**Licensing Policy and Procedures**

**Handbook Revision \_\_**

This revision of the Licensing Policy and Procedures Handbook was published on \_\_\_\_. Summaries of new or revised items are provided below.

For Licensing revisions only: Immediately following signoff, Licensing staff will prepare a highlighted document showing significant changes that we will post with the revision memo.

CLASS Roles and Functionality (PATS 7737)

The appendix below is revised to more accurately reflect roles and associated functions in CLASS. More specially, the role of Technical Assistance Librarian (TA Librarian) and State Office were removed from this appendix. The role of District Director was moved to the second chart of additional roles, and hand held devises were removed from the appendix.

Display of Revisions with Changes Highlighted (Word Document)

See:

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## Appendix 1000-3: Security Roles and Functions in CLASS

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The tables below show the core roles and the additional security roles available in the CLASS system.

• [Core Roles](http://www.dfps.state.tx.us/handbooks/Licensing/Files/LPPH_px_1000_3.asp#core)

• [Additional Roles](http://www.dfps.state.tx.us/handbooks/Licensing/Files/LPPH_px_1000_3.asp#additional)

Core Roles

Each Licensing employee is assigned only one core security role. Core security roles are successive, meaning that each role includes the permissions of a preceding role and provides additional permissions.

| Core Role | Summary | CLASS Functions |
| --- | --- | --- |
| View Only | • No role assigned  • No ability to modify data | View most pages in CLASS.  Exceptions:  • Pages that are only used to create records in CLASS are inaccessible to View Only users; for example, Batch Administration, Intake Report, and Application Exemption Request. |
| Administrative Technician | Provides the functionality assigned to View Only, plus the functions described in the Functions column to the right. | • Application – Create a new facility record. View and assign applications, including online applications (known as eApps)  • Case Assignment List – Assign or transfer cases  • Exemption Request – Create a record for a new exemption request  • Background Check Person Search – Request a background check  • Background Check Results – Document information related to background check results  • Background Check Results History – Create background check letters  • Intake Report – Create an intake report  • Designees – Add a designee  • Chronology – Create chronologies in any facility record  • User Request – Create User Request reports  • Case File Print – Create Case File Print reports  • Update/Query Payments – Update payment records  • Payment Verification – Update and delete payment records  • Training Session Information – Add or update training sessions  • Training List – View scheduled training sessions  • AH Reports – View and assign inspections of agency homes |
| Licensing Representative | Provides the functionality assigned to the role of Administrative Technician, plus the functions described in the Functions column to the right. | • Operation Main – Update facility information in an assigned caseload  • Inspection/Assessment List – Create or modify inspections for operations in an assigned caseload  • Inspection/Assessment List – Create or modify assessments for operations in an assigned caseload  • Investigation Main – Update open investigations in an assigned caseload  • Waiver/Variance – Add a waiver or variance to operations in an assigned caseload  • Enforcement Recommendation List – Select an action based on enforcement recommendations for an operation in an assigned caseload  • Provider Corrective Action Plan – Create or update corrective action plans for an operation in a caseload  • Provider Adverse Action Involuntary Suspension – Create or update an adverse action for an operation in a caseload  • Provider Adverse Action Revocation or Denial – Create or update an adverse action for an operation in a caseload  • AH Reports – Access or conduct assigned inspections of agency homes |
| Supervisor | Provides the functionality assigned to the role of Licensing Representative, plus the functions described in the Functions column, to the right. | • Waiver/Variance – Approve or deny waivers and variances  • Inspection Details – Reopen or delete an inspection when all drafts and final versions of forms or letters have been deleted  Note: Only for inspections that are not the basis for either a corrective action, an adverse action, or a plan of action may be deleted  • Assessment Details – Reopen or delete an assessment when all drafts and final versions of forms or letters have been deleted  Note: Only assessments that are not the basis for a corrective or adverse action or a plan of action may be deleted  • Investigation Main – Reopen or delete an investigation when all drafts and final versions of forms or letters have been deleted  Note: Only investigations that are not the basis for a corrective adverse action or a plan of action may be deleted  • Intake Report – Delete an intake record when it is not attached to an investigation or inspection  • Investigation Conclusion – Document approval to extend an investigation beyond the usual time frames  • Issuance – Document approval and justification to extend an application period, specifically the initial permit, beyond the usual time frames  • Add/View Chronology – Delete a chronology that was entered manually  • Investigation Perpetrator Details – Complete the Due Process section for alleged perpetrators  • Provider Corrective Action Plan – Enter a supervisory decision.  • Provider Adverse Action Involuntary Suspension – Enter a supervisory decision  • Provider Adverse Action Revocation or Denial – Enter a supervisory decision  • CLASSMate Usage Monitoring – View records that are checked in and out of CLASSMate  • Enforcement Recommendation List – Enter a supervisory decision for the action recommended by the inspector based on the enforcement recommendations  • User Profile (Accessed through the Security tab) – View other employees’ To-Do tasks in CLASS  • Operation Main – Update the name and address of an operation  • Governing Body – Update the name of a governing body  • Inspection/Assessment List – Add inspections and assessments to any caseload  • Background Check Assignment – Assign an operation to a CBCU specialist |

Additional Roles

Requests for additional security roles are considered individually, based on the business need.

| Additional Role | Summary | CLASS Functions |
| --- | --- | --- |
| District Director or Manager | The District Director or Manager provides the functions described in the *Functions* column to the fight. | • Provider Adverse Action Revocation or Denial – Access the Voluntary/Relinquish Withdrawal check box and Reason text box  • Operation Main – Reopen a closed operation  • Operation Main – Access the Do not display on the public/provider website check box  • Application/Closure – Change the decision made on an application  • User Request Reports – View an At Risk Facilities Report |
| Administrators’ Licensing System (ALS) | Provides all of the functionality assigned to the role of Licensing Inspector, plus the functions described in the *Functions* column to the right | Add and modify information about a licensed administrator |