COLORADO
Governor's Office of
Information Technology

Process for Requesting & Revoking
DYS/SB-94 Trails Access & Trails Icon for
DYS/SB-94 Security Administrators
Revised March 10, 2020

1. DYS/SB-94 Supervisors fill out paperwork requesting access for new users.
2. Once the form is completed and signed it should be sent to the designated DYS Security Administrator. They will log and track new access, profile requests and/or revocations.
3. DYS Security Administrators (SA) submit completed CDHS Access Request/OLR Form to: OIT_ServiceDesk_CDHS@state.co.us. Service Desk will ONLY accept paperwork from DCW Security Administrators. **Please Note: Paperwork needs to be completed for all Additions, Revocations, Over 90 Day Lock, and changes to profiles.**
4. Upon the receipt of a fully completed request form, signed by the supervisor, a ticket will be routed to the Access Control group in the Service Desk application.
5. An OIT Analyst will confirm compliance (form, signatures, and approval) and provision access for the specific system(s). They will set up portal access, network access, gmail, and create a Trails Oracle User ID for Legacy Trails. They will resolve the ticket when complete which will create an auto notification via email to the DYS Security Administrators (Requester) - whomever put in the ticket initially.
6. The OIT analyst will provide the Requester (DYS Security Administrator) with the username and password for the provisioned account.
7. The OIT analyst will resolve the Service Desk ticket. All information pertaining to the request including form(s) will be tracked on the ticket.
8. The DYS Security Administrator will verify training requirements are met if applicable. NOTE: It is recommended that Trails users complete Trails Training prior to receiving access to the Trails application. SB-94 users cannot be given Trails access until they have received mandatory Trails Training. SB-94 Coordinators will notify DYS SB-94 Security Administrator to request set up in Trails. The Trails Training Team will notify the DYS SB-94 Security Administrator when new users have been trained. The schedule can always be accessed from: https://my-cdhs.state.co.us/training/center/. In addition, in order to receive the Security Administrator profile the Trails Security Administrator Training needs to be completed and this profile can only be given by the **State Security Administrator** upon verification of the Trails Security Administrator Training being completed.

9. The DYS Security Administrator will provision/deprovision/modify account access, affiliations, profiles, etc. within Modernized Trails. **This includes "end-dating" the users account in Trails after the user has either left and/or transferred to another county, facility, region or JD and making sure that all "open assignments, cases and/or services" if applicable have been transferred to their supervisor and/or another user.**

10. DYS Security Administrator will notify the user and their supervisor when Trails setup is complete.

11. Any access to Medical, Mental Health and Drug/Alcohol must be approved by the specific coordinator first. This can be done via email.

Approvals for Profiles:	
Medical - Peggy Baikie	Approvals for DYS Medical profile will need go to Peggy Baikie, 303-916-1277, peggy.baikie@state.co.us
Mental Health - Gary Nitta	Approvals for DYS Mental Health profile will need to go to Gary Nitta, 303-501-5069, gary.nitta@state.co.us
Drug/Alcohol - Rochelle Galey	Approvals for DYS Drug/Alcohol profile will need to go to: Rochelle.Galey@state.co.us
SAS ID	Education Office will need to give approval for this
If you have any problems with COPS access, contact Phuong.Nguyen@state.co.us	
If you need access to the Judicial online court system, contact Renee.Amador@state.co.us	

DYS Security Administrators Tips and Tricks

If you want to add a worker to Trails in order to add their training hours (even if they will not have full Trails access), or if you want to add a staff to Trails before you get their login info, you should follow the process as you would as if you were setting up a new user. For a generic login name, please follow this naming convention: A login ID for Trails has 8 characters, so you can use something like this naming convention: TLM0001, TLM0002. The list below is the recommended numbers to use for each facility. You will just want to make note in a spreadsheet or document the last number you used. Trails will NOT let you use the same ID twice, thus the progression of numbers. This process is mainly for the facilities to use, although others can as well. It does not give the user access to Trails as there is no Oracle ID.

TLM000219	Lookout
TGM00096	Grand Mesa
TGC000208	Gilliam
TAC00036	Adams
TMV00152	Mt. View
TWF00092	Marvin Foote
TSC00066	Spring Creek
TPV00046	Platte
TZP00034	Zeb Pike

For the email address, type in xxx@xxx.com.

If you are setting up a user ahead of time before you get the login information, make sure you correct the email address and ID when you do get it from the help desk. You can usually guess the login ID and email address based on the name, but if the name is fairly common, your guess may not be correct.

Anyone in Trails can add a youth to their Caseload in Trails. The Caseload window makes it easier for workers to pull a youth into focus without going through the Name Search. For Client Managers who have committed youths on their caseload, there is more involved.

When a Client Manager leaves, the supervisor must reassign all of the youth on his/her caseload to another client manager. If a staff member from a facility or Judicial District

leaves, and he/she has youths on his/her caseload, you will receive an error when you try to enter an **"End Date"** in Trails to close them out.

There are a couple of ways around this. If you know a person is leaving, you can add it to your "exit" checklist, or whatever process you have, for that staff member to remove all of the youths from their caseload. If that isn't possible, you will need to put in a help desk ticket to have those "assignments" removed with an analyst fix. While you are waiting for the fix, you can always **"End Date"** the affiliation to your facility/JD and **"End Date"** of all of the staff's profiles, as well as "lock" the users Trails account so that they cannot access Trails before their accounts are revoked.

If you have a staff member who is transferring to another facility, region or JD, you **will still** need to submit transfer paperwork **(CDHS Access Request/OLR Form)**. For Trails, the DYS Security Administrator at the facility/region/JD **from** which the person is moving will go into Trails and **"End Date"** that affiliation and profiles. Then the DYS Security Administrator at the facility/region/JD **to** which the staff is moving to can just add the new affiliation and profiles to their own facility/region/JD.

If there are questions about what profiles a person should have, you will have the ability to look at another user in a similar position and "mirror" his/her profiles. Just a few notes that may prove beneficial to you:

1.   The DYS to CW toggle access is a State profile that will need to be assigned by someone with higher level of Security Access (like a DYS SuperUser). It will need to be assigned in the Legacy Trails Security Tool.

2.   A CYSO-I usually is assigned the Group Life profile alone, or Group Life and Admit/Release. There may be others added depending on job duties.

3.   The main profile for a client manager is Case Management, and most client managers have the DYS Access to CW toggle profile as well.

4.   The majority of Facility Directors and Assistant Directors, as well as client manager supervisors and Regional Directors have the Director's Office profile. This gives read and edit ability to everything in Trails for DYS except for Medical, Mental Health, and Drug/Alcohol.

5.   Central Office managers all will have the Director's Office profile as well.

6. The main profile for Assessment staff is Commitment Assessment, although most also have the Mental Health profile and the DYS to CW profile.

7. The SAS ID and Course Creation profiles are only for a select few workers. The Education office would need to give its approval for this.

8. School staff only need the Education profile, unless they will be doing entry into the Group Life area.

9. You should not have to do anything with the DYS IV-E Determination Worker, Client Merge Worker or Restricted Reports. The Restricted Reports profile is mainly for the DYS Research Unit.

10. Very few requests come in for the Read-Only profile. If they do, they are usually contractors or possibly audit teams that need the access, and this request will most likely come from Central Office.

11. The COPS profile to access the court system via CICJIS (in the portal) also needs setup in a particular network group, so that will need to be requested on the access paperwork before you can add the profile.

12. SIDMOD maintenance is used by only a few people as well, and I don't believe you will need to give this access either at this time.

13. Do not give the MH profile alone because there will be problems. If someone only requests MH always add Group Life as well.

14. The other profiles are pretty straight-forward, and you shouldn't have any issues.

15. In many instances, especially with ROP, many profiles are requested. I usually start out giving Admit/Release and Group Life, and if additional access is needed, they can let you know. You can handle this however you feel is best. I would rather start with lower level access than giving someone everything if they don't need it. Nine out of ten times I don't hear that they need anything else.

16. SB-94 users only receive the SB-94 profile, and possibly the DYS Access to CW toggle profile. For particular Judicial Districts, a SB-94 user may have multiple affiliations.

17.   Please be sure to indicate a Primary Affiliation. It is not required and it is defaulted to No, but every staff person needs a primary affiliation.

Add Affiliation

Administrative Office

| Yes | **No** |

Region

[⌄]

Judicial District

[⌄]

Facility

[⌄]

Unit

[⌄]

Primary Affiliation

| **Yes** | No |

Start Date*

[MM/DD/YYYY   📅]

End Date

[MM/DD/YYYY   📅]

| Cancel | Add |