



County of San Bernardino

# Objective Arts (OA) Training Manual Administration

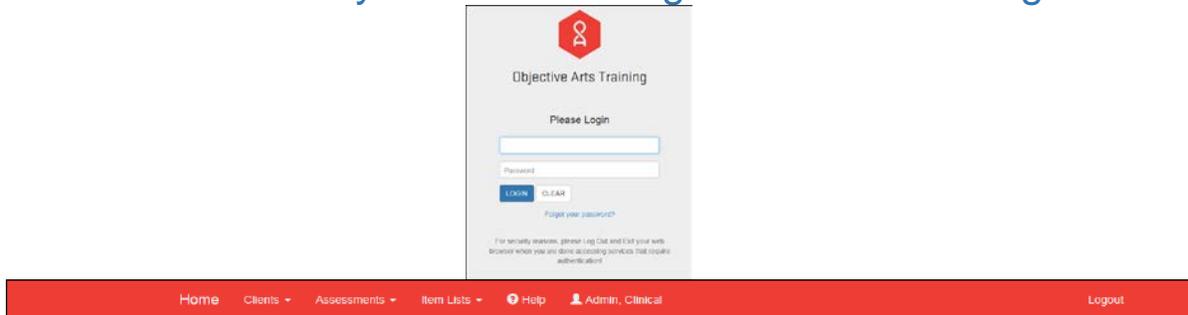
Children and Youth Collaborative Services (CYCS)

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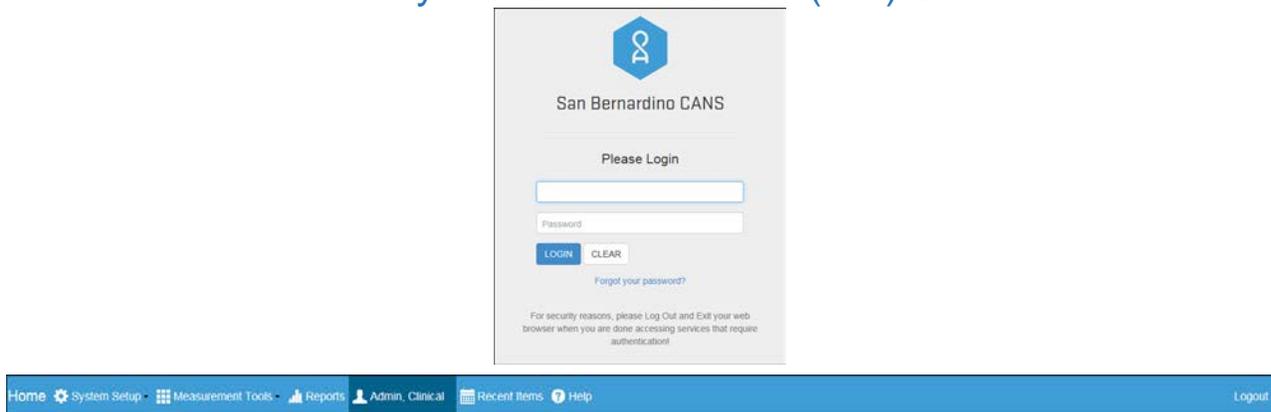
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## Important Notes

- This document is dynamic; as changes are made new versions will be posted to the website. Please check back periodically for updates.
- If you are using this manual to learn or practice using the Objective Arts (OA) database, please be sure that you are logged into the OA Training site.
  - The color to identify the OA Training Site is Dark Orange.



- The color to identify the OA Production (live) Site is Blue.



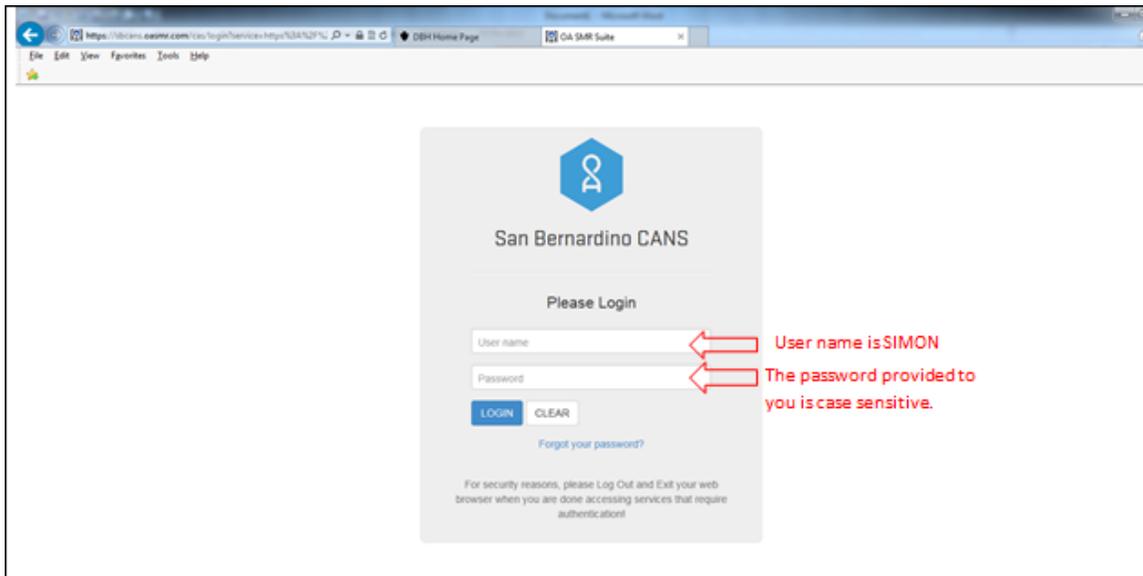
- Objective Arts website addresses:
  - Training: <https://training-sbcans.oasmr.com>.
  - Production: <https://sbcans.oasmr.com>.
- Screen shots in the document will be from the Production site as often as possible so that you can get familiar with the site's look; however, to safeguard client information, some screen shots will be from our training sites.

# Logging in to Objective Arts

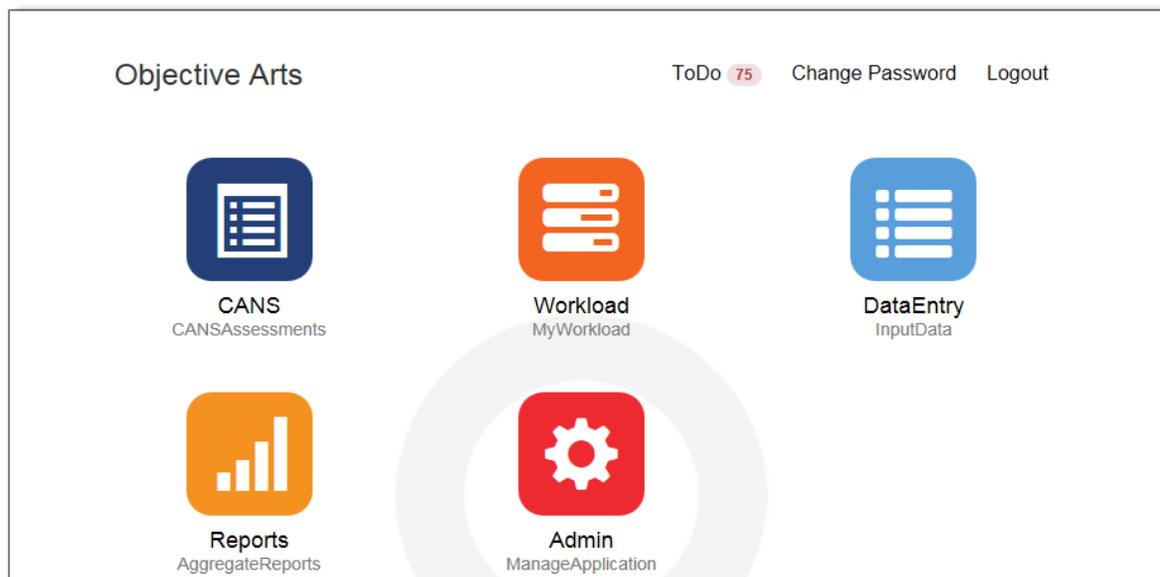
1. Log on to Objective Arts at: <https://sbcans.oasmr.com>

- Your user name is your SIMON number.
- You will be supplied with a password from your program's designated OA super-user.
  - OA super users are the point persons for all OA related questions for your program's staff. Super users will help staff with logging in, entry issues, etc. Super users only are to contact DBH with unresolved Objective Arts related questions and issues.

2. Passwords are case sensitive. Enter the password exactly as it was given to you.



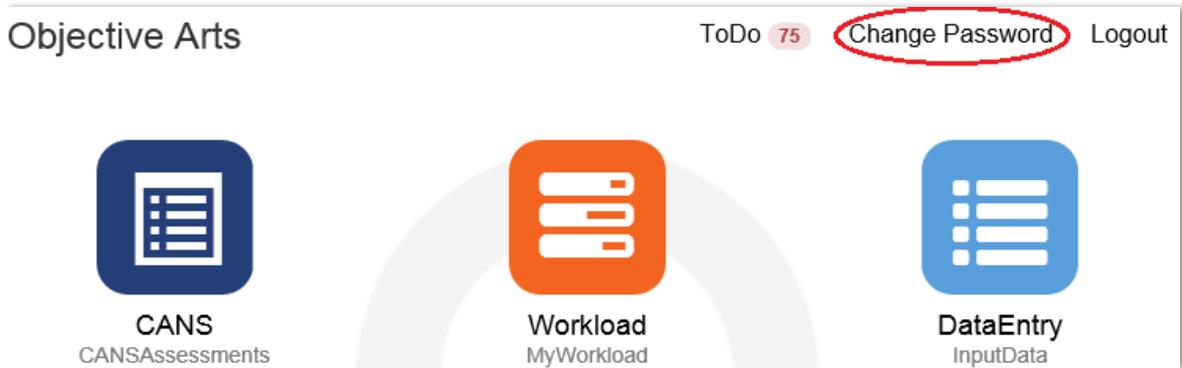
After logging in, the following screen appears. This screen is referred to as the Home Screen. The options on this screen will depend on your role in Objective Arts.



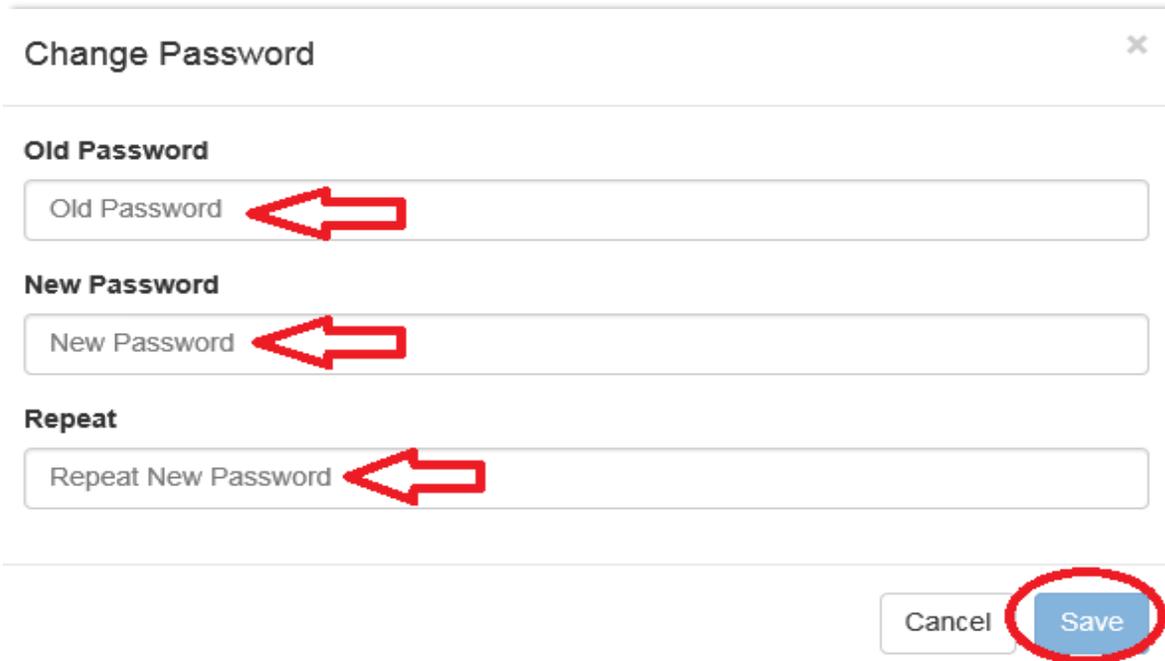
# Changing your Password

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 **Home screen**.

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



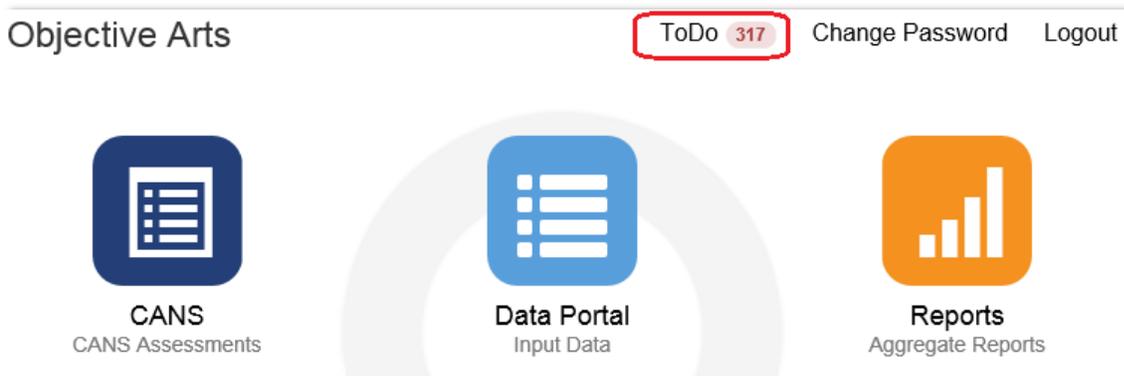
2. Enter your old password.
3. Next enter your new password
  - Passwords must be at least seven characters in length, include at least one number and one capital letter.
  - Repeat the new password.
4. Click Save.



A screenshot of the 'Change Password' form. It has a title bar with 'Change Password' and a close button. The form contains three input fields: 'Old Password', 'New Password', and 'Repeat' (with the label 'Repeat New Password'). Red arrows point to each of these input fields. At the bottom right, there are two buttons: 'Cancel' and 'Save' (circled in red).

# To Do List

1. From the Home screen, click ToDo.



- This screen functions as your OA inbox of notifications; making you aware of the clients and their assessments that need to be completed, submitted, approved (if you are a clinical supervisor), or edited for corrections.

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 (i.e., Desc) and the assessment will open.
- You will then be able to create, edit, submit or approve the assessment.

# Data Portal

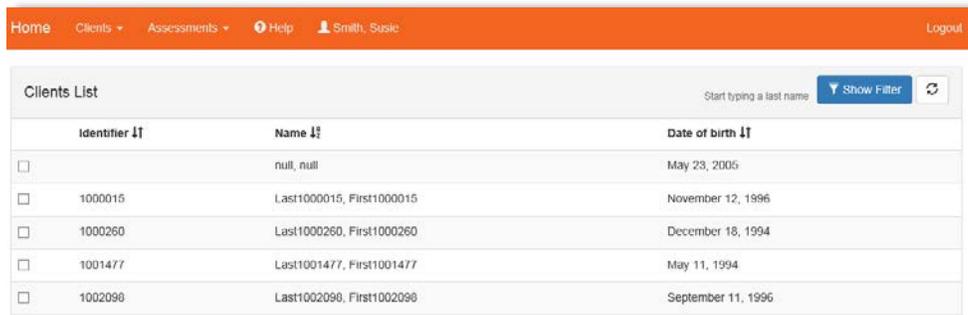
## Client List

1. From the Home screen, click Data Portal.



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

*Please Note: In the actual Production site the menu bar will be blue. While we will try to present screen shots from the Production site for familiarity of the site, in order to show only de-identified information in this training manual, sometimes the menu bars will show as orange or red, as they appear in our training site.*



The screenshot shows the "Clients List" page in a web application. The top navigation bar is orange and contains "Home", "Clients", "Assessments", "Help", "Smith, Susie", and "Logout". The main content area has a search bar with the text "Start typing a last name" and a "Show Filter" button. Below the search bar is a table with three columns: "Identifier", "Name", and "Date of birth". The table contains six rows of data, each with a checkbox in the first column.

Identifier	Name	Date of birth
<input type="checkbox"/>	null, null	May 23, 2005
<input type="checkbox"/>	Last1000015, First1000015	November 12, 1996
<input type="checkbox"/>	Last1000260, First1000260	December 18, 1994
<input type="checkbox"/>	Last1001477, First1001477	May 11, 1994
<input type="checkbox"/>	Last1002098, First1002098	September 11, 1996

Depending on your browser settings, you may see the below popup bar at the bottom of the screen that states, "Only secure content is displayed". If so, and you are working on a non-public computer, click "Show all content".



## The Data Portal Toolbar



- ✓ **Home:** allows you to return to the Home screen.
- ✓ **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 Assessments List

This screen is a list of the clients who have an active placement in the RU(s) assigned to you in OA (the list will likely include more clients than your individual workload). This list may be sorted by three categories: Identifier (Simon number or Medical Record Number), Name (last, first), and their Date of Birth.

Clients List			Start typing a last name	Show Filter	
Identifier ↑↓	Name ↓↑	Date of birth ↑↓			
<input type="checkbox"/>	null, null	May 23, 2005			
<input type="checkbox"/>	null, null	December 4, 1996			
<input type="checkbox"/>	1000015	Last1000015, First1000015			November 12, 1996
<input type="checkbox"/>	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 Name (alphabetically A-Z)
- 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 where the client's information appears.**

- You are now at the client's Assessment screen. The Assessments List shows the client's assessments, including: the assessment instrument, client name, assessor name, the program name and RU the assessment was completed under, assessment dates, and the assessment status (assigned, submitted or approved).

The Assessments List will appear as below:

Assessments List for Last1000015, First1000015					Start typing a last name	Show Filter	
ID ↑↓	Instrument ↑↓	Client Name ↑↓	Date ↓↑	Status ↑↓			
<input type="checkbox"/>	86693	CANS	Last1000015, First1000015	November 14, 2014	Approved by WOLKENHAUER, DIANNE on 01/02/2015		
		Assessor: HARRIS, JENNIFER Reporting Unit: CCICMS (36811)					
<input type="checkbox"/>	81930	CANS	Last1000015, First1000015	October 30, 2014	Approved by Wilkinson, Lysane on 11/10/2014		
		Assessor: Johnson, Gregory Reporting Unit: EVC - CHRIS (36B71)					
<input type="checkbox"/>	74318	CANS	Last1000015, First1000015	September 3, 2014	Approved by Wilkinson, Lysane on 10/03/2014		
		Assessor: Johnson, Gregory Reporting Unit: EVC - CHRIS (36B71)					
<input type="checkbox"/>	77412	CANS	Last1000015, First1000015	July 22, 2014	Approved by WOLKENHAUER, DIANNE on 10/09/2014		
		Assessor: HARRIS, JENNIFER Reporting Unit: CCICMS (36811)					

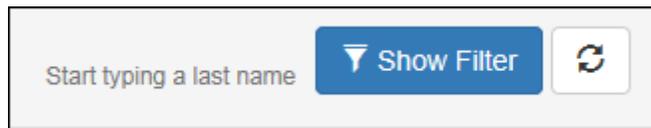
By default, this list is sorted by Date, from most recent to oldest. You can sort the assessment list by clicking on the arrows next to each column header.

In addition to sorting the Clients and Assessments Lists, you can filter the lists if you know specific information about the client. How to filter lists is covered below.

## Clients

### Filtering the Client List

1. Open your Client List.
2. To the far right of the words “Clients List”, on the top grey bar, you will see the following:



3. If you click the words “Start typing a last name”, and begin typing a last name, the list will automatically narrow to include clients with only the last name you typed.

Or you can:

4. Click the blue Show Filter button at the top right of the screen.

The filter section will open and you can narrow the client list by entering any of the information requested:

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 list.

- ✓ **Identifier:** to locate client if you know the client’s Identifier (SIMON or Medical Record Number”). 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 by first name. Partial information may be used.
- ✓ **Last Name:** to locate clients by last name. Partial information may be used.
- ✓ **Active Only:** This box is checked by default and returns clients who are active to the RU(s) you are assigned to in OA. Unchecking this box will return a list of clients who are currently inactive to your RU(s), but once had an active case in your RU(s).
- ✓ **Reporting Unit:** to locate clients by one or more reporting units (RUs) assigned to you in OA (this is only useful if you have more than one RU assigned to you).

To Filter by RU: Click the magnifying glass. Click and hold one of the RUs listed. Drag the RU over to the empty white box to the right of the RU list. When this box turns green, “drop” the RU selection into the box. You can drag more than one RU into this box. An RU can be deleted from this box by clicking the “X” to the right of the RU. Once you have the RU(s) you want to filter your client list by in this box, select Apply.

✓ **Tags:** Tags are not in use at this time.

5. Once you have entered parameters, click Filter, or press the Enter key on your keyboard and your clients list will now be narrowed by your Filter selection(s).

Additional key information about the filter function:

- ✓ You will know whether a filter is operating based on the color of the filter button. When the Clients List has been filtered, the Show Filter button will be Green (Blue = list not filtered; Green = list is filtered).
- ✓ To edit a filter, re-open the filter section and change the parameters. Click the blue Filter button on the bottom right to apply the new filter criteria to your data.
- ✓ The Clear button (to the immediate left of the Filter button) removes all of the filters and returns your list back to the default settings.



- ✓ The refresh button in the upper right corner (immediately right of the Hide Filter button) adds to your list any new data that may have uploaded to the system since your last search with similar parameters.

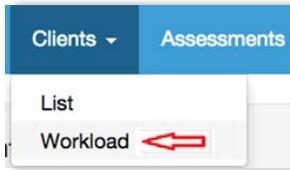


- ✓ For the identifier, first name, and last name search boxes, entries do not need to be complete ID numbers or words. For example, a search can run using only the first three numbers in a client ID (e.g., "012") to yield a list of clients with the numbers "012" somewhere in the client ID.

### *Viewing and Adding a Client to Workload*

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

- To view your workload click Clients on the top blue menu bar, and then Workload from the drop-down items.



Clients List			Start typing a last name <span>Show Filter</span> <span>Refresh</span>
	Identifier ↑↓	Name ↓↑	Date of birth ↑↓
<input type="checkbox"/>	40gLkA48	Abbott, Benjamin	March 18, 2004
<input type="checkbox"/>	vFiyUonN	Abbott, Lisandro	January 6, 2005
<input type="checkbox"/>	dc4as_0H	Abbott, Tessie	June 14, 2012

- To add a client to your workload, navigate to the Client List.
- In the Client List, check the box(es) next to the Identifier of the client(s) you wish to add to your workload. Click the Add to Workload button at the bottom right of the screen.

Clients List			Start typing a last name <span>Show Filter</span> <span>Refresh</span>
	Identifier ↑↓	Name ↓↑	Date of birth ↑↓
<input checked="" type="checkbox"/>	40gLkA48	Abbott, Benjamin	March 18, 2004
<input checked="" type="checkbox"/>	vFiyUonN	Abbott, Lisandro	January 6, 2005
<input checked="" type="checkbox"/>	dc4as_0H	Abbott, Tessie	June 14, 2012
<input type="checkbox"/>	G8Sf40bf	Abernathy, Keaton	October 16, 2012
<input type="checkbox"/>	xBroZYG6	Abernathy, Malcolm	January 15, 2001
<input type="checkbox"/>	sqjBITqS	Abernathy, Priscilla	April 7, 2000
<input type="checkbox"/>	lrCqkPZA	Abshire, Gertrude	June 21, 2003
<input type="checkbox"/>	ag2z1ohW	Abshire, Lenna	July 4, 1996
<input type="checkbox"/>	P2jJPEGg	Abshire, Marian	April 11, 2006
<input type="checkbox"/>	NCVdO8T3	Abshire, Maryjane	March 15, 2006
<input type="checkbox"/>	6cR5wZBr	Adams, Katharina	October 1, 2002
<input type="checkbox"/>	k1ysBZLQ	Adams, Maya	October 21, 2003
<input type="checkbox"/>	W3Mxwydi	Allenwerth, Elissa	October 18, 2012
<input type="checkbox"/>	n_ElhmaT	Allenwerth, Jules	September 14, 1999
<input type="checkbox"/>	k13XODJw	Allenwerth, Laurence	October 28, 2011
<input type="checkbox"/>	AVGg1RKe	Allenwerth, Royal	December 18, 2009
<input type="checkbox"/>	B047aBcE	Anderson, Agustin	February 9, 2010
<input type="checkbox"/>	eTYXO92s	Ankunding, Christy	October 8, 1999
<input type="checkbox"/>	1lc3z9oo	Ankunding, Ila	August 2, 2000
<input type="checkbox"/>	tShv4q3s	Ankunding, Loraine	January 28, 2008
<input type="checkbox"/>	1dDRRnDt	Ankunding, Skylar	April 17, 1999
<input type="checkbox"/>	SXykRX8T	Armstrong, Bertha	June 23, 1996
<input type="checkbox"/>	rdAve13n	Armstrong, Douglas	June 20, 2002

Removing  
When the c

Add to Workload

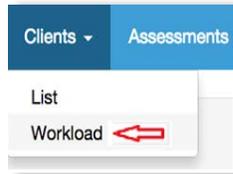
load. However,

should you need to manually remove a client from your workload:

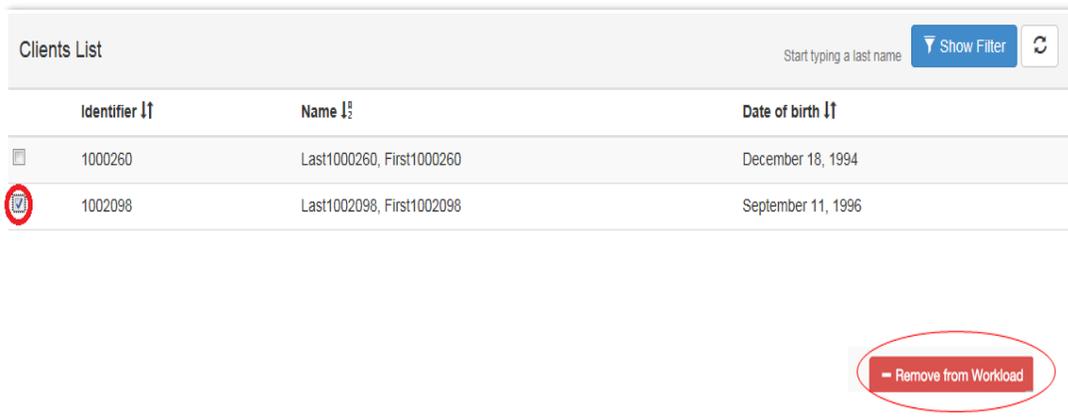
- Navigate to the Client List.

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 and then click the red Remove from Workload button at the bottom right of your screen.



## Assessments

### *Adding an Assessment*

1. From the Home screen, click Data Portal.

2. Click on the client name for which you would like to create a new assessment. Or filter for the client and then click on the client's name.

- You will navigate to the client's Assessments screen. This screen may contain assessment information for the client, if there are assessments in OA for the client (see below). If there are no assessments in OA for the client, this screen will be blank. The assessments are sorted by ID number, the instrument, name, date, and status.

Home Clients Assessments Help Krahl, Karen Logout

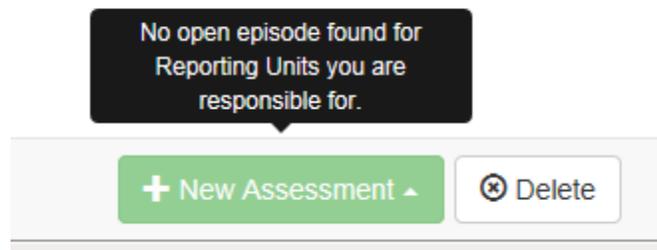
Assessments List for Last1234, First1234 Start typing a last name Show Filter Refresh

ID	Instrument	Client Name	Date	Status
<input type="checkbox"/> 95205	CANS Assessor: Smith, Susie Reporting Unit: CCICMS (36811)	Last1234, First1234	April 9, 2015	Assigned
<input type="checkbox"/> 95203	CANS Assessor: Smith, Susie Reporting Unit: CCICMS (36811)	Last1234, First1234	April 7, 2015	Assigned
<input type="checkbox"/> 95178	CANS Assessor: Smith, Susie Reporting Unit: CCICMS (36811)	Last1234, First1234	March 16, 2015	Approved by Smith, Susie on 04/07/2015
<input type="checkbox"/> 95185	CANS Assessor: Krahl, Karen Reporting Unit: CCICMS (36811)	Last1234, First1234	March 16, 2015	Submitted
<input type="checkbox"/> 95179	CANS Assessor: Smith, Susie Reporting Unit: CCICMS (36811)	Last1234, First1234	March 10, 2015	Submitted
<input type="checkbox"/> 95170	CANS Assessor: Krahl, Karen Reporting Unit: CCICMS (36811)	Last1234, First1234	March 9, 2015	Approved by Krahl, Karen on 03/16/2015

Reports + New Assessment Delete

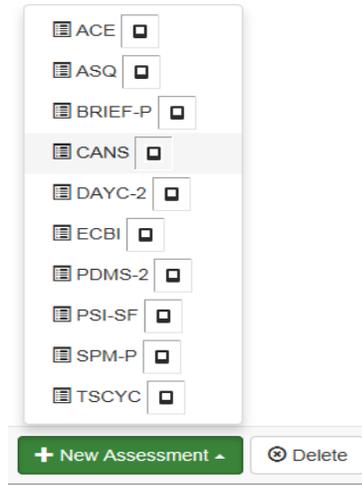
**3. Once on the assessments list, click the green New Assessment button at the bottom right of the screen.**

- The New Assessment button will not be available for use if the client is not active to the RU(s) assigned to you in OA. If you hover over the New Assessment button, you will receive the following message:



**4. Upon clicking the New Assessment button, several assessment types will be listed.**

- Assessment types will display, choose the assessment used in your program. Most users will select CANS.
- The instructions below are for completing the CANS-SB.



After selecting CANS, you will navigate to the first page of the CANS (New) entry screen. Key information about the client will display. This includes the client's ID number, name, date of birth, and gender.

A screenshot of the 'CANS (NEW) - Abbott, Benjamin' entry screen. The form contains the following fields: Client ID (40gLkA48), Client Name (Abbott, Benjamin), Date of Birth (March 18, 2004), Client Gender (MALE), Assessment ID (empty), Assessment Date (05/28/2015), Assessor (Hilpert, Maci), Rpt Unit (empty dropdown), and Tags (none). The Assessment Date field is a text input box.

Be sure that the **Client ID, Date of Birth, Client Name, and Client Gender** are correct for the client that is being assessed.

**Assessment ID:** The Assessment ID will auto-generate after the assessment is complete and has been saved.

**Assessment Date:** The assessment date is the date that the assessment was performed, not the date that it is entered. This field defaults to the current date. If the current day's date is not the date of the client's assessment, be sure to change this date to the correct date of assessment.

1. To edit, click in the **Assessment Date** field and select the correct date.

Assessment Date: 05/28/2015

Assessment Status:

May 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	01	02
03	04	05	06	07	08	09
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	01	02	03	04	05	06

Assessment Information

Shortcut: "alt+right arrow" or swipe right

**Assessor:** If the person entering the assessment information into OA is not the assessor who completed the assessment with the client, the Assessor field will need to be edited.

1. Click on the name that is in the Assessor field. This will open the Edit assessor dialog box.

CANS (NEW) - ABUNDEZ, SEBASTIAN

Client ID: 2055639      Date of Birth: January 28, 2005  
 Client Name: ABUNDEZ, SEBASTIAN      Client Gender: MALE  
 Assessment ID:       Assessment Date: 06/17/2015  
 Assessor: Admin\_Clinical      Assessment Status: Assigned  
 Rpt Unit:         
 Tags: none

Fire Setting Module      Assessment Information

Shortcut: "alt+left arrow" or swipe left      Shortcut: "alt+right arrow" or swipe right

2. If the list of assessors shown is long, you can filter for the assessor you want by clicking Show Filter and filtering by the available options. Otherwise, skip to step 4.

Edit assessor

Assessors

ID ↑↓	Last Name ↓↑	First Name ↑↓
Assessor	Abbott	Jerrod
416	Abbott	Willow
925	Abernathy	Micheal
315	Abernathy	Iva

3. The list can be filtered by one or more fields of information about the assessor. Enter your filter selection(s), then click Filter.

Assessors Hide Filter

ID  Login

Last  First

ID ↑↓	Last Name ↓↑	First Name ↑↓
174	Abbott	Jerrod
416	Abbott	Willow

4. Click on the row listing the assessor's name.

Edit assessor ×

Assessors Show Filter

ID ↑↓	Last Name ↓↑	First Name ↑↓
498	Bashirian	Lura

Note the change in the assessor name:

CANS (NEW) - Abbott, Benjamin

Client ID: 40gLkA48 Date of Birth: March 18, 2004

Client Name: Abbott, Benjamin Client Gender: MALE

Assessment ID: Assessment Date:

Assessor: Bashirian, Lura Assessment Status:

Rpt Unit:

Tags: none

**Rpt Unit:** The Reporting Unit will pre-fill if the client is placed and open to only one RU. If the client is placed and open to two or more RUs the Rpt Unit field will be blank. If this field is blank, the correct RU must be selected.

1. Click in the empty Rpt Unit field.

**CANS (NEW) - Abbott, Benjamin**

<b>Client ID:</b>	40gLkA48	<b>Date of Birth:</b>	March 18, 2004
<b>Client Name:</b>	Abbott, Benjamin	<b>Client Gender:</b>	MALE
<b>Assessment ID:</b>		<b>Assessment Date:</b>	05/28/2015
<b>Assessor:</b>	Hilpert, Maci	<b>Assessment Status:</b>	
<b>Rpt Unit:</b>	<input type="text" value="EMQFF - WRAP (36EH1)"/> <input type="text" value="CCICMS (36811)"/>		
<b>Tags:</b>			

Shortcut: "alt+left arrow" or swipe left
Shortcut: "alt+right arrow" or swipe right

(Important: A reporting unit must be selected in order to save and submit the assessment for approval).

## 2. Select the correct RU.

**CANS (NEW) - Abbott, Benjamin**

<b>Client ID:</b>	40gLkA48	<b>Date of Birth:</b>	March 18, 2004
<b>Client Name:</b>	Abbott, Benjamin	<b>Client Gender:</b>	MALE
<b>Assessment ID:</b>		<b>Assessment Date:</b>	05/28/2015
<b>Assessor:</b>	Bashirian, Lura	<b>Assessment Status:</b>	
<b>Rpt Unit:</b>	<input type="text" value="CCICMS (36811)"/>		
<b>Tags:</b>	none		

## Assessment Data Entry

**All fields marked with an asterisk are mandatory and must be completed.**

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

**CANS (NEW) - Last1234, First1234**

<b>Client ID:</b>	1234	<b>Date of Birth:</b>	April 17, 1999
<b>Client Name:</b>	Last1234, First1234	<b>Client Gender:</b>	FEMALE
<b>Assessment ID:</b>		<b>Assessment Date:</b>	04/13/2015
<b>Assessor:</b>	Krahl, Karen	<b>Assessment Status:</b>	
<b>Org Unit:</b>	<input type="text" value="CCICMS (36811)"/>		
<b>Tags:</b>	none		

Shortcut: "alt+left arrow" or swipe left
Shortcut: "alt+right arrow" or swipe right

- To complete most fields in the assessment quickly, you can use the Pre-populate feature by clicking the Pre-populate button on the bottom toolbar of your screen.

CANS (NEW) - Abbott, Benjamin

Client ID: 40glkA48      Date of Birth: March 18, 2004  
 Client Name: Abbott, Benjamin      Client Gender: MALE  
 Assessment ID:      Assessment Date: 06/23/2015  
 Assessor: Larkin, Norene      Assessment Status:   
 Rpt Unit: CCICMS (36811)  
 Tags: none

← Fire Setting Module      Assessment Information →

Shortcut: "alt+left arrow" or swipe left      Shortcut: "alt+right arrow" or swipe right



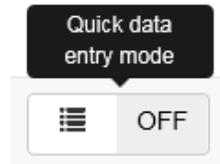
OFF   Add caregiver section   Pre-populate   Cancel   Save

- If there are approved assessments in OA for this client, a list of assessments will appear from which you can choose to prepopulate your assessment. Note: the approved assessments listed for the client may not be assessments completed by you or for your program. If this is the case, you can dismiss this option by selecting the “x” in the top, right corner.

**Pre-populate: select assessment** ×

Date	Org Unit	Status
2015-03-02	VCSSW - TAY	Approved
2015-01-08	VCSSW - TAY	Approved
2014-12-15	VCSSW - TAY	Approved

3. You also have the option to toggle “Quick data entry mode”. This option button is located at the bottom left of each screen:



If you choose to utilize “Quick data entry mode”, a screen will appear where each field can be seen on the same page. In this mode, you will scroll down the page to complete the assessment fields, instead of navigating through separate screens. Completing the assessment in “Quick data entry mode” will not be covered in this document.

**CANS (NEW) - Last1236, First1236**

Client ID: 1236      Date of Birth: July 1, 2000  
Client Name: Last1236, First1236      Client Gender: FEMALE  
Assessment ID:      Assessment Date: 04/13/2015  
Assessor:      Assessment Status:  
Org Unit: JCBHS - Healthy Homes (36D31)  
Tags: none

**Assessment Information**

Reason for assessment: \*      Add Note  
If reason for assessment is "Major Life Event", please specify:      Add Note

**Caregiver Section(s)**

1. Caregiver section(s) does not apply at this time      Add Note

**Life Domain Functioning**

2. Family \*      Add Note  
3. Living Situation \*      Add Note  
4. Social Functioning \*      Add Note  
5. Recreational \*      Add Note  
6. Developmental \*      Add Note

4. Turn off the “Quick data entry mode” by clicking the same button, which will now look like this:



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

**CANS (NEW) - Last1236, First1236**

Client ID: 1236      Date of Birth: July 1, 2000  
Client Name: Last1236, First1236      Client Gender: FEMALE  
Assessment ID:      Assessment Date: 04/13/2015  
Assessor: Krahl, Karen      Assessment Status:  
Org Unit: JCBHS - Healthy Homes (36D31)  
Tags: none

← Fire Setting Module      Assessment Information →

Shortcut: "alt+left arrow" or swipe left      Shortcut: "alt+right arrow" or swipe right

6. Enter a Reason for assessment.

7. Click Caregiver Section(s). This section states, “The Caregiver Section(s) does not apply at this time”.

- If you will be **completing caregiver information** for the assessment, leave this box **unchecked**.

- If you **will not be entering caregiver information** for the assessment, **check this box**. If you do not check this box, caregiver information WILL be required.

8. Add caregiver information by clicking the “Add caregiver section” button on the bottom toolbar.

Note: You can add this information at any time during the completion of the assessment.

- A box displaying the current caregivers, if any have been previously entered into OA, will show.

First Name	Last Name	Relationship
John	Doe	Adoptive Father

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

**Select caregiver**

First Name	Last Name	Relationship
John	Doe	Adoptive Father



**10. Add a new caregiver to the current list 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 of the caregiver (as shown below).

**Select caregiver**

First Name	Last Name	Relationship
John	Doe	Adoptive Father
NEW	CAREGIVER	Adoptive Mother



**11. Multiple caregivers can be added. The Save button must be clicked after each caregiver entry before a new caregiver can be added.**

- You can add as many caregivers as needed by repeating the above process.

**12. If you wish to exit the caregiver screen for any reason, click the “x” at the top, right of the caregiver box, or click anywhere outside of the box.**

**Select caregiver** ✕

First Name	Last Name	Relationship
John	Doe	Adoptive Father
NEW	CAREGIVER	Adoptive Mother

**13. Otherwise, once all caregivers have been added and saved, click the row of the caregiver you want to enter assessment scores.**

First Name	Last Name	Relationship
JOHN	Doe	Adoptive Father
NEW	CAREGIVER	Adoptive Mother

14. The assessment information screen for the selected caregiver will appear.

- Select the Caregiver Type from the drop down list.
- Complete the eleven (11) Caregiver Needs & Strength questions.

15. To add another caregiver, repeat the steps 13 and 14 above until you have added information for all of your caregivers.

16. Click the blue Life Domain Functioning button.

- A list of 14 items numbered from 2 through 15 will appear

CANS (NEW) - Last2037948, First2037948

Life Domain Functioning

2. Family *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
3. Living Situation *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
4. Social Functioning *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>

There are 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 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 the mouse.
- ✓ Notice in the screen shot below that scores requiring action generate background color-coding that matches the severity of the score. (2 = yellow; 3 = red).

CANS (NEW) - Last1234, First1234

Life Domain Functioning

2. Family *	<input type="text" value="1"/>	<input type="radio"/> 0 <input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
3. Living Situation *	<input type="text" value="2"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input checked="" type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
4. Social Functioning *	<input type="text" value="3"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input checked="" type="radio"/> 3	<a href="#">Add Note</a>
5. Recreational *	<input type="text" value="1"/>	<input type="radio"/> 0 <input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>

17. Continue through the assessment completing all required sections and modules by pressing the blue directional buttons.

18. If at any time, you would like to add a note to one of the items, click the Add Note button.

CANS (NEW) - Last1234, First1234

Assessment Information

Reason for assessment: \*

If reason for assessment is "Major Life Event", please specify:



< General Information

Caregiver Section(s) >

19. A text box will open. Enter your note.

20. Click Apply.

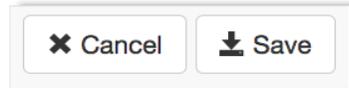
Note for Reason for assessment:

×

Cancel

Apply

21. Once you have completed all required domain items and modules, click the Save button located at the bottom right of the screen.

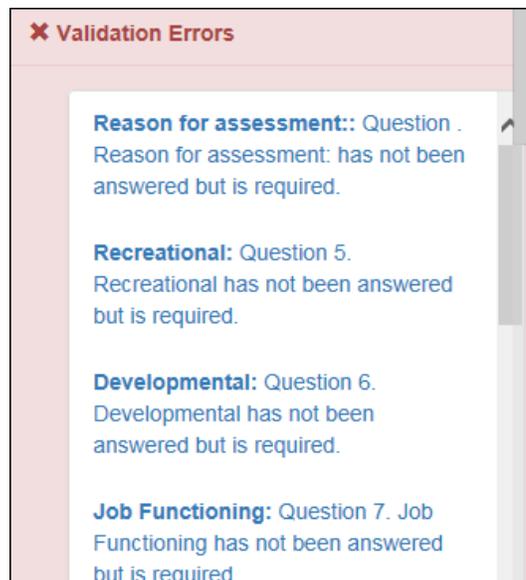


22. Once you are satisfied that your assessment is complete, click Submit to send the assessment to your supervisor for approval.



## Validation Errors

1. Assessments submitted with missing required information will receive a validation error dialogue box.
  - This is designed to ensure that all parts of the assessment have been completed before submission.
  - The box, entitled Validation Errors, will list all of the items in the CANS-SB (giving the item number and item name or full question) that must be completed.



2. To complete required items, click an error message showing in the Validation Error box to move the screen to that section of the assessment, and then click the paper and pencil icon located at the top, right corner of that section.

Life Domain Functioning	
2. Family	1
3. Living Situation	2
4. Social Functioning	3
5. Recreational	
6. Developmental	
7. Job Functioning	
8. Legal	
9. Medical	
10. Physical	
11. Sexuality	
12. Sleep	
13. School Behavior	
14. School Achievement	
15. School Attendance	

**3. The section will open allowing for item completion.**

- Notice that the Validation Error box has minimized to the right side of the screen. After entering missing scores, click the arrow located around the middle of the Validation Error bar (see the red arrow that is pointing to the left, below) to open the Validation Error box to select the next section/item that must be completed.

Child/Youth Risk Behaviors			
45. Suicide Risk *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
46. Self-Mutilation *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
47. Other Self Harm *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
48. Danger to Others *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
49. Sexual Aggression *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
50. Runaway *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
51. Delinquency *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
52. Judgment *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
53. Fire Setting *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>
54. Social Behavior - Sanction Seeking *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	<a href="#">Add Note</a>

[← Child/Youth Behavioral/Emotional Needs](#)
[Ages 0 through 5/Early Development Module →](#)

- Enter all missing scores and then click Save.

**4. Click Submit to submit the assessment to your supervisor for approval.**



*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 of the screen. The options (buttons) shown below vary depending on your Objective Arts role.

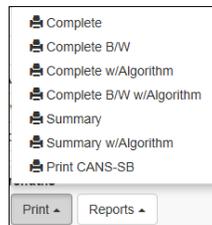


✓ **+/- icons:** the plus/minus icons on the far left of the bar allow you to expand or collapse the domains and modules in the assessment. Selecting the plus will show each individual domain/module items. Selecting the minus will only show the domain and module headings.

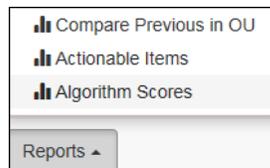
✓ **Filter:** allows you to filter by assessment scores. For example, you can filter to see assessment scores of "2s & 3s" or for "3s only".



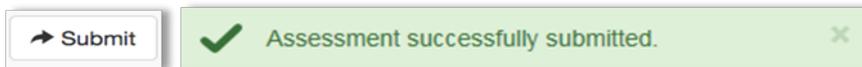
✓ **Print:** The print options (shown below) allow you to print the assessment in various forms. You can print a complete version that is color-coded or black and white that looks like the version shown after an assessment has been saved in OA. The Summary print version is a shortened assessment report that shows only the domain and module names color coded to match the highest reported assessment score (2 = yellow, 3 = red). Algorithms Scores are not available, this print options does not work. The Print CANS-SB is the most used option as this version looks very much like the hardcopy CANS-SB score. NOTE: each document will open in a new window of your browser.



✓ **Reports:** The reports tab show 3 different reports based on the assessment data; however, currently the report Algorithm Scores, is not available. The Actionable Items report shows only those items scores of a 2 or 3. The Compare Previous in OU report is a report that compares the current assessment with any previous assessment scores in OA for the client. NOTE: each report will open in a new window of your browser.



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



✓ **Submit and Approve:** The Submit and Approve option (available only to those with the role of supervisor or above) allows the assessment to be submitted and immediately approved in one click. If successful, you will see a confirmation that says that the assessment was successfully submitted. If unsuccessful, you will receive validation errors.

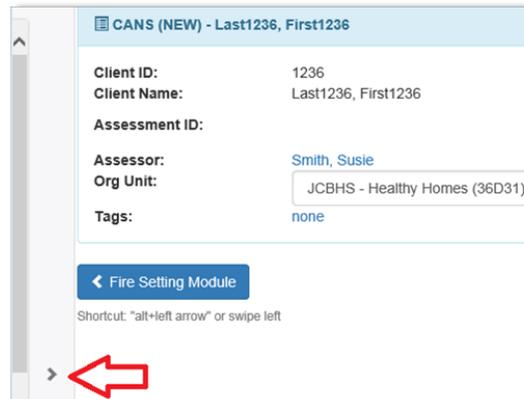


✓ **Edit:** the Edit option allows you to change information in the assessment.

✓ **Delete:** the Delete option allows for the deletion of an assessment. Delete ability is determined by the level of permissions assigned to an OA role. For example, Only a Domain Clinical Administrator can delete a CANS assessment that has already been approved in the system.

## Side Panel

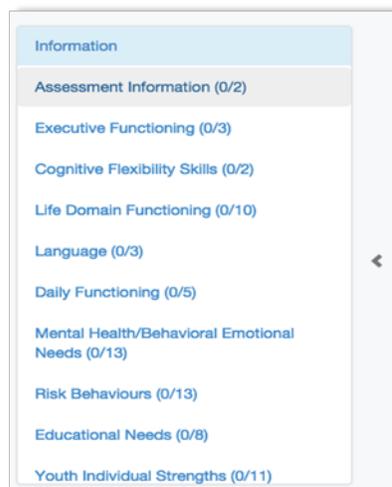
When in an assessment, to the left side of the screen you will see a bar with an arrow.



### 1. This arrow can be clicked to expand the panel.

- The purpose of this side panel is two-fold: 1) it provides a summary level, color-coded view (by actionable scores) of the domains and modules; and, 2) it allows you to advance to the assessment domain or module of your choice instead of navigating through each screen.

This example is of the panel before assessment scores have been entered. Each section shows that no questions have been answered.



This example is of the panel once assessment scores have been entered.



## 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 where the client's information appears.

- After selecting a client you will navigate to that client's Assessments screen. If the client has assessments entered into OA for him/her, there will be a list of those assessments. **Note:** when a client is open to your program RU, you are allowed to see all of the client's assessments, even those created in programs and agencies that you are not assigned to. This screen will show all of these assessments. If there are no assessments in the system for the client, the screen will be blank and state "No data found!" (see below).

Assessments		Incidents	
Assessments List for Barrows, Aliya			
Start typing a last name			<input type="button" value="Show Filter"/> <input type="button" value="Refresh"/>
ID ↑↓	Instrument ↑↓	Client Name ↑↓	Date ↓↑
No data found!			

- The list of assessments, if any, can be sorted and/or filtered.

3. Once the correct assessment is located, click the row where the assessment information appears.

- The assessment will open in the following format:

**CANS - Abbott, Benjamin**

<b>Client ID:</b> 4031-AA45	<b>Date of Birth:</b> March 18, 2004
<b>Client Name:</b> Abbott, Benjamin	<b>Client Gender:</b> MALE
<b>Assessment ID:</b> 1432	<b>Assessment Date:</b> May 16, 2013
<b>Assessor:</b> Little, Maximus	<b>Assessment Status:</b> Approved by Jacobson, Jamerson on 05/15/2013
<b>Rpt Unit:</b> CCR(CAR (0681))	
<b>Tags:</b> none	

---

**Assessment Information**

Reason for assessment: Initial

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. Living Situation	0
4. Social Functioning	2
5. Recreational	0
6. Developmental	2
7. Job Functioning	NA
8. Legal	0
9. Medical	0
10. Physical	0
11. Sexuality	0
12. Sleep	0
13. School Behavior	2
14. School Achievement	0
15. School Attendance	0

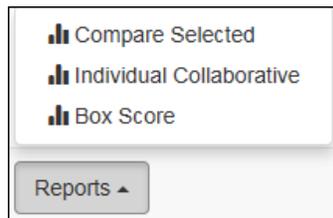
- Depending upon the status the assessment is in (assigned, submitted or approved) and your permission levels, from this screen, you may be able to review, edit, submit, print, submit or delete the assessment. You can also access the other functions on the toolbar along the bottom of your screen.

- Note: If an assessment has been approved, the header bar of the assessment will be green. Assessments in the assigned or submitted status will have a blue header.

CANS - Last1234, First1234			
Client ID:	1234	Date of Birth:	April 17, 1999
Client Name:	Last1234, First1234	Client Gender:	FEMALE
Assessment ID:	95178	Assessment Date:	March 16, 2015
Assessor:	Smith, Susie	Assessment Status:	Approved by Smith, Susie on 04/07/2015
Org Unit:	CCICMS (36811)		
Tags:	none		

## Creating Individual Assessment Reports

There are three reports that can be generated for a client from the clients Assessment List screen that is based on the client's assessment data. Below are instructions for generating two of these reports. The third report will be covered in a separate Objective Arts Reports Manual.



1. **Navigate to a client's Assessments List** (as instructed above).
2. For the **Compare Selected** report, select the assessments you would like a comparison report for by clicking the checkbox to the left of each row. Up to five (5) assessments can be selected for comparison.
3. For the **Individual Collaborative** report, select only two assessments you would like a report for by clicking the checkbox to the left of each row.
  - Note: At least two assessments must be selected for the reports to generate.

Assessments List for Last1234, First1234 Start typing a last name [Show Filter](#)

ID #	Instrument #	Client Name #	Date #	Status #
<input type="checkbox"/>	95205	CANS Assessor: Smith, Susie Reporting Unit: COICMS (36811)	Last1234, First1234 April 9, 2015	Assigned
<input type="checkbox"/>	95203	CANS Assessor: Smith, Susie Reporting Unit: COICMS (36811)	Last1234, First1234 April 7, 2015	Assigned
<input checked="" type="checkbox"/>	95178	CANS Assessor: Smith, Susie Reporting Unit: COICMS (36811)	Last1234, First1234 March 16, 2015	Approved by Smith, Susie on 04/07/2015
<input type="checkbox"/>	95185	CANS Assessor: Krahl, Karen Reporting Unit: COICMS (36811)	Last1234, First1234 March 16, 2015	Submitted
<input type="checkbox"/>	95179	CANS Assessor: Smith, Susie Reporting Unit: COICMS (36811)	Last1234, First1234 March 10, 2015	Submitted
<input checked="" type="checkbox"/>	95170	CANS Assessor: Krahl, Karen Reporting Unit: COICMS (36811)	Last1234, First1234 March 9, 2015	Approved by Krahl, Karen on 03/16/2015

Compare Selected  
 Individual Collaborative  
 Box Score

Reports <
+ New Assessment <
Delete

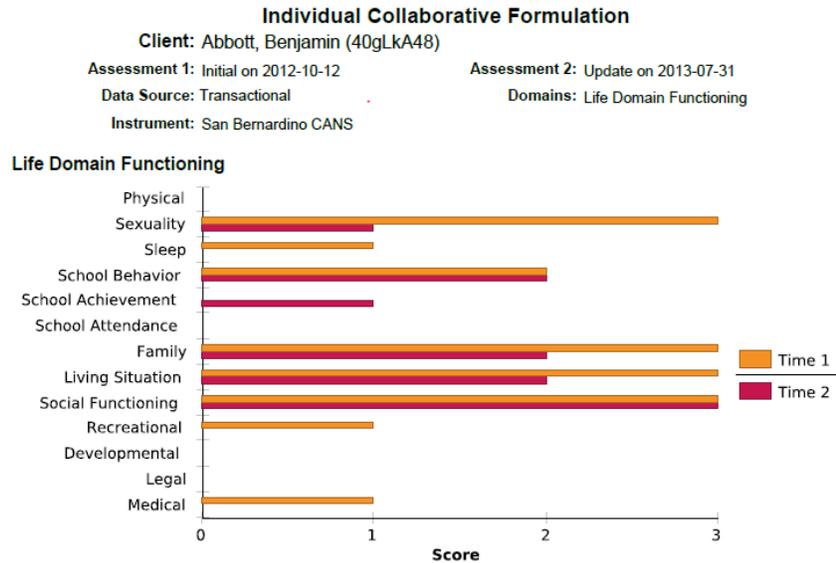
4. Select the report button on the bottom left of your screen to reveal the menu of report options.
5. Click the name of the desired report.
  - The report will open in a new window in your browser.

### Sample Reports

This Compare Selected report is a compares side by side comparison of selected assessments to show client score changes over time.

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
<b>Assessment Information</b>				
Reason for assessment:		Initial	Initial	Update
If reason for assessment is "Major Life Event", please specify:				
<b>Caregiver Section(s)</b>				
1	Caregiver section(s) does not apply at this time	Yes		
<b>Life Domain Functioning</b>				
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 a comparison of time one and time two (e.g. Initial versus Update) assessment scores.



### Assessment Approval (A task for Supervisors and Clinical Administrators Only)

1. From the Client List, click the Assessments option from the top Menu Bar and select Approve from the drop-down menu.



- A list of Assessments in a submitted status presents. This list is sortable by ID number, instrument, client name, date, or status of assessment.

2. A list of submitted Assessments will display.

ID ↑↓	Instrument ↑↓	Client Name ↑↓	Date ↓↑	Status ↑↓
<input type="checkbox"/> 92980	CANS Assessor: Moen, Kenya Reporting Unit: DMCC - SATS-AV (36CGE)	Shields, Enoch	March 16, 2012	Submitted
<input type="checkbox"/> 57309	CANS Assessor: Wisozk, Coralie Reporting Unit: DMCC - SATS-AV (36CGE)	Schoen, Tyra	March 16, 2012	Submitted
<input type="checkbox"/> 53569	CANS Assessor: Schimmel, Kallie Reporting Unit: DMCC - SATS-AV (36CGE)	Parisian, Pasquale	March 22, 2012	Submitted
<input type="checkbox"/> 61134	CANS Assessor: Corwin, Marco Reporting Unit: DMCC - SATS-AV (36CGE)	Greenfelder, Gavin	March 23, 2012	Submitted

3. There are three ways you can choose to approve assessments from this screen. One way is to simply click on a row of assessment information showing to have that assessment open

up to approve. The second way is to approve using the Sequential Approve button. The third way is to approve using the Batch Approve button. The Sequential and Batch Approve methods are covered below.

- As you approve, you can refresh the list periodically by clicking  icon located to the right of the Show Filter button, to see if any other assessments have arrived for approval.
4. The assessments to be approved can be filtered based on client or assessor information by using the Show Filter button. The Instrument and Status fields offer drop down menus for further refinement.



- The Sequential and Batch Approve options are similar approval processes, but offer slightly different assessment form views. Both can be accessed via the toolbar at the bottom, right of the screen.

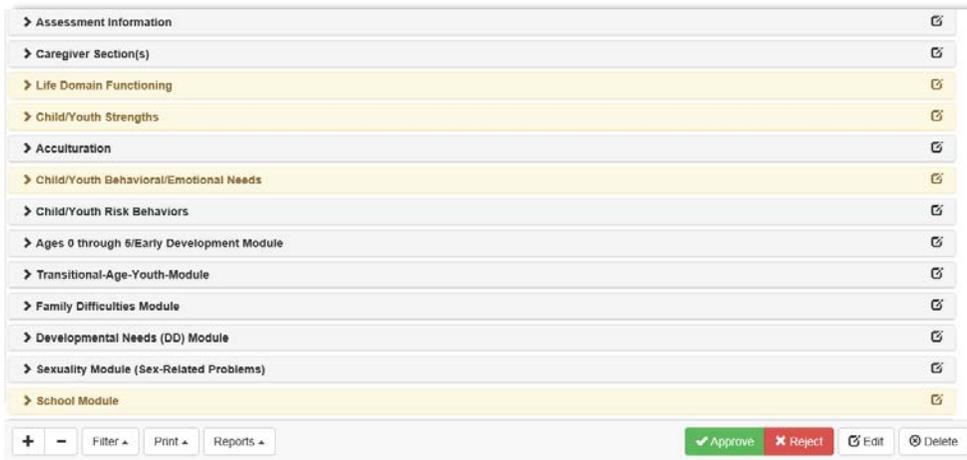


### Sequential Approve

- Click the Sequential Approve button at the lower right of the screen to access Assessments in need of approval.



- The first assessment in the list of assessments will open in the format below:



- From here you can approve or reject each listed assessment on a rolling basis. For example, once approve/reject the first assessment, the second assessment in the list opens for you to approve/reject, then the third, and so on. In this view, you can also Edit before approving it, if necessary.

### Batch Approve

1. Click the **Batch Approve** button at the lower right of the screen to access Assessments in need of approval.

- If you first filter your list (E.g., by RU or assessor), only those assessments meeting the criteria will show in the batch approval list.



- In this view, to the left of the screen is a panel of the assessments that need approval.
- To the right of the screen will display the first CANS-SB score sheet that needs approval. Notice that this assessment format is much like the CANS-SB hardcopy score sheet.

CHECK ONE:

**CHILD AND ADOLESCENT NEEDS AND STRENGTHS (CANS) - SAN BERNARDINO**

Date Assessed: 01/31/2013  Initial CANS  Update CANS  Transition/Discharge CANS  
 Assessment Status: Submitted Child/Youth's Name: Last1005218; First1005218  
 Date of Birth: 10/26/2004 Age: 10  Under 6 YIO  Over 15 YIO  
 Assessor's Name: MATTHEWS, SARAH Medical Record No: 1009218  
 Signature: \_\_\_\_\_

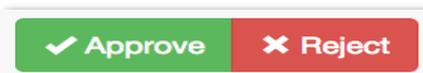
LIFE DOMAIN FUNCTIONING		CAREGIVER STRENGTHS & NEEDS	
0 = no evidence of problems	1 = history, mild	Caregiver Assessment(s) Present	NO
2 = moderate	3 = acute	<b>CHILD BEHAVIORAL/EMOTIONAL NEEDS</b>	
		0 = no evidence of problem	1 = no sub-threshold
		2 = signif. meets cr.	3 = severely dangerous
Family *	1	Psychosis	0
Living Situation	1	Impulsivity/Hyperactivity	0
Social Functioning	0	Depression	0
Recreational	0	Anxiety	0
Developmental *	1	Oppositional	2
Job Functioning	0	Conduct	0
Legal	0	Adjustment to Trauma *	0
Medical	0	Anger Control	2
Physical	0	Eating Disturbances	0
Sexuality *	0	Affect Dysregulation	1
Sleep	0	Behavioral Regressions	0
School Behavior *	1	Socialization	0
School Achievement *	1	Substance Use *	0
School Attendance *	0		

CHILD/YOUTH STRENGTHS		CHILD RISK BEHAVIORS	
0 = caregiver	1 = self	0 = no evidence of problem	1 = MC - VIOLENCE/INJURY
2 = identified	3 = not yet identified	2 = recent - ACT	3 = acute - ACT (IMMED)
Family	0	Runaway Risk	0
Interpersonal	0	Self-Mutilation	0
Optimism	0	Other Self Harm	1
Educational	3	Danger to Others *	0
Vocational	0		

- You will be able to approve/reject the assessment and move to the next assessment automatically, much like in Sequential Approval.

Assessments 		
ID	Client Name	Date
55532	Last1089218, First1089218	2013-01-31
53998	Last2028366, First2028366	2013-03-14
7243	Last2060666, First2060666	2013-03-18
6444	Last2082662, First2082662	2013-06-05
47766	Last2059710, First2059710	2013-07-17
44869	Last2030156, First2030156	2013-07-19

2. For both processes, you will be able to click the buttons (shown below) to either approve or reject the given assessment.



- In Batch Approval mode, you are NOT able to edit the assessment before approving. If the assessments must be edited, you will need to exit Batch Approval mode.
- After you approve the assessment, you will see a green confirmation box near the top right that says "Assessment successfully approved".



- If you choose to reject the assessment, you will receive Reject Assessment Note box in which you must note why the assessment is being rejected. The rejected assessment will be sent back to the assessor's ToDo box.

Reject Assessment Note 

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Reject

3. Once you have entered your reason, click reject to confirm the rejection. If necessary, click the “x” at the top right to cancel the Reject Note process. You cannot reject an assessment without submitting a reject note.

- Once you click reject, you will see a green confirmation box near the top right that says “Assessment successfully rejected”.



## Administration

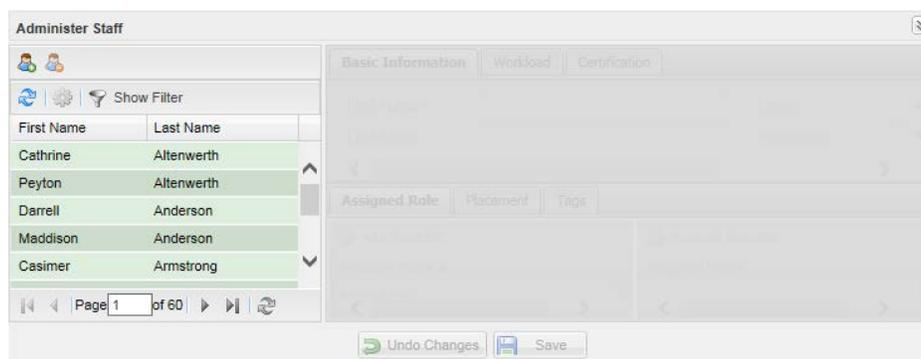
1. From the Home screen, click the Admin box to begin managing Administration tasks.



- Depending on your browser settings, you may see “Only secure content is displayed”, along the bottom of the screen. If so, and you are working on a private computer (not used by the general public), click “Show all content”.



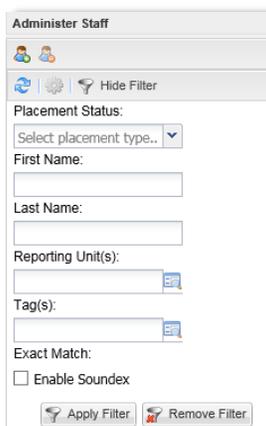
- You are now at the **Administer Staff** screen. On this screen you will see the following.



## Filtering the Staff List

### 1. Click the Show Filter button on the left-hand side of the screen.

- A filter section will open. (With no filters selected, the list will default to showing all placed staff sorted by Last Name.)

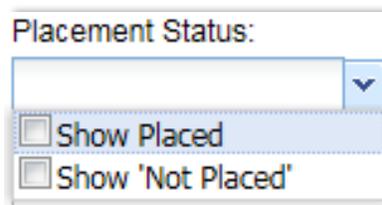


- Placement Status has two options to sort by.

### 2. If you only want to see the staff that has a placement, check Show Placed.

### 3. If you only want to see staff that is not placed, check Show 'Not Placed'.

### 4. If you want to show all Staff, whether placed or not, click both boxes.



✓ **First Name:** to filter by first name of the staff member.

✓ **Last Name:** to filter by last name of the staff member.

✓ **Reporting Units:** to filter by a specific (or multiple) reporting unit(s).

✓ **Tags:** to filter by specific tags that have been assigned to the staff member. (Not active at this time.)

✓ **NOTE:** It is NOT necessary to enter information in all of the search boxes. Enter as much or as little information as necessary to narrow the fields.

### 5. To filter by Reporting Unit filter, click the magnifying glass to the right of the filter.

**Administer Staff**

Hide Filter

Placement Status:  
Select placement type..

First Name:  
[Text Field]

Last Name:  
[Text Field]

Reporting Unit(s):  
[Dropdown Menu]

Tag(s):  
[Text Field]

Exact Match:  
 Enable Soundex

Apply Filter Remove Filter

6. From here, type the RU that you are looking for in the blank field or find it manually by expanding the arrows and clicking the appropriate check box(es).

**Reporting Units**

[Search Field]

- San Bernardino County (SBC)
  - Christian Counseling Service (CCS)
  - Chino Valley Unified School District (CVUSD)
  - David & Margaret (D&M)
  - DBH (DBH)
    - CCICMS (36811)
    - Behavioral Health - Needles (36CS1)
    - JCBHS - Healthy Homes (36D31)
    - CASE (CASE)
    - Juvenile Justice Programs (JJP)

7. Click OK to return to the Filter.

8. Click Apply Filter or press Enter on your keyboard.

- The filter will then return your results.

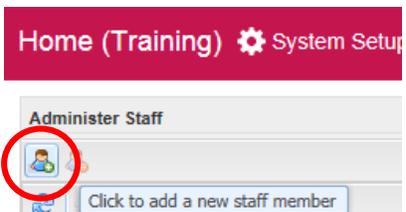
**Administer Staff**

Show Filter

First Name	Last Name
Aavid	Jones

*Adding a New Staff Member*

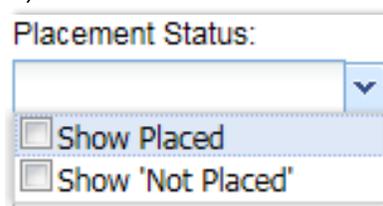
1. **Access the Administer Staff Screen. Click the Add a New Staff Member Button near the top left.**



- A box will open to enter the staff member's information.
- Enter the staff member's profile information, all fields are required.
- The Login will be the staff member's SIMON number.
- Click Save.

A screenshot of a dialog box titled 'Add Staff Member'. It contains four input fields: 'First Name', 'Last Name', 'Email', and 'Login'. The 'First Name' field has a red dashed border and a red exclamation mark icon to its right, indicating a validation error. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

2. **Click Show Filter to filter for the new staff member.**
3. **Under Placement Status, select Show Placed and Show 'Not Placed'.**
  - Because the account you have created has not yet been assigned to an RU, you must select Show 'Not Placed' in order to be able to see the staff member you just selected. However, you want to also select Show Placed so that you will be able to see the staff member once you have "Placed" them (assigned them to an RU).



4. **Enter any further filter criteria you wish (e.g. First name, etc.), then click Apply Filter**
5. **Double click the name of the staff member to pull up the staff profile.**

6. **Assign a password and confirm the password in the Again box.**
  - Passwords require at least seven characters, one number, and one uppercase letter.

Basic Information		Workload	Certification
First Name:	David	Login:	5555555555
Last Name:	Fogg	Password:	
Email:	dfogg@dbh.wbcounty.gov	Again:	
Gender:	<input type="radio"/> Male <input type="radio"/> Female	Status:	<input checked="" type="checkbox"/> Active
Job Title:		Cell Phone Number:	

**!** Password must be more than 6 characters long. Password must have at least 1 number. Password must have at least 1 uppercase letter.

7. **Activate the profile by checking the Active box.** If you want to deactivate a user, you would uncheck this box.

Basic Information		Workload	Certification
First Name:	John	Login:	SIMON NUMBER
Last Name:	Doe	Password:	
Email:	JDoe@dbh.sbcounty.gov	Again:	
Gender:	<input type="radio"/> Male <input type="radio"/> Female	Status:	<input checked="" type="checkbox"/> Active
Job Title:			

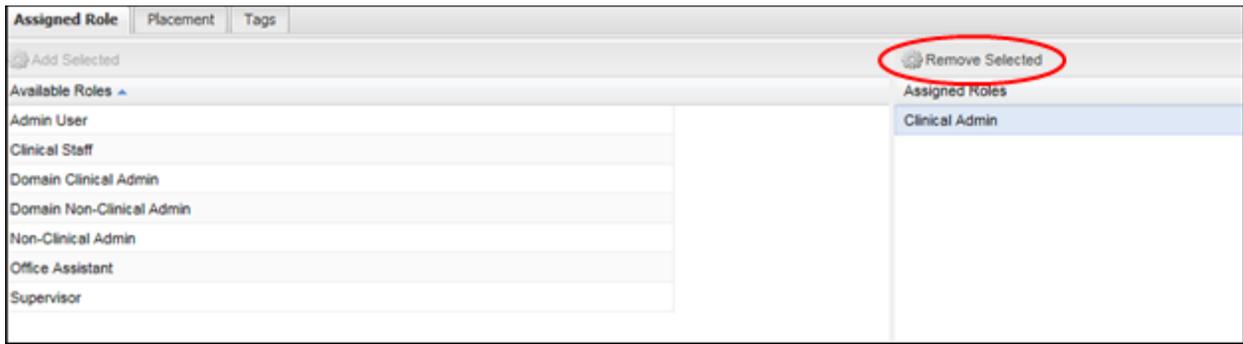
### Assign/Remove Role

Note: You cannot assign a role with permissions greater than your own. Assign only one role per staff member.

1. **On the Assigned Role tab in the Available Roles pane, click on the appropriate role for the staff member.**

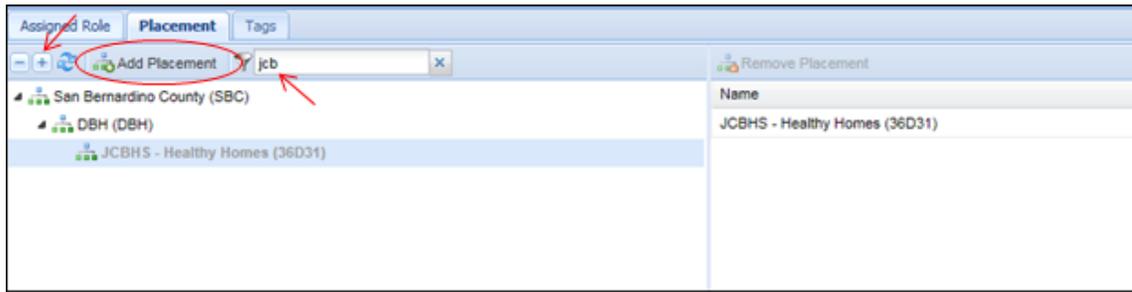
Assigned Role	Placement	Tags
<input checked="" type="checkbox"/> Add Selected		<input type="checkbox"/> Remove Selected
Available Roles		Assigned Roles
Admin User		
Clinical Admin		
Clinical Staff		
Domain Clinical Admin		
Domain Non-Clinical Admin		
Non-Clinical Admin		
Office Assistant		
Supervisor		
<input type="button" value="Undo Changes"/> <input type="button" value="Save"/>		

2. **Click Add Selected.** The role will appear in the Assigned Roles pane on the right.
3. **To remove a role, click on the item in the Assigned Roles pane, and then click Remove Selected.**

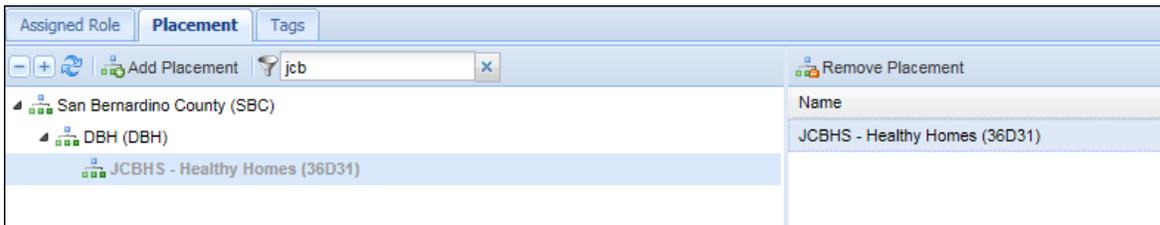


### Add/Remove Placements

1. Click on the Placement tab.
2. Click on the + icon to expand the organization hierarchy. Or, begin typing the RU or program name in the filter box to the right of Add Placement.
3. Click on the RU(s) that this user is associated with.
4. Click Add Placement, or drag and drop the RU in the pane on the right to complete the association. The program name and RU will appear in the right pane.



5. To remove an RU, click on the item in the right pane and then click on Remove Placement.



6. To save your changes click the Save button at the bottom of the screen.



### Viewing User Responsibilities

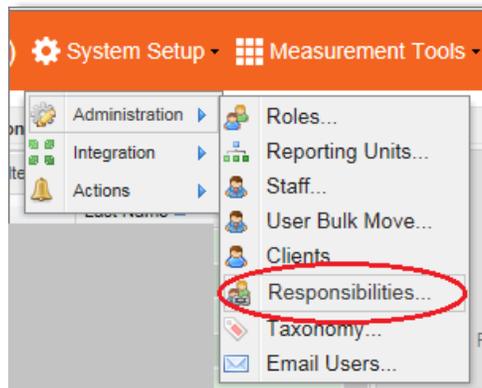
Responsibility assignment is what determines the user's ability to view clients and staff assigned to a specific RU. Responsibilities are automatically assigned and removed when Placements are assigned and removed.

Because of this automatic link with Placements, there should be no need to review Responsibilities; however, if the user experiences a problem viewing clients and/or staff, but their Placements are correct, the user's Responsibilities should be viewed to be sure that the Responsibilities have not somehow been removed.

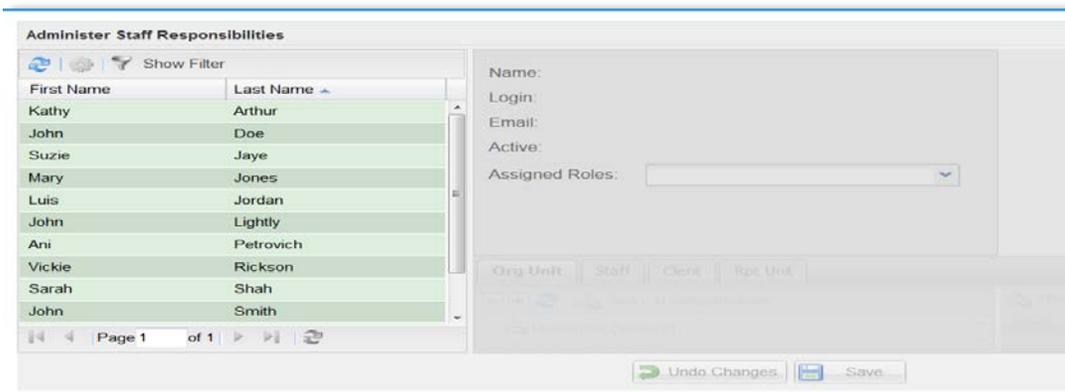
1. To view a staff member's responsibilities, click the Admin box from the Home screen.



2. Click System Setup at the top, hover over Administration on the sub menu, click Responsibilities.



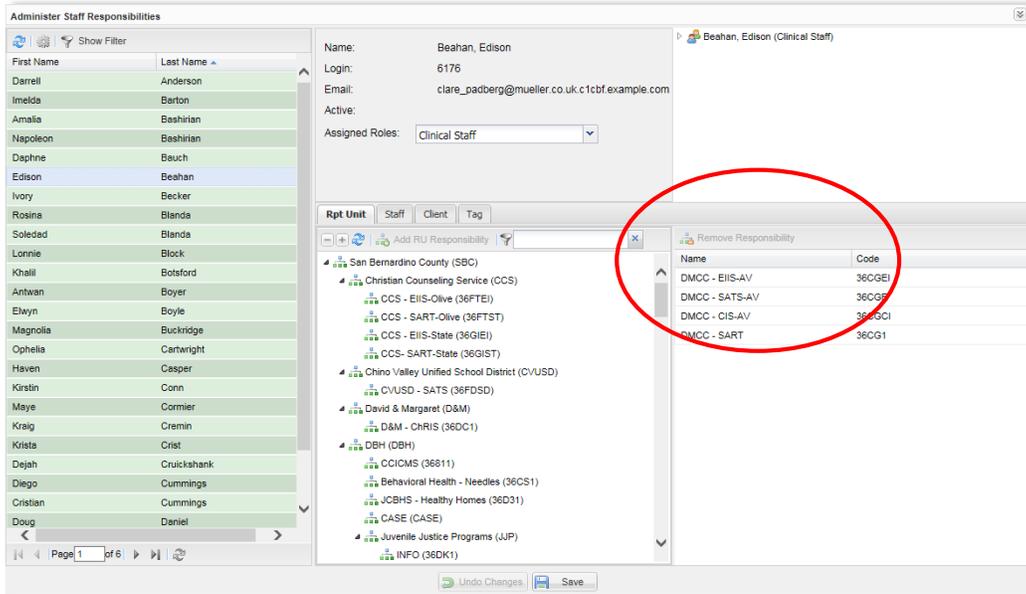
- The Administer Staff Responsibilities screen appears:



- Filter for the staff member to view the responsibilities.

3. Select the staff member by double clicking on the staff name to show the responsibilities. The staff member's responsibility shows in the far right pane.

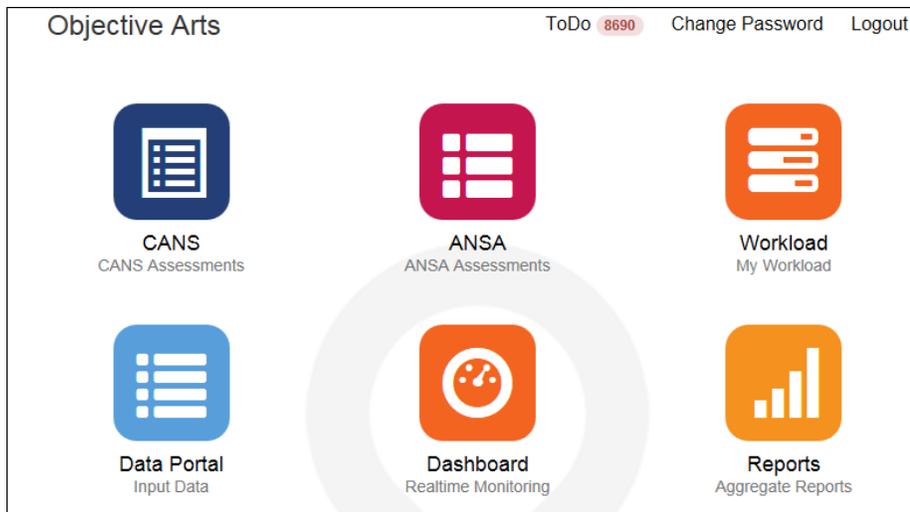
- Verify that the RU(s) showing on the right, match all the RU(s) that show in the staff member's Placements on the Placement screen. If they do not, and RU(s) Responsibility is missing, you will need to add the RU(s) here in Responsibilities in the same manner RUs for Placement are added (review the Add/Remove Placements section if necessary).



## Logging Out

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

From the Home screen:



From a specific screen (e.g. Administer Staff screen):



Close your browser after your OA session for security.

**If you need further assistance**, please contact your agency's Objective Arts super user. Super users are the point persons for all OA related questions. Program specific OA super users will contact DBH directly with Objective Arts questions and issues beyond their scope of knowledge.