County of San Bernardino

Objective Arts (OA) Training Manual Administration

Children and Youth Collaborative Services (CYCS)

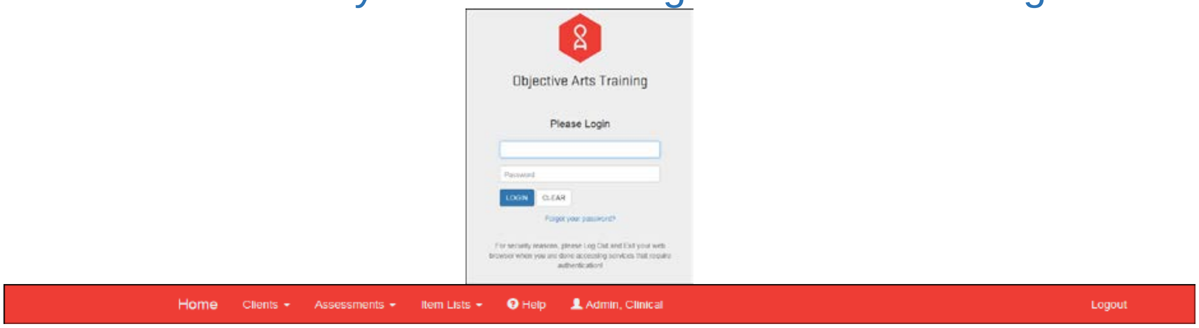
DBH CYCS
7-16-2015

Table of Contents

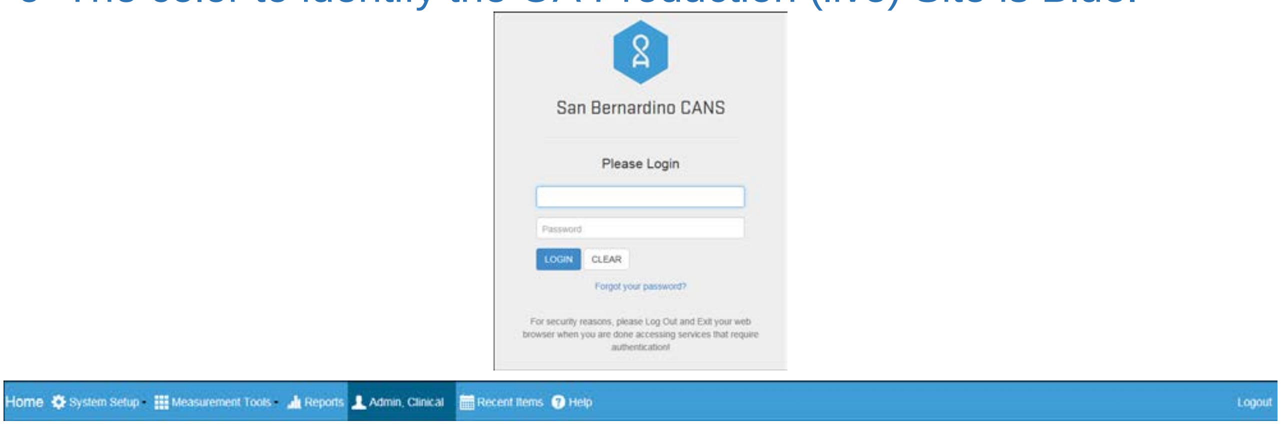
Important Notes

- 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.



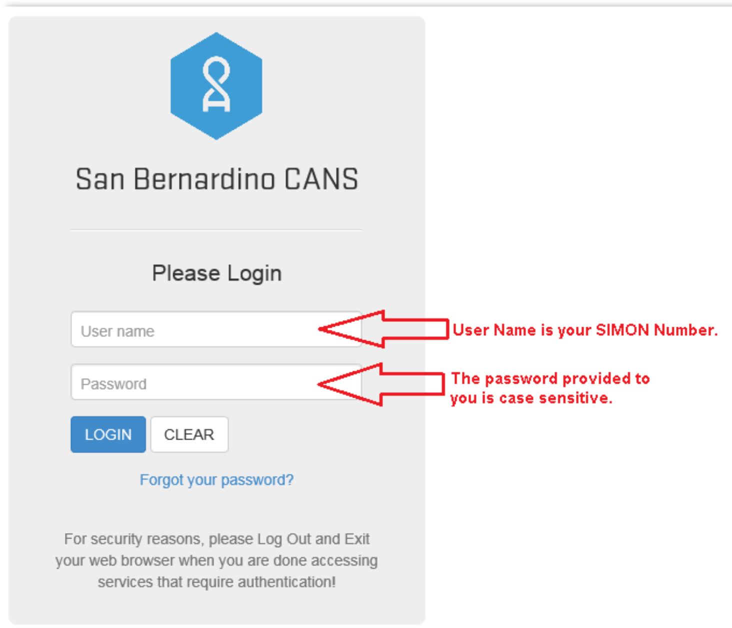
- Objective Arts website addresses:
    - Training: https://training-sbcans.oasmr.com.
    - Production: https://sbcans.oasmr.com.

- 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.

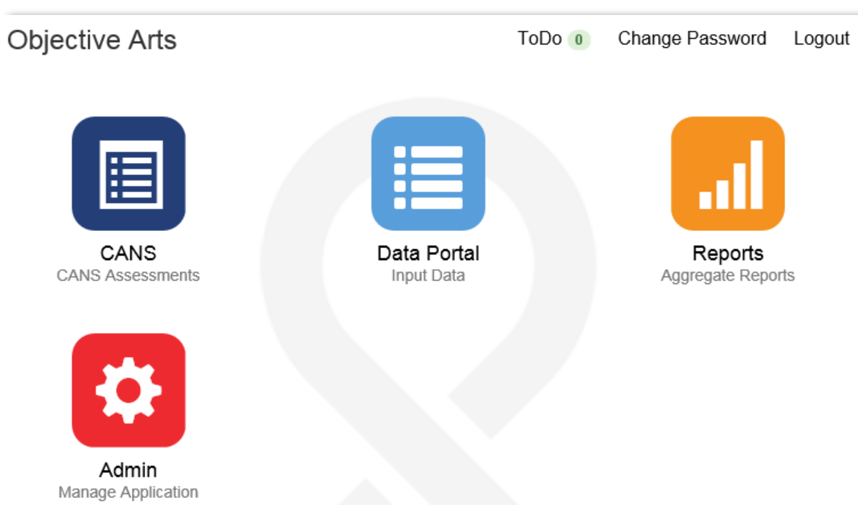
Logging in to Objective Arts

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.**



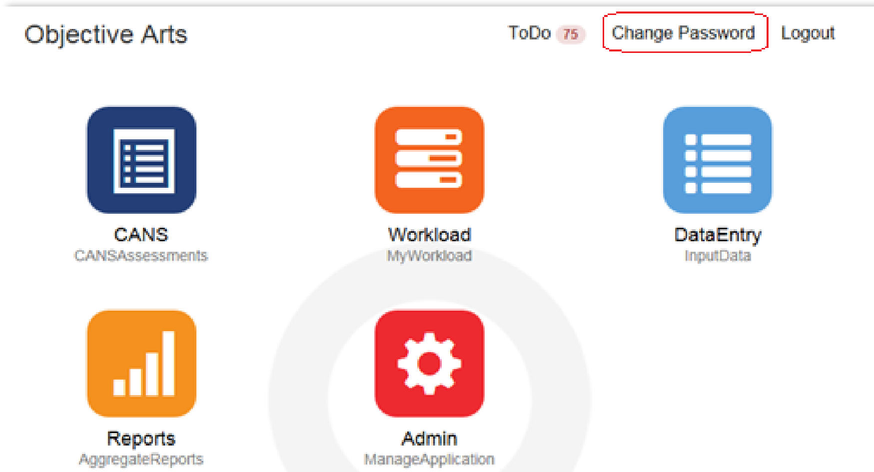
After logging in, the following screen appears. This screen is referred to as the Home screen. The options on this screen will depend on your role in Objective Arts.



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**.

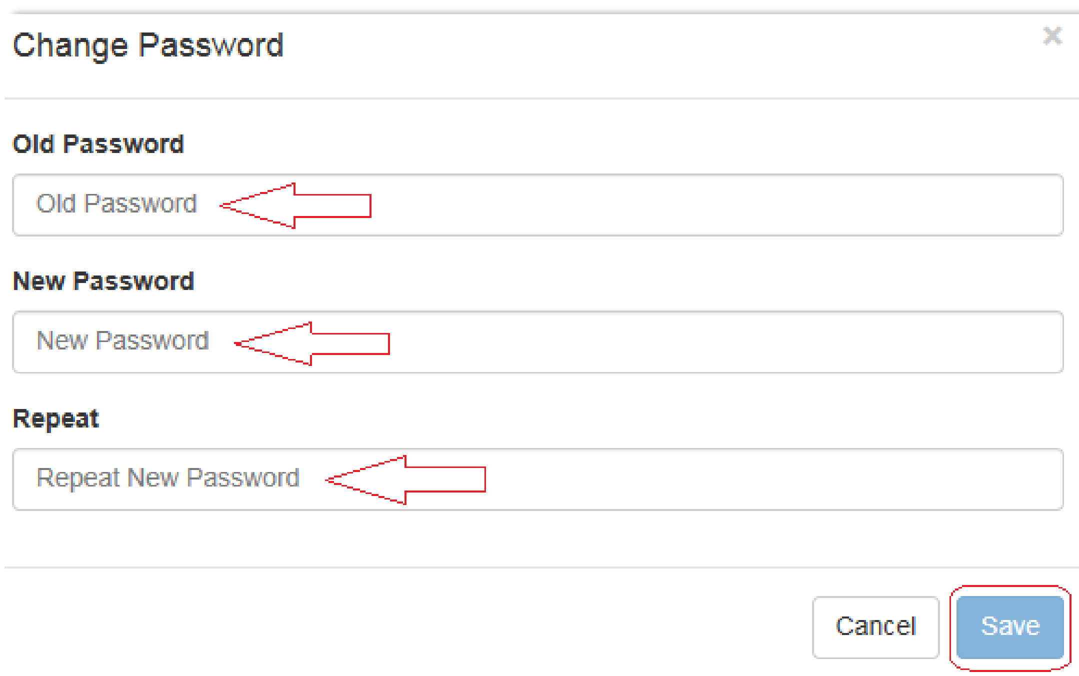
1. **Click on the Change Password link at the top right of the page.**



2. **Enter your old password.**

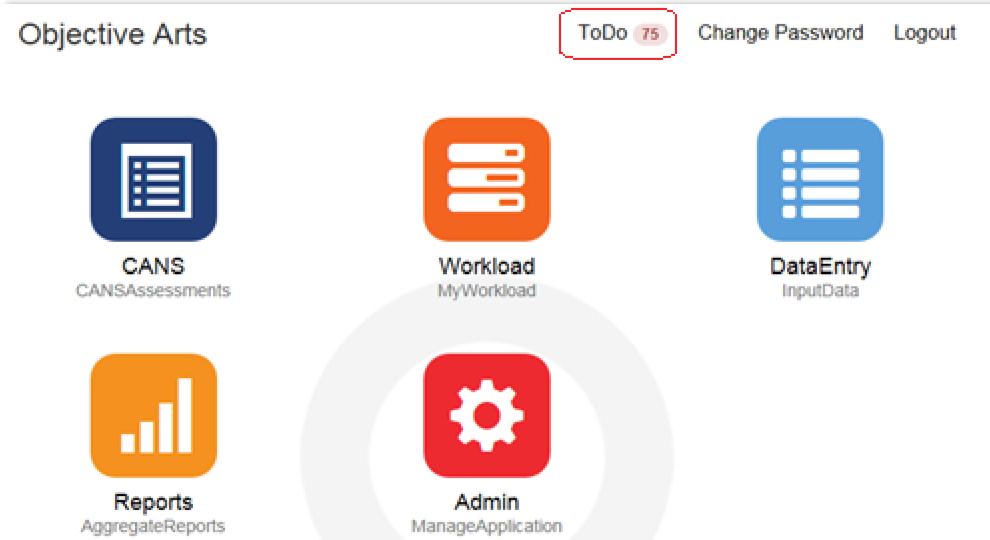
3. **Next enter your new password**
   - Passwords must be at least seven characters in length, include at least one number and one capital letter.
   - Repeat the new password.

4. **Click Save.**

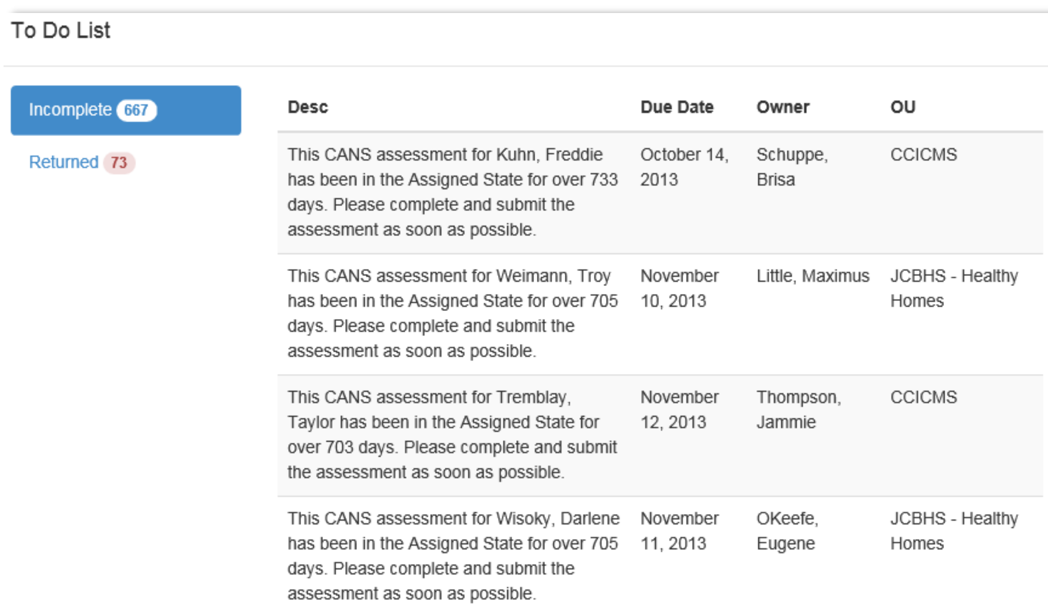


To Do List

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.



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

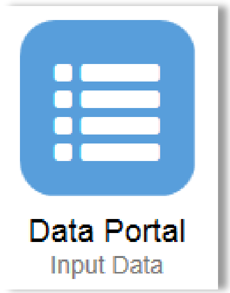
2. **Click on a client description (i.e., Desc) and the assessment will open.**

- You will then be able to create, edit, submit or approve the assessment.

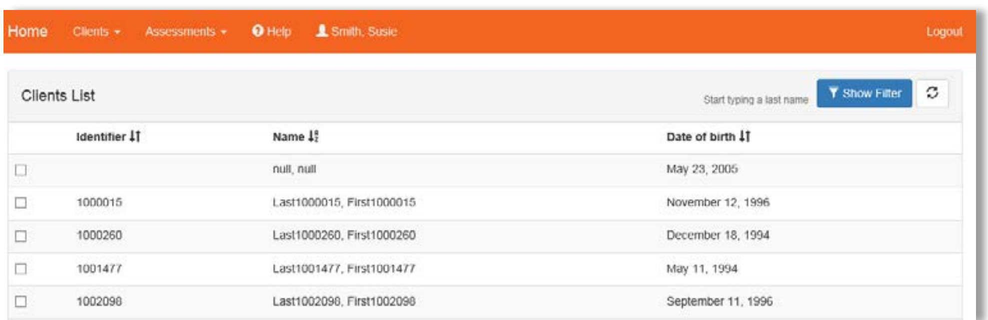
Data Portal

Client List

1. **From the Home screen, click Data Portal.**

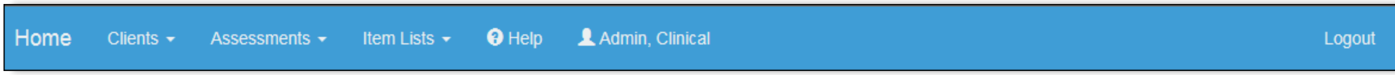


After clicking on Data Portal, you will see the following:
Please Note: In the actual Production site the menu bar will be blue. While we will try to present screen shots from the Production site for familiarity of the site, in order to show only de-identified information in this training manual, sometimes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



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”.

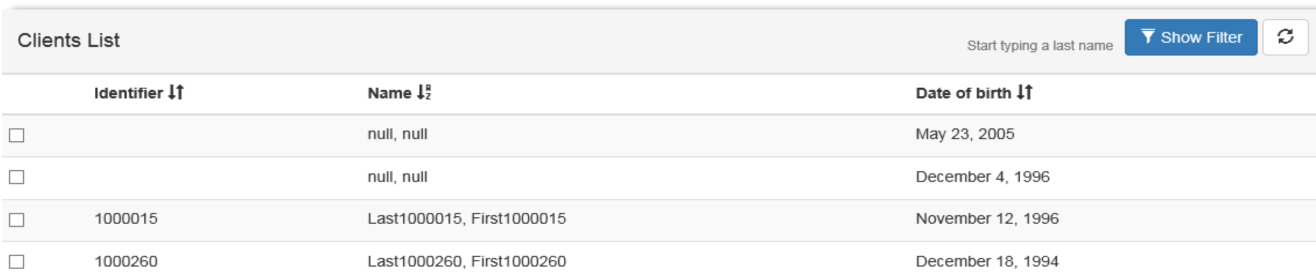
The Data Portal Toolbar



- ✓ **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.



	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 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
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

By default, this list is sorted by Date, from most recent to oldest. The assessments may be sorted by ID number, the instrument, name, date, and status.

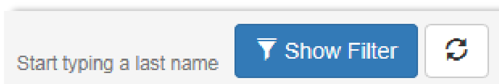
In addition to sorting the Clients and Assessments Lists, you can filter the lists if you know specific information about the client. How to filter lists is covered below.

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 begin typing a last name the list will automatically narrow to include clients with only the last name you typed.**

   Or you can:

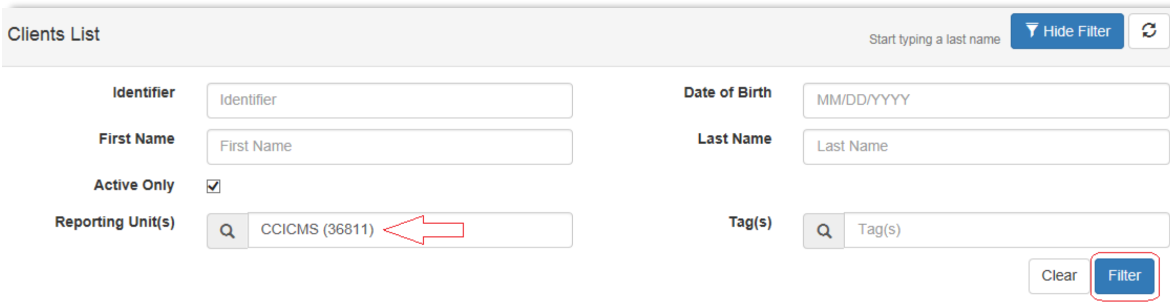
4. **Click the blue Show Filter button at the top right of the screen.**

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. The plus/minus icons allow you to expand or collapse the list of RUs. 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).**

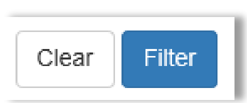


Additional key information about the filter function:

- ✓ 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.



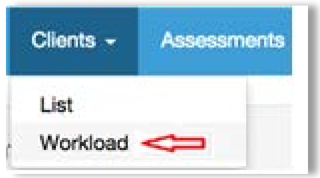
- ✓ The refresh button in the upper right corner (immediately right of the Hide Filter button) adds to your list any new data that may have uploaded to the system since your last search with similar parameters.

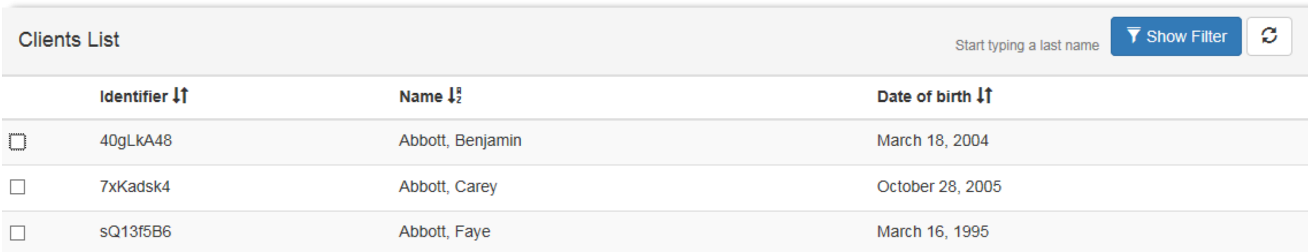
- ✓ For the identifier, first name, and last name search boxes, entries do not need to be complete ID numbers or words. For example, a search can run using only the first three numbers in a client ID (e.g., "012") to yield a list of clients with the numbers "012" somewhere in the client ID.

Viewing and Adding a Client to Workload

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





2. **To add a client to your workload, navigate to the Client List.**

3. **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.**

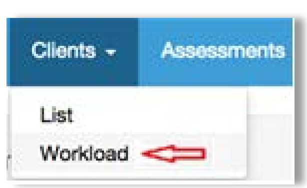
Removing a Client from Workload

<u>When the case is closed in Simon, it will be automatically removed from your OA 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.**



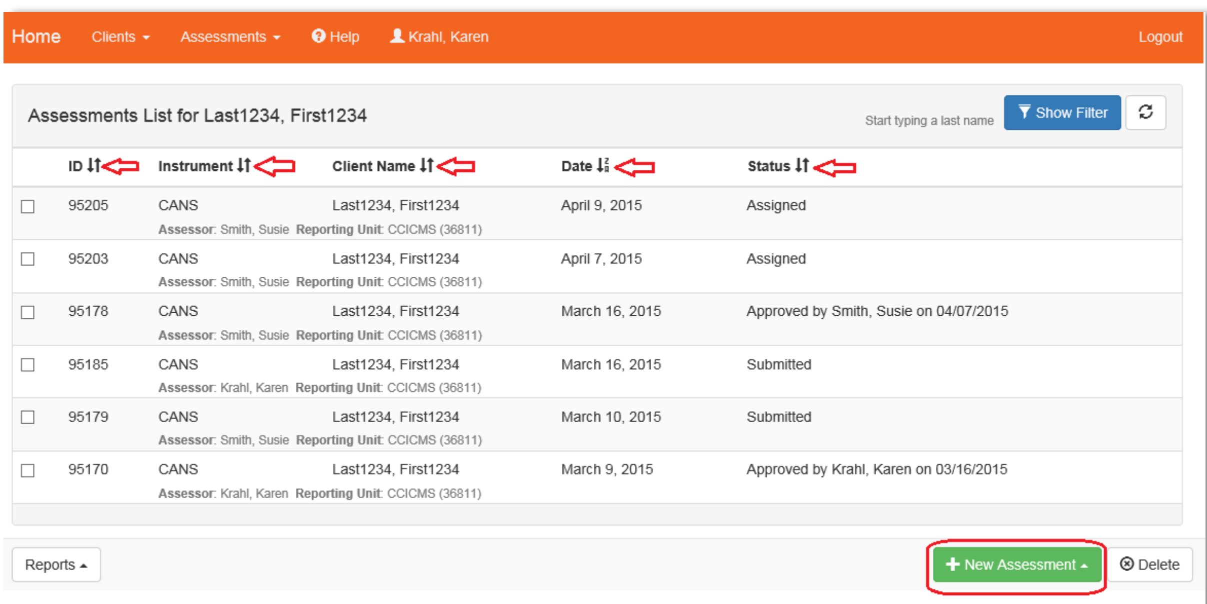
4. **Check the boxes next to the identifier of the client you are removing and then click the red Remove from Workload button at the bottom right of your screen.**

Assessments

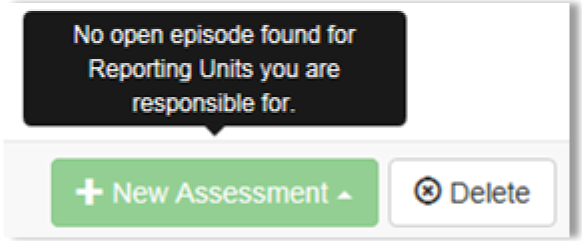
Adding an Assessment

1. **From the Home screen, click Data Portal.**

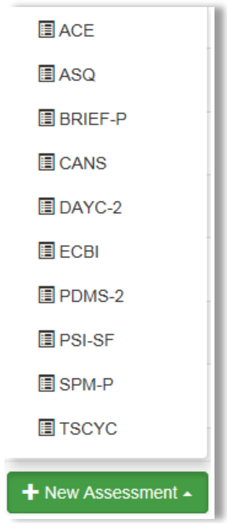
2. **Click on the client name for which you would like to create a new assessment. Or filter for the client and then click on the client's name.**
   - You will navigate to the client's Assessments screen. This screen may contain assessment information for the client, if there are assessments in OA for the client (see below). If there are no assessments in OA for the client, it will return "No data found!". The assessments may be sorted by ID number, the instrument, name, date, and status.



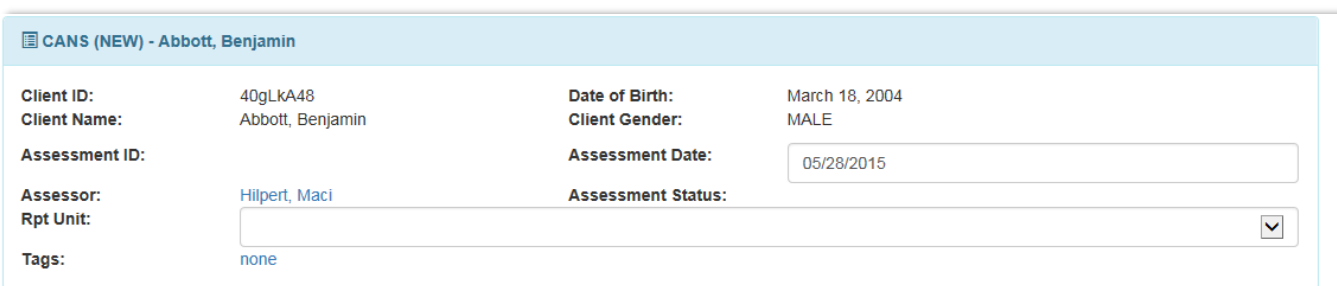
3. **Once on the assessments list, click the green New Assessment button at the bottom right of the screen.**
   - The New Assessment button will not be available for use if the client is not active to the RU(s) assigned to you in OA. If you hover over the New Assessment button, you will receive the 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.



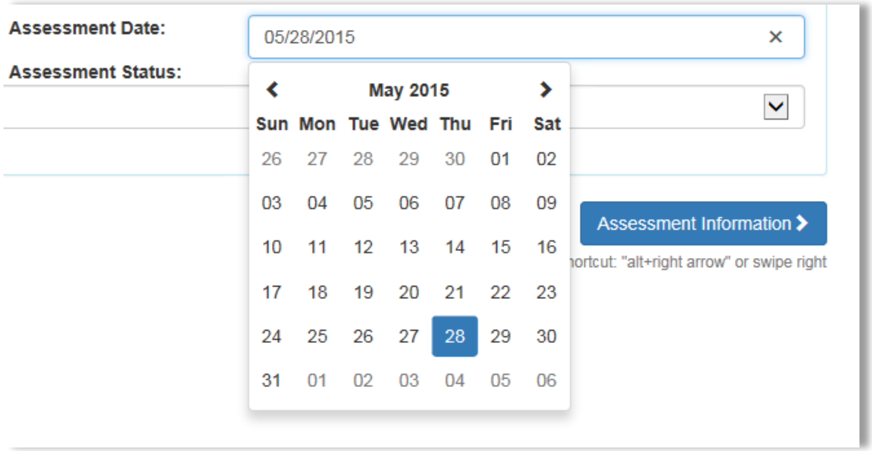
After selecting CANS, you will navigate to the first page of the CANS (New) entry screen. Key information about the client will display. This includes the client's ID number, name, date of birth, and gender.



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

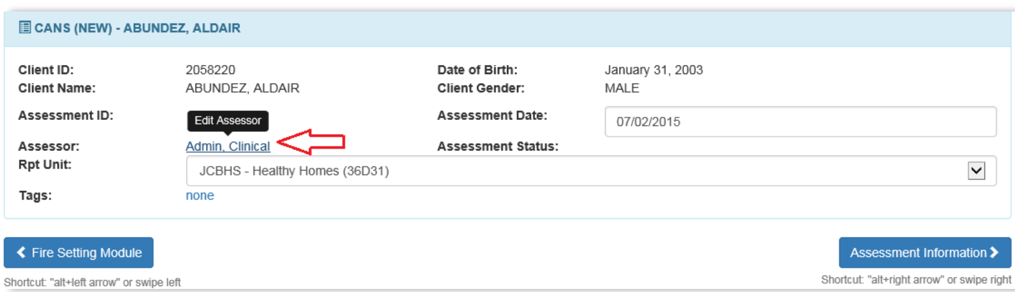
Assessment ID: The Assessment ID will auto-generate after the assessment is complete and has been saved.
Assessment Date: The assessment date is the date that the assessment was performed, not the date that it is entered. This field defaults to the current date. If the current day's date is not the date 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.**



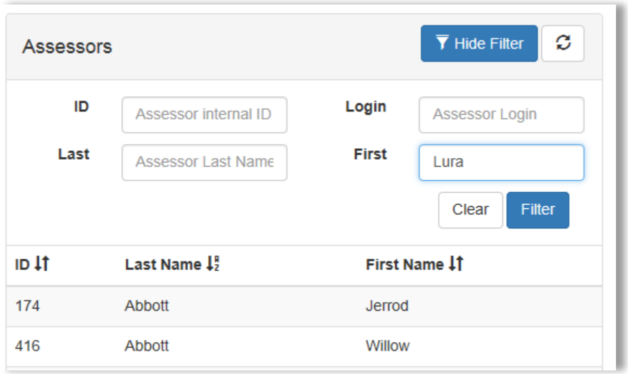
Assessor: If the person entering the assessment information into OA is not the assessor who completed the assessment with the client, the Assessor field will need to be edited.

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

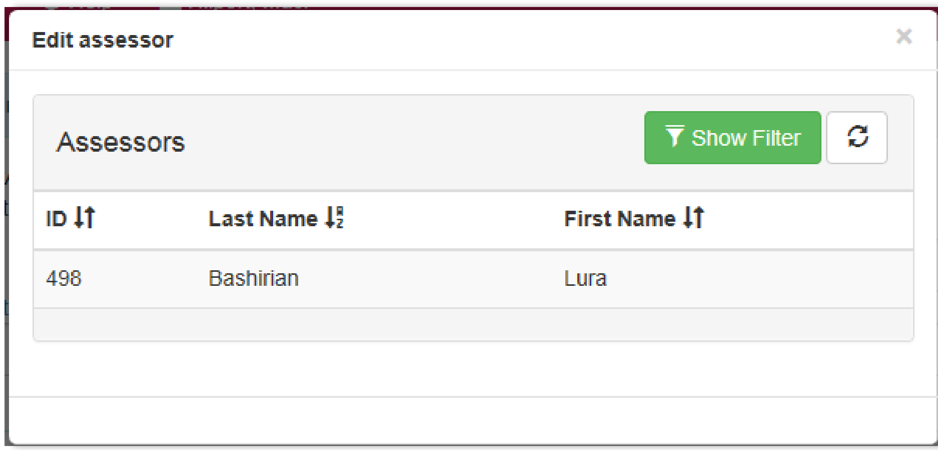


2. **If the list of assessors shown is long, you can filter for the assessor by clicking Show Filter and filtering by the available options. Otherwise, skip to step 4.**

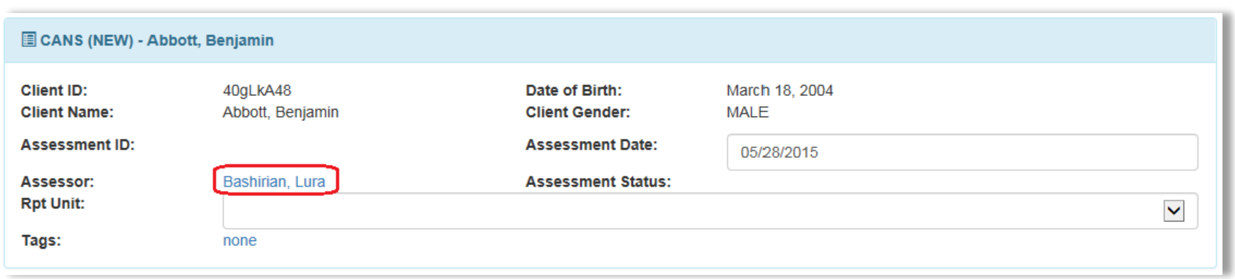
3. **The list can be filtered by one or more fields of information about the assessor. Enter your filter selection(s), then click Filter.**



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

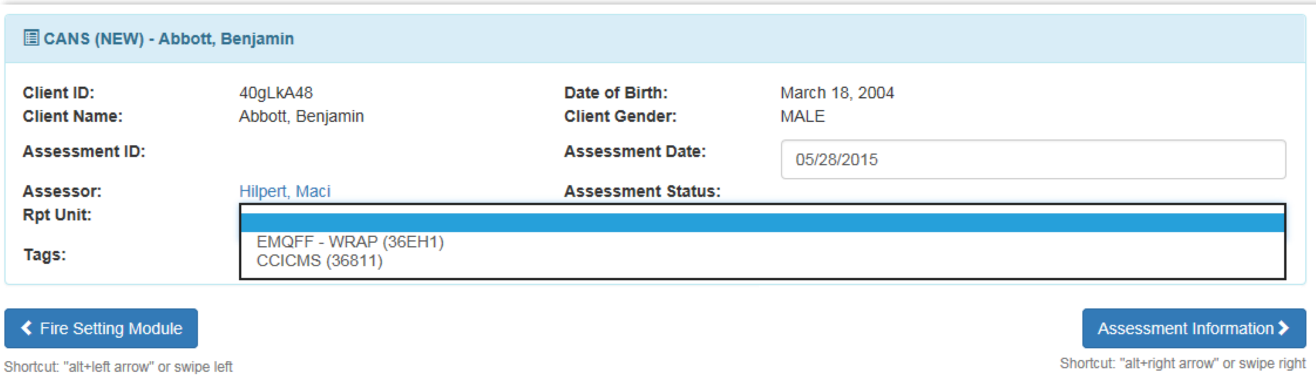


Note the change in the assessor name:



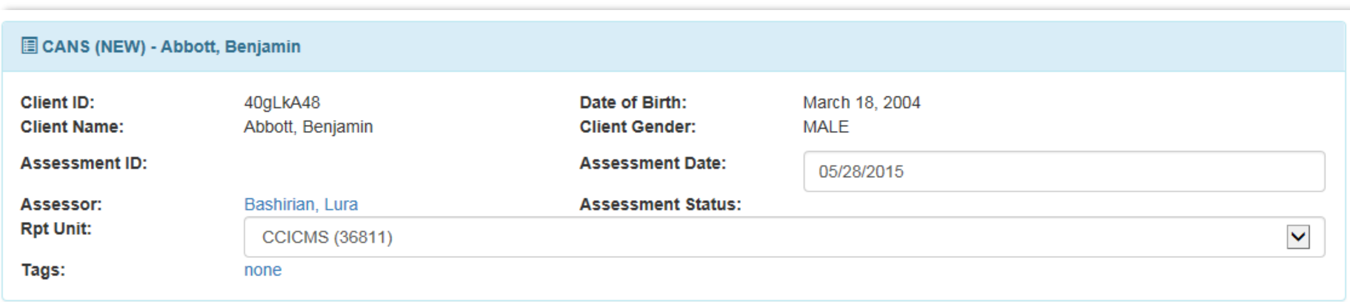
Rpt Unit: The Reporting Unit will pre-fill if the client is placed and open to only one RU. If the client is placed and open to two or more RUs the Rpt Unit field will be blank. If this field is blank, the correct RU must be selected.

1. **Click in the empty Rpt Unit field.**



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

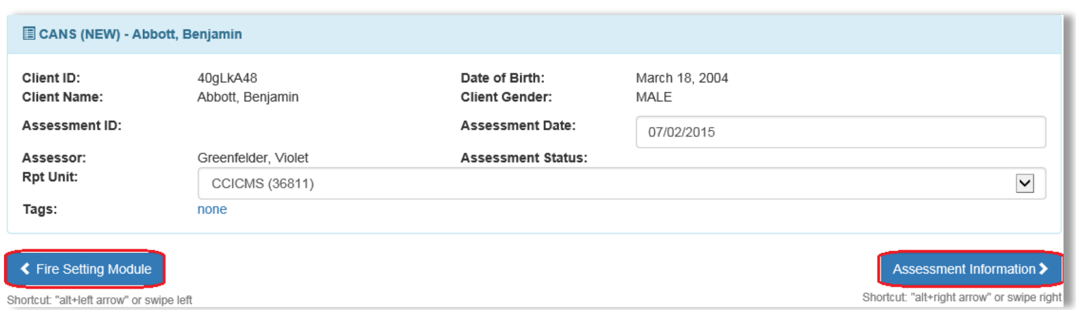
2. **Select the correct RU.**



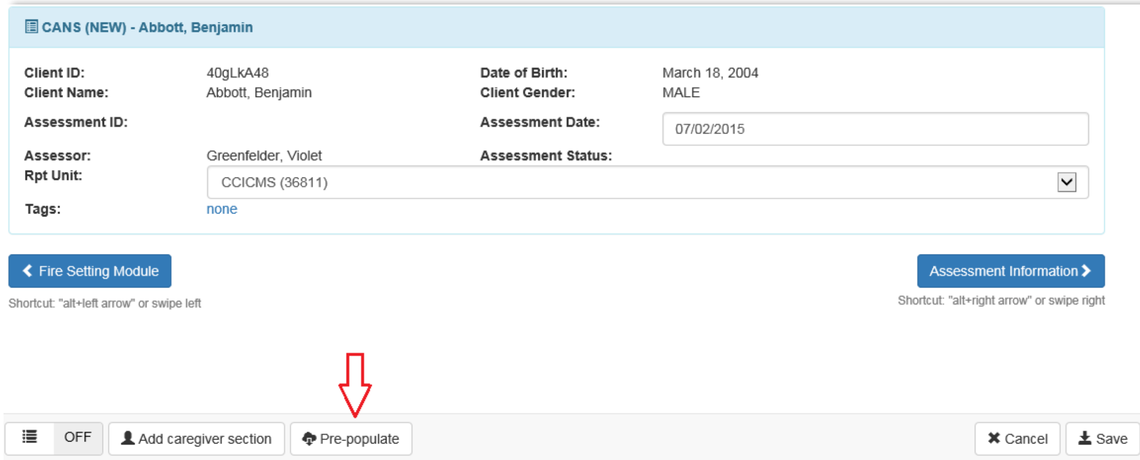
Assessment Data Entry

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

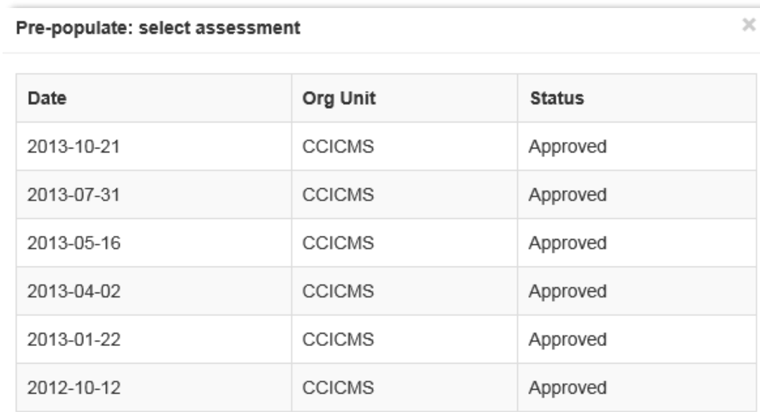
1. **To navigate through the assessment, click on the blue routing buttons with white arrows in the direction you wish to go.**
   - You can also navigate left or right by simultaneously holding down the alt and right/left arrow key on the keyboard.



2. **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.**



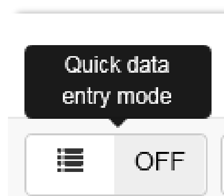
- If there are approved assessments in OA for this client, a list of assessments will appear from which you can choose to prepopulate your assessment. Note: the approved assessments listed for the client may not be assessments completed by you or for your program. If this is the case, you can dismiss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



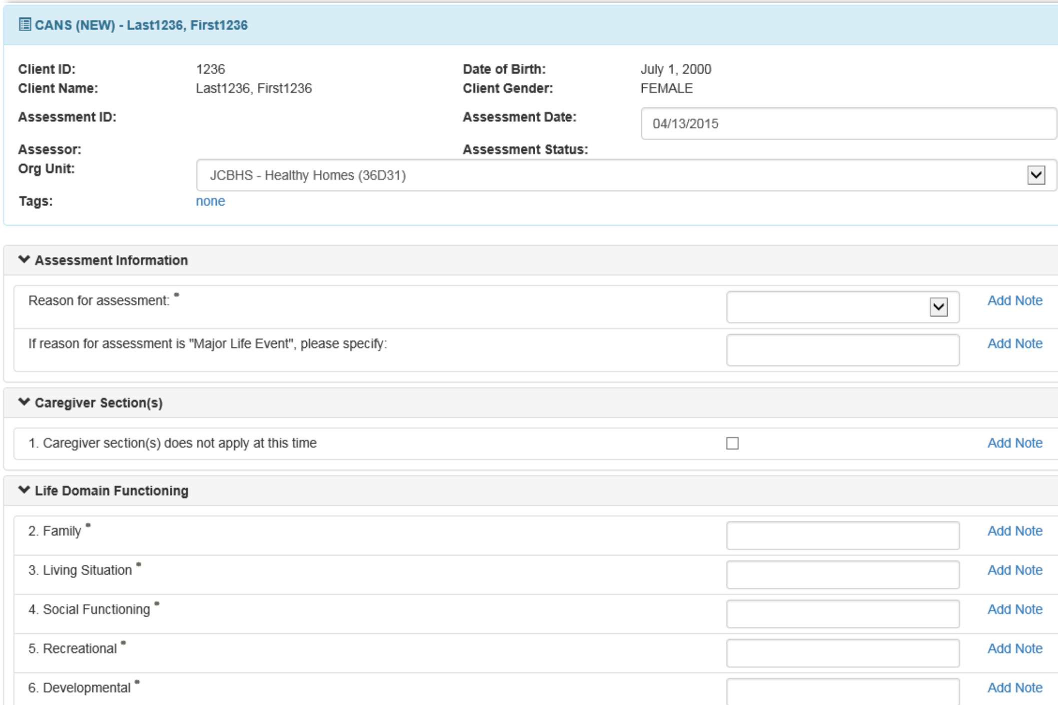
Pre-populate: select assessment

Date	Org Unit	Status
2013-10-21	CCICMS	Approved
2013-07-31	CCICMS	Approved
2013-05-16	CCICMS	Approved
2013-04-02	CCICMS	Approved
2013-01-22	CCICMS	Approved
2012-10-12	CCICMS	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:

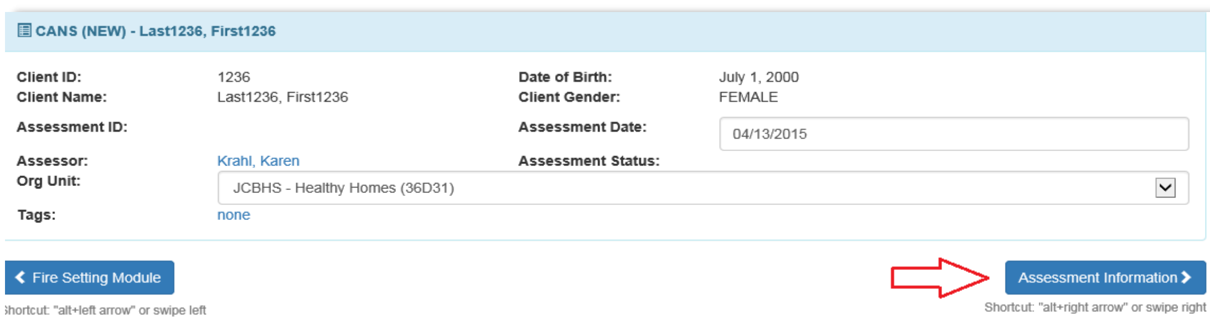


If you choose to utilize “Quick data entry mode”, a screen will appear where each field can be seen on the same page. In this mode, you will scroll down the page to complete the assessment fields, instead of navigating through separate screens. Completing the assessment in “Quick data entry mode” will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

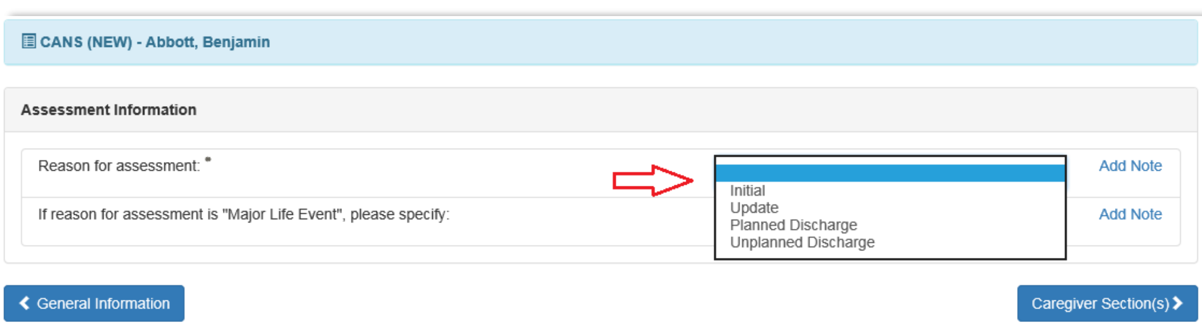


4. **Turn off the "Quick data entry mode" by clicking the same button, which will now look like this:**

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



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

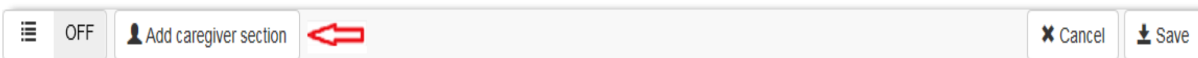


7. **Click Caregiver Section(s). This section states, "The Caregiver Section(s) does not apply at this time".**

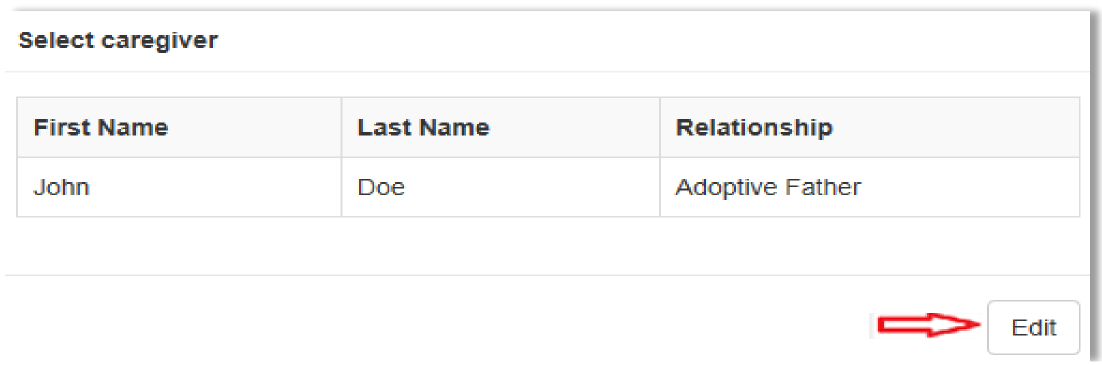
- If you will be **completing caregiver information** for the assessment, leave this box **unchecked**.

- 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.

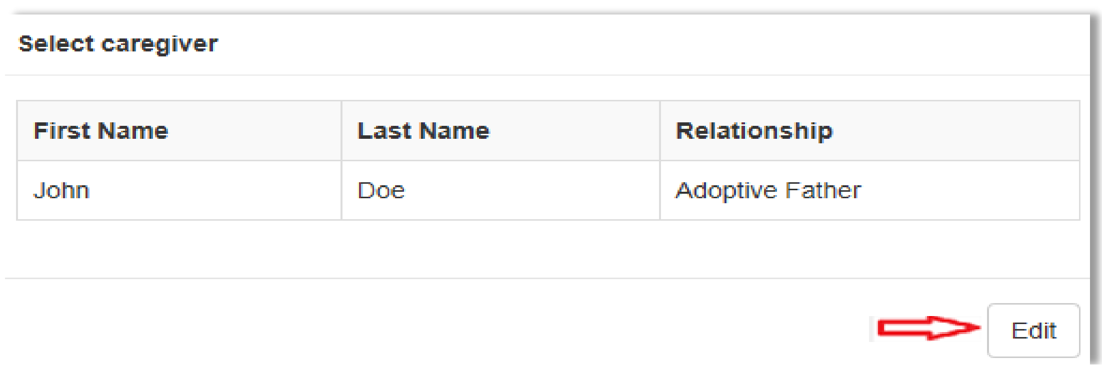
8. **Add caregiver information by clicking the "Add caregiver section" button on the bottom toolbar.** Note: You can add this information at any time during the completion of the assessment.



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

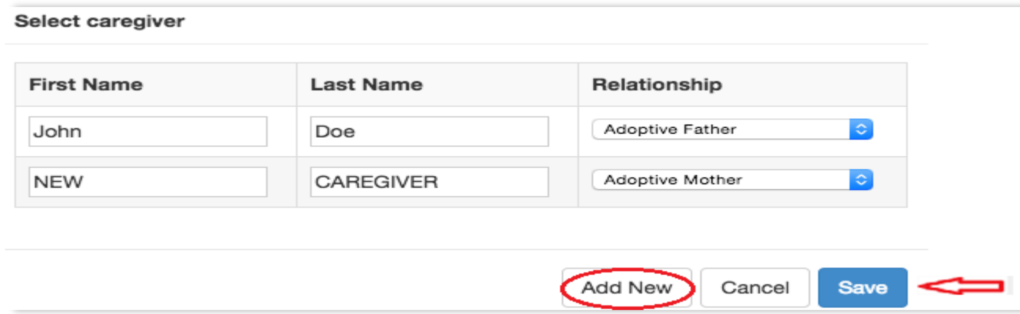


9. **Press the Edit button at the bottom right, to add a new caregiver.**



10. **Add a new caregiver to the current list by selecting the Add New option.**

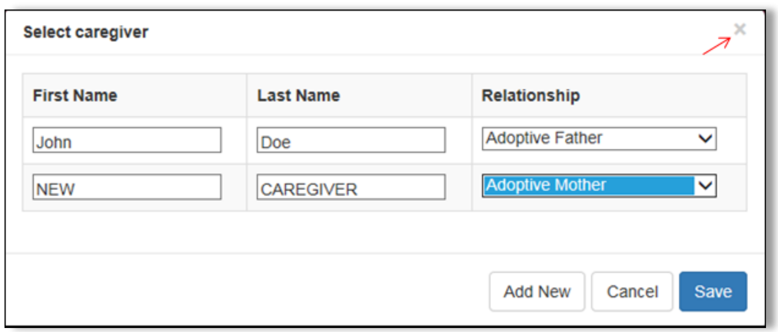
- If you select Add New, a new row will appear, allowing you to enter the First Name, Last Name, and Relationship of the caregiver (as shown below).



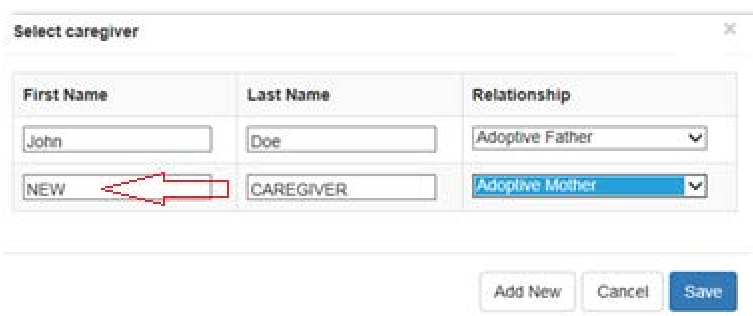
11. Multiple caregivers can be added. The Save button must be clicked after each caregiver entry before a new caregiver can be added.

- 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.

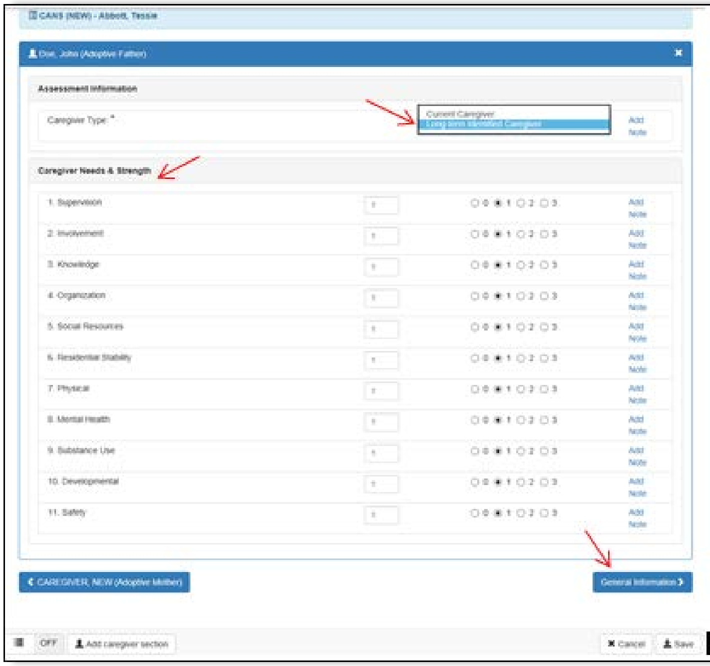


13. Otherwise, once all caregivers have been added and saved, click the row of the caregiver you want to enter assessment scores.



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

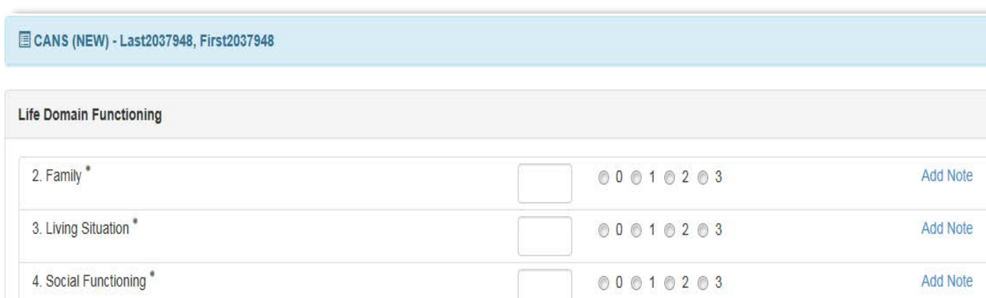
- Select the Caregiver Type from the drop down list.
- Complete the eleven (11) Caregiver Needs & Strength questions.



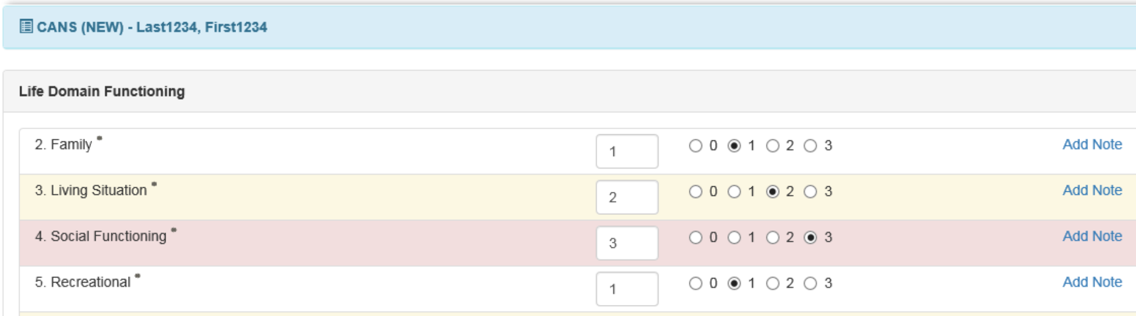
15. **To add another caregiver, repeat the steps 13 and 14 above until you have added information for all of your caregivers.**

16. **Click the blue Life Domain Functioning button.**

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

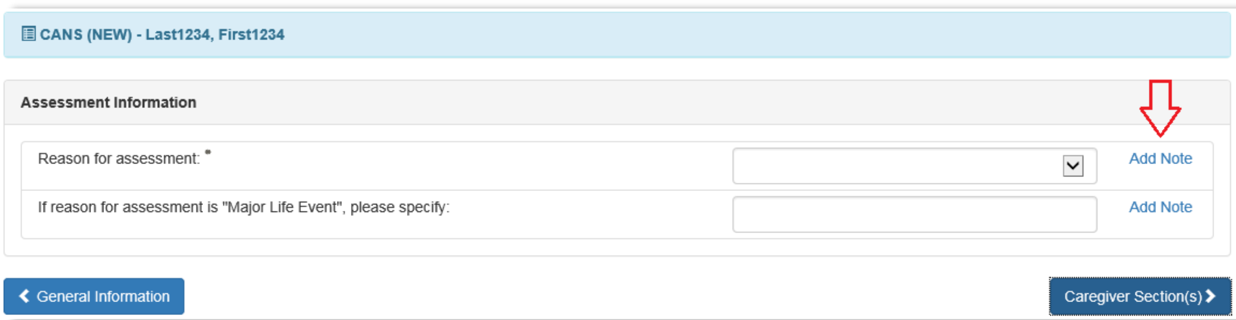


There are two options for entering the data:
✓ You can enter numbers 0,1,2,3 in the empty boxes from your keyboard. Press the tab key on your keyboard to move to the next box to be filled.
✓ You can select one of the bubbles from the existing options of 0,1,2,3 for each category with the click of the 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).

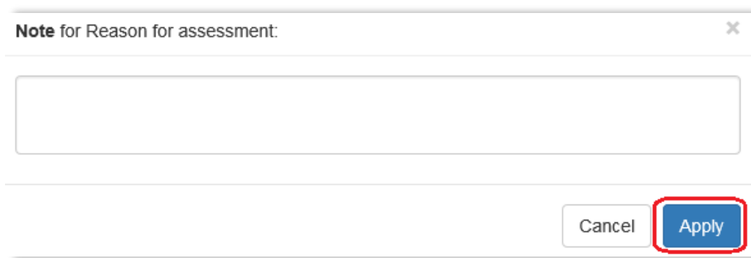


17. **Continue through the assessment completing all required sections and modules by pressing the blue routing buttons.**

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

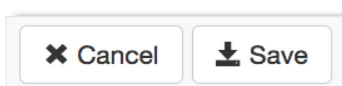


19. **A text box will open. Enter your note.**

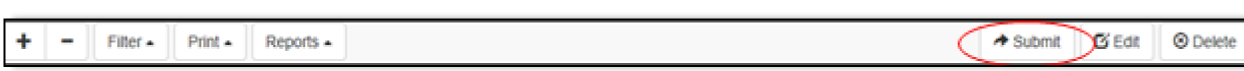


20. **Click Apply.**

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

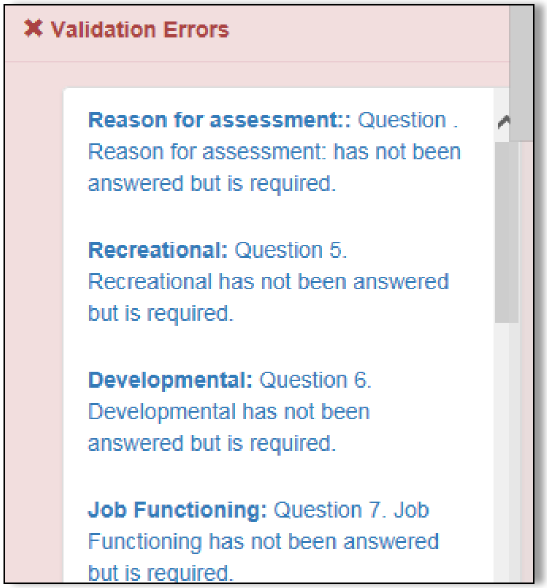


22. **Once you are satisfied that your assessment is complete, click Submit to send the assessment to your supervisor for approval.**

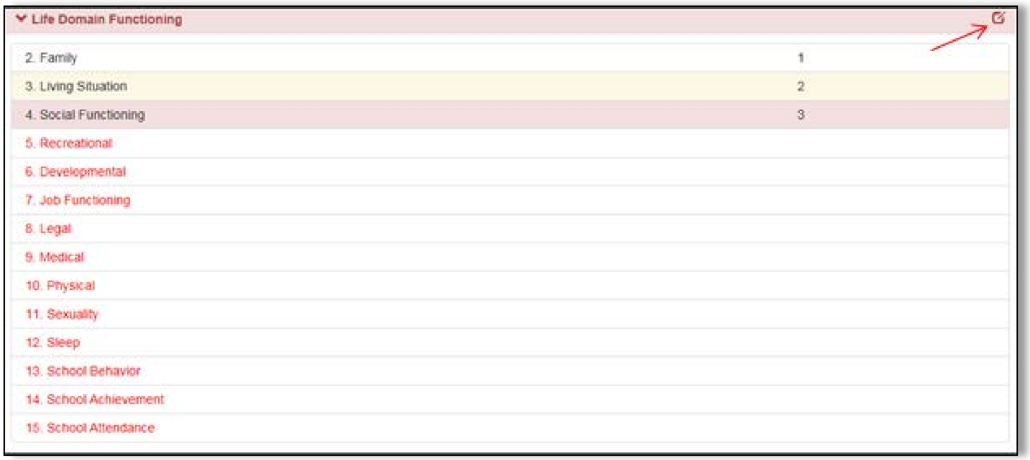


Validation Errors

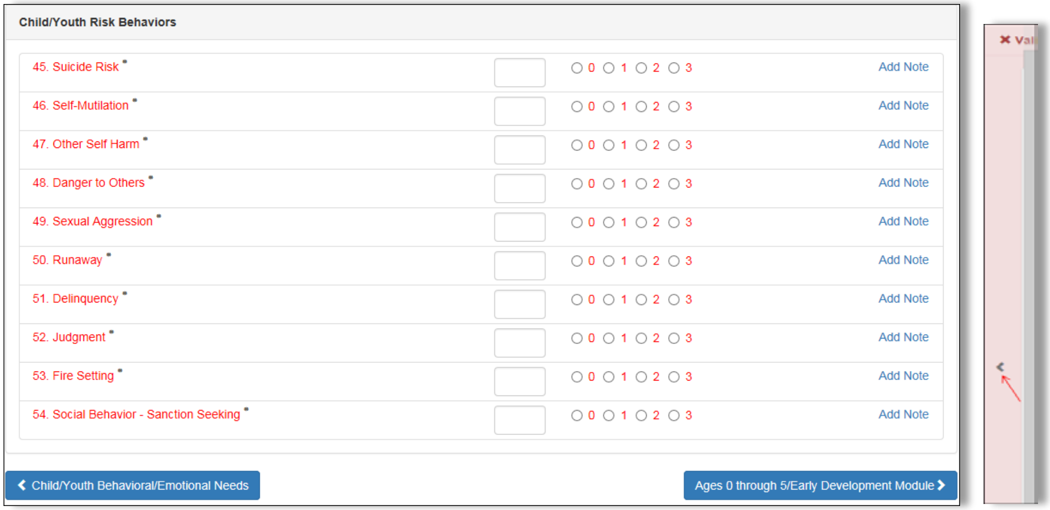
1. **Assessments submitted with missing required information will receive a validation error dialogue box.**
   - This is designed to ensure that all parts of the assessment have been completed before submission.
   - The box, entitled Validation Errors, will list all of the items in the CANS-SB (giving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



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.

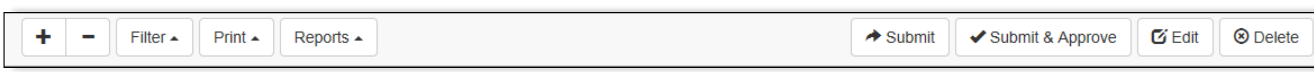


- Enter all missing scores and then click Save.

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

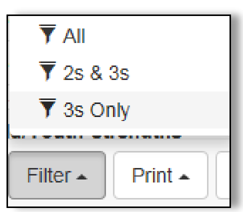
Assessment Toolbar

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.

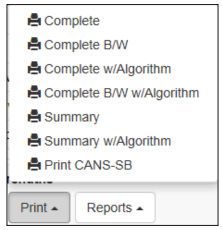


✓ **+/- Icons:** the plus/minus icons on the far left of the bar allow you to expand or collapse the domains and modules in the assessment. Selecting the plus will show each individual domain/module items. Selecting the minus will only show the domain and module headings.

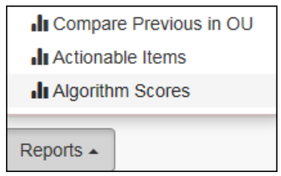
✓ **Filter:** allows you to filter by assessment scores. For example, you can filter to see assessment scores of "2s & 3s" or for "3s only".



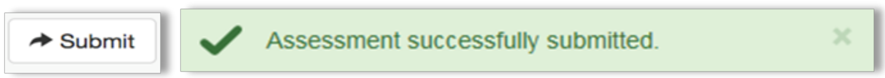
✓ **Print:** The print options (shown below) allow you to print the assessment in various forms. You can print a complete version that is color-coded or black and white that looks like the version shown after an assessment has been saved in OA. The Summary print version is a shortened assessment report that shows only the domain and module names color coded to the 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.



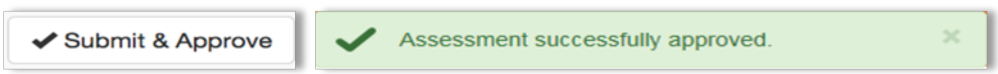
✓ **Reports:** The reports tab shows 3 different reports based on the assessment data; however, currently the report Algorithm Scores, is not available. The Actionable Items report shows only those items scores of a 2 or 3. The Compare Previous in OU report is a report that compares the current assessment 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.

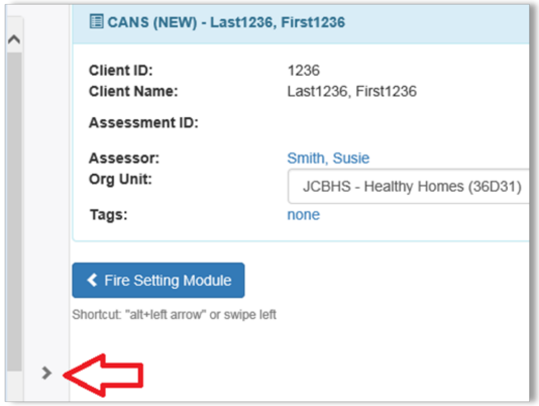


✓ **Edit:** the Edit option allows you to change information in the assessment.

✓ **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.

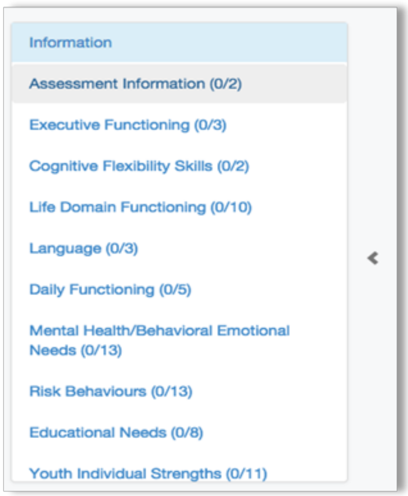
Side Panel

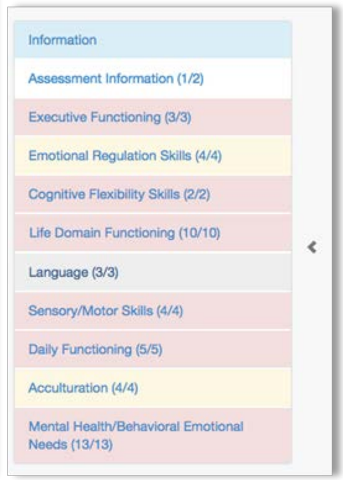
When in an assessment, to the left side of the screen you will see a bar with an arrow.



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.





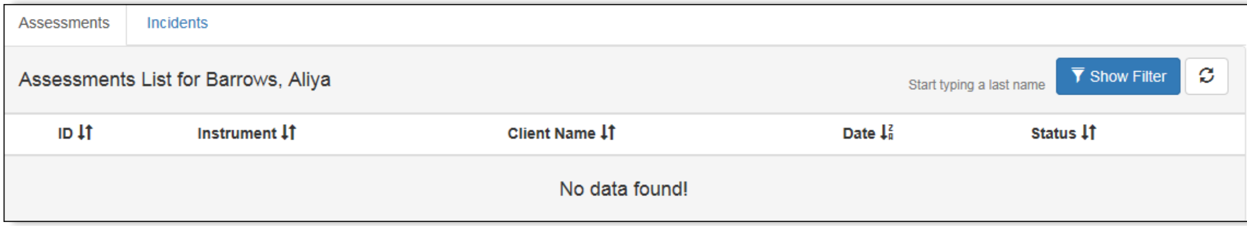
This example is of the panel once assessment scores have been entered.

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.**

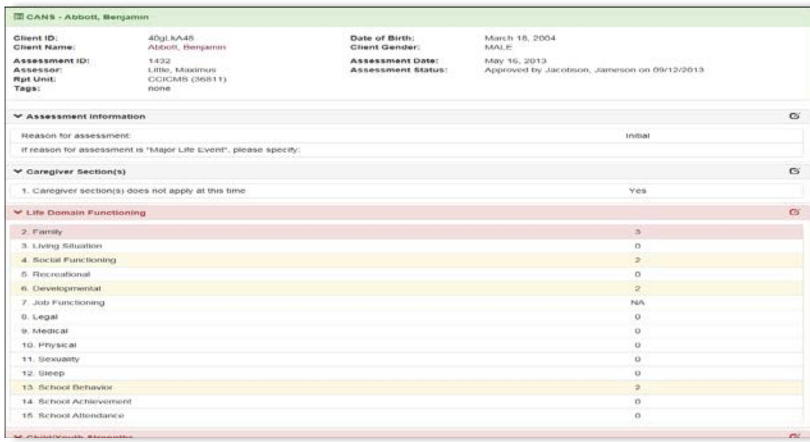
   - After selecting a client you will navigate to that client's Assessments screen. If the client has assessments entered into OA for him/her, there will be a list of those assessments. **Note:** when a client is open to your program RU, you are allowed to see all of the client's assessments, even those 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).



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

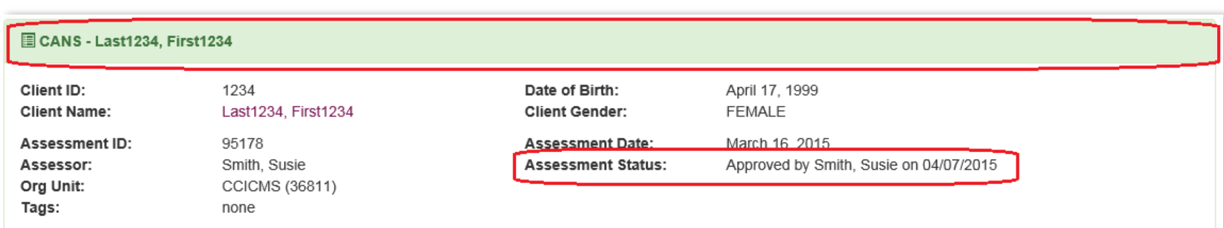
3. Once the correct assessment is located, click the row where the assessment information appears.

- The assessment will open in the following format:



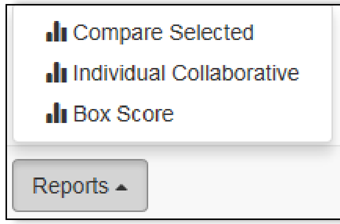
- Depending upon the status the assessment is in (assigned, submitted or approved) and your permission levels, from this screen, you may be able to review, edit, submit, print, submit or delete the assessment. You can also access the other functions on the toolbar along the bottom of your screen.

- 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.



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.



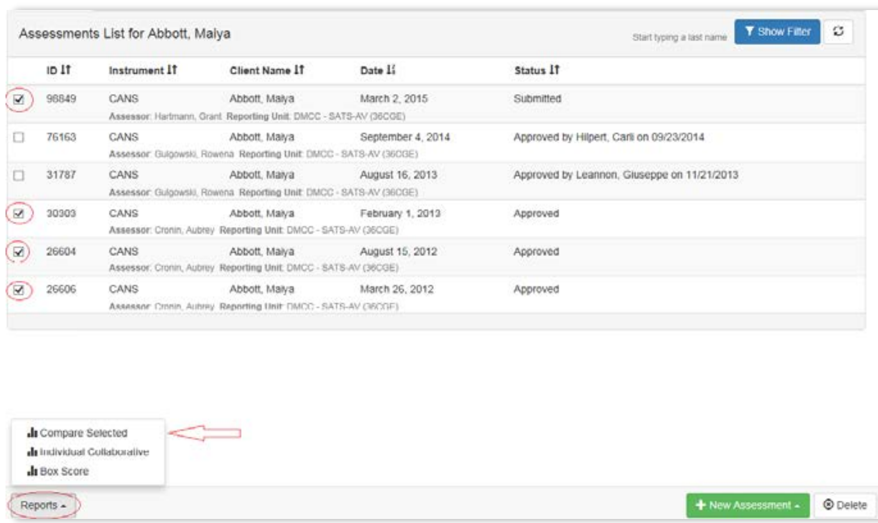
1. **Navigate to a client's Assessments List** (as instructed above)**.**

2. **Select the report button on the bottom left of your screen to reveal the menu of report options.**

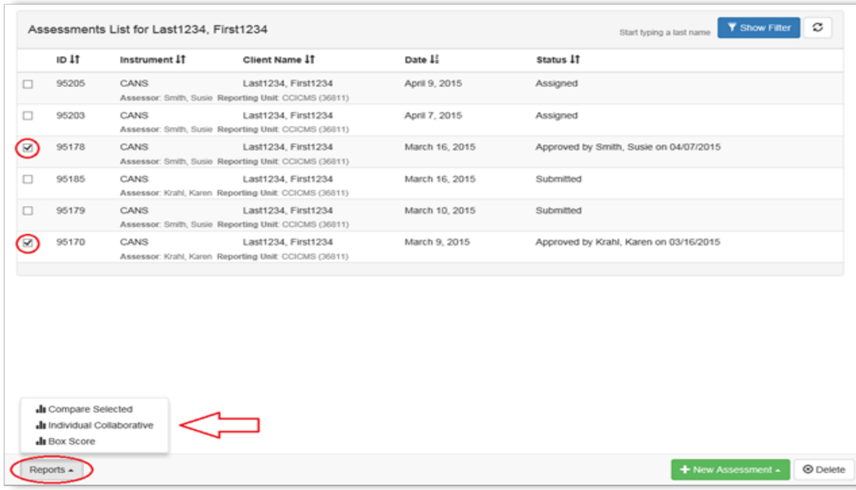
3. **Click the name of the desired report.**

- The report will open in a new window in your browser.

4. **For the <u>Compare Selected</u> 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.**



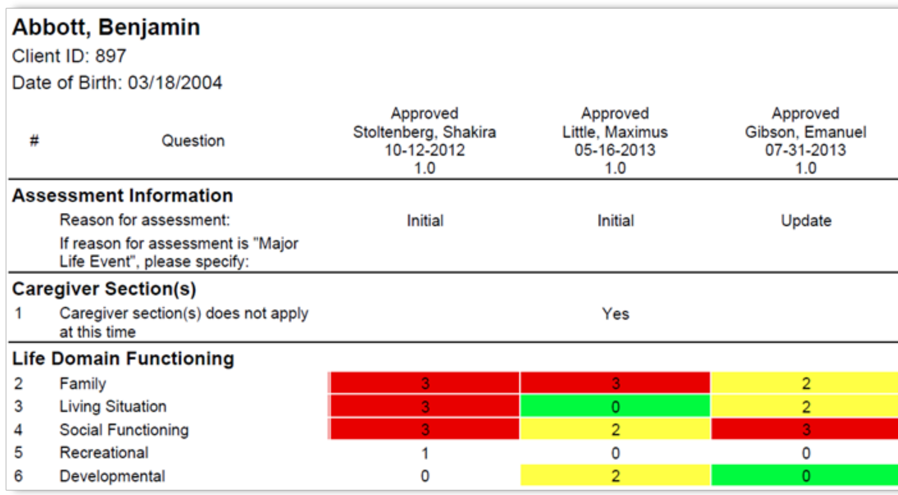
5. **For the <u>Individual Collaborative</u> report, select only two assessments you would like a report for by clicking the checkbox to the left of each row.**



- Note: At least two assessments must be selected for the reports to generate.

Sample Reports

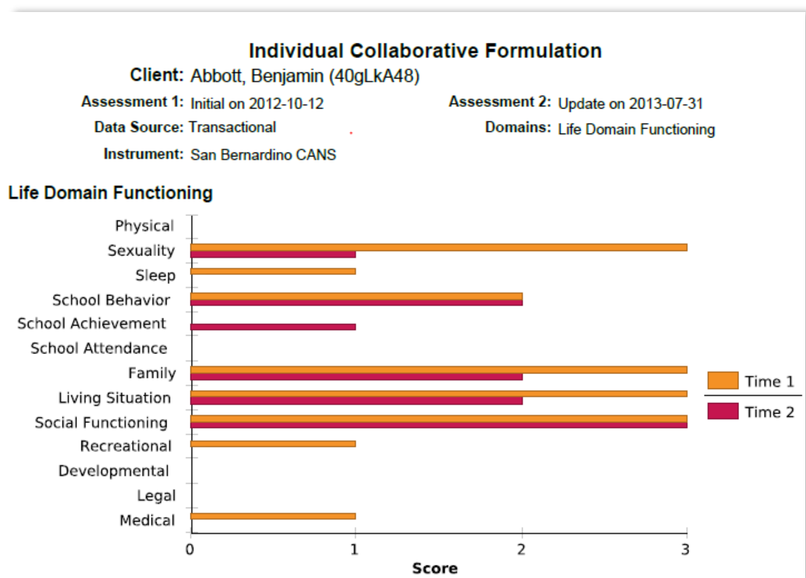
This Compare Selected report is a compares side by side comparison of selected assessments to show client score changes over time.



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
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 a comparison of time one and time two (e.g. Initial versus Update) assessment scores.

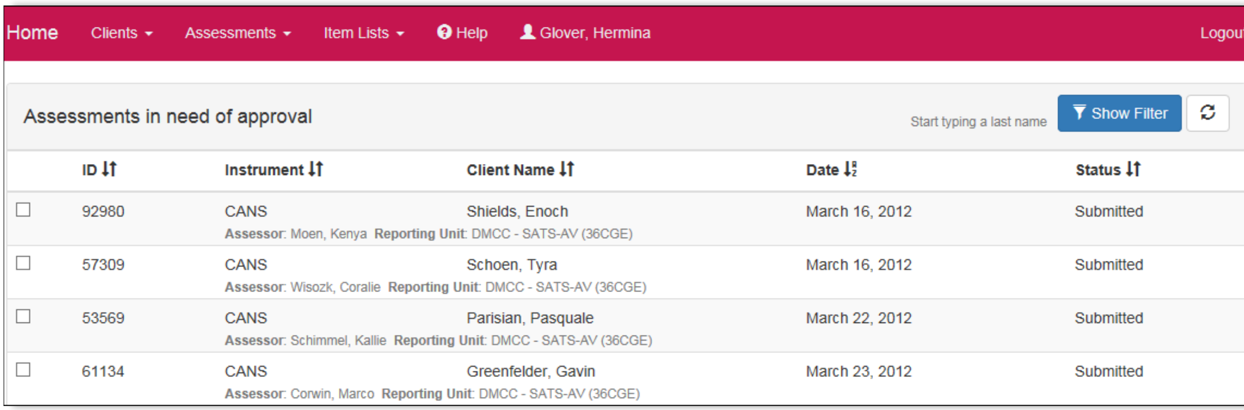


Assessment Approval (A task for Supervisors and Clinical Administrators Only)

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

2. **A list of submitted Assessments will display.**

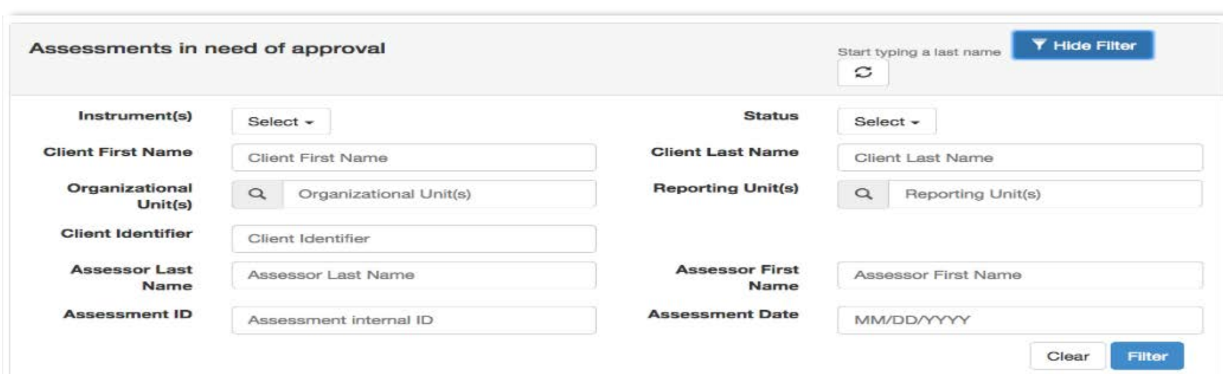
- This list is sortable by ID number, instrument, client name, date, or status of assessment.



3. **There are three ways you can choose to approve assessments from this screen. One way is to open the assessment by clicking on the assessment row, then 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.**

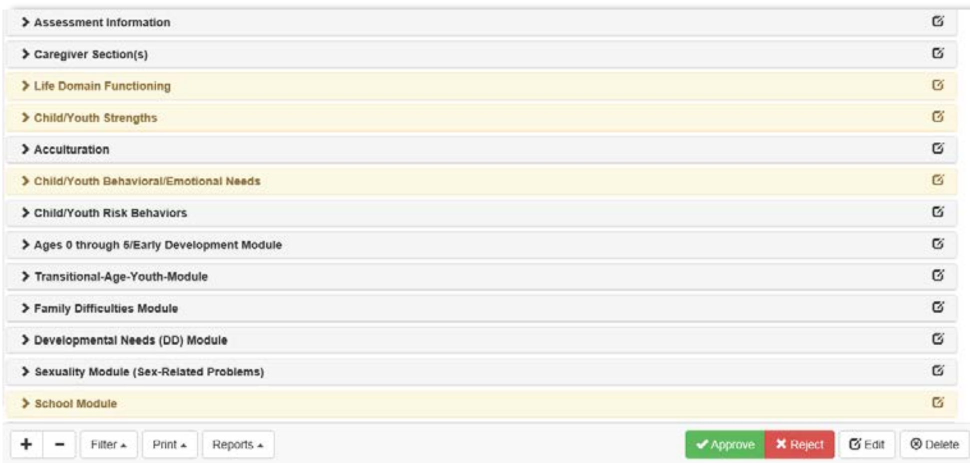


- The Sequential and Batch Approve options are similar approval processes, but offer slightly different assessment form views. Both can be accessed via the toolbar at the bottom, right of the screen.

Sequential Approve

1. 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.

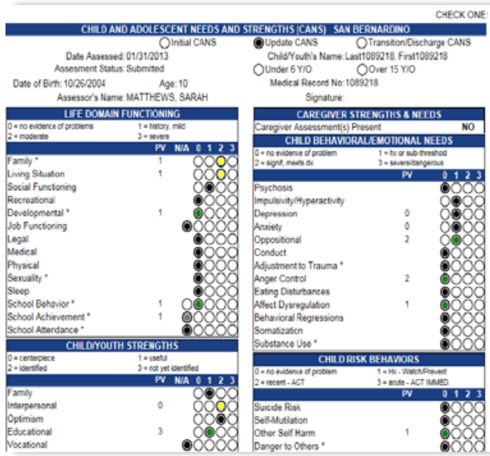
Batch Approve

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.

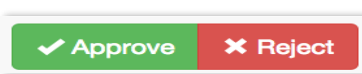


- You will be able to approve/reject the assessment and move to the next assessment automatically, much like in Sequential Approval.

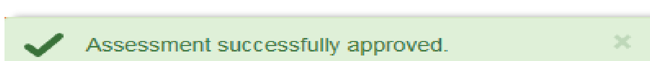
Assessments

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.**



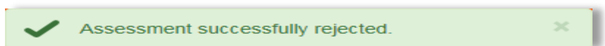
- In Batch Approval mode, you are NOT able to edit the assessment before approving. If the assessments must be edited, you will need to exit Batch Approval mode.
- After you approve the assessment, you will see a green confirmation box near the top right that says “Assessment successfully approved”.



- 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.

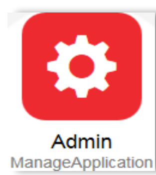
3. **Once you have entered your reason, click reject to confirm the rejection. If necessary, click the "x" at the top right to cancel the Reject Note process. You cannot reject an assessment without submitting a reject note.**

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



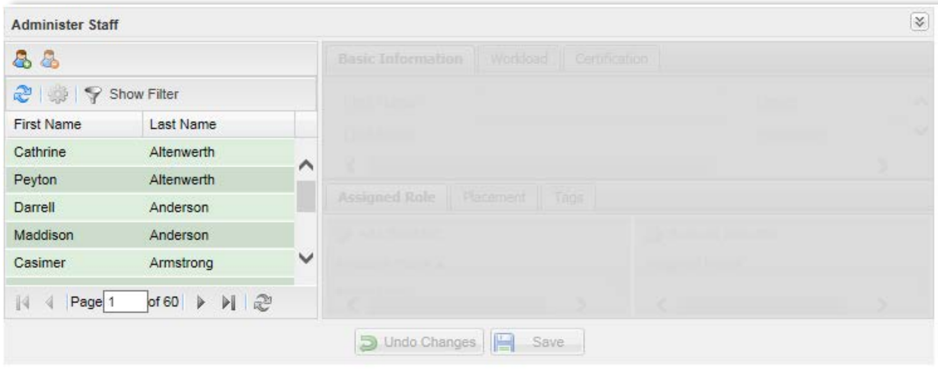
Administration

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



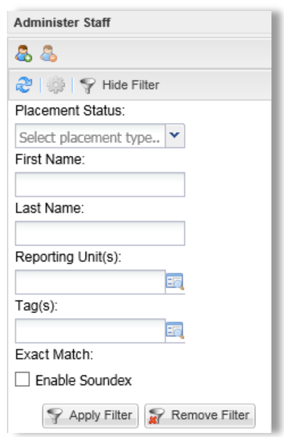
   - Depending on your browser settings, you may see "Only secure content is displayed", along the bottom of the screen. If so, and you are working on a private computer (not used by the general public), click "Show all content".

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



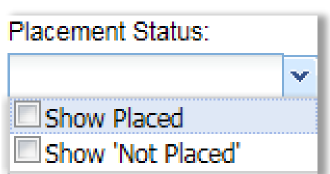
Filtering the Staff List

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.

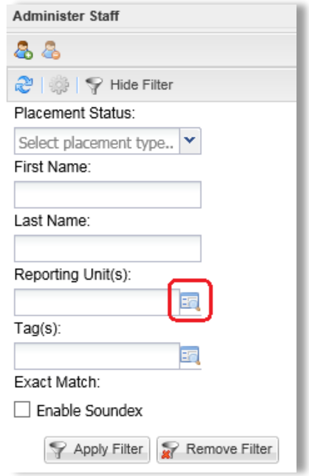
2. **If you only want to see the staff that has a placement, check Show Placed.**
3. **If you only want to see staff that is not placed, check Show ‘Not Placed’.**
4. **If you want to show all Staff, whether placed or not, click both boxes.**



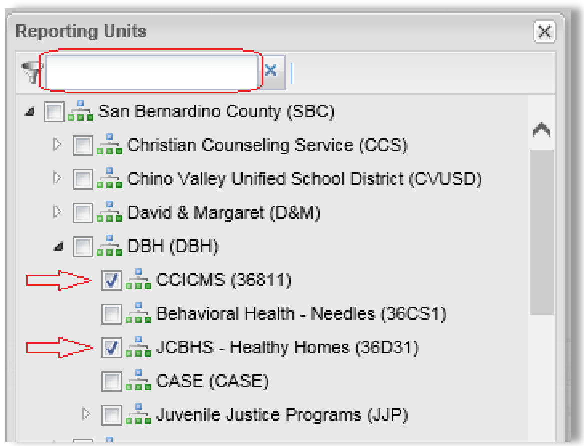
✓ **First Name:** to filter by first name of the staff member.
✓ **Last Name:** to filter by last name of the staff member.
✓ **Reporting Units:** to filter by a specific (or multiple) reporting unit(s).
✓ **Tags:** to filter by specific tags that have been assigned to the staff member. (Not active at 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.**



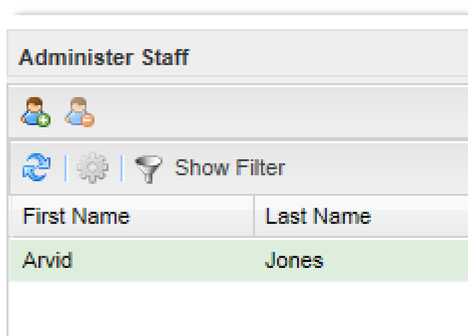
6. **From here, type the RU that you are looking for in the blank field or find it manually by expanding the arrows and clicking the appropriate check box(es).**



7. **Click OK to return to the Filter.**

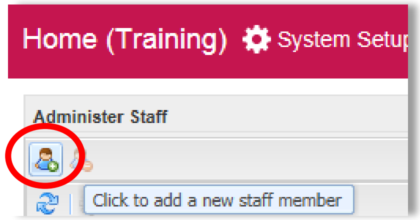
8. **Click Apply Filter or press Enter on your keyboard.**

   - The filter will then return your results.

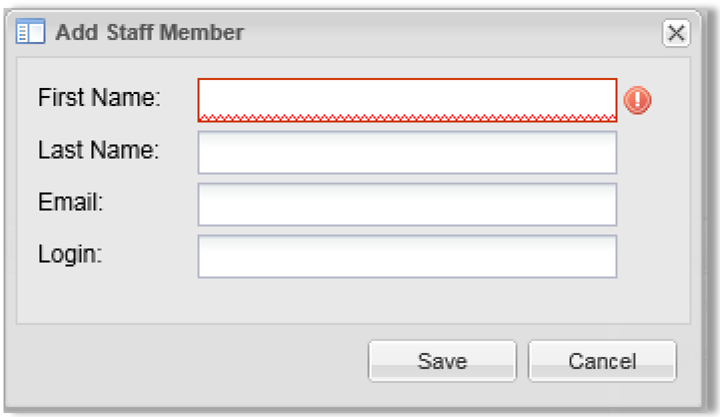


Adding a New Staff Member

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

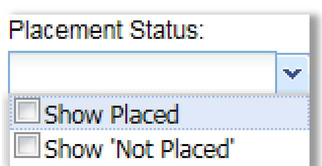


- A box will open to enter the staff member's information.
- Enter the staff member's profile information, all fields are required.
- The Login will be the staff member's SIMON number.
- Click Save.



2. **Click Show Filter to filter for the new staff member.**
3. **Under Placement Status, select Show Placed and Show 'Not Placed'.**

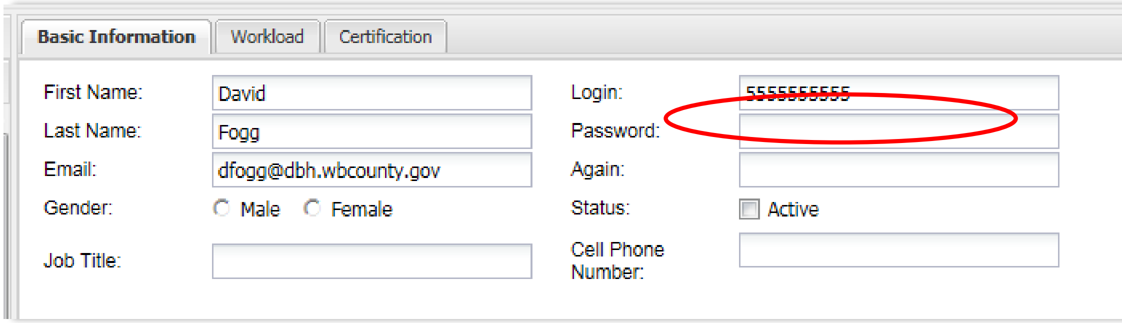
- Because the account has not yet been assigned to an RU, you must select Show 'Not Placed' in order to be able to see the staff member you just created. However, you want to also select Show Placed so that you will be able to see the staff member once you have "Placed" them (assigned them to an RU).

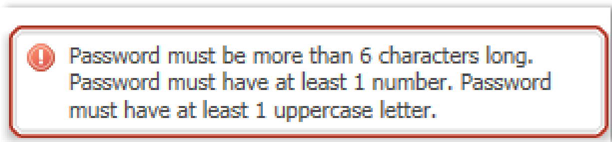


4. **Enter any further filter criteria you wish (e.g. First name, etc.), then click Apply Filter**

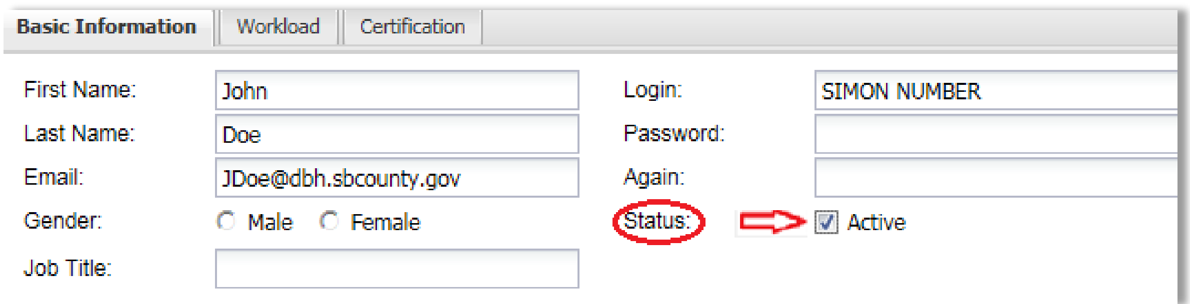
5. **Double click the name of the staff member to pull up the staff profile.**

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





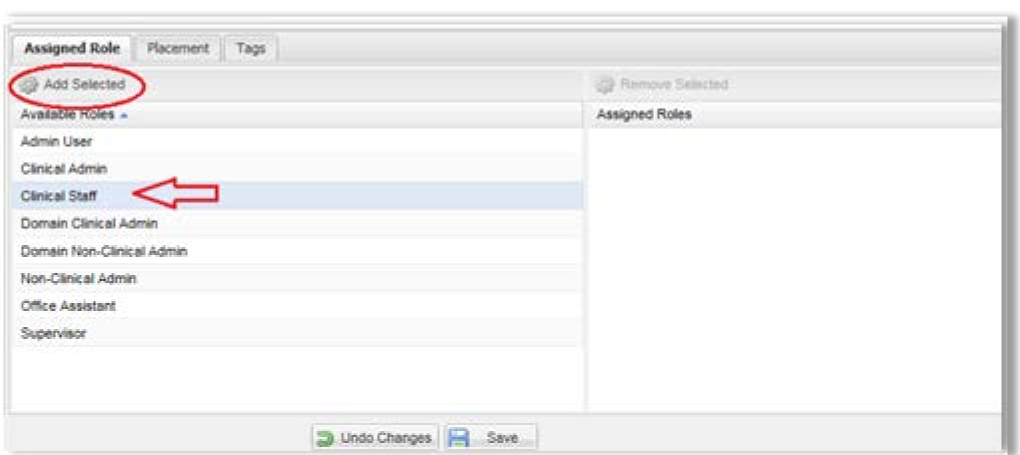
7. **Activate the profile by checking the Active box.** If you want to deactivate a user, you would uncheck this box.



Assign/Remove Role

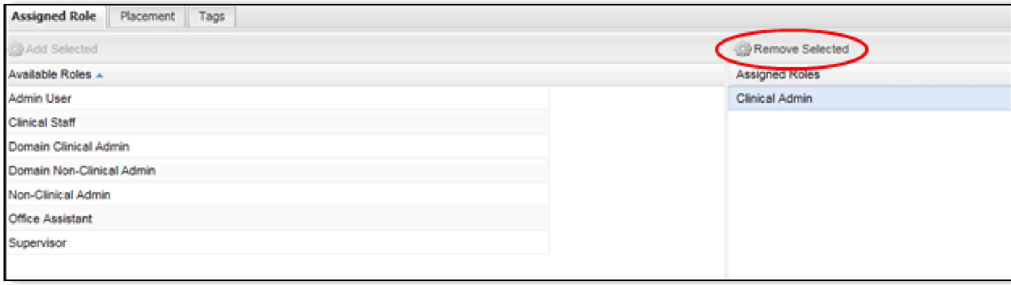
Note: You cannot assign a role with permissions greater than your own. Assign only one role per staff member.

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



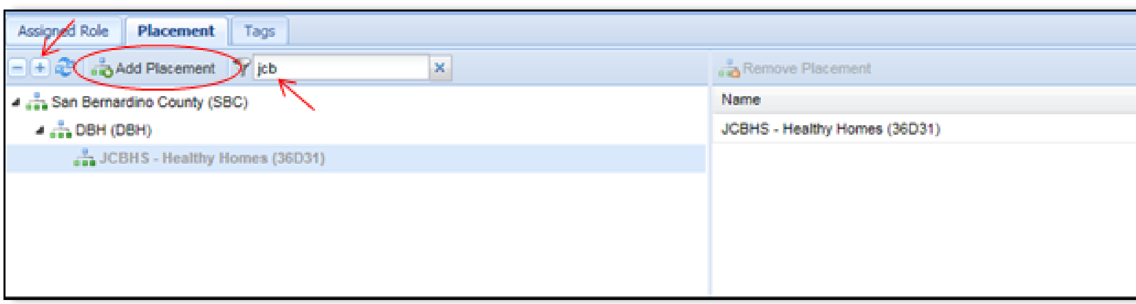
2. **Click Add Selected. The role will appear in the Assigned Roles pane on the right.**

3. **To remove a role, click on the item in the Assigned Roles pane, and then click Remove Selected.**

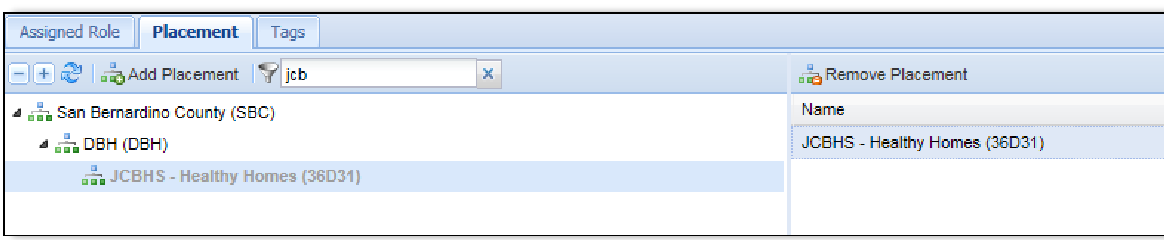


Add/Remove Placements

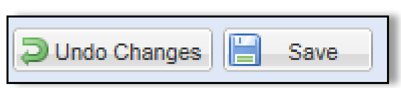
1. **Click on the Placement tab.**
2. **Click on the + icon to expand the organization hierarchy. Or, begin typing the RU or program name in the filter box to the right of Add Placement.**
3. **Click on the RU(s) that this user is associated with.**
4. **Click Add Placement, or drag and drop the RU in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

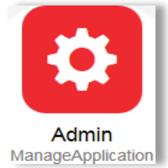


Viewing User Responsibilities

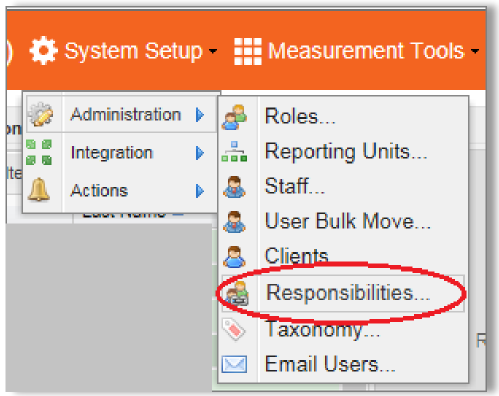
Responsibility assignment is what determines the user's ability to view clients and staff assigned to a specific RU. Responsibilities are automatically assigned and removed when Placements are assigned and removed.

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.

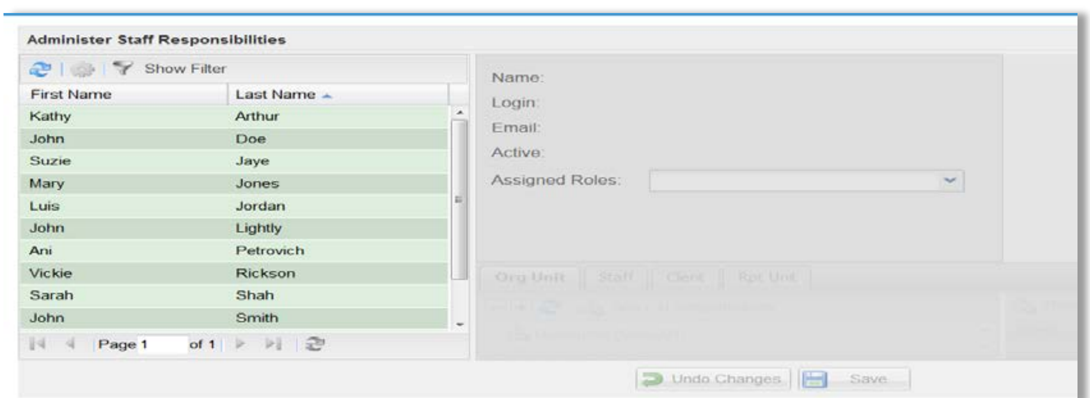
1. **To view a staff member's responsibilities, click the Admin box from the Home screen.**



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

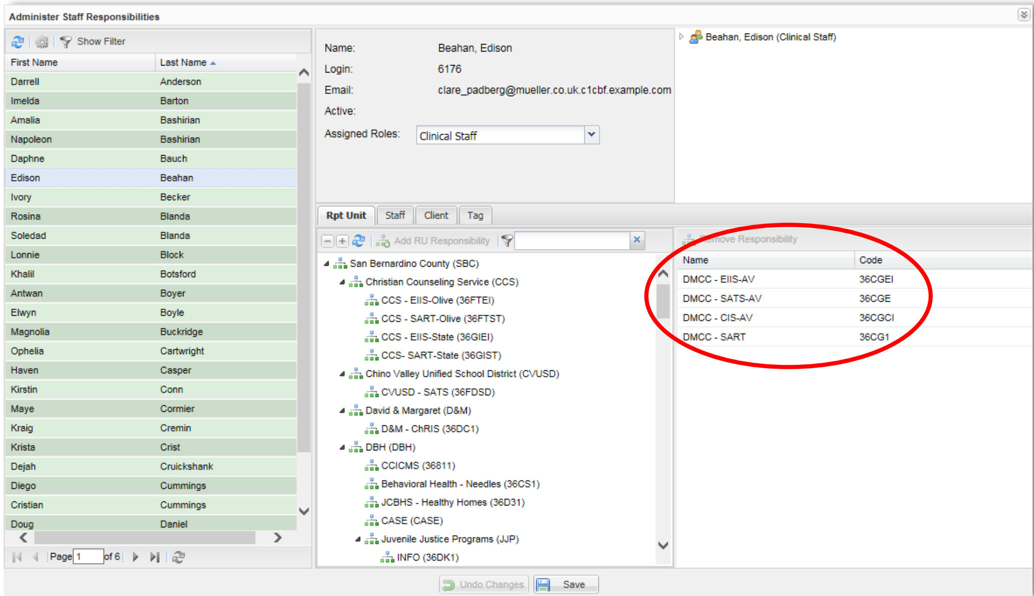


- The Administer Staff Responsibilties screen appears:



- Filter for the staff member to view the responsibilities.

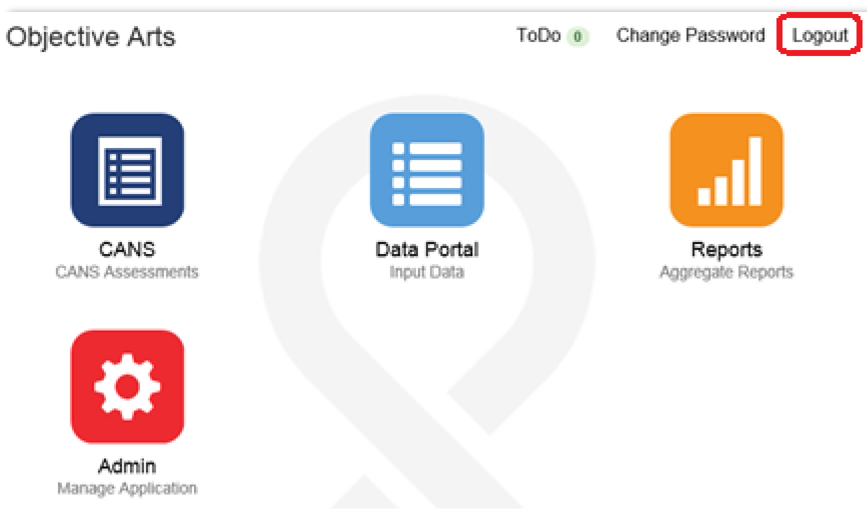
3. **Select the staff member by double clicking on the staff name to show the responsibilities. The staff member's responsibility shows in the far right pane.**
   - Verify that the RU(s) showing on the right, match all the RU(s) that show in the staff member's Placements on the Placement screen. If they do not, and RU(s) Responsibility is missing, you will need to add the RU(s) here in Responsibilities in the same manner RU(s) for Placement are added (review the Add/Remove Placements section if necessary).



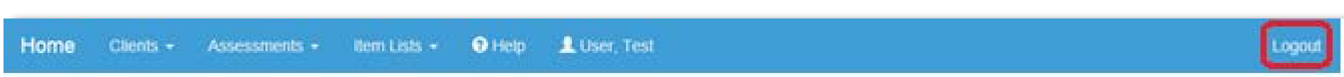
Logging Out

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

   From the Home screen: Click Logout.



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



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.