Family Services Initiative (FSI)

FSI Staff Access, Usage & Termination

Staff Access:

<u>To obtain access to the Juvenile Welfare Board ServicePoint (JWB – SP):</u>

There is a ServicePoint Access Request Form located on the JWB-FSI SharePoint site. If you or your Supervisor do not have access to JWB-FSI SharePoint, please contact Juvenile Welfare Board (JWB) directly to receive a Request Form by email. All forms identified below must be received by JWB to obtain ServicePoint access.

Please follow the instructions below to access the JWB – FSI ServicePoint data collection system.

1. Complete the following form

    A. **Juvenile Welfare Board ServicePoint Access Request Form**

        I. Your supervisor needs 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. E-mail the following documents to UM@jwbpinellas.org.

    A. **JWB ServicePoint Access Request Form**

    B. **Security Awareness Training Certificate of Completion**

    C. **HIPAA Information and Action Certificate of Completion**

All requests can be sent by email to UM@JWBpinellas.org Attn: Request Access. If you have any questions, Utilization Management can be reached via email at the above email or contact Jen Manick at 727-453-5602.

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

Named Purchase Cards: Named Purchase Cards (P-card) are utilized by all FSI agencies. 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 SharePoint in the agency site under the Forms FSI folder.

1. The P-Card Request Form is submitted to the Procurement Card Administrator (Card Administrator) 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 Card Administrator will contact the requestor to obtain the missing information. Once the form has complete information, the Card Administrator 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 Card Administrator requests the card, the Card Administrator 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 Card Administrator, the Card Administrator 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. After the form has been completed by appropriate agency staff, it must be returned to the Card Administrator who will review and sign the form. Once the form is completed with all required signatures, the card can be activated in the Purchase Card program.

Usage

<u>FSI Purchase Card Usage:</u>

The Card Administrator 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 Card Administrator 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 Card Administrator justification in writing by the 20th of the same month of the report as to why the card should remain active.

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

Termination

<u>Inactivating P-cards or Staff Termination:</u>

When the Card Administrator 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 Card Administrator. The P-card Change Request Form can be located in SharePoint, Collaboration, FSI Family Services Initiative, Forms FSI.

<u>Staff Termination</u>:

Upon termination of employment, ***<u>agencies must complete and submit the JWB Purchasing Card Change Request Form and the JWB ServicePoint Access Request Form to The Juvenile Welfare Board of Pinellas County (JWB).</u>***

The Provider is responsible for maintaining written policies and procedures for providing data to JWB in a timely manner. The Provider is responsible for reviewing JWB Database and JWB Secure Portal User Access to ensure that all users are active employees with access to appropriate data systems and modules. Provider shall notify JWB and complete the designated form immediately upon involuntary termination and within five (5) business days upon voluntary separation or whenever a Provider staff person's access must be inactivated due to the reasons outlined in JWB's Data Quality Manual. The Provider is responsible for implementing appropriate procedures into their data policies to protect data and prevent accidental or malicious disclosure of participant information.

The JWB Purchasing Card Change Request Form and JWB ServicePoint Access Request Form needs to be filled out for any staff that transitions out of a staff role or terminates from the agency. **In the event of involuntary termination, Provider shall notify the Card Administrator immediately.** 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 Card Administrator of any pending credits or disputes.
- Complete the P-card Change Request Form (submit to the Card Administrator)
- Complete the JWB ServicePoint Access Request Form (submit to UM@JWBpinellas.org)
- Complete the SharePoint Access Request Form (submit to the Card Administrator)
- Return the named purchasing card to the Card Administrator 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.