

OASAS Web-based Applications Tips

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8:00 am – 5:00pm, Monday - Friday FAX

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Microsoft Edge – Setting the application website as a trusted site

Warning – In some cases your trusted sites are maintained by your administrator and you won't be able to add or remove your trusted sites.

Setting the application website up as a trusted site will help to eliminate security and other pop-up prompts that might be bothersome. These steps will assign the web site to Trusted Security Zone:

1. Open the Windows start menu and type "Control Panel".
2. Click on "Network and Internet".
3. Click on "Internet Options".
4. In the pop up window click "Security tab"
5. Click the **Trusted sites** zone.
6. Click **Sites**.
7. In the **Add this Web site to the zone** text box, type <https://apps.oasas.ny.gov>, and then click **Add**.

Pop-ups

Pop-ups must be allowed for this site. The reports will display a pop-up that is used to specify the parameters to be used (i.e., programs or transaction dates to be included). Please set your pop-up blocker to allow pop-ups for the <https://apps.oasas.ny.gov> website.

Logging In & Out

To login, click the login button on the OASAS application website ([https:// apps.oasas.ny.gov](https://apps.oasas.ny.gov)). Enter your OASAS user id and password.

To logout, click on the logout link or button in the upper right hand corner. After logging out of the OASAS application website, you will see briefly see a screen that shows you have been successfully logged out and then you will be returned to the OASAS application website. At this point, you can simply close the web browser (use the X in the upper right hand corner).

Session Expiration

On the web, you don't have a constant connection to the application. If you don't submit information for an extended period of time, your session will expire. You will get error messages from the applications when you try to process transactions. You will have to login again to initiate a new session.

Keyboard Navigation Tips

Tab Keys

The tab key will move the cursor from one field to the next. Shift-tab will move back one field.

Pulldown Lists

Entering a letter takes you to the first option beginning with that letter, repeating that letter will move to the second, etc. Repeatedly keying the letter will cycle through all values beginning with that letter. Arrow keys will also move up or down the options.







Checkboxes

You can use the Spacebar to turn the checkbox on.

Buttons

You can use the Enter (or Spacebar) key on a button to cause the action to occur. For example, if you tab to the Save button and hit the Enter key, the form will be saved.

Icons

Icon	Meaning	Description
	Required Item	Items preceded by this icon are required to be entered. Note that items not preceded by this icon may also be required because of cross edits with required items. For example, If the primary substance is "none", route of administration, frequency and age at first use are not required so there is no *. If it is a value other than "none", the route of administration, frequency and age at first use will be required.
	List of Values	Clicking on the flashlight will open a list of values box that will allow you to search for a value.
	Dates	The calendar icon will open a calendar date picker. This will open to the date in the field or today's date (if the field is blank). Note: Date fields require the full <u>four</u> digit year to be entered.
(mm/dd/yyyy)	Hint Text	The hint text explains the formatting, edits or other requirements for data in the field.
	Pulldown Lists	Clicking the down arrow displays all the options for that field. Keying a letter will display the first value that begins with that letter. Repeatedly keying the letter will cycle through all values that begin with that letter.
	Notepad	Used for entering text. It will display a separate browser window with a text editor.
	Checkbox	Clicking or using the spacebar in this field will turn the checkbox on.

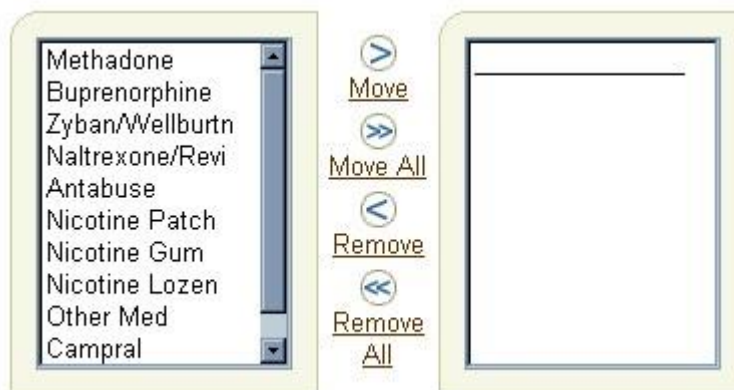
Sorting Results Sets

When searching for records, the screen will return a list of matching records. Frequently, you can sort these results sets by clicking the heading. If the heading appears to be shadowed, you can click that area to sort by the item. In the following heading, program number, Provider Client ID, Sex, Birth Date, Last 4 SSN, and Last Name 2 Char can all be used to sort the records.

Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char
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Shuttle Controls

Items that allow you to select several options such as the addiction medications list below are presented as shuttle controls. The > keys will move selected value(s) from one side to the other. To select multiples use either hold the shift or ctrl key while selecting the values.



Record Scrolling

When multiple records are returned for review, a scroll bar will appear. The pull-down list allows you to move rapidly to specific sets of records, next and previous will page through records 25 at a time.

Breadcrumbs

Some transactions will display a details button for editing specific information about the records. You may notice a link to the previous page from the current page. These links are called breadcrumbs that show your path to the current page. You can return to the previous page by clicking the link.



Printing Reports

When printing reports, there are two output types available: PDF and HTMLCSS

PDF

This format requires Adobe Acrobat Reader on your pc. This free software generally comes with the pc, but if not it can be downloaded from the Adobe website (<http://adobe.com>). The benefits of using the PDF format include: easy to save the report to a file on your computer; attach the report file to email; PDF version maintains proper pagination and formatting; allows you to search document; select text to copy; and print single or multiple pages.




HTMLCSS

This is the default web format. It will print, save and search like any other web page. Since it prints based on your default printer settings, the formatting, including the number of lines per page, will be variable. This format will not produce the quality that is available in the PDF version. It is available for those who cannot load the Adobe Acrobat Reader.

Client Data System (CDS) Application Tips

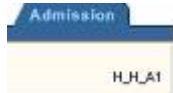
Buttons

Button	Description
	Returns to previous page
	Submits data entered for editing and moves to the next page of the transaction
	Submits data entered for editing and, if successful, saves the record
	Deletes transaction
	Submits search query based on the parameters entered on the search screen
	Presents details of the transaction selected. Generally, allows editing of transaction information.
	Displays a printable version of the page that eliminates graphic images
	Displays a new first page of the admission transaction without returning to the CDS home page
	Displays a new first page of the discharge transaction without returning to the CDS home page
	Displays a new first page of the crisis episode transaction without returning to the CDS home page
	Displays a new waiting list transaction page without returning to the CDS home page
	Displays client details and the episode history for selected client

 Home	Returns to the CDS home page
 Close Application	Closes the CDS application and the browser window
 Help	Displays the CDS help page

CDS Page ID

The CDS application has a variety of paths available to reach the same transaction page. In order to facilitate problem resolution, there is a CDS page ID located in the upper right hand corner under the page tab. When reporting a problem with the application, please include the page id on which the error occurred as well as the description of the error.

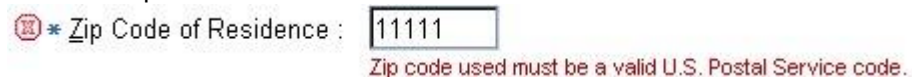


CDS Error Handling

All error messages related to a transaction are displayed at the top of the page after clicking the Save button. The error messages contain a link to the field in error and a description of the error.



The error message is also found on the field(s) in error. The field will be preceded by a red X and the error description can be found beneath the field.



CDS Action List

From the Client Management page, you can process transactions for existing clients. After the client is selected, the link to various actions will allow you to enter a transaction for that client without going back to the CDS Home Page. Select the transaction from the list.

[Admission](#)

[Discharge](#)

[Treatment Update](#)

[Element Transition](#)

[Crisis Episode](#)

[Client Management](#)






[Transfer](#)

[Assessment](#)

[Waiting List](#)

Provider Directory System (PDS) Application Tips

Buttons

Button	Description
	Submits data entered for editing and, if successful, saves the record
	Submits search query based on the parameters entered on the search screen
	Presents details of the transaction selected. Generally, allows editing of transaction information.
	Deletes transaction
	Returns to the OASAS Applications home page