

CSA IT Applications

New Coordinators Academy - 2022

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CSA Main Website

www.csa.virginia.gov

Applications

- Local Government Reporting
- OCS Helpdesk
- CANVaS 2.0
- Policy Public Comments Form
- Virginia Learning Center (CSA)
- Service Fee Directory
- Training Calendar
- CANS Training
- Account Management System
- Virginia Systems of Care Website





What is the purpose?

- To create, manage and search existing user accounts in Local Government Reporting / Roster Reporting that is used by local government, agency staff and service fee directory.
- Depending on role, users are able to access various modules on Local Government Reporting, Account Management System and Service Fee Directory.



What are the features?

AMS allows users to:

- Create new user or system accounts.
- Search for existing user or system accounts.
- Manage an existing user or system account.
- Reset passwords on existing accounts



What are the benefits?

- Provides an organized way to create, manage, search or deactivate existing user or system accounts.
- Improves role assignment functionality.
- Consolidates actions on search results screen.



CSA maintains an on-line directory, of individuals filling a variety of local CSA roles including:

- CPMT Chair
- Fiscal Agents
- CSA Coordinator
- Report Preparers
- CANS Super Users
- Title IV-E File Uploader



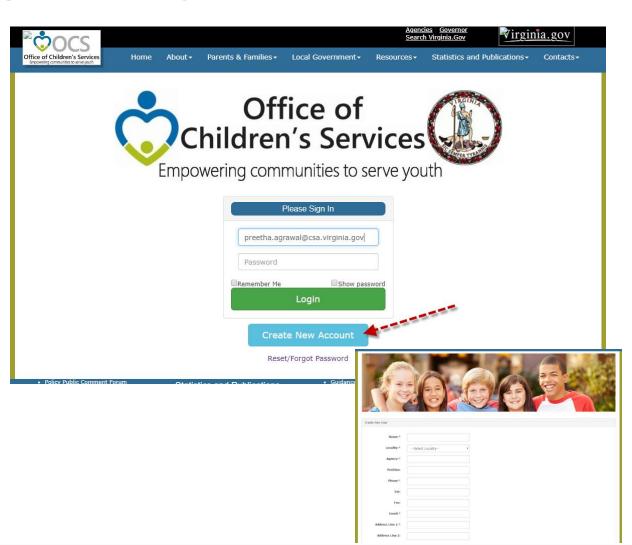
Create New Account Button

When User clicks on the Create New Account button.

The following screen is displayed.

The User needs to enter all the required data.

Click on Register button.





By Login to AMS Button (for users with existing registered account)

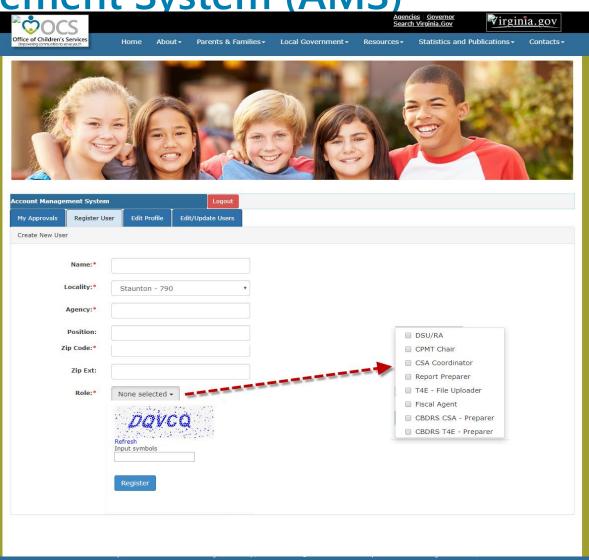
The User enters their registered email and password and clicks on Login button to log into the AMS account.

Clicking on Register User tab

The Create New Account page is displayed.

The User needs to enter all the required data.

Click on Register button.





AMS – Local Approver Screen CSA Coordinator and CPMT Chair My Approvals tab

Displays a list of Users in their *My Approvals* tab To Approve or Reject a request click on the review icon in the far right column.

A popup screen to Approve or Reject the User is displayed.

Once the User is approved the User will no longer appear in the Approvals list

When the State Approver approves the User (the next step in the process), then the User will be displayed in the Local Government Contacts screen for the Locality.

The User is full approved, the User shall also receive an email notification to create credentials to access the system.

If the User is rejected by the Local Approved or State Approver. An email is sent to the User with the Reject reason stated.



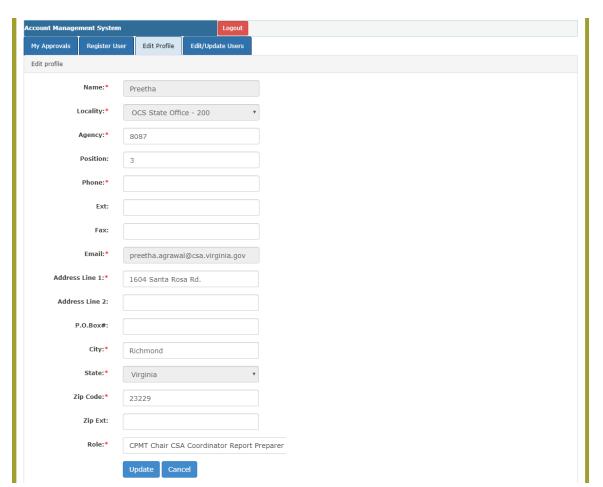


Edit Profile tab

Local Approver's and established users have access to Edit their Profile.

The User can edit / modify the user's own profile details.

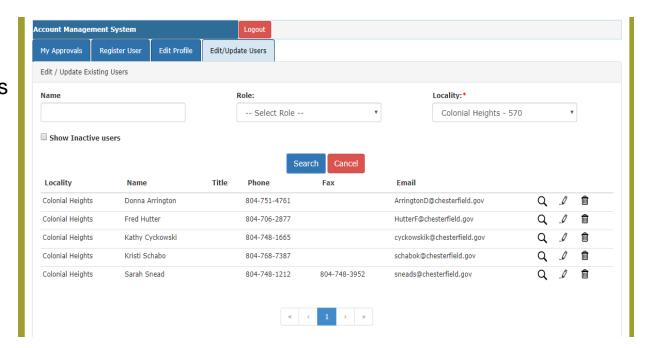
After needed changes are entered, click on the *Update* button





Edit/Update Users tab

Local Approver's have the *Edit/Update Users* tab. This tab will display list of all Users in the locality. This tab has three important features.





- The View (Magnifying Glass icon) is used to view the details of a User.
- The Edit (*Pencil icon*) is used to Edit the details of a User. It can be used to:
 - i. Edit User Information
 - ii. Add User roles
 - iii Delete User roles
- The Delete (*Trash Can*) icon is used to Delete/Deactivate a User in the AMS. When the following message is displayed, the User will have to click on the OK button,. Once a User is





Keeping the AMS Up to Date

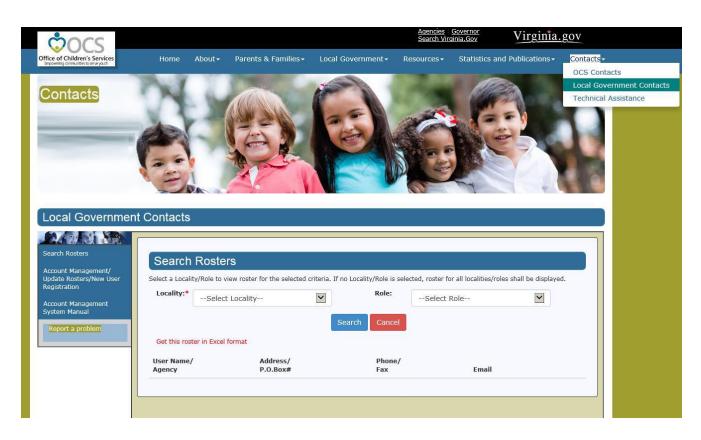
- It is the responsibility of the locality CSA Coordinator to keep these rosters current and accurate.
- Request to make additions/deletions/changes to the directories, can be done by any individual, but these changes go through an Approval flow in the Account Management System (AMS) where the data resides



AMS – Search Roster

The Local Government Contact Screen is as shown below. The Rosters section has the following features:

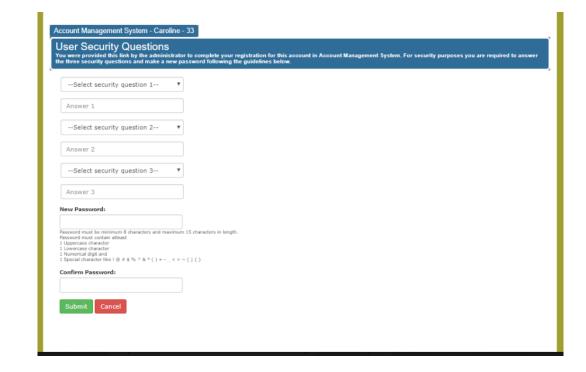
- 1. Search by Locality and/or Role
- 2. Sort the data displayed on the screen
- 3. Export the searched data (to an Excel file)





User Security Questions/Password for New Users

- To establish password
- To establish security questions





Reset/ Forgot Password

If you are a registered User and cannot remember your Password. Click on "Reset/Forget Password."

- 1. Select your Locality
- 2. Enter your email address
- 3. Click on Submit

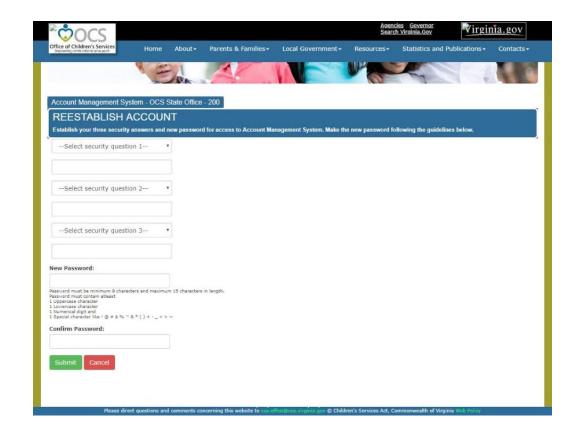
To your registered email address, an email with instructions is sent, on how to proceed.





Reestablish Account

- Redo security
 Question / Answer
- Set new password





Depending on the Role requested an approval request notification is sent to either Locality's CPMT Chair or Locality's CSA Coordinator.

CPMT Chair – CSA Coordinator & Fiscal Agent CSA Coordinator – All other roles

The Local Approver will need to login into the AMS system and approve the new User.



LEDRS - Crosswalk





LEDRS Crosswalk - Service Name Code Addition

Code Description

43	Multisystemic Therapy (MST)	
44	Functional Family Therapy (FFT)	
45	Parent Child Interaction Therapy (PCIT)	
46	Cognitive Behavioral Therapy (CBT)	
47	Motivational Interviewing (MI)	
48	Public School Special Education Transition	
49	KinGap Basic Maintenance	
50	KinGap Enhanced Maintenance	



Local Expenditure, Data Reimbursement System (LEDRS)

File Naming Convention			
File Type	text file	txt	
File Delimiter	(pipe)	1 123456789 Anna Bell Thomas	
File Naming Convention	CSA		
r no realining convention	CSA_Fips_Frequency_Year_Period_Report#.txt	File Name eg> CSA_1_M_2016_10_1.txt	
		Fips = County Fips Code (no padding of zeros)	
		Frequency = M (Monthly)	
		Year = Year of the file submission; calendar year	
		Period = Month# of the calendar month; incase of Monthly submission	
		Report# = Only ONE file submission is allowed for months 1, 2, 3, 4, 5, 6, 7, 8, 10, 11, 12.	
		MULTIPLE File submissions are allowed in the month 9. Maximum of 3.	
	Title IV-E		
	T4E_Fips_Frequency_Year_Period_Report#.txt	File Name eg> T4E_1_Q_2016_1_1.txt	
		Fips = County Fips Code (no padding of zeros)	
		Frequency = Q (Quarterly)	
		Year = Year of the file submission; calendar year	
		Period = Quarter# of the reporting quarter in case of quarterly submission; Sept - 1; Dec - 2; Mar - 3; Jun - 4	
		Report# = Only ONE file submission is allowed for a quarter	



Crosswalk

Service Name vs. Service Placement Type

http://csa.virginia.gov/content/pdf/LEDRS.xlsx



Crosswalk

Expenditure Category vs.

Service Placement Type



Crosswalk

Expenditure Category vs.

Mandate Type



Local Government Reporting

- LEDRS submission
- Pool Reimbursement Approval
- Additional Supplement
- Admin Plan
- Medicaid Reports
- Other Reports
- AMS
- T4E File Transfer



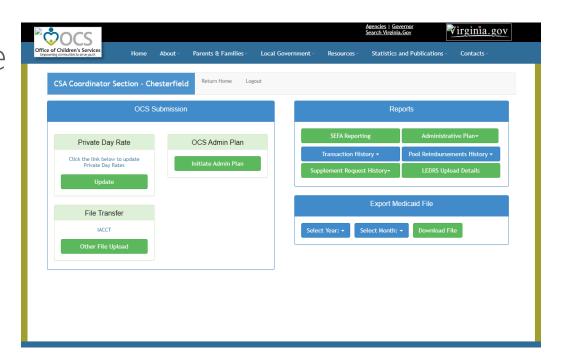






CSA Coordinator Section

- IACCT File Upload
- OCS Admin Plan
- Reports
- Export Medicaid File





Local Government Reporting

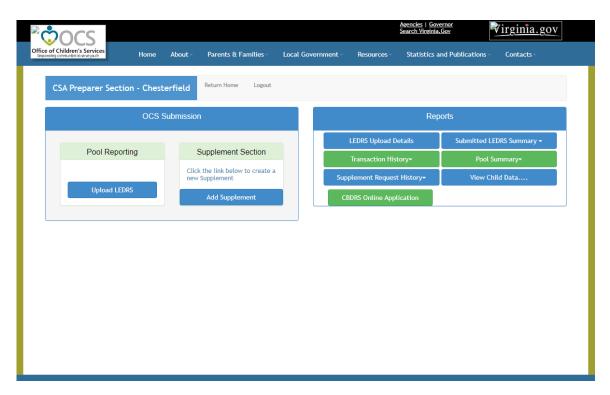
Report Preparer





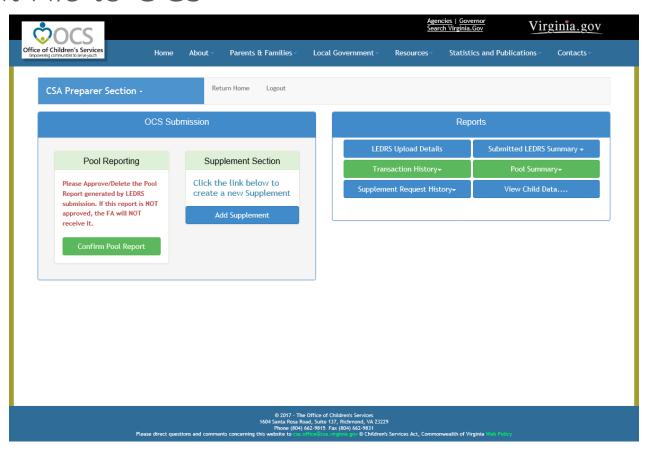
CSA Report Preparer Section

- Upload LEDRS
- Add Supplement
- Reports



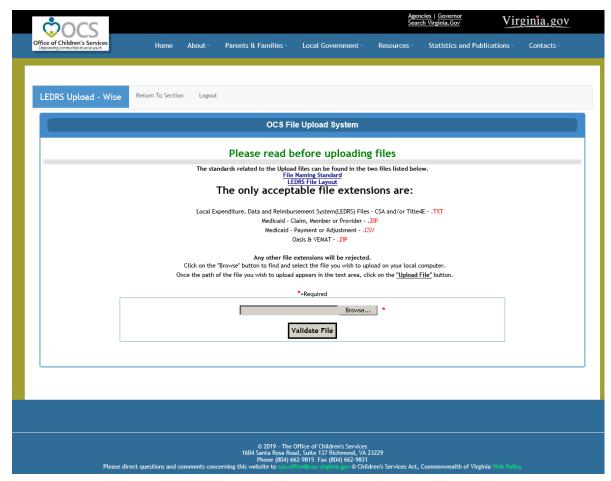


Submit File to OCS



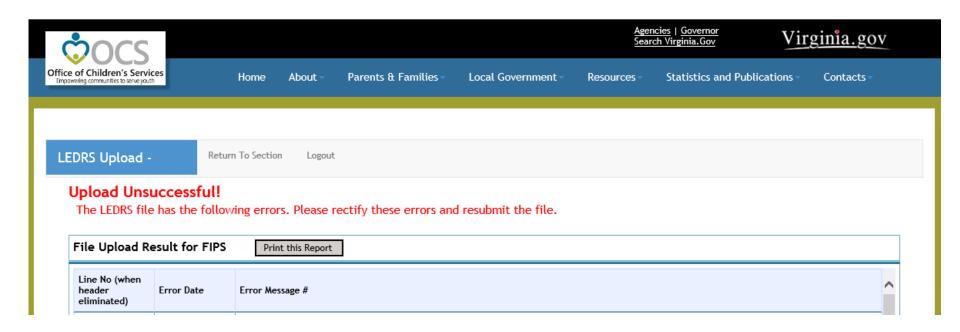


- Browse
- Validate File



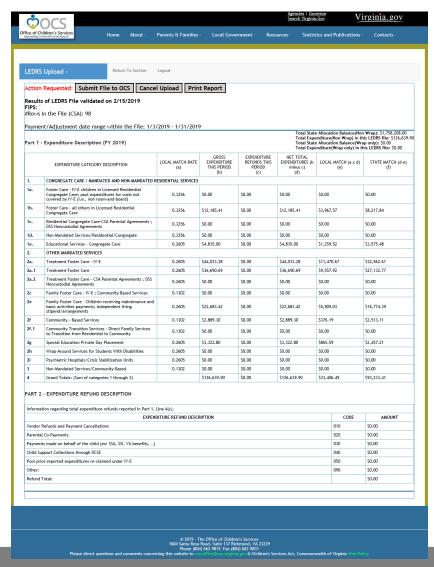


Upload Error



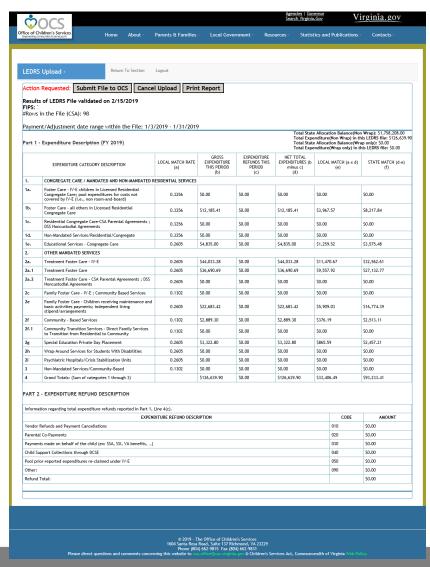


Upload Success



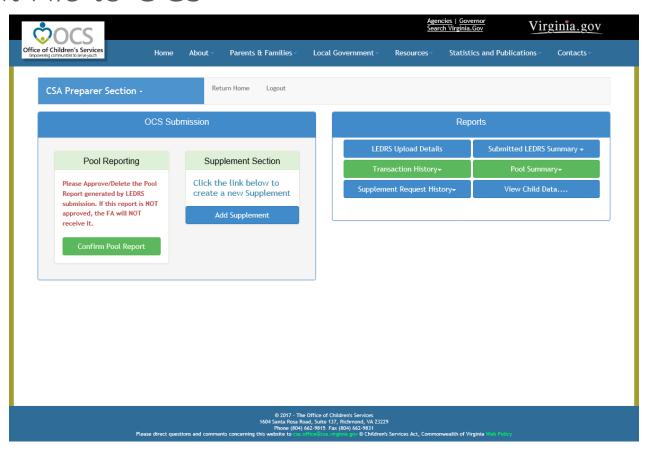


Upload Success



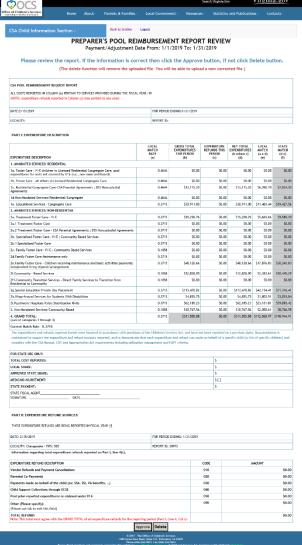


Submit File to OCS





 Approve Pool Report





Local Government Reporting

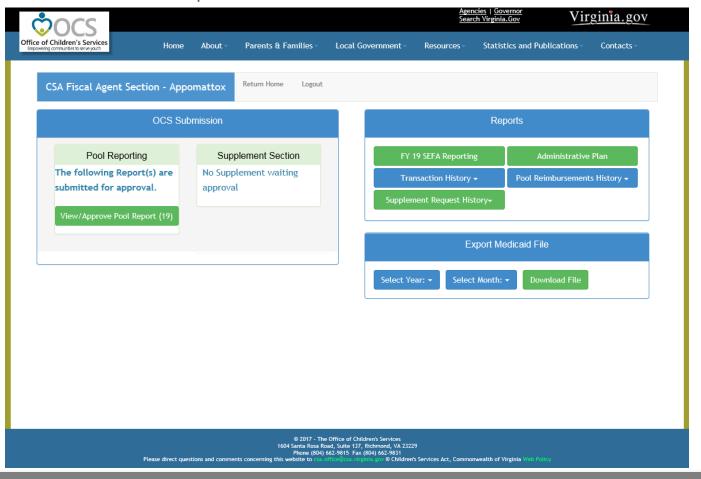
Fiscal Agent





CSA Fiscal Agent Section

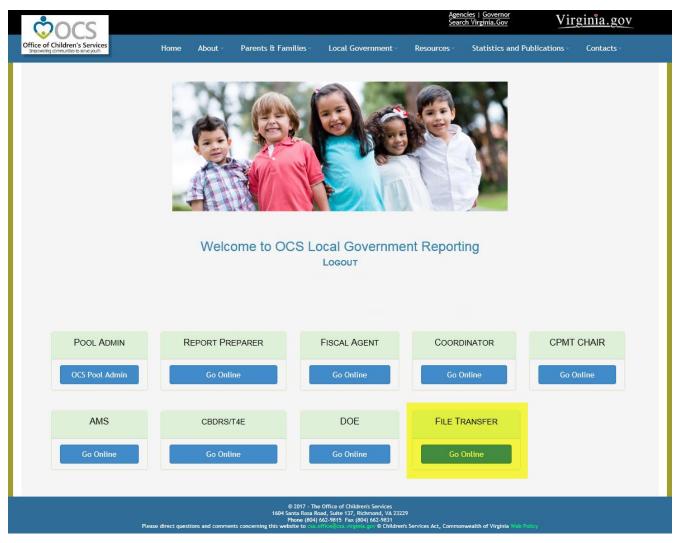
Approve Pool Report





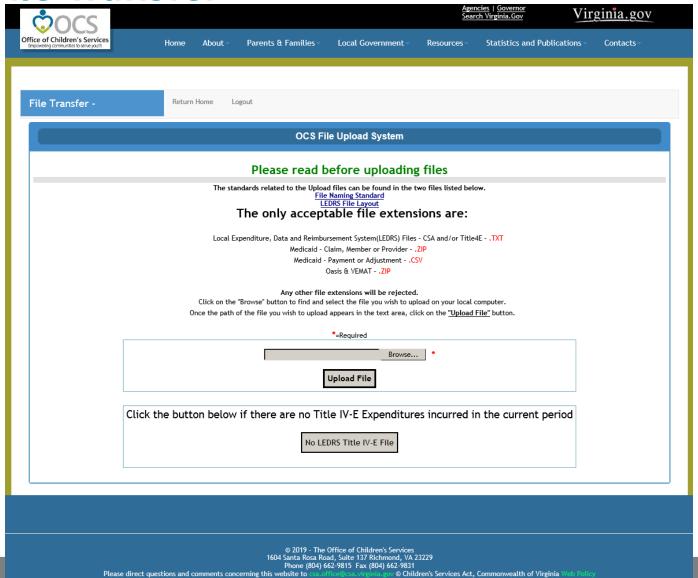
Local Government Reporting

• File Transfer



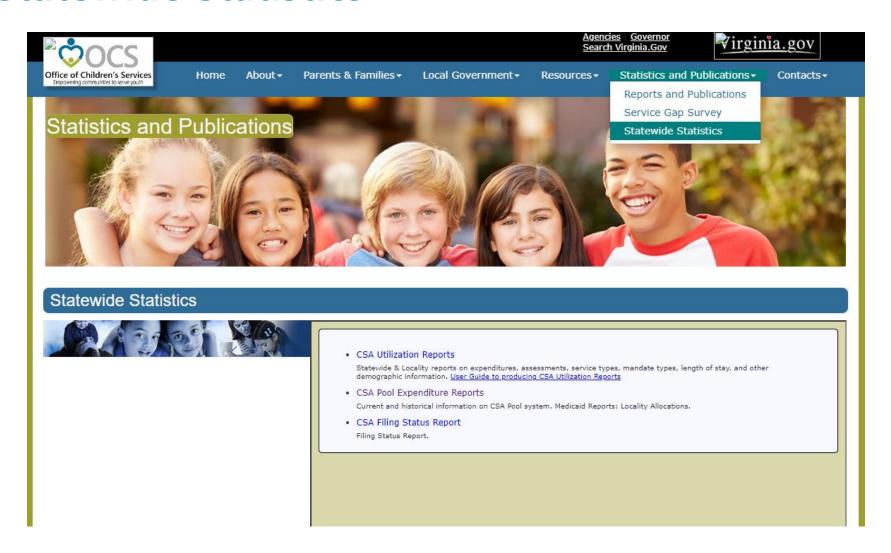


CSA File Transfer

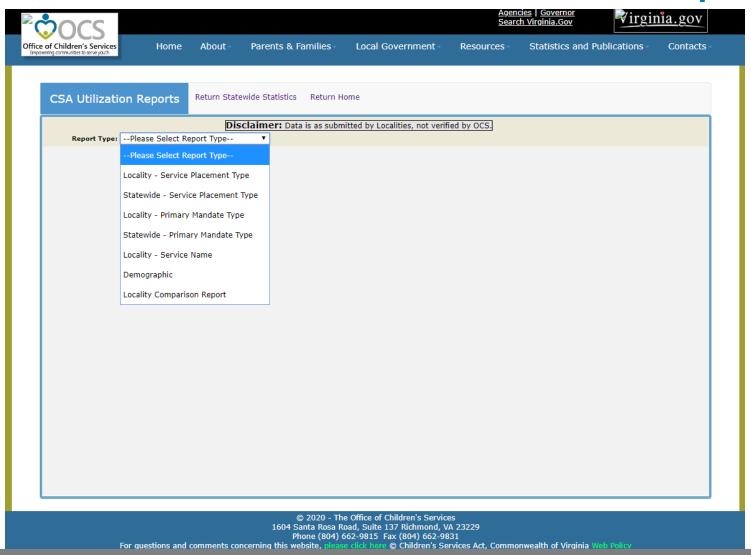




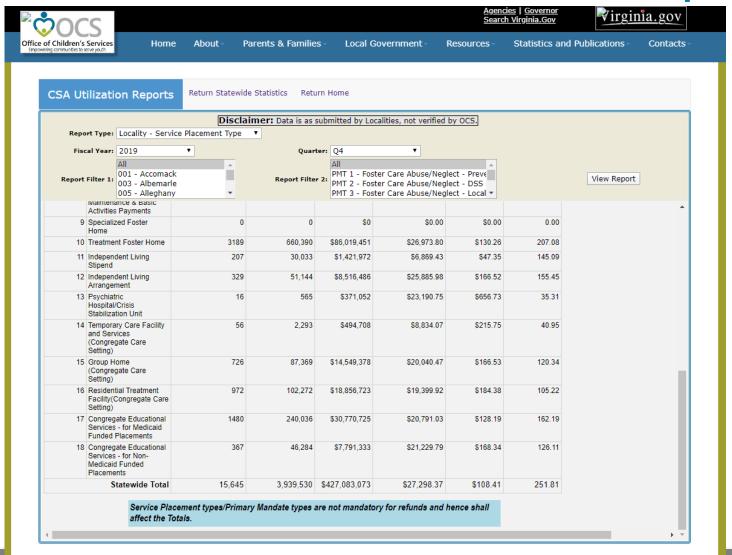
Statewide Statistics



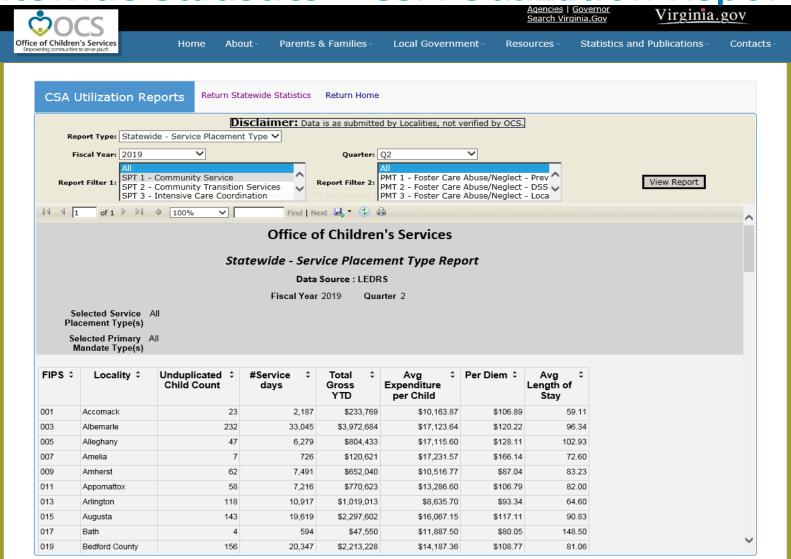




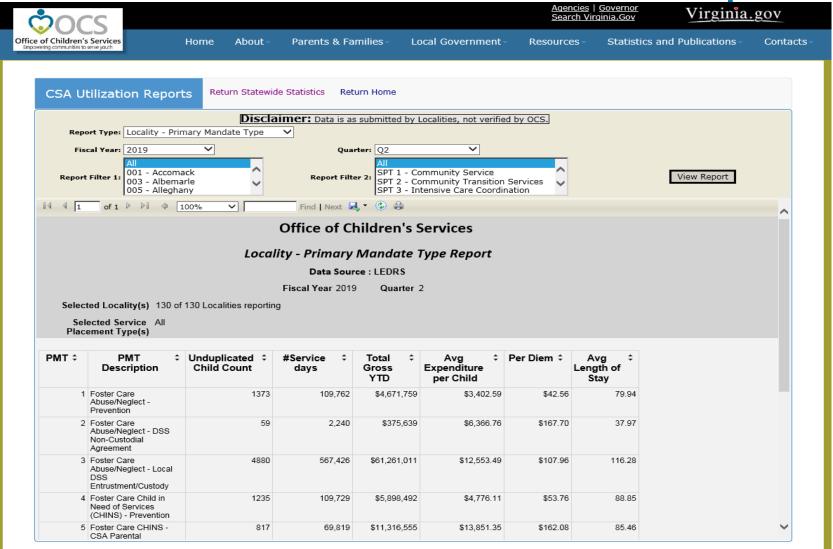




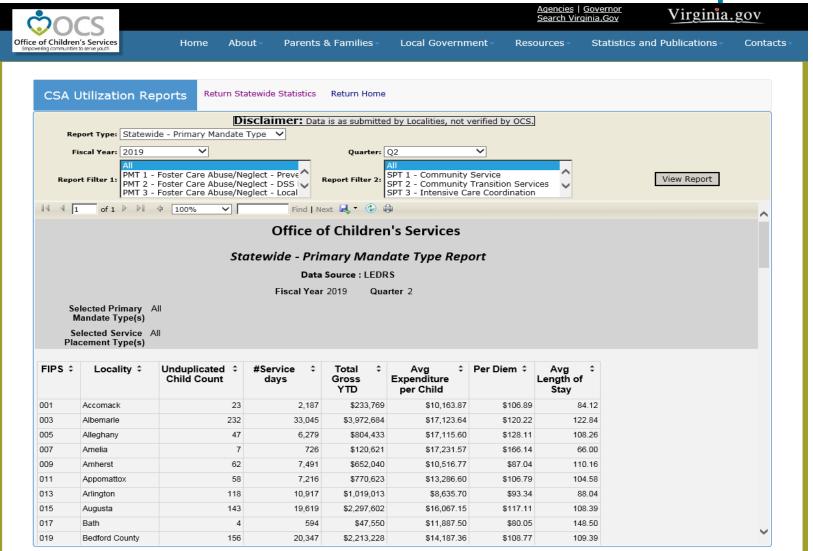




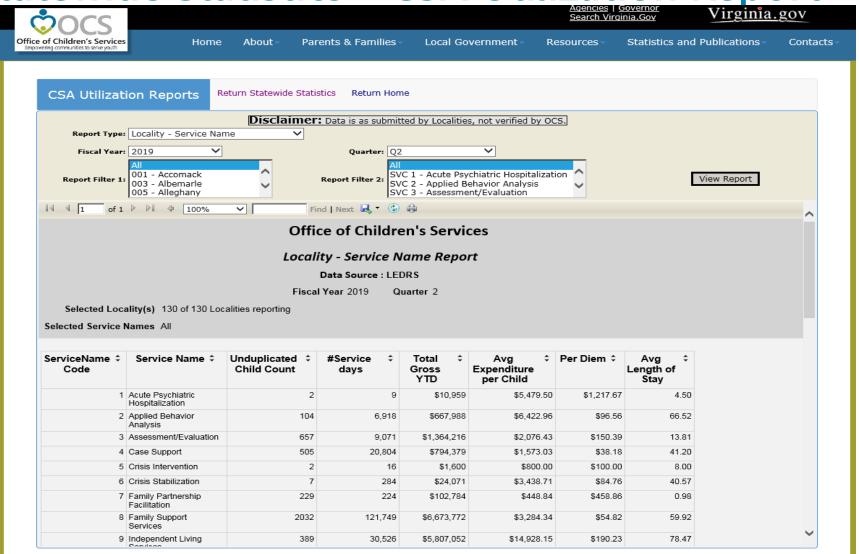




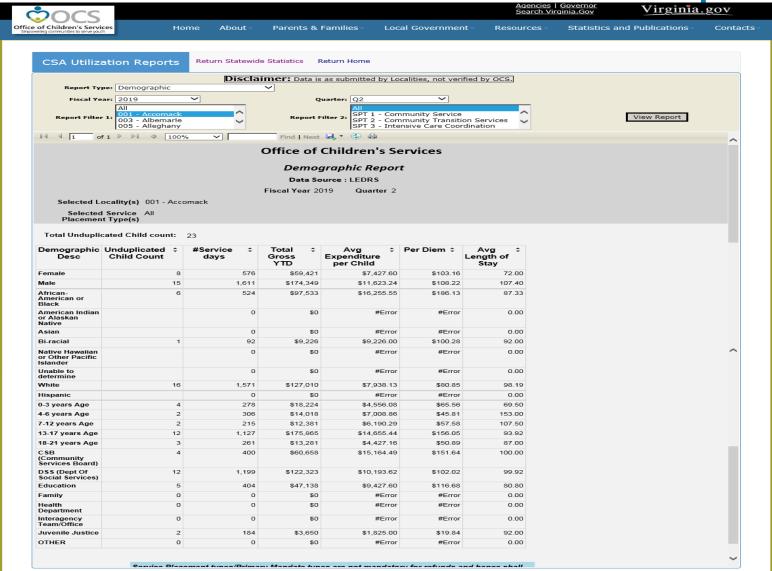




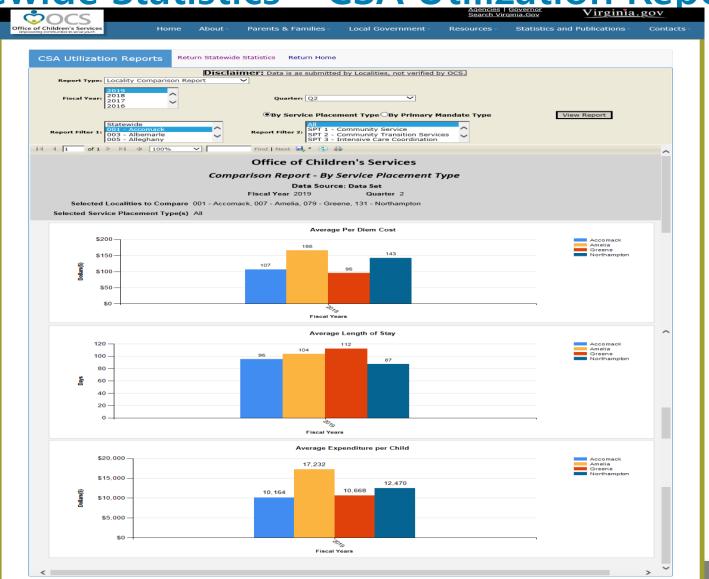














Data Security

- CSA is NOT on a private network. All communications to and from state and local is transmitted through the Commonwealth's enterprise network along with communications to and from many other state agencies.
- In order to protect the confidentiality of sensitive information (e.g. Personally Identifiable Information (PII): Name, Address, SSN, DOB, Phone#, OASIS Id etc.) transmitted in electronic communications, it is necessary to encrypt the sensitive information prior to transmission.
- Use Microsoft File Encryption to encrypt sensitive information that will be sent over the Internet.



For more information:

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