San Bernardino County

Objective Arts

Subject Matter Expert Manual

Revised 01/2026

SAN BERNARDINO COUNTY | Behavioral Health

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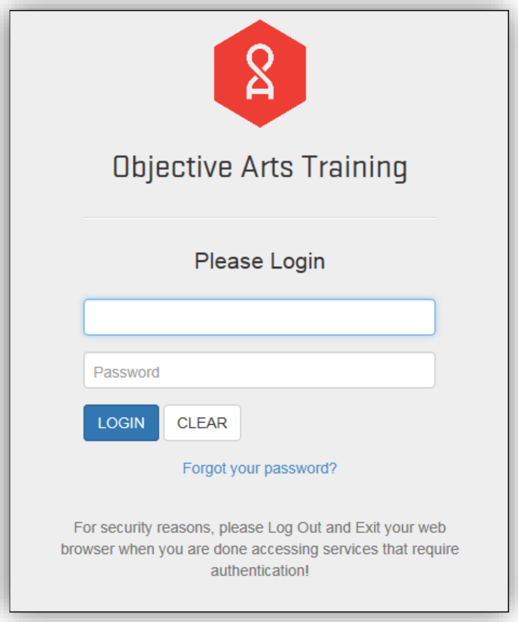
IMPORTANT NOTICE

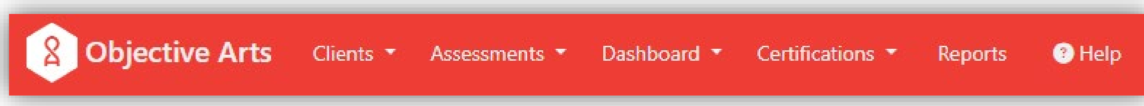
This document is dynamic; as changes are made, new versions will be posted to the website. Please check back periodically for updates.

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 website.

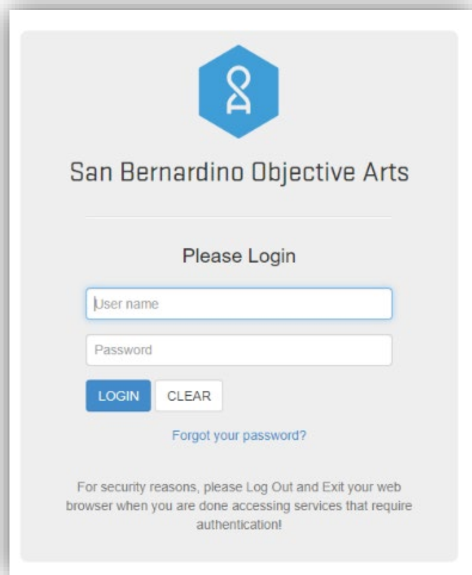
Objective Arts Website Versions:

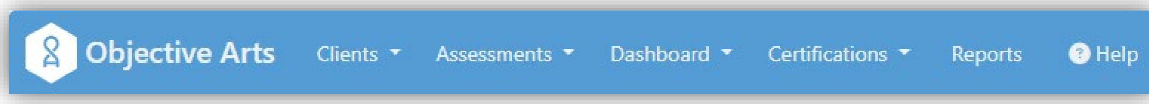
- Training (TRAIN)
    - Link: https://training-sbcans.oasmr.com
- The emblem and toolbar color to identify the OA Training (TRAIN) Site is Red.





- Production (LIVE)
    - Link: https://sbcans.oasmr.com
- The emblem and toolbar color to identify the 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.

OBJECTIVE ARTS (OA) SUBJECT MATTER EXPERT EXPECTATIONS AND RESPONSIBILITIES

Subject Matter Experts (SME) are technical experts in the Objective Arts program for their agency. SMEs are the point person, or "Help Desk", for all OA-related questions asked by your agency's staff. SMEs assist with helping staff with logging in, data entry issues, technical errors, etc. The San Bernardino County Department of Behavioral Health (DBH) recommends that each program designates at least two staff members as SMEs: one serving as a primary, the other as backup to ensure adequate coverage during times of leave.

Note: The San Bernardino County Information Technology Department (ITD) Help Desk and DBH Information Technology (IT) Help Desk do not provide support for Objective Arts.

Prerequisites:
1. Attend OA Basic Training **OR** be trained by the agency trainer.
2. Attend SME and Reports Trainings.

Expectations:
1. Must have an OA role (such as Office Assistant, Supervisor, Clinical Admin, or Domain Clinical Admin), with permissions to create staff profiles, enter Transformational Collaborative Outcomes Management (TCOM) assessments, enter 0-5 measurements for applicable programs, and extract data and reports.
2. Have a working knowledge on all OA basic tasks.

Responsibilities (*including but not limited to*):
- ✓ Manage User Profiles
    - a. Create user Profiles
    - b. Assign/remove a role
    - c. Add/remove placements
    - d. Reset passwords
    - e. Activate user profiles
    - f. Deactivate user profiles
        - i. This action must be taken IMMEDIATELY, or no later than by the close of the next business day, upon employee terminations.
        - ii. User profiles must be deactivated in both the OA TRAIN and LIVE sites.
- ✓ Monitor organizational elements
    - a. Export staff data to CSV files
    - b. Temporarily re-open client's placement
    - c. Assign the NoTCOM service tag to non-TCOM staff
- ✓ Create and run reports (*please see the Objective Arts Reports Manual* for more information)
    - a. Report type

i. Assessment Item Heat Map
ii. Algorithm – Client Scores by Organizational Unit (OU)
iii. Expected Assessments
iv. Impact
v. Outcome Snapshot
vi. Reliable Change Index
vii. Tickler

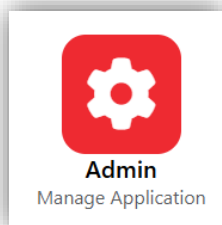
- ✓ Train agency staff or refer staff to OA training(s) in collaboration with DBH Workforce, Education, and Training (WET).

SITE NAVIGATION

Navigating to the Administer Staff Screen

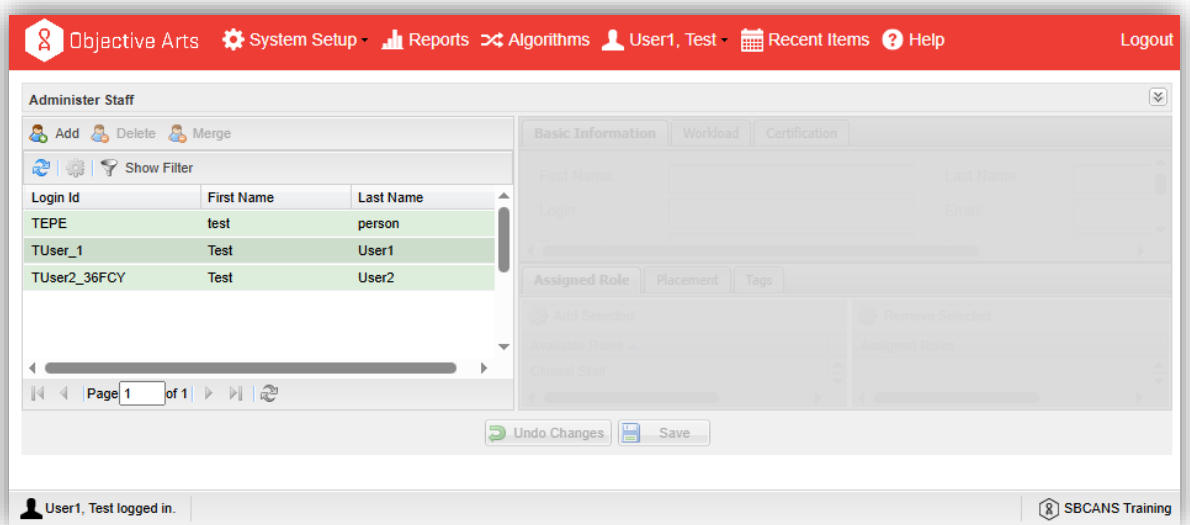
Note: All steps listed in this manual can be completed in both the TRAIN and the LIVE sites. This will allow you, as the SME, to be able to create both Training and Production accounts for your staff. Please feel free to use TRAIN to test actions before they are completed in LIVE.

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



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

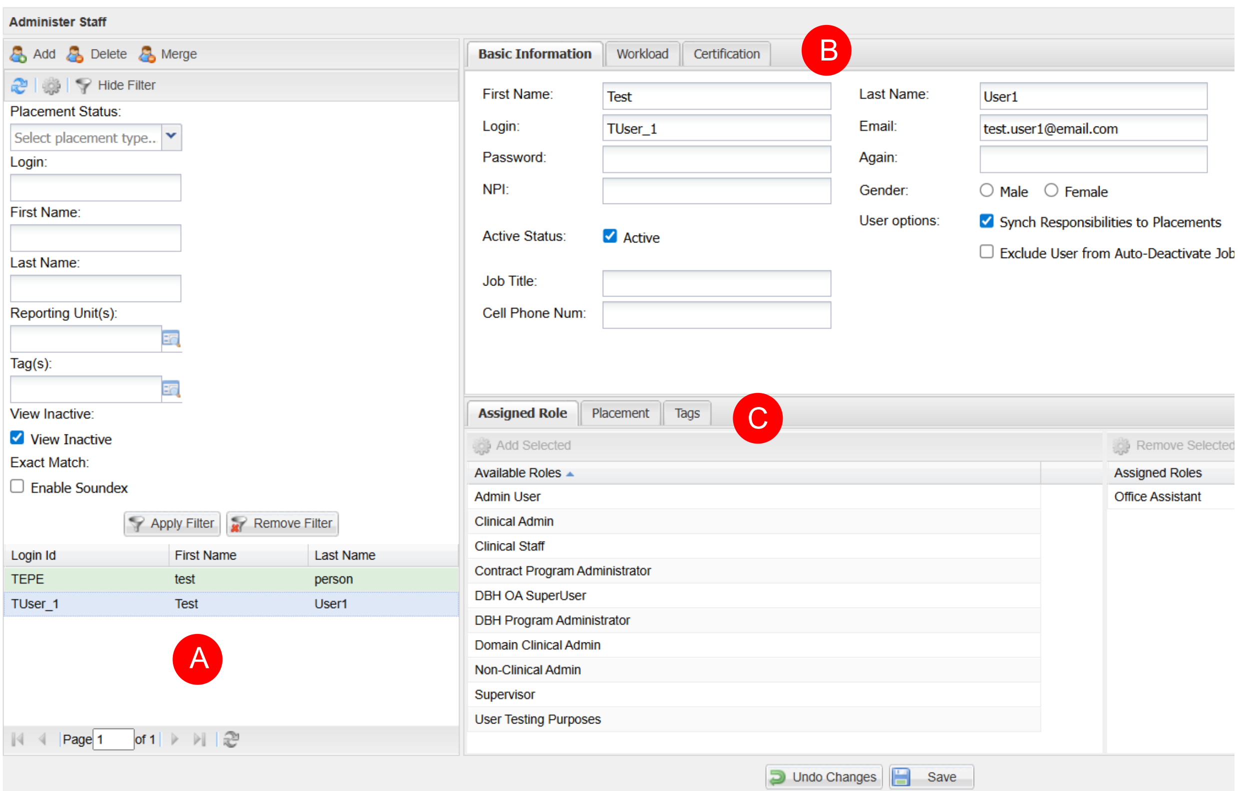
The Administer Staff screen will appear as the following:



Administer Staff Page

One of the main tasks of an SME is managing staff accounts. Many of these tasks are completed in the Administer Staff page in Objective Arts. The Administer Staff page consists of three main sections:

A. The Staff List,
B. Staff Basic Information, Workload, and Certifications tabs, and
C. Staff Assigned Roles, Placement, and Tags tabs.

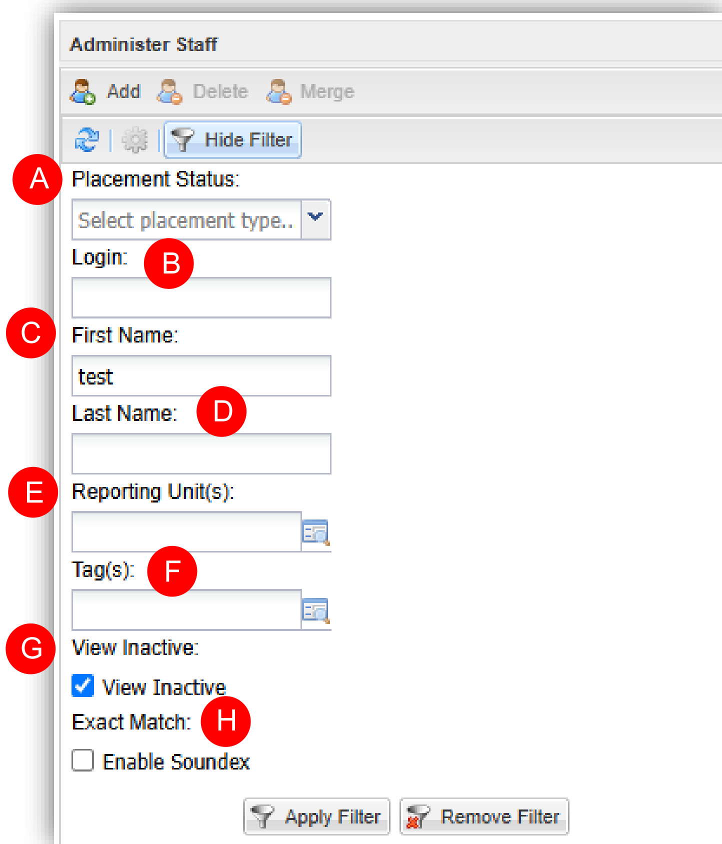


Administer Staff Page – Main Sections

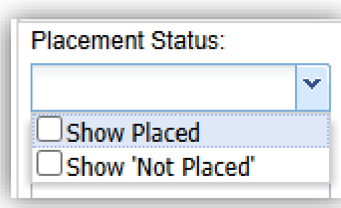
A. Staff List	Shows all staff visible to your Reporting Unit(s) and/or staff based on the filter you apply.
B. Staff Basic Information, Workload, and Certifications	Tabs to view and edit staff information, including the ability to reset passwords.
C. Staff Assigned Roles, Placements, and Tags	Tabs to view and edit a staff member's assigned role, placement(s), and/or tags.

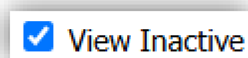
Filtering the Staff List

1. Click the **Show Filter** button on the left-hand side of the screen. The filter menu will open.
   - By default, the list:
     - displays all placed staff sharing the same RU(s) as you, and
     - is sorted by the last name.
2. Use the search boxes listed below to narrow down your search as best as possible to avoid creating duplicate profiles.

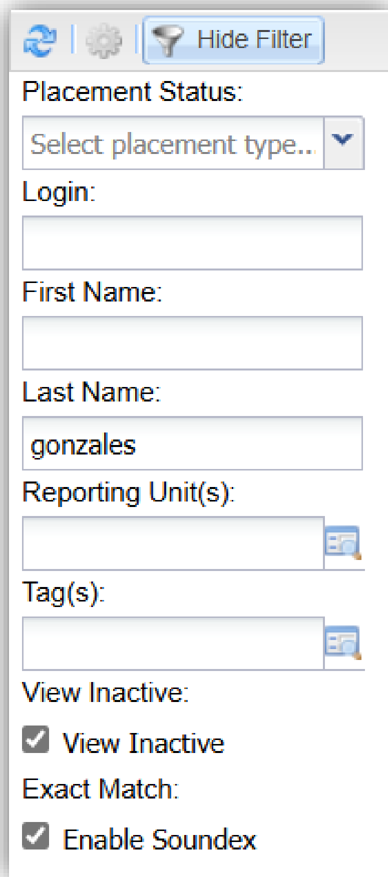


Staff List Filter Options

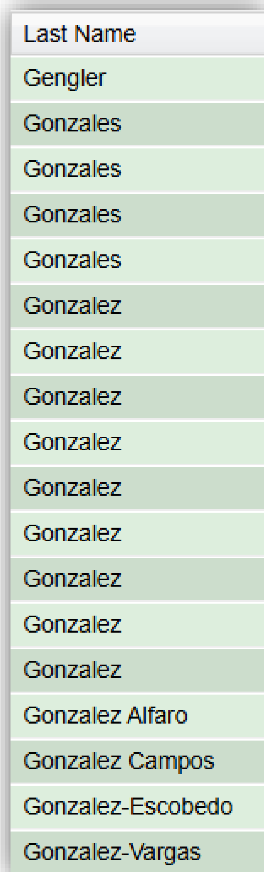
A. Placement Status	Placement Status has two options to filter with: 

<table>
<tr><td></td><td>To determine which item to check, select the guidance below:
<table>
<tr><th>If you only want to see staff that …</th><th>Then check…</th></tr>
<tr><td>have a placement,</td><td>Show Placed.</td></tr>
<tr><td>do not have a placement,</td><td>Show ‘Not Placed’.</td></tr>
<tr><td>have and do not have a placement,</td><td>Both options (Show Placed and Show ‘Not Placed’).</td></tr>
</table>
</td></tr>
<tr><td>B. Login</td><td>Filter by the staff member’s username.</td></tr>
<tr><td>C. First Name</td><td>Filter by the first name of the staff member.</td></tr>
<tr><td>D. Last Name</td><td>Filter by the last name of the staff member.</td></tr>
<tr><td>E. Reporting Unit(s)</td><td>Filter by one or more reporting unit(s).</td></tr>
<tr><td>F. Tag(s)</td><td>Filter by specific tags that have been assigned to the staff member.</td></tr>
<tr><td>G. View Inactive</td><td>When checked, it includes inactive User Profiles in your search results. This option is ON by default.


Note: It is recommended that the View Inactive box, located above Apply Filter, is always checked. This will expand your search as much as possible.</td></tr>
<tr><td>H. Exact Match</td><td>When checked, it enables Soundex. It is a feature that includes User Profiles based on the phonetic sound of your entered search criteria, rather than by the exact spelling. It is useful when the spelling is uncertain.</td></tr>
</table>



Last Name "Gonzales", Soundex enabled.



Search Results.

Note: It is NOT necessary to enter information in all the search boxes. Nor do you need to enter a complete name or number. You may enter as much or as little information as necessary.

3. Once you have entered all your desired search criteria, click **Apply Filter.**

4. If you need to remove all the criteria entered, click on **Remove Filter**.

MANAGING USER PROFILES

As an SME, you are responsible for setting up and editing your staff's accounts in OA. Prior to creating a new account for your staff, it is recommended that you first search for an existing account (active or inactive) for your staff.

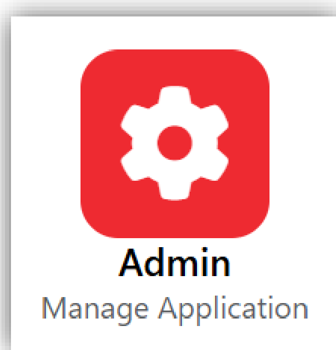
You will have one of three scenarios:

If	And	Then
A staff account **is** found,	Staff can verify that it was their prior account,	Update information in the existing staff account.
A staff account **is** found,	Staff cannot verify the account*,	Create a new staff account.
A staff account **cannot** be found,		Create a new staff account.

* *Such as in the case of those with similar names.*

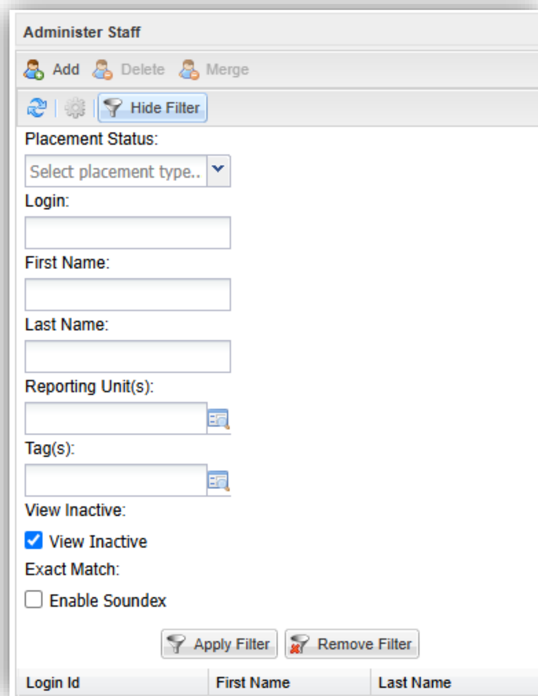
Searching for Prior Staff Accounts

1. From the Home Screen, click the **Admin** box to access the Administer Staff screen to search for an existing account.

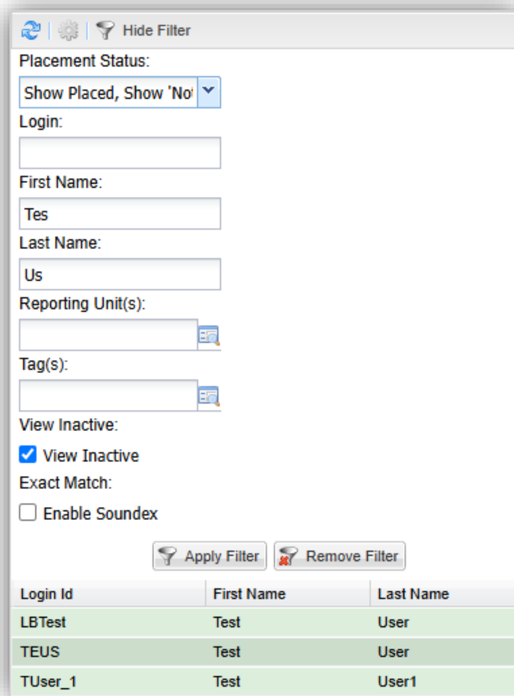


2. Click on the 

icon. This will open the **Filter** list.



Opened Filter List



Example for searching up “User, Test”.

3. Enter the staff member’s information into the search parameters.

   <u>Recommended Search Parameters (*as applicable*):</u>
   - **Placement Status:**
     - Check “**Show Placed**” and “**Show ‘Not Placed’**”.
   - **First Name:**
     - Enter in the first 3-5 letters of the staff member’s name.
   - **Last Name:**
     - Enter in the first 3-5 letters of the staff member’s last name.
   - **View Inactive:**
     - Keep this box **checked**.

Note: Entering in just the first few letters of the staff member’s name is a safe way to find existing accounts without restricting your results to a specific name that may have changed or is spelled differently than what you would expect.

4. Click **Apply Filter** to refresh the staff list to show results based on the Filter settings you applied. Alternatively, to clear search results from the filter, click **Remove Filter**.

Staff Username Requirements

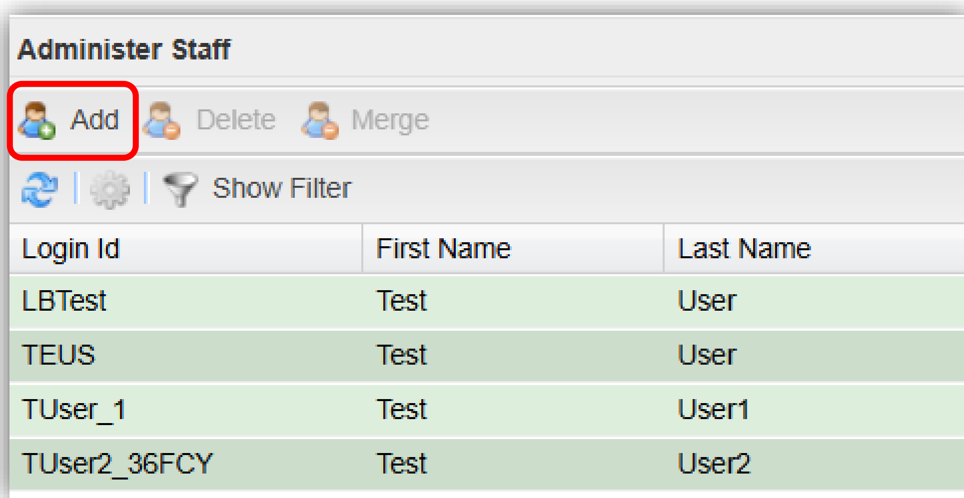
To update or to create a new Staff account, you will need to utilize a username that falls within one of the following formatting conventions:

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

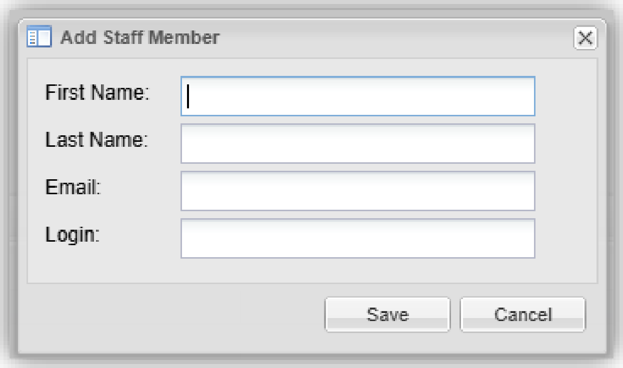
Note: Only a clinical login should be used to complete clinical actions in the website. If the Clinical Staff member does not have a myAvatar staff ID number and needs one, then complete the DBH – IT Staff Master form to request a new ID number.

Creating a New Staff Account

1. After Searching for Prior Staff Accounts and verifying that no prior account exists, you can create a new account. To create a new account for a staff member, click the **Add** button located on the top left of the screen.

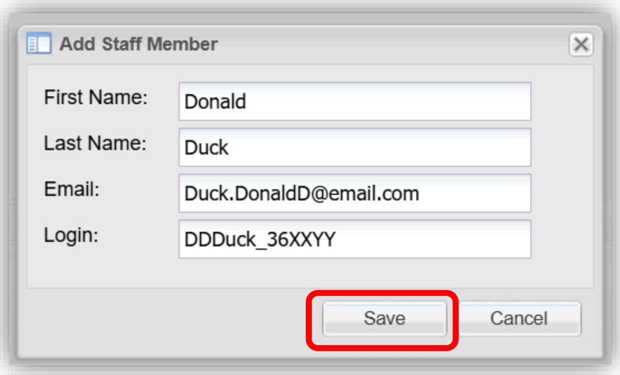


2. A dialog box will open. Enter the staff members' information:
    - First name
    - Last name
    - Email (match the email used for Schoox, if applicable)
    - Login (see *Staff Username Requirements* on page 14)



Note: All fields are required to be completed for a new account.

3. Click the **Save** button to apply your changes.

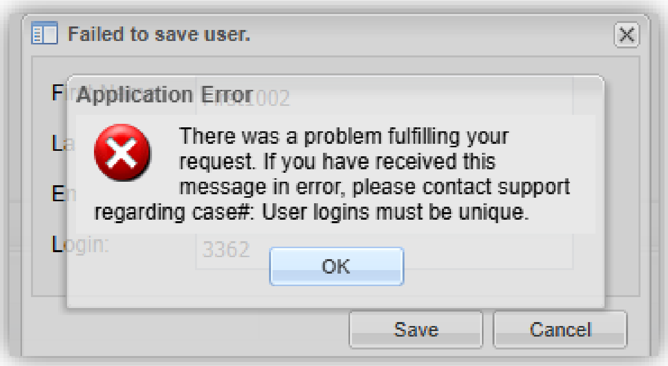


Example:
Donald Duck is a Non-DBH/clerical staff member for RU 36XXYY.

4. Follow the steps for *Searching for Prior Staff Accounts* section on page 12 to locate the account you have just created. Please remember to check the "Not Placed" option under Placement Status as the account will not be able to be located otherwise.

Possible Errors When Creating New Staff Account

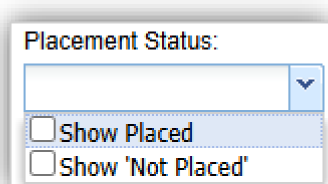
When creating a new staff account, user logins must be unique and not tied to another user. If the following error screen is returned, it means that the login ID/username you are entering for the new account already exists in the system. Please return to your search and adjust your filter settings until you find the existing account. That account may be eligible for reactivation. Verify with your staff that the existing profile matches what the staff has used before in the past.



1. Click the **Show Filter** button to filter down to the staff member.

Note: Refer to the *Filtering the Staff List* section on page 9 for guidance on what each filter option does.

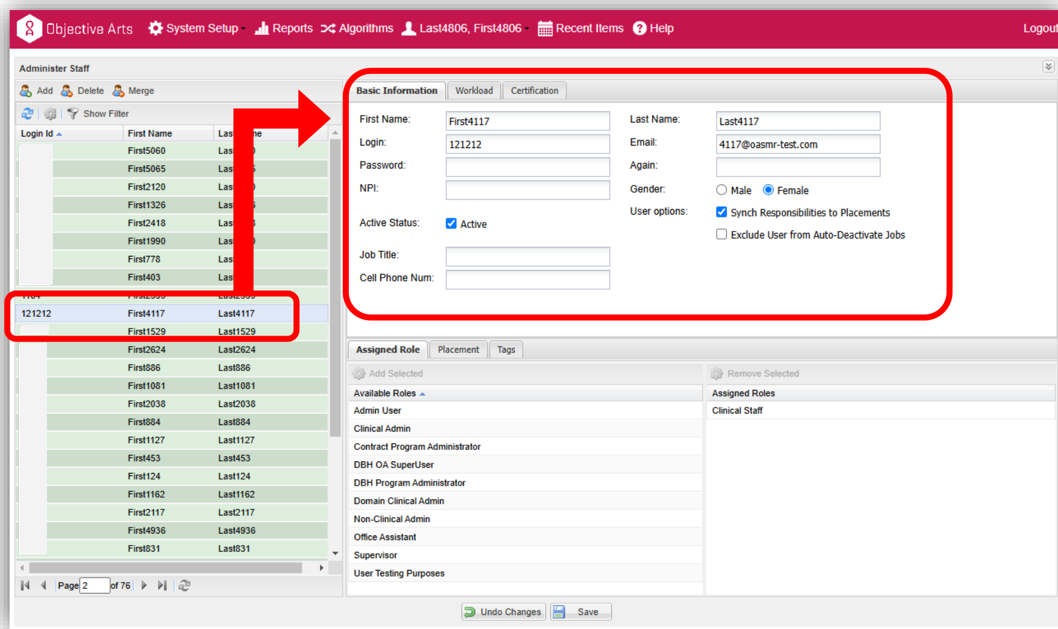
2. Under Placement Status, select **Show Placed** and **Show 'Not Placed'**.



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

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

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



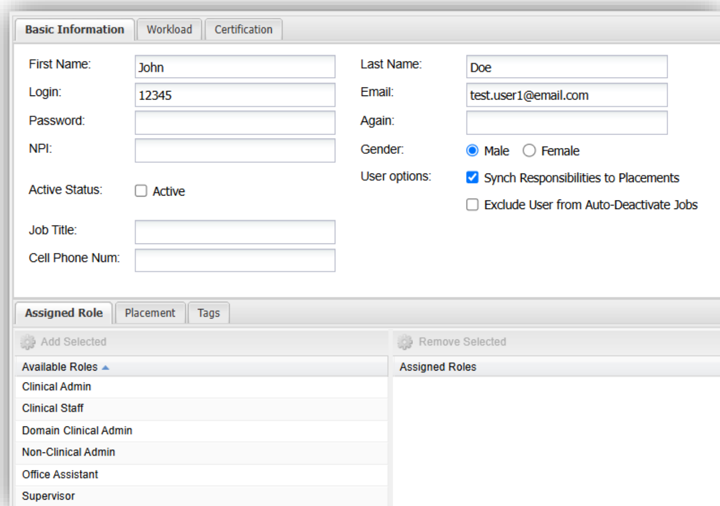
Double clicking on the Staff Name will open their profile.

Note: If you are unable to locate a staff account, and continue to receive an error message when attempting to create a new account, please contact the DBH-OA inbox for assistance.

Basic Staff Information

After creating a new staff account, additional information will be required to ensure that the account is active and up to date.

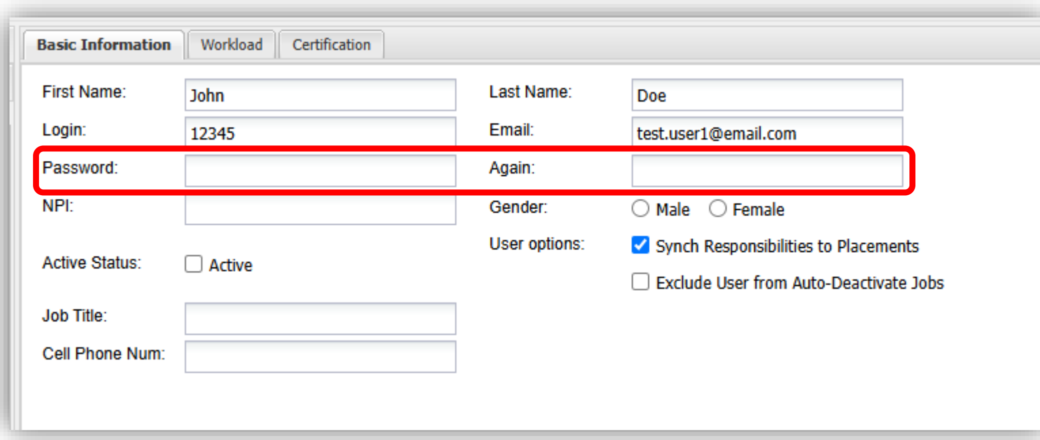
Note: The following sections will require you to have the staff members' profile selected and open in order to carry out any of the following tasks. As you're completing any of the following tasks, please **SAVE** after each major step to ensure no progress is lost.



1. Assign a **Password** and confirm the password in the **Again** box.

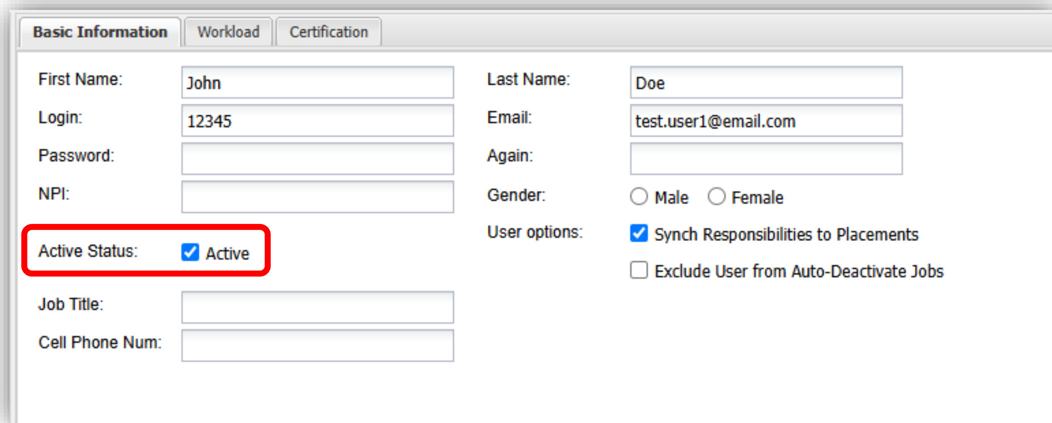
REMINDER: Passwords must be at least seven (7) characters in length and include at least one number and one capital letter.

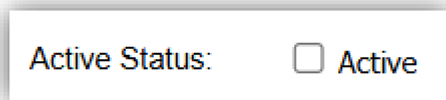
Example Temporary Password: Newpass1



Note: If **SAVE** is clicked after this step, password will be saved, but will not show on the profile. There is no need to re-enter the password, unless it needs to be changed again.

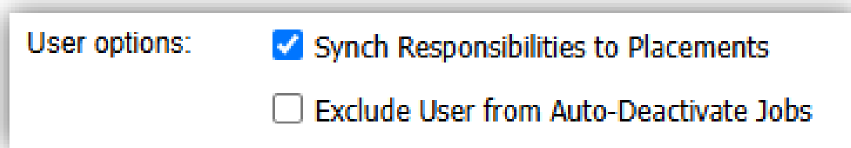
2. Activate the profile by checking the **Active** box.





If unchecked, the account is INACTIVE, and staff will not be able to log in. Please see Deactivating User Profiles on page 31 for more information.

3. Keep the **Synch Responsibilities to Placements** button active.



Note: Keep the **Exclude User from Auto-Deactivate Jobs** button unchecked at all times. This button was created specifically for backend processes and does not have any impact on the creation of staff profiles.

4. The remaining fields are **OPTIONAL.** Add information to these fields as needed:
- National Provider Identifier (NPI)
- Gender
- Job Title
- Cell Phone Number

5. Click **Save** to save all updates.

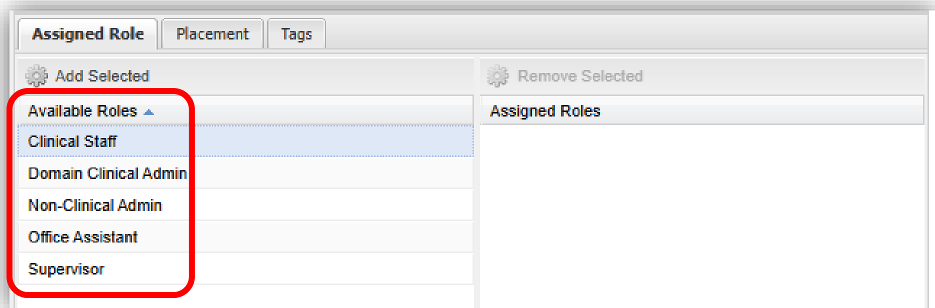
Assigning and Removing Roles

Assigned Roles determine what tasks users can complete in OA. You can only assign user roles that are equal to or less than your own. Ideally, only one role should be assigned. However, exceptions may apply.

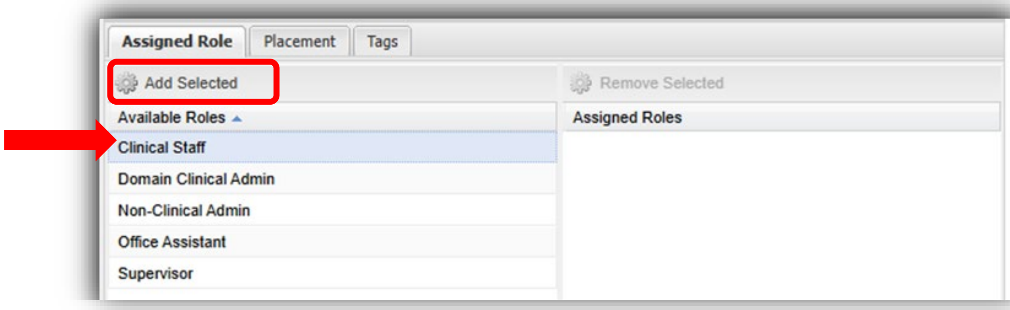
Refer to the *Objective Arts Roles Summary* in APPENDIX A for a detailed breakdown of each staff role.

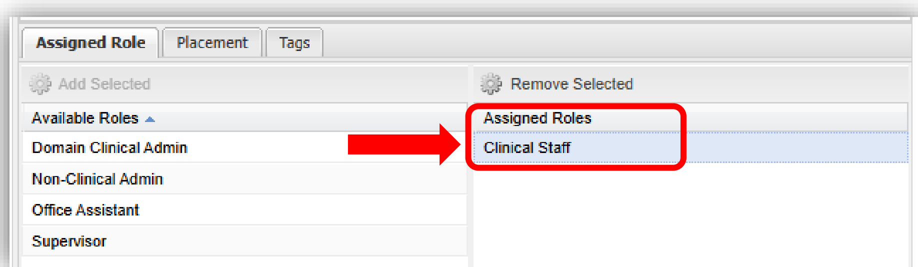
To Assign a Role

1. From the Assigned Role tab in the Available Roles pane, click on the appropriate role for the staff member to assign.

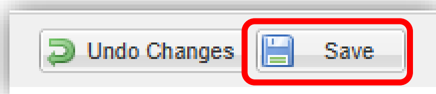


2. Click the **Add Selected** button. The role will appear in the Assigned Roles pane on the right. Clicking twice on the available role will also yield the same result.



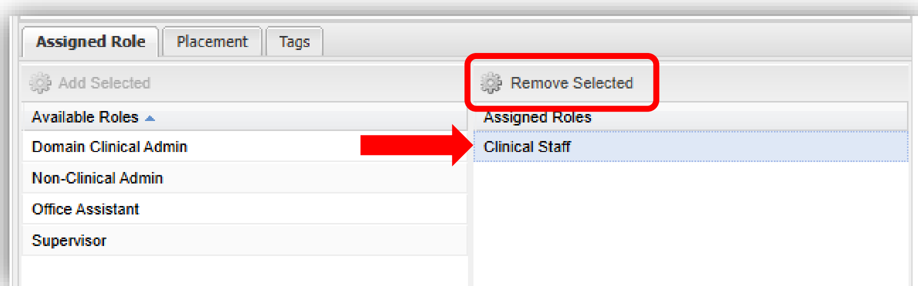


3. Click the **Save** button to apply your changes.

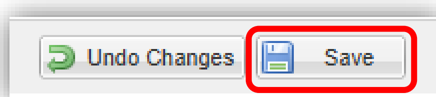


To Remove a Role

4. To remove a role, select the role in the Assigned Roles pane, and then click the **Remove Selected** button. Clicking twice on the assigned role will also yield the same result.

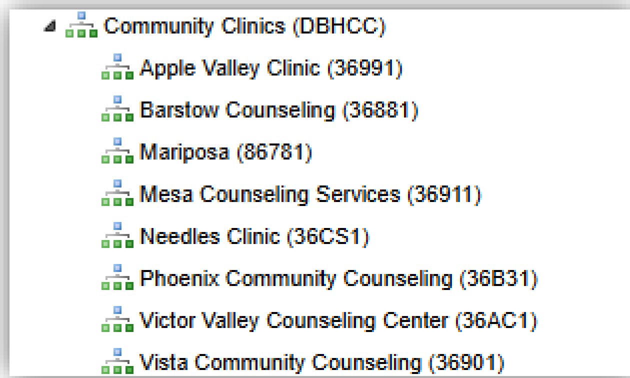


5. Click the **Save** button to apply your changes.



Adding and Removing Placements

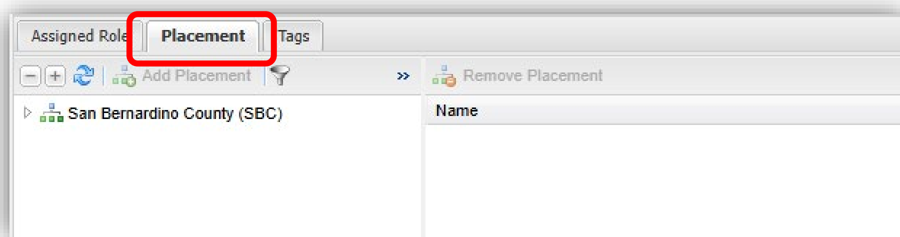
Placements for staff are the Reporting Unit(s) that they are associated with within their organization. Assigning a placement allows staff to view the clients that are receiving services within their organization under their program.



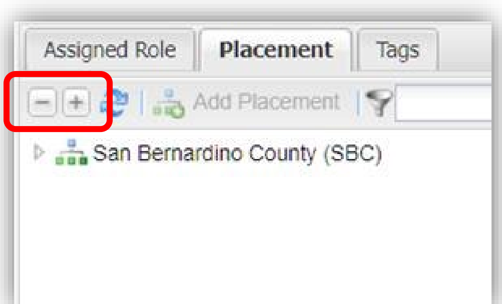
Each program has a unique Reporting Unit code that is used to link a client to the exact program they are receiving services from.

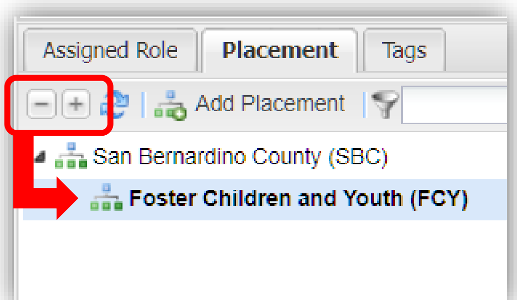
Adding a Placement

1. With a staff profile open, click on the **Placement** tab.



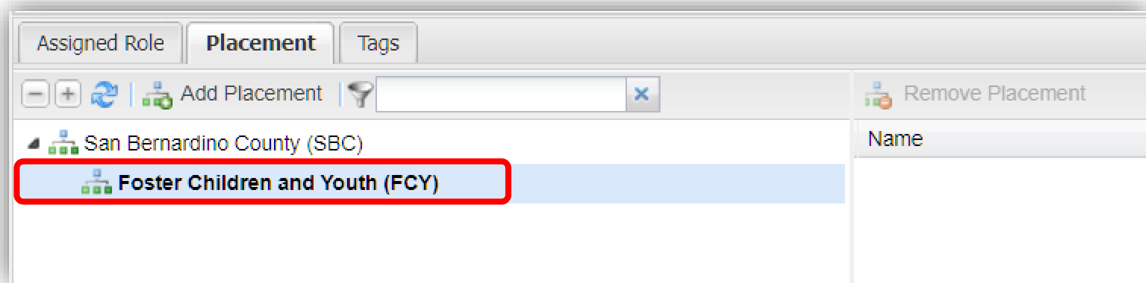
2. Click on the **+ icon** from the  buttons to expand the organization hierarchy.



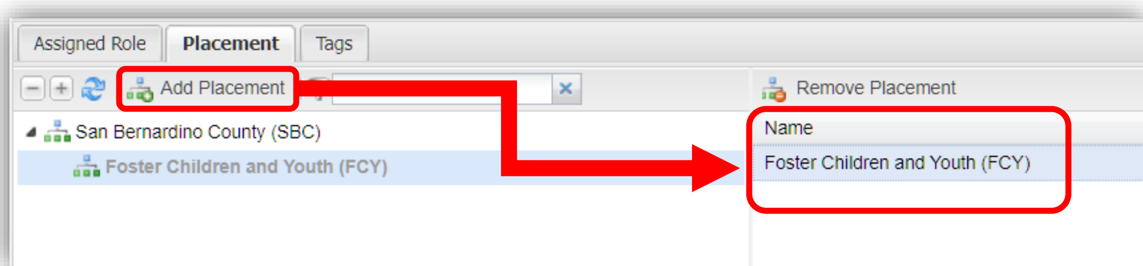


Note: You can also filter the organization hierarchy by typing into the search field located to the right of the **Add Placement** button.

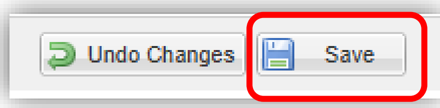
3. Select the RU(s) that the user is associated with.



4. Click the **Add Placement** button to add the selected RU. The program's name and RU will appear in the right pane once added. Dragging and dropping the highlighted RU into the pane on the right (labeled "Name") will yield the same results.

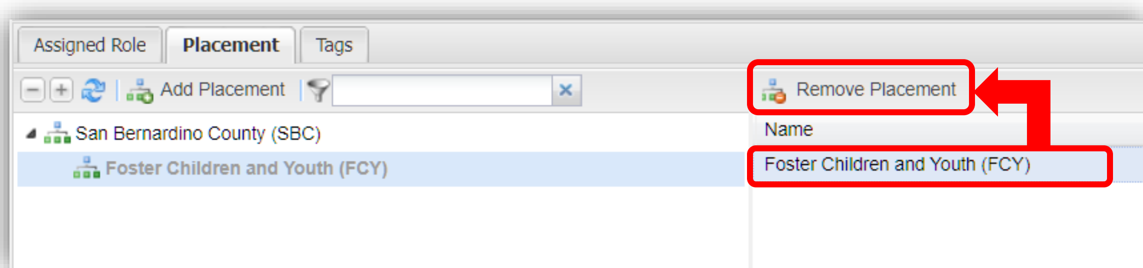


5. To save your changes, click the **Save** button at the bottom of the screen.

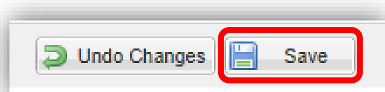


<u>To Remove a Placement</u>

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



7. Click the **Save** button to apply your changes.



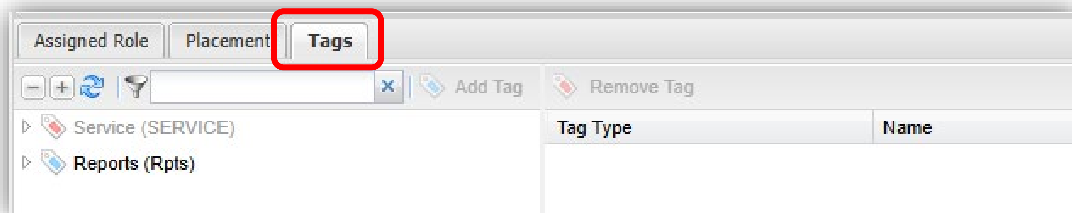
Adding and Removing Tags

Tags are related to RU, Clients, and Services. The primary purpose of tags is to allow for reporting categories that do not follow standard organizational unit boundaries as well as help define special populations (i.e., meds only, etc.).

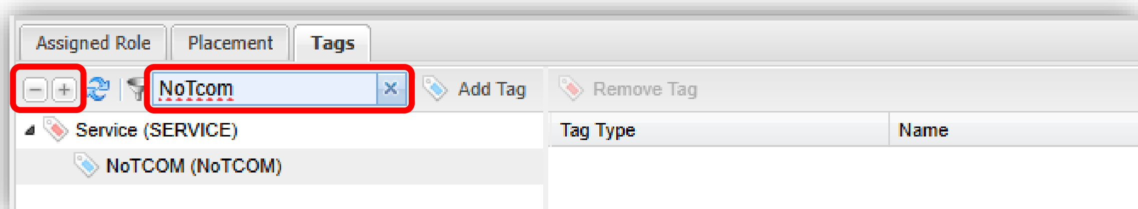
Please seek guidance from your program administrator for instructions on when to use unique tags for your staff.

<u>To Add a Tag</u>

1. With a staff profile open, click on the **Tags** tab.

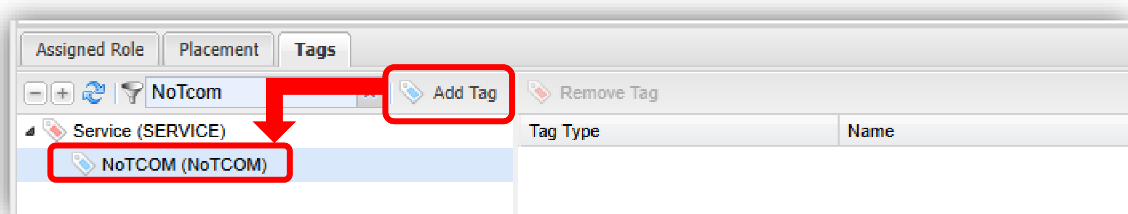


2. Click on the **+ icon** from the  buttons to expand the tags list hierarchy, or type in the name of the tag you are seeking (if known).



Note: You can also filter the available tags by typing into the search field located to the right of the **Add Tag** button.

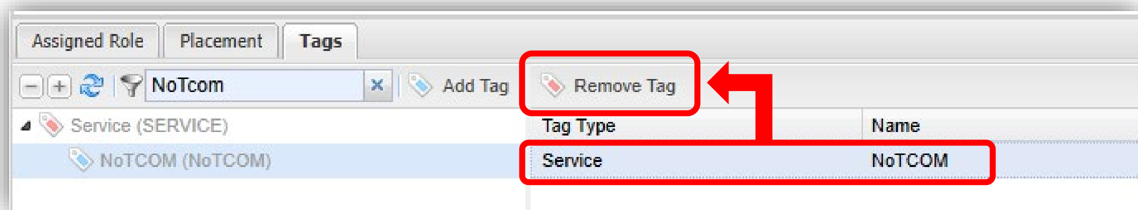
3. Select the Tag to be added and click on the **Add Tag** button. The tag will appear in the right pane once added. Clicking and dragging the selected tag to the right-hand pane (labeled “Tag Type / Name”) will yield the same result.



4. Click the **Save** button to apply your changes.

To Remove a Tag

5. Click on the **Tag** to be removed, then click on the **Remove Tag** button.

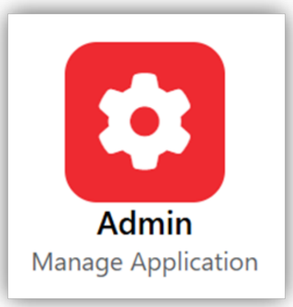


6. Click the **Save** button to apply your changes.

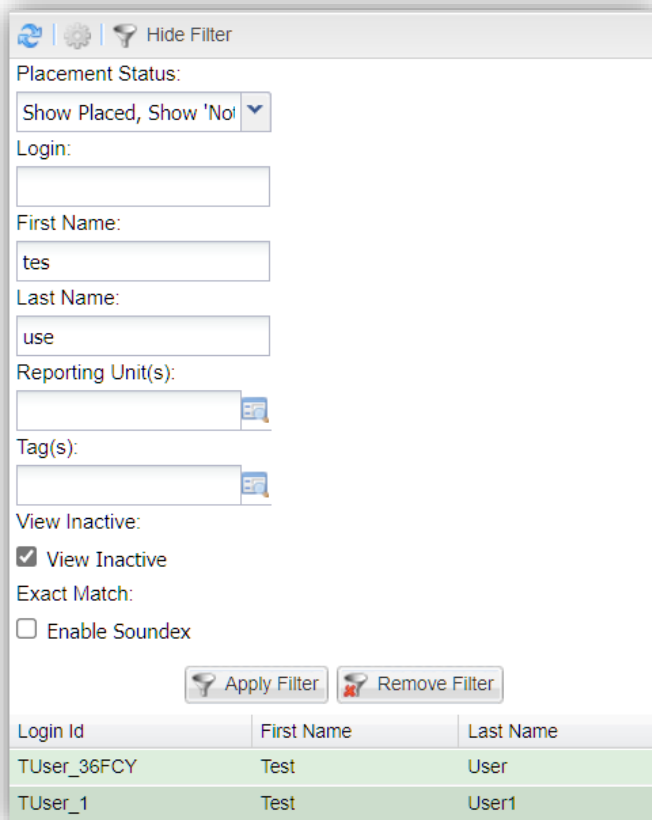
Editing User Profiles (Summary)

Editing a user profile will follow the same steps used to create a new staff account. When updating a staff profile:

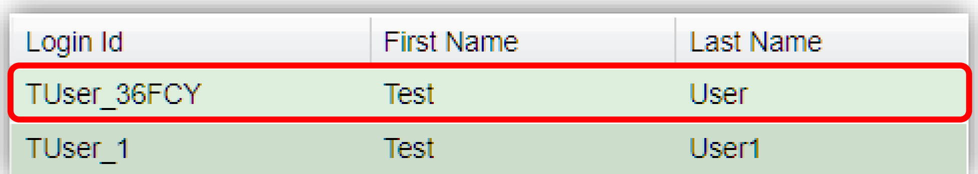
1. From the Home Screen, click the **Admin** box to access the **Administer Staff** screen.



2. Use the **Filter Menu** to drill down to the staff member’s profile that you wish to edit.

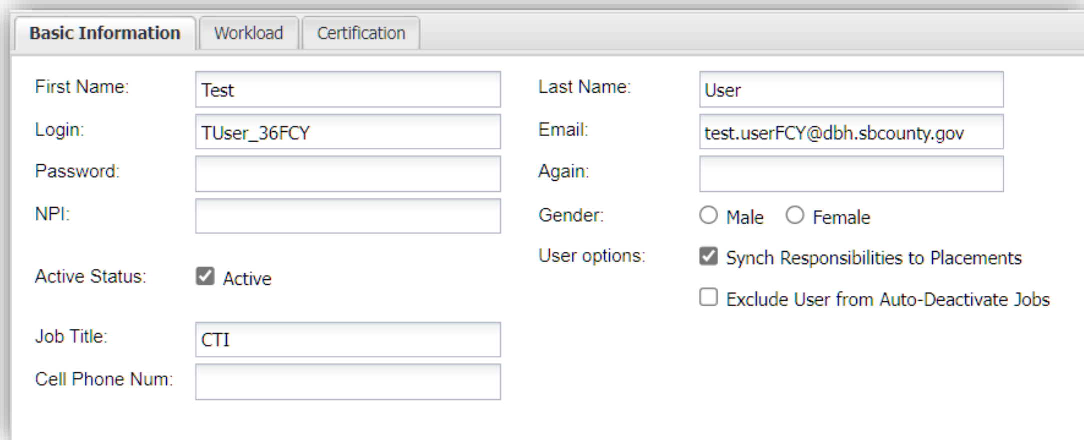


3. Double-click the name of the staff member to open the staff profile.



Login Id	First Name	Last Name
TUser_36FCY	Test	User
TUser_1	Test	User1

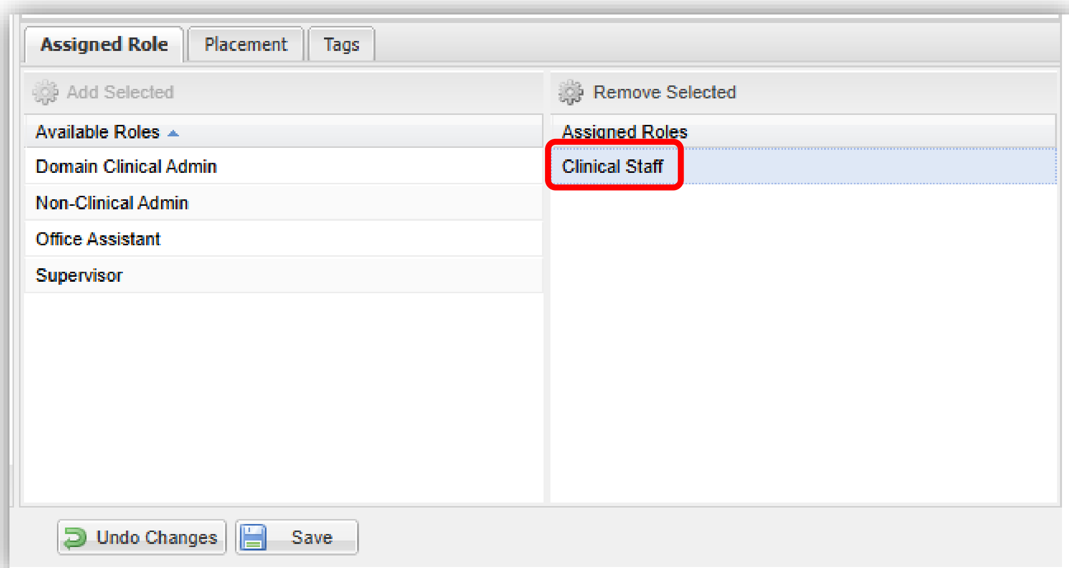
4. Review the **Basic Information** in the staff's profile and update as necessary.



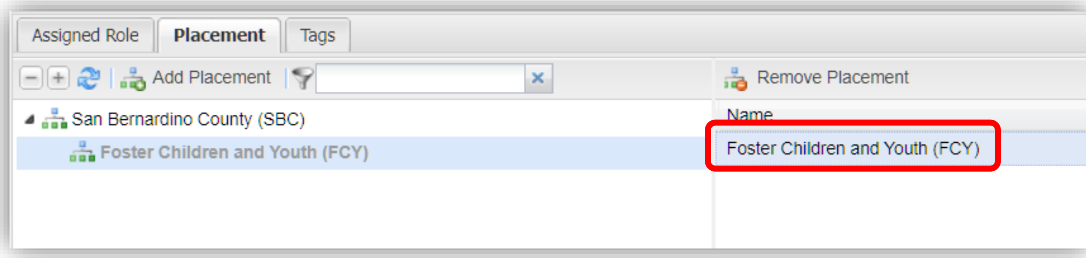
Common fields to update include:

- Email address
- Passwords (be sure to repeat in the Again box)
- Active Status
- Job Title

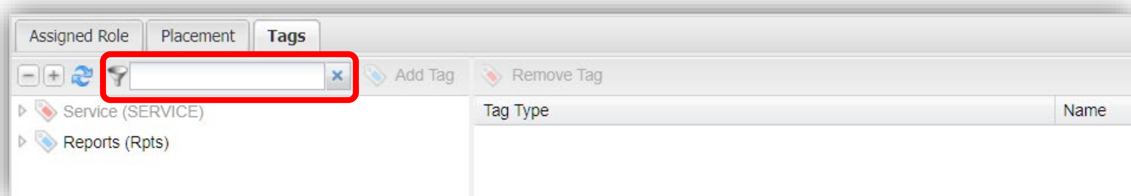
5. Review the **Assigned Roles** and update as necessary.



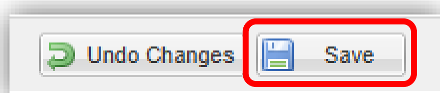
6. Select the **Placement** tab and update as necessary.



7. Select the **Tags** tab and update as necessary.

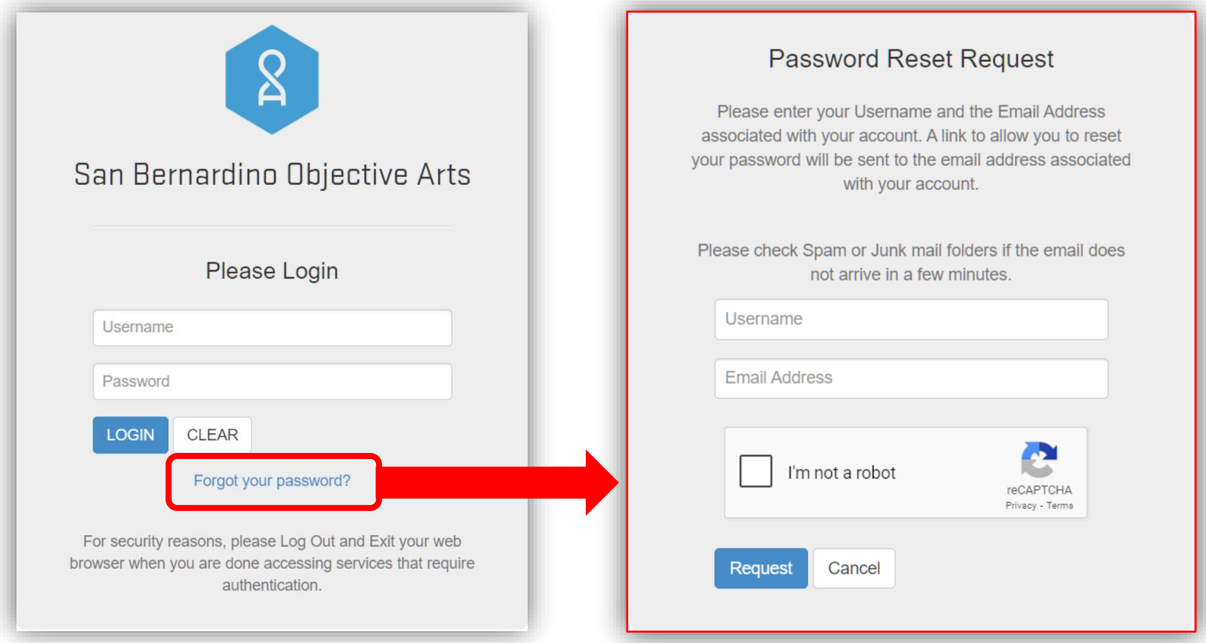


8. Click the **Save** button to apply your changes.



Resetting Passwords

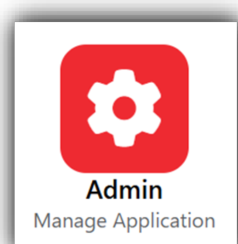
Staff may be able to reset their passwords on their own using the **"Forgot Your Password?"** link found in the login screen.



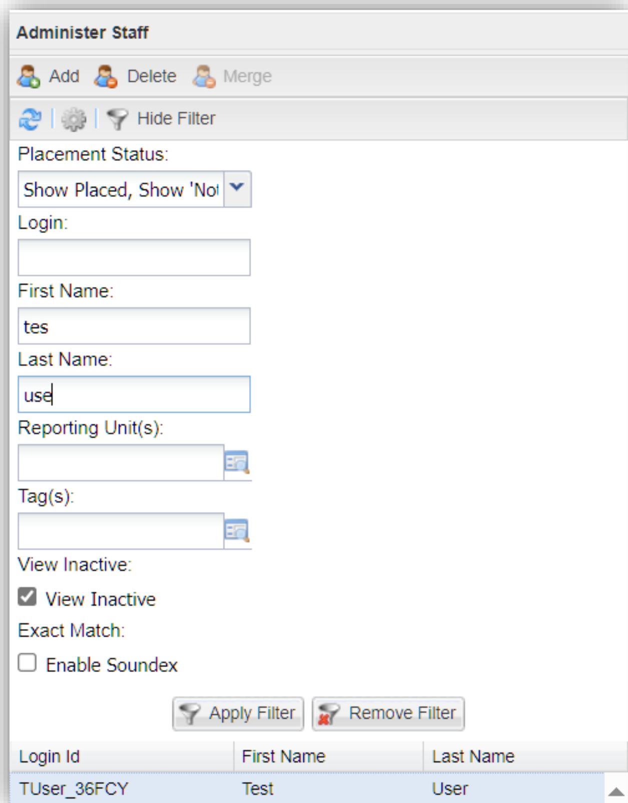
However, if staff forget their Username and/or no longer have access to the email address associated with their existing user profile, then as the SME, you can assist by updating their user profile information and providing a new temporary password. Review the following fields and update as necessary:

- Email address
- Password
- Assigned Role
- Placement(s)

1. Navigate to the **Administer Staff** page by clicking the **Admin** button from the **Home Screen**.



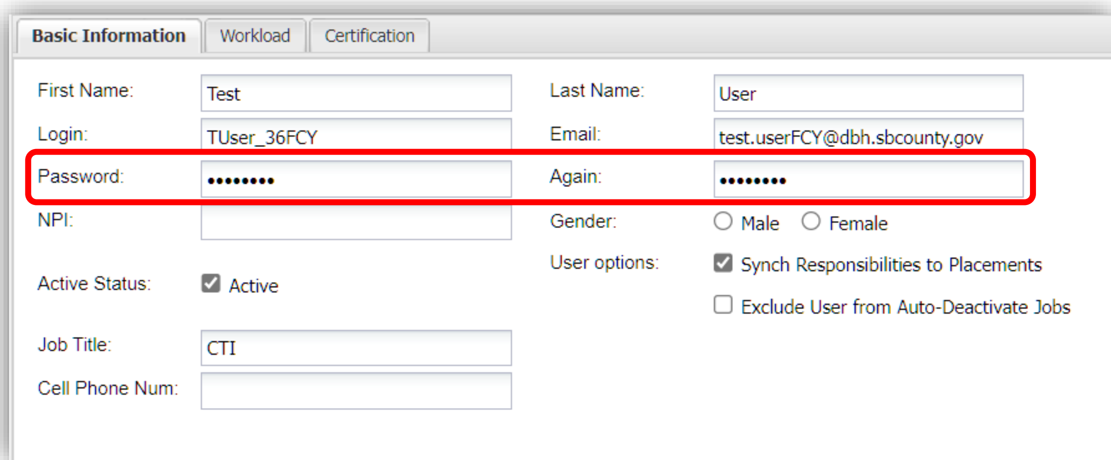
2. Filter the **Staff List** to find the user's profile.



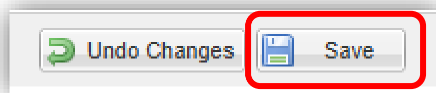
3. Assign a temporary **Password** and repeat the password in the **Again** box.

Note: Passwords must be at least seven (7) characters in length and include at least one number and one capital letter.

Example Temporary Password: Newpass1



4. Update any additional fields as necessary (e.g.: email address, roles, placement status, etc.)
5. Click the **Save** button to apply your changes.

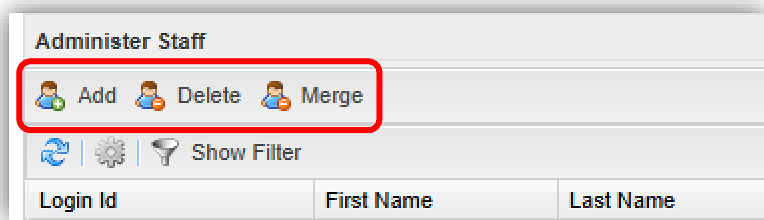


Deactivating User Profiles

Just like how accounts are activated by checking on the appropriate profile settings, when a staff member is no longer a part of your organization, these settings must be cleared out to deactivate the account. Deactivation steps include removing **Assigned Roles**, removing all **Placements**, and any applicable **Tags**.

Note: *** As an SME, you must deactivate user profiles in both TRAIN and LIVE sites IMMEDIATELY (no later than by the close of the next business day) upon the employee's termination. Failing to do so puts your agency at risk of exposing Protected Health Information/ Personally Identifiable Information (PHI/ PII) and is out of compliance with the Health Insurance Portability and Accountability Act (HIPAA) standards. ***

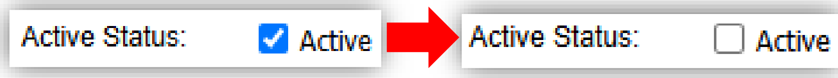
Although there is a **Add**, **Delete** and **Merge** Buttons for administering staff, functionality for the **Delete** button has been deactivated. Staff accounts are tied to both prior and current clients and their assessments, thus serving as a historical record. Therefore, rather than being deleted when staff leave, accounts are deactivated.



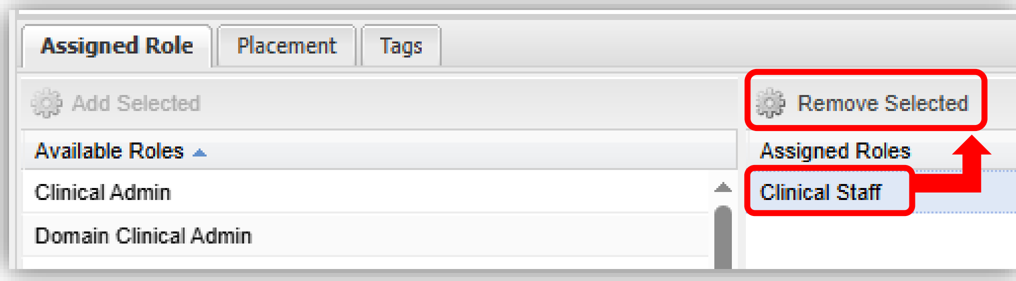
Error message received when attempting to "Delete" a Staff Account.

To Deactivate a Staff Account

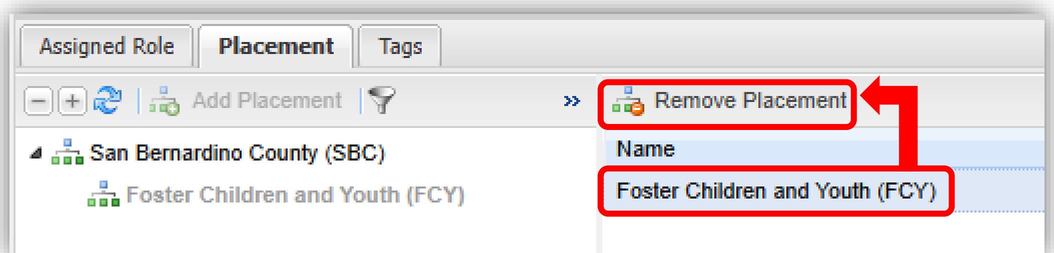
1. Filter the Staff List to find the individual profile.
2. Deactivate the user's profile by unchecking Active Box



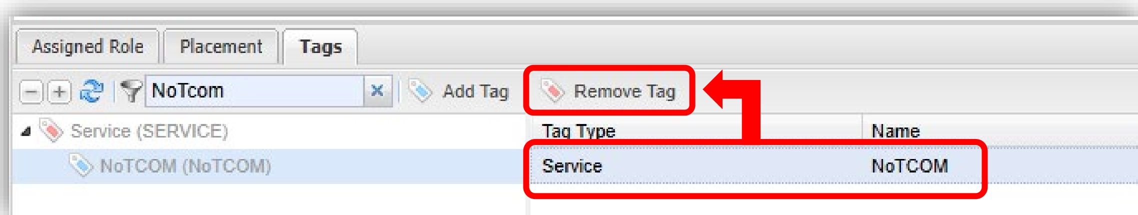
3. Go to the **Assigned Role** tab and click on their assigned role and click on **Remove Selected** (see *Assigning and Removing Roles* on page 20 for more information).



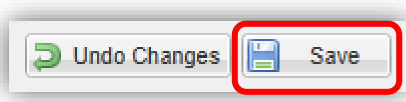
4. Go to the **Placement** tab and click on their placement(s) and click on **Remove Placement** (see *Adding and/or Removing Placements* on page 22 for more information).



5. Go to the Tags tab and click on their tag(s) and click on **Remove Tags** (see *Adding and Removing Tags* on page 24 for more information).



6. Click the **Save** button to apply your changes.



SAN BERNARDINO COUNTY | Behavioral Health

Post TCOM Registration for Clinical Staff

This form is used to verify system competence and create profiles for new clinical staff who do not attend Objective Arts training through WET. The form is only to be completed by clinical staff who will not be attending OA training through WET.

Note: Do **not** create a training profile if the staff member is registered for Objective Arts Basic Training in Relias.

SAN BERNARDINO COUNTY | Behavioral Health

Objective Arts Clinical Staff TCOM Training and Profile Creation

Objective Arts is the web-based data system used by San Bernardino County Department of Behavioral Health (DBH) to provide structure to the utilization of Transformational Collaborative Outcomes Management (TCOM) tools (*e.g., CANS, PSC-35, & ANSA*). This form is used to verify system competence and create profiles for new clinical staff not attending Objective Arts training through DBH's Workforce Education and Training (WET).

Form Completion Instructions

Note for Clinical Staff:

- Please provide this form to your agency's OA Subject Matter Expert (SME) or your supervisor.
- If your agency does not have an OA SME, please have your Program Manager, Supervisor, or designee contact DBH-OA@dbh.sbcounty.gov.

Note for SME's or Supervisors:

- This form is only to be completed for clinical staff who will *not* be attending OA training through WET.
- *Do not* create a training profile if the staff member is registered for Objective Arts Basic Training in Relias.

SME Information and Tasks

Agency	
SME Name	
Email	

1. Create the clinical staff member's profile in the Training website: (https://training-sbcans.oasmr.com)
2. Provide the clinical staff with the following information: assigned login and temporary password.
3. Instruct the new clinical staff to complete the training exercise. (For instructions for training exercise, please see the SME Desk Reference, Post TCOM Training and Profile Creation for Clinical Staff section).
4. Instruct the clinical staff to complete the **Clinician Information** section below. Verify completion of this form. Then within one week of clinical staff attending the DBH TCOM Training, email a copy of this completed form to DBH-OA@dbh.sbcounty.gov with the Subject Line: *Objective Arts Clinical Staff Post TCOM Training and Profile Creation–{clinical staff name}*.

Clinician Information

The following information must be included in order to process form.

First Name		**Staff ID Number**	
Last Name		**Objective Arts Role**	
Email		**Assessment ID #**	
Phone #		**Assessment Date**	
Job Title			

Once DBH has approved the assessment reported above, the SME will receive an email from DBH authorizing the creation of the clinical staff's profile in the Production Website.

Note: *Copies of all OA Training Manuals can be downloaded from the TCOM webpage located at https://wp.sbcounty.gov/dbh/tcom.*

Objective Arts Clinical Staff Post TCOM Training and Profile Creation Form

1. Complete the **SME Information and Tasks** section of the form. If you need a copy of this document, please contact DBH-OA@dbh.sbcounty.gov.

2. Create the clinical staff member's profile in the **TRAIN** website. (Refer to the *Creating a New Staff Account* section on page 14 for step-by-step instructions).

3. Provide the following information for the clinical staff in training.
   a. Login ID (username).
   b. Password (temporary).
   c. A link to the Objective Arts **TRAIN** website.
4. Assign the following **Clinical Staff Task**:

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

5. Provide guidance and clarification as requested by the clinical staff. Have the clinical staff **Submit** the assessment.

6. Complete all fields of the **Clinician Information** section of the form.

Clinician Information:

First Name:________________________	Last Name:________________________
Email:________________________	Phone: ________________________
Job Title:________________________	
Objective Arts Role: Clinical Staff	Staff ID Number:________________
Assessment ID number:______________ Must be included to process form.	**Assessment Date:**________________

Complete all fields.

7. Scan and email the OA Registration for Clinical Staff form to the DBH-OA@dbh.sbcounty.gov inbox with the following subject line:

> **Objective Arts Clinical Staff Post TCOM Training and Profile Creation – {*clinical staff name*}**

8. Wait for DBH to review the submitted assessment. Once approved, DBH will reply authorizing the creation of the clinical staff's profile in the Production (**LIVE**) website. *Please allow up to five (5) business days for processing.*

9. Create a staff profile for the clinical staff in the Objective Arts Production (**LIVE**) website. Once created, provide the clinical staff with their login username and password to sign-in.

MONITORING ORGANIZATIONAL ELEMENTS

As the OA SME for your organization, you have access to a variety of tools to aid you in responding to staffing changes, addressing missing client data, and assigning staff profile roles based on services provided.

Exporting Staff Data to .csv File

User Exporting is the process of extracting data about your organization's active or inactive staff in OA on an intermittent timeframe. SMEs can review active and inactive Staff on a weekly or monthly basis.

Since staffing changes may occur within your program or agency, this is a vital tool that can assist in determining the status of an account in both the **TRAIN** and **LIVE** sites for a staff member in a timely period. This helps protect client information and assists in continuing a smooth operation for your program/organization.

Active Vs Inactive Users

Active User	• Active User accounts are accounts in OA which have been active or had login activity within the last 180 days. • These accounts should be composed of users that complete some sort of function in the site (completing assessments, admin duties, etc.) for their program/organization.
Inactive User	• Inactive User accounts are accounts that have not had activity in OA in over 180 days. These accounts are deactivated automatically. • These users should be further reviewed to see if any action is needed. • Inactive User accounts cannot be automatically reactivated by staff and need the assistance of an SME to reactivate, if needed. • These accounts still have a User Role or a RU Placement assigned to the account. • Inactive users accounts may also be duplicate staff accounts. • These accounts should reflect staff that are no longer with the organization.

Please note: If a staff profile has been deactivated properly (where both the prior placement(s) and role(s) have been removed) they will not appear on the inactive list.

Users that are no longer with your program/organization should have accounts that are fully deactivated. The User Export file will assist in identifying these accounts that need attention. These accounts should, *at a minimum*, be deactivated by the close of the following business day, upon employee termination. To ensure complete compliance, the User Exporting file will identify the accounts that are still active and need to be deactivated, or identify deactivated accounts that need follow up attention to fully deactivate.

Responses to take in accordance with the User Exporting File information:

If a user account is inactive, but needs to be active:
The SME can reset and reactivate the account and send the user a message to have them login with the updated credentials. (Please see *Editing User Profiles (Summary)* on page 25 for instructions on how to complete this).

If a user account is still active, but has left your organization:
The user account needs to be fully deactivated immediately in both LIVE and TRAIN. (Please see *Deactivating User Profiles* on page 31 on instructions on how to complete this).

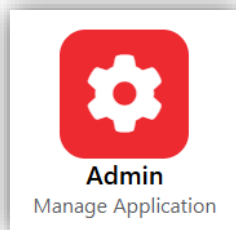
If a user account is inactive and has left your organization:
The user account is partially deactivated, meaning it still contains a placement or role. This account needs to be reviewed, and additional actions need to be taken to fully deactivate the account. (Please see *Deactivating User Profiles* on page 31 on instructions on how to complete this). Fully deactivating the user account allows the account to be located and reactivated under the appropriate organizational placements if staff has moved to another program/organization. Accounts that still have a placement assigned, despite being inactive, are restricted to the RU placement, and do not allow the account to be visible to others outside that RU placement, nor allow additional accounts to be created with the same Staff number or Login ID.

Additional uses for the User Export File:

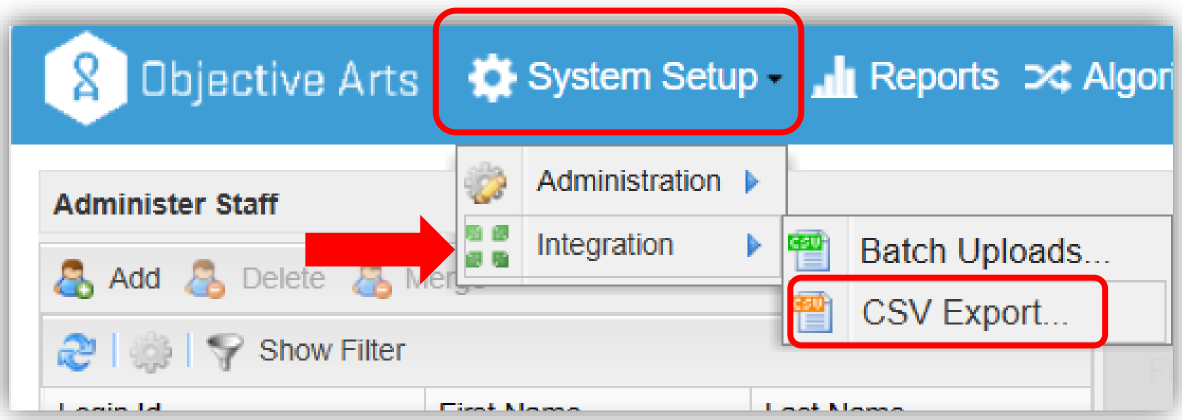
- ✓ Confirms that an accurate email address is listed in the account
  - Ensures coordination with Schoox for the ability to import certification(s)
  - Permits users to request a Reset Password email when forgotten on login screen
- ✓ Review of RU Placements
  - Ensures that the staff have the correct RU placements for their organization
- ✓ Review that an appropriate User Role is assigned
  - A user should only have one user role assigned (special circumstances exist, but this should be discussed with the DBH OA Team beforehand). (Please see the *Objective Arts Roles Summary* document on page 60 as a reference).
- ✓ Confirm User ID's are set up correctly
  - Allows you to confirm that user account logins are in the proper format to ensure that information matches the staff master.
    - There should be no leading zeros in the login IDs.
    - Staff IDs allow minimizing the amount of login usernames a staff needs to keep track of.

How to Export Staff Data to .csv File

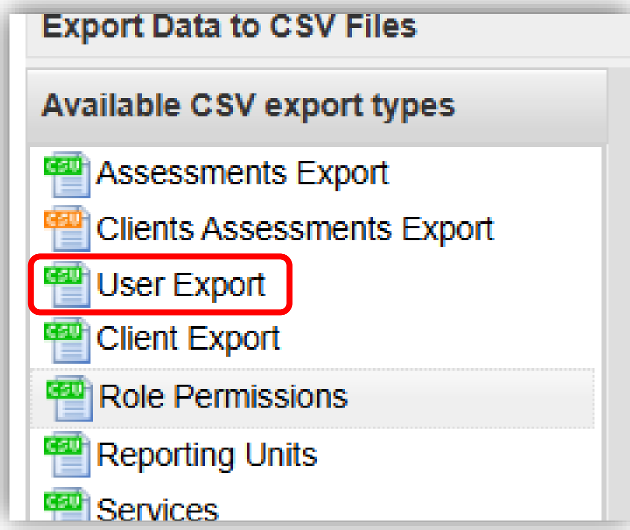
1. From the Home Screen, click the **Admin** box to access the **Administer Staff** screen.



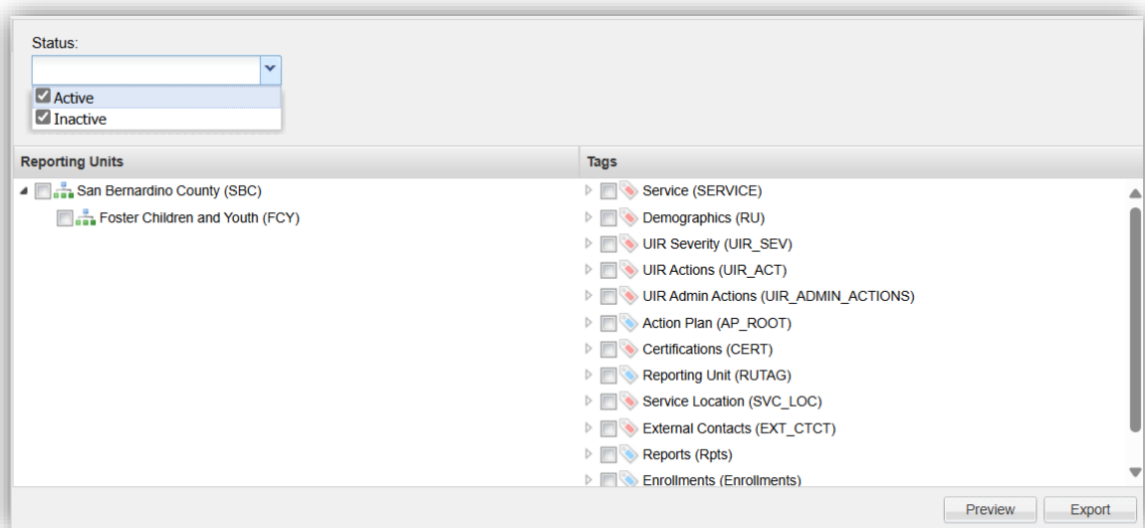
2. On the data toolbar, click on **System Setup**, hover over **Integration**, and then select **CSV Export….**



3. Select **User Export** from the list of available CSV export types.



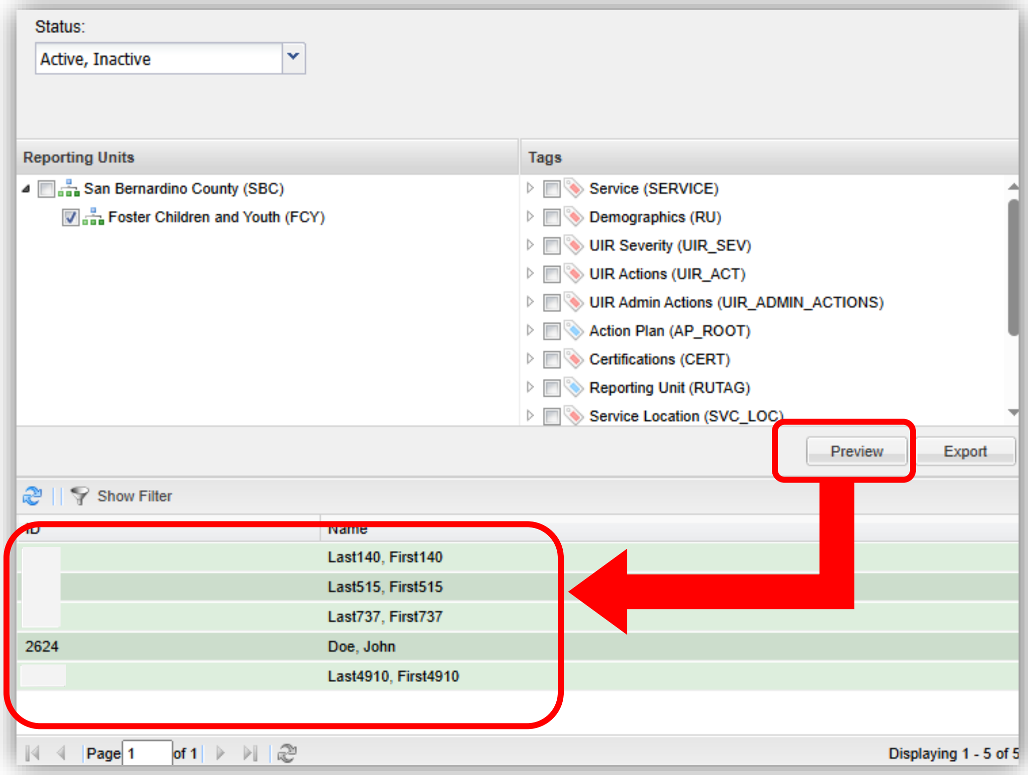
4. A window with Status, Reporting Units, and Tags will open.



These are the recommended settings:

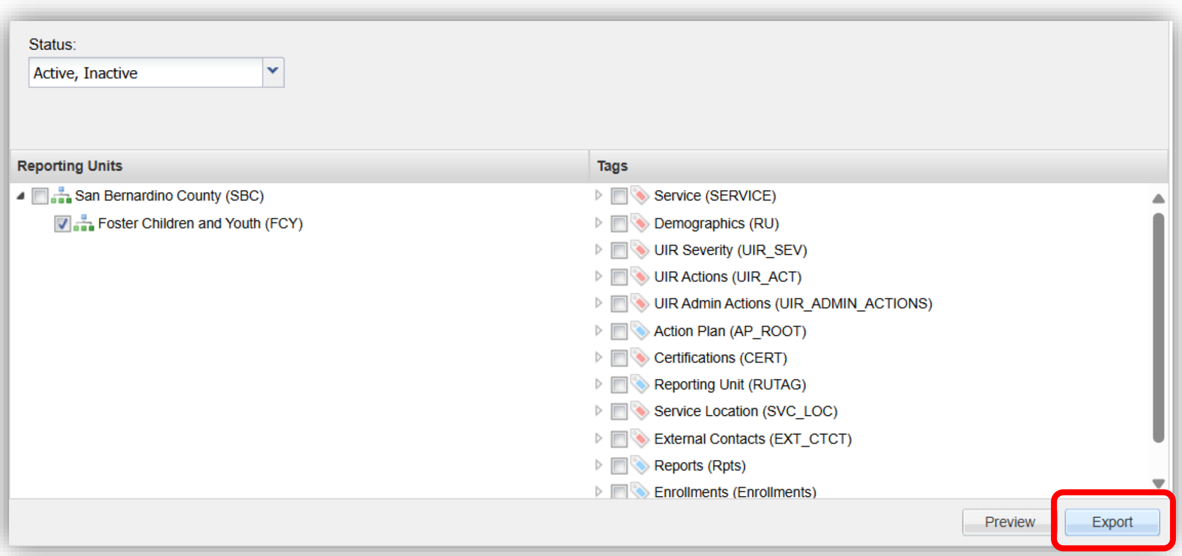
Parameter	Description	Recommended Settings
Status	Select the OA staff user profile status type(s) to include in the export.	If both Active and Inactive status remain unchecked, then export will include both statuses. Select as applicable.
Reporting Unit	List of Reporting Unit(s) available to you.	Select your Reporting Unit(s) for the report. This field is **required** to be selected.
Tags	List of Tags that may be assigned to staff.	Select any tags, if applicable. Otherwise, leave blank.

5. **(Optional Step)**: Click the **Preview** button to see a full list of the users that will be included in the report with the above specified parameters once it is downloaded.



Preview Example.

6. Click on **Export** to download.



Note: Depending on the browser you are utilizing and your computer settings, you may be prompted to save the file somewhere specific, or it will download automatically to a specified folder. Please locate the file accordingly.

The file will save as an Excel Spreadsheet and will populate with information of your agency's staff that have accounts in the OA system.

This will contain the following fields:

• User Internal ID • First Name • Last Name • Middle Name	• Active (Status) • Email • Login • National Provider Identifier	• Export Identifier • Placements • Roles

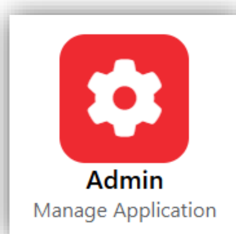
	A	B	C	D	E	F	G	H	I	J	K
1	User Interi	First Nam	Last Name	Middle Na	Active	Email	Login	National F	Export Ide	Placemen	Roles
2	140	First140	Last140		Inactive	140@oasr				Foster Chi	AU
3	515	First515	Last515		Inactive	515@oasr				Foster Chi	AU
4	737	First737	Last737		Inactive	737@oasr				Foster Chi	AU
5	2624	John	Doe		Active	test.user1	12345			Foster Chi	DCA, CA
6	4910	First4910	Last4910		Active	4910@oas	TUser_1			Foster Chi	DCA, CA

Excel Spreadsheet Example.

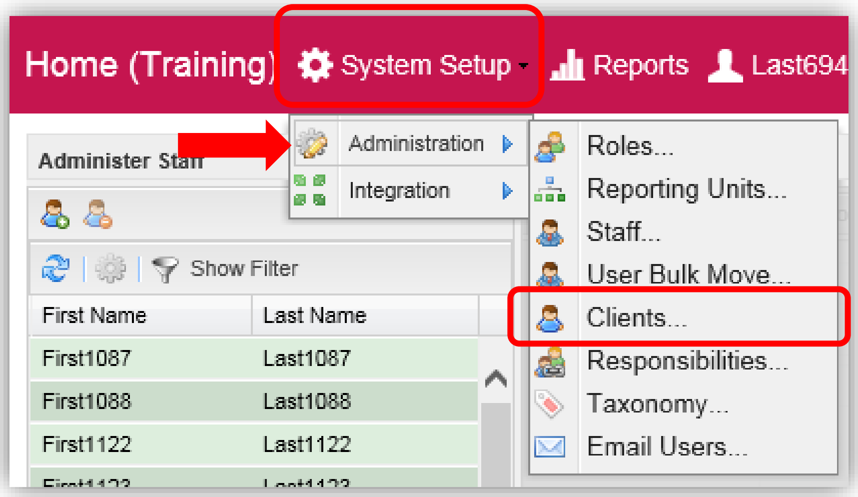
Temporarily Opening a Client

When a client has a closed placement in a reporting unit, new assessments cannot be created for them. This poses a problem when assessments need to be entered for those placements (e.g., update assessment, unplanned discharge assessment, etc.). With an administrative role, closed client placement can be temporarily opened via the **Temp Open** button on the client's administrative page. This reopens the selected client's placement for three (3) days, allowing additional data entry to be completed. The placement can be reopened as many times as necessary.

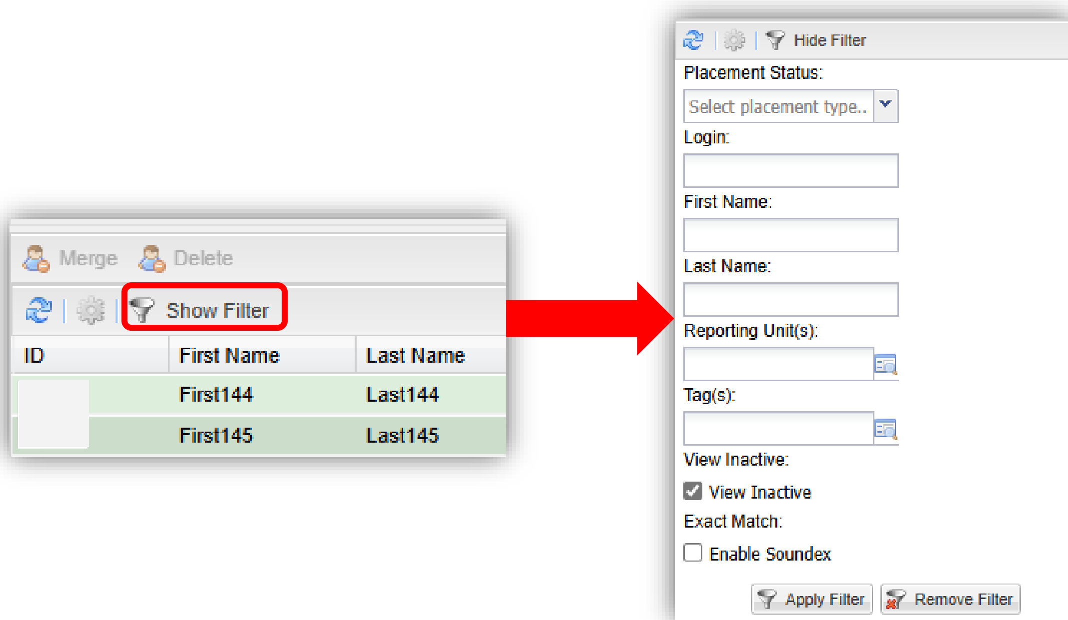
1. From the Home Screen, click the **Admin** box to access the **Administer Staff** screen.



2. On the data toolbar, click on **System Setup**, hover over **Administration**, and then select **Clients….** This will open the **Administer Client** page.

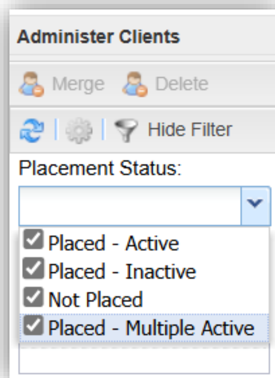


3. Click the **Show Filter** button to open the **Filter Menu**.



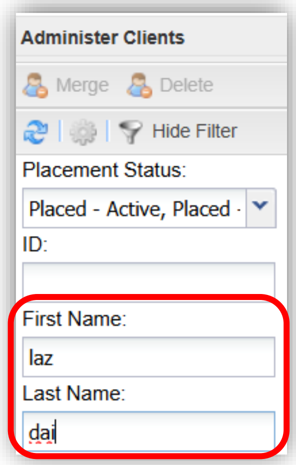
Filter Menu for Client List

4. Under Placement Status, check **Placed – Active**, **Placed – Inactive**, **Not Placed**, and **Placed – Multiple Active**.



5. Enter the client's **ID number**. Alternatively, you may enter or include the client's **name**.

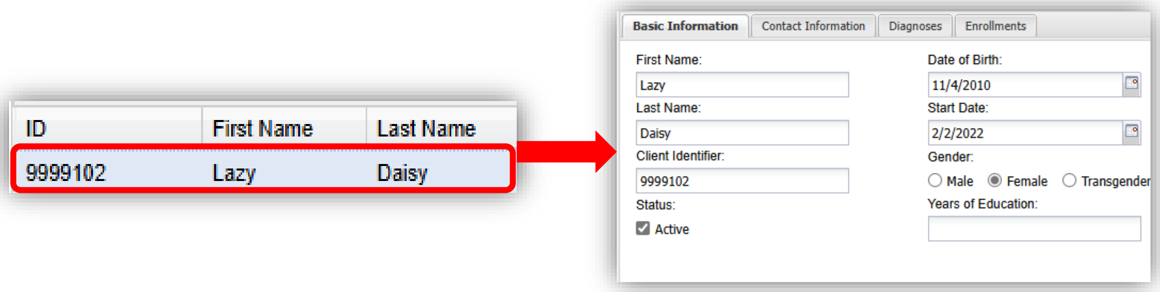
Note: It is NOT necessary to enter information in all the search boxes. Nor do you need to enter a complete name or number. You may enter as much or as little information as necessary.



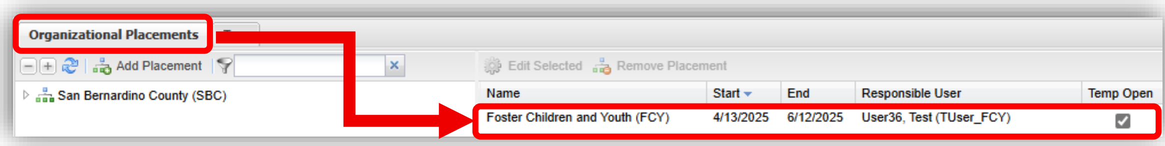
Searching for client "Lazy Daisy" by entering partial information.

6. Click the **Apply Filter** button to refresh the staff list to show results based on the filter settings you applied.

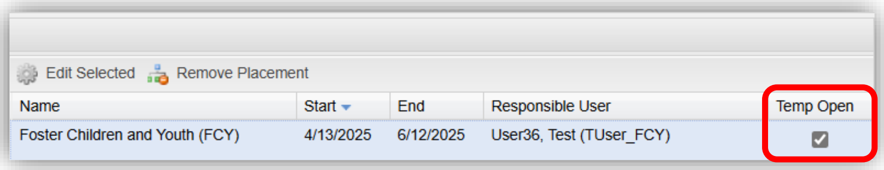
7. Double click anywhere within the row containing the client's information. Doing so will open their profile in the panel to the right.



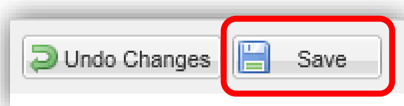
8. Click the **Organizational Placements** tab, and then select the **placement** you wish to re-open.



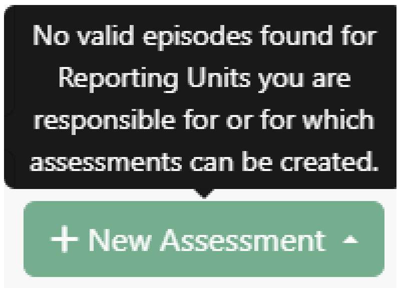
9. Click the **Temp Open** checkbox in the row where your RU is listed.



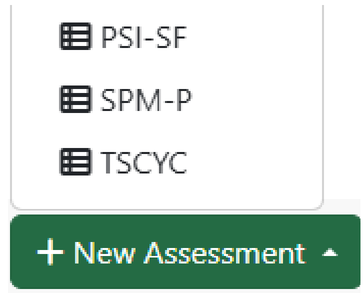
10. Click the **Save** button at the bottom of the page to apply your changes. If you do not save, the client will remain closed, and you will have to repeat this process.



11. Access the **Client Page** via the **Data Portal**. Once in the client's page, the **New Assessment** button will become available again for the client. Create a new assessment from the **Client Page**.



Before Temp Open



After Temp Open

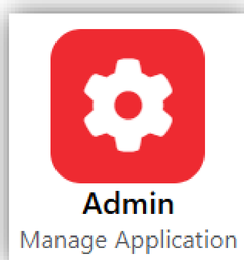
12. Once the assessments have been entered you may uncheck the **Temp Open** button or wait three (3) days for the placement to close again automatically.

Assigning the NoTCOM Service Tag

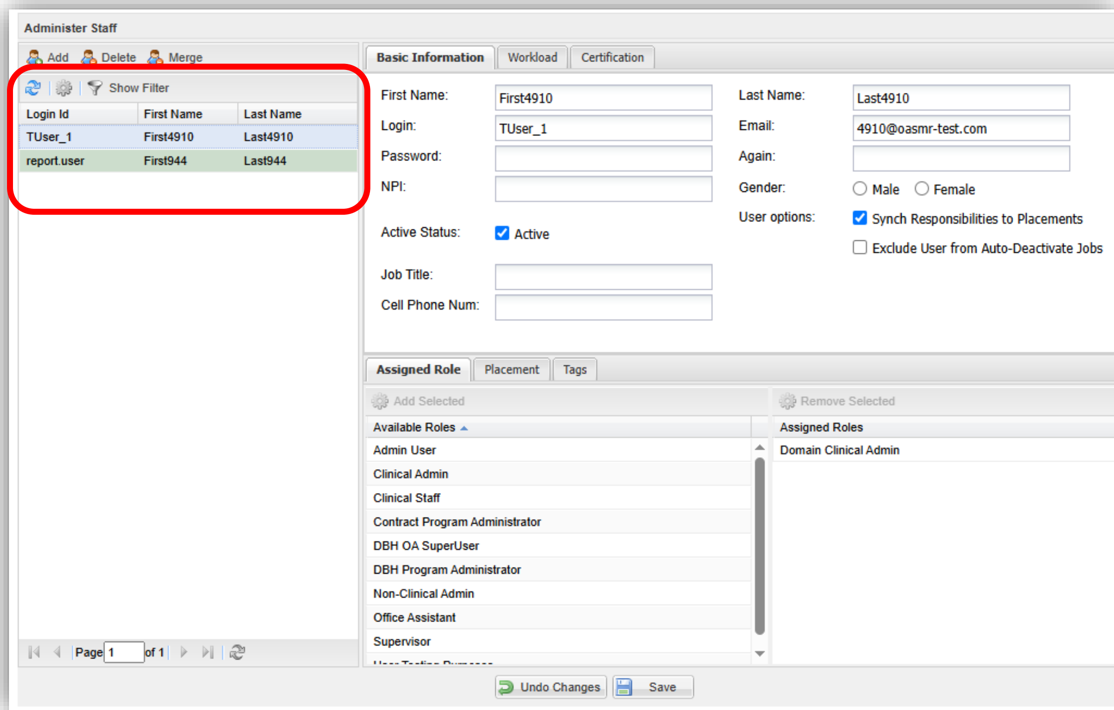
The **NoTCOM** service tag is designed for clinical staff who are not expected to complete any TCOM assessments for their clients. It is a way to override TCOM assessment requirements without affecting program-level reports like the Tickler with Episodes.

Who this applies to: Medical practitioners such medical doctors and nurses who are not required to complete TCOM assessments for their clients.

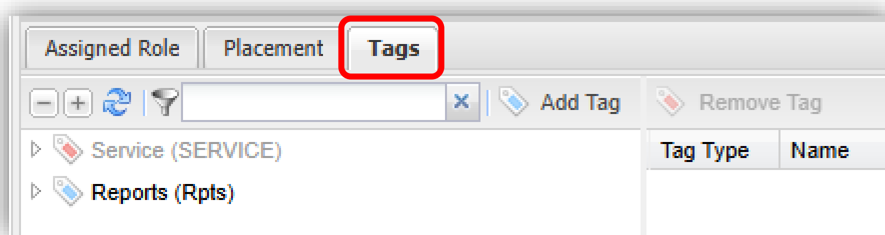
1. From the **Home Screen**, select the **Admin** icon to open the Admin Page.



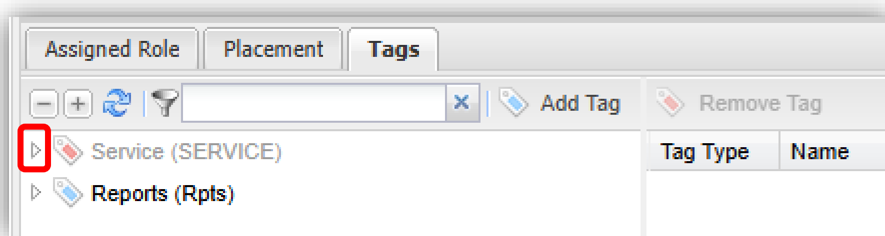
2. Search for your desired staff using the **Filter Menu**. Open their profile by double-clicking anywhere inside the row.



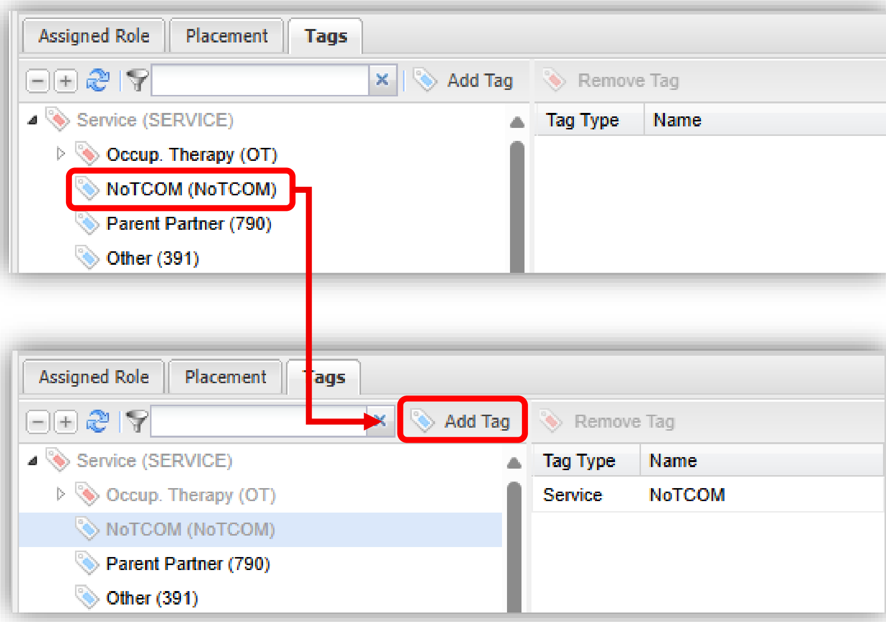
3. Open the **Tags** tab found towards the center of the page.



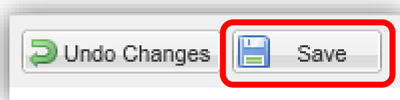
4. Select the arrow in front of **Service (SERVICE)** to expand the tag category.



5. Select the **NoTCOM (NoTCOM)** service tag and click the **Add Tag** button.



6. Click the **Save** button to apply the change.



TROUBLESHOOTING HELP

As a web-based application, you may experience some issues while utilizing the Objective Arts platform. The range of resolving these issues may involve simply refreshing the browser or may involve going into the EHR to correct data.

Since the developers are actively maintaining the site, the issues that may be experienced will primarily be browser involved, and these can be resolved with in-browser fixes. Common ways to address any issues being experienced with the browser are the following:

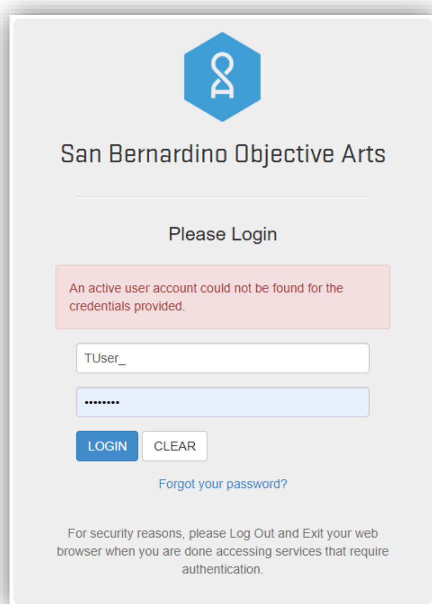
- Clear your main browser's cache.
  - *Please complete a web search for instructions on how to clear your cache based on the browser that you are using.*
- Try a different browser if the issue persists.
  - *Edge, Chrome, Mozilla, etc. – please only use the browsers permitted by your organization.*

If issues persist, and they are not addressed below, please contact the [DBH-OA inbox] for assistance.

Staff Login

<u>Issue #1</u>:
Staff received an error message when attempting to log in:

"An active user account could not be found for the credentials provided."



Example of possible login error message.

<u>Solution to Issue #1:</u>
Please ensure that the staff use the correct login information when attempting to log in:

Username = Login (*not your email*)
Password = Password assigned

Please also ensure that the account is active (via the Active Status checkbox ☑ in their staff account). Otherwise, the account is still deactivated, and the staff will not be able to log in.

If there are any issues even after these items are addressed, please contact the DBH-OA inbox for assistance.

TCOM Assessments

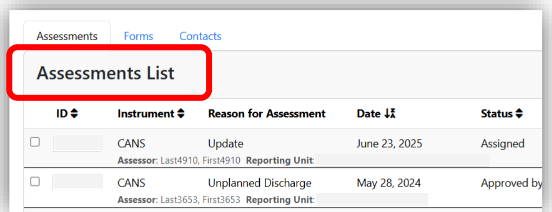
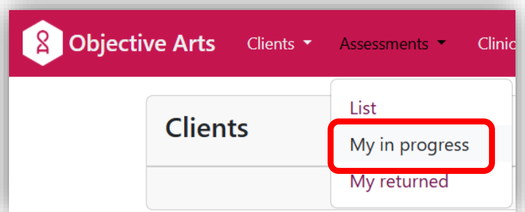
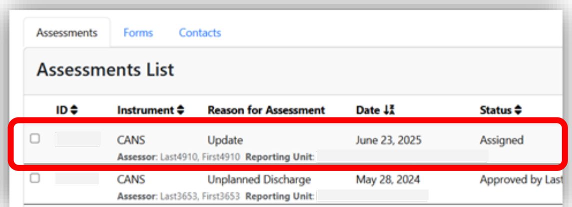
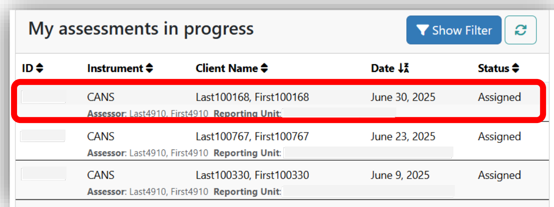
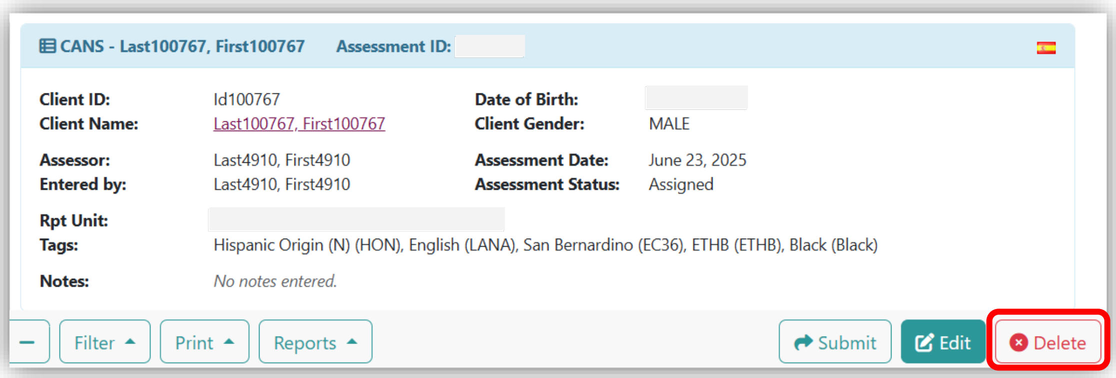
<u>Issue #1</u>:
Assessments for clients appear as **Assigned** status and are blank. Is there a way to delete these assessments?

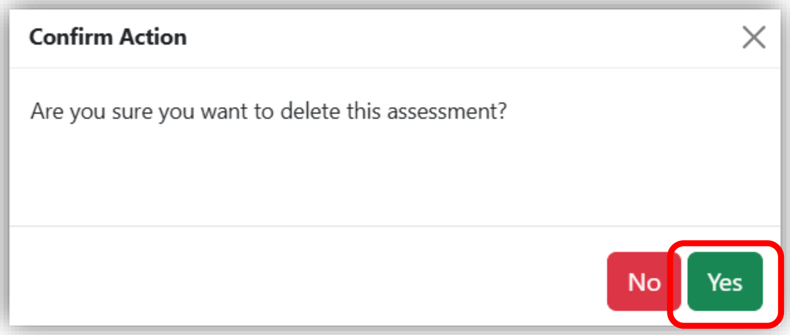
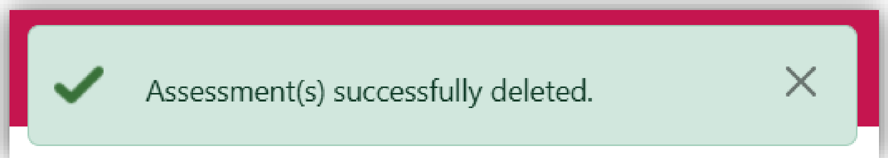
<u>Solution to Issue #1:</u>
Assessments that appear as **Assigned** indicate that the OA staff user started an assessment but did not complete nor submit the assessment. Thus, these assessments are in "draft" status. These assessments can only be deleted by the OA user that created them.

SME's can instruct their staff on how to delete these assessments if they will not be completed and/or submitted.

Note: Assessments in **Assigned** status <u>do not affect data</u> for the client. If an **Assigned** assessment is not submitted, it is okay to leave as is (Please follow the instructions or guidance provided by your organization on how they would like to handle these types of events). However, if your agency or organization requires these **Assigned** assessments to be deleted (such as for cleanup purposes), please guide your staff through the steps below.

There are two ways to access and delete an **Assigned** assessment:

<table>
<tr><th>From the Client's Assessment List</th><th>From the Clinicians List</th></tr>
<tr><td>1. Go to the Client's page and scroll down to the Assessment List.</td><td>1. On the data toolbar, under the Assessments dropdown, click on My in progress.</td></tr>
<tr><td>
</td><td>
</td></tr>
<tr><td colspan="2">2. Click the assessment to be deleted – this will open the assessment.</td></tr>
<tr><td>
</td><td>
</td></tr>
<tr><td colspan="2">3. Once the assessment is open, the Delete button will be available at the bottom right-hand corner. Click Delete.</td></tr>
<tr><td colspan="2">
</td></tr>
</table>

4. Confirmation window will appear asking to confirm action. Click **Yes**.

5. Once confirmed, the page will refresh and there will be confirmation at the top right-hand corner saying this was successfully completed.


If the OA staff user is no longer with your agency:
If the designated OA staff user is no longer with your agency, please contact the DBH-OA inbox for assistance.

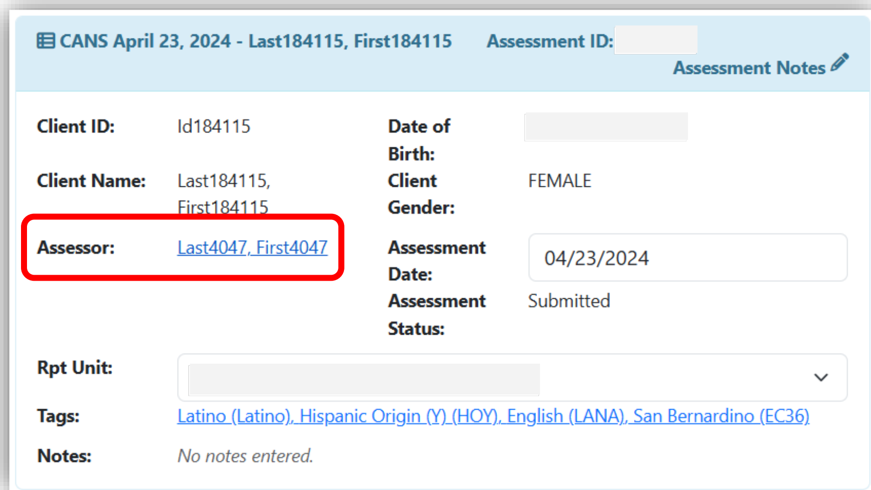
(Please see *How to Communicate with the DBH-OA Inbox* on page 58 for more information.)

Issue #2:
The OA staff user listed under the assessor field is not associated with the Reporting Unit selected for the assessment.

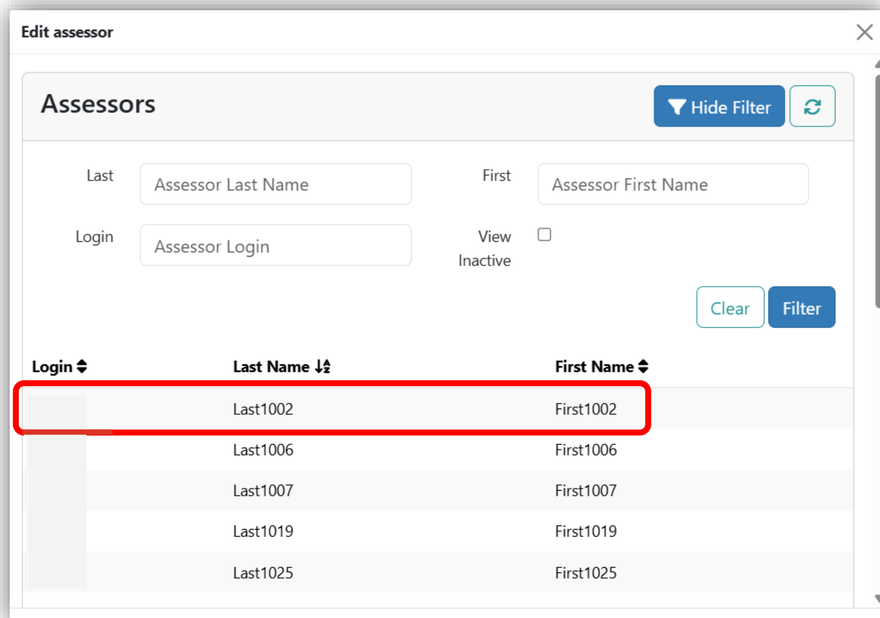
Solution to Issue #2:
Reassign the assessor while the assessment is in Edit mode. This can be done for assessments in Submitted or Approved statuses.

Note: The updated Assessor needs to be associated with the Reporting Unit/Program Assignment in order to be successfully added to the assessment.

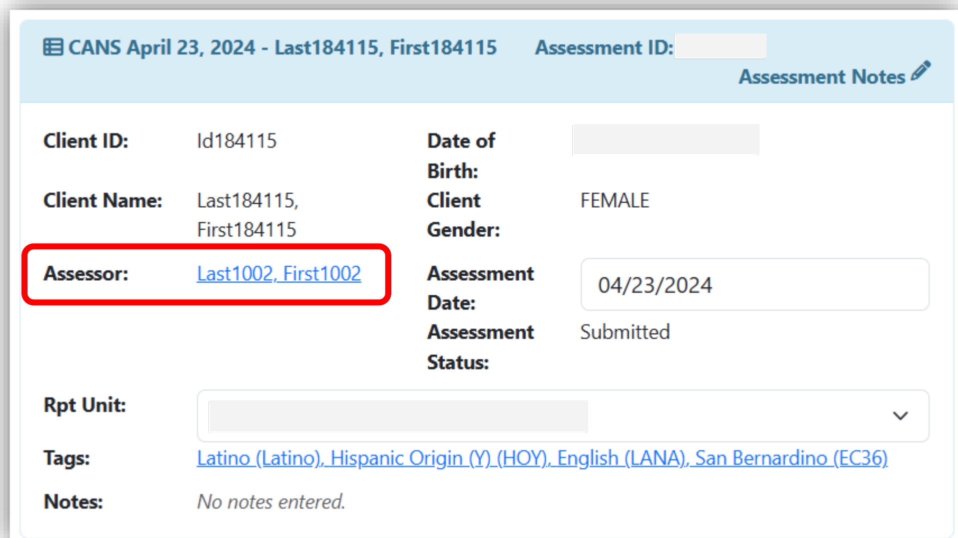
1. Go into edit mode for the assessment. Click on Assessor name (hyperlinked), and this will open a window with a list of OA users that can be selected as an assessor.



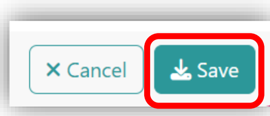
2. Filter to search for the assessor. Select an assessor.



3. Once an assessor is selected from this list, it will populate the Assessor field in the Assessment page.



4. Click **Save** at the bottom of the screen to save the Assessment.



Note: If there is an error when saving, a notification will pop up on the top right-hand corner of the screen. If this occurs, please contact the DBH-OA inbox for assistance.

Issue #3:
The TCOM assessment was entered under the wrong reporting unit.

Solution to Issue #3:
If assessment was completed in EHR:
OA reflects the information that is entered into the EHR. Thus, information needs to be corrected there first in order for it to transfer and appear correctly in OA. Access the assessment to be corrected in the EHR and update to the correct reporting unit and save according to the appropriate EHR business process.

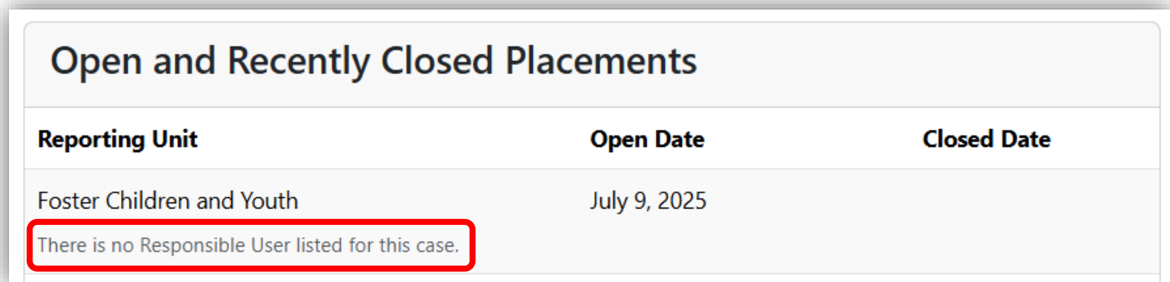
If assessment was completed in OA:
If the RU for the assessment was entered incorrectly, the assessment can be recalled by the clinician if the assessment has not been approved. The clinician can then go into edit mode and update the reporting unit to the correct one. Once saved, they can resubmit the assessment for approval. If the assessment has been submitted, and the supervisor is reviewing, they can reject the assessment, and have the clinician make the appropriate changes. If the assessment has already been approved, then the supervisor can edit and update the assessment RU.

<u>Issue #4</u>:
The assessment was completed in the EHR but is not found in OA.

<u>Solution to issue #4:</u>
OA reflects the information that is entered into the EHR, thus information needs to be verified there first. Please follow your organization's business process for this to ensure that the assessment is finalized in the EHR and resubmit. Wait at least one (1) day for the information to be reflected in OA. If the attempt fails, and no information is transferred, then please contact the DBH-OA inbox for assistance.

Program Assignments

<u>Issue #1</u>:
The client's placement in OA shows "**No Responsible User**".


Open and Recently Closed Placements

Reporting Unit	Open Date	Closed Date
Foster Children and Youth There is no Responsible User listed for this case.	July 9, 2025	

<u>Solution(s) to issue #1:</u>
Ensure the Staff has an OA account so as to link to the program assignment.
Refer to the *Searching for Prior Staff Accounts* on page 12 for how to search for staff account.

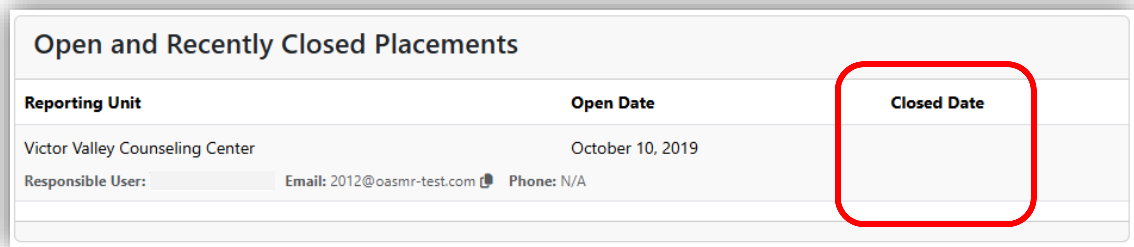
If no staff account is found in OA, but are assigned as the clinician in the EHR, then this information will not be able to be transferred between the systems *(follow procedure to create profiles for staff in OA by following the steps outlined in the Creating a New Staff Account section starting on page 14).*

If a staff account was created in OA <u>after</u> the program assignment was created in the EHR, then the program assignment in the EHR will need to be resubmitted in order to push over the updates to OA. Changes should be made visible within one (1) day. If there is no change, then please contact the DBH-OA inbox for assistance.

If staff account is found in OA,
- Ensure that the login number has no leading zeros – This will ensure that the information for the clinician transfers between the EHR and OA.
- Double check the EHR program assignment, and that the correct staff is listed.
    - If information is correct, then resubmit the program assignment. Changes should be visible within one (1) day.

- Please speak to your supervisor and/or EHR Superuser for more information on how to resubmit program assignments.
- If no changes occur, please contact the DBH-OA inbox.

Issue #2:
The program assignment is missing dates, such as no close date, despite it being closed in the EHR.



Solution to issue #2:
Please ensure that there is an end date for the program assignment in the EHR. If an end date is missing, then the end date needs to be added. Resubmit the program assignment and an update from the EHR to OA should push over within one (1) day.

If the date is not missing in the EHR program assignment, but is missing in OA, please contact the DBH-OA inbox for assistance.

Issue #3:
A client transfers Responsible User within the same Reporting Unit, but the program assignment still shows the previous Responsible User.

Solution to issue #3:
OA reflects the information that is entered into the EHR, thus information needs to be verified there first. Please follow your organization's business process for this to update the Responsible User (Clinician, Physician, etc.) in the EHR for the program assignment. The program assignment can be updated to replace the previous Responsible User with the new one and resubmit. Wait at least one (1) day for the information to be reflected in OA. If the attempt fails, and no information is transferred, then please contact the DBH-OA inbox for further assistance.

Note: Please confirm with your supervisor and/or program administrator on the appropriate procedure to follow for this type of change according to your organization.

<u>Issue #4</u>:
A client transfers clinicians within the same program assignment but still appears under the previous clinician on a clinician-based report (like the Tickler with Episodes or the Expected Assessment reports).

<u>Solution to issue #4:</u>
Ensure that the Responsible User is updated to the current clinician for the program assignment in the EHR, as well as the placement in OA. If the report's timeframe overlaps with the time when the initial Responsible User was assigned to the client, then the previous clinician will show on the report. You can wait until the 90-day timeframe runs past the initial period, or run a custom report with a more recent, shorter timeframe.

Please note that the client will continue to appear in reports within the time periods that overlap within the time the client was assigned to the clinician. This means that if a report is pulled from a timeframe outside of when the new clinician was assigned, then the prior clinician will continue to appear until the time period for the new clinician is selected.

Example Scenario:
You are a clinician that transferred a client to another clinician that is within the same reporting unit on Monday, July 1^{st}. The client has been placed under the FCY program assignment since January 1^{st}. You receive your weekly *Tickler with Episodes – Last 90 days report* in your email. What should you expect to see on this report?

	Scenario	**Dates**
Example	Tickler report timeframe (Last 90 days)	April 1^{st} – June 30^{th}
	Date report is being pulled on	July 1^{st}
	1^{st} Clinician Timeframe assigned to Client	January 1^{st} – June 30^{th}
	2^{nd} Clinician Timeframe assigned to Client (you)	July 1^{st} – present

OA reflects the information that is entered into the EHR, thus information needs to be verified there first. Please ensure that the Program assignment reflects the correct responsible user in both the EHR and in OA. If the responsible user needs to be updated, confirm with your supervisor and/or program administrator on the appropriate procedure to follow for this type of change to resubmit the program assignment. Then wait at least one (1) day for the information to be reflected in OA. If the attempt fails, and no information is transferred, then please contact the DBH-OA inbox for assistance.

Issue #5:
The program dates for a client's placement in OA do not match the dates for their program assignment in the EHR.

Solution to issue #5:
OA reflects the information that is entered into the EHR, thus information needs to be verified there first. Please follow your organization's business process for this to update Program Assignments Responsible User (Clinician, Physician, etc.) in the EHR for the Program Assignment. The program assignment can be updated to replace the previous Responsible User with the new one and resubmit. Wait at least one (1) day for the information to be reflected in OA. If the attempt fails, and no information is transferred, then please contact the DBH-OA inbox for further assistance.

Note: Please confirm with your supervisor and/or program administrator on the appropriate procedure to follow for this type of change according to your organization.

Issue #6:
The client's placement is not showing in OA after the program assignment was finalized and submitted in the EHR.

Solution to issue #6:
Open the EHR and resubmit the program assignment according to your organization's business process for this. Wait up to one (1) day for the changes to reflect in OA. If the placement still does not appear in OA, then please contact the DBH-OA inbox for further assistance.

Duplicate Clients

Issue #1:
A client was found to have two (2) (or more) accounts in OA.

Solution to issue #1:
There may be multiple reasons as to why there may have been an additional client account created. This may show up as a program assignment that is duplicated, a program assignment that was closed but still appears as open in OA, or that a responsible user assigned in the EHR does not have a user profile in OA. Clinicians should notify their SME's if this occurs.

Please contact the DBH-OA inbox for assistance and include the client information that shows the duplicate accounts.

Duplicate Staff

Issue #1:
Duplicate staff accounts found when setting up an account.

Solution to issue #1:
If multiple accounts are found for a staff member, please use the account that has the most relevant information to the OA Staff member. Login username should be the staff's assigned ID number *(please see Staff Username Requirements on page 14)* with no leading zeros. Ensure that the account that will not be used is fully deactivated *(please see Deactivating User Profiles section on page 31 to properly deactivate a staff account)*.

Please contact the DBH-OA inbox for assistance and include the staff information that indicates the duplicate accounts.

Issue #2:
The program assignment in the EHR is linking the incorrect staff user in OA.

Solution to issue #2:
The OA Staff user may have two accounts in OA, and the synchronization is having issues linking to the correct account. Please contact the DBH-OA inbox for assistance.

HOW TO COMMUNICATE WITH THE DBH-OA INBOX

As an OA Subject Matter Expert, the DBH-OA inbox is your resource for any OA-related issues. Only your program's designated SME should be communicating with the inbox. Please allow up to three (3) business days for responses. *

Information to Provide

The following information should be included when contacting the inbox (when applicable):

- A brief description of the issue
- Where you see the issue
- Screenshots showing the issue *(Please see the PHI Note below)*
    - If the issue is concerning program assignments, then please include both screenshots of the program assignment in myAvatar, as well as the placement in OA.

PHI Note

If your issue contains PHI, then please **encrypt** the email when sending PHI. This includes any images or text included in the email.

If you are unable to encrypt your message, then please send an introductory email that does not contain any PHI to the DBH-OA inbox. DBH-OA will establish an encrypted email which will make it safe to respond to. Emails encrypted by DBH will include the phrase "PHI" in the subject line.

*Please note that depending on the type of request or information sent to the inbox, this will influence the response time for some requests.

Additional Information

Depending on the complexity of your issue, your email may be elevated into a ticket. Communication stays the same, but your ticket may close if additional information requested by the inbox is not provided within the timeframe specified in the reminder email. If the ticket closes, you may ask to reopen and include the requested information.

ADDITIONAL RESOURCES FOR SUPERVISORS AND SMES

CANS-SB Website: http://wp.sbcounty.gov/dbh/cans/
Resources available:
- CANS SB 3.0 Manual
- CANS SB 3.0 Scoresheet
- CANS SB 3.0 Clinical Assessment Form
- CANS Supervisor Square
- CYCS Chart Audit Tool
- PSC-35

ANSA-SB Website: http://wp.sbcounty.gov/dbh/ansa/
Resources Available:
- ANSA-SB Manual
- ANSA-SB Scoresheet

OA Resources (Manuals, FAQ's and Other Documents):
http://wp.sbcounty.gov/dbh/tcom/
Resources Available:
- OA User Manuals
  - Basic Training Manual
  - SME Manual
  - Reports Manual
- OA FAQ's
- OA Roles Summary Sheet
- OA Trainings

OA Websites Links:
OA LIVE Website:
https://sbcans.oasmr.com/cas/login?service=https%3A%2F%2Fsbcans.oasmr.com%2Frouter%2Fj_spring_cas_security_check%3Bjsessionid%3DF8BEA2C22750E83C90F12ADE20020DDB

OA TRAIN Website:
https://training-sbcans.oasmr.com/cas/login?service=https%3A%2F%2Ftraining-sbcans.oasmr.com%2Frouter%2Fj_spring_cas_security_check%3Bjsessionid%3D2DA13804ED83A0C18ADB580DE193563B

Contact email: DBH-OA@dbh.sbcounty.gov

Note:
******The San Bernardino County Innovation and Technology Department (ITD) Help Desk does not provide support for Objective Arts******

APPENDIX A

Objective Arts Roles Summary

This is a list of the available user roles that can be assigned in Objective Arts (OA) to staff. This document was created as a resource to help aid in determining the most appropriate role to assign to staff in order to ensure they are able to complete necessary tasks in OA for their organization.
Please Note: This provides a general overview of the most commonly used tasks and how the roles differ from one another.

Roles	Permissions (Tasks)
Clinical Staff (CS)	For the clients in the Reporting Unit(s) (RU)s to whom the clinical staff is assigned, a **CS** can: • View and print Transformational Collaborative Outcomes Management (TCOM) assessments • Create, edit, and recall TCOM assessments • Edit TCOM assessments that have not yet been submitted for approval • View, print, and extract data reports and files about their clients
Office Assistants (OA)	For all clients and staff in the RU(s) to whom the office assistant/non-clinical staff is assigned, an **OA** can: • Complete all actions of a **CS**, ***and*** • Create and edit user accounts • View organizational details • View client information from the Admin Page • Temporarily open a closed client in their RU(s) • View, print, and extract data reports and files about their organization's clinical staff performance
Non-Clinical Admin (NCA)	For clients and staff in the RU(s) for which they are assigned, a **NCA can:** • Complete all actions of an **OA**, ***<u>except</u>*** • Create, edit, and recall TCOM assessments
Supervisor (SU)	For the clients and staff in the RU(s) for which they are assigned, a **SU** can: • Complete all actions of the **OA**, ***and*** • Approve, reject, and edit TCOM assessments **Note:** This role is for Clinical Supervisors only (not intended for clerical support).

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Clinical Admin (CA)	For clients and staff in the RU(s) for which they are assigned, a **CA** can: • Complete all actions of a **SU**, ***and*** • Auto-approve Adult Needs and Strengths (ANSA) assessments • Self-approve their own TCOM assessments **Note:** This role can only be assigned by others with this role.
Domain Clinical Admin (DCA)	For clients and staff in the RU(s) for which they are assigned, a **DCA** can: • Complete all actions of a **CA**, ***and*** • Delete approved assessments

APPENDIX B

Interchangeable Terms

Term	May also be referred to as:
Client	• Beneficiary, or • Member, or • Patient.
Client Number	• Client ID, or • Client Identifier, or • Medical Record Number.
Client Profile	• Patient
Staff Number	• Staff ID, or • Staff Master Number, or • myAvatar Number, or • myAvatar Staff Number.
User Profile	• Staff account
Username	• Login ID, or • Login.

Commonly Used Acronyms List

Acronym	Full name
ANSA	Adult Needs and Strengths Assessment
CANS	Child and Adolescent Needs and Strengths
HIPAA	Health Insurance Portability and Accountability Act
OA	Objective Arts
OU	Organizational Unit
PHI	Protected Health Information
PII	Personally Identifiable Information
RU	Reporting Unit
SME	Subject Matter Expert
TCOM	Transformational Collaborative Outcomes Management