CANS-SB OA FAQ'S

FREQUENTLY ASKED OBJECTIVE ARTS (OA) QUESTIONS

For printable version click here

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?
   - View All CANS by following these steps:
     1. Under Navigation click the CANS Assessment blue bar
     2. Click View All CANS

B. Where do I go to Approve the CANS assessments submitted by staff in my program?
   - Approve CANS by following these steps:
     1. Under Navigation click the CANS Assessment blue bar
     2. Click Approve CANS

C. Where do I go to View my or my staff's Workload?
   - View Workload by following these steps:
     1. Under Navigation click the CANS Assessment blue bar
     2. Click View Workload
     3. On the Workload list blue bar, to the far right, notice your name is in a rectangular box.
     4. Click the drop down arrow on the rectangular box, and scroll though the names until you see the name you are looking for.
     5. Select the name you want and the list of clients that appears is the workload for that user.

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

A. Who needs to have an OA user account?
   - 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.
   - Any program staff member who will need access to the OA system to do one or more of the following:
     1. Enter CANS assessments
     2. Approve CANS assessments
     3. Pull/review OA CANS data reports

B. I have forgotten/lost my password. How do I get it reset?
   - Contact your program's OA Office Assistant, Supervisor or Administrator to reset your password. After your password has been reset, upon first logging into the site, please change your password to something you will remember. Please keep this password in a secure place where you can retrieve it if you forget it.
   - To change your password:
     1. Log into OA using the temporary password given to you
     2. Locate the top, dark blue bar that shows you as logged in to the site
     3. Follow the bar to the far right and locate the "wheel" next to the "logout" button.
     4. Click the "wheel" and the Change Password box will open
     5. Follow the directions
     6. Passwords must be at least six (6) characters in length, include at least one (1) uppercase letter, and at least one (1) number.
     7. Click save
   - The next time you log in, you will use this changed password.

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 of client. No OA users are able to create or delete a client or client information. If you do not see the client you are looking for, please first check that an Opening Episode has been created in SIMON for the client before contacting your program's OA Office Assistant or DBH-CYCS about this issue

D. What do I do if I can't find a client?
   - There are several ways to search for a client. Under the Clients view or View Clients
     1. Click Show Filter
     2. 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.

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

- An OA user with the role of Supervisor, Clinical Administrator or Domain Clinical Administrator is able to approve or reject CANS assessments.

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

- Add Staff by following these steps:
  1. Under Navigation click Administration tab.
  2. Click Staff
  3. Under the Administer Staff area, click on the little man icon with the green plus sign
  4. The Add Staff Member box will appear
  5. Enter the person's First Name
  6. Enter the persons' Last Name
  7. Enter the person's Email
  8. 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.
  9. Enter the Password. The password must be at least six (6) characters in length, contain at least one (1) capital letter and at least one (1) number.
  10. Click Save. The saved information will be added to the staff list on the left.
  11. Find the staff name just created and saved and double click on the name.
  12. A Basic Information box will appear on the right, showing the information you just created and saved.
  13. Check the "Active" box to activate the staff member.
  14. 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.
  15. Click on the Placement tab located to the right of the Assigned Role tab
  16. 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.
  17. 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.
  18. Click Save on the bottom blue bar
  19. Return to Navigation and click Responsibilities.
  20. Locate the staff member in the list of staff and double click the name.
  21. Select the Org Unit (Rpt Unit) tab
  22. Expand the list as in step 16 above
  23. Select the RU(s) the staff member will have responsibility for by either single-clicking and selecting Add OU (RU) Responsibilities (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.
  24. Click Save

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

- It sounds like the staff member was not assigned responsibilities.
  1. Go to the Navigation pane and click “Responsibilities”.
  2. Search for the staff member using the Show Filter.
  3. Once located, double click the staff member’s name
  4. Under the Org Unit (Rpt Unit) tab, assign them to the appropriate Reporting Unit.
  5. 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. The first 5 modules must be completed. All items of everyone module must be completed. Please review the CANS manual for further guidance on how to complete items you are not sure about how to score items you are not sure about.

C. I'm entering a CANS Assessment for another User in my program. After saving the assessment, all I have is a Print button. What happened?
   - There is a process to completing a CANS for another User in your assigned program:
     1. First, under the CANS Assessment tab in the Navigation bar, click View Clients.
     2. Search for your client then double click the name to navigate to the client's assessment history screen.
     3. Click the New Assessment tab on the blue bar.
     4. Change the Assessment date to the date the Assessment was completed.
     5. Complete the Assessment including the Caregiver Section if it applies.
     6. Click Save.
     7. Click Edit on the bottom of the page, near the Save button .
     8. Now, Click the Edit button on the blue bar at the top of the page (to the left of the clients name).
     9. Change the Assessor by double clicking the appropriate User name (the person who actually completed the assessment you are entering). Be sure you see the name change from your name to the other User's name in the form.
     10. Click Submit. DO NOT SAVE.
     11. If there are any errors, an error box will appear at the top right.
     12. Click Edit to correct errors.
     13. Change Assessor back to yourself before editing errors.
     14. Click Save.
     15. Click Edit (at the bottom) and go back in to Edit (at the top) to change the Assessor once again to the appropriate User (the person who actually completed the assessment you are entering) by double clicking the User's name.
     16. Click Submit. DO NOT SAVE.
   - If these instructions are followed step by step and if there are no further errors, you should 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.

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

1. 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 follow these steps:
     1. Under the Navigation pane click Reports.
     2. Click Clients in Need of First CANS by OU
     3. A parameter window will appear. Select Client s Status
     4. Select Reporting Level(s)
     5. Click ok. The report will generate in a second browser window.