Behavioral Health

County of San Bernardino

Objective Arts (OA) SME Desk Reference

DBH
8-19-2019

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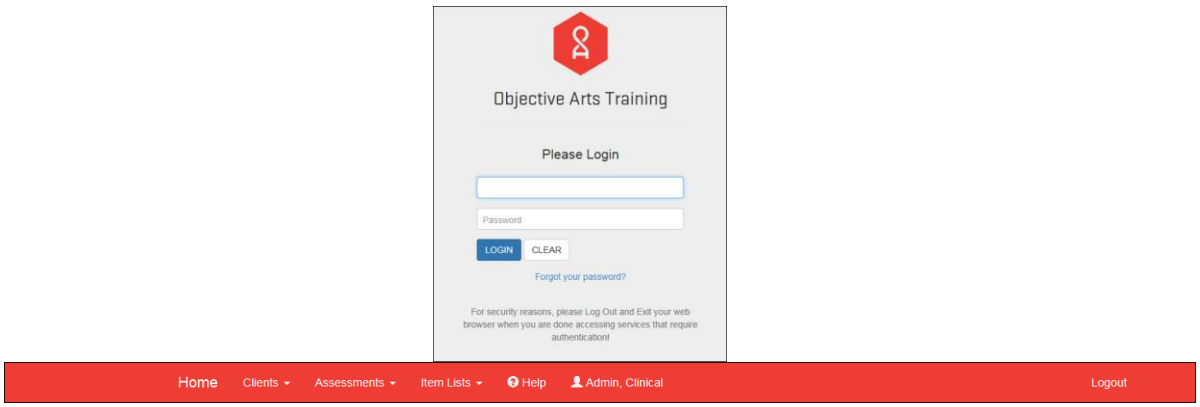
Important Notes

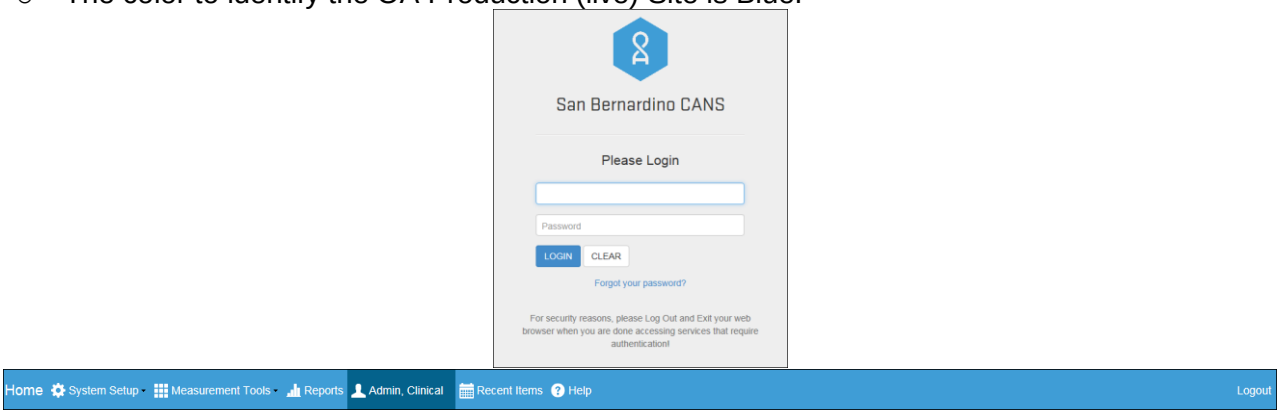
This document is dynamic; as changes are made new versions will be posted to the website. Please check back periodically for updates.

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.

Objective Arts (OA) Subject Matter Expert
Expectations and Responsibilities

Subject Matter Experts (SME) are ***technical experts*** in the Objective Arts program for the agency. They do not have extra abilities in OA.

SMEs must:

- *Attend OA Basic training OR be trained by the agency trainer.*
- *Attend SME/Reports Training.*

Expectations:

SMEs are the point person/"Help Desk" for all OA-related questions from your agency's staff, helping staff with logging in, entry issues, technical errors, etc. ******The San Bernardino County ISD Help Desk does not provide support for Objective Arts******

- Must have an OA role (Office Assistant, Supervisor, Clinical Admin., or Domain Clinical Admin.) with permissions to create staff profiles, enter CANS assessments, enter 0-5 measurements for applicable programs, and extract data/reports.

- Have a working knowledge of all OA basic tasks.

Responsibilities (including but not limited to):

- Create and Edit User Profiles
  - Creating a User Profile
  - Assign/Remove a Role
  - Add/Remove Placements
  - Reset Passwords
  - Activate/Deactivate User Profiles (IMMEDIATELY**,** or no later than by the close of the next business day, upon employee terminations)

- Monitor Staffing – User Export
  - Export Staff Data to CSV Files
  - Maintain Mismatch Report (Sent from DBH)

- Temporarily Open a Client to the RU

- Create and Run Reports

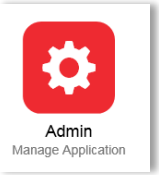
  - Report Parameters
    1. Tickler
    2. Expected Assessments
    3. Reliable Change Index
    4. Outcome Snapshot
    5. Impact
    6. Algorithm Client Scores by OU Report

- If needed, train agency staff or refer staff to OA training with DBH WET.

Navigation Refresher

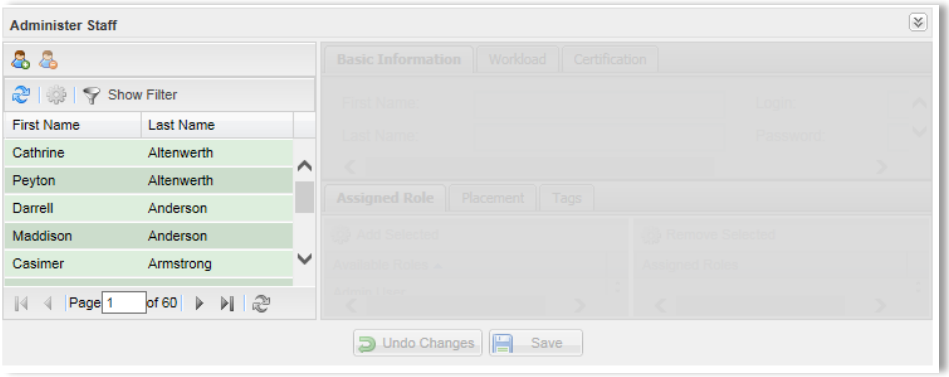
Navigating to the Administer Staff Screen

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



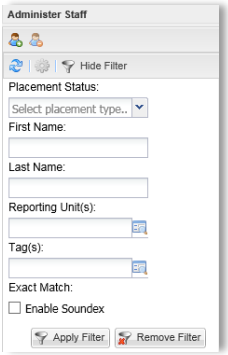
Depending on your browser settings, you may see “Only secure content is displayed”, along the bottom of the screen. If so, and you are working on a private computer (not used by the general public), click “Show all content”.

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

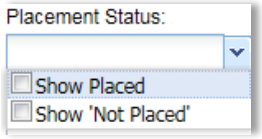


Filtering the Staff List

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.
If you only want to see the staff that has a placement, check Show Placed.
If you only want to see staff that are not placed, check Show 'Not Placed'.
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.

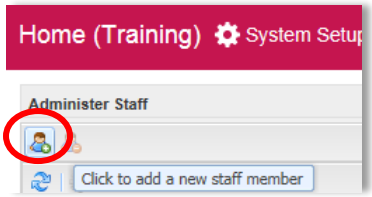
2. **Click Apply Filter or press Enter on your keyboard.**

Create and Edit User Profiles

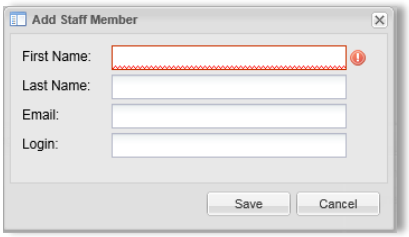
Creating a User Profile

Note: Always Filter the Staff List first to check if the staff member has a profile.

1. **Access the Administer Staff Screen. Click the Add a New Staff Member button near the top left.** A dialog box will open to enter the staff member's information.



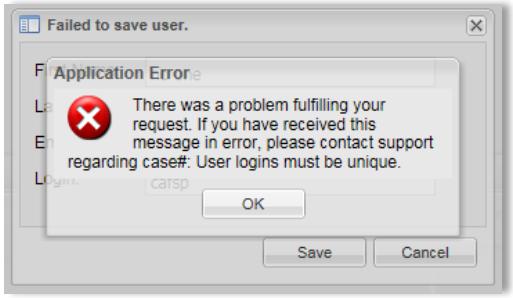
2. **Enter the staff member's profile information, all fields are required.**



Use the staff member's Simon number for the User name for any staff member who has or will complete an assessment. If the staff member does not have a SIMON number, you must cancel this transaction and complete the DBH IT Staff Master form for requesting a SIMON number.
If the staff member will not be completing assessments, but may be completing the data entry, and does not need a SIMON number, and is working for a DBH contract agency, use the following naming convention: FirstInitialMiddleInitialLastName_RU (e.g., Donald D. Duck working in RU 36XXYY: DDDuck_36XXYY). If a DBH staff member, use employee number.

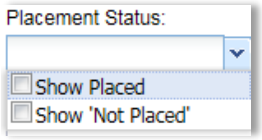
3. **Click Save.**

   If the following screen is returned, it means the staff member has a profile. (Go to Edit User Profile)



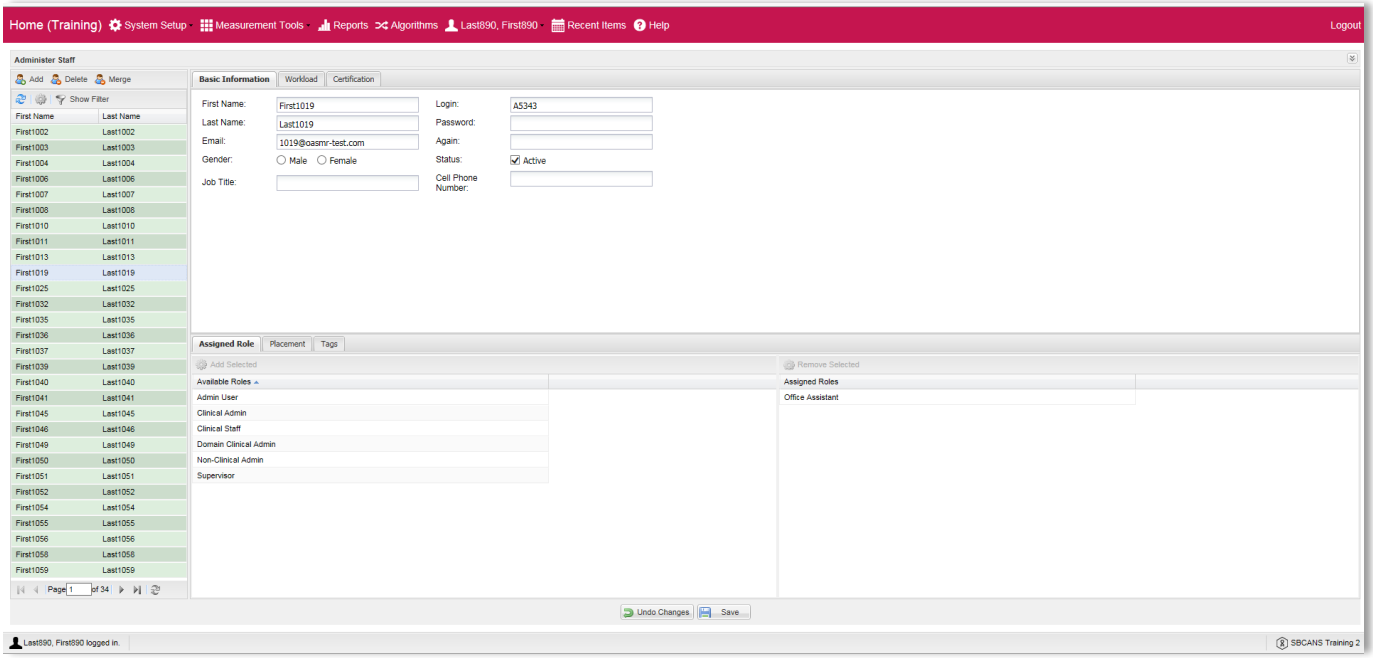
4. **Click Show Filter to filter for the new staff member.**

5. **Under Placement Status, select Show Placed and Show 'Not Placed'.** Because an RU has not been placed in the profile, you must select Show 'Not Placed' in order to see the profile you just created. However, you want to also select Show Placed so that you will be able to see the profile once you have "Placed" them (assigned them to an RU).

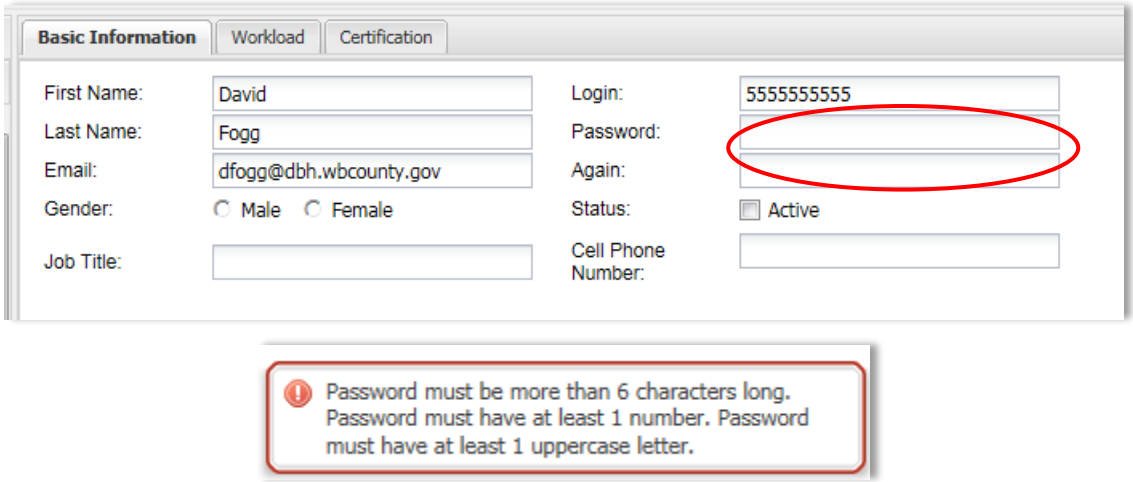


6. **Enter any further filter criteria you wish (e.g. First name, etc.), then click Apply Filter.**

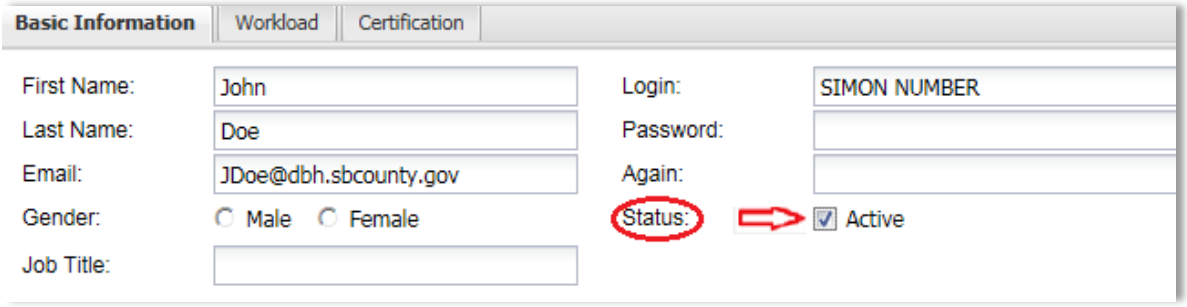
7. **Double click the name of the staff member to pull up the staff profile.**



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



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

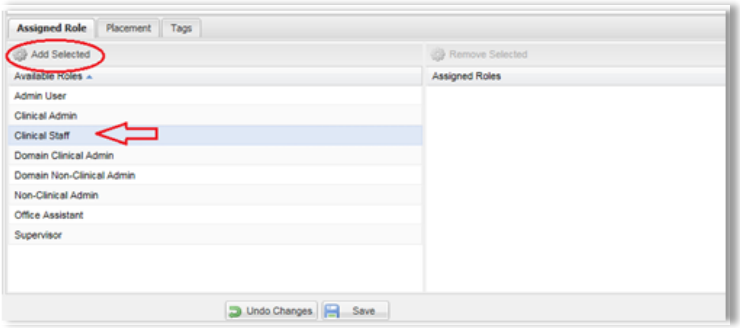


Assign/Remove Role

Note: You cannot assign a role with permissions greater than your own.

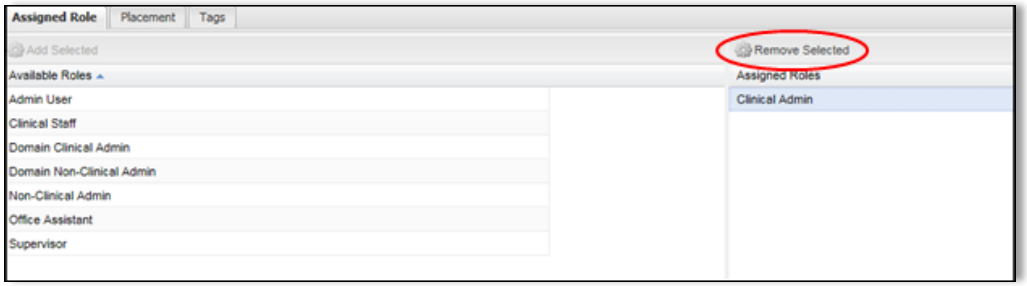
Assign only one role per staff member.

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



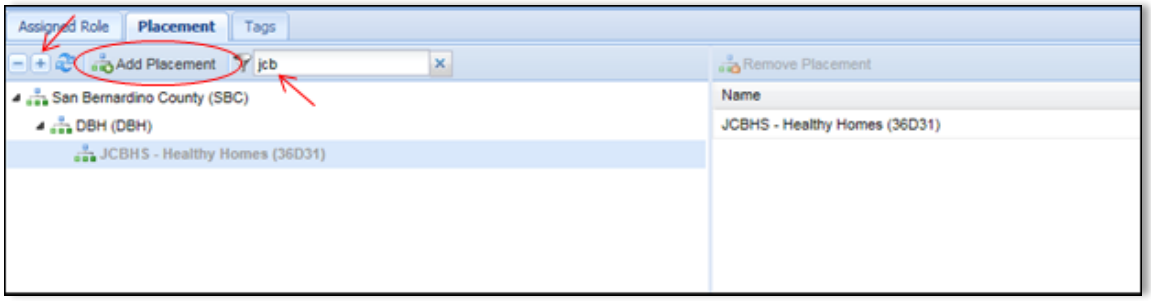
2. **Click Add Selected. The role will appear in the Assigned Roles pane on the right.**

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

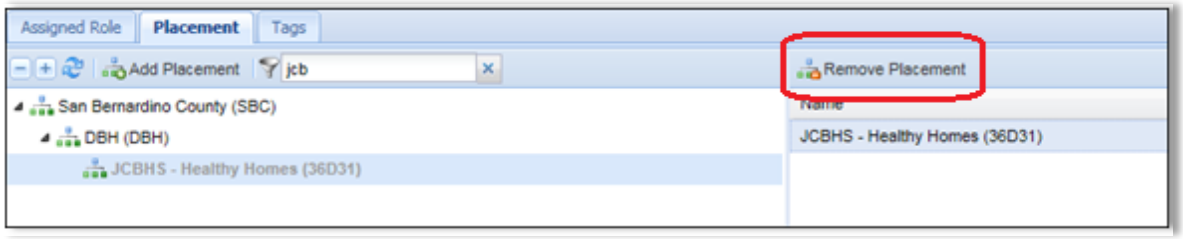


Add/Remove Placements

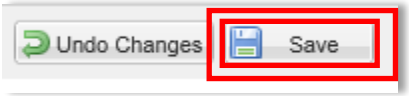
1. **Click on the Placement tab.**
2. **Click on the + icon to expand the organization hierarchy, or begin typing the RU or provider name in the filter box to the right of Add Placement.**
3. **Click on the RU(s) that this user is associated with.**
4. **Click Add Placement, or drag and drop the RU in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



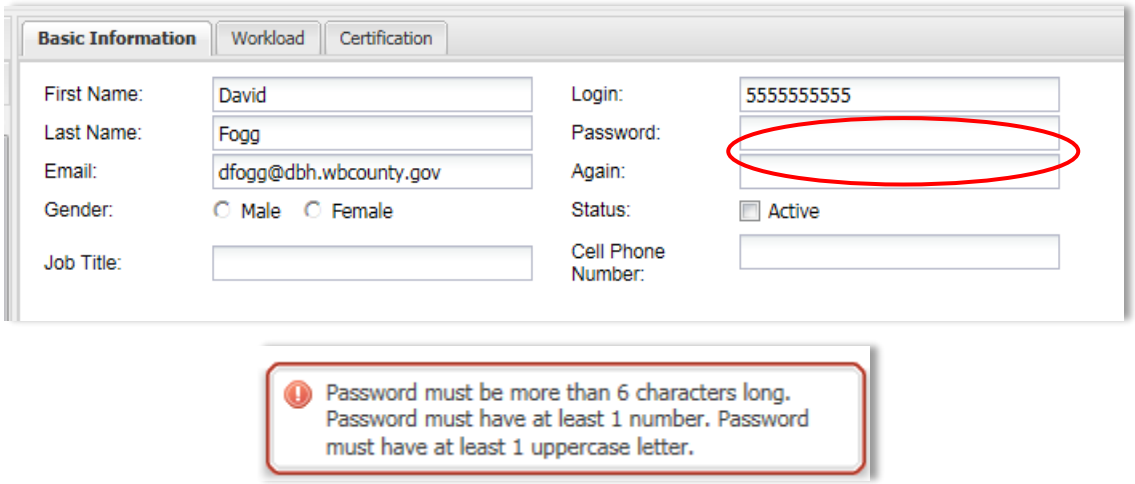
6. **To save your changes click the Save button at the bottom of the screen.**



Reset Passwords

1. **Filter the Staff List to find the individual profile.**

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



Edit User Profile

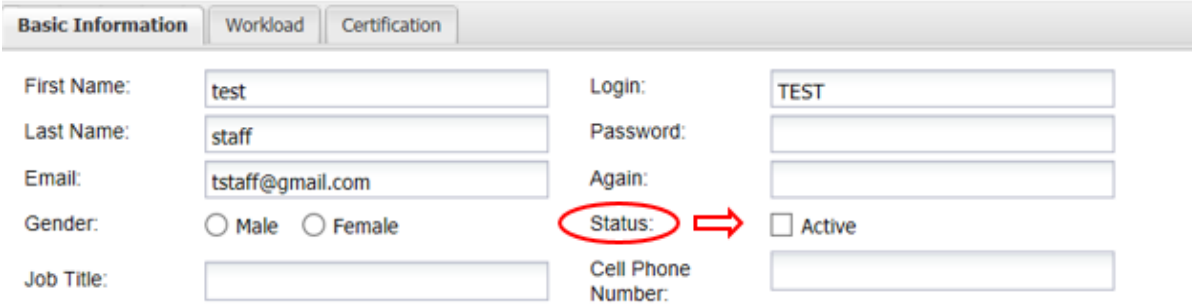
1. **Filter for the staff member.**
2. **Double click the name of the staff member to pull up the staff profile.**
3. **Verify email address and <u>change if necessary</u>.**
4. **Assign a password and confirm the password in the Again box.**
5. **Activate the profile by checking the Active box.**
6. **Assign Role - *<u>Assign only one role per staff member.</u>***
7. **Add Placement(s)**
8. **Save your changes.**

Deactivating User Profile

***** You must deactivate user profiles in both the <u>Training</u> and <u>Production</u> Websites IMMEDIATELY (no later than by the close of the next business day) upon the employee's termination *****

1. **Filter the Staff List to find the individual profile.**

2. **Deactivate the user's profile by unchecking Active Box**
   It is extremely important that the user profiles of all staff who terminate from your agency are immediately deactivated (by no later than the next business day). Failing to do so puts your agency at risk of exposing PHI/PII, and is out of compliance with HIPAA standards.



3. **Remove User's Role (see Add/Remove Role section)**
4. **Remove User's RU Placements (see Add/Remove Placement section)**
5. **Save**

Post TCOM Registration for Clinical Staff

1. **Complete Objective Arts Registration for Clinical Staff form.**

2. **Create the clinical staff member's profile in the Training website**. https://training-sbcans.oasmr.com.

3. **Provide the following information to clinical staff.**
   a. **Assigned login.**
   b. **Temporary password.**
   c. **The following exercise to be completed by the clinical staff and assessment ID number returned to the SME.**

Clinical Staff Task:
• **Login to the Training site at:** https://training-sbcans.oasmr.com. *NOTE: You can modify/add assessment data in the training site, so please experiment to the point that you are comfortable.*
• **Locate your "To Do" list. Review and Explore.**
• **Locate a client, create a new assessment, and save it.**
• **Provide assessment ID number:_____ to SME.**

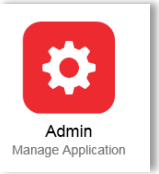
4. **Scan and email the OA Registration for Clinical Staff form to** DBH-OA@dbh.sbcounty.gov **with the Subject Line of: "Registration of New Clinical User for OA – {clinical staff name}".**

Monitor Staffing – User Export

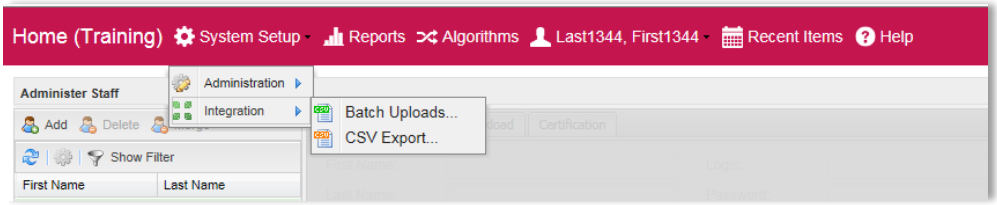
Note: If duplicate staff are found, immediately contact DBH-OA at dbh-oa@dbh.sbcounty.gov to merge and remove duplicates.

Export Staff Data to csv File

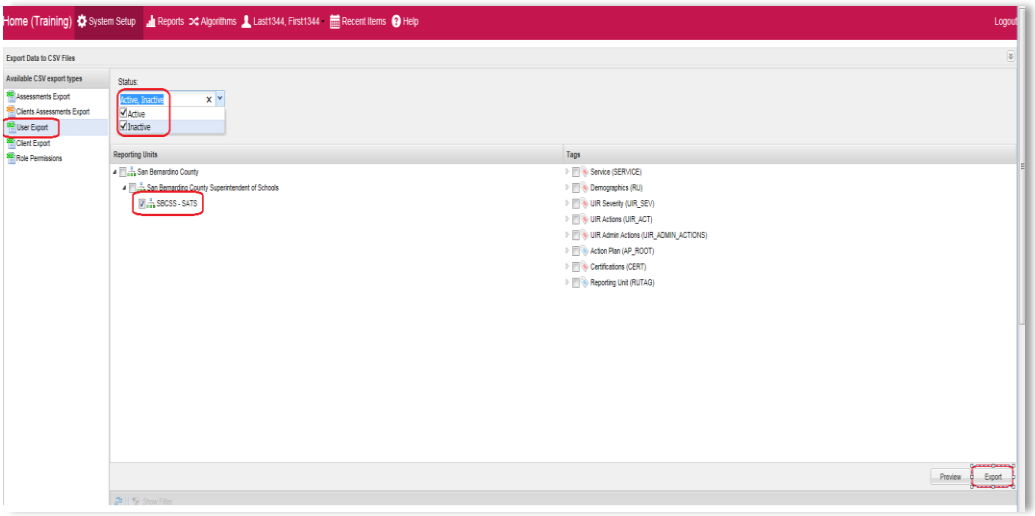
1. **From the Home screen, click the Admin box.**



2. **Click System Setup at the top, hover over Integration, on the sub menu, click CSV Export.**



3. **Choose User Export**
4. **Status: Active, Inactive**
5. **Reporting Units: The RU(s) needed to produce the report**
6. **Export**



This will return an Excel Spreadsheet of your agency's staff that have accounts in the OA system:

A	B	C	D	E	F	G	H
User Internal ID	First Name	Last Name	Middle Name	Email	Login	Placements	Roles
530	First530	Last530		530@oasmr-test.com	8470	SBCSS - SATS (36FRSD)	CS
531	First531	Last531		531@oasmr-test.com	8110	SBCSS - SATS (36FRSD)	CS
532	First532	Last532		532@oasmr-test.com	8111	SBCSS - SATS (36FRSD)	CS
533	First533	Last533		533@oasmr-test.com	8146	SBCSS - SATS (36FRSD)	CS
534	First534	Last534		534@oasmr-test.com	7708	SBCSS - SATS (36FRSD)	CS
536	First536	Last536		536@oasmr-test.com	8458	SBCSS - SATS (36FRSD)	CS

Maintain Mismatch Report (Sent from DBH)

When data is uploaded from SIMON to Objective Arts, DBH-OA receives a report of OA user discrepancies.

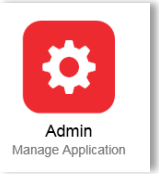
You will receive a list of staff where the User Login and the Reporting Unit Code combination are found in one or more episode records in SIMON that show the staff member providing a service for a client; however, the staff member does not have a profile, isn't active, or does not have the RU as a placement in OA.

One or more of the following actions will correct the mismatch:

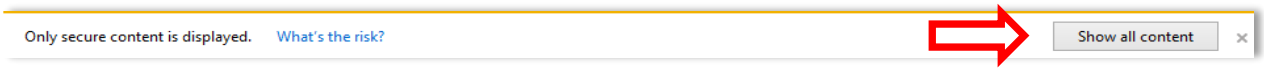
- Make the staff profile active.
- Add the missing RU(s) to the user profile if she/he is providing services to clients under this RU.
- Change the primary therapist in SIMON if the staff member is no longer the clinician providing services to this client.
- Close this episode in SIMON if services are no longer being provided to this client by your program.

Temporarily Open a Client

1. **From the Home Screen, click Admin.**



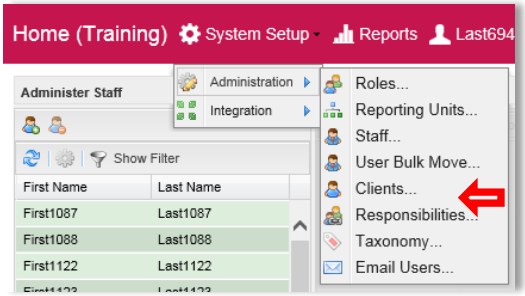
A message may appear at the bottom of your screen. If it does, click Show all content.



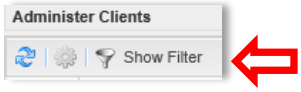
2. **Click System Setup.**

3. **Hover over Administration (do not click).**

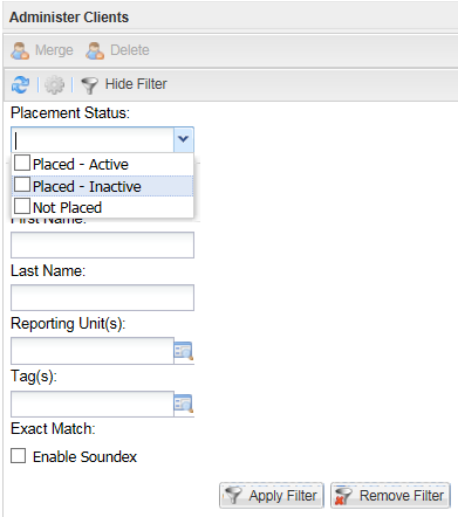
4. **Click Clients.**



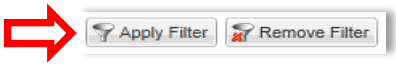
5. **Click Show Filter.**



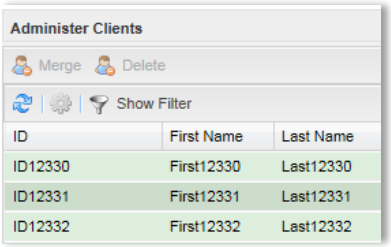
6. **Enter client information.** Be sure to check Show Placed and Show 'Not Placed' under Placement Status. It is NOT necessary to enter information in all of the search boxes. You may enter as much or as little information as you wish to narrow the list.



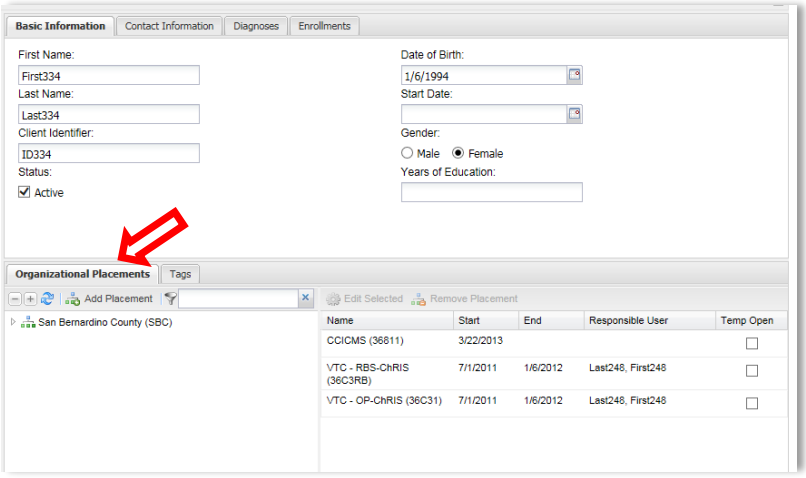
7. **Click Apply Filter**



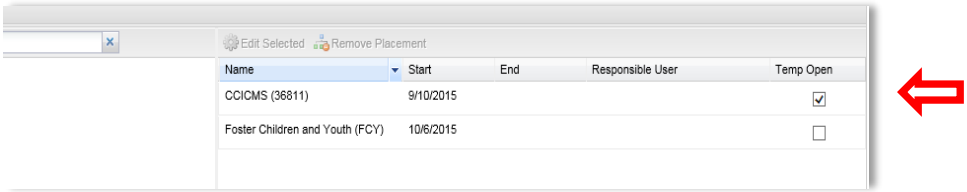
8. **Double click the row with the client name. It will open on the right.**



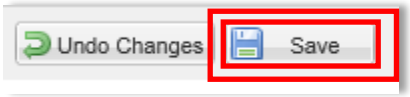
9. **Click the Organizational Placements tab if the system didn't default to it.**



10. **Click the Temp Open checkbox in the row where your RU is listed.**



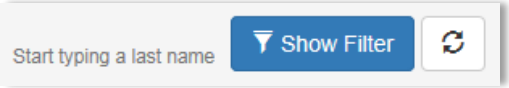
11. VERY IMPORTANT! Click Save at the bottom. If you do not click save, the client will still be closed and you will have to repeat this process.



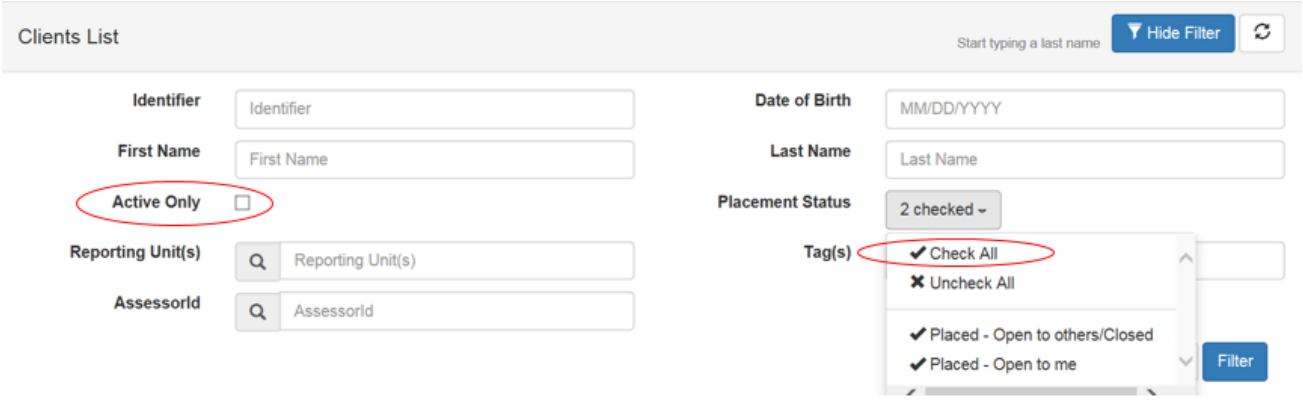
Note: The client will be open for 3 days, after which time the placement in OA will close again.

12. Filtering the Client List

a. After you complete the prior steps, navigate back to Home and then to the Data Portal. This defaults to the Clients List where on the top right of the screen you will see the following:



b. After clicking the Show Filter button, enter in the client's identifier (SIMON #) or other identifying information and uncheck the Active Only box and under Placement Status click Check All:

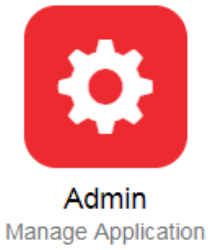


Assign the Congruency Report tag to Staff User Account

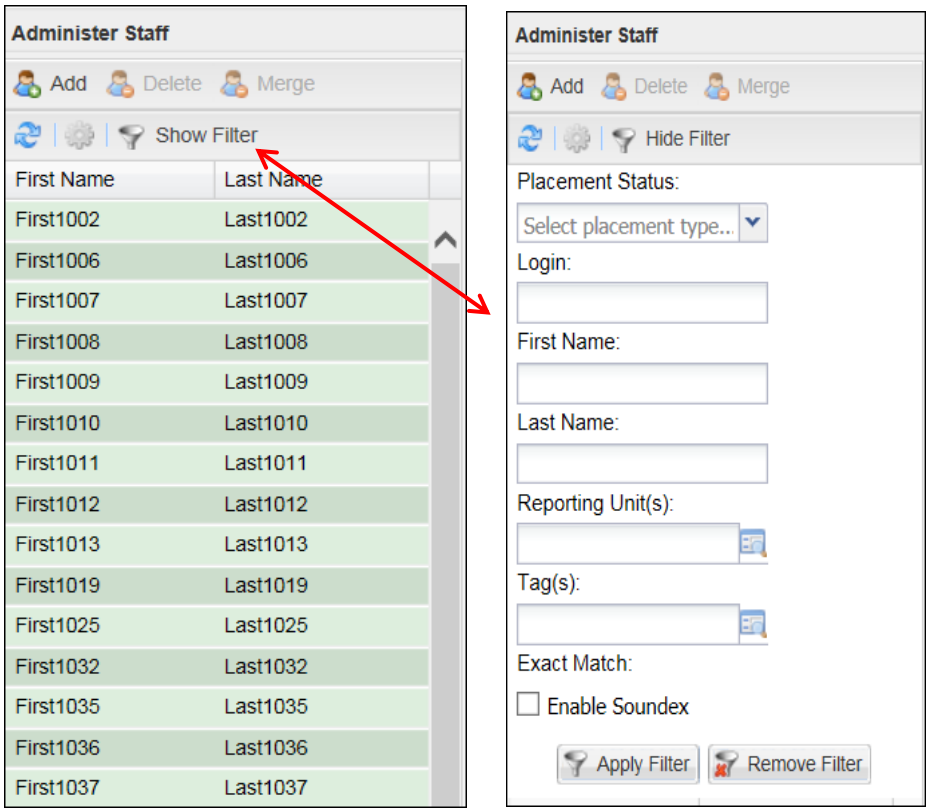
Designating Staff to Receive the Congruency Report

The staff designated with this tag will receive auto-generated emails of the Congruency Report for the agency and program(s) that are assigned to their OA user account.

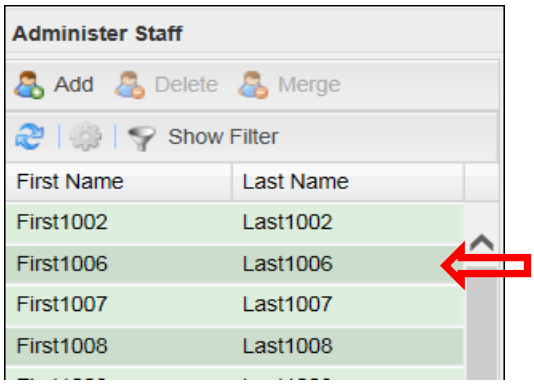
1. **From the Home Screen, select the 'Admin' icon.**



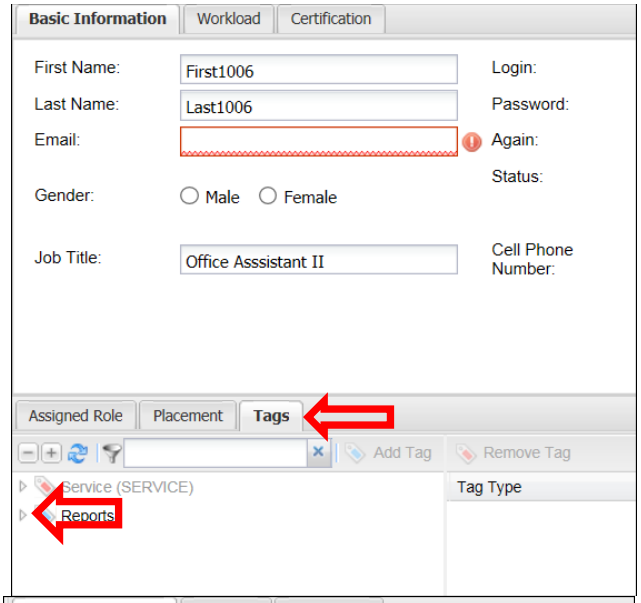
2. **Select staff directly from your staff list, or select the 'Show Filter' option to search for staff using the available parameters (See '[Filter the Staff List](#).'**



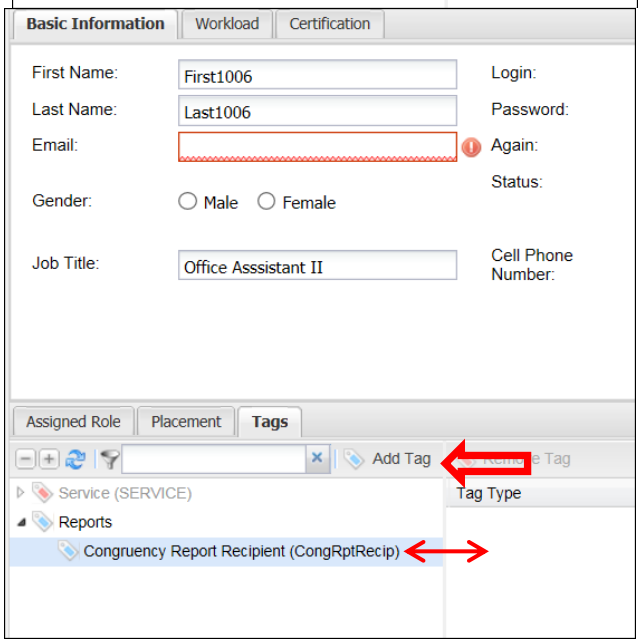
3. **Once you have located the staff member, double click on the name to open the information screen.**



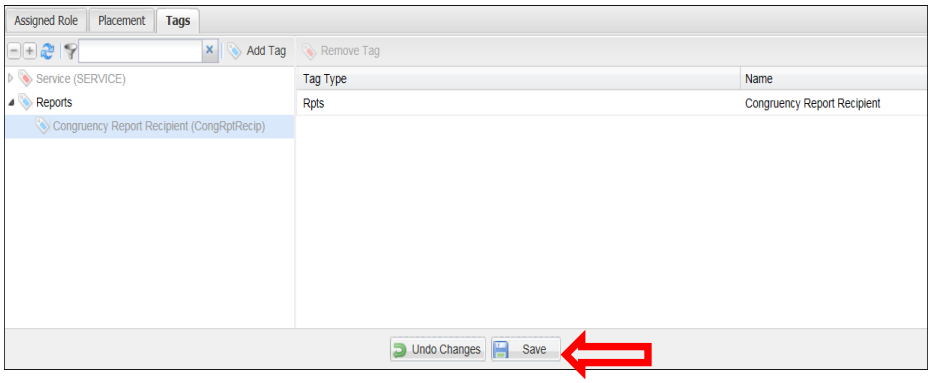
4. **Select the 'Tags' tab at the bottom of the screen. Then select the arrow in front of the Tag, "Reports".**



5. **Assign the tag to the staff:**
   a. **Click once on the tag, "Congruency Report Recipient (CongRptRecip)". Move this tag to the 'Tag Type' box on the right, by selecting the tag and then clicking the 'Add Tag' button, or by using the drag and drop method.**



6. **Once the tag has been assigned to the staff, click the 'Save' button to save the change.**



Additional Resources for Supervisor and SME

CANS-SB Website: http://wp.sbcounty.gov/dbh/cans/
ANSA-SB Website: http://wp.sbcounty.gov/dbh/ansa/

OA User Manuals http://wp.sbcounty.gov/dbh/tcom/ - under the Objective Arts section on the right

Email: DBH-OA@dbh.sbcounty.gov

******The San Bernardino County ISD Help Desk does not provide support for Objective Arts******