DBHDS
Virginia Department of
Behavioral Health and
Developmental Services

DELTA User's Manual

DBHDS DELTA User's Manual

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1.0 DELTA Overview

1.1 DELTA Program

DELTA is the web-based security portal used by the Department of Behavioral Health and Developmental Services (DBHDS) to ensure the privacy and protection of the health information records used by the State Facilities, Community Service Boards (CSBs), and private providers. Each user that works with DBHDS applications such as the Intellectual Disability On-Line System (IDOLS) and the Computerized Human Rights Information System (CHRIS) must first log in to the DELTA system to access the applications.

1.2 DELTA Roles

To safeguard the level of security required for private health records, there are different types of DELTA roles. Each provider needs to fill each of these roles. Depending on the size of the provider's organization, one person may fulfill multiple DELTA roles, but every user at a provider should not have the accesses for all roles. Single person providers will be the exception to this rule. There should be a primary contact for each DELTA role, as well as a backup.

1.2.1 Supervisor

The DELTA Supervisor (Supervisor) is chosen by the agency head to manage the DELTA accounts for their location. The Supervisor role is assigned to individuals who are familiar with the agency's employees and their responsibilities, and how those responsibilities relate to the DBHDS applications. The Supervisors also know when an employee joins or leaves their organization. Supervisors request accounts for the users at their location. If an agency's size requires it, there may be more than one DELTA Supervisor for that agency.

1.2.2 Security Officer

The DELTA Security Officer (Security Officer) is chosen by the agency head to approve the DELTA accounts for their location. The Security Officers are able to validate that users have completed annual HIPAA and any other required security training. Security Officers approve or deny the accounts that have been requested for their location. Security Officers also help users with password resets.   If an agency's size requires it, there may be more than one DELTA Security Officer for that agency.

1.2.3 Local Administrator

The Local Administrator (Local Admin) is selected by the DELTA Supervisor and is the primary contact at an agency for a particular DBHDS application or applications. The Local Admin is familiar with the application and the access each user of the application needs. Each agency can have one Local Admin for all DBHDS applications used at their location, or a Local Admin may be assigned to each separate application. Once accounts have been requested and approved, the Local Admin approves the requests for application accesses needed by users to perform their jobs.

1.2.4 DELTA Users

Anyone who uses DBHDS applications to perform a specific job or function is a DELTA User (User). Users have access only to the particular application and data needed to complete their tasks. If additional access is needed, the DELTA Supervisor must request a change to the User's account.

If you are a DELTA Supervisor, Security Officer, or Local Administrator you are still a DELTA user. You will still have the accesses you need to complete your DBHDS application tasks.

2.0 Managing DELTA Accounts

Each of the DELTA roles performs specific tasks to manage DELTA accounts. These tasks are not part of the DBHDS applications (i.e., IDOLS or CHRIS), but are done only for DELTA.

The tasks completed by the DELTA Supervisor are:
- requesting DELTA accounts for new DELTA Supervisors, Security Officers, Local Administrators and Users who have never used the DELTA portal before
- requesting Application access for new users
- requesting modifications to a user's application access
- revoking a user's application access

The tasks completed by the DELTA Security Officer are:
- approving or denying pending DELTA account access
- resetting passwords

The tasks completed by the Local Administrator are:
- approving or denying pending DBHDS application access

DELTA Users do not perform any specific DELTA tasks.

2.1 Creating DELTA Accounts

Before any user can access DBHDS applications, they must first logon through the DELTA security portal. Each provider must set up their users with DELTA accounts. Figure 2.1-1 shows the steps to create DELTA accounts.

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1. **Provider*** fills out the "DELTA-Production Account Request Form". Requests a Supervisor, Security Officer & Local Administrator.

* Provider refers to state facilities, CSBs, and private providers.

Form sent to DBHDS and initial accounts set up. Email sent to the new DELTA Supervisor, Security Officer & Local Admin when accounts are ready.

2. **DELTA Supervisor** follows Section 2.1.2 to request accounts for users at his/her site.

Email notification sent to DELTA **Security Officer** that account requests are pending.

3. **DELTA Security Officer** follows Section 2.1.3 to approve/deny account requests.

Email notification sent to DELTA **User**s that accounts are ready for user setup.

4. **DELTA User** logons to DELTA. Follows prompts to change password and setup security question. User does not have access to DBHDS applications yet.

Email notification sent to DELTA **Local Administrator** that account request is pending.

5. **Local Administrator** follows Section 2.1.4 to approve/deny account requests.

6. **DELTA User** now has access to DBHDS apps. When logs back on, will be able to select app tasks to complete.

Figure 2.1-1 Creating DELTA Accounts

2.1.1 Production Account Request

The first task in creating an account is completed by the provider's manager. The manager requests DBHDS assignment of the Security Officer role(s) and the Supervisor role(s). This request is made with the **DELTA – Production Account Request Form**. This form can be found http://www.dbhds.virginia.gove/delta_help. One form is completed for each person, indicating which role he/she will fulfill.

1. Open the **DELTA-Production Account Request Form**. This is a Microsoft Word document (those agencies using MS Word 2003 will use the ".doc" version and those using Word 2007 or newer will use the ".docx" version).

2. Fill in all required fields. To create a DELTA Supervisor account, select **Supervisor** for **Location Role**. All required fields are marked with an asterisk.

3. Save the form. Send as an email attachment to DBHDS at the address at the top of the form.

4. Repeat these steps to create a DELTA Security Officer, selecting **Security Officer** for **Location Role**; and repeat again selecting **Local Admin** for the **Location** Role. You may select more than one application for the **Location Role** for your **Local Admin.** NOTE: If a single person is filling multiple DELTA roles, the form may be filled out once and all appropriate DELTA **Location Roles** should be checked.

DBHDS
Virginia Department of
Behavioral Health and
Developmental Services

DELTA-Production Account Request Form

Submit completed form via email to: deltaprod@dbhds.virginia.gov

DELTA-PROD USER INFORMATION	
Location* (Agency Name)	Provider A
NPI/API* (number)	9876
Email*	JSmithFairfaxCSB@gmail.com
First Name*	John
Middle Name	Click here to enter text.
Last Name*	Smith
Position/Title	Click here to enter text.
Mailing Address	Click here to enter text.
City, State, Zip	Click here to enter text., Click here to enter text. Click here to ente
Phone Number*	703-555-1235
Fax Number	Click here to enter text.
Location Role*	☑ Supervisor ☐ Security Officer ☐ IDOLS Local Admin ☐ CHRIS Local Admin

* Required Field

Dear John Smith,

You have been assigned an account in the DELTA application at Virginia's Department of Behavioral Health and Developmental Services (DBHDS). DELTA is DBHDS' security portal to our web applications.
Following are your user account details:
Username: JSb12f33
Initial Password: d6erOV%0
Email: JSmithFairfaxcsb@gmail.com
Title:
Location: Provider A
Phone Number: 703-555-1235
Fax Number:

When you logon to DELTA for the first time, you will be prompted to change your password and set up your security questions. You must complete this step by 10/5/2012. Also, specific application access will not be granted until you have completed this step.

Please do not reply to this email, this is a system generated notification.
If you need any further assistance, please contact your DELTA Security Officer for support.
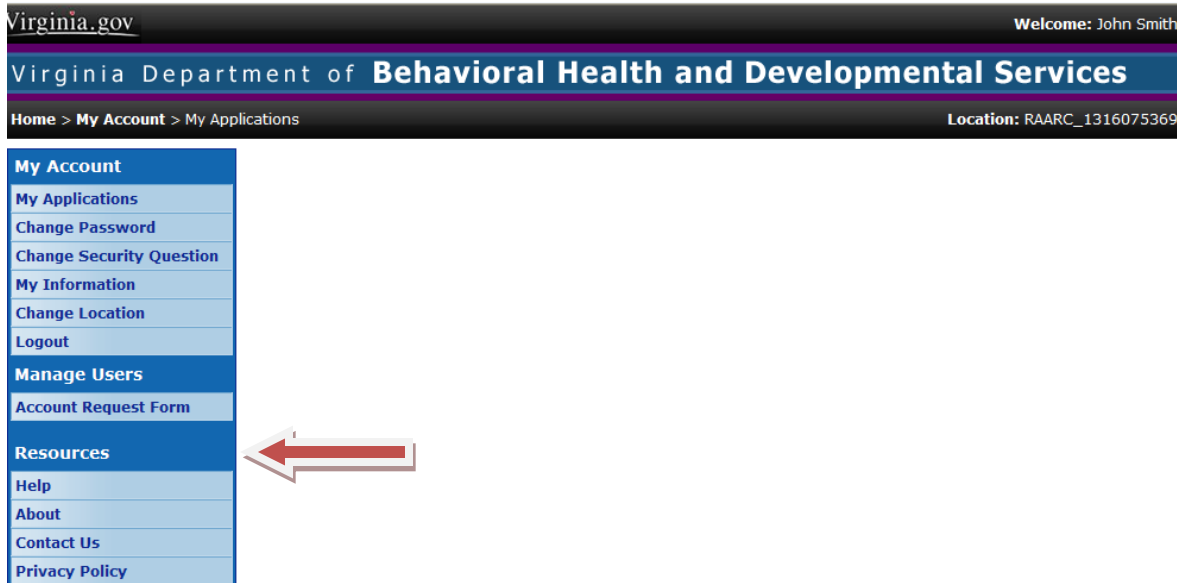
5. When the forms are submitted, DBHDS will create these DELTA accounts. The Supervisor, Security Officer, and Local Administrator will receive email notification of approval to access DELTA.

2.1.2 DELTA Supervisor Tasks for Creating DELTA Accounts
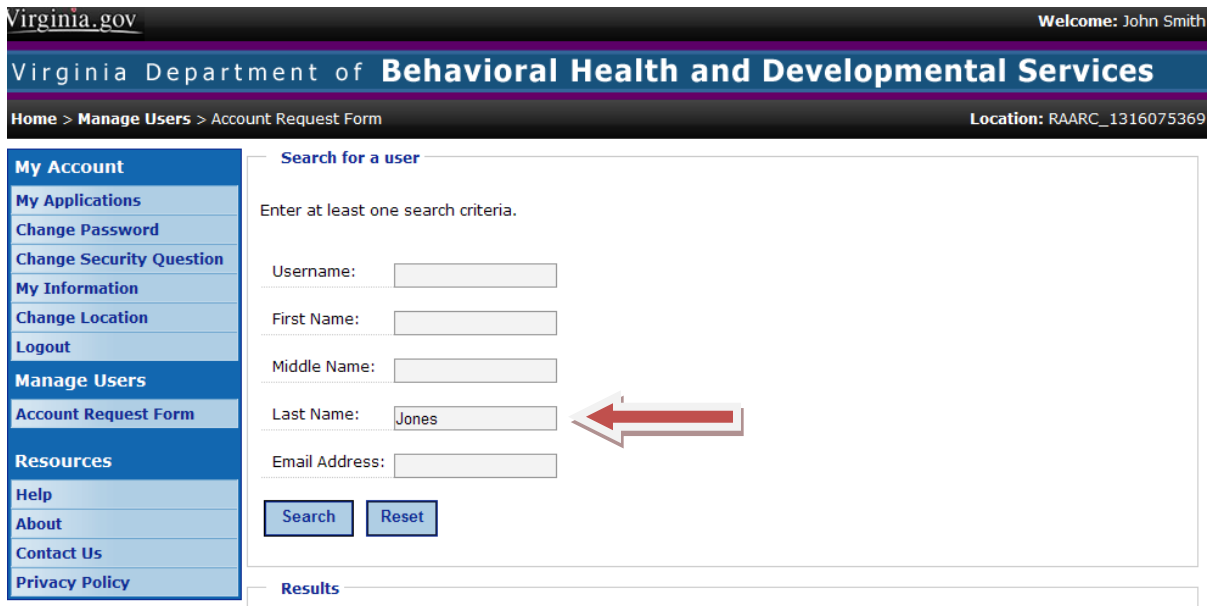
The DELTA Supervisor begins the creation of all user accounts at the provider's location. All of these steps are accomplished within DELTA.

1. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov**. Logon to DELTA, following the steps outlined in Section 3.1, Logging In to Delta.

2. Click **Account Request Form** under the **Manage Users** menu.

3. Search for the user. This search returns users not only for your location, but all users in DELTA. In this way, a person who works at multiple locations can use the same Username and Password for all locations. Therefore, before you can determine whether the request is for a new user, you must perform a search of all users. Enter at least 1 search criteria, such as Last Name. Each field in the search finds potential matches based on the value entered as any part of the value

and values that sound like the value entered. Click **Search** to perform the search and display the results.

4. The results are displayed at the bottom of the screen. If your user is not displayed, click **New User**. If your user is displayed, click **Select** next to the Username to choose that user for your account request.

5. If you selected a user who already exists in DELTA, skip to Step 7. If you chose to request a New User account, you will be asked to enter details for that user. **Email** is required, must be unique among all accounts in DELTA, and must be in the proper format for an email address. **First Name** and **Last Name** are required. **Middle Name** is not required, but provides additional information about the user that could be helpful in distinguishing this user from another in DELTA with the same first and last names. **Position** provides valuable information as well but is not required. It can help the DELTA Security Officers and Local Administrators determine whether appropriate permissions are being requested for this account. **Address, City, State,** and **Zip Code** should be the user's primary contact address. Since this is a new user, it is usually the address for the provider. **Zip Code** only supports a 5-digit code. **Phone Number** is particularly useful for DELTA Supervisors, Security Officers, and Local Administrators. Complete contact information for a user is important to have in case issues arise. **Phone Number** must include area code. Finally, **Fax Number** is the last piece of contact information and must include the area code. Click **Next** to submit the information and continue.

6. On the **Account Request** screen, the user's first and last names are listed. The provider's location is listed in blue. If this is a new location for the account, the **Effective From Date** defaults to the current date. If the user will not begin working at the new location until a later date, change the **Effective From Date** to the date the user will begin work. The **Effective Through Date** is left blank unless the user is terminating from your location or their responsibilities have changed such that they should no longer have access to DELTA; in these cases, see Section 2.2 Maintaining DELTA Accounts for more information. The **Supervisor** and **Security Officer** fields should be checked only if the new user will also be an additional or backup DELTA Supervisor and/or DELTA Security Officer at your location.

7. On the **Account Request** screen, each application that your location may use is listed in separate sections below the location. The name of the application is in blue. Check **Local Admin** only if the new user will be a DELTA Local Administrator for that application. If the user needs to have access to the application, select a **Role Request Type** (**New** for new accounts). You will also need to select a **Role** from the drop-down menu. Scroll to the bottom of the screen and click **Submit** to submit the account request. In order to submit a request, at least 1 permission change must have been made. A permission change includes DELTA Supervisor, DELTA Security Officer, DELTA Local Administrator, and application Role.

NOTE: **Role** is specific to each application and each user can only have 1 role per application (for example, CSB Waitlist Approver in IDOLS). The DELTA Supervisors must be familiar with the DBHDS applications and their roles, as used in their agency.

8. After a request is submitted, the **Account Request Summary** is displayed that shows the details of the request. If you have other user accounts to request, click **New Account Request**. If you are done making requests, click **Finished.**

2.1.3 DELTA Security Officer Tasks for Creating DELTA Accounts

The DELTA Security Officer is the next DELTA role to take action. A user's account isn't created until you, as the DELTA Security Officer, approve the request.

```
***** DELTA  Email Notification *****

A new account request has been submitted for Albert Jones to have access
to DELTA for RAARC_1316075369.  Please process this request at your
earliest convenience.

Please do not reply to this email, this is a system generated notification.
If you need any further assistance, please contact your DELTA Security
Officer for support.
```

1. When a DELTA Supervisor submits a new account request, you receive an email notification.

2. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov.**   Logon to DELTA, following the steps outlined in Section 3.1, Logging In to Delta.

3. Click **Pending Account Requests** under the **Manage Users** menu.

4. A listing of all new account requests waiting for approval is displayed. Click **Process** next to a Username to process that account request.

5. The details of the account are displayed. An account is approved or denied as a whole. Review the **Request Summary** carefully before approving to ensure the appropriate permissions have been requested for grant, change, or revoke. Click **Approve** for the request to create the user's account. If <u>any</u> part of the request should not be approved, click **Deny**. If you denied the request, you will be prompted for a Denial Reason. Select a reason from the menu and click **Save.**
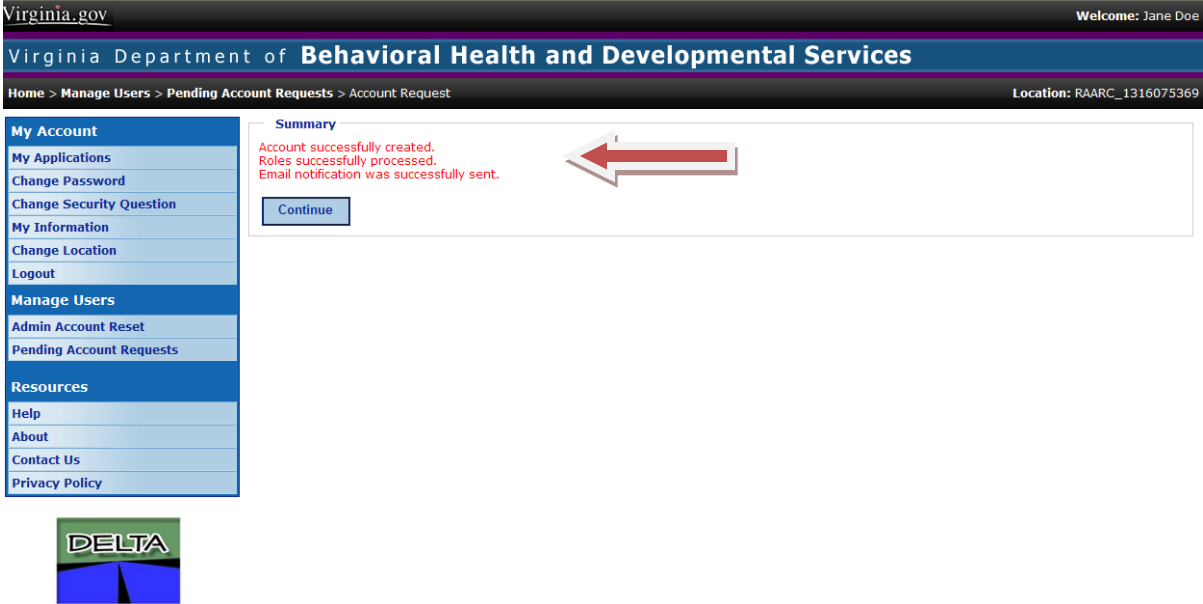
6. A summary screen showing the actions taken is displayed.

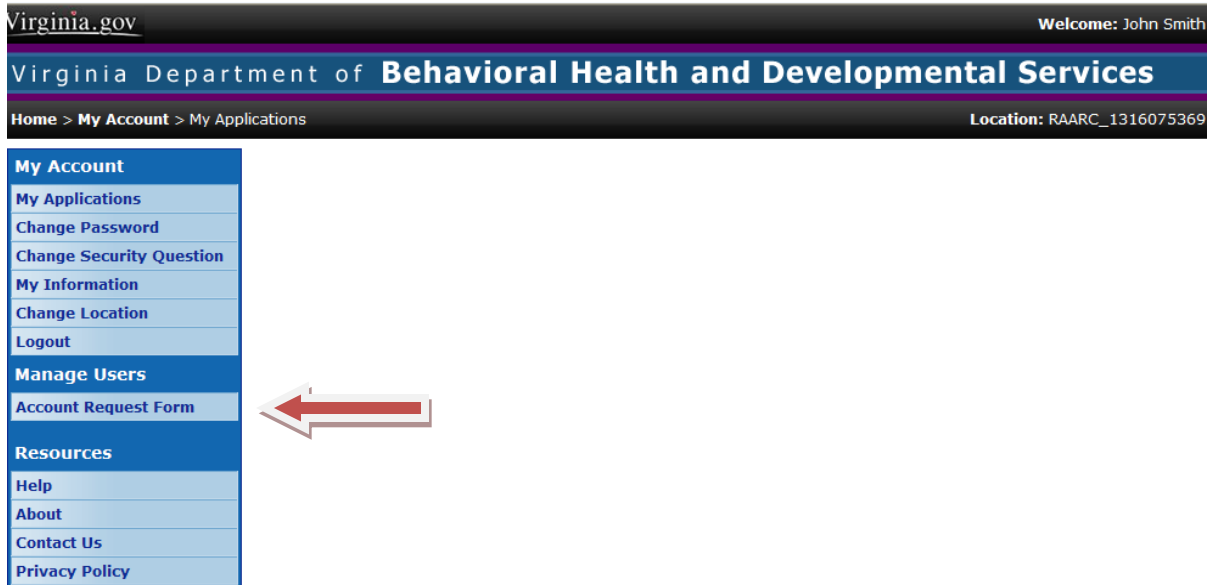## 2.1.4 DELTA User Tasks for Creating DELTA Accounts

The next steps for creating a DELTA account are taken by the actual user of the account. Until the DELTA user logs into DELTA for the first time, changes the temporary password, and sets up the security question, application access cannot be granted.

> Dear Albert Jones,
>
> You have been assigned an account in the DELTA application at Virginia's Department of Behavioral Health and Developmental Services (DBHDS). DELTA is DBHDS' security portal to our web applications.
>
> Following are your user account details:
> Username: AJ521618
> Initial Password: x7ktEG!3
> Email: AJonesFairfaxcsb@gmail.com
> Title:
> Location: RAARC_1316075369
> Phone Number:
> Fax Number:
>
> When you logon to DELTA for the first time, you will be prompted to change your password and set up your security questions. You must complete this step by 10/8/2012. Also, specific application access will not be granted until you have completed this step.
>
> Please do not reply to this email, this is a system generated notification. If you need any further assistance, please contact your DELTA Security Officer for support.

1. When the DELTA Security Officer has approved the request for your account, you will receive an email notification. The email will contain your Username and a temporary password. You will not yet have access to any DBHDS application.

2. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov**

3. Enter **Username** and **Password** from your email. If you are assigned to more than 1 location, a drop down menu will be displayed. Select the location you are currently working.

4. The **Change Password** screen will be displayed. Enter your temporary **Password** from your email. Enter a **New Password**. Enter the new password again to **Confirm New Password**. Click **Change Password** to update and save.

   NOTE: Password Tips:
   - Passwords must have the following complexity:
     - o At least 8 characters long; and
     - o Use at least 3 of the following 4:
       - Special characters
       - Alpha characters
       - Numerical characters
       - Combination of upper and lower case

5. A confirmation screen will displayed.

6. The **Change Security Question** screen will be displayed. Enter your new **Password**. Select a security question from the menu. Enter the **Security Answer**. Click **Save Answer** to update your record.

7. A confirmation screen will be displayed. At this time, you can logout of DELTA.

2.1.5 DELTA Local Administrator Tasks for Creating DELTA Accounts

The last step to creating DELTA is to approve the request for a user's permissions to DBHDS applications. This is done by the DELTA Local Administrator.

***** DELTA Email Notification *****

A new application access request has been submitted for Albert Jones to have access to IDOLSTest for RAARC_1316075369. Please process this request at your earliest convenience.

Please do not reply to this email, this is a system generated notification.
If you need any further assistance, please contact your DELTA Security Officer for support.
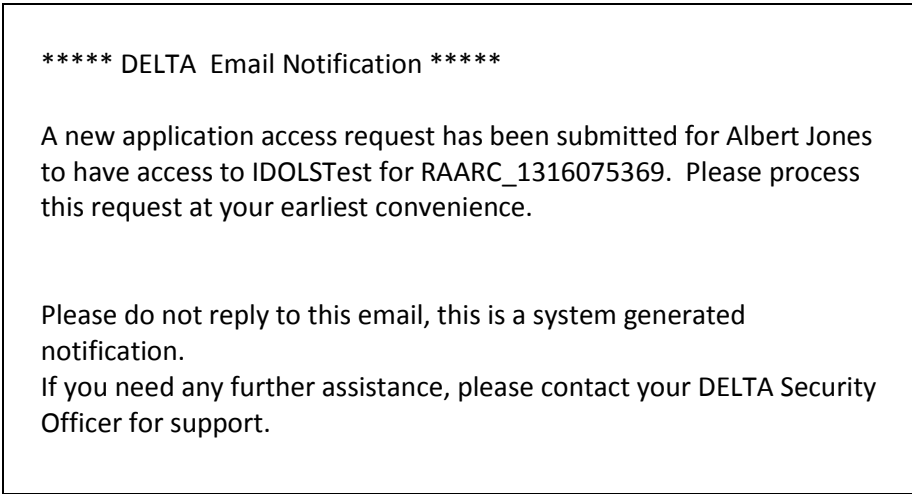
1. After the DELTA Security Officer approves the account request and the new user has logged into DELTA for the first time, you will receive an email notification.

2. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov.**   Logon to DELTA, following the steps outlined in Section 3.1, Logging In to Delta.

3. Click **Pending Application Requests** in the **Manage Users** menu.

4. A listing of submitted application access requests is displayed. Click **Process** next to a Username to process that request.
   NOTE: If you are a Local Administrator for multiple DBHDS applications, you will be shown a drop down menu to select the application to process requests. However, if you are the Local Administrator for only 1 application, that application will already be selected.

5. The details of the request are displayed. An application request is approved or denied as a whole. Review the **Request Summary** carefully before approving to ensure the appropriate permissions have been requested. Click **Approve** to update the user's access to an application.

If <u>any</u> part of the request should not be approved, click **Deny**. If you denied the request, you will be prompted for a Denial Reason. Select a reason from the menu and click **Save.**

6. A summary screen showing the actions taken is displayed.

2.2 Modifying DELTA Accounts

Once the DELTA accounts have been created and are being used, it may be necessary to make changes to the accounts. If a staff person's role in a DBHDS application (for example, IDOLS) changes, the access to the application must be modified as well. If a staff person leaves a job, access to the applications and data must be revoked.

2.2.1 Modifying a DELTA User's Application Access
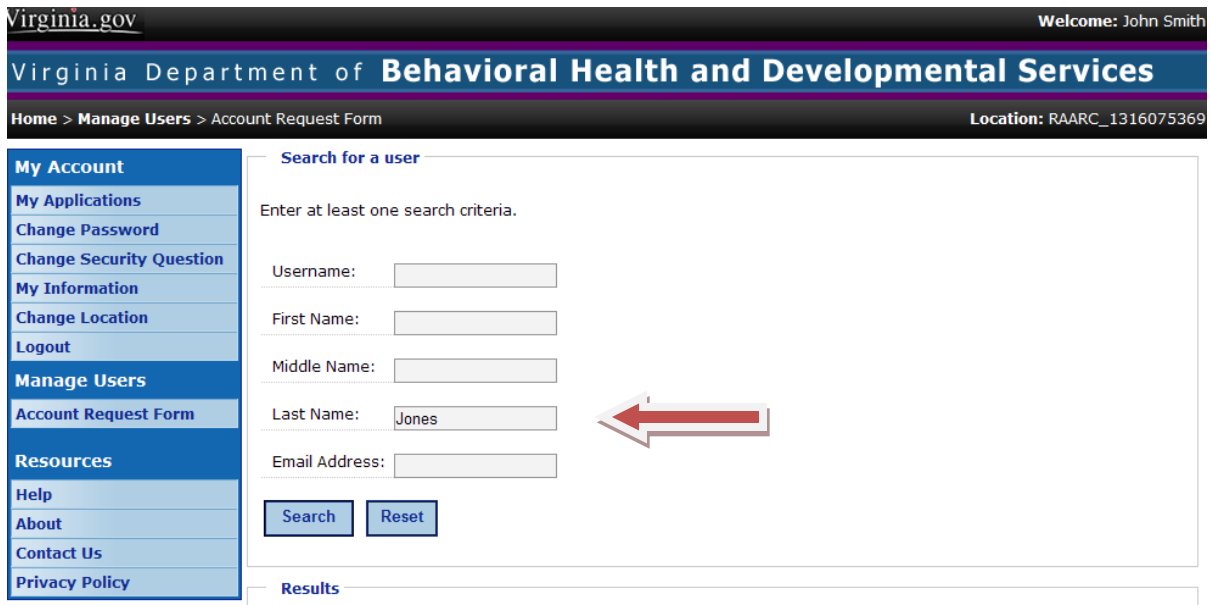
The DELTA Supervisor requests and the DELTA Local Administrator approves the modifications to a user's account ensuring the user has the appropriate privileges to complete his or her tasks.

1. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov.** Logon to DELTA, following the steps outlined in Section 3.1, Logging In to Delta.

2. Click **Account Request Form** under the **Manage Users** menu.

3. Search for the user. Enter at least 1 search criteria, such as Last Name. Each field in the search finds potential matches based on the value entered as any part of the value entered. Click **Search** to perform the search and display the results.

4. The results are displayed at the bottom of the screen. Click **Select** next to the Username to choose that user for your account request.

5. The **Access Request** form will be displayed with the user's current application role. Select **Change** for the **Role Request Type**. Select the new **Role** for the user. Click on **Submit** to process the change.

   NOTE: **Role** is specific to each application and each user can only have 1 role per application (for example, CSB Waitlist Approver in IDOLS). The DELTA Supervisors must be familiar with the DBHDS applications and their roles, as used in their agency.

6. After a request is submitted, the **Request Summary** is displayed that shows the details of the request. If you have other user accounts to request, click **New Account Request**. If you are done making requests, click **Finished.**

***** DELTA Email Notification *****

A new application access request has been submitted for Albert Jones to have access to IDOLSTest for RAARC_1316075369. Please process this request at your earliest convenience.

Please do not reply to this email, this is a system generated notification.
If you need any further assistance, please contact your DELTA Security Officer for support.

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7. The DELTA Local Administrator receives an email message to process the user's account.

8. The DELTA Local Administrator enters DELTA from the DBHDS website **http://www.dbhds.virginia.gov.**   Logon to DELTA, following the steps outlined in Section 3.1, Logging In to Delta.

9. Click **Pending Application Requests** in the **Manage Users** menu.

10. A listing of submitted application access requests is displayed. Click **Process** next to a Username to process that request.
    NOTE: If you are a Local Administrator for multiple DBHDS applications, you will be shown a drop down menu to select the application to process requests. However, if you are the Local Administrator for only 1 application, that application will already be selected.

11. The details of the request are displayed. An application request is approved or denied as a whole. Review the **Request Summary** carefully before approving to ensure the appropriate permissions have been requested. Click **Approve** to update the user's access to an application. If <u>any</u> part of the request should not be approved, click **Deny**. If you denied the request, you will be prompted for a Denial Reason. Select a reason from the menu and click **Save.**

12. A summary screen showing the actions taken is displayed.

2.2.2 Revoking DELTA User's Application Access
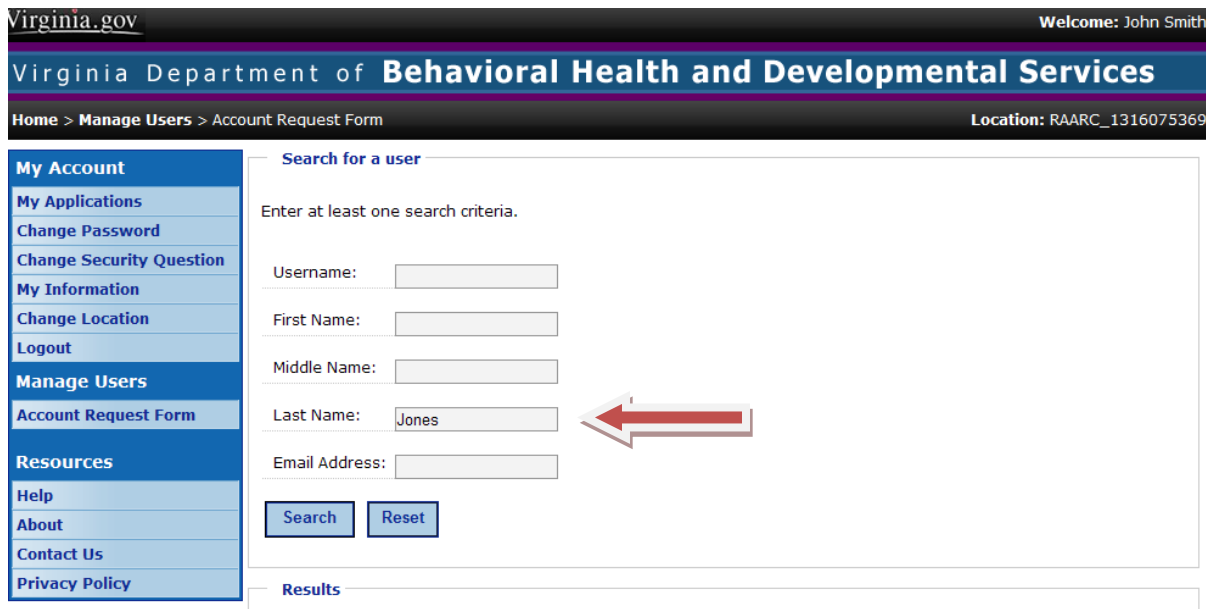
When a staff member is no longer working at your location, the DELTA Supervisor must revoke his or her access to DELTA and the DBHDS applications used at your location.

1. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov**. Logon to DELTA, following the steps outlined in Section 3.1, Logging In to Delta.

2. Click **Account Request Form** under the **Manage Users** menu.

3. Search for the user.   Enter at least 1 search criteria, such as Last Name. Each field in the search finds potential matches based on the value entered as any part of the value and values that sound like the value entered. Click **Search** to perform the search and display the results.

4. The results are displayed at the bottom of the screen. Click **Select** next to the Username to choose that user for your account request.

5. The **Access Request** form will be displayed with the user's current application role. Enter the **Effective Through** date. The **Effective Through** date is the date the staff member no longer needs access to DELTA. Click **Submit** to process the request.

3.0 Using DELTA

3.1 Logging In to DELTA

3.1.1 New Users

1. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov**

2. Enter **Username** and **Password** from your email.

3. The **Change Password** screen will be displayed. Enter your temporary **Password** from your email. Enter a **New Password**. Enter the new password again to **Confirm New Password**. Click **Change Password** to update and save.

    NOTE: Password Tips:
    - Passwords must have the following complexity:
        o At least 8 characters long; and
        o Use at least 3 of the following 4:
            ▪ Special characters
            ▪ Alpha characters
            ▪ Numerical characters
            ▪ Combination of upper and lower case

4. A confirmation screen will displayed.

5. The **Change Security Question** screen will be displayed. Enter your **Password**. Select a security question from the menu. Enter the **Security Answer**. Click **Save Answer** to update your record.

6. A confirmation screen will be displayed. Click **Continue**. You will be returned to the main DELTA screen and can select the DBHDS application you wish to use.

3.1.2 Returning Users

1. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov**
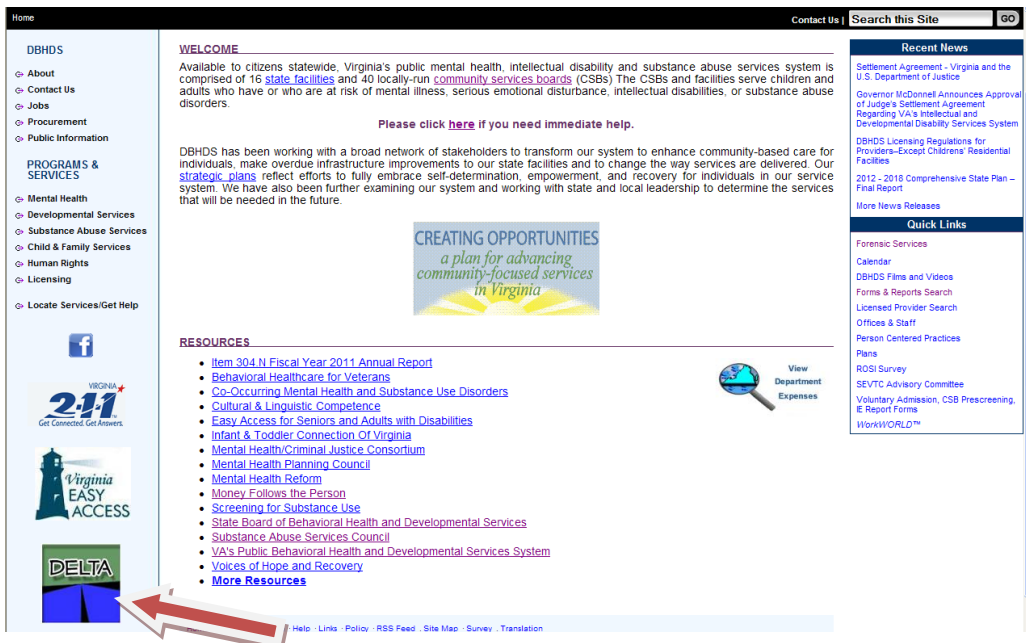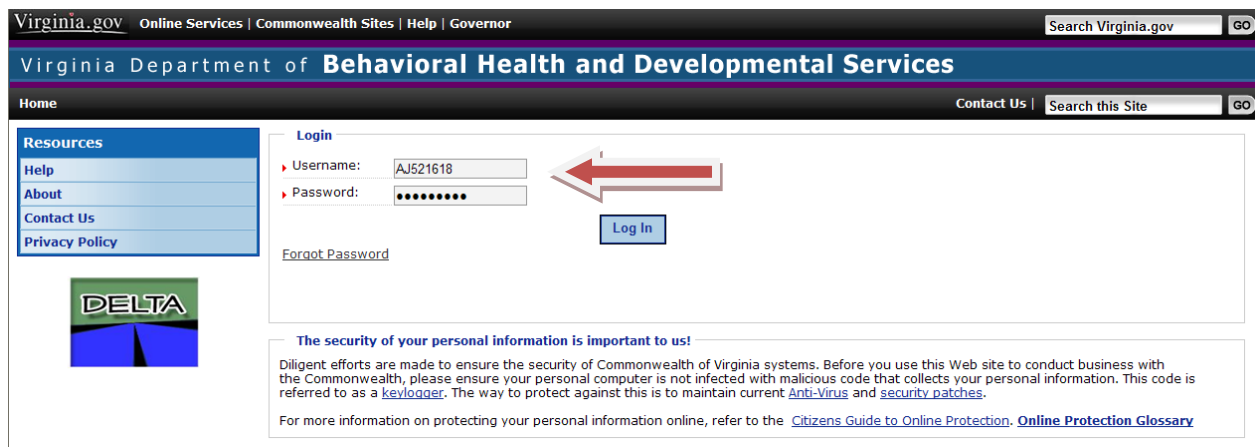
2. Enter **Username** and **Password**

3.1.2.1 Forgot Password

If you have forgotten your password, there are two ways to get it reset:

- If you know your location's DELTA Security Officer, you may contact him or her directly and request your password be reset;

- You may use the **Forgot Password** button on the DELTA login screen.

1. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov**

2. Click **Forgot Password**.

3. The **Forgot Password** screen is displayed. Enter your **Username**. Click **Submit**.

4. Your security question will be displayed on the screen. You must answer the question correctly for your password to be reset. Click **Submit** for a temporary password to be created.

Dear Albert Jones,

A temporary password has been assigned to your account in DELTA. The next time you log in to DELTA, you will be prompted to change your password.

Temporary Password:)vj77[8*I^D?8I

Please do not reply to this email, this is a system generated notification. If you need any further assistance, please contact your DELTA Security Officer for support.

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5. You will receive an email notification with your new temporary password. When you logon back on to DELTA, you will be prompted to update your password and security questions, just like a new user (see Section 3.1.1 of this User's Manual).

3.1.2.2 Resetting Password

One of the tasks completed by the DELTA Security Officer is to reset passwords because a user has forgotten a username and password or, a user has incorrectly entered his or her password three times and has been locked out of his or her account and has contacted you for help.
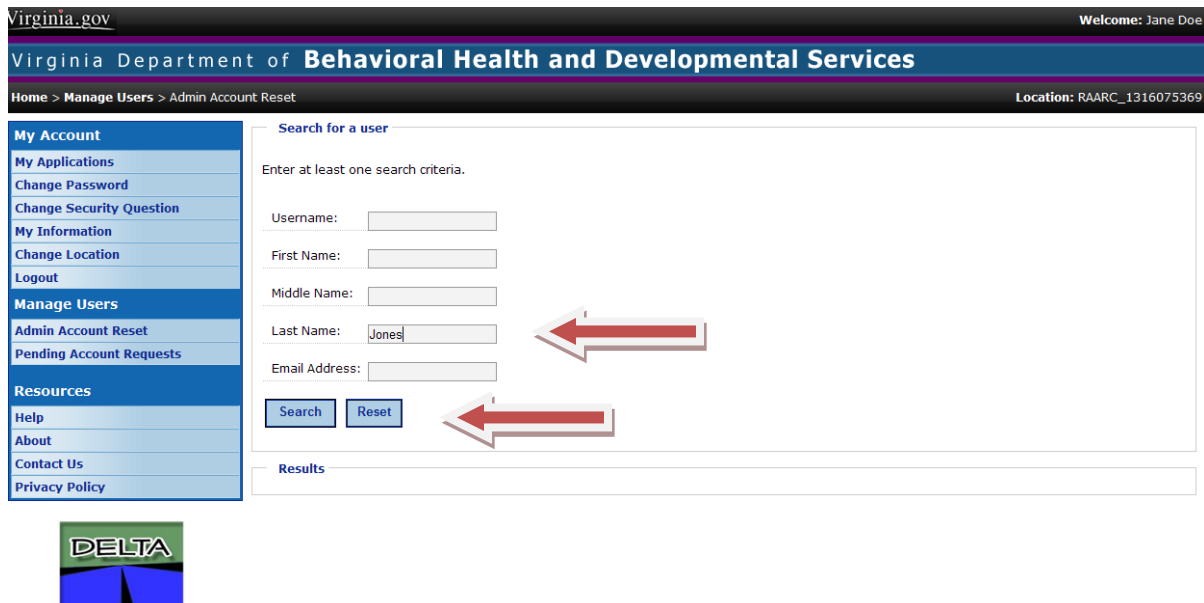
1. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov**. Logon to DELTA, following the steps outlined in Section 3.1, Logging In to Delta.

2. Select **Admin Account Reset** from the **Manage Users** menu.

3. The **Search for a User** screen is displayed. Enter at least one search criteria. Select **Search.**

4. The results are displayed at the bottom of the screen. Click **Select** next to the Username to choose that user for your account request.


5. The **Administrative Account Reset** screen is displayed with the user's account information listed. Click **Reset Password** and a new password will be created. The user will receive an email notification of the new password.

3.2 Account Maintenance

3.2.1 Changing Password

Currently, DELTA passwords expire every 90 days. DELTA will display a notification each time you log in for 14 days prior to password expiration. You will need to change your password before it expires

1. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov**. Logon to DELTA, following the steps outlined in Section 3.1, Logging In to Delta.
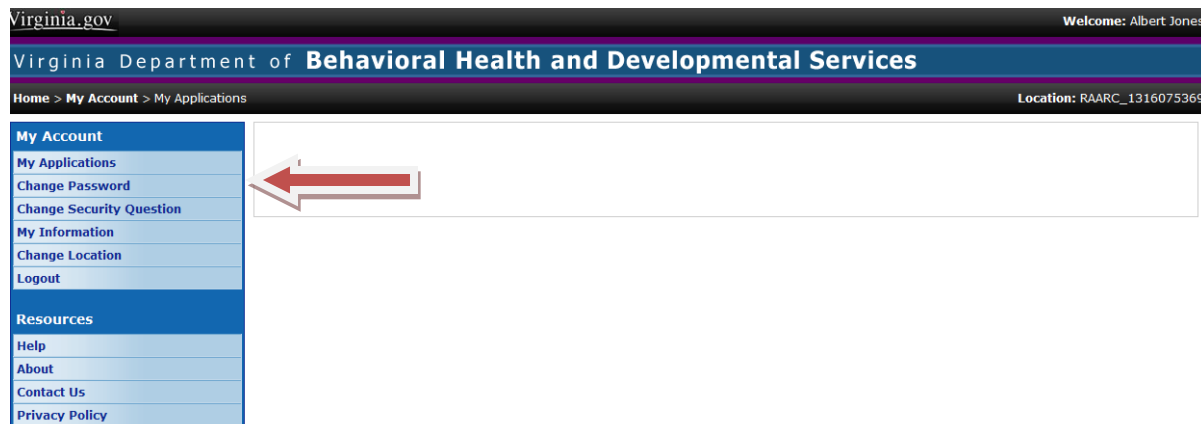
2. Select **Change Password** from the **My Account** menu.
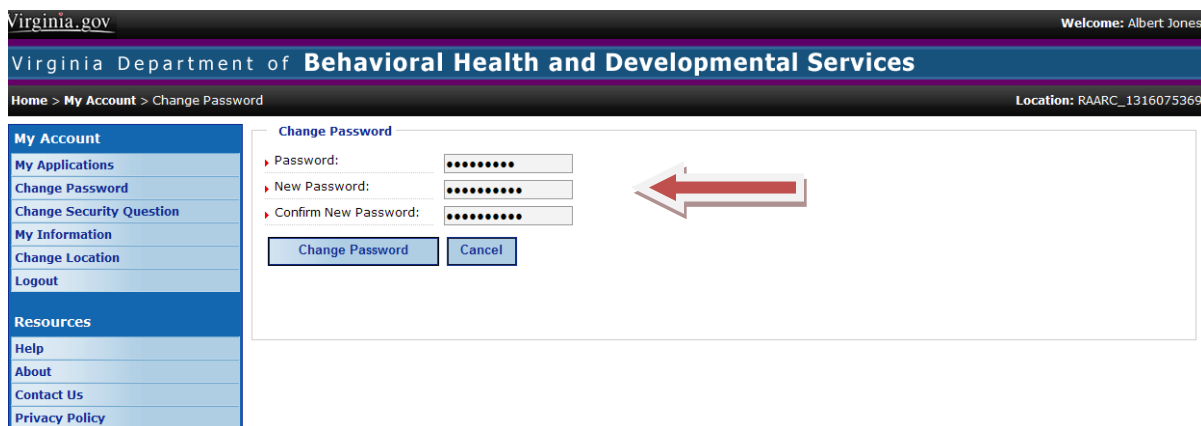
3. Enter your current **Password**. Enter your **New Password**. Enter the new password again to **Confirm New Password**. Click **Change Password** to process the request.
   **NOTE:** Password Tips:

- Passwords must have the following complexity:
  - At least 8 characters long; and
  - Use at least 3 of the following 4:
    - Special characters
    - Alpha characters
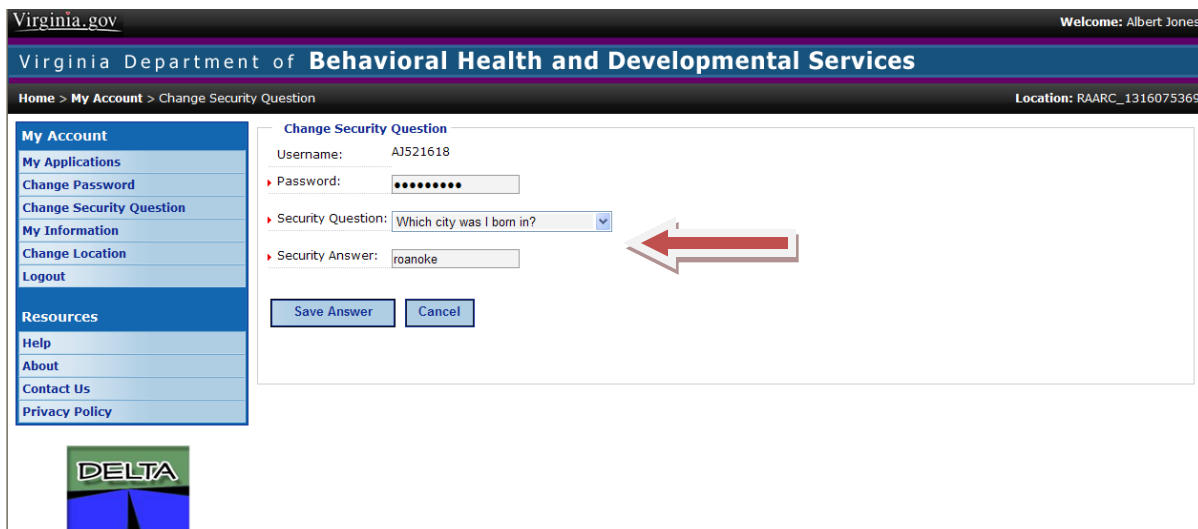   - Numerical characters
    - Combination of upper and lower case

3.2.2 Changing Security Question

You may change your Security Question at any time.

1. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov.**   Logon to DELTA, following the steps outlined in Section 3.1, Logging In to Delta.
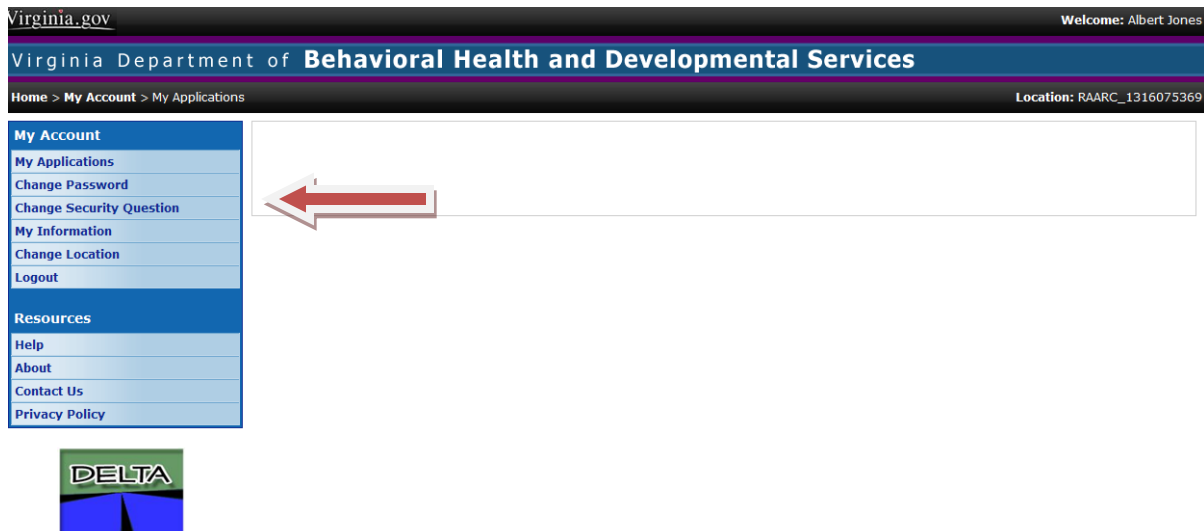
2. Select **Change Security Question** from the **My Account** menu.

3. The **Change Security Question** screen is displayed. Enter your **Password**, select a new **Security Question** from the drop down menu, enter the **Security Answer**, and click **Save Answer** t process the request. Security answers are not case sensitive.

3.2.3 Updating "My Information"

Use the **My Information** page to change your name, position, email address, mailing address, and phone and fax numbers. Once your account has been created, it is your responsibility to ensure this information is up to date.

1. Enter DELTA from the DBHDS website **http://www.dbhds.virginia.gov.**   Logon to DELTA, following the steps outlined in Section 3.1, Logging In to Delta.

2. Select **My Information** from the **My Account** menu.

3. Your profile data will be listed. Make the necessary updates and select **Save** to process the changes.

3.3 Using DBHDS Applications in DELTA

3.3.1 Launching Applications

DELTA is the DBHDS' single sign-on solution and security portal. It provides our business partners **access** to the DBHDS web applications. Because the applications contain protected health information, each user will have access only to the application(s) necessary to complete his or her tasks. When a user logs in to DELTA, the **My Applications** page is displayed. It shows the DBHDS applications that you have been granted access to. To get back to this page, click on **My Applications** on the **My Account** window.

3.3.2 Changing Locations

Some users work for multiple business partners. Therefore, a user may be assigned to multiple locations, but the data you can view will be limited to one location at a time. You will need to change locations within DELTA to gain access to complete tasks. Use the **Change Location** on the **My Account** menu.
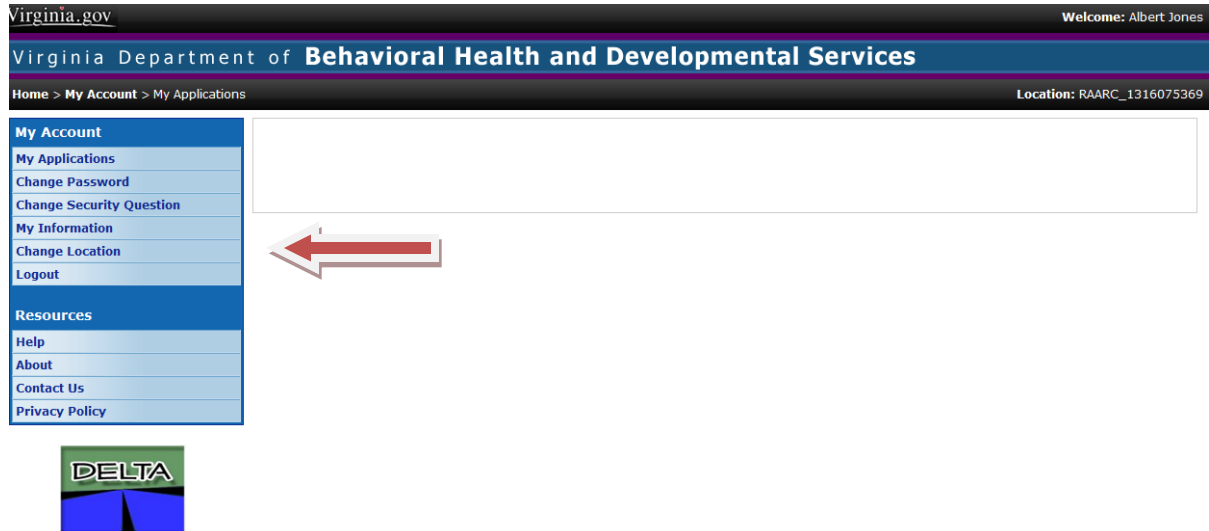
1. Select **Change Location** from the **My Account** menu.

2. Use the drop-down menu to select the location. Click **Set Location** to change your location in DELTA.