

## Getting Started...with CANVaS 2.0! (Case Managers)

### *Basic Log-in Information and Completing an Assessment*

This document is a basic outline for existing CANVaS users to log in and complete assessments. 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](mailto:canvas@rcrtechnology.com)

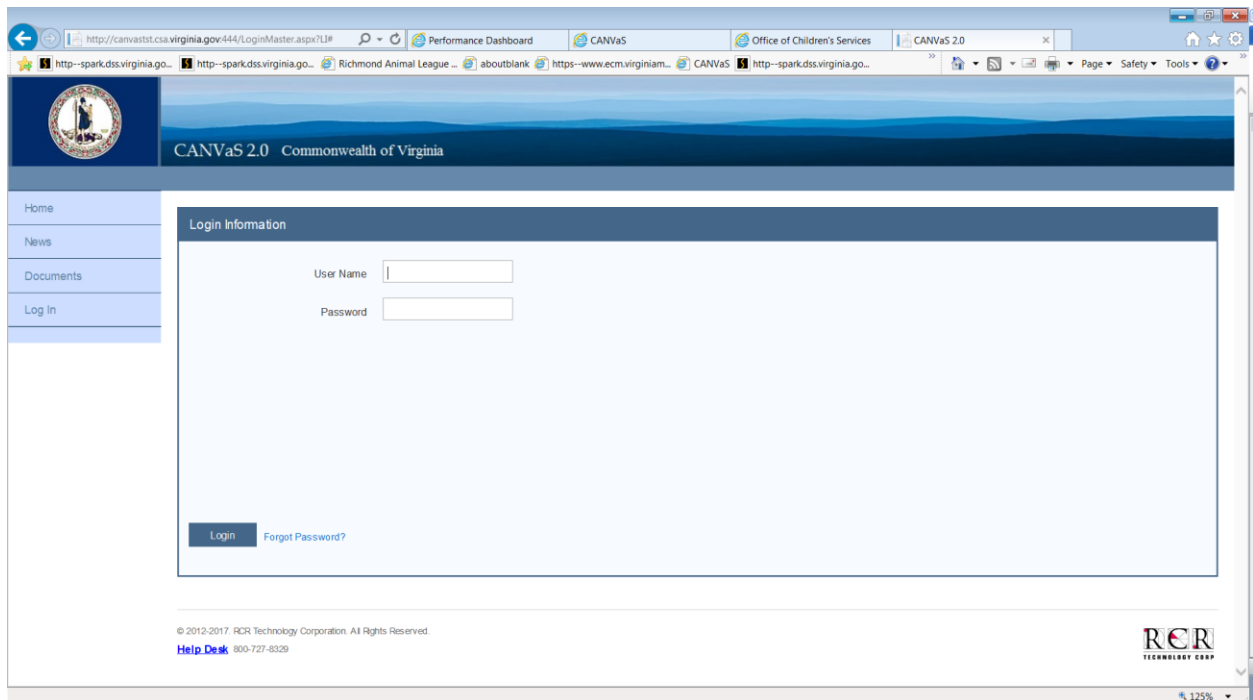
#### *If you are an existing CANVaS case manager user in one locality*

Your account and the assessments you have entered will transition to CANVaS 2.0.

Your existing CANS certification will transfer if you are currently certified.

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

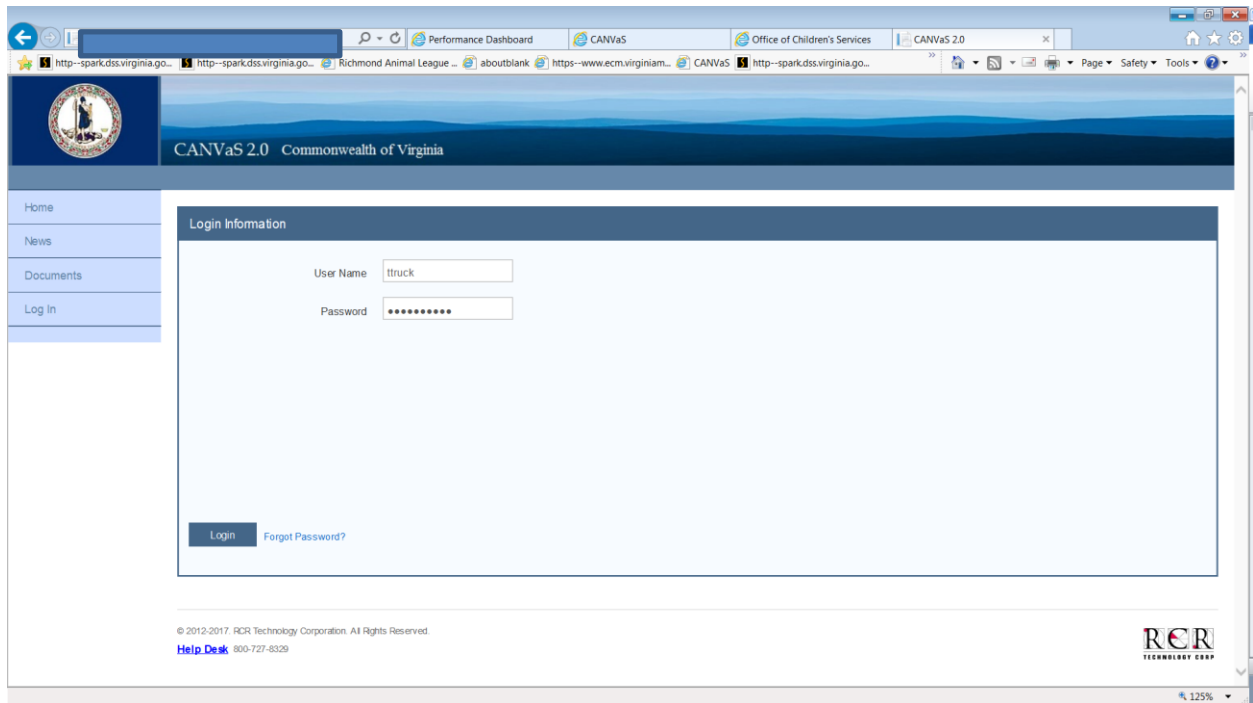
You will first access the log-in page.



The screenshot shows a web browser window displaying the CANVaS 2.0 login page. The browser's address bar shows the URL: <http://canvastst.csa.virginia.gov:444/LoginMaster.aspx?LI#>. The page header includes the Virginia state seal and the text "CANVaS 2.0 Commonwealth of Virginia". On the left side, there is a vertical navigation menu with the following items: Home, News, Documents, and Log in (which is highlighted). The main content area is titled "Login Information" and contains two input fields: "User Name" and "Password". Below these fields are two buttons: "Login" and "Forgot Password?". At the bottom of the page, there is a footer with the text "© 2012-2017, RCR Technology Corporation. All Rights Reserved." and a "Help Desk" link with the phone number "800-727-8329". The RCR Technology Corp logo is also visible in the bottom right corner.

Click on “Log-in” on the menu on the left side of the page.

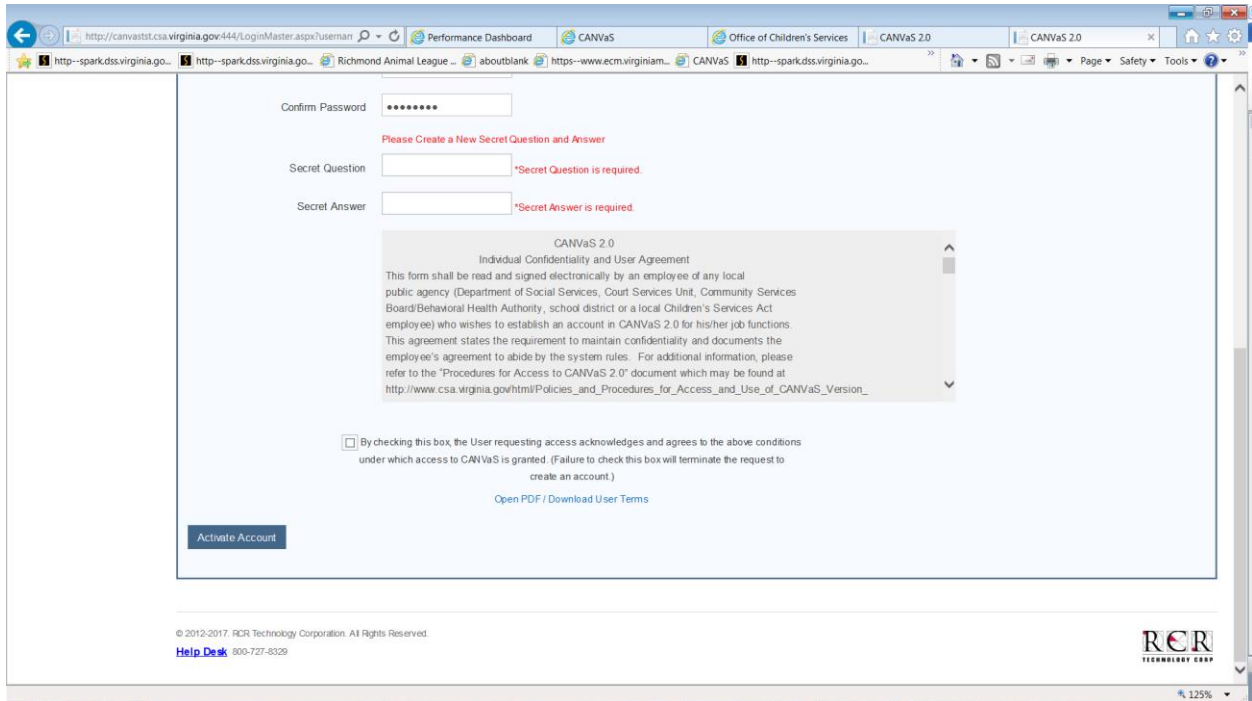
Enter your existing user name and password and click on “Log-in” at the bottom of the page or hit “Enter.”



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

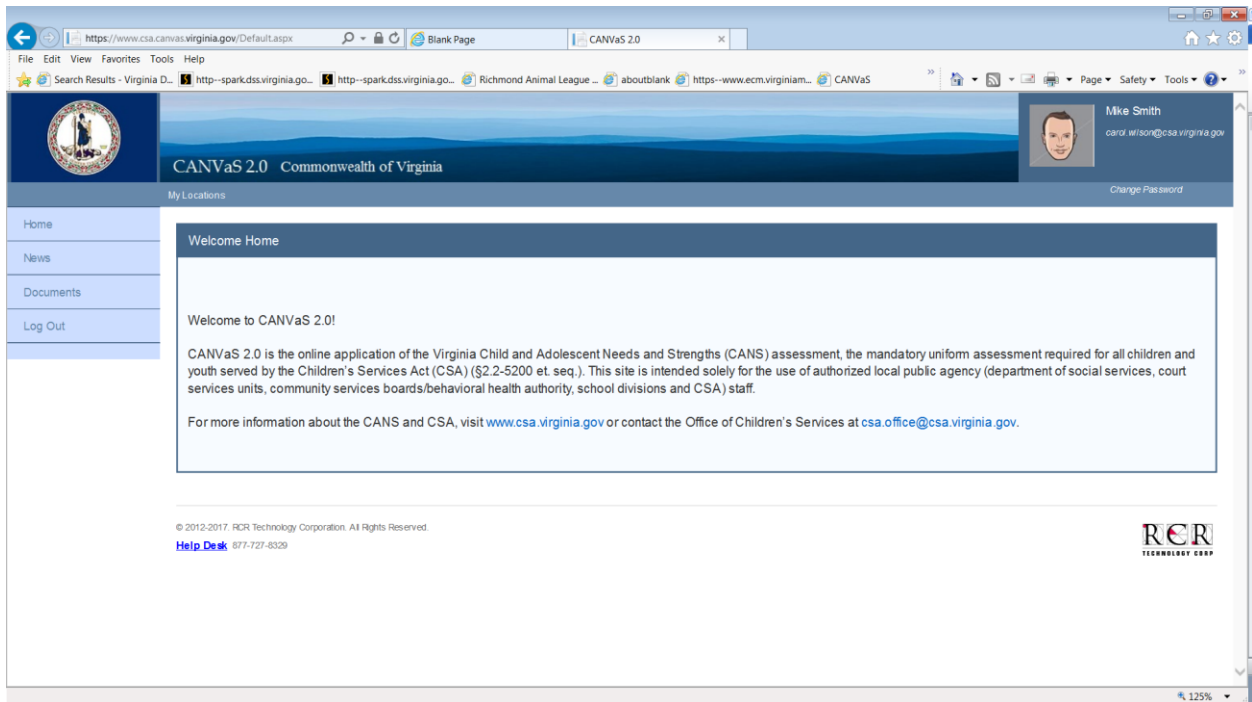
You will then also be asked to agree to the CANVaS 2.0 User Agreement. You must read the agreement and check the box. You may also print the user agreement. Please be sure you understand your responsibilities regarding access and use of CANVaS 2.0. Access to CANVaS 2.0 may be revoked at any time by the 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 may now access your account to complete all the necessary functions (e.g., search for children, add children, create assessments, print assessments and other reports).

Once logged in you will see this page.



You may now access your account to complete all the necessary functions (e.g., search and/or add users and children or create assessments, print assessments and other reports).

**If you are an existing user with multiple accounts (you work in more than one locality)**

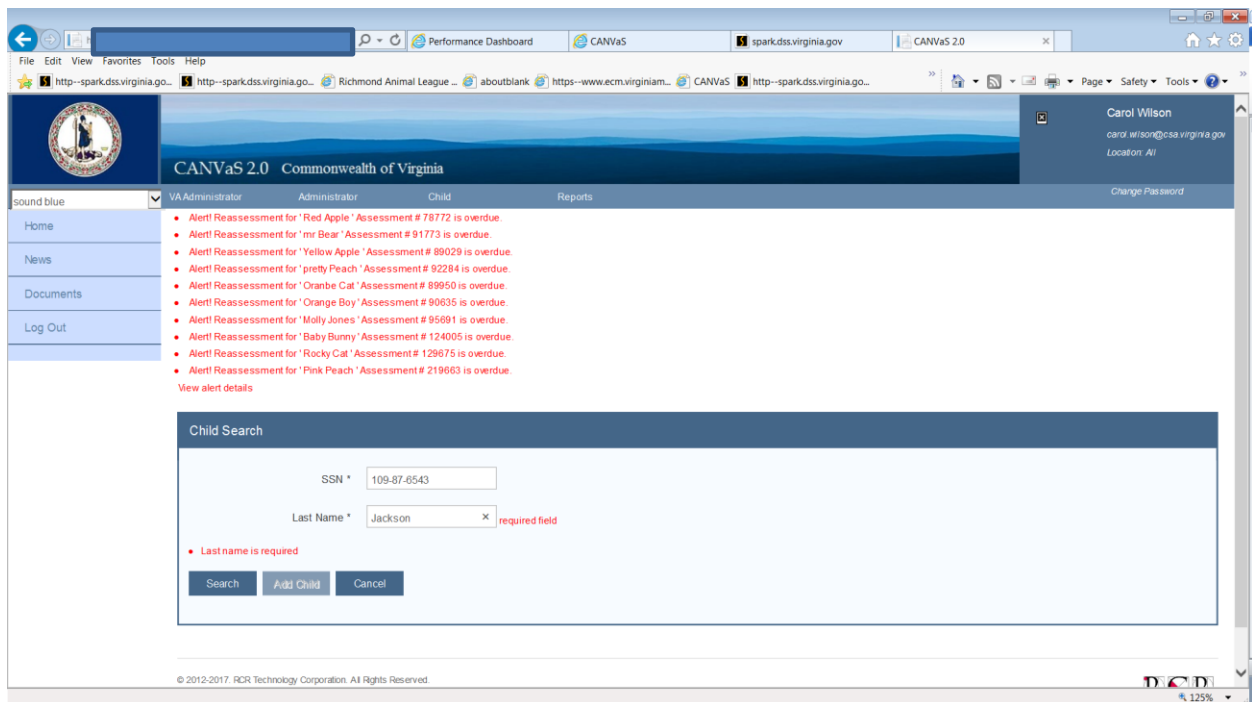
CANVaS 2.0 will create one account with one log-in ID for users who work in more than one locality. However, there was no mechanism to merge these accounts in multiple localities prior to conversion. Accounts will be manually merged by OCS. Until that time, users should continue to log in to the individual locality of the youth or child for whom the assessment is being done. You will follow the above steps to access the individual locality you need.

New users who require access to more than one locality will have only one account created with multiple locations from which to select.

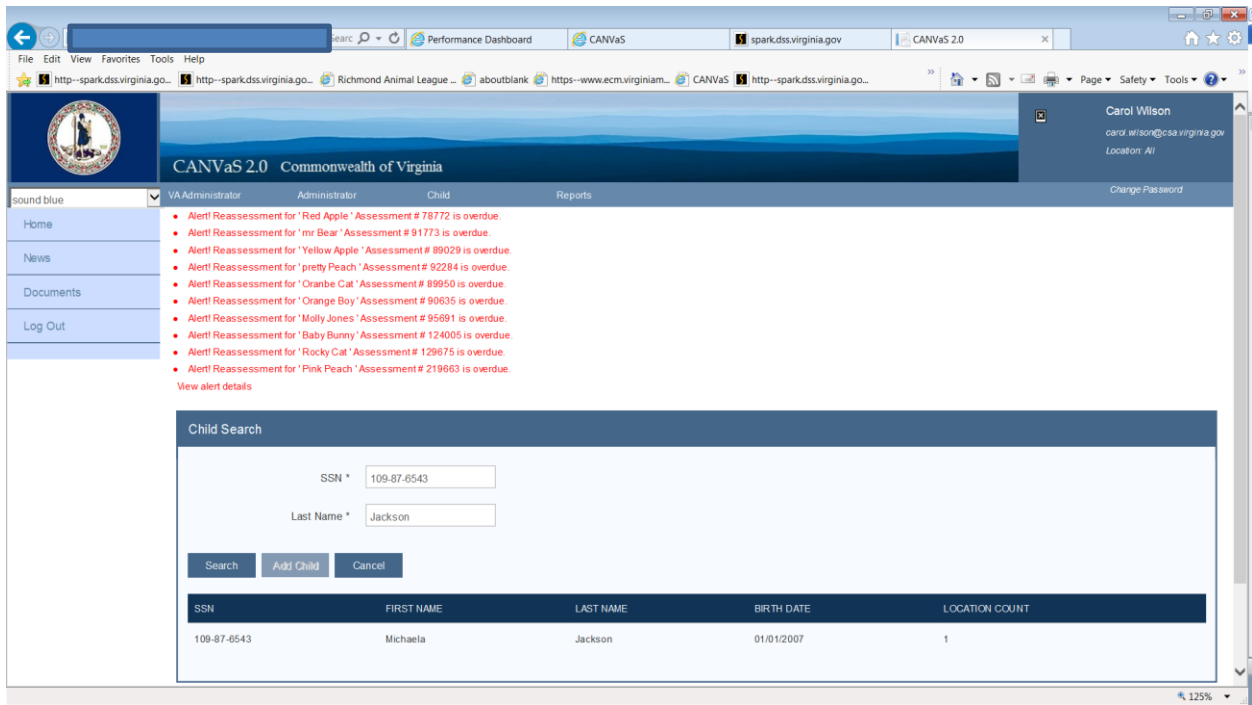
**Finding and updating an existing child in CANVaS (Adding referral source and caregivers)**

To locate a child whose information is already in CANVaS, click on the “Child” tab and then “Child Search” at the top of the page. Just as with CANVaS 1.0 you will search for a child by the child’s unique identifier (SSN) and last name. (If the SS number in CANVaS is incorrect, please edit and correct the number once you have located the child’s page.)

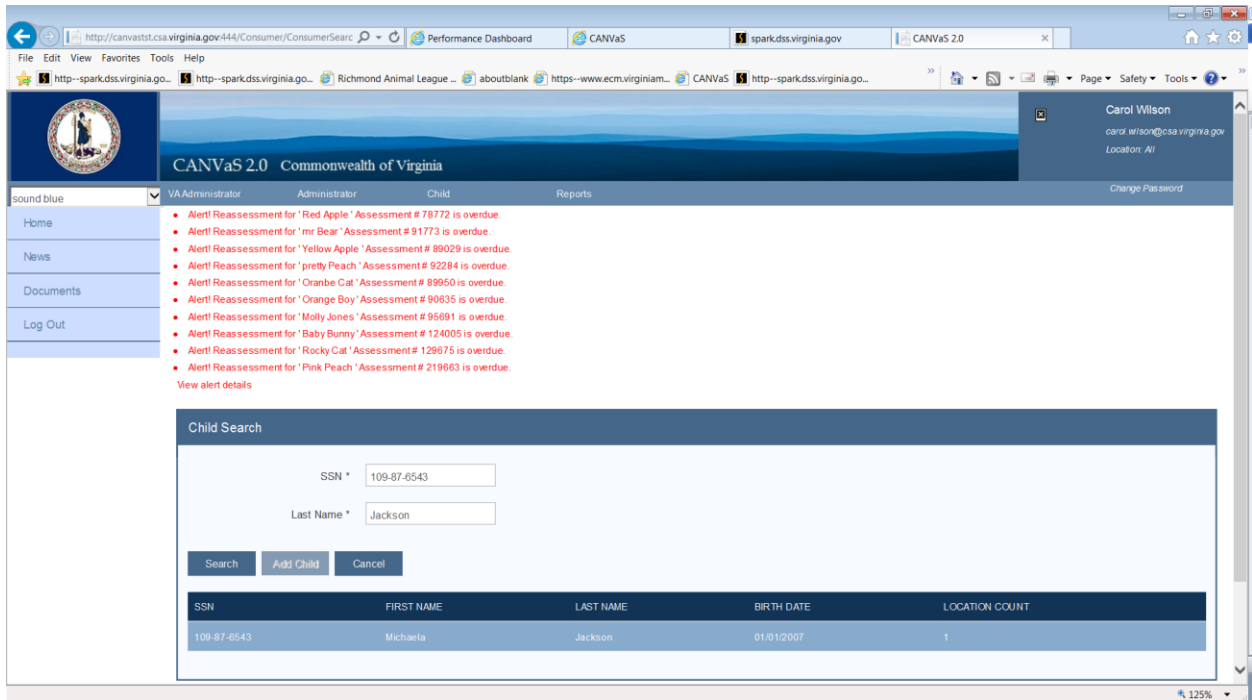
On the search page enter the SSN and child’s last name. Click “Search.”



If the child is located, the name and other information will appear in a drop down.



Double-click on the bar with the child's name.



The child's information will appear. For children already in the system, you may need to provide some updates. **IMPORTANT:** Click on "Edit" to select the referral source. If the child does not have a referral

source, select one from the drop-down choices. NOTE: \*\*\*\*This step is important as it will guide the type of assessment. For all DSS cases, select "DSS."\*\*\*\*\*

Log Out

- Alert! Reassessment for 'Molly Jones' Assessment # 95891 is overdue.
- Alert! Reassessment for 'Baby Bunny' Assessment # 124005 is overdue.
- Alert! Reassessment for 'Rocky Cat' Assessment # 129875 is overdue.
- Alert! Reassessment for 'Pink Peach' Assessment # 219663 is overdue.

[View alert details](#)

### Edit Michaela Jackson

These are the fields of the record that can be edited.

First Name *	Michaela	Referral Source *	-- select item -- DSS
Last Name *	Jackson	OASIS ID *	DOE
Middle Name		Race *	CSB Family Other
Birth Date *	01/01/2007	Gender *	Female
SSN *	109-87-6543	Ethnicity *	Non Hispanic
Medicaid ID			

\* - indicates required field

Save Add Caregiver Delete Cancel

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Click "Save" in the lower left hand corner of the screen.

You will return to the child's main page.

Next, some children in the existing system will have caregivers listed, depending upon whether one was named in CANVaS 1.0. To view, click on the "Caregiver" tab.

**View Michaela Jackson**

First Name: Michaela      Referral Source: DSS  
 Last Name: Jackson      DSS ID: 75896  
 Middle Name:      Race: Caucasian  
 Birth Date: 01/01/2007      Gender: Female  
 SSN: 6543      Ethnicity: Non Hispanic  
 Medicaid ID:

Buttons: Add Child, Edit, Add Location, Add Caregiver, Add Assessment, Delete, Cancel

FIRST NAME	LAST NAME	RELATIONSHIP	STATUS
Amanda	Jackson	Mother	Active

URL: http://canvastst.csa.virginia.gov/444/Consumer/ConsumerView.aspx?nav=i#

**Edit Caregiver**

These are the fields of the record that can be edited.

First Name \* Amanda      Zipcode:   
 Last Name \* Jackson      Email:   
 Address 1:       Phone:   
 Address 2:       Relationship \* Mother  
 City:       Active:   
 State \* Virginia

\* - indicates required field

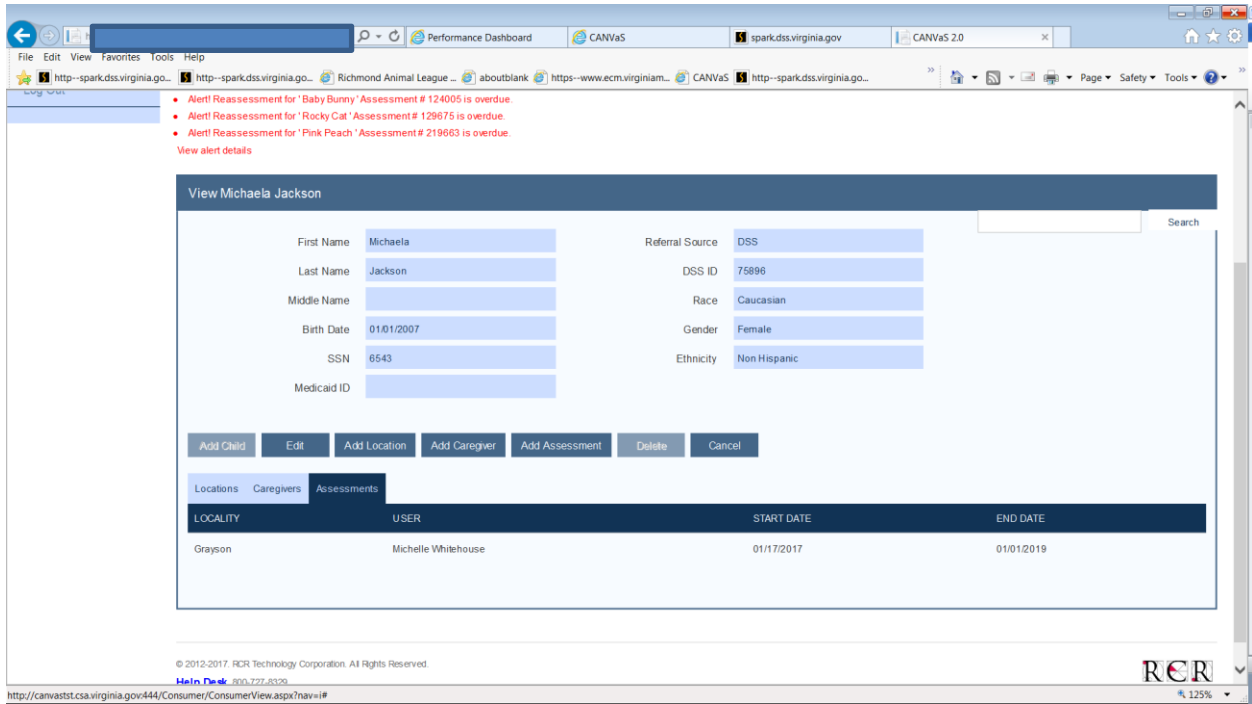
Buttons: Save, Delete, Cancel

If the correct caregiver is listed and the status is “active” you do not need to do anything. If you wish to make a change, click on “edit.” The following screen will appear. Only four elements are required; first name, last name, state and relationship to child.

Ensure that the box next to “Active” is checked. If not, click on that box.

Click “Save” and return to the “View Caregiver page” to confirm your changes. Then, select “Back to Child View” page.

To add another caregiver, select “Add Caregiver.” On the Caregiver page enter the necessary information. The system will default to “Active.” Click “Save” and “Return to Main Child Page.”



To see what assessments exist for this child select “Assessments.”



The screenshot shows the CANVaS 2.0 interface for viewing a child's profile. At the top, there are browser tabs and a navigation bar. Below the navigation bar, there are several red alert messages: "Alert! Reassessment for 'Baby Bunny' Assessment # 124005 is overdue", "Alert! Reassessment for 'Rocky Cat' Assessment # 129675 is overdue", and "Alert! Reassessment for 'Pink Peach' Assessment # 219663 is overdue".

The main content area is titled "View Michaela Jackson" and contains a form with the following fields:

- First Name: Michaela
- Last Name: Jackson
- Middle Name: (empty)
- Birth Date: 01/01/2007
- SSN: 6543
- Medicaid ID: (empty)
- Referral Source: DSS
- DSS ID: 75896
- Race: Caucasian
- Gender: Female
- Ethnicity: Non Hispanic

Below the form are several buttons: "Add Child", "Edit", "Add Location", "Add Caregiver", "Add Assessment", "Delete", and "Cancel".

Underneath the buttons are three tabs: "Locations", "Caregivers", and "Assessments". The "Assessments" tab is active, showing a table with the following data:

ASSESSMENT #	TOOL	REFERRAL SOURCE	ASSESSMENT REASON	ASSESSMENT STATUS	LOCALITY	START DATE	CLOSED DATE	CLOSED BY	DISPLAY REPORT	DELETE
234972	CANS Comprehensive 5+	DSS	Initial	CLOSED	Grayson	08/01/2016	01/17/2017	Michelle Whitehouse	<a href="#">Report</a>	

The URL at the bottom of the browser is <http://canvastst.csa.virginia.gov/444/Consumer/ConsumerView.aspx?nav=i>.

### **Adding an Assessment**

To add an assessment for this child, select “Add Assessment.”

If the child has an initial assessment, you will have two choices, Reassessment or Discharge. Select one. If a reassessment, you should select “Reassessment” in the next drop-down. If a Discharge CANS, you will select “CANS Comprehensive”. The referral source is pre-populated. The locality will default to the locality into which you have logged. Enter the date the child’s assessment was conducted. Your name should appear in the drop-down box for “Certified Assessor.” Lastly, select the “Assessment Mode”. The system will default to “Interview Mode”, which provides the question and item rating definitions. Case managers may select “Interview Mode” or “Rapid Entry Mode”. Use “Interview Mode” until you are familiar with the items and their definitions.

Click “Start Assessment.”

To see what assessments already exist for the child, select “Assessments.”

View Cindy Sweet

First Name: Cindy      Referral Source: DSS  
 Last Name: Sweet      DSS ID: 123459382  
 Middle Name:      Race: Caucasian  
 Birth Date: 01/01/2003      Gender: Female  
 SSN: 8171      Ethnicity: Non Hispanic  
 Medicaid ID:

Buttons: Add Child, Edit, Add Location, Add Caregiver, Add Assessment, Delete, Cancel

ASSESSMENT #	TOOL	REFERRAL SOURCE	ASSESSMENT REASON	ASSESSMENT STATUS	LOCALITY	START DATE	CLOSED DATE	CLOSED BY	DISPLAY REPORT	DELETE
234993	CANS Reassessment 5+	DSS	Reassessment	CLOSED	King William	02/14/2017	02/14/2017	Mike Smith	<a href="#">Report</a>	
234992	CANS Comprehensive 5+	DOE	Initial	CLOSED	King William	02/14/2017	02/14/2017	Mike Smith	<a href="#">Report</a>	

This is the first page of the "Interview Mode" for the DSS-Enhanced Reassessment Birth to 21.

Alert! Reassessment for 'Molly Jones' Assessment # 95691 is overdue.  
 Alert! Reassessment for 'Baby Bunny' Assessment # 124005 is overdue.  
 Alert! Reassessment for 'Rocky Cat' Assessment # 129675 is overdue.  
 Alert! Reassessment for 'Pink Peach' Assessment # 219663 is overdue.  
[View alert details](#)

CANS Reassessment 5+ assessment (# 234976 ) for Michaela Jackson  
 Entry Mode: Interview Mode      Status: Open      Referral Source: DSS      Assessment Reason: Reassessment

**General Questions: INTENSIVE COMMUNITY-BASED SERVICES**  
 Has the child received intensive community-based services in the last six months, and if so, were these services successful?  
 Child has not received community-based services.  
 The child has received community-based services and the services were successful.  
 The child has received community-based services and the services were not successful.

Comments:

Buttons: Next, Last

Page 1 of 64  
 Buttons: Save Assessment, Save & Close Assessment, Back to Child View, Caregiver Assessment

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If you selected “Rapid Entry Mode” the first page of the assessment will look like this:

General Questions (Please answer according to anchor definitions.)					
	0	1	2	3	Comments
» INTENSIVE COMMUNITY-BASED SERVICES	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
» CHILD REMOVAL	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
» CHILD AGE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
» CURRENT PLACEMENT - Foster Home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
» CURRENT PLACEMENT - Group Home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
» CURRENT PLACEMENT - Residential Treatment Center	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
» CURRENT PLACEMENT - FamilyRelation Home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

Life Domain Functioning (0 = No Evidence of Problems; 1 = History, Mild; 2 = Moderate; 3 = Severe)					
	0	1	2	3	Comments
» FAMILY	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
» LIVING SITUATION	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
» SLEEP	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
» SOCIAL FUNCTIONING	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

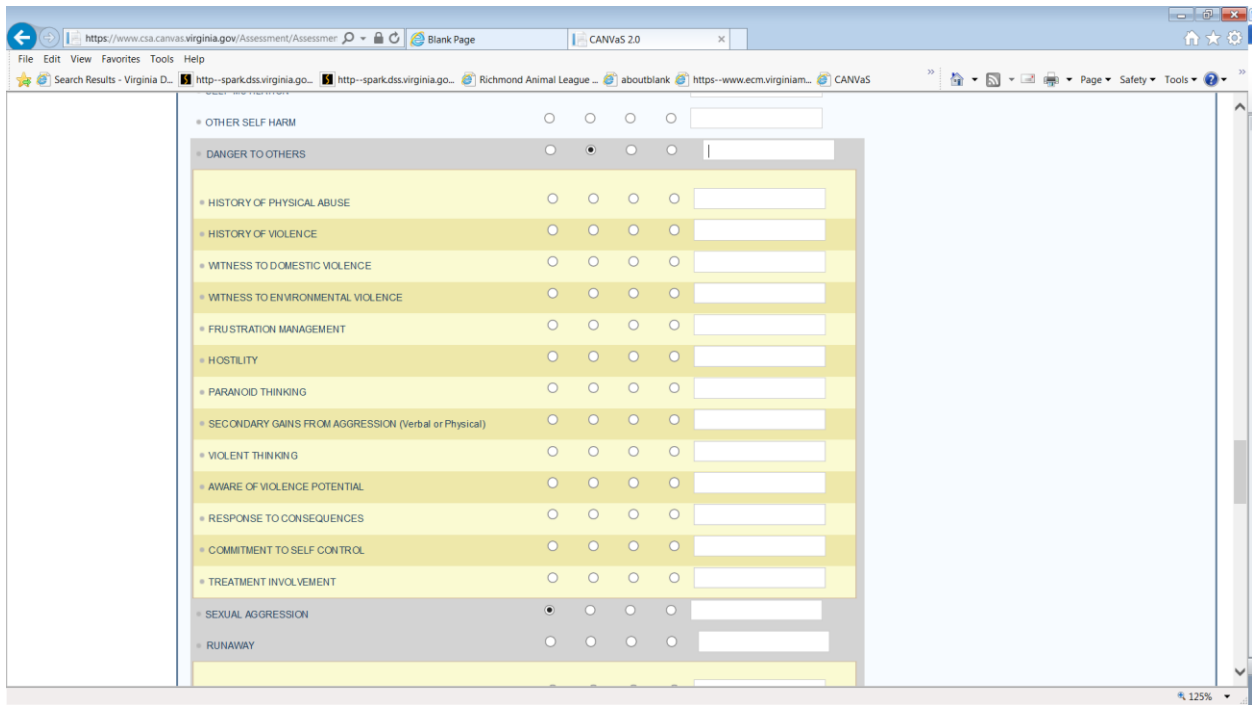
If you do not know how to rate the General Questions section, you may switch to “Interview Mode” to see the rating definitions or see the last page of this document (General Questions Section).

Select and click on the “bubble” for the appropriate rating for each item. A ‘Comments’ box is provided if you wish to add any notes regarding this item. For example, if you rated a “1” or “2” on “Talents/Interests” you might want to write in the comments box what that specific talent or interest is (e.g., musical: singing, playing the guitar or artistic: drawing, theatre, etc.) These comments will print on the assessment report.

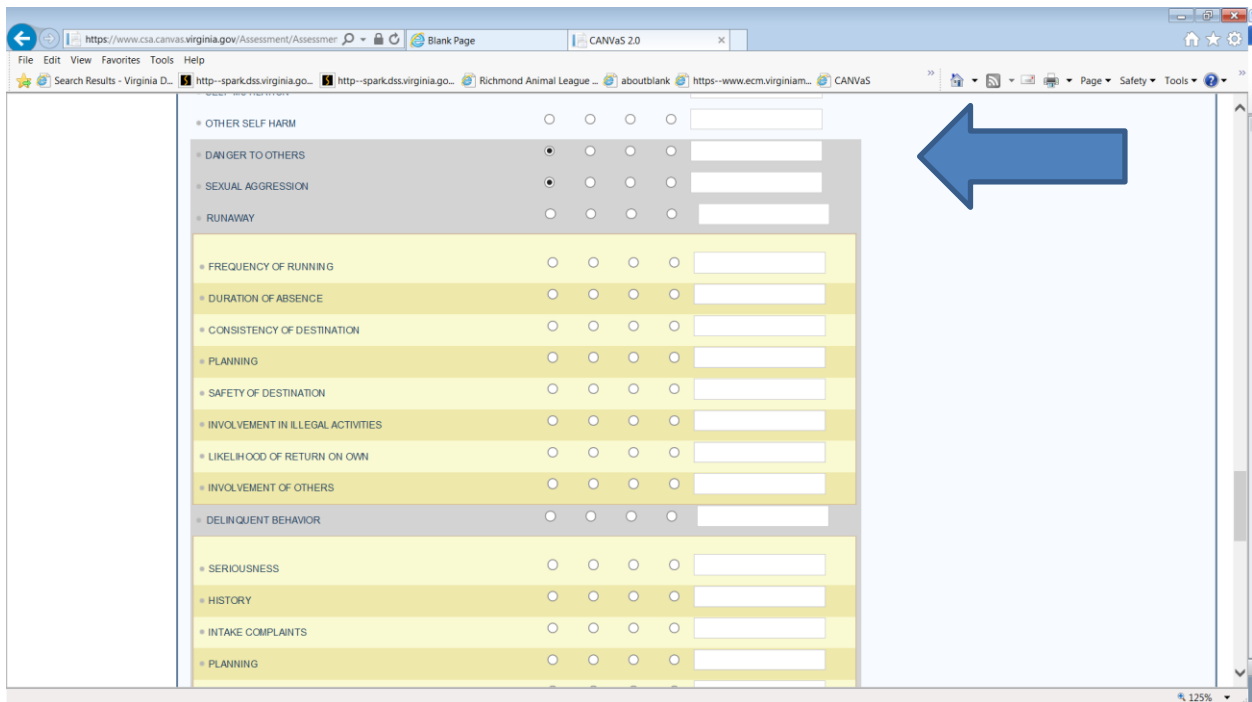
If you are a DSS user, you must always rate the Trauma Module. If you are a non-DSS user, you will only rate the Trauma Module if the “Adjustment to Trauma” item is rated a “1” or higher.

Otherwise, modules work the same way they do in CANVAS 1.0. The modules are open (displayed) under the trigger items. If you rate a “0” on the trigger item, the module items will collapse and you will not rate the module. If you rate a “1” or higher on the trigger item, you must complete the module.

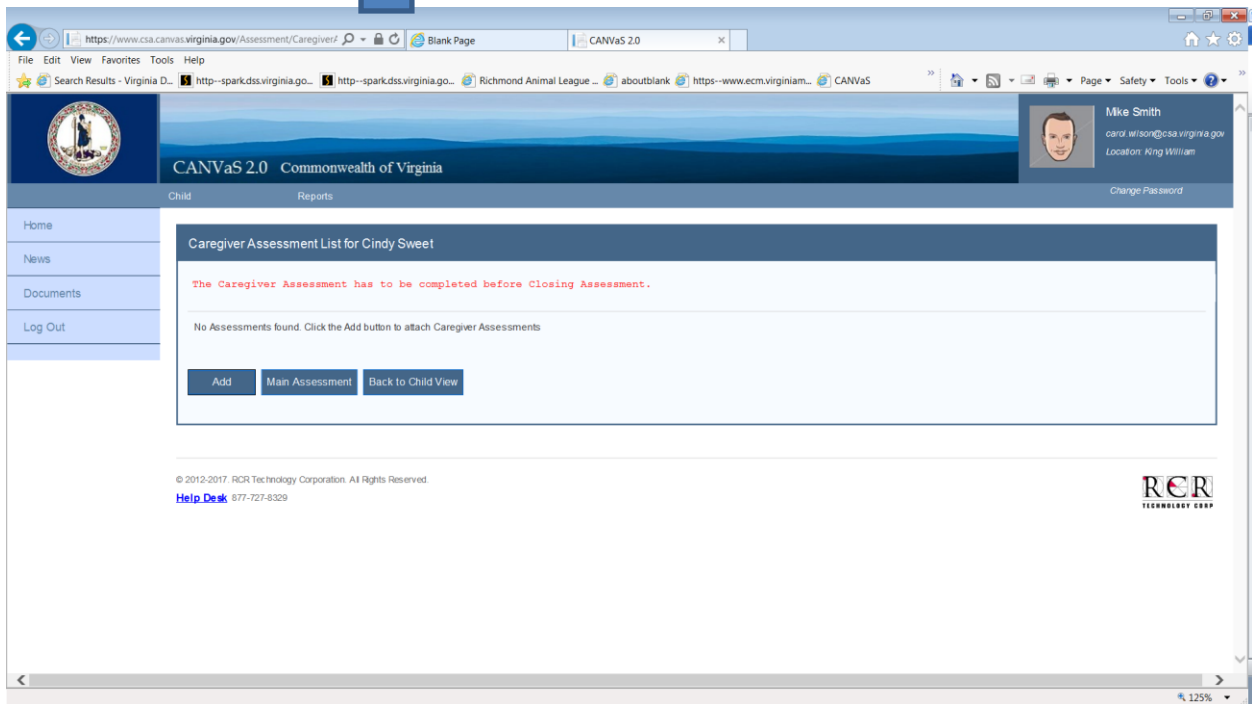
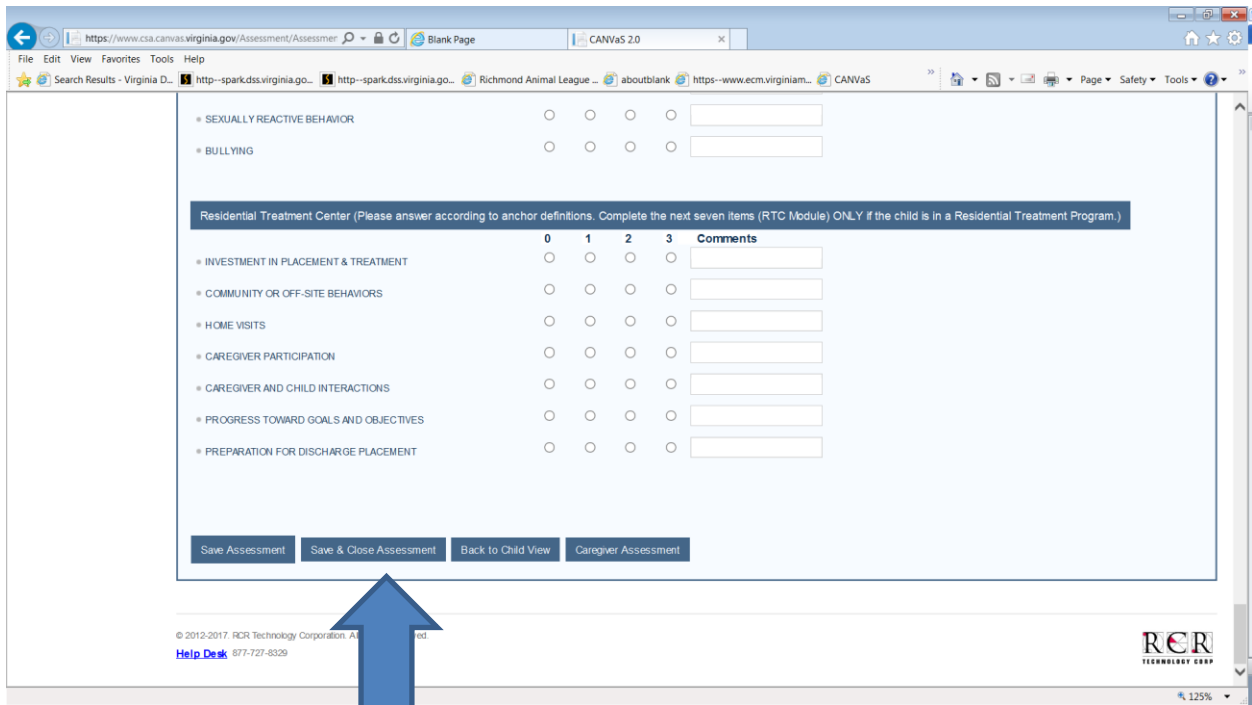
The Violence Module (triggered by the “Danger to Others” item) is open in the shot below:



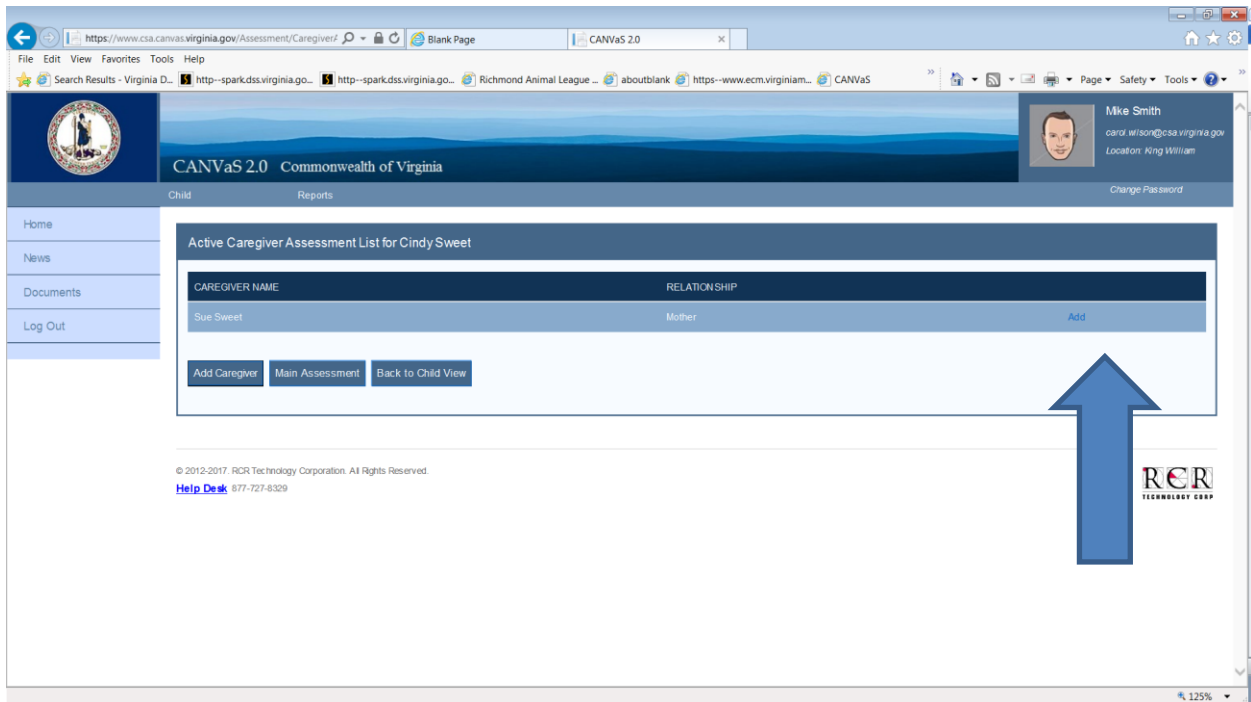
If rated a “0” on the “Danger to Others” item, the Violence Module collapses and is no longer visible.



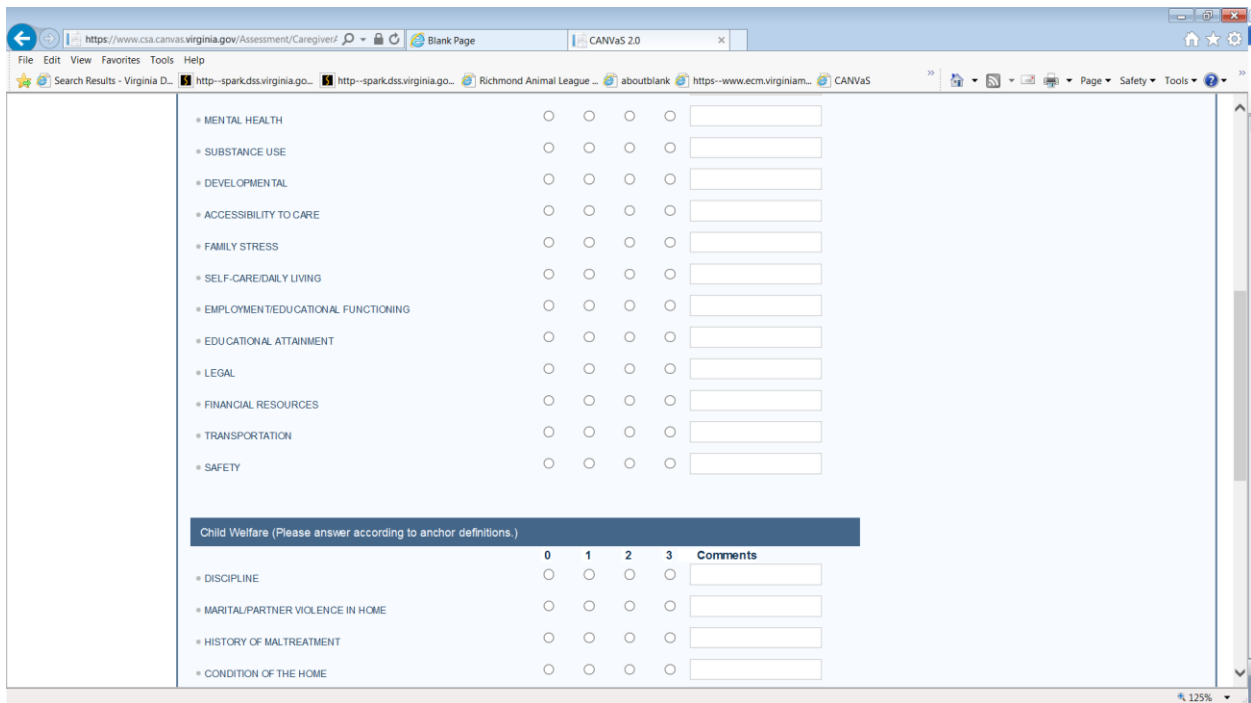
When you reach the bottom of the page, click “Save and Close Assessment.” You will be prompted to complete the “Caregiver Assessment.”



To add the Caregiver assessment, you must click "Add."



If you are completing the DSS-Enhanced version, you will complete the “Parent Strengths and Needs Domain” as well as the “Child Welfare Module.” Up to three caregivers may be rated.



**IMPORTANT FOR \*\*\*DSS USERS:** For the Child Welfare Module, you should apply the item to the individual caregiver that you are rating. For example “Condition of the Home” refers to the home of the caregiver you are rating.

If you are completing the Standard (non-DSS) version, you will only complete the “Parent/Caregiver Strengths and Needs Domain”. Only one caregiver may be rated.

Click “Save Assessment” then “Back to Main Assessment” at the bottom of the page. If the assessment is complete, scroll to the bottom of the page and click “Save and Close Assessment.” If the caregiver assessment has not been rated, the system will prompt you to return. Click “Edit” to finish the assessment.

If an item anywhere in the assessment has not been rated, the system will notify you at the top of the screen in red font.

The screenshot shows the CANVaS 2.0 assessment interface. At the top, there is a navigation bar with the CANVaS 2.0 logo and the user's name, Mike Smith. Below the navigation bar, there is a sidebar with links for Home, News, Documents, and Log Out. The main content area displays the assessment details for Cindy Sweet, including the entry mode (Rapid Entry Mode), status (Open), referral source (DSS), and assessment reason (Reassessment). A red notification banner states: "Not all required questions have been answered in the following module: Child Strengths/Resiliency". Below this, there is a table for "General Questions (Please answer according to anchor definitions.)" with columns for ratings 0, 1, 2, 3, and a Comments column. The table lists several items with their corresponding ratings and checkboxes. The "Life Domain Functioning" section is also visible at the bottom of the screenshot.

General Questions (Please answer according to anchor definitions.)	0	1	2	3	Comments
INTENSIVE COMMUNITY-BASED SERVICES	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
CHILD REMOVAL	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
CHILD AGE	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
CURRENT PLACEMENT - Foster Home	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
CURRENT PLACEMENT - Group Home	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
CURRENT PLACEMENT - Residential Treatment Center	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
CURRENT PLACEMENT - FamilyRelation Home	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Life Domain Functioning (0 = No Evidence of Problems, 1 = History, Mild; 2 = Moderate, 3 = Severe)	0	1	2	3	Comments
FAMILY	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Complete the assessment and then “Save and Close Assessment.”

When the assessment closes, the algorithm will run. The recommendation will be that either the child’s needs meet or do not meet the requirements for residential treatment.

The algorithm recommendation is based on a profile of the child’s ratings on specific items. If the ratings “match” the algorithm profile, research indicates that the youth may benefit from residential treatment. However, a number of other factors must be considered by the FAPT in making such a decision and the algorithm recommendation is only one piece of information. There is no requirement to follow the algorithm recommendation. It may, however, be used to support a decision to place or not to place a child into residential treatment.

## Printing an Assessment

To print a completed assessment, click on the “Assessments” tab on the “View Child Page.”

The screenshot shows the CANVaS 2.0 interface for the Commonwealth of Virginia. The user is logged in as Mike Smith. The page title is "View Kenisha Jackson". The child's information is displayed in a form:

First Name	Kenisha	Referral Source	DSS
Last Name	Jackson	DSS ID	78654
Middle Name		Race	Biracial
Birth Date	01/01/2001	Gender	Female
SSN	4131	Ethnicity	Non Hispanic
Medicaid ID			

Below the form are buttons for "Add Child", "Edit", "Add Location", "Add Caregiver", "Add Assessment", "Delete", and "Cancel". There are also tabs for "Locations", "Caregivers", and "Assessments". The "Assessments" tab is active, showing a table of assessment records:

ASSESSMENT #	TOOL	REFERRAL SOURCE	ASSESSMENT REASON	ASSESSMENT STATUS	LOCALITY	START DATE	CLOSED DATE	CLOSED BY	DISPLAY REPORT	DELETE
234980	CANS Reassessment 5+	DSS	Reassessment	CLOSED	King William	02/13/2017	02/13/2017	Sue Whitehouse	<a href="#">Report</a>	
234977	CANS Comprehensive 5+	DSS	Initial	CLOSED	King William	02/13/2017	02/13/2017	Carol Wilson	<a href="#">Report</a>	

Select the “Report” link for the assessment you wish to print.

The first page of the report looks like this:

The screenshot shows the "Child Assessment Detail Report" for Kenisha Jackson. The report includes the following information:

Run Date: 2/13/2017 10:20:52 AM  
CANS Reassessment - 5+  
Child: Kenisha Jackson  
Assessment Number: 234980  
Status: CLOSED

**Information Detail**

Referral Source: DSS  
DSS ID: 78654  
Birthdate: 01/01/2001  
Gender: Female

Case Manager: Sue Whitehouse  
Case Manager Signature: [Signature Box]  
Locality: King William  
Phone:  
Email: carol.wilson@csa.virginia.gov

**Assessment Detail**

Assessment Date: 2/13/2017 4:40:22 PM  
Assessment Number: 234980  
Completion Date: 2/13/2017 4:43:41 PM  
Assessment Reason: Reassessment  
Assessment Status: CLOSED

**Algorithm Results:** The assessment is closed. The child's assessment does not meet the algorithm requirements for residential treatment.

Caregiver	Relationship
Kristina Smith	Aunt



There are multiple pages which may be accessed by clicking the page number or the arrow in the upper left hand side of the screen.

To print the report, just as with CANVaS 1.0, click on the print icon and select “PDF” from the drop-down choices.

**Child Assessment Detail Report** 1 of 5

Run Date: 2/19/2017 10:20:52 AM CANS Reassessment - 5+

Child: **Kenisha Jackson** Assessment Number: 234980 Status: **CLOSED**

**Information Detail** Case Manager: **Sue Whitehouse**

Referral Source: **DSS**

DSS ID: 78654

Birthdate: 01/01/2001

Gender: **Female**

Case Manager Signature

Locality: **King William**

Phone:

Email: **carol.wilson@csa.virginia.gov**

**Assessment Detail** Assessment Date: 2/13/2017 4:40:22 PM

Assessment Number: 234980 Completion Date: 2/13/2017 4:43:41 PM

Assessment Reason: **Reassessment** Assessment Status: **CLOSED**

**Algorithm Results:** **The assessment is closed. The child's assessment does not meet the algorithm requirements for residential treatment.**

Caregiver	Relationship
Kristina Smith	Aunt

The system will ask if you want to open or save the document. To print, select “Open”. You may then print from your browser.

*This document is a basic outline for existing CANVaS users to log in and complete assessments. 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](mailto:canvas@rcrtechnology.com)*

*Office of Children’s Services  
February 2017*

**General Questions Section:**  
(excerpt from *Navigating CANVAS*)

The first page, entitled “General Questions” must be completed. These questions and options for rating may also be viewed in “Interview Mode.” The questions and rating definitions are:

- 1. Has the child received intensive community based services in the past six months, and if so, were those services successful?**
  - “0” Child has not received community-based services.
  - “1” Child has received community-based services and the services were successful.
  - “2” Child has received community-based services and the services were not successful.
  
- 2. Has the decision been made by DSS (Department of Social Services) or the J&DR (Juvenile and Domestic Relations) court to currently remove the child from home?**
  - “0” No, a decision has not been made.
  - “1” Yes, a decision has been made.
  
- 3. Child’s Age**
  - “0” The child is ages 5-13.
  - “1” The child is ages 14-17.
  - “2” The child is age 18 or older.
  
- 4. Child’s Placement (Rate “0” for NO and “1” for YES.) Rate the child’s primary placement.**

Foster Home: Is the child currently placed in a foster home?

  - “0” No, the child spends no time in a foster home.
  - “1” Yes, the child spends at least some time in a foster home.

Group Home: Is the child currently placed in a group home?

  - “0” No, the child spends no time in a group home.
  - “1” Yes, the child spends at least some time in a group home.

Residential Treatment Center: Is the child currently placed in a residential treatment center?

  - “0” No, the child spends no time in a residential treatment center.
  - “1” Yes, the child spends at least some time in a residential treatment center.

Family/Relation Home: Is the child currently placed with family or relative?

  - “0” No, the child spends no time in a family or relative’s home.
  - “1” Yes, the child spends at least some time in a family or relative’s home.