# FACSPro System Admin

## What does that mean?

### May 10, 2017

**System Admins Session**

*What does it mean to be a FACSPro System Administrator? This session will focus on the responsibilities of the CAA System Administrator (Full Access user). It will cover the tasks required to create and maintain both program and staff setups within the system, discuss how client transfers effect reporting, and provide tips for troubleshooting and making FACSPro easier to maintain and more efficient for end-users.*

# What is a System Admin?

A system admin is a CAA staff person or multiple staff people identified to be the lead setup, support, and training person for FACSPro at their agency. They are identified within FACSPro as having the Full Access user security level.

# What is a System Admin Responsible for?

- Ensure the accuracy of data entered into FACSPro
- Train staff on how to use FACSPro in your agency
- Troubleshoot issues internally
- Serve as the Agency contact to the FACSPro help desk
- Set up new users
  - Set the proper security level
  - Grant users Access Rights
- Manage existing agency programs (active/inactive)
  - Create Agency Programs
  - Verify program eligibility annually
  - Ensure action plan templates are accurately setup to meet agency needs annually
  - Set up funding sources
- Maintain Vendor lists for your agency
- Update Area Median Income annually
- Manage customer transfer requests (recommended to enable auto transfer)
- Remove duplicated clients from FACSPro (not reversible)

# Ensure the accuracy of data entered into FACSPro

## How can this be done?

Run reports on a regular basis (weekly, monthly, quarterly) to identify incomplete or irregular records.

<u>Some examples include</u>:

- ❖ Run an ad-hoc report that shows the number of family types identified as Single person (living alone) but the number of household members is greater than 1.
  - ❖ Or a family type that has no children but the number of children in the household is greater than 0.
- ❖ Run a report that looks at individuals at 0% FPL but not marked as zero income sources.
- ❖ Run a report on closed action plans without an indicator selected.
  - ❖ Or a report that shows action plans with indicators completed but the action plan is not closed out.

# Train staff on how to use FACSPro in your agency

## How does your agency do this currently?

Each agency has their own processes for what operations different staff levels perform for the different programs that they operate so there is not a one size fits all for all staff at all agencies.

Some agencies use formal process manuals.

We are trying to create a generic how to manual for the different modules and features of FACSPro. (With NextGen coming this has created some new obstacles)

*Optional Tips*:

- *MCA has found that when they are training frontline staff that if you show them how the information is used to roll up into reporting they are able to see the value in the accuracy and completeness of the information being asked.*
- *Giving access to the test site so that staff can interact with the system without fear of "messing up" has proven beneficial to help with retention.*

# Troubleshoot issues internally

## Tips

Does the problem only occur for one user?

- It is likely a user security level or access rights to a program
- Also make sure that user is on the most current update of FACSPro
  - All users should be accessing FACSPro by using the AutoUpdate.exe file
  - Always download the most recent setup file from DBA (milivev2.dbafacspro.com (live version) or mitestv2.dbafacspro.com(test version))when installing FACSPro on a machine.

FACSPro won't open or gives an error.

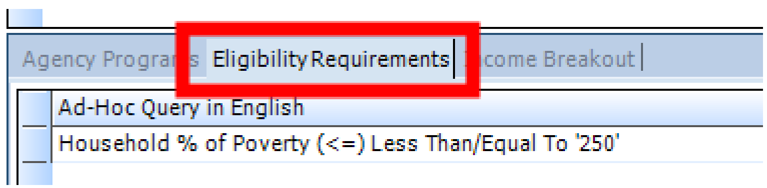
- If you are having this problem agency wide then the server may be down, contact the helpdesk.
  - If not then it is likely being blocked by an anti-virus program or firewall.
    - Firewall should allow all traffic on port 80 to DBA's external IP: 173.49.105.111
    - Anti-Virus should be allowing application activity in the DBA folders.
    - Users should also have full rights to the DBA folder(s) (default paths):
      (Live Data) C:\DBATECHSOFT\DBAFACSPRO_MI_LIVE_V2
      (Test Data) C:\DBATECHSOFT\DBAFACSPRO_MI_TEST_V2

# Troubleshoot issues internally (cont.)

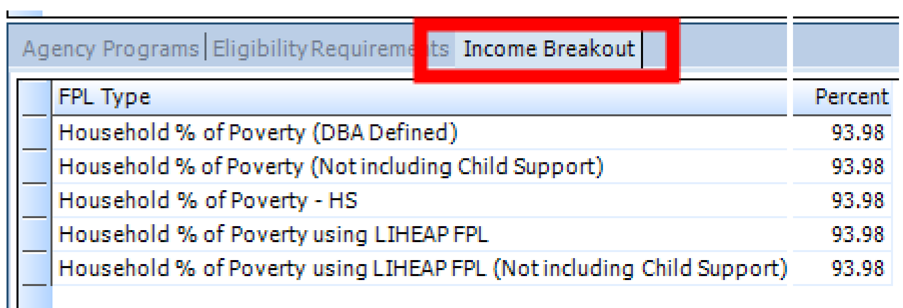
## Tips

For client eligibility issues:

- Review the actual eligibility setup for the program in question
    - This can be seen at the bottom of the [General] » [Programs] section on the [Eligibility Requirements] tab after you click on the program you are trying to enroll the client in.




    - For programs that use a special income calculation the calculated income level can be viewed on the [Income Breakout] tab.



# Troubleshoot issues internally (cont.)

## Tips

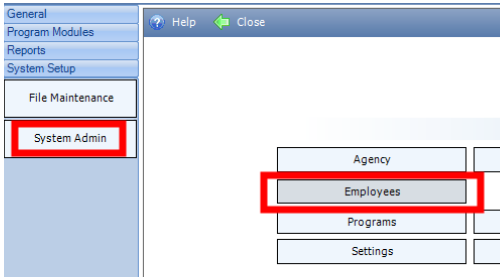
AwardPro issues:

- Award maximums apply to the effective period of the active grant for that program.
    - Make sure to lock grants when they are done and to create new grants for each program year.
    - Only one grant should ever be active for an agency program.
- Make sure the agency program is setup under the CAA program access tab in the funding source screen for the grant that is trying to be used.

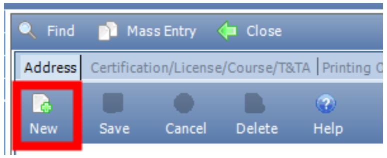
# Set up new users

**Before you can create a user they must be setup as an employee in FACSPro.**

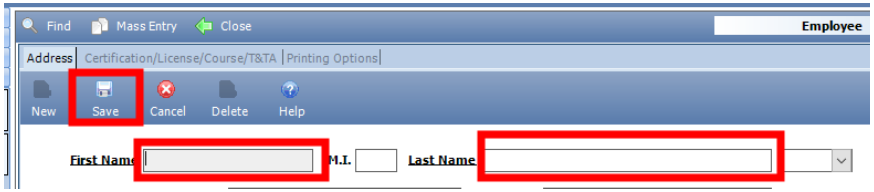
Go to [System Admin] » [Employees]




Click [New]

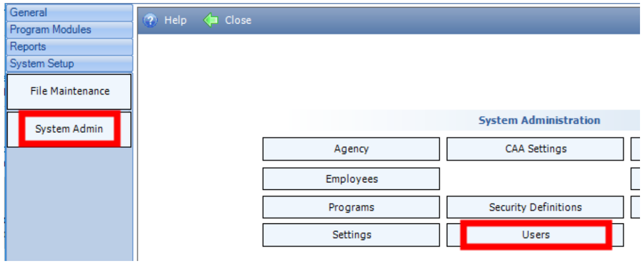



Fill in at least the first and last name.
Click [Save]

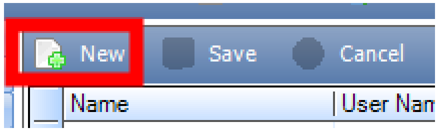


# Set up new users (cont.)

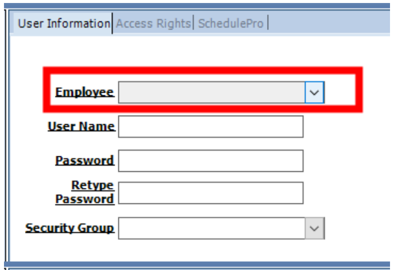
Now that the user is entered as an employee you can create a login name, password and assign them a security level and access rights.



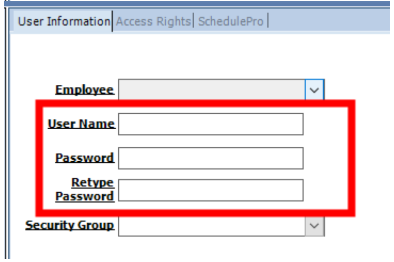

Go to [System Admin] » [Users]




Click [New]



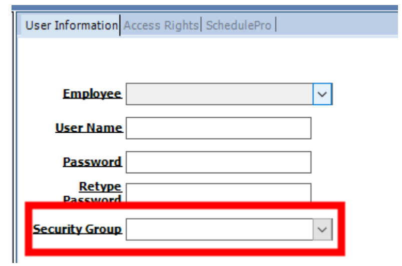

Select the employee from the drop-down list




Create a user name and password

# Set up new users (cont.)

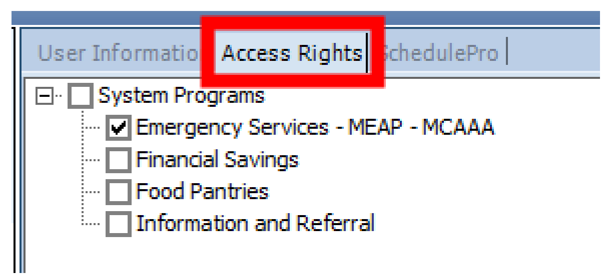
Now that the user is entered as an employee you can create a login name, password and assign them a security level and access rights.




Select the appropriate security group
*To view what each security group has access to go to [System Admin] » [Security Definitions]*

Click [Save]


On the Access Rights tab check off all of the System Programs that the user should be granted access to.



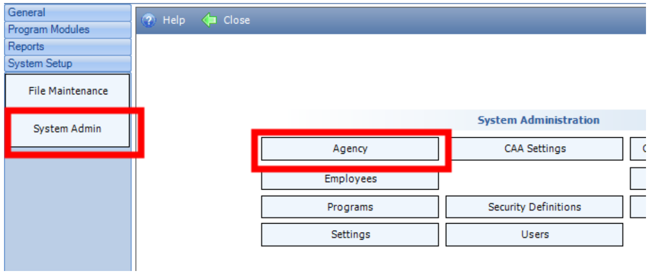
# Managing Agency Programs

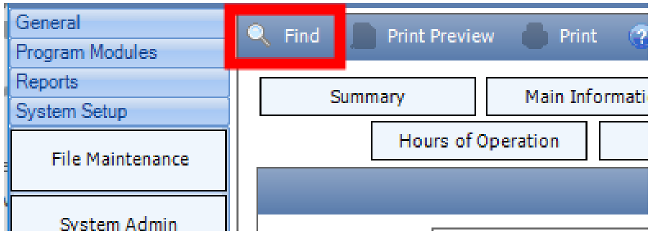
Go to [System Admin] » [Agency]

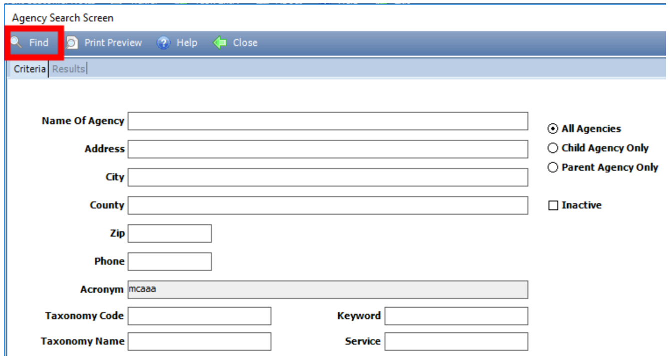
Click on the [Find] button at the upper left of the screen.

In the search screen that pops up enter some information to find your CAA and then click [Find].

*If you don't enter any search information in before click [Find] it will return a list of all agencies that have been entered into FACSPro.*



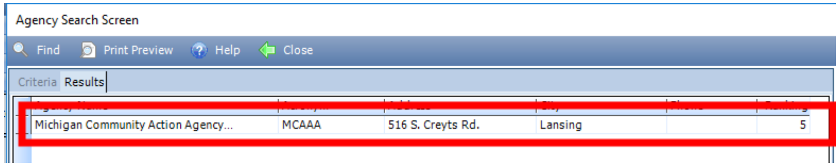



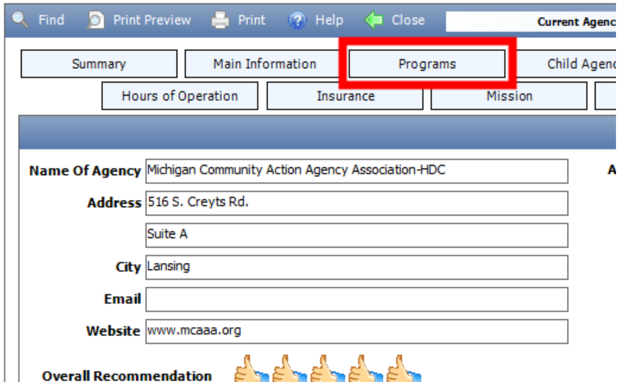
# Managing Agency Programs (cont.)

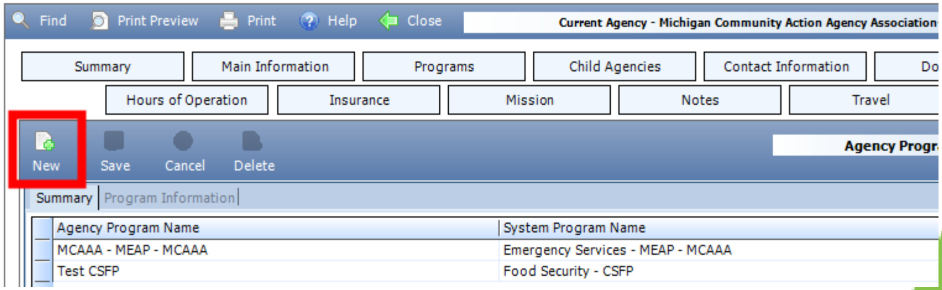
In the search results screen double click on your agency.

This will bring up the information of your agency. Click the [Programs] button at the top to bring up a list of the agency programs for your agency.

To create a new agency program click the [New] button.



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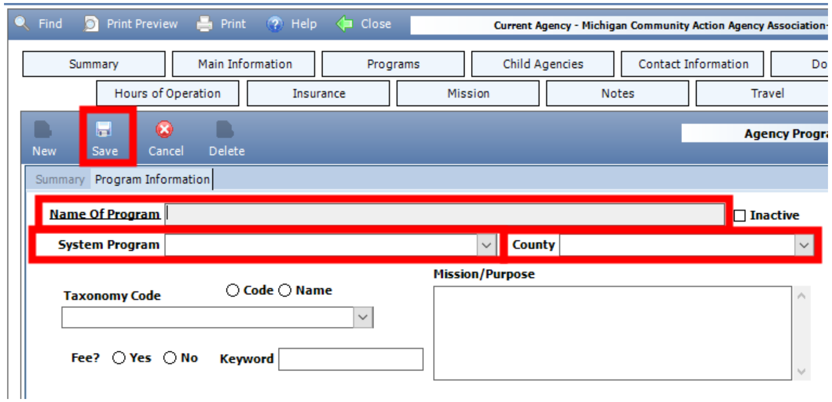
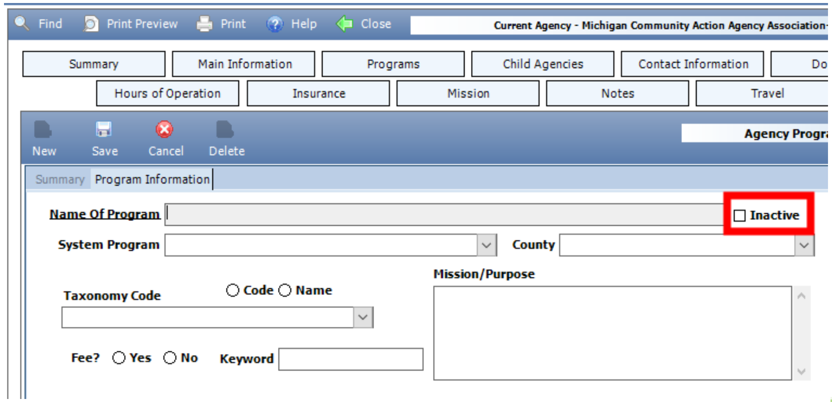
# Managing Agency Programs (cont.)

The system will redirect the [Program Information] tab, this is where the program setup is done. Enter the name of the program and from the "System Program" drop-down list select the System Program that the program will be connected to.
*(This is where the eligibility and action plans get connected)*




*The "County" drop-down list can be used if this program needs to be limited to a specific county. __**If** it is offered in multiple of your counties **LEAVE THIS BLANK**__.*




Lastly there is an "Inactive" checkbox that is used to inactivate a program so that no new actions can be done under that program.

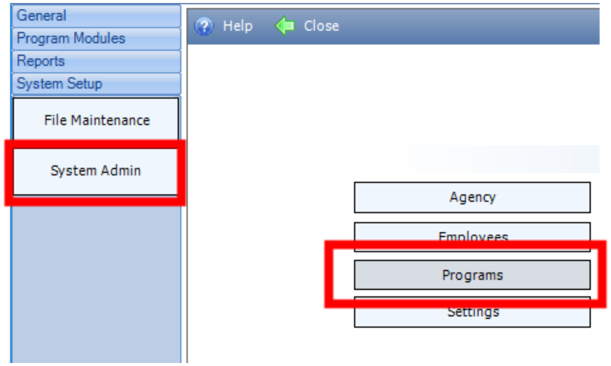
# Verifying Eligibility Setup

Program eligibility is set at the System Program level not at the Agency Program level.

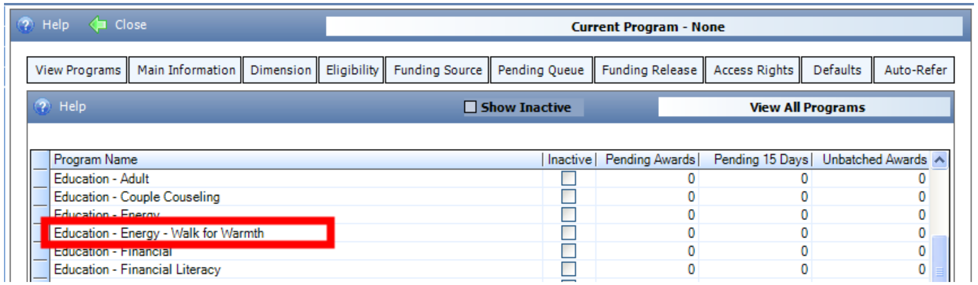
- If more than one eligibility is set for the same System Program and the client meets one of the setups then all Agency Programs linked to that System Program will appear as eligible.
- If there is an eligibility setup with your CAA name then that is the one that FACSPro uses for your CAA.
- If there is no setup for your CAA then FACSPro will use the one that is identified as the default.
- If there is none with your CAA name or one created as a default then there is not one setup that your CAA can use.

# Verifying Eligibility Setup (cont.)

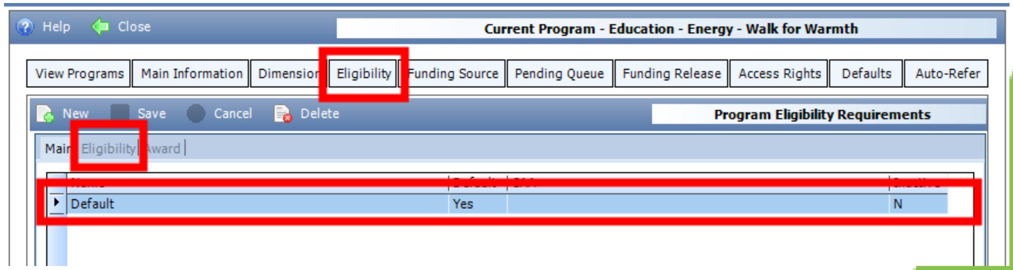
Go to [System Admin] » [Programs] then double click the System Program.




Click on the [Eligibility] button at the top and select the eligibility with your CAA name or the one labeled default if there is not one for your CAA.

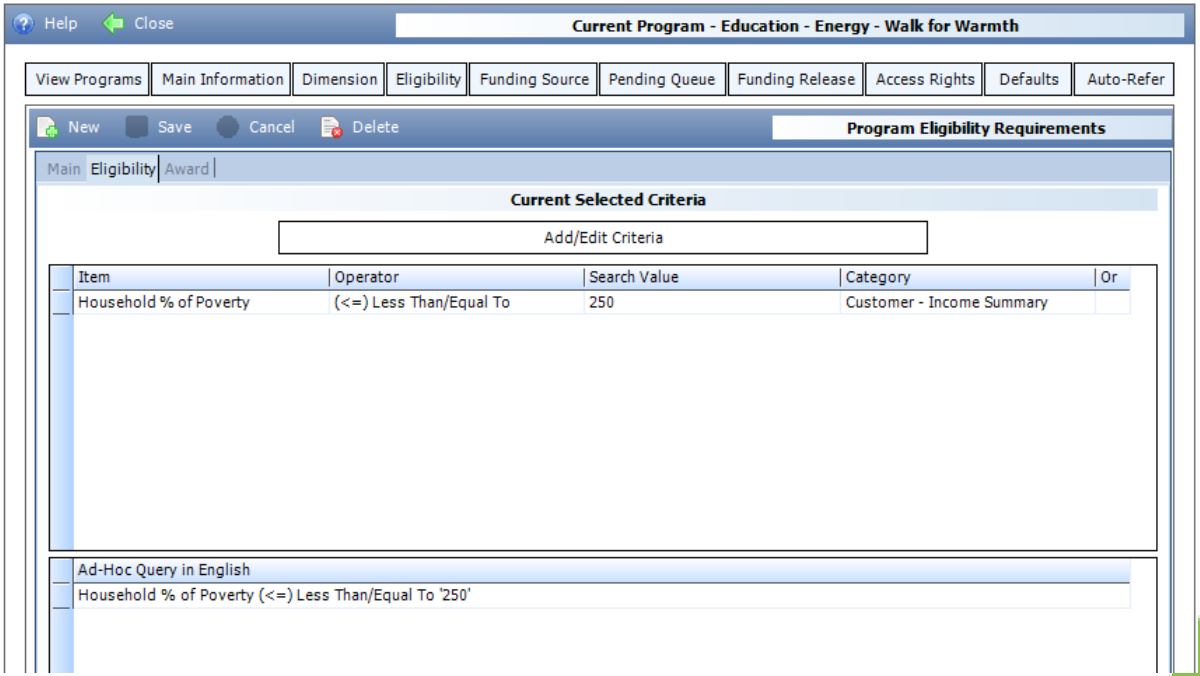



Click on the [Eligibility] tab to view the setup.



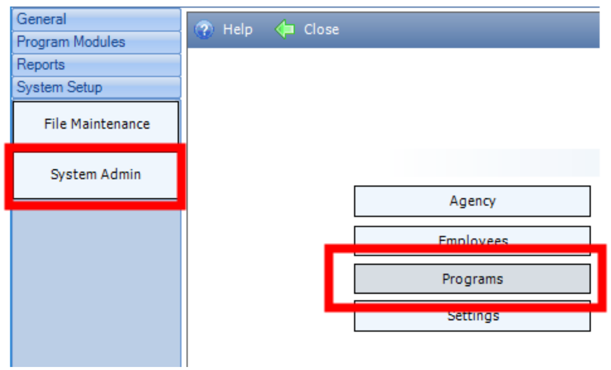
# Verifying Eligibility Setup (cont.)

If you need a change to the eligibility setup for your agency contact the help desk and let them know what system program you need adjusted and what the change is.

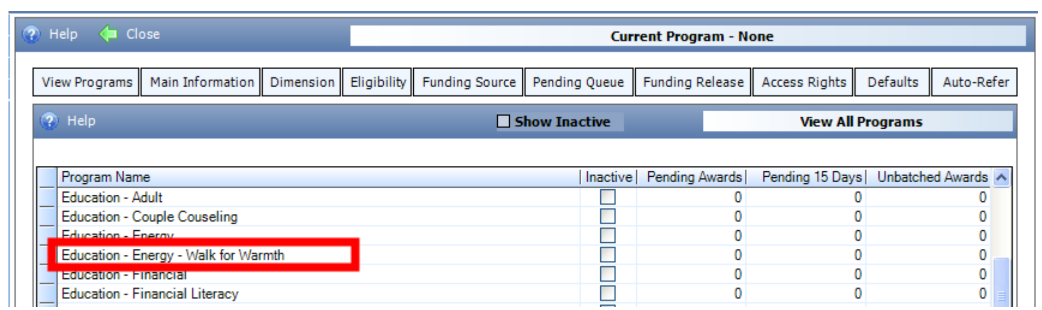


# Action Plan Setup

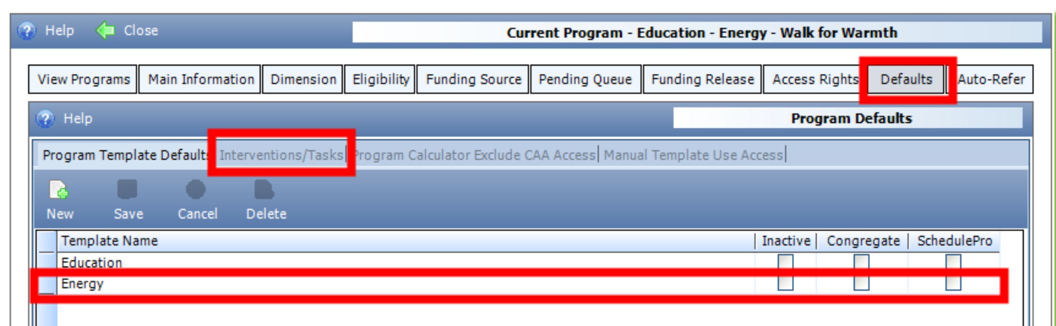
Go to [System Admin] » [Programs] then double click on the system program.




Click on the [Defaults] button to show the list of different action plans that have been setup for that system program.




Select the action plan template that you want to look at and click the [Interventions/Tasks] tab to view the setup of that action plan.

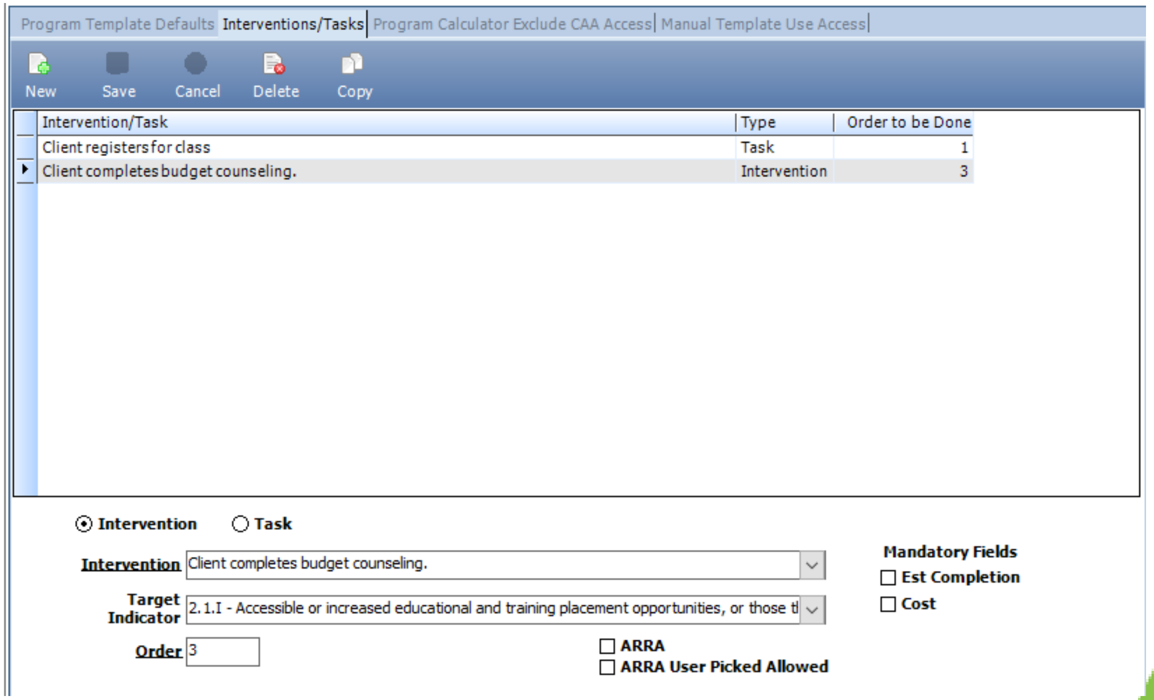


# Action Plan Setup (cont.)

All of the tasks and inventions will be displayed.

If you need a change to the action plan email the helpdesk with the system program, action plan template name, and the change(s) that you need.

*Intervention indicators are what are used for reporting values on the IS Report.*



# Action Plan Setup (cont.)

## Tips:

Action plan tasks are not used for any part of the IS Report or any other System Reports. They do allow the flexibility to track additional information if CAAs want to. Interventions are the important items that roll up into the IS Report.

If there are tasks on an action plan that your CAA is not using then have those tasks removed from the action plan. The fewer items that staff have to look/click through the more efficiently they can move through the system and processes.

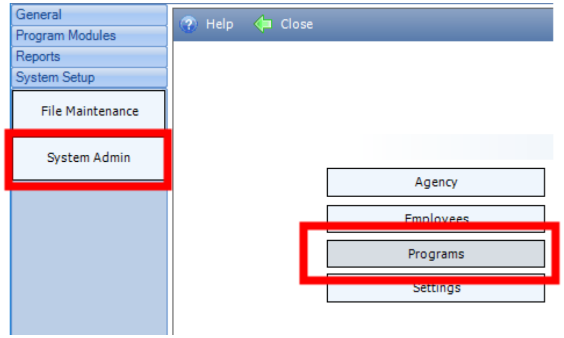
If there are things that your CAA wants to collect then talk to the help desk and determine the best way to collect that information so that it can be collected efficiently and reported back out easily.

Review your action plan setups at least once a year.

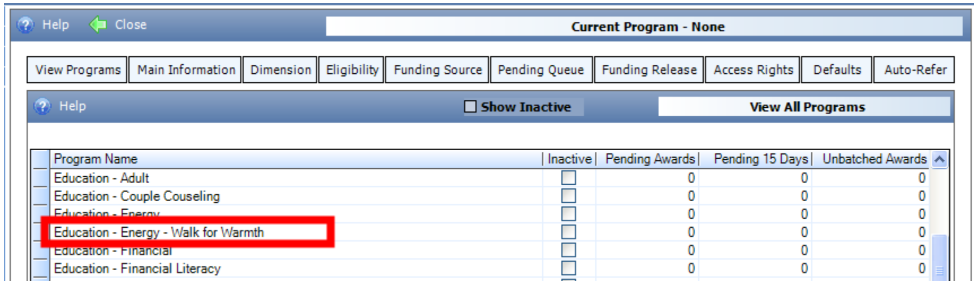
If your CAA has action plan options when enrolling a client in a program that you do not want to use/see contact the help desk and tell them which ones you want to be blocked.

# Setup Funding Source for AwardPro

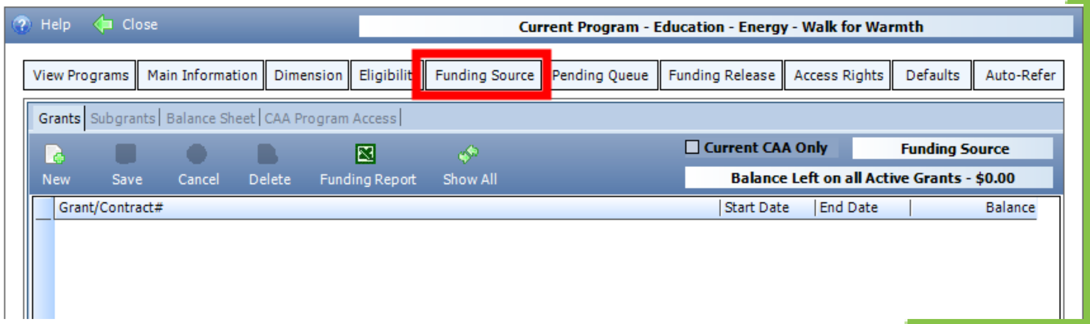
Go to [System Admin] » [Programs].




Scroll through the list and double click on the system program that you need to setup a grant for. (Only the system programs that you have any agency program connected to will appear in the list. To see the full list use the drop-down list at the top to select "All".

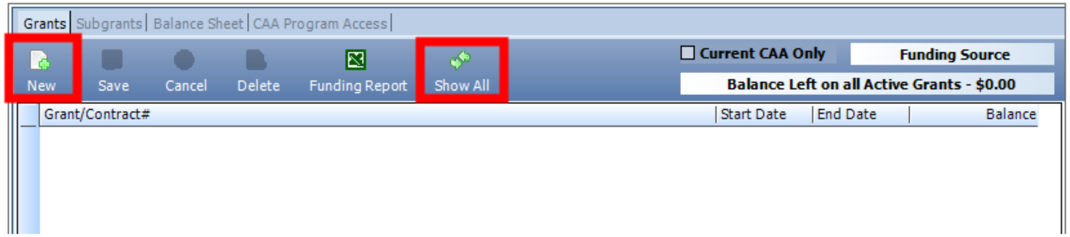



Next click on the [Funding Source] button at the top.

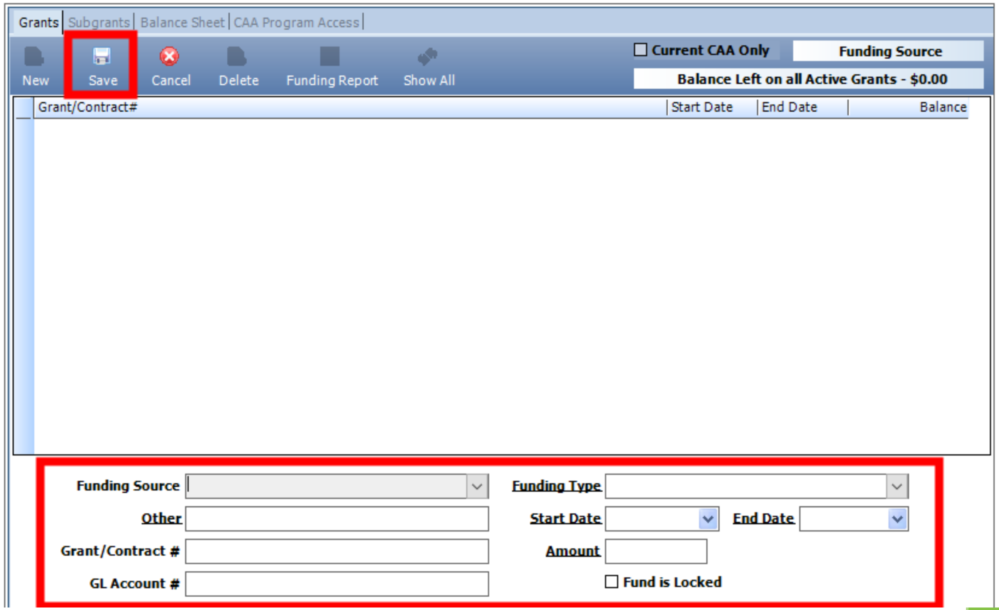


# Setup Funding Source for AwardPro (cont.)

A list of all of your current grants will appear (if today's date falls within the grant term), to see all of the grants that have been setup for this system program click [Show All]. To create a new grant click [New].




Enter the information at the bottom of the screen and click [Save]. The "Grant/Contract #" is what will appear as the name in this list. The start and end dates determine when this funding will be available in AwardPro as well as the time period for AwardPro to use to check for duplicate payments.



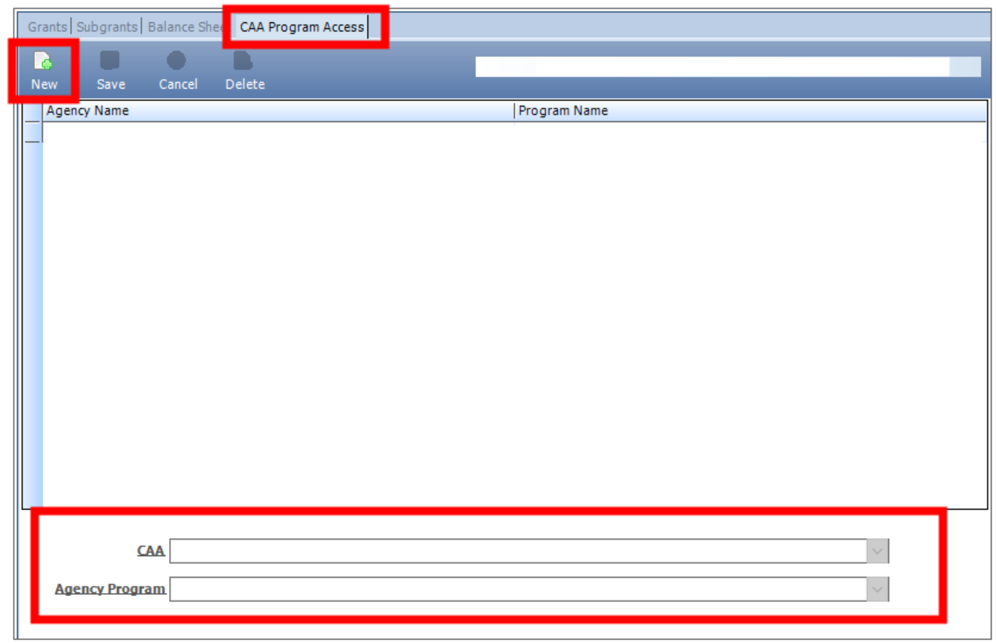

The "Fund is Locked" checkbox needs to be checked when you are done with that grant for the grant period.

# Setup Funding Source for AwardPro (cont.)

After the grant has been saved, the agency program(s) that will be given access to this grant must be selected on the [CAA Program Access] tab.

Click [New] and select your CAA and Agency Program from the drop-down list.

Click [Save]

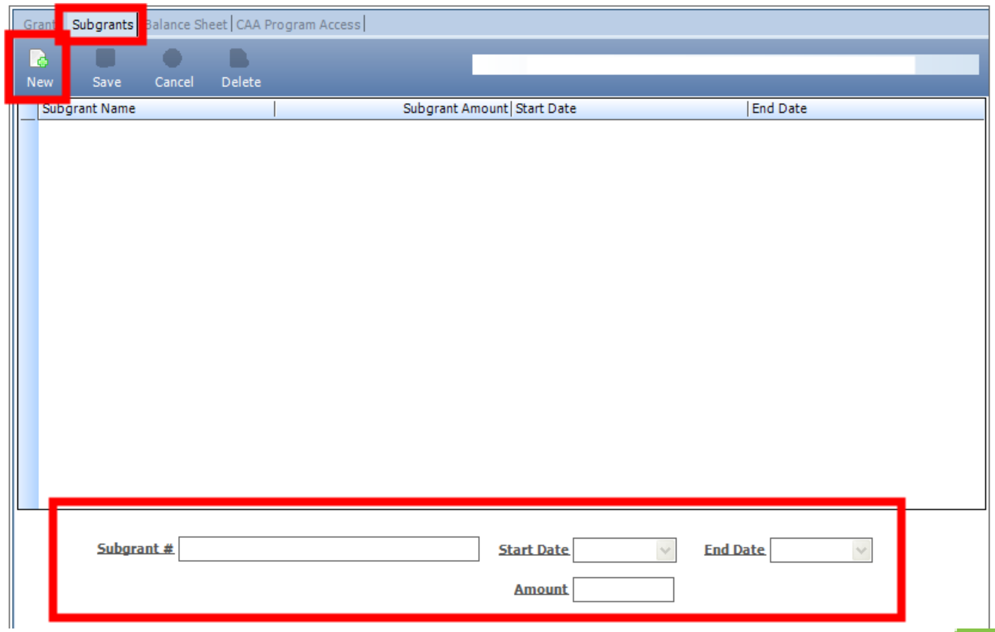


# Setup Funding Source for AwardPro (cont.)

If changes need to be made to the grant's funding amount (increase or reduction) it should be done on the [Subgrants] tab.

To make a change click [New] and then enter the information at the bottom and click [Save].

Using the sub grant feature it will provide a historical record of the changes that were made to the original amount and the date that they occurred.



# Setup Funding Source for AwardPro (cont.)

At the end of the grant term System Admins need to go in and lock the grant to prevent errors within the system for the next grant year.

If there are more than one unlocked grant for the same agency program then the system will present you with an error message when trying to create an award.

## CREATE NEW GRANTS FOR EACH YEAR.

**DO NOT CHANGE THE GRANT INFORMATION FROM THE GRANT FOR THE PREVIOUS YEAR. THIS WILL CAUSE YOU UNEXPECTED DIFFICULTIES AND WILL CAUSING PROBLEMS WHEN TRYING TO BALANCE YOUR GRANTS WITHIN FACSPro.**

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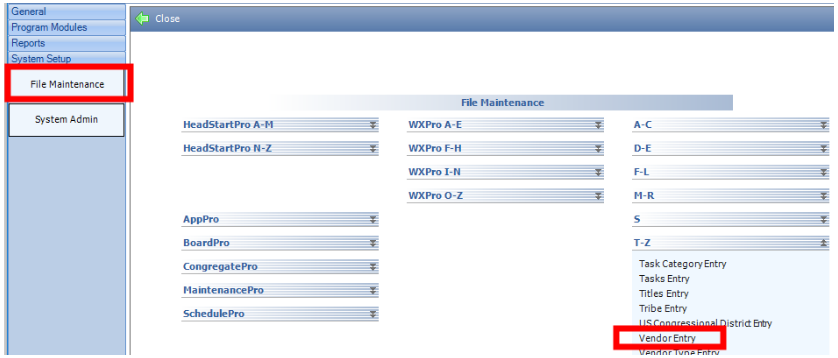
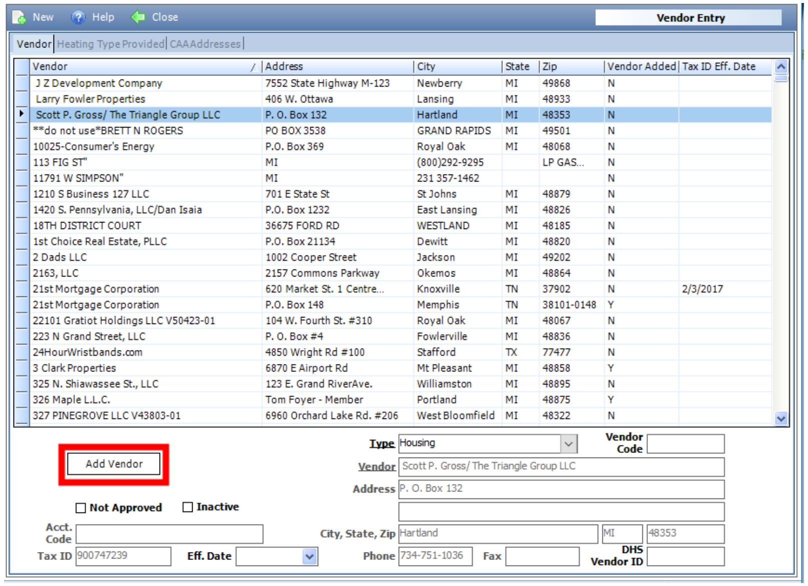
# Vendor Setup

Go to [File Maintenance] » [T-Z] » [Vendor Entry]

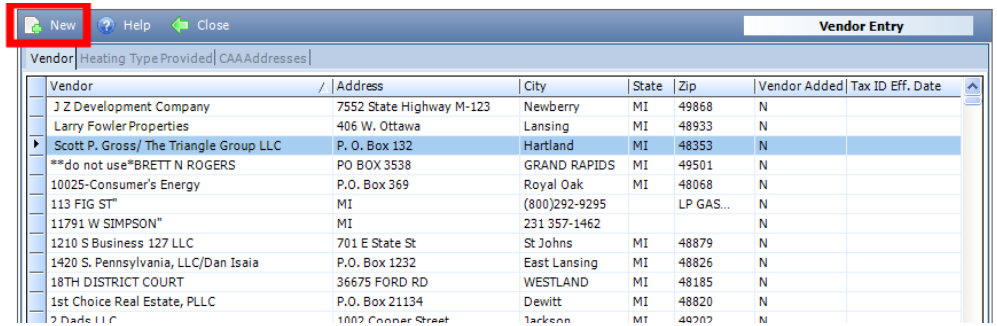
If the vendor has already been entered into FACSPro then select the vendor and click the [Add Vendor] button in the lower left of the screen.



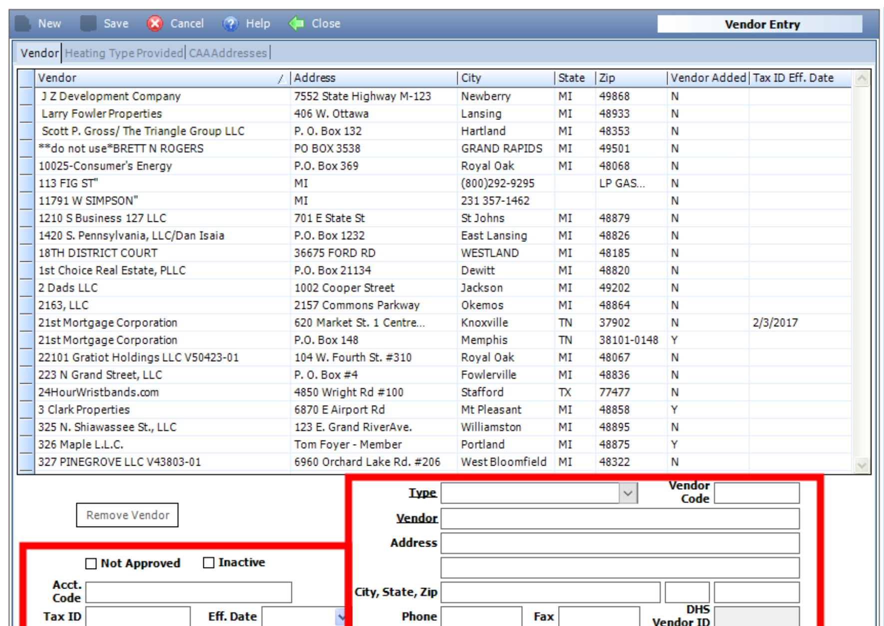



# Vendor Setup (cont.)

If the vendor does not already exist in FACSPro click [New] and complete the vendor information at the bottom of the screen.

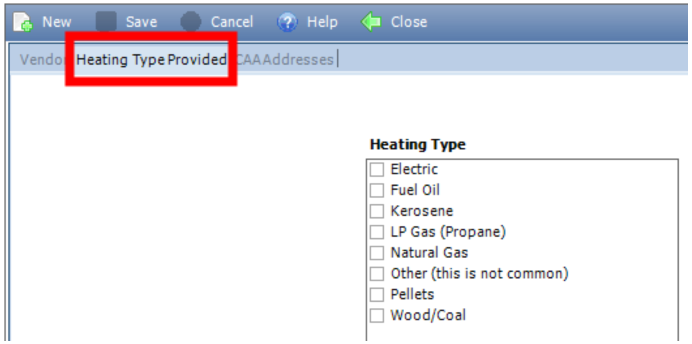



In order for the vendor to be used for MEAP programs they must be a DHS approved vendor and the DHS Vendor ID must be entered into the vendor setup in FACSPro by the help desk.

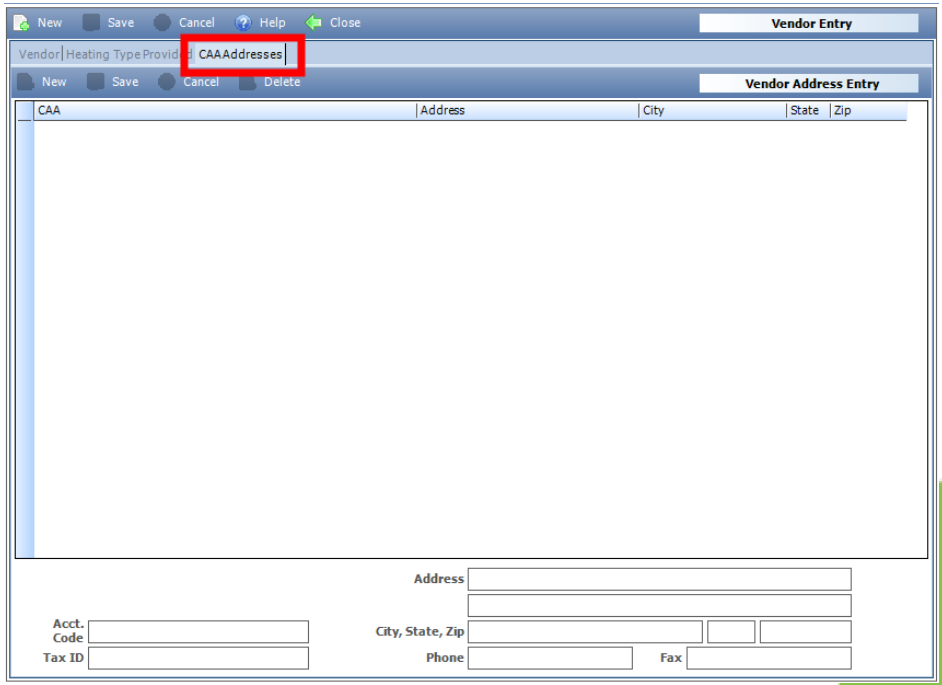


# Vendor Setup (cont.)

Click on the [Heating Type Provided] and select any of the heating types that are provided by the vendor (if any). This is used to populate the drop-down lists on the energy tab of customer intake.




If the vendor exists but the address is different than what your CAA needs to use there is a [CAA Addresses] tab that will allow you to assign a different address that will appear on your vouchers in AwardPro.

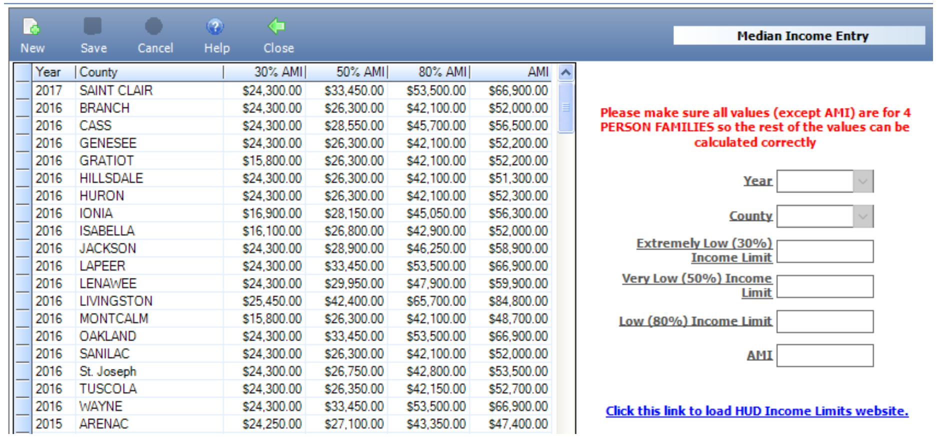


# Median Income Entry (HUD Income Limits)

Go to [System Admin] » [Median Income Entry]


To update the AMI setup for the new year click [New] and select the year and the county from the drop-down lists. Then enter the amounts of each level based on a family size of 4 and click [Save].

To correct a previous AMI then select it from the list, update the values, and click [Save].




| Year | County | 30% AMI | 50% AMI | 80% AMI | AMI |
|---|---|---|---|---|---|
| 2017 | SAINT CLAIR | $24,300.00 | $33,450.00 | $53,500.00 | $66,900.00 |
| 2016 | BRANCH | $24,300.00 | $26,300.00 | $42,100.00 | $52,000.00 |
| 2016 | CASS | $24,300.00 | $28,550.00 | $45,700.00 | $56,500.00 |
| 2016 | GENESEE | $24,300.00 | $26,300.00 | $42,100.00 | $52,200.00 |
| 2016 | GRATIOT | $15,800.00 | $26,300.00 | $42,100.00 | $52,200.00 |
| 2016 | HILLSDALE | $24,300.00 | $26,300.00 | $42,100.00 | $51,300.00 |
| 2016 | HURON | $24,300.00 | $26,300.00 | $42,100.00 | $52,300.00 |
| 2016 | IONIA | $16,900.00 | $28,150.00 | $45,050.00 | $56,300.00 |
| 2016 | ISABELLA | $16,100.00 | $26,800.00 | $42,900.00 | $52,000.00 |
| 2016 | JACKSON | $24,300.00 | $28,900.00 | $46,250.00 | $58,900.00 |
| 2016 | LAPEER | $24,300.00 | $33,450.00 | $53,500.00 | $66,900.00 |
| 2016 | LENAWEE | $24,300.00 | $29,950.00 | $47,900.00 | $59,900.00 |
| 2016 | LIVINGSTON | $25,450.00 | $42,400.00 | $65,700.00 | $84,800.00 |
| 2016 | MONTCALM | $15,800.00 | $26,300.00 | $42,100.00 | $48,700.00 |
| 2016 | OAKLAND | $24,300.00 | $33,450.00 | $53,500.00 | $66,900.00 |
| 2016 | SANILAC | $24,300.00 | $26,300.00 | $42,100.00 | $52,000.00 |
| 2016 | St. Joseph | $24,300.00 | $26,750.00 | $42,800.00 | $53,500.00 |
| 2016 | TUSCOLA | $24,300.00 | $26,350.00 | $42,150.00 | $52,700.00 |
| 2016 | WAYNE | $24,300.00 | $33,450.00 | $53,500.00 | $66,900.00 |
| 2015 | ARENAC | $24,250.00 | $27,100.00 | $43,350.00 | $47,400.00 |

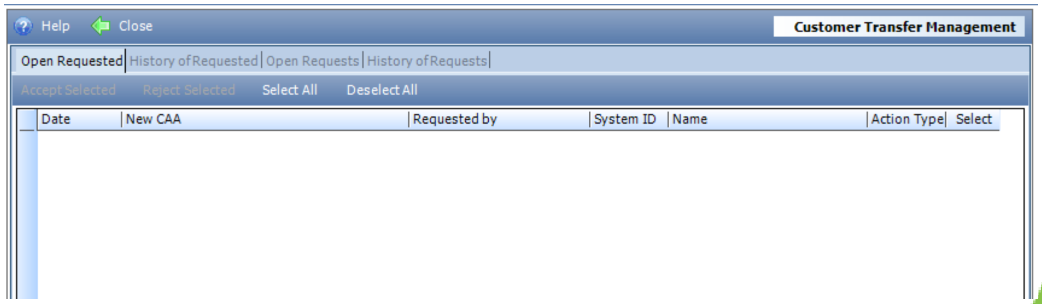
AMI values can be found on the HUD website and are updated annually.
In order to use AMI in any eligibility setup they must be updated in FACSPro.

# Customer Transfer Requests

Go to [System Admin] » [Customer Transfer Management]

The screen will open up to a list of an client that is waiting for your approval to transfer. Select the client(s) that you would like to approve/reject a transfer for by using the checkbox on the right and then click either [Accept Selected] or [Reject Selected].

The tabs along the top allow you to view transfer requests that your CAA has requested and are pending as well as the history of transfers both to and from your CAA.

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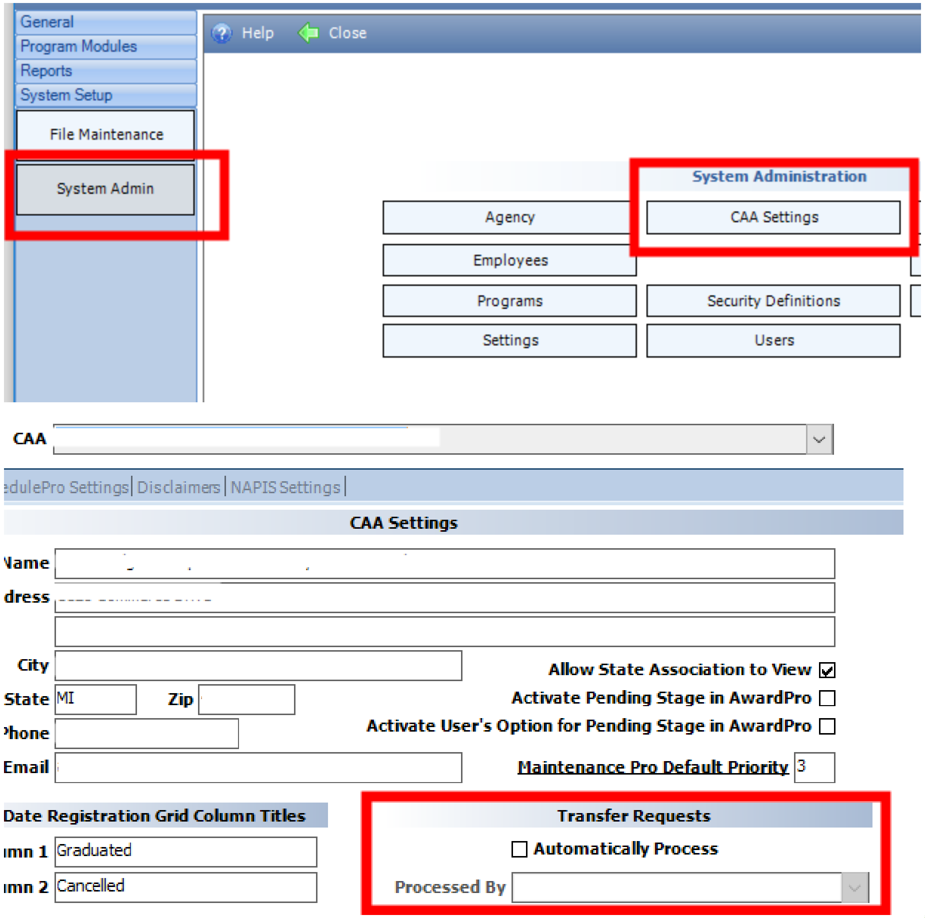
# Customer Transfer Requests (cont.)

To setup your agency to automatically approve transfer requests go to [System Admin] » [CAA Settings]

On the General Settings tab in the middle on the right hand side in the "Transfer Requests" section check the "Automatically Process" checkbox and select the user that will be listed as approving the transfers from the "Processed By" drop-down list.

By setting up the system to auto process transfer request it reduces the time a CAA has to wait for a transfer to go through when that customer comes into their office.



# Customer Transfer Requests (cont.)

What happens when a client is transferred within FACSPro?

The client information is transferred to the new CAA and they can update and enroll the client into their programs allowing them to be included in their IS Report.

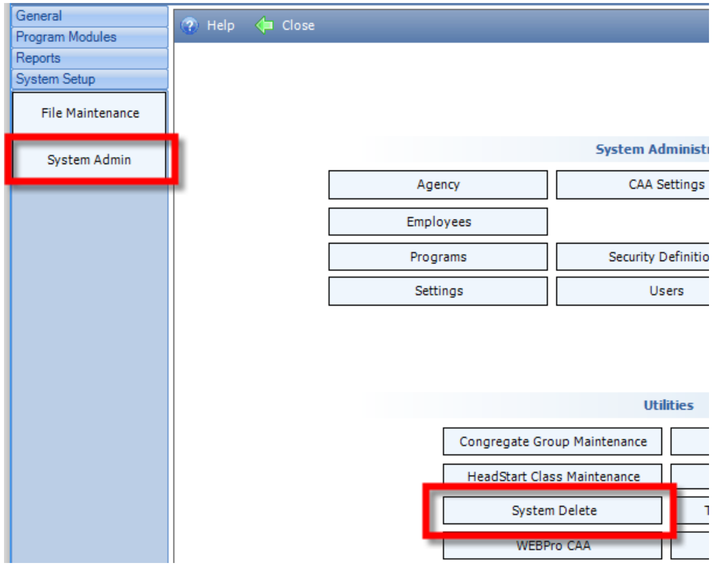
- The new CAA can see the list of programs that the client was enrolled in by the old CAA but can not view the details of the action plan nor make changes to it.
- The new CAA can access any documents that have been uploaded to FACSPro that have the access set to "All". If the document was uploaded with Access set to "Agency Only" then the new CAA can not view them.

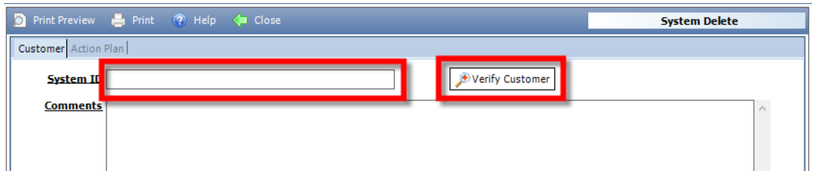
The action plans that were created by the old agency still get included in the IS Report.

- If the agency needs to make any changes to the action plans that had created they will need to request a transfer back and then changes can be made.

# Duplicate Client Deletion

Go to: [System Admin] » [System Delete]




Enter the System Id of the client that you need to remove from FACSPro, and click [Verify Customer]

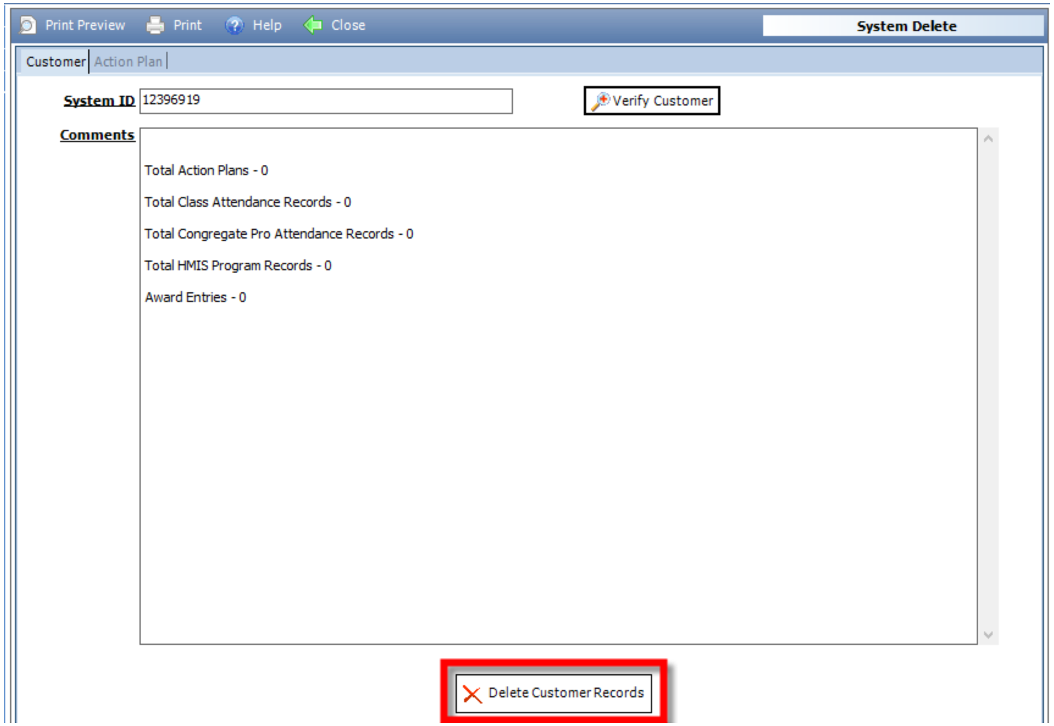
**CAUTION: REMOVING A CLIENT FROM THE SYSTEM IS NOT REVERSABLE!!! MAKE SURE THAT YOU ARE 100% POSITIVE THAT THE CLIENT IS A DUPLICATE.**

# Duplicate Client Deletion (cont.)

If the client has no action plans created or has not had any interactions within FACSPro then the [Delete Customer Records] button will appear at the bottom.

If the client has had records created then the button will not appear and they will need to be removed first. Before removing the action plan or other information make sure that the information has been created under the correct client.

Click the [Delete Customer Records] to remove the client forever.



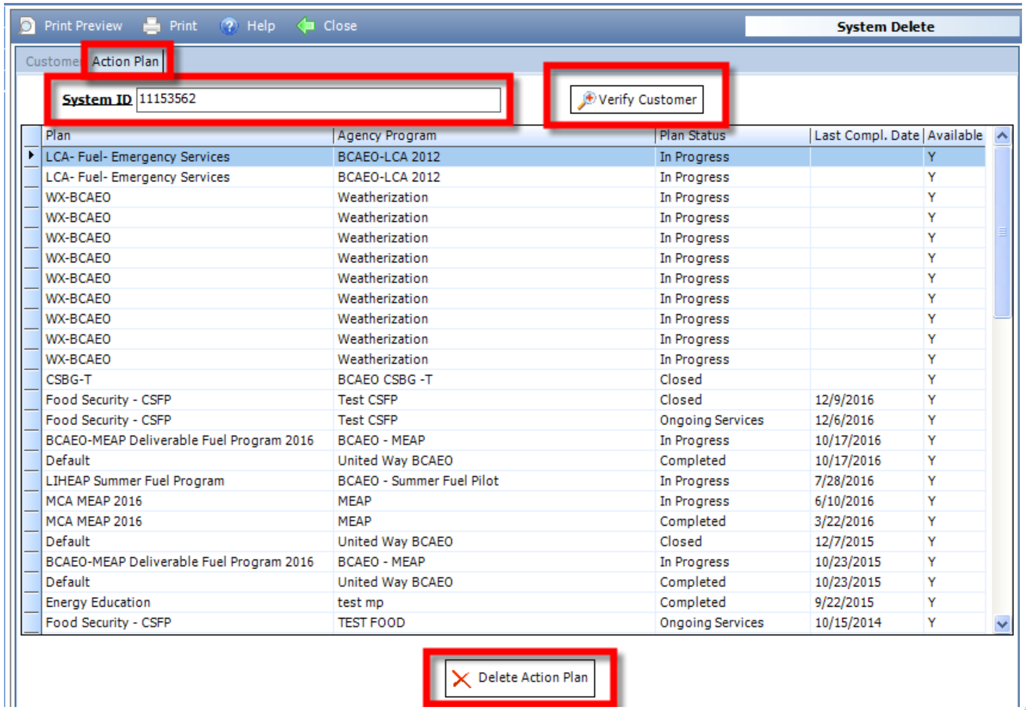

**CAUTION: REMOVING A CLIENT FROM THE SYSTEM IS NOT REVERSABLE!!!**
**MAKE SURE THAT YOU ARE 100% POSITIVE THAT THE CLIENT IS A DUPLICATE.**

# Duplicate Client Deletion (cont.)

To view a list of all of the action plans that have been created for the client you can click on the [Action Plan] tab at the top and reenter the System ID, then click [Verify Customer].

From here the action plans can be deleted by clicking [Delete Action Plan].

Don't delete action plans until they have been recreated for the "correct" client.




| Plan | Agency Program | Plan Status | Last Compl. Date | Available |
|---|---|---|---|---|
| LCA- Fuel- Emergency Services | BCAEO-LCA 2012 | In Progress | | Y |
| LCA- Fuel- Emergency Services | BCAEO-LCA 2012 | In Progress | | Y |
| WX-BCAEO | Weatherization | In Progress | | Y |
| WX-BCAEO | Weatherization | In Progress | | Y |
| WX-BCAEO | Weatherization | In Progress | | Y |
| WX-BCAEO | Weatherization | In Progress | | Y |
| WX-BCAEO | Weatherization | In Progress | | Y |
| WX-BCAEO | Weatherization | In Progress | | Y |
| WX-BCAEO | Weatherization | In Progress | | Y |
| WX-BCAEO | Weatherization | In Progress | | Y |
| WX-BCAEO | Weatherization | In Progress | | Y |
| CSBG-T | BCAEO CSBG -T | Closed | | Y |
| Food Security - CSFP | Test CSFP | Closed | 12/9/2016 | Y |
| Food Security - CSFP | Test CSFP | Ongoing Services | 12/6/2016 | Y |
| BCAEO-MEAP Deliverable Fuel Program 2016 | BCAEO - MEAP | In Progress | 10/17/2016 | Y |
| Default | United Way BCAEO | Completed | 10/17/2016 | Y |
| LIHEAP Summer Fuel Program | BCAEO - Summer Fuel Pilot | In Progress | 7/28/2016 | Y |
| MCA MEAP 2016 | MEAP | In Progress | 6/10/2016 | Y |
| MCA MEAP 2016 | MEAP | Completed | 3/22/2016 | Y |
| Default | United Way BCAEO | Closed | 12/7/2015 | Y |
| BCAEO-MEAP Deliverable Fuel Program 2016 | BCAEO - MEAP | In Progress | 10/23/2015 | Y |
| Default | United Way BCAEO | Completed | 10/23/2015 | Y |
| Energy Education | test mp | Completed | 9/22/2015 | Y |
| Food Security - CSFP | TEST FOOD | Ongoing Services | 10/15/2014 | Y |

CAUTION: REMOVING A CLIENT FROM THE SYSTEM IS NOT REVERSABLE!!!
MAKE SURE THAT YOU ARE 100% POSITIVE THAT THE CLIENT IS A DUPLICATE.

# What to contact the Help Desk for?

- An issue that you are unable to resolve on your own
- Error message(s) received
- Setup/Adjustment of:
  - Action Plans
  - Program Eligibility
  - AwardPro limits
  - Drop-down list options
- General questions regarding FACSPro
  - *Program policy questions should go to your funder/grant manager*
- Vendor DHS numbers
- Suggested changes to the system (some will require a change order at a cost)

# FACSPro Contact Information

- If CAA FACSPro System admins need assistance please contact the FACSPro Helpdesk.

- FACSPro Helpdesk for Michigan is operated by Keith Schafer (MCA), Maddy Kamalay (MCA), Benjamin Gulker (DHHS-BCAEO), and is monitored by DBA Technologies (FACSPro Vendor)

- Please make sure to contact mihelp@dbafacspro.com so that it is distributed to everyone on the helpdesk.

# Questions?

# Thank you