SISOnline Technical User Guide: SIS-A SIS-C Venture User Admin

Developed By

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Last revised 9/28/2015 SISOnline

Contents

Part 1. Getting Started with SISOnline

1. Basic Steps for Using SISOnline (SIS-A or SIS-C)

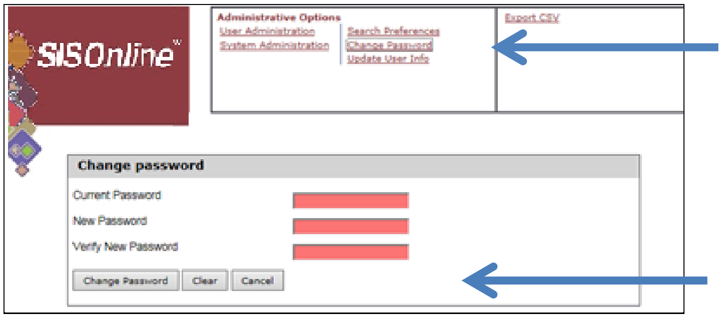
Basic guidelines are provided here for getting started with the SISOnline system. This new version of the SIS is improved with the user in mind. For example, the re-ordering of some items provides for ease of interviewing and the new technical features will make it easier to manage your work. This technical user guide is provided to help you as you encounter questions while using SISOnline.

Note: SISOnline can be accessed via the Chrome web browser using iPad (iOS) or Android tablets; though we may need to test your particular version of the device to ensure it works for all features. SIS Venture is a standalone application that installs on Windows 7, 8 or 10, allowing users to collect data without an Internet connection.

Login to SISOnline

A. Go to https://www2.sis-online.org
B. In the SIS Online Login box, enter your username or password is case-sensitive.
C. Click the **Login** button

Upon the initial login, the temporary password provided for a new account will expire and you will be prompted to change your password to one of your liking. Click on "change password" from the top menu, see the top arrow below. The selection box will open and you can enter your new password *(see information that follows about selecting a new password*). This is a good time to update your user info (3rd link) to easily transfer user information to your records. If you have any difficulty with the login, please ask your supervisor or email the help desk: help@sis-online.org. Login credentials are case sensitive.



Best Practices in Selecting and Securing Your Password

Unauthorized users typically gain access to a site due to weak passwords. Each SISOnline user has a responsibility to protect the data by selecting a strong password and safely managing it.

Selecting a password

Strong passwords have the following characteristics:

- Contain both upper and lower case characters (e.g., a-z, A-Z)
- Have digits and punctuation characters as well as letters, e.g., 0-9, !@#$%^&*()_+|~-=\`{}[]:";'<>?)
- Are at least eight alphanumeric characters long
- Create a password that you easily remember. One way to do this is create a password based on a song title, affirmation, or other phrase. For example, the phrase might be: "This May Be One Way To Remember" and the password could be: "TmB1w2R!" or a variation.

Securing your password

Do not use the same password for your SIS-A account as you do for other applications (e.g., personal ISP account, option trading, benefits, etc.). All passwords should be treated as sensitive, confidential information. Remember not to:

- Reveal your password over the phone to ANYONE or discuss it in front of others.
- Send it in an email message or store them in your office..
- Hint at the format of a password (e.g., "my family name").
- Use the “Remember Password" feature of applications.

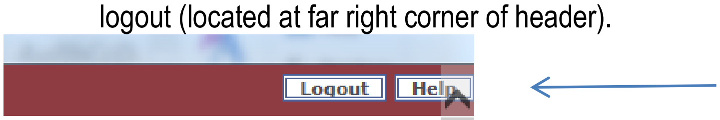
2. The SISOnline Search Page

After logging in, you’ll see the new SISOnline Search Page--it is your control panel—from here you can create a SIS-A record, search for completed records, run reports, and access the user admin. The page appears almost divided in half by the type of searching you might do in your SIS work.

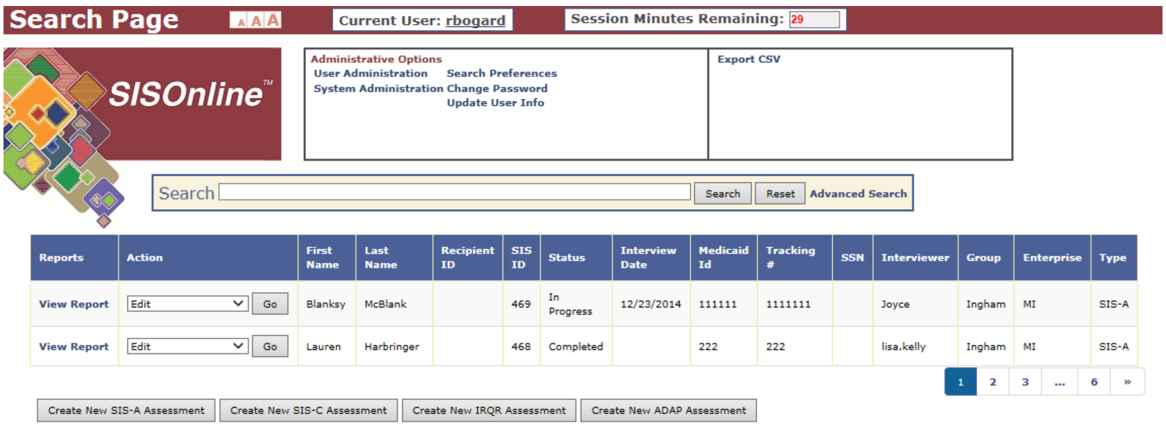
Search Options (Top Section of Search Page)

Items on the **top of the search page** (below) on closer look, you’ll see:

- The top band lists the username logged in, allows the user to enlarge the type and get help or logout (located at far right corner of header).



- Directly below are boxes with links for accessing administrative options, reports and charts.
- Below this is a Search, a Google-type search engine, where you can type in text or numbers to access recipients or records.
- The next area is the recipient grid. The grid allows the user to access records, view reports. A link for creating a new record is below the recipient grid.



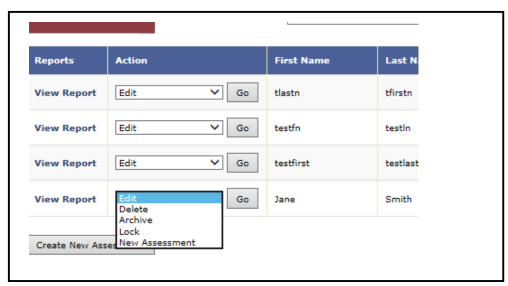
<u>The Top Blue Header</u>

The header above the assessment grid has labels to help you identify your record or make changes to it or view the report. Each record is identified in several ways—SIS_id, Tracking_id, Recipient_id, Medicaid_id. These are useful if you need to track or find the record.

<u>Task Options in the Assessment Grid</u>

Here are options available to the user via the recipient grid:

<u>1. Action Bar</u>



A. **Create a new assessment record**: Click the Create Assessment button in below the grid to open a blank assessment record form. You can then begin filling in the data.
B. **Edit an assessment record**: Click the Edit link to open the assessment record and enter data. Organizations can choose to have records automatically locked after two weeks. All records are locked when still incomplete for three weeks.
C. **Delete an assessment record:** (Available only with permission.) Click the Delete link to delete the assessment record with the SIS-ID in the row. The delete is a logical delete meaning the data can still be retrieved later through an undelete operation if needed. The link is only visible if your user has the allow delete permission.
D. **Undelete an assessment record**: (Available only with permission.) Click the Undelete link to undelete the assessment record. The undelete link is only visible for records that have a deleted status and if your user has the allow delete permission.
E. **Search for an assessment record**. To locate a completed assessment record, enter identifying information such as the name, tracking number or SIS_ID in the search box.

<u>2. Reports Column</u>:

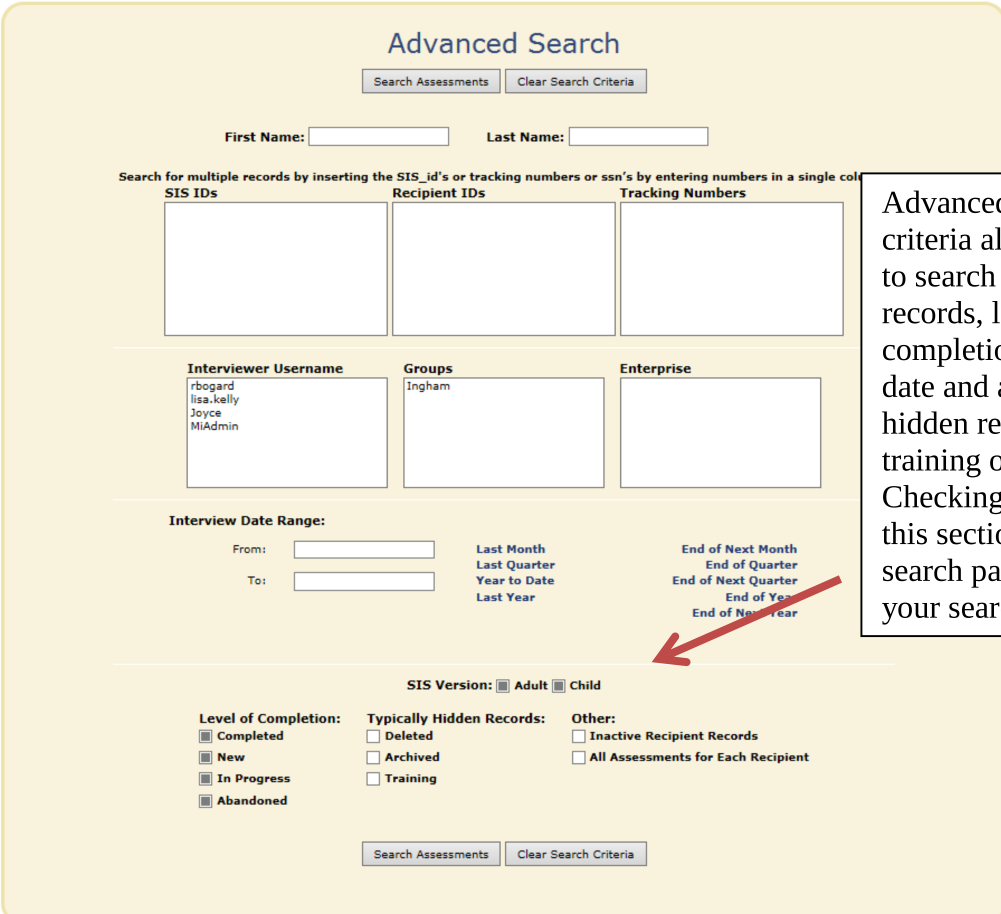
F. **View Report**: click on the View Report button of the record you have chosen. This provides options

<u>3. Create New Assessment Record</u>

At the bottom of the user grid you'll see options for creating a new SIS-A or SIS-C record (access dependent on what your state is using). Click this button and a new record will be created.

Advanced Search Options (Bottom Section of Search Page)

The **bottom part of the search page** provides additional or "advanced" search options.



Advanced Search criteria allow the user to search multiple records, level of completion interview date and also typically hidden records like training or deleted. Checking the boxes in this section of the search page refines your search.

1. **Search for Multiple Records**: You can search for a group of records by inserting multiple tracking numbers or multiple SIS_id's in the columns. They must be inserted as a single column. Selecting the "Search Assessments" button initiates the search. "Clear Search Criteria" clears the search and you can now do a different search.
2. **Search by Interview Date Range**: insert the dates and search for just those records.
3. **Level of Completion**: Uncheck the boxes you do not want to include in the search criteria. Remember if you are searching for completed reports to look for both completed and completed locked.
4. **Typically Hidden Records and Other**: These are useful criteria that you will use from time to time.

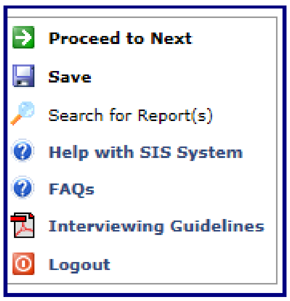
3. Navigation Icons

When you are working on a record, you can move around by using the icons, links and arrows. These are located at the top of every page and along the left side of many pages. When you open an assessment form, the arrows are located at the bottom of the page along with helpful rating tips.

- The green arrows enable you to save data and move to a previous page or the next page of the assessment form or around the site.
- The magnifying glass allows you to search for an assessment record. Click this icon to return to the “Search Criteria” box on the Search Page.
- The question mark icon allows you to access a variety of help documents and presentations.
- To log off the system, click the red box or log off button.

The Side Panel

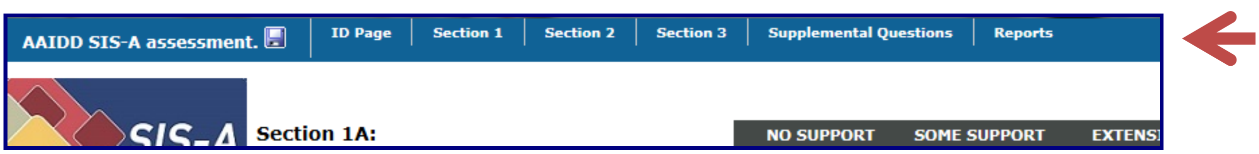
The box below will appear when you are working on any page in the record. The icons are as follows: the icon moves you to the next page. Click on **Save** if you stop an assessment for discussion during the interview or if you stop in the midst of editing. Click the (magnifying glass icon) to return to the search page. The icons provides help with FAQ on administering the SIS and with the SIS System via a user guide and help desk information. The Interviewing guidelines pdf contains helpful tips as you train to be a SIS Interviewer.



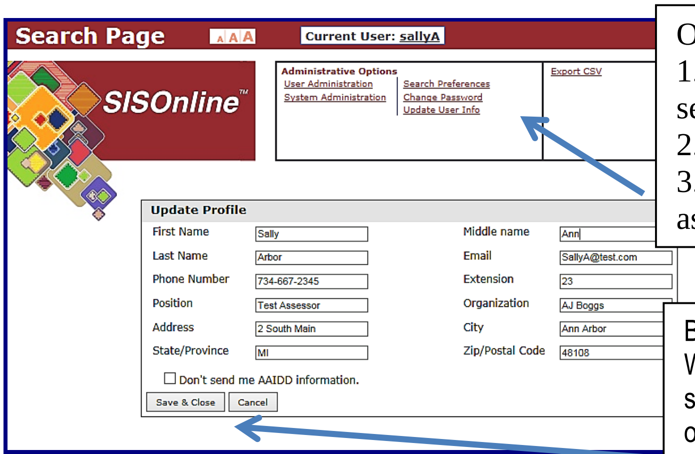
You will use these items often. Note that the Help with SIS System contains useful documents, including this technical user guide.

The Menu Bar

Within an assessment record, you can also use the selections from the Menu Bar at the top of each page in the record (SIS-A or SIS-C). This menu will help you to move from one part of a record to another or to other options. It looks like this in SIS-A and similar in SIS-C:



User Preferences



Options allow users to:
1. Change the number of records you see on the search page.
2. Change your password
3. Update your user information such as that shown in the box on the left.

Be sure to save your profile information. When you create an assessment record, select your name from the pull down menu on page and this information automatically flows into the record.

Saving Assessment Data

IMPORTANT! Assessment data is saved automatically when you move to another page within the record. Or click on the Save Icon at the top of the page. Data also saves when you log out using the logout button ().

4. The Assessment Record Information

Assessment Record Status

On the search page, notice that there are various status labels for the records. Here are the meanings of the different statuses::

1. **New**: An assessment that has data only in the first page, mostly demographic data such as name, date of birth, address, respondent's names, etc. Often this is an assessment that was created via the webservice and the interview has not been done yet.

2. **In progress**: An assessment that has some assessment ratings entered, but not all the required ratings.

3. **Completed**: An assessment that has all of the required ratings entered, but has not been locked. (Note we have a configuration setting that allows you to choose when to lock an (in days) after completing an assessment; a "0" setting will lock it the evening after the assessment is completed. The assessment can't be edited by the interviewer after it is locked. This does not change the status of a record it is still in completed status, though locked from editing.

4. **Deleted**: If a record has been deleted, it may still be retrieved by checking the deleted box on the search page.

5. **Archived**: The same as deleted, neither the archived and deleted assessments are visible unless you check the "Archived" or "Deleted" check boxes in the search criteria at the bottom of the search page (and then click the search button.)

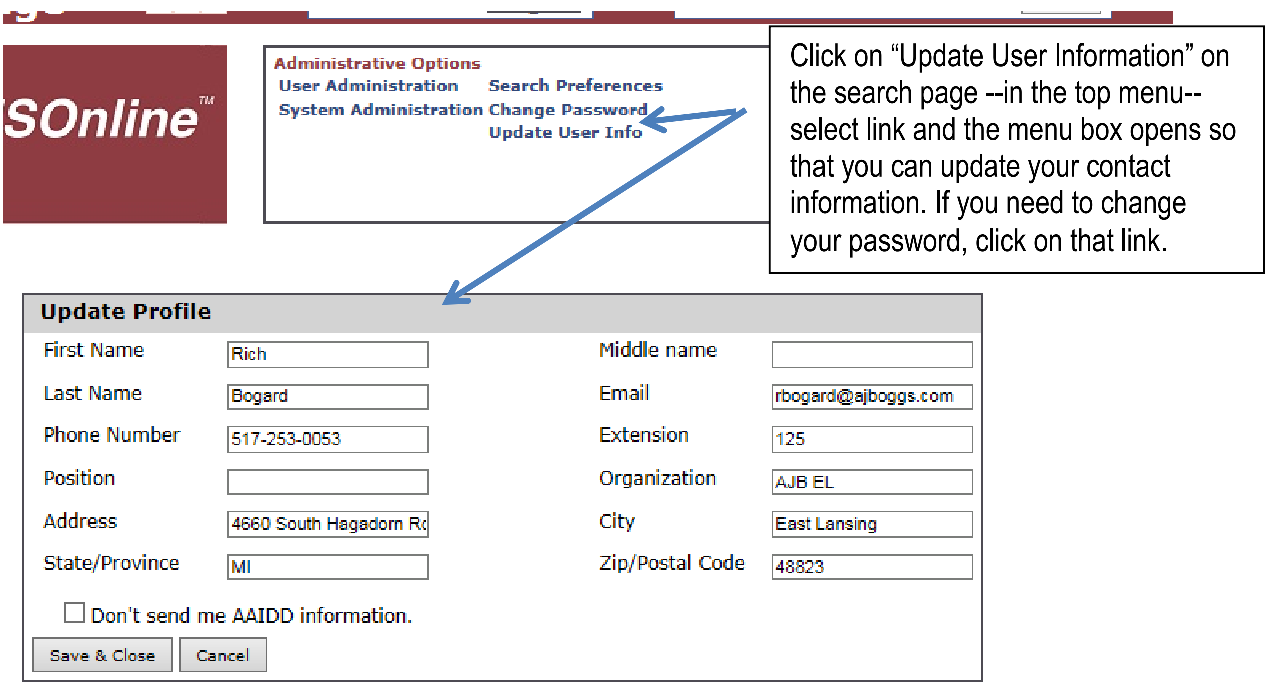
6. **Abandoned**: If an assessment has been "In progress" for more than 3 weeks, then the assessment status is changed to "Abandoned" and it is locked out without access via the website, though it is still accessible via the webservice.

<u>Partially Completed Assessment Records</u>
Limits have been placed on the time an assessment record remains editable. These are set by your enterprise (State), typically:

- Assessment records must be completed within 3 weeks of creating the record. If you do not complete an assessment record within 3 weeks, it is considered abandoned.
- Completed assessment records may usually be edited for up to 2 weeks after completion. If the recipient's situation changes, requiring that a new assessment be conducted after those 2 weeks, a new record must be created.

<u>Assigning Records</u>
Schedulers can assign a record to another interviewer by changing the interviewer if the record is in the "New" status. Otherwise, the only way to assign it is by using the "Move" function in the drop down action menu. To do this, the user doing the assigning must have the Move permission. This can be changed through the user permissions part of UAS Admin.

<u>Transfer Profile Information to Records</u>
The information you enter in your profile <u>will transfer onto each assessment record</u> you create later in either Venture or SISOnline . See the screenshot below to change or update this information.



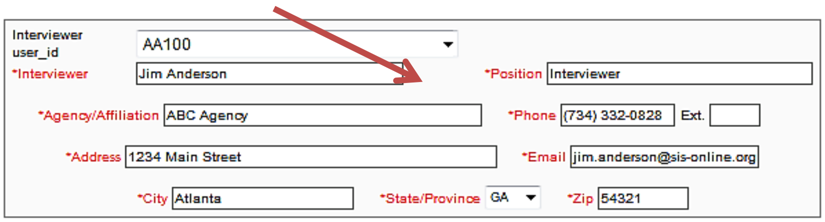
Creating New Records

This is done in a variety of ways. Some users start at step D below as a scheduler will create the record and they download it to Venture or use it online. However, in some states the user will create a new record. If you are creating a record follow steps A-F below

A. Logon to SISOnline, click the **create assessment** on the search page. A new record will open.

B. Complete the assessment record starting with the ID Profile Page. All fields labeled in red require completion before you may continue to the next section.

C. Select **your** Interviewer user_id from the dropdown menu to populate the interviewer information.

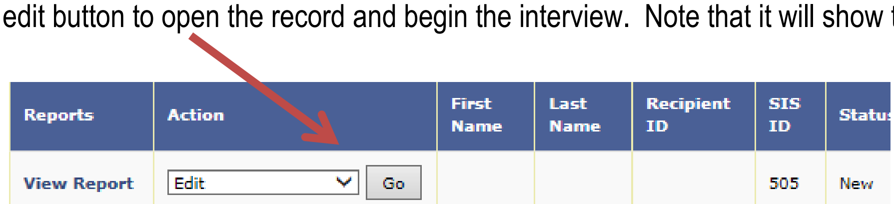


D. The new record is now ready for your interview.

E. If you are going to use Venture, the data entry module while interviewing, download the record so it will be ready for your interview. Please refer to Section 3 of this manual (Venture) to view screenshots to help you with the download process. Note that you can also create a new record in Venture by clicking on the New icon on the toolbar.

F. Once the assessment record is downloaded to Venture, close the Venture application and shut off your computer. At the interview you won't have to be connected to the internet. Open Venture and then click on the "Assessment Records" tab, and click on the "edit" link next to the assessment record you are using that day. After completing the interview, save the record.

Note that if you create the record to be used online, you can close your computer, save the record. When you want to use it (e.g., at the interview), the record will be on the search page. Click on the edit button to open the record and begin the interview. Note that it will show the status "New".

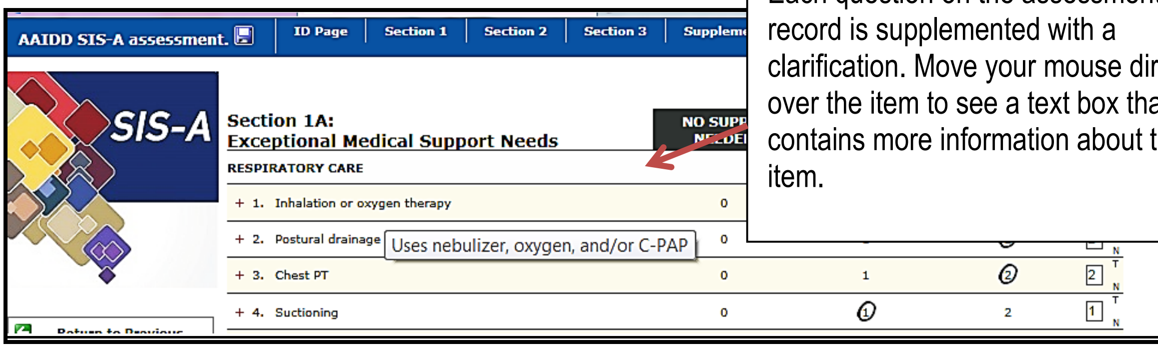


5. Using the Assessment Record

When the Profile Pages are created but no ratings entered, the record status is “New.” After any ratings have been entered, the record status is considered “In Progress.” Each page saves after you move to the next page. As you work, you will see the pages in the record are labeled at the top so you will always know where you are during the interview.

Clarification of questions (Tool Tips)

Each question on the assessment record is supplemented with a clarification. Move your mouse directly over the item to see a text box that contains more information about that item.



Entering responses on the record

Data can be entered in any order; you don’t have to enter all the items before moving to the next page as you can come back complete the unfinished items. There are two ways to enter a rating: (1) use the mouse to click the response number, or (2) use a numeric keypad by placing the cursor in the text box, enter a number, and then tab to the next box.

Detecting errors as you work

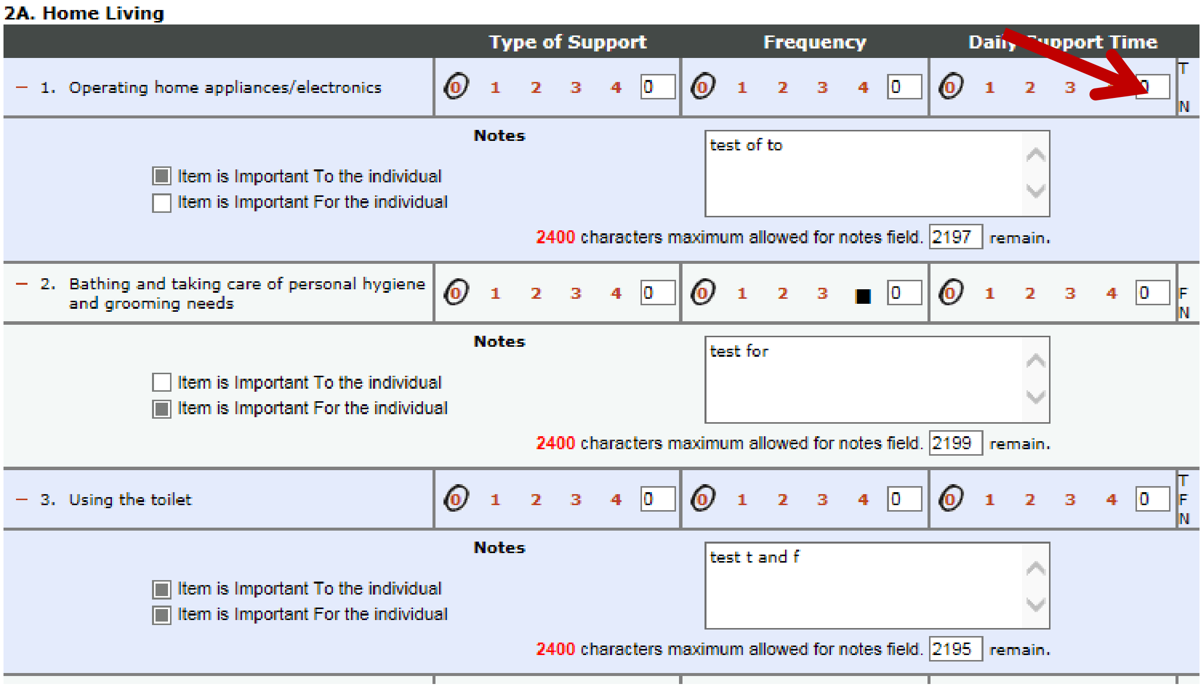
The system detects errors in item responses as you move to another page. If detected, the error question appears at the top of the page. You cannot proceed until you satisfy the question. Some examples of errors follow:

A. “Daily Support Time” and the “Type of Support” cannot be zero if the “Frequency” for any item is greater than zero.
B. Either all or none of the three choices (“Daily Support Time”, “Type of Support”, or “Frequency”) need to have responses.
C. An item response entered into the text box needs to match one of the choices.

Adding, editing, or deleting narrative notes

Your notes are useful for setting up an Individualized Support Plan or person-centered plan. For example, making an informal notation that “an aunt who lives next door is available to help with mealtimes,” will help the planning team. Notes are documented in the SIS final reports used in the planning process. There are many areas to add narrative notes:

A. **Item-specific notes:** You can add an item-specific note by clicking the + sign in front of each item. In the window that appears, flag the item as to whether it is important “to” or “for” the individual if you wish. A box appears in which to add the note. After you add the note, you may leave the window open. Notes can be updated or deleted later if needed. The indicators show up on the record that an item is important To, For and if a Note was added on the right side panel.



B. **Section notes:** This is for notes that are not specific to an item but are more general to the type of activities listed on that page. Such notes can be entered at the bottom of each page and are helpful for planning purposes.

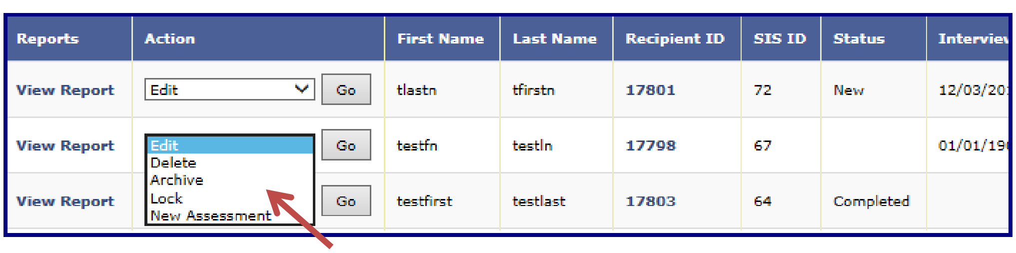
C. **Interviewer Summary Notes:** Can be entered at the bottom of the profile page.

Locating an unfinished record

A record may be left to be finished at another time. For example if a telephone number is missing or some information of that type that is required. Search for the record by clicking on the headers. When you see the record select edit to open and complete it.

Editing Records using the Search Page Action Bar

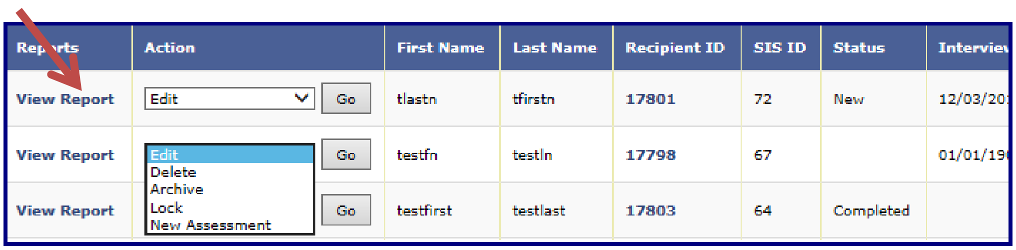
In the search window locate the assessment record, click on Edit and select Go. This will open the record for editing. If you have the permission, this action bar will soon allow you to change the status of an assessment from New or In Progress to Archived.



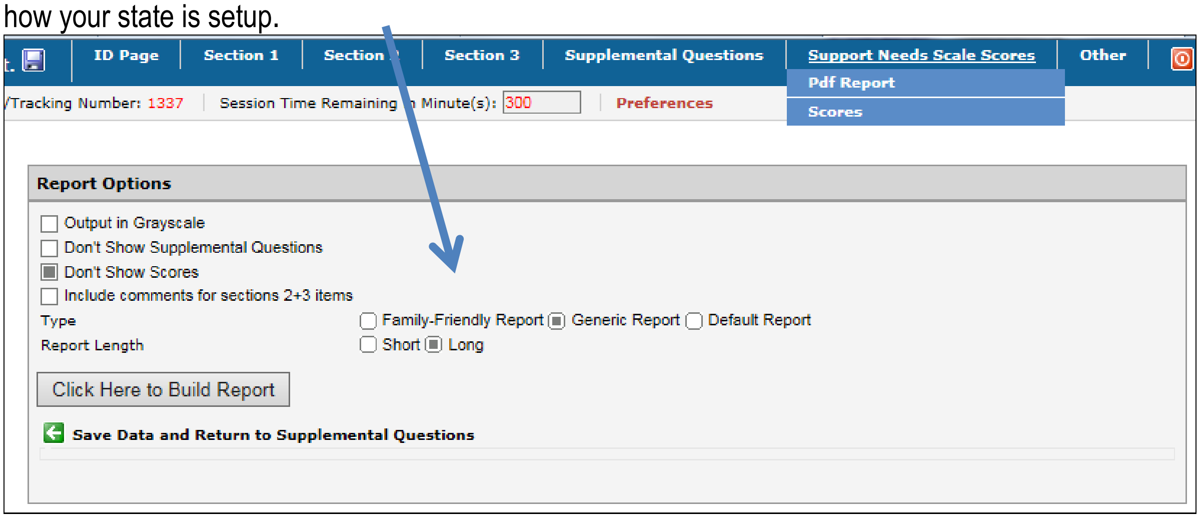
6. Accessing Reports

A report is available after you complete and validate an assessment record. The report is automatically scored and generated from the assessment data. From the SISOnline search page, you will select view report. The report is available as a Family Friendly reports and can be printed with various optins and in grayscale if you have a black and white printer. There are two ways to access report. If you are in a record you can get to reports from the blue menu at the top of the page.

If you are on the search page, the link to "View Report" can be clicked to get to a report.



The format of the report will be a standard Family Friendly report or might have variations, depending on how your state is setup.



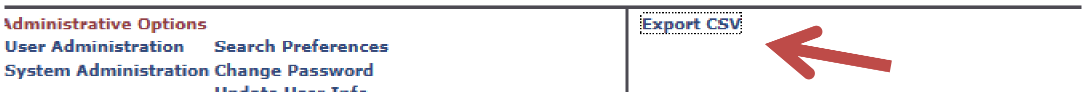
Options are provided for such things as grayscale or with/without supplemental questions or scores.

Reports from Migrated Assessments

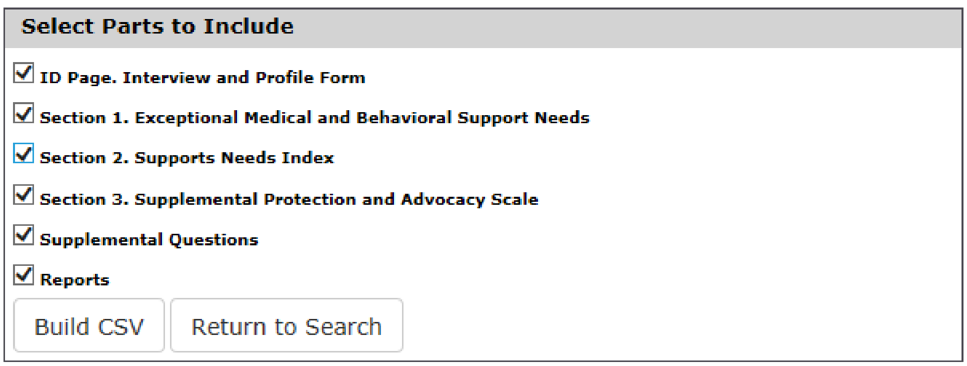
Users will be able to create PDF reports from migrated assessments (as long as they were "completed" in the old system). However, if users edit those migrated assessments in the new system, the assessment will be validated using the SIS-A rules, and require responses for items 16, 17, or 18 in section 1A (likely changing the status to "in progress".) Then they will have to enter responses for items 16, 17, or 18 in section 1A before they can be marked "completed" again and generate a report.

CSV Bulk Report

To export bulk data for various admin reports, click on Export CSV, found on the search page, at the top of the Administrative Options, You will then select SIS-A or SIS-C and Export CSV.



You can select what type of data you want to export. Click all or just one and then “Build CSV”. The report opens in an Excel Spreadsheet. Before running a second report, save the first one and close it, then run another.



7. Getting Help

This user guide is your first line of help. Your supervisor is also an avenue for help. The SISOnline help desk is available too, so please know you have resources for help if you have an issue or question.

SISOnline Help Desk

For assistance with passwords, website access, and technical support, you can contact us using the following information: email help@sis-online.org or, call **202.387.1968 Ext. 211**
(M–F 9am–5pm Eastern).

Help Documents on SISOnline

If you click on the “Help” icon in SISOnline you can access documents that interviewers and administrators find helpful.

- SISOnline Technical User Guide (tips for using SISOnline)
- Interviewing Guidelines -
- SIS-A Frequently Asked Questions
- Guidelines for Interviewing People with Disabilities

Part 2. SIS Venture

Venture is the data entry module for SISOnline that allows you to enter your SISOnline interview ratings anywhere and without accessing the Internet. Interview data is entered directly into Venture and then uploaded to SISOnline. Venture can be used with either SIS-A or SIS-C.

Tips to get started:

- Be online for the **first** login to SIS Venture so it "synchs" with SISOnline.
- Minimize all the other programs that are running so you can see the desktop.
- Double-click the SIS Venture icon to open it to the login window. Enter your SIS Online User Name and Password (same credentials as for SISOnline).
- Log off and reopen the software while offline, this time using your login information given to you.

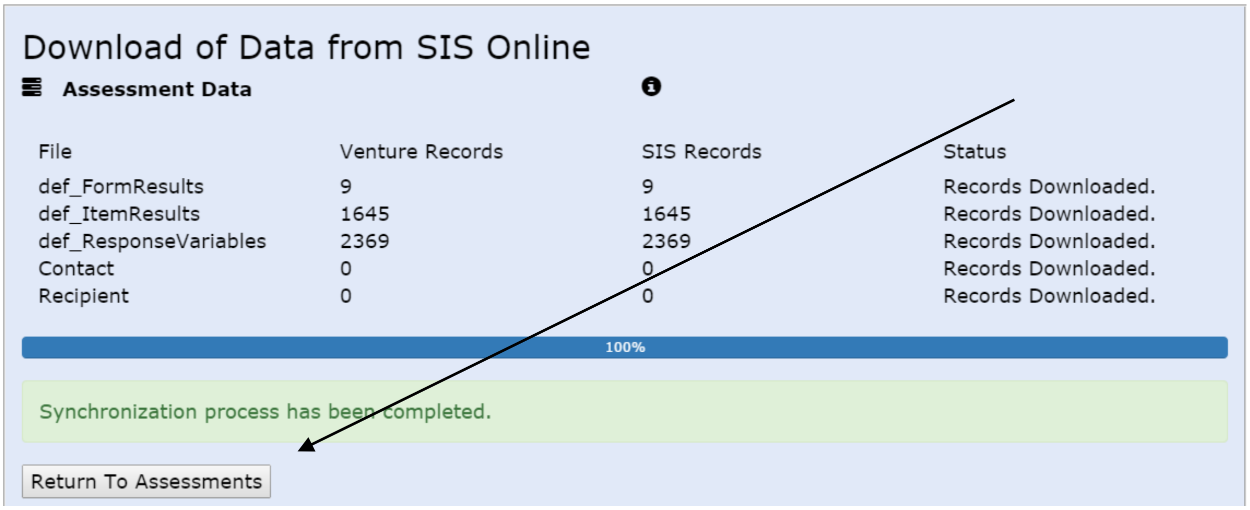
Using Venture

After login, Venture opens to the screen shown below.. While working in Venture, use the Venture Options menu at the top of the page. Each time you logon, the system is going to download assessments.

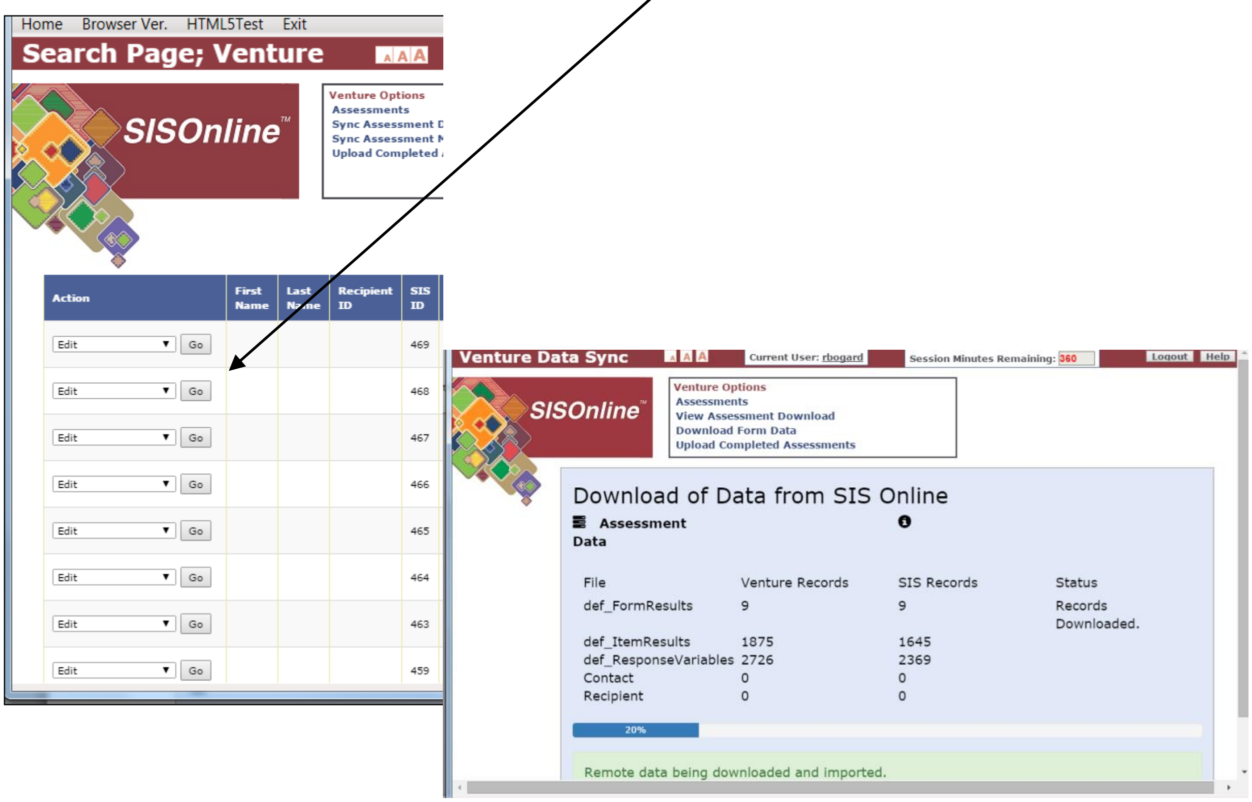
Warning:

Until you start entering data on the supports ratings pages, the profile pages will continue to be updated with the SISOnline data on the server, each time you login. So it is best not to edit the profile pages of the assessment until you start entering assessment data on the assessment data entry pages.

1. When data is downloaded, click return to assessments as shown on the next page.



Wen assessments are downloaded, the Venture search page looks like the SIS-A search page. Select the assessment you want to work on (edit) mode. **When complete close the record by returning to search**.

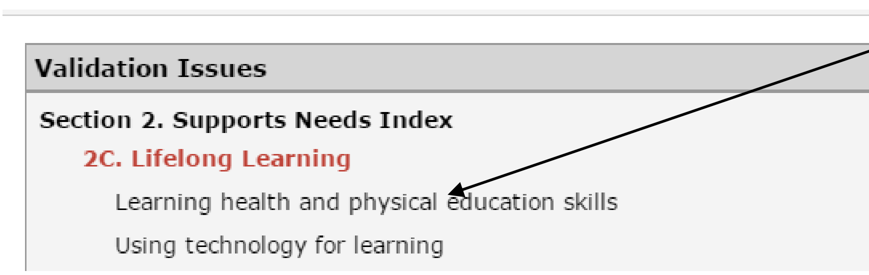


You can adjust the size of the font by clicking on the sizing links. When working in Venture, wait for the spinning wheel to finish before you enter data or move to another page.

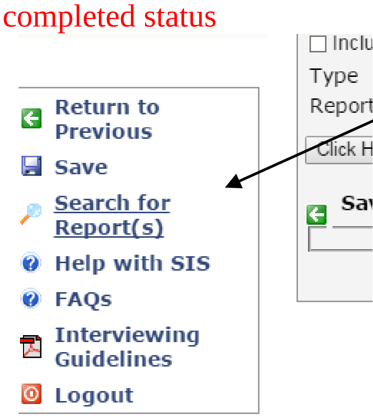
Uploading Completed Assessments

Validation

To validate your record (make sure it is complete) go to the report menu and click on the validation link. When the validation check is done, you will see what questions still need to be completed before you can upload. Remember that a record must be in complete status to upload. To correct the validation issue(s), return to those sections and complete the items:



When these are fixed go back to the search page where you will see your record now has completed status



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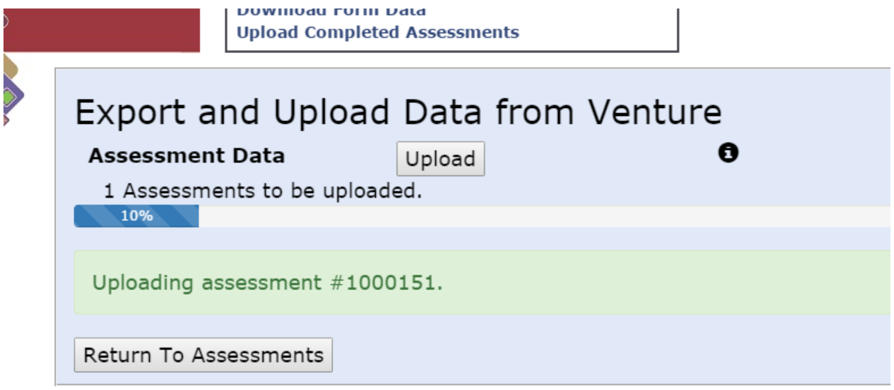
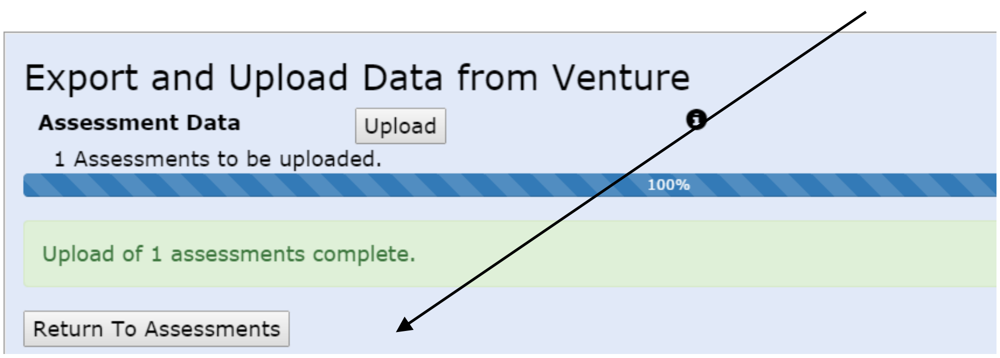
You must be online to upload a record. Uploading a record is a 2-step process and – The record must have a completed status—be sure to check this by selecting Validation in the reports menu.
When the record is complete then:

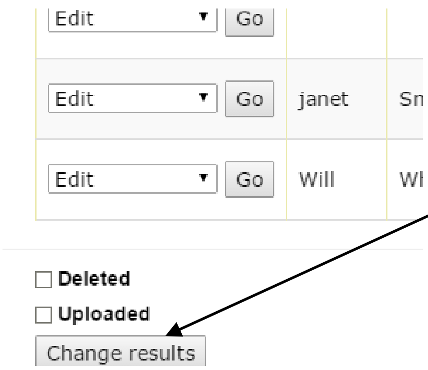
1. Select "Upload" from the Venture Options Menu, **or** use the upload in the Action menu;
2. Then select upload, the screen changes to "uploading assessment" and gives the sis_id number for the record that is being uploaded



When the record has been uploaded, click "Return to Assessments" to work on another sis or to check that your record has been uploaded to SISOnline.



To check that a record that has been uploaded go to the bottom of the search page and click "uploaded" and "Results" The search page will provide the completed and archived record.



You can edit and save any changes in the archived report. The data actually remains in Venture a 'number of days before physical delete' configuration parameter for each state.

Synch Form Data

Synch Form Data takes you to a page where you can synch the form data (the items on the form, the sections, parts, any data required to display the form, basically). This is useful in case there are changes made to a form and the user needs these changes in Venture.

Version, Questions-

Note: The current Venture version will run on laptops with Windows 7 or 8. It will not run on iPad (iOS) or Android tablets. It may run on the Windows Surface tablets, but we have not yet tested it on that platform.

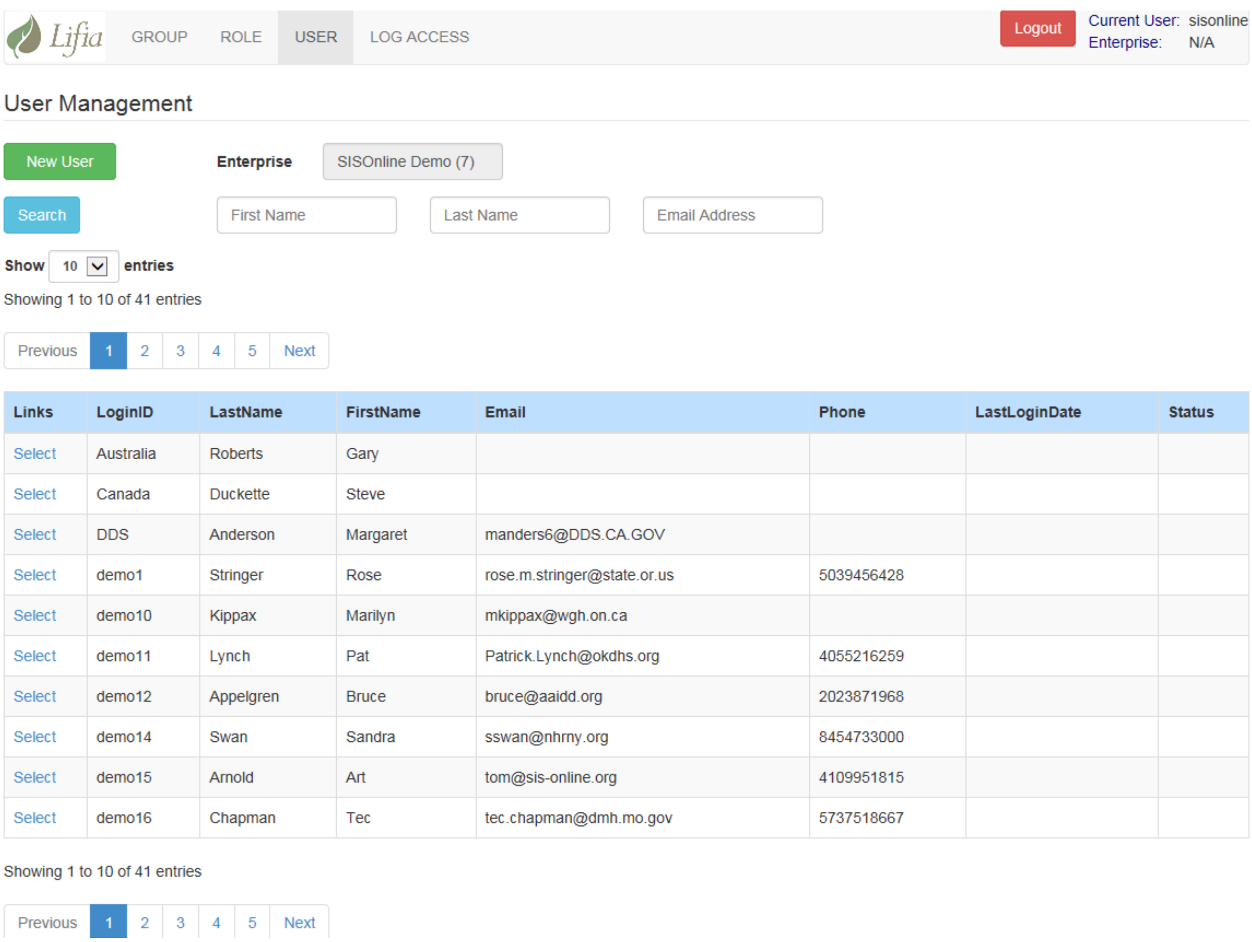
Part 3. The UAS (User Admin System)

User Administration System

The User Administration System (UAS) is setup to create new users and support users with password changes. Typically, only a few people in any enterprise will have access to the UAS. If you have been given that access, this part of the user guide will help you learn how to manage the administrative options for your enterprise. The UAS supports both SIS-A and SIS-C users the same way—there is no distinction.

UAS – Enterprise Management Page

When you first login to the user admin module, the page you "land" on is the Enterprise Management page. That is the page for your State or Region. You will use this page in the UAS the most. From here, you can click on users to setup new accounts or change passwords. Typically the roles, groups will have been pre-determined by your SISOnline managers—and will be setup for you already..



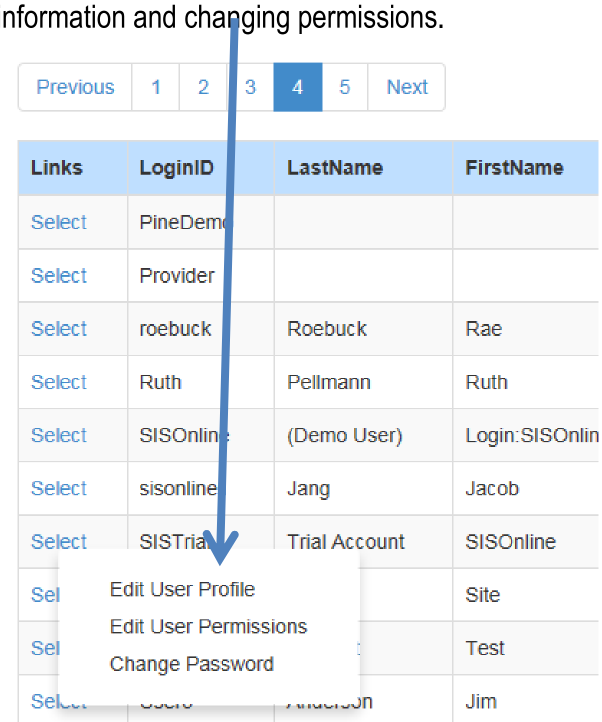
Links	LoginID	LastName	FirstName	Email	Phone	LastLoginDate	Status
Select	Australia	Roberts	Gary				
Select	Canada	Duckette	Steve				
Select	DDS	Anderson	Margaret	manders6@DDS.CA.GOV			
Select	demo1	Stringer	Rose	rose.m.stringer@state.or.us	5039456428		
Select	demo10	Kippax	Marilyn	mkippax@wgh.on.ca			
Select	demo11	Lynch	Pat	Patrick.Lynch@okdhs.org	4055216259		
Select	demo12	Appelgren	Bruce	bruce@aaidd.org	2023871968		
Select	demo14	Swan	Sandra	sswan@nhrny.org	8454733000		
Select	demo15	Arnold	Art	tom@sis-online.org	4109951815		
Select	demo16	Chapman	Tec	tec.chapman@dmh.mo.gov	5737518667		

Showing 1 to 10 of 41 entries

Previous 1 2 3 4 5 Next

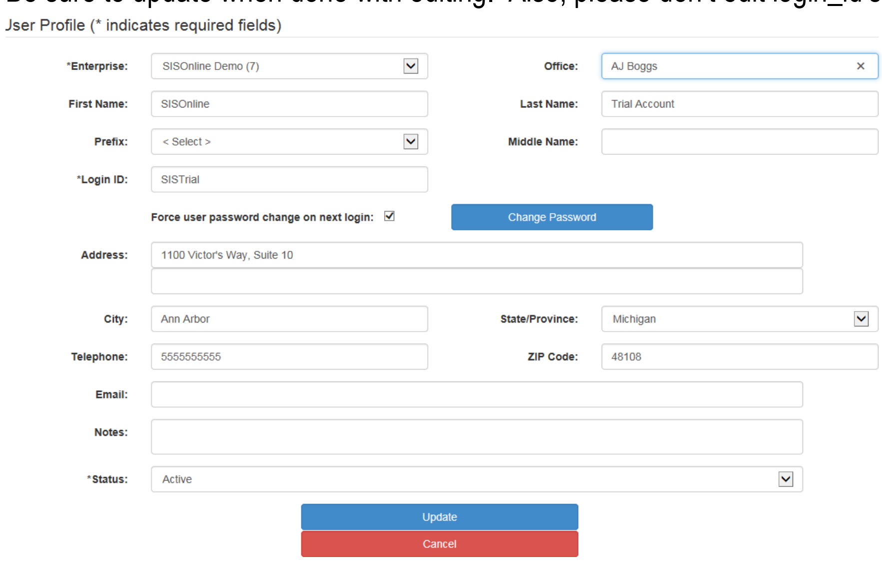
1. Updating Existing Users

Click on an existing username and you see the options for changing passwords, updating profile information and changing permissions.

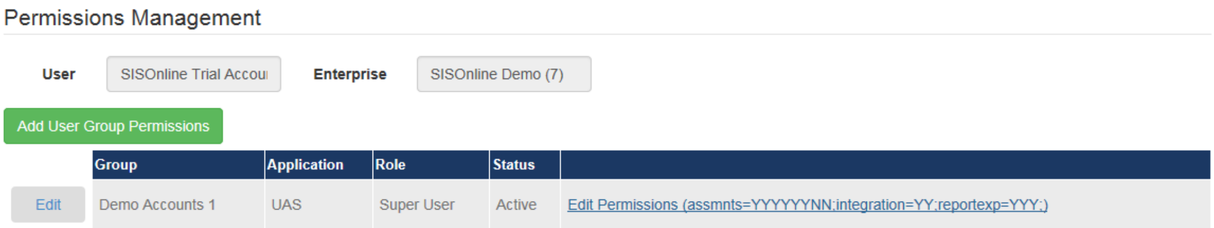


A. Edit User Profile

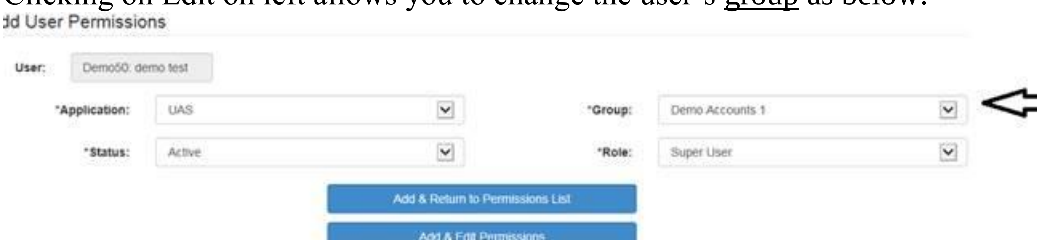
Be sure to update when done with editing. Also, please don't edit login_id's.



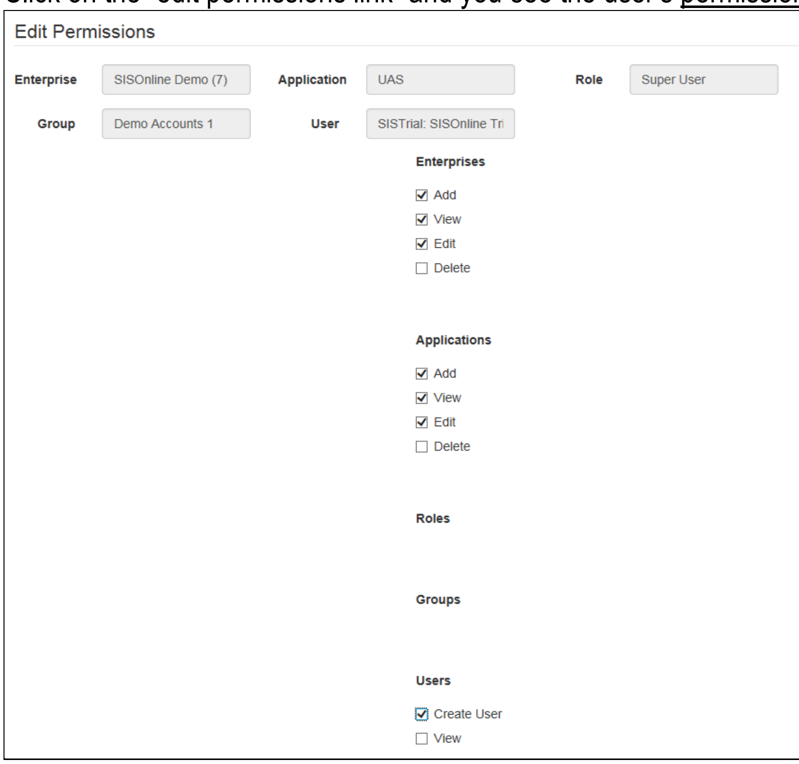
B. Edit User Permissions and Group



Clicking on Edit on left allows you to change the user's <u>group</u> as below:

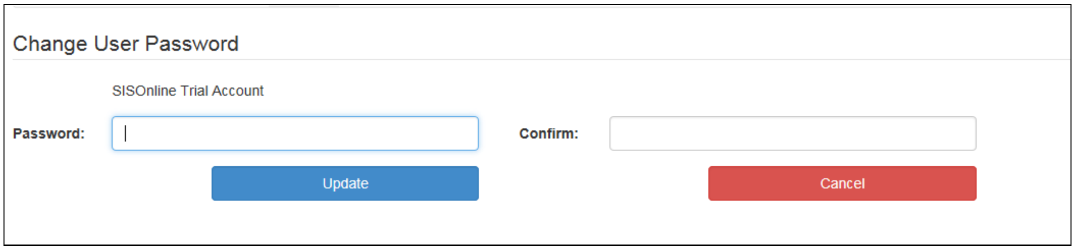


Click on the "edit permissions link" and you see the user's <u>permissions</u> and then can update them.



C. Change Password

When you click on change password, the page below opens. Insert and confirm the new password and click update.

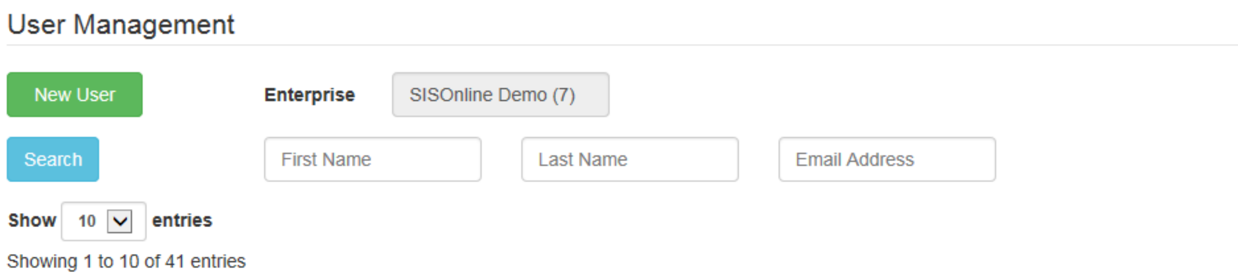


2. Creating New User Accounts

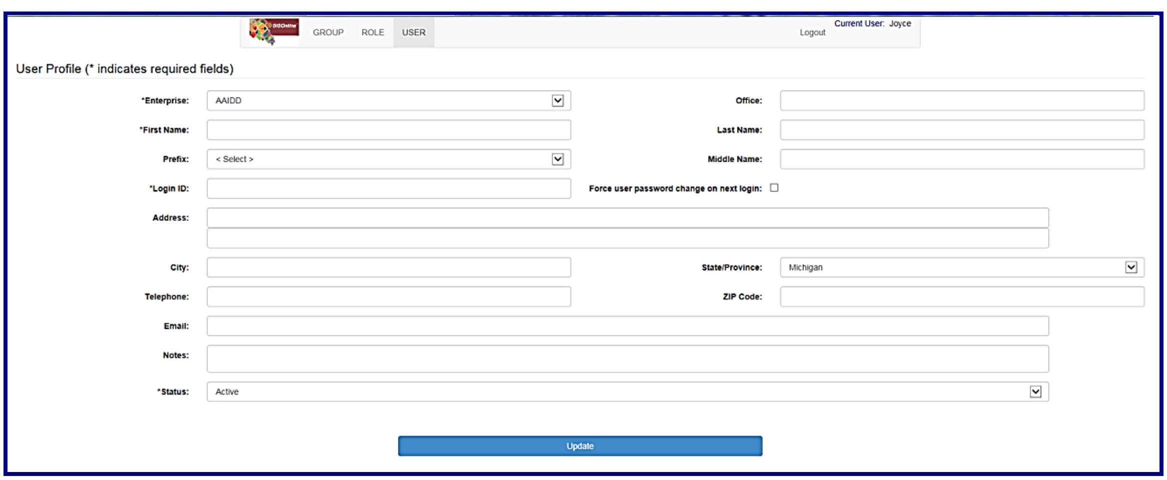
Go to the user management page to create a new user. Here is a summary of how it's done.

A. The New User button.

Clicking will I open a profile page.



B. User Profile Page



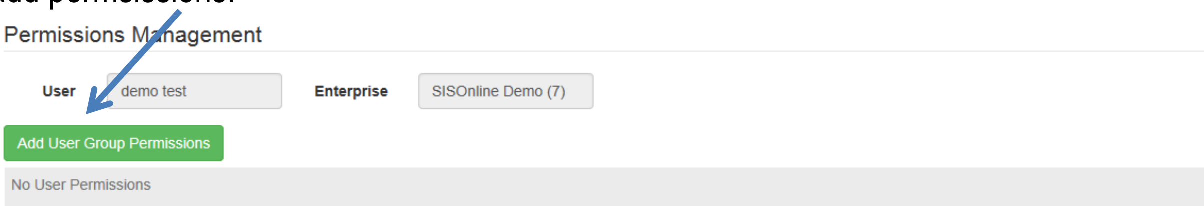
Fill in the blanks!

- Required fields are at the top of the user account screen identified by a red *.

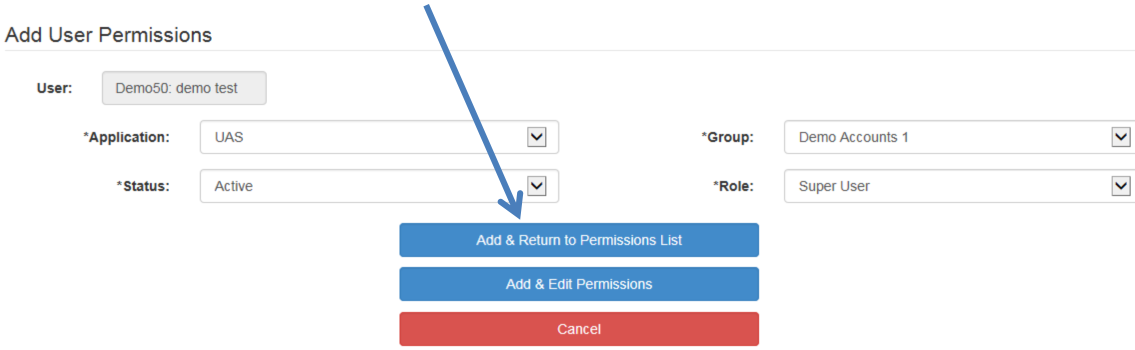
- When you create a new account, the username is initially blank and then editable until you select save. Thereafter, when you open the account the username is “read only”. User names are tied to records and that is why they are not editable.
- When creating a new user record, the enterprise defaults to the users’ enterprise and is read only, unless the users is has “Application Wide” permission, then it is an active pulldown
- Force password change on login will assure that users are forced to enter a new password.
- Office: This is a customizable label (e.g. Office, Region, District, PIHP, LME, etc.) it is setup by your Enterprise configuration with a pre-selected pulldown list of choices.
- A notes box is available for admin use.
- Make sure the user is in Active status.
- When adding a new user, a record will not be created if: 1) user name is already used by another user or 2) any required fields are blank. An error message will appear if this is the case.
- When complete click the update button and you are back to the user management grid.

C. Complete the User Account Setup

1. Click on the new user name, and select permissions. When you are setting up a new user, there will be no permissions or role selected. So you will see this page. Select add permsissions:



For a new user, the following screen opens. Select the role (and group is needed). Then select either of the blue “add” selections.



If the user has standard permissions for the role you won’t need to do anything else—so click on the first selection. If the user needs an additional permission or you need to remove one, you can click on the second selection.

Use this screen to change:

1. Status. A new account is active, when an assessor leaves, you can inactivate the user account here.
2. Group. Select the correct group within the enterprise from the pulldown menu:

The permissions list

- ✓ **View:** Users should have this to create records.
- ✓ **Create:** Can create an assessment record.
- ✓ **Delete:** Can delete an assessment record.
- ✓ **Archive:** Allows user to archive recipient records for noncurrent users.
- ✓ **Move:** allows the user to reassign an assessment records to another user.
- ✓ **Unlock:** allows a user to unlock a record.
- ✓ **Assign Only:** can assign a record to a user.
- ✓ **Enterprise Wide Access**: allows the user to manage the users across their enterprise.
- ✓ **Venture:** give the user access to Venture
- ✓ **FF Report:** access to the family friendly assessment report.
- ✓ **Generic Report**: access to the generic assessment report.
- ✓ **Exports:** access to admin reports.

When you are done, click on update. Your user account is complete!

Links Between SIS-A or SIS-C and the User Admin Module

There is a link at the top of the SIS-A search page to the UAS module. However, there is not a link back as the user admin module opens in a new window. The user will need to use the tabs at the top of the page to return to SIS-A (shown below).