Getting Started…with CANVaS 2.0
Designated Super User/Report Administrator (Local Administrator)

This document is a basic outline for existing CANVaS DSU/RAs. For a full explanation of how to use the CANVaS 2.0 website, please refer to the CANVaS 2.0 *User Manual*. For assistance contact the CANVaS Help Desk at 1-877-727-8329 or by e-mail at canvas@rcrtechnology.com

If you are an existing Designated Super User/Report Administrator for CANVaS

Your account(s) and any assessments you have entered will transition to CANVaS 2.0.

Case manager account(s) and assessments will also transition to CANVaS 2.0.

The CANVaS URL is https://www.csa.canvas.virginia.gov Users will be redirected from the existing CANVaS URL to this one.
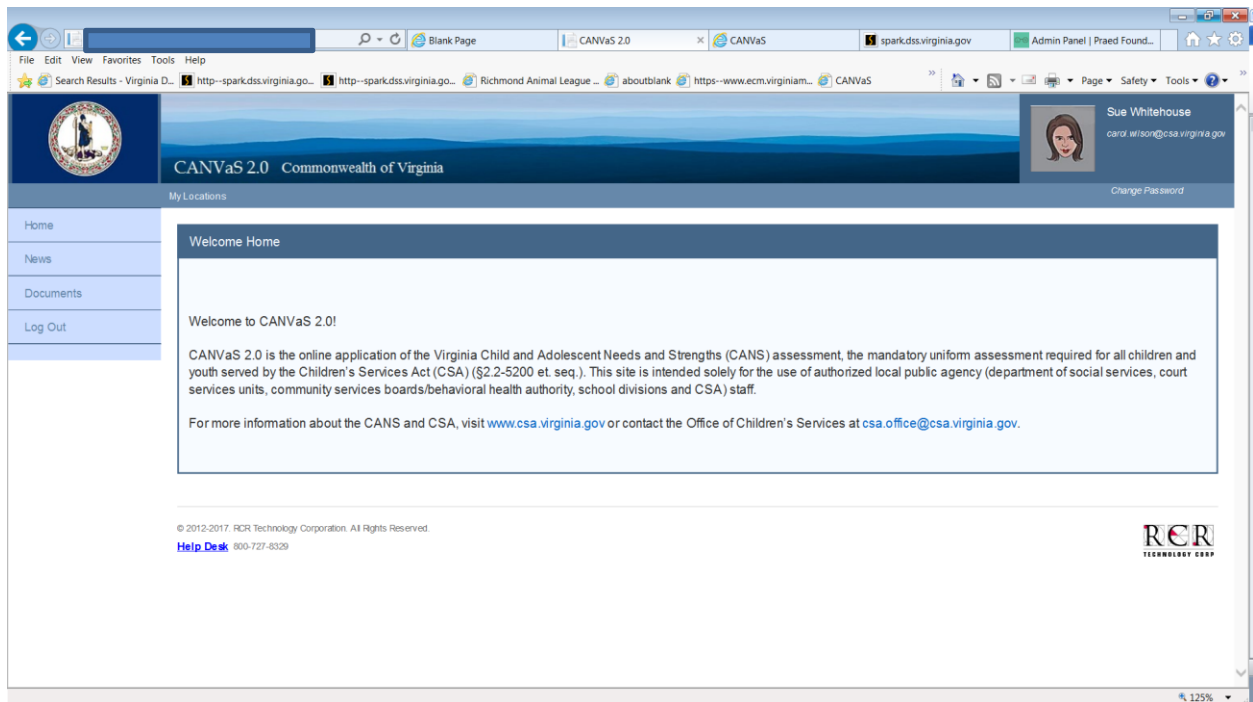
The log-in page looks like the below screenshot.

Enter your existing CANVaS user name and password.

Click on "Log-in" on the menu on the left side of the page or simply click on "enter."
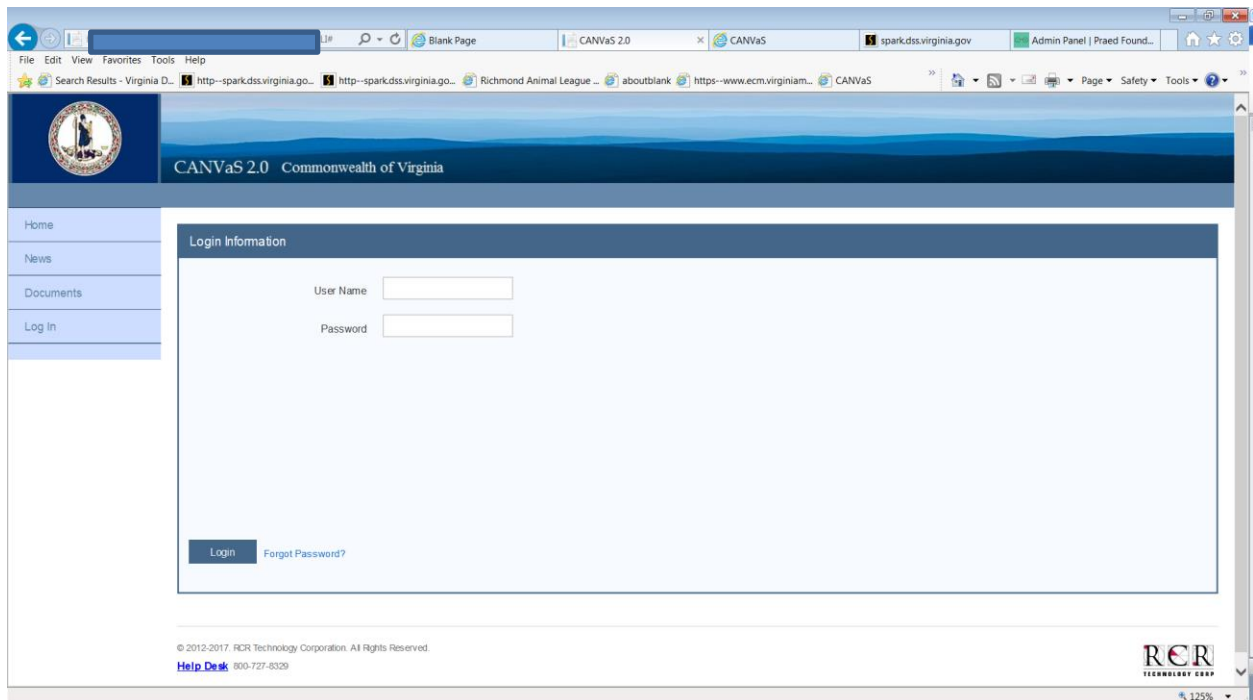
The next page (the home page) looks as follows:

Because of the conversion from CANVaS 1.0 to CANVaS 2.0, you will be asked to create a new secret question/answer. Please follow the on-screen prompts to do so.

You will then also be asked to agree to the CANVaS 2.0 User Agreement. You must read the agreement and check the box. You may also print the user agreement. Please be sure you understand your responsibilities regarding access and use of CANVaS 2.0. Access to CANVaS 2.0 may be revoked at any time by the system administrator. Failure to honor the user agreement will result in loss of access to CANVaS 2.0.

Next, click "Activate Account" in the lower left-hand corner of the screen.
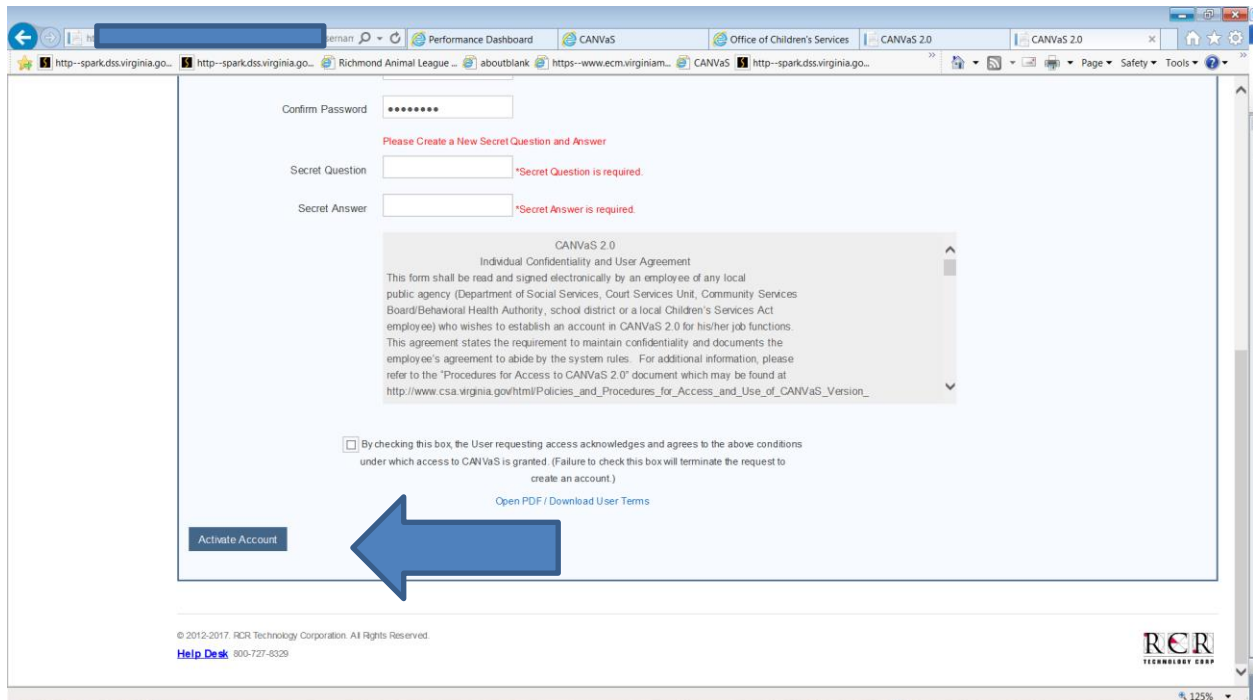
You will be returned to the home page to access your account(s).

Case managers with existing CANVaS accounts will also be required to re-set their Secret Question/Answer and read and acknowledge acceptance of the Individual Confidentiality and User Agreement.

If you are a Local Administrator in only one locality you may now access your account to complete all the necessary functions (e.g., search and/or add users and children, create assessments, print assessments and other reports). Skip to page 5.

If you are an existing local Administrator in multiple localities, your accounts will have been merged. To access one, do the following:

- You will notice on the upper left side of the screen a tab entitled "My Locations."
- Click on the tab to "Choose Location."
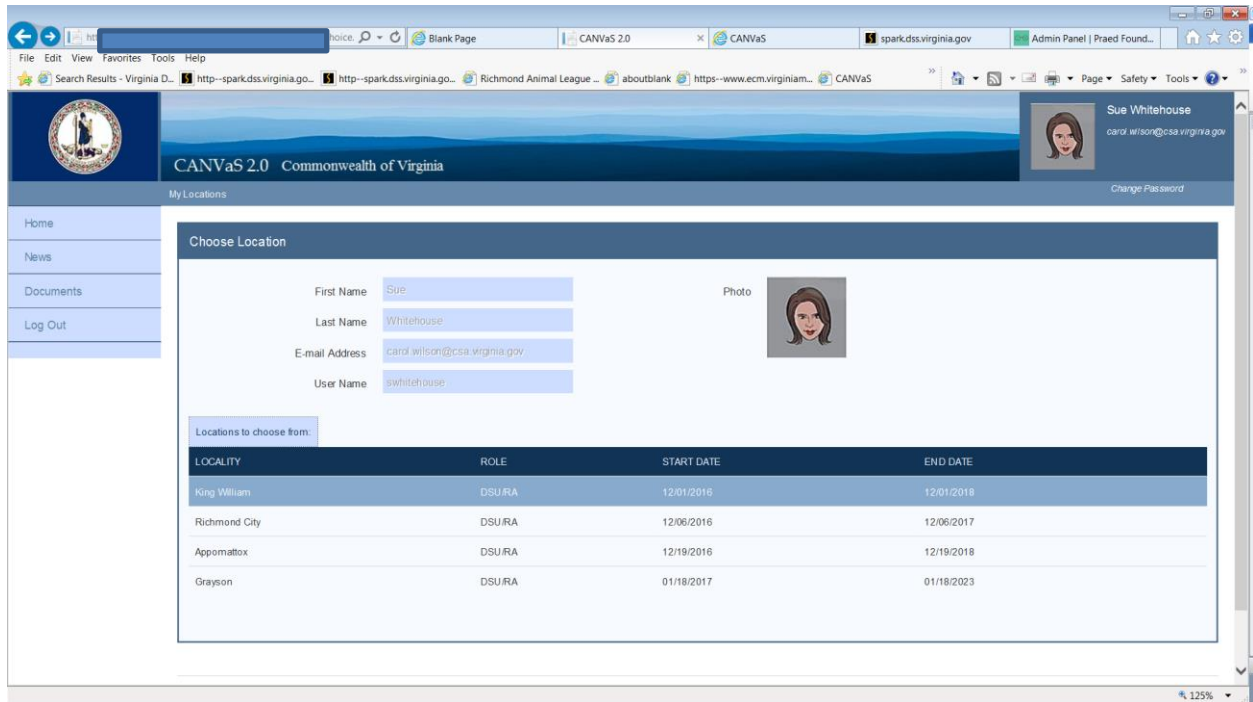- You may only access one location at a time.
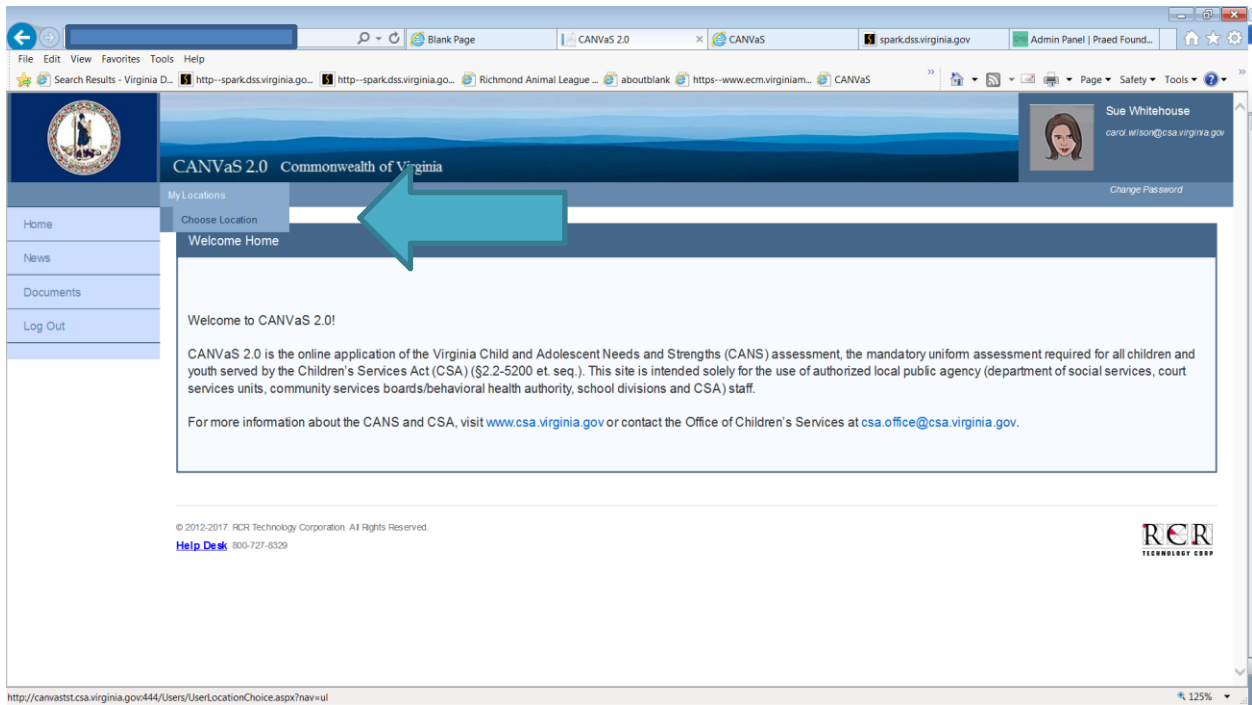
When you click on "Choose Locations" the display will show all localities for which you have an account.
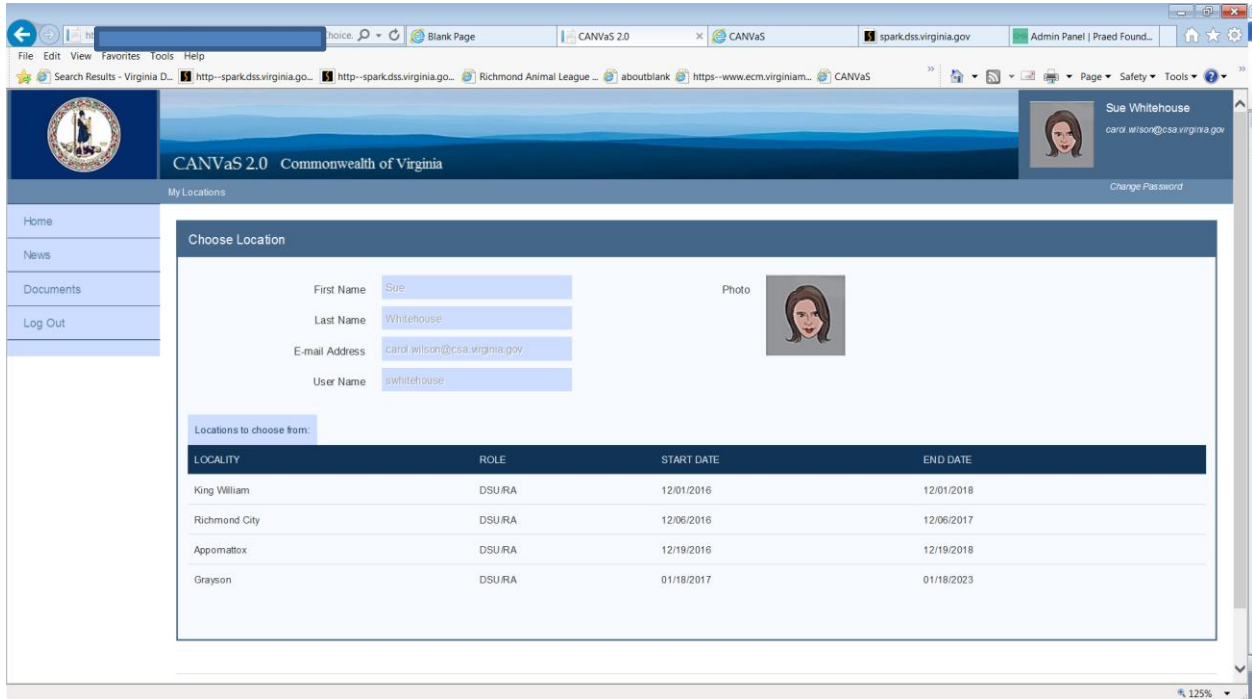

This user is listed as a DSU/RA in four localities.

Mouse over the bar for the locality you wish to select and click on the bar. In the screenshot below, King William has been selected.
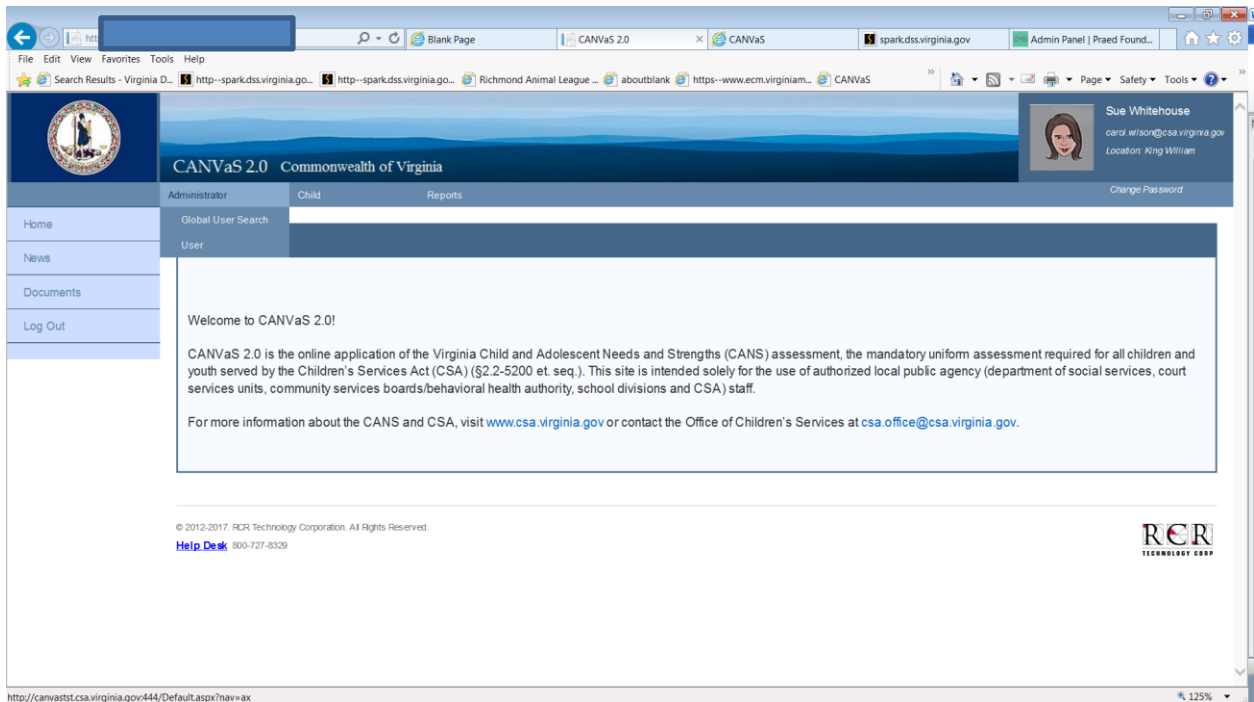

You will be returned to the home page. Please note the three tabs (Administrator, Child and Reports) along the top of the screen.
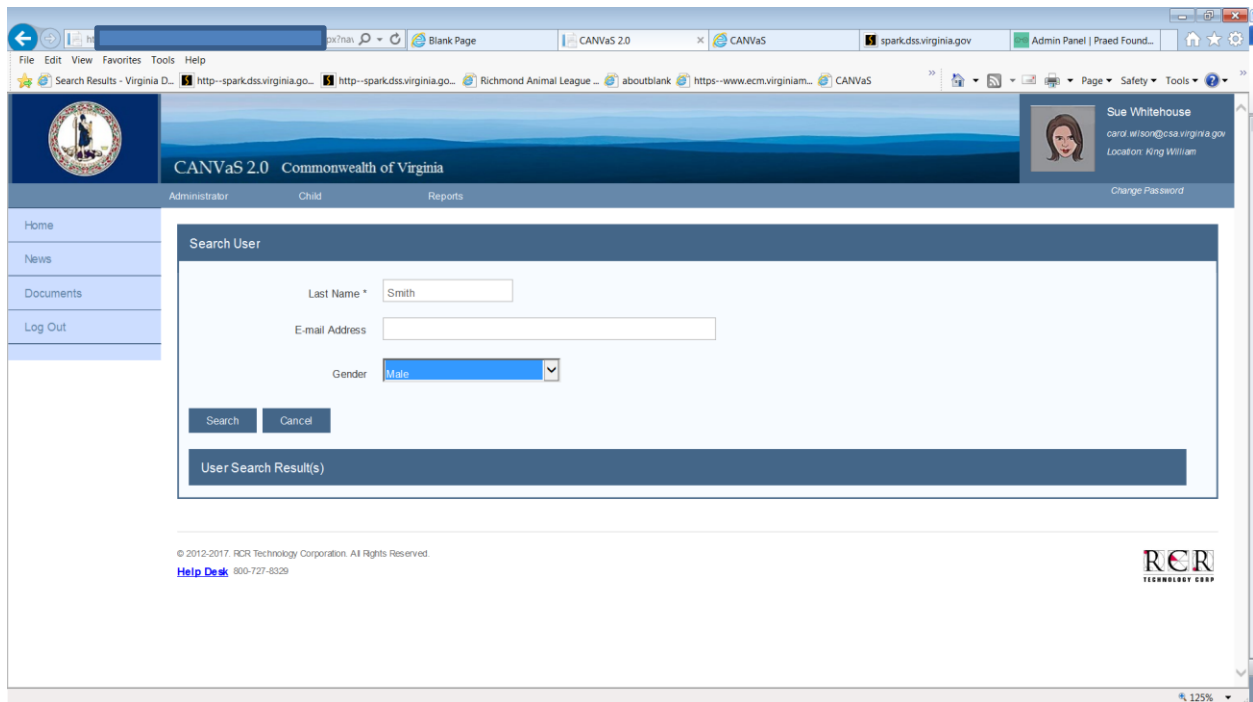
If you are a DSU/RA in only one locality, you will see these three tabs on the top of the screen when you log in.
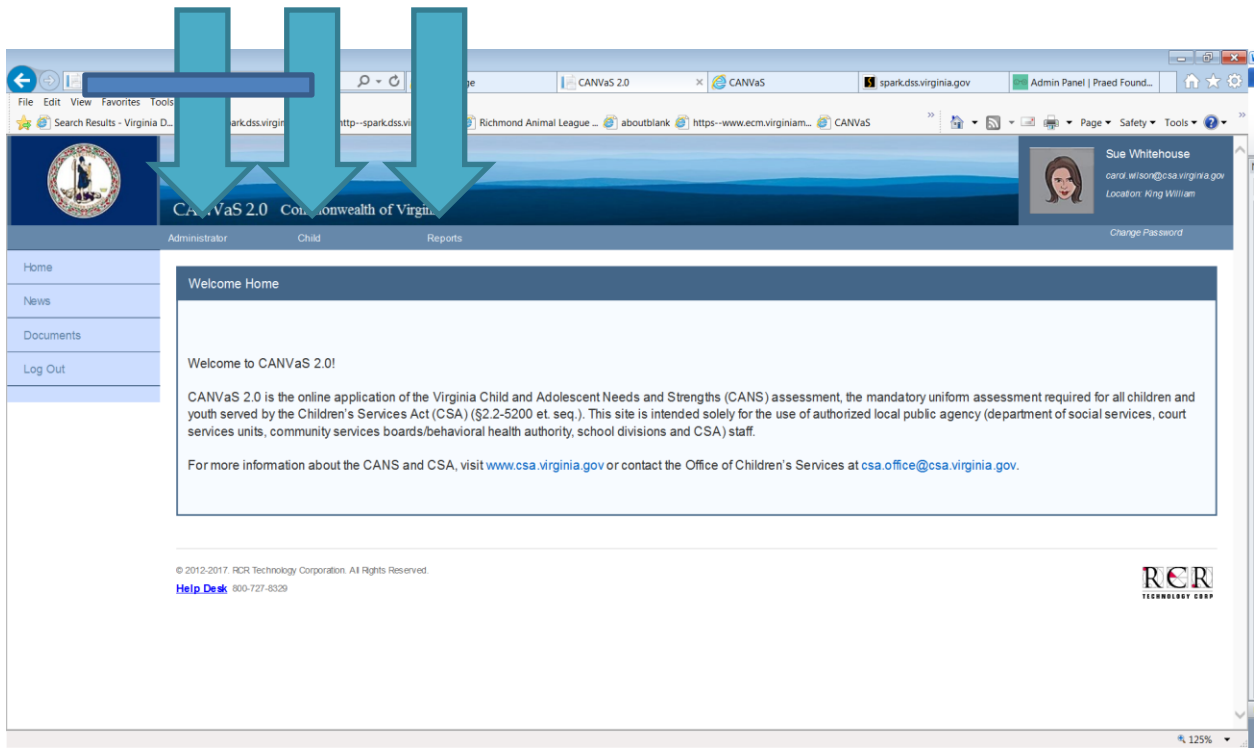
There are two options to search for users on the "Administrator" tab ("Global User Search" and "User").

If you select "Global User Search" you may search for a CANVaS user anywhere in Virginia.

Click "search." The display will show all users <u>statewide</u> who meet those criteria selected. The users will display in a table with first name, last name and status of "Active" or "Inactive." Remember, users should never be **deleted** from CANVaS as the assessments that user entered will also be deleted. Instead, users who no longer need access are **deactivated**.
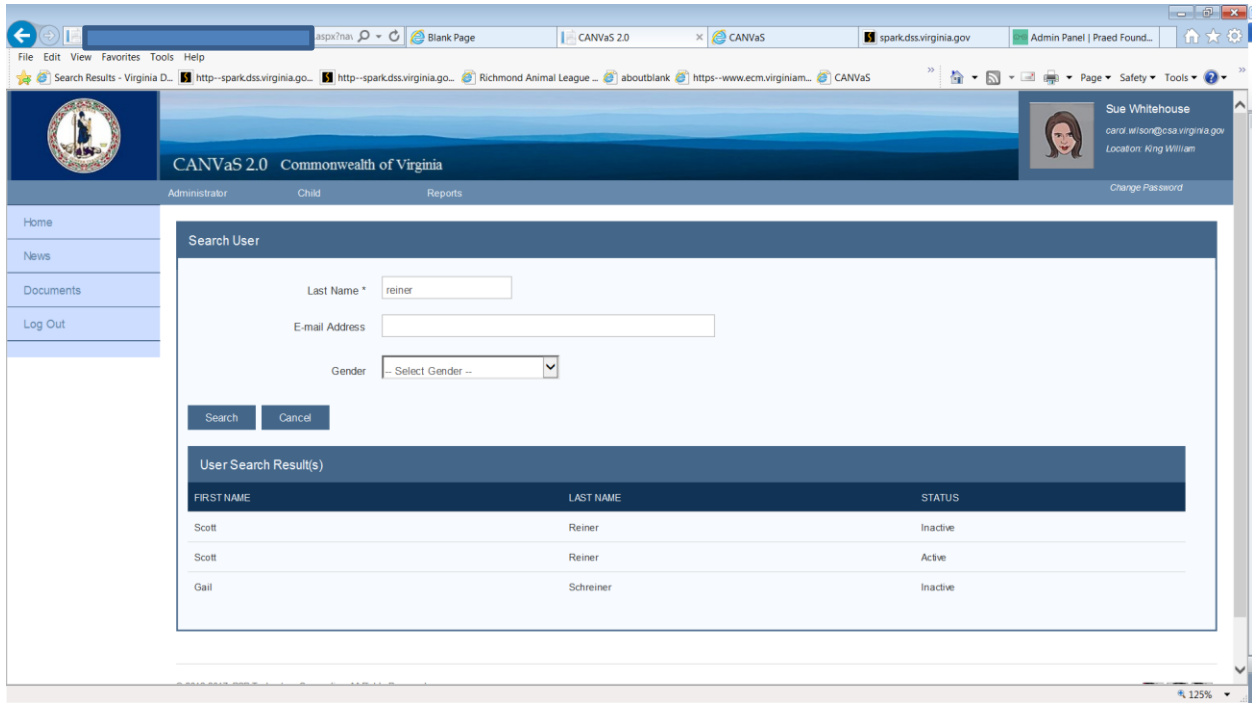
Or on the Administrator tab, you may select "User." This table displays all the users for this locality. First and last name, user name, e-mail address and status (active or inactive) are shown. (Individual user information is blocked for the below screenshot.)
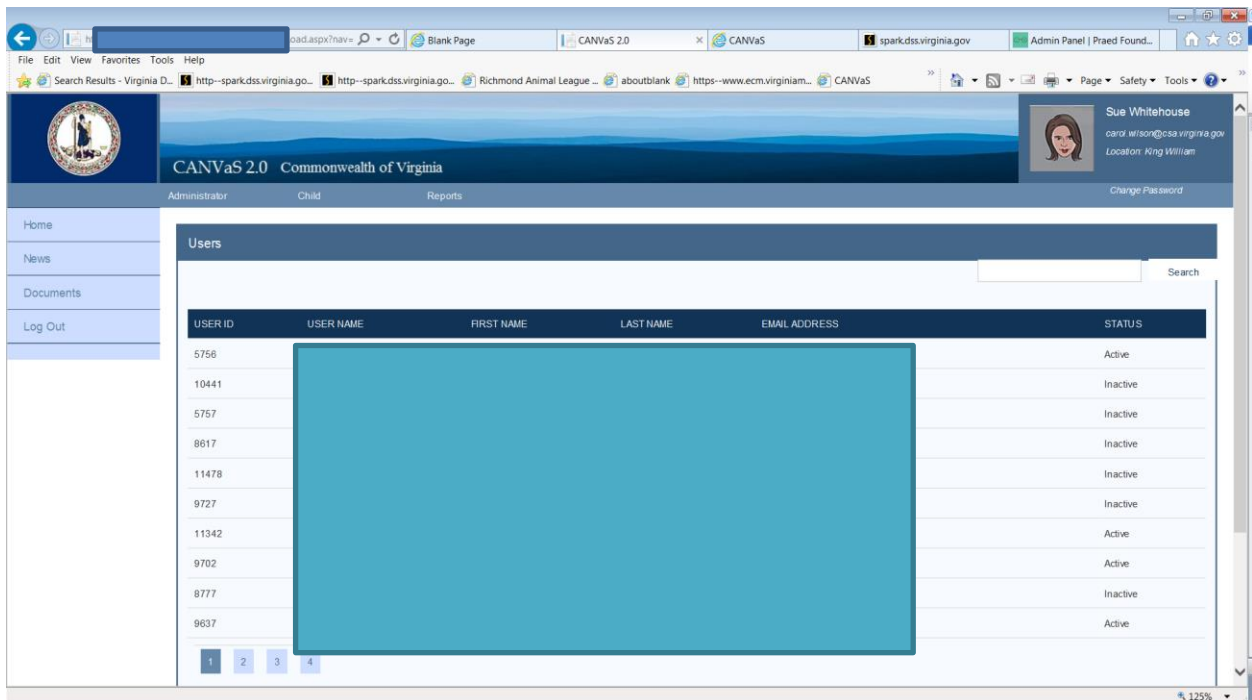
How to Add a New User

Existing CANVaS user accounts and assessments from CANVaS 1.0 will transfer to CANVaS 2.0. But how do we add new users in CANVaS 2.0? With CANVaS 2.0, instead of signing, collecting and sending case manager agreements to the Help Desk, you will create the local user's account in CANVaS.

Users will need to complete a one-page form ("Request to Create a New Case Manager Account") and send it to you, along with a copy of their CANS certification(s). You will use this information to create the accounts.

As with CANVaS 1.0, the first step for a prospective new CANVaS user is to complete the training and certification process found on the Praed Foundation's training site at www.canstraining.com Once certified, the user should print a copy of his or her certification. A new one page form "Request to Create a New Case Manager" account must be completed and signed by the staff person and his or her agency supervisor. The new staff person must submit this completed form and a copy of his or her certification to the local Administrator, the DSU/RA.

So, what does the DSU/RA do then? How do you create an account? Fortunately it's easy.

Once you have determined the user does not exist in the CANVaS system (through the search features above), you should

- Go to the listing of all users in your locality ("User" tab under "Administrator")
- Click on the "Add" button at the bottom of the screen.

The "Add User" screen will display.

Enter all of the required (*) information for this user. Be sure to enter the user's e-mail address (not your own). The new user must provide a user name on the request form. If the user name selected is already in use, a message will display "User Name exists; please create/enter another User Name."

Do not enter the PRAED ID on this screen.

Click "Save".

Next enter a location and role for this user. As a DSU/RA you may only add case managers. The locality tab will default to the current locality (in this case "King William").   The "start" date defaults to today's date. Do not enter an end date. (This is not the certification expiration date.)
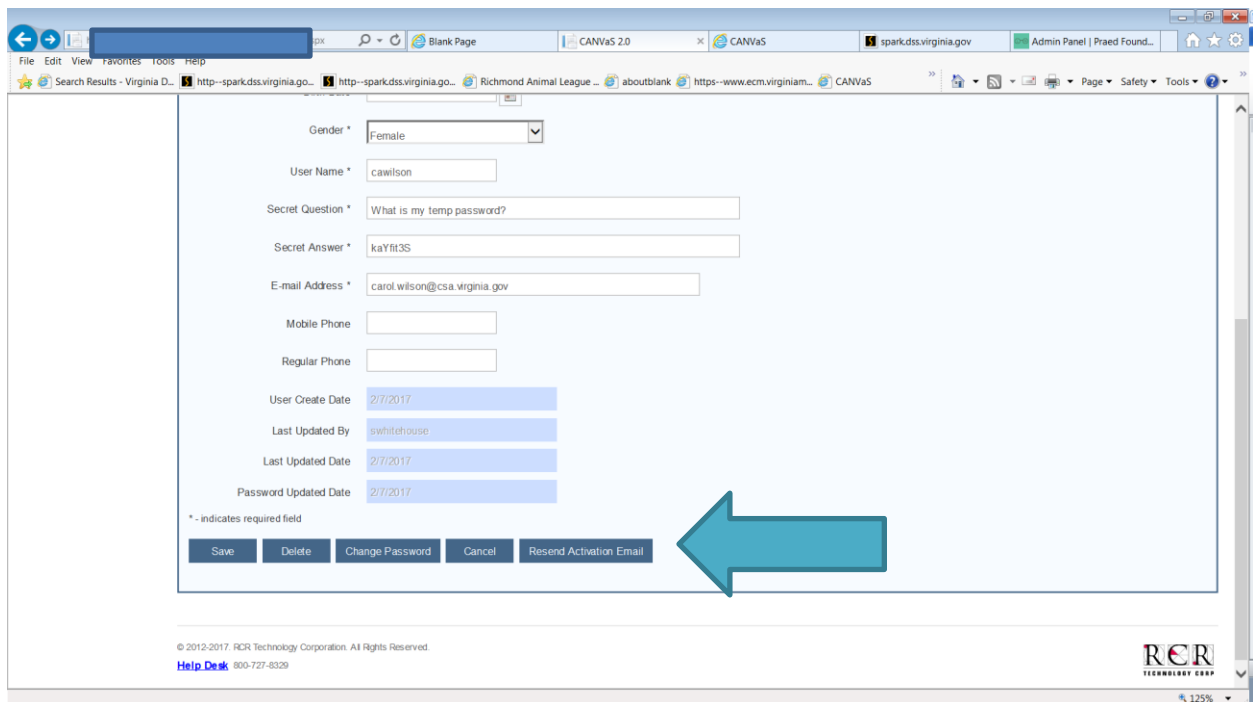
Click "Add."

You will be returned to the user's information page. King William is now listed as the user's locality. At this point, click "Edit." ***VERY IMPORTANT*** On the user's printed certification, there is an "External User ID" provided. Please enter this number in the PRAED ID box on the "Edit User" page. This is not the same as the individual's certification number or certification date. However, if this number is not entered, the system will not be able to capture the user's certification information or update the user's CANVaS account when the user recertifies.

This page will also provide a temporary secret question and answer for the user.

The user will receive an e-mail with a link to create log-in ID within seconds of your completion of the location page. If the user does not receive the e-mail, there is a "Resend Activation E-mail" you may click to try again.

The e-mail the new user will receive looks like the below screenshot.
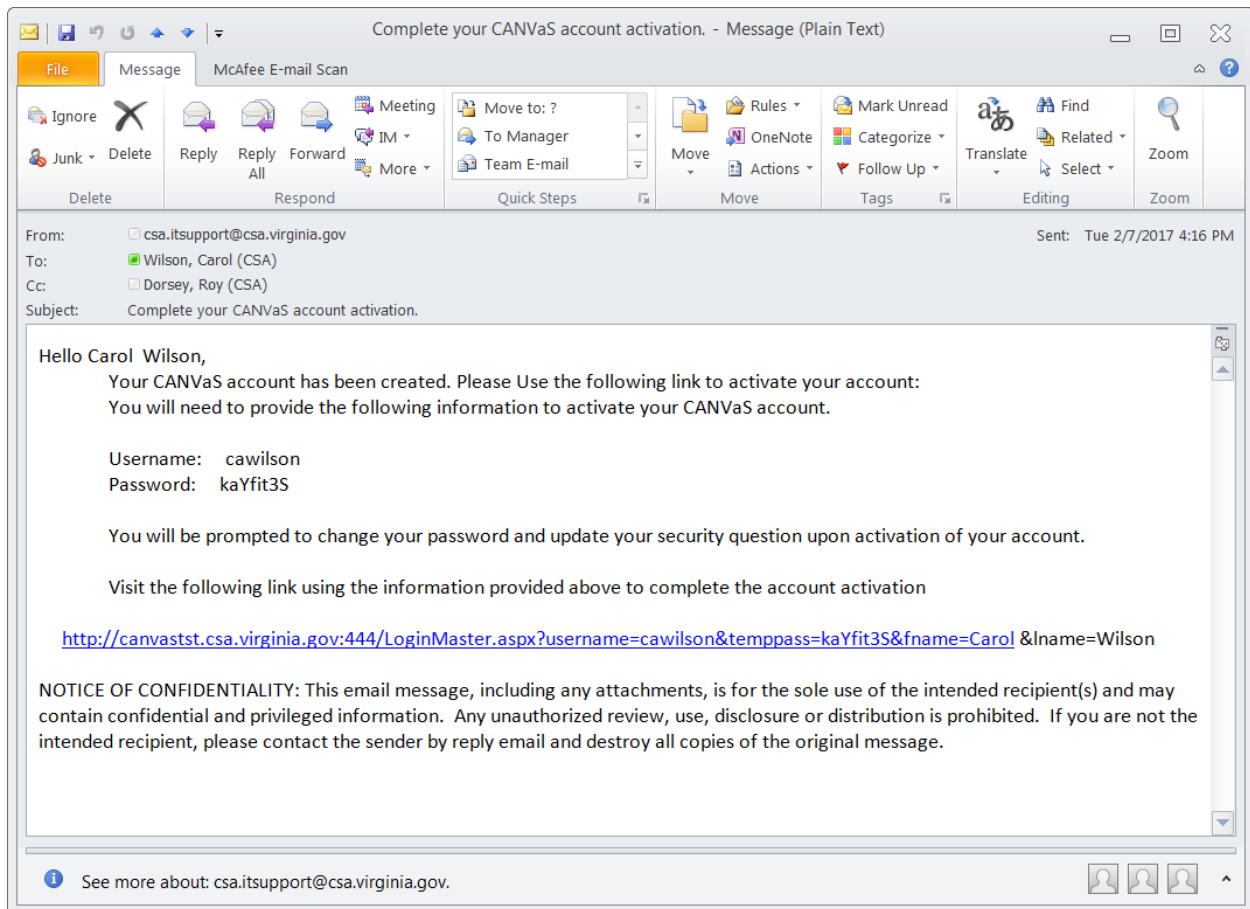
The user must click on the link. He or she will receive the following page.
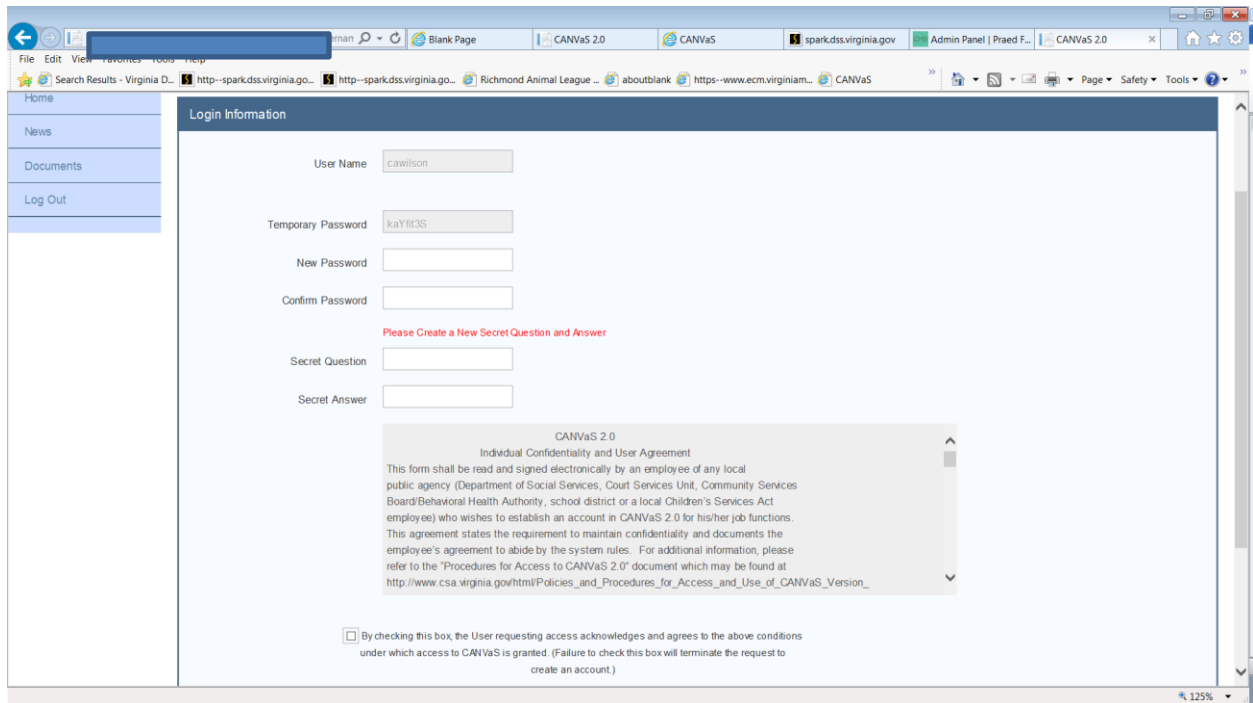
As you can see, the user must create a password and a new secret question/answer. He or she must also read the CANVaS 2.0 Individual Confidentiality and User Agreement, and click the box acknowledging that the user agrees to these conditions.

The user will then click "Activate Account" and will be directed to the log in page.

If the case manager works in multiple localities, if the DSU/RA is a DSU/RA for all those localities (for example, Staunton/Augusta/Waynesboro) then that DSU/RA will be able to create the account and add all three localities.

If the case manager works in multiple localities, but with different DSU/RAs, only one DSU/RA will need to create the account. The DSU/RAs in the other localities will simply add their locality to the user's account.
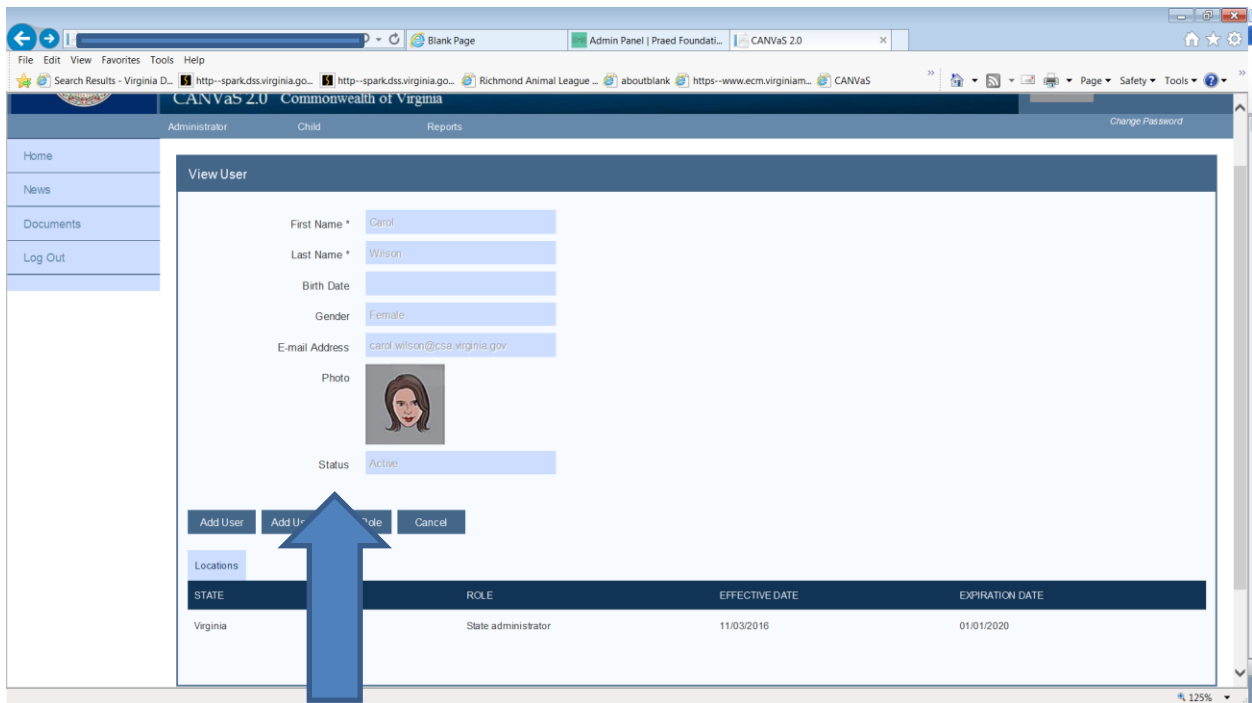
How to Add an Existing User to Your Locality

If a case manager has an account in CANVaS in another locality, but needs to be added in yours, do the following:

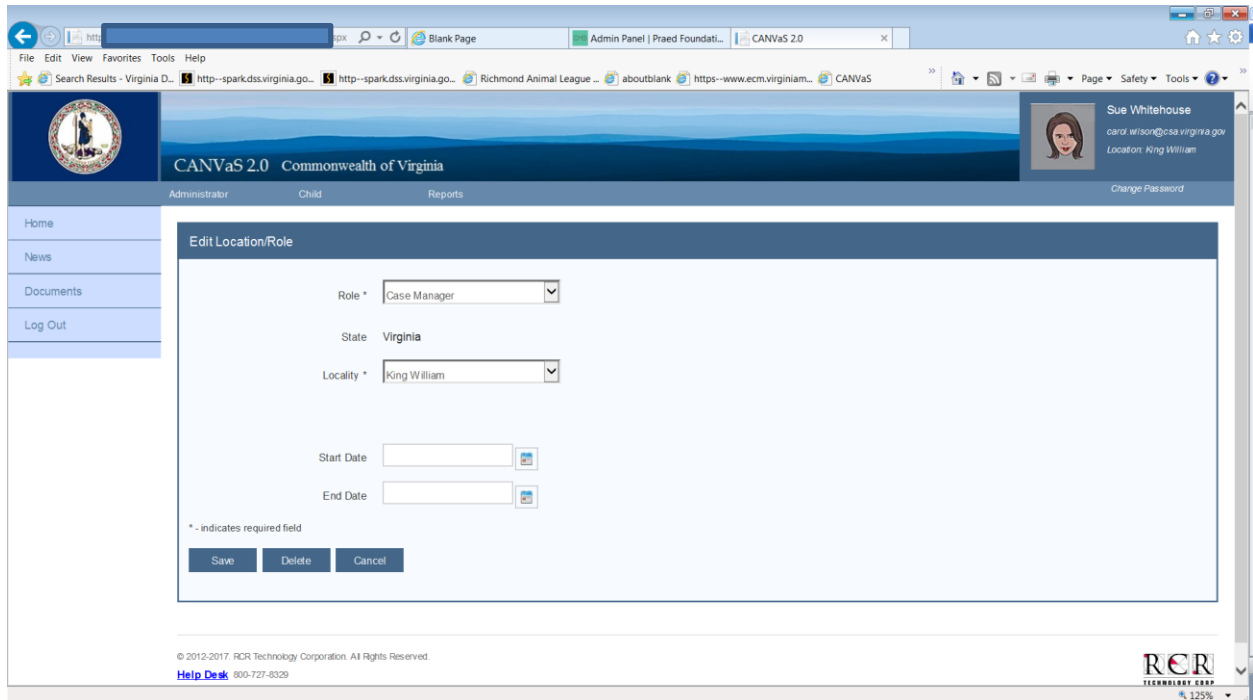Search for the user using "Global User Search."
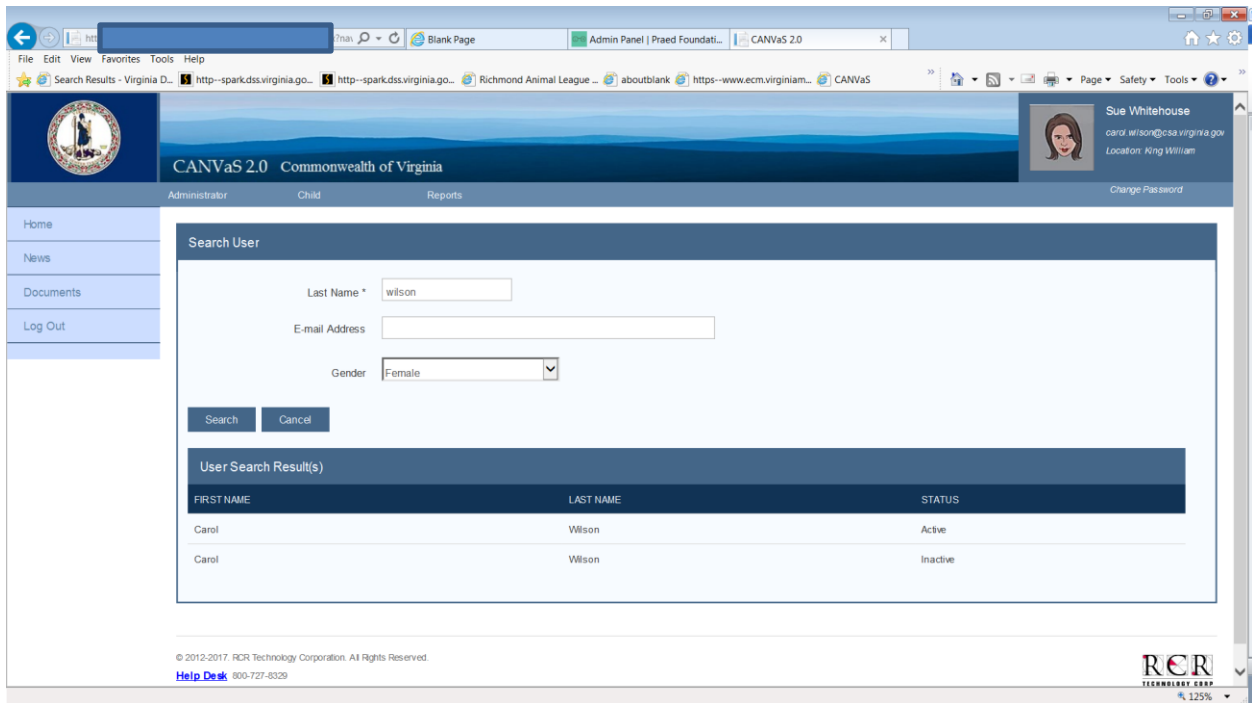
Select the user you want to add to your locality.

The View User page will appear.

Click on Add User Location/Role.

The following page will appear:

The system will default to "case manager" and the locality where you logged in. Enter a start date here. An end date is not necessary. Click on "Save."

The User ID page will appear. Under Locations" you will see "King William" has been added, along with the start date. The system defaults to an end date six years in the future.
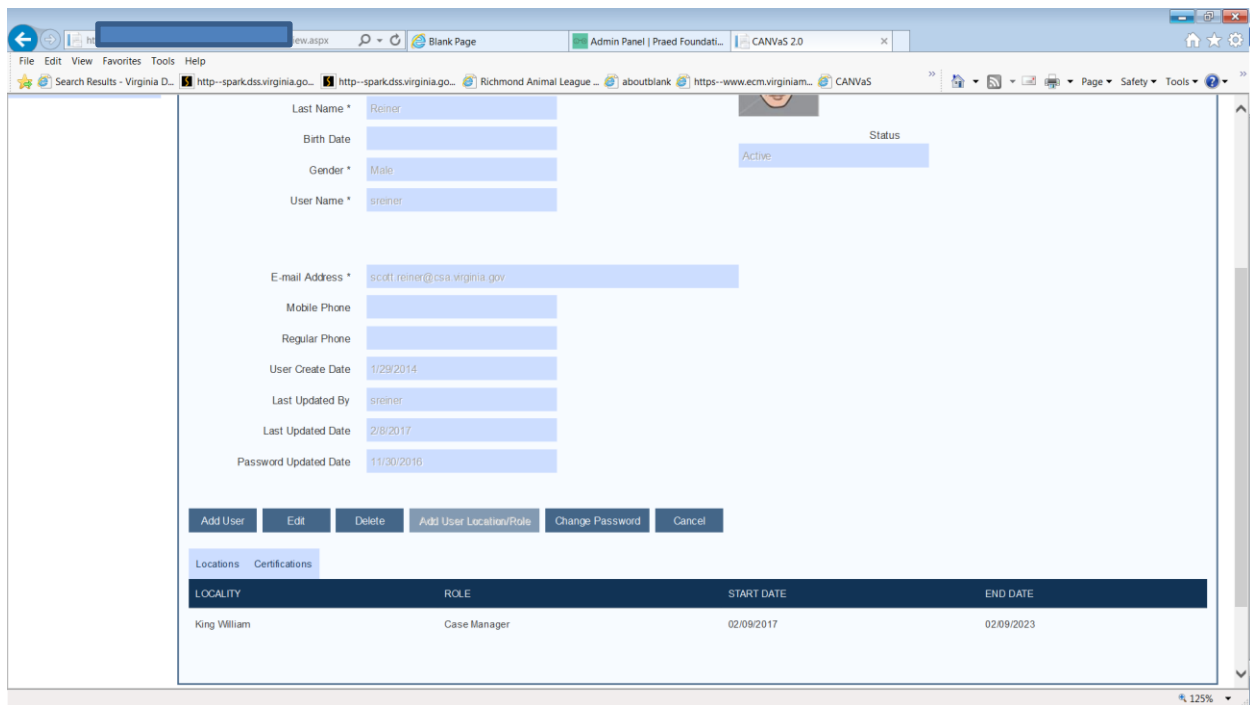
If the user is no longer working in the previous locality, the DSU/RA should be notified. He or she will enter the "end date" for the user in that locality.

How to Add a User Certification for a New User

There are two steps in adding a user certification. One step is adding the Praed ID number. On the "Edit User" page, enter the "External ID" number found on the Praed certification. This is important because this number is a unique number associated with each Praed user. When the user with an active CANVaS account recertifies, the Praed system will search for the CANVaS account with this external ID to update the certification.

Initially, for new users only, the CANVaS Help Desk will add the certification expiration date to the account. The plan is for local DSU/RAs to be able to add this directly to the system, but for now the Help Desk will enter the certification dates for new users.

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