

User Manual for

Access to CANVaS

for the administration of the

**Virginia Child and Adolescent Needs and Strengths (CANS)
Assessment**

for the

Comprehensive Services Act for At-Risk Youth and their Families (CSA)



October 2013 (Version 4)



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Purpose of this Document

*This document replaces Version 3 of the “Policies and Procedures for Access to CANVaS” document dated December 2010 and **only** instructs readers on how to create accounts in CANVaS. A second document, “Navigating CANVaS” has been created to provide updated information regarding changes to CANVaS. “Navigating CANVaS” instructs users on how to enter data and assessments in CANVaS and addresses some common problems in completing online assessments.*

Section I.

CANVaS Introduction

Welcome to CANVaS! CANVaS is the web-based application of the Virginia Child and Adolescent Needs and Strengths (CANS) Assessment tool for children, youth and families served by the Comprehensive Services Act (CSA). The CANS is the mandatory uniform assessment instrument required for children and youth served through the Comprehensive Services Act. CANS administered for other purposes (non-CSA) may not be entered into CANVaS.

Information entered into CANVaS is confidential. It is difficult to overstate the importance of ensuring at all times that the information regarding children and families entered into CANVaS be kept confidential. Individuals who have access to CANVaS must realize the importance of maintaining the confidentiality of the information and ensure that it is not shared with anyone who is not authorized. CANVaS is for use only with children, youth and families served by CSA.

All users of CANVaS, no matter what role or level of access, must sign a Users' agreement, which may be found in Section VI of this document. The Users' agreement will be authorized by a case manager's supervisor and the Designated Super User/Report Administrator (DSU/RA) or the Office of Comprehensive Services, depending on the role of the user.

This document is intended as a quick resource to use in the process of gaining access to CANVaS. Additional detail regarding the system is found in the Users' Manual, which is posted on the CANVaS Home Page at <https://canvas.csa.virginia.gov>

Acronyms and terms used in this document:

CANS – Child and Adolescent Needs and Strengths assessment

CANVaS – not truly an acronym, indicates Virginia's web-based version of the CANS

CSA-Comprehensive Services Act

OCS – Office of Comprehensive Services

RCR – RCR Technology, Inc.- company that provides Help Desk for CANVaS

IT-Information Technology

HR-Human Resources

Case Manager-This term is used generically throughout this document to describe all local public agency staff who perform a CSA case management function. Agencies or localities may use terms such as "foster care worker", "social worker", "service coordinator", "school social worker", etc. The "case manager" is the individual responsible for assessing the strengths and needs of the child and family and working directly with the child and family to carry out the service plan.

Super User-This term describes a local public agency staff person who has received specialized training and been certified as a Super User by Dr. John Lyons (the developer of the CANS).

Designated Super User/Report Administrator- This term is used to describe a Super User who has been designated by the locality to provide authorization for access to CANVaS for case managers. Designated Super Users will be Report Administrators and will have a higher level of access to CANVaS. The acronym DSU/RA is used throughout this document for these individuals.

Localities may elect to choose someone other than a Super User as the Report Administrator.

Report Administrator-an individual who is not a Super User but has been designated by the locality to provide authorization for access to CANVaS and has a higher level of access to CANVaS data for the locality.

Section II

Policies and Procedures for Case Manager* Access to CANVaS

CANVaS is the web-based Child and Adolescent Needs and Strengths (CANS) assessment tool used for children, youth and families who are served by the Comprehensive Services Act (CSA). The CANS is the mandatory uniform assessment instrument required for children and youth served through the Comprehensive Services Act (CSA) in Virginia. CANS administered for other purposes (non-CSA) may not be entered into CANVaS.

Information entered into CANVaS is confidential. Individuals who have access to the system must realize the importance of maintaining the confidentiality of the information and ensure that it is not shared with anyone who is not authorized. CANVaS is for use only with children, youth and families served by CSA.

Initial Access to CANVaS for Case Managers

To access CANVaS, you must first read, complete and sign the Users' agreement in Section VI of this document. This agreement must be approved by your agency supervisor and a Designated Super User/Report Administrator in your locality. Your supervisor's approval is necessary to ensure that you have a legitimate right to access the system because of your job function and that you are an employee (case manager) of one of the four core CSA agencies (local Department for Social Services, Court Services Unit, Community Services Boards and public school system) or the locality's CSA office. The DSU/RA's authorization is needed to confirm that you are currently certified on the use of the CANS.

To find a Designated Super User/Report Administrator for your locality, look on the Super User Roster on the CSA website at http://www.csa.virginia.gov/rosters_reporting/cans3a.cfm Not all Super Users are designated as Report Administrators who can approve access to CANVaS. Designated Super Users will have the letters "DSU/RA" (Designated Super User/Report Administrator) following their names on the roster. If your locality has chosen someone other than a Super User as Report Administrator, this individual and his/her contact information can be found at [CANVaS RA List](#)

The DSU/RA will need a copy of your current CANS certification from the www.CANSTraining.com website. Print a copy of your certificate when you complete certification testing. You can print your certificate at any time. To do so, log into www.CANSTraining.com and click on "My Account" on the upper right hand side of the page. A list of your certificates will appear. Click on "Download Certificate" for the current certificate. Print the certificate using the print function in your browser and provide it to your DSU/RA.

**As noted in the Introduction, the term "case manager" is used generically in this document to describe all local public agency staff that perform a CSA case management function. Agencies or localities may use terms such as "foster care worker", "service coordinator", "school social worker", "social worker", etc. The "case manager" is the individual responsible for assessing the strengths and needs of the child and family and working directly with the child and family to carry out the service plan.*

Levels of Access

As a case manager you will only have access to the assessments you enter into CANVaS and the reports generated by those assessments. Only the Designated Super User/Report Administrator(s) may view all information in the system for your locality.

Help Desk Support and Process for Access

RCR Technology will provide the Help Desk support for CANVaS. The RCR Help Desk may be reached by

- E-mail at: canvashelpdesk@rcrtechnology.com
- Phone at: (877) 727-8329
- Fax at: (317) 631-3345
- Mail at: CANVaS Help Desk
RCR Technology
251 North Illinois Street, Suite 1150
Indianapolis, Indiana 46204

You may fax, scan and e-mail, or mail your signed and approved Users' agreement to the RCR Help Desk. You should keep a copy for your records. After sending your agreement, you must then contact the Help Desk either by submitting an online request or by phone to request a password. The online request form is found at http://www.csa.virginia.gov/html/CANS/CANVAS_register1.cfm You may choose your password which must be:

- eight-ten characters,
- not based on a single dictionary word and include;
 - upper case letter(s),
 - lower case letter(s)
 - symbol(s); and
 - number(s).

You will also be asked to provide an answer to a pre-selected secret question on the Users' agreement. You should **not** indicate on the Users' agreement which question you will be answering. Simply choose a question so you can provide this information readily to the RCR Help Desk. Do **not** write this answer on your Users' agreement. Once your approved agreement is received by the Help Desk, and you have contacted the Help Desk to establish a password and answer to your secret question, your account will be activated. You will then be able to access CANVaS at <https://canvas.csa.virginia.gov>

Termination of Employment

If you leave your position as case manager, your account must be deactivated. You or your supervisor **must** contact either the Help Desk directly or the Designated Super User/Report Administrator who will contact the Help Desk to de-activate your account. Leaving your account open could potentially jeopardize the confidentiality of the information you have entered. It is recommended that DSU/RAS periodically check the listing of case managers to ensure the accounts of those who have left employment have been de-activated.

Quick Steps for Accessing CANVaS for Case Managers

1. Read, complete and sign the Users' agreement.
2. Print a verification of your CANS certification from the www.CANSTraining.com website.
3. Obtain your supervisor's signature.
4. Obtain the signature of a Designated Super User/Report Administrator in your locality.
5. Fax or mail the Users' agreement to the CANVaS Help Desk at RCR Technology.
6. Contact the CANVaS Help Desk by submitting the online form http://www.csa.virginia.gov/html/CANS/CANVAS_register1.cfm or phone (877) 727-8329 to create a password and provide an answer to a pre-selected "secret" question.
7. The CANVaS Help Desk will authorize your account.
8. Log-in to CANVaS at <https://canvas.csa.virginia.gov>



Section III

Policies and Procedures for Supervisors of Case Managers Who Need Access to CANVaS

To access CANVaS, all agency case managers must obtain the signature of their supervisor. This signature is necessary to verify that the case manager:

- is an employee of the local Department for Social Services, Community Services Board, Court Services Unit, public school system or is a CSA staff person directly employed by the local government*; and
- has a legitimate right to access the system to fulfill job responsibilities.

Case managers will also need the authorization of the locality's Designated Super User/Report Administrator to confirm that they are currently certified on the use of the CANS. For more information about case manager access to CANVaS, please see Section II.

**Only public agency employees operating under the Comprehensive Services Act will have access to CANVaS. Employees of private provider agencies do not have access.*

Termination of Employment

If a case manager leaves employment, the account must be deactivated. The agency supervisor must contact either the Help Desk directly or the Designated Super User/Report Administrator who will contact the Help Desk to de-activate the account. Leaving the account open could potentially jeopardize the confidentiality of the information that was entered. It is recommended that DSU/RAs periodically check the listing of case managers to ensure that the accounts of those who have left employment are de-activated in CANVaS.

Section IV

Policies and Procedures for Designation of Super Users/Report Administrators and their Access to CANVaS

CANVaS is the web-based Child and Adolescent Needs and Strengths (CANS) assessment tool for use with children, youth and families served by the Comprehensive Services Act (CSA). The CANS is the mandatory uniform assessment instrument required for children and youth served through the Comprehensive Services Act in Virginia. CANS administered for other purposes (non-CSA) may not be entered into CANVaS.

Determination of Designated Super Users/Report Administrators (DSU/RAs)

The Community Policy and Management Team (CPMT) in each locality should designate either Super Users, who have been trained and certified by Dr. Lyons, or Report Administrators, who will be the locality's primary point of contact for CANVaS. Designated Super Users/Report Administrators (DSU/RAs) authorize case manager access to CANVaS and have access to the locality's CANVaS data. As some localities have multiple Super Users, it must be clearly determined at the local level who will carry out the responsibilities for access to CANVaS. Some larger localities could assign a Super User/Report Administrator at each of the core CSA agencies to perform this function. A general rule of thumb to follow is one Super User/Report Administrator for each 100-125 children the locality is currently serving. Localities may determine that it is more appropriate for an IT staff, HR staff, or some staff person other than the Super to serve in this role regarding access to CANVaS, and in those cases Report Administrators (RA) may be named. Individuals who are solely Report Administrators do not have to be certified by Dr. Lyons as CANS Super Users. Report Administrators will follow the same process outlined below and in Section VI for access and authorization as the Designated Super User.

Designated Super User/Report Administrator Approval Process

Requests to become the DSU/RA or RA for a locality must be sent to the Office of Comprehensive Services. Each designated individual must read and sign the Users' agreement, have their supervisor sign, and fax or mail the form to Carol Wilson at OCS for confirmation. Faxes should be sent to (804) 662-9831 and the mailing address for OCS is:

Office of Comprehensive Services
1604 Santa Rosa Road, Suite 137
Richmond, Virginia 23229

Designated Super Users/Report Administrators may, but do not have to submit verification of their CANS certification. OCS will use the master list provided by the CANS Training site to verify certification. An e-mail will be sent to the RCR Help Desk to confirm the DSU/RA's authorization for access and authorization to approve case manager access. The DSU/RA will be copied on this e-mail. OCS will keep the copies of the Users' agreement. OCS will be responsible for providing the RCR Help Desk with the names of the Designated Super Users/Report Administrators authorized by OCS, either individually or in a list. The Help Desk will verify that the DSU/RAs names on the Users' agreements faxed by case managers are on the listing.

Log-in to CANVaS

The Designated Super User/Report Administrator will contact RCR to create a password and provide the answer to a pre-selected secret question. The listing of possible questions is provided on the Users' agreement. Do **not** indicate on the agreement which question you are selecting and do **not** write the answer on the agreement. The DSU/RA may then log-in at <https://canvas.csa.virginia.gov>

Level of Access

Designated Super Users/Report Administrators will have a higher level of access to the system than case managers. They will be able to see reports of all the CANS assessments in their locality. Some DSU/RAs may serve multiple localities and will have access to CANS reports for each of those localities.

Removal from Designated Super User/Report Administrator List

When an individual will no longer serve as a Designated Super User/Report Administrator, he or she must notify OCS and the RCR Help Desk to remove his/her name from the authorized DSU/RA or RA list. The Help Desk will deactivate the account. OCS will remove the DSU/RA designation by the individual's name on the CANS Super User Roster on the CSA website at www.csa.virginia.gov or will remove the individual's name from the Report Administrator list on the CSA website.

Quick Steps for Designated Super Users to Access CANVaS and Become an Approved "Designated Super User/Report Administrator."

1. Determine locally who will be the Designated Super User(s)/Report Administrator(s).
2. Read, complete and sign the Users' agreement.
3. Have your supervisor authorize your access.
4. Fax or mail signed agreement to OCS. Fax number is (804) 662-9831.
5. Receive copy of confirmation of approval from OCS by e-mail. This e-mail is sent to RCR (CANVaS Help Desk) so they may register you and add you to the DSU/RA list.
6. Contact the CANVaS Help Desk by submitting the online form found at http://www.csa.virginia.gov/html/CANS/CANVAS_register1.cfm or phone to create your password and provide the answer to your pre-selected secret question.
7. The Help Desk will create your account.
8. Log-in to CANVaS at <https://canvas.csa.virginia.gov>



Section V

Policies and Procedures for Role of Designated Super User/Report Administrator in Assisting Case Manager Access to CANVaS

CANVaS is the web-based Child and Adolescent Needs and Strengths (CANS) assessment tool for children, youth and families served by the Comprehensive Services Act (CSA). The CANS is the mandatory uniform assessment instrument required for children and youth served through the Comprehensive Services Act in Virginia. CANS administered for other purposes (non-CSA) may not be entered into CANVaS.

Information entered into CANVaS is confidential. Individuals who have access to the system must realize the importance of maintaining the confidentiality of the information and ensure that it is not shared with anyone who is not authorized.

Role of Designated Super User/Report Administrator

Designated Super Users/Report Administrators must verify that the case manager is currently certified on use of the CANS. The case manager should provide you with a copy of the printed certification from the www.CANSTraining.gov

Role of Agency Supervisor of Case Manager

Case managers must obtain the signature of their agency supervisors to verify that they:

- are employees of the local Department for Social Services, Community Services Board, Court Services Unit, public school system or is a CSA staff person directly employed by the local government; and
- have a legitimate right to access the system to fulfill job responsibilities.

Role of Case Manager

Case managers must read, fully complete and sign the Confidentiality and Users' agreement found in Section VI of this document. It is their responsibility to obtain the authorization signatures and will access your contact information on the CSA web site. After they have obtained the DSU/RA authorization (and that of their supervisor) the case manager will fax or mail the form to the RCR Help Desk. He or she will then contact the RCR Help Desk to obtain a password, provide an answer to a pre-selected question and be given access to CANVaS. (See Section II for policies and procedures for case manager access to CANVaS.)

Data Entry Access

Data entry only access is permitted. Localities who wish to request this access should contact OCS (804-662-9815) for further information.

Locality Listing of Authorized Case Managers

Designated Super Users/Report Administrators should keep a copy of the case manager agreements they have authorized. It may be helpful to create a listing of names, certification dates and e-mail addresses.

Section VI

CANVaS Individual User and Confidentiality Agreement

CANVaS is the web-based Child and Adolescent Needs and Strengths (CANS) assessment tool for children, youth and families served by the Comprehensive Services Act (CSA). The CANS is the mandatory uniform assessment instrument required for children and youth served through the Comprehensive Services Act in Virginia. CANS administered for other purposes (non-CSA) may not be entered into CANVaS.

Instructions:

Everyone must read, initial and submit page 11, and complete the first page of the form itself (page 12 of this document). Case managers must also have page 13 completed with the signatures of his/her supervisor and DSU/RA. All three pages must be submitted for case managers (11,12,13). Case managers should submit the approved agreement directly to the CANVaS Help Desk at fax number (317) 631-3345 or scan and e-mail to canvashelpdesk@rcrtechnology.com or mail to the address on the form.

DSU/RAs need to complete and submit pages 11, 12 and 14. Data entry only staff should complete pages 11, 12 and 15. The agreements should be sent to OCS at fax number (804) 662-9831 or by mail to:

CANS Administrator
Office of Comprehensive Services
1604 Santa Rosa Road, Suite 137
Richmond, Virginia 23229

CANVaS Confidentiality and User Agreement

This form shall be signed by an employee of any public agency needing access to CANVaS. It defines the requirement to maintain confidentiality and the employee agreement to abide by the system rules. A signed copy is maintained by the authorized User and may be maintained by the Super User who confirms the certification of the User.

All information in the system is confidential and all Users have the responsibility to abide by applicable confidentiality laws. Users who violate these laws will have access to CANVaS immediately revoked. If a User believes that the confidentiality of his/her password has been compromised, he/she must immediately change the password and notify the Help Desk of the concern.

Case managers may only access family and child specific information for those individuals with whom they are working.

By signing this form, the User acknowledges the conditions under which access to CANVaS is granted and agrees to be held to these conditions.

By initialing page 11 and signing below (on page 12), the User acknowledges and agrees with the following:

- I have read and agree to abide by the CANVaS Confidentiality Policy.
- I understand that information in CANVaS is confidential and can only be used for those purposes as required by the Comprehensive Services Act.
- I am responsible for safeguarding my system user ID and password.
- I will not permit others to utilize my User ID and password.
- I will keep my User ID and password confidential and will not share with anyone.
- I will not permit others to access my CANVaS account after I have logged into the system.
- My computer will not be left unattended when a CANVaS session is open.
- A lock-out screen saver will be used after a period of 10 minutes.
- I will always log off and close the browser when finished with a CANVaS session.

By signing the agreement, the authorized User acknowledges that if he or she leaves employment, that he or she has no right to and may not access the information in CANVaS. The User further acknowledges that this Agreement is binding after termination of employment and confidential information such as User ID or password or consumer information shall not be shared with others.

_____ Initials (p.11)

Authorization Page

CANVaS Individual User Agreement and Confidentiality Agreement for

CASE MANAGERS

Supervisor Authorization: As the agency supervisor of _____

(User requesting authorization), I verify that he/she is an employee of

_____ (name of agency) and

requires access to CANVaS, the online CANS assessment, for his/her job duties.

Signature: _____

Printed Name: _____

Date: _____

Designated Super User/Report Administrator Authorization: As a Designated CANS

Super User of _____ locality, I have verified that the

CANS certification of _____ (name of User requesting

authorization) was completed on _____ and will expire on

the following date _____.

Signature: _____

Date: _____

Please fax to (317) 631-3345 or scan and e-mail to canvashelpdesk@rcrtechnology.com or mail the completed form (pages 11-13) to:

CANVaS Help Desk
RCR Technology
251 North Illinois Street, Suite 1150
Indianapolis, Indiana 46204

All three pages of Section VI must be submitted (pgs 11, 12, 13).

Authorization Page

CANVaS Individual User Agreement and Confidentiality Agreement for

Designated Super User/Report Administrator

Supervisor Authorization: As the agency supervisor of _____

(User requesting authorization), I verify that he/she is an employee of

_____ (name of agency) and

requires access to CANVaS, the online CANS assessment, for his/her job duties.

Signature: _____

Printed Name: _____

Date: _____

Designated Super User/Report Administrator Authorization*: As a Designated CANS

Super User or Report Administrator of _____ (name of

locality) I have included a copy of my current CANS certification.

Signature: _____

Date: _____

Please fax to (804) 662-9831 or scan and e-mail to carol.wilson@csa.virginia.gov
or mail the completed form (pages 11, 12 and 14) to:

CANS Administrator
Office of Comprehensive Services
1604 Santa Rosa Road, Suite 137
Richmond, Virginia 23229

*If you are solely a Report Administrator, circle "Report Administrator" and sign and date the document. You do not have to include a copy of CANS certification.

All three pages of Section VI must be submitted (11, 12 and 14).

Authorization Page

CANVaS Individual User Agreement and Confidentiality Agreement for

DATA ENTRY

Supervisor Authorization: As the agency supervisor of _____

(User requesting authorization), I verify that he/she is an employee of

_____ and

requires access to CANVaS, the online CANS assessment, for his/her job duties.

Signature: _____

Printed Name: _____

Date: _____

Designated Super User/Report Administrator Authorization: As a Designated CANS

Super User/Report Administrator of _____ (locality) I verify that

_____ (User requesting authorization) needs access to CANVaS,

the online CANS assessment, for **data entry purposes only**.

Signature: _____

Date: _____

Please fax to (804) 662-9831 or scan and e-mail to carol.wilson@csa.virginia.gov
or mail the completed form (pages 11, 12 and 15) to:

CANS Administrator
Office of Comprehensive Services
1604 Santa Rosa Road, Suite 137
Richmond, Virginia 23229