

CANS-SB OA FAQ'S

FREQUENTLY ASKED OBJECTIVE ARTS (OA) QUESTIONS

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Site Navigation (Where is this? How do I see that?):

- A. Where do I go to view the CANS assessments submitted by staff in my program?
 - 1. View All CANS by following these steps:
 - I. From the home screen, click Data Portal
 - II. On the navigation bar at the top of the screen, select Assessments
 - III. Click List

- B. Where do I go to Approve the CANS assessments submitted by staff in my program?
 - 1. Approve CANS by following these steps:
 - I. From the home screen, click Data Portal
 - II. On the navigation bar at the top of the screen, select Assessments
 - III. Click Approve
 - IV. At the bottom, select between sequential approval, and batch approval (or select an individual assessment to approve just that assessment)
 - V. Review each assessment and click approve or reject at the bottom

- C. Where do I go to View my or my staff's Workload?
 - 1. View your Workload by following these steps:
 - I. From the home screen, click Workload
 - 2. View your staff's Workload by following these steps:
 - I. From the home screen, click Admin
 - II. Utilize the filter to find the specific staff member whose workload you want to see
 - III. Double click the staff member
 - IV. On the top pane, click the Workload tab

Administrative Activities (E.g. I forgot/lost my password? How do I add my new staff member?):

- A. Who needs to have an OA user account?
 - 1. Any program staff member who has completed an assessment that will be loaded into the OA system must have a user account created for them. Even if that person is no longer with your agency/program, there must be an account in OA for the assessment to link to.
 - 2. Any program staff member who will need access to the OA system to do one or more of the following:
 - I. Enter CANS assessments

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- II. Approve CANS assessments
- III. Pull/review OA CANS data reports

B. I have forgotten/lost my password. How do I get it reset?

1. From the Cans Website (<https://sbcans.oasmr.com>), click the "Forgot your password?" link below the login button.
2. Enter your username (typically your SIMON number) in the User name field
3. Enter your email in the Email field.
4. Enter the 'CAPTCHA' - you can click the small refresh button (looks like two arrows pointing towards each other) as many times as necessary to get an image you can read.
5. Click request. You will receive a password reset link in your inbox within a few minutes.
6. Once you receive the password reset, open the email, and click the Reset Password link to open a webpage.
7. Enter your username in the User name field.
8. Enter the desired password under Password and Repeat Password
 - I. Passwords must be at least six (6) characters in length, include at least one (1) uppercase letter, at least one (1) number, and at least one special character (e.g., !).
 - II. Click submit
9. The next time you log in, you will use this changed password.

Note: If you do not receive the email with the password rest link, contact your agency's OA super user to check the email entered for you in Objective Arts. It may have been entered incorrectly.

C. How do I add a client?

- You do not have permissions to add a client. Clients are added to the OA system via a SIMON data upload. No OA users are able to create or delete a client or client information.

D. How do I find a client?

1. View a specific client by following these steps:
 - I. From the Home screen, click Data Portal. The RU's Client List is will show.
 - II. Click Show Filter
 - III. Search using the client's Simon #, first name or last name. If the client has a hyphenated last name, remove the hyphen and try searching that way. The spelling of names comes from the SIMON system, which saves whatever was input by the clerical staff that completed the initial client information in SIMON. If you find that a client's name is misspelled, you can have your clerical staff make the change in SIMON, or request that the DBH IT staff make the change.

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E. Who is authorized to approve/reject CANS assessments?

1. An OA user with the role of Supervisor, Clinical Administrator or Domain Clinical Administrator is able to approve or reject CANS assessments. Should you need to delete a CANS assessment, only a Domain Clinical Administrator can delete CANS assessments from the system.

F. How do I add a staff member (create a User Account for a staff member)?

1. Add Staff by following these steps:
 - I. From the home screen, click Admin
 - II. At the top left, beneath Administer Staff, click the Add a New Staff Member button
 - III. The Add Staff Member box will appear
 - IV. Enter the person's First Name
 - V. Enter the person's Last Name
 - VI. Enter the person's Email
 - VII. Enter the Login. The Login is the staff member's Simon #. If the staff member does not have a SIMON number, you must cancel this transaction and complete the IT Staff Master form for requesting a SIMON number. Once a SIMON number has been assigned to this staff member, return to step 1 to start this process again.
 - VIII. Locate the new Staff member by utilizing the show filter button
 1. Be sure to have Show 'Not Placed' checked under placement status
 - IX. Double click the staff member
 - X. On the top pane, enter the staff member's temporary password in the password box, then again under the again box - they will need to change their password upon first log-in.
 1. The password must be at least six (6) characters in length, contain at least one (1) capital letter and at least one (1) number.
 - XI. Check the "Active" box to activate the staff member.
 - XII. Next, under the Assigned Role tab, located below the basic information box, double click the role you wish to assign the person (you may also single click the role and then click Add Selected to assign the role). The role will appear to the right.
 - XIII. Click on the Placement tab located to the right of the Assigned Role tab
 - XIV. If necessary, expand the list by clicking on the plus sign. You may also need to single click the white arrow that appears before the program name to view the program RU.
 - XV. Select the RU(s) the staff member will work in by either single-clicking and selecting Add Placement (located on the blue bar above the list of RUs), or by clicking and dragging the RU (click and hold the mouse on the RU and move the mouse's pointer to the right) from its current position to the box on the right.

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XVI. Click Save. You have now successfully added a new user account for your staff member.

G. I have set up a staff member in the OA database, assigned them a role and the corresponding RU, but he/she cannot view any clients. What could be the problem?

1. It sounds like the staff member's Placement and/or responsibilities have not been set.
 - I. From the home screen, click Admin
 - II. Utilize the filter to find the staff member (you may need to have both show placed/not placed checked)
 - III. Double click the staff member
 - IV. On the bottom pane, click the placement tab
 - V. Assign the staff member to the appropriate RU.
 - VI. Check that the "Active" box has been checked for the staff member
 - VII. Click Save. The staff member should now be able to view clients.

2. If the correct RU placements have been correctly set, check the staff member's Responsibilities by:
 - I. From the Administer Staff screen, select System Setup
 - II. Hover over Administration
 - III. Click Responsibilities in the box to the right
 - IV. Utilize the filter to find the staff member
 - V. Double click the staff member
 - VI. Check that all of the correct RUs show in the far right panel. If the correct RUs are not showing, assign the staff member the appropriate RU(s)
 - VII. Click Save. The staff member should now be able to view clients.

CANS Assessments (How do I find the assessment I just completed?):

- A. Can items on an approved CANS assessment be changed if we notice a mistake?
 - Yes. However, only an OA user with the role of a Clinical Administrator or Domain Clinical Administrator can edit a CANS assessment that has been approved. Please note that all edits to an approved CANS assessment requires a reason for the edit.

- B. Can I skip an item?
 - No. Every item in a required module must be completed. Please review the CANS manual for guidance on scoring items you are not sure about.

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- C. I'm entering a CANS Assessment for another User in my program. How do I change the assessor name from my name to the actual assessor's name?
- There is a process to completing a CANS for another User in your assigned program:
 1. From the home screen, click Data Portal.
 2. Utilize the filter to find the client in question, then double click on their name to navigate to the client's assessment history screen.
 3. Select New Assessment located along the bottom.
 4. Click CANS
 5. In the new assessment, change the assessment date to the date the assessment was completed.
 6. You can change the assessor by clicking the appropriate username (shown in blue above the reporting unit on the first page of the CANS assessment). Be sure you see the name change from your name to the other User's name in the form.
 7. Complete the Assessment including the Caregiver Section if it applies.
 8. Click Save.
 9. Click Submit.
 10. If there are no errors, you will automatically navigate to the client's Assessment History screen.
 11. If there are errors, an error box will appear at the top right of the screen.
 12. Click Edit to correct errors.
 13. Return to step 8.
 - If these instructions are followed step by step and if there are no further errors, you will have successfully entered a CANS Assessment for another User in your program. You can check this by searching the client's assessment history screen for the assessment you just entered.

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D. I need to enter a CANS assessment for a client who has a closed episode with my program.

How do I do this?

- To enter an assessment for a client who no longer has an active placement in your program, someone in an OA role with Administration permissions must temporarily reactivate the client's placement to the program.
 1. Temporarily make the client Active:
 - I. From the home screen, click Admin
 - II. At the top, select System Setup, then hover the mouse over Administration
 - III. Click Clients to the right
 - IV. Utilize the filter to find the client. Be sure to have show 'not placed' selected.
 - V. Double click the client's name.
 - VI. Go to the "Remove Placement" area (lower right area), there is a "Temp Open" check box; check the box next to your program name and reporting unit (known as the placement code in OA).
 - VII. Select "Save" at the bottom of the page to save these changes.
 2. You will now be able to enter assessments for the client (be sure active_only is NOT checked when pulling client up). You will have three days to do so before the client reverts back to being inactive in your RU.

Reports (Can I see what clients are in need of a first CANS?):

A. I want to know which clients are in need of a first CANS, where do I go?

- View the Clients in Need of First CANS by OU report by following these steps:
 1. From the home screen, click Reports.
 2. Click New
 3. On the report menu, double click Clients with No Assessments
 4. Enter in the parameters on the right hand pane that comes up
 - I. Instrument will be CANS
 - II. Client Status will be Active_Only
 - III. Reporting Unit will be your reporting unit
 - IV. Click save.
 - V. Click the report you just created, and then click Run
 - VI. Click immediate. The report will generate in a second browser window.
 - VII. Once the report comes up, click the blue number beneath Not-Assessed Clients. This will pull up a sub-report with a list of clients that have not yet had their first assessment.