

DataPool 2.0 User Manual

Community Data Roundtable Pennsylvania CANS

Updated April 2016



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Overview

This document contains training information on the use of the DataPool™. The DataPool is the electronic version of Community Data Roundtable's Pennsylvania Child and Adolescent Needs and Strengths (CANS) assessment. The CANS was developed by John S. Lyons, Ph.D. and has been adapted for use in numerous localities, states and countries. It is a strength-based, multi-purpose tool used in service delivery systems that address the mental health of children, adolescents and their families. It has three primary uses:

- ▶ To support decision-making, including level of care and service planning
- ▶ To facilitate quality improvement initiatives
- ▶ To allow for the monitoring of outcomes of services

Community Data Roundtable (CDR) has collaborated with a large number of individuals and organizations, including an extensive expert advisory board, in the development of the CDR Pennsylvania CANS. The CDR CANS-PA can be tailored to meet local service care needs. The CDR CANS-PA has been designed with the needs of youth with an Autistic Spectrum Disorder and service planning in mind.

Currently, there is no statewide CANS implementation initiative in Pennsylvania, however, many counties are now requiring county-wide implementation of the CANS because of its role in helping children get the care that they need. Community Data Roundtable works with many of these county programs to assist them with their implementation of a system-wide CANS initiative. Likewise, many providers are using the CANS within their own agencies.

Everyday the DataPool is collecting data from evaluations conducted across Pennsylvania, in order to develop powerful, locally relevant, evidence-based norms. These norms are then available to evaluators during their evaluations, in order to assist in making data-driven service prescriptions.

Security

- ▶ The CDR DataPool is fully encrypted (256 bit).
- ▶ The Medicaid Identifier is kept separate from all other data, and fully encrypted, so trace back is impossible.
- ▶ A user password must be kept secret. There is a prompt to renew a user's password once a year.

User Administration

Accessing the DataPool

The DataPool can be accessed from any device with Internet access: a laptop computer, a desktop computer, a tablet (e.g. an iPad), or a smartphone (e.g. an Android or iPhone).

The DataPool can be accessed through the login screen on the Community Data Roundtable website at www.communitydataroundtable.org or by entering the direct URL in your browser's address bar: <https://pool.communitydataroundtable.org>.

**Note: Please download the most up-to-date version of any Internet browser you are currently using. Internet Explorer versions older than IE7 may not display the information correctly.*

Registering with the DataPool

To maintain the security and privacy of data, the DataPool requires a username and password to be set up. This is done through a registration process that enables Community Data Roundtable to identify who users are and how they are to interact with the DataPool. Three levels of authorized users are possible:

- ▶ **Evaluator:** These users access the CANS tool. These users have access to the online assessment tool, but not to the import/export features of the DataPool. Evaluators can download and print a client's CANS Summary, including the Communimetric Service Match report, and inputting prescription information.
- ▶ **Therapist:** These users access the CANS tool. These users have access to the online assessment tool, but not to the import/export features of the DataPool. Therapists do not have the ability to input prescriptions into the CANS, and do not receive information on Service Matches.
- ▶ **Non-Evaluator Read-Only/Management (e.g. Transcription):** These users can view all data specific to their organization. They do not have access to the CANS tool or the import/export feature. These users can download and print a client's Communimetric Service Match report and prescription information.

Creating An Account

New users can request access to the DataPool by clicking the **Create an Account** link at the top right of the DataPool main page.

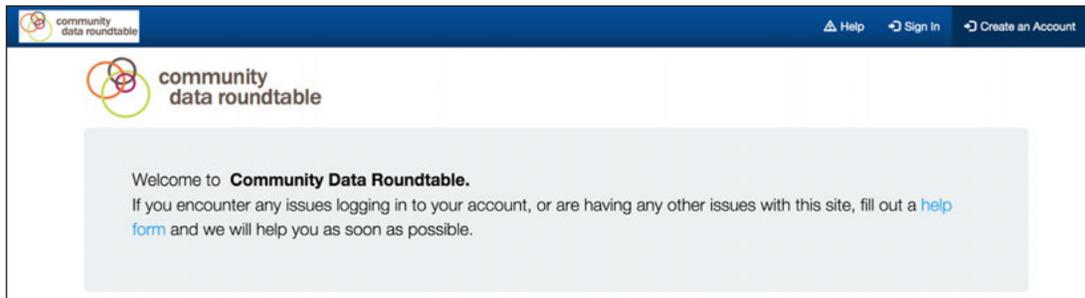


Figure 1 – Home Page

The registration screen will then appear asking for User information.

Figure 2 – Registration Page

 All users at the Evaluator and Therapist User Levels will be **required to verify their current CDR CANS-PA certification status and date of certification**. This is required for approval to access the CDR DataPool.

Users can obtain a copy of their CDR CANS-PA Certificate by accessing their account at www.canstraining.com. Please make sure to register under the Jurisdiction listed as

Pennsylvania–Community Data Roundtable. For more information on how to become CANS certified online, please read the CDR CANS–PA Certification and DataPool Registration manual available on our website.

Users will receive an email confirming their DataPool account activation within 48 hours of submitting their registration information.

Password Requirements

Users will be required to create their own password during the online registration process. We recommend using a strong password. At the very least, passwords must:

- ▶ Be at least 8 characters long
- ▶ Contain at least one capital letter
- ▶ Contain at least one number

Signing In

Once registered, a User can login to the DataPool using their email address and the password created during the registration process.

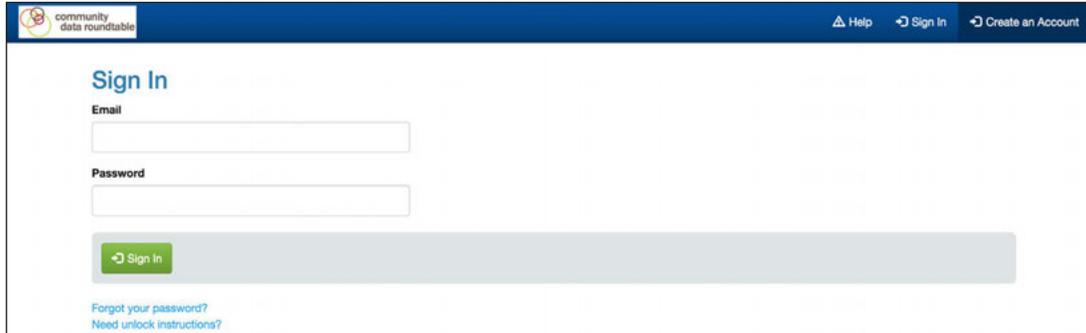


Figure 3 – Login Page

Any questions regarding login issues or passwords can be directed to the CDR DataPool Help Center at support@communitydataroundtable.org.

Forgotten Password/Reset Password

A User who has forgotten their password for the DataPool can follow these steps:

1. Click the **Forgot your password?** link on the login page and enter the email address associated with your account.
2. Click the **Send me reset password instructions** button

An email will be sent to the User email address that was entered in the User profile during the registration process. This email will provide further instructions with a link to reset the password.

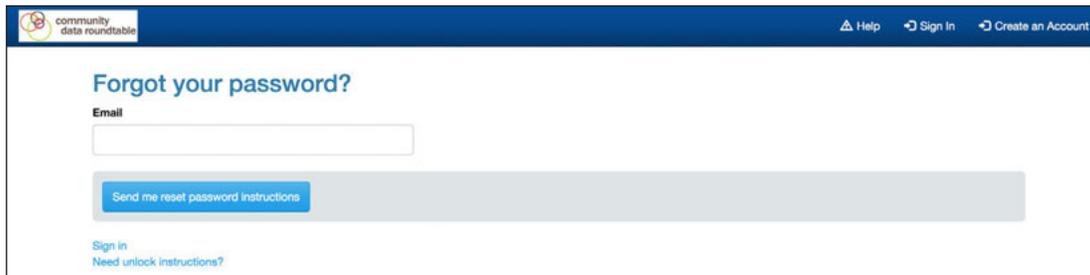


Figure 4 – Reset Password

Signing Out

To maintain appropriate security for the data, please ensure you sign out of your DataPool account when you are finished with your session. The **Sign Out** link can be found in the drop-down menu at the top right of your screen. If you remain inactive for a short period of time, you will be logged out automatically. If this should happen, click the **Sign In** option on the top menu to log in again.

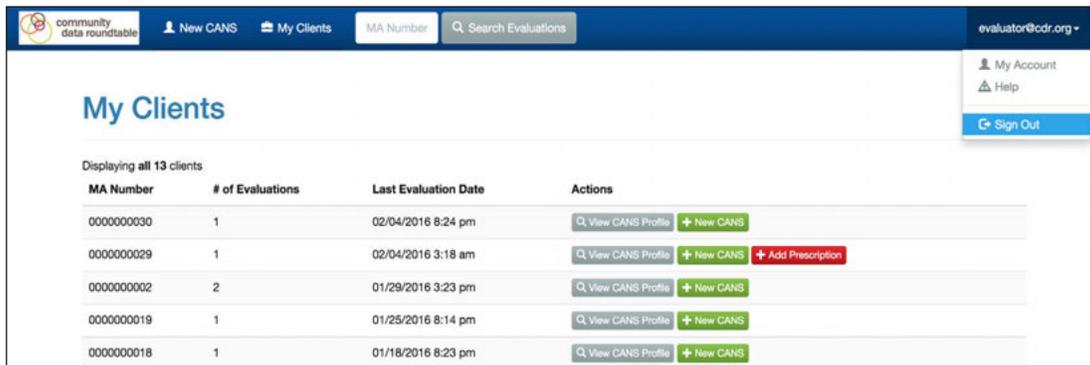


Figure 5 – Log Out Screen

Deleting a User

Once a User has been added to the DataPool, the User cannot be deleted from the system. However, the DataPool system does allow for a User to be deactivated. This is done to provide continuity for historical data in the system—deleting a User who performed an assessment would delete the User from the assessment and from all reports.

Deactivating a User

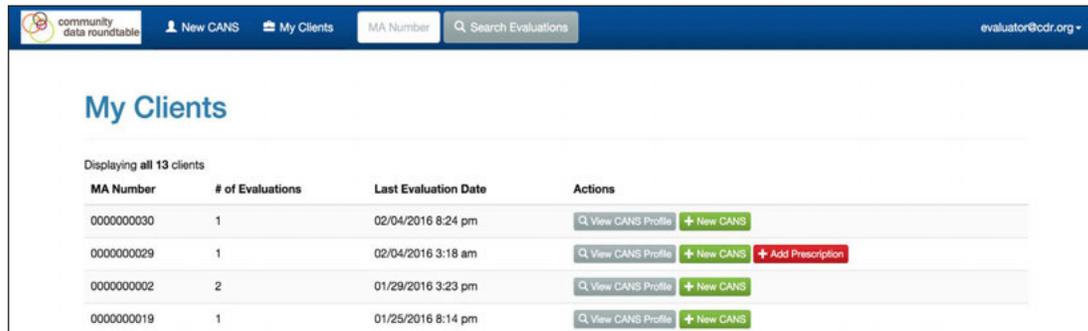
In order for a User to be deactivated, CDR must be notified in accordance with the User License and Security Agreement. Users themselves may make this request to CDR. An approved administrator at the same organization may also make the request.

Requests to deactivate a User must be made via the CDR DataPool Help Center menu option or by emailing support@communitydataroundtable.org.

CDR regularly audits the DataPool for activity in order to keep the roster of active users fresh and accurate.

Client Administration

When a User first logs in to the DataPool they will be directed to their personal My Clients screen. The My Clients screen lists all MA numbers associated with a User (e.g. clients who have gone through the CANS assessment with that particular User). It also displays the number of CANS a User has scored for the client, the date of the last CANS scored for the client, and the most recent CANS profile of the client.



The screenshot shows the 'My Clients' interface. At the top, there is a navigation bar with the 'community data roundtable' logo, a 'New CANS' button, a 'My Clients' button, a search box for 'MA Number', and a 'Search Evaluations' button. The user's email 'evaluator@cdr.org' is visible in the top right. Below the navigation bar, the title 'My Clients' is displayed. Underneath, it says 'Displaying all 13 clients'. A table lists client records with the following columns: MA Number, # of Evaluations, Last Evaluation Date, and Actions. The table contains four rows of data.

MA Number	# of Evaluations	Last Evaluation Date	Actions
0000000030	1	02/04/2016 8:24 pm	Q View CANS Profile + New CANS
0000000029	1	02/04/2016 3:18 am	Q View CANS Profile + New CANS + Add Prescription
0000000002	2	01/29/2016 3:23 pm	Q View CANS Profile + New CANS
0000000019	1	01/25/2016 8:14 pm	Q View CANS Profile + New CANS

Figure 6 – My Clients Screen

Locating a Client

To locate a client's record, enter the client's unique Medical Assistance number into the text box at the top of the User's My Clients homepage and click the [Search Evaluations](#) button. As a result, this will display the client's assessment page. To protect client privacy, the search feature finds only the clients that match to the User's specific organization and will only display any prior assessments entered by the User's organization. If the client is in the DataPool under a different organization, the record will not be displayed.

Searching for Existing Clients

Enter the client's MA number into the **Search Evaluations** box at the top of the screen. This will search for all records with matching information.

No Records Found

If the client search is unsuccessful, **No Records Found** will be displayed. This means the client you searched for is not in the system yet for your organization and will need to be added.

Adding a Client

To add a client, you must score a CANS evaluation for that client. Click on the **New CANS** link in the top menu. Once you are directed to the New CANS Evaluation page, input the client's information and score their CANS.

The screenshot shows the 'New CANS Evaluation' form with the following sections:

- Header:** community data roundtable, New CANS, My Clients, MA Number, Search Evaluations, evaluator@cdr.org
- Form Fields:**
 - Evaluation Date: 03/05/2016 (click here to change)
 - MA Number: [Text Input]
 - County: [Dropdown]
 - Date of Birth: 03/05/2016 (click here to change)
 - Initial evaluation for this client?:
 - Which insurance BH-MCO does this client use?: PerformCare, VBH, State/FFS, CCBHO, Magellan
 - Gender: Male, Female
 - Primary Diagnosis Code: [Text Input]
 - Additional Diagnosis Codes: [Text Input]
- Problem Presentation (Rating Scale 0-3):**
 - Psychosis
 - Attention Deficit/Impulse
 - Autism Spectrum
 - Depression/Anxiety
 - Oppositional Behavior
 - Antisocial Behavior
 - Anger Control
 - Substance Abuse
 - Adjustment to Trauma
 - Attachment
- Child Safety (Rating Scale 0-3):**
 - Safety
- Additional Diagnosis Codes:** [Text Input]
- Caregiver Needs and Strengths (Rating Scale 0-3):**
 - Physical/Behavioral Health
 - Supervision
 - Involvement
 - Knowledge
 - Organization
 - Resources
 - Residential Stability

Figure 7 – Add a new client by entering new CANS evaluation

Enter the information you have for the new client:

- ▶ **MA Number:** Enter the 10 digit Medicaid number that is used to identify clients. It is extremely important to ensure the accuracy of this number.
- ▶ **County:** The county where the member resides. This should match the county listed for the member in the Pennsylvania Eligibility Verification System (e.g. *EVS* or *Promise*).
- ▶ **Date of Birth:** Enter the client's date of birth.
- ▶ **Initial evaluation for this client? Box:** Click this box if this is an evaluation for the initiation of services. Leave this box blank if this is a Continued Stay review. A User should also click this

box if an extended period of time has passed since the time of a client's last assessment. (e.g. over 1 year)

- ▶ **Insurance BH-MCO:** Choose the correct Managed Care entity for the client.
**Note: At this time it is not possible to add clients who don't have an MA#.*
- ▶ **Gender:** Enter the client's born gender. If gender identity issues are a concern for this client, please note this in the comments section.
- ▶ **Diagnosis Codes:** Enter in the most important diagnosis code first. Currently accepting ICD-10 (DSM-5) codes. There is room for up to 3 diagnoses.

Click **Submit** to create an entry for the new client in the DataPool system.

Follow the steps in the below section titled **Scoring a CANS** under **Assessment Administration** if you are ready to add a client's assessment.

Editing Client Information

Once a client has been added to the system, a User may make changes to their client's data section but a client cannot be deleted from the system. To edit an existing client follow these steps:

1. Search for and find the desired client using the MA number.
2. Click the **Edit** button to change or add information about the client.
3. Click the **Update** button to save the information.
4. Click the **Cancel** button if there are no updates or to discard changes not yet saved.

Deleting a Client

Once a client has been added to the system they cannot be deleted from the system. Only details in the client data section can be edited. If you feel a client has been added in error, you must contact CDR using the Help Box. Please provide the MA number of the client, and explain why they should not be in the system.

What If the Client Has Been Assessed at a Different Organization?

If a client has indicated an assessment has been made previously by a different organization, you will not be able to see the assessment in your display. The DataPool will not share any assessment information conducted by another organization with a User.

Assessment Administration

Scoring the CANS

1. Score each item.

**Note: Hover over the item or action level values (0, 1, 2, 3) to reveal more detailed information. If using a tablet or other touchscreen device, touch the item once to reveal more details, and twice to select the item. To deselect the item and remove the tool-tip, touch the item a third time.*

2. Each need item defaults with a score of 0. You just need to pick and increase the score on those items that are relevant for the current client.

**Note: Strengths default at 3.*

3. A thorough evaluation requires that every item be accounted for. Each item must be scored for the form to submit correctly.
4. If you have any concerns on one of your scores, please address this in the box at the bottom of the form, where it says: "Please note any comments or concerns you have about the accuracy of this evaluation."
5. The data to justify the scores for each item should be found in the evaluation/client chart.
6. Click **Submit**.

Figure 8 – Scoring the CANS

The Response Screen

The Response Screen is broken down into four sections:

- ▶ CANS Graphical Display
- ▶ Prescription Interface
- ▶ Communimetric Service Matches
- ▶ CANS Table

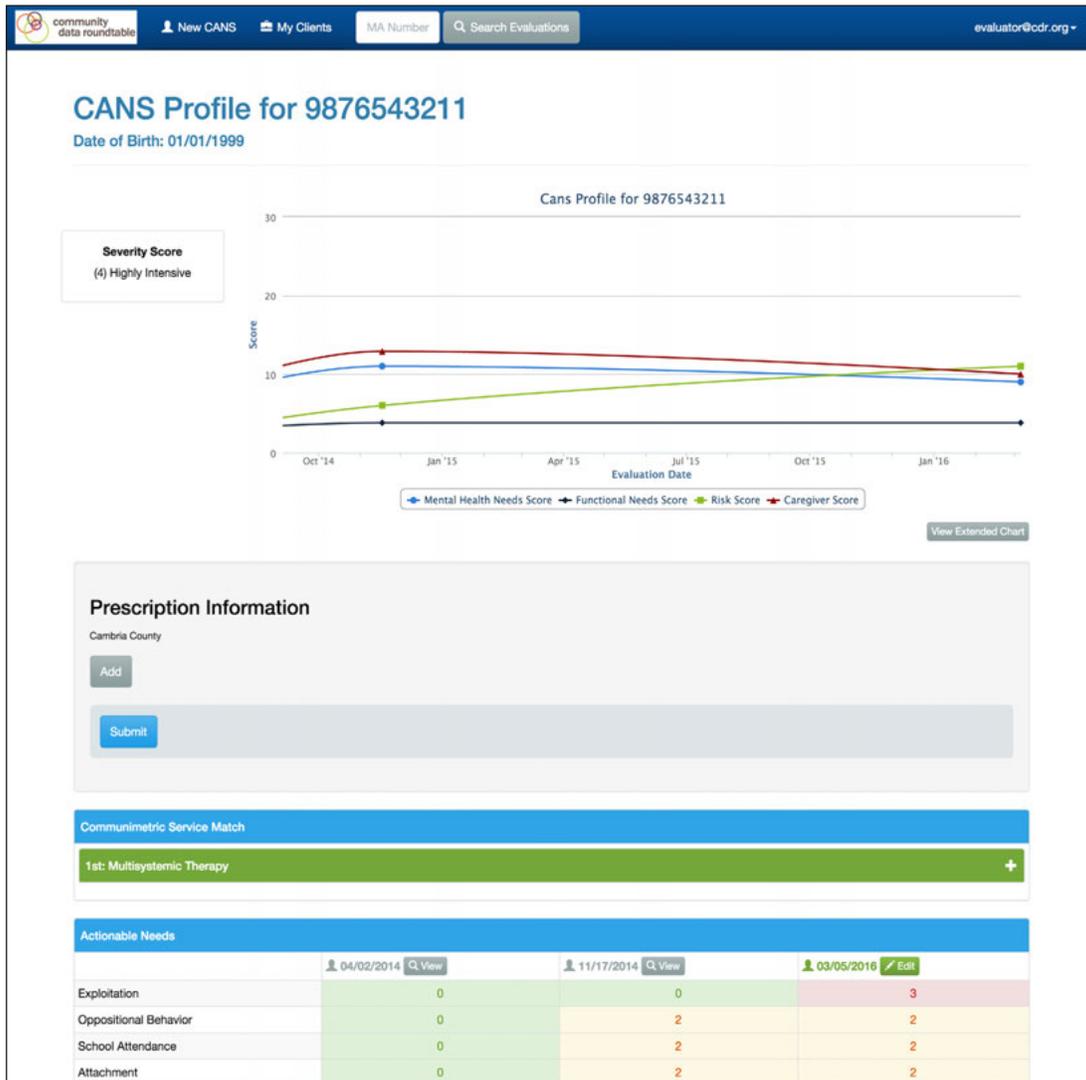


Figure 9 – Response Screen

CANS Graphical Display

At the top of the CANS response screen is a graphical display of all CANS data available for the member within the evaluator’s provider group. The data is laid out as a line chart over time. The Y axis represents the possible Domain scores. The X axis represents dates in time. By hovering one’s mouse over the points on the graph, one is able to see the exact date that the CANS were scored, as well as the Domain scores from that scoring, and the percentile ranking of that score against CDR norms.

The client's *current* Severity Score Level is noted to the left of the graph. The Severity Score is a proprietary Community Data Roundtable metric designed to operationalize the concept of Severity as articulated in the HealthChoices Program Standards and Requirements, Appendix T. **For more information about the Severity Score please refer to the CDR CANS-PA Interpretation Manual.**

***Note: Other information may also be found here (e.g. an Autism Level score. More information about these scores can be found in the interpretation manual.**

Prescription Interface

Once the CANS is analyzed, and all relevant information from the evaluation is considered, the evaluator puts their prescriptions into the CANS DataPool. Some of the analysis is only possible by looking at things lower on the screen than the Prescription Interface. However, the Prescription Interface is put up top since this is a place evaluators see right away. Nonetheless, remember to look down below the interface to get helpful information to help with your prescription decision. Here are the instructions:

1. Click the **Add** button under Prescription Information
2. Use the drop-down menu to select the service to prescribe. Fill in any additional fields specific to the chosen service.
3. If you are titrating a service, please put in the highest amount of the service into the box.
4. You can add multiple services by simply clicking **Add** to add a new service.
5. You can remove a service you had chosen, by picking the large red **Remove** button on the right.
6. When done listing all relevant services, click **Submit**.

Communimetric Service Matches

Below the Prescription Information box are the Communimetric Service Matches (CSMs). These are services and programs available in the child's county of residence that match the client's clinical profile as determined by CANS algorithms. The CANS algorithms are designed by CDR in collaboration with experts on the programs, and local system stakeholders. The algorithms are reviewed and updated regularly based off of data collected through the DataPool. The algorithms are available for review by any registered evaluator, and can be obtained by contacting CDR. Advanced training on the algorithms will be made available to registered evaluators on a regular basis.

Every CSM can be expanded to learn more about the program. Simply press on the **+** sign on the right of a CSM to open it up and learn the details of the program.

Some CSMs, when they are specialty programs, have contact information for finding a provider of the service in the local area. Information about the CSMs should be shared with the child and family, and considered in making a prescription decision.

To learn more about our algorithms and algorithm review process, please visit our website www.communitydataroundtable.org.

The CSMs are laid out in order, with the “best match” algorithms being displayed first, and then followed by lesser quality matches. Details on the logic for “prioritizing” the CSMs are available in the CDR CANS-PA Interpretation Manual.

For information on the CSM algorithms running in your area, please contact info@communitydataroundtable.org.

CANS Table

Underneath the CSM section is the area called the CANS Table. The CANS Table is broken into three parts:

1. The Client’s Needs
2. The Client’s Strengths
3. The Caregivers’ Strengths and Needs

The CANS Table only loads “Action Items.” That means Strengths that are scored at 0 or 1, and Needs that are scored at 2 or 3 (see table below for reference). The items are color coded: 0 and 1 are green, 2 is yellow, and 3 is red. The CANS table shows the historical CANS action items, as well as the items as identified in the current CANS evaluation. This information can show how the client’s treatment needs have changed over time.

Action Items included in the CANS Table	
Client’s Strengths	Scored at 0 or 1
Client’s Actionable Needs	Scored at 2 or 3
Caregivers’ Strengths and Needs	Scored at 0, 1, 2, or 3

The items identified in the CANS Table are items that should be addressed in the client’s treatment plan. These should be discussed with the family to ensure that they match the family’s understanding of their needs. They should also be discussed with the lead clinician in order to ensure that they are included in the treatment plan. It is often helpful for treatment leads to communicate about progress on items during continued stay reviews. During continued stay evaluations, reviewing the previous treatment plan, and its match with the previously identified

CANS items, can help ensure that the treatment plan is directed at the right needs for the child and family.

Editing a CANS

If the evaluator realizes they have to change something on their CANS, he or she can go back and change their CANS, by clicking on the green  Edit button on the CANS Table column header. Please note that edits are all tracked and audited. After 10 days, no more changes can be made.

If you find you do need to make a change after ten days, please use the following procedure:

1. Go to the Help box.
2. Type in the MA number of the member and list the items on the CANS that need to be changed as well as what they need to be changed to.
3. Click submit.

Example: Client 0000000987: please change Psychosis to 0, and Family Need to 2.

Timeline Issues

Please note that:

- ▶ A CANS cannot be submitted with a date that precedes the date of the evaluation.
- ▶ You can backdate a CANS up to 7 days from when you are actually submitting it.

If you need to backdate further than that, please use the following procedure:

1. Fill out the CANS normally, using the current date.
2. Use the Help Box to request that the CANS be backdated. The Help Box request must contain the MA number of the CANS, the date it was submitted, and the correct evaluation date. Support will change the date on the back end, and inform you when they are done.

***Note: You can make edits to a CANS up to 10 days after it was initially submitted. If you need to change things after 10 days, use the procedure explained above under "Editing a CANS".**

How to Print the CANS Results Report



Figure 10 – Print the CANS results report

An evaluator can only print the CANS evaluation after the prescription is entered and the CANS is submitted. To print it at that point, simply click on the link: **To Print PDF to add to your evaluation click here.**

Support

How to Contact the CDR Datapool Help Center

Any questions regarding the DataPool should be sent to CDR Support using the Help Box option located in the top menu. This Help Box is able to hold Protected Health Information (PHI, e.g. Medicaid numbers, names, etc.) because it is held in HIPAA compliant encrypted manner.

Reasons to contact support include:

- ▶ Changes that need to be made to CANS
- ▶ Changes that need to be made to client
- ▶ Technical Problems
- ▶ To comment on one of the algorithms

The screenshot shows the 'Help Box' interface. At the top, there is a navigation bar with the logo for 'community data roundtable' and several menu items: 'New CANS', 'My Clients', 'MA Number', and 'Search Evaluations'. On the right side of the header, the user's email 'evaluator@cdr.org' is displayed, along with a dropdown menu containing 'My Account', 'Help', and 'Sign Out'. The main content area features a heading 'We are here to help!' followed by a message: 'Use the secure online form below to let us know about any issue you are having. We strive to respond to all requests within 24 hours.' Below this is a tip: 'Tip: Before submitting a help request, please check the Frequently Asked Questions section at the bottom of this page. This section gives answers to queries regularly received by our support team.' The form itself includes several input fields: 'Email' (with 'user@company.com' entered), 'First name' (with 'First Name' entered), 'Last name' (with 'Last Name' entered), 'Provider group' (a dropdown menu), 'Help message type' (a dropdown menu), and a 'Message' text area with the placeholder text 'What kind of problem are you having?'. A blue button labeled 'Send for Help!' is positioned at the bottom left of the form.

Figure 11 – Help Box

It is also possible to email us directly at support@communitydataroundtable.org, but unless you are using an encrypted email service, emailing to this address does not guarantee HIPAA compliant data protections.

 **Do not send protected health information (PHI) or personal identifiable information via email. If you need to communicate PHI, use the in-app Help Box.**

For more information please contact us:

Community Data Roundtable
PO Box 535 Mars, PA 16046

info@communitydataroundtable.org