact to determine whether you need access to BCS.
2. **External Users** access BCS through SecureAccess Washington (SAW). Any BCS user who is not in the AD and outside the state firewall will access BCS through logging into SAW before getting into BCS.
 - a. For assistance logging into BCS, please refer to the [Logging into BCS using SecureAccess Washington SAW user guide](#).

BCS users have three types of statuses in the system. A user's Profile Status may be Enabled, Disabled, or Pending. A user's Entity Role Status may be Active or Inactive.

1. **Enabled** users may access BCS with any *Active* role.
2. **Disabled** users may not access BCS regardless of their role status. (If a user needs changed back to enabled the PAA will need to contact BCCU requesting this).
3. **Pending** users may only access the BCS Registration page to *enable* their profile and *activate* their roles.

User Groups and Roles

User roles in BCS are based on hierarchical structure. Different roles may be combined across multiple BCS accounts. When multiple roles or user groups are assigned, BCS will provide a person the ability to access all the functions within the both roles. For example, a user may have an Oversight user role and an Entity Account user role. The person will be able to access all the Oversight pages and the Entity pages within BCS. A user could also be the Account Administrator for one account and just a user on another account.

An entity Account Administrator may perform actions in BCS to manage the user's BCS account. Account administration includes:

- **Managing Users**
 - Entity Account User Roles Overview
 - How to Add a New User
 - How to Update a User
 - How to Change the PAA
- **Managing Secondary Entities**
 - Purpose of Secondary Entity
 - How to Create a Secondary Entity
 - How to Update a Secondary Entity

Managing Users

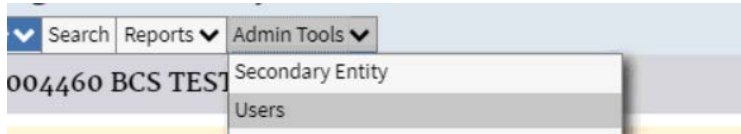
There are three types of entity account users:

1. **Account Administrator**
 - a. Account Administrators may manage any user assigned to their entity and also manage Secondary Entities. They can submit and retrieve background check results.
 - b. Note: For each entity, a single user must be assigned as the Primary Account Administrator (PAA). This person is responsible for the people who have access to their BCS account. The PAA may add other Account Administrators to manage the administrative functions of the BCS account.
2. **Account User**
 - a. Account Users can enter and submit background checks and retrieve background check results.
3. **Account Submitter**
 - a. Account Submitters can enter Background Check Authorization forms and submit to BCCU. They may not view the results of background checks.

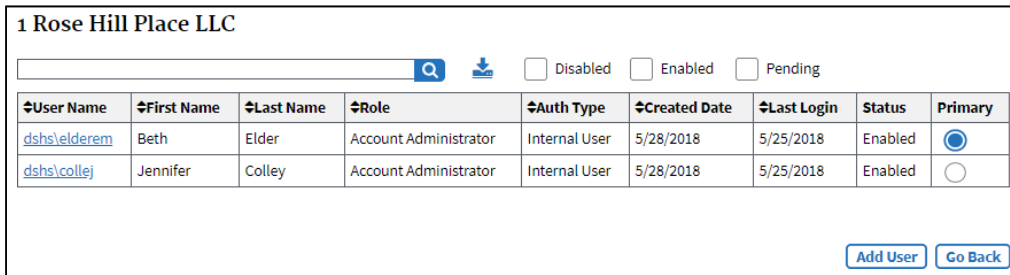
How to Add a New User

To add a new User:

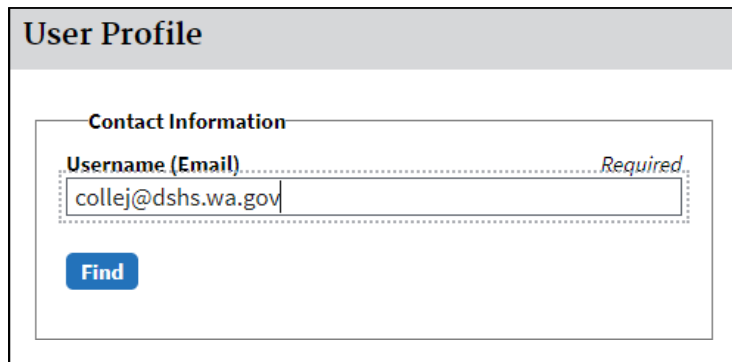
1. Click **Admin Tools**



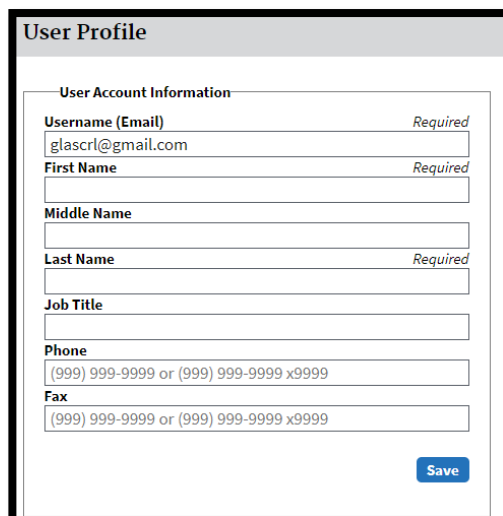
2. Click **Users**
 - a. Users page displays



3. Click **Add User**
 - a. User Profile page displays



4. Add new user email address and click **Find**, then add user account information and **Save**.



- 5. User profile is created and profile status should display as *Pending*. **You MUST now assign an Entity Role** (level of access) for the user.

The screenshot shows a web interface with two main sections. The top section is titled "User Account Information" and contains a form with the following fields: "Username (Email)" with the value "bcstest@gmail.com", "User Profile Status" with the value "Pending", "First Name" with the value "BCS", "Middle Name" (empty), "Last Name" with the value "Test", "Job Title" (empty), "Phone" with the value "(999) 999-9999 or (999) 999-9999 x9999", and "Fax" with the value "(999) 999-9999 or (999) 999-9999 x9999". A "Save" button is located at the bottom right of this form. The bottom section is titled "Entity Roles (0 Active) **User Profile Status: Pending**" and contains a search bar with a magnifying glass icon, the text "No Entity Roles found...", an "Add New" button, and a "Go Back" button at the bottom right.

- 6. Click **Add New** under **Entity Roles** based on the level of access you would like user to have. See page 3 for descriptions.

This is a close-up screenshot of the "Entity Roles" section from the previous image. It shows the header "Entity Roles (0 Active) **User Profile Status: Pending**", a search bar with a magnifying glass icon, the text "No Entity Roles found...", an "Add New" button, and a "Go Back" button at the bottom right.

- a. Fields display auto populated with Administration, Division, Inquiry Type, and Entity.

Entity Roles (0 Active)

No Entity Roles found...

[Add New](#)

Select administration *Required*
Aging & Long-Term Support Administration

Select division *Required*
Residential Care Services

Select inquiry type *Required*
Adult Family Home

Select entity *Required*
40010260: 1 Rose Hill Place LLC, Adult Family Home, Kirkland

Role *Required*
Account Administrator

[Save](#) [Cancel](#)

- 7. Select **Role**. See page 3 for definitions of Entity Roles.
- 8. Select **Save**
 - a. New account displays in a table with Account #, Entity Name, City, Role.

Entity Roles (0 Active; 1 Inactive) ****User Profile Status: Pending****

[Q](#)

[Download](#)

Account #	Entity Name	City	Role	Status	Registration Code
40010708	1st Merrill Creek Pkwy Senior Care Home LLC	Everett	Account Administrator	Inactive	49SUNW

[Add New](#) [Generate Registration Letter](#)

[Go Back](#)

- b. Status is Inactive for SAW users or Active for AD users until they login for the first time.
- c. The BCS Registration Letter is sent automatically to the new users email address within 20 minutes of being added to BCS.
- 9. Click **Add New** to add another user.
- 10. Click **Go Back** button twice
 - a. User page displays and is reset.

How to Update a User

Update User Contact Information:

1. Click **Admin Tools** menu.
2. Click **Users**.
 - a. Users page displays.
3. Click the Username of the user you wish to edit.
 - a. User’s Profile displays.
4. Update the User’s Name or contact information.
5. Click **Save**.
 - a. Message: Successfully saved.

Change User Access for Account:

1. Search and open the user’s profile.
2. Find the role you wish to update.
3. Click the link for **Active** or **Inactive**.
 - a. Message: Are you sure you want to change this user’s status...?
 - b. Click Cancel Message disappears and user’s role doesn’t change.
 - c. Click **OK** User’s status is changed to **Inactive**.
 - **Inactive** = Account Access Disabled
 - **Active** = Account Access Enabled

Account #	Entity Name	City	Role	Status
11001144	BCCU	OLYMPIA	Account Administrator	Inactive

- d. The User is no longer an active user on this account. If User Profile has access to other accounts, you will have to complete for each active account you would like to update.

Generate a New Registration Letter for a User

1. Click **Admin Tools** menu.
2. Click **Users**.
 - a. Users page displays.
3. Click **Username**.
 - a. User Profile displays.
4. Click **Generate Registration Letter** button.

User Account Information

Username (Email)
bcstest@gmail.com
User Profile Status
Pending

First Name *Required*
BCS

Middle Name

Last Name *Required*
Test

Job Title

Phone
(999) 999-9999 or (999) 999-9999 x9999

Fax
(999) 999-9999 or (999) 999-9999 x9999

Save

User Created By
dshs/peleap, 3/20/2020 11:22:36 AM

Last Modified By
dshs/peleap, 3/20/2020 11:27:52 AM

Registration Letter Last Sent
3/20/2020 11:25:14 AM

Entity Roles (0 Active; 1 Inactive) ****User Profile Status: Pending****

Account #	Entity Name	City	Role	Status	Registration Code
40010708	1st Merrill Creek Pkwy Senior Care Home LLC	Everett	Account Administrator	Inactive	49SUNW

Add New Generate Registration Letter

Go Back

5. Button appears for each role. A message appears stating that registration letter has been sent. Click the X to close the message.
6. Click **Go Back** Button.
7. User page displays and is reset.
8. User will receive the BCS Registration Letter within 15 to 20 minutes.
9. When the User completes registration, their profile status will change from *Pending* to *Enabled*.

User Account Information

Username

Email

User Profile Status Enabled

First Name *Required*

Middle Name

10. **Note:** External users that update their SecureAccess Washington (SAW) profile, will disconnect BCS as a service from their SAW account/profile. Therefore, the user may be required to login to BCS again.
 - a. Users will be required to contact their PAA for a new registration key or can contact BCCU.
 - b. Users who enter their password incorrectly multiple times, their SAW account will be suspended. Contact BCCU to be reset.

How to Change the Primary Account Administrator

Each entity must have an enabled and active Account Administrator who is set to 'Primary'. If there is no active Primary Account Administrator (PAA), then no other users may be added for the entity.

1. Click **Admin Tools** menu.
2. Click **Users**.
 - a. User page displays listing all users for the entity with Primary indicated.

↕User Name	↕First Name	↕Last Name	↕Role	↕Auth Type	↕Created Date	↕Last Login	Status	Primary
dshs\elderem	Beth	Elder	Account Administrator	Internal User	5/28/2018	5/25/2018	Enabled	<input checked="" type="radio"/>
dshs\collej	Jennifer	Colley	Account Administrator	Internal User	5/28/2018	5/25/2018	Enabled	<input type="radio"/>

3. The PAA may click the radio button in the Primary column for another Account Administrator to become the primary. Only the PAA can move the Primary to another Account Administrator.
 - a. The selected Account Administrator is now indicated as the Primary.

Managing Secondary Entities

Purpose of Secondary Entities

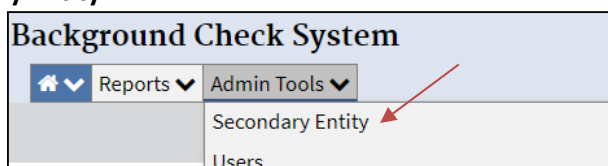
BCS includes functionality to add a Secondary Entity for Entity Accounts. Secondary Entities were created for entities to track background check activities for sub-contractors or otherwise categorize the background checks within their account. Secondary Entities are only visible and used by the entity account users. BCCU and Oversight Programs may not view Secondary Entity information in BCS.

In BCS, Secondary Entities are managed from the Admin Tools menu. The Secondary Entity page shows a list of all Secondary Entities added by the Entity Account Administrators. Checkboxes display for filtering the list.

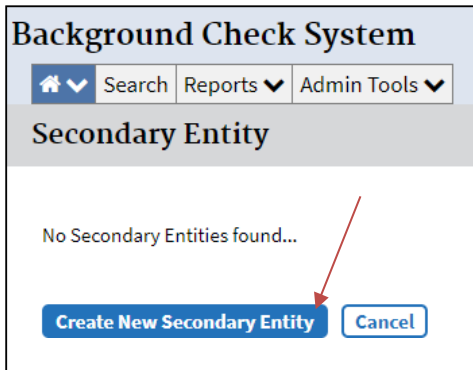
How to Add a New Secondary Entity

To Add a New Secondary Entity:

1. Select **Admin Tools** menu.
2. Select **Secondary Entity**.



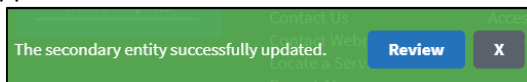
- 3. Select **Create New Secondary Entity** button.



- 4. Add Secondary Entity Name and Contact Information
 - a. Note: Only Secondary Entity Name is required. If you begin to add a contact person or address information, the information must be complete to save. Partial contact information will not save.

The screenshot shows the 'Create Secondary Entity' form. It has three main sections: 'Secondary Entity Name' with a 'Required' label and a text input field containing 'Example Entity'; 'Contact Information' with fields for 'Contact Name' (Jane Doe), 'Email Address' (Jane@email.com), and 'Phone' ((360) 555-1212); and 'Address' with fields for 'Address Line 1' (1234 Entity Lane), 'Address Line 2' (Suite A), 'City' (Olympia), 'State' (WA), and 'Zip Code' (98502). 'Save' and 'Cancel' buttons are at the bottom right.

- 5. Select **Save**.
 - a. Message appears. Select the X to close.



- 6. Log out of BCS and then Log back in.

- Follow the procedures to 'Enter a background check'; on the Select Entity Information Page, notice the new Secondary Entity is available in the Secondary Entity list.

Entity Information

Entity Requesting Background Check:
BCS TEST

Aging & Long-Term Support Administration > Residential Care Services > Initial License

Entity Account Number
11004460

Select secondary entity

Test

Type of Background Check

Name and Date of Birth

Fingerprint (includes WA State Name & Date of Birth AND Fingerprint Check)

Application Information

Applicant Name
TEST BCS

Applicant DOB
1/1/1990

Applicant Phone
(360) 902-0299

Archive
Edit Application
Save for Later
Submit to BCCU
Go Back

How to Update a Secondary Entity

To update a Secondary Entity:

- Select **Admin menu**.
- Select **Secondary Entity**.
- Select the Name of the Secondary Entity you wish to update from the list.
 - If the list contains more than one Secondary Entity, type keyword information in the search field and select the search icon to reduce the list.

Secondary Entity

Status
 Open
 Closed

Name	Contact Name	City	Date Created	Status
Example Entity	Jane Doe	Olympia	5/28/2018	Open
Another Contracted Place	Michael Jones	Tumwater	5/28/2018	Closed

- Update information for the Secondary Entity
 - Note: Only Secondary Entity Name is required. If you begin to add a contact person or address information, the information must be complete to save.
- Select **Save**.
- Log out of BCS and then Log back in. Follow the procedures to enter a background check; on the Select Entity Information Page, notice the new Secondary Entity is available in the Secondary Entity list

Search and Close Secondary Entity

To Search the Secondary Entity List:

1. Select Admin Tools.
 - a. Admin Tools menu shows.
2. Under Admin Tools, Select **Secondary Entity**.
 - a. Secondary Entity List is displayed.
3. Unselect the **Closed Button**.
 - a. The list of open secondary entities is displayed.

To Close/Reopen a Secondary Entity:

1. Select on the hyperlink to the secondary entity name
 - a. The details of the secondary entry are displayed.
2. Select **Close**.
 - a. Returns to BCS Secondary Entity page
3. Uncheck the Open box.
 - a. Shows closed Secondary Entity.
4. Select the closed entity.
 - a. The closed secondary entity opens.
5. Select the Reopen button.
 - a. NOTE: This is a known Error. The Reopen button is disabled and cannot be selected. Instead return to the Secondary Entity page and add a new **Open Secondary Entity**, **Save**, and return the Secondary Entity page. Returns to BCS Secondary entry screen with only Closed option selected, and the reopened entity does not show in the list
6. Unclick the **Closed Button**.
 - a. The list of open secondary entities is displayed.
7. Select **Cancel**.
 - a. Entity Home page is displayed.