West Virginia Department of Human Services

VeriCheck Agency Application and Portal

Welcome to WV VeriCheck Agency Portal

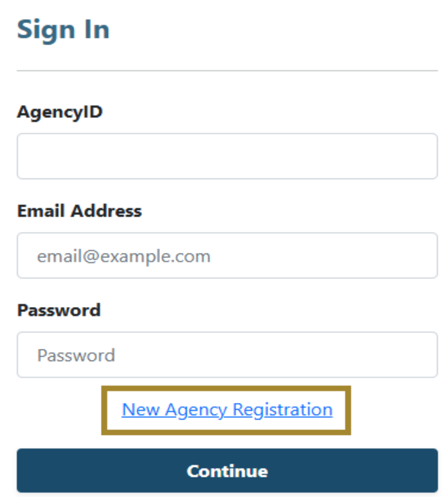
Introduction

Registering a New Agency and Accessing the Agency Portal are the two tasks we will cover in this module. We will cover Registering a New Agency First, but please feel free to jump to Accessing the Agency Portal if needed! The Agency Portal can be accessed at this link https://agency.wvvericheck.wv.gov/.

To access an existing Agency we will need the assigned AgencyID, email address, and password for the Agency user. Note that all three fields must be completed to log in! Otherwise, we can register a new Agency and await approval. The email address must match one of the contacts

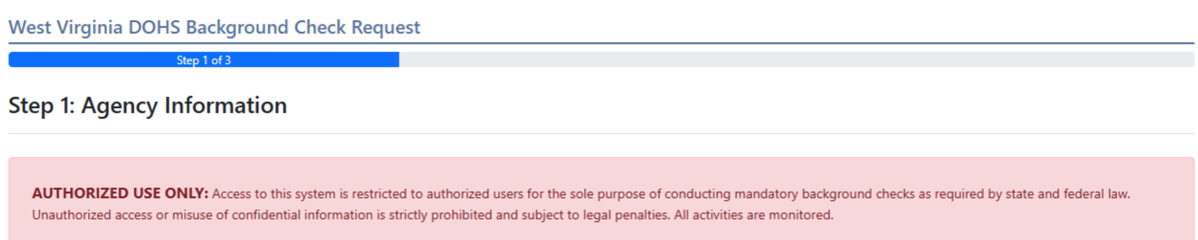
New Agency Registration

Our first stop is to Register a New Agency. On the main landing page we will see the **Sign In** screen, which we will largely not need to focus on. Instead, we will click New Agency Registration as shown to the right (**gold box**).

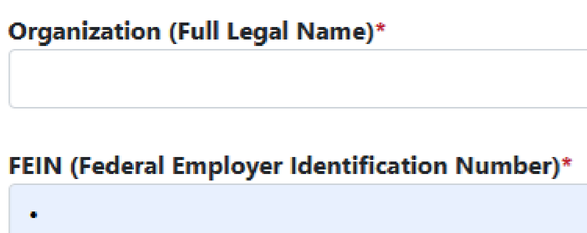


We will land on a page which says **West Virginia DOHS Background Check Request** and states we are on **Step 1 of 3**.

Step 1 is to fill out the Agency Information, which we will break down into sections. Note the red box reminding us that only **authorized use of the system** is allowed here, and that this system is intended for conducting mandatory background checks required by state and federal law. Misuse of the information can include legal penalties.

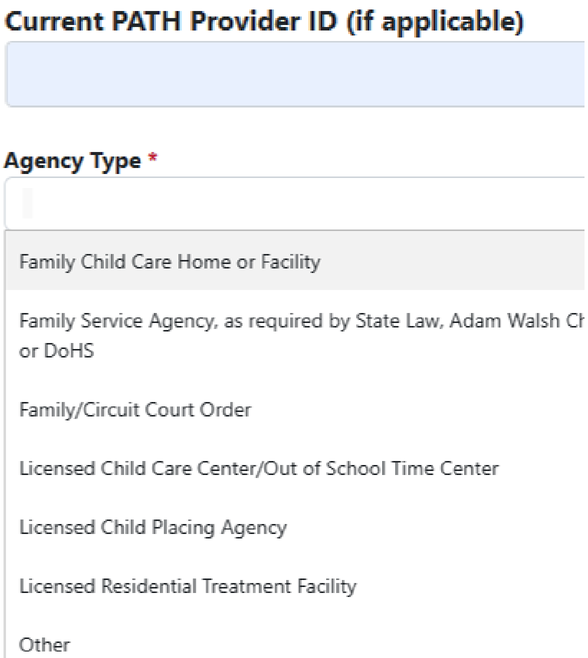


Below this red box we have four fields, which we will cover next:



Organization (Full Legal Name) means the organization's entire legal name as it appears on their licensure and legal paperwork. This would include any DBA or LLC additions as well.

FEIN (Federal Employer Identification Number) means the federal tax ID assigned to the business through the State and IRS, which is how employee records are tracked.



Current PATH Provider ID (if applicable) means the current ID assigned to the Organization in the PATH database, if one currently exists.

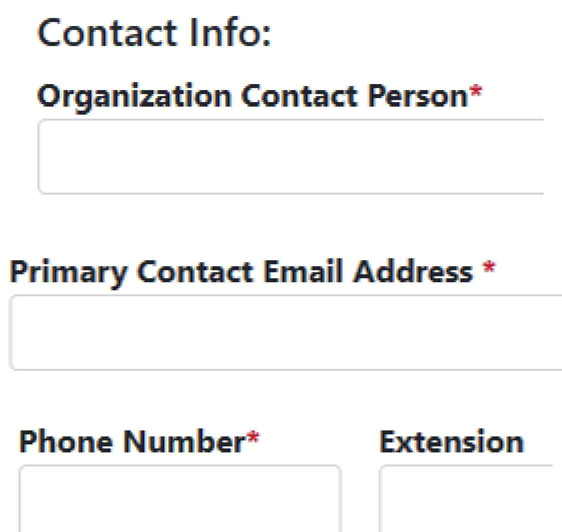
Agency Type will bring out a drop-down list with multiple options for the type of facility or Agency that is requesting registration, as shown in the lowest picture to the left. Note that this can include a Socially Necessary Service Provider (not shown)!

Below these fields are four more which cover the **Contact Information** for the Agency. This includes the following fields:

Organization Contact Person includes the name of the person who should be contacted to represent the organization if questions arise.

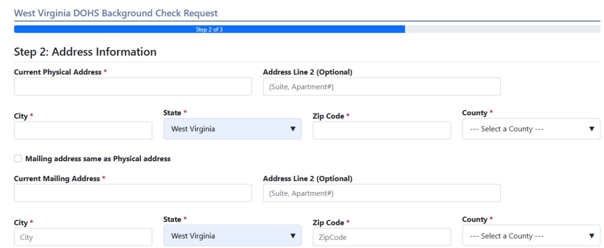
Primary Contact Email Address is the email address which should receive updates about the Agency Portal and matters related to the organization.

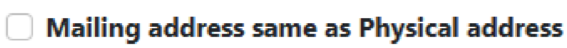
Phone Number and **Extension** are for the primary phone contact number of this contact person.



Once these have been completed and checked for accuracy, click the bright blue "Next: Address Information" button as shown by the **gold arrow** to the left.

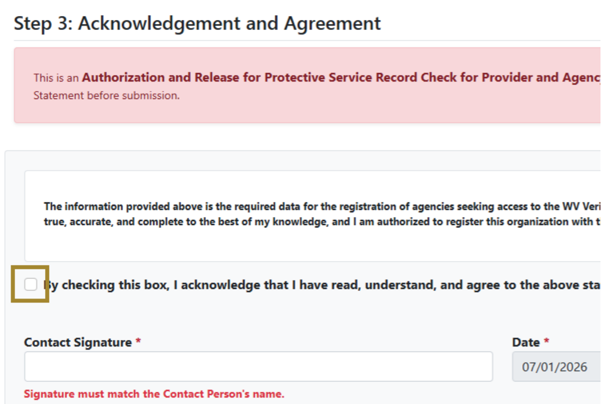
Now we move on to **Step 2 of 3: Address Information**. This screen gives fairly standard fields to complete for the current **physical** and **mailing** addresses for the organization. Note that there is a checkbox along the left side of the box between the two addresses which will copy the **physical address** information into the **mailing address** boxes below it, which can save some time! It looks like this:





Note that to complete this screen the <u>only</u> field that can be left blank is “Address Line 2”. **<u>All other fields must be completed</u>**.

When we are finished on this screen, click the “**Next: Certification**” button, as shown by the **gold arrow** to the right.

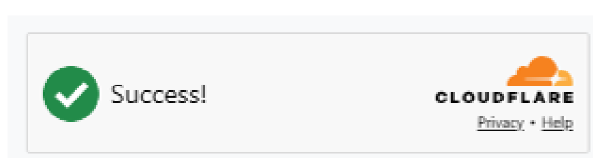


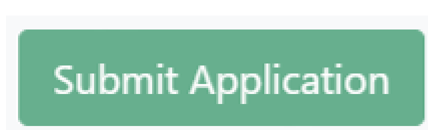
Next we will move on to **Step 3 of 3: Acknowledgement and Agreement**.

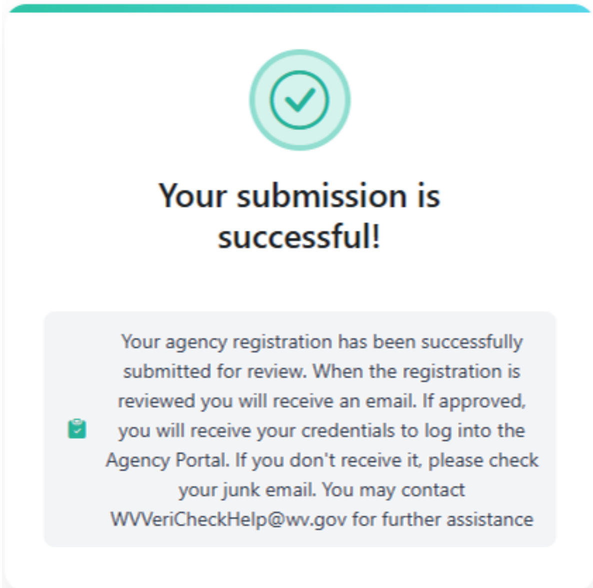
<u>Please note</u> that this screen requires the **Contact Person** from Step 1 to agree to the <u>Authorization and Release for Protective Service Record Check for Provider and Agency Personnel</u> disclaimer and the acknowledgement in the box below it by clicking on the check box (**gold box**), acknowledging that the **Contact Person** has read, understands, and agrees to the statements made on this page.

Note that the Contact Person’s name must match <u>exactly</u> what it was recorded as in Step 1.

Before moving on from this screen we must wait for the Cloudflare verification that we are, in fact, human. Once the green “Success” check is shown (pictured to the right), we can click on our “**Submit Application**” button in the lower right corner (as shown below).







Once our application is successfully submitted we will see the screen to the left! This means that the Agency's application has been sent to the VeriCheck system for work-up and Supervisor approval.

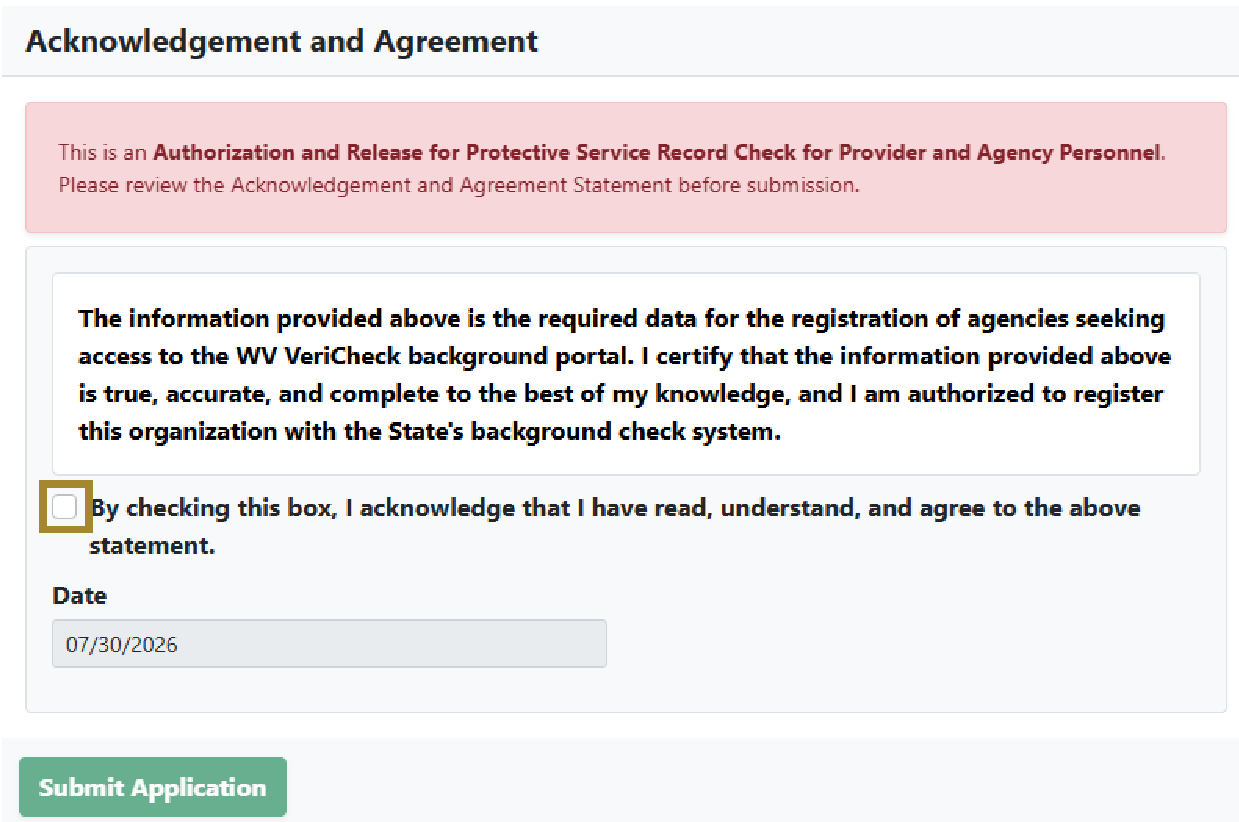
Congratulations! The Agency's application has been completed!

Next we'll see what the Agency Portal looks like once we get approved and can log in.

Accessing the Agency Portal

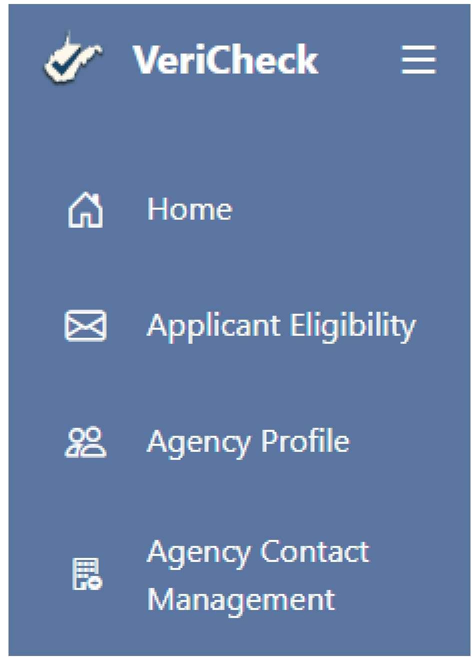
Within the Agency Portal we have two types of users. The first type of user is the “Worker” role, which will have limited access. Workers can only see the Eligible applications, which we will cover first. “Manager” roles are able to access the Agency Information to make edits or send for renewals, as well as to manage the contact persons (users) within the Agency. Let’s dive in!

Regardless of what type of user is logging in, the first time the user logs in they will be greeted with the following screen.



This screen requires the user to acknowledge the **Authorization and Release for Protective Service Record Check for Provider and Agency Personnel** agreement, which states that the information being provided is for the use of agencies accessing the WV VeriCheck background portal. The user must agree that the information being provided is true, accurate, and complete to the best of their knowledge and ability, and that they are an authorized representative of the Agency within the system. To continue, the user must check the checkbox (**gold box**).

Upon logging into the VeriCheck Agency Portal, the user will be shown a list of options along the left navigation pane depending on their role. While “worker” users will only have access to the **Home** and **Applicant Eligibility** functions, “manager” (supervisor) users will also have access to **Agency Profile** and **Agency Contact Management** functions. Here is what each of them do:



Applicant Eligibility allows the user to view applications that have come into the Agency for background checks. **(###VERIFY###)**

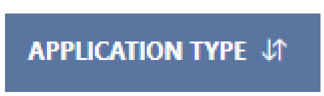
Agency Profile allows the manager to update the Agency’s contact information, address, even name or FEIN. It also allows managers to apply for renewal when necessary.

Agency Contact Management allows the manager to add, end-date, or entirely remove users from the Agency.

The **Applicant Eligibility** page allows users to view a list of applications. This is a table that displays, sorts ( ) and filters ( ) applications based on one of these criteria:

Applicant Name shows the name that was listed on the background check application.

Eligible/Ineligible shows the final decision made by VeriCheck workers as to the applicant’s eligibility based on the background check results.



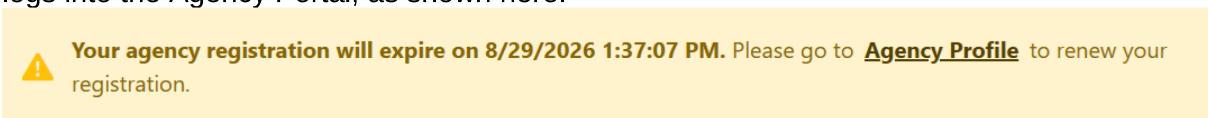
Application Type shows what *type* of service the applicant was applying for (e.g., Employment, Foster/Adoptive, or Inquiry).

Approval Date shows what date the applicant was approved, if they have been.

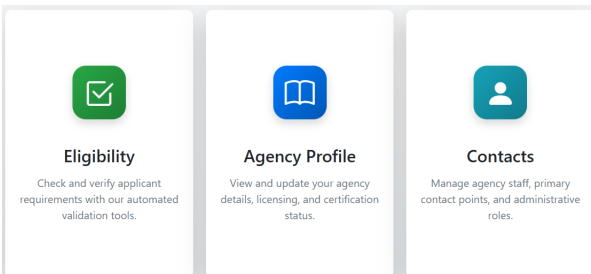
Users can also Print or Export the currently displayed list. This is useful if the user has filtered based on specific criteria and wants to print or export only that list, for instance. Exporting the list allows the user to access the data in another program, such as Excel.

Next we will review functions available to managers within the Agency.

First, it is important to note that there may be a message displayed when the manager first logs into the Agency Portal, as shown here:



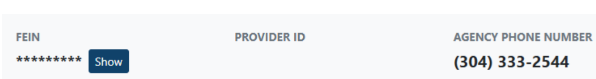
This message will display when the Agency is close to its renewal date, allowing renewal to be completed ***prior*** to the Agency's eligibility expiring.

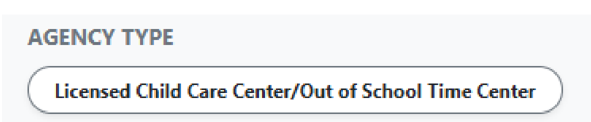


On the first screen we come to when we log in (which also can be reached with the **Home** function along the left navigation pane) we are given three options. Note that these options mirror the options on the left navigation pane as well.

Our next stop will be the **Agency Profile** page. This page displays a significant amount of information about the Agency, so let's break it down. Near the top of the page will be the "**Modify**" and "**Renew**" buttons, which we will cover later. For now, let's focus on the rest of the page.

To begin, we have the Agency Name and a red box that says "Read Only Mode", as shown to the right. Note that the Agency Name should be verified here for accuracy. The "Read Only Mode" is present because we have not entered "**Modify**" mode from the above button. More on that later.

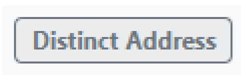


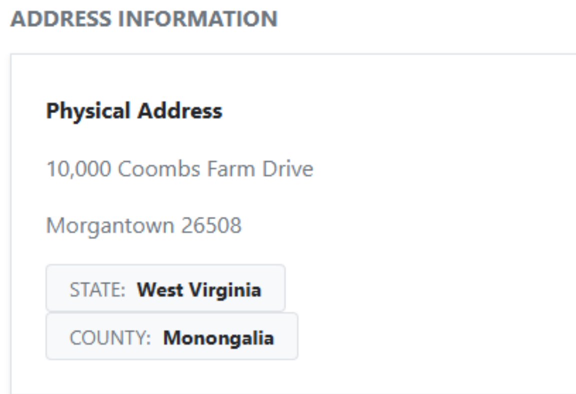


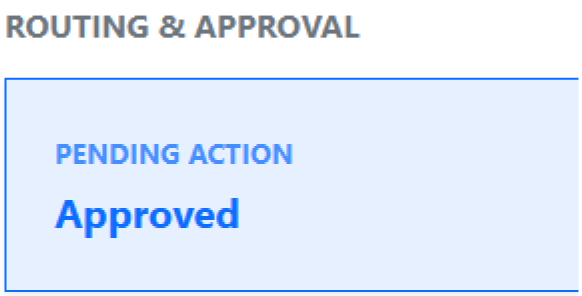
Next we have fields to display additional Agency Information. First we have the **FEIN** (Federal Employer Identification Number) for tracking employees and tax information, the **Provider ID** as it is stored in PATH, and the **Agency Phone Number** as it is stored in the Agency Portal, as shown to the left.

Below that we have the **Agency Type**, which displays what services the Agency is eligible to provide for families.

Below this we have the **Address Information**. Note that this address includes both the **Physical Address** and the **Mailing Address**, regardless of whether they are identical. Also note that if there *is* a difference between the two, the box shown below will display with the mailing address showing that it is a unique address:

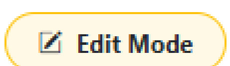






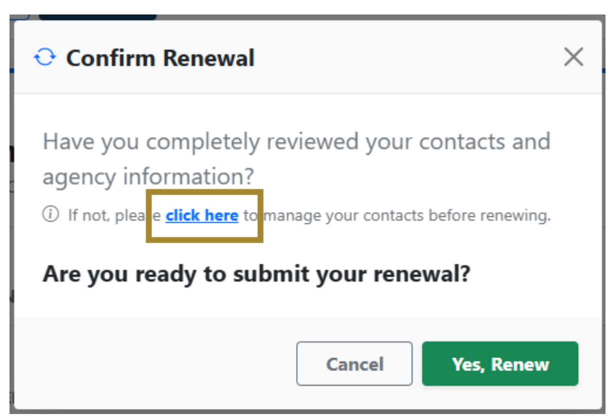
Finally, we have the current **Approval** status. If the Agency has recently been sent for renewal, this will display a “Renewal Pending” message, but if the Agency is currently approved and the system is ready for them to act, the “Approved” message will be displayed instead.

Finally, if we click the “**Modify**” button at the top we enter into what is called “Edit Mode”, denoted by this mark on the Agency Information window:

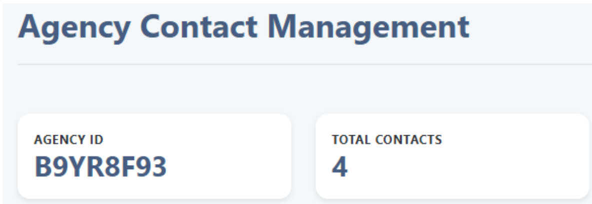


In “Edit Mode” Agency information can be changed. Once the information has been successfully changed, click the “**Save Changes**” button, which has replaced the “**Modify**” button, as shown below:

Additionally, if the manager selects the “**Renew**” button, the menu to the right will be displayed. This menu will prompt the manager to ensure all of their contacts (users) and agency information is up to date and current before submitting the renewal for approval! To adjust information, either click “**Cancel**” to go back and **Modify** information, or click the blue “**click here**” link (**gold box**) to go to the Contacts screen to make changes there.



Finally, let’s address the **Agency Contact Management** screen. This screen allows us to end-date workers who no longer work for the Agency, to **Add New Users** as needed, and to update contact information for users if needed.



First, note that the **Agency ID** is displayed alongside the **Total Contacts**. This ensures that we are working with the correct Agency as well as showing us the number of workers currently assigned to the Agency.

The table below this displays a **Contact Directory**, which shows each user in the Agency as well as information about them. The information to the right can be sorted ( ) and filtered ( ) as needed, and is displayed for each worker:

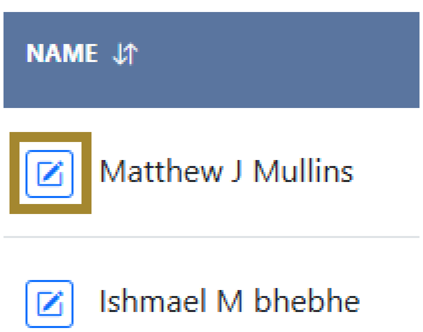
<u>**Name**</u> is the name of the user. Note that the name is not *necessarily* the same as the **User ID / Email** information.

<u>**User ID / Email**</u> is the login information ***as well as*** the email address that password changes and notifications will go to.

<u>**Role**</u> is the role within the agency (either worker or manager).

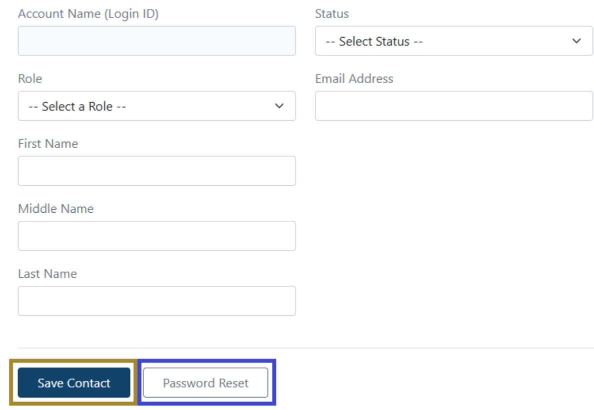
<u>**Valid From**</u> displays the date that the user was entered into the **Contacts** for the Agency.

<u>**Account Status**</u> shows whether the user's account is currently Active (i.e., allows them to login and operate within the Agency Portal) or not.



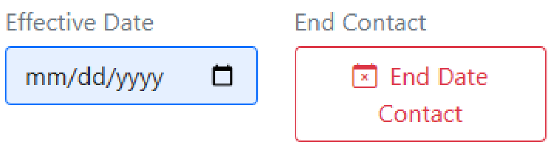
Note that if we want to make changes to an existing user, we can simply click on the blue pencil-on-page icon next to their name, as shown by the **gold box** to the left.

If we do choose to edit an existing user, then our screen will scroll down and their user data will be entered into the fields shown to the right. Note that these fields will be populated with the user's information!



Using the fields we **can not** change their **Account Name (Login ID)**, but we **can** change their **First Name**, **Middle Name** (or initial), and **Last Name**. We can also change their **Email Address**, as well as change their **Role** (Worker versus Manager) and their **Status** (Active versus Inactive). Note that changing them to Inactive will remove them from the **Contacts**!

To save our changes we need to click the "**Save Changes**" button (**gold box**). We can also do a **Password Reset** (**blue box**) from this menu if the user has forgotten their password.

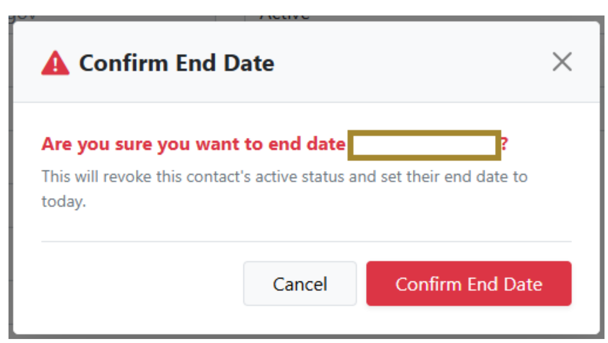


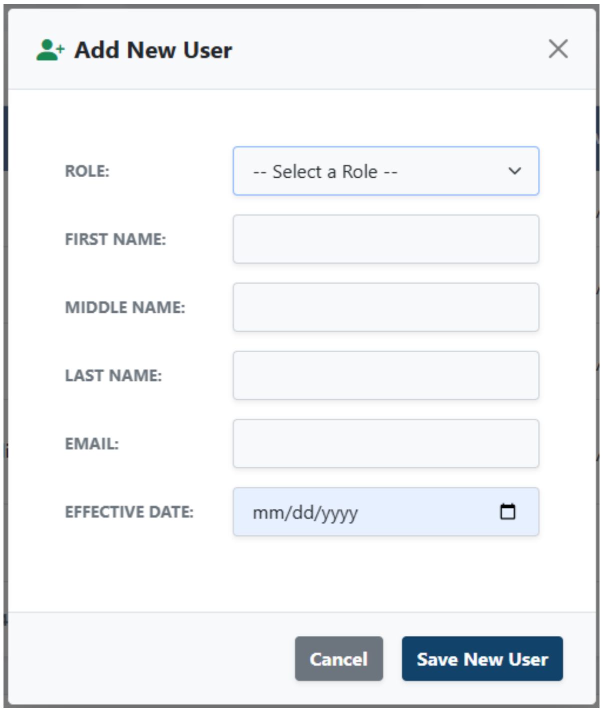
Additionally, to the top right we have two more fields, as shown to the left.

We can change the **Effective Date** of the information with the leftmost field. This allows us to say that the user has these permissions, name changes, or other relevant details on a certain date.

We can also **End Date the Contact**, which will remove them from the system entirely.

If we choose to **End Date the Contact**, the following confirmation menu will be displayed. This prevents us from accidentally end dating the wrong user, and in the **gold box** will display the user's name. We must click "**Confirm End Date**" to remove the user, or "**Cancel**" to go back.





Finally, one other scenario exists in this menu. Near the top right we see a button to “**Add New User**” as shown below:

Clicking this button will open a new dialog menu (shown to the left) where we must enter the information for the new user. Note that these menus are the same as the editing menu we saw before, though they are laid out differently. We must add a **Role** (worker or manager), a **First Name**, **Middle Name** (or initial), **Last Name**, **Email** address, and **Effective Date** for when they are allowed to access the system.