



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

*Developed By*



American Association on Intellectual and Developmental Disabilities (AAIDD)  
501 Third Street, NW, Suite 200  
Washington DC 20001  
[www.aaid.org](http://www.aaid.org)

*And*



A.J. Boggs & Company  
4660 S. Hagadorn Road, Suite 290  
East Lansing, Michigan 48823  
[www.ajboggs.com](http://www.ajboggs.com)

*Last revised 9/28/2015 SISOnline*

## Contents

Part 1. Getting Started with SISOnline.....	4
1. Basic Steps for Using SISOnline (SIS-A or SIS-C).....	4
<i>Best Practices in Selecting and Securing Your Password</i> .....	5
2. The SISOnline Search Page.....	5
Search Options (Top Section of Search Page).....	5
The Top Blue Header .....	6
Task Options in the Assessment Grid .....	6
<i>Advanced Search Options (Bottom Section of Search Page)</i> .....	8
3. Navigation Icons .....	8
<i>The Side Panel</i> .....	9
<i>The Menu Bar</i> .....	9
User Preferences .....	10
Saving Assessment Data .....	10
4. The Assessment Record Information.....	10
Assessment Record Status .....	10
Assigning Records .....	11
Transfer Profile Information to Records .....	11
5. Using the Assessment Record.....	12
Clarification of questions (Tool Tips) .....	13
Adding, editing, or deleting narrative notes .....	13
<i>Editing Records using the Search Page Action Bar</i> .....	14
6. Accessing Reports.....	15
Reports from Migrated Assessments .....	15
CSV Bulk Report.....	16
7. Getting Help.....	16
SISOnline Help Desk.....	16
Help Documents on SISOnline .....	16
Part 2. SIS Venture.....	17
Tips to get started: .....	17
Using Venture.....	17
Uploading Completed Assessments.....	19
Synch Form Data .....	21

# SISOnline User Guide

Part 3. The UAS .....	23
(User Admin System ).....	23
UAS – Enterprise Management Page .....	23
1. Updating Existing Users .....	24
A. Edit User Profile .....	24
B. Edit User Permissions and Group .....	25
C. Change Password.....	25
2. Creating New User Accounts .....	26
A. The New User button.....	26
B. User Profile Page.....	26
C. Complete the User Account Setup .....	27
The permissions list.....	28
Links Between SIS-A or SIS-C and the User Admin Module .....	28

## 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.



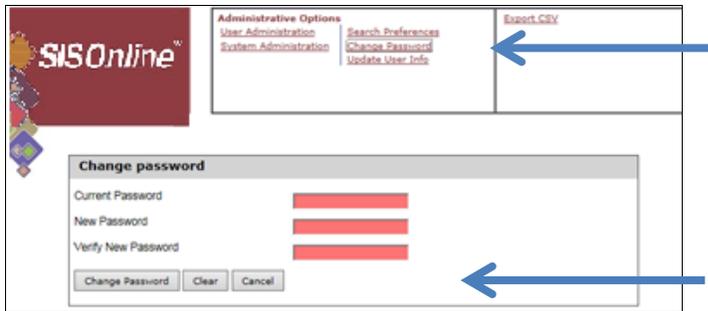
#### Login to SISOnline

- 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 (3<sup>rd</sup> 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](mailto:help@sis-online.org). Login credentials are case sensitive.

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

# SISOnline User Guide



## [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.

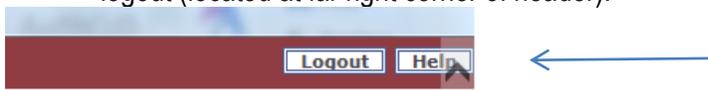
## 2. The SISOnline Search Page

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).



If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

# SISOnline User Guide

- 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.

## The Top Blue Header

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.

## Task Options in the Assessment Grid

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

### 1. Action Bar

- 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.
- 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.
- 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.
- 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.
- 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.

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

## SISOnline User Guide

### 2. Reports Column:

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

### 3. Create New Assessment Record

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**

Search Assessments Clear Search Criteria

First Name:  Last Name:

Search for multiple records by inserting the SIS\_id's or tracking numbers or ssn's by entering numbers in a single column

SIS IDs	Recipient IDs	Tracking Numbers
<input type="text"/>	<input type="text"/>	<input type="text"/>

Interviewer Username: rbogard, lisa.kelly, Joyce, MiAdmin

Groups: Ingham

Enterprise:

Interview Date Range:

From:  To:

Last Month, Last Quarter, Year to Date, Last Year, End of Next Month, End of Quarter, End of Next Quarter, End of Year, End of Next Year

SIS Version:  Adult  Child

Level of Completion:  Completed,  New,  In Progress,  Abandoned

Typically Hidden Records:  Deleted,  Archived,  Training

Other:  Inactive Recipient Records,  All Assessments for Each Recipient

Search Assessments Clear Search Criteria

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.

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

## SISOnline User Guide

- 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

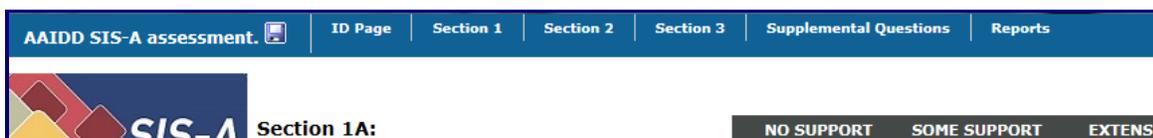
The box below will appear when you are working on any page in the record. The icons are as follows: the  icon moves you to the next page. Click on **Save** if you stop an assessment for discussion during the interview or if you stop in the midst of editing. Click the  (magnifying glass icon) to return 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.)

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

## SISOnline User Guide

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.

### Partially Completed Assessment Records

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.

### Assigning Records

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.

### Transfer Profile Information to Records

The information you enter in your profile will transfer onto each assessment record you create later in either Venture or SISOnline . See the screenshot below to change or update this information.

**SOnline™**

**Administrative Options**  
User Administration   Search Preferences  
System Administration   Change Password  
Update User Info

Click on "Update User Information" on the search page --in the top menu-- select link and the menu box opens so that you can update your contact information. If you need to change your password, click on that link.

**Update Profile**

First Name	<input type="text" value="Rich"/>	Middle name	<input type="text"/>
Last Name	<input type="text" value="Bogard"/>	Email	<input type="text" value="rbogard@ajboggs.com"/>
Phone Number	<input type="text" value="517-253-0053"/>	Extension	<input type="text" value="125"/>
Position	<input type="text"/>	Organization	<input type="text" value="AJB EL"/>
Address	<input type="text" value="4660 South Hagadorn Rd"/>	City	<input type="text" value="East Lansing"/>
State/Province	<input type="text" value="MI"/>	Zip/Postal Code	<input type="text" value="48823"/>

Don't send me AAIDD information.

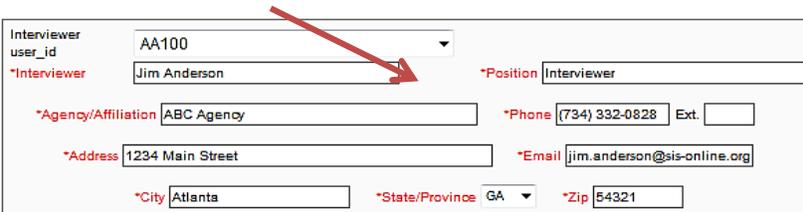
If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

# SISOnline User Guide

## 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.

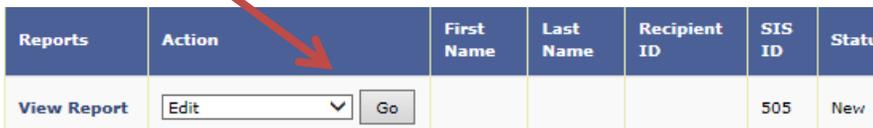


The screenshot shows a form for entering interviewer information. The fields are as follows:

- Interviewer user\_id: AA100 (dropdown menu, highlighted with a red arrow)
- \*Interviewer: Jim Anderson
- \*Position: Interviewer
- \*Agency/Affiliation: ABC Agency
- \*Phone: (734) 332-0828 Ext. [ ]
- \*Address: 1234 Main Street
- \*Email: jim.anderson@sis-online.org
- \*City: Atlanta
- \*State/Province: GA
- \*Zip: 54321

- 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".



Reports	Action	First Name	Last Name	Recipient ID	SIS ID	Status
View Report	Edit [dropdown] Go				505	New

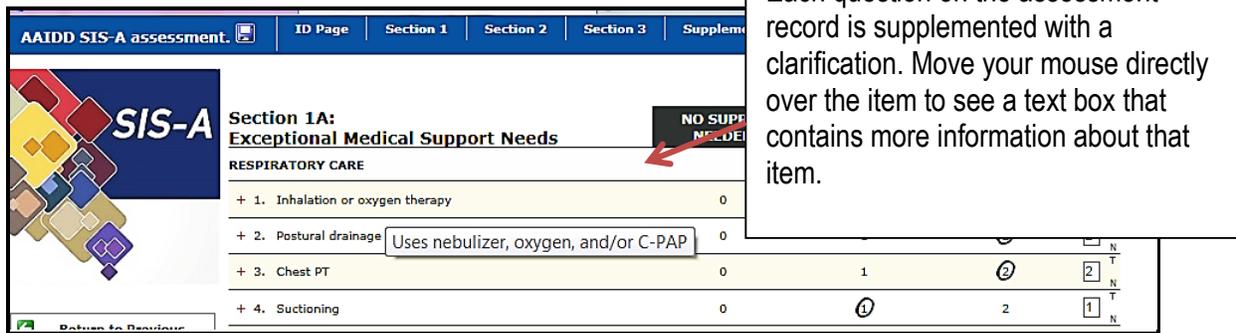
## 5. Using the Assessment Record

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

## SISOnline User Guide

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)



The screenshot shows the SIS-A assessment interface. At the top, there are navigation tabs: "ID Page", "Section 1", "Section 2", "Section 3", and "Supplemental". The main content area is titled "Section 1A: Exceptional Medical Support Needs" and "RESPIRATORY CARE". A table lists four items:

Item	Description	Rating	Frequency	Type of Support	Daily Support Time
1.	Inhalation or oxygen therapy	0			
2.	Postural drainage	0	Uses nebulizer, oxygen, and/or C-PAP		
3.	Chest PT	0	1	2	
4.	Suctioning	0	1	2	

A tooltip box is overlaid on item 2, containing the text: "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." A red arrow points from the tooltip to item 2 in the table.

### 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:

- “Daily Support Time” and the “Type of Support” cannot be zero if the “Frequency” for any item is greater than zero.
- Either all or none of the three choices (“Daily Support Time”, “Type of Support”, or “Frequency”) need to have responses.
- 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:

- 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.

# SISOnline User Guide

## 2A. Home Living

	Type of Support	Frequency	Daily Support Time	
- 1. Operating home appliances/electronics	0 1 2 3 4 0	0 1 2 3 4 0	0 1 2 3 4 0	T F N
<b>Notes</b> <input checked="" type="checkbox"/> Item is Important To the individual <input type="checkbox"/> Item is Important For the individual test of to 2400 characters maximum allowed for notes field. 2197 remain.				
- 2. Bathing and taking care of personal hygiene and grooming needs	0 1 2 3 4 0	0 1 2 3 4 0	0 1 2 3 4 0	F N
<b>Notes</b> <input type="checkbox"/> Item is Important To the individual <input checked="" type="checkbox"/> Item is Important For the individual test for 2400 characters maximum allowed for notes field. 2199 remain.				
- 3. Using the toilet	0 1 2 3 4 0	0 1 2 3 4 0	0 1 2 3 4 0	T F N
<b>Notes</b> <input checked="" type="checkbox"/> Item is Important To the individual <input checked="" type="checkbox"/> Item is Important For the individual test t and f 2400 characters maximum allowed for notes field. 2195 remain.				

- 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.

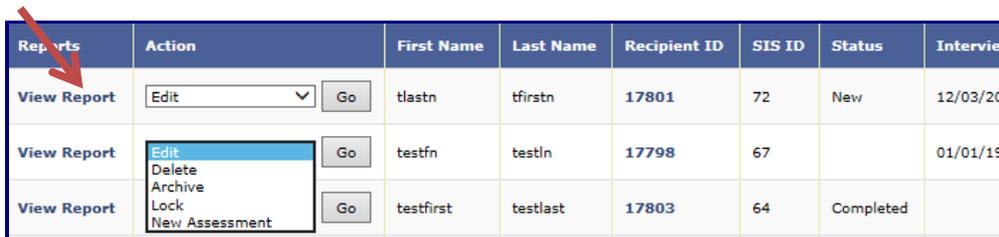
Reports	Action	First Name	Last Name	Recipient ID	SIS ID	Status	Interview
View Report	Edit <input type="button" value="Go"/>	tlastn	tfirstn	17801	72	New	12/03/20
View Report	Edit <input type="button" value="Go"/>	testfn	testln	17798	67		01/01/19
View Report	Edit <input type="button" value="Go"/>	testfirst	testlast	17803	64	Completed	

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am- 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

## 6. Accessing Reports

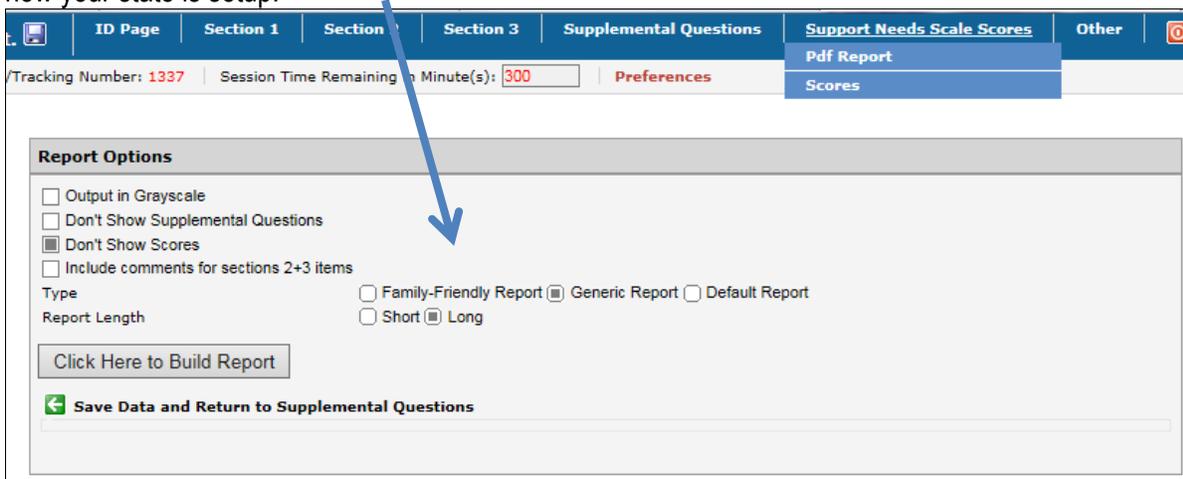
A report is available after you complete and validate an assessment record. The report is automatically scored and generated from the assessment data. From the SISOnline search page, you will select view report. The report is available as a Family Friendly reports and can be printed with various options 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.



Reports	Action	First Name	Last Name	Recipient ID	SIS ID	Status	Interview
View Report	Edit <input type="button" value="Go"/>	tlastn	tfirstn	17801	72	New	12/03/20
View Report	<div style="border: 1px solid black; padding: 2px;">                     Edit                      Delete                      Archive                      Lock                      New Assessment                 </div> <input type="button" value="Go"/>	testfn	testln	17798	67		01/01/19
View Report	<input type="button" value="Go"/>	testfirst	testlast	17803	64	Completed	

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



Output in Grayscale  
 Don't Show Supplemental Questions  
 Don't Show Scores  
 Include comments for sections 2+3 items  
 Type:  Family-Friendly Report  Generic Report  Default Report  
 Report Length:  Short  Long  
  
[Save Data and Return to Supplemental Questions](#)

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.

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

## 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.

**Select Parts to Include**

ID Page, Interview and Profile Form

Section 1. Exceptional Medical and Behavioral Support Needs

Section 2. Supports Needs Index

Section 3. Supplemental Protection and Advocacy Scale

Supplemental Questions

Reports

## 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](mailto: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

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.



## 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:**

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

# SISOnline User Guide

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.

**Download of Data from SIS Online**

**Assessment Data**

File	Venture Records	SIS Records	Status
def_FormResults	9	9	Records Downloaded.
def_ItemResults	1645	1645	Records Downloaded.
def_ResponseVariables	2369	2369	Records Downloaded.
Contact	0	0	Records Downloaded.
Recipient	0	0	Records Downloaded.

100%

Synchronization process has been completed.

[Return To Assessments](#)

When 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.

Home Browser Ver. HTML5Test Exit

**Search Page; Venture**

**SISOnline™**

Venture Options  
Assessments  
Sync Assessment  
Sync Assessment  
Upload Completed.

Action	First Name	Last Name	Recipient ID	SIS ID
Edit				469
Edit				468
Edit				467
Edit				466
Edit				465
Edit				464
Edit				463
Edit				459

**Venture Data Sync**

Current User: rbogard Session Minutes Remaining: 360 Logout Help

**SISOnline™**

Venture Options  
Assessments  
View Assessment Download  
Download Form Data  
Upload Completed Assessments

**Download of Data from SIS Online**

**Assessment Data**

File	Venture Records	SIS Records	Status
def_FormResults	9	9	Records Downloaded.
def_ItemResults	1875	1645	Downloaded.
def_ResponseVariables	2726	2369	
Contact	0	0	
Recipient	0	0	

20%

Remote data being downloaded and imported.

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

# SISOnline User Guide

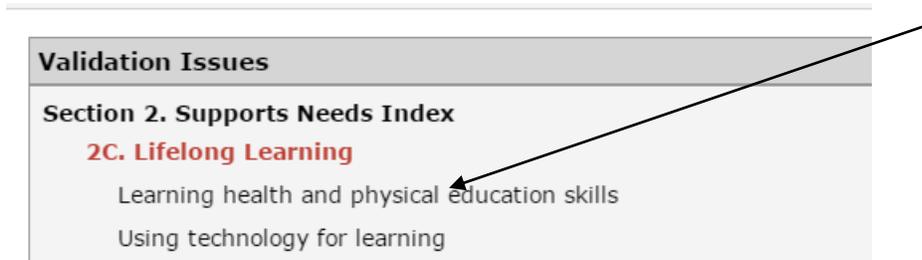
ID Page	Section 1	Section 2	Section 3	Supplemental Questions	Reports
Other		A A A	Current User: <b>rbogard</b>	Viewing ID/Tracking Number: <b>454121</b>	Session Minutes

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.

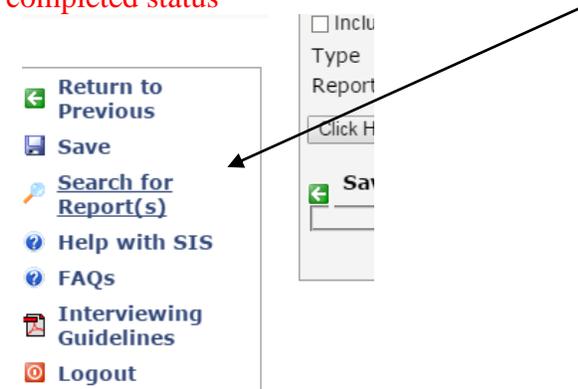
## Uploading Completed Assessments

### 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:



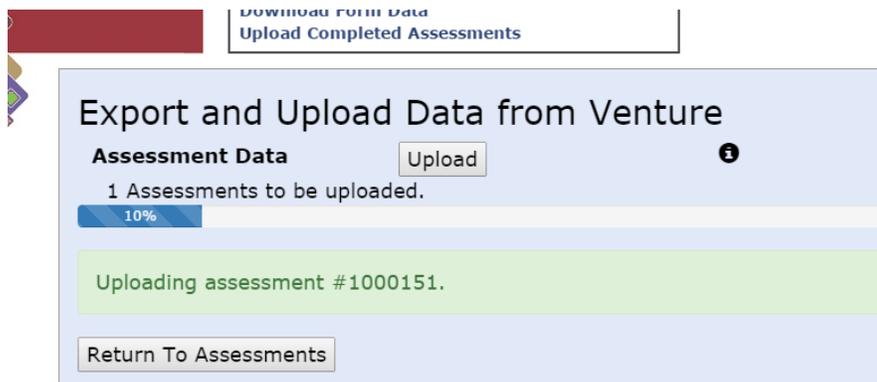
When these are fixed go back to the search page where you will see your record now has **completed status**



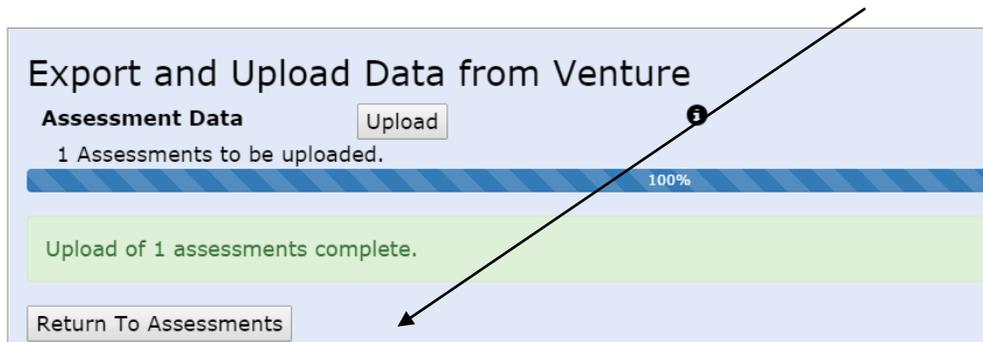
You must be online to upload a record. Uploading a record is a 2-step process and – The record must have a completed status—be sure to check this by selecting Validation in the reports menu.

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.

Edit	Go		
Edit	Go	janet	Sn
Edit	Go	Will	WI

Deleted  
 Uploaded

Action	First Name	Last Name	Recipient ID	SIS ID	Status	Interview Date
<b>Archived</b>						
Edit Edit Delete	Smokey	Bear		1000151	Uploaded	05/05/20

Deleted  
 Uploaded

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.**

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

# SISOnline User Guide

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

## Part 3. The UAS (User Admin System)



User Administration System

Please login

Password

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..

GROUP
ROLE
USER
LOG ACCESS

Logout
Current User: sisonline  
Enterprise: N/A

---

#### User Management

New User
Enterprise
SISOnline Demo (7)

Search

Show 10 entries

Showing 1 to 10 of 41 entries

Previous
1
2
3
4
5
Next

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

Showing 1 to 10 of 41 entries

Previous
1
2
3
4
5
Next

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

## 1. Updating Existing Users

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

Previous 1 2 3 4 5 Next

Links	LoginID	LastName	FirstName
Select	PineDemo		
Select	Provider		
Select	roebuck	Roebuck	Rae
Select	Ruth	Pellmann	Ruth
Select	SISOnline	(Demo User)	Login:SISOnline
Select	sisonline	Jang	Jacob
Select	SISTrial	Trial Account	SISOnline
Select			Site
Select			Test
Select		ANDERSON	Jim

- Edit User Profile
- Edit User Permissions
- Change Password

### A. Edit User Profile

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

User Profile (\* indicates required fields)

*Enterprise:	<input type="text" value="SISOnline Demo (7)"/>	Office:	<input type="text" value="AJ Boggs"/>
First Name:	<input type="text" value="SISOnline"/>	Last Name:	<input type="text" value="Trial Account"/>
Prefix:	<input type="text" value="&lt; Select &gt;"/>	Middle Name:	<input type="text"/>
*Login ID:	<input type="text" value="SISTrial"/>	<input checked="" type="checkbox"/> Force user password change on next login: <input type="button" value="Change Password"/>	
Address:	<input type="text" value="1100 Victor's Way, Suite 10"/>		
City:	<input type="text" value="Ann Arbor"/>	State/Province:	<input type="text" value="Michigan"/>
Telephone:	<input type="text" value="5555555555"/>	ZIP Code:	<input type="text" value="48108"/>
Email:	<input type="text"/>		
Notes:	<input type="text"/>		
*Status:	<input type="text" value="Active"/>		

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

# SISOnline User Guide

## B. Edit User Permissions and Group

### Permissions Management

User: SISOnline Trial Account Enterprise: SISOnline Demo (7)

[Add User Group Permissions](#)

Group	Application	Role	Status		
<a href="#">Edit</a>	Demo Accounts 1	UAS	Super User	Active	<a href="#">Edit Permissions (assmnts=YYYYYYNN:integration=YY:reportexp=YYY.)</a>

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

#### jd User Permissions

User: Demo00: demo test

\*Application: UAS \*Group: Demo Accounts 1 

\*Status: Active \*Role: Super User

[Add & Return to Permissions List](#)  
[Add & Edit Permissions](#)

Click on the “edit permissions link” and you see the user's permissions and then can update them.

**Edit Permissions**

Enterprise: SISOnline Demo (7) Application: UAS Role: Super User

Group: Demo Accounts 1 User: SISTrial: SISOnline Tr

**Enterprises**

- Add
- View
- Edit
- Delete

**Applications**

- Add
- View
- Edit
- Delete

**Roles**

**Groups**

**Users**

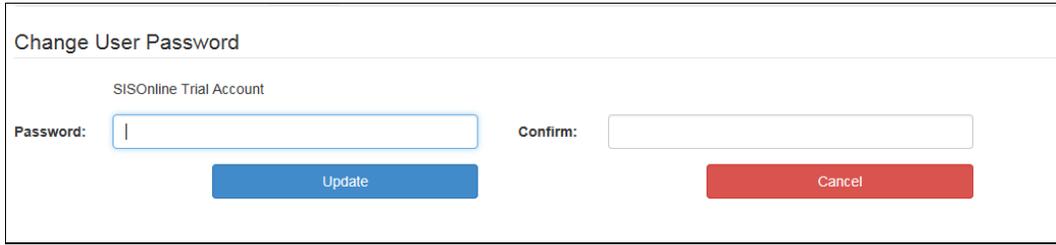
- Create User
- View

## C. Change Password

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

If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

# SISOnline User Guide



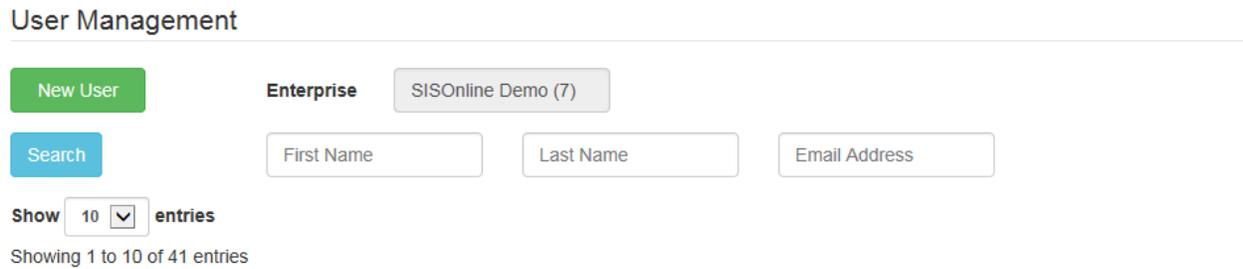
The image shows a 'Change User Password' form. At the top, it says 'SISOnline Trial Account'. Below that, there are two input fields: 'Password:' and 'Confirm:'. The 'Password:' field has a cursor in it. Below the 'Password:' field is a blue 'Update' button. Below the 'Confirm:' field is a red 'Cancel' button.

## 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.

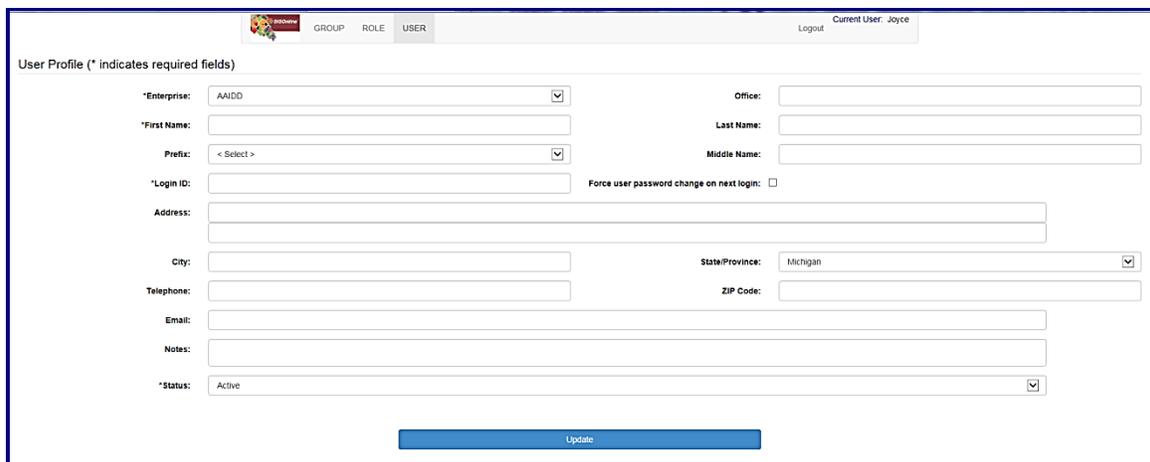
### A. The New User button.

Clicking will open a profile page.



The image shows the 'User Management' page. At the top left is a green 'New User' button. To its right are 'Enterprise' and 'SISOnline Demo (7)' buttons. Below these is a 'Search' button and three input fields for 'First Name', 'Last Name', and 'Email Address'. Below the search fields is a 'Show 10 entries' dropdown menu and the text 'Showing 1 to 10 of 41 entries'.

### B. User Profile Page



The image shows the 'User Profile' page. At the top, there are tabs for 'GROUP', 'ROLE', and 'USER', with 'USER' selected. The page title is 'User Profile (\* indicates required fields)'. Below the title are several input fields: '\*Enterprise:' (dropdown), 'Office:' (text), '\*First Name:' (text), 'Last Name:' (text), 'Prefix:' (dropdown), 'Middle Name:' (text), '\*Login ID:' (text), and a checkbox for 'Force user password change on next login:'. Below these are 'Address:' (text), 'City:' (text), 'State/Province:' (dropdown), 'Telephone:' (text), and 'ZIP Code:' (text). Below these are 'Email:' (text), 'Notes:' (text), and '\*Status:' (dropdown). At the bottom is a blue 'Update' button.

#### Fill in the blanks!

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

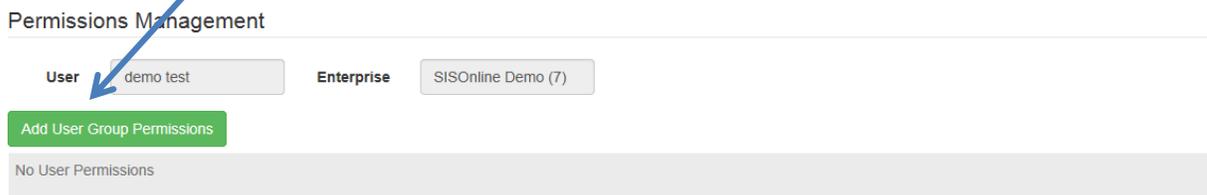
If you have questions while using SISOnline or Venture, contact the **SISOnline Help Desk**, Monday - Friday, 9am– 5pm. (Eastern) at [help@sis-online.org](mailto:help@sis-online.org) or 202-387-1968 ext.211.

## SISOnline User Guide

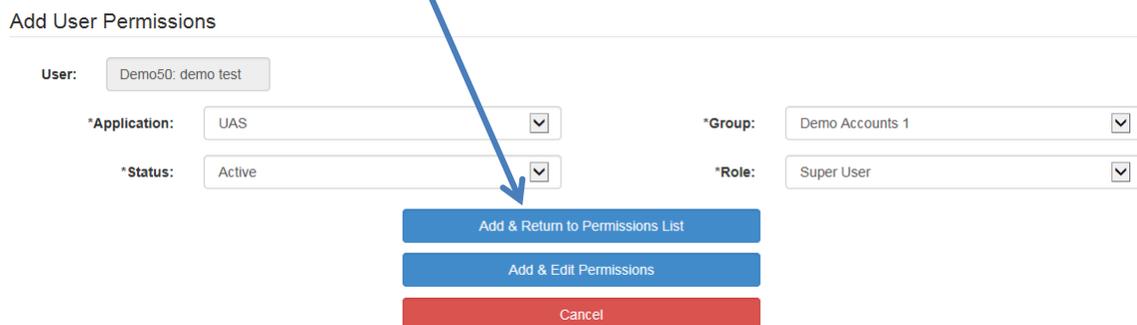
- When you create a new account, the username is initially blank and then editable until you select save. Thereafter, when you open the account the username is “read only”. User names are tied to records and that is why they are not editable.
- When creating a new user record, the enterprise defaults 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 permissions:



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.*

## SISOnline User Guide

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:

Group: 

### 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).

