County of San Bernardino

Objective Arts Training Manual
Clinical and Clerical Staff

Behavioral Health Children and Youth Collaborative Services

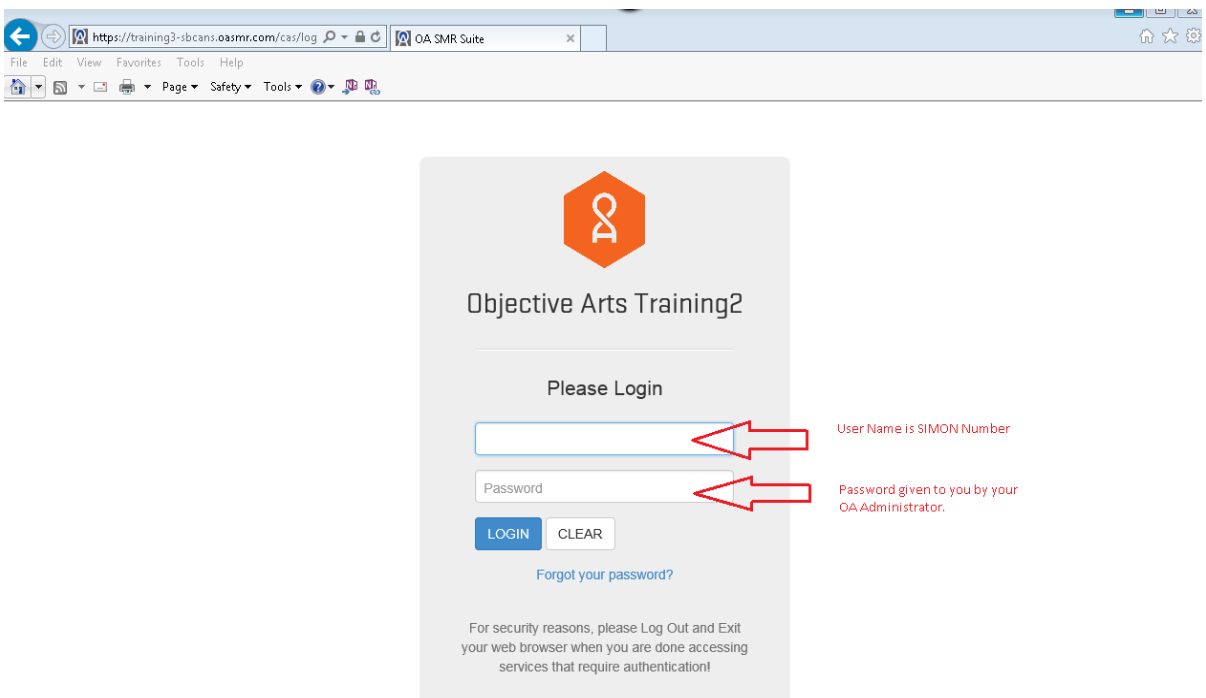
DBH CYCS
4-10-2015

Table of Contents

Logging in to Objective Arts

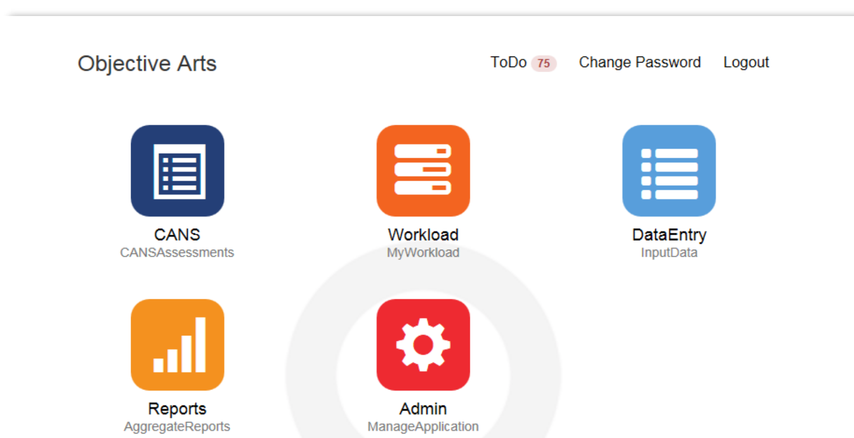
1. **Log on to Objective Arts at: https://sbcans.oasmr.com**
   - Your user name is your SIMON number.
   - You will be supplied with a password from your agency's designated OA super-user.
   - OA super users are the point persons for all OA related questions for your agency's staff. They will help staff with logging in, entry issues, etc. Super users will be your agency's designated persons to contact CYCS with Objective Arts related questions and issues that they are unable to help staff with.

2. **Enter the password exactly as it was given to you, it is case sensitive.**



After logging in, the following screen appears. The options on this screen will depend on your role in Objective Arts.

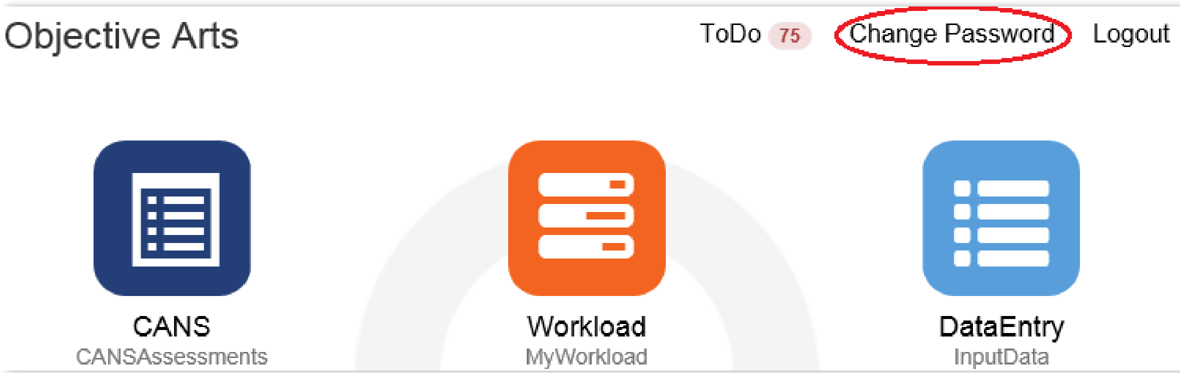
This is referred to as the **Dashboard of Menu Options (Home Screen)**



Changing your Password

The first time you login, you will be required to change your password, but will not be prompted to do so. To change your password, you will need to be at the **Dashboard of Menu Options**.

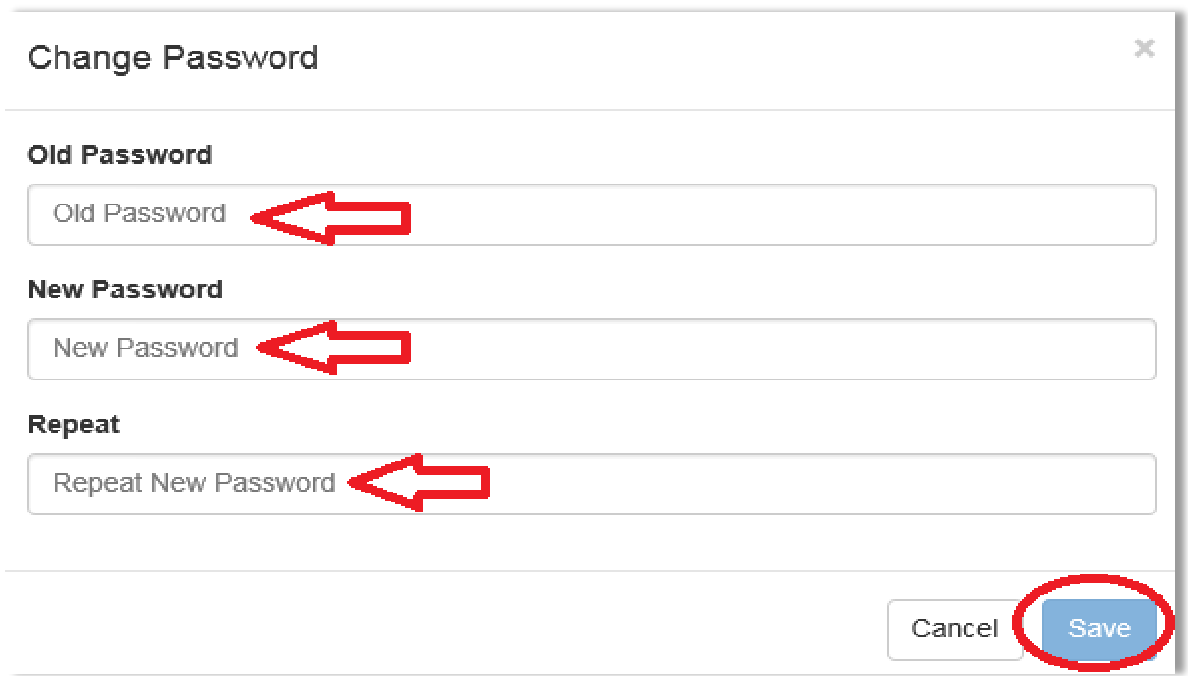
1. **Click on the Change Password link at the top right of the page.**



2. **Enter your Old password supplied by your OA Super User.**

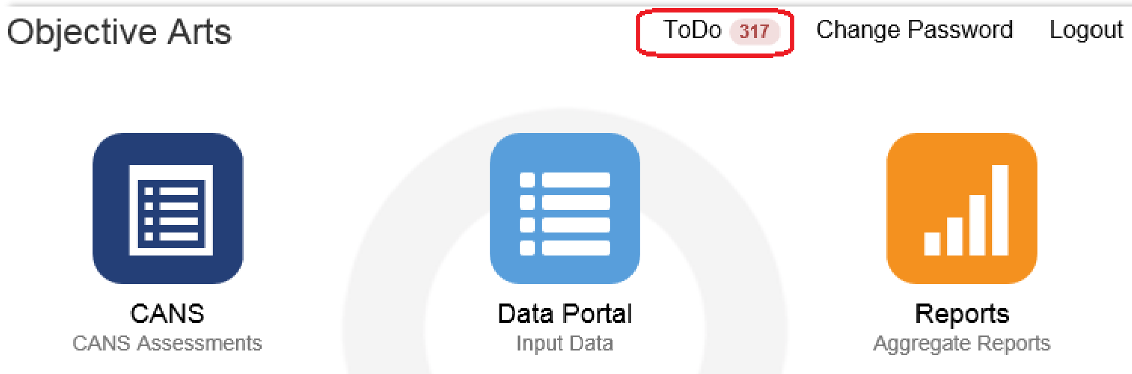
3. **Then enter your new password**
   - It must be at least six characters and one capital letter.
   - Repeat to confirm.

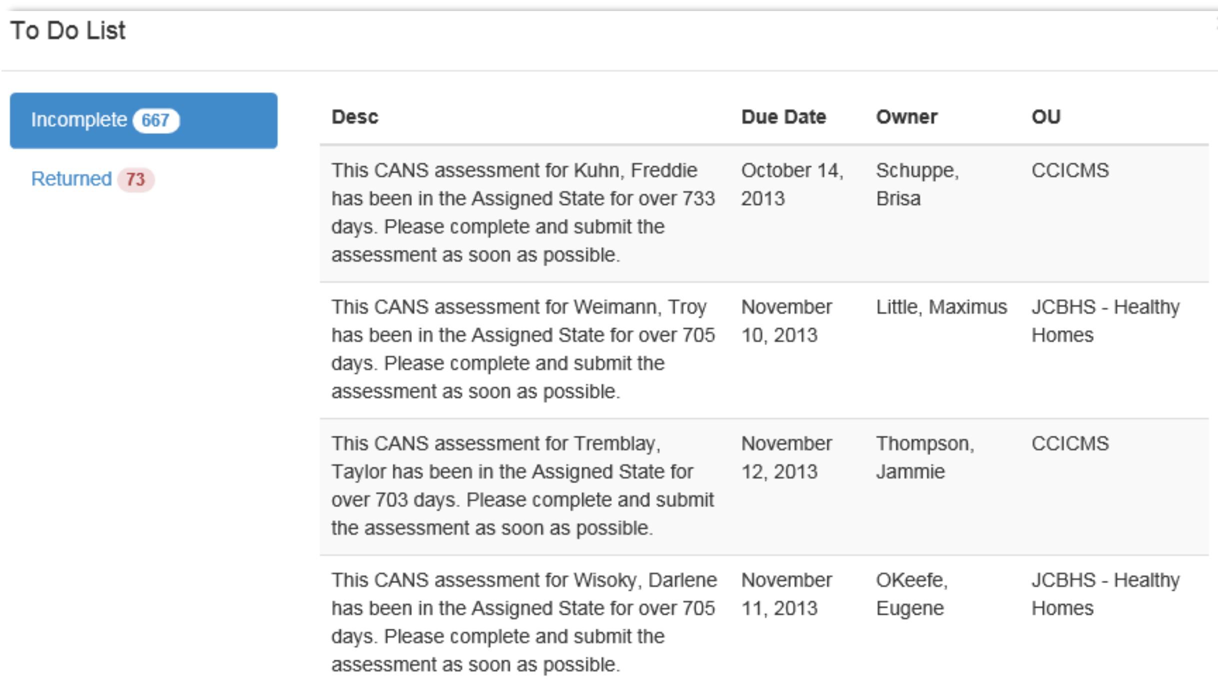
4. **Click Save.**



To Do List

1. **From the Dashboard of Menu Options, click ToDo.**
- This screen is a list of those clients that you have responsibilities for in an RU.




To Do List

Incomplete 667

Returned 73

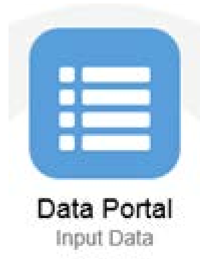
Desc	Due Date	Owner	OU
This CANS assessment for Kuhn, Freddie has been in the Assigned State for over 733 days. Please complete and submit the assessment as soon as possible.	October 14, 2013	Schuppe, Brisa	CCICMS
This CANS assessment for Weimann, Troy has been in the Assigned State for over 705 days. Please complete and submit the assessment as soon as possible.	November 10, 2013	Little, Maximus	JCBHS - Healthy Homes
This CANS assessment for Tremblay, Taylor has been in the Assigned State for over 703 days. Please complete and submit the assessment as soon as possible.	November 12, 2013	Thompson, Jammie	CCICMS
This CANS assessment for Wisoky, Darlene has been in the Assigned State for over 705 days. Please complete and submit the assessment as soon as possible.	November 11, 2013	OKeefe, Eugene	JCBHS - Healthy Homes

2. **Click on a client description and the assessment will open.**
- You will then be able to edit, submit or approve the assessment.

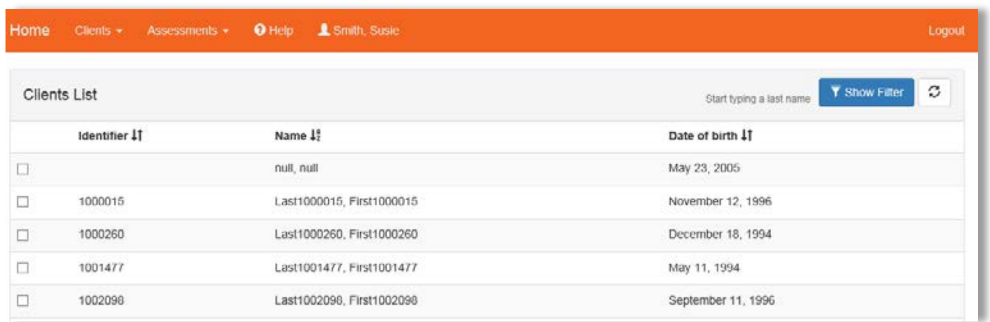
Data Portal

Client List

1. **From the Dashboard of Menu Options, click Data Portal.**

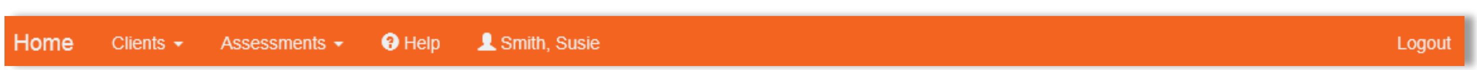


After clicking on Data Portal, you will see the following:



Depending on your browser settings, you may see a popup bar at the bottom of the screen that states, "Only secure content is displayed". If you do, click "Show all content".

The Data Portal Toolbar



- ✓ **Home:** allows you to return to the Dashboard of Menu Options.
- ✓ **Clients:** this drop-down menu offers a choice between viewing a client list and viewing client workload.
- ✓ **Assessments:** this drop-down menu is the way to navigate to a list of client assessments or to view assessments in need of approval.
- ✓ **Help:** the help button will take you to the Objective Arts Wiki.
- ✓ **Logout:** after having entered the desired data, end the session by pressing this button on the top right of the screen. In addition, close your browser after your OA session.

Clients List and Organization

This screen is a list of those clients that you have responsibilities for in an RU. The list may be sorted by three categories: their unique Identifier (Simon number or Medical Record Number), their name (last, first), and their date of birth.

Clients List — Start typing a last name — Show Filter

	Identifier	Name	Date of birth
☐		null, null	May 23, 2005
☐		null, null	December 4, 1996
☐	1000015	Last1000015, First1000015	November 12, 1996
☐	1000260	Last1000260, First1000260	December 18, 1994

1. **To sort the information, click on the category (or arrow next to it) to arrange the set by:**
   - By default, the list is sorted by Identifier from lowest to highest (increasing sequential order)
   - Identifier (from lowest to highest OR highest to lowest).
   - Name (alphabetically A-Z or Z-A).
   - Date of birth (oldest to youngest OR youngest to oldest).

2. **To view information for a client, click on the row (the bars are colored faint green or white) where the client's information appears.**
   - This gives you information about the client's assessments, their ID numbers, dates, and status.

The Assessments List will appear:

Assessments List for Last1000015, First1000015 — Start typing a last name — Show Filter

	ID	Instrument	Client Name	Date	Status
☐	86693	CANS **Assessor**: HARRIS, JENNIFER **Reporting Unit**: CCICMS (36811)	Last1000015, First1000015	November 14, 2014	Approved by WOLKENHAUER, DIANNE on 01/02/2015
☐	81930	CANS **Assessor**: Johnson, Gregory **Reporting Unit**: EVC - ChRIS (36B71)	Last1000015, First1000015	October 30, 2014	Approved by Wilkinson, Lysane on 11/10/2014
☐	74318	CANS **Assessor**: Johnson, Gregory **Reporting Unit**: EVC - ChRIS (36B71)	Last1000015, First1000015	September 3, 2014	Approved by Wilkinson, Lysane on 10/03/2014
☐	77412	CANS **Assessor**: HARRIS, JENNIFER **Reporting Unit**: CCICMS (36811)	Last1000015, First1000015	July 22, 2014	Approved by WOLKENHAUER, DIANNE on 10/09/2014

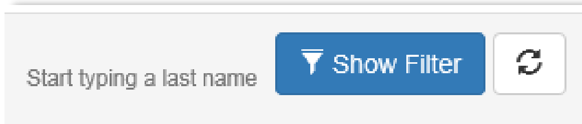
You can sort this list by clicking on the arrows next to each column header. By default, this list is sorted by Date from most recent to oldest (e.g.: newest at the top). Also, you can filter this list if you know specific information about the client.

Clients

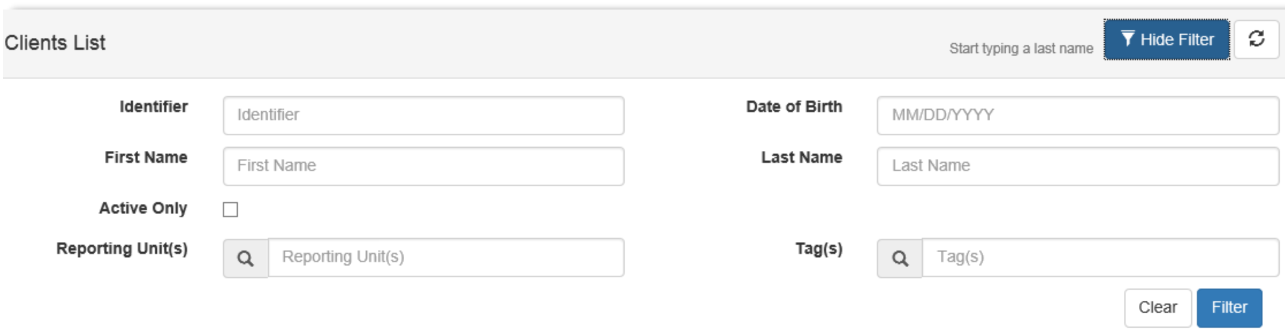
Filtering the Client List

1. **Open your Client List.**

2. **Click the blue Show Filter button to the top right of the screen.**



A filter section will open:



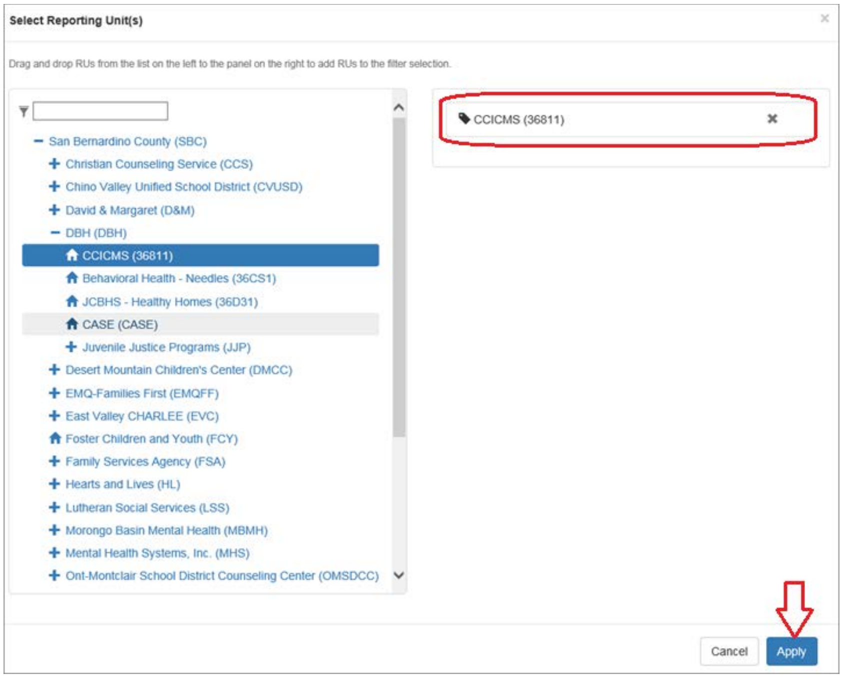
NOTE: It is NOT necessary to enter information in all of the search boxes. You may enter as much or as little information as you wish to narrow the fields.

- ✓ **Identifier:** this function is most useful if you know the Identifier of the client. (e.g. "0123456"). Partial Information may be used.
- ✓ **Date of Birth:** to locate client with a specific date of birth (e.g. "3/14/15)
- ✓ **First Name:** to locate clients with a given first name, (e.g. "Michael"). Partial information may be used.
- ✓ **Last Name:** to locate clients with a given last name, (e.g. "Abbott"). Partial information may be used.
- ✓ **Active Only:** If this box is enabled, the search will only return clients who are active. Otherwise, both active and inactive clients will be shown.
- ✓ **Reporting Unit:** to locate clients within one or a select few RUs. You will need to click the magnifying glass to input your parameters.
- ✓ **Tags:** to locate clients by a specific word or phrase in the report. (Not in use at this time. May be used in the future.)

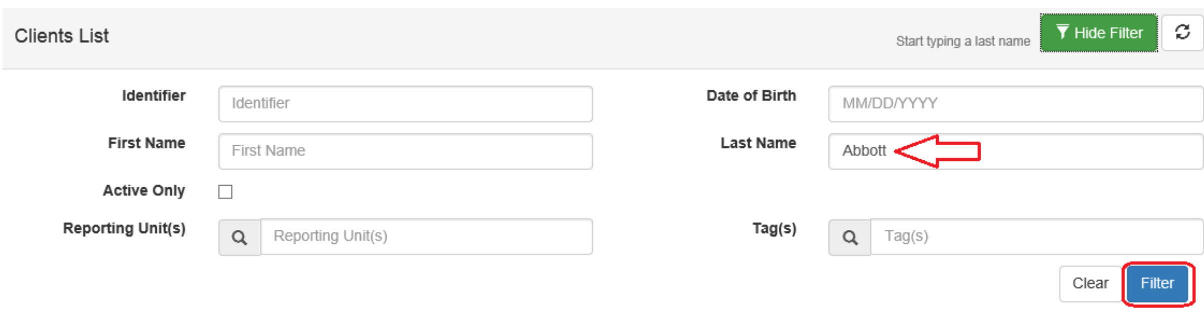
3. **To filter by RU, click on the magnifying glass to input your parameters.**
   - You can search for an RU by name in the search box next to the filter icon; or you can make your selections by clicking on the plus icons.

4. **Drag and drop RUs from the list on the left to the panel on the right.**

5. **Click the blue Apply button on the bottom right side of the screen once you have made your selections.**

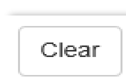


6. **Once you're done entering parameters, click Filter, or press the Enter button on your keyboard.**

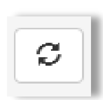


There are several key points about the filter function:

- ✓ Once you enter criteria into the filter, the blue Show Filter section will turn green and will read Hide Filter. If you want to minimize the filter, you can now press the green Hide Filter button to deflate the search terms. Note that the button will still remain green, this indicates that some filter is being applied. Thus, you can always check whether a filter is operating based on the color of the filter button.
- ✓ To delete a filter or to filter according to different terms, just re-open the filter and change the parameters. Then, click the blue Filter button on the bottom right to apply the filter to your data.
- ✓ The Clear button (next to the filter button) removes all of the filters and reverts back to the default setting of having no filters applied.



- ✓ The refresh button on the upper right hand corner of the box allows you to check to see if any new data has appeared since your last search with similar parameters.



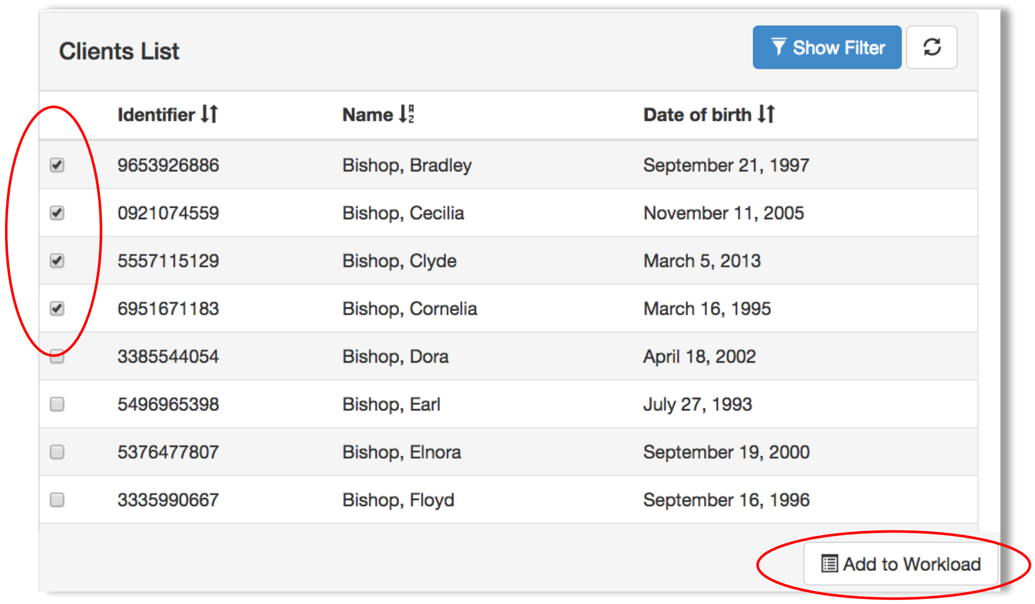
- ✓ **Additional note:** for the identifier, first name, and last name search boxes, your entries do not need to be complete words or ID numbers. You can run a search with, just the first three numbers in the ID ("012") or just the middle three letters of a last name ("bot") to yield all results that conform to those criteria.

Adding a Client to Workload

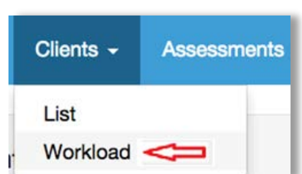
<u>Your workload is automatically populated based on the Primary Therapist field within Simon.</u> However, should you need to add a client to your workload:

1. **Navigate to the Client List.**

2. **On the Client List, check the box(es) next to the Identifier, then click the Add to Workload button at the bottom right of your screen.**



3. **You can view the workload by clicking Clients and then Workload on the top menu.**



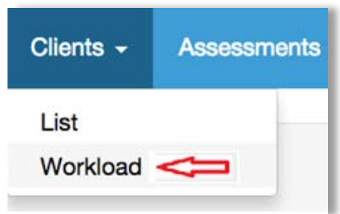
Removing a Client from Workload

<u>When the Simon case is closed, it will be automatically removed from your workload.</u> However, should you need to manually remove a client from your workload:

1. **Navigate to the Client List.**

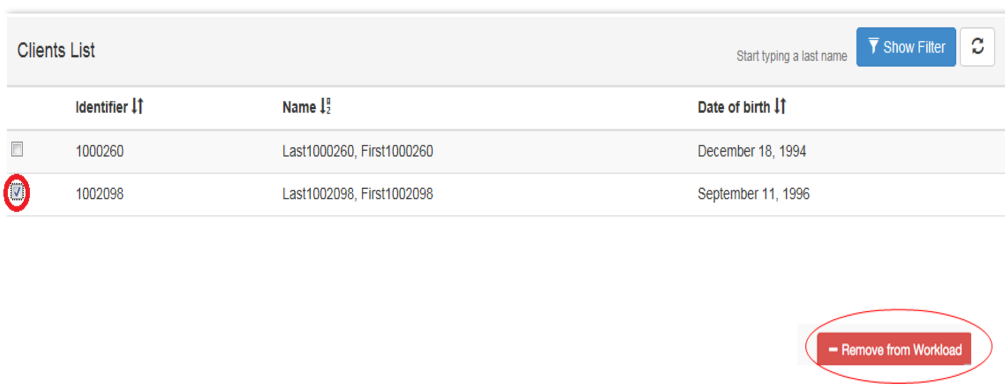
2. **On the toolbar at the top, click Clients.**

3. **Then click Workload.**



4. **Check the boxes next to the identifier of the client you are removing.**

5. **Click the red Remove from Workload button at the bottom right of your screen.**



Assessments

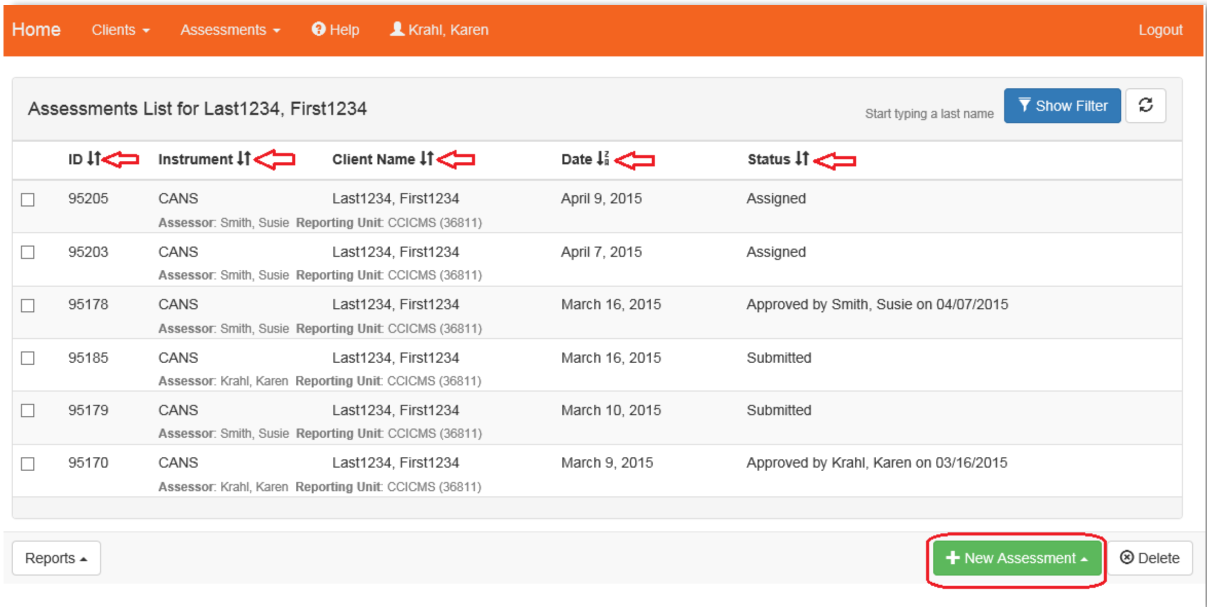
Adding an Assessment

1. **From the Dashboard, click Data Portal.**

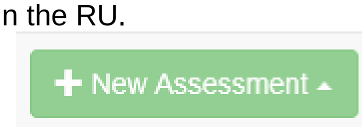
2. **Filter for the client for whom you would like to create a new assessment.**

3. **Click on the client name, or filter for a client, to pull up their list of assessments.**
   - You will see a screen like the one shown below, featuring that client's list of assessments, sorted by ID number, the instrument, name, date, and status.

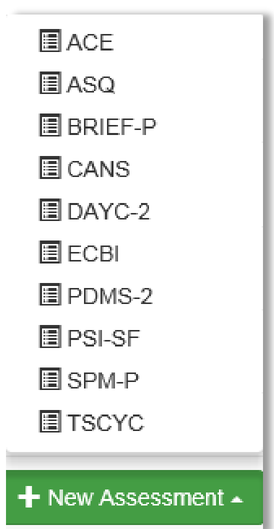
- You can organize the list and sort by clicking on the category name or the set of up and down arrows next to each of the categories.



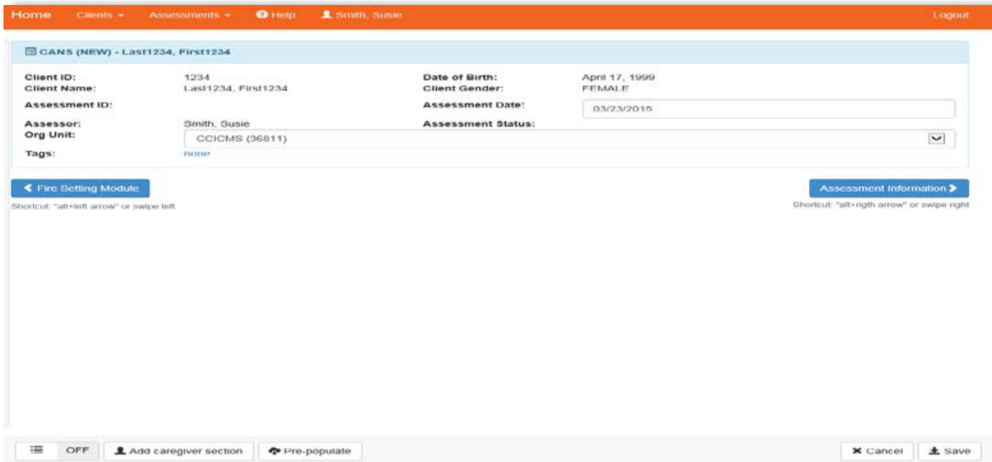
4. **Once on the assessments list, click the green New Assessment tab on the bottom right of the screen.**
   - This button will be grayed out if the client is inactive in your RU; or the staff member does not have a placement or responsibility in the RU.



5. **You will be given several different assessment options; these options are specifically designed based on criteria such as the client's age or demographic information.**
   - All available assessment types will display, choose the assessment that best fits your needs.
   - Most users will select CANS.



Once you choose the assessment type, you will continue to the main New Assessment screen. Key information about the client will display. This includes the client's ID number, name, date of birth, and gender.

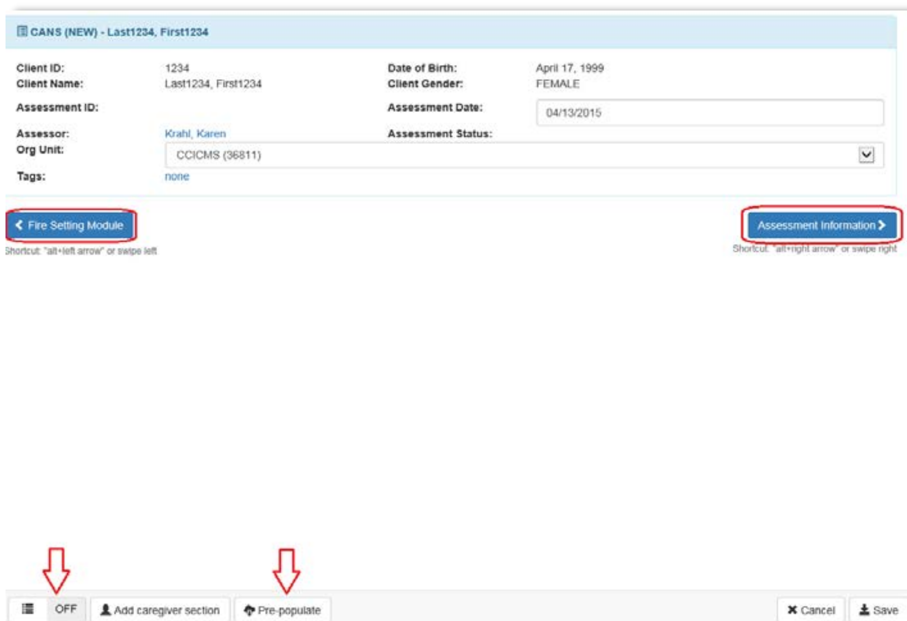


Assessment Data Entry

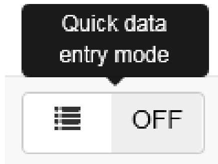
<u>All fields marked with an asterisk are mandatory and must be completed.</u>

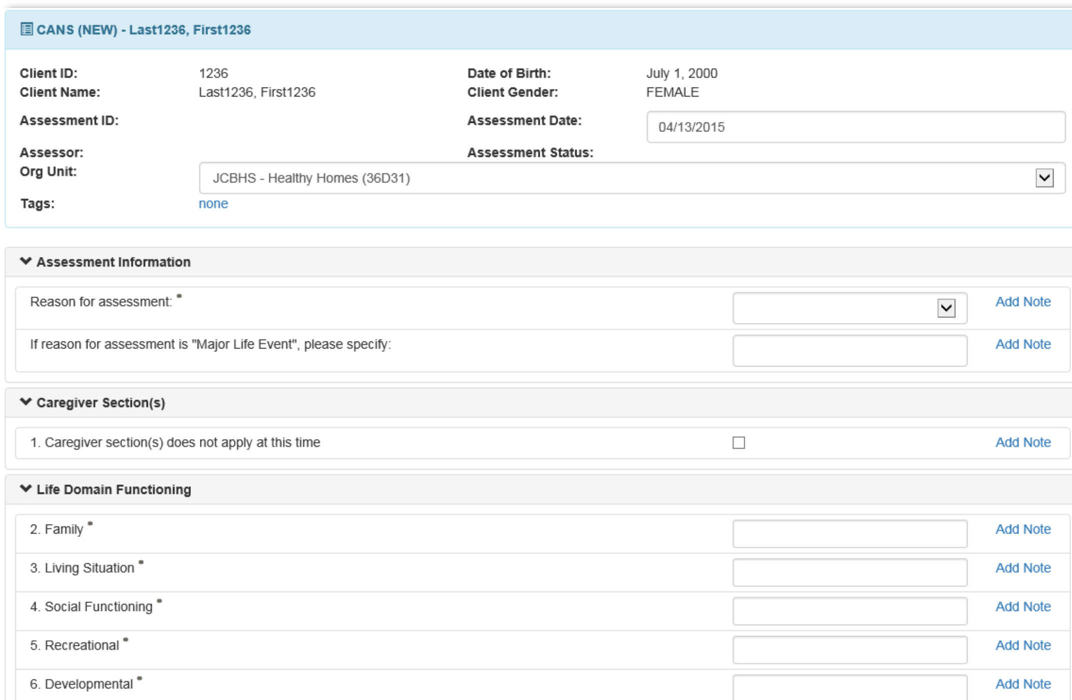
1. **To navigate through the assessment, click on the blue routing buttons with white arrows in the direction you wish to go.**
   - Instead of clicking on the button, you can navigate left or right by simultaneously holding down the alt and right/left arrow key on the keyboard.

2. **You can use the Pre-populate feature by clicking the Pre-populate button on the bottom toolbar of your screen.**
   - This will populate the new assessment with the information from the last approved assessment.



3. **You have the option to toggle Quick data entry mode in the bottom left of the screen:**



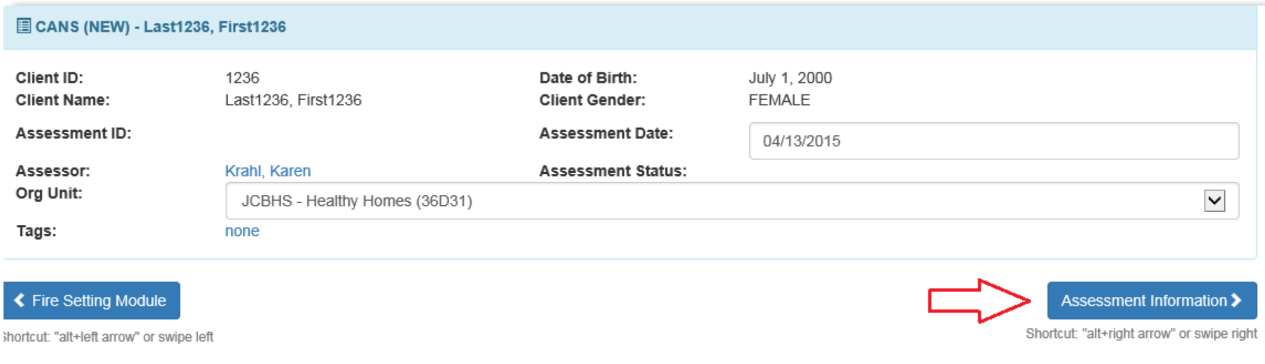


- If you choose to utilize Quick data entry mode, a screen will appear where each field can be seen on the same page.

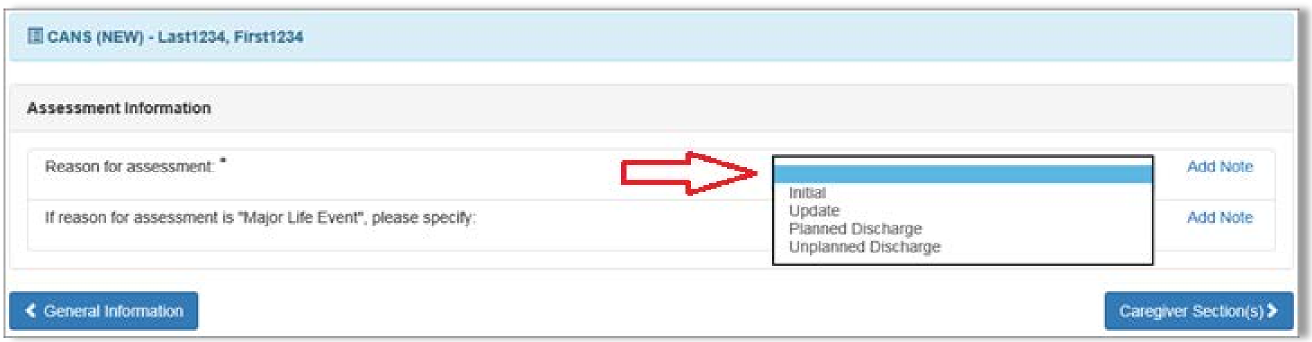
4. **It can be turned off by clicking the same button, which will now look like this:**

- The Quick data entry mode will not be covered in any further detail in this document.

5. **To add an assessment (not in Quick data entry mode), click the Assessment Information button.**

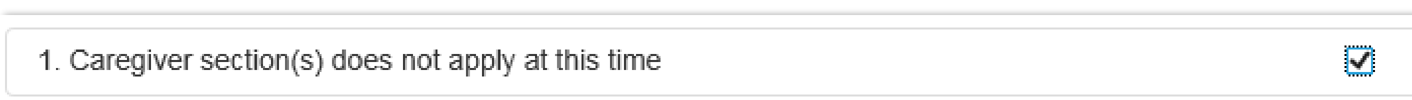


6. **Enter a Reason for assessment.**

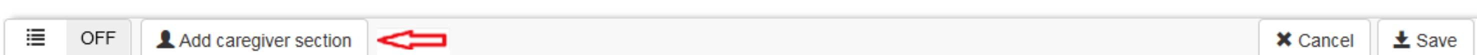


The next section will ask if the Caregiver Section(s) applies at this time.

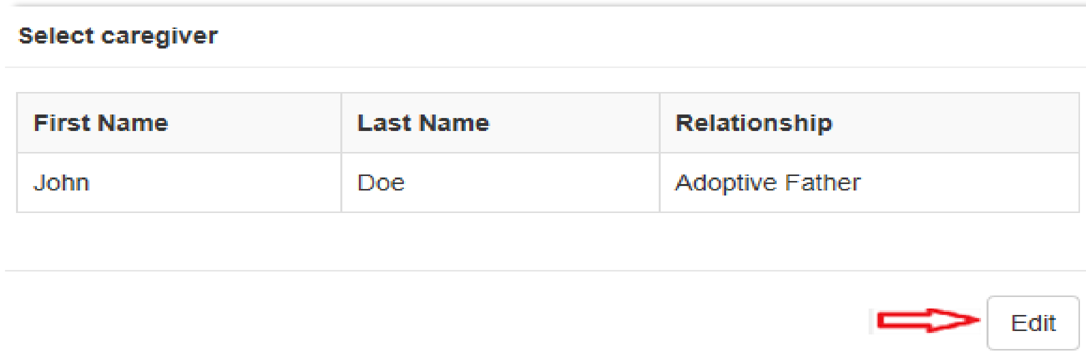
7. ***CHECK the box if you WILL NOT be adding a caregiver.***
   - If you do NOT check this box, a caregiver section WILL be required.



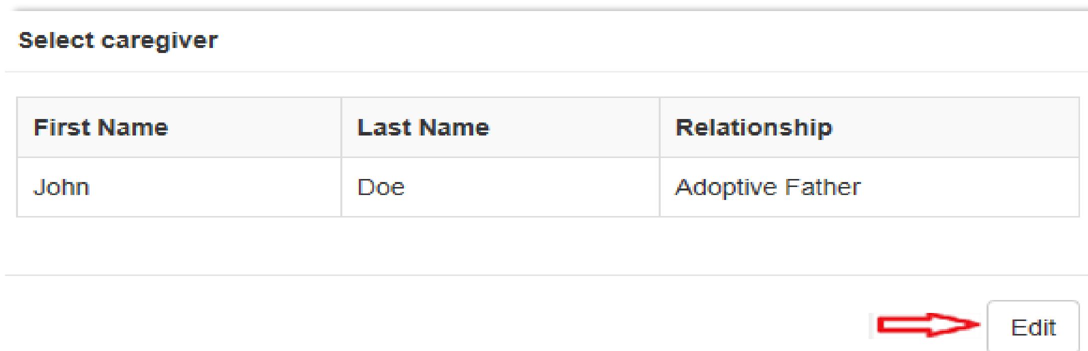
8. **You can add a caregiver at any time by clicking the "Add caregiver section" button along the bottom toolbar.**



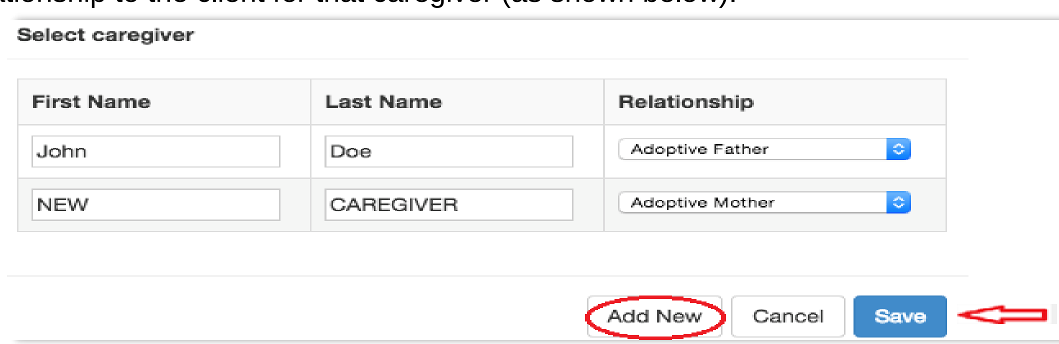
- A box displaying the current caregivers, if any, will be shown.



9. **Press the Edit button to the bottom right to add a new caregiver.**



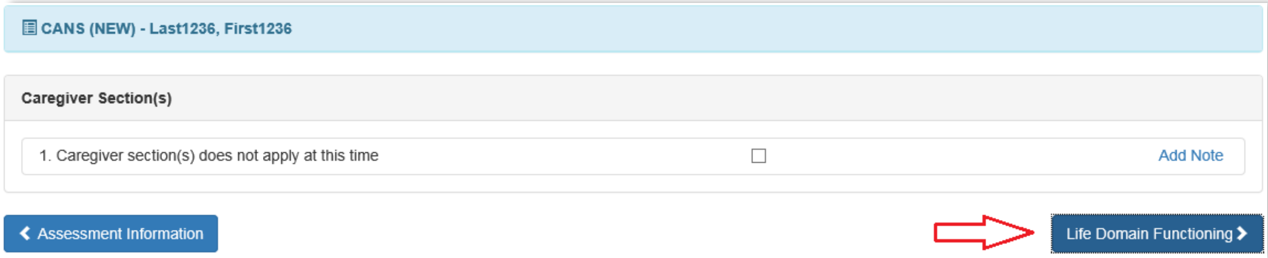
10. **You can either change the current listing(s), or you can add another caregiver by selecting the Add New option.**
    - If you select Add New, a new row will appear, allowing you to enter the First Name, Last Name, and Relationship to the client for that caregiver (as shown below).



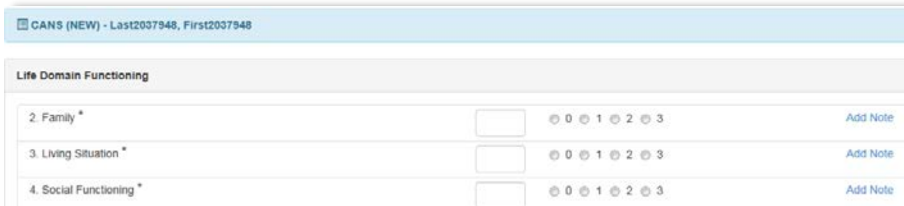
11. **To finish adding each caregiver you will need to click the Save button before you can add another caregiver.**
    - You can add as many caregivers as you like by repeating this process.

12. To exit the caregiver screen, click out of the caregiver box.

13. Click the blue button pointing to the right for Life Domain Functioning or alt + right arrow.



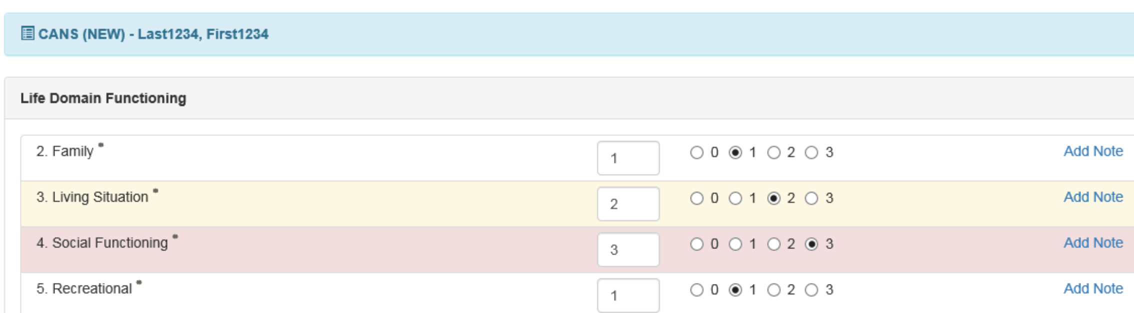
You will see:



You have two options for entering the data:

- ✓ You can enter numbers 0,1,2,3 in the empty boxes from your keyboard. Press the tab key on your keyboard to move on to the next box to be filled.
- ✓ You can select one of the bubbles from the existing options of 0,1,2,3 for each category with the click of your mouse.
- ✓ Whichever option you choose, you will notice that your responses will automatically generate color-coding dependent on score.

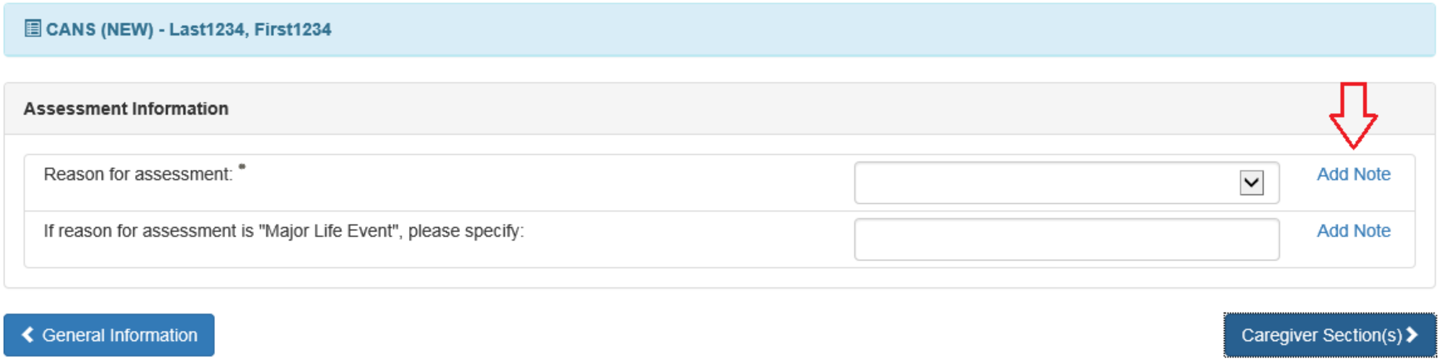
Your end result for each section will look like the sample below.



14. Continue on to other sections by pressing the blue buttons (or again, the alt+right/left arrows) directing you to additional categories until you reach the home screen.

- You have now completed the data entry.

15. **If at any time, you would like to add a note, click the Add Note button.**

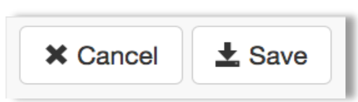


16. **A text box will open, enter your note.**

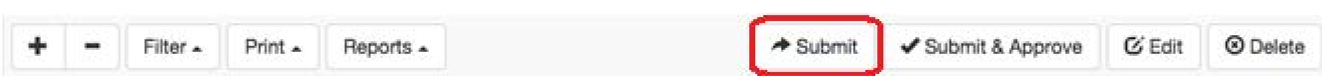
17. **Click Apply.**

18. **While entering an assessment, make sure to press the Save button periodically as you complete parts of the assessment so that you don't lose any of your data. You will have to click Edit on the lower toolbar to continue.**

    - While you do not have to do this every time you change panels, it is recommended that you do so occasionally. If you do not wish to save the changes, press Cancel, which if you have not saved, will completely exit the assessment.



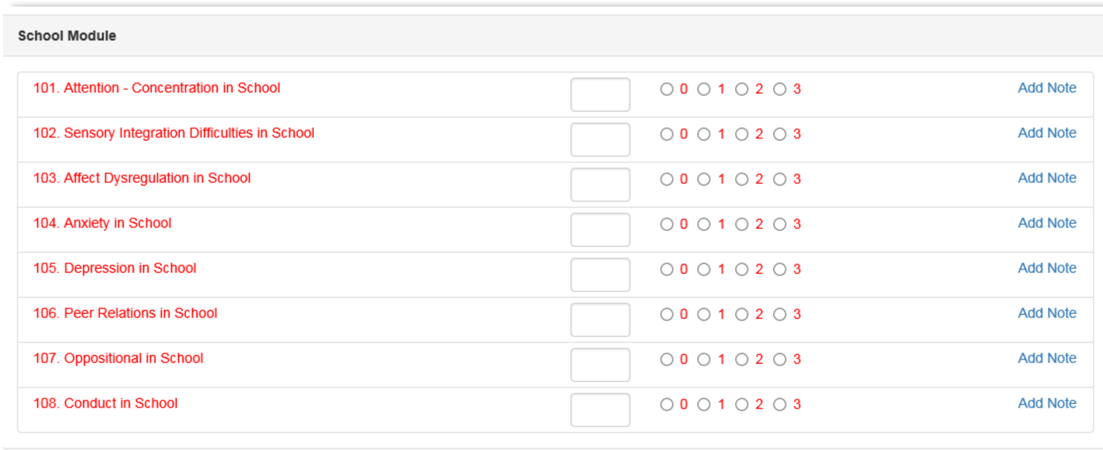
19. **Once you have saved the assessment, and are completely finished, click Submit to send the assessment to your supervisor for approval.**



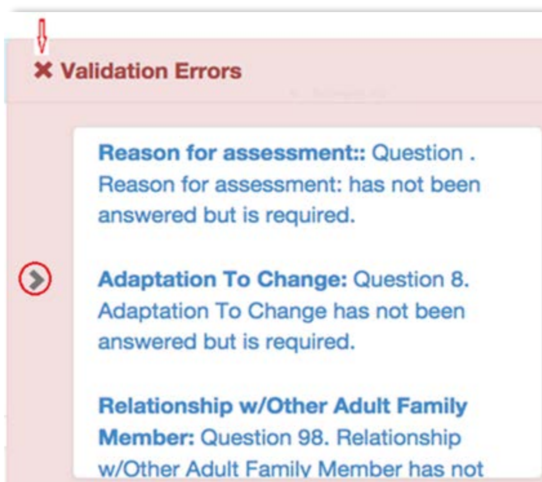
Validation Errors

1. **When you submit an assessment you may receive a validation error dialogue box.**
    - This is a fairly common occurrence, and is specifically designed to ensure that all parts of the assessment have been completed before submission.
    - The box, entitled Validation Errors, will list all of the errors on the CANS that need to be addressed.

2. **Click on each of the Validation Errors in the box to fix the issues, or navigate through the assessment and complete the question(s) that appear in red.**
   - The corrections will not eliminate the error message until you re-submit the assessment.
   - At that time, another error message may pop up if there are still issues.

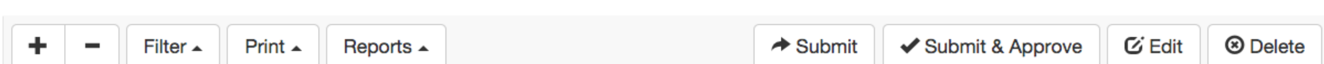


3. **You can click the red X next to the title or the arrow on the left side (pointing to the right) if you do not wish to see the errors.**



Assessment Toolbar

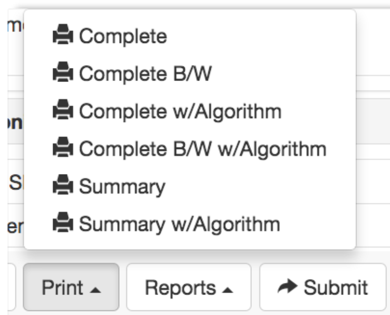
Once you open an existing assessment, or after a new assessment has been saved for the first time, you will see a toolbar along the bottom. The options (buttons) shown below vary depending on your Objective Arts role.



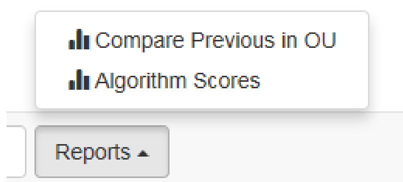
- ✓ **+/- Icons:** the plus/minus icon on the far left of the bar allows you to expand/collapse all of the categories in the assessment. Pressing the plus will show each individual component, whereas the minus will only show the major headings.

- ✓ **Filter:** allows you to filter by assessment scores. For example, you can filter to see assessment scores of "2s & 3s" or for "3s only".

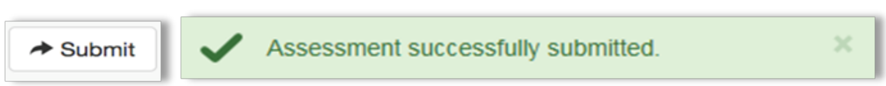
- ✓ **Print:** The print options (shown below) allow you to print the assessment in various forms. You can print a complete version that is color-coded, or a complete version in black and white. Alternatively, you can elect to print just a summary, which shortens the report to only give an overview of main categories/domain items as opposed to each individual sub-category and number value. While Algorithms Scores are not available, the print options with algorithms will not work.



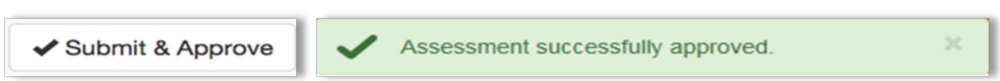
- ✓ **Reports:** You can also generate 2 different kinds of reports based on the assessment data. NOTE: each of these reports will open in either a new tab or window based on your browser settings. While Algorithms Scores are not available, the report options with algorithms will not work.



- ✓ **Submit:** The Submit option allows you to complete the assessment and then submit it for further review. If successful, you will see a confirmation that says that the assessment was successfully submitted. If not, you may receive validation errors.



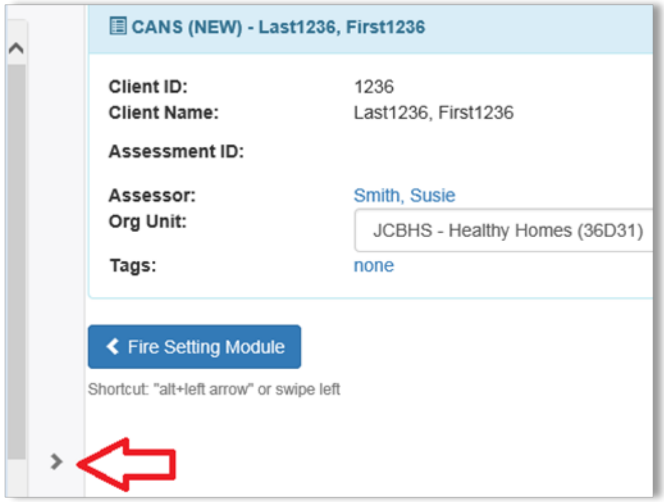
- ✓ **Submit and Approve:** The Submit and Approve option allows a supervisor to submit the assessment and then immediately approve it in one click. If successful, you will see a confirmation that says that the assessment was successfully submitted. If unsuccessful, you may receive validation errors.



- ✓ **Edit:** the Edit option allows you to change information in the assessment.

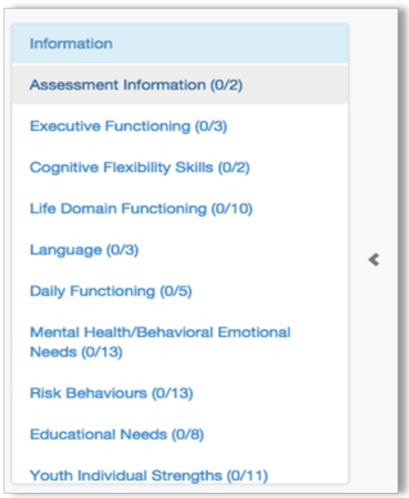
- ✓ **Delete:** the Delete option allows you to click on any assessment and delete it from the system.

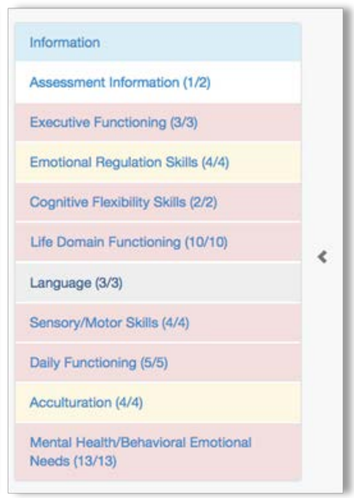
To the left side of the screen you will see a bar with an arrow.



1. **This arrow can be clicked to expand a panel.**
   - The purpose of this side panel is to give you a summary level view (which is color-coded).

This example is what the side panel might look like before you begin, with each category showing that 0 out of X questions have been answered.





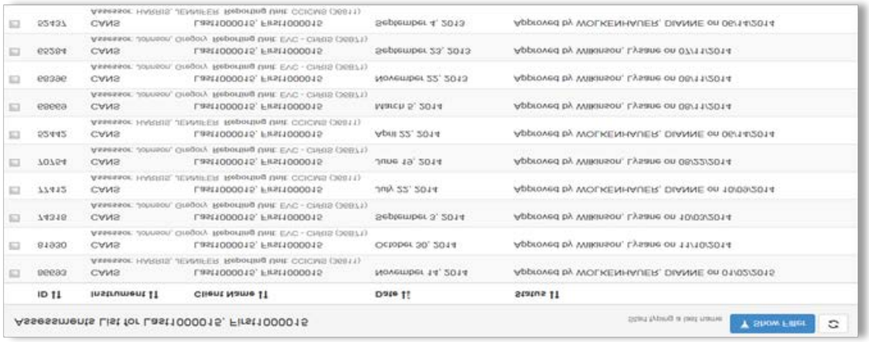
This example is more indicative of what the panel will look like once you have entered all of your data.

Accessing an Assessment

1. **From the Client List on the Menu Bar, select the client.**
   - Remember you can sort and/or filter the client results to help you find a specific client.

2. **Once you find the client you are looking for, click on the row (the bars colored faint green or white) where the client's information appears.**

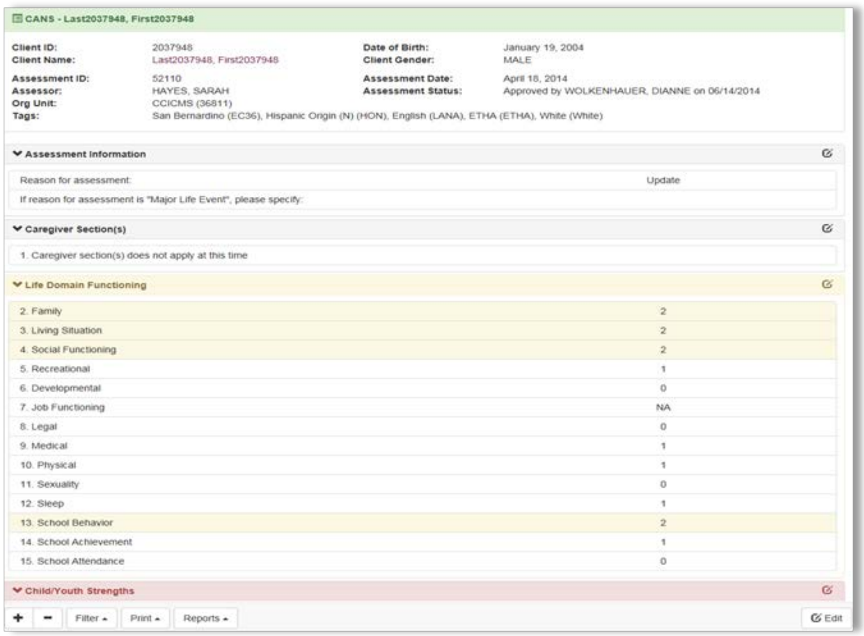
Once you select a client, you will see:



You can sort and/or filter this list to make it easier to find the specific assessment that you are looking for by clicking on the categories.

3. **Once you find the assessment you are looking for, click on the row (the bars are colored faint green or white) where the assessment information appears.**

After selecting an assessment, you will see:

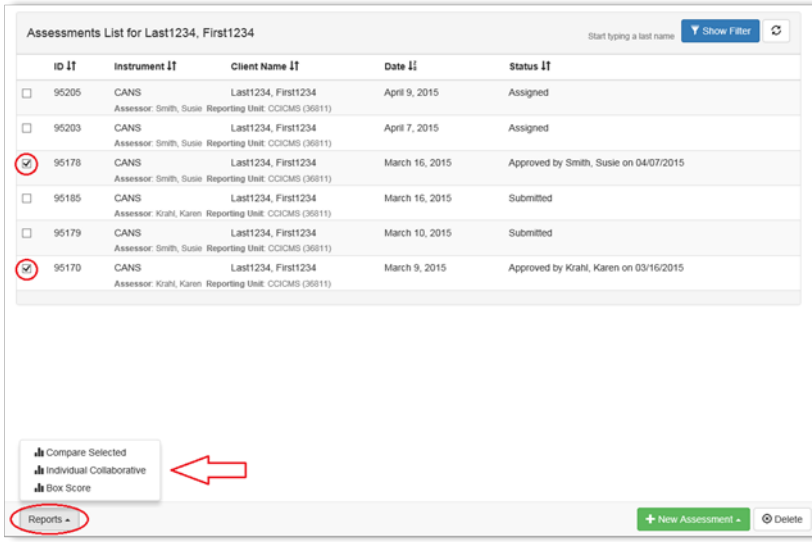


From this screen, you can review, edit, submit the assessment, or access any of the other functions on the toolbar along the bottom of your screen.

Creating Individual Assessment Reports

1. **From the Client List, open the Assessments List for the client** (as noted above)**.**

2. **Select the Assessments you would like to report on by clicking the checkbox to the left of each row.**
    - Note that multiple are selected below since a Compare Selected report is desired.



3. **Click the Reports button on the bottom left of your screen to reveal a menu of report choices.**

- ✓ **Compare Selected**: This report shows a side by side comparison of the selected assessments to show how the child has changed in each category across the time period of the reports.
- ✓ **Individual Collaborative**: This is a comparison report that presents information that can be discussed between clinicians and parents regarding a child's change in several major categories.
- ✓ **Box Score**: This report shows a composite weighted and actionable item score comparison, and specific actionable items.

4. **Click the name or graph icon for the desired report.**
    - Your report will open in a new tab or window, depending on your browser settings

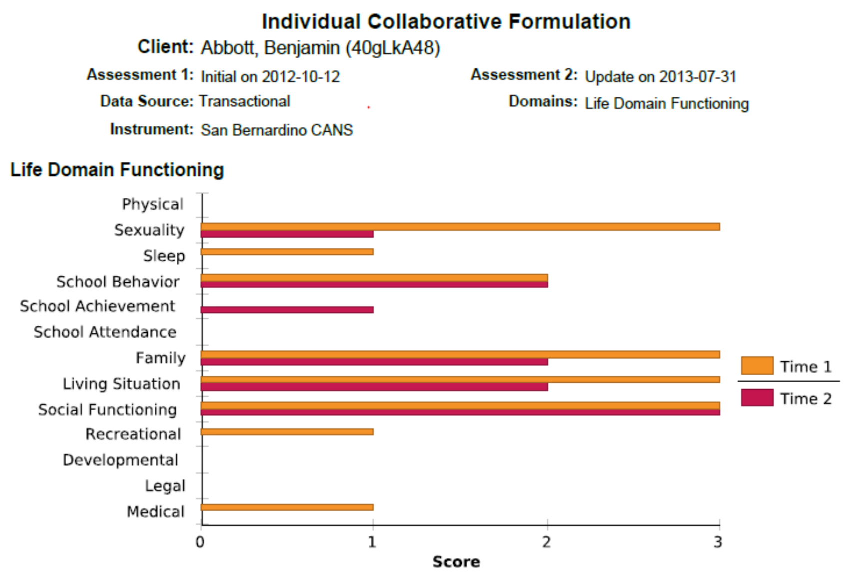
Sample Reports

This Compare Selected report compares the chosen assessments and sets up a side by side comparison.

Abbott, Benjamin
Client ID: 897
Date of Birth: 03/18/2004

#	Question	Approved Stoltenberg, Shakira 10-12-2012 1.0	Approved Little, Maximus 05-16-2013 1.0	Approved Gibson, Emanuel 07-31-2013 1.0
Assessment Information				
	Reason for assessment:	Initial	Initial	Update
	If reason for assessment is "Major Life Event", please specify:			
Caregiver Section(s)				
1	Caregiver section(s) does not apply at this time		Yes	
Life Domain Functioning				
2	Family	3	3	2
3	Living Situation	3	0	2
4	Social Functioning	3	2	3
5	Recreational	1	0	0
6	Developmental	0	2	0

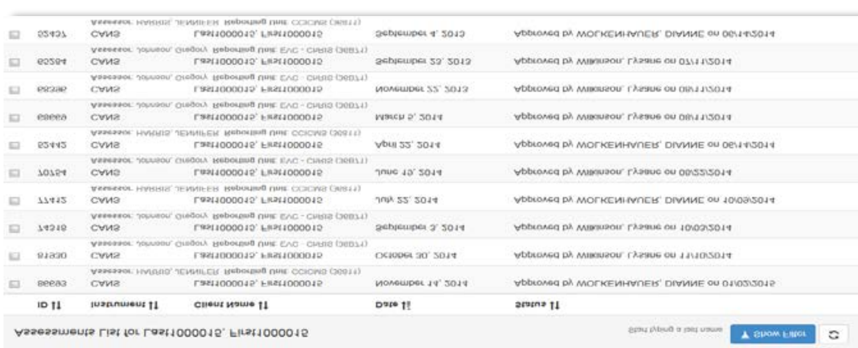
The Individual Collaborative report graphically represents changes in a child's responses to various chosen categories (in this case, Life Domain Functioning)



Accessing a Specific Assessment

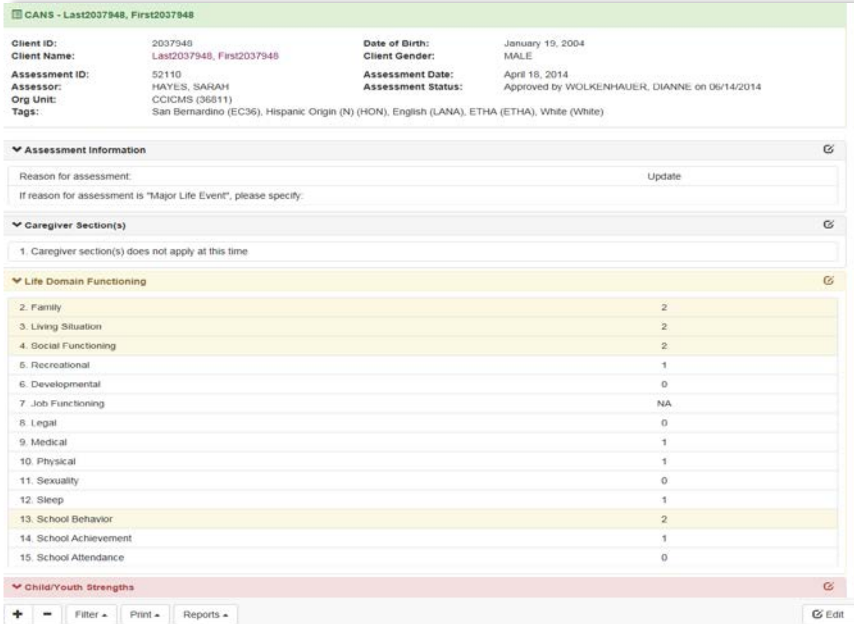
1. **From the Client List, select the client.**
   - Remember you can sort and/or filter the client results to help you find the specific client.

2. **Once you find the client you are looking for, click on the row (the bars colored faint green or white) where the client's information appears.**
   - Once you select a client, you will see:

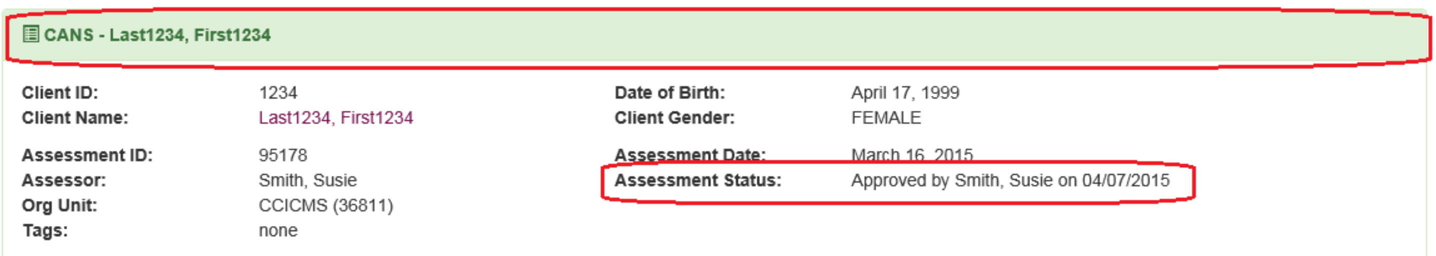


   - You can sort and/or filter this list to make it easier to find the specific assessment.

3. **Once you find the assessment, click on the row (the bars are colored faint green or white) and the assessment appears.**



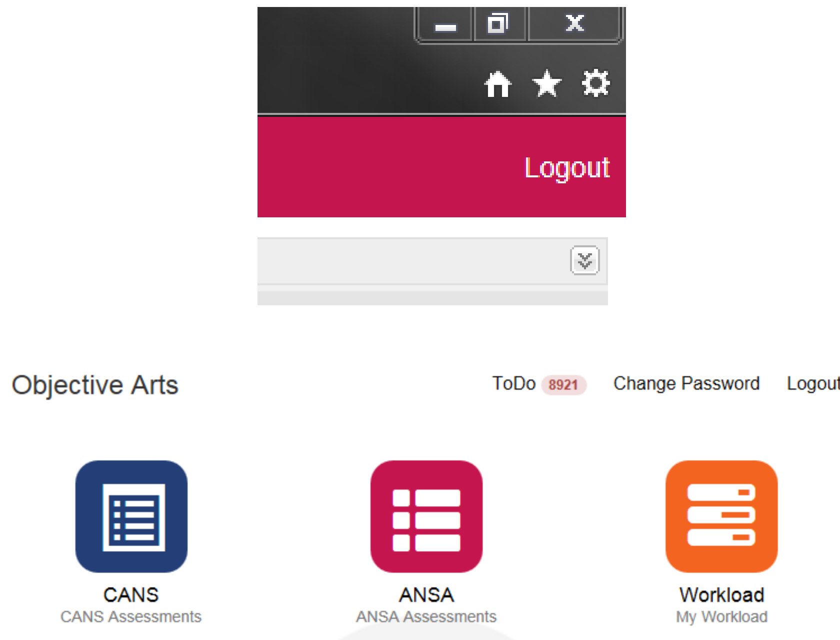
If an assessment has been approved, the header bar will be green. An assessment in an assigned or submitted status will remain blue.



You can review the assessment, make any necessary changes, submit the assessment, or access any of the other functions on the toolbar along the bottom of your screen.

Logging Out

Logout: after having entered the desired data, end the session.

To log out, click the Logout at the top right of your screen.	

Closeout: Close your browser after your OA session.

For assistance, please contact your agency's Objective Arts super user. Super users are the point persons for all OA related questions and will contact CYCS with Objective Arts questions and issues that they unable to help you with.