

Family Services Initiative Staff Access, Usage & Termination

Staff Access:

To obtain access to the Central Florida Health Data System (CFHDS):

There is a **Central Florida Health Data System** Access Request Form packet that is located on the JWB-FSI SharePoint site. If you or your Supervisor do not have access to JWB-FSI SharePoint, please contact Central Florida Behavioral Health Network, Inc. (CFBHN) directly to receive a Request Form packet by email. All forms identified below must be received by CFBHN to obtain Central Florida Health Data System access.

Please follow the instructions below to access the Central Florida Health Data System.

1. Complete the following forms

A. CFBHN Data Access Request Form

- I. Form **must** be electronically typed or it will not be accepted.
- II. You and your supervisor need to sign and date the form.

B. Security Agreement Form

- I. Form **must** be electronically typed or it will not be accepted.
- II. You and your supervisor need to sign and date the form.

2. Complete the following trainings offered by the Department of Children and Families located here: <http://www.myflfamilies.com/about-us/dcf-training>.

A. Security Awareness Training

B. HIPAA Information and Action

3. Fax or e-mail the following completed documents

A. CFBHN Data Access Request Form

B. Security Agreement Form

C. Security Awareness Training

D. HIPAA Information and Action

All requests can be sent by fax at 813-740-4821 Attn: Request Access, or can be emailed to requestaccess@cfbhn.org. If you have any questions, the IS Department can be reached via email requestaccess@cfbhn.org or phone at 813-740-4811.

To obtain a FSI Named Purchase Card (P-card):

Named Purchase Cards: named Purchase Cards (P-card) are utilized by all FSI agencies excluding the Pinellas County School Board. Named cards are assigned to agency staff and both the staff name and the agency name are on the purchase card. Named P-cards cannot be shared. These cards have a monthly limit which automatically resets at the beginning of each billing cycle as established by the Purchase Card program. The billing cycle is usually the last day of the month, or the last working day of the month if the end of the month falls on a weekend. Agency supervisors or program managers who work for an FSI program complete a P-Card Request Form to request a named card for their staff. This form can be found in JWB-FSI Share Point in the agency site under the Forms FSI folder.

1. The P-Card Request Form is submitted to the Coordinator in JWB's SharePoint site. The agency supervisor indicates on the form the following:
 - the agency
 - the name of the card holder
 - the maximum number of card transaction per day
 - the single transaction limit
 - the daily and monthly limits

Forms must have all information completed and must be signed and dated by the requestor. If the form is not complete, the Coordinator will contact the requestor to obtain the missing information. Once the form has complete information, the Coordinator will request the card through the Purchase Card program. If a card is being requested for a supervisor or program manager, the form must be completed by the next higher level of management at the agency.

Once the Coordinator requests the card, the Coordinator will sign and date the request form with the date the card was requested from the Purchase Card Program.

When the P-card is received by the Coordinator, the Coordinator fills in the complete 16 digit card number and the name of the cardholder at the top of a blank Purchasing Card Agreement form and adds the card information to the named P-card inventory spreadsheet. The card and the Agreement will be provided to the cardholder at FSI training. All new cardholders must complete initial FSI training prior to receiving their FSI card. The staff member must read the form and complete applicable staff information on the form. They also will verify the card number at the top by initialing next to the 16 digit card number on the form. Once the staff member has read the form and completed the information, they will give the form to their supervisor for review and signature. The form will then be returned to the Coordinator who will also review and sign the form. After the form has been completed by appropriate agency staff, it must be returned to the Coordinator. Once the Coordinator receives the completed, signed and dated form, the card can be activated in the Purchase Card Program.

Usage

FSI Purchase Card Usage:

The Procurement Card Coordinator will run a Purchase Card (P-card) usage report at the end of each quarter (January, April, July & October). The report will contain the staff name, the last 4 digits of the card, the agency and the date the card was last used. The Coordinator will forward this report to each program supervisor and manager by the 10th of the month that the report is generated in.

The supervisor will review the report and determine if their staff P-cards have not been used within the quarter of the report. Program management staff will review supervisor's usage for the prior 12 months. If the supervisor or the manager would like to have the cards remain active, they will provide to the Coordinator justification in writing by the 20th of the same month of the report as to why the card should remain active.

If the Coordinator does not receive a response by the 20th, all cards meeting the criteria will be inactivated by the 25th of the month.

Confidentiality for Agency Employees Accessing FSI

Any employee working on behalf of a collaborative agency that would like to receive services/goods through FSI must meet the FSI eligibility requirements, unless otherwise waived by Exceptions Committee.

***Employee:** is a staff member of one of the collaborative agencies that has a working knowledge of FSI and/or has been assigned a named p-card with direct access to FSI funds.*

If a current employee qualifies for services with the Family Services Initiative meeting eligibility criteria (see Family Services Initiative - **Eligibility**), the following procedures should be followed in order to protect the employee's confidentiality.

Procedure:

1. An employee must notify their supervisor regarding the request for FSI assistance and provide documentation as applicable.
2. Employee's Supervisor will review eligibility requirements and assess the needs of the staff member.
3. Employee's Supervisor will ensure that all other community resources have been explored prior to making this request.
4. The employee's Supervisor shall notify the Manager/Director overseeing the FSI program for that agency prior to step 5.
5. Employee's Supervisor or Manager will contact CFBHN to review the request, eligibility, and ensuring documentation requirements are met.
6. Employee's Supervisor or Manager will email the request to the Exceptions Committee for review. CFBHN staff shall be included on the email. Note: JWB is subject to the Sunshine Law; therefore, any personal identifying or sensitive information should not be included in the email request.
7. If Exceptions Committee approves the request:

- a. Employee's Supervisor enters the request into CFHDS. * If Supervisor ~~or~~ does not have CFHDS access, contact CFBHN staff for data entry in the system.
8. CFBHN will close agency access to the record after approval to protect the employee's confidentiality.

Conflict of Interest

Family and Friends Accessing FSI

Family: is any person that is related by blood, marriage, or legal relationship.

Friend: is anyone with whom you are acquainted with.

An FSI employee may not provide any services directly to any of their own family members or friends. If an employee becomes aware that a family and/or friend is requesting services/goods through the FSI, the employee's supervisor and the Manager/Director overseeing the program for that agency must be immediately notified by the employee. The supervisor must immediately remove the employee from the case and assign to a new staff member who is unrelated/unassociated with the recipient.

Termination

Inactivating P-cards or Staff Termination:

When the Coordinator is notified that a staff person is no longer employed in the FSI program, or a generic card needs to be inactivated, the agency must complete the P-card Change Request Form and return the card and the form to the Coordinator. The P-card Change Request Form can be located in Share Point, Collaboration, FSI Family Services Initiative, Forms FSI.

Staff Termination:

Upon termination of employment, **agencies must complete and submit the JWB Purchasing Card Change Request Form to The Juvenile Welfare Board of Pinellas County (JWB) and the Central Florida Health Data System Access form to Central Florida Behavioral Network, Inc. (CFBHN) on or before date of termination.**

The JWB Purchasing Card Change Request Form needs to be filled out for any staff that transitions out of a staff role or terminates from the agency. Agencies will make sure that any named purchasing cards are removed from the staff on or before the date of termination and that the terminated staff will have no access to any generic purchasing cards.

- Collect P-card from staff and review any credits/debits or card disputes with supervisor.
- Notify JWB Procurement Card Coordinator of any pending credits or disputes.
- Complete the P-card Change Request Form (submit to the JWB Procurement Card Coordinator)

- Complete the Central Florida Health Data System Access Request Form (submit to CFBHN)
- Complete the SharePoint Access Request Form (submit to JWB Procurement Card Coordinator)
- Return the named purchasing card to the JWB Procurement Card Coordinator within 10 business days upon staff's termination date.
- After staff termination, any paperwork that needs to be signed by staff should be signed off by supervisor.

1/11/17