eCANS System User Manual
Supervisor Role

(Version 2.4)

Chapin Hall at the University of Chicago

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REVISION HISTORY

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2015-10-16	1.0	User's manual	Belle Li
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1. OVERVIEW

The eCANS System is a web-based application with function attached to access levels. For the Supervisor role, the system allows users to add, edit, review, approve, return, transfer, close, delete and submit CANS assessments on children and families being served. The supervisor can also add and remove accounts for members of the supervisor's team. The eCANS System will also support a robust set of reporting features.

For specific permission to use eCANS in the state of Texas, please contact CANS@dfps.state.tx.us. For more information on the eCANS or CANS contact:

eCANS
eCANS2@chapinhall.org
www.eCANS.org

2. SYSTEM SECURITY

2.1 USER SIGN-ON

LOG IN

To log in to the system, go to: https://ecans.org. Enter your user name and password and click [Enter].

> *Note* that your account will be created by a state administrator or supervisor administrator. You will need to provide your supervisor – or whoever is the designated person at your agency responsible for account creation – with the required information. Once the account is created, the system will automatically notify you of your username and will provide you with a link to go to the website and set your password.

LOG OUT

When you are logged in, you will see the **Logout** link on the upper right corner of every screen. You can log out of the system at any screen by clicking the **Logout** link. After clicking that link, the system will bring you back to the Login page.

HELP

For help navigating the eCANS website, contact the help desk at eCANS2@chapinhall.org.

2.2 PASSWORD MANAGEMENT

PASSWORD RETRIEVAL

If you forget your password, click the [Forgot your password?] link on the login screen. After clicking that link, the system will send you to this page:


Enter your user name and email address and click [Reset Password]. You will receive an email with a link to reset your password.

- Click the link provided in the message to reset your password and log in.
- Click [Cancel], if you wish to leave this page and return to the login page.

Note that if you try to log in to the website with the wrong password, you will be locked out of your account after the **third** attempt. The system will then send a link to re-set your password; or, you can wait 30 minutes for your account to unlock and try to enter the current correct password.

3. eCANS ENTRIES: MANAGING A CANS ASSESSMENT

This section reviews how to manage a CANS assessment in eCANS. In order to manage a CANS assessment, you will need to be assigned access which allows you to add, edit, review, submit, delete, and approve the assessment. Upon logging in, you will see the following [HOME] page:
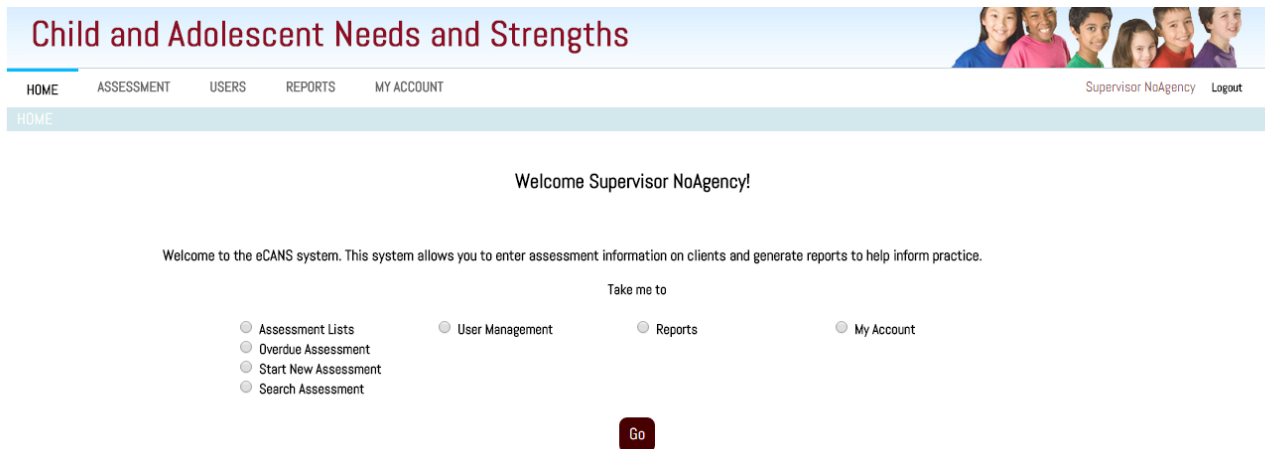
From this page, you can navigate around the website using the tabs at the top of the page, or you can click on the buttons to access different screens.

Tabs:

o   HOME: (see below)
o   ASSESSMENT: Gives user the first four options described on the [HOME] page, below.
o   USERS: Gives user the User Management option described below.
o   REPORTS: Allows user to view child CANS reports.
o   MY ACCOUNT: Takes user to profile page.

HOME page:

o   Assessment Lists: Shows all complete and incomplete assessments that a user has created. If user has supervisees, their complete and incomplete assessments will also show here.
o   Overdue Assessment: Shows all assessments that are overdue or coming due.
o   Start New Assessment: Allows user to create a new assessment.
o   Search Assessment: Allows user to look for an assessment that was created.
o   User Management: Allows user to manage the accounts of team members under user's supervision, including creating new logins, deactivating an account and re-setting passwords.
o   Reports: Allows user to generate various child reports.
o   MY ACCOUNT: Takes user to profile page.

3.1 VIEW ASSESSMENT LISTS

All assessments that you or your team members have created appear in your **Assessment Lists**. You can access your **Assessment Lists** in two ways from the [HOME] page:

➢ Scroll over the [ASSESSMENT] tab, then click on **Assessment Lists**
➢ Click on the button next to **Assessment Lists** in the middle of the page and click [Go]

HOME	ASSESSMENT	USERS	REPORTS	MY ACCOUNT			Supervisor NoAgency	Logout

ASSESSMENT / Assessment Lists

Status: All ▾   Last Update Date: All ▾   Assessor: All ▾   Date Range: ▭ - ▭   **Show**

All Assessments

Person Identification (PID)	Date of Assessment	Last Update Date	Child Name	CANS Assessor	Case ID	Assessor Agency	Status	Action
32176588	10/31/2017	10/31/2017	Danyelle Cornelius	mtx_DCWSNA2			Pending Approval	🔍 ⊖ ✔ 🗑
98734531	10/31/2017	10/31/2017	Garth Brooks	mtx_DCWSNA2			Pending Approval	🔍 ⊖ ✔ 🗑
01276865	01/26/2017	10/26/2017	Adam Suttree	mtx_DCWSNA1			approved	🔍
98734529	10/26/2017	10/26/2017	Nathan G Brooks	mtx_DCWSNA2			approved	🔍
98734530	10/26/2017	10/26/2017	Nellie L Brooks	mtx_DCWSNA2			approved	🔍

The first time you go to your **Assessment Lists** page, there may be no entries there. You will begin to see entries once you or your team members enter assessments into the system.

The **Assessment Lists** page is where you look for any assessments that
➢ you or your team members have started;
➢ you have completed and are waiting for supervisory approval (if applicable);
➢ have been submitted by your team members waiting for you to approve; and
➢ you have submitted that have been approved.

The default for this page is <u>All Assessments</u>. You have other options if you go to the Status field and click on the down arrow:

Status type:

➢ <u>All</u>: Every assessment that you or your team members have created.
➢ <u>Incomplete</u>: Assessments that you or your team members have created but have not finished.
➢ <u>Returned</u>: Assessments that your supervisor has returned for revision (if applicable) or that you have returned to a team member for revision.
➢ <u>Pending Approval</u>: Assessments that are waiting for you or your supervisor to approve.
➢ <u>Approved</u>: Assessments that you or your supervisor have approved.
➢ <u>Closed</u>: Assessments that were begun and never completed and were closed as incomplete.

• Each page has a header that shows the child's Person Identification (PID); date the assessment was created (Date of Assessment); date the assessment was last updated (Last Update Date); child's first and last name (Child Name); person who created the assessment (CANS Assessor); the family/case ID (Case ID) (note: this field is not used in TX, so field will be blank); assessor's agency (Assessor Agency); stage of completion (Status); and action icons (Action).
• If incomplete, the status will show how long it has been open.

Note that assessments are displayed in order of the last update date, so those most recently created or edited will show up first.

You can also filter the page by how recently the assessments were updated (Last Update Date), by assessor name (Assessor) or by the date or date range when the assessments were created (Date Range).
➢ Once you change a filter from the default setting, you must click on the [Show] button to activate the new filter criteria.

<u>ICON INDEX</u>

- The action icons:
  - ✏️ Edit assessment
  - 🗙 Close assessment (please check with your policy to determine when to close an assessment)
  - 👤⤴ Transfer an assessment to another case worker
  - 🗑️ Delete assessment
  - 🔍 View assessment
  - ⛔ Return assessment
  - ✅ Approve assessment

3.2 ADD A NEW ASSESSMENT

You can **create a new assessment** in two ways from the [HOME] page:

- ➢ Click on the button next to **Start New Assessment** in the middle of the page and click [Go]
- ➢ Scroll over the [ASSESSMENT] tab, then click on **Start New Assessment**

This opens up to the child demographic page:

ASSESSMENT / Start New Assessment

Child Demographic Information

Person Identification (PID): *	
Child/Youth's First Name: *	
Child/Youth's Middle Initial:	
Child/Youth's Last Name: *	
Gender:	Please Select ▼
Date of Birth: *	
Race/Ethnicity:	Please Select ▼
Primary Language:	Please Select ▼
Medicaid Number: *	
Age:	

Address

Street Address:	
City:	
Zip:	
County:	
State:	Mirror Texas State ▼

Assessment Status

Date of Assessment: *	
Removal Date: *	
Child Welfare Involvement:	○ In Care
	○ Child welfare involvement but not in care
	○ Not in care
Assessment Type: *	Please Select ▼
Assessor Phone Number:	xxx-xxx-xxxx
CANS Assessor:	mtx_ staff
Assessor Agency:	STAR Health

Caregivers   Add Caregiver

First Name	Last Name	Relationship	Action

COMPLETING THE CHILD AND CAREGIVER DEMOGRAPHICS

Child Information—In this section, you will fill out the child's information. *Any field with an asterisk (*) is a required field.*

CHILD DEMOGRAPHIC INFORMATION

Person Identification (PID)*: Enter the unique number that your system uses to identify a child. *Note* that TX requires the PID to be exactly 8 numbers.
Child/Youth's First Name*: Enter child's first name.
Child/Youth's Middle Initial: Enter child's middle initial, if known.
Child/Youth's Last Name*: Enter child's last name.
Gender: Choose gender from the options in the drop-down box.
Date of Birth*: Choose child's date of birth using the calendar.
Race/Ethnicity: Choose child's race/ethnicity from the options in the drop-down box.
Primary Language: Choose child's primary language from the options in the drop-down box.
Medicaid Number*: Enter child's Medicaid ID. *Note* that TX requires the Medicaid Number to be exactly 9 numbers.
Age: This field autofills based on the Date of Birth compared to the Date of Assessment.

ADDRESS

Street Address: Enter the child's current home address.
City: Enter the city the child resides in.
Zip: Enter the child's current zip code.
County: Enter the county the child resides in.
State: Defaults to your state.

ASSESSMENT STATUS

Date of Assessment*: Enter the date of assessment.
Removal Date*: Enter the date CPS took custody, also known as the date Temporary Managing Conservatorship was awarded to CPS.
Child Welfare Involvement: Choose whether the child is currently *in care* (child welfare involvement <u>and</u> in out-of-home care), *not in care* (no child welfare involvement) or has *child welfare involvement but is not in care* (child welfare involvement <u>but not</u> in out-of-home care).
Assessment Type*: Choose the CANS type from the list of options in the drop-down box:
1. <u>Initial Assessment</u>: Choose this option when this is the first assessment done after case opening.
2. <u>Re-assessment</u>: Choose this option when a CANS assessment has previously been done for this child, even if someone else did that assessment.
3. <u>Closing Assessment</u>: Choose this option when you close the case, discharge the child or end service provision.
Assessor Phone Number: Enter your phone number.
CANS Assessor: This autofills with your username.
Assessor Agency (if applicable): This autofills with your agency name.

> *Reminder*:
> If you are entering a CANS assessment for a child for the first time in the eCANS website, but it is NOT the first/initial CANS for this child, choose "Re-assessment" as the assessment type.
> If you are entering a CANS assessment for a child and an assessment has already been created and is still open, you will be prompted to return to that assessment and will not be allowed to open an additional assessment for this child.

> *Note*: When creating a new CANS assessment for cases already in eCANS, the most recent ratings will automatically appear. You must review those ratings and make necessary changes based on information gathered on the child and caregiver since the last assessment.

Caregiver Information—In this section, you will fill out the caregiver information. You will add each caregiver and assess each caregiver separately. *Any field with an asterisk (*) is a required field.*

CAREGIVER INFORMATION

To **add a caregiver**, click on the box that says [Add Caregiver]

Add Caregiver

First Name: *

Last Name: *

Caregiver role options: * Parent/Guardian ▼

Relationship to Child: * Other ▼

Gender: Please Select ▼

Phone: xxx-xxx-xxxx

Address:

City:

ZIP:

County:

State: Texas ▼

[Save]   [Cancel]

1. Enter the caregiver's first name and last name.
2. Choose the caregiver's role to the child: **Parent/Guardian** or **Substitute Caregiver (i.e., temporary caregiver)**.
3. Select the caregiver's relationship to the child from the list of options in the drop-down box.
4. Select the caregiver's gender from the list of options in the drop-down box.
5. Complete the caregiver's phone number and address information.
6. Then click [Save] to save this information.

You may also **edit the information of a current caregiver** by clicking on the 'Edit' icon ✏ or delete a caregiver by clicking on the 'Delete' icon 🗑 .

Once you have completed the child and caregiver information, click on the [Save] button. You will see the following message:

System Message

Information has been saved. Do you want to return to the Home page?

Yes   No
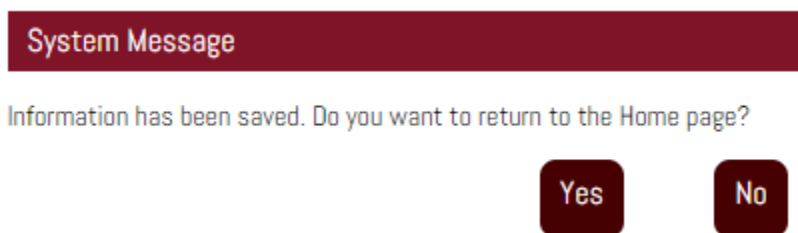
Click [Yes] to leave the assessment and return to your [HOME] page.
To continue on with the assessment, click [No].Then click [Start Assessment] to go to the Assessment page to complete the CANS.

➢ *Note*: If you do not want to complete the assessment at this time, make sure you click [Save] to save any information that was entered and then click [Cancel] to return to **Assessment Lists**.
➢ *Note*: You will see a heading at the bottom of the screen called <u>Sibling Assessments</u>. Since Texas is not using the Family/Case ID field, this area will always be empty, even if this child has siblings who have also received assessments.

COMPLETING THE CANS

When you click on [Start Assessment], you will be taken to this screen:

On this page, you will see all the domains to be completed for the child and for each caregiver. The domains are listed on the left side of the page; the domain that you are currently working on will be open in the middle of the page. (*Note*: Certain domains are age-specific, so if the domain is not applicable due to age, it will not appear.)

Complete the assessment by going through each domain and choose the relevant rating for each item. You may comment on a rating by clicking on the 'Add Comments' button at the top right-hand side of the item: add a comment in the box and click [Add]; the box will close and you will see the comment below the item rating (see below). Use the 'Edit' button (next to 'Add Comments') to change any ratings. To edit the comment, click on the 'Edit' icon inside the comment box. To delete the comment, click on the 'Delete' icon inside the comment box.

For the caregiver domain, you will see a box at the top of the screen that shows a caregiver name. You will first complete the items for this caregiver.

> *Reminder*: If there is more than one caregiver, click on the down arrow in the caregiver name box to pull up the caregiver that you are rating. Once you complete all items for this caregiver, save it by clicking on [Save] at the bottom of the screen, then return to the caregiver name box to choose the next caregiver to rate. Follow this process for each additional caregiver. You can go back and forth between rating caregivers, but remember to save information before leaving the page.

This section includes text boxes that allow you to provide specific information to be used for treatment planning purposes. The completion of this section should be done in collaboration with the client and/or treatment team. Please fill out the following text boxes (*note*: all of these items are required):

- *Clinical Impressions*: Add your clinical impressions here.
- *Priorities for Planning*
    - *Background Needs*: Describe any needs that are likely not addressable but impact the pathway with which treatment is provided, and/or needs that the team chooses not to address at this time.
    - *Treatment Targets*: Describe any needs that will be the focus of intervention. These should be needs that are the causes of difficulty.
    - *Anticipated Outcomes*: Describe any needs that would be expected to respond to the treatment.
    - *Strengths that support the plan*: Describe any strengths that can be used to help address needs.

This section also includes Service Recommendations that are system-generated based on the CANS ratings that you enter. Once the ratings have been entered and the assessment is completed, you will see service recommendations in this box. While this looks like a text box, you cannot write anything there.

After completing a domain, you have the following options at the bottom of the page:

➢ Back to Child Info: Click on (Back to Child Info) to return to the child demographic page. Make sure that you save your work by clicking on the [Save] button before you click on (Back to Child Info) or you will lose any information you have already entered here.
➢ Back to Assessment Lists: Click on (Back to Assessment Lists) to return to the **Assessment Lists** page. Make sure that you save your work by clicking on the [Save] button before you click on this button or you will lose any information you have already entered here.
➢ Undo: Click on the [Undo] button if you entered the wrong ratings for this domain and want to remove the ratings all at once. *Note* that once you save any ratings, the [Undo] button is disabled; however, you can still manually change any rating that has been saved.
➢ Save: Click on the [Save] button to save your ratings for the domain. You can do this at any time. When you click [Next] to go to the next domain, your work will automatically be saved, but you should save your work whenever you leave the assessment page.
➢ Complete: Click on the [Complete] button when you have entered ratings for all items in all the domains (including each caregiver domain). If you click [Complete] and any items and/or domains are incomplete, you will receive an error message alerting you to which domains are incomplete. Click [OK] to return to the domain.
➢ Edit All: Click on the [Edit All] button to expand the item to see all the rating levels; this will allow you to easily change your ratings.
➢ Previous: Click on the (Previous) button to return to the domain that was just completed.
➢ Next: Click on the (Next) button to take you to the next domain. *Note* that when you get to the final domain, there will be no (Next) button.

To complete the domains in a different order, click on a domain name on the left hand side of the page to open that domain and complete the items there.

The bar to the left of the domain name indicates completion status:
Red = not completed
Orange/Yellow = partially completed
Green = completed

Once you leave the assessment, you can view it under the [ASSESSMENT] tab, **Assessment Lists** option:
➢ If the assessment was completed and submitted for supervisory approval, it will be displayed under the **Pending Approval** status.
➢ If the assessment was not completed, it will be displayed under the **Incomplete** status.

3.3 SEARCH FOR AN ASSESSMENT

You can **search for an assessment** in two ways from the [HOME] page:

- ➤ Scroll over the [ASSESSMENT] tab, then click on **Search Assessment**
- ➤ Click on the button next to **Search Assessment** in the middle of the page and click [Go]

ASSESSMENT / Search Assessment							
Person Identification (PID)		Child/Youth's First Name		Child/Youth's Last Name		Search Scope All ▾	Search
Person Identification (PID)	Date of Assessment	Last Update Date	Child Name	CANS Assessor	Case ID	Assessor Agency	Status	Action

To search for an assessment, enter the PID, and/or child/youth's first name and/or last name. You can also specify whether you are looking for an assessment that is open or closed or search through all assessments (Search Scope field). Then click [Search]. This record will be displayed below the header.

If the assessment is open, you have the option to edit or delete. If it is closed, you can view only.

ASSESSMENT / Search Assessment							
Person Identification (PID) 55550000		Child/Youth's First Name		Child/Youth's Last Name		Search Scope All ▾	Search
Person Identification (PID)	Date of Assessment	Last Update Date	Child Name	CANS Assessor	Case ID	Assessor Agency	Status	Action
55550000	05/02/2017	05/02/2017	Rick Stanfield	mtx_sadmin		STAR Health	approved	🔍
55550000	07/14/2017	07/14/2017	Rick Stanfield	mtx_staff		STAR Health	approved	🔍
55550000	09/29/2016	09/29/2016	Rick Stanfield	mtx_staff		STAR Health	approved	🔍
55550000	10/17/2016	10/17/2016	Rick Stanfield	mtx_staff		STAR Health	approved	🔍

Note that assessments are grouped by the assessor who did the assessment and then displayed in order of the last update date, so those most recently created or edited by each assessor will show up first.

3.4 VIEW AN ASSESSMENT

To view any assessment, click on the View icon. 🔍 This will open the assessment to the child's demographic page. On this page you will also see caregiver information. To see the CANS information, click on one of two options:

- ➤ CANS Summary: This report highlights the child's Centerpiece/Identified Strengths (Strengths items rated 0, 1), Potential Strengths (Strengths items rated 2, 3) and Actionable Needs (all other items rated 2, 3). It also includes the assessment narrative section (clinical impressions, priorities for planning, and system-generated service recommendations).
- ➤ View Assessment: This report displays all CANS items and each item's corresponding rating, as well as the assessment narrative section and system-generated service recommendations.

You can print out a copy of the CANS Summary for treatment purposes: click on [CANS Summary] and then click on [Print]. Or click on [Close] to return to the previous page. You can also print out a copy of the full assessment. Click on [View Assessment] and then click [Print].

Child Demographic Information

Person Identification (PID): *	55550000
Child/Youth's First Name: *	Rick
Child/Youth's Middle Initial:	
Child/Youth's Last Name: *	Stanfield
Gender:	Please Select ▼
Date of Birth: *	09/08/2014
Race/Ethnicity:	Please Select ▼
Primary Language:	Please Select ▼
Medicaid Number: *	000100010
Age:	2

Address

Street Address:	
City:	
Zip:	
County:	
State:	Mirror Texas State ▼

Assessment Status

Date of Assessment: *	07/14/2017
Removal Date: *	09/14/2016
Child Welfare Involvement:	◉ In Care
	○ Child welfare involvement but not in care
	○ Not in care
Assessment Type: *	Re-assessment ▼
Assessor Phone Number:	xxx-xxx-xxxx
CANS Assessor:	mtx_ staff
Assessor Agency:	STAR Health

Caregivers   Add Caregiver

First Name	Last Name	Relationship	Action
Carlie	Cole	Traditional Foster Parent	🔍

Sibling Assessments

Person Identification (PID)	Child Name	Case ID	Create Date	Status	View

[CANS Summary]   [View Assessment]   [Cancel]

3.5 EDIT AN ASSESSMENT

To **edit an assessment**, you will need to access your **Assessment Lists** page or you can search for the assessment through the **Search Assessment** page. An assessment must be open (incomplete status) in order to be edited.

➢ On the **Assessment Lists** page, find the assessment in the **Incomplete** list: change Status to **Incomplete** and click on [Show]. Click on the 'Edit' icon and the system will take you to the child information page; you can edit this information or click [Edit Assessment] to go to the CANS and make changes there.

➢ On the **Search Assessment** page, enter the PID or child's first name or last name and click [Search]. When the record is displayed, click on the 'Edit' icon as noted above.

Note that once you save the child demographics, you are unable to make changes to the fields that are grayed out. If information was entered into those fields in error, please contact the Texas CANS support desk (at CANS@dfps.state.texas.us) to assist with correcting this.

3.6 DELETE AN ASSESSMENT

To delete an assessment, access your **Assessment Lists** page or search for the assessment through the **Search Assessment** page. You may only delete an assessment that you created and that is still open (incomplete status).

➢ On the **Assessment Lists** page, find the assessment in the **Incomplete** list: change Status to **Incomplete** and click on [Show]. Click on the 'Delete' icon and a box will pop up asking you if you are sure you want to delete this assessment (see below). If you do, click [Yes]. If you do not, click [No]. "Yes" will remove the assessment from the list. "No" will bring you back to the previous page.

➢ On the **Search Assessment** page, enter the PID or child's first name or last name and click [Search]. When the record is displayed, click on the 'Delete' icon as noted above.

Note: Only incomplete assessments can be deleted. Once an assessment is deleted, it is removed from the system and cannot be retrieved. Be certain that you want to delete an assessment before you delete it!

3.7 APPROVE AN ASSESSMENT

To approve an assessment, access the **Assessment Lists** page.

➢ Change the Status field to **Pending Approval** and click on [Show] to find the assessments that need to be approved.

➢ Go to the Action field and click on the 'Approve' icon ✔
   o You will see a message asking you if you want to approve the record. You can choose to approve the assessment by clicking [Verified], return the assessment for revision by clicking [Fix], or click [Cancel] to return to the **Pending Approval** list without approving the assessment.

Note: Clicking [Fix] will then open the **Return Assessment** window (see section 3.8).

Note: Once the assessment is approved, it can no longer be returned and sent back to the assessor.

Note: Based on some agency requirements, users at the Supervisor level <u>may be able</u> to approve their own assessments.

3.8 RETURN AN ASSESSMENT

To return an assessment, you will need to access your **Assessment Lists** page.

➢ Change the Status field to **Pending Approval** and click on [Show] to find the assessments that need to be approved.

➢ Go to the Action field and click on the 'Return' icon ⊖

  o You will see a message that asks you to enter a note to explain why the assessment is being returned. You can return the assessment by completing the note and clicking on [Return] or click [Cancel] to return to the **Pending Approval** page without returning the assessment.

Return Assessment

Please enter a note to explain why this assessment is being returned to the assessor.

[Return]   [Cancel]

➢ When preparing to initially approve an assessment, you can also return it by clicking on the 'Approve' icon, noticing that the assessment needs to be corrected, and clicking on the [Fix] button as noted above.

Once returned, the record shows up on the **Assessment Lists** page under the **Returned** status. The assessor is now able to edit the assessment and re-submit for approval.

3.9 COMPLETE A RETURNED ASSESSMENT

In some cases, your supervisor might decide to return a completed assessment for you to revise and re-submit.

To complete a returned assessment, access the **Assessment Lists** page.

➢ Change the Status field to **Returned** and click on [Show] to find any assessments that were returned to you.

➢ Find the assessment to be revised (this will usually be the first assessment in the list), go to the Action field and click on the 'Edit' icon:

  o This will take you to the child information page. You will see a comments section that will list the reason for the return and/or what needs to be done. Please follow the instructions for **editing an assessment** – section 3.5 -- above.

| Status: Returned ▼ | Last Update Date: | All ▼ | Assessor: | All ▼ | Date Range: | 🗓 - | 🗓 | Show |

Returned Assessments

Person Identification (PID)	Date of Assessment	Last Update Date	Child Name	CANS Assessor	Case ID	Assessor Agency	Status	Action
43578999	05/03/2017	07/17/2017	Karen , Winters	mtx_staff		STAR Health	returned(107) days	✏ ⊠ 🗑

ASSESSMENT / Edit Assessment

Child Demographic Information

Person Identification (PID): *	43578999
Child/Youth's First Name: *	Karen
Child/Youth's Middle Initial:	
Child/Youth's Last Name: *	Winters
Gender:	Female ▼
Date of Birth: *	03/15/2007
Race/Ethnicity:	Black, not of Hispanic origi ▼
Primary Language:	English ▼
Medicaid Number: *	834098237
Age:	10

Address

Street Address:	54908 Charls Bay
City:	Waco
Zip:	55555
County:	McLennan
State:	Mirror Texas State ▼

Assessment Status

Date of Assessment: *	05/03/2017
Removal Date: *	05/03/2017
Child Welfare Involvement:	● In Care
	○ Child welfare involvement but not in care
	○ Not in care
Assessment Type: *	Initial Assessment ▼
Assessor Phone Number:	xxx-xxx-xxxx
CANS Assessor:	mtx_ staff
Assessor Agency:	STAR Health

Returned Comments:

Wrong ratings for father; assessment for mother missing

Caregivers [Add Caregiver]

First Name	Last Name	Relationship	Action
Nancy	Drew	Traditional Foster Parent	✏ 🗑
Stan	Hardy	Biological father	✏ 🗑
Laural	Hardy	Biological mother	✏ 🗑

Note: A returned assessment, though it is incomplete, will not appear in your **Incomplete** list. To find a returned assessment, you must search using the **Returned** status – or find it on the default **Assessment Lists** page.

3.10 TRANSFER AN INCOMPLETE ASSESSMENT

In some circumstances, you may need to transfer an open (**Incomplete** status) assessment from one direct care worker to another so that it can be completed.

To transfer an incomplete assessment, access the **Assessment Lists** page.
- ➢ Change the Status field to **Incomplete** and click on [Show].
- ➢ Find the assessment that you want to transfer.
- ➢ Go to the Action field and click on the 'Transfer' icon

   o When you click that icon, you'll see a pop-up box where you can choose the new assessor from a drop-down box. Click [Assign] to transfer or [Cancel] to return to the **Assessment Lists** page.

3.11 OVERDUE ASSESSMENTS AND ASSESSMENTS COMING DUE

This system helps keep track of when the next assessment is due, or when an assessment is overdue, based on the frequency with which your system requires an assessment to be completed.

Note that this function is currently disabled for Texas users; contact your state administrator for guidance on how frequently to do a CANS assessment and how to track assessments coming due.

4. MANAGING USER ACCOUNTS

Note: Not all users at the Supervisor Access Level will have User Accounts to manage. If you do not have users directly below you, you will not be able change user accounts or see user status. Confirm with your supervisor or agency before creating user accounts.

4.1 ADDING A NEW USER

As a supervisor, you have the ability to create accounts for your team members. You can do this in two ways from the [HOME] page:

> ➤ Click on the button next to **User Management** in the middle of the page and click [Go]
> ➤ Click on the [USERS] tab, then click on **User Management**

This will take you to the following page that lists the names of your current team members with active accounts in the system:

If you are not sure if someone has an account, you can search by first name, last name, username or email address. If the person is not already listed on the page, click the box that says 'Include Inactive' and click [Search]. If the person does not show up, the person does not have an account.

To add a new user account, click on [Add] and complete the information on the user. *All fields with an asterisk (*) are required.*

> ➤ First* and last name*
> ➤ For User Name* use your agency convention; note that all accounts will begin with the two letter state abbreviation followed by an underscore (_) and then the user name. For Texas, this will likely be your 10 digit NPI number.
> ➤ Email address*
> ➤ The State, User Group* and Supervisor* fields will be auto-filled, but you can change the User Group and Supervisor options as long as they are at access levels below your access level.
>   o *Note:* "Supervisor" is the person who is managing the user's account in eCANS and may or may not be the person's actual supervisor.
> ➤ CANS External User ID is a field on the certificate the user receives when the user passes the CANS certification exam on TCOMTraining.com.
> ➤ Expiration date refers to the expiration date of CANS certification, stated on the certificate: one year from the date user passed the training.
> ➤ Choose an agency from the drop-down box if applicable; leave blank if not.

First Name: *

Last Name: *

User Name: * tx_

Email: *

State: * Texas ▼

User Group: * Supervisor group ▼

CANS External User ID: *

Expiration date:

Supervisor: * tx_sadmin ▼

Agency: STAR Health ▼

Save **Cancel**

Click [Save] to create the user account; an email will be sent automatically to that person to sign into the system and set a password. Or click [Cancel] to return to the previous page without creating an account.

4.2 EDITING A USER ACCOUNT

As a supervisor, you have the ability to make changes to certain fields in the accounts of your team members:

1. Name or email address.
2. Status from "Active" to "Inactive."
3. Reset the user's account password.
4. Change the user's supervisor.

Go to the [USERS] tab and click on **User Management**. From the list, find the person whose account you want to edit. Click the 'Edit' icon to the right of the person's email address and this will take you to the account information.

1. To make changes, replace information in any available field and then click [Save], or click [Cancel] if you do not want to make changes.
2. To de-activate an account, change the User Status field from 'Active' to 'Inactive.'
3. To reset a password, click on [Reset Password]. A pop-up box will tell you that an email was sent to the person with a link to reset the password. Click [OK] and then click on [Cancel] to return to the previous page.

User Name: * tx_   monitor

Email: * imtzc10@163.com

First Name: * tx_

Last Name: * monitor

User Status: * Active ▼

State: * Texas ▼

User Group: * Monitor group ▼

CANS External User ID: * E

Expiration date: 08/31/2018

Supervisor: * tx_staff ▼

Agency: STAR Health ▼

[Reset Password]   [Save]   [Cancel]

Note: Always remember to click [Save] to save any changes that you make.

4.3 DE-ACTIVATING A USER ACCOUNT

When system users leave the agency or office, they may be transferring to another office or agency in the system or they may be leaving the system. Depending on how your system handles transfers, you may need to de-activate the user's account. De-activating an account means that the person is no longer able to get into eCANS with that login and password and can no longer see child information.

- You will de-activate an account when the person has left the agency/system.
- You may de-activate an account when the person is moving to another office/agency in the system and this person's caseload will be managed by someone else. De-activating the account at this office/agency and then activating a new user account for the new office/agency will remove the previous caseload and all CANS assessments from this person's **Assessment Lists**. However, this person will still have the ability to view previous assessments if necessary using the **Search Assessment** function.

To de-activate an account, go to the [USERS] tab and click on **User Management**, or click the button next to **User Management** on the [HOME] page and click [Go].

Search for the person's name using the search fields at the top of the page or in the list on the page. Choose the person whose account you wish to de-activate by clicking on the 'Edit' icon to the right of the person's email. This will take you to the account information.

User Name: * tx_ | staff

Email: * imtzc10@163.com

First Name: * tx_

Last Name: * staff

User Status: * Active

State: * Texas

User Group: * Direct Care Worker group

CANS External User ID: * T

Expiration date: 08/31/2016

Supervisor: * tx_director

Agency: STAR Health

Reset Password   **Save**   **Cancel**

Find the User Status field and change it from 'Active' to 'Inactive'. Then click [Save] to de-activate.

5. REPORTS

Please see separate document titled **TX eCANS Reports Manual** for available reports and instructions.

6. MY ACCOUNT

<u>EDIT YOUR PROFILE</u>

Once you log in to the system, you will see a tab called [MY ACCOUNT]. All users can edit their own profile by clicking on this tab. You will see the following screen:

You are able to edit your user name, email address, first name and last name. Click [Save] to save the changes. You are not able to edit the other fields unless you have special access. If you notice any errors in those fields, please contact the person who created your account.

Note that the fields with * are required, and therefore you cannot leave them blank.

<u>CHANGE PASSWORD</u>

Change your password by clicking [Change Password] on this page. You will be sent to a pop-up window to reset your password.

Enter your old password, set a new one, repeat the new password for confirmation and click [Save] to make the change. If you click [Cancel], you will return to the [MY ACCOUNT] page without a password change.