San Bernardino County | Behavioral Health

San Bernardino County

Objective Arts

Basic Training Manual

Revised 08/2025

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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.

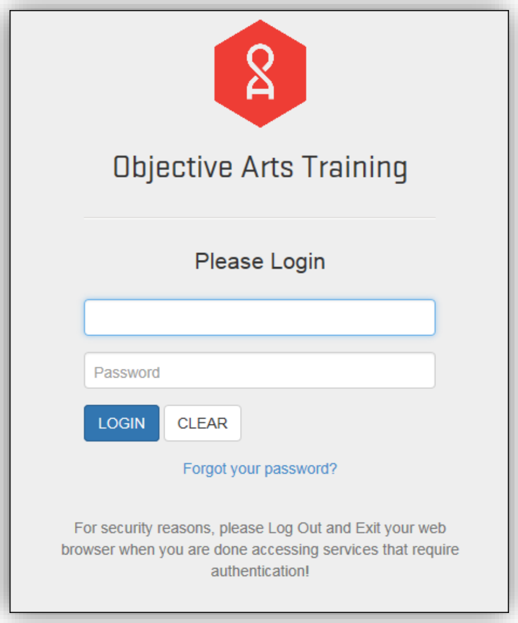
If you are using this manual to learn or practice using the Objective Arts (OA) database, please be sure that you are logged into the OA Training site.

All Objective Arts (OA) Website Addresses

- Training: https://training-sbcans.oasmr.com.
- Production: https://sbcans.oasmr.com.

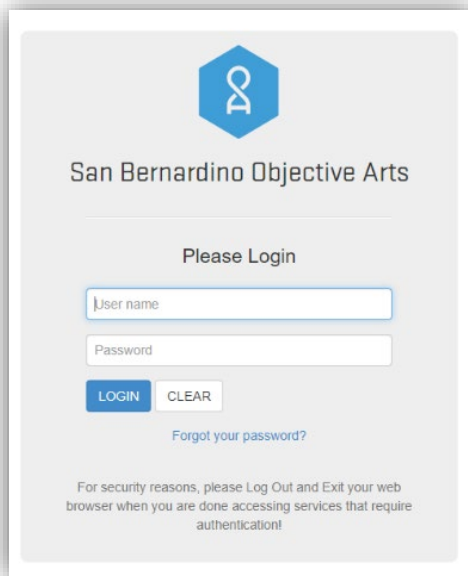
OA Training (TRAIN) Site

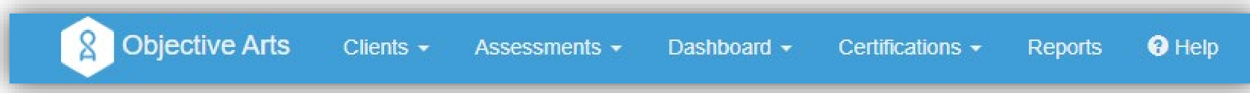
- Website: Training: https://training-sbcans.oasmr.com
- The emblem and toolbar color to identify the OA Training (TRAIN) Site is Red.



OA Production (LIVE) Site

- Website: Production: https://sbcans.oasmr.com
- The emblem and toolbar color to identify OA Production (LIVE) Site is Blue.





Note: This document contains screenshots from the Production (**LIVE**) website. This was done so that you can get familiar with the site's look. However, to safeguard client information, some screenshots will be taken from our Training site.

Additionally, there may be certain screenshots that may still contain additional client information. This information will be redacted in the screenshots accordingly.

GETTING STARTED

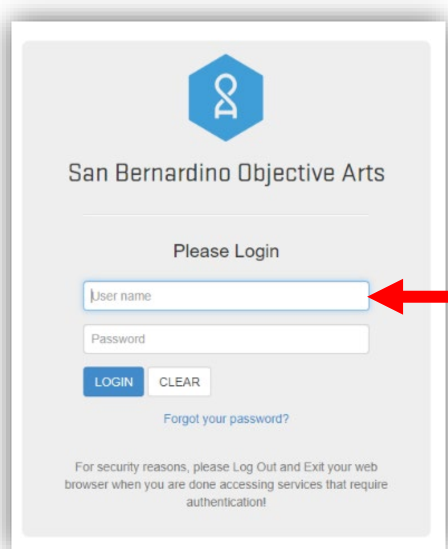
Logging In to Objective Arts

1. Log into Objective Arts (*LIVE*) at: https://sbcans.oasmr.com.
2. Enter your username.
- Your username may fall into one of the following formats:

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

Note: Only your clinical login should be used to complete clinical actions in the website.

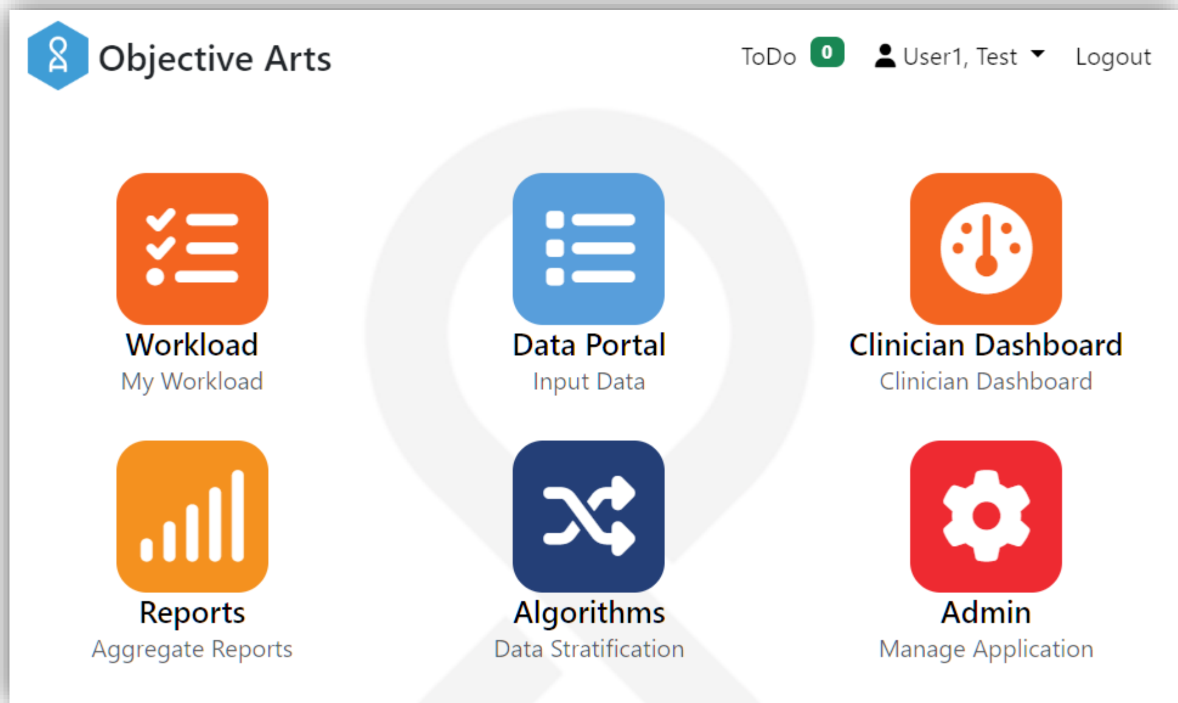
- You will be provided with a password from your program's designated OA Subject Matter Expert (SME).
    - SME's are **technical experts** in the Objective Arts program for your agency.



Enter your username only.

Your email address is **not** a valid

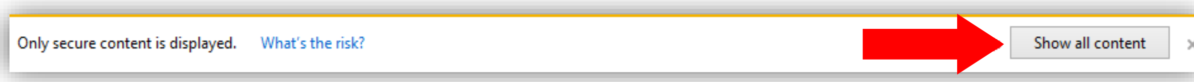
4. After logging in, you will be directed to the **Home Screen**.



Home Screen.

Note:

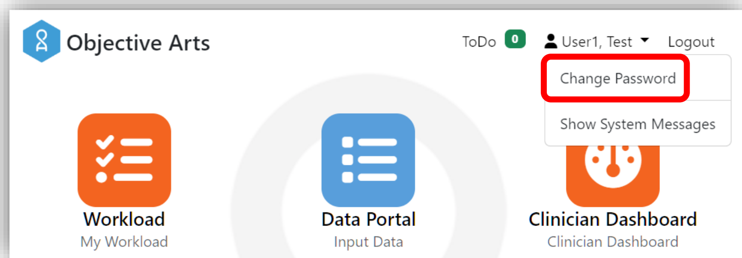
- Home screen appearance will vary depending on the permissions assigned to you.
- Depending on your browser settings, you may see a security bar at the bottom of the screen that states, "Only secure content is displayed." If so, and you are working on a non-public computer, click **Show all content**.



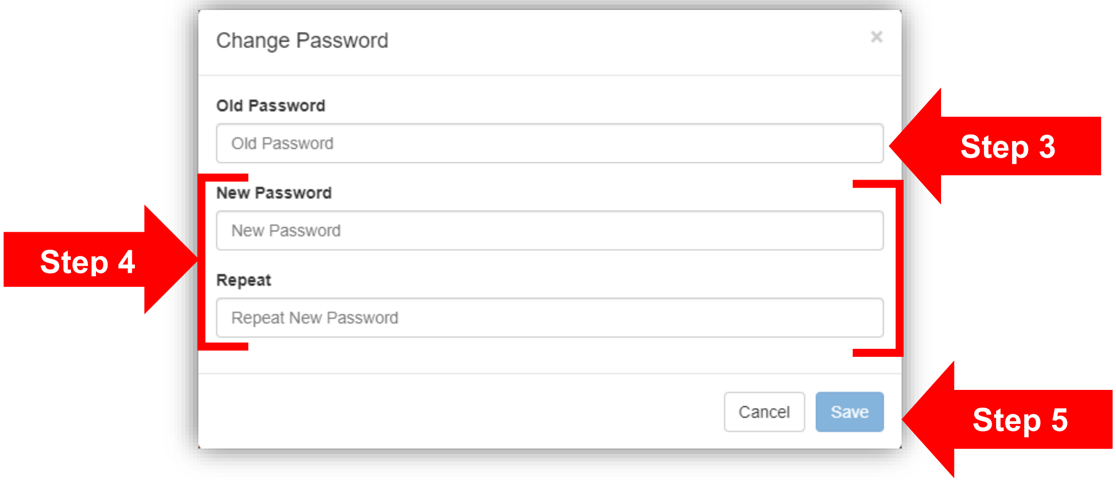
Changing Your Password

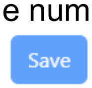
It’s best practice to change your password the first time you log in. However, you may not always be prompted to do so. You will need to change your password from the **Home Screen**.

1. At the top right of the Home Screen, click your name to open the drop-down menu and click the **Change Password** button.



2. The Change Password window will open:



3. Enter your old password.
4. Enter your new password. Repeat the new password.
   - Passwords must be at least seven (7) characters in length and include at least one number and one capital letter.
5. Click .

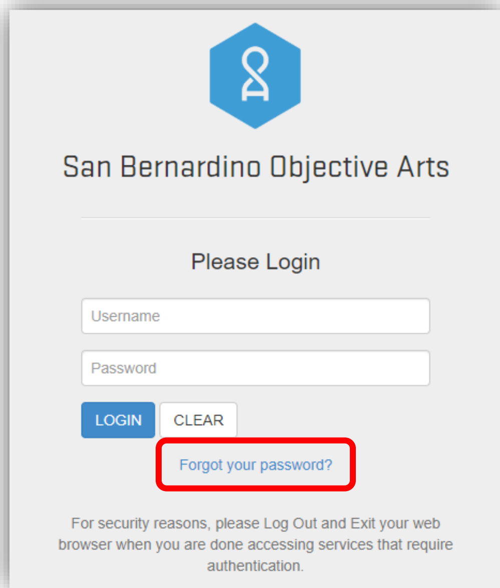
Resetting Your Forgotten Password

In order to reset your password, you will need to provide the username and email address linked to your account.

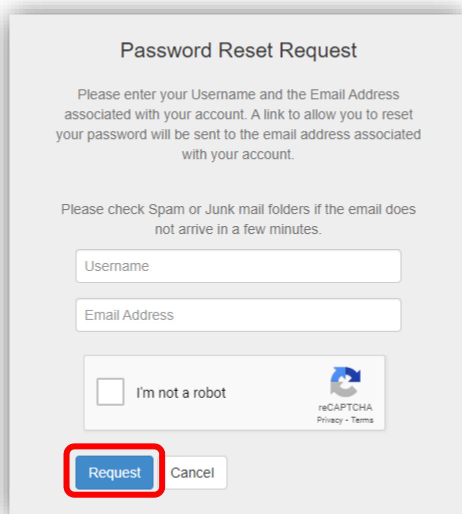
Note: If you no longer have access to the email address and/or forgot your username, then please contact your SME for assistance. They have the ability to reset your account for both the **TRAIN** and **LIVE** environments.

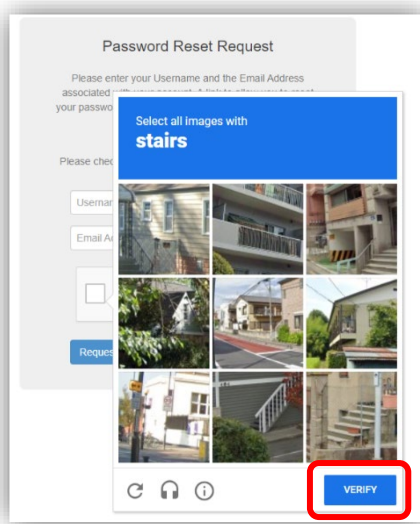
Password resets can be completed from the OA Login screen via the following steps:

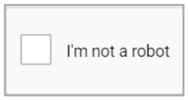
1. On the Log-on screen, click the **Forgot your password?** button.



2. This will take you to the Password Reset Request page.





- Enter your username and email address associated with the account.
- Check off the 

box. Complete the CAPTCHA prompt as requested. Once completed, click **Verify**.
- Once all the fields have been completed, click on the **Request** button to submit.
- You will receive an email with a link allowing you to reset the password to your account.

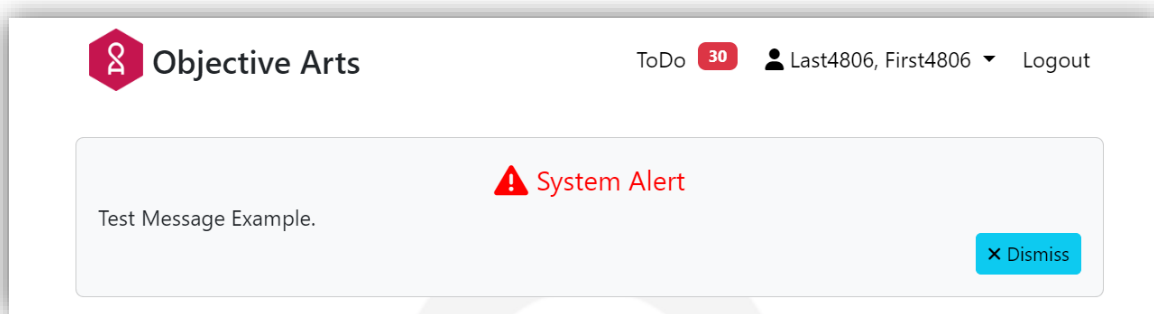
3. Update your password as instructed in the email.
4. Verify you are able to log in to OA. Return to the **Home Screen**.

Note: If you have any problems with the above steps, please contact your SME for further assistance.

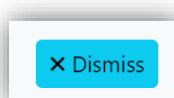
System Messages

Since there may be occasional scheduled system updates or changes made to the OA site, there is a need to communicate with users about these updates and how it may affect their experience before, during, and after the updates/changes are implemented. These notifications will be shared with users in the form of a pop-up screen on their OA home page.

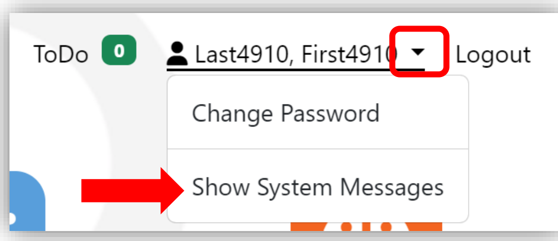
1. Upon logging into the system, if there is a notification available, a banner will pop up in the top center of the screen.



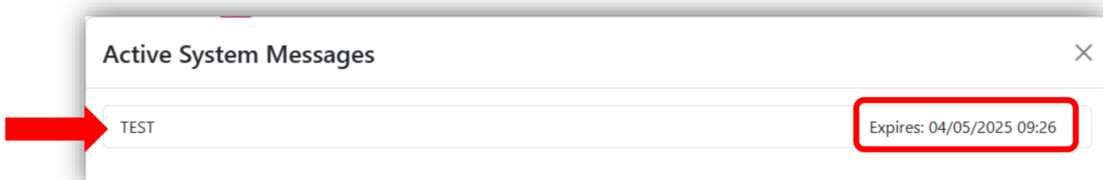
2. After reading the message, you can dismiss it. Messages will only be active for a limited period of time (anywhere between 1 hour and 30 days, depending on settings created by the administrator).



3. If you would like to review the message again, or access any other active messages, click the arrow next to your username on the top right and select "**Show System Messages**" from the drop down.



4. A pop-up window will open with a list of currently active messages and their dates of expiration.

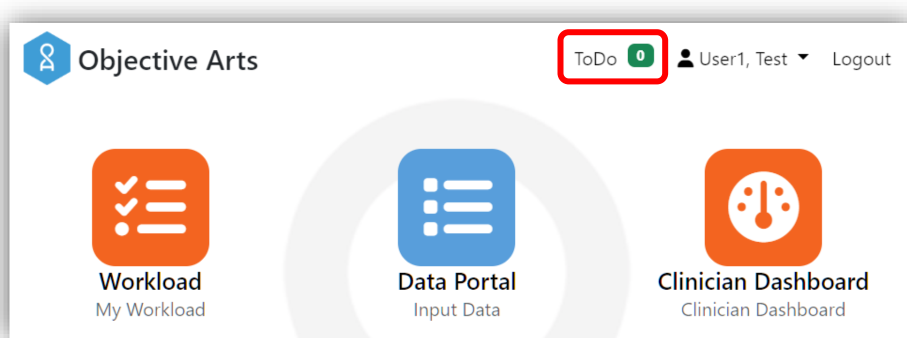


To Do List

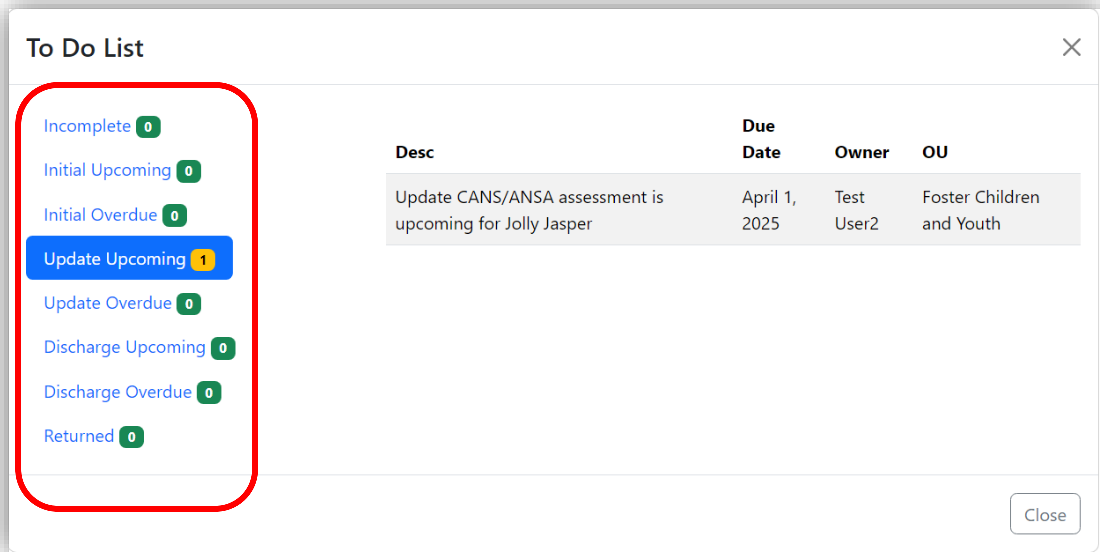
To Do Lists function as your OA inbox of notifications, keeping you aware of the assessments that are incomplete, upcoming, overdue, returned, or pending approval (*if you are a clinical supervisor*).

Note: The following screens may differ based on your current permissions.

1. From the **Home screen**, click **To Do** on the top right-hand side.



2. The following window will open up:

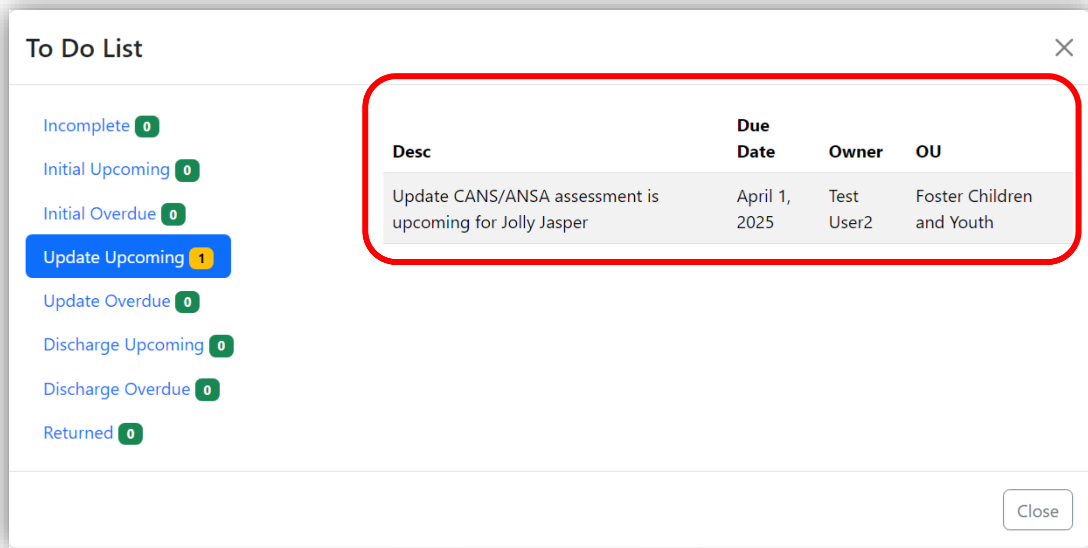


To Do List Window.

To Do List Terminology

Initial Upcoming	Lists the Initial assessments due within 30 days.
Initial Overdue	Lists the Initial assessments that are overdue.
Update Upcoming	Lists the Update assessments due within 30 days.
Update Overdue	Lists the assessments 90 days or more overdue.
Discharge Overdue	Lists the outstanding Discharge assessments for which you, in the OA Clinical Staff role, are responsible. If you are in the OA role of Supervisor or above, you will see the outstanding Discharge assessments for all the Clinical Staff in the RU(s) for which you are responsible.
Returned	Lists the assessments returned to the Clinical Staff by the Supervisor.
Pending Approval	For OA roles of Supervisor and above, lists the assessments submitted by Clinical staff, awaiting approval.

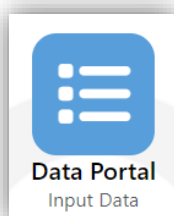
3. Click on a client description (**Desc**) and the assessment will open. You will then be able to create, edit, submit, or approve the assessment.

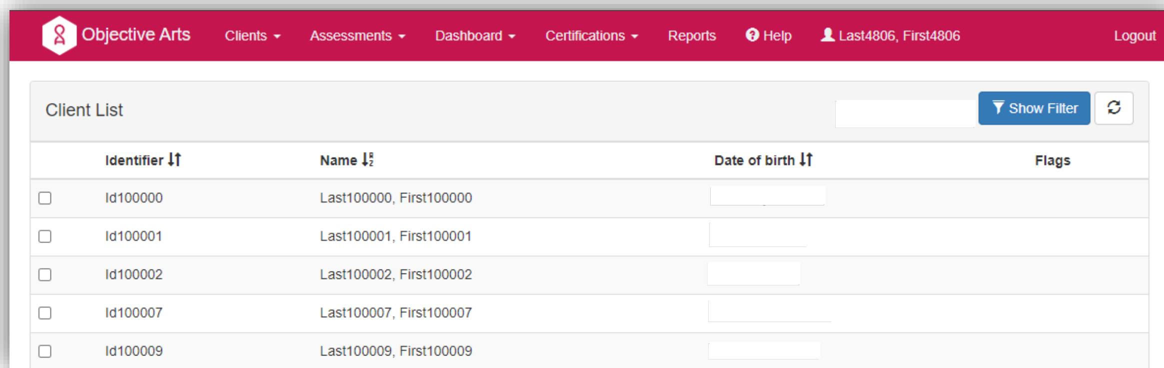


Data Portal

The **Data Portal** is a page in the OA website where you can view clients known to your organization, known as the Client List. It also offers a way to navigate to other useful pages via the Data Toolbar.

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





Also referred to as the Client List.

Note: In order to safeguard client information, the above screenshot is from the Training Site (TRAIN). The Production (LIVE) website will contain a blue banner, as shown below *(see page 4 for additional information)*.

The Data Portal Toolbar in Production (LIVE).

Data Portal Toolbar Overview

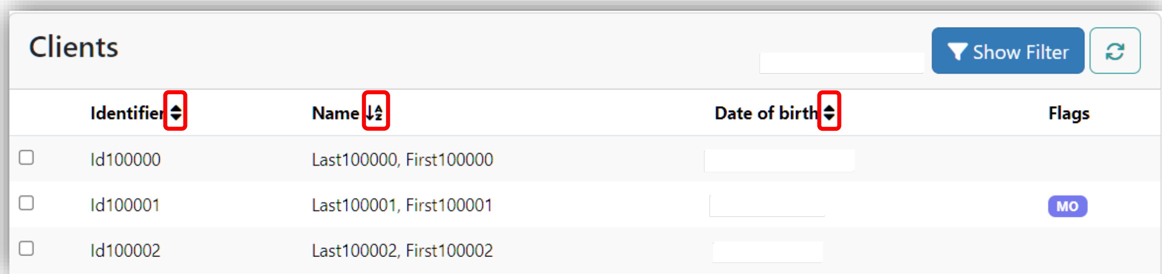
Objective Arts (Home)	Allows you to return to the Home Screen.
Clients	Allows you to navigate to the Client List or Client Workload pages.
Assessments	Allows you to navigate to the Assessments List, Approve (*clinical supervisors only*), My in progress, and My returned pages.
Dashboard	Allows you to navigate to your individual Clinician Workload and Reporting Unit dashboards.
Certifications	Allows you to import your CANS/ANSA certifications from Schoox.
Reports	Opens the Reports page, where you can view, generate, and run reports about your Reporting Unit or Organization Unit.
Help	Opens the Objective Arts Wiki in a new tab.
Logout	Allows you to end your session securely.

CLIENTS

Client List

This page is a list of clients who share an active placement with your assigned RU(s).

1. Use the arrows next to each column name to sort the list by:
- Unique ID (*lowest to highest* OR *highest to lowest*),
- Name (*alphabetically A to Z or Z to A*), OR
- Date of birth (*oldest to youngest* OR *youngest to oldest*).

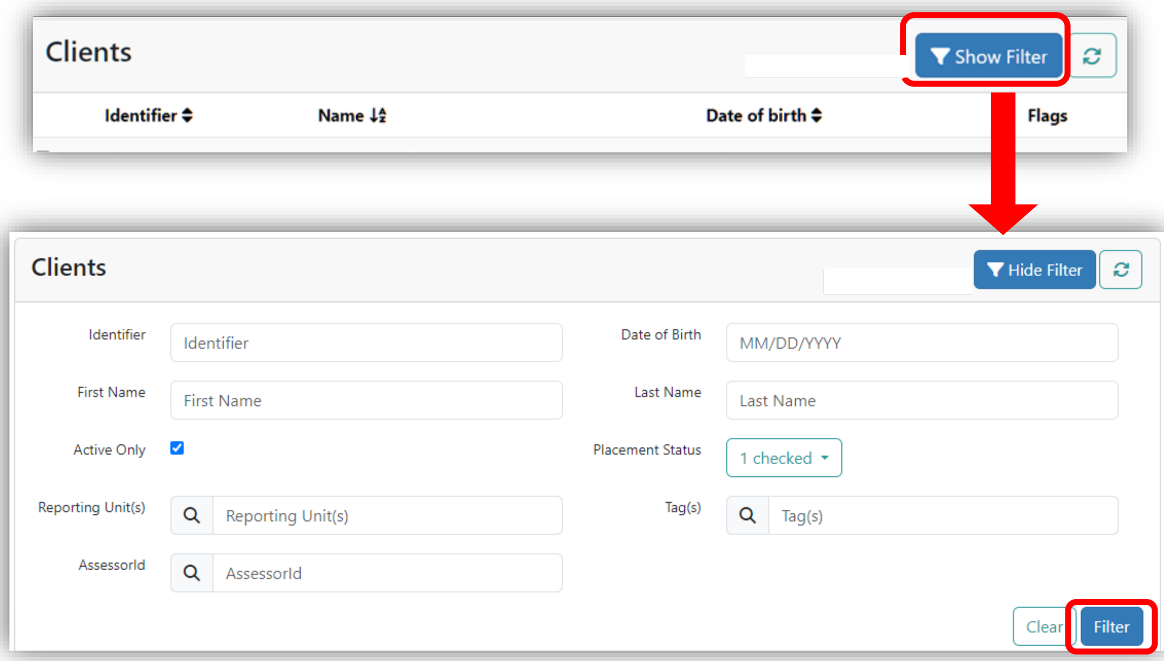


Client List.

Note: Every hour, OA is updated with new client and program assignment information. Each update brings in new or changed data from myAvatar. If new clients fail to add to your workload, then you can manually add them via the Client List. Please refer to the *Adding Clients to your Workload* section on page 20 for step-by-step instructions on how to complete this.

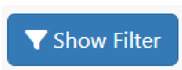
Filtering the Clients List

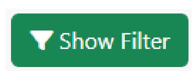
1. Click the blue **Show Filter** button at the top right of the screen to open the filter menu.



Opened filter menu.

2. Once you have entered your search parameter(s), click **Filter** or press **Enter** to apply your filter settings to the Clients List.

When a filter is active, the 

button turns green: 

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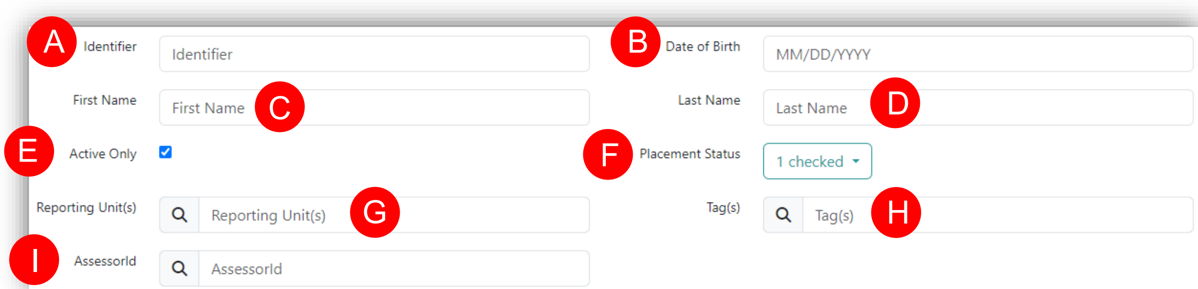
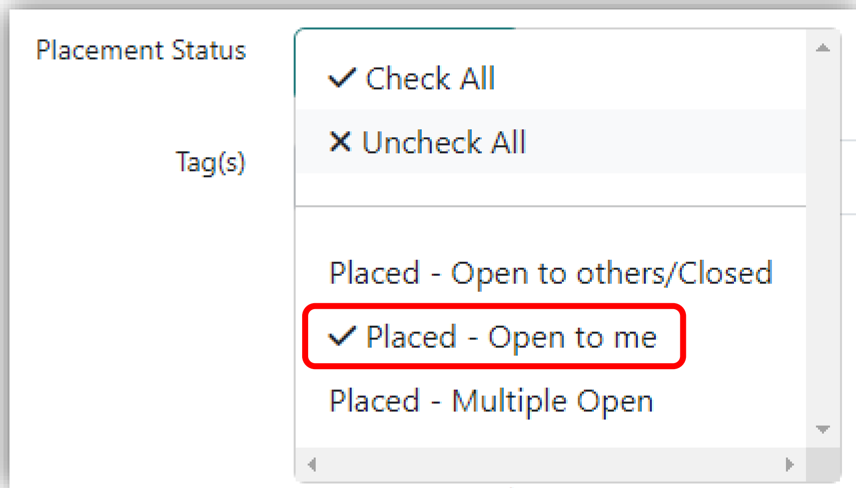
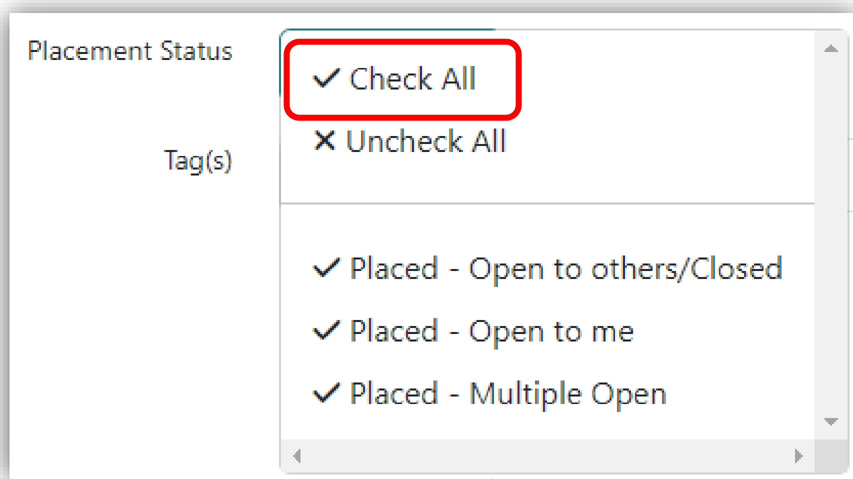
Client List Filter Menu

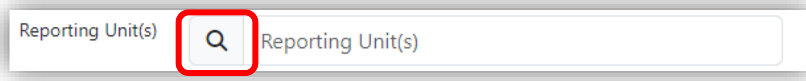


A. Identifier	Filter by client number or unique ID *(e.g. "1234567").*
B. Date of Birth	Filter by a specific date of birth *(e.g. "03/14/2015").*

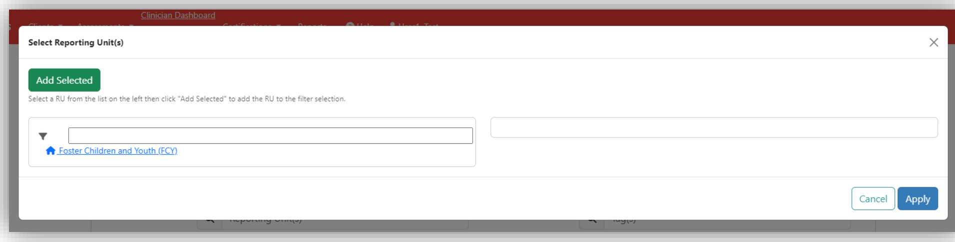
C. First Name	Filter by a client's first name. *Partial information may be used.*
D. Last Name	Filter by a client's last name. *Partial information may be used.*
E. Active Only	By default, this field is checked and will only return active clients. When unchecked, the list will include both active and inactive clients.
F. Placement Status	By default, **Placed – Open to me** is checked.  Additional options include **Placed – Open to others/Closed** and **Placed – Multiple Open.** Select any of these additional options or select **Check All** to include these placement statuses. 

<table>
<tr>
<td>G. Reporting Unit</td>
<td>
Filter clients by one or more reporting units (RU).

To Filter by RU: Click the magnifying glass.

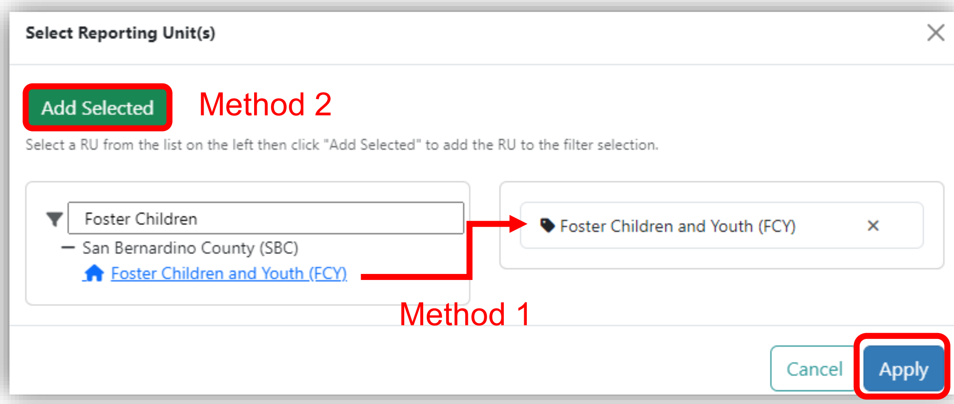


A window for the reporting unit filter will appear.



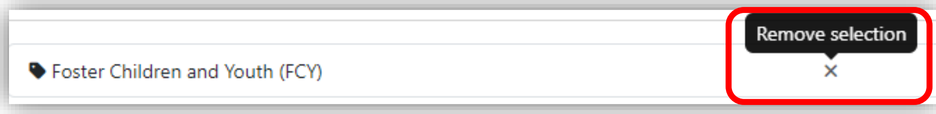
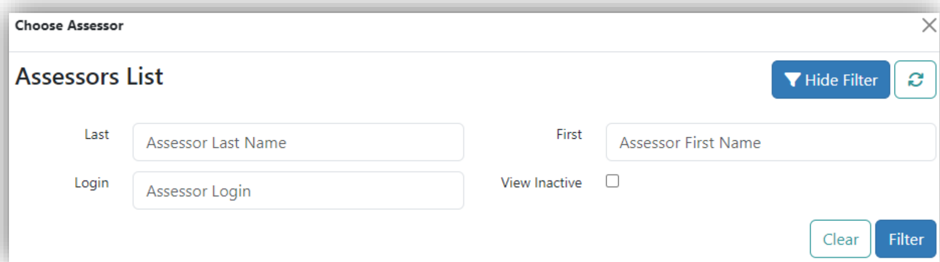
If you are assigned more than one RU, then the +/- icons allow you to expand or collapse the list.

There are two methods to add RU's to your filter:



Method #1: "Drag and Drop" – Click the RU you want to filter by and "drag and drop" it into the empty white box to the right of the RU list. You can drag more than one RU into this box. Once you've made your selections, click Apply. This is the preferred method.

Method #2: "Add Selected" – Click the RU you want to filter by and click on "Add Selected" button. Once desired RU's have been added, click Apply.
</td>
</tr>
</table>

	To remove an RU from the filter, click the "**X**" to the right of the RU. 
H. Tags	Select from a list of service and demographic identifiers.
I. Assessor ID	Opens the Assessors List where you can filter by a specific staff member from your program. *Partial information may be used.* 

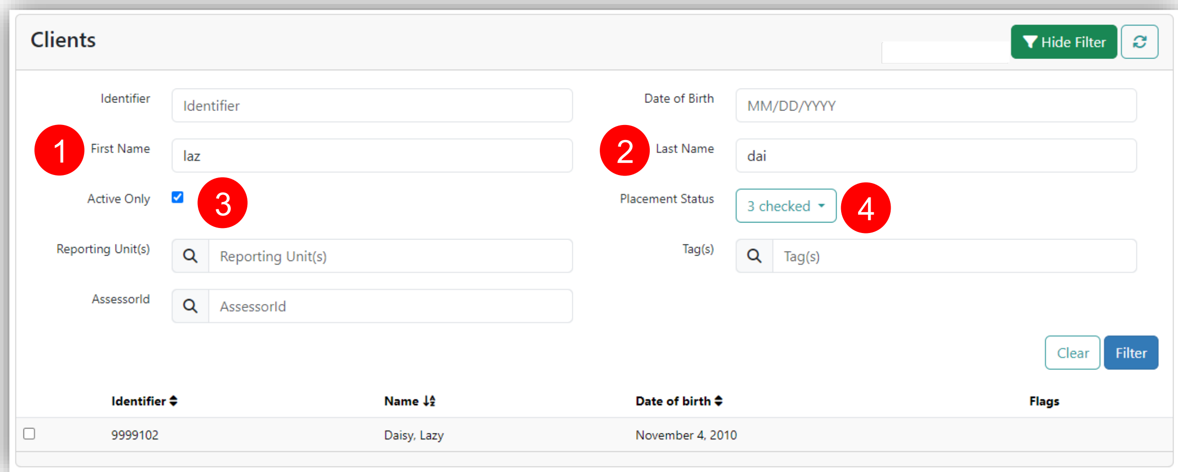
Additional Filter Features

- 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 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 been uploaded to the system since your last search with similar parameters.

Client Search Example for Lazy Daisy



Using partial client information is allowed:

1. First Name: **laz**
2. Last Name: **dai**

Expand your Clients List:

3. Uncheck the **Active Only** box
4. Placement Status – Select **Check All** to apply all placement status options.

Note: It is <u>NOT</u> necessary to enter information in all the search fields. You may enter as much or as little information in a manner that best serves your needs as search entries do not need to be complete IDs, numbers, or words.

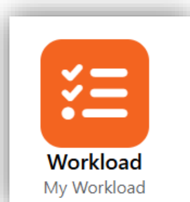
Viewing Your Client Workload

Your Client Workload can be accessed from various pages in the website:

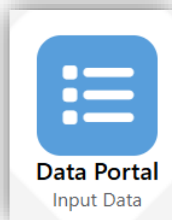
- Home Screen
- Data Portal Toolbar

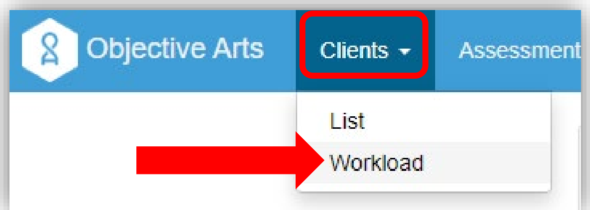
In the next example, we'll break down a way to view your workload from the home screen. The process is similar for other methods.

1. To easily view your workload, click **Workload** from the **Home screen**.



2. An alternative way to navigate to your workload is from the **Data Portal**. Click **Clients** from the toolbar to open the drop-down menu. Then, click **Workload**.



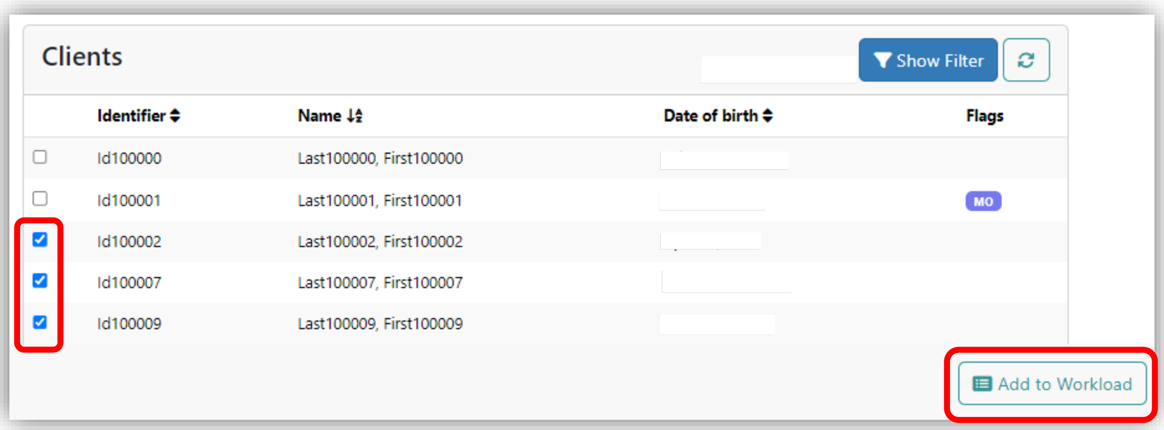


Your OA workload is populated based on the Clinician Field on the Program Assignment form in myAvatar. When a Program Assignment is closed in myAvatar, it will be removed from your OA workload.
However, there may be instances where this may not occur, such as:

- Clinician Handoff
- A Program Assignment wasn't updated to reflect the new clinician.

If this occurs, your clients can be added or removed from your workload manually.

Adding Clients to your Workload

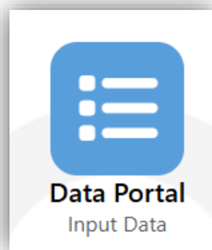


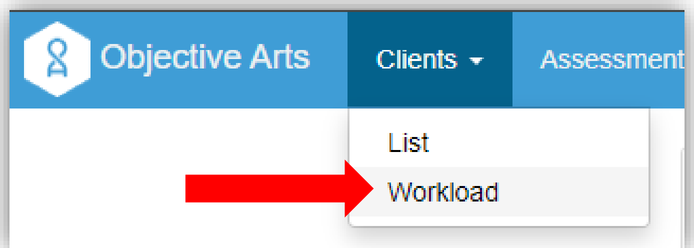
1. Navigate to the **Clients List.**
2. Check the boxes next to the Identifier of the clients you wish to add to your workload.
3. Click the **Add to Workload** button at the bottom right of the screen.

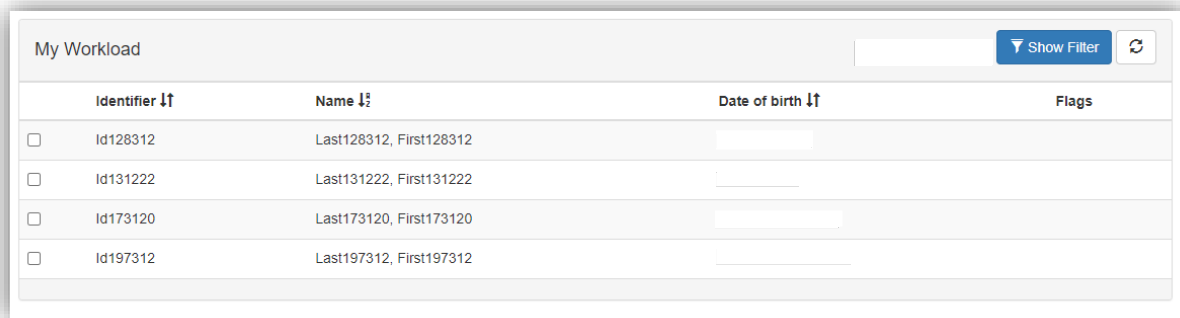
4. Confirmation message will appear on the top right hand corner confirming (or denying) the action was completed.

Removing a Client from Your Workload

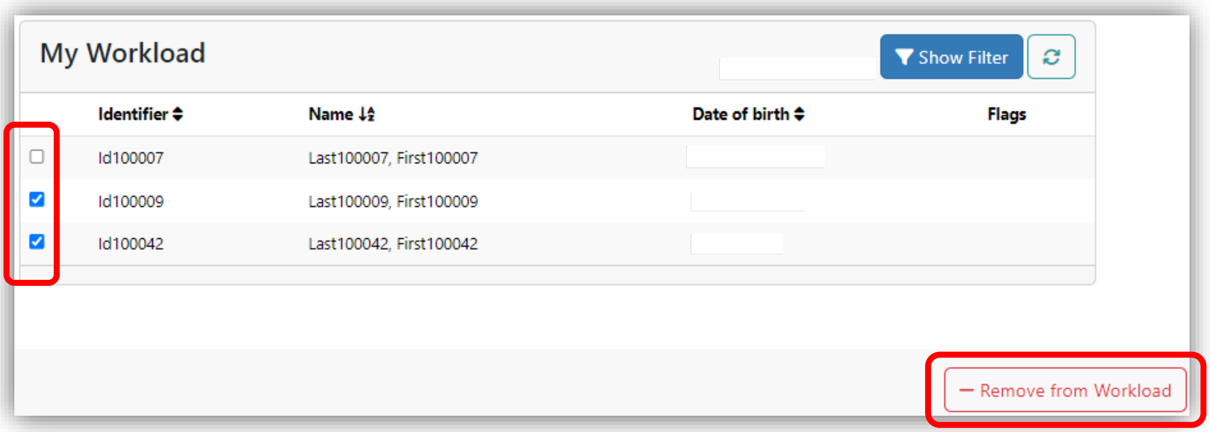
1. Navigate to the **Clients List**.
2. On the **Data Portal Toolbar**, click **Clients** and then **Workload** from the drop-down items.







3. Check the box(es) next to the identifier of the client(s) you are removing and click the **Remove from Workload** button at the bottom right of your screen.



4. Confirmation message will appear on the top right hand corner confirming (or denying) the action was completed.

Client Page

The Client Page displays a client's basic information and their historical assessment data. It is also a place where you can generate individual client reports, assessments, and forms.
The Client Page includes all the comprehensive details regarding the client.
It consists of four (4) main elements:

- An overview of client-related information
- A dashboard summarizing and illustrating past assessment data
- Open and Recently Closed Placements
- A tab for Assessments, Forms, and Contacts

The Client Page is composed of the Summary Dashboard, Open and Recently Closed Placements, and the Assessments, Forms, and Contacts Sections.

Note: In order to safeguard client information, certain screenshots may contain additional information that will be redacted. These will appear as blank spaces (*see page 4 for additional information)*.

Client Page Sections

A. General Information	This section is composed of: • Client's name, • Identifier number, • Date of birth, • Age, • Any active Intensive Care Coordination (ICC) Coordinator (if applicable), and • Other enrollments (if applicable).
B. Client Summary Dashboard	Provides scores, alerts, and graphical data for the client's most recent assessments. For additional information, please see the *Client Summary Dashboard section* on page 60.
C. Open and Recently Closed Placements	Lists any active/open or recently closed program placements by Reporting Unit. Includes: • Responsible User contact information, and • Open and closed placement dates.
D. Assessment List, Forms, and Contacts	Each tab lists all the client's assessments, forms, and contacts (including ICC coordinators).

Designating an ICC Coordinator

An **Intensive Care Coordination (ICC) Coordinator** is a care coordinator that helps to develop and implement the client plan and is responsible for supporting children and their families in attaining their goals.

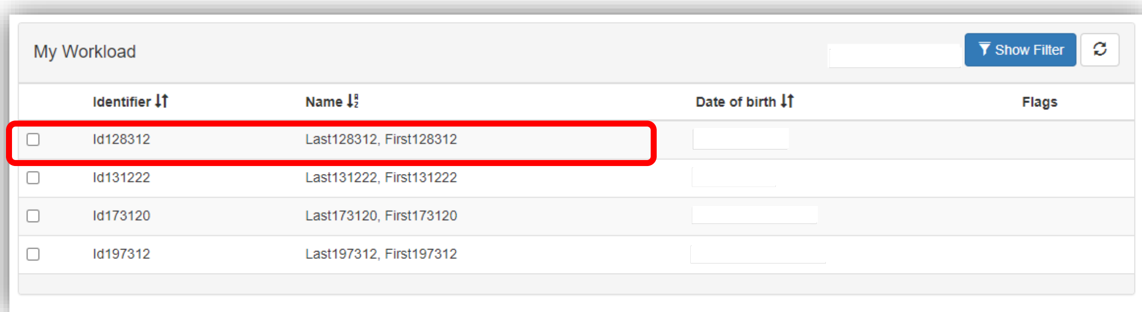
ICC Coordinators:

- Ensure that medically necessary services are accessed, coordinated, and delivered in a strength-based, individualized, client-driven, and culturally and linguistically competent manner.
- Ensure that services and supports are guided by the needs of the child.
- Facilitates a collaborative relationship among the child, their family, and systems involved in providing services to them.
- Supports the parent or caregiver in meeting their child's needs.
- Helps establish the Child Family Team (CFT) and provides ongoing support.
- Organizes and matches care across providers and child serving systems to allow the child to be served in their community.

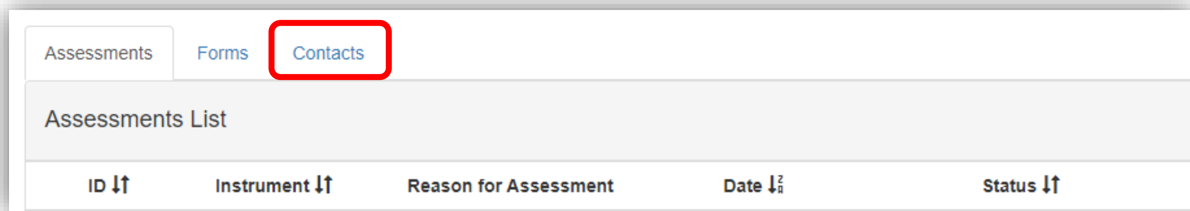
(Source : DHCS Specialty Mental Health Services for Children and Youth)

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

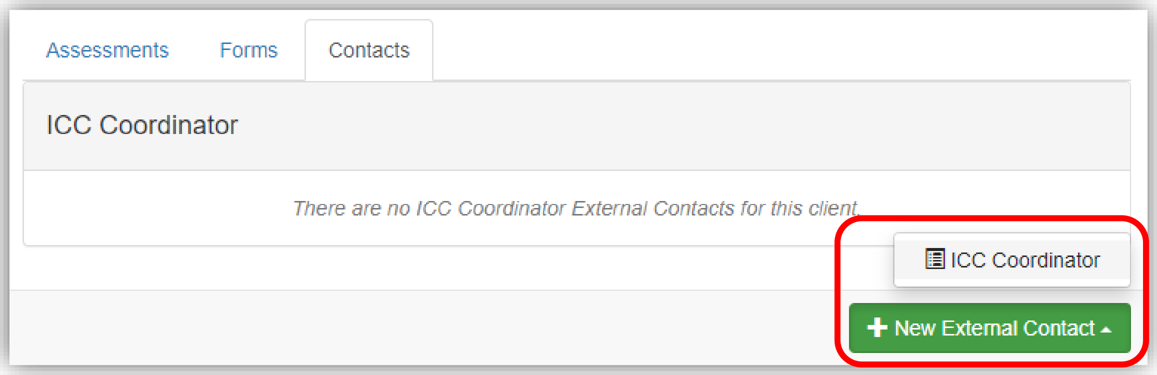
2. Select (click) the client to open their **Client Page**.



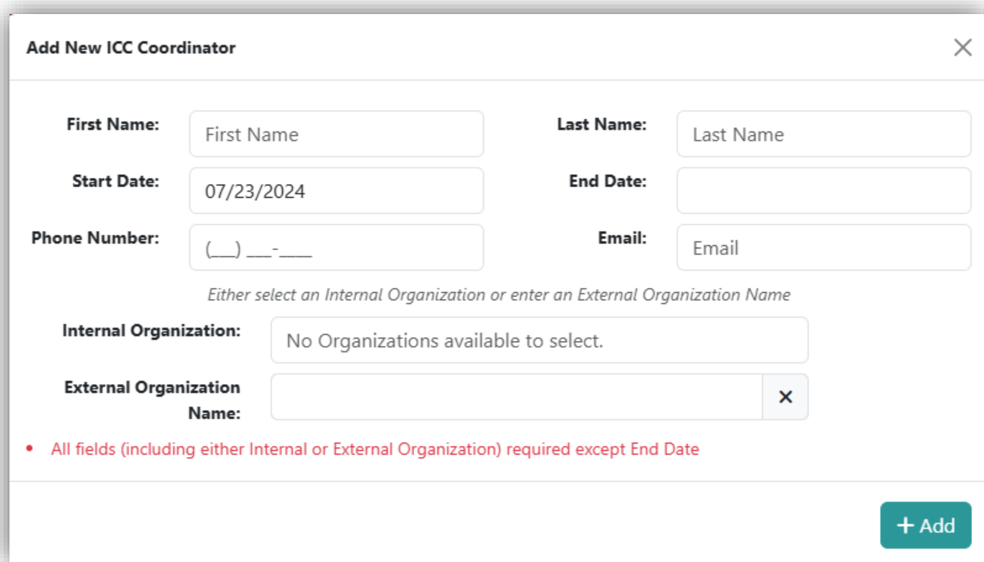
3. Scroll down to the **Assessment, Forms, and Contacts** section. Then select the **Contacts** tab.



4. Click the **New External Contact** button located on the bottom right of the screen to add a new ICC Coordinator. Select **ICC Coordinator**.

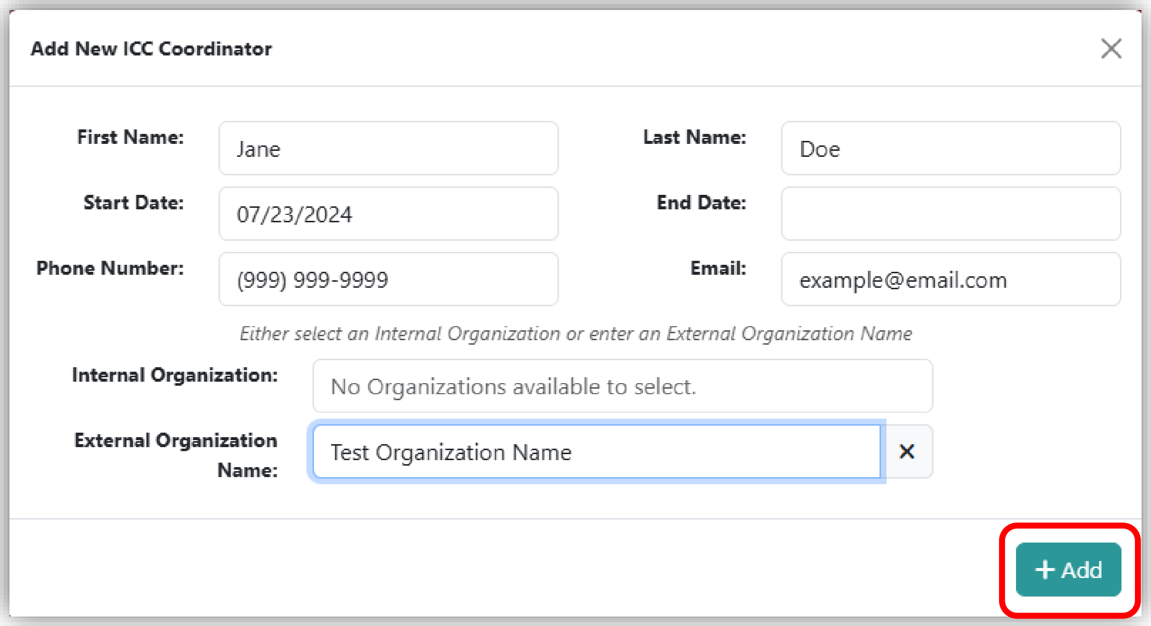


5. Enter the ICC Coordinator's information in the new window. All fields are required, except for the **End Date**.

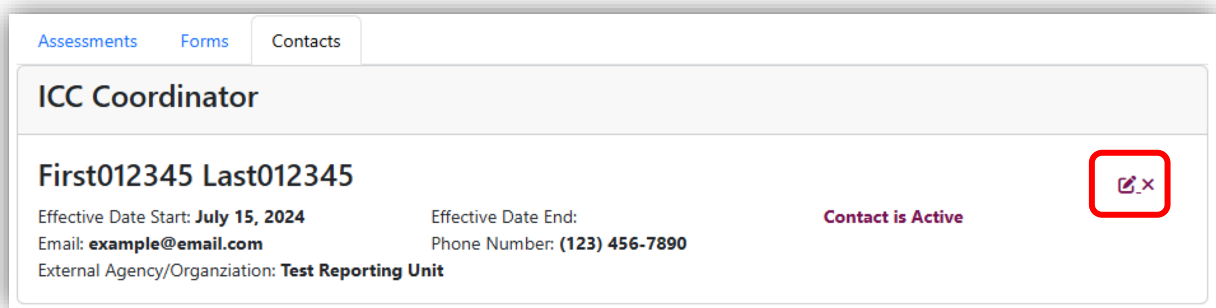


Note: The coordinator can only be associated by either their **Internal Organization** (selecting from the client's open placement) *OR* their **External Organization Name** (typing in the Organization name manually).

6. Once all the fields are entered, select the **Add** button located on the bottom right of that window. The new ICC Coordinator has now been linked to the client.

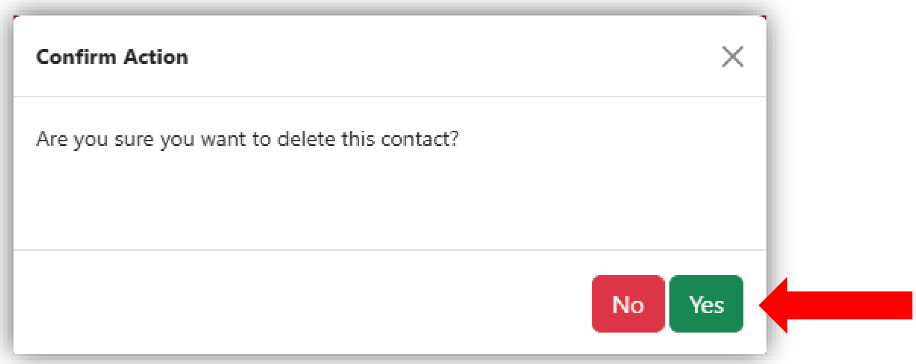


7. To edit the ICC Coordinator, click the **Pencil and Clipboard** button (next to the **X**). This will open the edit window.



- **Contact is Active:** A contact is considered active when the "Effective Date End" is blank. The Effective Dates cannot overlap between prior and current coordinators. Ensure the end date of the prior coordinator ends before the start date of the current/new coordinator.

8. To remove an ICC Coordinator, click the "**X**" in that section. A confirmation action window will appear asking if you want to delete this contact. Select **Yes** to delete the contact.



ASSESSMENTS

Accessing an Assessment

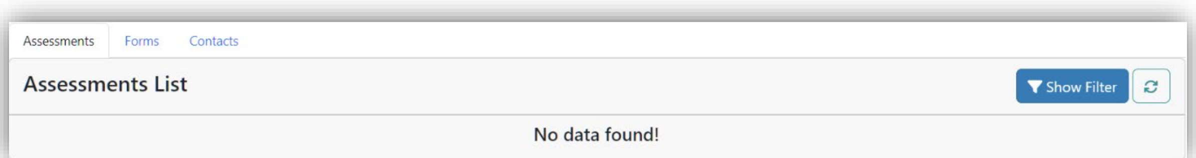
If you are to complete direct entry into OA for assessments, based on your organizations requirements, a Client's assessment can be accessed via the:

- Client page, or
- Assessment List

Note: Client Page *(on page 22)* shows you how to navigate to this page.

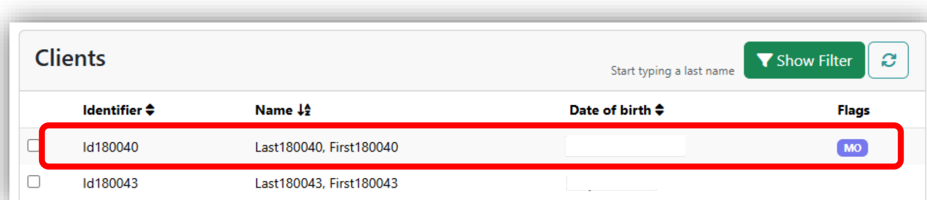
<u>To access an assessment via the Client's page:</u>

1. From the **Clients List** on the **Data Portal Toolbar**, 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 them, there will be a list of those assessments. 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 show "No data found!".

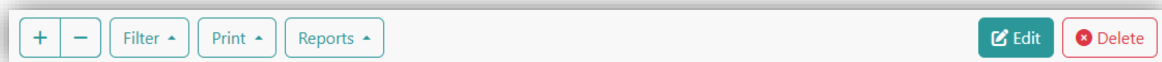


The Assessments List can be sorted and filtered.

3. To open an assessment once it is located, click on the row of the assessment.

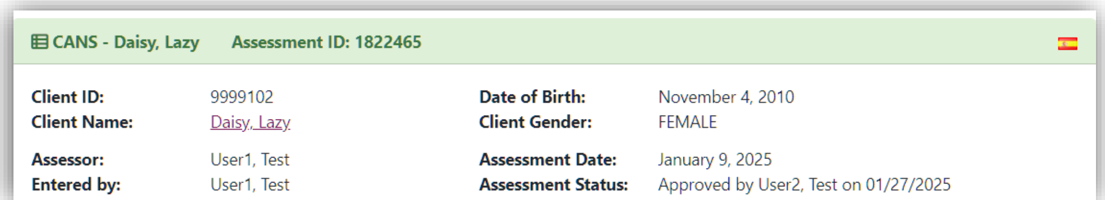


- Depending on the assessment's status (*assigned, submitted* or *approved*) and your permission levels, you may be able to review, edit, submit, print, or delete the assessment. You can also access other functions on the toolbar along the bottom of your screen.



- If an assessment is in the assigned or submitted status, the header bar of the assessment will be blue.

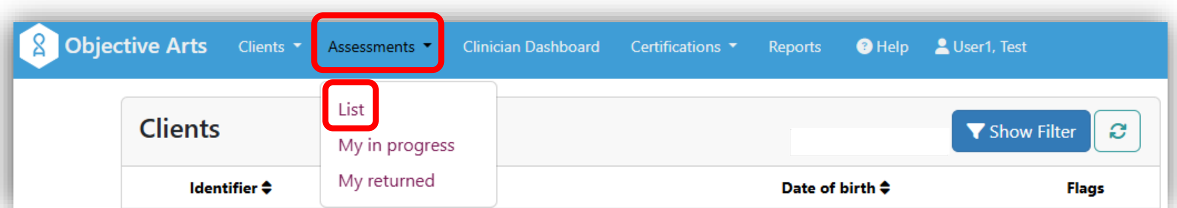
- If an assessment has been approved, the header bar of the assessment will change to green.



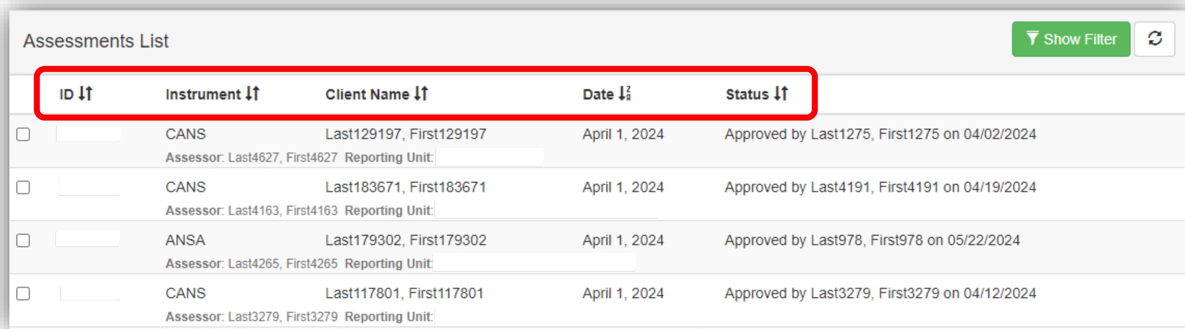
Assessment List

<u>To access an assessment via the Assessment List:</u>

1. From the **Home screen**, click **Workload** or **Data Portal**.
2. From the **Data Portal Toolbar**, click the **Assessments** option from the top Menu Bar and select **List** from the drop-down menu.



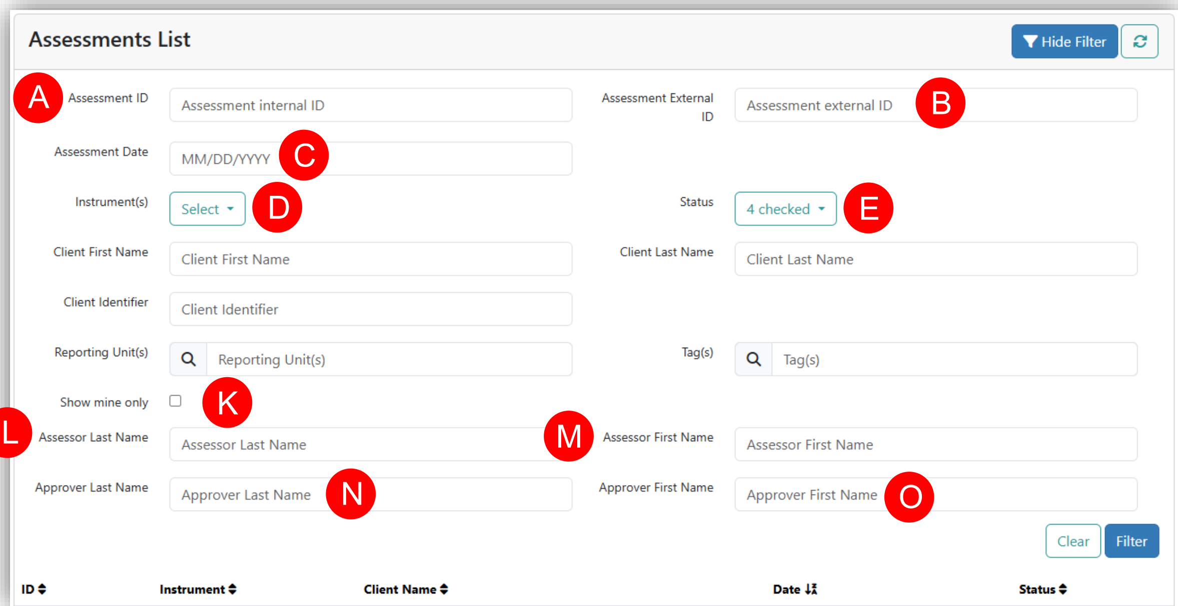
3. To navigate through the assessments, click on the category (or arrow adjacent to it) to sort the set by **ID**, **Instrument**, **Client Name**, **Date**, and/or **Status**.



Assessments List Sorting Options

ID	The assessment ID.
Instrument	The type of assessment completed for the client. **Note:** You may see assessment types other than CANS/ANSA. These assessments are used by specific programs and are not covered in this manual.
Client Name	Lists the client's name alphabetically *(e.g. A-Z or Z-A).*
Date	By default, the list is sorted newest to oldest assessment completed.
Status	The completion status of the assessment *(e.g., assigned, submitted or approved).*

Assessments List Filter Menu



A. Assessment ID	Filter by assessment identifier.
B. Assessment External ID	Filter by the assessment's external identifier tied to San Bernardino county's Electronic Health Record (EHR), myAvatar.
C. Assessment Date	Filter by the date of the assessment.
D. Instrument(s)	Select from a list of available assessment instruments. *(e.g. CANS, ANSA, PSC-35, etc.)*
E. Status	Select from a list of assessment status: • Assigned, • Submitted, • Approved, • Returned, or • Deleted.
F. Client First Name*	Filter by a client's first name. *Partial information may be used.*
G. Client Last Name*	Filter by a client's last name. *Partial information may be used.*
H. Client Identifier*	Filter by client number or unique ID. *(e.g. "1234567")*
I. Reporting Unit*	Filter clients by one or more reporting units.
J. Tags*	Select from a list of service and demographic identifiers.

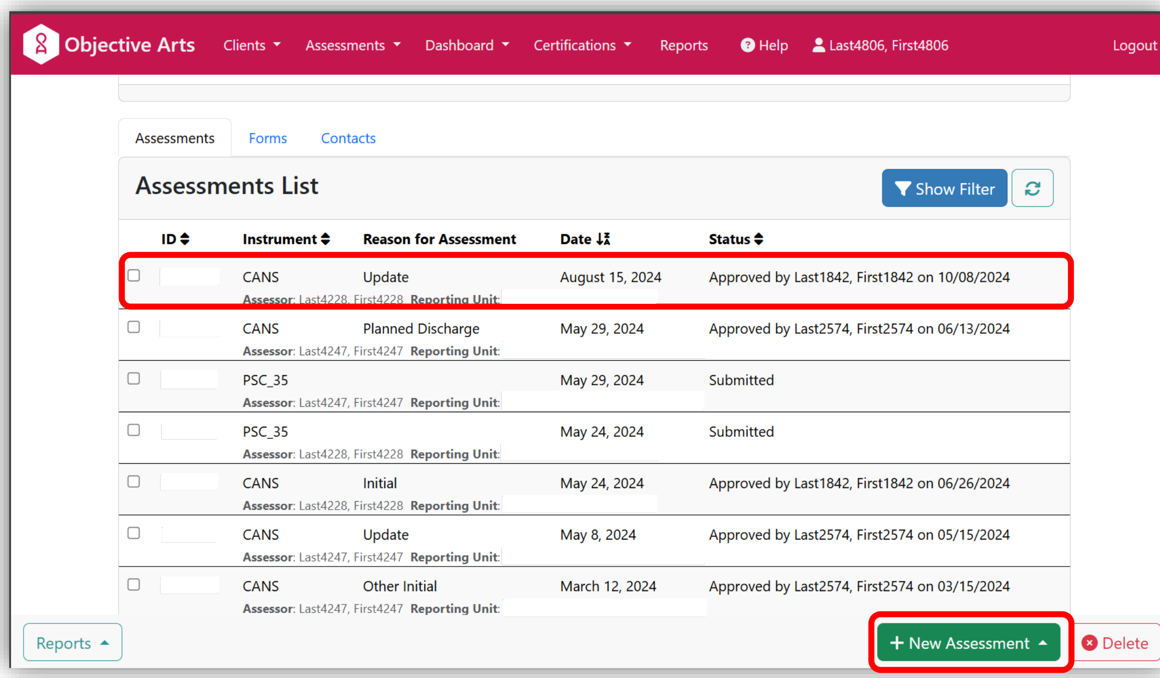
K. Show Mine Only	Filter the assessment list to only show assessments completed by you as the assessor.
L. Assessor Last Name	Filter by the assessor's last name. *The Assessor refers to the clinician who conducted the assessment.*
M. Assessor First Name	Filter by the assessor's first name. *The Assessor refers to the clinician who conducted the assessment.*
N. Approver Last Name	Filter by the approver's last name. *The Approver refers to the supervisor who approved the assessment, if applicable.*
O. Approver First Name	Filter by the approver's first name. *The Approver refers to the supervisor who approved the assessment, if applicable.*

*See the *Client List Filter Menu* on page 14 for additional filter options for clients.

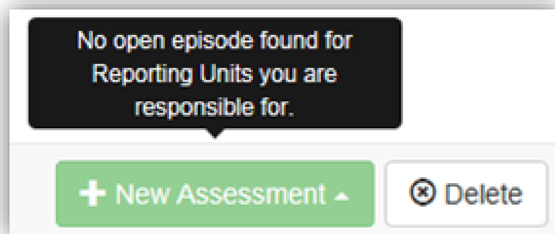
Note: If your search parameters do not match any assessments, then the list will return no results and display "No data found!"

Creating a New Assessment

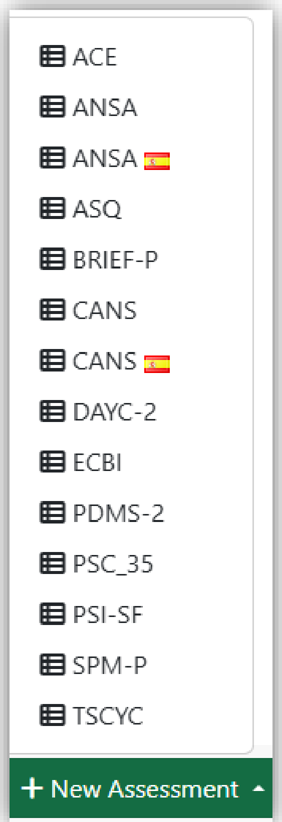
1. From the **Home screen**, click **Workload** or **Data Portal**.
2. Click on the client's name to open their **Client Page**.
3. Scroll down to their **Assessments List**, click the green **+ New Assessment** button at the bottom right of the screen.



Note: The New Assessment button will not be available for use if the client is not active/open to your assigned placements in OA. If you hover over the New Assessment button, you will receive the following message:

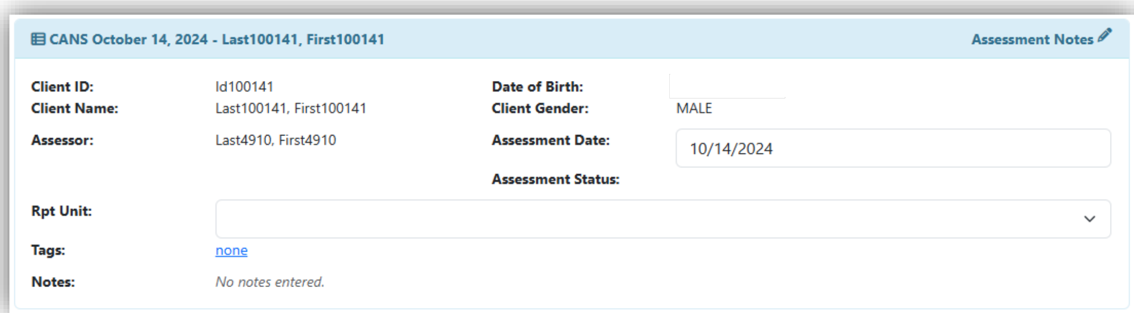


4. Upon clicking the **New Assessment** button, select from the list of available assessments.



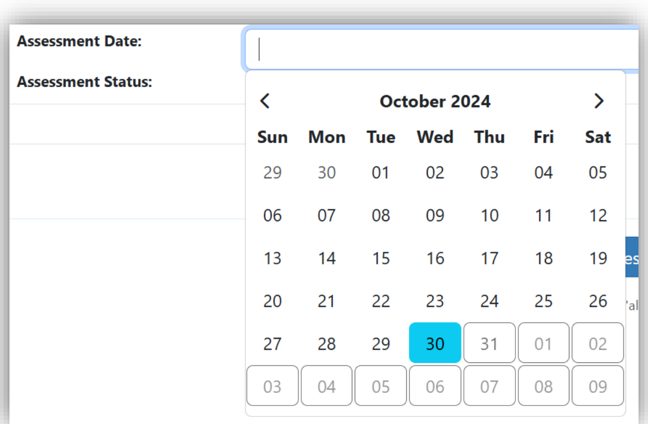
- As seen above, there are several assessments to choose from. In this section the CANS is used as an example on how to complete an assessment. The skills/practices learned here are similarly applied to all assessments.
- Please refer to your supervisor for additional information on how to complete specific assessments.

5. After selecting the assessment type, the General Information page of the assessment will display. This page includes the **Client ID Number**, **Client Name**, **Date of Birth**, and **Client Gender**. Please ensure that the items listed are correct for the client that is being assessed.



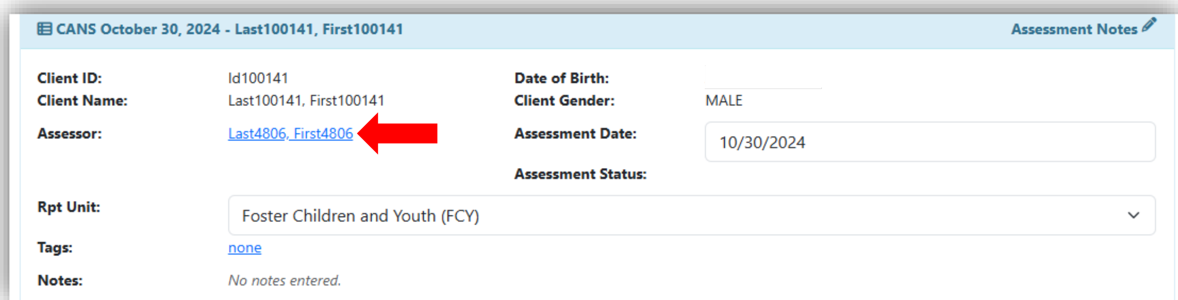
- **Assessment ID:** The Assessment ID will auto-generate once the assessment has been saved.

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



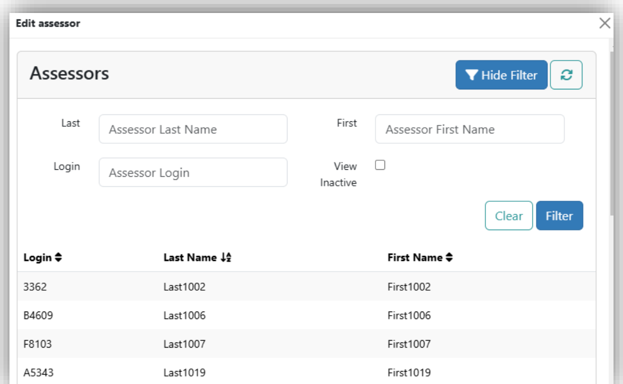
- **Assessment Date:** This field opens the calendar to today's date. If today's date is not the date of the client's assessment, be sure to change this date to the correct date of assessment. The assessment date <u>is the date that the assessment was performed</u>, not the date that the assessment is entered into the system.

7. If the Assessor listed needs to be changed, then click on the name that is in the Assessor field. This will open the Edit assessor dialog box.

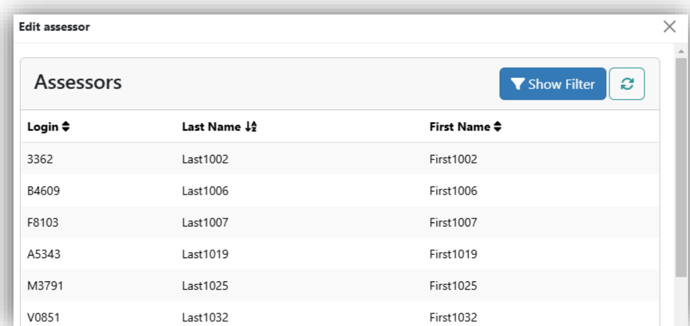


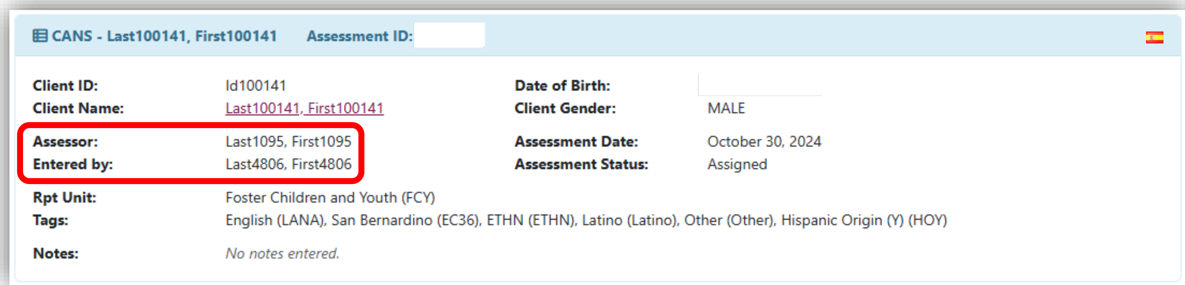
- **Assessor:** This field must reflect <u>the clinician who conducted the assessment</u>, not the person entering the data.

8. The list can be filtered by one or more fields. Click **Show Filter** and choose from the available options.



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

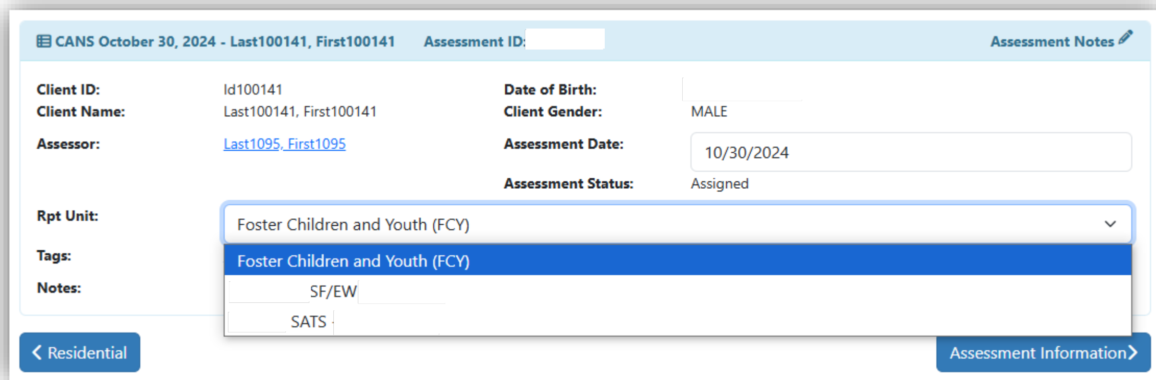




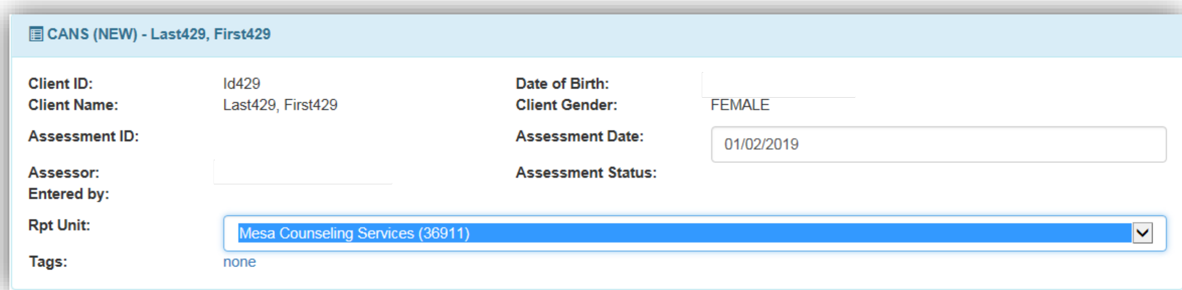
Note the change in the assessor's name.

- **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 and the assessor is placed in the same two or more RUs, the Rpt Unit field will be blank. If this field is blank, the correct RU must be selected.

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



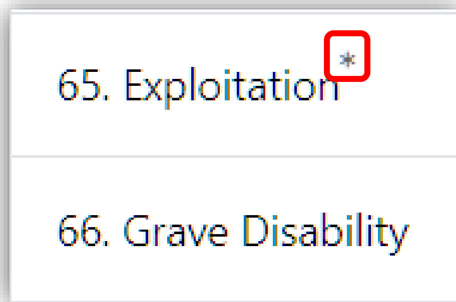
11. Select the correct RU.



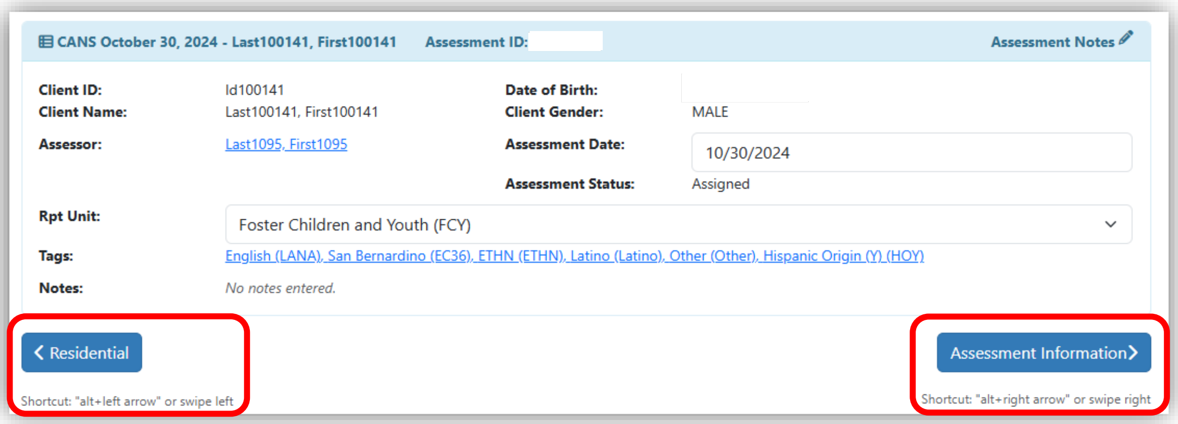
Note: A reporting unit must be selected in order to save and submit the assessment for approval.

Assessment Data Entry

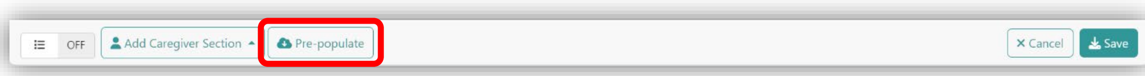
As you enter data in your assessment, please be sure to answer any fields marked with an asterisk (*). These fields are mandatory and must be completed.



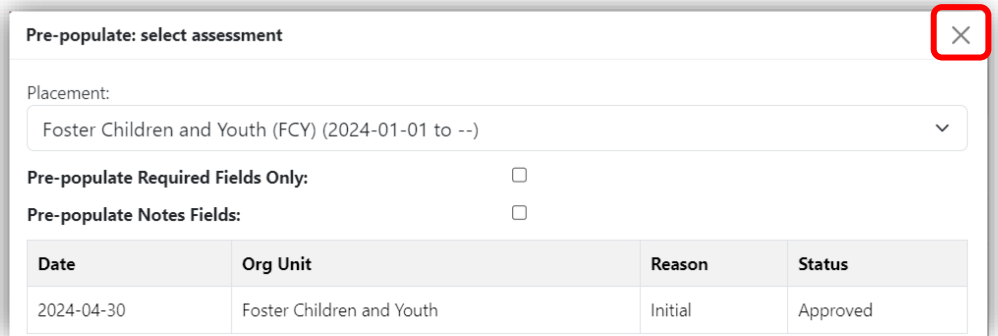
1. Click on the **blue routing** buttons to navigate across neighboring sections of the assessment.



2. Prior approved assessments may be used to pre-populate an assessment quickly. To do so, you can use the **Pre-Populate** button, located on the toolbar at the bottom right of your screen.

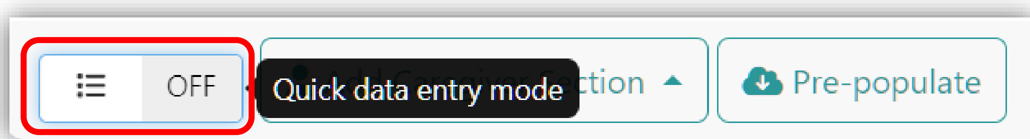


- If there are approved assessments in OA for this client, a list of assessments will appear from which you can choose to pre-populate your assessment.

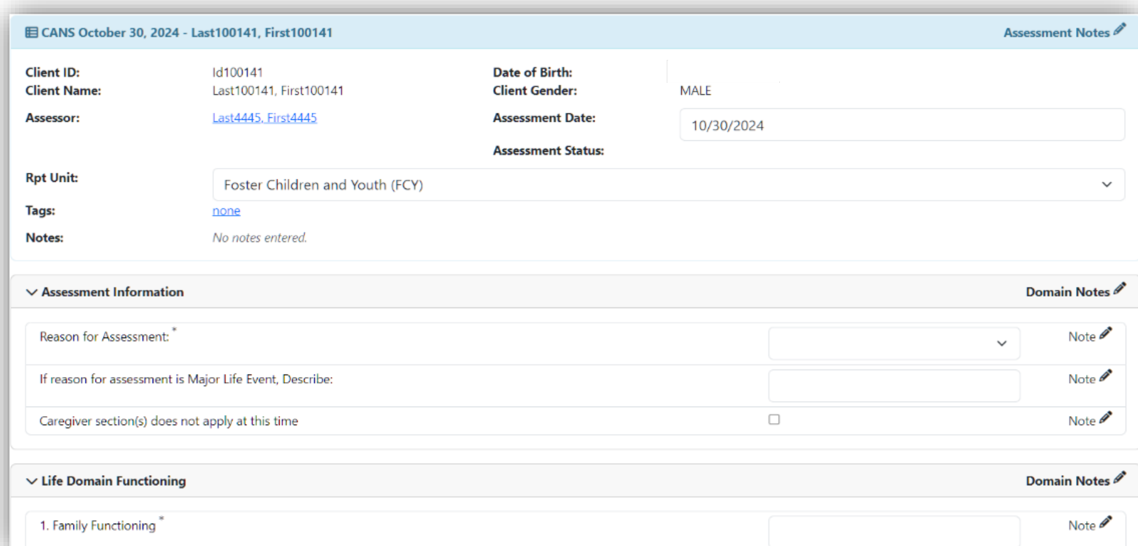


Note: The approved assessments listed for the client may not be assessments completed by you or your program. If this is the case, you can dismiss this option by selecting the "**X**" in the top, right corner.

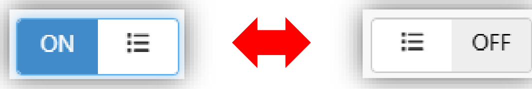
3. You also have the option to toggle on the **Quick data entry mode**. This option button is located at the bottom left of each screen:



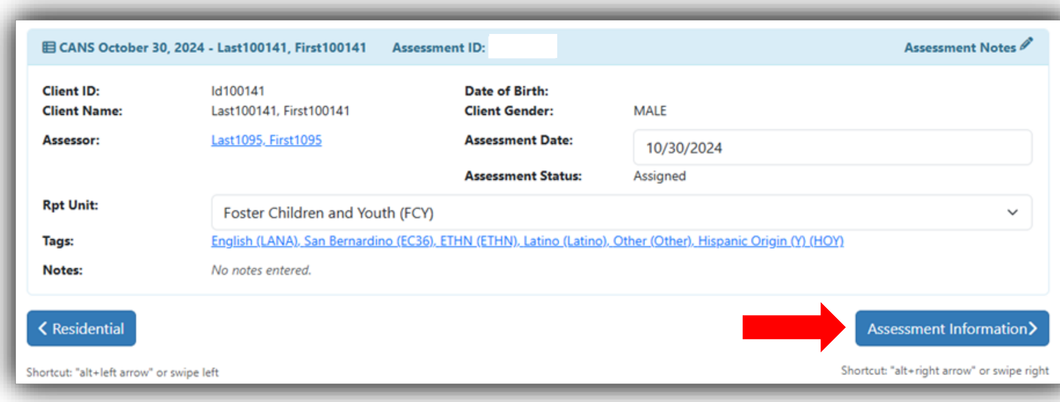
- If you choose to utilize **Quick data entry mode**, a screen will appear where each domain and module can be seen on the same page. In this mode, you will tab through the page to complete the assessment fields, instead of navigating through separate screens.



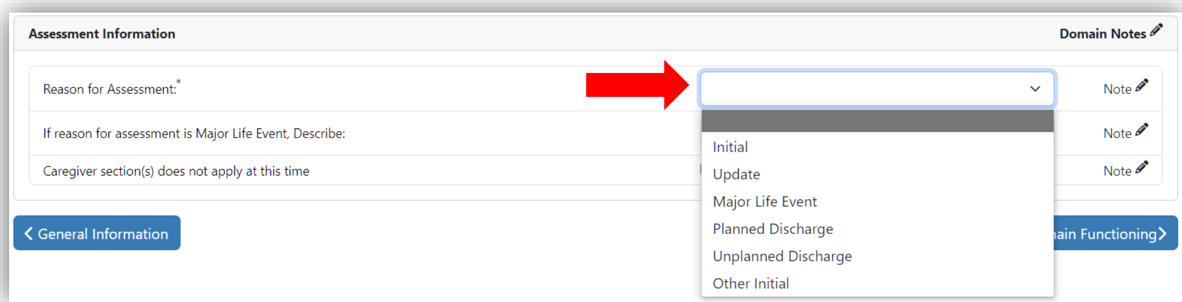
- To turn off the **Quick data entry mode**, click the same button. You can toggle between the two modes to find what works best for you.



4. To continue through the assessment, click the **Assessment Information** button.

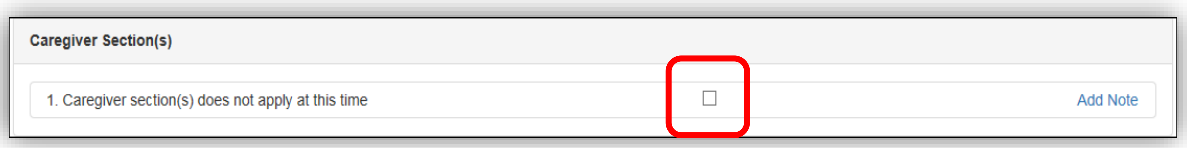


5. Enter a **Reason for Assessment**.



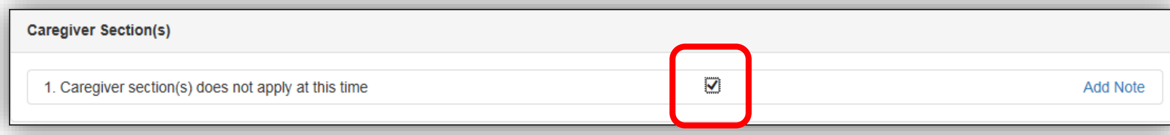
6. Click **Caregiver Section**(s). This section states, "The Caregiver Section(s) does not apply at this time".

- If you <u>WILL be completing caregiver information</u> for the assessment, leave this box **unchecked**:



Entering Caregiver information = Leave box unchecked.

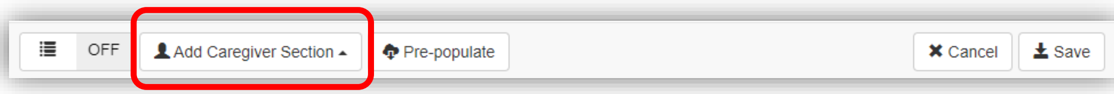
- If you <u>WILL NOT be entering caregiver information</u> for the assessment, **check the box.** If you do not check this box, caregiver information WILL be required:



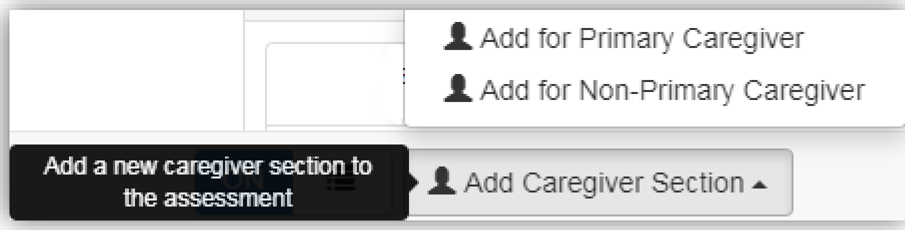
No caregiver information = check the box.

Note: Adding only a Non-Primary Caregiver while the box is left unchecked will result in a validation error. A Primary Caregiver is <u>required</u> to fulfill the caregiver information section.

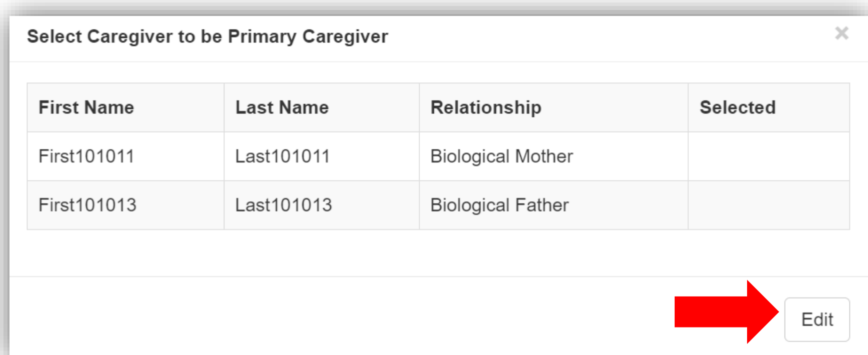
7. Add caregiver information by clicking the **Add Caregiver Section** located on the bottom left of the screen.



8. Select **Add for Primary Caregiver** or **Add for Non-Primary Caregiver** as appropriate.



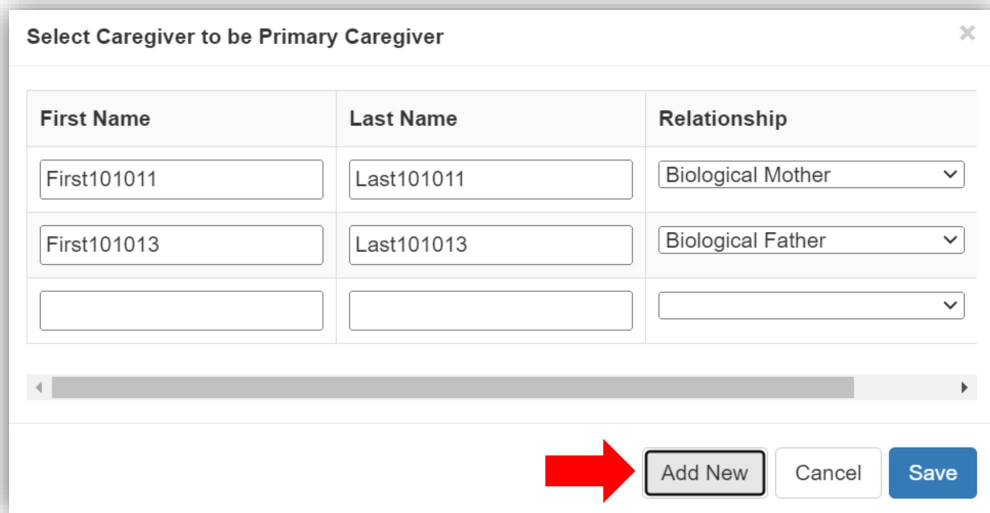
- The Select Caregiver box will pop up. Any caregivers that have been previously entered into OA will show.
- Select the name of the caregiver you are designating as Primary Caregiver or Non-Primary Caregiver. If the caregiver is not on list, press the **Edit** button at the bottom right to add a new caregiver.


Select Caregiver to be Primary Caregiver

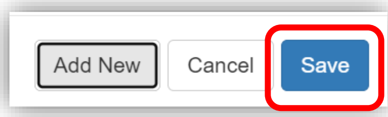
First Name	Last Name	Relationship	Selected
First101011	Last101011	Biological Mother	
First101013	Last101013	Biological Father	

Edit

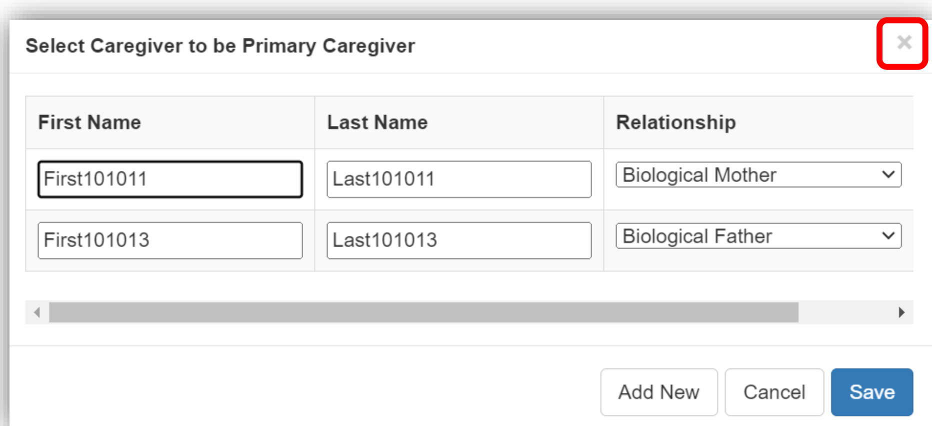
9. Add a new caregiver to the current list by clicking the **Add New** button.
   - If you select **Add New**, a new row will appear, allowing you to enter the First Name, Last Name, and Relationship of the caregiver.
   - You can add as many caregivers as needed by repeating this process.



10. The **Save** button must be clicked after all caregiver entries are made, and before a new caregiver can be selected as a Primary or Non-Primary Caregiver.

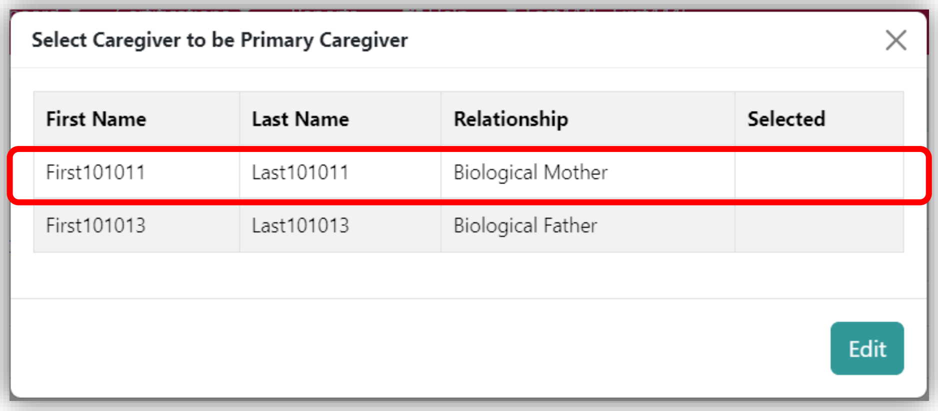


11. If you wish to exit the caregiver screen for any reason, click the "**X**" at the top right of the caregiver box, or click anywhere outside of the box.



Note: Clicking the "**X**" at the top right of the caregiver box, or anywhere outside the screen will take you back to the assessment. Alternatively, clicking on "**Cancel**" while in the screen above, will take you out of editing mode, but still maintain the "Select Caregiver to be Primary/Non-Primary Caregiver" screen open and will not save any modifications or additions made.

12. Once all caregivers have been added and saved, click the row of the Primary Caregiver for which you want to enter assessment scores for.

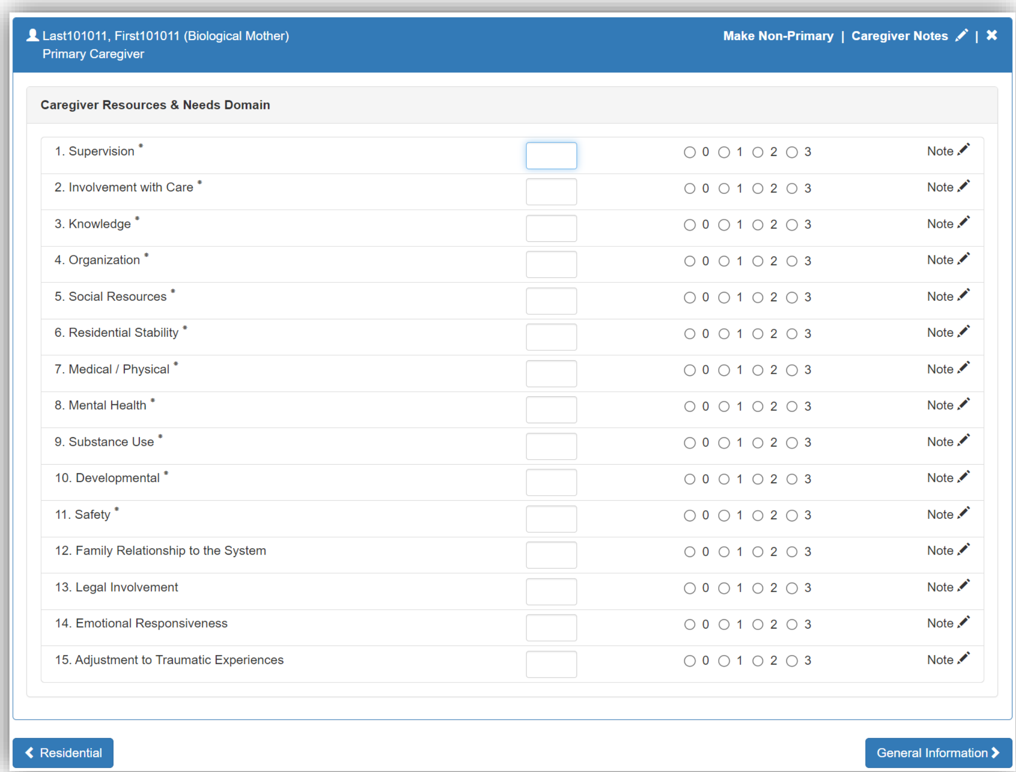

Select Caregiver to be Primary Caregiver

First Name	Last Name	Relationship	Selected
First101011	Last101011	Biological Mother	
First101013	Last101013	Biological Father	

Edit

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

- Complete the fifteen (15) items in the Caregiver Resources & Needs Domain.

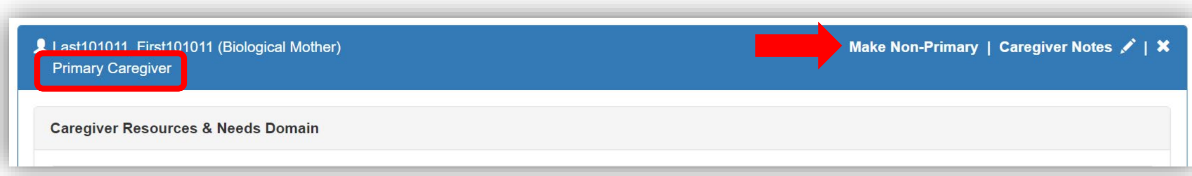

Last101011, First101011 (Biological Mother)
Primary Caregiver
Make Non-Primary | Caregiver Notes

Caregiver Resources & Needs Domain

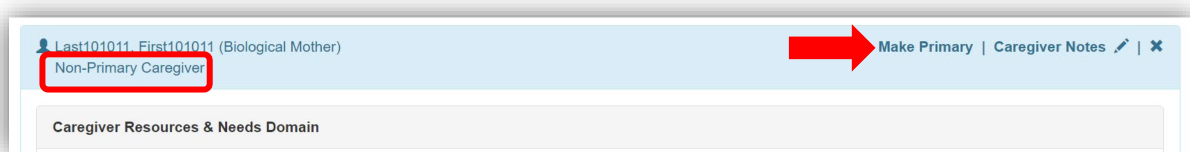
1. Supervision *		0 1 2 3	Note
2. Involvement with Care *		0 1 2 3	Note
3. Knowledge *		0 1 2 3	Note
4. Organization *		0 1 2 3	Note
5. Social Resources *		0 1 2 3	Note
6. Residential Stability *		0 1 2 3	Note
7. Medical / Physical *		0 1 2 3	Note
8. Mental Health *		0 1 2 3	Note
9. Substance Use *		0 1 2 3	Note
10. Developmental *		0 1 2 3	Note
11. Safety *		0 1 2 3	Note
12. Family Relationship to the System		0 1 2 3	Note
13. Legal Involvement		0 1 2 3	Note
14. Emotional Responsiveness		0 1 2 3	Note
15. Adjustment to Traumatic Experiences		0 1 2 3	Note

Residential
General Information

- To change the status of the caregiver:
  - Select “Make Non-Primary” to designate a Primary Caregiver as a **Non-Primary Caregiver.**

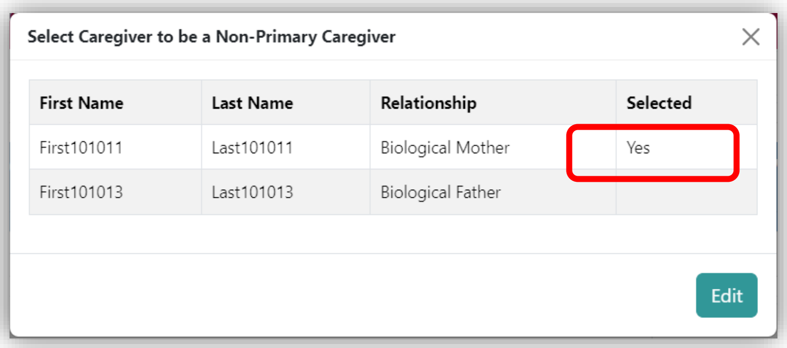


  - Select “Make Primary” to designate the Non-Primary Caregiver as a **Primary Caregiver**.



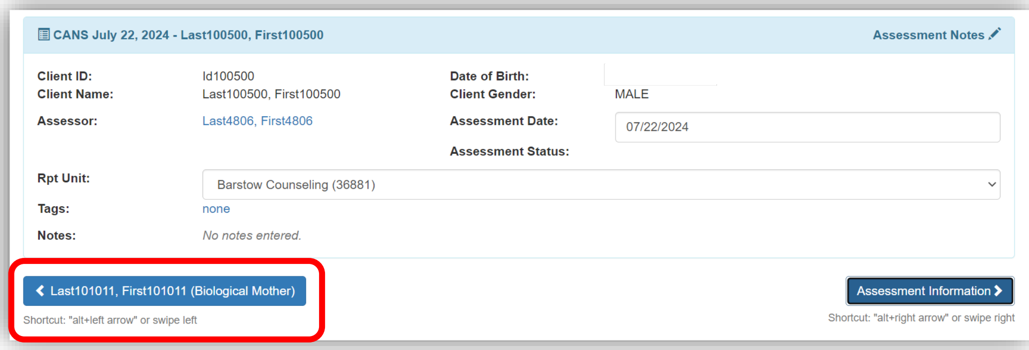
Note: The Primary Caregiver will have a blue background. Non-Primary Caregiver will have a light blue background.

14. To add another caregiver assessment, repeat the steps in this section until you have added information for all the appropriate caregivers.

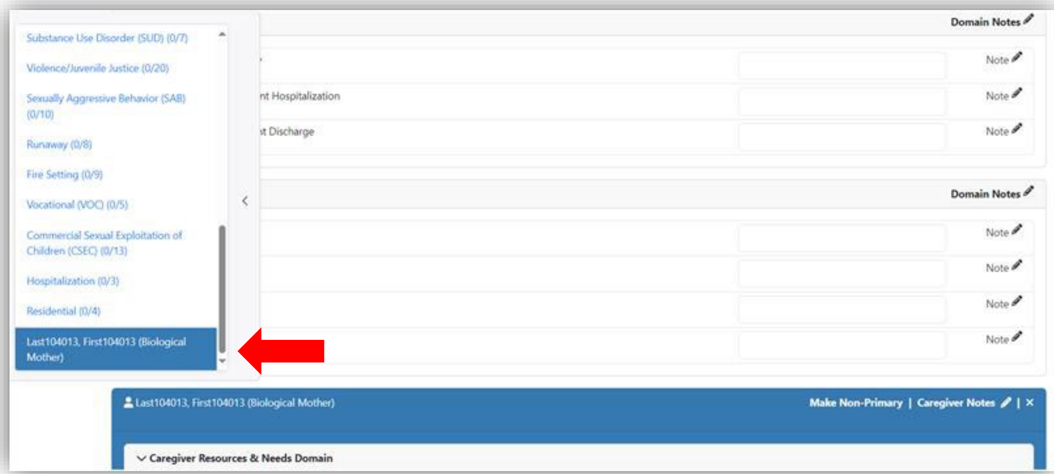


Caregivers who have been added to the assessment are marked with Yes under the Selected column.

Note: The caregiver section can be found in the tab left of General Information when the Quick data entry mode is **OFF**:

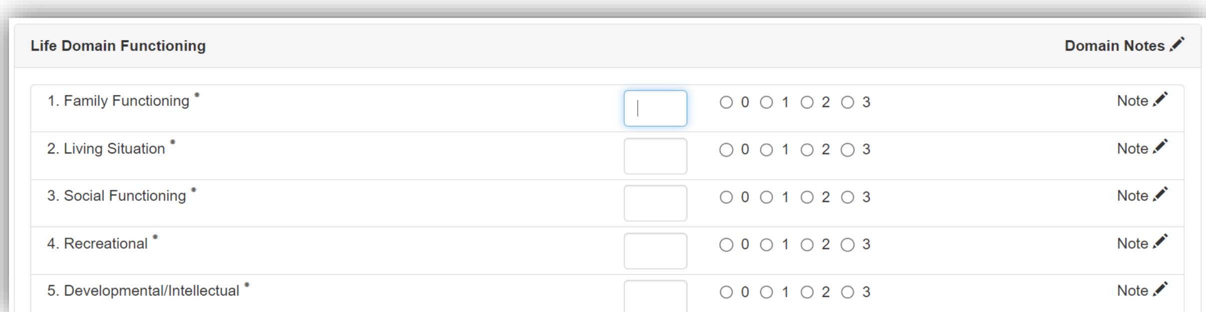


Or, at the bottom of the assessment when the Quick data entry mode is **ON**:



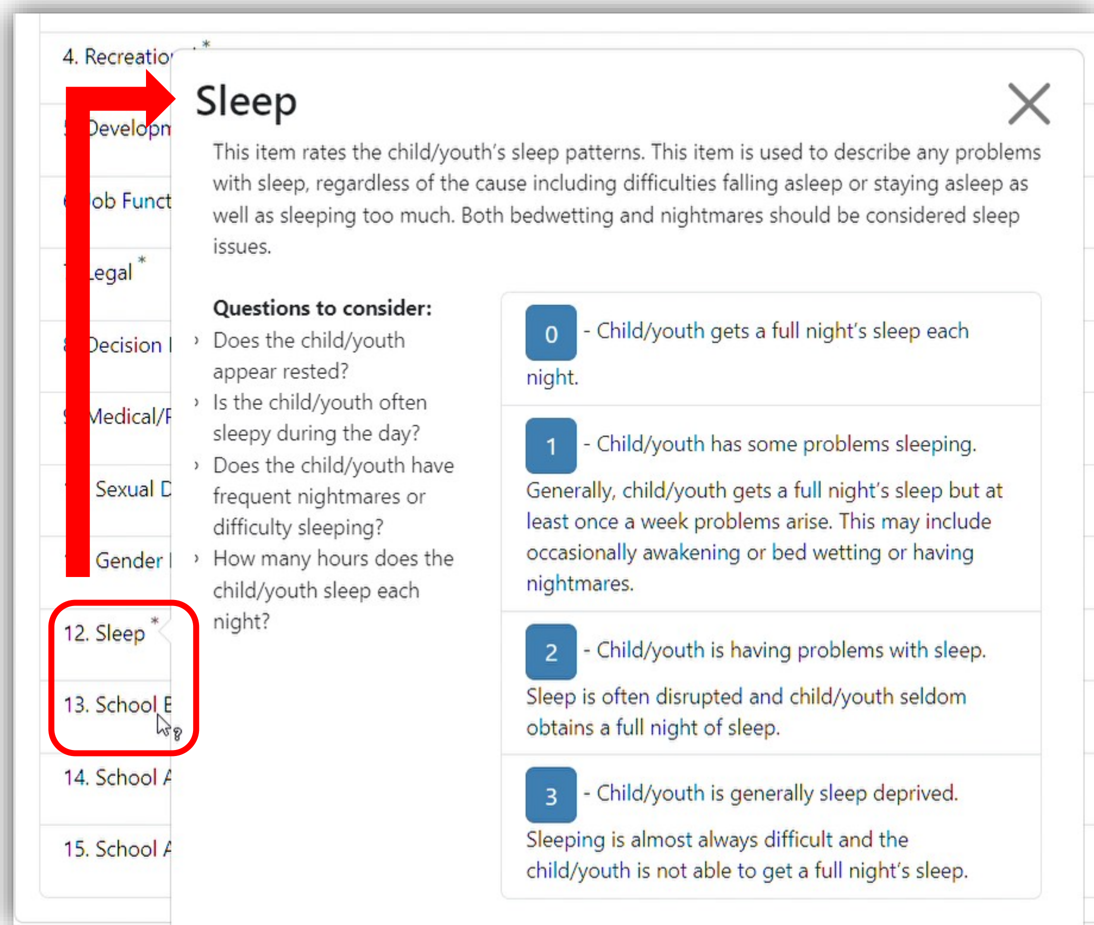
How to Score Items in each Domain

1. Each domain contains a certain number of items to be scored.



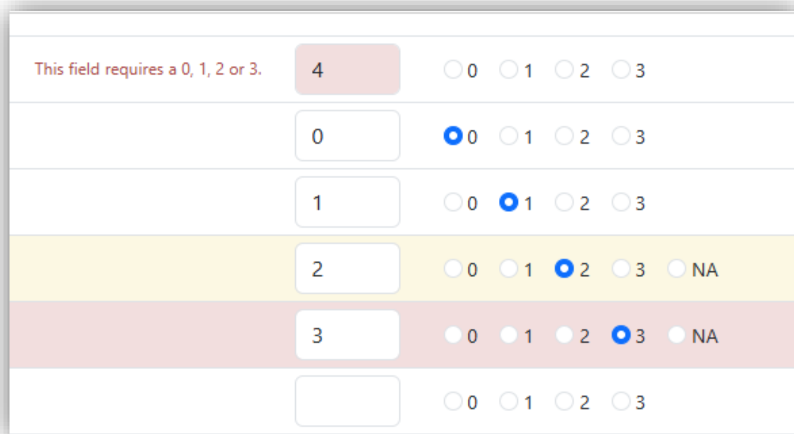
Example: Life Domain Functioning (CANS) contains 15 items.

Note: Hoovering over the domains will show a pointer with a question mark next to it. You can click the domain for further information. This will open a screen with a definition for the item, questions to consider, and the scoring breakdown.
To close the help window and return to the assessment, click the "**X**" at the top right hand of the screen, or click anywhere within the window.



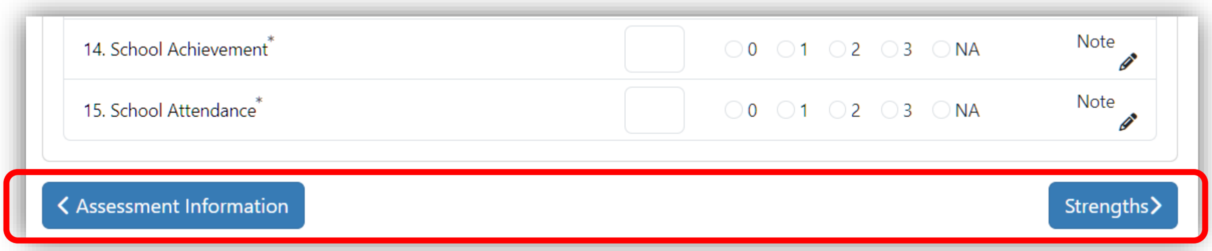
2. There are multiple options for entering the data.
   - Use the Pre-populate button to load in the scores from previous assessments of the same type; or
   - When **Quick data entry mode** is…
     - **ON:** Using your keyboard, enter any number from 0,1,2,3 into the blank field for each item. Press the **Tab** key to transition to the next item.
     - **OFF:** Select one of the bubbles from the existing score options 0,1,2,3 with your mouse.

Note: Scores of 0-3 must be entered in the designated fields. You will obtain a notification if the entered score is invalid. Additionally, scores are color-coded based on their severity *(0 and 1 = white, 2 = yellow, and 3 = red).*

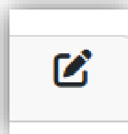


Scoring error and color-coding example.

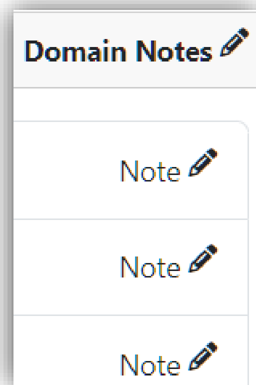
3. Continue through the assessment, completing all required sections and modules by pressing the blue routing buttons.



4. If at any time you would like to add a note to one of the items, click one of the **Note** buttons:

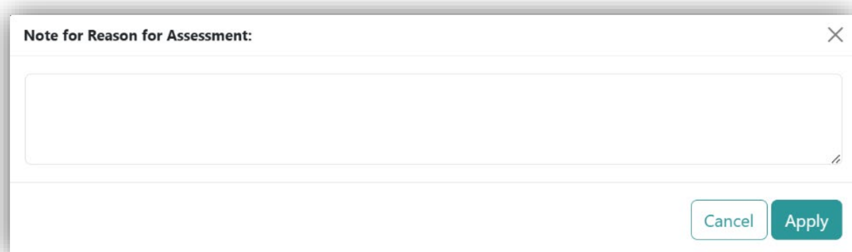


*The **Note** button appears as a note and pencil icon when viewing assessments outside the Edit mode.*

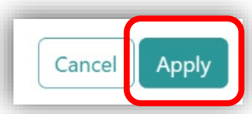


*The **Note** button is different for items in the assessment in Edit mode.*

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



6. Once finished, click **Apply** to save the note.

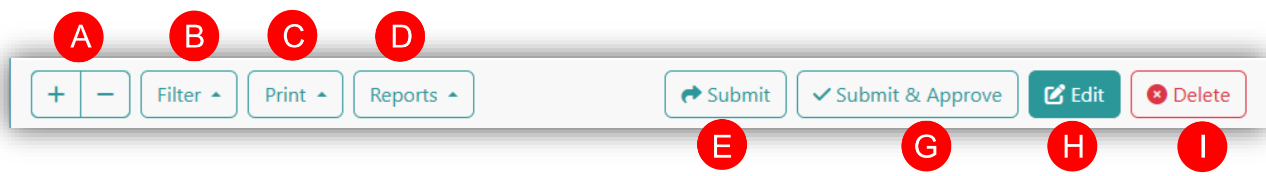


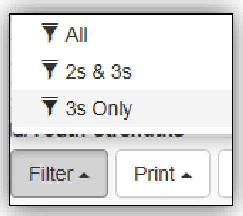
7. Once you have completed all required domain items and modules, click the **Save** button located at the bottom right of the screen.

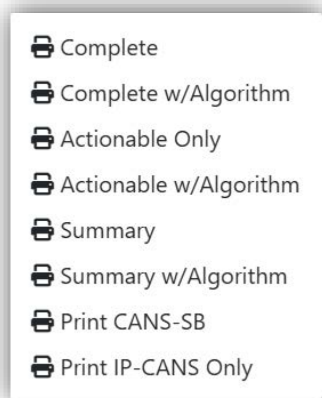
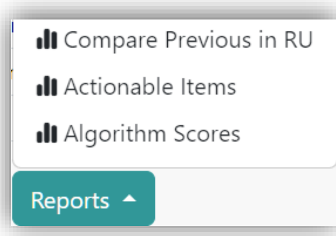
Note: Your browser window may need to be fully sized in order to see all the available options on the screen.

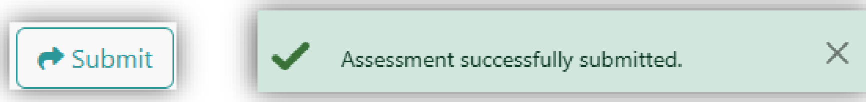
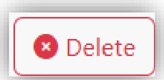
Assessment Toolbar

After the assessment has been saved for the first time (and thereafter) you will see a toolbar along the bottom of the screen. The options (buttons) shown below vary depending on your Objective Arts role.



A. +/- Icons	The **plus/minus** icons on the far left of the toolbar 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.
B. Filter	Allows you to filter by assessment scores. For example, you can filter to show assessment scores of "2s & 3s" or for "3s only". 
C. Print	The **print** options, shown below, allow you to print the assessment in various formats. Each option includes the color-coding of actionable scores (2 – *yellow, 3* - *red*), as well as a version with algorithm scores. • **Complete**: displays the entire assessment in a format that looks like the assessment after it has been saved in OA. • **Actionable**: displays only the domains that contain actionable items and their scores. • **Summary**: displays a shortened assessment overview that highlights the highest reported scores for each domain.

	• **Print CANS-SB/ANSA-SB, Print IP-CANS Only**: displays the assessment in a scantron/multiple choice format. o For most agencies, this is the most used option as they are kept in client charts.  **Note:** Each document will open in a new tab of your browser.
D. Reports	You can generate three (3) different kinds of reports based on the assessment data available. • **Compare Previous in RU**: compares the current assessment with any previous assessment scores in the RU for the client. • **Actionable Items**: displays the highest values of the domains, while highlighting scores of 2's and/or 3's. • **Algorithm Scores**: opens a pop-up window that provides numerical feedback about the client's core needs and the ICC coordinator's own evaluation. 
E. Submit	The **Submit** button allows you to submit the assessment for review and approval from your supervisor. If successful, you will see a temporary confirmation message appear at the top right corner verifying that the assessment was successfully submitted. If not, you will receive validation errors. Please refer to the *Validation Errors* section for more information on how they can be addressed.

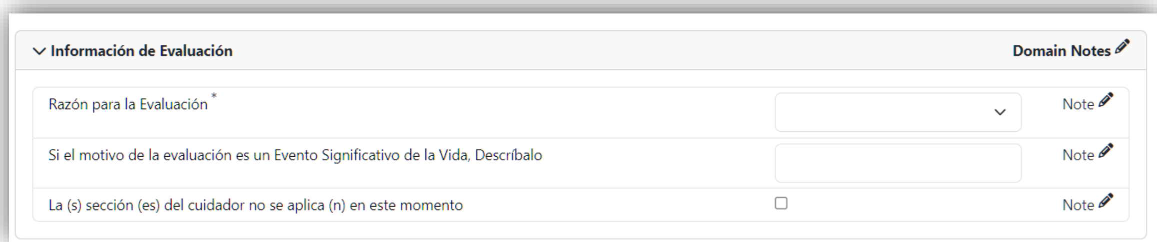
	
F. Recall	The **Recall** button allows you to recall an assessment prior to its approval.  **Note:** This button will replace the **Submit** button once an assessment has been submitted.
G. Submit and Approve	This button allows Supervisors and Clinical Administrators to Submit and Approve an assessment at the same time. Please see the *Assessment Approval section* on page 55 for more information. 
H. Edit	The **Edit** button allows you to change information in the assessment**.** 
I. Delete	The **Delete** button allows for the deletion of an assessment. Your ability to delete depends on your Objective Arts role. 

Switching Languages

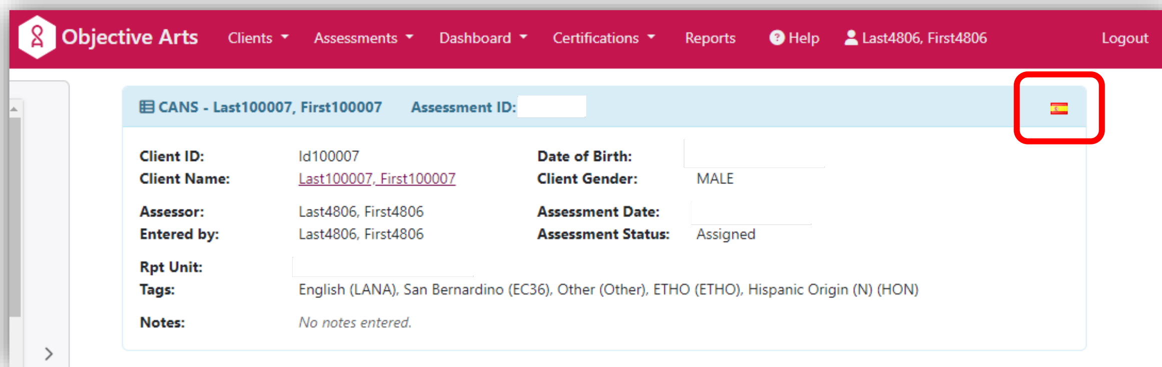
A select number of assessments and reports are accessible in additional languages. These will be denoted by an adjacent flag and the language it represents.

You have the option to create a new CANS assessment in Spanish.

Note: Supported languages include English and Spanish.



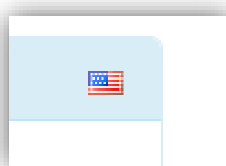
An example of a new CANS assessment translated in Spanish.



To Switch Languages:
The language in which the assessment appears will change based on the flag that is shown in the upper right-hand corner of the assessment page.

1. While in review mode, click on the **Spanish Flag** to change to Spanish.

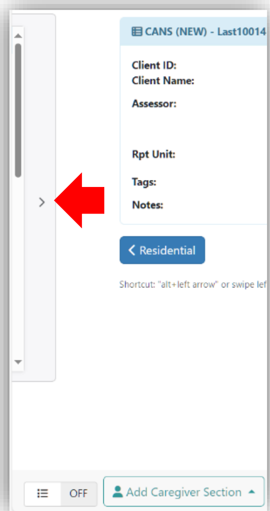
2. Switch back to English when the **United States Flag** is displayed.



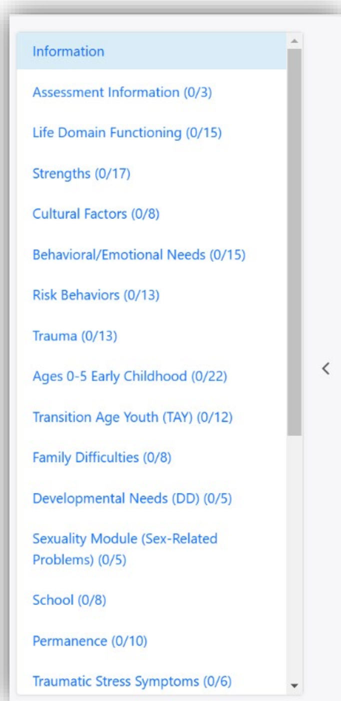
Side Panel

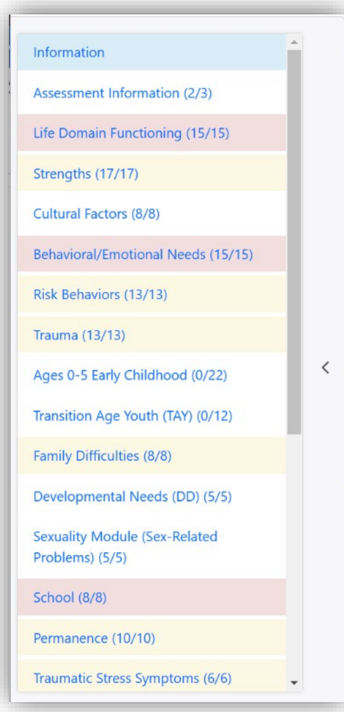
The **Side Panel** allows you to advance to the assessment domain or module of your choice. It provides a summary-level, color-coded view (by actionable scores) of the assessment's domains and modules.

1. With an assessment open, click the **arrow** on the left-hand side of the screen to open the **Side Panel**.



This is how the **Side Panel** appears when a new assessment is opened.

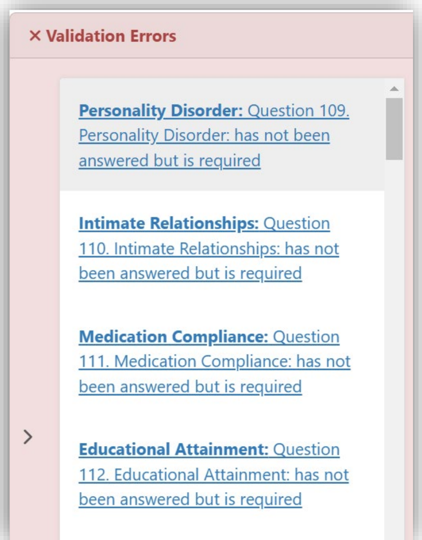




This is how the **Side Panel** appears when scores have been entered.

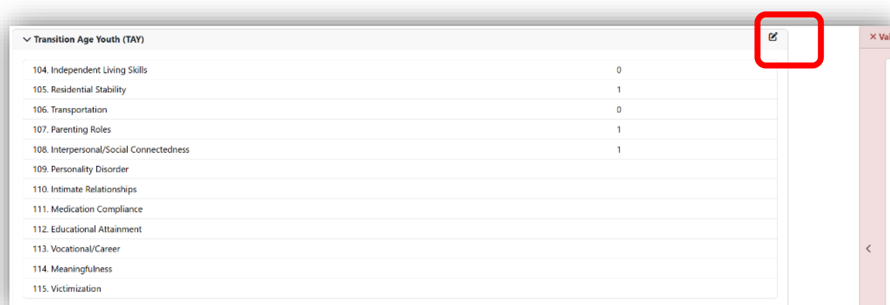
Validation Errors

Assessments submitted without required information will return with validation errors. A **Validation Errors panel** will appear on the right side of your screen. It provides a list of all the items that must be completed in the CANS-SB/ANSA-SB assessment by linking the item name, number, and error reason. This is designed to ensure that all parts of the assessment are complete before successful submission.

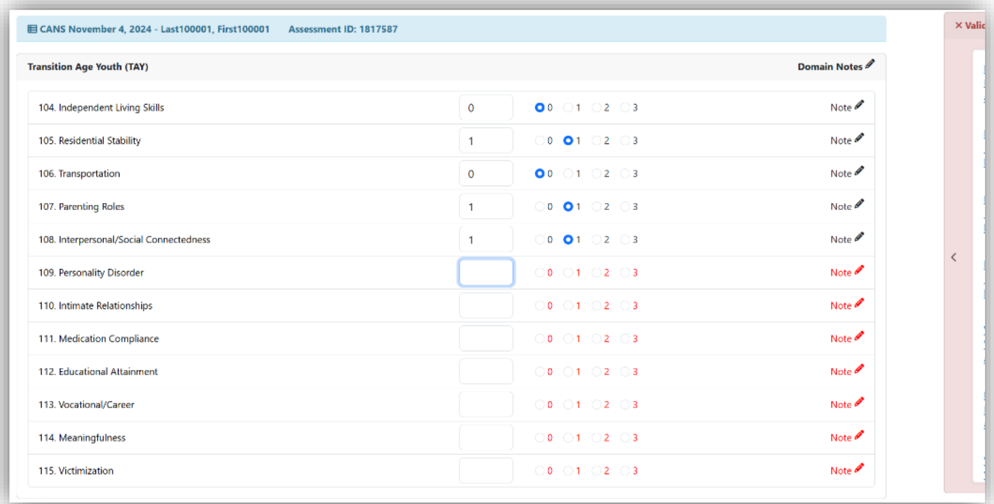


An example of the Validation Error panel.

1. Click any **item link** from the panel. It will move your screen to where that item is located in the assessment.
2. Go into **Edit Mode** by clicking the **paper and pencil icon** (located at the top, right corner of that section) and address your first error.



3. Open the **Validation Error** panel again and repeat this process until all errors have been addressed.



Validation errors appear in red text.

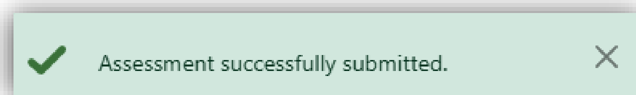
4. Click **Save** to save your changes.

Submitting an Assessment

Once assessment data entry is complete and all your validation errors have been addressed, you are ready to submit the assessment to your supervisor for approval.

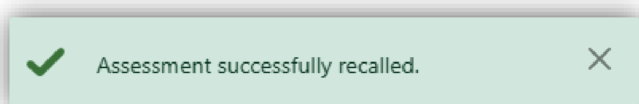
1. Click the Submit button located at the bottom of your screen.

   You'll be notified if it's successfully submitted.



In the event you notice that further changes need to be made before your supervisor reviews your assessment, you can recall the assessment.

2. Click the Recall button located at the bottom of your screen. You'll be notified if it's successfully recalled.



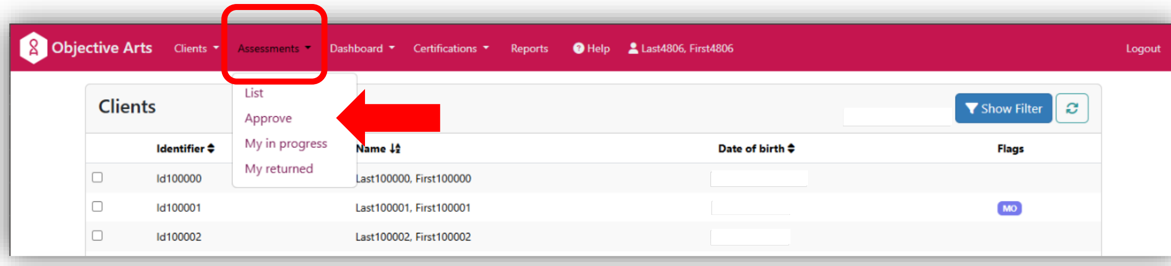
3. When ready for re-submission, repeat Step 1.

APPROVING ASSESSMENTS

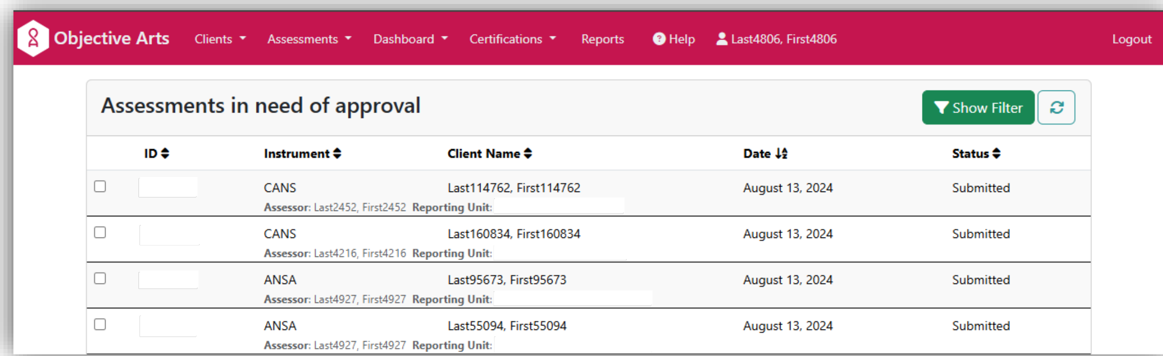
Assessment Approval

Once an assessment has been submitted by clinical staff, it must be approved by their supervisor. This is a task that only users with the Supervisor and/or Clinical Administrator roles have the ability to do.

1. From the **Data Portal Toolbar**, click **Assessments** 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.



There are three ways you can choose to approve assessments from this screen:

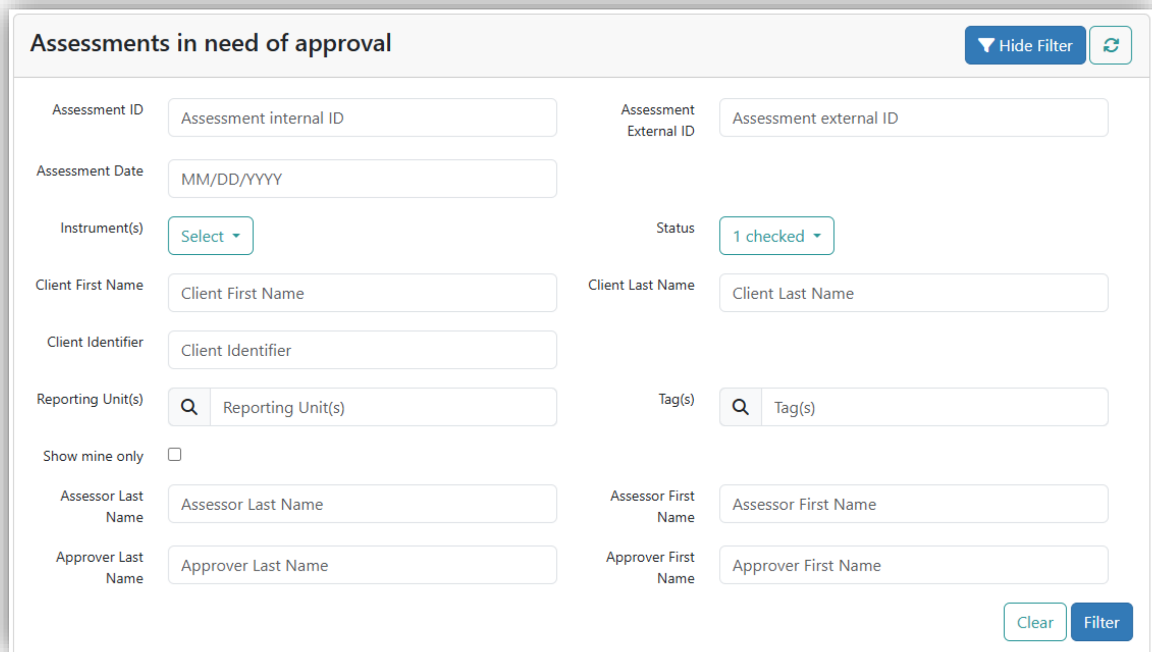
- **Method #1:** *"Traditional"* - Open the assessment by clicking on the assessment row, then approve.

- **Method #2:** *"Sequential Approve"* – Select a number of assessments by clicking on the checkbox(es) to the left of the IDs and click the dedicated button to approve or reject each one on a rolling basis.

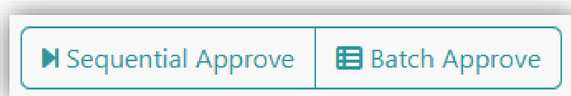
- **Method #3:** "*Batch Approve*" – Select a number of assessments by clicking on the checkbox(es) to the left of the IDs and click the dedicated button to open the Batch Approve page.

As you approve, you can refresh the list periodically by clicking the  icon located to the right of the **Show Filter** button, to see if any other assessments have been submitted for approval.

3. The assessments to be approved can be filtered by using the **Show Filter** button.

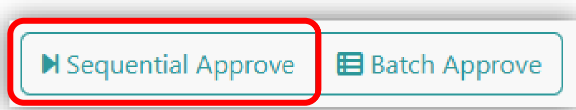


The **Sequential** and **Batch Approve** options offer similar approval processes but come with slightly different viewing formats. Both options can be accessed via the toolbar at the bottom right of the screen.

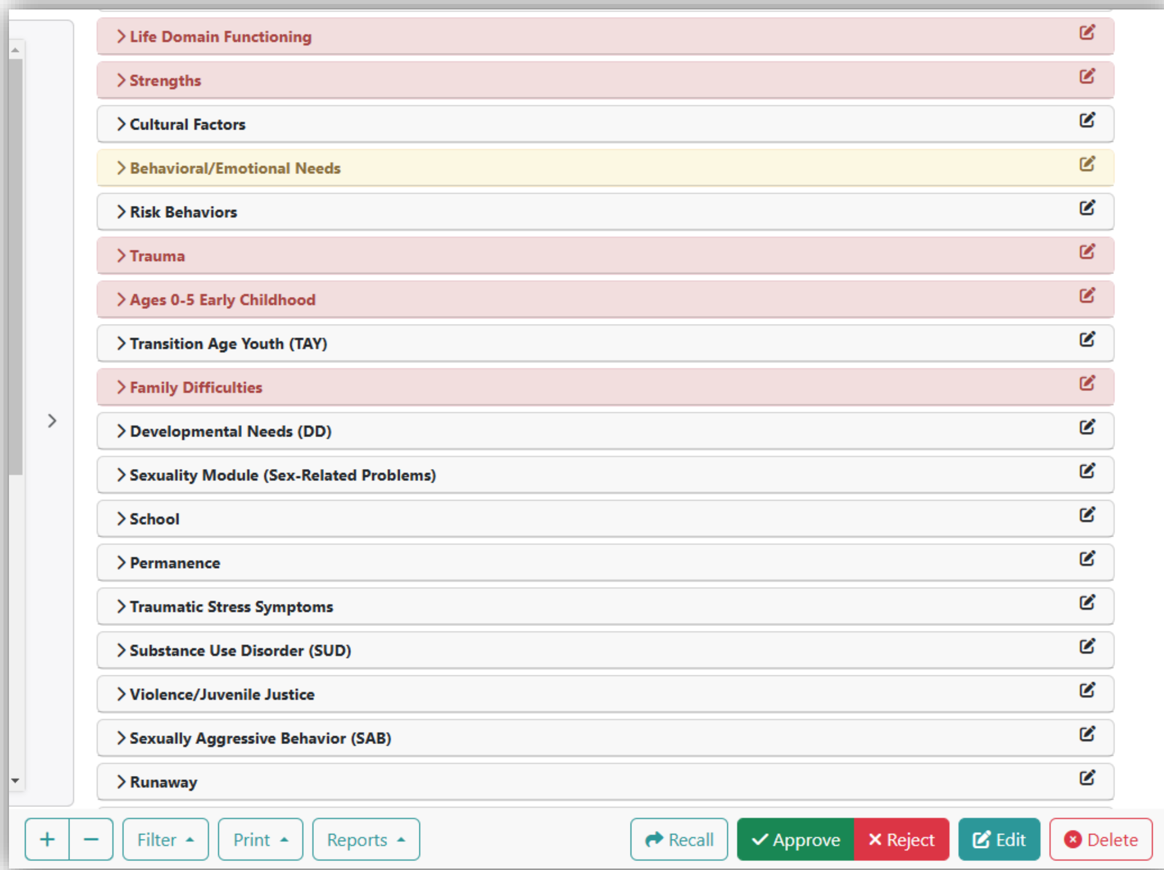


Sequential Approve

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



2. The first assessment in the list will open in the format below:

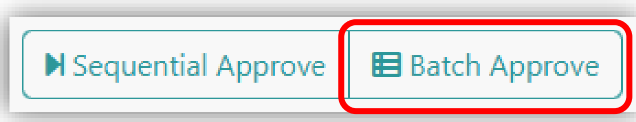


3. From here you can approve or reject each listed assessment on a rolling basis.

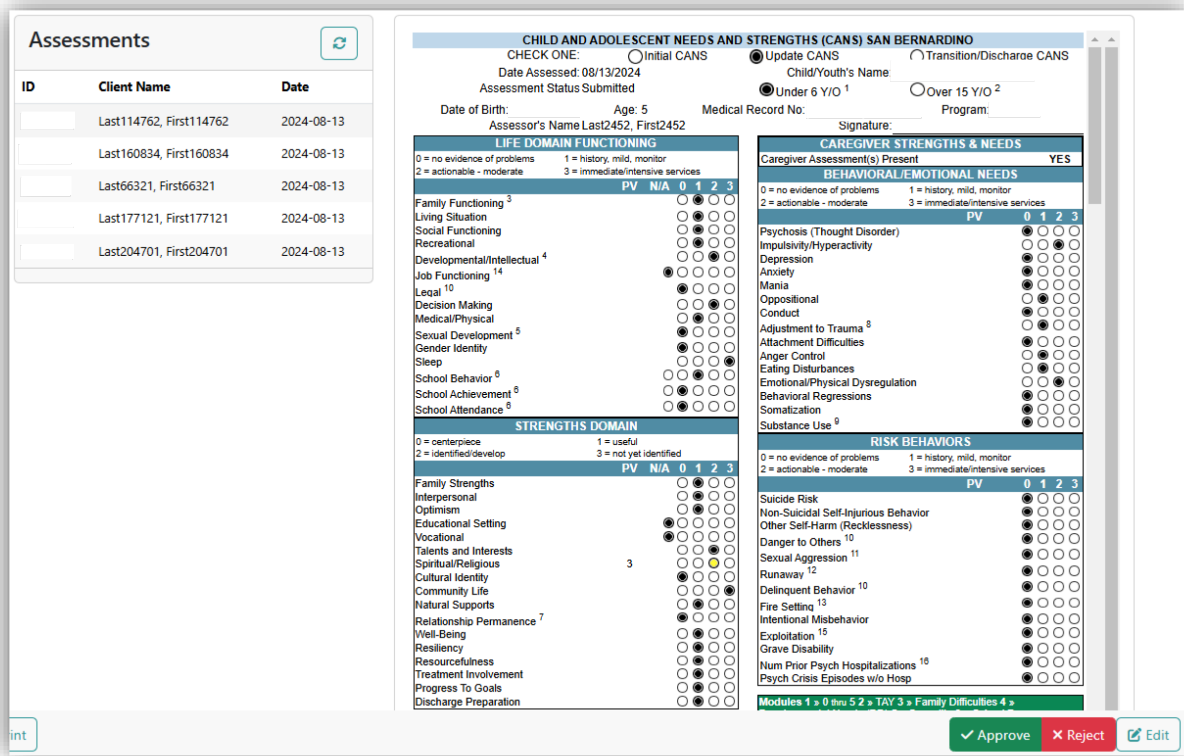
   - For example, once you **Approve** or **Reject** the first assessment, the second assessment in the list opens for you to approve or reject, then the third, and so on. In this view, you can also **Edit** before approving, if necessary.

Batch Approve

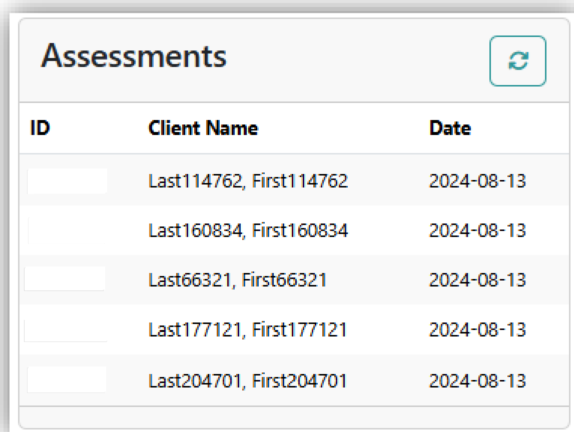
1. Click the **Batch Approve** button at the lower right of the screen to access Assessments in need of approval.



- 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/ANSA-SB score sheet that needs approval. Notice that this assessment format is much like the Print CANS-SB/ANSA-SB scoresheet.

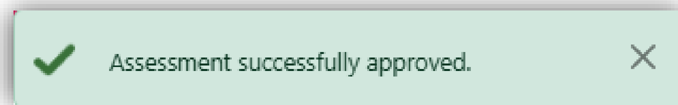


- You will be able to **Approve** or **Reject** the assessment and move to the next assessment automatically, like in Sequential Approval.

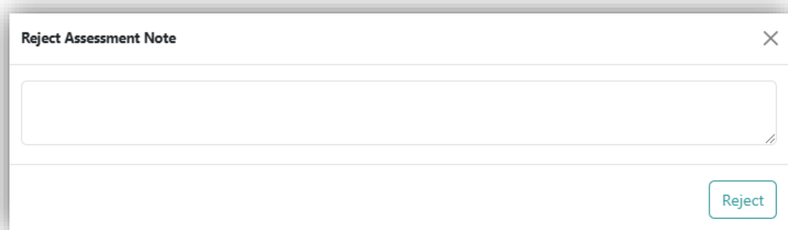


2. For both processes, you will click the buttons (shown below) to either approve or reject the given assessment.

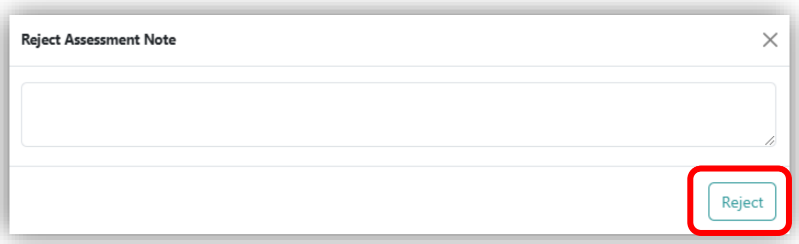
- After you approve the assessment, you will receive a green confirmation message near the top right of your screen that says, *"Assessment successfully approved"*.



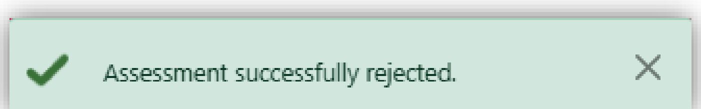
- If you choose to reject the assessment, you will receive a Reject Assessment Note box in which you must note why the assessment is being rejected. The rejected assessment will be sent back to the assessor's To Do List.



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 rejection note.



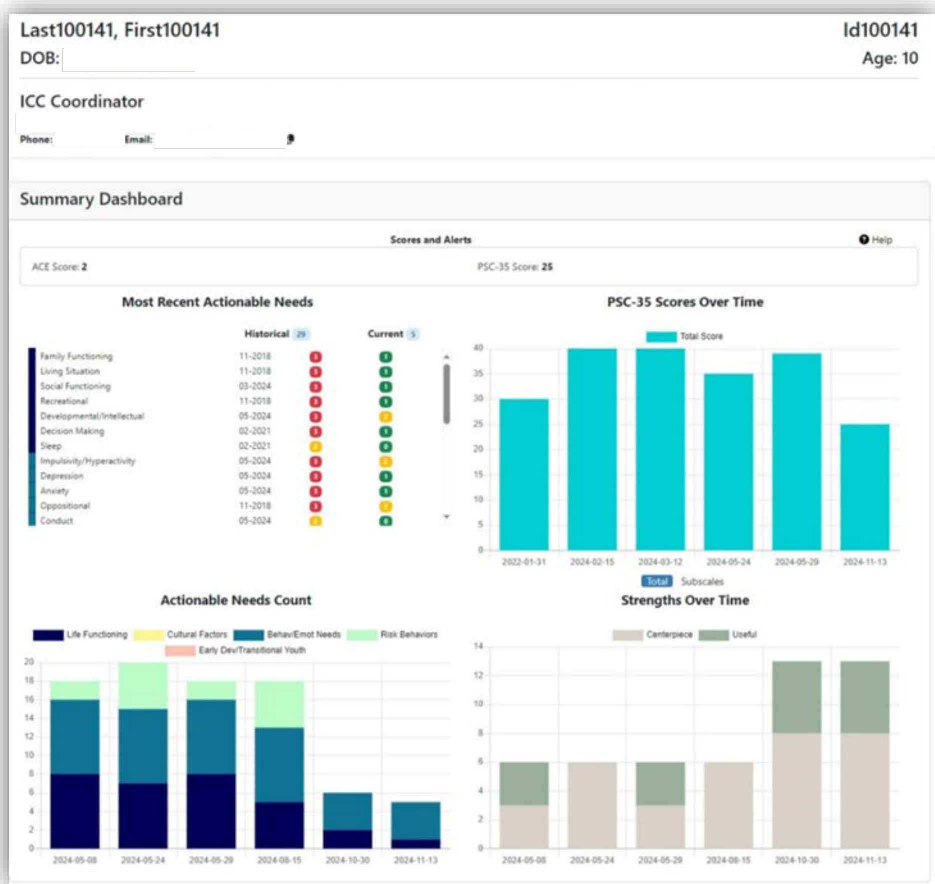
- Once you click **Reject**, you will see a green confirmation message near the top right that says, *"Assessment successfully rejected."*



DASHBOARDS

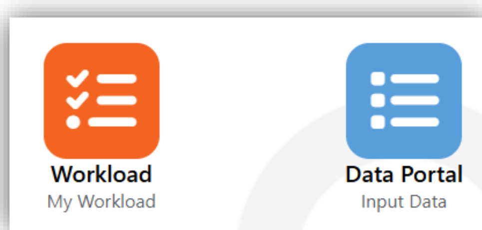
Client Summary Dashboard

The Client Summary Dashboard is a section within the Client Page (*more information on Client Page found on page 22*).
The Client Summary Dashboard provides scores, alerts, and graphical data for the client's most recent assessments.

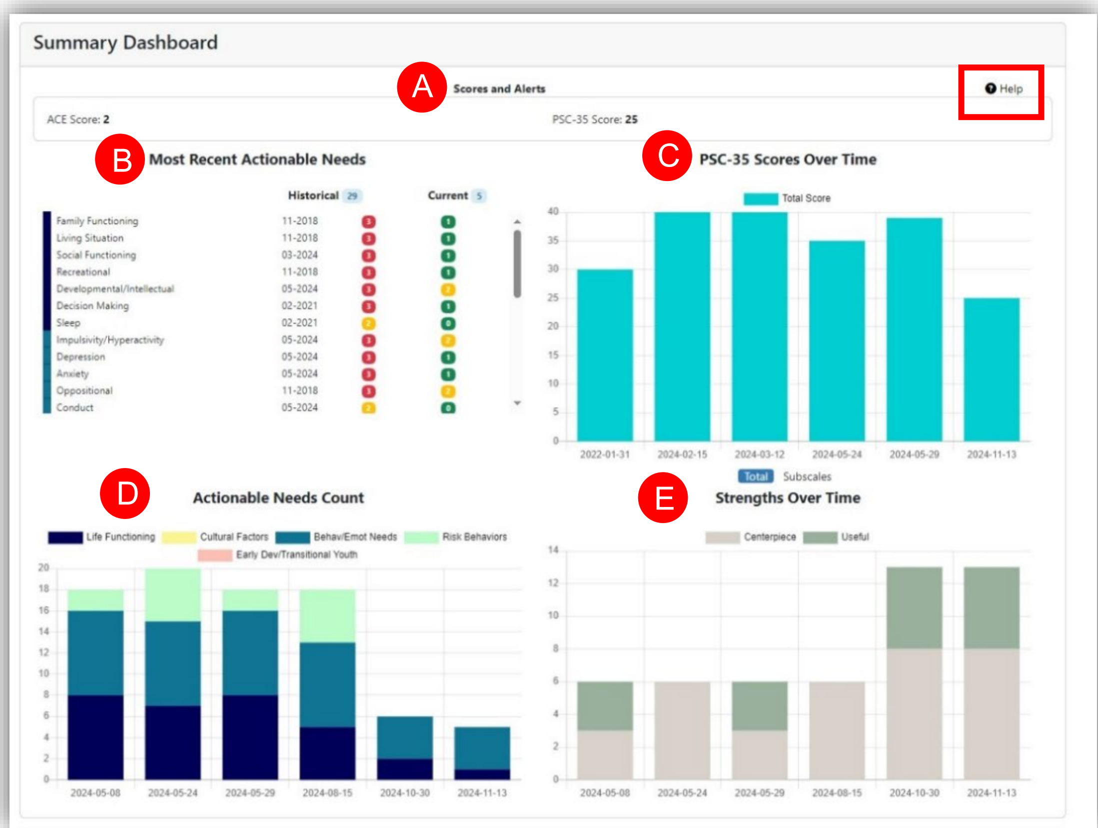


<u>How to Navigate to the Client Summary Dashboard:</u>

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



2. Click on the client's name to open their **Client Page**.
   - Contained in the Client Page is the **Client Summary Dashboard**. If there are assessments in OA for the client, the screen will contain information about their assessment scores in graphic form. If there are no assessments in OA for the client, it will return "No data found!"



*Click the **Help** button for more information about each Dashboard item.*

Summary Dashboard Overview

A. Scores and Alerts	• This section appears at the top of the dashboard. A score for the most recent ACE and/or PSC-35 assessment is displayed. If no ACE or PSC-35 has been completed, this area will read *"No scores or alerts to show."* • If any of the questions for Suicide Risk, Danger to Others, or Adjustment to Trauma were scored as an actionable need (*2's or 3's*) in the client's most recent assessment, then an alert will populate next to the recent ACE and/or PSC-35 scores.
B. Most Recent Actionable Needs	• This chart shows a list of all actionable needs (scores of *2 & 3*). The rows list items in the same order as they appear

<table>
<tr>
<td></td>
<td>
in the assessments, where they are color-coded based on the domain it falls under.

There are two columns of data, historical and current. The numbers in blue are a count of the sum of Actionable Needs. The historical column shows the date and score where the item was first scored as actionable. It will say “No hist.” if the item has never been rated above 0 or 1 in the past. The current column displays the scores of historical actionable items that have stayed the same, or newly scored actionable items that were rated in the most recent assessment.
Scores of 0 and 1 appear in a green circle, scores of 2 are in yellow, and scores of 3 are in red.

</td>
</tr>
<tr>
<td>C. PSC-35 Scores Over Time</td>
<td>

This graph shows the dates and scores of the six most recent PSC-35 assessments. By default, the height of each bar represents the total score for that specific assessment.
Click Subscales to break down each score into the following categories: Attention, Internalizing, & Externalizing.

</td>
</tr>
<tr>
<td>D. Actionable Needs Over Time</td>
<td>

This graph shows the count of actionable items (scores of 2 & 3) from the six most recent assessments by domain. Each band represents a domain which can overlap based on the number of actionable needs tallied at each point.
The following key outlines each domain’s abbreviation and assigned color:

<table>
<tr><td></td><td>LDF</td><td>Life Domain Functioning</td></tr>
<tr><td></td><td>CF</td><td>Cultural Factors</td></tr>
<tr><td></td><td>BEN</td><td>Behavioral/Emotional Needs (CANS only)</td></tr>
<tr><td></td><td>BHN</td><td>Behavioral Health Needs (ANSA only)</td></tr>
<tr><td></td><td>RB</td><td>Risk Behaviors</td></tr>
<tr><td></td><td>ED/TAY</td><td>Early Development/Transitional-Age Youth</td></tr>
</table>

You can hover your cursor over any of the points on the graph to see the number of actionable needs for the domain(s) from that specific assessment.

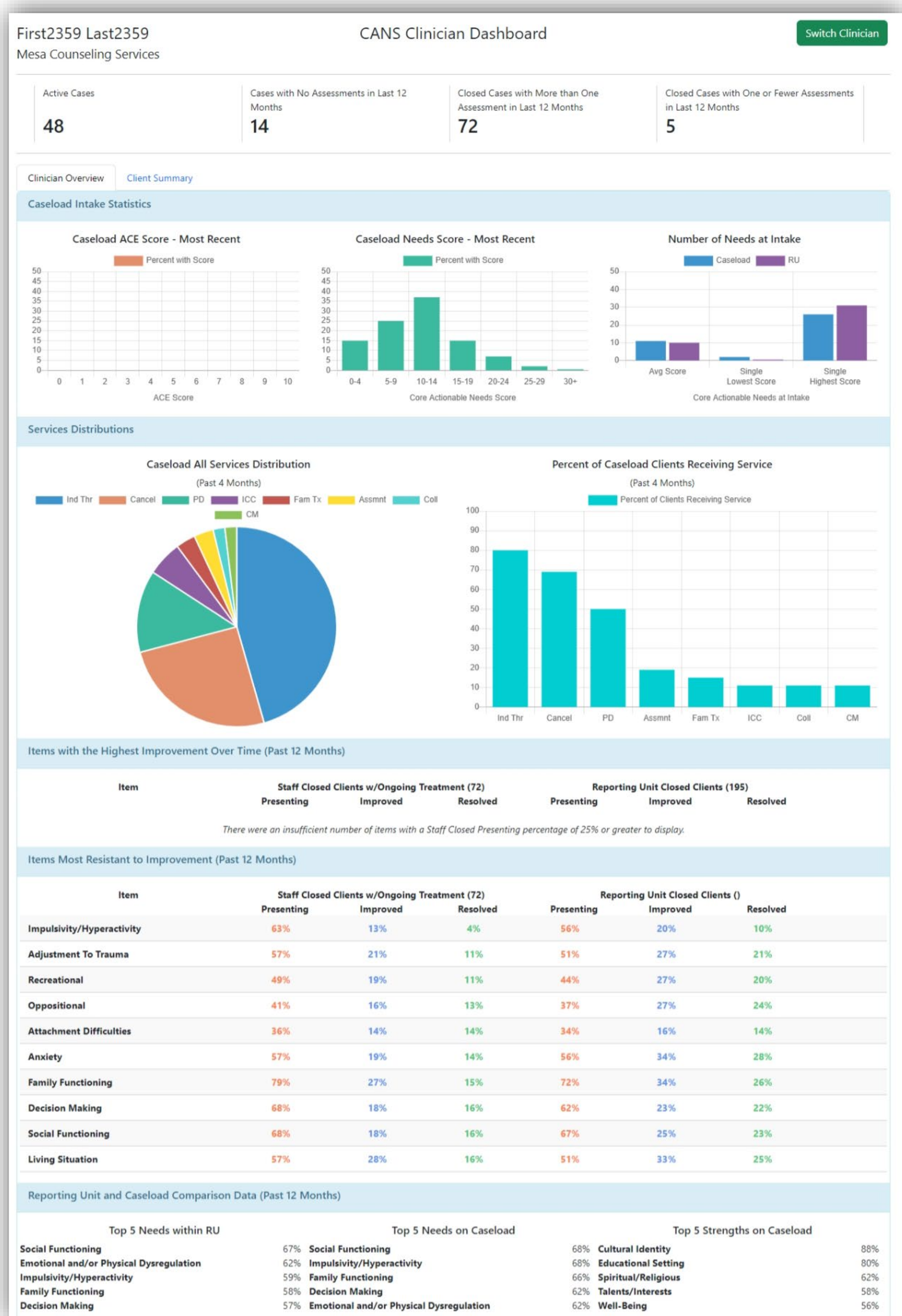
</td>
</tr>
<tr>
<td>E. Strengths Over Time</td>
<td>

This graph shows the count of centerpiece (scores of 0) and useful (scores of 1) strengths from the six most recent assessments. You can hover your cursor over any of the points on the graph to see the number of strengths from that specific assessment.

</td>
</tr>
</table>

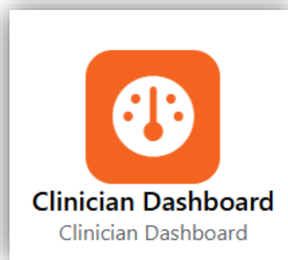
Clinician Dashboard

The Clinician Dashboard provides you with an insight to what your caseload looks like, as well as how your clients are scoring, the number of assessments that are being administered, and how your caseload compares within your RU.

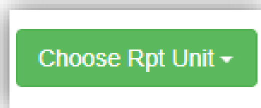


<u>How to Navigate to the Clinician Dashboard:</u>

1. From the **Home screen**, click **Clinician Dashboard**.



2. Choose your **RU** (if you are in multiple RUs).



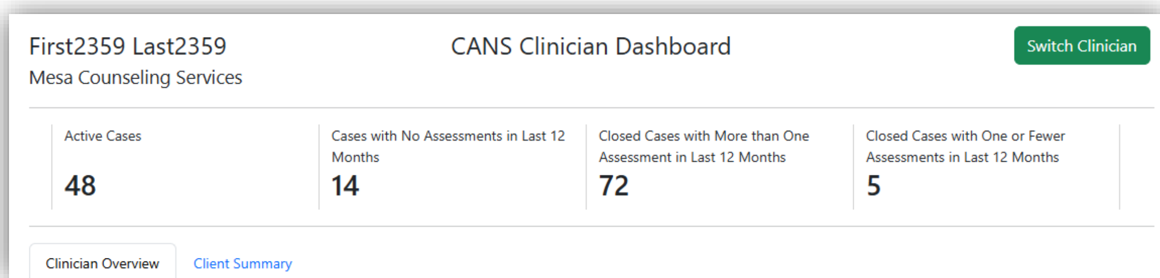
- If you're in multiple RUs, then you will see a green box in the top right corner that reads "**Choose Rpt Unit**." You will see data for whichever RU you have selected. You can verify the RU that you're looking at by checking the RU listed under your name in the top left corner. If you are only in one RU, you will not see the green button.

Clinician Overview Breakdown

The top of this dashboard provides you with a brief overview of your caseload according to the TCOM assessment you administer.

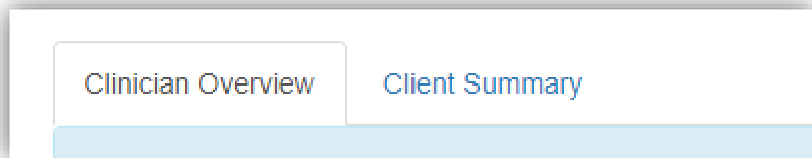
It will give you a breakdown of the number of:

- Active Cases,
- Cases with No Assessments in the Last 12 Months,
- Closed Cases with More than One Assessment in the Last 12 Months, and
- Closed Cases with One or Fewer Assessments in the Last 12 Months.



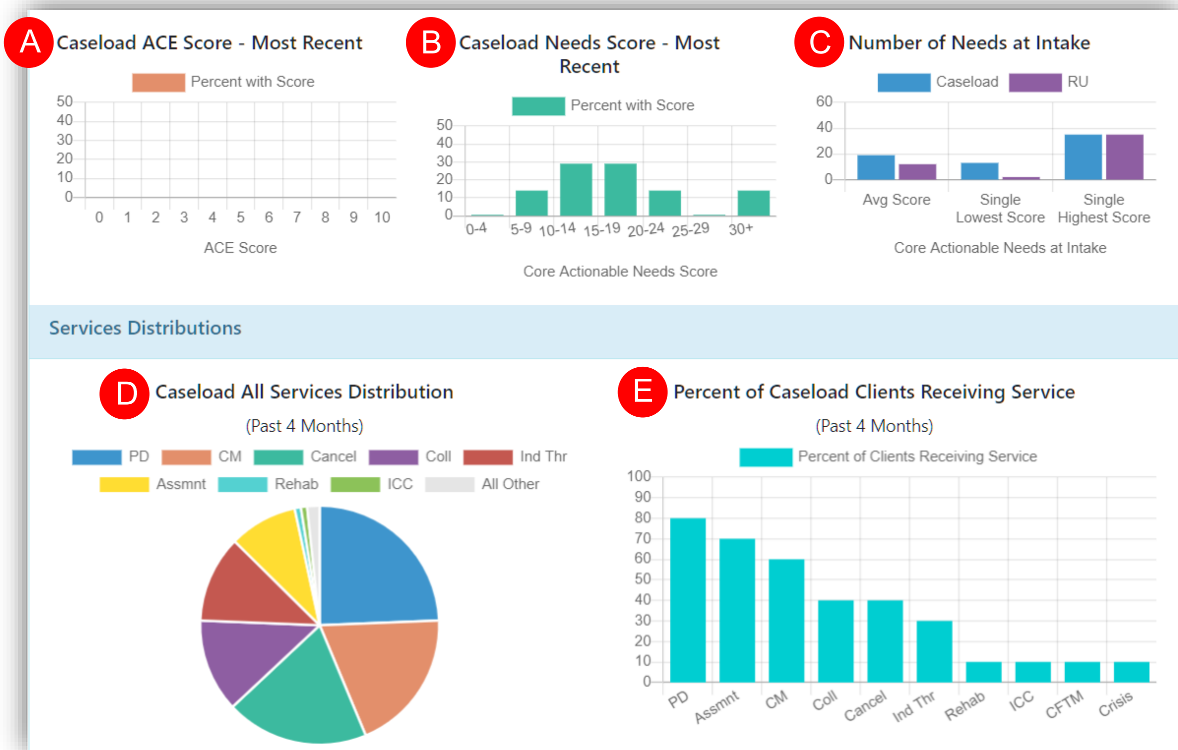
Example of case overview for a CANS Clinician Dashboard.

Clinician Overview Tab



This is the default tab that you will see when you first access the **Clinician Dashboard**. The tabs are in the top left corner under the count of Active Cases. There are several sections of the Clinician Overview tab, they include:

1. **Caseload Intake Statistics and Services Distributions**
   This section contains the following five graphs:



A. Caseload ACE Score - Most Recent	This graph shows the percentage of clients by ACE score. Only clients who have received an ACE assessment will appear on this graph.
B. Caseload Needs Score - Most Recent	This graph shows the percentage of clients by CANS score. The groups are based off the number of actionable items *(scores of 2 or 3)* within the core needs domains of the CANS assessment. The groups include 0-4, 5-9, 10-14, 15-19, 20-24, 25-29, and 30+.

C. Number of Needs at Intake	This graph shows data for both the clinician *(in blue)* and the program *(in purple)*. The Avg Score bars show the average number of actionable items *(score of 2 or 3)* of all clients within the core needs domains of the CANS assessment. The Single Lowest Score bars show the score of the client with the lowest number of actionable items *(score of 2 or 3)* within the core needs domains of the CANS assessment at intake. The Single Highest Score bars show the score of the client with the highest number of actionable items *(score of 2 or 3)* within the core needs domains of the CANS assessment at intake.
D. Caseload All Services Distribution	This pie chart divides all the services that the clinician has provided over the past four months. The service type percentage can be estimated by looking at the pie chart. You can see the number of services provided by hovering over an item on the graph.
E. Percent of Caseload Clients Receiving Service	This graph shows the percentage of the clients in the clinician's caseload that have received each service in the past four months. You can see the percent of clients receiving each service by hovering over an item on the chart.

2. Items with the Highest Improvement Over Time (Past 12 Months)

Items with the Highest Improvement Over Time (Past 12 Months)

Item	Staff Closed Clients w/Ongoing Treatment (35)			Reporting Unit Closed Clients (216)		
	Presenting	Improved	Resolved	Presenting	Improved	Resolved
Impulsivity/Hyperactivity	35%	57%	57%	31%	25%	19%
Anger Control	61%	50%	50%	38%	34%	31%
Suicide Risk	30%	41%	41%	23%	28%	28%

This chart lists the items from the CANS assessment with the highest improvement over the past 12 months for all closed clients. Any item presenting *(score of 2 or 3 at initial assessment)* with under 25% is excluded from this list. The list is sorted by the Staff Improved column from highest to lowest. The chart includes data from the clinician's caseload and from the reporting unit for comparison.

3. Items Most Resistant to Improvement (Past 12 Months)

Items Most Resistant to Improvement (Past 12 Months)

Item	Staff Closed Clients w/Ongoing Treatment (43)			Reporting Unit Closed Clients ()		
	Presenting	Improved	Resolved	Presenting	Improved	Resolved
Substance Use	44%	0%	0%	52%	6%	4%
Psychosis(Thought Disorder)	37%	0%	0%	30%	9%	8%
Intimate Relationships	60%	0%	0%	34%	1%	1%
Transportation	39%	0%	0%	15%	0%	0%
Decision-Making/Judgment	32%	0%	0%	23%	0%	0%
Medication Compliance	27%	0%	0%	14%	0%	0%
Residential Stability	48%	9%	0%	20%	3%	0%
Social Functioning	67%	0%	0%	78%	4%	2%
Recreational	60%	3%	3%	63%	6%	4%
Self-Care	58%	4%	4%	61%	5%	4%

This chart lists the items from the CANS assessment that are most resistant to improvement over the past 12 months for all closed clients. Any item presenting *(score of 2 or 3 at initial assessment)* with under 25% is excluded from this list. The list is sorted by the Staff Improved column from lowest to highest. The chart includes data from the clinician's caseload and from the reporting unit for comparison.

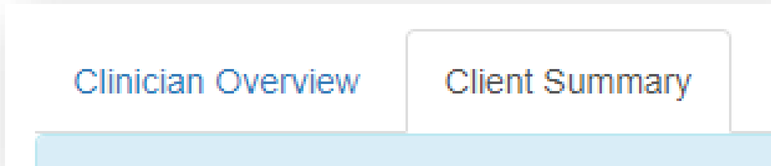
4. Reporting Unit and Caseload Comparison Data (Past 12 Months)

This section contains the following three sections:

Top 5 Needs within RU		Top 5 Needs on Caseload		Top 5 Strengths on Caseload	
Family Functioning	80%	Living Situation	100%	Family Strengths	100%
Living Situation	76%	Decision Making	100%	Talents/Interests	100%
Decision Making	70%	School Achievement	100%	Cultural Identity	100%
Social Functioning	65%	Impulsivity/Hyperactivity	100%	Educational Setting	80%
Impulsivity/Hyperactivity	63%	Family Functioning	80%	Interpersonal	60%

A. Top 5 Needs within RU	This chart shows the top five needs *(score of 2 or 3)* for all clients in the reporting unit.
B. Top 5 Needs on Caseload	This chart shows the top five needs *(score of 2 or 3)* for all clients in the clinician's caseload.
C. Top 5 Strengths on Caseload	This chart shows the top five strengths for all clients in the clinician's caseload.

Client Summary Tab



1. Actionable Count Summary for Caseload

Actionable Count Summary for Caseload

Life Domain Functioning					
Family Relationships	4	Social Functioning	4 L	Recreational	10 H
Developmental/Intellectual	1	Employment Functioning	2	Legal	0
Physical/Medical	2	Sexual Relations	3	Sleep	5
Living Skills	8	Residential Stability	2	Self-Care	7
Medication Compliance	4	Decision-Making/Judgment	1	Involvement in Recovery/Motivation for Treatment	1
Transportation	6 H	Parenting Roles	0	Intimate Relationships	5
Educational Attainment	1				
Behavioral Health Needs					
Psychosis(Thought Disorder)	4	Impulse Control	1	Depression	8 H
Anxiety	8 H	Antisocial Behavior	0	Adjustment to Trauma	3
Anger Control	4	Eating Disturbances	5 H	Somatization	0
Substance Use	4	Cognition	0	Mania	2

This chart shows the number of actionable items (*score of 2 or 3*) in a clinician's caseload. The items are grouped by domain/module. If a number for a specific item is significantly higher for the clinician compared to the overall reporting unit, then an "**H**" will be displayed. If a number for a specific item is significantly lower for the clinician compared to the overall reporting unit, then an "**L**" will be displayed. If you hover your cursor over the "**H**" or "**L**", you can see the percentage of clients with that need for both your caseload and the reporting unit.

2. Assessed Clients List

Assessed Clients List

Client Name	Opening Date	Days Open	Age	Days Btw Tx Svcs	Avg Hrs of Svc/Month	Days Since Last Svc	CANS I	CANS 2LU	CANS LU	Needs Counts RSV	Needs Counts IMP	Needs Counts UNR
First172627 Last172627	01/12/2024	419	9	17 (41)	01:15 (00:20)	82 (80)	14		12	2	5	12
First29335 Last29335	05/21/2024	289	11	11 (24)	01:50 (00:45)	74 (53)	13					
First135274 Last135274	11/30/2020	1557	19	-- (--)	-- (--)	275 (374)	11		1	10	11	1
First116735 Last116735	05/11/2022	1030	14	-- (1)	-- (22:20)	-- (46)	13	11	10	5	5	8
First160378 Last160378	03/11/2022	1091	11	-- (13)	00:20 (00:50)	109 (45)	14	4	5	9	10	5

This chart shows each client that has been assessed within the last 12 months. It lists:

- The client's name,
- The opening date,
- The number of days the client has been open,
- The age of the client,
- The average number of days between services,
- The average hours of services per month,
- The number of days since the last service,
- The number of actionable items on the initial CANS assessment,
- The number of actionable items on the second to last update of the CANS assessment,
- The number of actionable items on the last update of the CANS assessment,
- The number of needs that have been resolved,
- The number of needs that have improved, and
- The number of needs that are unresolved.

Note: All values in parenthesis are for any service provider other than the clinician.

3. Clients Unassessed in Last 12 Months

Clients Unassessed in Last 12 Months

Client Name	Opening Date	Days Open	Age	Days Btw Tx Svcs	Avg Hrs of Svc/Month	Days Since Last Svc	Time Since Last Assessment
First48456 Last48456	03/20/2023	717	11	-- (5)	-- (03:40)	275 (62)	1 Year 11 Months
First63048 Last63048	11/08/2022	849	8	-- (15)	-- (00:50)	297 (52)	1 Year 1 Month
First84057 Last84057	09/23/2019	1991	13	-- (15)	-- (01:05)	292 (48)	No Approved/Submitted assessments yet completed.
First167560 Last167560	09/11/2023	542	11	-- (61)	-- (00:10)	207 (109)	1 Year 5 Months
First198895 Last198895	03/04/2024	367	18	-- (41)	-- (00:15)	220 (118)	1 Year

This chart shows each client that has not been assessed within the last 12 months. It lists:

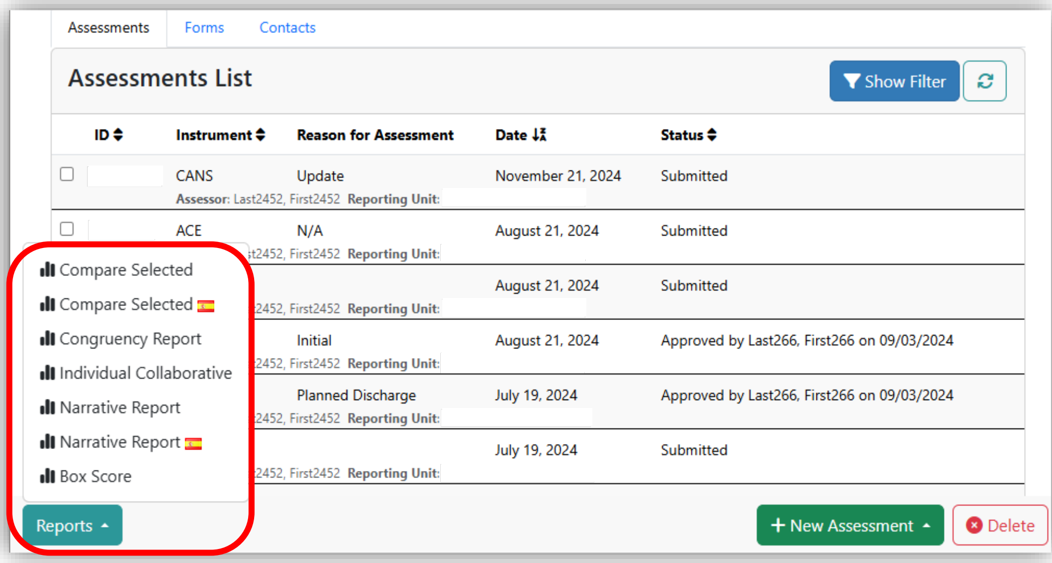
- The client’s name,
- The opening date,
- The number of days the client has been open,
- The age of the client,
- The average number of days between services,
- The average hours of services per month,
- The number of days since the last service, and
- The time since the last assessment.

Note: All values in parenthesis are for any service provider other than the clinician.

INDIVIDUAL CLIENT REPORTS

Overview

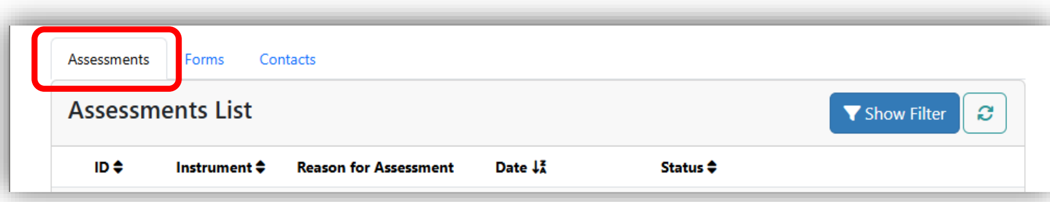
There are several reports that can be generated for a client from the client's Assessment List screen that are based on the client's assessment data.



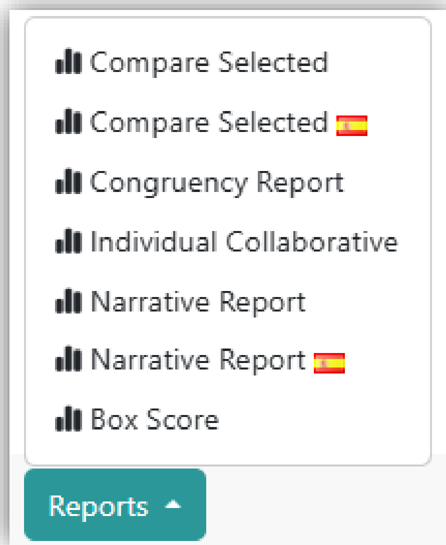
Note: Please reference the *Objective Arts Reports Manual* for an in-depth guide to various reports that can be run in OA, including guidelines on what each report is and the purpose they were intended for.

How to Access Client Reports

1. Select a client (from **Client List** or from **Viewing Your Client Workload**) and navigate to the individual's Client Page.
2. Scroll down to the client's Assessment List tab.



3. On the bottom left-hand side, click on the **Reports** button. This will open a list of reports available to be generated.

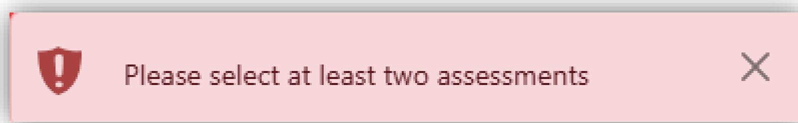


List of available Individual Client Reports.

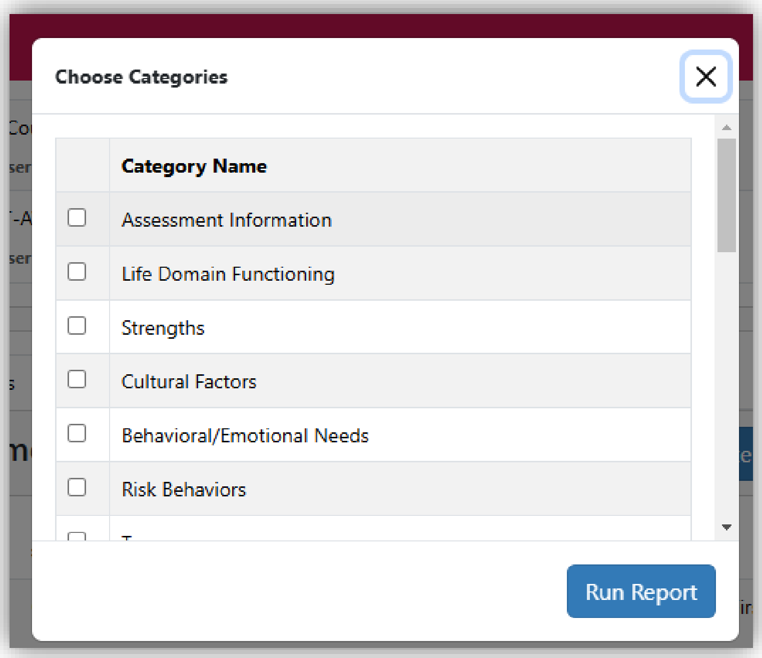
Note: A select number of reports are available in Spanish. (Please see the *Switching Languages* section on page 50).

4. Click the **name** of the report you would like to generate.

Note: Depending on the report, it may prompt you to select additional information, such as assessments, categories, reporting units, and/or episodes for it to generate.



An error message will appear when criteria is not met for the selected report.



A menu will open for reports that allow you to select parameters specific to your needs.

5. The report will open in a new tab/window or will replace your current page.

Compare Selected Report

The Compare Selected report is a side-by-side comparison of selected assessments that is used to show changes to a client's item scores over time.

Algorithms Classifications

CANS Core Needs Actionable Items	(14.0)	(16.0)
CANS Core Needs Actionable Items w/ Classifications	10-14 (14.0)	15-19 (16.0)
ICC Evaluation	ICC Evaluation Required (5-10) (7.0)	ICC Evaluation Required (5-10) (9.0)

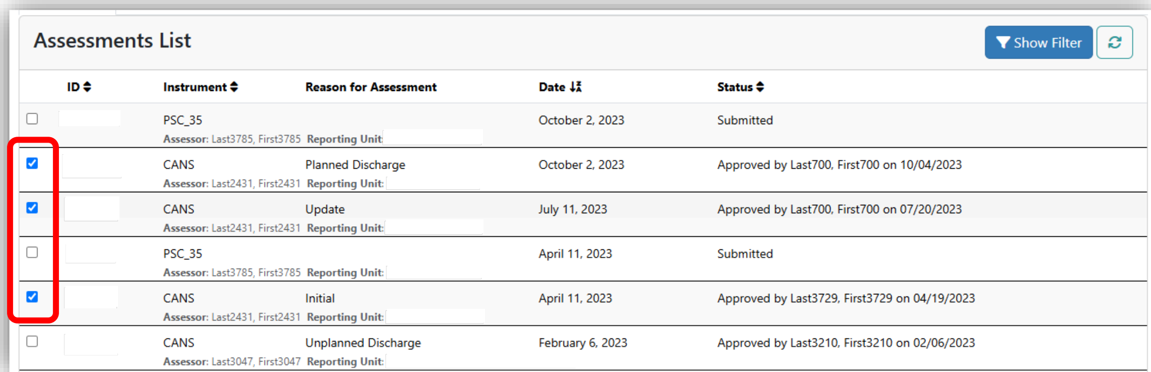
Last100001, First100001

Client ID: Id100001

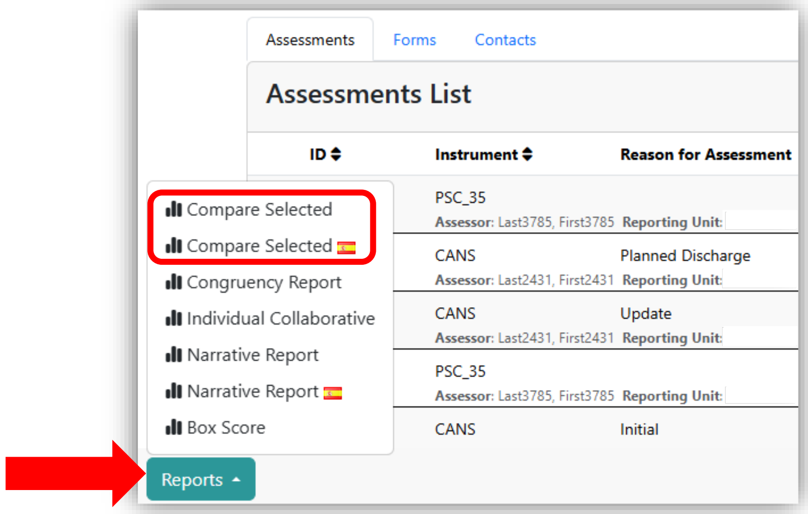
Date of Birth:

#	Question	Approved Last4163,First4163 03-21-2024 **CANS**	Approved Last4163,First4163 06-05-2024 **CANS**
Assessment Information			
	Reason for Assessment:	Update	Update
	If reason for assessment is Major Life Event, Describe:		
	Caregiver section(s) does not apply at this time	YES	YES
Life Domain Functioning			
1	Family Functioning	2	2
2	Living Situation	1	1
3	Social Functioning	3	3
4	Recreational	0	0
5	Developmental/Intellectual	1	1
6	Job Functioning	0	0
7	Legal	0	0
8	Decision Making	2	2
9	Medical/Physical	0	0
10	Sexual Development	0	0
11	Gender Identity	0	0
12	Sleep	2	0
13	School Behavior	3	3
14	School Achievement	2	2
15	School Attendance	2	2

1. From your client's Assessment List, select the assessments you would like to compare by clicking the **checkbox** to the left of each row. Up to five (5) assessments can be selected for comparison.



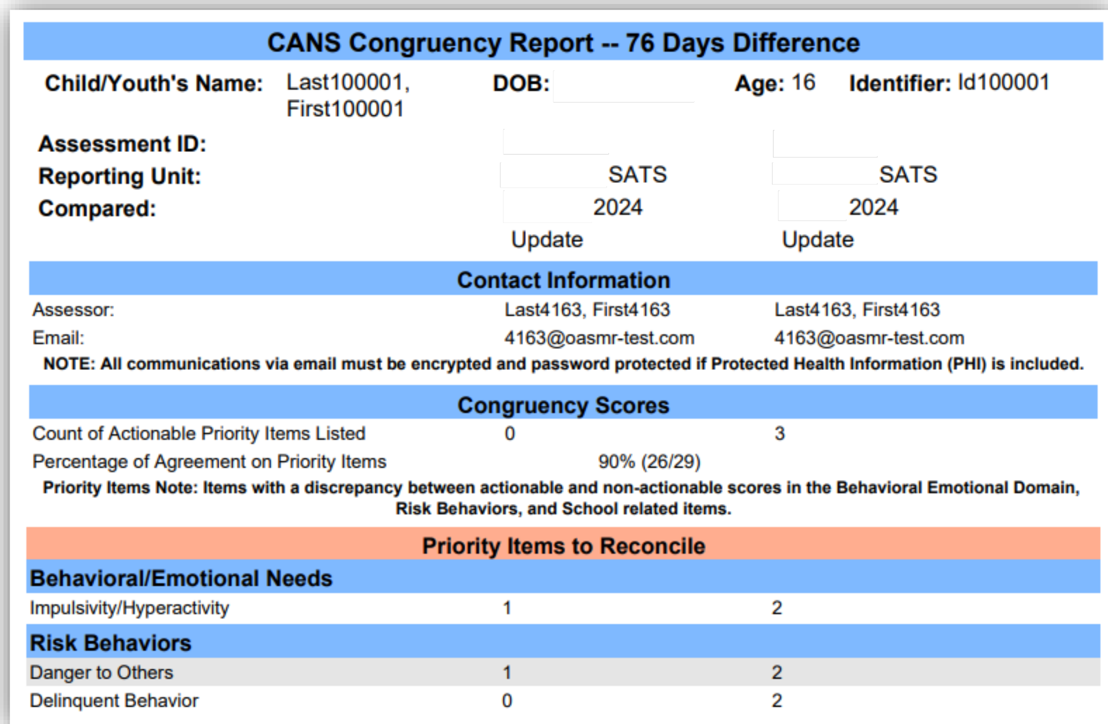
2. Click **Reports** to the bottom left of your screen and select **Compare Selected**.



Note: You can also generate the report in Spanish by selecting the **Compare Selected Report** with the Spanish flag icon next to it.

Congruency Report

The Congruency Report displays the similarities between two CANS assessments done within a time frame. The report gives a percentage of agreement on all items, as well as items with actionable needs. The purpose of this report is to create communication between different reporting units that are treating the same client.



CANS Congruency Report -- 76 Days Difference

Child/Youth's Name: Last100001, First100001 **DOB:** **Age:** 16 **Identifier:** Id100001

Assessment ID:		
Reporting Unit:	SATS	SATS
Compared:	2024 Update	2024 Update

Contact Information

Assessor:	Last4163, First4163	Last4163, First4163
Email:	4163@oasmr-test.com	4163@oasmr-test.com

NOTE: All communications via email must be encrypted and password protected if Protected Health Information (PHI) is included.

Congruency Scores

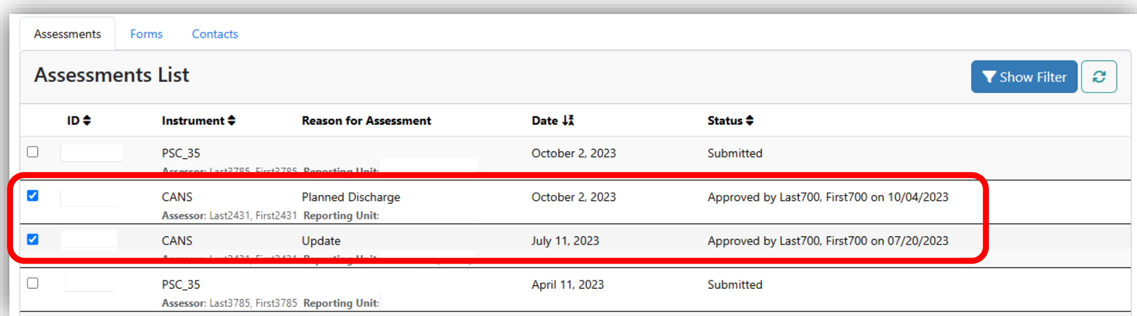
Count of Actionable Priority Items Listed	0	3
Percentage of Agreement on Priority Items	90% (26/29)	

Priority Items Note: Items with a discrepancy between actionable and non-actionable scores in the Behavioral Emotional Domain, Risk Behaviors, and School related items.

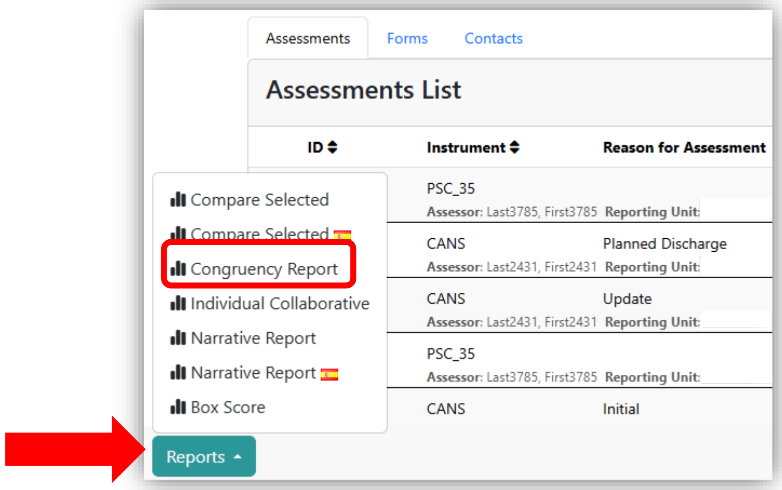
Priority Items to Reconcile

Behavioral/Emotional Needs		
Impulsivity/Hyperactivity	1	2
Risk Behaviors		
Danger to Others	1	2
Delinquent Behavior	0	2

1. From your client's Assessments List, select only two assessments by clicking the **checkbox** to the left of each row.



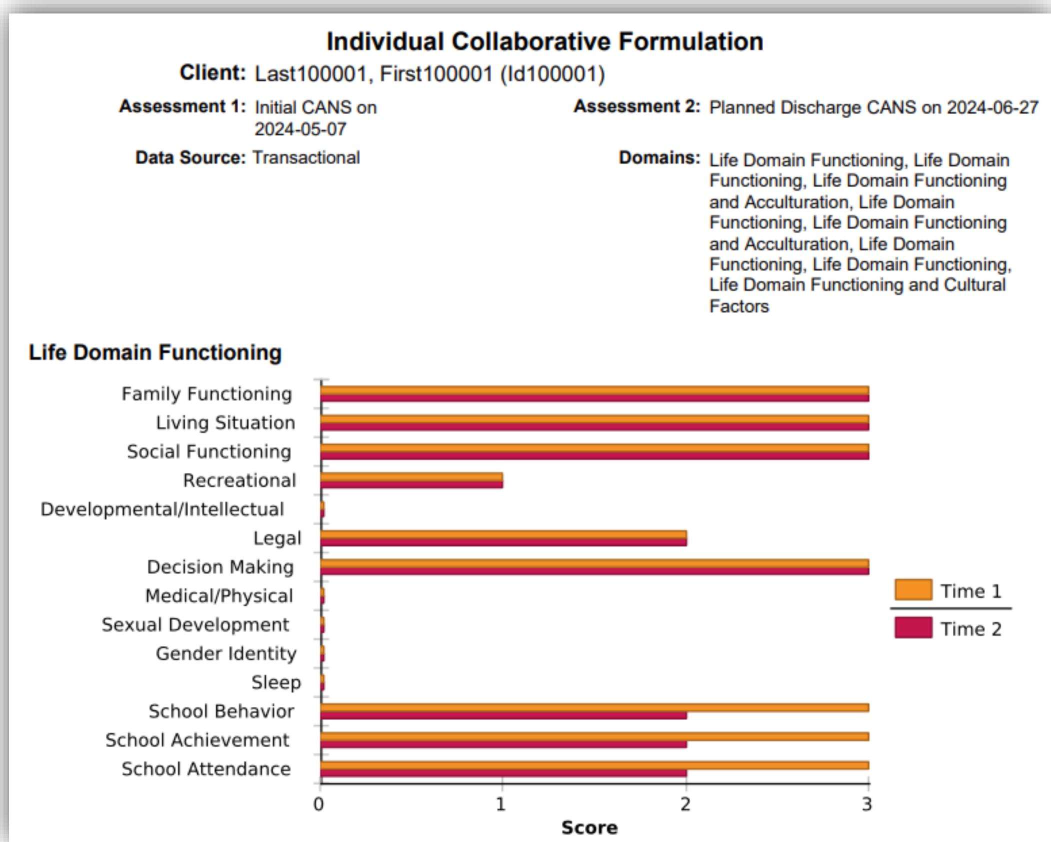
2. Click **Reports** to the bottom left of your screen and select **Congruency Report**.



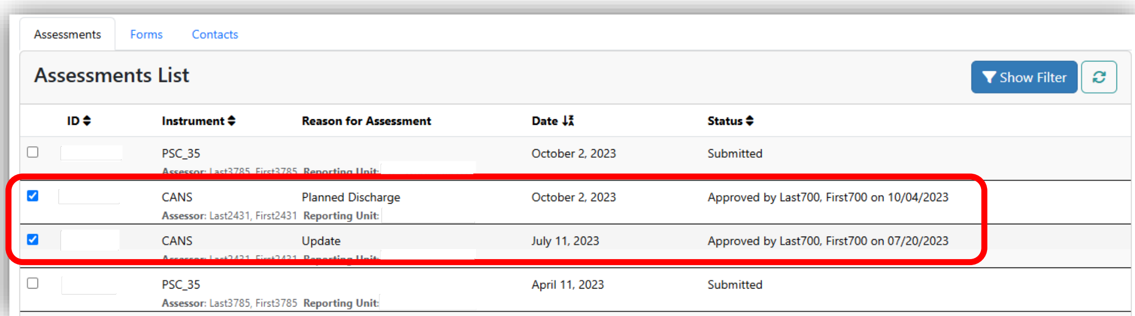
Once the congruency reports is selected, it will automatically populate in a new window.

Individual Collaborative Report

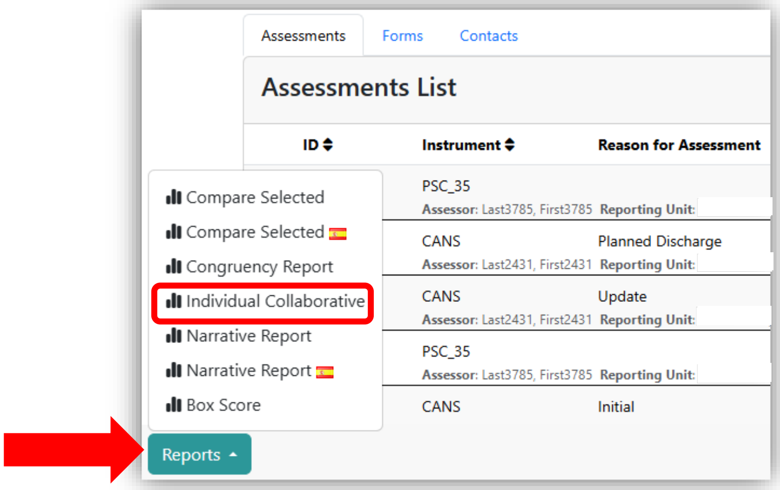
The Individual Collaborative Report graphically represents a comparison of Time 1 and Time 2 *(e.g. Initial versus Update)* assessment scores.



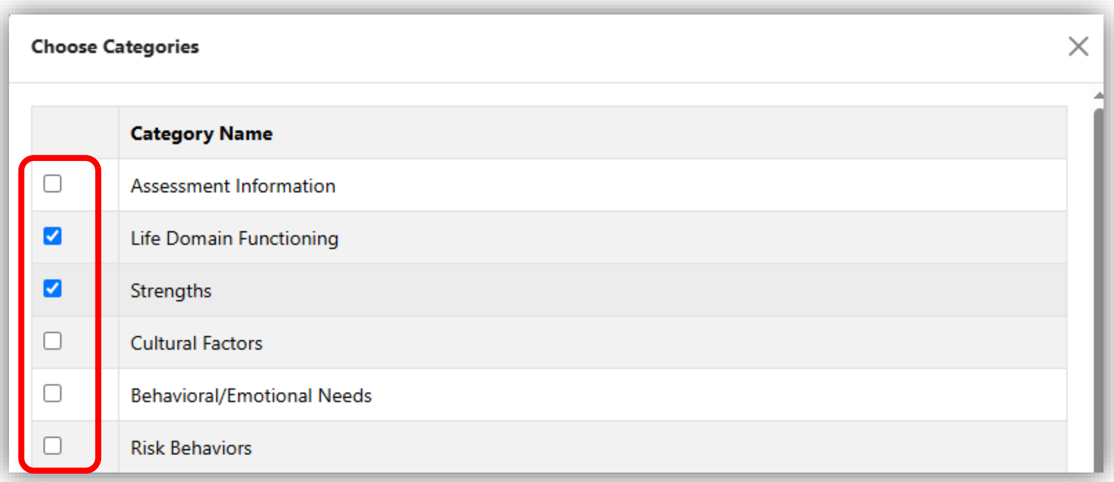
1. From your client's Assessments List, select two assessments by clicking the **checkbox** to the left of each assessment row.



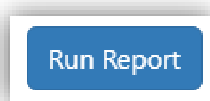
2. Click **Reports** to the bottom left of your screen and select **Individual Collaborative.**



3. A screen will appear with the different assessment categories available. Click on the checkboxes to the right of the **Category Name(s)** you would like to include in your report.



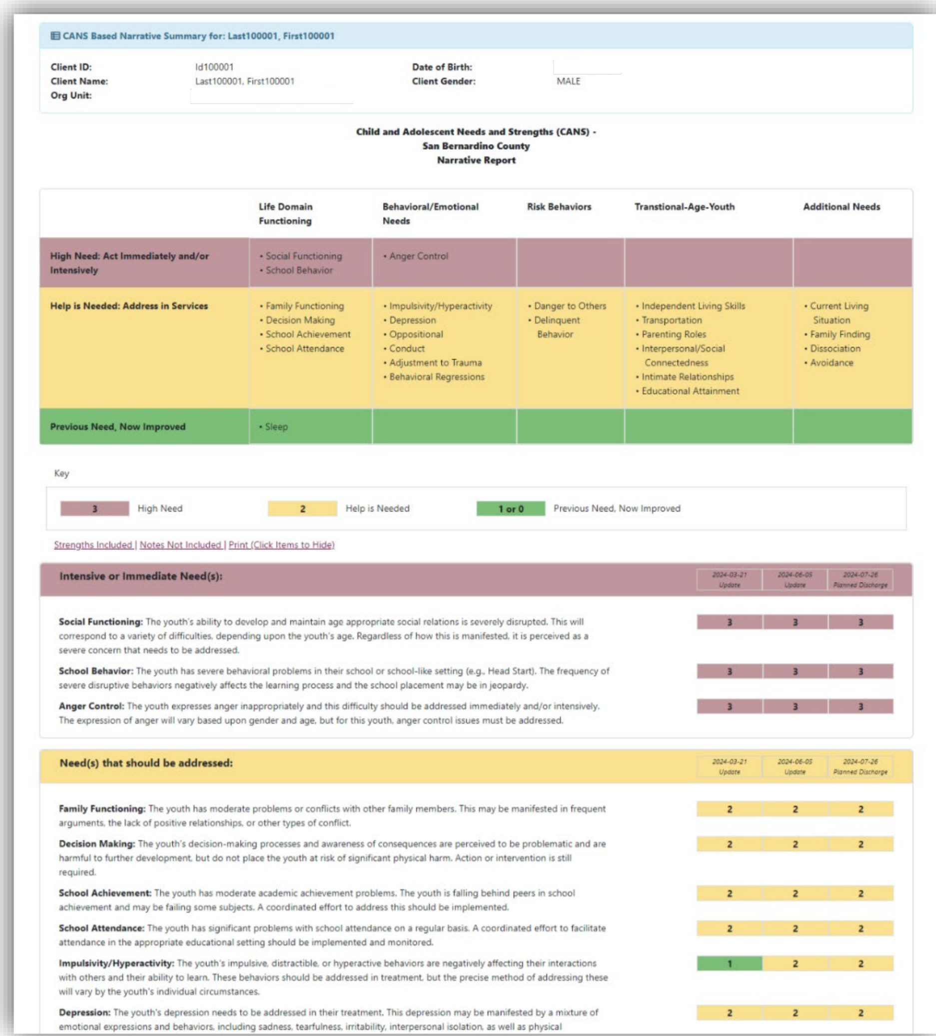
4. Click Run Report at the bottom right of the window to generate your report.



Narrative Report

The Narrative Report was created to provide an efficient way to share CANS information with others. It is especially suited for review at Child & Family Team Meetings. Specific items may be hidden at the clinician's discretion *(e.g. substance abuse, sexuality, etc.).*

Note: Reports shared at Child & Family Team Meetings contain Protected Health Information (PHI). Please use good clinical judgment regarding who may keep a copy of the Narrative Report.



CANS Based Narrative Summary for: Last100001, First100001

Client ID:	Id100001	**Date of Birth:**	
Client Name:	Last100001, First100001	**Client Gender:**	MALE
Org Unit:			

Child and Adolescent Needs and Strengths (CANS) -
San Bernardino County
Narrative Report

	Life Domain Functioning	Behavioral/Emotional Needs	Risk Behaviors	Transtional-Age-Youth	Additional Needs
High Need: Act Immediately and/or Intensively	• Social Functioning • School Behavior	• Anger Control			
Help is Needed: Address in Services	• Family Functioning • Decision Making • School Achievement • School Attendance	• Impulsivity/Hyperactivity • Depression • Oppositional • Conduct • Adjustment to Trauma • Behavioral Regressions	• Danger to Others • Delinquent Behavior	• Independent Living Skills • Transportation • Parenting Roles • Interpersonal/Social Connectedness • Intimate Relationships • Educational Attainment	• Current Living Situation • Family Finding • Dissociation • Avoidance
Previous Need, Now Improved	• Sleep				

Key

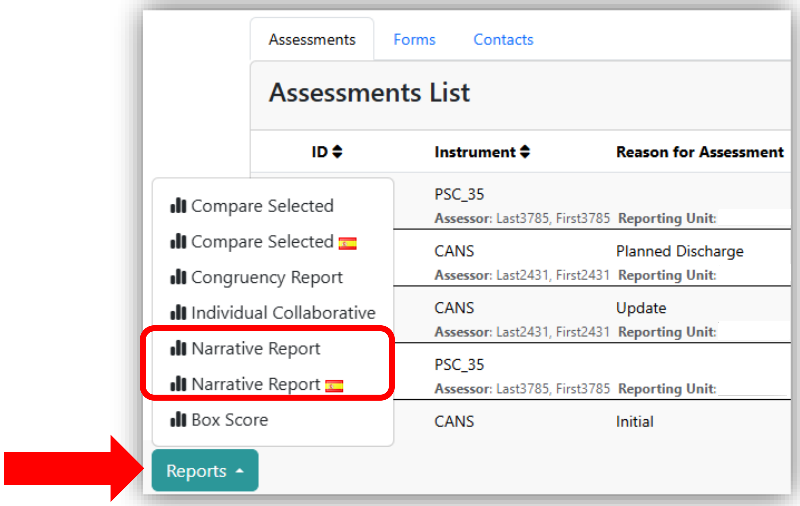
3 High Need | 2 Help is Needed | 1 or 0 Previous Need, Now Improved

Strengths Included | Notes Not Included | Print (Click Items to Hide)

Intensive or Immediate Need(s):	2024-03-21 Update	2024-06-05 Update	2024-07-26 Planned Discharge
Social Functioning: The youth's ability to develop and maintain age appropriate social relations is severely disrupted. This will correspond to a variety of difficulties, depending upon the youth's age. Regardless of how this is manifested, it is perceived as a severe concern that needs to be addressed.	3	3	3
School Behavior: The youth has severe behavioral problems in their school or school-like setting (e.g., Head Start). The frequency of severe disruptive behaviors negatively affects the learning process and the school placement may be in jeopardy.	3	3	3
Anger Control: The youth expresses anger inappropriately and this difficulty should be addressed immediately and/or intensively. The expression of anger will vary based upon gender and age, but for this youth, anger control issues must be addressed.	3	3	3

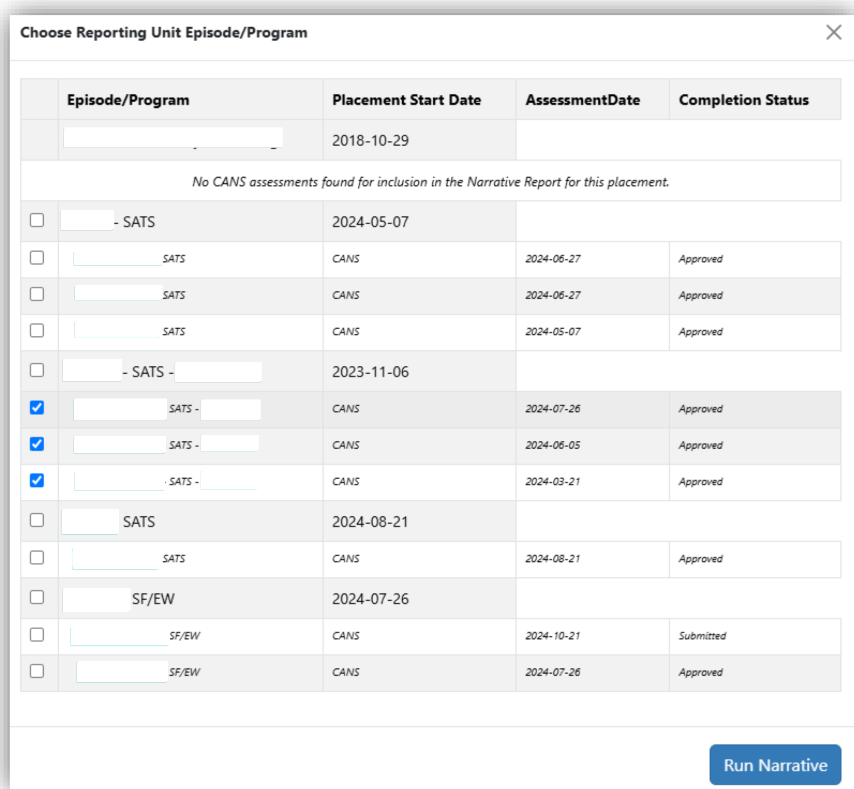
Need(s) that should be addressed:	2024-03-21 Update	2024-06-05 Update	2024-07-26 Planned Discharge
Family Functioning: The youth has moderate problems or conflicts with other family members. This may be manifested in frequent arguments, the lack of positive relationships, or other types of conflict.	2	2	2
Decision Making: The youth's decision-making processes and awareness of consequences are perceived to be problematic and are harmful to further development, but do not place the youth at risk of significant physical harm. Action or intervention is still required.	2	2	2
School Achievement: The youth has moderate academic achievement problems. The youth is falling behind peers in school achievement and may be failing some subjects. A coordinated effort to address this should be implemented.	2	2	2
School Attendance: The youth has significant problems with school attendance on a regular basis. A coordinated effort to facilitate attendance in the appropriate educational setting should be implemented and monitored.	2	2	2
Impulsivity/Hyperactivity: The youth's impulsive, distractible, or hyperactive behaviors are negatively affecting their interactions with others and their ability to learn. These behaviors should be addressed in treatment, but the precise method of addressing these will vary by the youth's individual circumstances.	1	2	2
Depression: The youth's depression needs to be addressed in their treatment. This depression may be manifested by a mixture of emotional expressions and behaviors, including sadness, tearfulness, irritability, interpersonal isolation, as well as physical	2	2	2

1. From your client's Client Page, click **Reports** to the bottom left of your screen and select **Narrative Report**.



Note: You do not have to select any assessments from the client's Assessment List.

2. When this report is selected, a pop-up window will appear showing the client's history of submitted and approved assessments grouped by episode. Select up to three (3) assessments to compare.

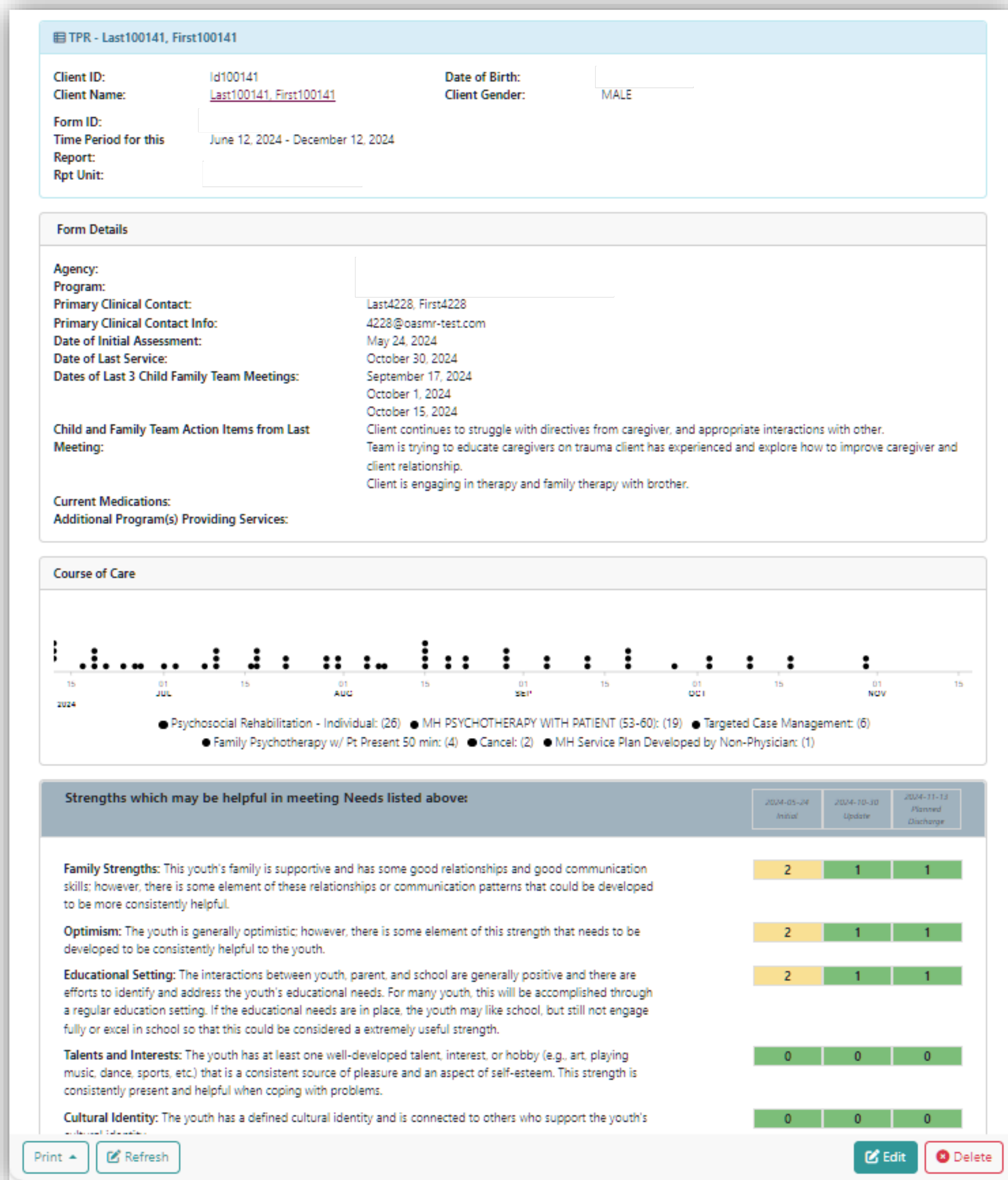


Note: For a breakdown of the additional features that the Narrative Report has, please refer to the Narrative Report section of the Objective Arts Reports Manual.

Additionally, you can also generate the report in Spanish by selecting the **Narrative Report** with the Spanish flag icon next to it.

Treatment Progress Report

The Treatment Progress Report (TPR) provides information on how your client's treatment is progressing. The report includes items prepopulated from OA and myAvatar and allows for input by the clinician via open text and dropdown menus. In creating these reports, it is important that the clinician is mindful of their audience when selecting which items are to be displayed. Items in the report can be "hidden" so they are not seen on the printed report.


TPR - Last100141, First100141

Client ID: Id100141
Client Name: Last100141, First100141
Date of Birth:
Client Gender: MALE
Form ID:
Time Period for this Report: June 12, 2024 - December 12, 2024
Rpt Unit:

Form Details

Agency:
Program:
Primary Clinical Contact: Last4228, First4228
Primary Clinical Contact Info: 4228@oasmr-test.com
Date of Initial Assessment: May 24, 2024
Date of Last Service: October 30, 2024
Dates of Last 3 Child Family Team Meetings: September 17, 2024
October 1, 2024
October 15, 2024
Child and Family Team Action Items from Last Meeting: Client continues to struggle with directives from caregiver, and appropriate interactions with other.
Team is trying to educate caregivers on trauma client has experienced and explore how to improve caregiver and client relationship.
Client is engaging in therapy and family therapy with brother.
Current Medications:
Additional Program(s) Providing Services:

Course of Care

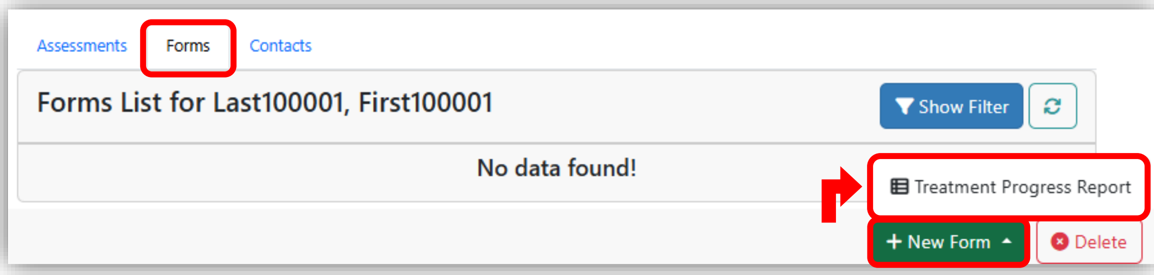
Strengths which may be helpful in meeting Needs listed above:

	2024-05-24 Initial	2024-10-30 Update	2024-11-13 Planned Discharge
Family Strengths: This youth's family is supportive and has some good relationships and good communication skills; however, there is some element of these relationships or communication patterns that could be developed to be more consistently helpful.	2	1	1
Optimism: The youth is generally optimistic; however, there is some element of this strength that needs to be developed to be consistently helpful to the youth.	2	1	1
Educational Setting: The interactions between youth, parent, and school are generally positive and there are efforts to identify and address the youth's educational needs. For many youth, this will be accomplished through a regular education setting. If the educational needs are in place, the youth may like school, but still not engage fully or excel in school so that this could be considered a extremely useful strength.	2	1	1
Talents and Interests: The youth has at least one well-developed talent, interest, or hobby (e.g., art, playing music, dance, sports, etc.) that is a consistent source of pleasure and an aspect of self-esteem. This strength is consistently present and helpful when coping with problems.	0	0	0
Cultural Identity: The youth has a defined cultural identity and is connected to others who support the youth's cultural identity.	0	0	0

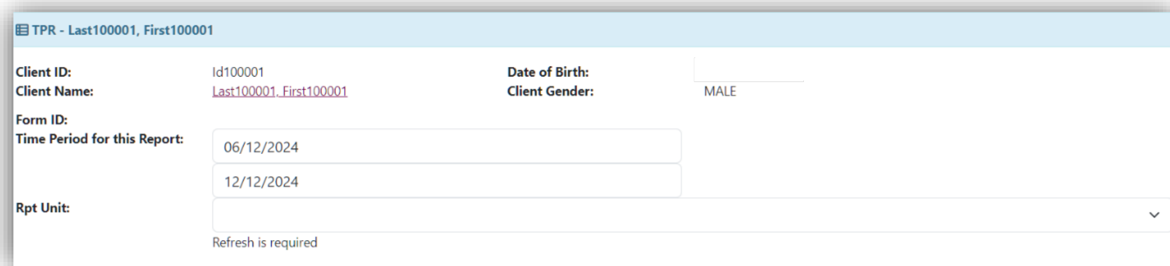
Print Refresh Edit Delete

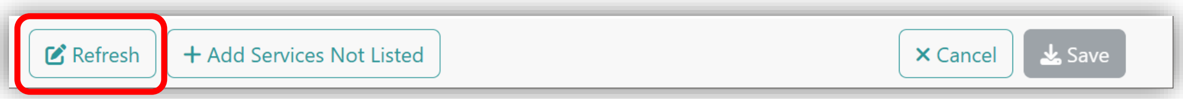
1. Open the client's **Client Page**.

2. Scroll down to the client's **Assessments List**. It is located below the **Open and Recently Closed Placements** section.
3. Click on the **Forms** tab. It is the tab to the right of the **Assessments List**. From this tab you can view previously generated TPRs for this client.
4. To create a new TPR, click on the **New Form** button and select **Treatment Progress Report**.



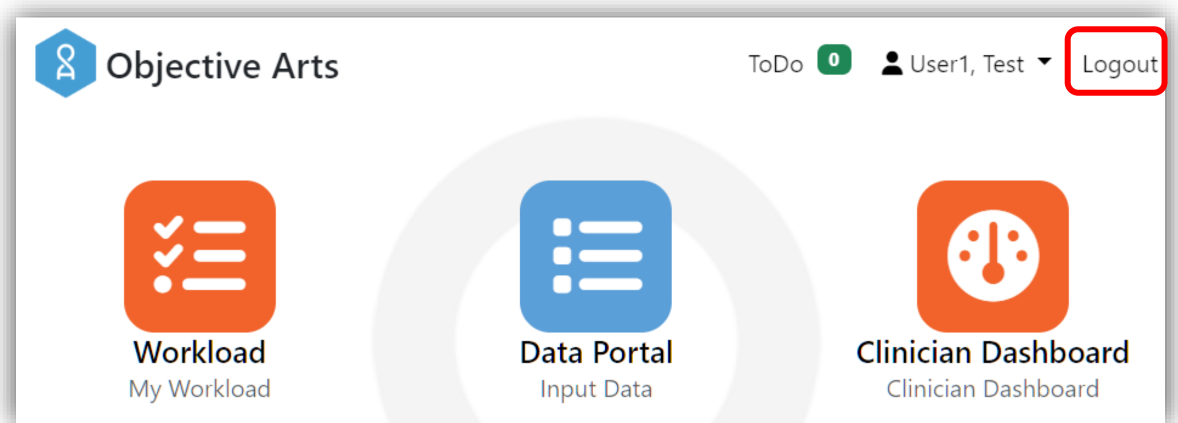
5. Keep or change the dates in the "*Time Period for this Report*" field to the desired timeframe, then select the **Rpt Unit (Reporting Unit),** and press the **Refresh** in the bottom left corner to generate the report.



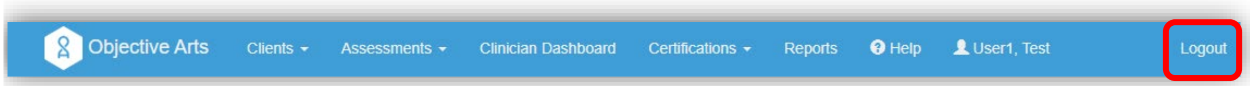


LOGGING OUT

1. To log out of Objective Arts, click **Logout** at the top right of the screen.
   - From the Home screen, click **Logout.**



   - From all other screens with a toolbar, click **Logout**.



To ensure maximum security, please close your browser after your OA session is complete.

BEST PRACTICES

1. Review the Frequently Asked Questions (FAQ) guide found on the DBH Transformational Collaborative Outcomes Management (TCOM) website https://wp.sbcounty.gov/dbh/tcom/.
    - It provides step-by-step guidance for these topics:
        - Site navigation
        - Administrative activities
        - CANS/ANSA assessments
        - Tickler report

2. Reach out to your Subject Matter Expert (SME).
    - SMEs are technical experts in the OA program for your organization. Your SME can help resolve OA issues, including:
        - Creating your OA Production (LIVE) account
        - Logging in and resetting your password
        - Problems completing an assessment
        - Problems with missing client data
        - Questions about OA reports
    - For issues that are beyond your SME's scope of knowledge, they will contact the DBH-OA Inbox directly

3. Maintain good myAvatar sequencing habits.
    - Sometimes, myAvatar does not communicate well with OA. Please be mindful of these components:
        - **Sequencing:** Start with the program assignment first, then follow with the assessment
        - **Reporting Unit:** Choose your correct reporting unit location. OA does not recognize *00036* as a valid reporting unit. It is the overarching episode for San Bernardino County
        - **Dates:** Be sure the assessment you are creating falls within the open and close dates of the program assignment
        - **Housekeeping:** Don't forget about the assessments still in Draft. Be sure to submit the assessment to Final when complete

4. Keep your account active.
    - OA will deactivate your account if you have no activity within 180 days
        - Login at least once every 6 months to keep your account active
    - Contact your SME if you have any issues logging into your account
    - Verify your email address with your SME to ensure that it's up to date on your account
        - Confirm any name, position, and/or role changes with your SME

5. Explore the DBH TCOM website: https://wp.sbcounty.gov/dbh/tcom/.

- The website hosts additional information including:
  - How TCOM is utilized in San Bernardino County
  - A breakdown of the **Clinical Staff Pathway** for providers
  - Training opportunities for our Basic and SME courses, and
  - Supplemental instructional material