San Bernardino County Behavioral Health

Objective Arts Frequently Asked Questions (FAQ's)

Site Navigation

Where do I go to view the assessments submitted by staff in my program?
To view all Assessments:
1. From the OA home screen, click **Data Portal.**
2. On the navigation bar at the top of the screen, select **Assessments**.
3. Select **List** from the drop down. This will take you to the **Assessments List** page.

Reference – OA Basic Training Manual

Where do I go to approve Assessments submitted by staff in my program?
(for Supervisors)

Assessments can be approved in one of three ways: **Sequential Approve**, **Batch Approve**, or **Individual Approve**. Please see the OA Basic Training manual for more information on each approval method.
To Approve Assessments (*Individual Approve*):
1. From the OA home screen, click **Data Portal.**
2. On the navigation bar at the top of the screen, select **Assessments**.
3. Select **Approve** from the drop down. This will take you to the **Assessments in need of approval** page.
4. Select and review each assessment. Click **Approve** or **Reject** at the bottom.

Reference – OA Basic Training Manual

Where do I go to view my or my staff's workload?

To view your workload:
1. From the OA home screen, select **Workload.** This will take you to the **My Workload** page.

To view your staff's Workload (*for Supervisors*):
1. From the OA home screen, click **Admin**. This will take you to the **Administer Staff** page.
2. Filter for the specific staff member whose workload you want to see by selecting **Show Filter** and entering at least one search parameter in any of the search fields. Click **Apply Filter** to narrow down your search.
3. Once staff account is located, double click the staff member's name to open their profile.
4. At the top of the pane in the staff members page (Basic Information, Workload, and Certification), select the **Workload** tab. This will show you the current list of clients in the staff's workload.

Reference – OA Basic Training Manual, OA SME Manual

Administrative Activities

Who needs to have an OA user account?

All staff (DBH and contract agency) who do one or more of the following tasks must have an OA account:

- Enter TCOM assessments (regardless of if in OA or EHR).
- Approve TCOM Assessments.
- Pull and/or review TCOM Assessment data reports.

This will ensure that there is an OA account available for all assessments to link to.

Reference – OA Basic Training Manual

I have forgotten and/or lost my password. How do I get it reset?

There are two ways to reset your password for the LIVE environment: Manual or through your agency SME.
If you need to have your password reset for the TRAIN environment, please reach out to your SME. If there is no SME for your organization, please contact the DBH-OA inbox for further assistance.

Manual:

1. From the OA Website (https://sbcans.oasmr.com), click the **Forgot your password?** link below the login button.
2. Enter your Login in the **Username** field.
3. Enter your email in the **Email** field.
    a. This email must match the email associated with your account in OA.
4. Select the checkbox for **I'm not a robot** and complete the CAPTCHA accordingly.
5. Click **Request**. You will receive a password reset link in your email inbox within a few minutes.
6. Once you receive the password reset email, please follow the instructions on the email to reset your password.
    a. When creating a new password, passwords must be at least seven (7) characters in length, include at least one (1) uppercase letter, and at least one (1) number.
7. Click **Submit** to update to the new password entered. This will take you back to the initial log-in screen.
8. Log in using your Username and new password.

If you do not receive the email with the password reset link, the following may have occurred:

- The email entered for you in Objective Arts may have been incorrectly entered.
- You may have tried to enter the wrong password multiple times.
    - If so, the system will not allow you to request a password reset.

In these instances, you will need to contact your agency's OA SME for further assistance. Provide your SME your login ID and name. The SME must enter a generic password into the system and provide that password to you to change upon successful log in.

<u>Subject Matter Expert:</u>

1. From the OA home screen, click **Admin**.
2. Filter the **Staff List** to find the user's profile based on the information staff provided. Double click on the Staff name to open their profile.
3. Assign a temporary **Password** and repeat the password in the **Again** box.
   Example Password: Newpass1
4. Click **Save** to apply changes.
5. Provide the staff with their updated login credentials, and have them sign in. They may be prompted to then update their password again when they log in.

Reference – OA Basic Training Manual

How do I add a client to OA?

Clients are added to the OA system via a DBH billing system data upload. OA users are not able to create or delete a client or client information from OA.

- If a client was mistakenly opened to your program in the DBH billing system, and then that opening was deleted from the DBH billing system but has not been removed from your program in OA, please contact your program's OA SME.

Reference – OA SME Manual

How do I find a client?

To view a specific client:

1. From the OA **Home screen**, click **Data Portal**. The **Clients** list will show.
2. Click **Show Filter**
3. Search for a client by using any of the available parameters (e.g.: the client's DBH medical record number or their first and/or last name).
   a. If you have trouble finding a client with a hyphenated last name, try searching by removing the hyphen. The spelling of names comes from the DBH billing system, which saves whatever was input by the person that completed the initial client information in myAvatar.
   b. If you find that a client's name is misspelled, you will need to ask your billing clerk to make the change in the DBH billing system.

Reference – OA Basic Training Manual

Who is authorized to approve/reject TCOM assessments?

An OA user with the following roles is able to approve or reject TCOM Assessments:

- Supervisor (SU)
- Clinical Administrator (CA)
- Domain Clinical Administrator (DCA)

Reference – OA SME Manual, OA Roles Summary Sheet

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

Before creating a new account, search for a prior staff account to avoid creating duplicate accounts.

1. From the OA home screen, click the **Admin** button. This will take you to the Administer Staff page.
2. Search for prior accounts by clicking **Show Filter**, then enter any relevant parameters, and then Click **Apply Filter**.
    a. You may need to have ‘Show Placed’ and ‘Not Placed’ checked.
    b. Enter in a few characters of the Staff’s first and/or last name.
3. Search results will determine how you proceed:
    a. If an existing account is found, <u>stop here</u>. Open the staff account and update any profile settings as needed.
    b. If an account is not found, then proceed with the next section to continue creating a new account.

To create a new account for a staff member:

4. Click the **Add** button located on the top left of the **Administer Staff** screen.
5. A dialog box will open. Enter the staff members’ information. Then press the **Save** button to apply your changes once the below information has been entered:
    a. Enter the person’s First Name.
    b. Enter the person’s Last Name.
    c. Enter the person’s Email.
    d. Enter the Login (see Staff username requirements below).

Staff Username Requirements

If your staff is…	Then ID format will be:	Example:
Clinical Staff	their myAvatar staff number without the leading zeros	0036XXXX in myAvatar becomes 36XXXX in OA
DBH Admin/Clerical Staff	Their employee ID	AXXXX
Non-DBH Admin/Clerical Staff	FirstInitialMiddleInitialLastName_RU	Donald D. Duck working in Reporting Unit (RU) 36XXYY: DDDuck_36XXYY

6. Locate the new Staff member by utilizing the **show filter** button and entering in information to the search parameter fields.
    a. Be sure to have ‘**Show Not Placed**’ checked under placement status to expand search as much as possible.
7. Double click the staff member when the account is located to open the staff’s account.

8. On the top pane, enter the staff member's temporary password in the **Password** box, then again under the **Again** box.
    a. The password must be at least seven (7) characters in length, contain at least one (1) capital letter and at least one (1) number.
    Example Password: Newpass1
    b. The user will be prompted to enter in a new password when they log in for the first time.
9. Check the **Active** box to activate the staff member's account.
10. Under the **Assigned Role** tab, located below the basic information box, double click the **role** you wish to assign the person (you may also single click the role and then click 'Add Selected' to assign the role). The role will appear to the right. *Please see the OA Summary Roles document for a list of available roles that can be assigned.*
11. Click on the **Placement** tab located to the right of the **Assigned Role** tab.
    a. If necessary, expand the list by clicking on the plus (+) sign.
    b. You may also need to single click the white arrow that appears before the program name to view the program RU(s).
12. Select the RU(s) the staff member will work in by single-clicking and selecting **Add Placement** (located on the blue bar above the list of RUs).
13. Click **Save** to successfully add the new user account for your staff member.

Reference – OA SME Manual; OA Summary Roles Document

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

If a staff member is able to log on and access OA but is not able to view clients on the Client page, then it may be that the staff members' placement was not added properly and/or saved.
Please ensure that **Save** is pressed after the following actions are completed:
- Assigned Role is selected and added.
- Placement (RU) is selected and added.
- Ensure account is active via checkbox.

To assign Placement(s) to the staff member's account:
1. From the OA home screen, click **Admin**.
2. Utilize the filter to locate the staff member's account.
    a. You may need to have both '**Show Placed**' and '**Not Placed**' checked
3. Double click the staff member account when its located.
4. On the bottom pane, click the placement tab
5. Assign the staff member to the appropriate RU.
    a. You will only be able to assign an RU that you currently have access to. If additional RU's are needed, please contact the DBH-OA Inbox for further assistance.
6. Check that the **Active** box has been checked for the staff member.
7. Click **Save**.

The staff member should now be able to view clients when they log back in.

Reference – OA SME Manual

TCOM Assessments

Can items on an approved TCOM Assessment be changed if we notice a mistake?

Yes, items on an approved TCOM assessment can be changed if there was a mistake. However, only an OA user with the role of Supervisor, Clinical Admin, and Domain Clinical Admin can edit an assessment that has been approved. Please note that all edits to an approved TCOM assessment require a reason for the edit.

Reference – OA Basic Training Manual

Can I skip an item on a TCOM Assessment?

Core TCOM Assessment items cannot be skipped. Every item in a required module must be completed. When entering an assessment into OA, required questions will be marked with an asterisk. Additional information is also provided as a popup when hovering over an item when completing an assessment.
Furthermore, when attempting to submit, validation errors will highlight the items that are required to be completed, as well as additional follow up items that become subsequently required.

Please review the appropriate TCOM assessment manual for guidance on scoring items you are not sure about.

Reference – OA Basic Training Manual, DBH TCOM Website

I'm entering a TCOM Assessment for another user in my program. How do I change the assessor's name from my name to the actual assessor's name?

There is a process to complete a TCOM Assessment for another user in your assigned program.

To enter in an assessment for another user in your program:

1. From the OA home screen, click **Data Portal**.
2. Utilize the filter to find the client, click on the row with their name once located, and then scroll down to the client's **Assessments** history screen at the bottom.
3. Select **New Assessment** located along the bottom of the screen and select the appropriate TCOM assessment.
4. In the new assessment, enter the date the assessment was completed.
5. Change the Assessor by clicking on the assessor's name (in blue), and then select the name of the staff member who completed the assessment
    a. Select **Show Filter** to filter for the staff member if necessary.
6. Complete the remainder of the assessment as required.
7. Press **Save** to save the assessment. Click submit when the assessment is ready to be approved.

If the assessment has already been submitted, this will limit how the assessor's name is changed.

If the assessment has already been entered and submitted, but not yet approved, the assessment can be recalled and edited.

1. From the OA home screen, click **Data Portal**.
2. Utilize the filter to locate the client, and then then click the name to navigate to the client's page and access their assessment history at the bottom of the page.
3. Click on the row of the assessment that needs to be changed.
4. Once the assessment is opened, recall the assessment by clicking on **Recall** at the bottom of the screen.
5. Press **Edit** to edit the assessment.
6. Change the Assessor by clicking on the **assessor's name** (in blue), and then select the name of the staff member who completed the assessment.
    a. Select **Show Filter** to filter for the staff member if necessary.
7. Click **Save** to apply changes.
8. Click **Submit** to resubmit the assessment in order to return the assessment to pending approval status.

If an assessment has been approved by a supervisor, only a supervisor or above with administrator duties is able to edit the assessor field.

Reference – OA Basic Training Manual

I need to enter a TCOM assessment for a client who has a closed episode with my program. How do I do this?

To enter an assessment for a client who no longer has an active placement in your program, the client's episode needs to be reopened. This will be completed by someone in your organization that has an OA role with Administration permissions (such as office assistant, supervisor, etc.).

To temporarily open a closed client:

1. From the home screen, click **Admin**.
2. At the ribbon on the top, click **System Setup**, then hover the mouse over **Administration**, then click on **Clients….**
3. Utilize the filter to locate the client's page.
    a. Be sure to check **'Not Placed'** under placement status.
4. Once client account is located, double click on their name to open their page.
5. Locate the program placements for the client (lower right area) and under the Temp Open column **Check** the appropriate program placement that you need to reopen.
    a. The client may have other open and closed placements listed for them. Please ensure to check only the applicable program assignment/placement that you need to temporarily reopen.
6. Click **Save** at the bottom of the page to save these changes.

Assessments will now be able to be entered for the client for three (3) days. After this time passes, the client will revert to being inactive in your RU automatically. However, if assessment data was entered before the three (3) days pass, then it is recommended that the temp open box is unchecked, and changes are saved to ensure the client is closed.

Reference – OA SME Manual

Reports

I want to know which clients need an initial TCOM assessment completed. Where do I go?

To see which clients need an initial assessment, a Tickler Report can be run. This report is generated and emailed out weekly to users. However, to manually generate:

1. From the OA home screen, click **Reports**.
2. Under **My Reports** tab, select **New**.
3. From the Report Types menu, search for and double click **Tickler with Episodes** (this will apply for TCOM assessments).
4. A Tickler with Episodes parameter pane will open on the right-hand side of the window. Here, select the following parameters (*as applicable*):
    a. Sliding Date Range OR Start Date and End Date
        i. Select the desired timeframe. *This field will be required in order to continue.*
    b. Reporting Units
        i. Select your reporting unit.
    c. Instruments
        i. Select CANS and/or ANSA assessment. *This field will be required in order to continue.*
5. Once the parameters have been selected, click **Save** at the top of the parameters field (next to Cancel) to apply your parameters to the report. The report will now show in the Personal Reports area of the screen.
6. Single click the report name.
7. Select the drop-down arrow for **Run** and select **Immediate** to run the report in another window or **Delivered** to have the report emailed to you.
8. Once the report is generated, check the **Initial** column for each listed client to see the date the initial assessment is/was due and/or completed. *Please use the legend to further understand the status of the current report.*

Reference – OA Reports Manual