Kansas Substance Use Reporting Solution (KSURS)

Application User Guide

The purpose of this document is to help guide users through the main functions of the KSURS application for manual entry of client data.

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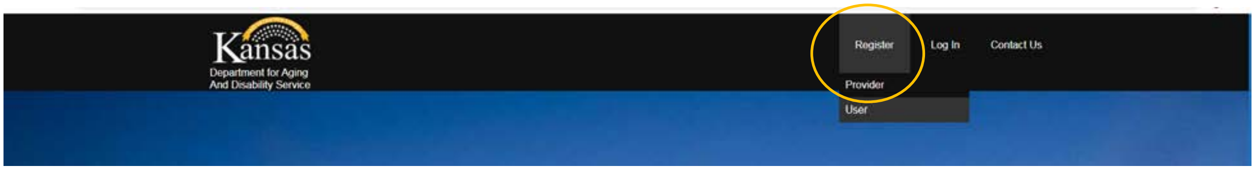
System Requirements

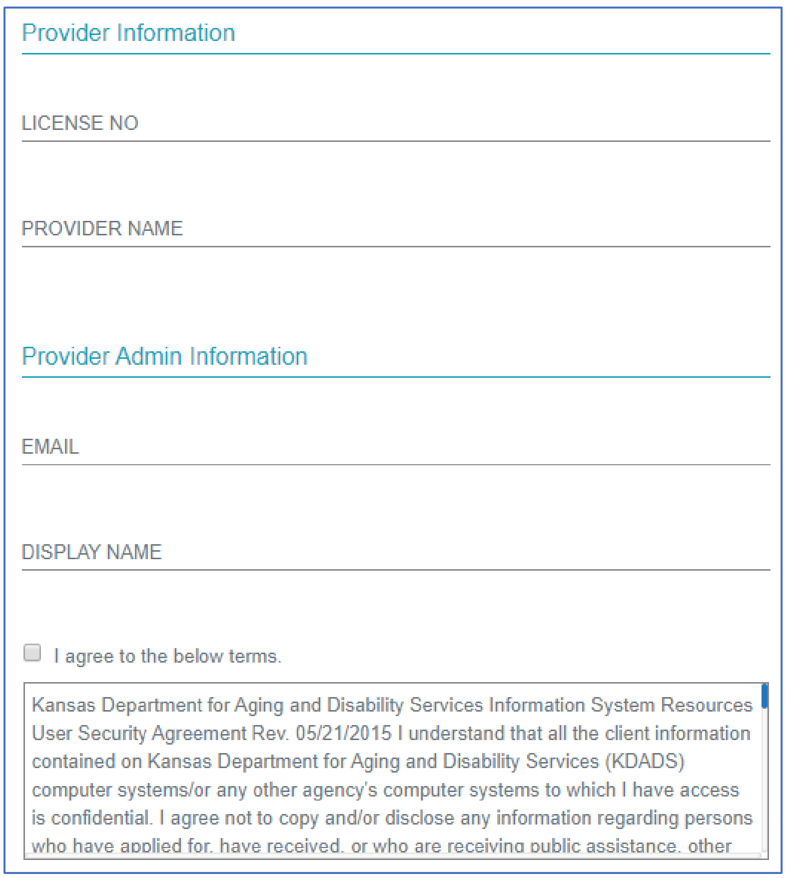
- An Internet connection is required to access the KSURS website.
- Internet Browser:
  - This application works with modern browsers such as Chrome, Edge, and Firefox.
  - While KDADS supports existing applications using Internet Explorer v11, KSURS is the first application that is not compatible with this legacy browser.

Register a Provider/Provider Admin

1. Go to the application website at ksurs.kdads.ks.gov.
2. Click on the “Register” link at the top of the KSURS Sign In page.



3. Choose “Provider.”
4. The Provider Registration page displays. All fields are required.


Provider Information

LICENSE NO

PROVIDER NAME

Provider Admin Information

EMAIL

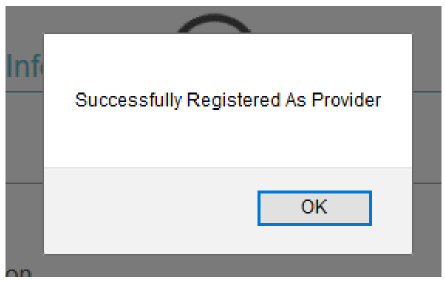
DISPLAY NAME

I agree to the below terms.

Kansas Department for Aging and Disability Services Information System Resources User Security Agreement Rev. 05/21/2015 I understand that all the client information contained on Kansas Department for Aging and Disability Services (KDADS) computer systems/or any other agency's computer systems to which I have access is confidential. I agree not to copy and/or disclose any information regarding persons who have applied for, have received, or who are receiving public assistance, other

5. Tab to or click in the LICENSE NO field and enter the license number for the license holder.
6. Tab to or click in the PROVIDER NAME field and from the drop-down list select the provider name associated with the license number entered. If the provider has multiple licensed locations (i.e. different license numbers), each location must register.
   NOTE: If a provider name does not appear in a drop-down list, this indicates the license number is not recognized by KSURS. Manually enter the Provider Name/Location the organization was licensed under and continue with the next step. KDADS licensing will review the new provider information.

7. Tab to or click in the EMAIL field and enter the business email address of the Provider employee that will serve as the KSURS Provider Admin. This person is the only KSURS user for this Provider that will have the authority and security access to approve new KSURS users that register under this Provider.
8. Tab to or click in the DISPLAY NAME field and enter the Provider Admin's first and last name.
9. Read the terms and then click on the checkbox to indicate you have read and agree to the stated terms.
10. A "Register" button will appear – click on it to submit the Provider Registration.
11. A message will display to indicate the registration has been submitted. Click OK and the KSURS Sign in.

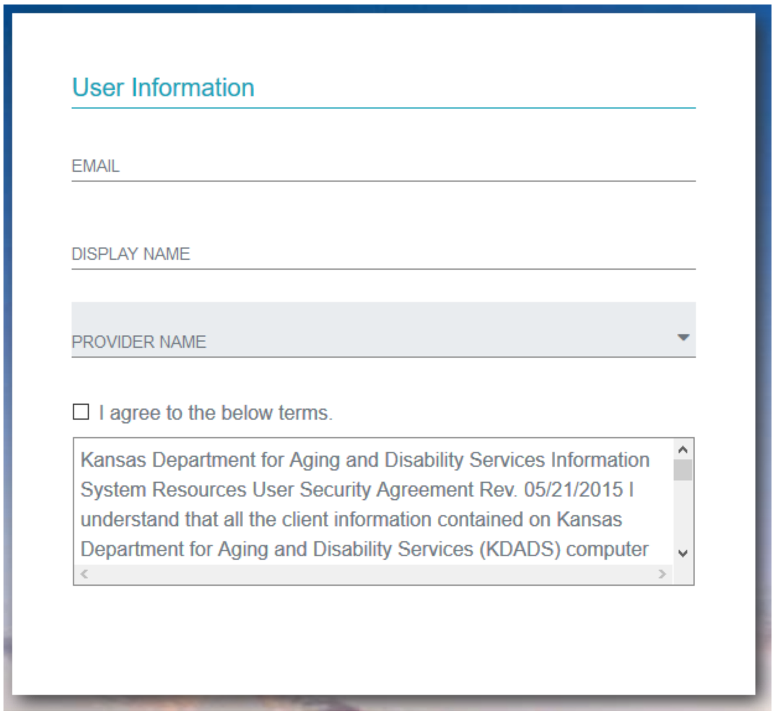


12. Once Provider Registration has been successfully submitted, KDADS licensing staff will verify the information entered in the registration and will approve the Provider registration. Once KDADS has approved the registration, the Provider Admin user account will be created, and an email will be sent to the Provider Admin email address with a temporary password. When the Provider Admin logs in for the first time, the user will be prompted to change the temporary password. The new password will be good for 90 days, at which time the Provider Admin will be prompted to change it again.

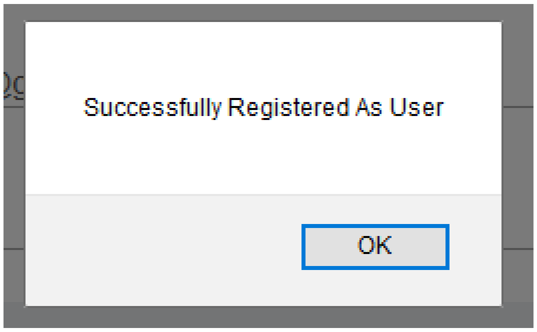
Register a User

IMPORTANT: Users cannot register until the provider they are associated with has been registered and approved in KSURS. If the user's provider does not appear in the Provider Name drop-down list, the provider's registration has not been submitted or if submitted, has not yet been approved.

1. Go to the application website at ksurs.kdads.ks.gov.
2. Click on the "Register" link at the top of the KSURS Sign In page.
3. Choose "User."
4. The User Registration page displays. All fields required.



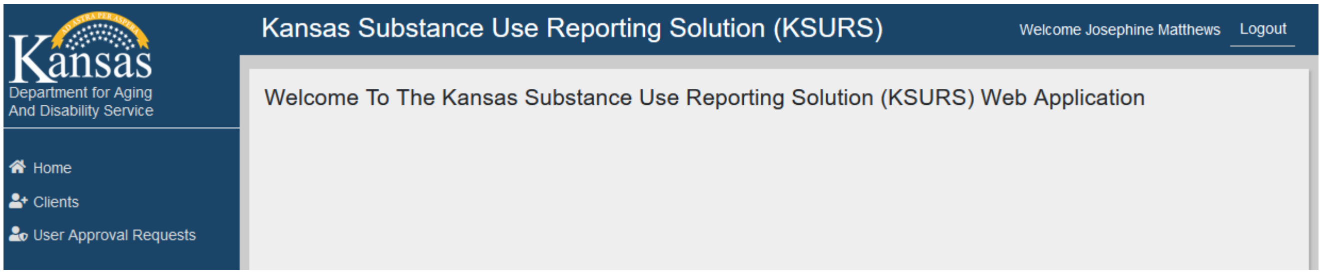
5. Click in the EMAIL field and enter your business email address that will be used for any KSURS-related communications/notifications.
6. Tab to or click in the DISPLAY NAME field and enter your first and last name.
7. In the PROVIDER NAME field select the Provider license that you are associated with.
8. Read the terms and click on the checkbox to indicate you have read and agree to the stated terms.
9. A "Register" button will appear – click on it to submit the User Registration.
10. A message will display to indicate the registration has been submitted. Click OK and the KSURS Sign In page displays.



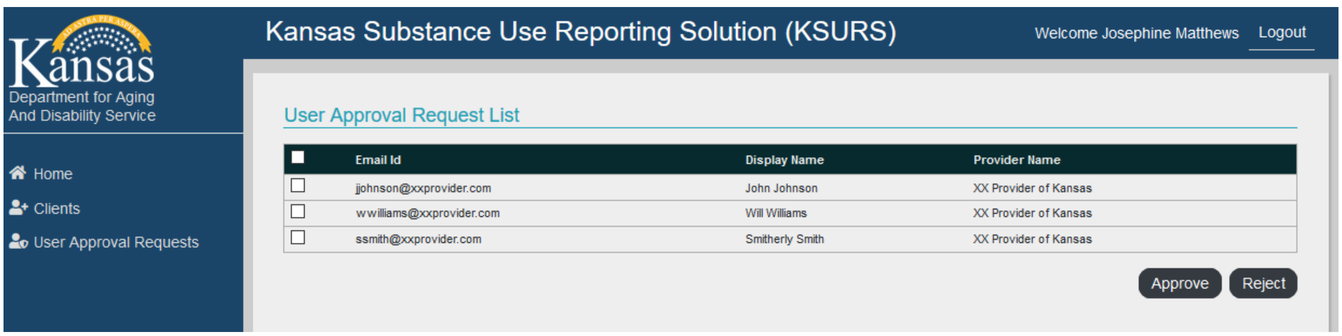
11. The Provider Admin will verify the information entered in the registration and will approve the User registration. The User account will be created, and an email will be sent to the User's email address with a temporary password. When the User logs in for the first time, the user will be prompted to change the temporary password. The new password will be good for 90 days at which time the user will be prompted to change it again.

Approve a User

1. Provider Admin logs in.
2. Click on "User Approval Requests" in the menu bar.



3. User Approval Request List displays.



4. Provider Admin verifies the email address, display name, and provider of the user are correct.
5. To Approve:
   a. Click the checkbox next to the user(s) to be approved.
   b. Click on the Approve button.
   c. The approved user entries are removed from the list, their user account is activated, and an email is sent to the email address they registered with. It contains a temporary password they will login with, which will have to be changed the first time they login.
6. To Deny/Reject:
   a. If a user's email address or display name is incorrect, the request should be denied.
   b. Click the checkbox next to the user(s) to be denied
   c. Click on the Reject button
   d. The rejected user entries are removed from the list, their user account is NOT activated, and they will not receive an email. The Provider Admin should contact the employee to let them know why their registration was rejected, and they can then re-register with the correct information.

Logging in to KSURS for the First-Time

1. Launch the KSURS web application.
2. Click on Log In to launch the login page.
3. Enter your email address that you registered with.
4. Enter the temporary password sent to you in your email notification.
5. If your email address is registered with more than one provider location, select the Provider Name you want to login under.
6. Click on the Sign In button.
7. When prompted to change your password, enter the temporary password that was emailed to you in the "Old Password" field, and then enter a new password that meets the following complexity requirements:
   - Cannot reuse the last 24 passwords
   - at least 12 characters in length
   - contain characters from at least three of the following four categories:
     Uppercase letters (A through Z)
     Lowercase letters (a through z)
     Numbers (0 through 9)
     Special characters (e.g. ! @ # $ % & * etc.)
8. Click on the Sign In button to change the password and complete the password change and login process.
9. The KSURS Home Page displays.

Logging in to KSURS

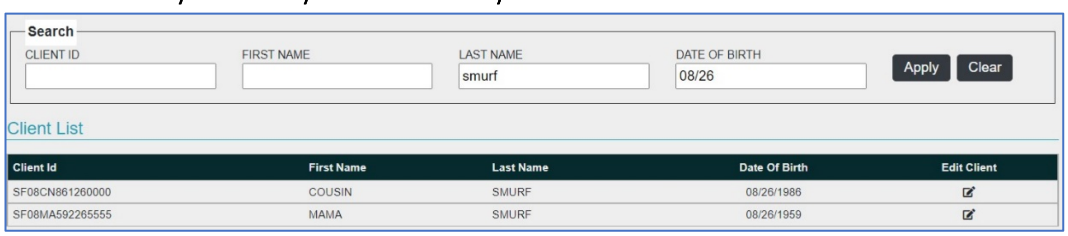
1. Launch the KSURS web application.
2. Click on Log In to launch the login page.
3. Enter your email address that you registered with.
4. Enter your password.
5. If your email address is registered with more than one provider location, select the Provider Name you want to login under.
6. Click on the Sign In button.

Note: Whenever you login to KSURS, always take a moment to check the KSURS Home Page for any new announcements.

Search for a Client

1. Users should search for a client in the KSURS Client Record List before adding the client as new.
2. Locate “Clients” on the left menu bar and click on “Client Record List.”

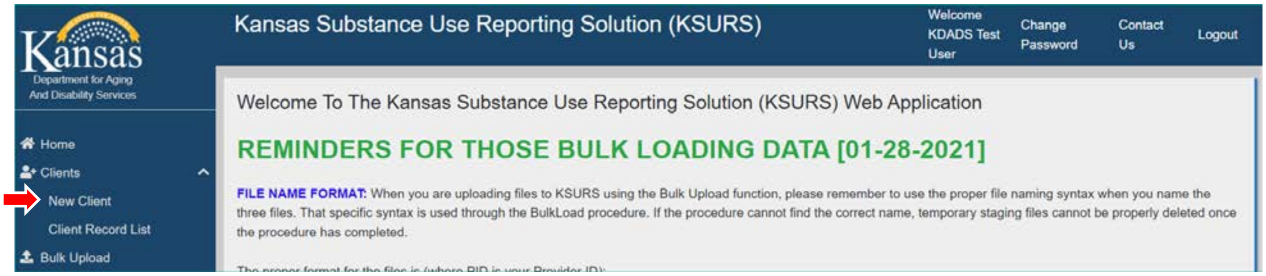
3. Type the text you want to search for in the desired search field(s) and click “Apply.”
    a. Users can use multiple filters in a search (First and Last Name, Last Name and Date of Birth, etc.).
    b. Using multiple filters does a Boolean “and” search – data must match all search criteria.
    c. User can use partial filters to search – for example search by last name and first initial or enter month and day but not year of birthday.



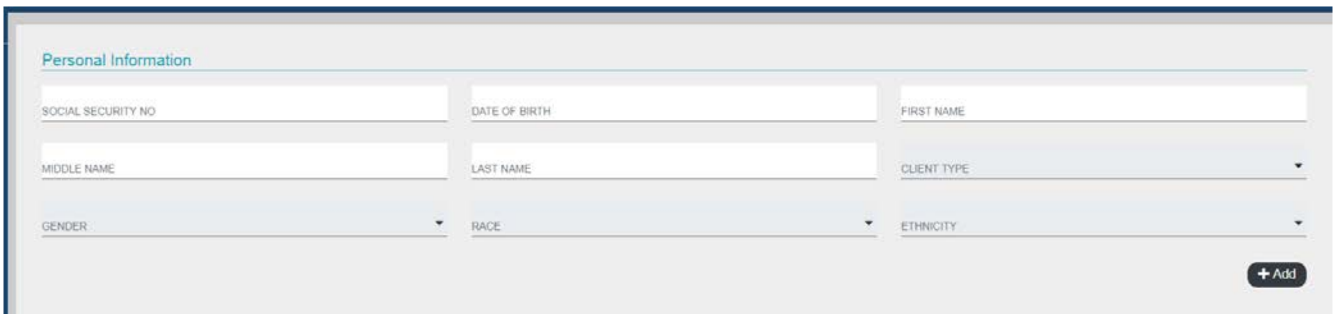
4. Records matching the search criteria will display in the Client List.
5. To return to the unfiltered Client List, click “Clear” and all records will show.

Create a Client

1. Locate and click on “Clients” on the left menu bar and click on “New Client”.



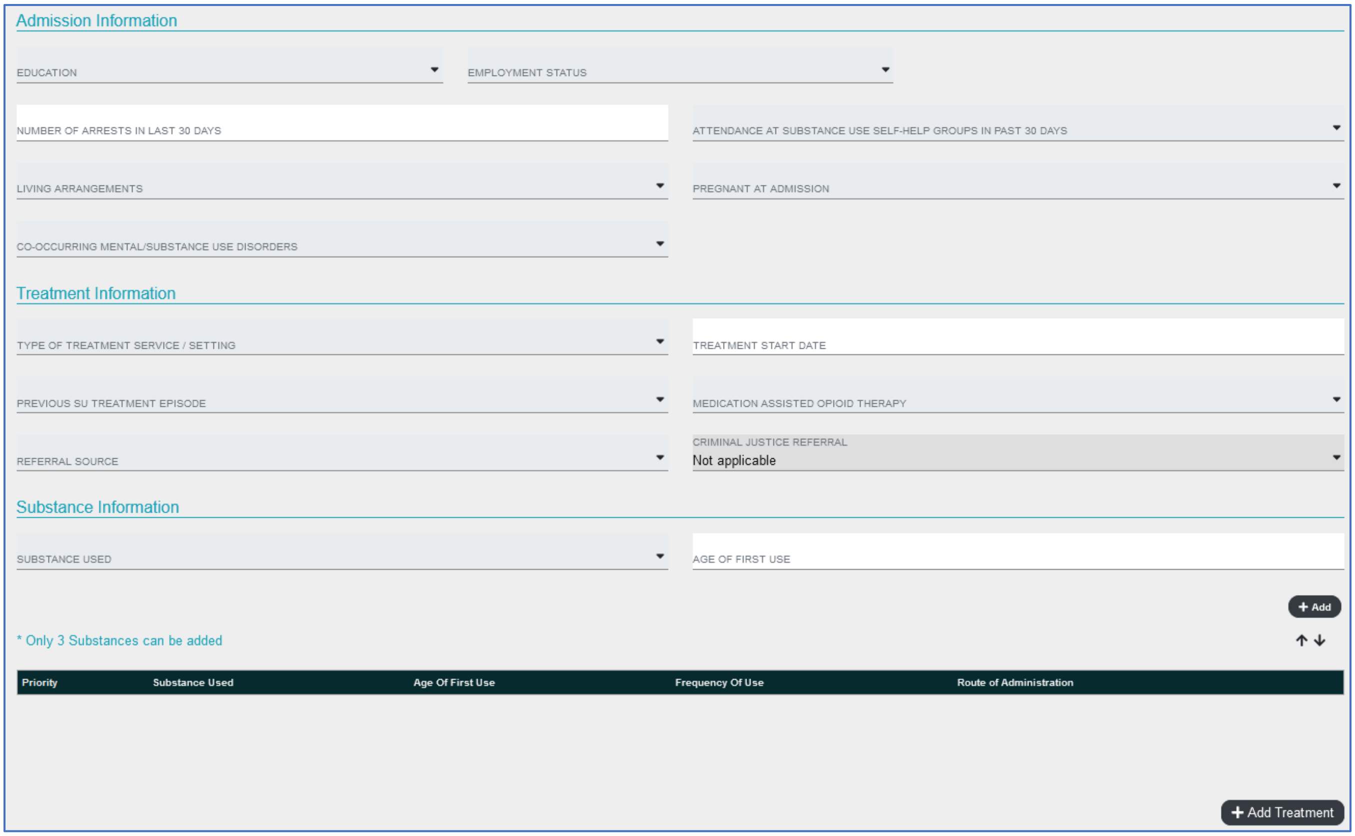
2. Personal Information Page displays.



3. Complete fields displayed. First Name, Last Name, and Date of Birth are required fields. Users will not be able to create a new client without completing those fields. If unable to obtain a valid Date of Birth (because the client refuses or is unable to provide), either enter 01/01/0007 to indicate the Date of Birth is unknown or leave the field blank and the unknown code will be entered in the database when the record is saved.
4. Click on the “+Add” button below the fields.
5. The Treatment Information region will display. Users can click on the +Add New Treatment link to enter treatment information or click on the desired menu bar link to navigate to another page.

Create a Treatment Record

1. Users can enter treatment information following the creation of a New Client record or after searching for an existing client in the application.
2. Enter information or select a field value from the drop-down box.



3. The following fields are required to save a treatment record:
    a. Type of Treatment Service/Setting
    b. Treatment Start Date
    c. Substance Used
    d. Age of First Use
    e. Frequency of Use
    f. Route of Administration
4. Collect as much information as possible. If too many "Unknown" values are entered and submitted to the TEDS federal database that KSURS data goes to, it may raise a red flag.
5. After completing the Substance Information fields, click the "+Add" button to add the data to the treatment.
    a. If User needs to report information on more than one substance, enter the second set of Substance Information and click the "Add" button again to save it. Additional substance information will display in the table below the entry fields.
    b. Users can change the order of primary, secondary, and tertiary substances used by clicking on the up or down arrows below the "Add" button.

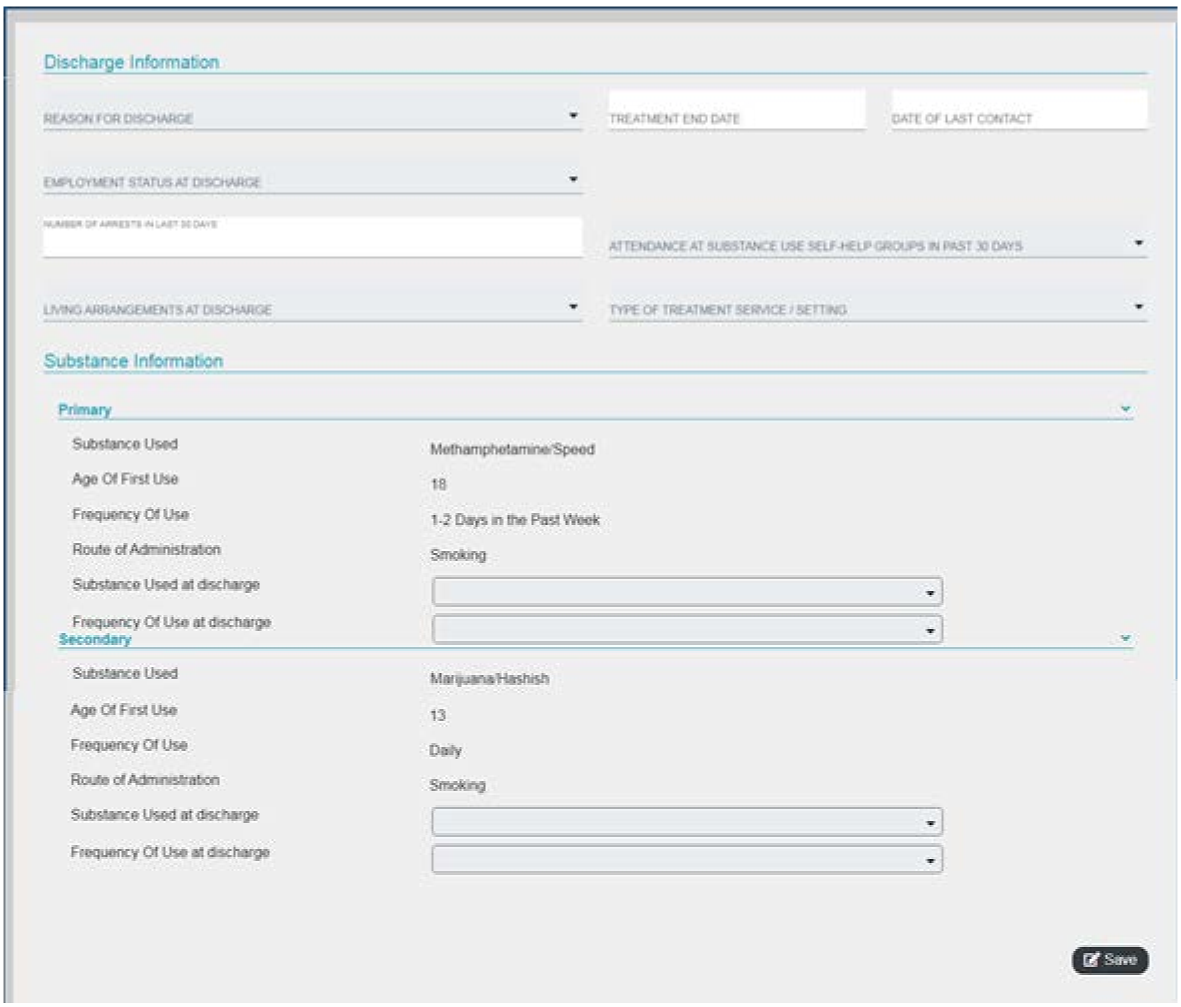
6. Click or tab to the “+Add Treatment” button in the lower right corner of the page to save the whole Treatment Admission record.

Discharge Treatment Record

1. From the Client Record List select the client and treatment record to discharge. All treatment records entered for that client will display.
2. Click the arrow in the Discharge column for the treatment record to be discharged.

3. Enter the information or select a field value from the drop-down box.

   Note: Depending on the selections made in Substance Information, some fields may auto-fill and cannot be changed.



4. Click on the “Save” button in the lower right corner of the page to save the Treatment Discharge record.

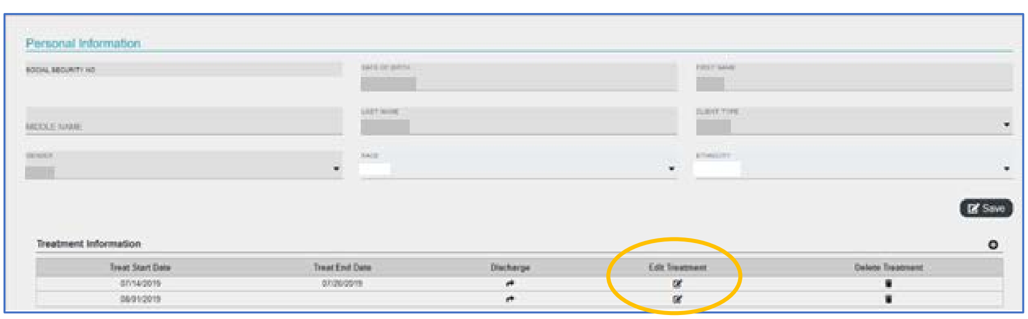
Edit a Client or Treatment Record

1. To edit a client's personal information:
    a. From the Client Record List click the "Edit Client" button by the client to be edited.

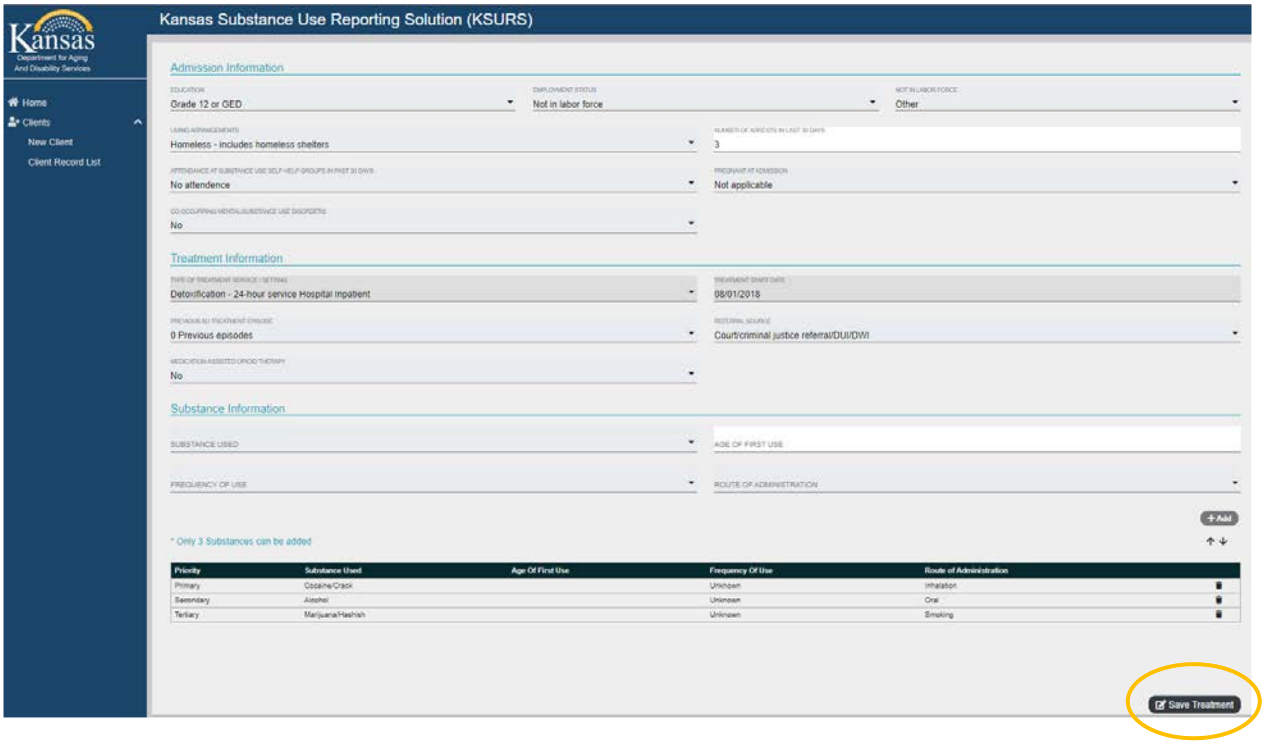
    b. Fields that are greyed out cannot be edited.

    c. If a User must edit a field other than Race or Ethnicity, refer to the chapter to "Delete" a Client at the end of this manual.

2. To edit a client's treatment record:
    a. From the Treatment Information List click the "Edit Treatment" button for the treatment record to be edited. Users can edit all fields except "Type of Treatment Service/Setting" and "Treatment Start Date." If "Type of Treatment Service/Setting" or "Treatment Start Date" must be changed, User must delete the Treatment record and reenter.

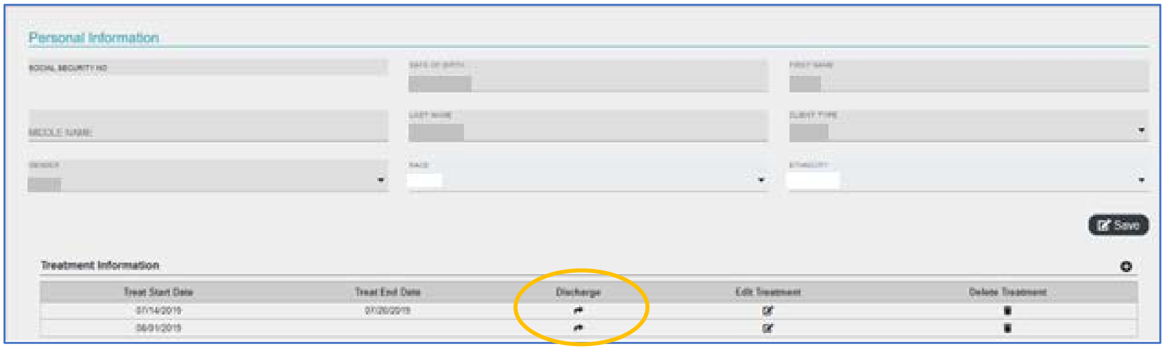


b. Click “Save Treatment” at the bottom of the page to save the edited record.

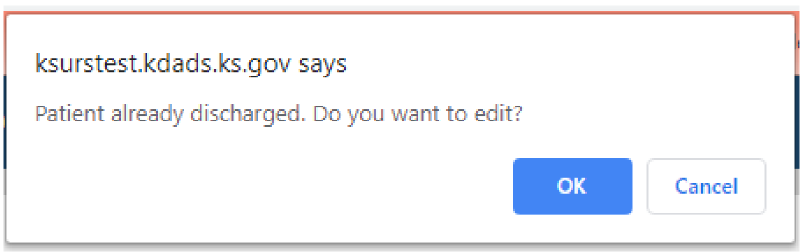


Edit a Treatment Discharge Record

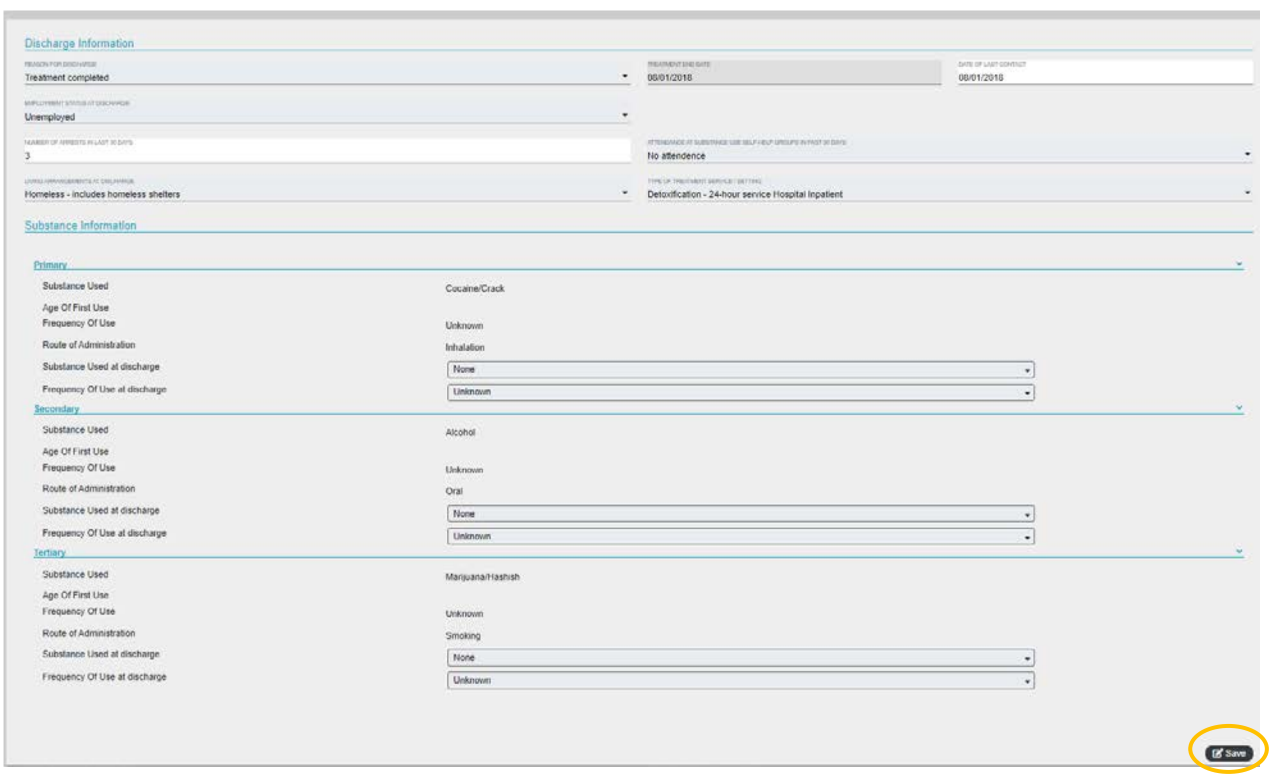
1. From the Treatment Information list, click the Discharge arrow for the Discharge record to be edited.



2. A dialog box will display confirming User wants to edit a discharge record that has already been entered. Click OK to proceed.



3. Enter the information to be edited. Click Save.



“Delete” a Client

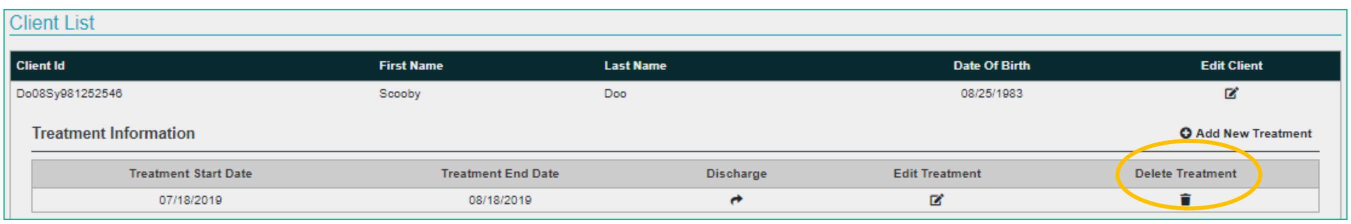
There is no “Delete Client” button in KSURS. Because of the processes that extract data from KSURS and submit it to the federal TEDS database, client records cannot be deleted from KSURS in real time. This page explains the steps required to “delete” a client, or to replace an incorrect client record with a corrected one.

The only client demographic data that can be edited on the Personal Information page (using the Edit Client icon) are Race and Ethnicity. The only way to change the other fields on this page is to recreate the client.

This can only be done if the data entered will create a different client ID than the original one.

- If the following values do *not* change with the corrected record, the new ClientID will duplicate the existing client’s ID and you will not be able to recreate the client immediately:
  - SSN last 4 digits
  - Date of Birth (any part of it)
  - Gender
  - client’s first and last letters of their first and/or last name
- If one or more of the above values *does* change, you can recreate the client immediately because the client ID will be different.

If the original client record already has treatment episode(s) saved to it, they must be deleted using the Delete Treatment function.



Then, as long as the new client ID will be different, the new client can be created, and the treatment episode(s) re-entered. Any client record that has had no treatment episodes associated with it for approximately 60 days will automatically be removed from the KSURS database and disappear from your client list*.

If you are unable to recreate a client record to correct demographic data because the client ID will not change with the new client record, contact the KDADS Web Applications Help Desk (KDADS.Helpdesk@ks.gov or 785.296.4987 option 1) for further assistance.

*Due to the complexity of the timing of updating a KSURS client and/or treatment episode in the KSURS database and the federal TEDS database, a delete client option in KSURS is not available. A scheduled maintenance function runs instead, and looks for any clients that have had no treatment episodes associated with it for 60 days. Then the client record is automatically deleted from KSURS, and then eventually from TEDS. The delay in deleting the client record ensures that any treatment episode deletions that need to be submitted to TEDS will be complete before the client associated with the deleted treatment episodes is also deleted. This can take up to 60 days, depending on when the changes were made in the KSURS database and when the changes were submitted to TEDS.