System Administration Manual for ORCHIDS

Can't find it in the manual?
Contact ORCHIDS Application Support:
971-673-0382 or orchids.app-support@state.or.us

This document is available online:
public.health.oregon.gov/healthypeoplefamilies/datarepo
rts/orchids/pages/orchids_train.aspx

Revised: 3/9/2011 4:43:00 PM

If you need this information in an alternate format,
please call 971-673-0382.

Oregon Health Authority

Public Health Division

FamilyNet ORCHIDS Application Support

800 N.E. Oregon Street, Suite 370

Portland, Oregon 97232

971-673-0382

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Introduction

ORCHIDS

Oregon Child Health Information Data System is the data entry system within FamilyNet used to collect data for the Babies First, CaCoon, and Maternity Case Management programs. Data for billing, program evaluation, and Title V reporting are collected. ORCHIDS enables the program to analyze and describe the services being provided by Maternal and Child Health (MCH) programs across Oregon.

What is FamilyNet?

FamilyNet is an integrated family health data system used to collect client information for Maternal and Child Health programs.

FamilyNet can:

- Link the public health services provided for a child or family
- Track and report on referrals made
- Evaluate the effectiveness of DHS programs at both the county and state level

FamilyNet ORCHIDS has replaced WCHDS and the Perinatal data system.

What other programs use FamilyNet?

The following programs use FamilyNet:

- Babies First!
- CaCoon
- Maternity Case Management
- WIC
- Immunization

What is the benefit of using FamilyNet?

FamilyNet stores some information that is common to clients across program applications, such as name, address, and phone number. If you have a client that has been referred from WIC, you can search for that client in FamilyNet, and the client's demographic information will already be entered in the system. As a result, you will not have to re-enter the client's demographic information.

Need help?

If you have questions or comments about information in this manual, contact ORCHIDS Application Support:

971-673-0382 or orchids.app-support@state.or.us

Lesson 1: Logging into FamilyNet

1. Double-click on the Citrix icon on your desktop. On some desktops it looks like a blue circle with white papers inside of it; on other desktops it looks like a yellow door. The label on the icon may have been renamed in your office. The Citrix icon is the icon you use when you log into the FamilyNet TWIST, IRIS, or ORCHIDS modules.

 or

2. This website should open: https://dhs.oregon.gov/vpn/index.html
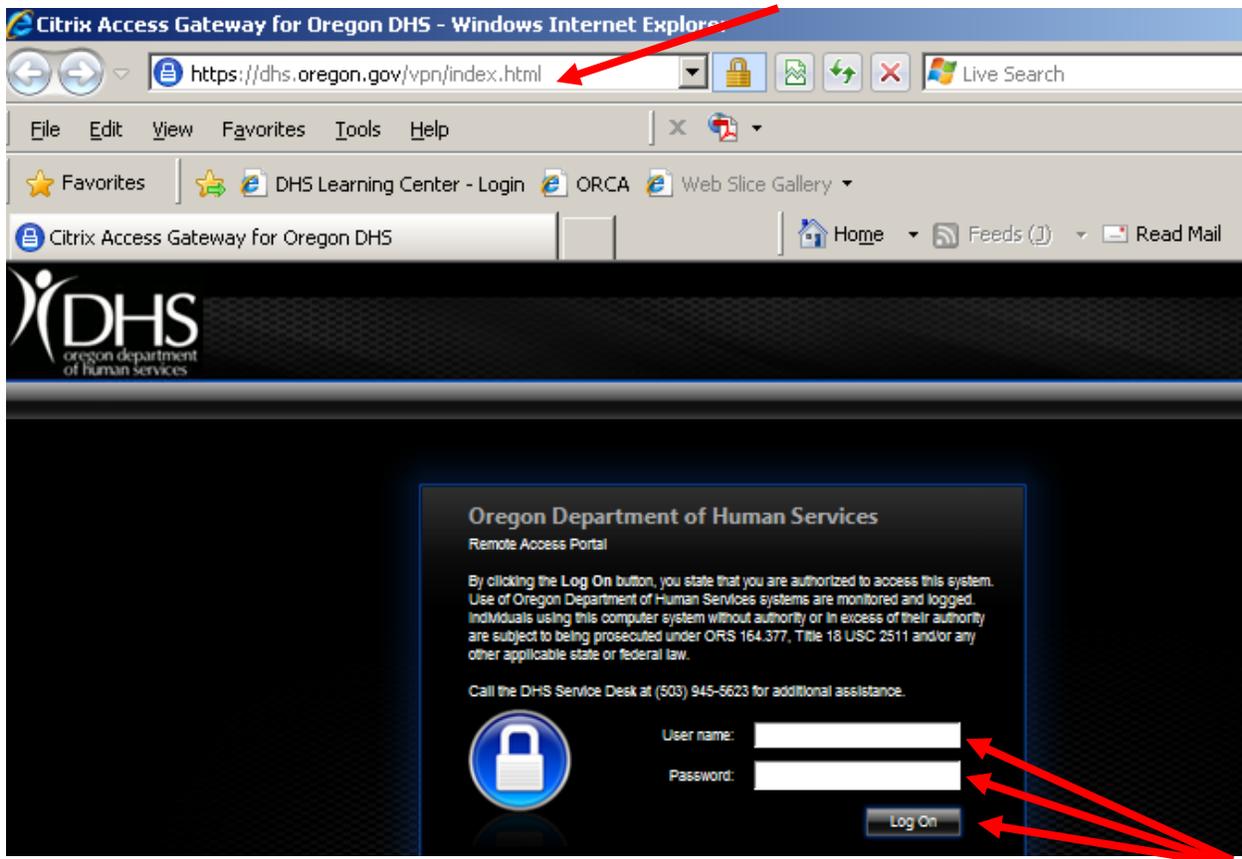
3. Type your Citix user name, which is also called your "p-number" or "partner number." Type your password. Click the Log On button.

Lesson 1: Logging into FamilyNet

4. On the Applications screen, click once on the FamilyNet icon:


5. The first time a computer connects to FamilyNet, the **ICA Client File Security** window opens. In the window, click **Full Access** and **Never ask me again for this application**, as shown below. Click the **[OK]** button. Normally, this window appears only once, so you will be able to skip this step during future logins.
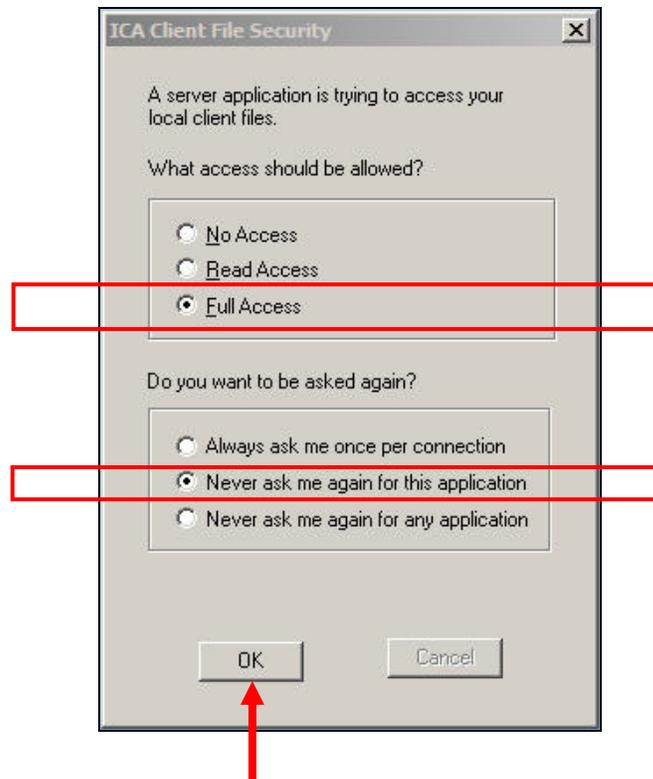
6. The FamilyNet login screen appears. Enter your FamilyNet **User ID** and **Password**. Click the **[OK]** button. If you do not have a FamilyNet User ID and Password, contact your local system administrator.

7. The **Select Modules** window appears. You are logged into FamilyNet. To close FamilyNet, click the **X** in the upper-right corner of the **Select Modules** window.
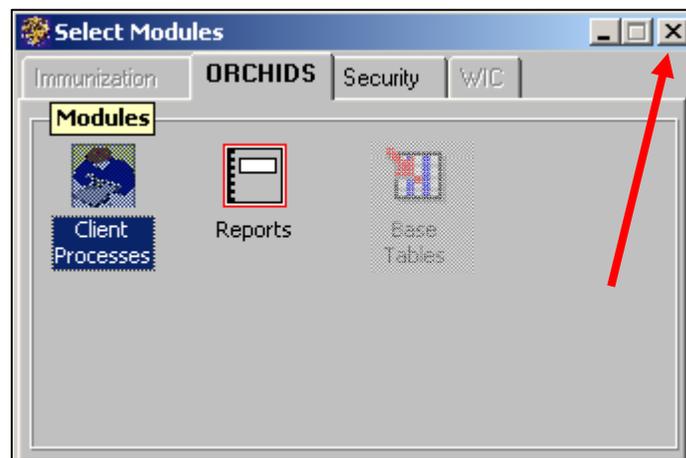
8. To close the **Citrix XenApp - Applications** window, click the **X** in the upper-right corner of the window.

Lesson 2: Adding a New User

A system administrator can:

- Add a new user
- Remove a user
- Edit information about a user's login, including the password
- Assign a security role to a user
- Remove an assigned security role from a user

To maintain security and confidentiality of client information, a local system administrator assigns each staff person a unique FamilyNet login ID and password, along with appropriate security roles that allow each staff person to access specific screens and functions.

Notes:

1. If you experience any problems in managing staff access to FamilyNet, contact ORCHIDS Application Support: orchids.app-support@state.or.us or 971-673-0382.

2. A local system administrator can maintain user access and roles that pertain only to his or her local agency.

3. If you need help logging into FamilyNet, see "Lesson 1: Logging into FamilyNet," page 3.

To add a new user:

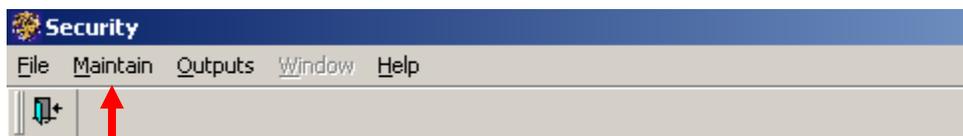1. In the **Select Modules** window, click the **Security** tab.

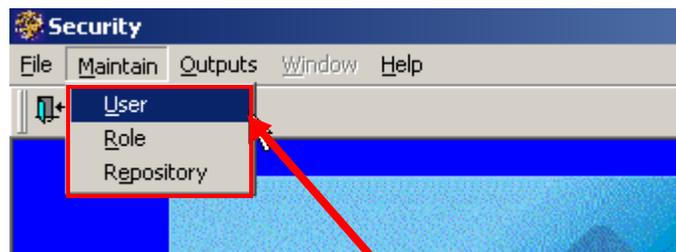**Select Modules window with Security tab selected**

2. Double-click the **Security Control** [icon] icon. The **Security** screen appears.

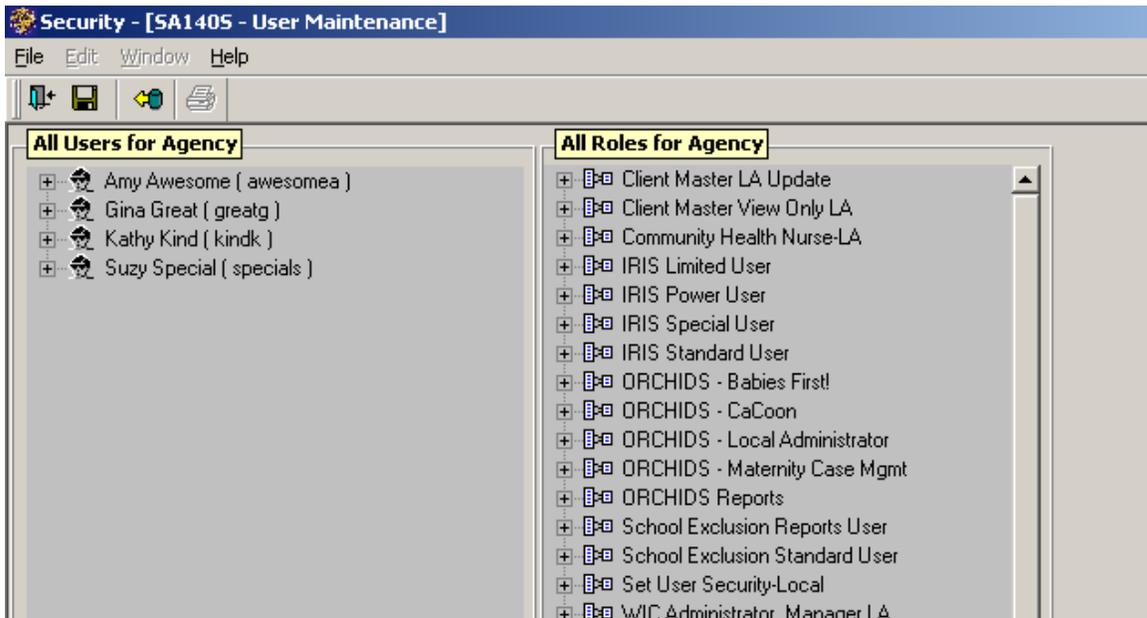3. In the **Security** screen, select **Maintain** from the menu bar at the top of the screen.

Then, select **User** from the drop-down menu that opens.

4. The **Security – [SA140S – User Maintenance]** screen appears.

Security - [SA140S - User Maintenance] screen

5. In the **Security – [SA140S – User Maintenance]** screen, right-click anywhere in the left column. A pop-up menu appears.

Security – [SA150S - User Maintenance] window with pop-up menu displaying

6. Select **Insert User** from the pop-up menu. The **SA150S - User - Insert** window appears.

SA150S - User - Insert window

7. In the **SA150S - User - Insert** window, in the **User ID** field, type the login ID for the new user.

    Notes:

    - If the user already has a local login ID in your agency's network, use that same login ID here.

    - To create a new login ID, use the first letter of the user's first name and the first seven letters of the user's last name. If this produces an ID already in the system, add a numeral after the final letter, or delete the final letter and insert a middle initial after the first initial.

8. In the **Name** field, type the user's full name.

9. In the **Password** field, type a temporary password for the user, which the user will reset after logging in the first time.

    Notes:

    - The password must contain 6-12 alphanumeric characters and begin with an alpha character.

    - Assign a temporary password to each new user and instruct them to change it the first time they log in.

10. In the **Confirm Password** field, retype the password.

11. Click the **[OK]** button.

Lesson 3: Editing an Existing User

Note: If you need help logging into FamilyNet, see "Lesson 1: Logging into FamilyNet," page 3.

1. In the **Select Modules** window, click the **Security** tab.

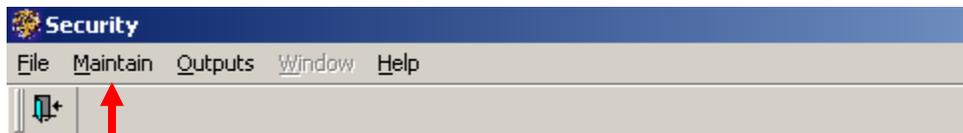**Select Modules window with Security tab selected**

2. Double-click the **Security Control** icon.
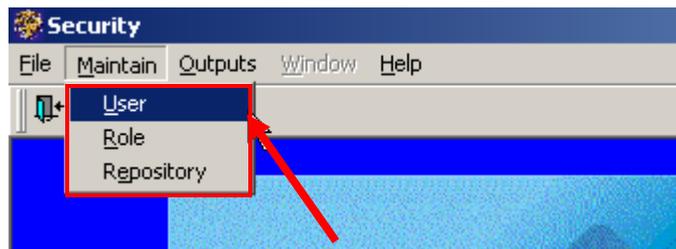
3. The **Security** screen appears.

Security screen

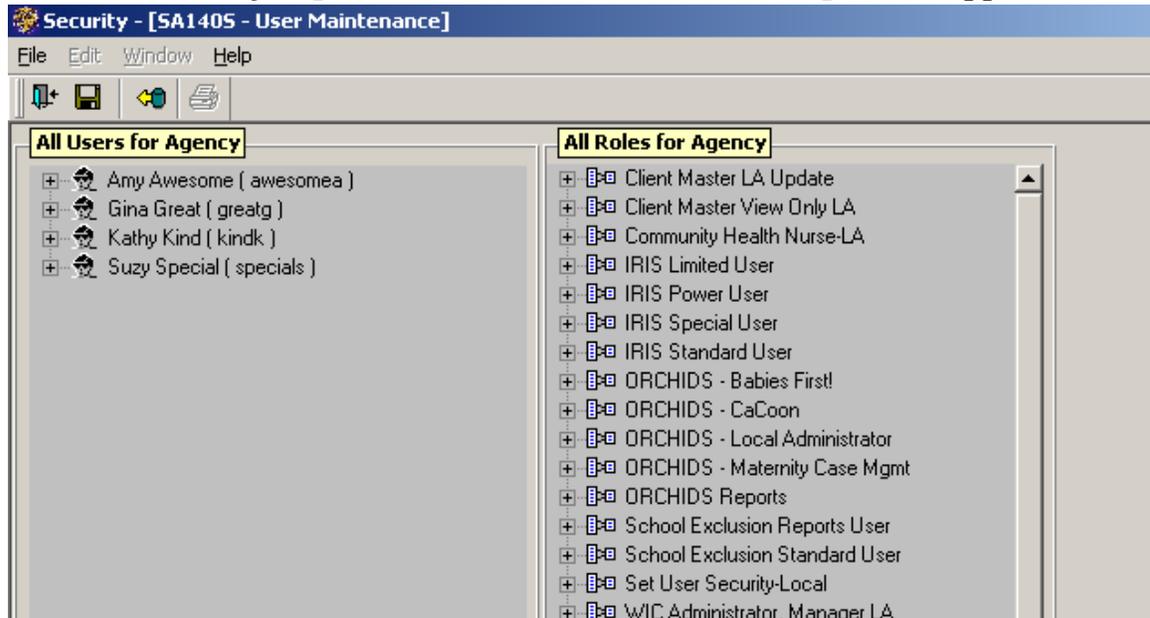4. In the **Security** screen, select **Maintain** from the menu bar at the top of the screen.

Then, select **User** from the drop-down menu that opens.

5. The **Security – [SA140S – User Maintenance]** screen appears.

Security - [SA140S - User Maintenance] screen

6. In the left column of the **Security – [SA140S – User Maintenance]** screen, right-click the name of the user whose information you want to edit. A pop-window appears. Select **Edit User**.
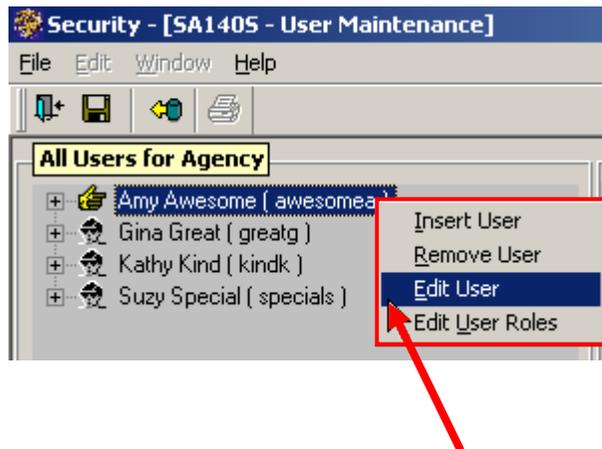
7. The **SA150S - User - Edit** window appears.
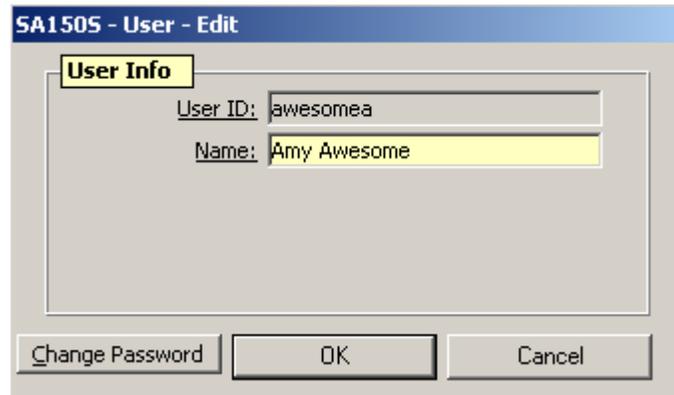
SA 150S - User - Edit window

8. In the **SA150S - User - Edit** window, click the **Name** field and type to edit the name.

Edited user name

9. Click the **[Change Password]** button in the **SA150S - User - Edit** window.

Lesson 3: Editing an Existing User

10. The **Change Password** window appears.
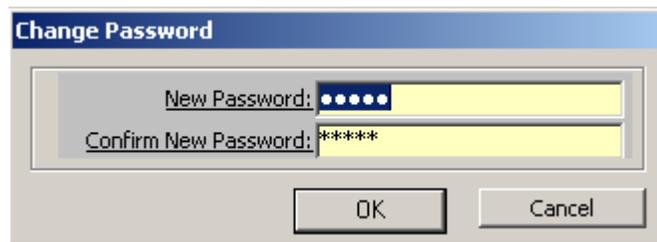
Change Password window

In the **Change Password** window, type the new password in the **New Password** field.

Notes:

- The password must contain 6-12 alphanumeric characters and begin with an alpha character.

- Assign the same temporary password for all password resets and instruct the user to change it at the next login.

11. In the **Confirm New Password** field, retype the new password.

12. Click the **[OK]** button to close the **Change Password** window.

13. A pop-up window appears that states the password has changed.

14. Click the **[OK]** button to close the pop-up window. The pop-up window closes.

Lesson 4: Assigning a Role to a User

Note: If you need help logging into FamilyNet, see "Lesson 1: Logging into FamilyNet," page 3.

1. In the **Select Modules** window, click the **Security** tab.
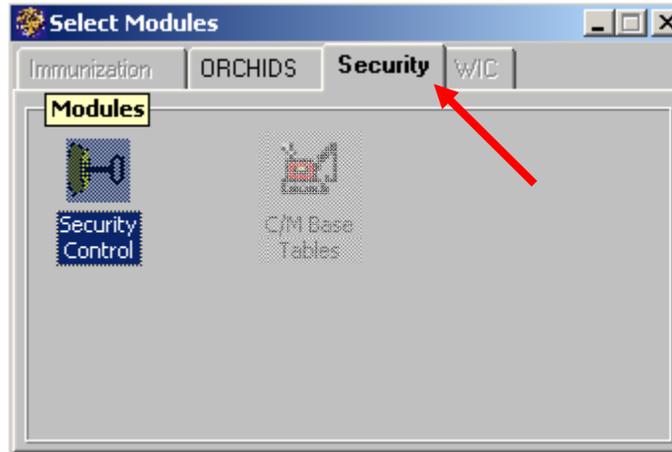
Select Modules window with the Security tab selected

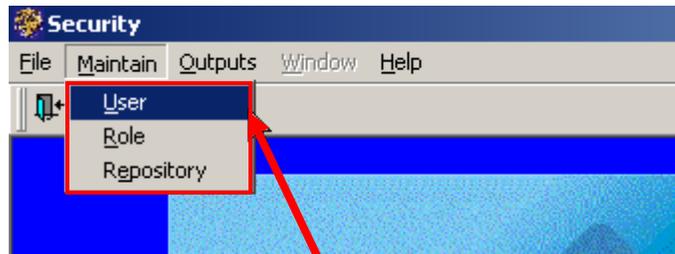2. Double-click the **Security Control** icon. The **Security** screen appears.

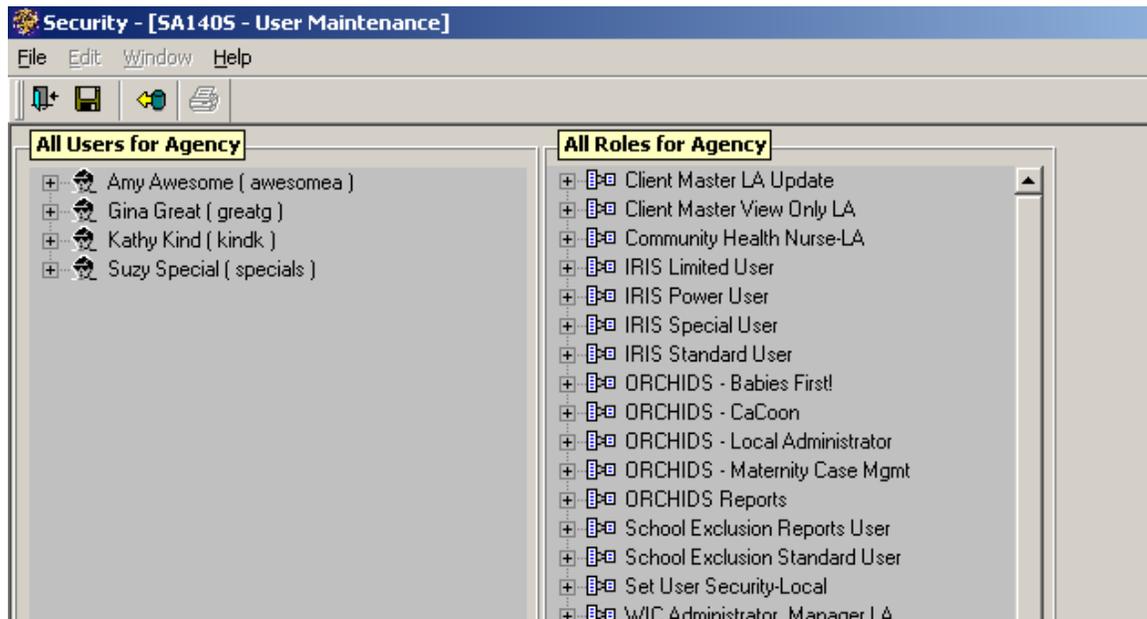Lesson 4: Assigning a Role to a User

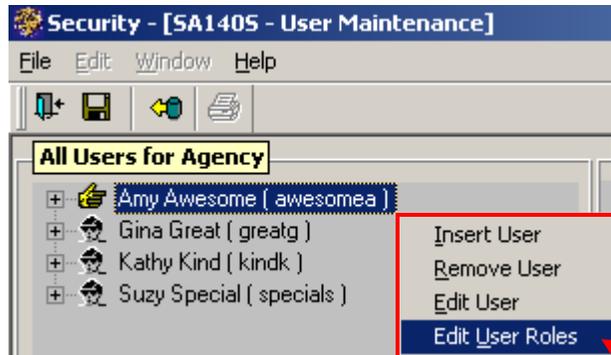3. In the **Security** screen, select **Maintain** from the menu bar at the top of the screen.
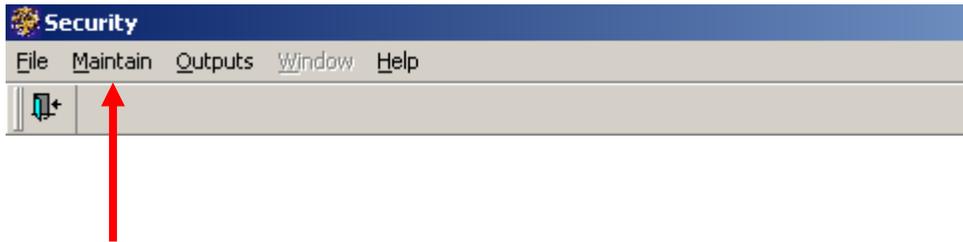
Then, select **User** from the drop-down menu that opens.

4. The **Security – [SA140S – User Maintenance]** screen appears.

5. In the left column of the **Security – [SA140S – User Maintenance]** screen, right-click on the name of the user that needs security roles added. A pop-up menu appears. Select **Edit User Roles**.
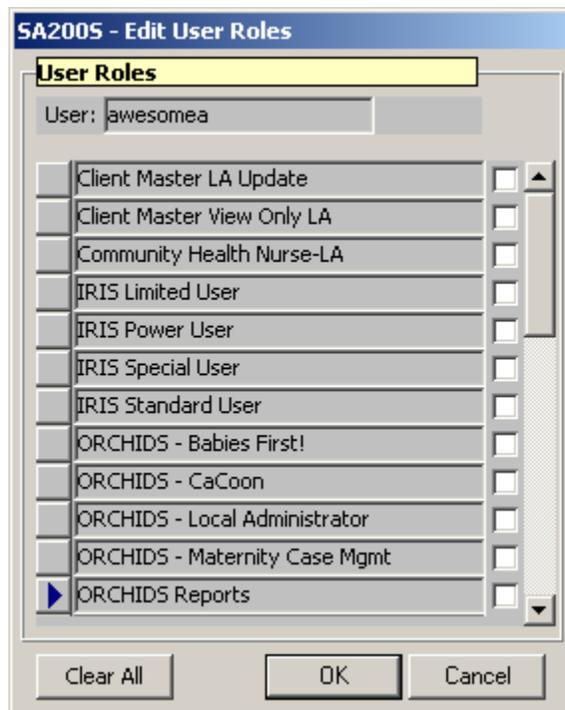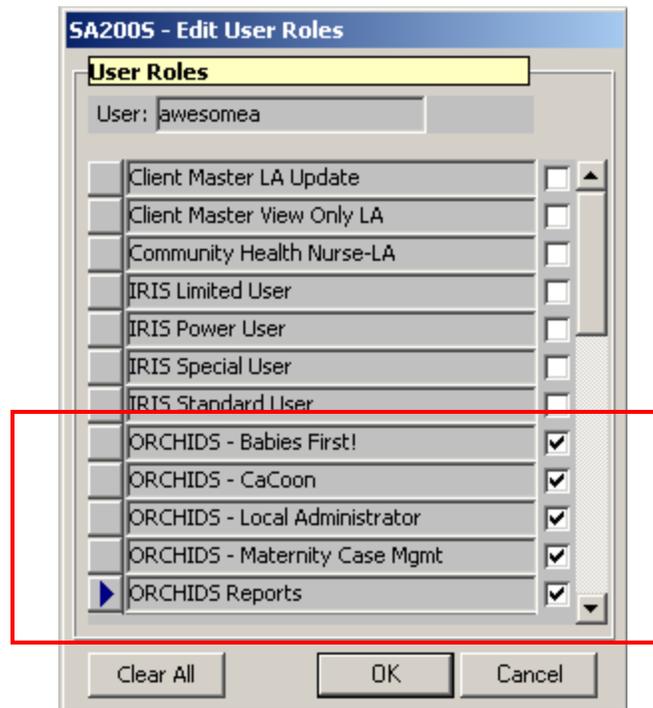
6. The **SA200S - Edit User Roles** window appears.

7. In the **SA200S - Edit User Roles** window shown below, all of the
   ORCHIDS roles are selected:

- ORCHIDS – Babies First!

  This role opens access to the data entry screens for Babies First.

- ORCHIDS – CaCoon

  This role opens access to the data entry screens for CaCoon.

- ORCHIDS – Maternity Case Mgmt

  This role opens access to the data entry screens for Maternity Case
  Management and Maternity-Other Program (MOP).

- ORCHIDS – Local Administrator

  Local system administrators always have this role. In some agencies,
  other users also have this role. Follow your local agency's policy
  regarding which users may have this role checked. Turning on this
  role for a user will activate the two deletion buttons on the Client Info
  tab. They are located in the bottom right corner of the Client Info tab
  and are named "Delete Case/Visit" and "Delete Billing." Users with
  the "ORCHIDS – Local Adminstrator" role can delete a visit that has
  not been billed to DMAP and/or a case with no billed visits. Users

with this role can also delete a billing claim that has not transmitted to DMAP yet (i.e., a pending claim) or a claim that errored during billing processing.

- ORCHIDS – Reports

  This role opens access to ORCHIDS Reports. Follow your local agency's policy regarding which users may have access to ORCHIDS Reports. In some agencies, this role is not granted to all users. Any user that reconciles billing claims will need this role in order to generate a Billing Report.

8. Click the **[OK]** button to confirm the changes.

9. Click the **Save** icon in the toolbar at the top of the screen to save the changes.

Lesson 5: Removing a User Role

Note: If you need help logging into FamilyNet, see "Lesson 1: Logging into FamilyNet," page 3.

1. In the **Select Modules** window, click the **Security** tab.

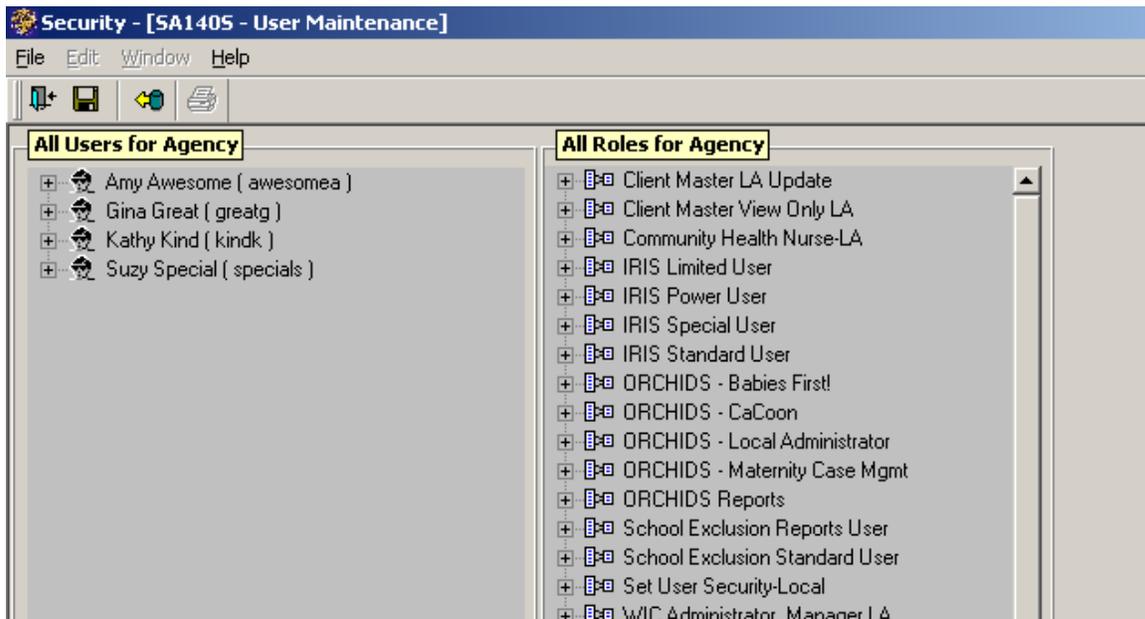2. Double-click the **Security Control** icon. The **Security** screen appears.

3. In the **Security** screen, select **Maintain** from the menu bar at the top of the screen.

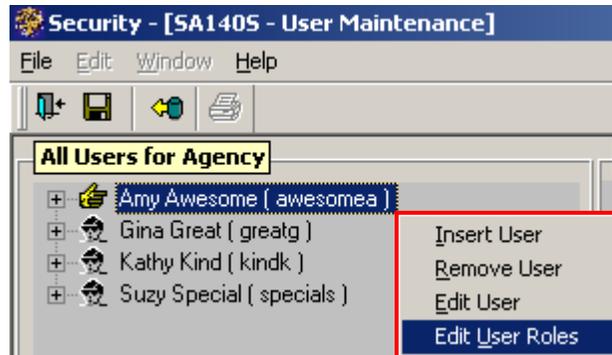Then, select **User** from the drop-down menu that opens.
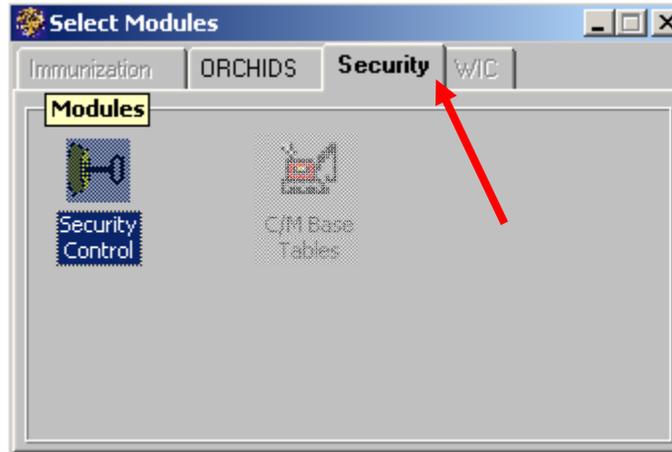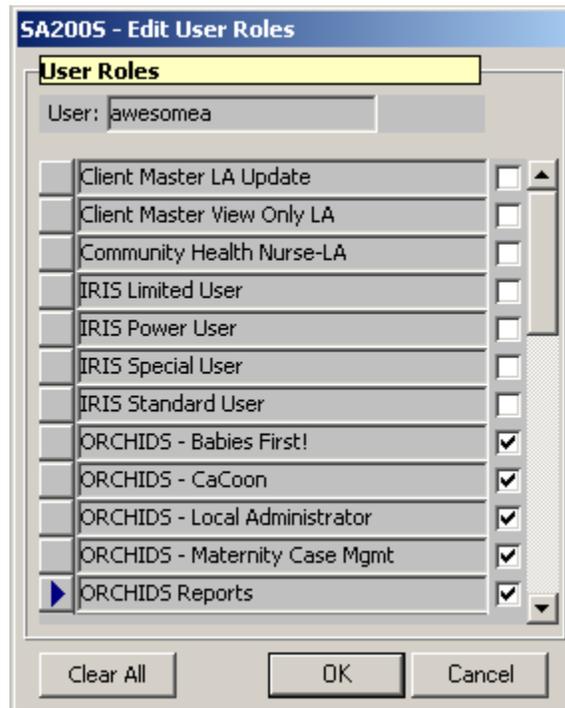

4. The **Security – [SA140S – User Maintenance]** screen appears.

Lesson 5: Removing User Role

5. In the left column of the **Security – [SA140S – User Maintenance]** screen, right-click on the name of the user that needs security roles added. A pop-up menu appears. Select **Edit User Roles**.
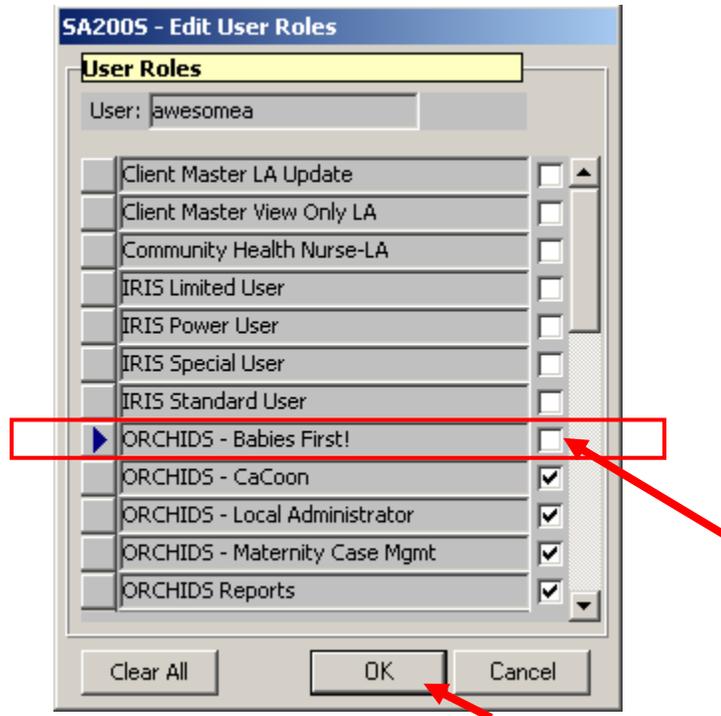

6. The **SA200S - Edit User Roles** window appears.

SA 200S - Edit User Roles window

7. In the **SA200S - Edit User Roles** window, click on the checkmark to the right of the role you wish to remove. In the picture below, the ORCHIDS – Babies First! role is no longer checked. This means the user will no longer be able to access the Babies First data entry screens.

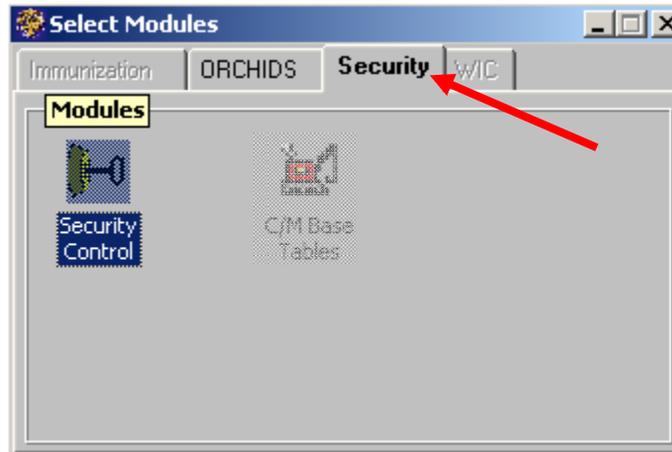8. Click the **[OK]** button at the bottom of the window to confirm the changes.

9. Click the **Save** icon in the toolbar at the top of the screen to save the changes.

Lesson 6: Removing an Existing User

Note: If you need help logging into FamilyNet, see "Lesson 1: Logging into FamilyNet," page 3.

1. In the **Select Modules** window, click the **Security** tab.

Select Modules window with the Security tab selected
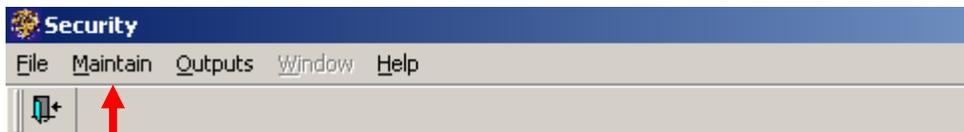
2. Double-click the **Security Control** icon.
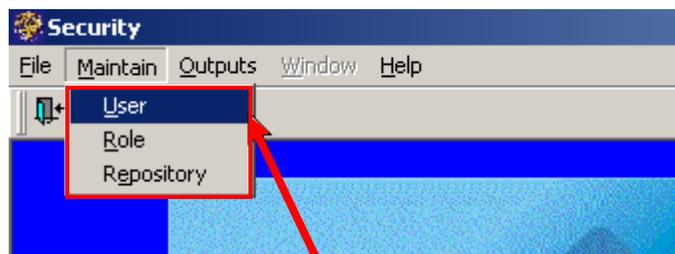
3. The **Security** screen appears.

Security screen

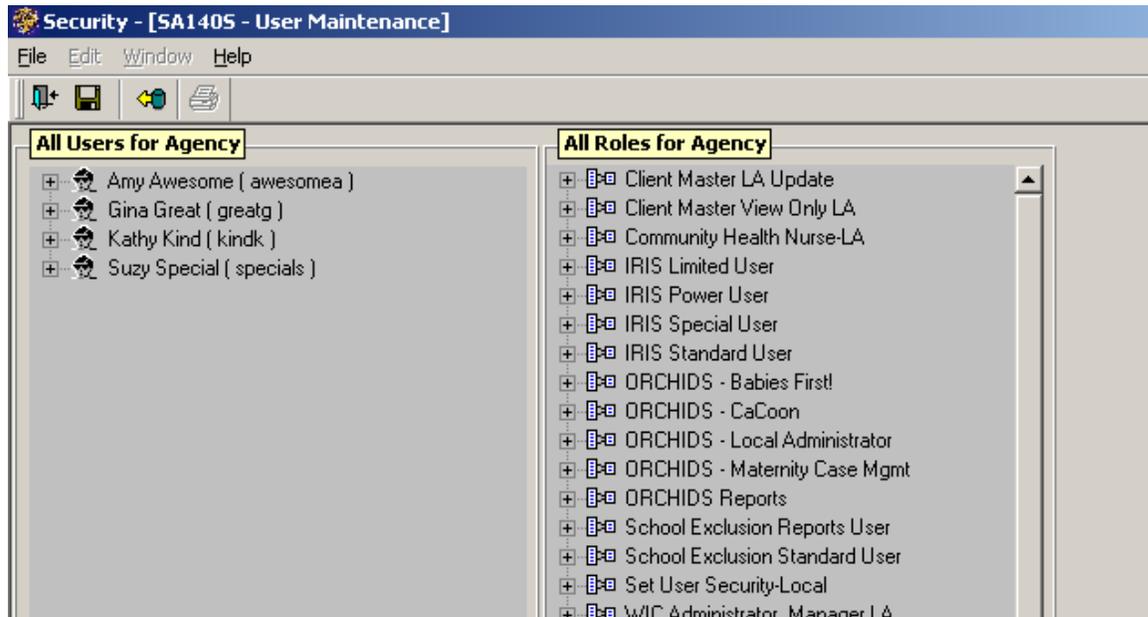4. In the **Security** screen, select **Maintain** from the menu bar at the top of the screen.

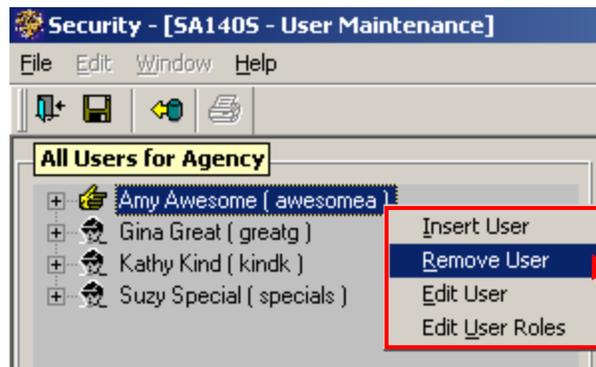Then, select **User** from the drop-down menu that opens.

5. The **Security – [SA140S – User Maintenance]** screen appears.

Security – [SA140S – User Maintenance] screen

6. In the left column of the **Security – [SA140S – User Maintenance]** screen, right-click on the name of the user you want to remove. A pop-up menu appears. Select **Remove User** on the pop-up menu.

Note: Before you can remove a user's login, you must remove the user's roles. If you need help removing the user's roles, see "Lesson 5: Removing a User Role," page 20.

7. The **SA150S - User - Remove** screen appears. Verify you have
    selected the correct **User ID** and **Name**.

8. Click the **[OK]** button to remove the user. The pop-up window closes.