DCJS Acadis Portal Guide

Guide to Roster Entry for Security Guard Training Programs



Introduction

Background

The Division of Criminal Justice Services, Office of Public Safety is responsible for the approval and tracking of Security Guard Training in the State of New York. In the past, any security guard course documentation received by or transmitted from DCJS was done through a paper based process requiring data entry by both security guard school directors and DCJS staff.

To streamline the process, DCJS procured a comprehensive web-based training and certification management system, Acadis ™ Readiness Suite, designed to submit and approve security guard training in one consolidated database. Acadis provides tangible benefits to security guard school directors in New York State by allowing directors the ability to electronically report training rosters to DCJS.

More information about the Acadis Readiness Suite can be found at http://www.envisagenow.com/solutions/the-acadis-readiness-suite/.

Purpose of Guide

This guide will provide Security Guard School Directors with the step by step process required to create training events, select rosters and submit those rosters to DCJS for approval. Additionally, the training will provide School Directors with the process to monitor their submissions and make any necessary corrections as required by DCJS staff.

Access Requirements

Prior to accessing the Acadis system, each agency must:

- 1) Submit a signed Use and Dissemination Agreement to DCJS
- 2) Identify Acadis portal user
- Obtain system permissions from DCJS for agency-identified users
- 4) Only Owners, Directors and Co-Directors will be allowed access to the Acadis System.

How to Utilize this Guide

For quick reference of a specific section of this guide, users can refer to the Table of Contents and select the hyperlink for the corresponding section. For questions regarding the system, users can email dcjs.ny.gov for assistance.

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Section 1: Accessing the Acadis Portal

In this section you will learn how to:

- ✓ Login to your Acadis account.
- ✓ Navigate your Acadis Portal Homepage.

Note: Using the "Back" button in your browser could cause you to lose any unsaved progress. When using Acadis it is best to always utilize the buttons and key prompts within Acadis, not those on your web browser.

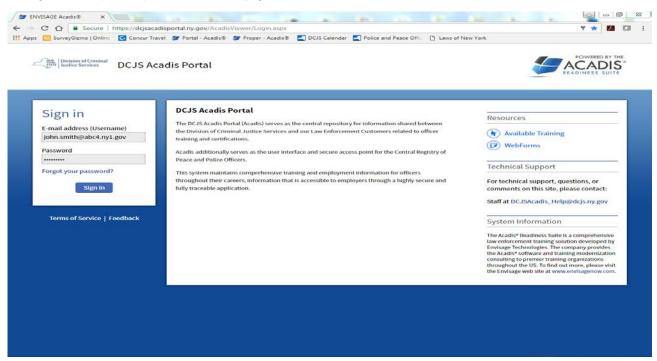


Additional Information:

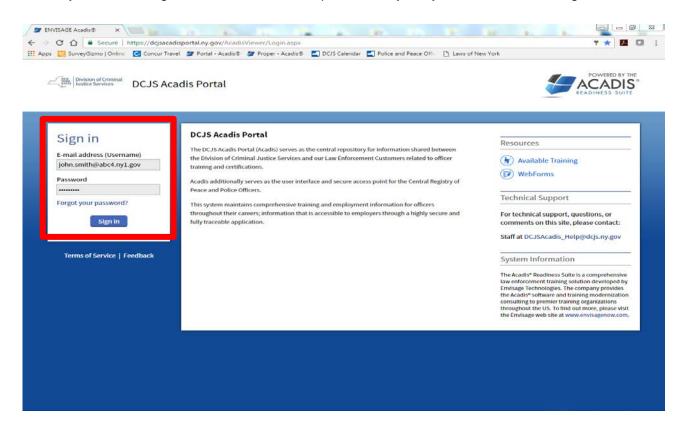
- It is important to remember before utilizing Acadis to either disable your web browser's popup blocker or add Acadis to your list of exceptions for pop-ups.
- The Acadis system will automatically log you out of the system if the computer you are working on is idle for 20 minutes. If you need to step away from your computer for any reason, be sure to utilize the "Save AS Draft" button to ensure you do not lose any of your entered data.
- You **cannot** use the Acadis system to verify student's previous employment history.

Logging into your Acadis account

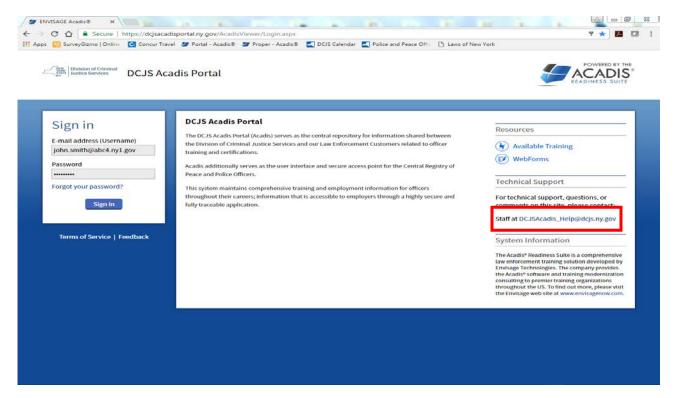
Navigate to https://dcjsacadisportal.ny.gov



Enter your Acadis login credentials that were provided to you by DCJS and select "Sign In".

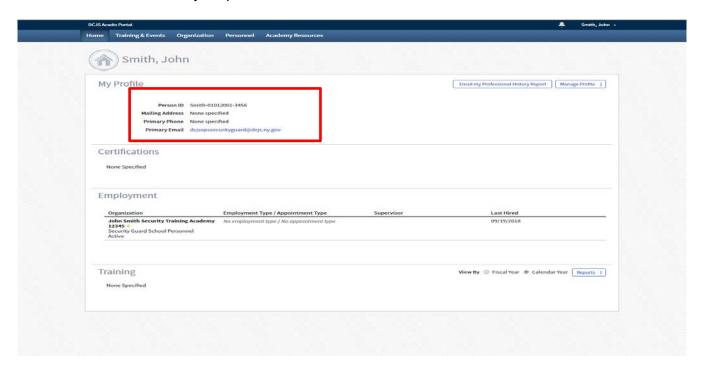


If you are an agency identified user and do not yet have your login information, please contact DCJS at dcjs.ny.gov or DCJSAcadis Help@dcjs.ny.gov Otherwise, please move on to the next page.

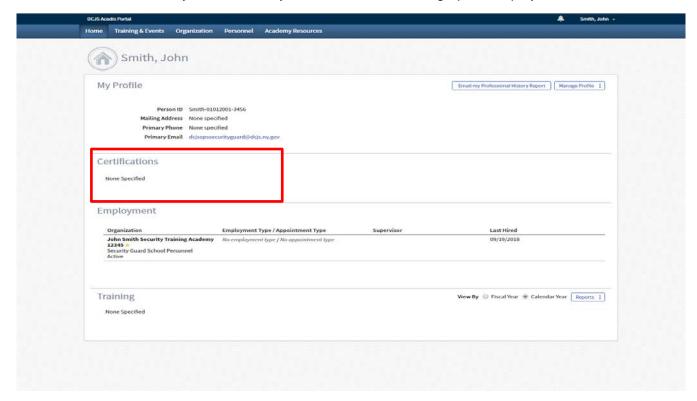


Navigating Your Acadis Home Screen

Once you have signed in to the Acadis Portal you should become familiar with your Acadis profile home screen. First, review your profile information and ensure it is correct.

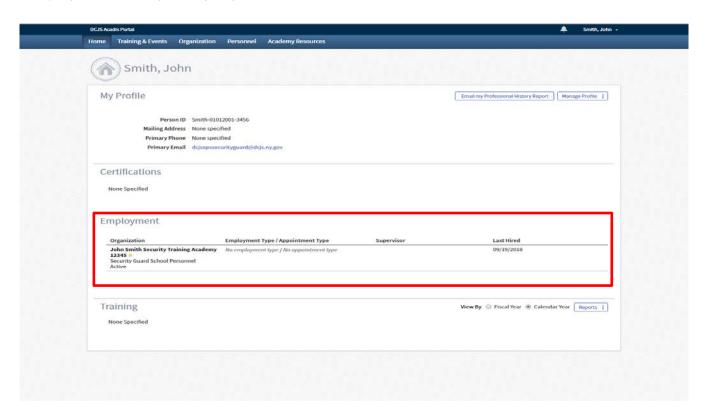


All of your certifications will be displayed under the "Certifications" heading on your home screen. These will be any certifications you have obtained through prior employment.

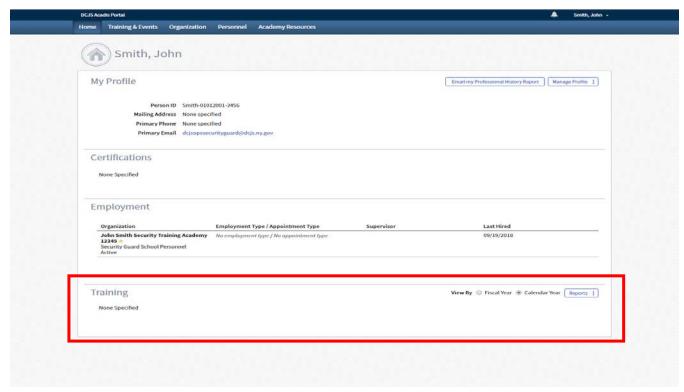


Under the "Employment" heading you will be able to view your current place of employment.

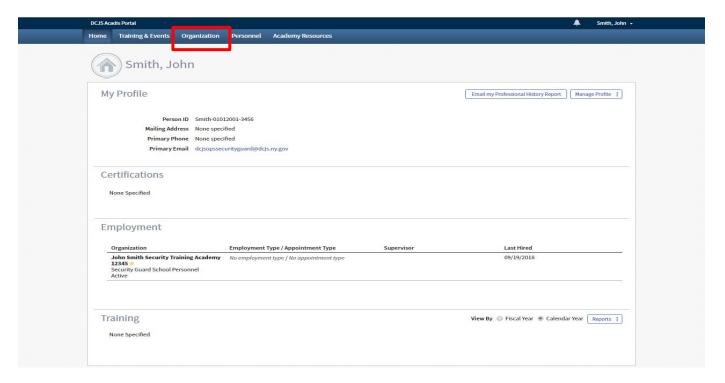
The date under "Last Hired" is a generic date and has no relation to you or your employment history in anyway.



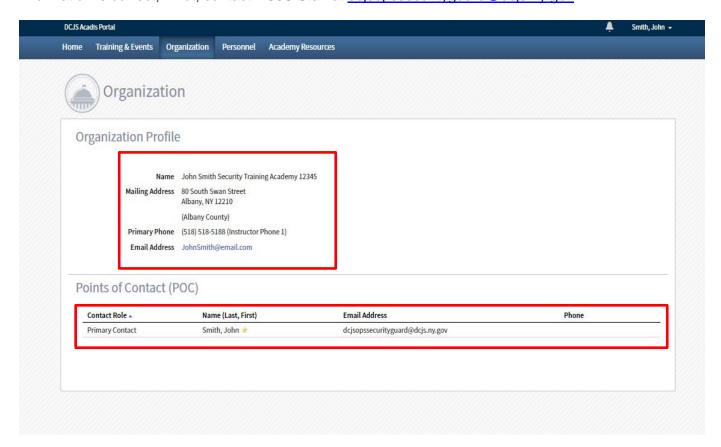
The "Training" heading will show any training you have conducted.



To view your Organization's information, click on the "Organization" tab in the tool bar at the top of the screen.



You will now be on your Organizations page where you can view the contact information for your organization along with staff who are assigned access to the Acadis Portal. Verify that all the information is correct, if not, contact DCJS Staff at dcjsopssecurityguard@dcjs.ny.gov



Congratulations. You have completed Section 1: Logging into the Acadis Portal. You should now be able to successfully login to the Acadis Portal.

You should also have a basic understanding of the information available to you on your Acadis Portal home page. The next section of this guide will walk you through the Training & Events tab and the process to submit courses to DCJS for approval.

Section 2: Submitting Course Rosters for Approval

Section 2 will teach you how to:

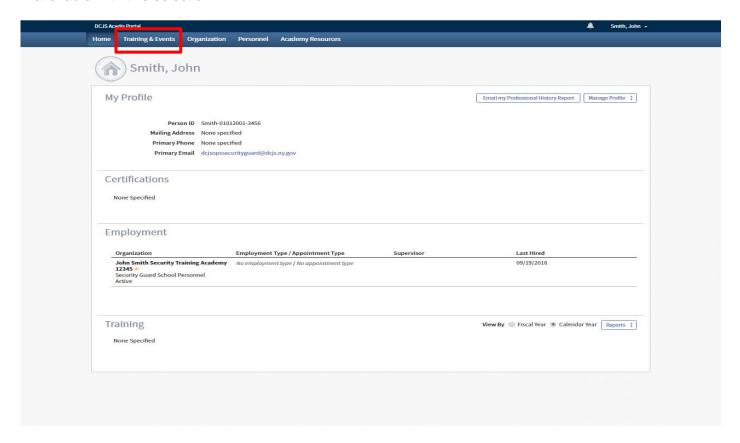
- ✓ Submit training courses and rosters for approval.
- ✓ Track course submissions and monitor for approval.
- Edit, make corrections and re-submit rejected courses.

In this section where you see the following symbol, , it relates to an action that if not properly performed will be cause for having your roster rejected. It is very important to review these points and to review your work throughout the roster submission process to ensure you are completing all the required data in an acceptable manner.

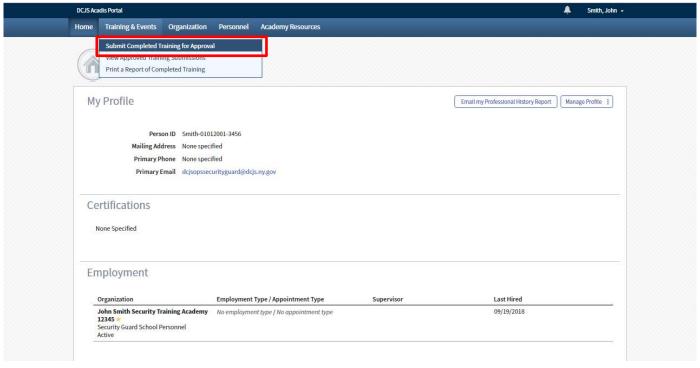
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Submitting a Training Event

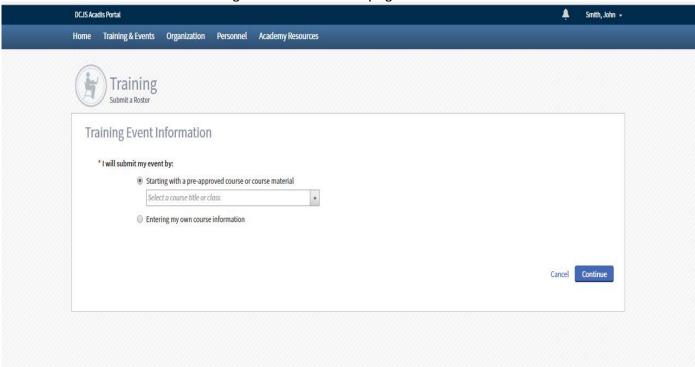
From your Acadis Portal home screen, scroll over the "Training & Events" tab to view the options available with this selection.



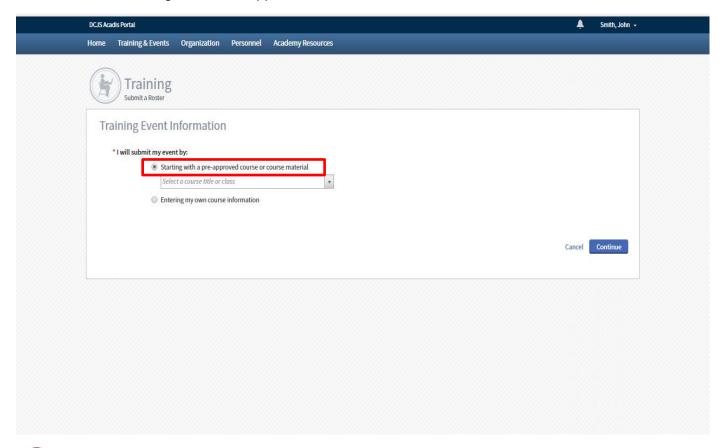
For this step, select "Submit Completed Training for Approval" from the drop down menu.



You should now be on the "Training Event Information" page.

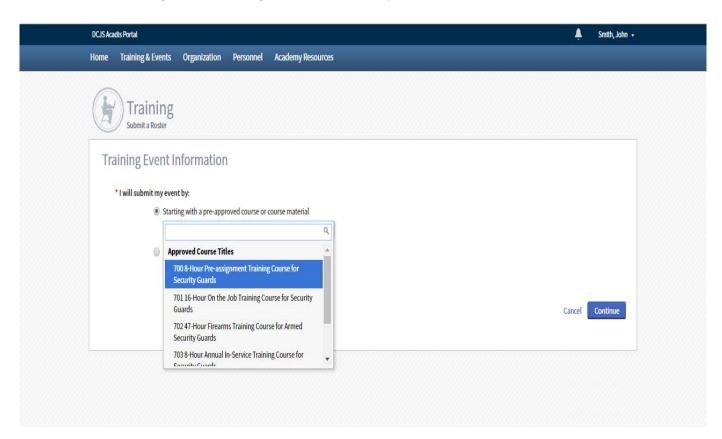


Make sure that "Starting with a Pre-Approved Course or Course Material" button is selected.



Do not select "Entering my own Course Information". Selecting this button will cause your course to be rejected by DCJS staff.

From the drop-down list select course you will be submitting a roster for. For this guide we will be utilizing the 700 8-Hour Pre-Assignment Training Course for Security Guards.

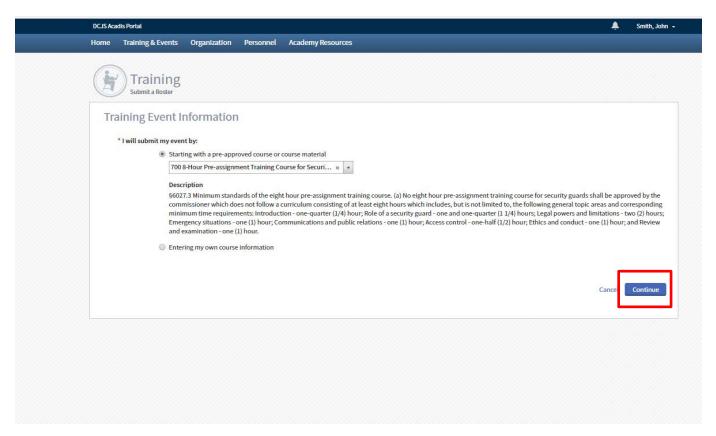




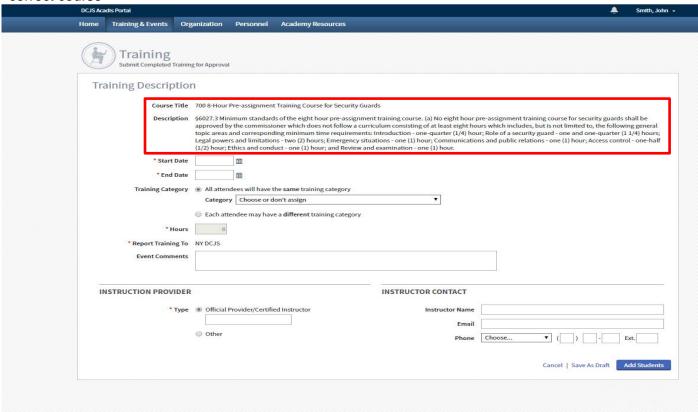
The course options are:

- 700 8-Hour Pre-Assignment Training Course for Security Guards
- 701 16-Hour On the Job Training Course for Security Guards
- 702 47-Hour Firearms Training Course for Armed Security Guards
- 703 8-Hour Annual In-Service Training Course for Security Guards
- 704 8-Hour Annual Firearms Training Course for Armed Security Guards
- 705 40-Hour Instructor Development Course

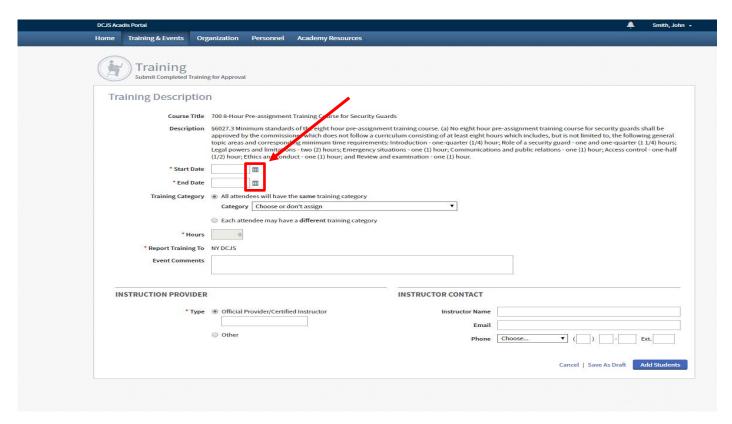
After selecting the course you are submitting, a description will appear. Ensure this is the correct course and select "Continue"



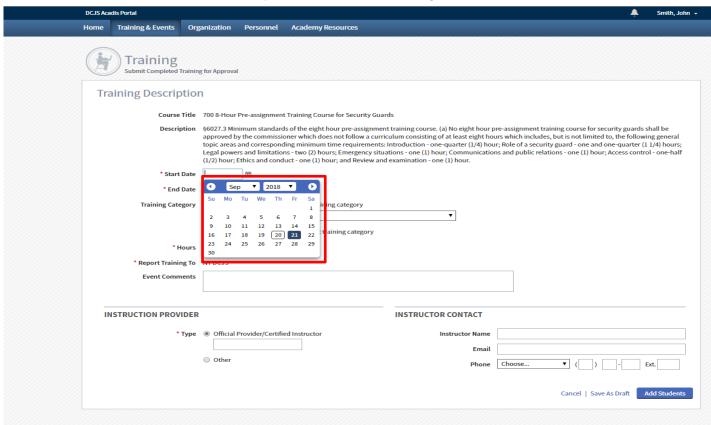
You should now be on the training description page. Before continuing verify that you have selected the correct course



If the course is correct, enter the start and end dates of the training provided by selecting the calendar icon next to the text boxes.

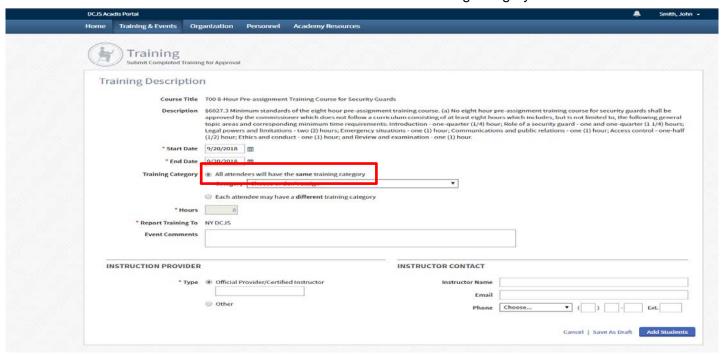


Select the dates from that calendar that you conducted the training.



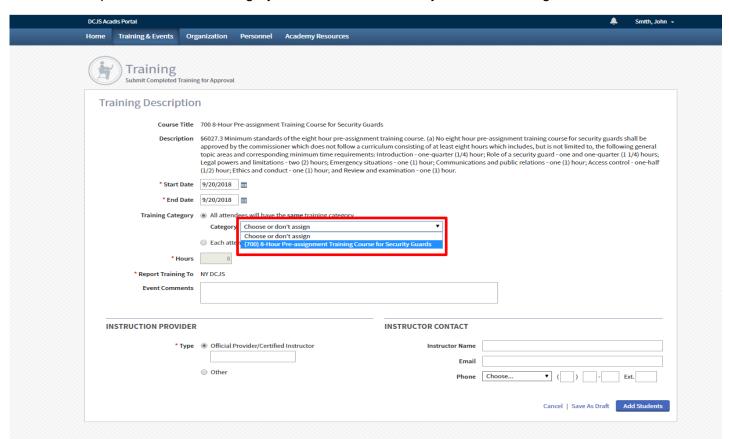
DCJS Acadis Portal Guide | Section 2: Submitting Course Rosters for Approval

Ensure that the button next to "All Attendees will have the same training category" is selected.

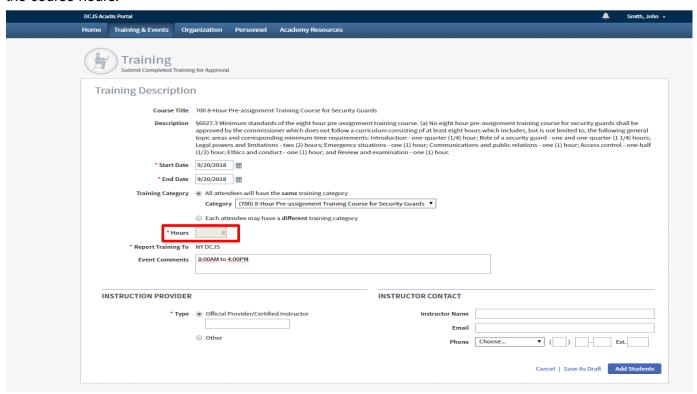


Do not select the button for "each attendee may have a different training category", doing so will cause your submission to be rejected by DCJS staff.

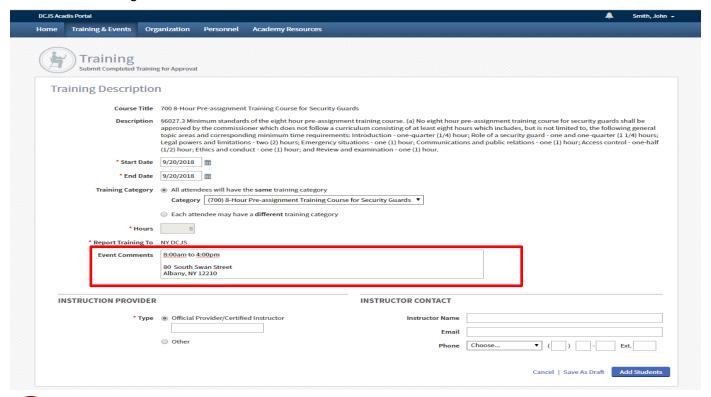
Select the dropdown menu for "Category" then select the course you are submitting a roster for.



The "Hours" box is locked with the correct course times in place. You will not have access to change the course hours.



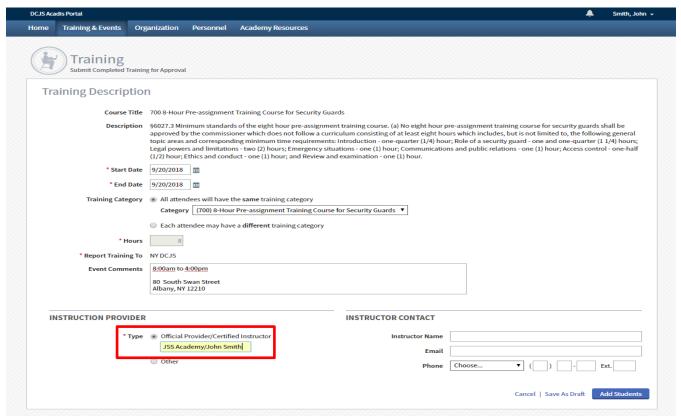
In the "Event Comments" text box, enter the physical address of the training location and the start/end times of the training conducted.



Not entering physical address of the training and the start/end times will cause your submission to be rejected by DCJS staff.

Under "Instructor Provider" ensure that the button next to "Official Provider/Certified Instructor" is selected.

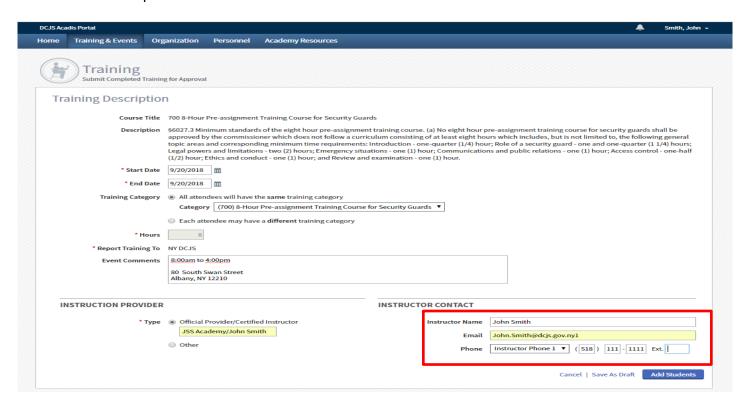
In the text box under the "Official Provider/Certified Instructor" enter the Security Guard School Name and the Instructor Name separated by a forward slash.



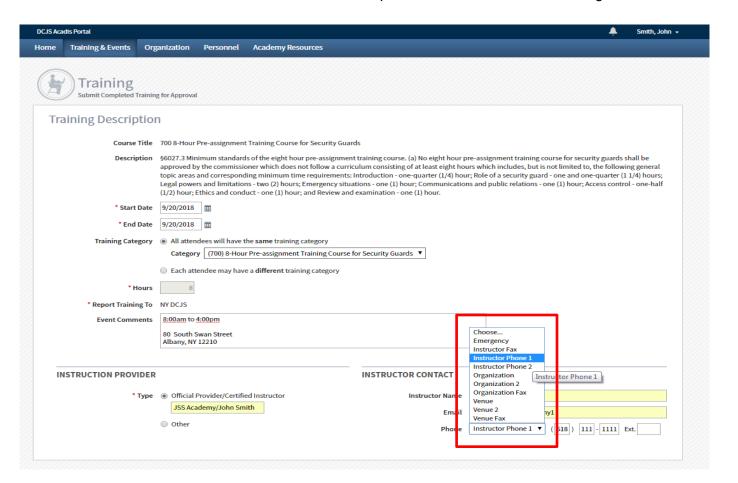
(3)

Selecting the button next to "Other" will cause your submission to be rejected.

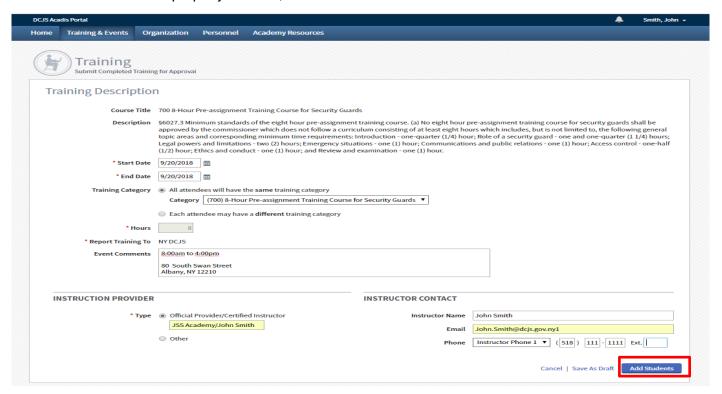
Under the "Instructor Contact" heading, enter all of the instructors names separated by a backslash. For the email and phone contact information enter that of the lead instructor.



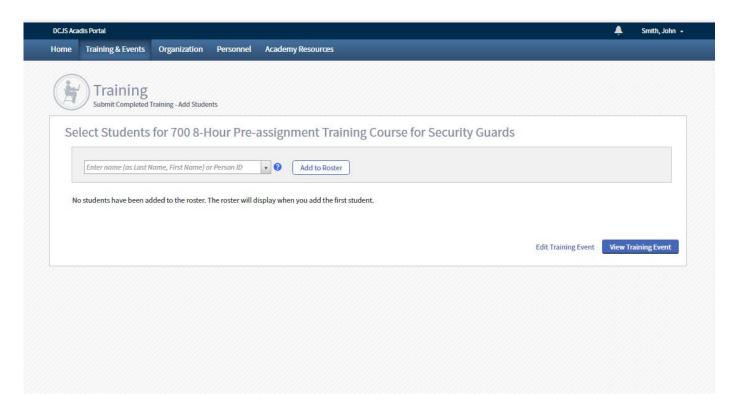
Make sure to choose "Instructor Phone 1" from the drop-down list at the "Phone" heading



If all the information is properly entered, select "Add Students" to continue.



You should now be on the "Select Students" for the course you are submitting a roster for.



IMPORTANT: To add students to a roster you will need to search for each student by their **Person ID**. A Person ID is a unique identifier assigned to every person in the Acadis system. The Person ID is always the last name, dash, date of birth entered in an eight-digit format, dash, last four of their social security number. There should be no spaces and no capitals.

If the student has a hyphenated name or a name with an apostrophe (Example: O'Grady) you should enter their name <u>without the special character</u> (Example: ogrady). The Acadis system will not recognize special characters.

See below for examples of a Person ID:

PERSON ID FORMULA:

Last Name - Date of Birth entered as MMDDYYYY - Last four of Social Security Number

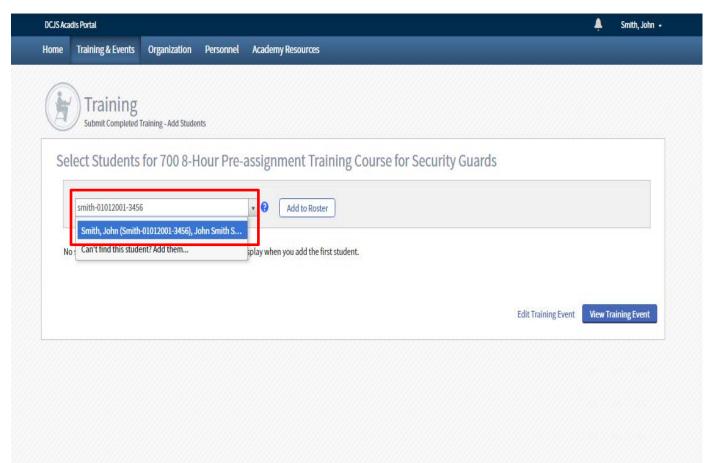
EXAMPLES:

smith-01012001-3456

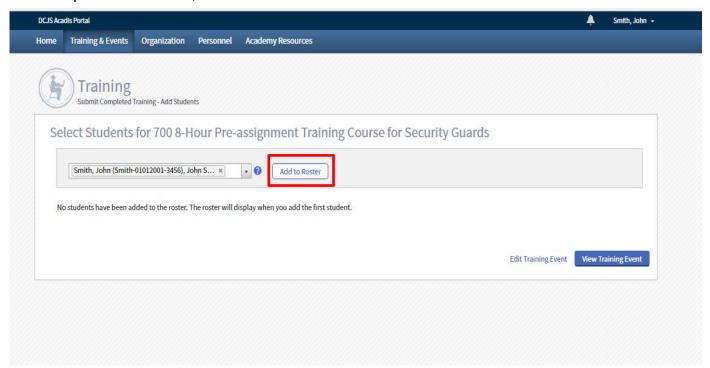
johnson-02021998-1234

ogrady-04051984-1111

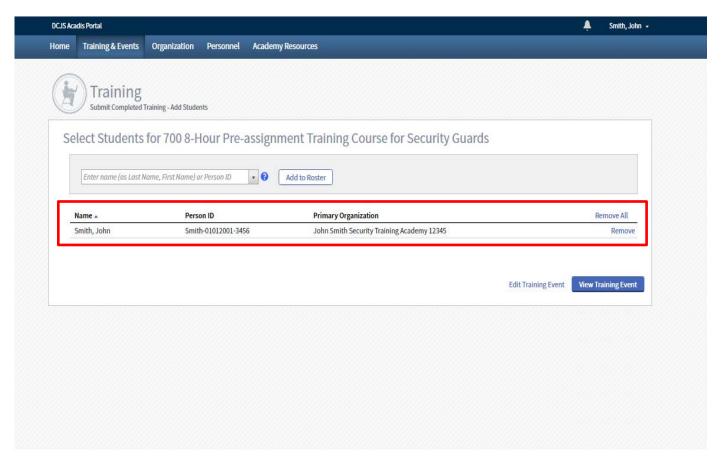
Entering the Person ID into the text field will search for the individual. When you have entered the complete Person ID, select that individual.



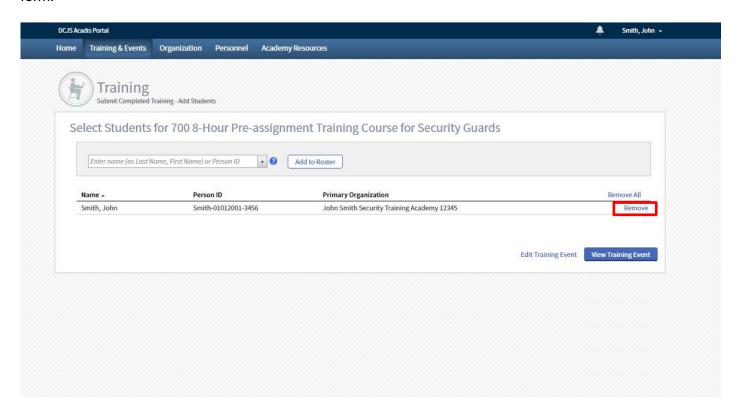
Once the person is selected, click the "Add to Roster" button



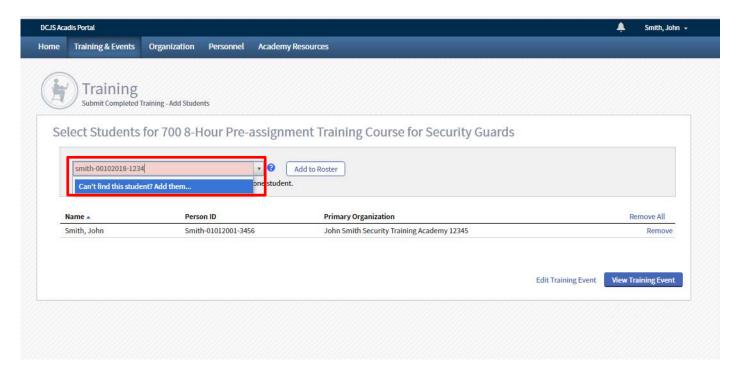
The individual should now appear on your roster. Continue to search for students Person ID's and add them to the roster.



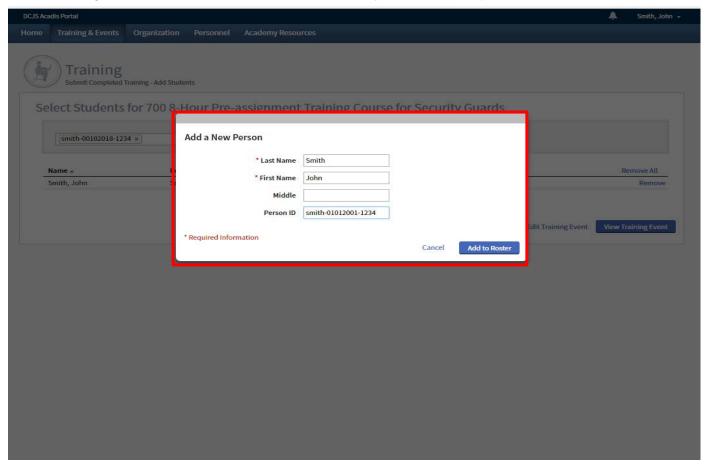
If you accidently add the wrong student to a roster, simply select "Remove" to take that name off the roster form.



If while adding students, you come across a Person ID that has not been entered into the Acadis system before, you will need to manually create a Person ID for the individual. This can be done by selecting the "Can't find this student? Add them..." option in the drop down. This option will appear when Acadis does not recognize the Person ID you have entered.



After selecting the "Can't find this student? Add them..." you will be prompted to "Add a New Person"



IMPORTANT! -Adding a New Person & Creating a Person ID —When adding a new person, you will be required to enter the persons last name, first name, middle initial and creating a Person ID for the individual.

If the student has a hyphenated name or a name with an apostrophe (Example: O'Grady) you should enter their name without the special character (Example: ogrady). The Acadis system will not recognize special characters.

As a reminder the Person ID is entered in the format of the last name, dash, date of birth entered in an eight-digit format, dash, last four of their social security number. There should be no spaces and no capitals. See below for examples:

PERSON ID FORMULA:

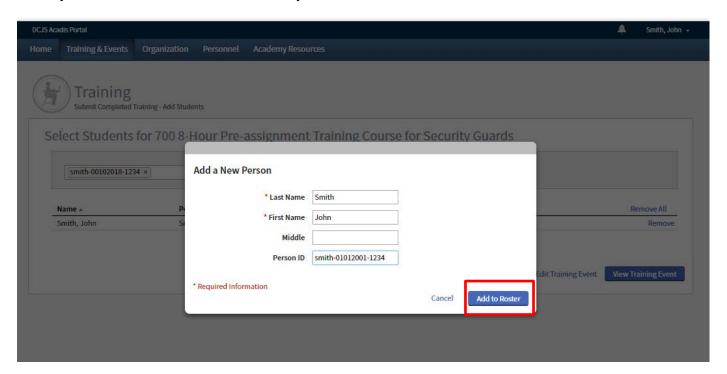
Last Name - Date of Birth entered as MMDDYYYY - Last four of Social Security Number

EXAMPLES:

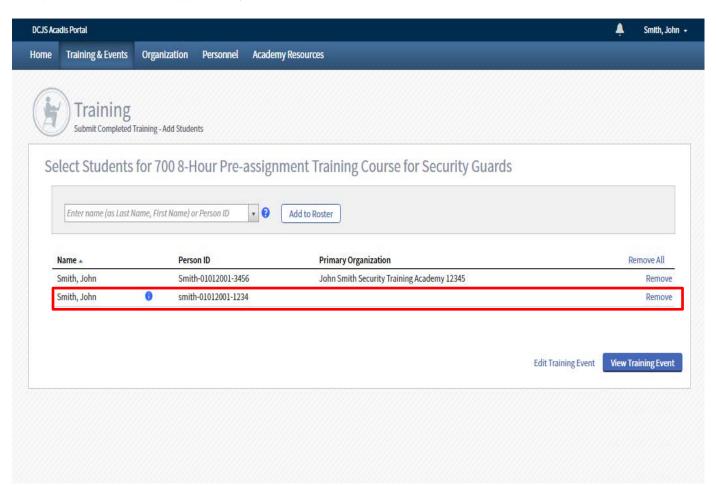
smith-01012001-3456 johnson-02021998-1234 ogrady-04051984-1111

An additional quick guide on creating Person ID's is available in the Appendix of the guide. If at any point you have an issue creating a Person ID, please contact DCJS at dcjsopssecurityguard@dcjs.ny.gov

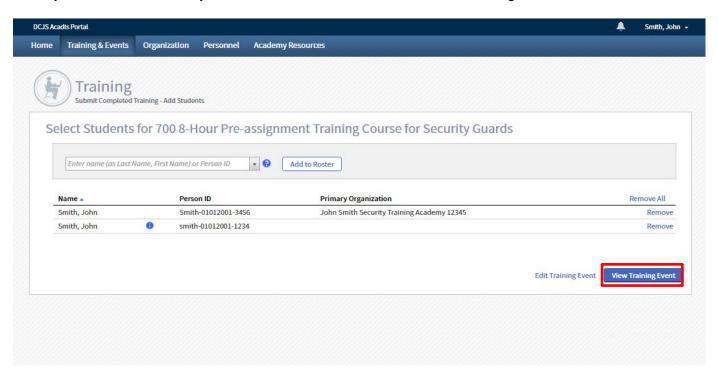
When you have entered all of the necessary information and created the Person ID, select "Add to Roster"



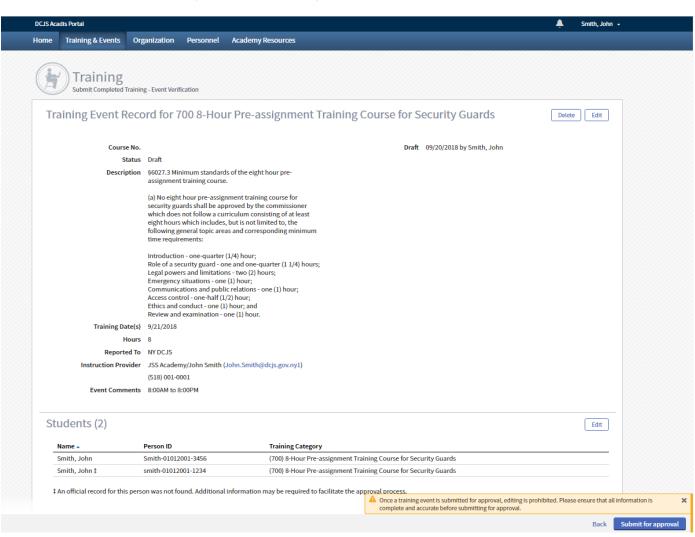
The person should now appear on your roster



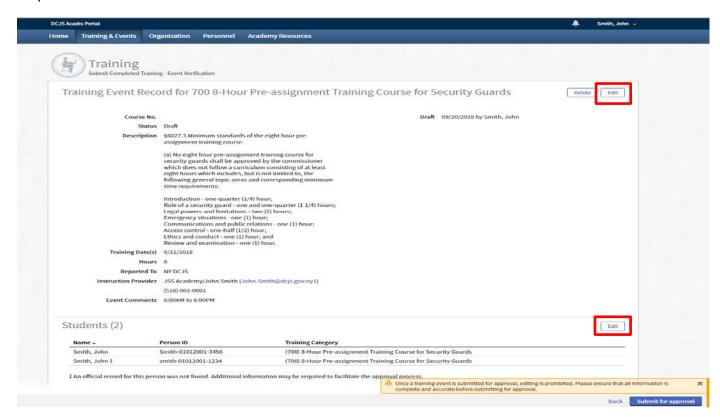
When you have entered all of your students onto the roster, select "View Training Event"



You will now be on the "Training Event Record" page

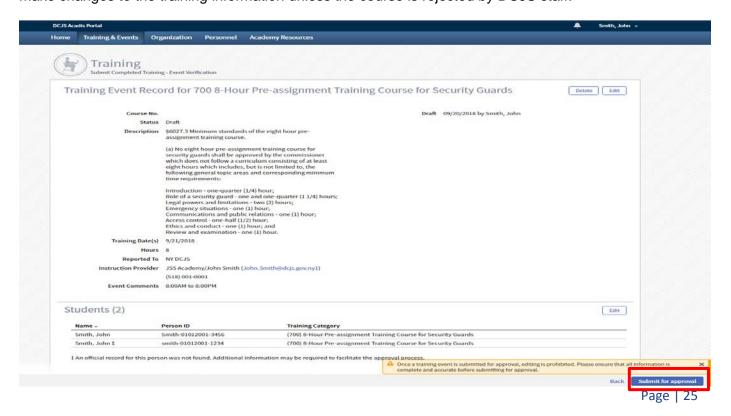


Make sure to review all of the information on this page and ensure it is correct. Submitting a course for approval with incorrect or incomplete information could cause your roster to be rejected by DCJS staff. If you need to make a correction to the course information or course roster, you can select the respective "Edit" buttons for those sections.

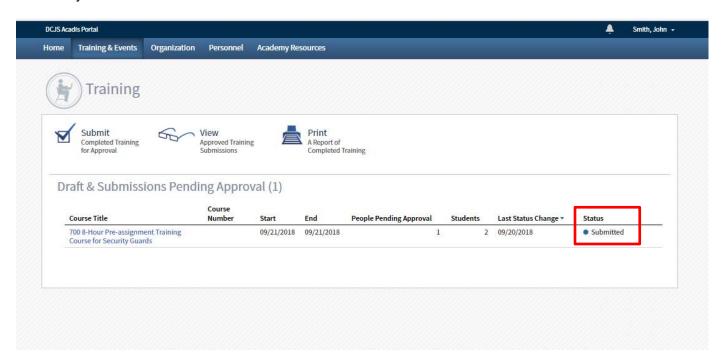


If all of the information is correct, select "Submit for Approval"

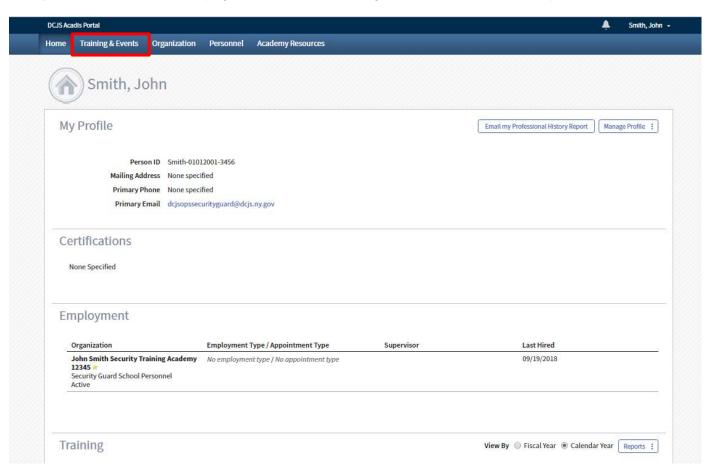
IMPORTANT: Once you submit your training for approval, you will not be able to edit or make changes to the training information unless the course is rejected by DCJS staff.



After submitting you will be taken to the "Training & Events" homepage where you can view the status of your roster.



You will need to monitor this page to receive updates on your roster status. To access this page from your Acadis Portal Homepage, click on the "Training & Events" button in the top tool bar.



You have now completed the roster submission process for security guard training programs. You should now have an understanding of how submit training events and rosters to DCJS for approval. Additionally, you should now know how to create Person ID's for individuals who are not yet in the Acadis system.

In the next section you will learn how to monitor the status of your training submissions and make necessary corrections if rejected by DCJS.

Section 3: Monitoring and Editing Submitted Courses

In Section 3 you will learn how to:

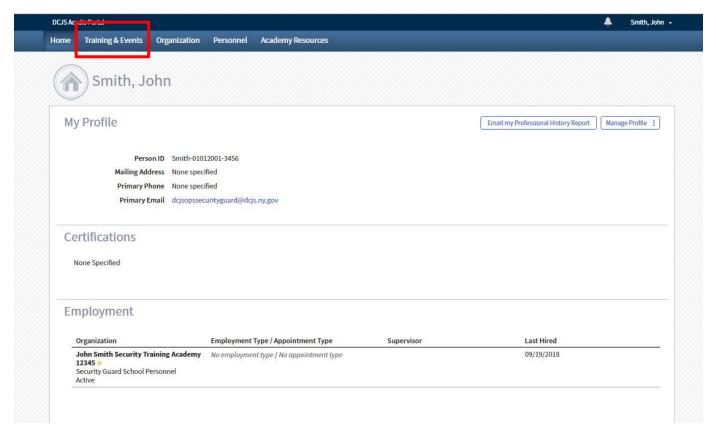
- ✓ Monitor your submitted course rosters
- ✓ Complete edits to your roster if required by DCJS

It is important to remember that you will not receive an email notification when your submitted courses are either rejected or approved. It is incumbent upon you as a Director to monitor the status of your course submissions.

Any rejected course submissions must be corrected to reflect changes requested by DCJS staff. If no edits are made and the course is re-submitted without being corrected, Acadis will automatically reject the submission again.

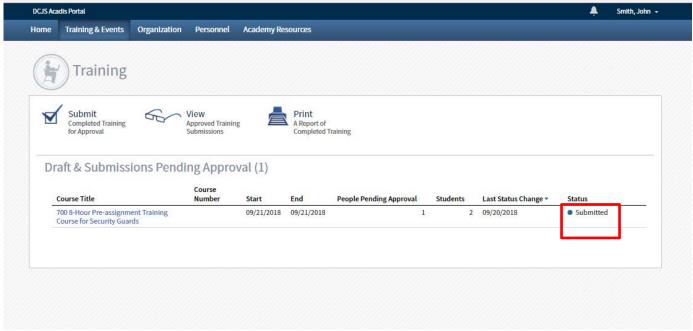
Monitoring Submitted Courses

From your Acadis Homepage select "Training & Events"

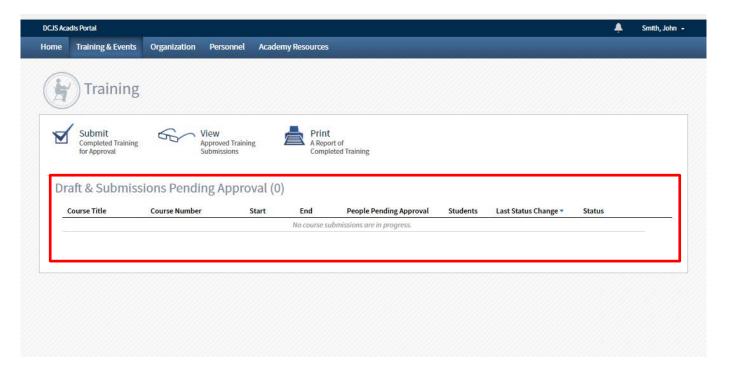


On the "Training & Events" page you will be able to view the status of your submission. The status will show one of three statuses – Submitted, Rejected or Re-Submitted.

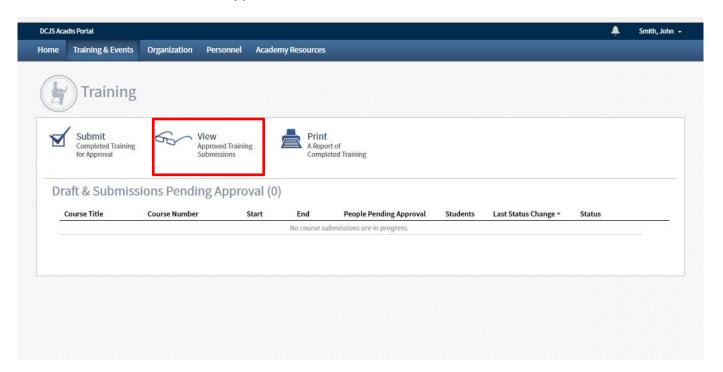
DCJS Acadis Portal Guide | Section 3: Monitoring and Editing Submitted Courses



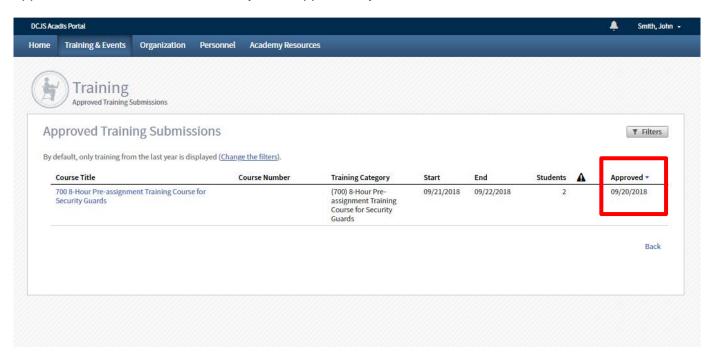
If your course is approved by DCJS staff, it will disappear from the "Training & Events" homepage



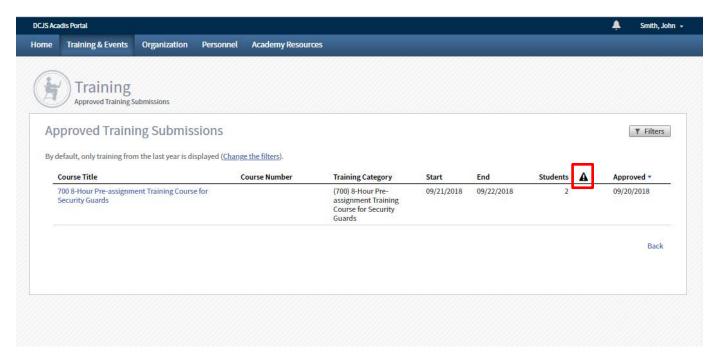
To view a course that has been approved, select "View" in the toolbar



You will now be on the "Approved Training Submissions" page. On this page you can view all of your approved courses and the dates they were approved by DCJS.

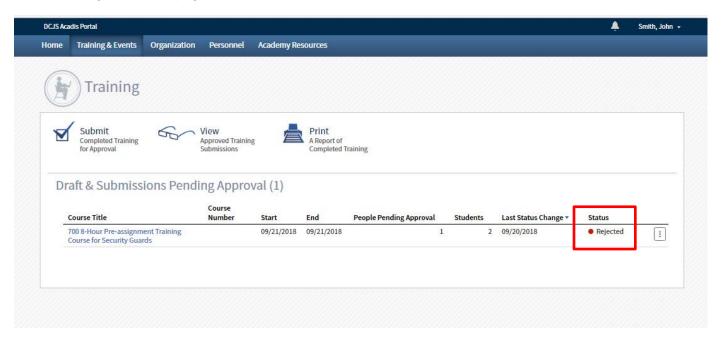


When viewing approved courses, you may notice a symbol next to the "Students" heading. This symbol means that you have entered new students into Acadis and they are pending approval by DCJS staff. Once the new students are approved by DCJS staff the symbol will disappear.

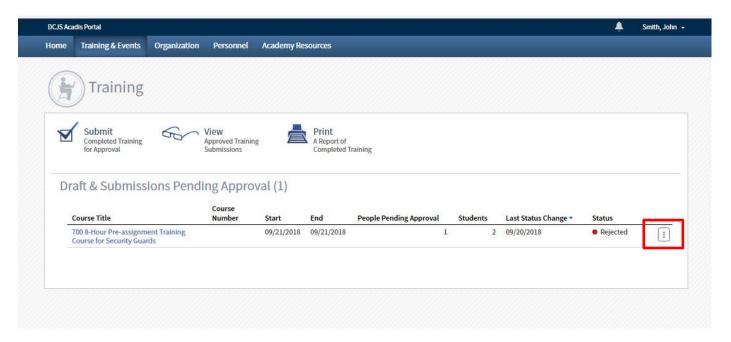


Correcting Rejected Course Submissions

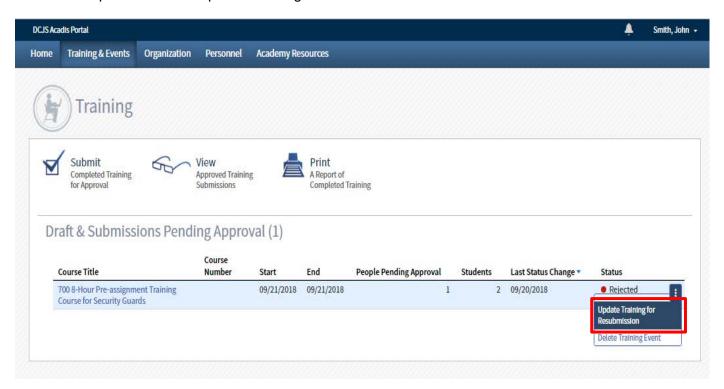
If DCJS rejects a course submission, this will show the course as "Rejected" on the status portion or the "Training & Events" page.



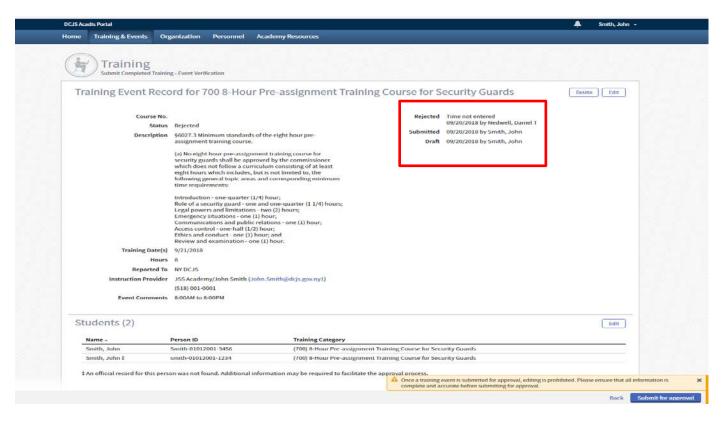
To correct a rejected course submission, select the button to the right of the "Rejected" status



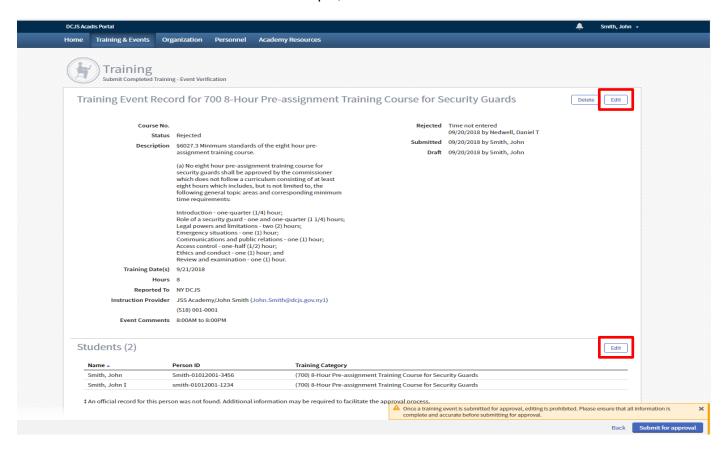
From the drop down select "Update Training for Resubmission"



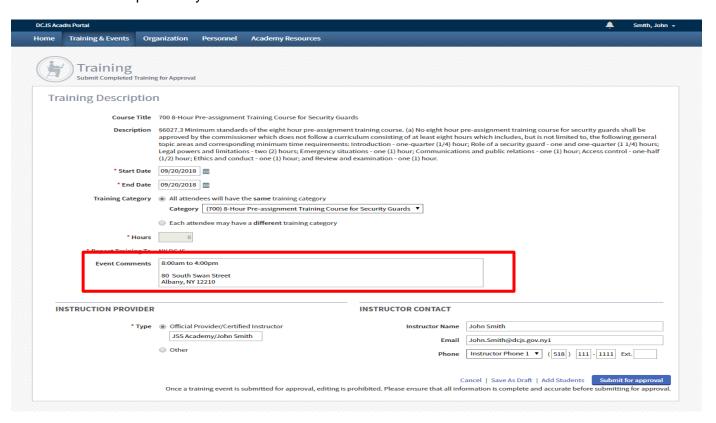
You will now be on the "Training Event Record" page. You will be able to view comments from DCJS on why your course submission was rejected.



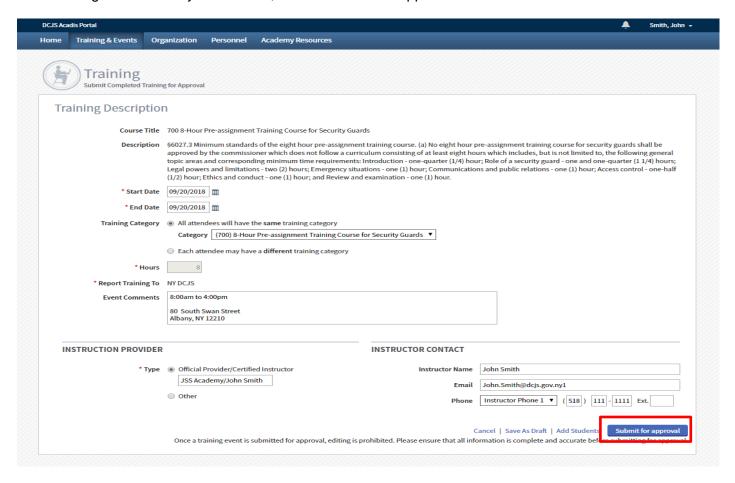
To make the necessary edits as required by the DCJS staff comments, select to edit either the course information or the course roster. For this example, we need to make a correction to the course times.



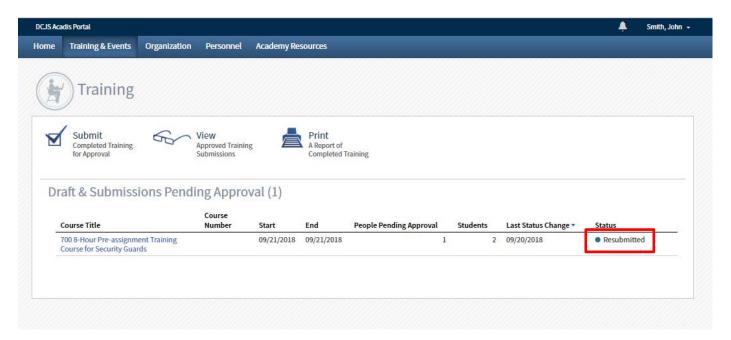
After selecting the edit button, we are taken to the "Training Description" page where we can now edit the course times as requested by DCJS Staff.



After making the necessary corrections, select "Submit for Approval"



You will then be taken back to the "Training & Events" homepage and your course will show a status of "Resubmitted"



Continue to monitor your "Training & Events" page to determine if further action will be needed or if your course roster submission has been approved.

You have now completed Section 3: Monitoring and Editing Submitted Courses. You should now know how to review your submitted courses for either approval or rejection. If rejected you should now have an understanding of how to make corrections and resubmit rosters for approval.

Congratulations! You have now completed the process of submitting course rosters to DCJS through the Acadis Records Management System. If at any point you have questions about a particular step in the process, please refer back to that section of this guide.

If you continue to experience issues, please utilize the contact information provided in the introduction of this guide.

Appendix - A

Creating a Person I.D. - Quick Guide



CREATING A PERSON I.D. – QUICK GUIDE

It is recommended you keep this sheet near the computer workstation you will be submitting rosters from.

1. What is a Person I.D.

The Acadis Person I.D. is the way the Acadis System will identify any user who has completed training with the Division of Criminal Justice Services. Any person who takes Security Guard training in New York will either have or need a Person ID.

This I.D. number will be unique to each and every person in the Acadis System. This number will also be need for course roster submissions to DCJS.

The Person I.D. is utilized to search for existing students and also will need to be created by you as a Director when inputting new students who do not show up in the Acadis system.

2. Person I.D. Formula

The Person ID is always the last name, dash, date of birth entered in an eight-digit format, dash, last four of their social security number. There should be no spaces and no capitals.

If the student has a hyphenated name or a name with an apostrophe (Example: O'Grady) you should enter their name without the special character (Example: ogrady). The Acadis system will not recognize special characters.

The Formula for creating a Person I.D. is as follows:

Last Name - Date of Birth entered as MMDDYYYY - Last four of Social Security Number

3. Examples of Person I.D.

The first example will be John Smith who has a Date of Birth of 01/01/2001 and the last four of his Social Security Number is 3456. John Smiths Person I.D. number would be:

smith-01012001-3456

The second example is Patrick O'Grady who has a Date of Birth of 04/05/1984 and the last four of his Social Security Number is 1111. Patrick O'Grady's Person I.D. number would be:

Ogrady-04051984-1111

If you are still experiencing problems creating a Person I.D. contact DCJS Staff at dcjsopssecurityguard@dcjs.ny.gov