

CANVaS



Virginia CANVaS System User Manual

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Terms Used

Here are some of the terms used in connection with CANVaS and what they mean:

- **Administrator** – has full permissions and rights within the CANVaS system
- **Assessment** – a questionnaire used as a tool to assess and evaluate a consumer
- **CANS** – the Child and Adolescent Needs and Strength tool
- **Close an assessment** – save and permanently store an assessment. A closed assessment cannot be modified.
- **Consumer** – is the patient or child being assessed
- **Locality** - the office, agency or contracted company doing the assessment
- **Provider** – same as locality
- **Save an assessment** – a saved but not closed assessment is saved for future editing but not closed. A closed assessment cannot be modified.
- **User** – the case manager or person using CANS to assess the consumer
- **User Administrator** – a person who has elevated rights in the CANVaS system to perform some administrative tasks

Purpose of Document

This document contains training information on use of the CANVaS website. CANVaS is the electronic version of Virginia’s Child and Adolescent Needs and Strengths (CANS) assessment. The CANS was developed by John S. Lyons, Ph.D. and has been adapted for use in numerous localities, states and countries. An interagency workgroup in 2007 and 2008 revised Indiana’s version to better meet Virginia’s need for a uniform assessment instrument for children and families served by the Comprehensive Services Act (CSA). CANVaS, the web-based application, is a modification of the Indiana Behavioral Health System software.

The intended audience for this document is all CANVaS users. CANVaS users will be employees of local Departments for Social Services (DSS), Court Services Units (CSU), Community Services Boards (CSB); and school systems who are working with children, youth and families served through the Family Assessment and Planning Team (FAPT) process to receive CSA funded services.

CANVaS contains the electronic version of the CANS Comprehensive, ages 5-17 and the CANS Reassessment, ages 5-17. These two assessments are the only ones required for use by CSA.*

The design of CANVaS enables use of common tools and processes by any local or state government agencies. Implementing the CANS tools in the website will allow consistency, uniformity and will enable all who are involved in CSA services to be “on the same page’ and “speak the same language” regarding the child and family’s needs and strengths.

* A Virginia CANS paper version of both the Comprehensive and Reassessment tools for children ages birth to 4 may be found on both the CSA website and the Communimetrics training site; however these assessments are not required by CSA.

Registering with CANVaS

To maintain the security and privacy of data, the application requires a username and password to be set up. This is done through a registration process that enables local government agencies to identify who users are and how they are to interact with CANVaS. Each local government agency must designate authorized users who will be issued a username and password by the Administrator. Three levels of authorized users are possible:

- **Case Managers:** These users have access to both CANS tools (a Comprehensive tool and a reassessment tool for children ages 5 and up). These users have access to the online assessment tools through the interview and rapid-entry modes, but not to the import/export feature of CANVaS. Case Managers have access to all locality reports for their organization.
- **Data Entry/Import and Export:** These users have access to the import/export feature and to the data entry modes. They do not have access to online CANS assessment tools.
- **Read-Only/Management:** These users can view all data specific to the local government agencies. They do not have access to the CANS tools or the import/export feature. These users have access to all reports for their government agencies.

CANVaS registration documents are located: <http://canvas.csa.virginia.gov> . Please submit your hardcopy certification along with the registration form, not doing so will result in delay of creating your user account.

CANVaS Website Description

The CANVaS website is described by grouping parts of the website into sections that provide specific functionality (e.g., searching for a consumer). The security and access to different parts of the website is maintained by the CANVaS Help Desk and implemented in the website “behind the scenes”. That is, different users will be able to access different parts of the website based on the security profile that is created during the registration process. In fact, some users may have different menu options than others. The CANVaS Help Desk is available and can be emailed at CANVaSHelpDesk@rcrtechnology.com or can be called between the hours of 8 AM and 5 PM toll free at (877) 727-8329 for assistance.

The following sections describe each section of the website in more detail. To provide general information about CANVaS and be a central place for relevant documents, the home page, news and documents pages are available to anyone on the Internet. This area will be expanded as appropriate, but will always contain the official and current versions of all the assessment tools as well as current training options. The web address or URL is: www.canvas.csa.virginia.gov . Figure 1 below shows the CANVaS Home Page layout.

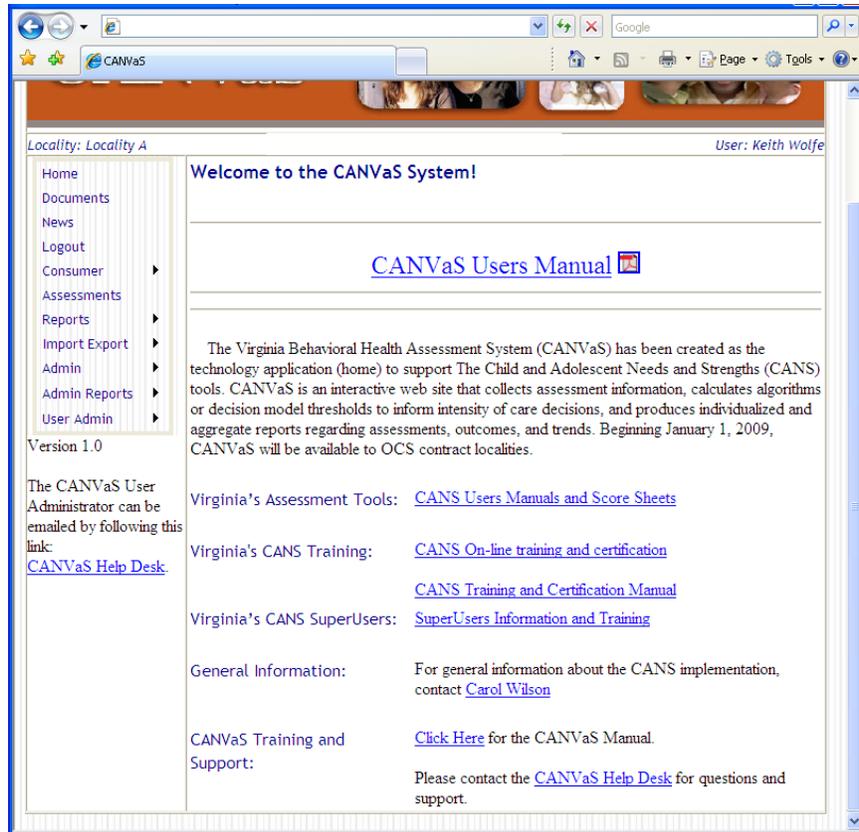


Figure 1 – Home Page

Logging In

Your username and password are determined during the registration process and additional details are contained in that documentation. If there are questions regarding your username, password or user profile, contact the CANVaS Help Desk at CANVaSHelpDesk@rcrtechnology.com or the CANVaS help Desk can be called between the hours of 8 AM and 5 PM toll free at (877) 727-8329. (Figure 2 below illustrates the website login page)

Secure Logins

Logging in uses 128-bit encryption and once logged in all data transfers are encrypted, so no one will be able to access any web pages without being officially logged in.



Figure 2 – Login Page

How to handle a forgotten password

There are two ways to handle a forgotten password:

1. On the login page, a link is provided to retrieve a forgotten password. If you have forgotten your password for the CANVaS login you can follow these steps:
 - Click on “**Forgot Password?**” and enter your username. If you entered your username to login, it will be already displayed.
 - Click the “**Submit**” button.
 - Your “Secret question” will display. This question and answer were selected by you when your CANVaS account was created.
 - Enter the “Secret answer”.
 - Click the “**Submit**” button.
 - Once the username and secret answer are both correct, an e-mail is sent to the user email address that was entered in the user profile during the registration process.

Note: If either the username or answer to the secret question is incorrect, the following message displays on the page, “Please try again or contact the CANVaS Help Desk. The CANVaS Help Desk can be contacted toll free at (877) 727-8329 or emailed at “CANVaSHelpDesk@rcrtechnology.com”.

How to log out

The “Log Out” menu item should be used when you are finished working in CANVaS. This maintains appropriate security for the data. However, you will be automatically logged out after a short period of inactivity. If you should be automatically logged out, click the Logout button on the menu and then login again.



Figure 3 – the Logged Out Screen

General Page Layout

All pages in the website follow the same basic layout. See Figure 4.

- Just above the menu area and below the banner is an area that displays your username and locality. The center of this section is reserved for short messages. A typical message is a reminder the user needs yearly CANS recertification. Specifically, this reminder displays 30 days prior and 30 days after the user’s CANS certification expiration date. In figure 4 there is a message indicating the user’s certification will expire in 21 days. Other messages may be developed in future phases.
- On the left side of each page, you will find the navigation menu.
- At the bottom left underneath the menu area, the version number of the website displays along with a link to email the CANVaS Help Desk.
- The area to the right of the menu displays the content for selected menu item.
- If the logged in user has any assessment coming due or recently overdue a button labeled Past Due Assessments will appear.

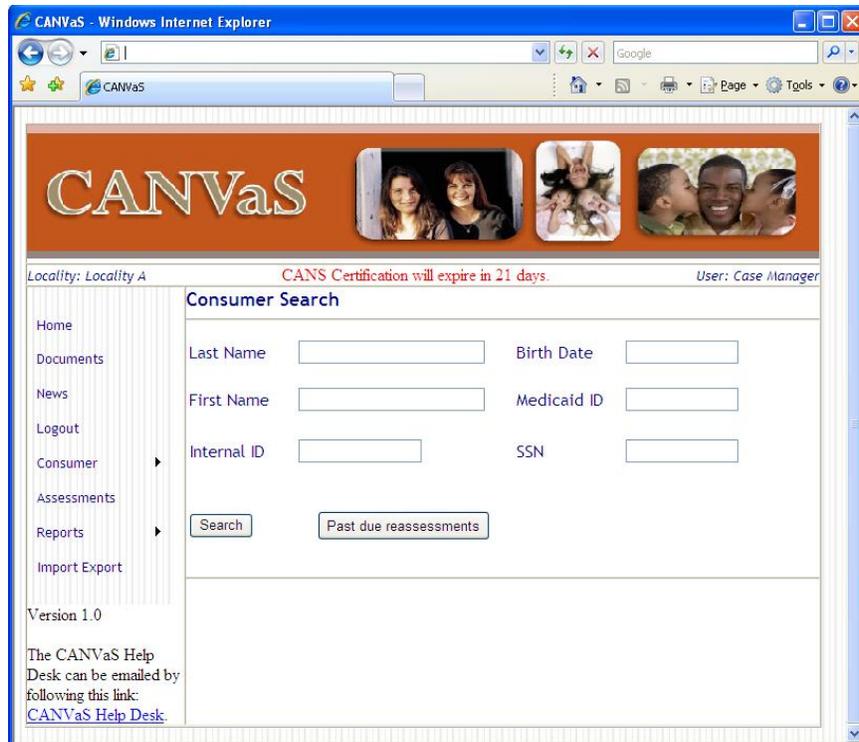


Figure 4 – the Consumer Search page,
-note the locality, login name, and message section

When developing the website, it has been sized to accommodate many different screen resolutions. Therefore, a page may have more or less space to the right depending on the user's display options. Also, this menu is dynamic in that various options will be visible based on your profile. Therefore, it is possible for two different users working with the same organization to see different menu items.

Depending on your display settings, some reports may extend off the right-hand edge of the display area. To correct this adjust the text size of the size of the text using the dropdown box at the top of the report.

Consumer Administration

After a successful login, the Consumer Search page displays. Always search for a consumer before adding the consumer's information, to avoid possible duplicates.

How do I find a consumer

To locate a consumer's records, you can search on several different pieces of data, in combination or separately. When you enter the criteria into the text box (e.g., entering information into the "Last Name" box) and click the "**Search**" button, all matching consumers the user is allowed to view will be displayed. To protect consumer privacy, the search feature finds only the consumers that match your

local organization. The most accurate search is on one of the unique IDs: Internal ID, or SSN. You may search on one or all of these fields:

- Last Name
- First Name
- Birth Date
- Medicaid ID
- Internal ID
- SSN

After you have entered your search criteria click the **“Search”** button. Sample search results are shown in figure 5 and figure 6.

Search results display all consumers matching the criteria from your locality. Therefore, if there are two “Robert Smith’s” both will display. If Robert Smith is in CANVaS under a different organization or locality the record will not be viewable and therefore not be displayed. The search criteria also searches for similar names (to account for misspellings and/or key transpositions).

The initial display includes: Last Name, First Name, Birth Date, and OASIS/DJJ/DOE #. If the consumer is not displayed, you can enter different and/or additional information and search again. Click the **“View”** button to display the selected consumer’s demographic information to verify the correct consumer is chosen and view a summary of the consumer’s assessment history (e.g., visit date when the assessment was performed, specific assessment tool used and whether the assessment is “open” (not completed) or “closed” (completed)).

From “View Consumer”, you have the option to either edit the consumer demographic information or to add a new assessment. If the consumer has any assessments you will also have the option to view the assessment. (See figure 5.)

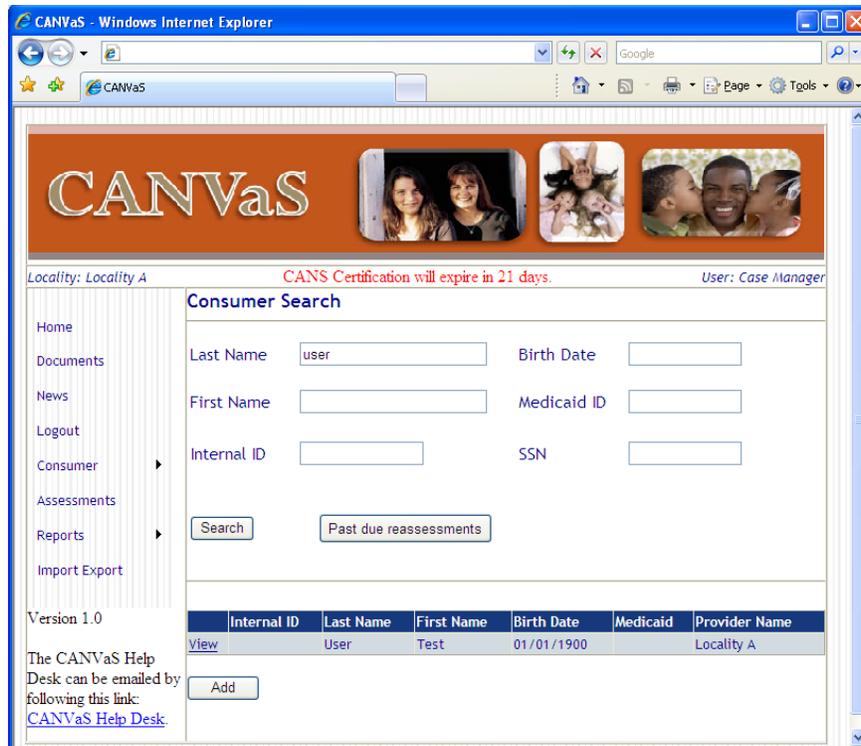
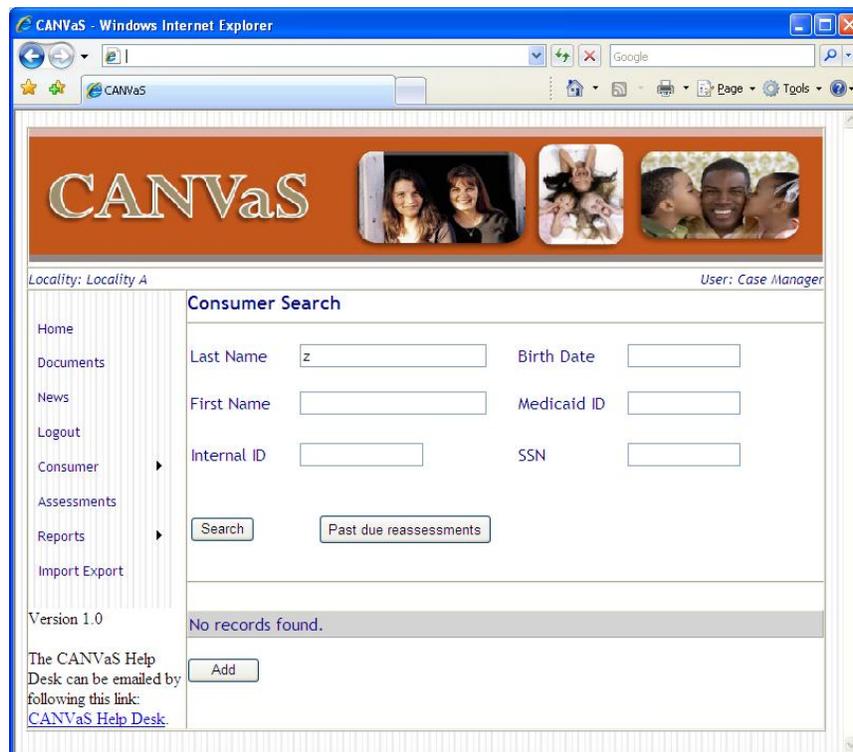


Figure 5 – a successful consumer search,-this consumer had an existing assessment.



**Figure 6 – an unsuccessful consumer search-
this consumer has no records in CANVaS at this locality**

How do I add a Consumer

To add a consumer:

1. Login using an account having permission to add new consumers. The login will take you directly to the Consumer Search page.
2. Enter the consumer's last name or some other information to search on and click the **"Search"** button to begin the search for all consumers with matching information. This is done to ensure the consumer isn't already in the system. (See figure 6 above)
3. If there are no matches for your consumer the search will say **"No records found"** and you can click the **"Add"** button to add your consumer to the system. However, if the search returns matches to your search criteria ensure none of the matches are the same consumer and, if necessary, add the consumer to the CANVaS system. If one of the matches is the same consumer select the consumer from the list.
4. If you did not find the consumer in the search click the **"Add"** button to bring up the **"Add/Edit Consumer"** screen as shown in figure 7 below. Enter the information you have for the new consumer.
REMINDER: As stated above, some information is required to create a consumer.
5. Click **"Insert"** to create the new consumer in the CANVaS system. Click **"Cancel"** to cancel the creation process.

The screenshot shows a web browser window titled "CANVaS - Windows Internet Explorer". The address bar shows "Google". The page header features the "CANVaS" logo and three small images of people. Below the header, the page is titled "Add/Edit Consumer". The form contains the following fields and values:

| | | | |
|----------------|--|------------------------------|---|
| Last Name: | Doe | First Name: | Jane |
| Middle Name: | Sue | Birth Date: | 01/01/2001 |
| Gender: | <input type="radio"/> Male <input checked="" type="radio"/> Female | SSN: | 000-00-0000 |
| OASIS\DJADOE#: | 123 | Planned Permanent Caregiver: | Mom Doe |
| Relation: | Mother | Zip Code: | 00000 |
| Race: | <input checked="" type="checkbox"/> African American <input checked="" type="checkbox"/> American Indian <input checked="" type="checkbox"/> Asian <input checked="" type="checkbox"/> Caucasian | | <input checked="" type="checkbox"/> Native Hawaiian |
| Ethnicity: | Unknown | | |

At the bottom of the form, there are two buttons: "Insert" and "Cancel".

Figure 7 – adding a new consumer to CANVaS

How to edit consumer information

To edit an existing consumer:

- Search for and find the desired consumer
- Click the **“Edit”** button to change or add information about the consumer
- Click the **“Update”** button to save the information
- Click the **“Cancel”** button if there are no updates or to discard changes not yet saved

No records found

If the consumer search is unsuccessful, “No Records Found” will be displayed. (See Figure 6) This means the consumer you searched for is not in the system yet for your locality and will need to be added.

How to add a new consumer

To add a new consumer:

- Click the **“Add”** button
- Enter the new consumer’s information
- Click the **“Insert”** button to save the information.

Click the **“Cancel”** button to cancel the add consumer process and not save the entered data. Once a consumer has been added to the system they may have changes made to their consumer data section but cannot be deleted from the system.

What if the consumer has been assessed at a different locality

If a consumer has indicated an assessment has been made at a different locality, please contact the CANVaS Help Desk for instructions on how to acquire the assessment(s).

How to merge consumers

If it is discovered a consumer is in CANVaS under more than one ID, perhaps with different spellings or the consumer may have been entered separately by users at different locations, the records must be merged into one record. (See figure 8). Only a CANVaS administrator can merge consumers.

To merge a user’s records:

1. Login as an Administrator
2. In the left-hand menu click **“Admin”** > **“Consumer Merge”**
3. Enter the two BHAS IDs repeating to the two consumer accounts and click **“Start”** to begin the merge. Ensure the BHAS ID containing the consumer record you want to remain is entered as Master BHAS ID.

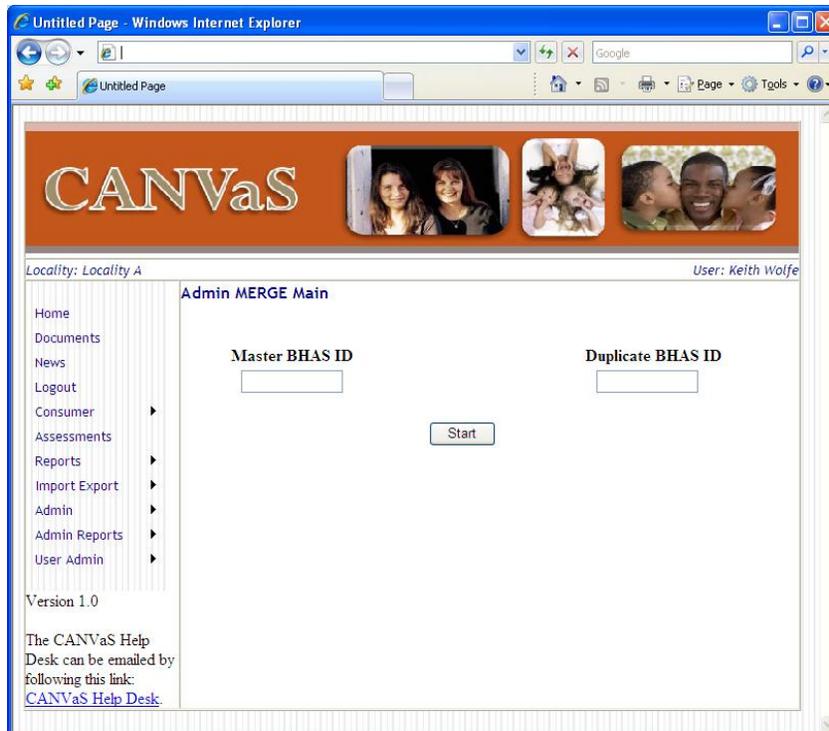


Figure 8 – merging consumers

Consumer Demographics

Consumer demographics are straightforward, whether in “Add” or “Edit”. However, there are a few items to note when entering this information. See figures 9 and 10.

- Last Name (**required**)
- First Name (**required**)
- Middle Name
- Birth Date (**required**)
- Gender
- Zip Code
- SSN – (**required**) the format is: ###-##-####.
- OASIS/DJJ/DOE# (**required**)
- Planned Permanent Caregiver (**required**)
- Relation – (**required**) this is the relation of the Planned Permanent Caregiver, such as, mother, aunt, sister.
- Ethnicity – Following federal Census Bureau standards, Hispanic ethnicity is separate from the consumer’s race.
- Race – The options given are consistent with the Census Bureau standards and allow the consumer to identify multiple races if it is applicable (e.g., part Asian and part Caucasian).

This assists with integration to/from locality’s electronic medical record or case management systems. While it is not a requirement to enter data into this field on this web page, it is highly recommended that the appropriate data be entered for each consumer. If there are questions regarding the use of this field and data, please contact the CANVaS Help Desk.



Figure 9 – consumer input errors - the required fields are not filled out



Figure 10 – a successfully added consumer

Assessment Administration

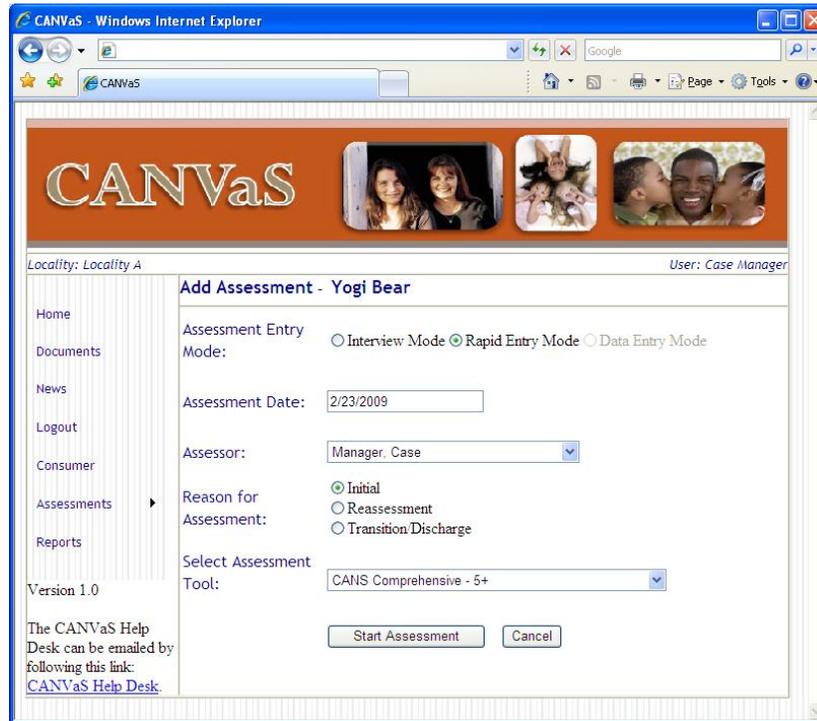
How to add an assessment

Once the consumer is either found or added to the system, you can add an assessment. When adding an assessment, the consumer's name displays as part of the heading for this section. This helps you verify you are working on the correct consumer. (See figure 11)

To add a consumer assessment:

1. Search for and find the consumer. If the consumer does not exist in the CANVaS system add the consumer.
2. Click on the **"Add Assessment"** button at the bottom of the search. You must complete the Assessment Options (some options may be disabled or 'grayed out' based on your user profile).
3. Select or enter the following:
 - a. the desired entry mode for the assessment
 - b. the assessment date
 - c. the assessor
 - d. the reason for the assessment
 - e. the assessment tool used
4. Click the **"Start Assessment"** button

The next pages display the necessary questions and answer options based upon the criteria selected. Each button corresponds to a section/domain of the assessment. The assessment can be canceled, saved or closed using the buttons at the bottom of the page. If the **"Process/Save Assessment"** button is clicked and the **"Check to close assessment"** box is not selected, the assessment will be saved and may be resumed at a later time. **IF the "Check to close assessment" box is selected and the "Process/Save Assessment" button is clicked, the assessment will be closed and will not be modifiable in the future.** See figure 14 for visual detail on the checkbox and save button.



The screenshot shows a web browser window titled 'CANVaS - Windows Internet Explorer'. The page header features the 'CANVaS' logo and three small photographs of people. Below the header, the page is titled 'Add Assessment - Yogi Bear'. The form includes the following fields and options:

- Assessment Entry Mode: Interview Mode Rapid Entry Mode Data Entry Mode
- Assessment Date: 2/23/2009
- Assessor: Manager, Case
- Reason for Assessment: Initial Reassessment Transition/Discharge
- Select Assessment Tool: CANS Comprehensive - 5+

At the bottom of the form are two buttons: 'Start Assessment' and 'Cancel'. A sidebar on the left contains navigation links: Home, Documents, News, Logout, Consumer, Assessments, and Reports. The footer of the sidebar mentions 'Version 1.0' and provides a link to the 'CANVaS Help Desk'.

Figure 11 – adding an assessment

Assessment entry modes

Rapid Entry Mode

This option assumes that the clinician has completed the assessment instrument on paper. This option provides a more compact and quicker method of data entry. When adding a new assessment, if you accidentally select Rapid Entry Mode, you can click the “Interview Mode” button at the bottom of the page. (See figure 12)

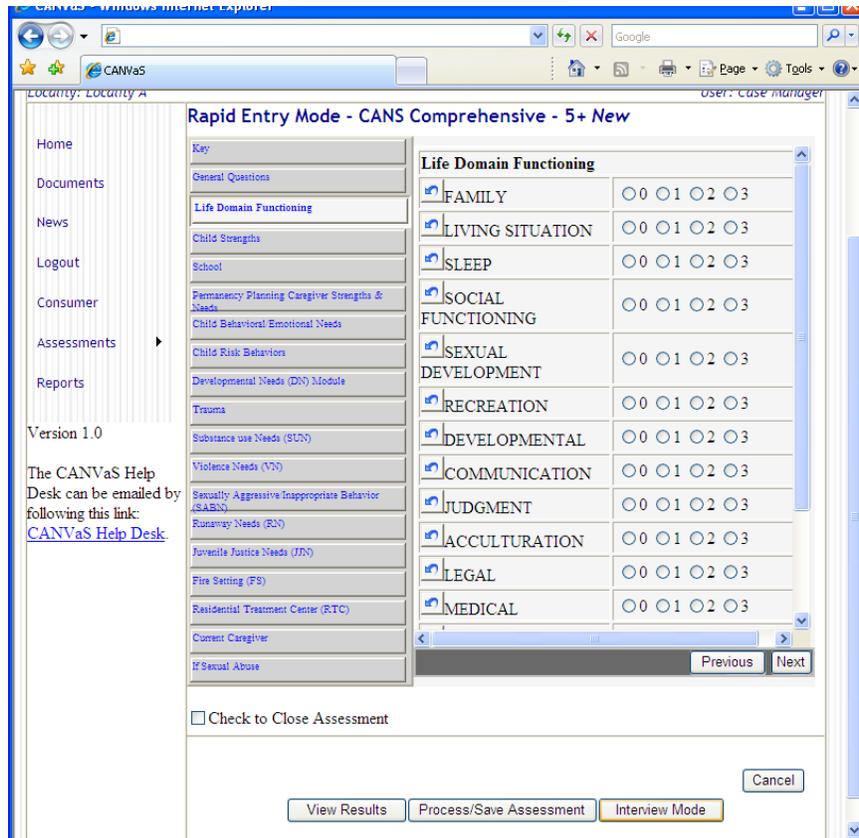


Figure 12 – Rapid Entry Mode -notice the lack of details in this mode

Interview Mode

Interview Mode has the same functionality as Rapid Entry Mode. The only difference is the information displayed. Each question corresponds to a section or domain of the assessment displays. By clicking the Domain Heading questions on the left, each domain’s questions can be viewed and answered. Also, “next” and “previous” navigation buttons at the bottom of the page allow the user to navigate through the assessment in a “wizard-like” format. The section of the assessment titled “General Questions” affects the decision support process. These results are provided to inform decision-making based on the quantified information within the assessment.

Tip: If you choose to review an assessment before you “close” it, when you “View” the assessment, the page displays “Rapid Entry Mode”. Scroll to the bottom of the screen, and click on the “Interview Mode” button. This option provides the full text from the assessment instrument along with the questions and possible answers. (See figure 13)

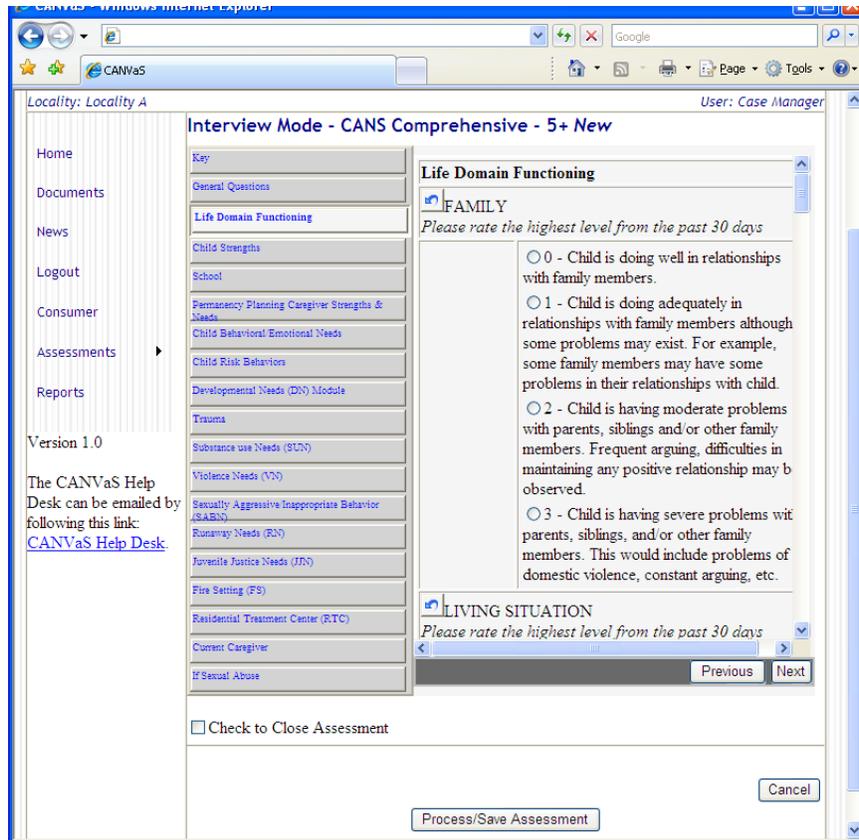


Figure 13 – Interview Mode

-interview mode provides more details to explain the question and answers

Assessment information fields

See figure 11 for a screenshot of the assessment information fields.

Assessor

Select the person who performed the assessment. Depending on the user profile, this may be disabled or may provide a ‘drop-down list’ of certified clinicians. A user without a certification or one having an expired certification will not be listed.

Assessment Date

Enter the date when the assessment was administered. This is not necessarily today’s date.

Reason for Assessment

The three options of Initial, Reassessment and Transition/Discharge indicate when, in the context of treatment, the assessment is being performed.

Select Assessment Tool

There are multiple assessment instruments for different circumstances. All options are displayed. Please refer to the “Documents” area of the website for specifics regarding each assessment tool.

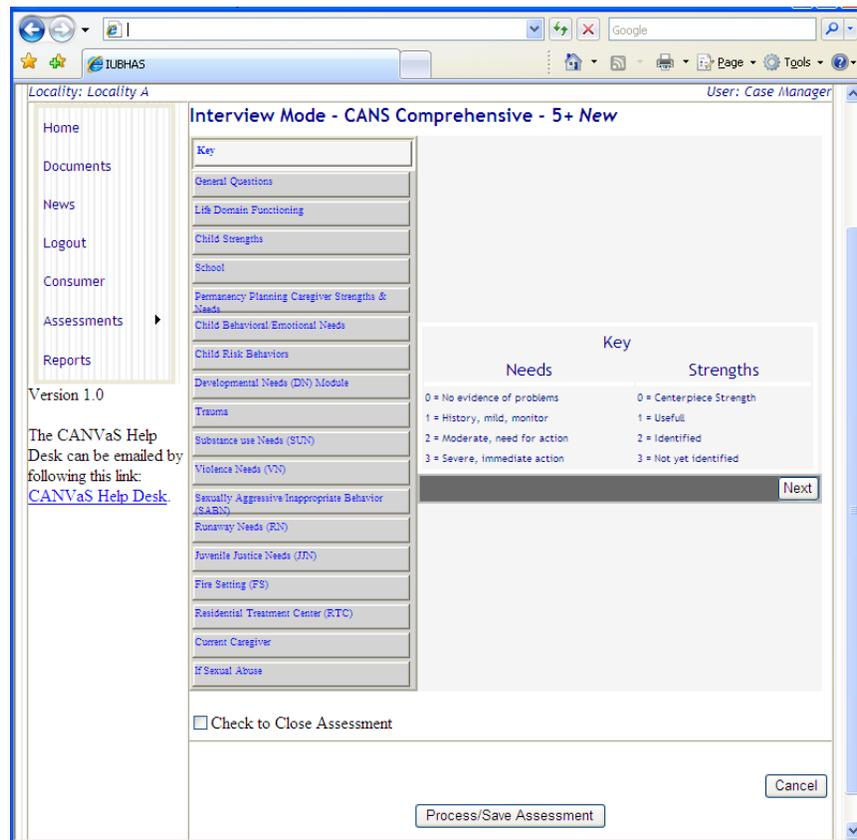


Figure 14 – beginning the assessment

How to fill out an assessment

To fill out the assessment:

1. Click the first of the “**Life Domain**” buttons on the left or you can use the “**Next**” or “**Previous**” buttons for Navigation. (“Key” is the top “Life Domain” button). The rating values display with the Domain header.
2. Click the rating “bubble” as indicated on the scoring sheet. If you click the “wrong” bubble, click the “correct” bubble and the “wrong” entry is removed.
3. Some answers may require the completion of other sections. If so, a message displays in red indicating the required module. (See figure 15 and 16)
4. Complete all the required domains



Figure 15 – a trigger in Rapid Entry mode

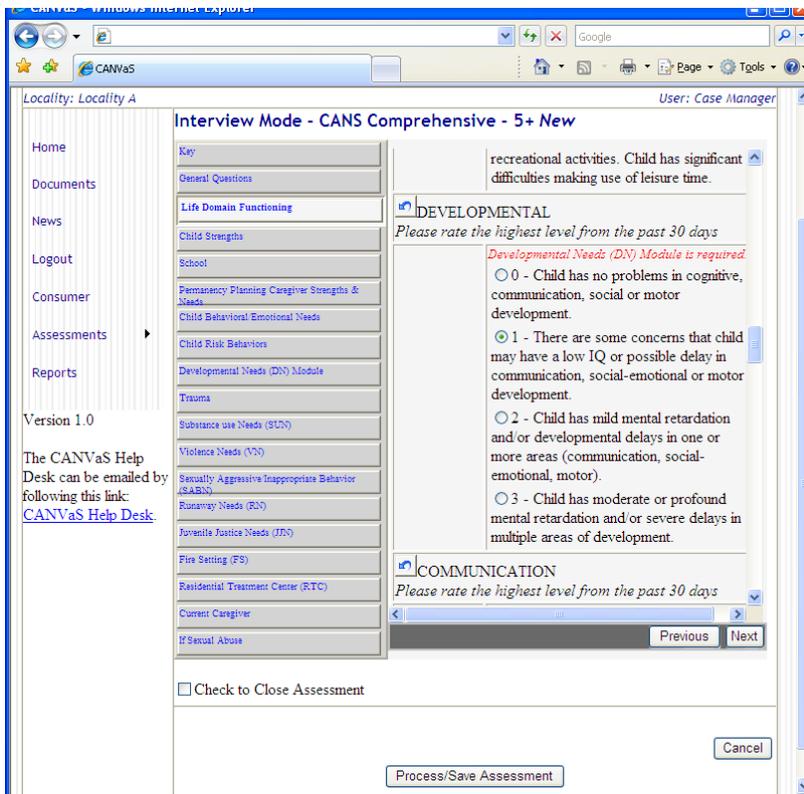


Figure 16 – a trigger in Interview mode

How to end an assessment

These steps will be done prior to activating the decision support threshold process:

1. Ensure the “Check to close Assessment” checkbox is **NOT** selected.
2. Click the “**Process/Save Assessment**” button to save an unfinished assessment at any time. The data will be saved and later you can login and complete the assessment. Be sure to make note of the consumer’s name. Click the “**Cancel**” button if you started an assessment unintentionally or do not want to save any of the data.
3. The application returns to the “**View the Consumer**” page. The assessment is listed as “open” and available to “View” or to “Create a Report”. To review your entries for accuracy, select either “**View**” or “**Report**”.

If you select “view”, you can scroll through the assessment domains, and verify your entries. Please note: If the assessment was completed in “Interview Mode”, when you open the assessment, the Page displays in “Rapid Entry Mode”. To change this, scroll to the bottom of the screen, and click on the “Interview Mode” button. If any of your entries are incorrect, you can make a correction. If you select “Report”, you can use this format to verify your entries.

NOTE: It is highly recommended that you take the review action. Once an assessment is “closed”, it cannot be modified or deleted. Closed assessments are a part of the permanent record.

How to permanently close an assessment

To permanently close an assessment and make it a part of the consumer’s permanent record, follow the same steps as shown above for ending an assessment but ensure the “Check to close Assessment” checkbox **IS** selected.

NOTE: It is highly recommended that you take the review action. Once an assessment is “closed”, it cannot be modified or deleted. Closed assessments are a part of the permanent record.

How to correct incomplete assessment errors

Some questions may trigger other sections within the assessment (e.g., “Juvenile Justice (JJ) Module”). If an answer to an earlier item requires that additional sections must be filled out before the assessment can be closed, a message will display above the question indicating which module is required. Figures 15 and 16 show examples of such triggering questions. If a required section is not completed figure 17 gives an example of the type of message that will be displayed when attempting to close the assessment. In such cases use the “Next” and “Previous” buttons to scroll up or down to complete the module containing the unanswered question(s). This type of error will only be reported when attempting to close an assessment, not when saving an assessment. An incomplete assessment may be saved and completed at a later time.

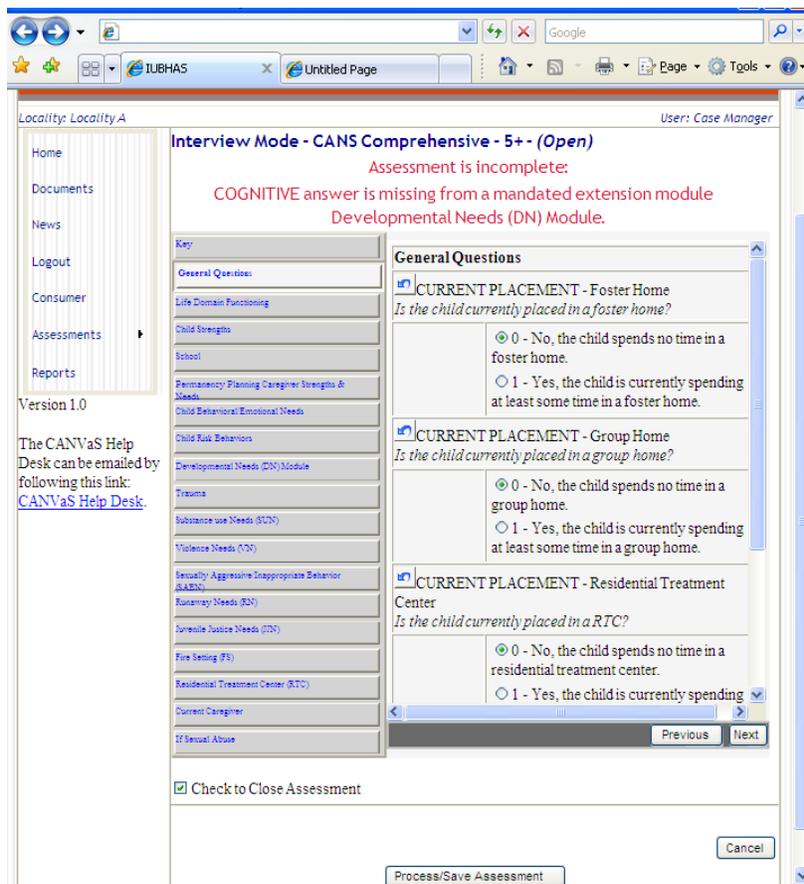


Figure 17- Incomplete Assessment Error -
after the answer in figures 15 and 16 triggered the requirement to perform the Developmental Needs (DN) module.

How to edit an assessment

An assessment cannot have the assessor, date or reason for assessment changed. If these values need to be changed the assessment must be deleted and re-entered. However, if an assessment has not been closed it can still have the answers to the questions edited. To find an assessment and edit the answers do the following:

1. Find the open assessment. This can be done by performing an open assessment report and clicking on **“View”** next to the assessment then clicking on **“View”** next to the report on the next screen. An open assessment can also be found by searching for the consumer with the open assessment, locating the open assessment under the consumer and clicking **“View”** next to the open assessment.
2. Scroll through the assessment questions and answers to verify or modify the answers as needed.
3. When done, the user may either save the assessment or elect to close and save the assessment.

How to update an assessment tool

To update a question in an assessment tool:

1. Login as a global administrator
2. Select **Admin > Questions** from the menu
3. In the “Filter Modules on” drop-down list select the assessment with the question to be modified
4. In the “Select the modules to view questions” drop-down list select the module with the question to be modified. A list of questions in that module will be displayed.
5. To modify a question click the “**Select**” button next to the question. To create a new question, click the “**New**” button. The fields have the following functions:
 - a. Question Order – sets the order of the questions within the module. 0 is first, 1 is next and so on.
 - b. Question Text – enter the question here
 - c. Question Clarification Text – this is where the text giving more details about the context of the question will be entered. This is only visible in Interview mode.
 - d. This Question Triggers a Module – if this question will trigger an extension module check this checkbox and select the name of the module to be triggered in the drop-down box next to this checkbox.
 - e. Active – this is automatically selected when creating a new question but may be deselected after creation. If deselected the question does not appear in an assessment.

To add material to an assessment or create a new assessment tool the involved assessment items must be present in the system. The items must be completed in the order given. As an example, item 1 must be completed before item 2 or 3 can be completed.

1. Assessment tool
2. Assessment module
3. Tool definition
4. Question
5. Answers

How to run the decision support process and analyze the assessment

The Decision Support Threshold process automatically analyzes all the assessment data and processes the data through a pre-determined logic tree to identify a recommended intensity of services. When the process is complete, the recommendation displays on the next page and is saved with the assessment information.

To run the analysis of the assessment the following steps must be completed in the order given:

1. Complete the assessment, be sure to complete all necessary modules
2. Review the assessment. Changes will not be possible once this process is completed
3. Click on “**Check to Close Assessment**” checkbox.
4. Click the “**Process/Save Assessment**” button.

CANVaS Users

A user is someone who uses CANVaS to perform assessments, import or export data or to run reports. There are 5 levels of users:

- Management – this level of user can only run reports. Managers are not given access to enter consumers, generate assessments, import or export data or add other users.
- Data Entry – this level of user can import and export data using the import/export tools. This user is not allowed to enter individual consumers, generate assessments or add users.
- Case Managers – this level of user can enter consumers and assessments and generate reports for their locality only. Case Managers cannot perform imports and exports of data or generate reports including localities other than their own. Case managers can generate reports for their own locality.
- Report Administrator – Report are able to run reports on localities they administer. Report Administrators cannot import and export data or run reports outside their own locality.
- System Administrator – this is the top level in the system and can perform all functions, including the creation of Report Administrators.

Deleting a user

Once a user has been added to CANVaS the user cannot be deleted from the system. The CANVaS system provides for a user to be deactivated rather than deleted. This is done to provide continuity for historical data in the system, deleting a user who performed an assessment would delete the user from the assessment and from all reports. See the “Deactivate user” section of this document for information on deactivating a user.

Managing a user’s certifications

A user cannot enter an assessment they are not certified to give. Managing the certifications is the responsibility of the Administrator for the locality where the user is located. A user will receive a warning message when they login if their certification is set to expire within 30 days. To recertify, a user can go to the CANVaS Home page and click on the link called “CANS On-line training and certification” to begin the recertification process. If a user’s certification is allowed to expire they will not be able to select an assessment requiring that certification.

Reports

The CANVaS system has several built-in reports available to display individual consumer information, aggregated locality-level information or outcomes. Each report has common features that are controlled at the top of the report. Below is a description:

- Navigation arrows with page numbers enable users to navigate to the next/previous page or skip to a particular page.
- Users can adjust the size of the report on the screen by using a drop-down box with various options (e.g., 100%, page width, whole page, etc...)
- A text-box with the “Find | Next” link beside it allows users to search for particular words in the report.
- The “Export” link below the navigation arrows allow users to select a format type from the drop-down box, click the “Export” link and have the report display in the format selected.

Report Condition Key

Reports without an asterisk are functioning properly and may be used. Reports with asterisks have the following issues:

** The report will have reduced capabilities until a working algorithm is installed in the CANVaS system.

Available Reports

- [Individual Report](#)
- [Open Assessment](#)
- [Consumer Reassessments](#)
- [Past Due Reassessments](#)
- [Staff Certification](#)
- [Case Manager Assessments](#)
- [Clinician’s Assessments Report](#)
- [User Activity Log](#)

Each report has common features that are controlled at the top of the report. Below is a description:

- Navigation arrows with page numbers enable users to navigate to the next/previous page or skip to a particular page.
- Users can adjust the size of the report on the screen by using a drop-down box with various options (e.g., 100%, page width, whole page, etc...)

- A text-box with the “Find | Next” link beside it allows users to search for particular words in the report.
- The “Export” link below the navigation arrows allow users to select a format type from the drop-down box, click the “Export” link and have the report display in the format selected.
- Print – this does not work. See “How to print a report” below to learn how to print reports.

How to print a report

To print a report the report must first be viewed in a PDF reader, typically Adobe Acrobat, and then printed from the PDF viewer.

To print a report:

1. Generate the desired report
2. Using the “**Select a format**” drop-down list at the top of the report page select “**Acrobat (PDF) file**” (See figure 25)
3. Click “**Export**” next to the drop-down list to generate the report in a PDF format
4. Print the report using the printer icon within the PDF viewer (See figure 21)

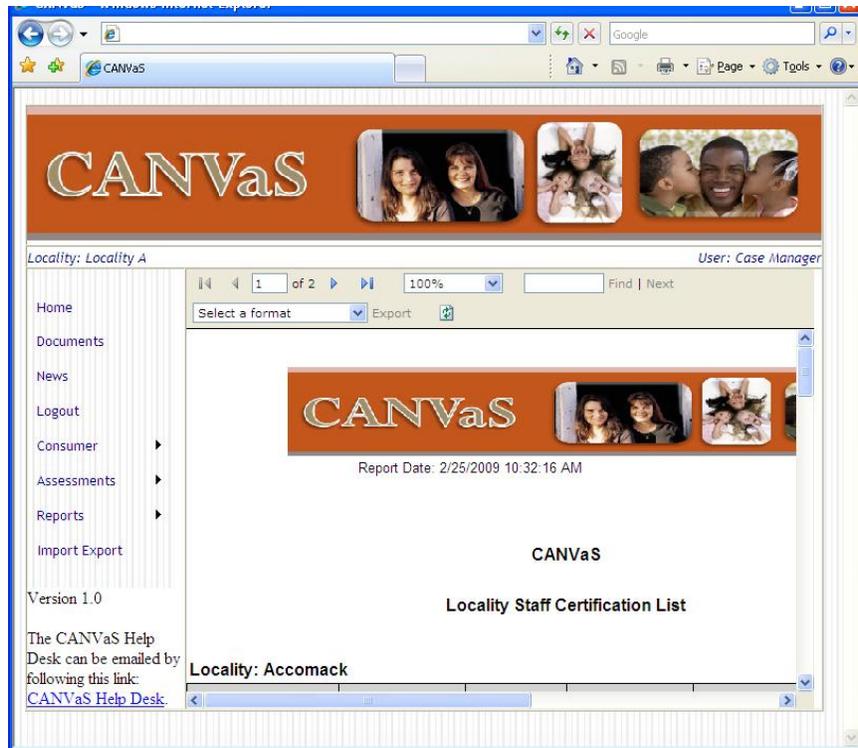


Figure 25 – selecting a PDF output format

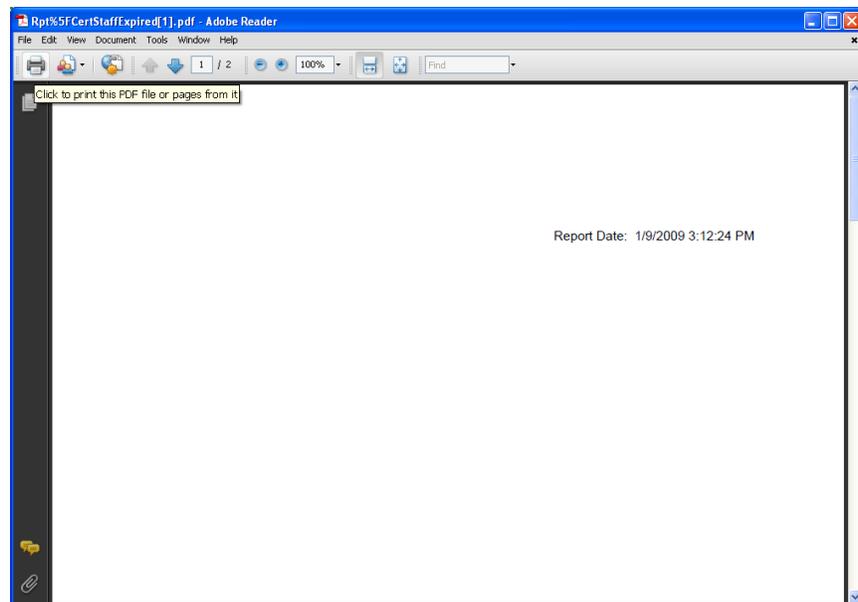


Figure 26 – printing from the PDF viewer

Individual Report**

** NOTE: This report is available in CANVaS but does not contain the Recommendations Result section result. The report will have reduced capabilities until a working algorithm is installed in the CANVaS system.

The Individual Report lists all assessment item scores and decision model recommendations for intensity of services or placement. This report is accessed through the View Consumer page (accessible from the menu: “Consumer” > “View”). For the selected consumer, each assessment is displayed in a grid below the consumer information, a “report” link is provided in each row. (See Figure 27)

The screenshot shows the CANVaS web application interface. At the top, there is a navigation menu with options like Home, Documents, News, Logout, Consumer, Assessments, Reports, and Import Export. The main content area is titled 'View Consumer' and displays the following information:

Consumer Information:

- Name: Bunny, Bugs The
- Internal ID: testconsumer007
- BHAS ID: 45127
- CSDS ID: [blank]
- Birth Date: 12/25/1999
- SSN: [blank]
- Medicaid #: [blank]
- Ethnicity: Unknown
- Race: African American, Asian, Native Hawaiian, American Indian, Caucasian
- Gender: Male, Female
- Zip Code: [blank]
- Mom's Maiden: [blank]

Assessments Table:

| | | Tool | Visit Date | Visit ID | Status |
|----------------------|------------------------|-------------------------|------------|----------|--------|
| View | Report | CANS Reassessment - 5+ | 02/04/2009 | 39997 | Closed |
| View | Report | CANS Reassessment - 5+ | 12/12/2008 | 39993 | Closed |
| View | Report | CANS Comprehensive - 5+ | 06/06/2008 | 39994 | Closed |
| View | Report | CANS Comprehensive - 5+ | 01/23/2008 | 39954 | Closed |

Buttons: Edit Consumer, Add Assessment

Figure 27 – View Consumer Screen to Run Individual Report

A sample of the report is shown in the figure below (See Figure 28). The top portion of the report displays summary information including their identifying information, assessment date, the assessment tool used, assessor's name (certified clinician who performed the assessment) and the decision support recommendation.

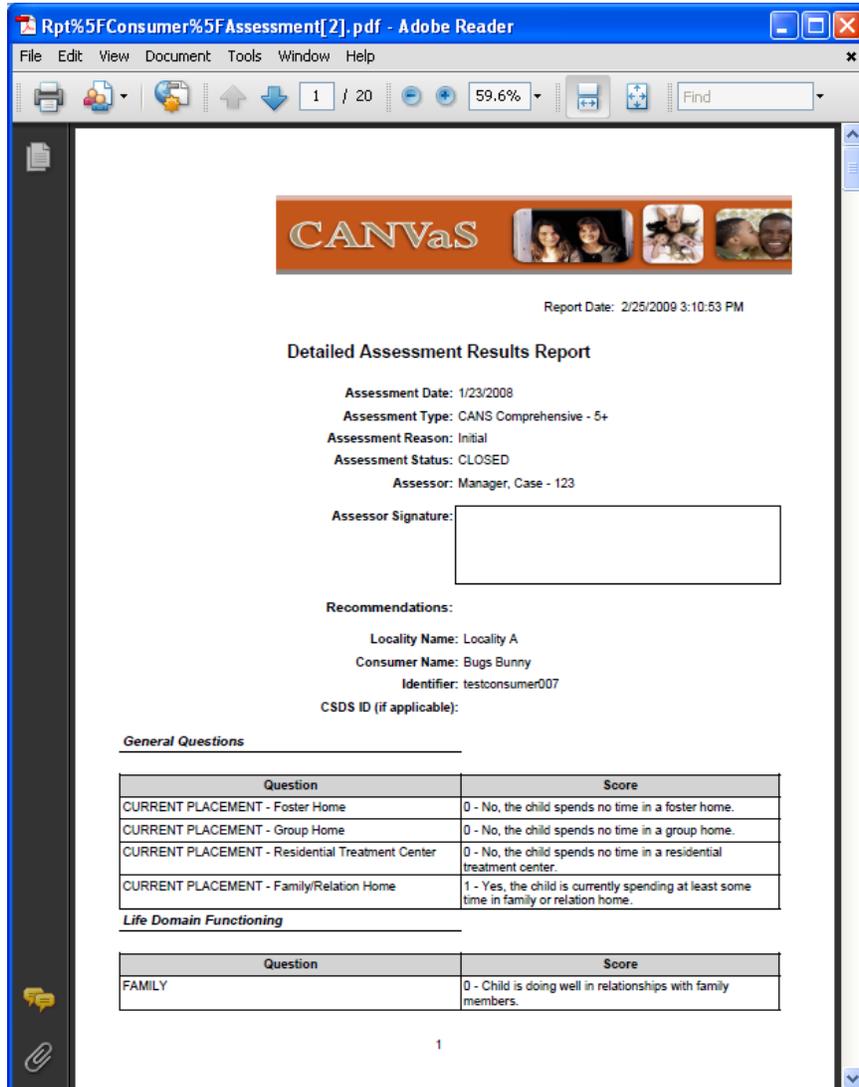


Figure 28 - Sample Individual Report

Open Assessment Report

The Open Assessment Report provides for the user the ability to quickly view if a selected clinician has open assessments (or un-closed assessments) that need to be completed or deleted. When the report is selected from the Report Menu option “Open Assessments” option, the above page appears. A grid will appear if there are any consumers with open assessments matching the selection criteria. The user can then quickly jump to the consumer’s demographic page by selecting the “View” option for the corresponding consumer in the grid. The user may also generate a paper report by clicking on the “Generate Report” button. An example of an Open Assessments Report is shown in Figures 29 and 30 below.

The screenshot shows the CANVaS web application interface. At the top, there is a header with the CANVaS logo and three small photographs of people. Below the header, the page is titled "Report: Open Assessment Report". The interface includes a navigation menu on the left with options like Home, Documents, News, Logout, Consumer, Assessments, Reports, and Import Export. The main content area has a "Locality: Locality A" and "User: Case Manager" indicator. It features two dropdown menus for filtering: "Please select a locality." (set to "ALL Localities in the Network") and "Select a specific Clinician." (set to "Manager, Case"). A "Generate Report" button is located to the right of these filters. Below the filters is a table with two columns: "Consumer" and "Assessment".

| | Consumer | Assessment |
|----------------------|--|------------------------------------|
| View | Bear, Yogi Date: 02/02/2007 | CANS Comprehensive - 5+ Type: 1 |
| View | Squarepants, SpongeBob Date: 07/20/2008 | CANS Comprehensive - 5+ Type: 1 |
| View | Doe, Jane Date: 11/02/2008 | CANS Comprehensive - 5+ Type: 1 |
| View | User, Test Date: 01/01/2009 | CANS Comprehensive - 5+ Type: 2 |

Figure 29 – Open Assessments

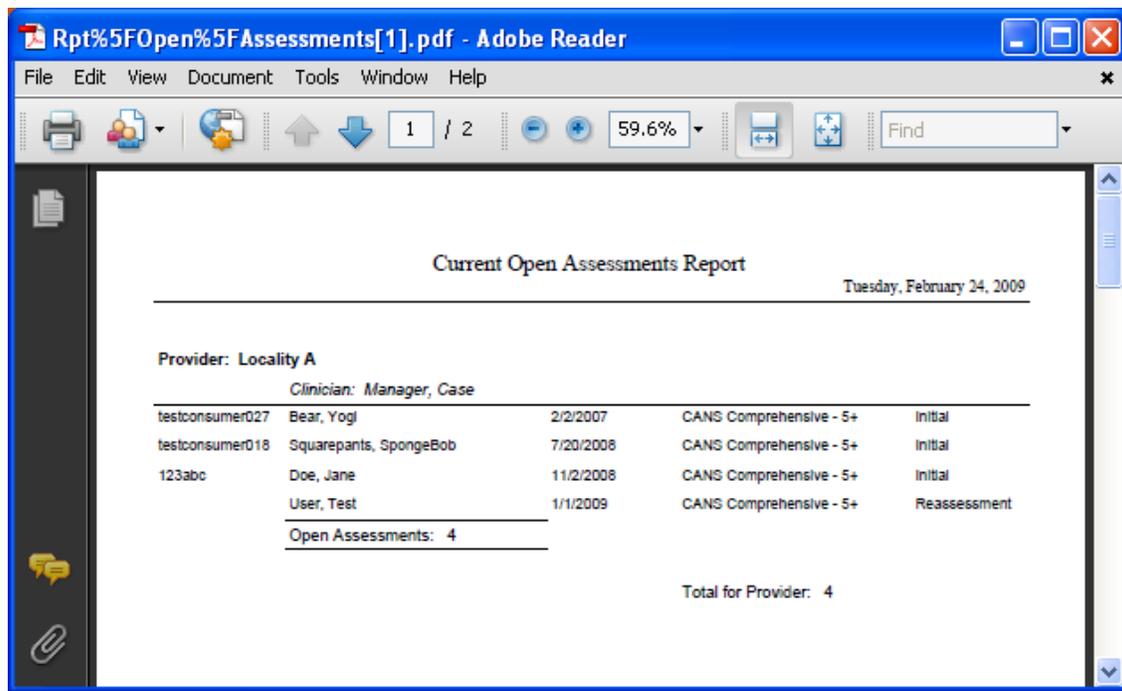


Figure 30 - Example of Open Assessment Report

How to obtain an open assessments report

The Open Assessments report will be limited based on the login running the report. If the account running the report can only see one locality the report will cover only that one locality. If the account running the report can see multiple localities, the report will be generated on the data from those localities. If the account running the report is an administrator with global access the report will include all localities in the system. (See Figure 31.)

To generate an Open Assessments report:

1. Login
2. Select **"Reports"** > **"Open Assessments"** from the menu
3. Select the Locality from the drop-down list
4. Select the case manager from the next drop-down list
5. The results of your selections will be automatically displayed. If you need to print or save the report click the **"Generate Report"** button.



Figure 31 – the Open Assessments Report

Consumers Reassessment Report

The Consumer Reassessment Report can be found under the Report Menu heading and the option “Reassessment Report”. This report will provide for the user a listing of consumers who have been assessed one or more times, but are due for additional reassessment based upon a 180 day reassessment target.

The options of the report allow the user to select a range for the consumers Report Options that will be falling on that anniversary date. There are four predefined date ranges that can be picked by making sure the “Select by Range” button is selected and then picking either 2 Weeks, 30 Days, 6 Weeks, or 60 Days. All of those options are in relation to today or the date that the report is being executed. The system then looks at all consumers who’s last assessment would be 180 days prior of that window of time selected. (See figure 32.)

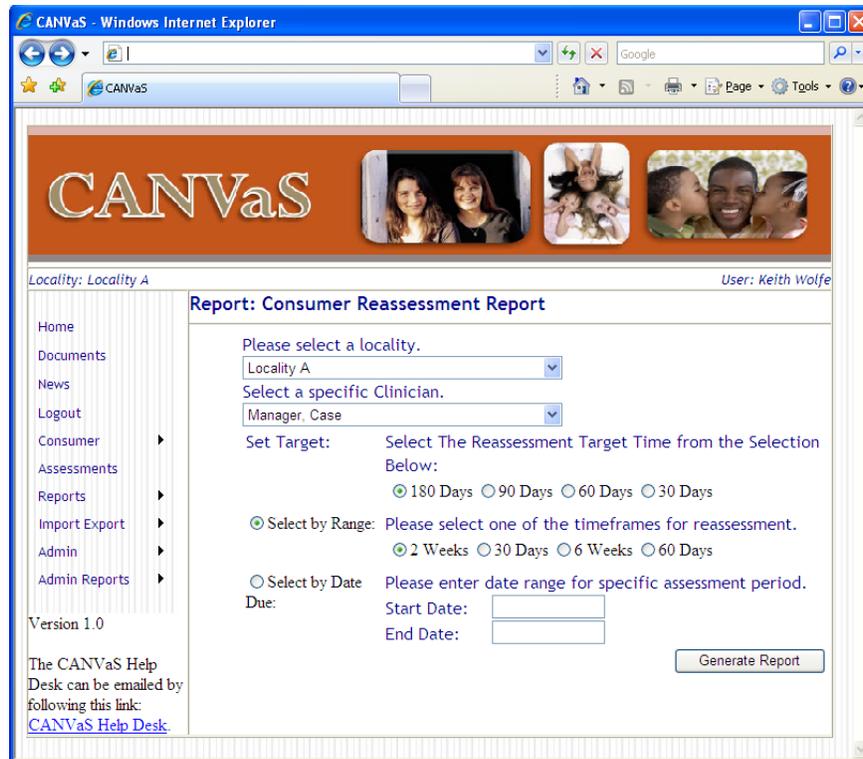


Figure 32 – The Consumer Reassessment

The reassessment target that this report is run against, may be selected from the first set of buttons. The default option for reassessment is 180 days. The user may choose to set the target to either 90 or 60 days. This will then alter the calculation for the generation of this report to check all consumers for reassessment based up the indicated target.

The user may also set a custom date range to better target and plan for reassessments. This is done by making sure the “Select by Date Due” option button is marked, and then the Start Date and End Date of that range should be entered. The user can choose as little as a day or as long as they wish.

This report is broken down by Locality, Clinician and then Consumer If you are not an Administrator, or otherwise allowed to run the report, the first dropdown box in the illustration in Figure 5 above will not be visible.

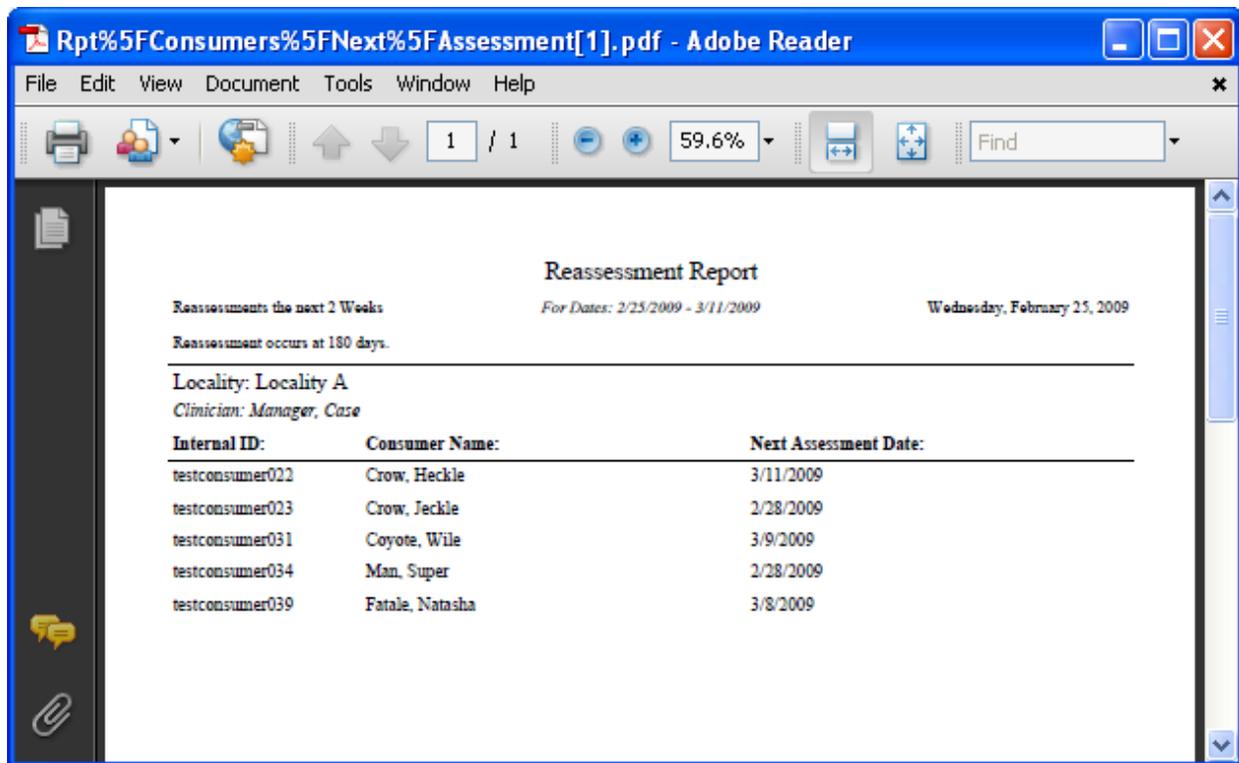


Figure 33 - Example of Consumer Reassessment Report

The report displays the Consumer’s Name, their internal identifier and the date that the system indicates is their 180 anniversary from their last assessment. (See Figure 33)

How to obtain a consumer reassessments report

The Consumer Reassessments report will be limited based on the access of the account running the report. . If the account running the report can only see one locality the report will cover only that one locality. If the account running the report can see multiple localities the report will be generated on the data from those localities. If the account running the report is an administrator with global access the report will include all localities in the system.

To generate a Consumer Assessments report:

1. Login
2. Select **“Reports” > “Reassessments Report”** from the menu
3. Select the criteria for the report from the available options and click **“Generate Report”**.

Past Due Reassessments

There is a reminder button that will automatically appear on the Consumer Search page if the user has any assessments coming due within 30 days. Clicking on this button will provide a report listing all consumers due a reassessment within 30 days of the current date. (See figures 34 and 35)

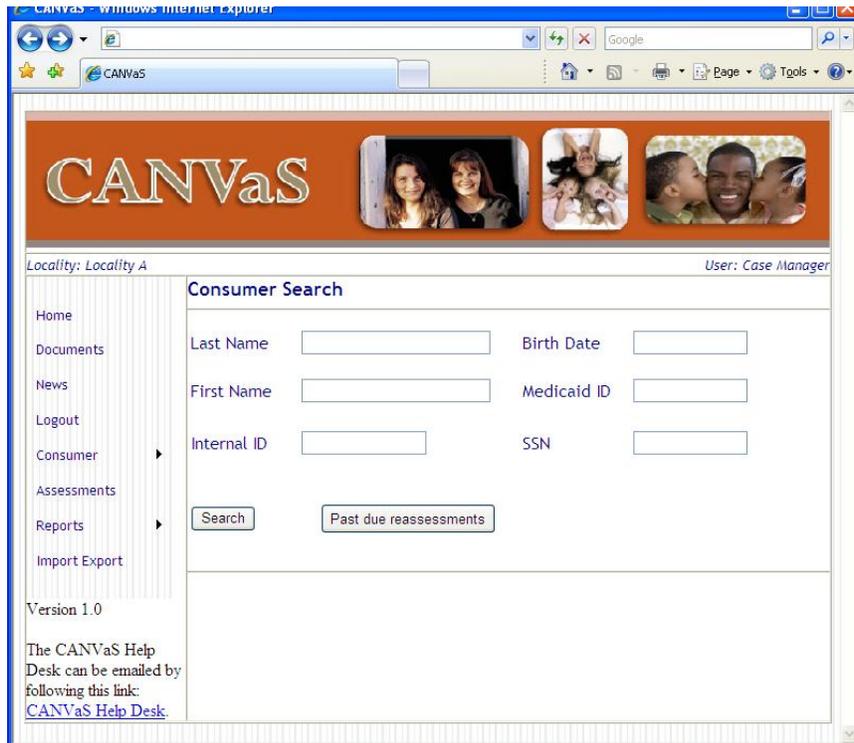


Figure 34 – the Past Due Reassessments button

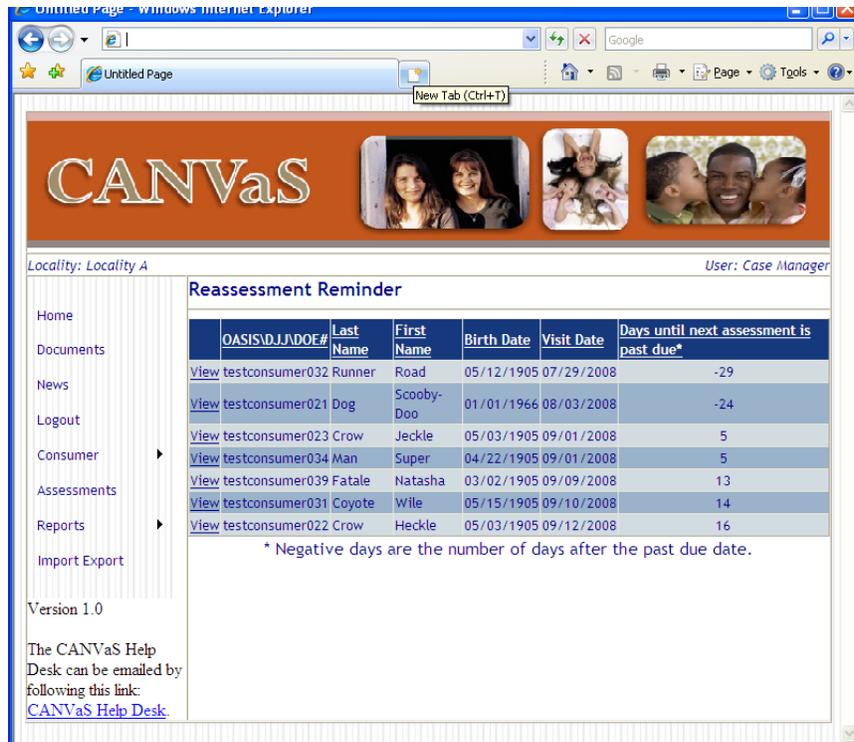


Figure 35 – a sample Reassessments Reminder report

Staff Certification Reports

The Staff Certification report is used to provide a list of staff members with certifications. The report can optionally be configured to show staff members with certifications that will expire within a selected number of days. (See figures 36 and 37)

From the “Reports” menu, select the “Staff Certification” option to display a page to select options for this report. The report will display different options depending which radio button is selected, Current Certified Staff or Staff near/with Expired Certification. See the figure 38 below:



Figure 36 – Current Certified Staff report options

- **Current Certified Staff:** This option allows the user to view all staff for the locality that are currently certified with the CANS assessment tools.
 - Clicking this option also displays text-boxes to enter a date range. This will limit the report to view staff certified within the date range selected.
 - Leaving the date range empty will display all currently certified staff the logged in user can access
 - The report will display the users' name, Clinician ID and certification expiration date.
 - See figure 8 for a sample of the Current Certified Staff report showing all localities

CANVaS

CANVaS
Locality Staff Certification List

Locality: Accomack

| Last Name | First Name | Case Mgr ID | Expiration Date | Certification Type |
|-----------|------------|-------------|-----------------|--------------------|
| Beasley | Elizabeth | | 9/13/2009 | CANS Certification |

Locality: Albemarle

| Last Name | First Name | Case Mgr ID | Expiration Date | Certification Type |
|-----------|------------|-------------|-----------------|--------------------|
| Harrison | Tom | | 12/8/2009 | CANS Certification |
| Lewis | Cheryl | | 9/13/2009 | CANS Certification |

Locality: Alexandria

| Last Name | First Name | Case Mgr ID | Expiration Date | Certification Type |
|-----------|------------|-------------|-----------------|--------------------|
| Gingery | PJ | | 9/4/2009 | CANS Certification |
| White | Dawnel | | 11/21/2009 | CANS Certification |

Locality: Augusta

| Last Name | First Name | Case Mgr ID | Expiration Date | Certification Type |
|-----------|------------|-------------|-----------------|--------------------|
| Dunn | Lisa | | 11/11/2009 | CANS Certification |

Locality: Bedford County

| Last Name | First Name | Case Mgr ID | Expiration Date | Certification Type |
|-----------|------------|-------------|-----------------|--------------------|
| Hullette | Krystal | | 11/17/2009 | CANS Certification |

Locality: Campbell

| Last Name | First Name | Case Mgr ID | Expiration Date | Certification Type |
|-----------|------------|-------------|-----------------|--------------------|
| Coates | Karen | | 11/17/2009 | CANS Certification |

Figure 37 - Current Certified Staff report

- **Staff near/with Expired Certification:** Selecting this option allows the user to view all staff for the locality who have certifications nearing or expired. The resulting report displays a list of staff in sections based on time until/after expiration.
 - The first section displays staff whose certification is due in less than 30 days or past due by less than 30 days. The number of days until expiration (positive number) and days past expiration (negative number) is included.
 - The second section displays staff with expiration dates at 30-60 and 60-90 days from today's date.
 - See figure 38 for a sample of the Staff near/with Expired Certification report:

Report Date: 2/25/2009 9:47:04 AM

CANVaS

CANVaS

Locality Staff Certification Expiration List

Locality A

Due or Past Due

| Last Name | First Name | Case Mgr ID | Expiration Date | Days Left | Cert Type |
|-----------|------------|-------------|-----------------|-----------|--------------------|
| Wilson | Carol | | 2/15/2009 | -10 | CANS Certification |

Due in 30 to 60 Days

| Last Name | First Name | Case Mgr ID | Expiration Date | Days Left | Cert Type |
|-----------|------------|-------------|-----------------|-----------|--------------------|
| Manager | Case | 123 | 3/31/2009 | 34 | CANS Certification |
| Manager | Case | 123 | 3/30/2009 | 33 | CANS Certification |

Figure 38 - Certification Expiration Report

How to obtain a case manager staff certification report

The Case Manager Staff Certification report can only be viewed by administrators and provides the same information as the Staff Certification report. If the account running the report is an administrator with global access the report will include all localities in the system.

To generate a Case Manager Staff Certification report:

1. Login as administrator
2. Select **“Admin Reports”** > **“Case Manager Staff Certification”** from the menu
3. Select the locality from the drop-down list
4. Select **“Current certified staff”** or **“Staff near/with Expired Certification”**
5. Click **“Process Report”**

Clinician’s Assessments Report

The Clinician’s Assessment Report generates for the user a breakdown of a clinician’s assessment caseload. The report is selectable by Locality and by Clinician. If you are not an Administrator or otherwise allowed to run the report, the first dropdown box in the illustration above will not be visible. The user may select a specific period of time to limit the scope of the report by entering in either a start or/and end date. The report returns for the user an aggregate count of consumers assessed by the clinicians, and they are grouped by the assessment tools used

and reasoning for assessment such as “Initial” or “Reassessment” as indicated in the example below. (See figures 39 and 40.)



Figure 39 – Clinicians Assessments Options

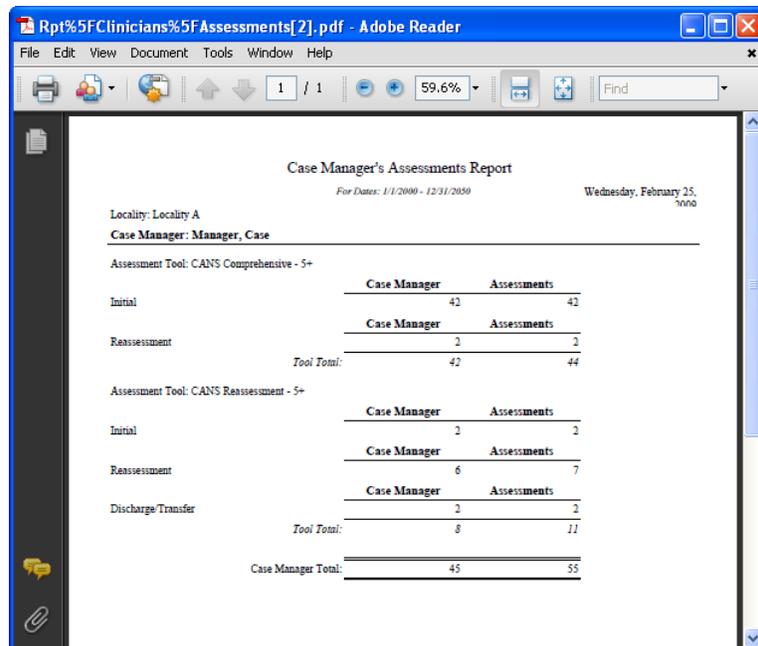


Figure 40 - Example of Clinician’s Assessments Report

How to obtain a case manager assessments report

The Case Manager Assessments report will be limited based on the access the account running the report has. If the account running the report can see multiple localities the report will be generated on the data from those localities. If the account running the report is an administrator with global access the report will include all localities in the system.

To generate a Case Manager Assessments report:

1. Login
2. Select **“Reports”** > **“Case Manager Assessments”** from the menu
3. Select the Locality from the drop-down list
4. Select the case manager from the next drop-down list
5. Enter the start and end dates
6. Click **“Generate Report”**

How to contact the CANVaS Help Desk

Any questions regarding the CANVaS system should be directed to your local User Administrator or the CANVaS Help Desk at (877) 727-8329, canvashelpdesk@rcrtechnology.com