User Instructions for the CAREAssist Eligibility Verification Report

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1. INTRODUCTION

These instructions provide guidance on the usage of the CAREAssist Eligibility Verification Report.

The CAREAssist Eligibility Verification Report is a web application that the Oregon Health Authority, CAREAssist Program (Oregon's AIDS Drug Assistance Program) provides for its Community Partners to verify program eligibility for Ryan White Program case management and support services. Access to client information through this application is therefore limited to authorized personnel only. Users who have verified their email identity to the CAREAssist Program will be provided access privileges to view Client information for their assigned Domain and/or Role.

For questions about this document or other aspects of the CAREAssist Eligibility Verification Report, contact Kris Harvey at 971-673-0143 or at kris.a.harvey@state.or.us

2. APPLICATION USERS AND ROLES

The CAREAssist Eligibility Verification Report associates you, as a User, with one or more Roles, which determine what access privileges you will have been granted within the application. Your User Account must be associated with a unique email address that serves as your identity within the system. The CAREAssist Program Office must have the email address that you are using on file in order to approve your access to the application.

Each group of User functions has been assigned a different Role with the application. Furthermore, each Role can only be assigned to Users that have been associated with certain Domain groups. If applicable, Users can be assigned multiple Roles, but these Roles cannot conflict with the security requirements of the Domain groups.

User Roles are assigned by an Admin. Table 1. lists the Roles, the Domain groups, and User functions associated with each.

Table 1. Application Roles, Associated Domain Groups, and Functions

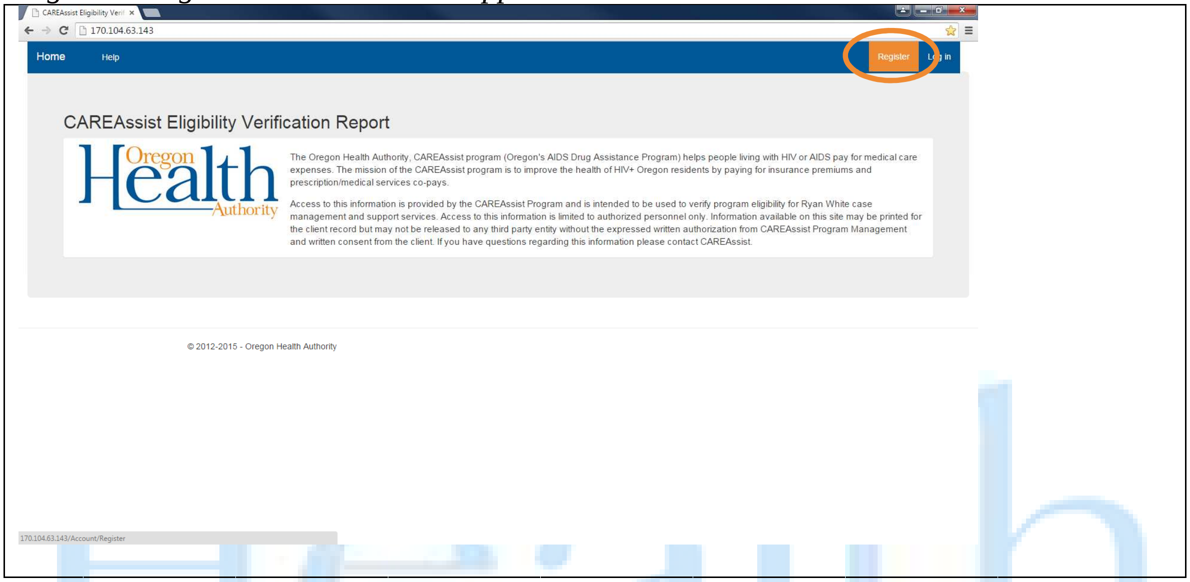
Role	Domain Groups	User Functions
Admin	All internally-based OHA Domains	Assigns Users to Roles, confirms/disables access privileges for Users
SuperUser	All internally-based OHA Domains	View Client Lists and Detailed Information of clients associated with all Domains.
Community Provider	All Community Partner Domains	View Client Lists and Detailed Information of clients associated with User’s Domain only.

3. OBTAINING AND CONFIRMING A USER ACCOUNT

The CAREAssist Eligibility Verification Report allows you to self-register for a User account and to maintain your account information.

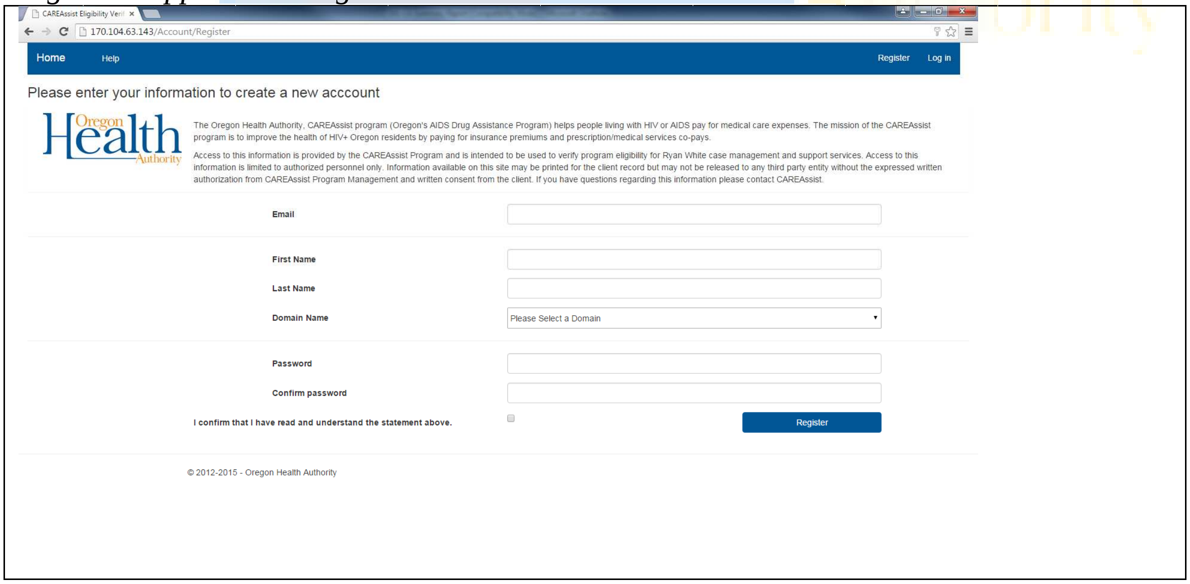
To create a new User account, click on the word "Register" in the navigation bar on the application's home page, which is shown in Figure 1.

Figure 1. Registration Link on the Application Home Screen



The registration form will be presented, which is shown in Figure 2.

Figure 2. Application Registration Form



Proceed to enter your information into the registration form. Be sure to select the appropriate Domain Name from the drop-down list. This determines what Roles and privileges you are eligible to be assigned. If you are a Community Provider, the Domain Name determines what Clients' information you may view. If required, the approving Admin may change or correct your Domain selection.

In order to complete the Registration process, you must also click the checkbox to confirm that you have read and understand the message in the banner at the top of the page.

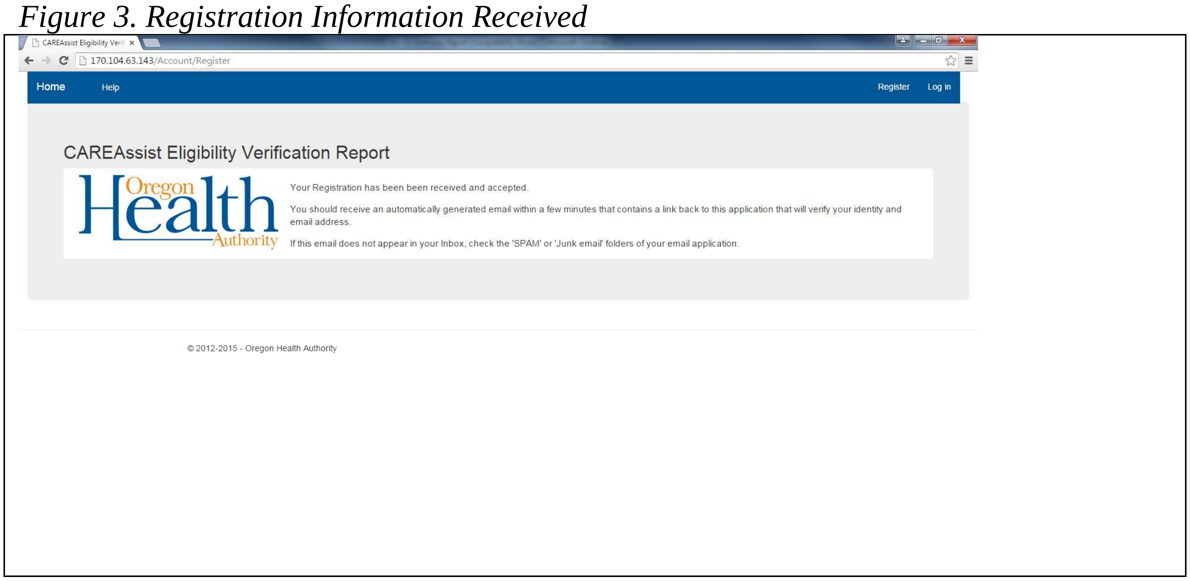
For security, the CAREAssist Eligibility Verification Report requires that your password comply with the following rules, which are subject to change:

1. Must be at least six characters long.
2. Must contain at least one capital letter and at least one lower-case letter.
3. Must contain at least one numeral 0-9.
4. Must contain at least one non-alphanumeric character.

After you have successfully provided all of the registration information, the application will send you a confirmation email that contains a hyperlink back to the application. This process ensures that nobody inappropriately gains access to the application using your email address as their identity, because they will not also have access to your email. When you return to the application by clicking on the hyperlink that is contained in the email, the application will be able to verify that you are the same person who entered the information in the first place.

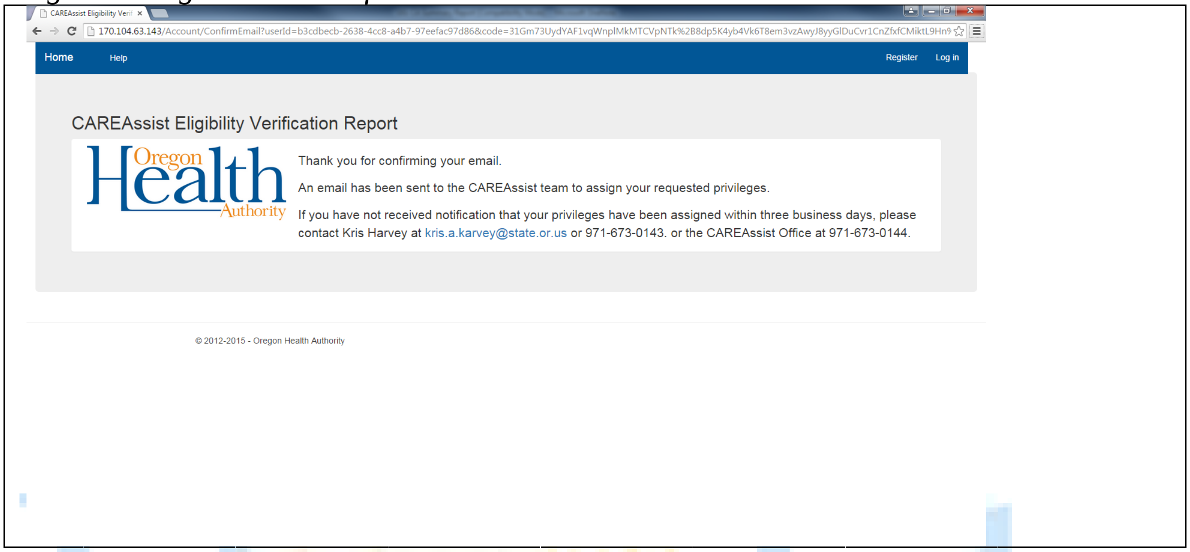
Because this email contains an embedded link, many email servers treat this email as SPAM and route it to a "SPAM" or "Junk Email" folder. If it does not arrive in your "normal" inbox within a few minutes, check your "SPAM" or "Junk Email" folder. When the confirmation email has been sent, your screen should look like Figure 3.

Figure 3. Registration Information Received



Click on the link provided in the email. In some cases, you may need to instruct your email program to enable the clicking of links before you can click on the link. Once you have successfully confirmed your email and identity, your screen will look like Figure 4.

Figure 4. Registration Confirmation



After you have confirmed your email and identity, an email will be sent to the CAREAssist team to notify an application Admin that you are ready to be assigned your Role(s) and privileges. If the email you used to register is known to the CAREAssist Program, you should expect to have a response within approximately three business days. When your privileges have been granted you will receive an email notification.

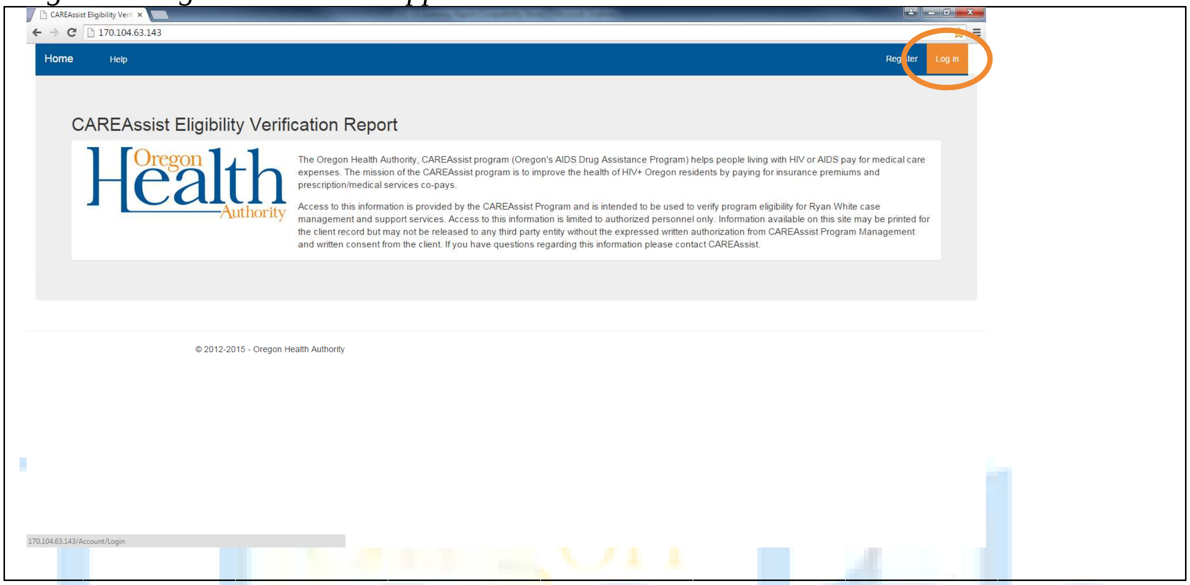
4. EMAIL NOTIFICATIONS

Although the CAREAssist staff members who have been assigned the Admin Role are the only individuals who have privileges to change your account information, the application is configured to send you a notification email whenever any information has changed relating to your account, when you did not initiate the change. This includes the addition or removal of any Roles/privileges as well as editing of your account information (Email, First/Last Name, Domain Name). When your account information has been changed, an email will be sent to both the ***old*** and the ***new*** email addresses to ensure that you have the opportunity to receive and, if necessary, respond to, the notification.

5. LOGGING INTO THE APPLICATION

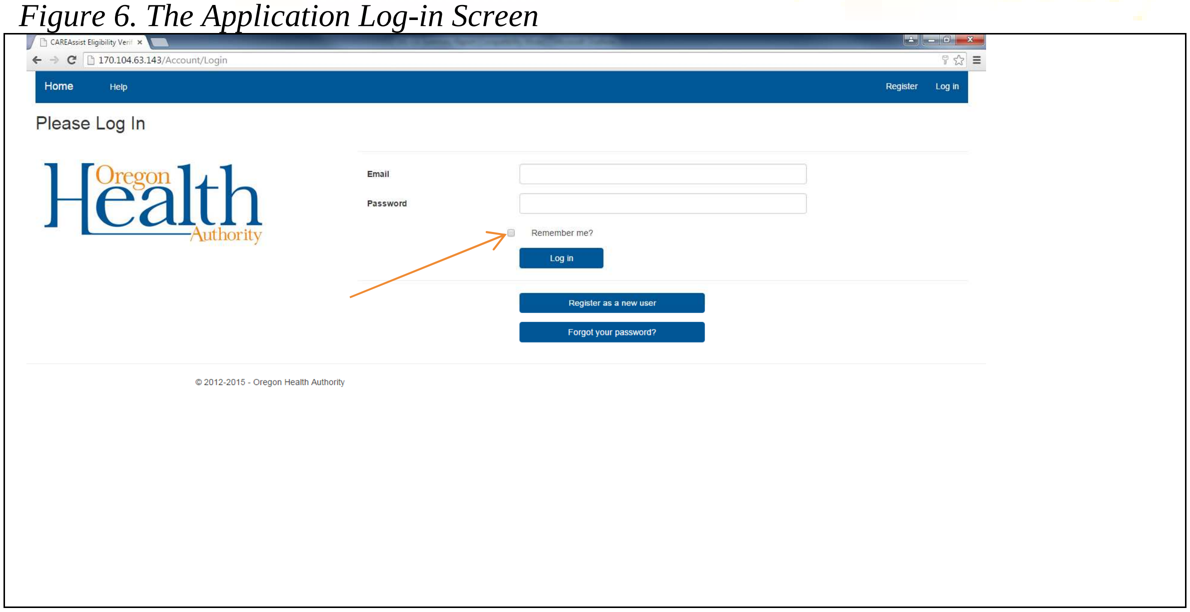
You may log into the application on one of several ways, such as clicking on the link shown in the Registration Confirmation screen of Figure 4, or by clicking on the words "Log in" on the navigation bar of the Home page, as shown in Figure 5.

Figure 5. Log in Link on the Application Home Screen



Enter the Email address you used to register and your password in the form spaces provided, and then click on the "Log in" button (see Figure 6). Checking the "Remember me?" box will allow the application to bypass requiring you to enter your email address and password. This is a great option if there are no other users of your computer – but every user of the machine will then have access to confidential Client information!

Figure 6. The Application Log-in Screen

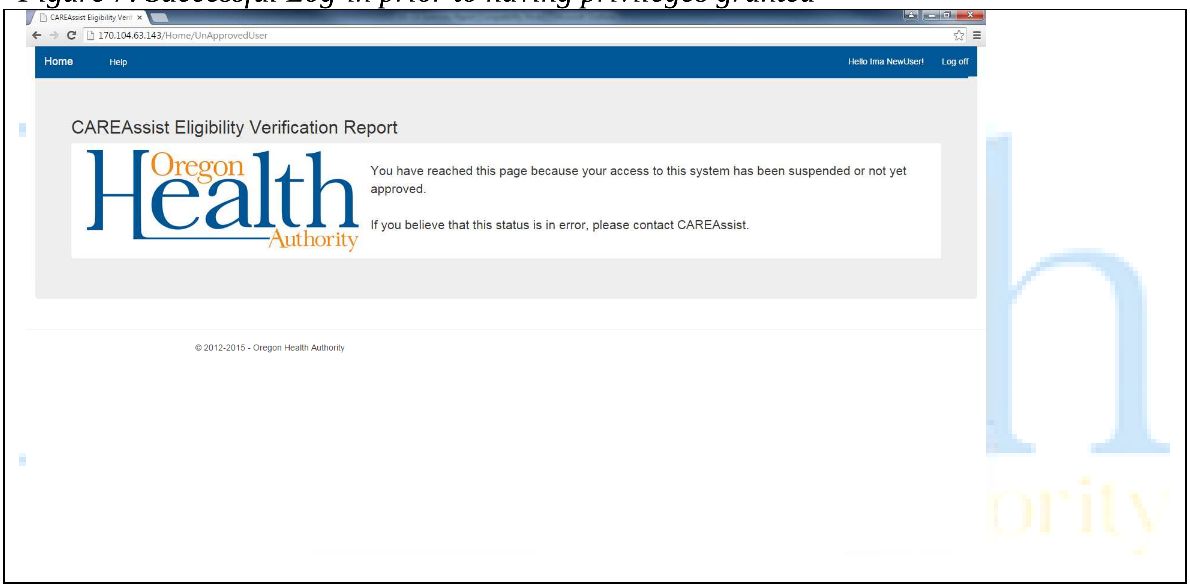


If you have provided the correct email and password, you will be logged into the application. You will know that you are logged in if the word “Hello” and your full name appear in the navigation bar, near the right-hand side of the screen. Otherwise, a message will appear that will prompt you to correct your entries.

Once your email and password have been verified against the database, you will be shown a default screen for your granted Role(s). The default screen for any User who has been granted privileges to view client information is the User’s Client List. Any Internal Team Members who have also been granted Admin privileges will always have the SuperUser (all Clients) Client List as their default screen upon logging in.

Users who have not yet been assigned privileges, or whose privileges have been suspended for any reason will be shown the screen of Figure 7.

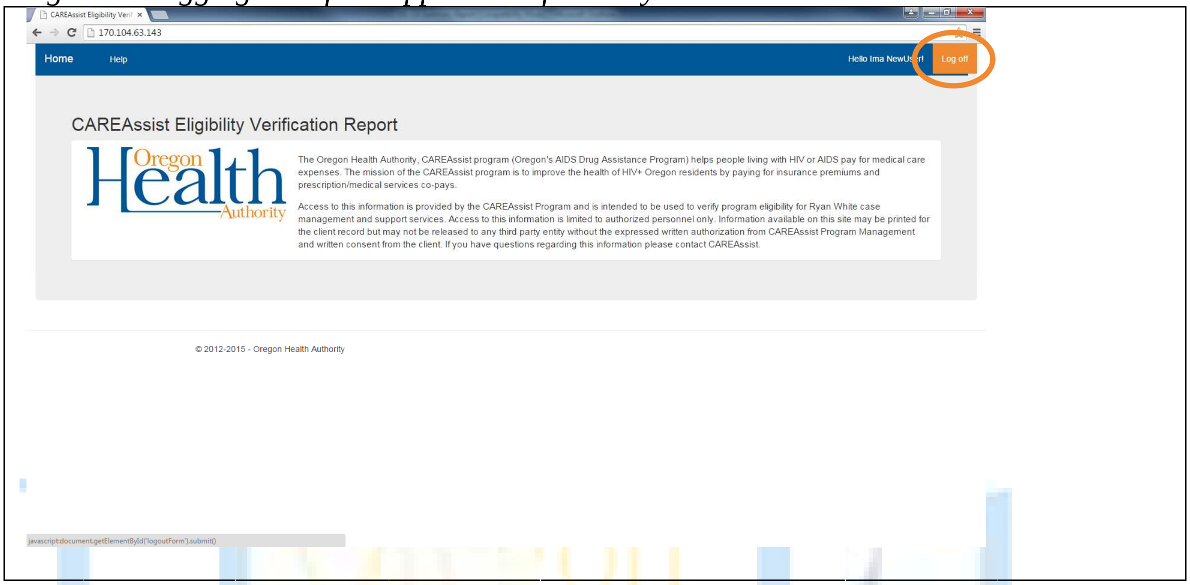
Figure 7. Successful Log-in prior to having privileges granted



6. LOGGING OUT OF THE APPLICATION

Whenever you are logged into the Application, to the right of your name is a button that will enable you to log out of the CAREAssist Eligibility Verification Report.

Figure 8. Logging out of the application from any screen



7. USER ACCOUNT MAINTENANCE

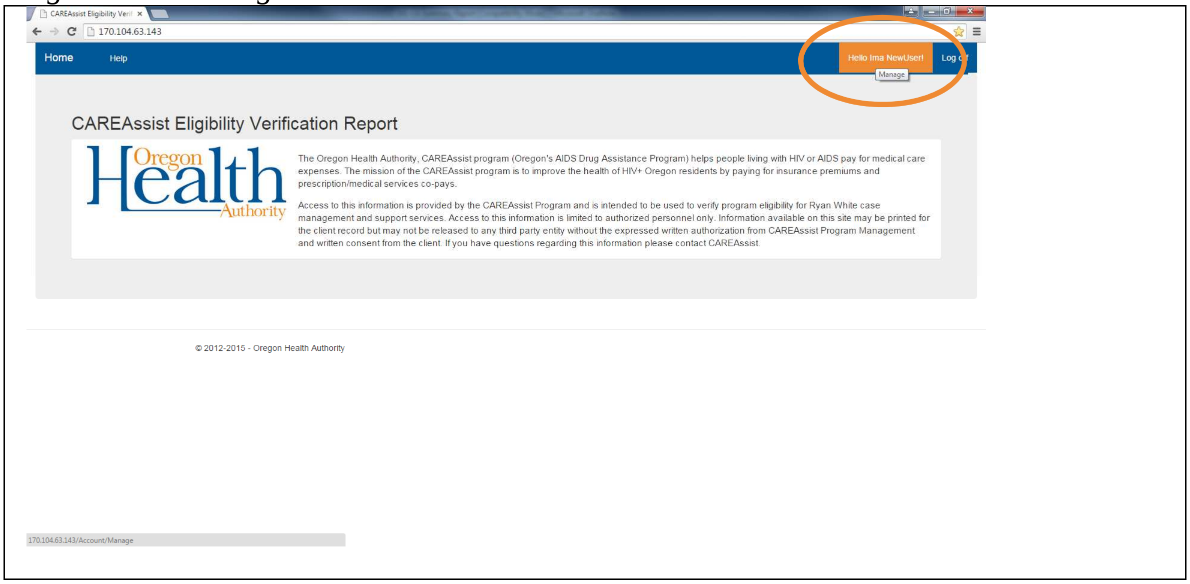
The CAREAssist Eligibility Verification Report allows you to maintain your user account information. There are three types of changes you can initiate:

1. User Information Update
2. Change Password
3. Recover Password

7.1. MANAGING ACCOUNT INFORMATION

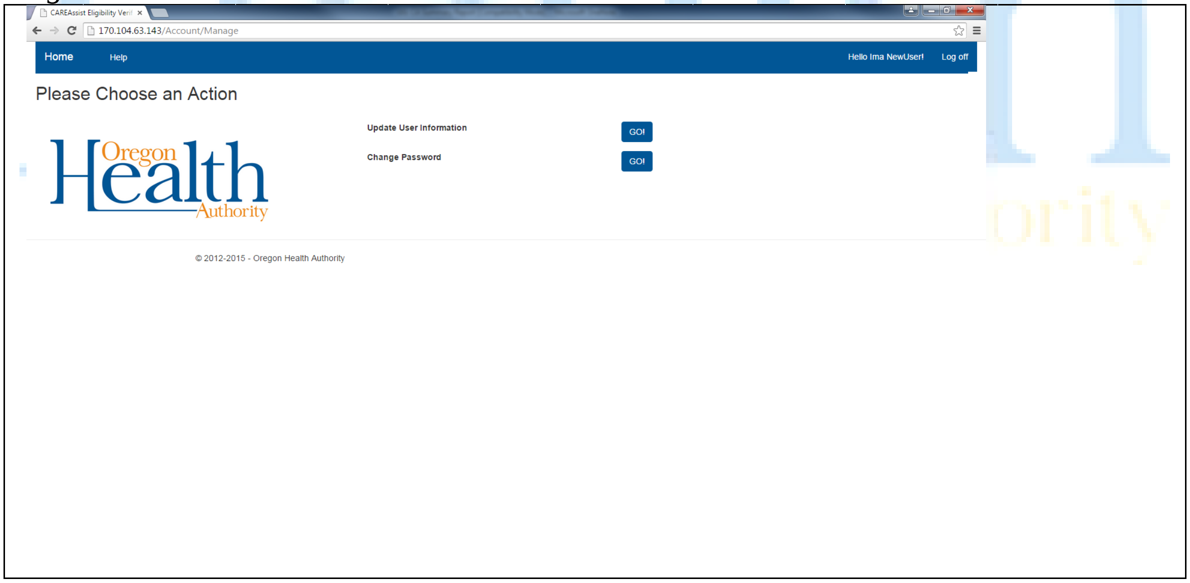
The Account Maintenance Menu is available whenever you are logged into the application by clicking on your name in the navigation bar, as shown in Figure 9.

Figure 9. Accessing the Account Maintenance Menu



You will be presented with the screen of Figure 10, which contains the Account Maintenance Menu.

Figure 10. The Account Maintenance Menu



This menu presents two buttons. One will allow you to edit your Account Information (Name or Email). The second will allow you to change the password associated with your account. Note that this password ***change*** operation is different from the password ***recovery*** operation.

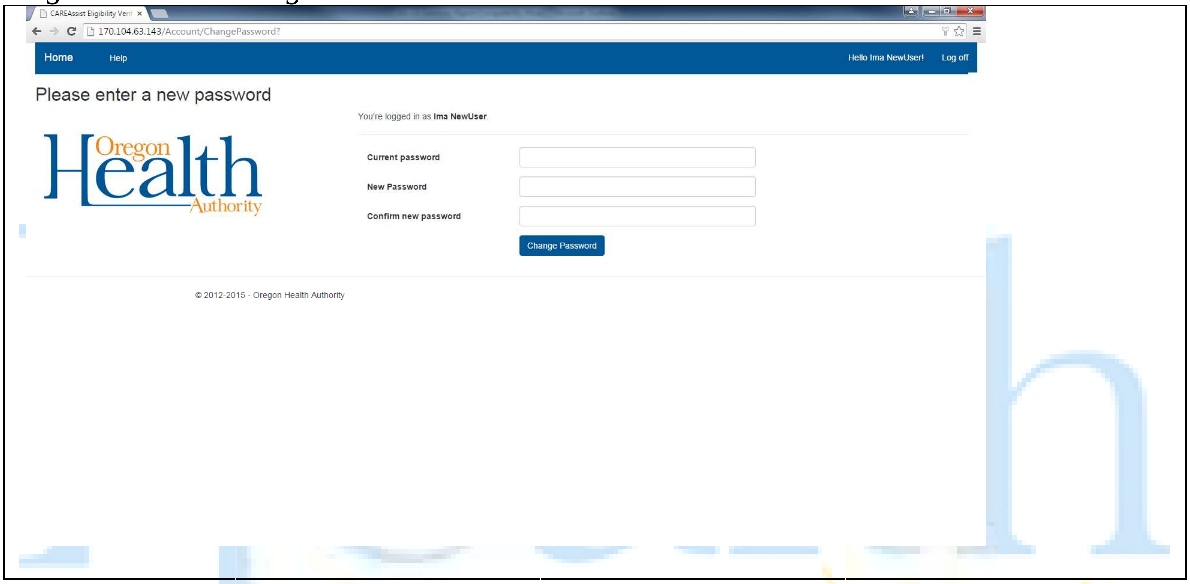
7.1.1. UPDATING YOUR USER INFORMATION

Clicking the “Go!” button next to the Update User Information label will present an abbreviated version of the Registration form in which you may alter your information in the database (Email address or First and Last Name). Buttons are provided that will either cancel the action or submit your changes.

7.1.2. CHANGING YOUR PASSWORD

Clicking the “Go!” button next to the “Change Password” label will allow you to change your password. Enter your current password and a new password in the spaces of the form provided, as shown in Figure 11.

Figure 11. The Change Password Form



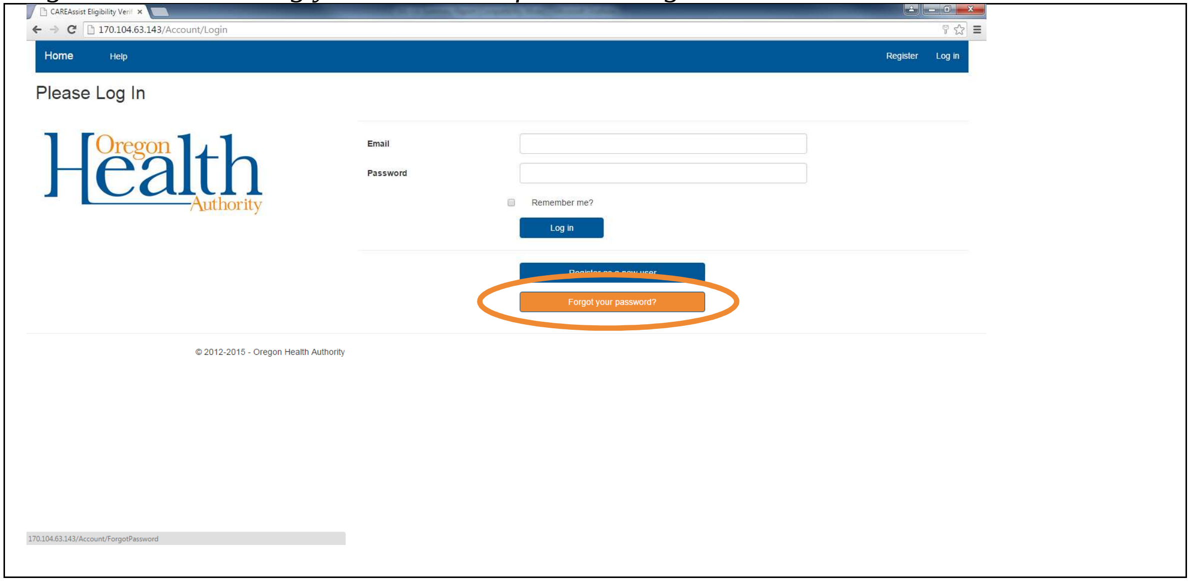
If you do not know your password and need to change it – if, for example, you have been logged in with the “Remember me?” option checked, log out of the application and follow the instructions in the section below to ***recover*** your password.

7.2. RECOVERING YOUR PASSWORD

If, at any time you should need to have your password reset because you do not remember it, there is a button on the Log-in screen that allows you to recover it.

From the Home screen, click on the Log in button, and you will see the “Forgot your Password” button that is shown in Figure 12.

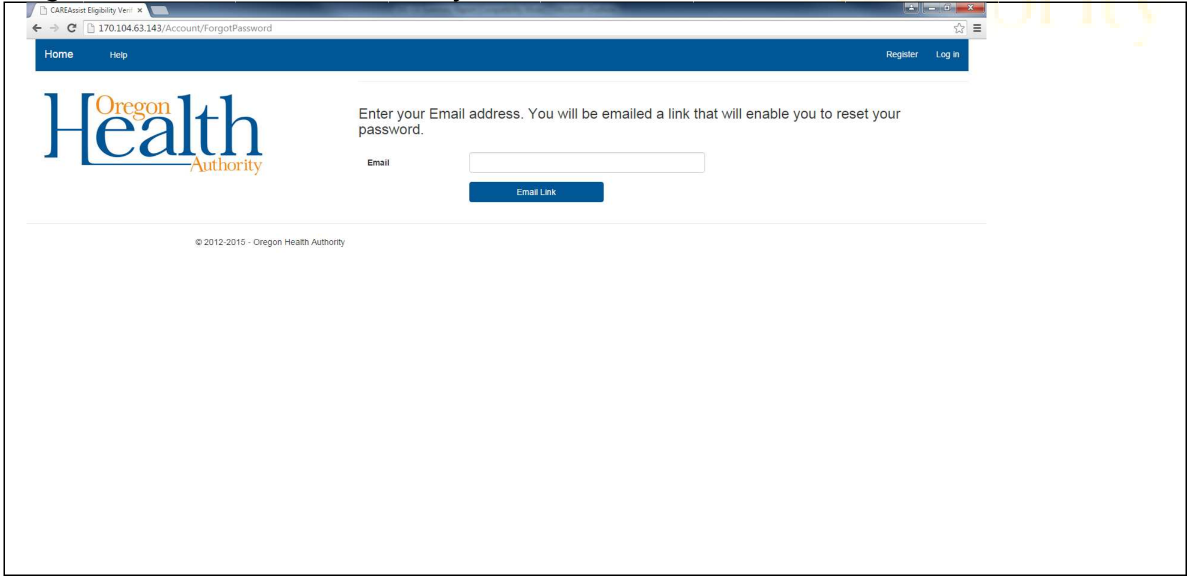
Figure 12. Recovering your Password from the Log-in screen



You will be presented a form (see Figure 13) in which you will enter your email address. After you click on the button, you will be emailed a link that will confirm your identity and then allow you to set a new password. The application requires that you confirm your identity prior to recovering your password in order to ensure that it is indeed you who has requested the password recovery. This is an extra measure to keep your account secure.

Be sure to check your SPAM or "Junk Email" folder if this email doesn't arrive in your regular inbox in a few minutes!

Figure 13. The Password Recovery Screen



8. THE CLIENT LIST

The main purpose of the CAREAssist Eligibility Verification Report is to provide to enable the Community Providers and Internal Team Members of the CAREAssist Program (Oregon's AIDS Drug Assistance Program) to verify program eligibility for Ryan White case management and support services.

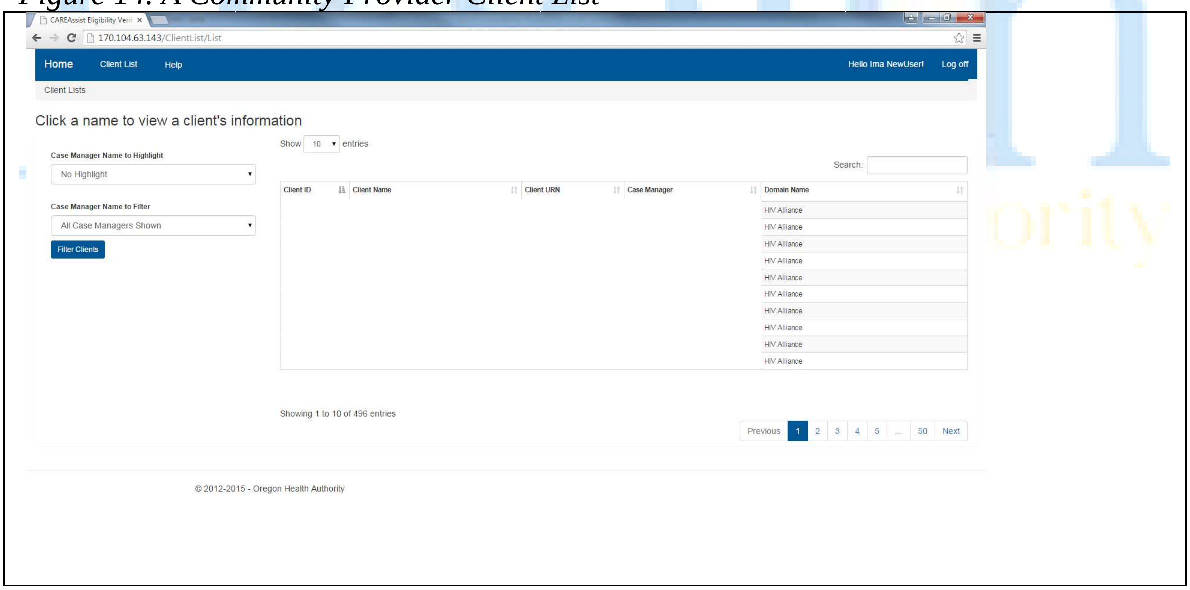
The application, therefore, allows you, if you are a Community Provider, to view a list of Clients that are served by any Case Manager that is associated with your Service Domain. If you are an Internal Team Member and are granted privileges to view Client information, you will be able to view all Clients served by all Domains – so be sure to take proper security precautions for this confidential information!

8.1. ACCESSING A CLIENT LIST

When you have been granted a Role that includes privileges to view Client information, the Client List screen loads whenever you log into the application. You can also access your Client List whenever you are logged into the application by clicking on “Client List” in the navigation bar.

A Client List for a Community Provider is shown in Figure 14. Note that in the Screen Captures shown in this guide, all Client Information is hidden from view – but you will see actual Client data.

Figure 14. A Community Provider Client List



8.2. FEATURES OF THE CLIENT LIST SCREEN

The Client List screen includes various features that will enable you to research individual or groups of Clients.

The Clients that are served by the Program, as of the time that the Client List was created populate a data table that appears in the main section of the screen, slightly offset to the right.

There are five sortable columns on information: Client ID, Client Name ("Last, First", the Client's URN, the Client's Case Manager, and the Case Manager's Domain Name. If you are a Community Provider, the Domain Name column should always contain the same value. But if you are an Internal Team Member, the information in this column will represent all of the Domains served by the Program.

8.2.1. SORTING THE CLIENT LIST

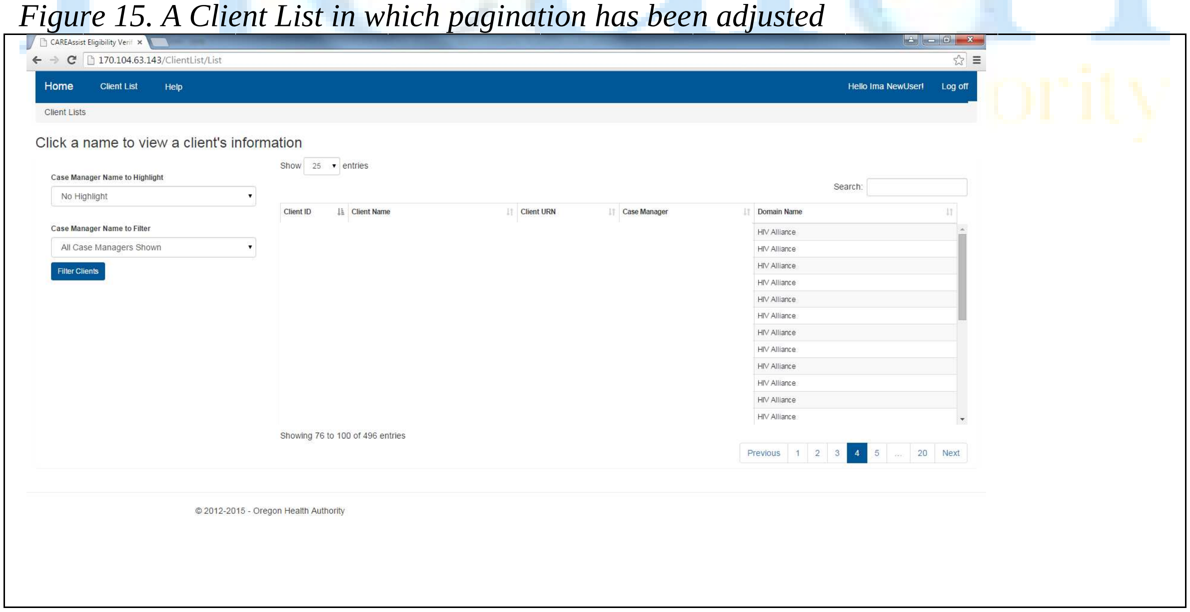
Sorting the Client List is as simple as clicking on a column header! The icons change from light to dark grey to indicate which column is currently being used for sort. The dark grey one is "active", with the direction of the sort indicated by the "tower of blocks." The initial view sorts the Client List by the Client ID, from lowest to highest, hence the dark icon in that column header with the "tower of blocks" with the widest blocks at the bottom.

8.2.2. REPAGINATING THE CLIENT LIST

This example has 496 Clients that can be viewed. We know this because of the message that says "Showing 1 to 10 of 496 entries" to the bottom-left of the table. We can manipulate the pagination of the list in several ways. First, to the upper-left of the table is a pull-down in which we can select the number of rows that will be displayed on a page. A vertical scroll bar is incorporated into the window should the number of clients exceed the capacity of the view.

Second, we can select different pages of the Client table to view by clicking on the various buttons to the lower-right of the table. In Figure 15, we have selected the fourth page of this Client List, which has been changed to also have 50 entries per page.

Figure 15. A Client List in which pagination has been adjusted



8.2.3. FILTERING THE CLIENT LIST

There are two ways in which you can filter the Client List. First, click in the box labeled "Search" and start typing. As you type each character, the application will search each data field for every Client, and it will display only those clients who have information that matches your input. The total number of entries on the bottom-left will change, as will the number of pages shown in the pagination button to the bottom-right. This search is not case-sensitive, as "john" will return the same output as "jOhN". This will also return, for example, any Client with a first name "John", last name "Johnson", or Case Manager with any of those. But it can be a powerful way to find information quickly if you know a name or Client ID and want to get to that person's details.

The second method to filter re-queries the database to return the Clients associated with a single Case Manager and repopulates your screen with that information. This can be a useful way to view your own clients or those of an individual one of your colleagues, for example. Select a name from the drop-down list labeled "Case Manager to Filter" and then click on the "Filter Clients" button. Note that unlike the "Search" box, this is not a "filter-as-you-type" feature but requires you to click on the button to activate it! All of the Case Managers that are included in the table at least once are included in the pull-down list – even those who have been excluded by any active filter in the "Search" box.

There are two ways to clear a drop-down filter. You can select "All Case Managers Shown" and then click the "Filter Clients" button. Alternatively, you can reload the Client List from scratch by clicking on "Client List" in the navigation bar.

The Client List of Internal Team Members has an additional drop-down labeled "Domain Name to Filter." This selector provides Internal Team Members another option for filtering their Client List. Clients returned when the "Filter Clients" button is clicked must meet the criteria of ***both*** dropdowns, however.

8.2.4. HIGHLIGHTING THE CLIENT LIST

One additional feature of the Client List is the ability to highlight one Case Manager's name – independent of the other filtering or sorting of the Client List. To activate this feature, select a Case Manager's name from the drop-down list labeled "Case Manager Name to Highlight." That Case Manager's name will now appear in a bright yellow background for every client. Unlike the filtering drop-down, this highlighting dropdown does not re-query the database and therefore acts immediately on the output you are viewing. This can be a convenient way to have a specific Case Manager's name (yours, perhaps?) be identifiable on screen while you have specific filters or sorting parameters in place. To clear the highlight, select another name, or "No Highlight."

The Client List of Internal Team Members has an additional drop-down labeled "Domain Name to Highlight." This selector provides Internal Team Members another option for highlighting their Client List. Internal Team Members can choose to use one, both, or neither of these options, as they operate on the individual cells of the table and both highlight results do not need to operate on the same Client.

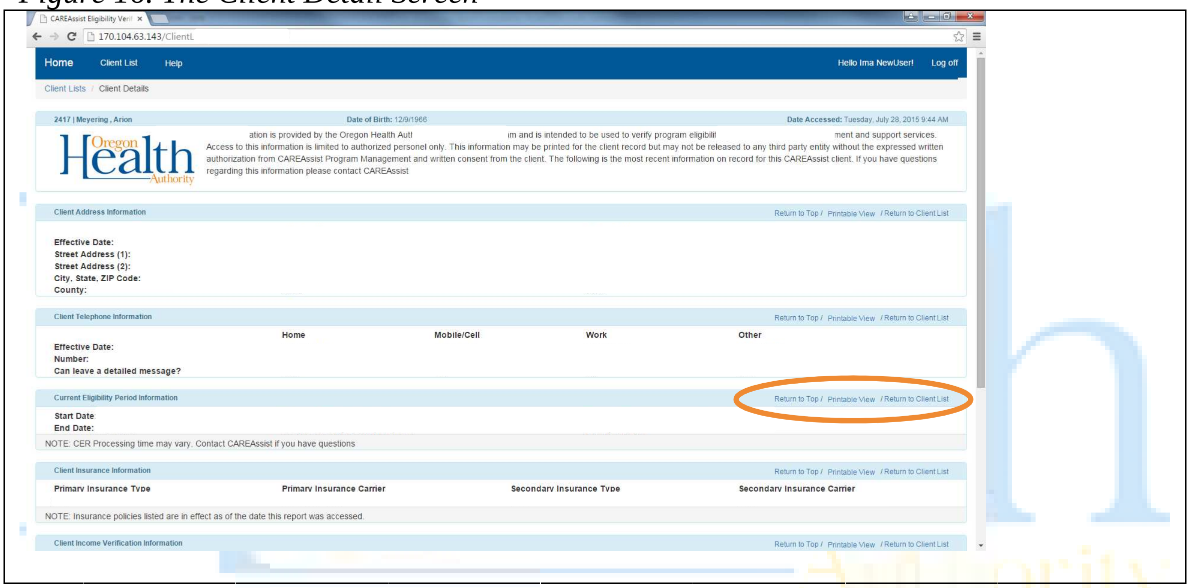
9. VIEWING CLIENT DETAILS

The CAREAssist Eligibility Verification Report is a tool to provide you an instantaneous snapshot of a Client's eligibility – it provides neither a historic perspective nor any future outlook.

9.1. ACCESSING CLIENT DETAILS

Clicking on any Client's name in a Client List will allow you to view that Client's details, as of that moment in time. The Client Details screen, an example of which is shown in Figure 16, shows an organized listing of the Client's current information, as of when the moment it was access (which is always shown across the top of the page, beside the Client's name and date of birth).

Figure 16. The Client Detail Screen



9.2. PRODUCING A PRINTABLE (PDF) VIEW

In each panel's header, you will find links that will allow you to (1) Return to the top of the page, (2) Produce a printable (PDF) view, or (3) Return to your Client List. Clicking the center of these links will create a PDF file and download it to your computer for your use. Be aware of the presence of these files and the confidential information present in them!

Table 2 Revision History

Version	Date	Description	Author
1.0	**-**	**Document created**	**Jeff Zola**