# KY CCBHC SHAREPOINT USER GUIDE

Hefling, Carol (CHFS OATS DMS)

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# Getting Access

External access to the site will be given once a KOG Business account is obtained.

To create a business KOG account, visit http://kog.chfs.ky.gov.

- When creating an account, the user **must use their name or some recognizable form of their name** as their user name and **must provide a valid business email address**.
- The user must request access to the app CHFS SharePoint External/Public during their account creation.

- Once the user receives confirmation that their account has been created, send an email to samantha.craft@ky.gov, carol.hefling@ky.gov and cc: dana.mckenna@ky.gov letting us know you have completed set up.
- When we receive the email, we will add the user to the site and send the User ID and the URL.

- **PLEASE NOTE:** When logging into SharePoint, the users email **IS NOT** the user name. The user name is **CIT\USERNAME**.
- The password is the password set up during the set-up process.
- **ADDITIONALLY**, please be sure to let us know when an account should be closed. Send an email to dana.mckenna@ky.gov, carol.hefling@ky.gov and samantha.craft@ky.gov.

# CCBHC Roles

The views the user sees will depend on their function assigned to their role on the site. CCBHCs will ONLY be able to see information pertaining to their own organization.

- **CCBHC Basic Role:** CCBHCs Basic Users can submit documents to the Document Review Approval Workflow, View Announcements and receive Announcement Alerts, View Contact Directory, View and click on Links, Upload and View documents in Documents Library, Upload, download and View documents in Agency Submissions. Users will also be able to create, comment on CCBHC Information Request.

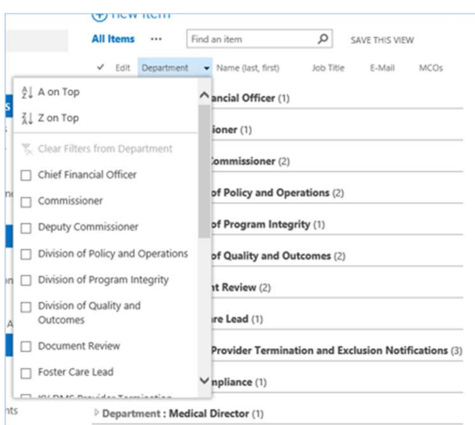
# Sort and Filter Tips

SharePoint offers the option to sort and filter results based on columns you see. As every subsection is different, you are able to make a temporary view by what you want to see. Below are some tips on filtering.

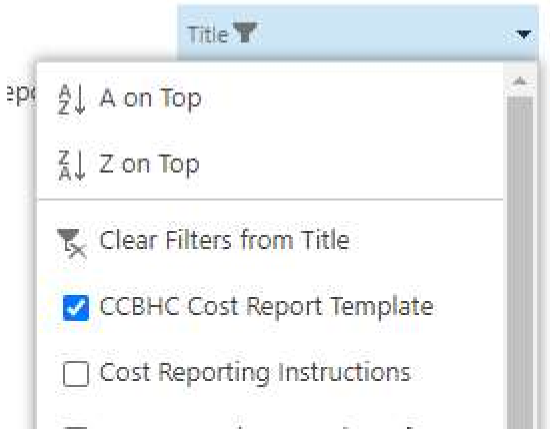
- Filtering reduces the number of items displayed in a view to only the data that you want to see. You can select items such as location, type of item or date range.
- Sorting indicates the order in which the data will appear. You can arrange by ascending or descending.
- Typical filtered views include:

| To filter by: | Index the: | For example: |
|---|---|---|
| Recently changed items | **Modified** column | To view only items that have changed in the past week, apply the filter **Modified is greater than**[Today]-7. |
| New items | **Created** column | To create a view of only those items that were added in the past week, apply the filter **Created is greater than** [Today]-7. |
| My items | **Created By** column | To create a view of only those items that you added, apply the filter **Created By is equal to** [Me]. |
| Items due today | **Due Date** column (created by you in a list or library) | To create a view of only those items with a due date of today, apply the filter **Due Date is equal to** [Today]. |
| Discussion board updates | **Last Updated** column | To create a view of only the discussions that were updated in the past month, apply the filter **Last Updated is greater than** [Today]-30. |
| Archive files in a document library | **Date Modified** | To create a view of documents not changed since the year 2016 (that you then want to archive), apply the filter **Date Modified is less than December 31st, 2016.** |
| Find a subset of financial | **Region**, **Year** (as two simple indexes) | To create a view of financial data for the Northeast region in 2015, apply the filter **Region equals "NE" AND Year equals 2015** because the **Region** column is likely to have less values than the **Year** column. |

- To set up a sort, you can hover your mouse over a column on the page. Once you do, you will see an arrow and a dropdown. Each dropdown will offer different sort filters based on data. If it is a date, for instance, it will allow for the option of ascending or descending. If it is not a date, the following view will appear.



- If you know the exact information you are looking for, you can choose from the dropdown by following the steps above.  Once you click on the information you want, it will appear on the SharePoint page.




# CCBHC Official Communications

The CCBHC Official Communications section contains information for all CCBHCs. This will include updates from DMS or CMS policy updates or changes. CCBHCs will not be able to add announcements.  The view on the SharePoint site will allow users to click on the link

## Announcements

Announcements will include any technology updates from OATS as well as DMS policy updates or changes. Additional Announcement Types may be added at a future date. CCBHC's will not be able to add announcements.  The view on the SharePoint site will allow users to click on the link for Announcement Type to expand, see highlighted area below.


Announcements will be in chronological order based on the most recent announcement. Announcements has two views, **Current Year** and **All Items**. **Current Year** displays the current year announcements. **All items** displays all previous year announcements. Switch views by clicking the link at the top of the Announcements library view.

## Contact Directory

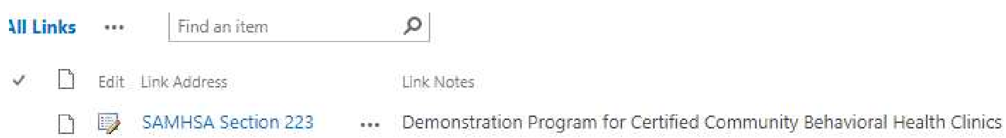
The Contact Directory will include Department, name and email address of DMS employees. Users will be able to filter contacts by department, Name (last, first), Job Title, and E-Mail.

CCBHC Agency listings are included, however, the contacts are only viewable by their own CCBHC Agency users and DMS. CCBHCs are expected to update their Contact Directory information (i.e. adding or deleting contact names).


To send an E-Mail from the SharePoint site, click on the address.

## CCBHC Helpful Links

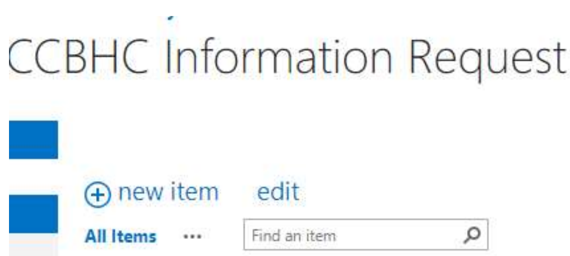
DMS will add links to the SharePoint site that are important. Links will be added as needed. Click on hyperlink to open the url in separate tab.



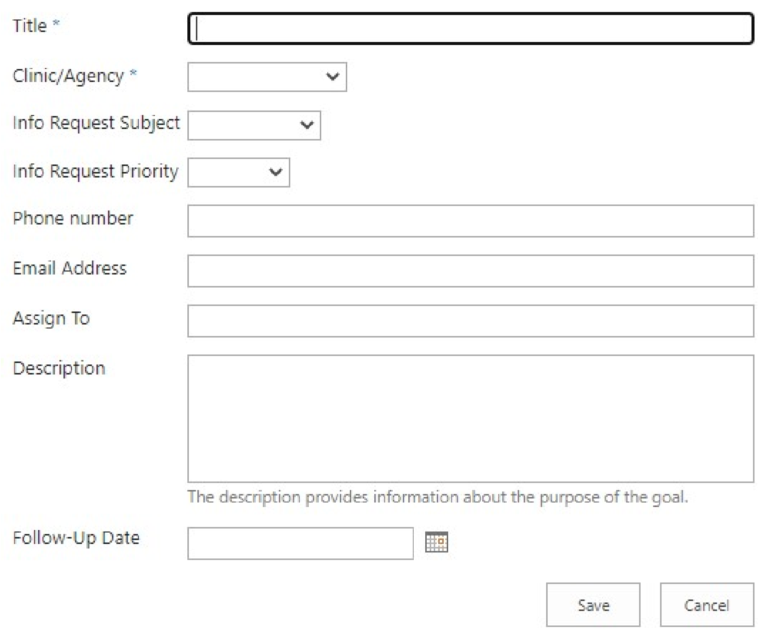

## CCBHC Information Request

The CCBHC Information Request section will be a centralized space for CCBHCs to request information or clarify information previously discussed with DMS personnel. This section is used to communicate and track any issues that need attention. CCBHC Agencies will be able to add, edit and close any issues. DMS can provide responses or initiate discussions or request for additional information from Agencies. Each Agency view is individualized and secure. Each Agency can view only their own information, namely Information Requests, DMS Requests and any related responses.

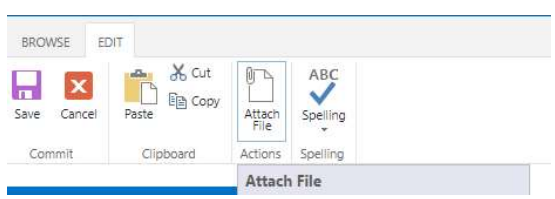
**To add an information request**, click on the new item link, you will be directed to a screen that will allow you to enter in the pertinent information for that item.



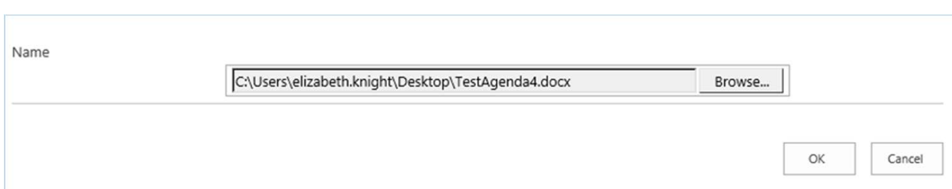

Items denoted with an asterisk are required fields.




- Item Title*– this is a short summary to describe the topic of the request.
- Clinic/Agency* – from the dropdown, select the agency you are associated with.
- Info Request Subject – from the dropdown, select the topic that closely matches the request.
- Info Request Priority – from the dropdown, select the level of priority.
- Phone number – provide a phone number for a return call back.
- Email Address – provide an email address for a return email response.
- Assign To – assign the person within your agency responsible for this topic by entering their name.
- Description – provide a detailed description of the request.
- Follow-Up Date – enter a future date when the agency follow-up needs to be completed by agency personnel.
- To add an attachment, click on the Attach File icon from the top menu.




An upload box will appear, click Browse button and search for document. It is helpful to add the date and initials to attachments as part of the name.



Click OK button.
Attachment will show under date text box in the item description area.
There is option to delete file. 


Before clicking Save, verify the information submitted is correct and your agency was selected. Once the item is **Saved**, you will be directed back to the dashboard. The new item will be shown with a green indicator at the end of the title to indicate that it is a New item. If an attachment was uploaded, the attachment icon will show on the dashboard next to the Request item.

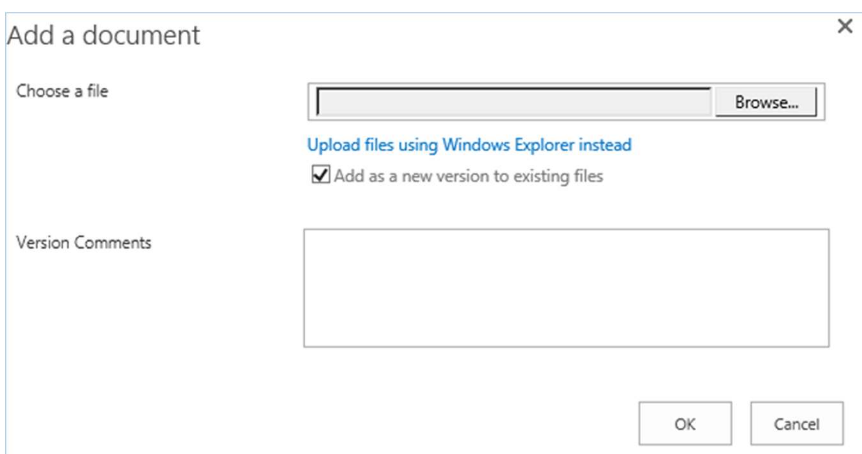
**To edit an item** and add discussion comments:

- Click on the Edit icon next to Info Request ID. An editing screen will open.
- Edit any incorrect item and save, or;
- Scroll to Discussion Comments.
    - Click Discussion Comments "New Item" link to add Agency comments. DMS will add responses In the DMS Response field.
        - Comments can be revised

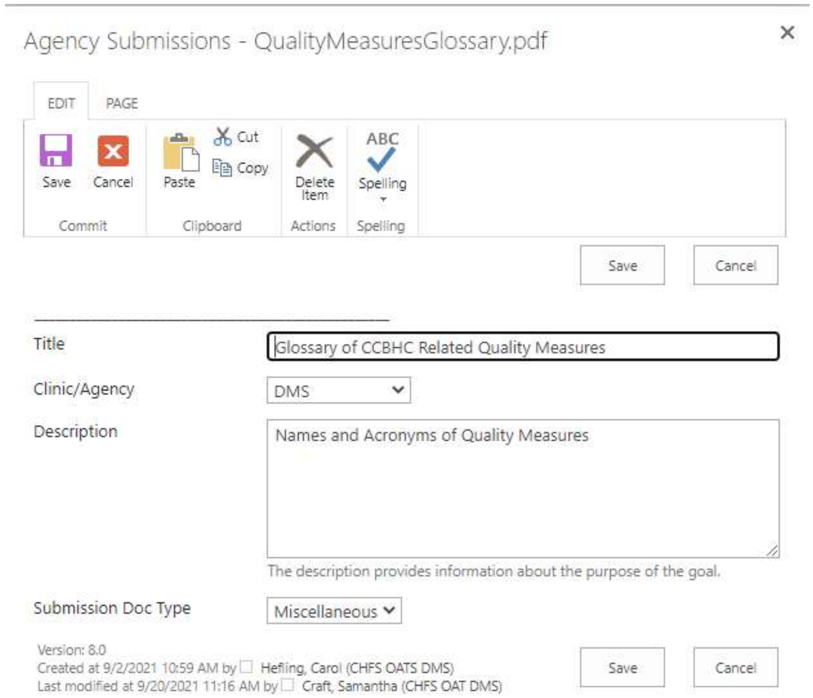
## Agency Submissions

Any reports, forms or completed templates requested or required by DMS will be uploaded here. This will include the Quality Measures workbook. Once the workbook template is completed by the Agency, the final report will be uploaded here. To add a new report, form or document, etc.., follow the steps below:

- Click on new document link
- Click on Browse button to browse for the file needed
- Version Comments are optional and not necessary
- Click OK button




Once select OK, you will be navigated to the Information screen.




- Enter Title of document
- Select Agency from dropdown
- Enter description of the report
- Select a Submission Doc Type from the dropdown
- Verify agency was selected. Click Save button
- Note: System does not allow for duplicate files, therefore it is good practice to add initials and date to the filename.
- Once Save is selected, you will be navigated back to Report Submission dashboard where the report that was just uploaded will be listed under a folder for Report type.