i-FamilyNet User Management: System Administration Tutorial

Department of Children & Families
Update date: 01/18/2017

Function of Administrators in i-FamilyNet:

- **Following are two aspects of System Administration in i-FamilyNet**

- **Organization:** Create divisions at Corporate / Lead Agency or Service Delivery Sites. Consumers or Cases could be assigned to these divisions for provision of services.

- **Users:** Associate staff to agency or sites or divisions. Provision roles to staff at the associated organizations. This allows the system administrators to control which consumers/cases/homes an i-Familynet user is able to access within their agency.

Administration roles in i-FamilyNet:

- **System Administrator:** Has the ability to create and manage divisions, attach users to divisions and provision i-FamilyNet roles to users. This role <u>cannot provision other System Administrator roles</u>. The role can be assigned to <u>more the one staff person</u> in a provider agency.

- **Access Administrator**: Has the ability to create and manage divisions, attach users to divisions and provision i-FamilyNet roles to users. This role <u>can provision other System Administrators</u> . The role can assigned <u>only to one person per agency</u>. Please contact the DCF Help Desk once a staff person has been identified to get this role.

Administration Setup rules

#1

#2

#3

a.

b.

c.

d.

Organizations

Sample Provider Inc (Provider)

New Bedford STARR (Service Division)

Waltham Group Home (Service Division)

Sample Service Delivery Site (Service Delivery Site)

Community SDS 114 Main Street (Service Delivery Site)

New Bedford Boys (Service Division)

Girls SDS (Service Delivery Site)

Lynn SDS (Service Delivery Site)

Counselling Services (Service Delivery Site)

Youth Services site (Service Delivery Site)

Wakefiled Services (Service Delivery Site)

Wakefield Group (Service Division)

Wakefield STARR (Service Division)

Organization Details

| **Name** | Sample Provider Inc | **ID** | 143539 | **Address** | 600 Washington Street, Boston, MA 02111 | **Phone** | (617)748-2000 |

Associated Staff | **Associated Divisions**

Staff Associated

Name	Person ID	Role	Open
Aaron, Mary	12709883	Executive Clinician/Multi-service (with transfer)	→
		Acute Care Clinician	
Abraham, John	15487308	System Administrator	→
		Executive Clinician/Multi-service (with transfer)	
		Consumer Assignment Manager	
Alan, Tanya	12503580	Corporate Support Staff	→
		System Administrator	
		Consumer Assignment Manager	
		Acute Care Clinician	
Aloha, Hawai	15288366	Executive Clinician/Multi-service (with transfer)	→
		System Administrator	
		Consumer Assignment Manager	
		Acute Care Clinician	
Alovera, Tony	12409938	Managing Clinician	→
Anand, Christine	12340956	Executive Clinician /Multi-service	→
Angel, Wilfred	15288291	Executive Clinician/Multi-service (with transfer)	→

- If a user is associated to the main organization (provider Level) *(#1)* they will have access to the consumers/cases/homes in *all* Service Delivery Sites *(#2, #3)* and *all* Divisions *(a, b, c , d)* within those organizations.

- If a user is associated to a Service Delivery Site *(#3)* they will have access to the consumers/cases/homes in that SDS and any divisions *(c, d)* that have been created under that SDS.

- If a user is associated to a specific division *(a, b, c , d)* they will only have access to the consumers/cases/homes in that Division.

Associate Staff to a Work Location

- Select the Service Delivery Site/Service Division/Family Resource Division to which you wish to grant the user access. You will see a list of staff members who are currently associated to the site on the Associated Staff tab.

- Click the Add New button to add a user to the highlighted Service Delivery Site/Service Division/Family Resource Division (a).

- Continued on next slide.

Associate Staff to a Work Location.. Continued

- You will see a list of all staff in your agency who have active Virtual Gateway accounts. If you do not find a specific name in this list it is because that person's Virtual Gateway account has not been created.

- Click the Action button across from the user whom you would like to associate to this site.

Associate Staff to a Work Location.. Continued

Select a Business Role

Select	Role Type ID	Role Type Name	Role Type Description
○	89	Non-Clinical Staff	Complete Incidents, transition planning data of children at acute care facilities. Both consumer and referral tracking sub tabs will be available to the staff. Read-Only access to all other consumer functions.
○	90	Clinician	Complete Treatment Plans, Progress Review, CANS, and Incidents and Census. Complete transition planning data of children at acute care facilities. Only referral tracking sub tab will be available to the staff.
○	91	Supervising Clinician	Complete Treatment Plans, Progress Review, CANS, and Critical Incidents and Census. Complete transition planning data of children at acute care facilities. Only referral tracking tab will be available to the staff. Run reports.
○	274	Acute Care Clinician	Complete transition planning data of children at acute care facilities. Both consumer and referral tracking tabs will be available to the user. Can be combined with other roles.
○	278	Domestic Violence Specialist	Add Domestic Violence Data Census by DV providers. Staff will see a domestic violence TAB in i-FamilyNet.

Select AddOn Role(s)

Select	Role Type ID	Role Type Name	Role Type Description
☐	274	Acute Care Clinician	Complete transition planning data of children at acute care facilities. Both consumer and referral tracking tabs will be available to the user. Can be combined with other roles.
☐	278	Domestic Violence Specialist	Add Domestic Violence Data Census by DV providers. Staff will see a domestic violence TAB in i-FamilyNet.

• Select **ONE** appropriate Business Role and Add-On Roles (If applicable) from the list presented.

• Please note that a staff person with a role at the corporate level can also be attached to a different role at a Service Division / Service Delivery Site (This shouln't be a frequent situation)

How to Edit/End Date a Staff Association

Organizations
Sample Agency (Provider)
Teen Living Program (Service Division)
Sample Site (Service Delivery Site)

Organization Details

Name	Sample Agency	**ID**	144041	**Address**	600 Washington Street, Boston, MA 02111	**Phone**	(617)748-2000

Associated Staff	Associated Divisions

Staff Associated

Name	Person ID	Role	Open
Clinician, Good	15965542	Clinician (Provider Level) Acute Care Clinician Consumer Assignment Manager	➡
Clinician, Jill	13326549	Clinician (Provider Level)	➡
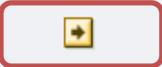
• Click the "Admin" tab, then the "Staff" sub-tab. This will display all staff from your agency that have a Virtual Gateway account.

• Select the staff member whom you would like to apply changes to. You will see each of their Organizational relationships and specific role within each organization. (see picture above)

• Click the Open button to the right to edit or end date a role.

How to Edit/End Date a Staff Association

Relationship

Organization Name	Sample Agency	**Organization ID**	144041	**Organization Type**	Provider	**Staff Name**	Clinician, Good	**Staff Person Id**	15965542

Existing Roles

Role Type ID	Role Type Name	Role Type Description
102	Clinician (Provider Level)	Complete and Approve Treatment Plans, Progress Review, CANS, and Incidents and Census. Complete transition planning data of children at acute care facilities. Only referral tracking sub tab will be available to the staff.
274	Acute Care Clinician	Complete transition planning data of children at acute care facilities. Both consumer and referral tracking tabs will be available to the user. Can be combined with other roles.
276	Consumer Assignment Manager	Transfer consumers in care of providers from Corporate Sites or Service Delivery Sites to Service Divisions. This is an add-on role. Can be combined with other roles.

Cancel | Edit | End Relationship

Click on the Edit button to edit the roles

Click on End Relationship button to terminate the association of a staff to an organization

Creating Divisions

- **Network Provider/ Family Resource Provider:** This functionality allows System Administrators the ability to create one or more organizational divisions within a network provider main organization or Service Delivery Site. Once divisions have been created providers can assign cases, consumers, or family resource homes to those divisions. (Family resource homes are assigned to a staff member within a division). Divisions allow the user to select a specified grouping of cases, consumers, or family resource homes.

- **Lead Agencies:** This functionality will allow the creation of case divisions within a Lead Agency in order to assign cases to specific staff persons. Divisions can be created only by users with a role of system administrators.

Creating Divisions.. Continued

- Select the Corporate Level Provider, at the top, or a Service Delivery Site (SDS), or a Lead Agency from the navigation pane.

- Click the "Associated Divisions" tab to the right. You will see any existing Divisions that have been created for that location.

- Click Add to create a new Division.

Creating Divisions.. Continued

- Enter the new division Name.

- Use the dropdown and select a Division Type . If you are family resource user you will be creating "Family Resource Divisions". If you are Lead Agency, you should create case divisions, while others will create "Service Divisions".

- Click "Save". You can now associate staff to this Division.

How to End a division

- Click the "Action" button to the right of the Division that you would like to end.

- Click the "End Division" button.

You cannot end a division that still has consumers/cases/homes assigned to it. If you attempt to do so you will receive an error message. You must reassign these before completing the steps noted above.

Questions

- Please contact your DCF planner.

  or

- Contact EHS IT Service Center at 617.994.5050

  (Monday through Friday: 6AM – Midnight)