

CSA IT Applications

8th Annual Commonwealth of Virginia CSA Conference

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CSA Main Website

www.csa.virginia.gov





Resources – Guidance – Funding and Financial Reporting



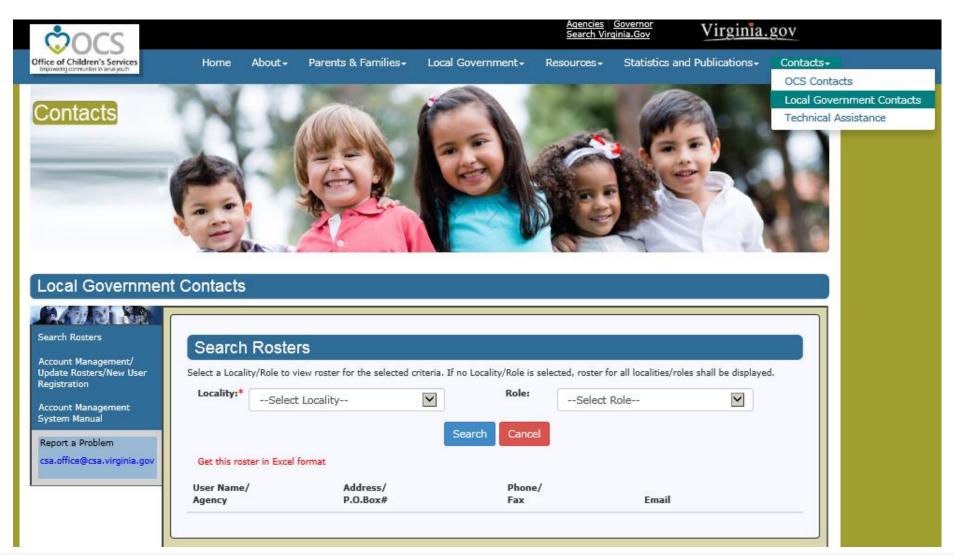


Resources – Guidance – Funding and Financial Reporting

- LEDRS File Layout Details and Crosswalks
- LEDRS File Upload User Manual
- Pool Fund Expenditure Categories and Definitions
- Pool Fund Expenditure Categories mapping with Thomas Brothers System
- Service Placement Categories
- Service Names Definitions



Contacts – Local Government Contacts – AMS





What are the features?

AMS allows users to:

- Create new user or system accounts with an associated password.
- 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



Keeping the AMS Up to Date

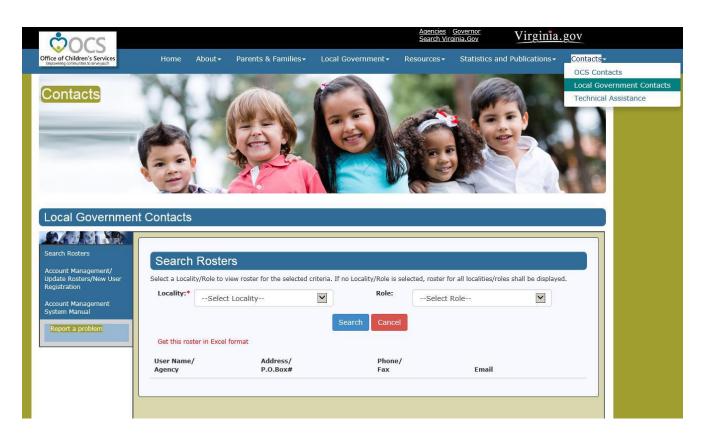
- It is the responsibility of the locality to keep these rosters current and accurate.
- Request to make additions/deletions/changes to the directories, can be done by any individual, but these changes go through an Approval flow in the Account Management System (AMS) where the data resides



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)





AMS – Update Rosters/New User Registration

When a User clicks on the Account Management/ Update Rosters/New User Registration link on the left "rail".

Click on the "Click here to proceed" button.

The screen displayed is as follows. The User has three options:

- 1. Login to AMS (using an established e-mail address and password)
- 2. Create New Account
- 3. Reset/Forgot Password

Creating a new User account

There are two ways to create a new User account:

- 1. By clicking on the Create New Account button
- 2. Or by Login to AMS button (if you have an existing registered account)



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.







Using the Create New Account Button

When User clicks on the Create New Account button. The following screen is displayed and the User needs to enter all the required data and 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. User has the Register User tab, clicking on it will display the Create New Account page as shown below. The User needs to enter all the required data and click on Register button.





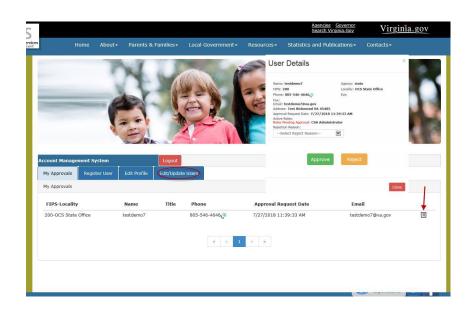
AMS – Local Approver Screen My Approvals tab

Local Approver's (CSA Coordinator and CPMT Chair) have the My Approvals tab that will display a list of Users in their approval "basket." To Approve or Reject a request the Local Approver will click on the review icon in the far right column. A popup screen to Approve or Reject the User is displayed.

When the User is approved the User will no longer appear in the Approval "basket." 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 his 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.

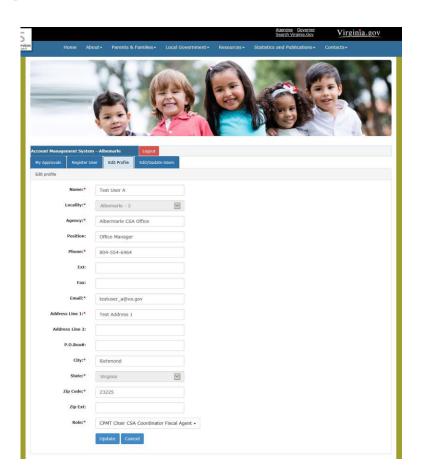




Edit Profile tab

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

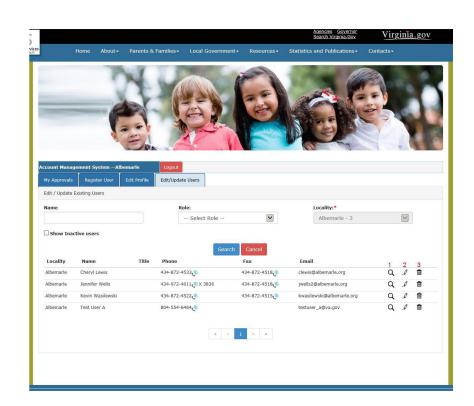
On this tab the User can edit or modify the user's own profile detail. After needed changes are entered, click on the Update button





Edit/Update Users tab

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





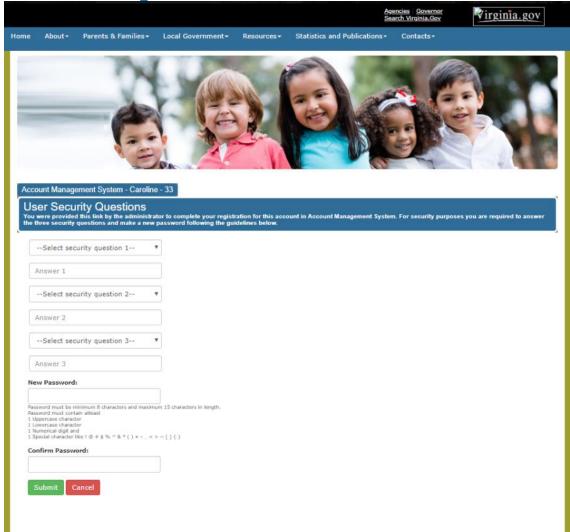
- 1. The View (Magnifying Glass icon) is used to view the details of a User.
- 2. The Edit (Pencil icon) is used to Edit the details of a User. It can be used to:
- i. Edit User Information
- ii. Add User roles
- iii. Delete User roles
- 3. The Delete (Trash Can) icon is used to Delete/Deactivate a User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





User Security Questions/Password for New Users

- To establish password
- To establish security questions



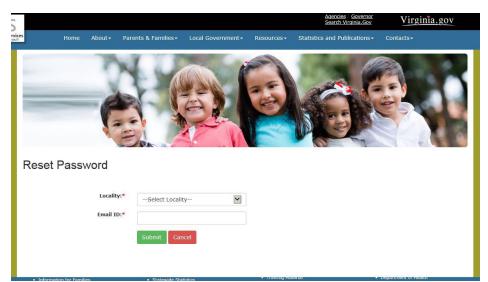


Reset/ Forgot Password

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

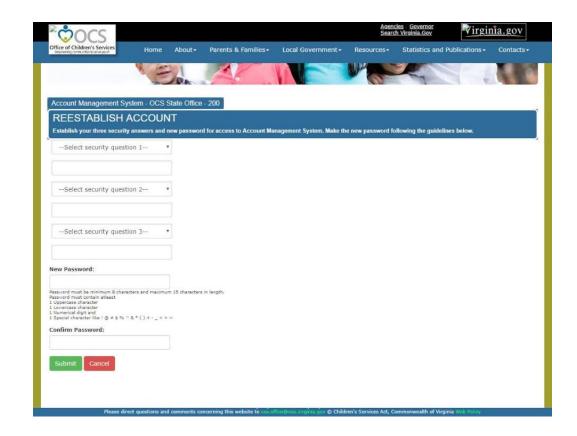
To your registered email address, an email with instructions is sent, on how to proceed.





Reestablish Account

- Redo security
 Question / Answer
- Set new password





Local Government Reporting

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

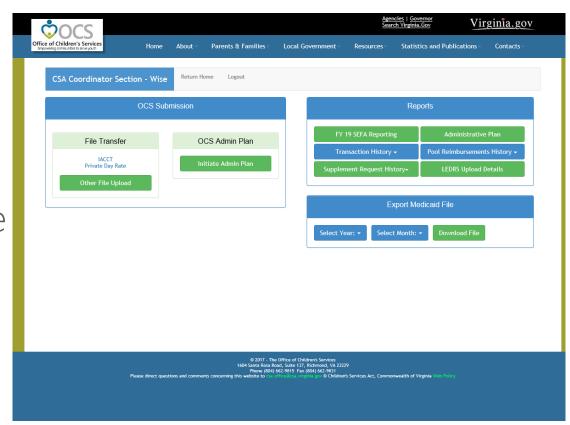






CSA Coordinator Section

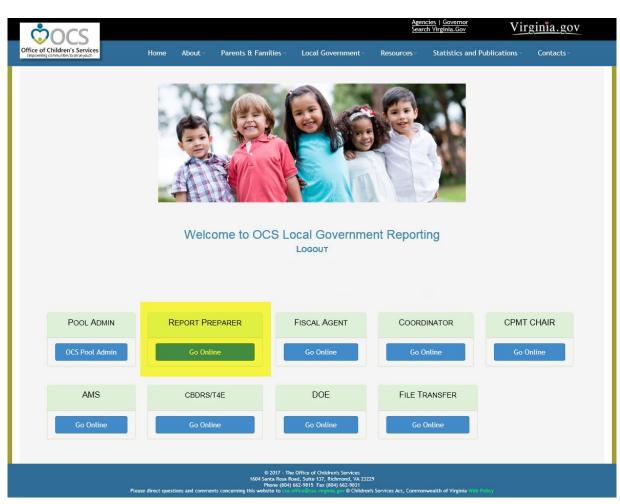
- IACCT File Upload
- OCS Admin Plan
- Reports
- Export Medicaid File





Local Government Reporting

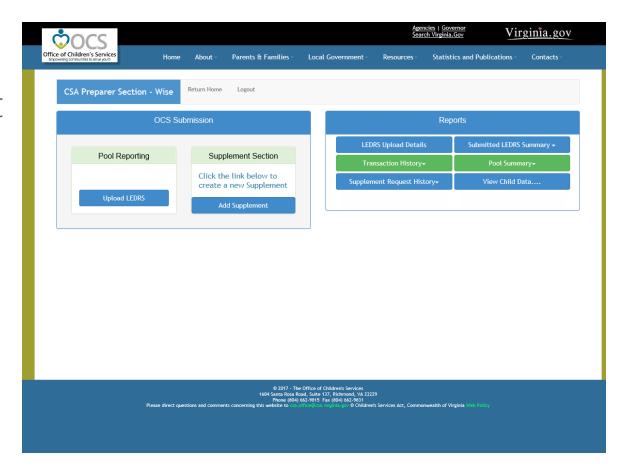
Report Preparer





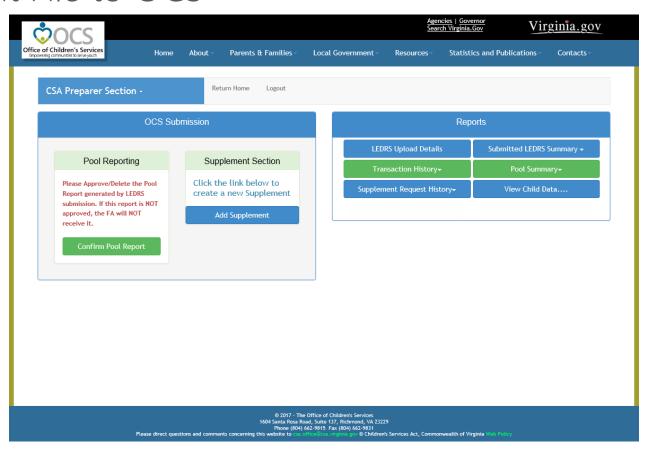
CSA Report Preparer Section

- Upload LEDRS
- Add Supplement
- Reports





Submit File to OCS





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 | CCA | |
| File Naming Convention | <u>CSA</u> CSA_Fips_Frequency_Year_Period_Report#.txt | File Name eg> CSA 1 M 2016 10 1 tvt |
| | OOA_i ips_i requerity_real_i enou_iteport#.txt | The Name eg> OOA_1_W_2010_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. |
| | | |
| | <u>Title IV-E</u> | |
| | 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



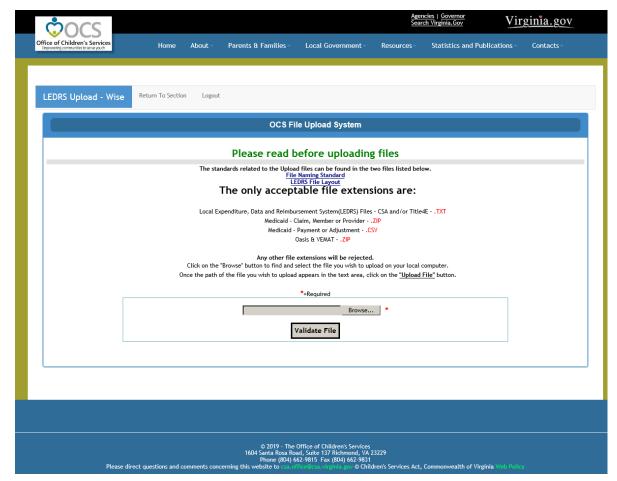
Crosswalk

Expenditure Category vs.

Mandate Type

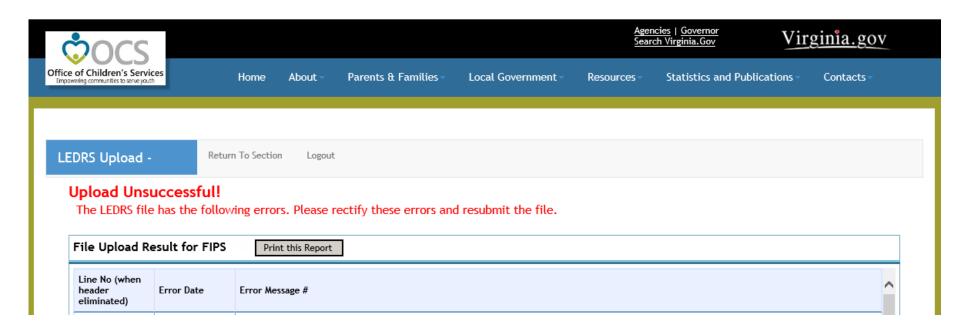


- Browse
- Validate File



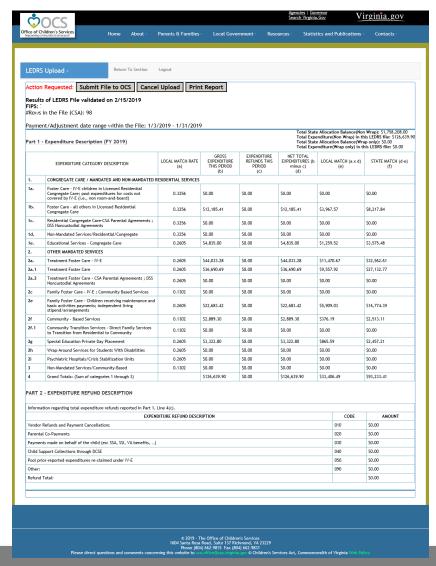


Upload Error



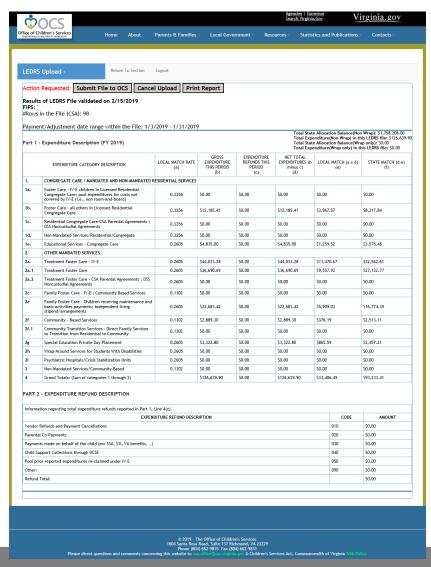


Upload Success



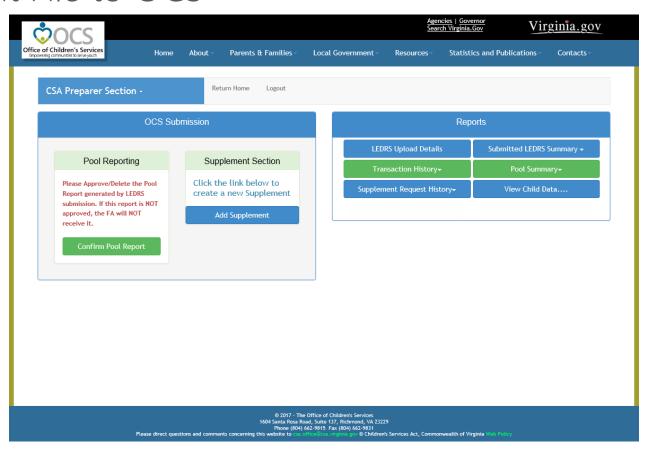


Upload Success





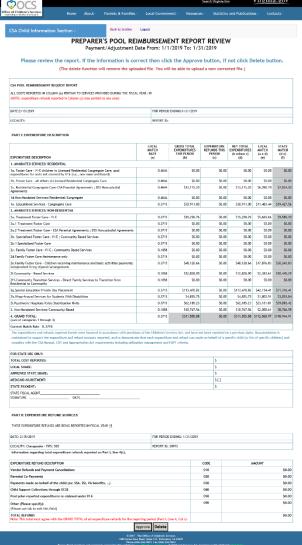
Submit File to OCS





CSA Report Preparer Section – Upload LEDRS

 Approve Pool Report





Local Government Reporting

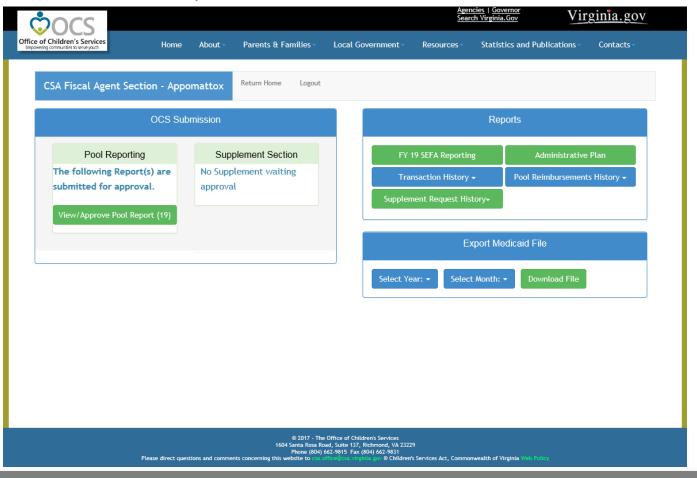
Fiscal Agent





CSA Fiscal Agent Section

Approve Pool Report





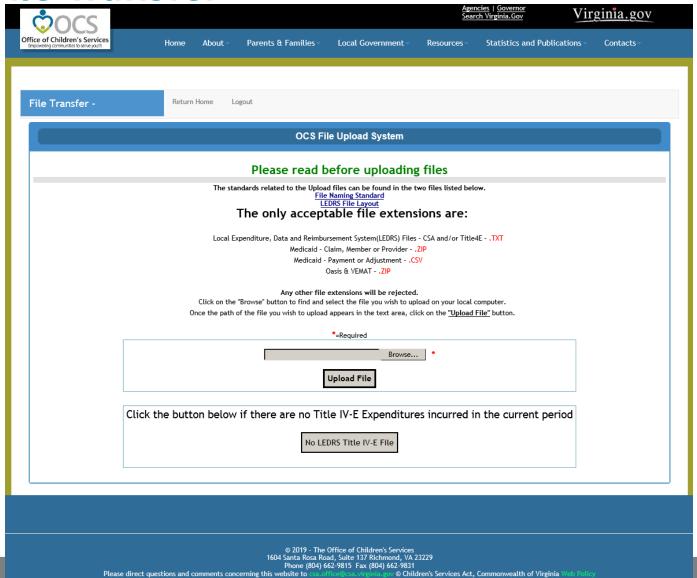
Local Government Reporting

• File Transfer



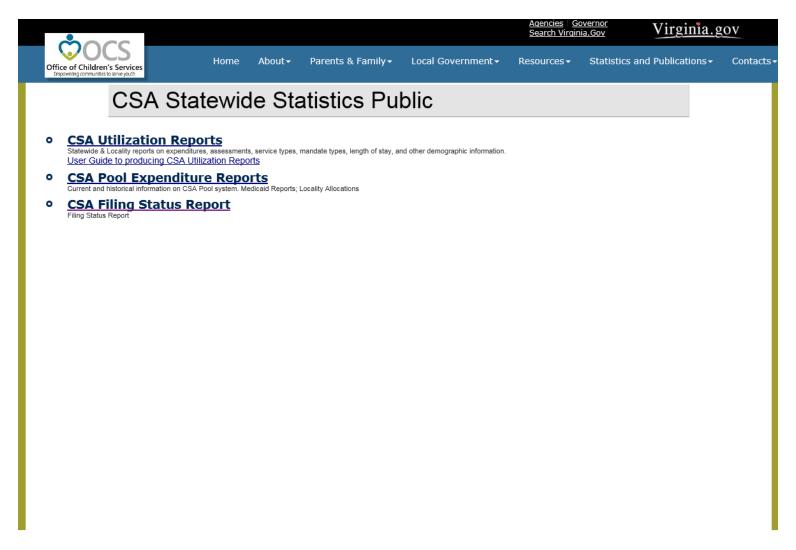


CSA File Transfer



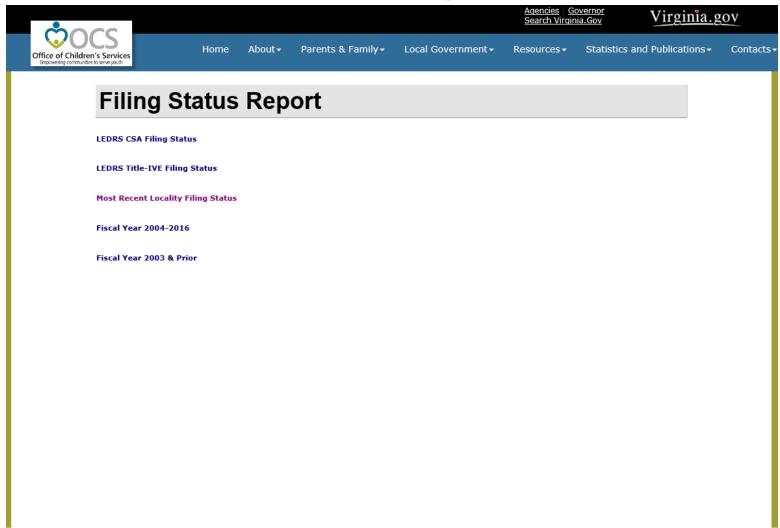


Statewide Statistics

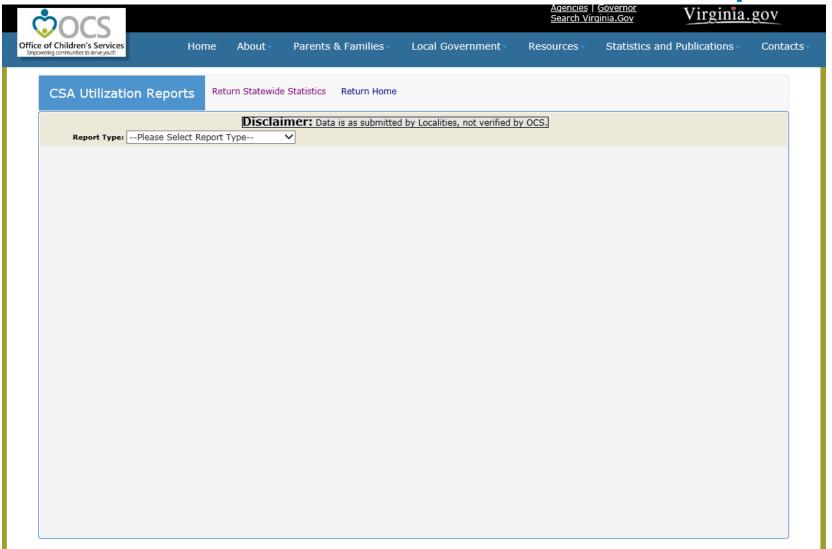




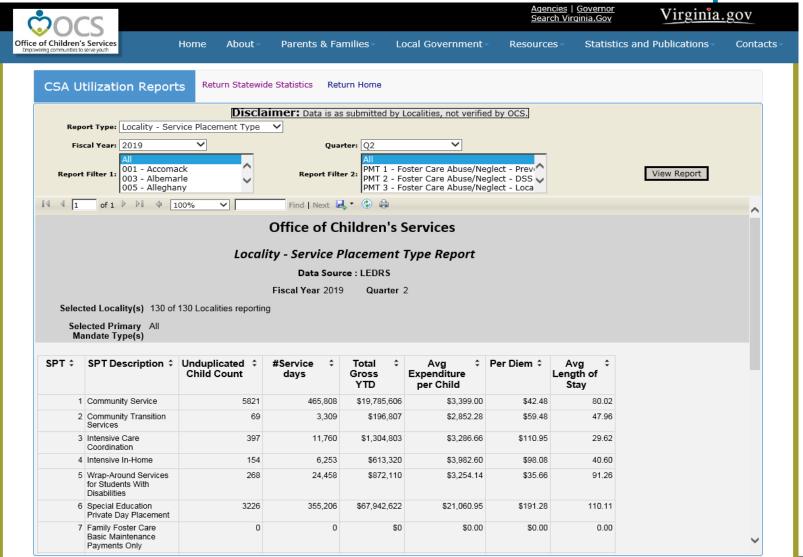
Statewide Statistics – Filing Status Report



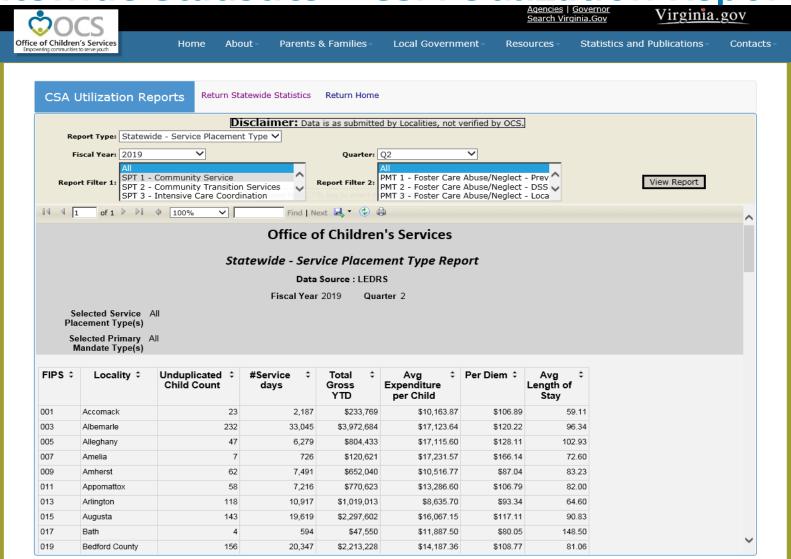




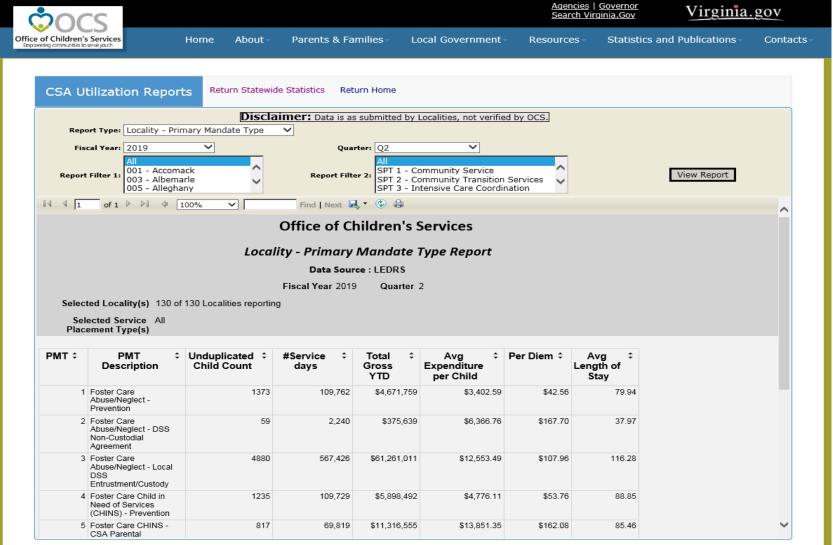




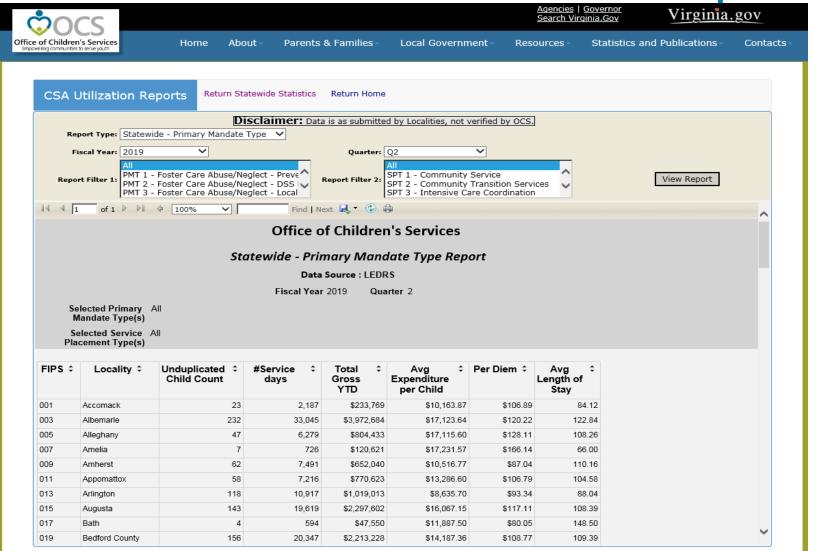




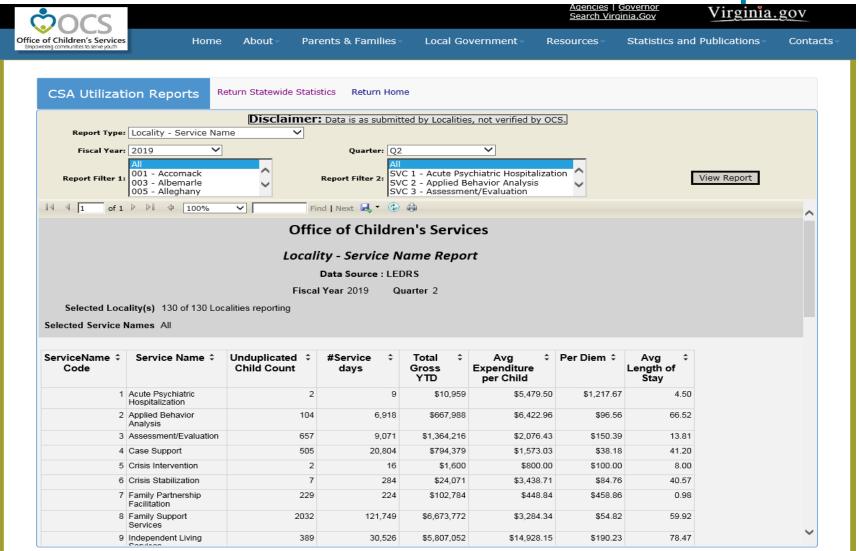




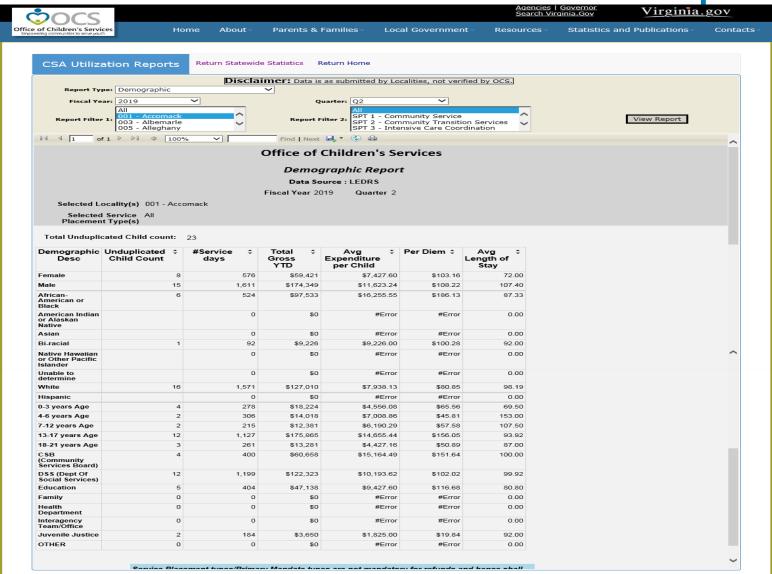




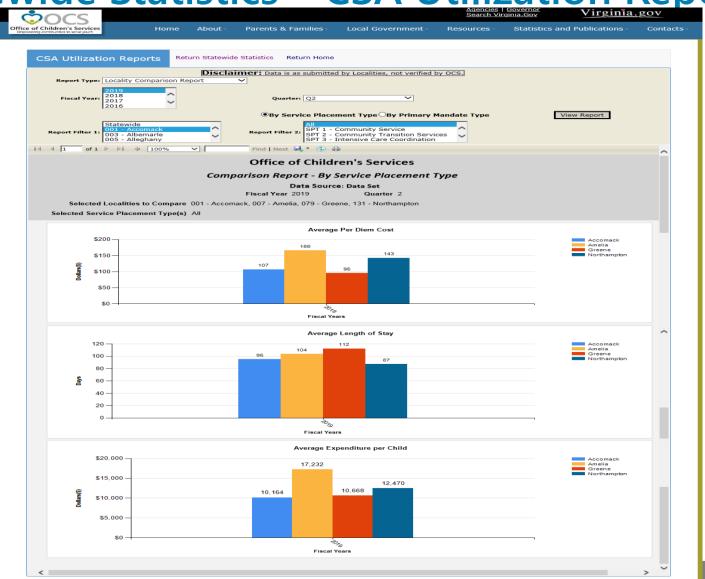














Data Security

- 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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