



CANVaS 2.0 Basics for the Local Administrator (Designated Super User/Report Administrator- DSU/RA)

A Guide to Using the CANVaS 2.0 Website

***Virginia Office of Children's Services
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CANVaS 2.0 Basics for the Local Administrator (Designated Super User/Report Administrator-DSU/RA)

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CANVaS 2.0 Basics for the Local Administrator (Designated Super User/Report Administrator –DSU/RA)

INTRODUCTION

This document is a basic outline of how to manage the primary routine responsibilities of CANVaS 2.0 Local Administrators (often referred to as DSU/RAs). For a full explanation of how to use the CANVaS 2.0 website, please refer to the *CANVaS 2.0 User Manual* which may be found in the CANVaS “Documents” folder on the CANVaS 2.0 website or in the CANS folder on the state Children’s Services Act (CSA) website at <http://www.csa.virginia.gov/Cans/Index>.

For technical assistance with CANVaS 2.0, contact the CANVaS Help Desk at 1-877-727-8329 or by e-mail at canvas@rcrtechnology.com . The Help Desk is “live” from 8:00 a.m.-5 p.m. Monday through Friday (excluding holidays).

The CANVaS 2.0 URL is <https://www.csa.canvas.virginia.gov>

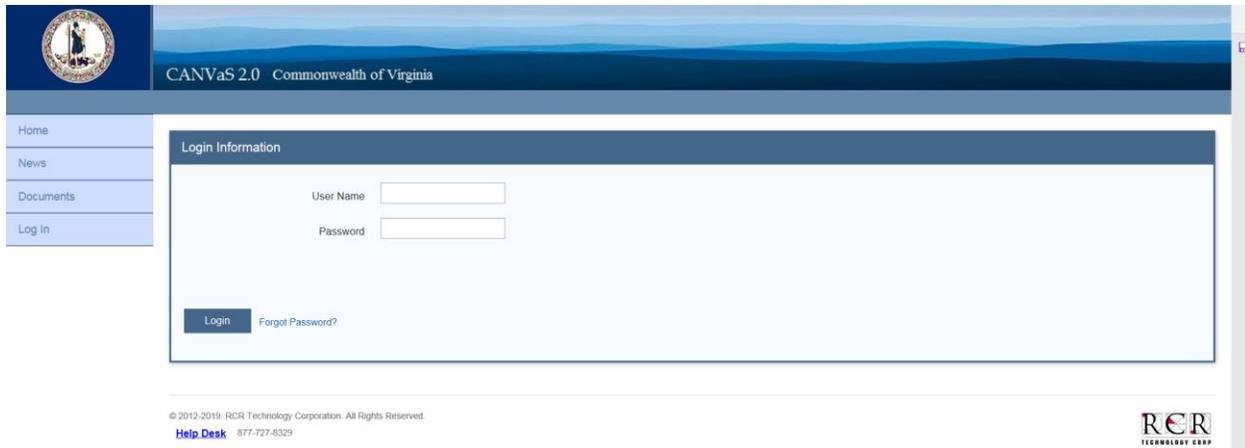
FIRST STEPS!

If your locality has requested that you serve as a CANVaS 2.0 Local Administrator (DSU/RA), and you wish to create a Local Administrator account, please contact Carol Wilson in the Office of Children’s Services at carol.wilson@csa.virginia.gov or (804) 662-9817.

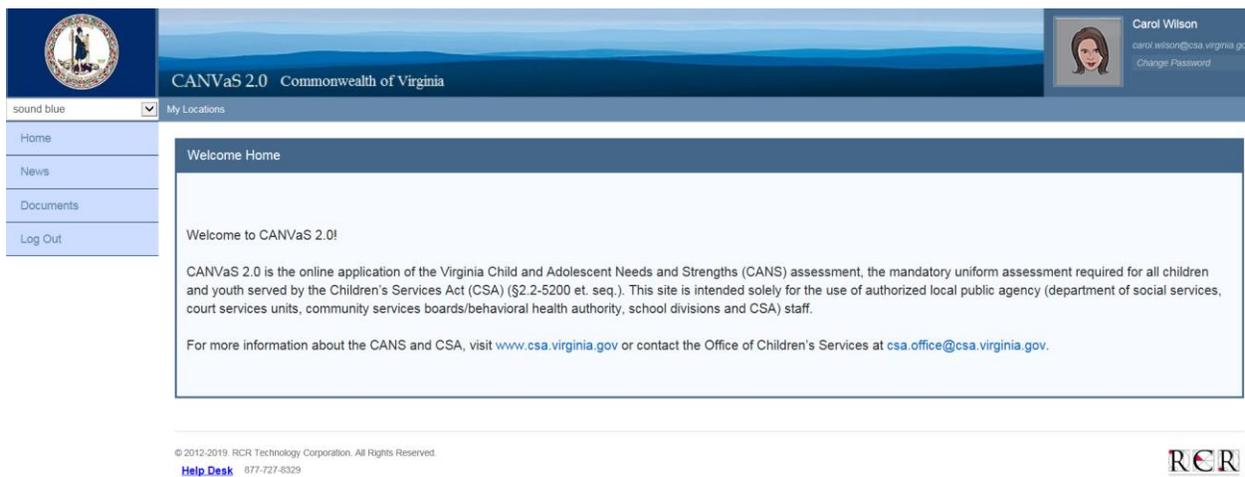
Once your Local Administrator account has been created, you will be directed to the CANVaS 2.0 log in page which looks like the screenshot on the following page.

Enter your CANVaS user name and password.

Click on “Log-in” on the menu on the left side of the page or click on “enter.” (Screenshot on following page.)



The next page (the home page) looks as follows:



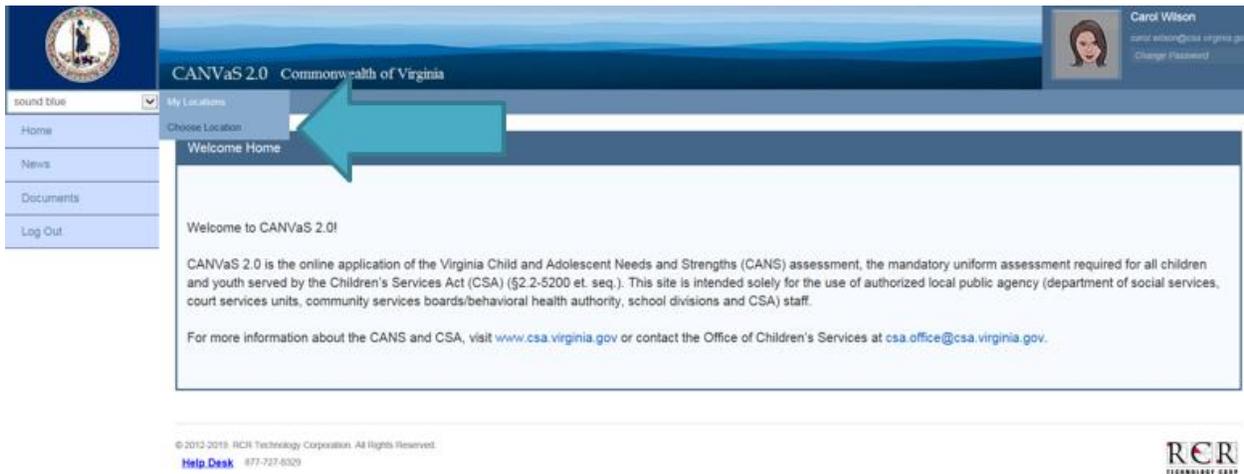
ACCESSING LOCALITIES

*If you are a Local Administrator in only one locality, skip to page 6.**

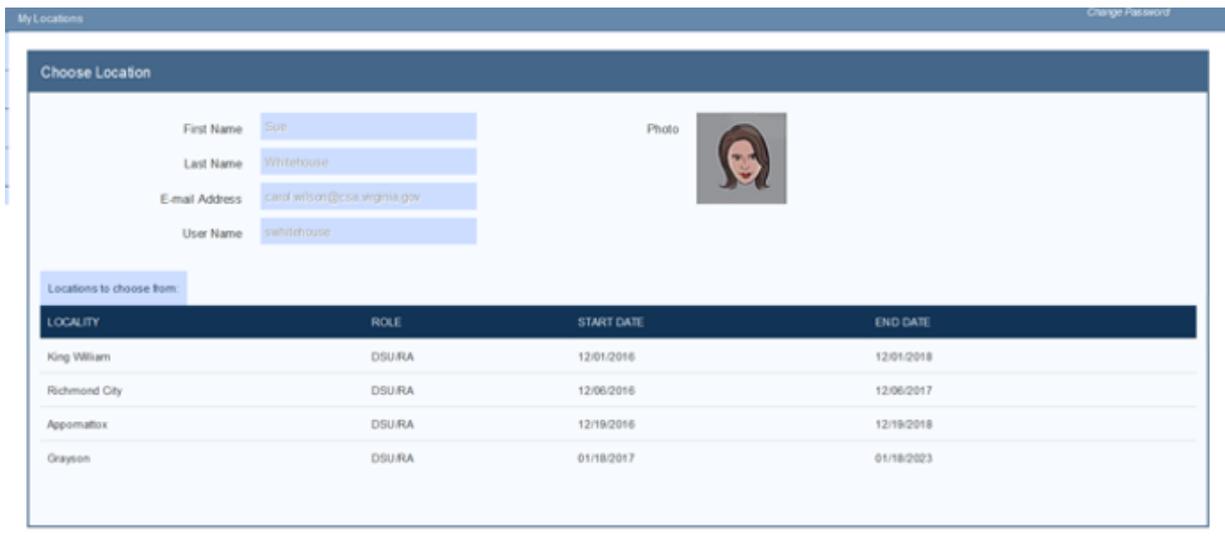
If you are a Local Administrator in multiple localities, continue on this page.

If you are a Local Administrator in multiple localities each locality will be listed on your account. 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.”
- Scroll down and click on the “bar” or line for the locality you wish to access.
- You may only access one location at a time.

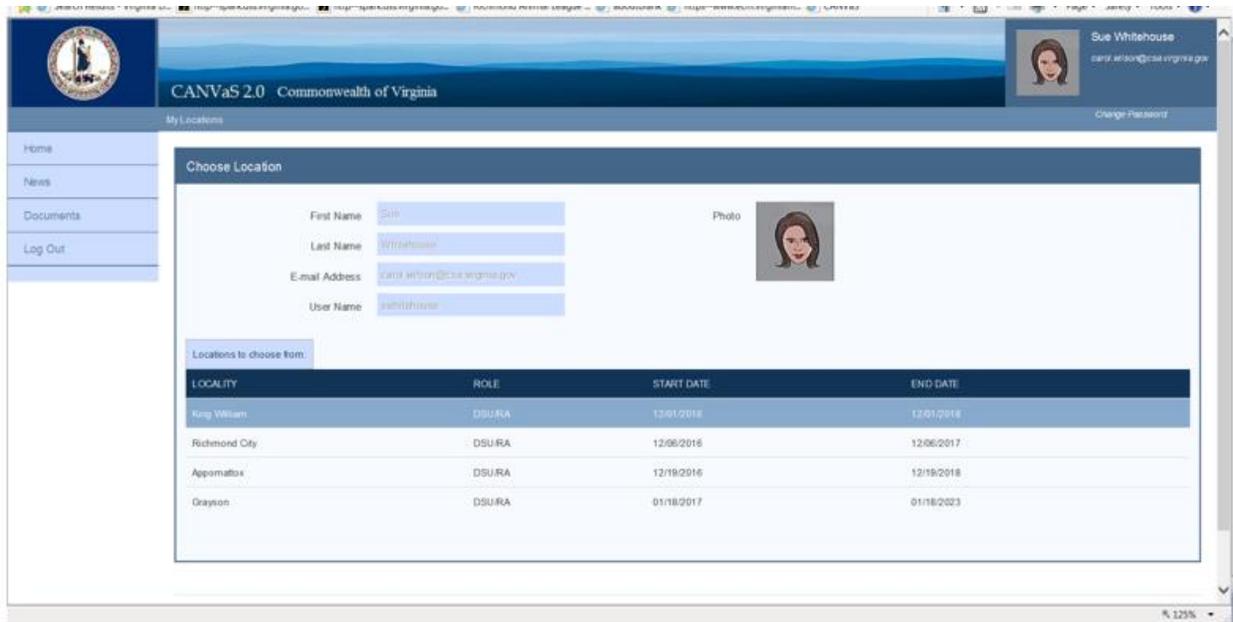


When you click on “Choose Location” the display will show all localities for which you have an account.



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

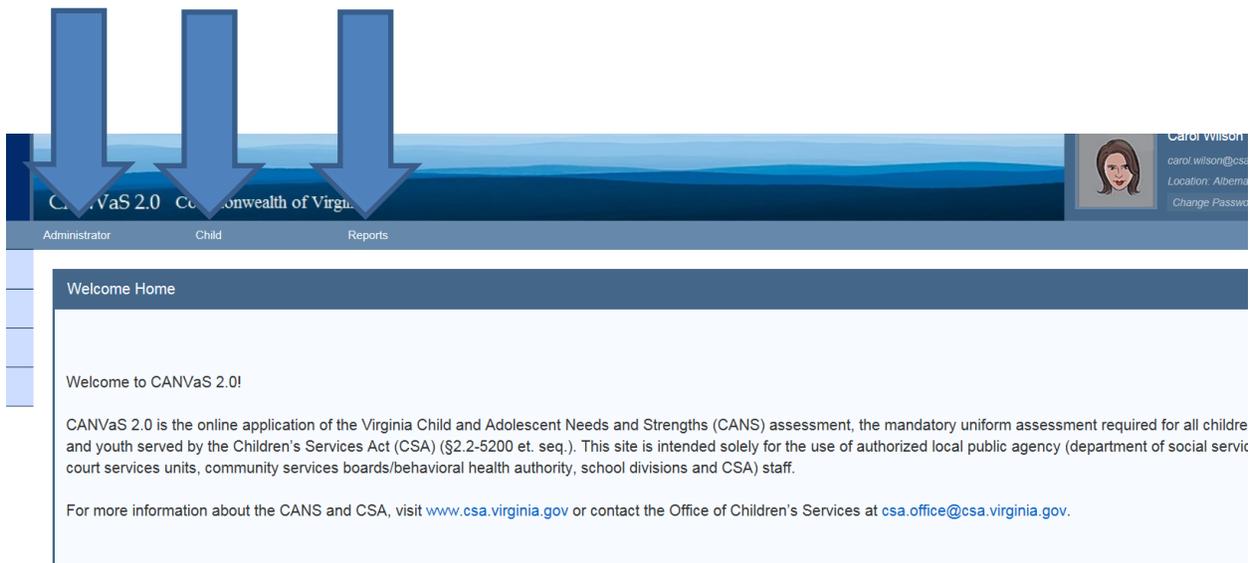
Mouse over the bar for the locality you wish to select and click on the bar. In the screenshot below, King William has been selected.



You will be returned to the home page. Please note the three tabs (Administrator, Child and Reports) along the top of the screen.

(*from page 4) If you are a DSU/RA in only one locality, you will also see these three tabs below after log in (“Administrator”, “Child” and “Reports”) and will not see the “Choose Location” tab.

SEARCHING FOR AND ACCOUNT MANAGEMENT FOR PREVIOUS USERS



There are two options to search for users on the “Administrator” tab (“Global User Search” and “User”). Use “Global Search” first unless you know the user already has an account in your locality (if so, see page 10). See arrow in screenshot on the following page.

Select "Global User Search" to look for a CANVaS user anywhere in Virginia.

The screenshot shows the CANVaS 2.0 Administrator interface. The top navigation bar includes 'Administrator', 'Child', and 'Reports'. The left-hand menu has 'Global User Search' highlighted with a yellow arrow. The main content area contains a welcome message and information about the application.

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Global User Search

The screenshot shows the 'Search User' form. The 'Last Name *' field contains 'wilson'. The 'E-mail Address' field is empty. The 'Gender' dropdown menu is set to '-- Select Gender --'. There are 'Search' and 'Cancel' buttons at the bottom.

Enter the user's last name only for the broadest search. User e-mail addresses change, and gender may not have been added to previous accounts. Click "Search".

CANVaS 2.0 Commonwealth of Virginia

VA Administrator Administrator Child Reports

- You have assessments open more than 60 days. Please close as open assessments will be deleted on the 75th day. [Click here for more details.](#)
- You have annual assessments due/overdue. [Click here for details.](#)

Search User

Last Name *

E-mail Address

Gender

FIRST NAME	LAST NAME	STATUS
Scott	Reiner	Inactive
Scott	Reiner	Active

The display will show all users statewide 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 **inactivated (see page 17)**.

If a user’s name does not appear on this list (again, use last name only to search) go to page 11 **“HOW TO ADD A NEW USER.”**

If the User has an Existing CANVaS Account

If the user has ever had a CANVaS account, his or name should appear under the Global Search. The user may have an active or inactive account or be moving from one agency to another or one locality to another. **NOTE:** User accounts should always be inactivated when an individual user leaves employment or changes jobs such as moving from one agency to another.

Click on the bar of the user’s name to access the user’s profile or account. If a user exists in the system with an active account, **but is new to your locality or agency**, the user will need to submit a “Request to Create or Reactivate a Case Manager Local Account” form to you before you may add your locality’s access and update the user’s information. If the user exists in the system but his or her account is inactive, the user must submit the same form (Request to Create or Reactivate a Case Manager Account) to you before you may reactivate the account.

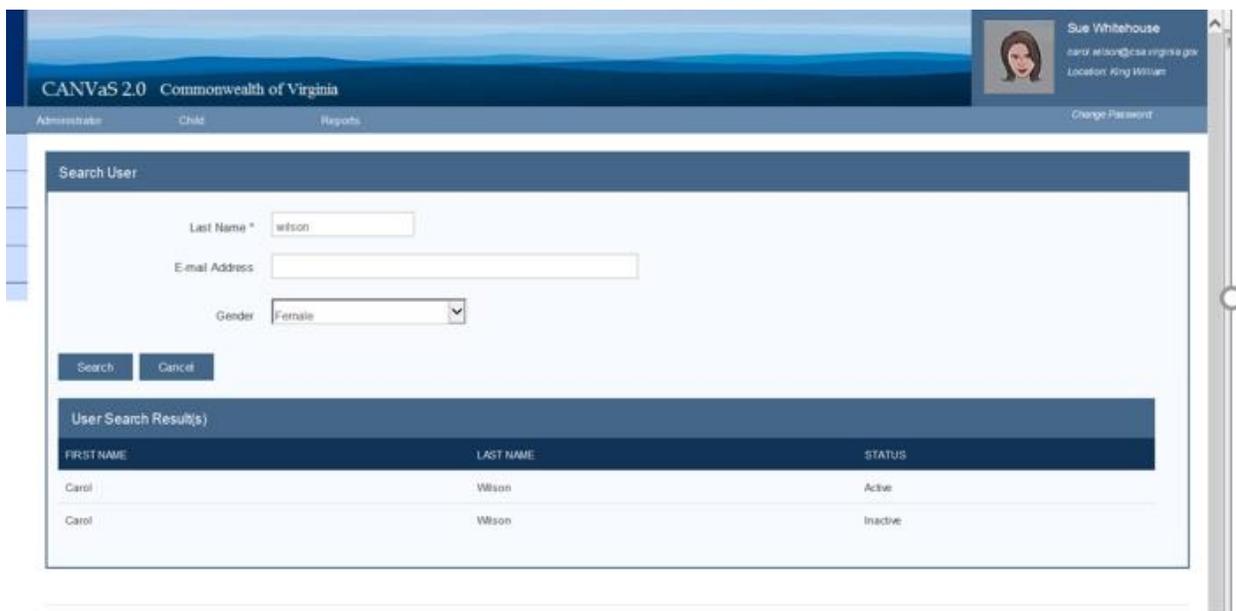
Access to CANVaS 2.0 is granted based on the user’s need to use the system to carry out his or her specific job responsibilities **in that position** as verified by the user’s supervisor’s signature. Consequently, a new form must be completed and signed when a user changes jobs.

The “Request to Create or Reactivate a Case Manager” account form may be found in the CANVaS 2.0 “Documents” folder or on the state CSA website in the CANS folder at <http://www.csa.virginia.gov/Cans/Index> (CANVaS 2.0 Fact Sheets and Account Management).

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” as described above. **Remember to enter only the user’s last name for the broadest search.** User e-mail addresses change, and gender may not have been added to previous accounts.



The screenshot shows the CANVaS 2.0 interface for the Commonwealth of Virginia. The user is Sue Whitehouse, located in King William. The search form is titled "Search User" and contains the following fields:

- Last Name *: wilson
- Email Address: (empty)
- Gender: Female

Buttons for "Search" and "Cancel" are visible below the form. The search results are displayed in a table:

FIRST NAME	LAST NAME	STATUS
Carol	Wilson	Active
Carol	Wilson	Inactive

Select the user you want to add to your locality.

The “View User” page will appear. This page provides the user’s current profile.

Click on “Add Location/Role.”

The following page will appear:

The screenshot shows the 'Edit Location/Role' form in the CANVaS 2.0 system. The form is titled 'Edit Location/Role' and contains the following fields:

- Role ***: A dropdown menu with 'Case Manager' selected.
- State**: A text field with 'Virginia' entered.
- Locality ***: A dropdown menu with 'King William' selected.
- Start Date**: An empty text field with a calendar icon to its right.
- End Date**: An empty text field with a calendar icon to its right.

Below the fields, there is a legend: '* - indicates required field'. At the bottom of the form are three buttons: 'Save', 'Delete', and 'Cancel'. The page header includes 'CANVaS 2.0 Commonwealth of Virginia' and a user profile for Sue Whitehouse. The footer contains copyright information: '© 2013-2017 RCR Technology Corporation. All rights Reserved.' and a 'Help Desk' link with the number '800-727-6329'. The RCR logo is also present in the bottom right corner.

The system will default to “Case Manager” and the locality where you logged in. Enter a start date here. Enter an end date two years from the current date. Click on “Save.”

The user’s account page will appear. Under “Locations” you will see the name of your locality has been added, along with the start date. The system defaults to an end date six years in the future, so please click on this box to change to a date two years from the current date. For example, if you are adding this user on June 6, 2019 put an end date of June 6, 2021. The location end date is not the same as the user’s certification expiration date.

If the user is no longer working in the previous locality, that DSU/RA should be notified. He or she will enter the “end date” for the user in that locality.

Managing an Existing User in Your Locality (currently inactive or changing jobs)

The second way to search for a user is locality-specific. If you know the user has been active in CANVaS in your locality, search by clicking on the Administrator tab and selecting “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.)



If a user currently exists in your locality (i.e., name is showing on this list) but the account is inactive or the user has changed jobs (e.g., from the local Department of Social Services to the local Court Services Unit) the user must complete and submit, with supervisor’s signature, the “Request to Create or Reactivate a Case Manager” account before you may reactivate the account or make any changes. This form may be found in the CANVaS 2.0 “Documents” folder or on the state CSA website in the CANS folder at <http://www.csa.virginia.gov/Cans/Index> (CANVaS 2.0 Fact Sheets and Account Management).

Once you receive the form, access the user’s account page by clicking on his or her name in the locality list.

Click “Add Location/Role”. The Edit Location Role screen will appear (same as **page 10**). The system will default to “Case Manager” and the location that you are logged into.

You may then edit the user’s information such as updating the e-mail address and checking the “active” box.

HOW TO ADD A NEW USER

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

<https://www.schoox.com/academy/CANSAcademy/home/>. For instructions on how to create an account on the Praed Foundation training and certification site, please see <http://www.csa.virginia.gov/Cans/Index> (*Training and Certification*)

Users will need to complete the 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. Again, this form may be found in the CANVaS 2.0 “Documents” folder or on the state CSA website in the CANS folder at <http://www.csa.virginia.gov/Cans/Index> (CANVaS 2.0 Fact Sheets and Account Management).

Creating a New User Account

How do you create a new CANVaS user account? It’s easy!!!

If you have determined the user DOES NOT exist in the CANVaS system (through the search features described beginning on page 6), 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 page.



The “Add User” screen will display.

Add User

Complete the form. Make sure to enter all required fields.

PRAED ID

Note: Required to perform an assessment.

First Name *

Last Name *

Birth Date 

Gender * -- Select Gender --

User Name *

E-mail Address *

Mobile Phone

Regular Phone

Photo

* - indicates required field

Enter all of the required (*) information for this user. **Be sure to enter the user's correct e-mail address** (not your own). If the user name selected is already in use, a message will display "User Name exists; please create/enter another User Name." Please be sure to add the user's phone number as indicated on the form. The CANVaS Help Desk staff may try to respond by e-mail to a user's question, but the e-mails go in the user's spam folder. If the phone number is on the user's account the Help Desk can call the user.

DO NOT CLICK THE ACTIVE BOX. The account will activate when the user completes the process.

Do not enter the Praed ID on this screen at this time. You will enter it after you add the location.

D

Add User

Complete the form. Make sure to enter all required fields.

PRAED ID

Note: Required to perform an assessment.

Photo

First Name *

Last Name *

Beth Date

Gender *

User Name *

E-mail Address *

Mobile Phone

Regular Phone

* - indicates required field

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. Enter an end date of two years from the current date. (This is not the certification expiration date.)

- You have assessments open more than 60 days. Please close as open assessments will be deleted on the 75th day. [Click here for more details.](#)
- You have annual assessments due/overdue. [Click here for details.](#)

Add Location/Role for Carol Wilson

You must enter a location in order to send user account activation email!

Role * 

State Virginia

Locality * 

Start Date 

End Date 

* - indicates required field

Add

Cancel

Click "Add."

You will be returned to the user's information page. 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 and click "Save." 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. See screenshot on next page.

Gender *

User Name *

Secret Question *

Secret Answer *

E-mail Address *

Mobile Phone

Regular Phone

User Create Date

Last Updated By

Last Updated Date

Password Updated Date

* - indicates required field



The user must click on the link. He or she will see the following page.

Login information

User Name

Temporary Password

New Password

Confirm Password

Please Create a New Secret Question and Answer

Secret Question

Secret Answer

CANVaS 2.0
Individual Confidentiality and User Agreement

This form shall be read and signed electronically by an employee of any local public agency (Department of Social Services, Court Services Unit, Community Services Board/Behavioral Health Authority, school district or a local Children's Services Act employee) who wishes to establish an account in CANVaS 2.0 for his/her job functions. This agreement states the requirement to maintain confidentiality and documents the employee's agreement to abide by the system rules. For additional information, please refer to the "Procedures for Access to CANVaS 2.0" document which may be found at http://www.csa.virginia.gov/html/Policies_and_Procedures_for_Access_and_Use_of_CANVaS_Version_

By checking this box, the User requesting access acknowledges and agrees to the above conditions under which access to CANVaS is granted. (Failure to check this box will terminate the request to create an account.)

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 (VERY IMPORTANT)** and click the box acknowledging that the user agrees to these conditions. These terms advise the user of his or her responsibilities in regard to access and use of the system. (Access to CANVaS 2.0 may be revoked at any time but particularly if there is an indication a user is not following these conditions.) If the user agrees,

he or she will then click “Activate Account” and be directed to the log in page. If the user does not agree to the terms and conditions of the User Agreement, access to CANVaS 2.0 is prohibited.

If the case manager works in multiple localities and 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 a CANS Certification for a New User

To add 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.

If a user has certified prior to creation of the CANVaS account (the preferred order) when you edit the user’s account to add the “Praed ID” the user’s certification should populate onto the account.

INACTIVATING USER ACCOUNTS

When a user leaves employment (changes jobs, leaves the locality or agency) he or she is expected to notify the Local Administrator so the CANVaS account may be inactivated (this is one of the terms of the User Agreement). Local Administrators are advised to periodically check the “Active User” report to ensure accounts are appropriately inactivated.

This document provides instructions for CANVaS DSU/RAs on the most often required functions. For a full explanation of how to use the CANVaS 2.0 website, please refer to the CANVaS 2.0 User Manual or the CANVaS 2.0 Reports Manual. For assistance contact the CANVaS Help Desk at 1-877-727-8329 or by e-mail at canvas@rcrtechnology.com

Request to Create or Reactivate a New Case Manager Account

CANVaS 2.0

CANVaS 2.0 is the online software for the Virginia Child and Adolescent Needs and Strengths (CANS) assessment. CANS is required for all children and youth receiving services funded through the Children’s Services Act (CSA) and all children in foster care. Users are required to read and acknowledge acceptance of the requirements of the online user agreement.

If you are a case manager for the local department of social services, court services unit, community services board/behavioral health authority, schools or CSA who completes CANS for children on your caseload, please provide your Local Administrator with the following information to create your CANVaS access. Only public agency case managers, not private providers, may establish CANVaS accounts.

Your Local Administrator’s contact information may be found at <http://www.csa.virginia.gov/rosters>. Complete and submit this form to your Local Administrator to establish an account. Local Administrators are often referred to as Designated Super Users/Report Administrators (DSU/RAs).

REQUIRED INFORMATION

Name _____

Job Title _____

Agency _____

E-mail Address _____

Phone Number _____

User’s Signature _____ Date: _____

Requested User Name _____

Location(s) for which access is needed _____

Signature of Agency Supervisor* _____ Date: _____

The signature of the supervisor is required to confirm that the case manager requesting access to CANVaS 2.0 requires such access to carry out his or her job responsibilities.

Printed Name of Agency Supervisor _____

Send this information, along with a copy of your current CANS certification to your Local Administrator.

Your DSU/RA (Local Administrator) will create an account for you which will generate an e-mail being sent to you with a temporary password. Upon your first log- in to the system, you will be asked to create a secret question and answer as well as a new password. Passwords must be updated every ninety days.

If you do not receive the e-mail, contact your Local Administrator. For other access issues, you may contact the CANVaS Help Desk at 1-877-727-8329 or by e-mail at canvas@rcrtechnology.com (Do not e-mail child specific information.) Or you may contact the Office of Children’s Services at (804) 662-9815.