



Objective Arts (OA) is a web-based data system that is used by the San Bernardino County Department of Behavioral Health (DBH) to provide structure to the utilization of Transformational Collaborative Outcomes Management (TCOM) tools (e.g., CANS, ANSA, & PSC-35) as required by the Department of Health Care Services (DHCS).

TCOM users utilize Objective Arts to record and share information. Since this data is entered into the OA system, TRAIN accounts are created to allow a user to test the OA environment and its features beforehand. This allows users to test the site as much as they need or want, without compromising any of the available client data.

Program/Organization Supervisor and/or OA Subject Matter Experts (SMEs) are responsible for setting up OA TRAIN accounts for staff when they enroll in the Objective Arts Basic Training (Online Module).

Please Note: If your staff do not have access to the course via Relias, you will need to provide them with the Objective Arts Basic Training (Online Module) weblink and password. To obtain the training weblink and password, please contact the DBH-OA inbox at (DBH-OA@dbh.sbcounty.gov).

Creating a TRAIN Account – Overview

Creating an account will be similar to creating a staff account in the LIVE environment. Instructions on how to create staff accounts can be found in the [Objective Arts Subject Matter Expert Manual](#), beginning on the MANAGING USER PROFILES section.

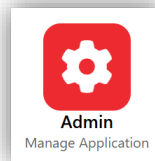
Steps to Creating a TRAIN Account

Search for Prior Staff Accounts

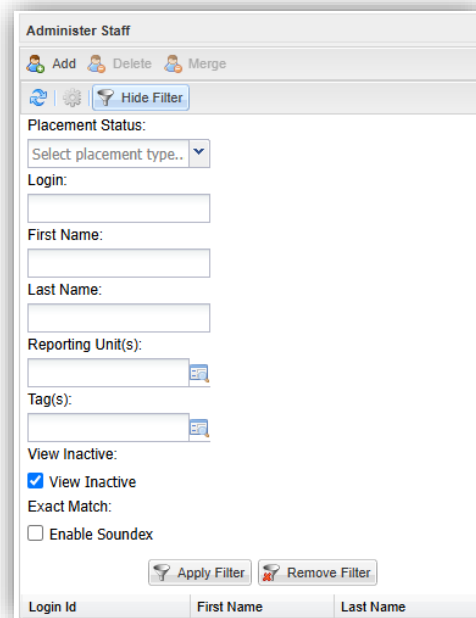
Search for prior staff account, in order to avoid duplication via the following steps.

1. Log into Objective Arts **TRAIN** by entering in your username and password.
 - **Training (TRAIN) Link:** <https://training-sbcans.oasmr.com>

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



- Click on the  icon. This will open the **Filter** list.



The image shows a screenshot of the "Administer Staff" application window. At the top, there are buttons for "Add", "Delete", and "Merge". Below these are "Refresh", "Filter", and "Hide Filter" buttons. The main area contains several search filters: "Placement Status" with a dropdown menu, "Login" with a text input field, "First Name" with a text input field, "Last Name" with a text input field, "Reporting Unit(s)" with a text input field and a search icon, and "Tag(s)" with a text input field and a search icon. There are also checkboxes for "View Inactive" (checked) and "Exact Match" (unchecked), and an "Enable Soundex" checkbox. At the bottom, there are "Apply Filter" and "Remove Filter" buttons, and a table header with columns for "Login Id", "First Name", and "Last Name".

Tip: Search using partial information to expand search as much as possible.

- Enter the staff member's information into the search parameters.

Recommended Search Parameters (as applicable):

- **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**.

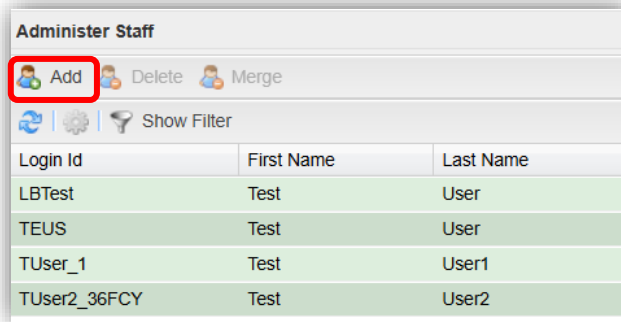
Note: Entering in just the first few letters of the staff member's name is a safe way to find existing accounts without restricting your results to a specific name that may have changed or is spelled differently than what you would expect.

5. 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**.

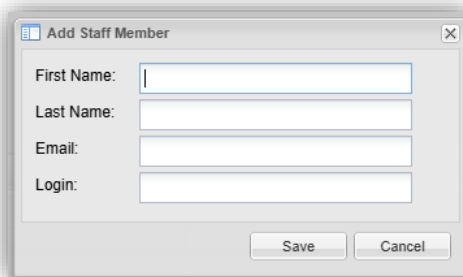
Creating a New Staff Account

After Searching for Prior Staff Accounts and verifying that no prior account exists, you can create a new account.

1. To create a new account for a staff member, click the **Add** button located on the top left of the screen.

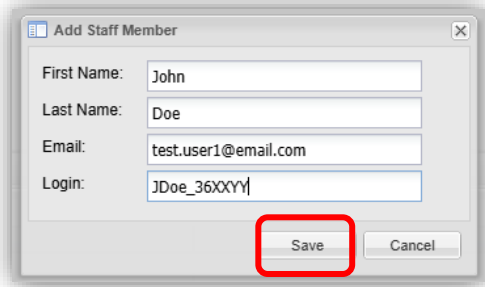


2. A dialog box will open. Enter the staff members' information:
 - First name
 - Last name
 - Email
 - Login



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

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



The screenshot shows a dialog box titled "Add Staff Member" with the following fields: First Name: John, Last Name: Doe, Email: test.user1@email.com, and Login: JDoe_36XXYY. The "Save" button is highlighted with a red rectangle.

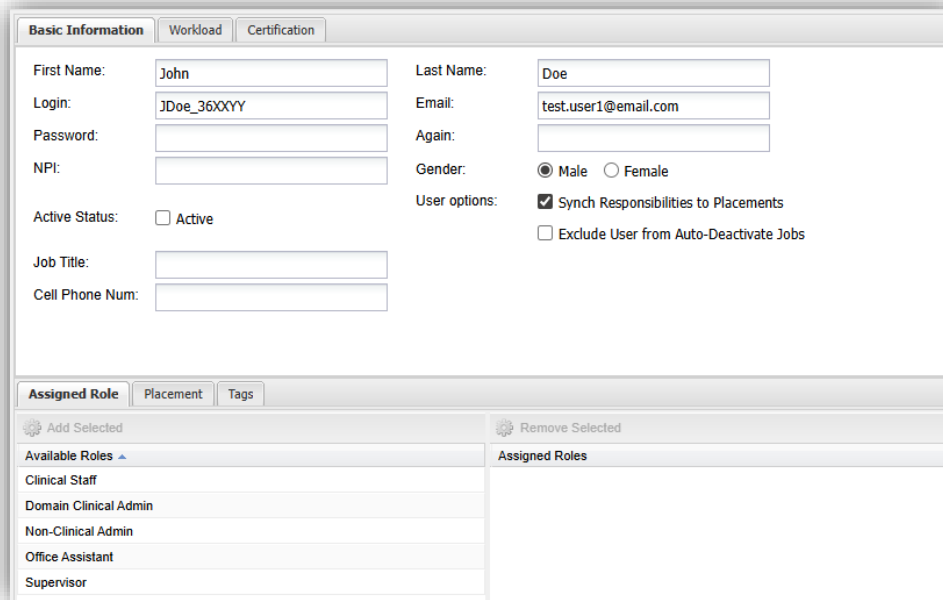
Example: John Doe is a Non-DBH/clerical staff member for RU 36XXYY.

4. Follow the steps for Searching for Prior Staff Accounts above 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.

Complete Setting Up Account – 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.



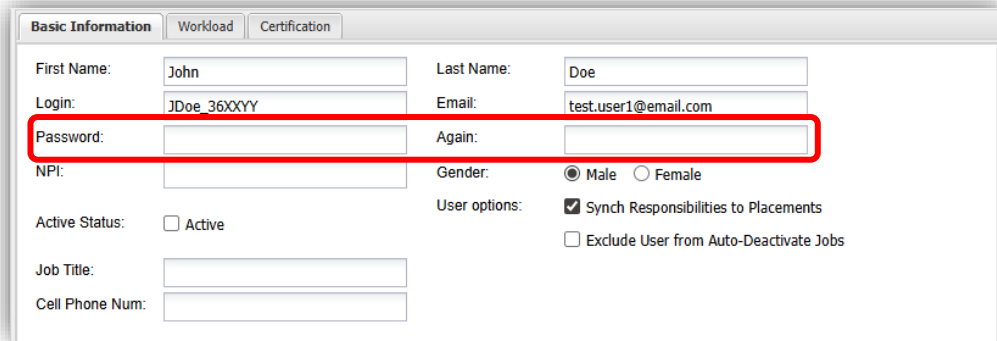
The screenshot shows the "Basic Information" tab of a staff member profile. The form includes the following fields and options:

- First Name: John
- Last Name: Doe
- Login: JDoe_36XXYY
- Email: test.user1@email.com
- Password: [Empty]
- Again: [Empty]
- NPI: [Empty]
- Gender: Male Female
- Active Status: Active
- User options: Synch Responsibilities to Placements, Exclude User from Auto-Deactivate Jobs
- Job Title: [Empty]
- Cell Phone Num: [Empty]

Below the form, there are tabs for "Assigned Role", "Placement", and "Tags". The "Assigned Role" tab is active, showing a list of available roles: Clinical Staff, Domain Clinical Admin, Non-Clinical Admin, Office Assistant, and Supervisor. There are also "Add Selected" and "Remove Selected" buttons.

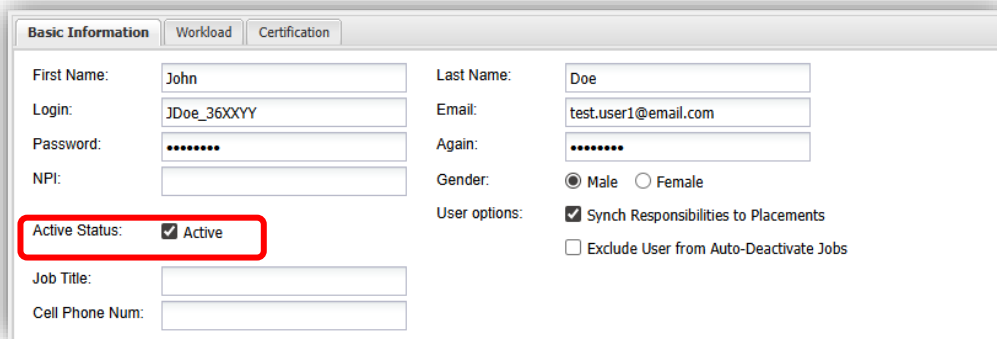
1. Assign a **Password** and confirm the password in the **Again** box.
REMINDER: Passwords must be at least seven (7) characters in length and include at least one number and one capital letter.

Example Temporary Password: Newpass1

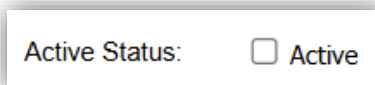


The screenshot shows a user profile form with the following fields: First Name (John), Last Name (Doe), Login (JDoe_36XXYY), Email (test.user1@email.com), Password (empty), Again (empty), NPI (empty), Gender (Male selected), Active Status (Active unchecked), Job Title (empty), Cell Phone Num (empty), and User options (Synch Responsibilities to Placements checked, Exclude User from Auto-Deactivate Jobs unchecked). The Password and Again fields are highlighted with a red box.

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



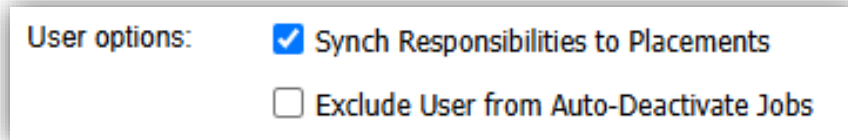
The screenshot shows the same user profile form as above, but with the Active Status checkbox checked and highlighted with a red box. The Password and Again fields now contain seven asterisks (*****).



Active Status: Active

If unchecked, the account is INACTIVE, and staff will not be able to log in.

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



User options: Synch Responsibilities to Placements
 Exclude User from Auto-Deactivate Jobs

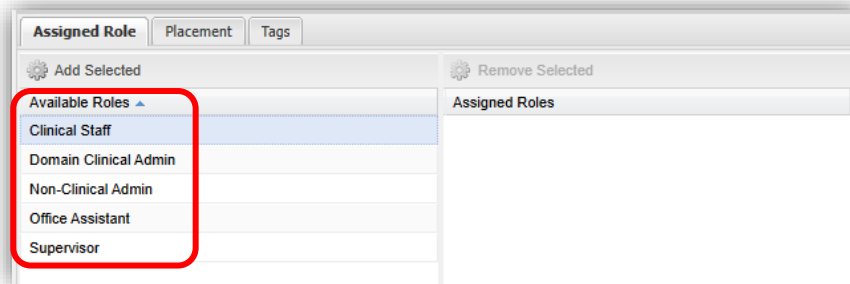
4. The remaining fields are **OPTIONAL**. Add information to these fields as needed:
 - National Provider Identifier (NPI)
 - Gender
 - Job Title
 - Cell Phone Number
5. Click **Save** to save all updates. Proceed to assigning a role.

Assigning a Role

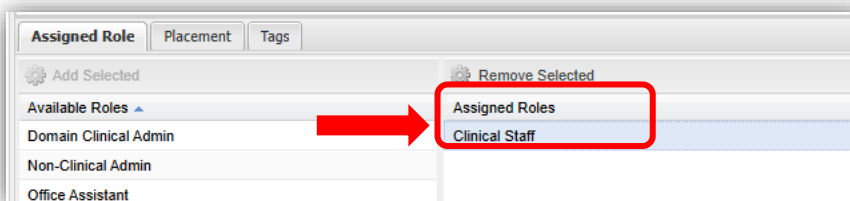
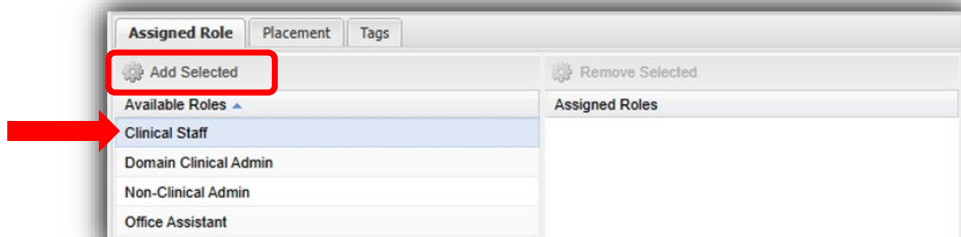
Assigned Roles determine what tasks users can complete in OA. You can only assign user roles that are equal to or less than your own. Ideally, only one role should be assigned. However, exceptions may apply.

For a TRAIN account, Clinical Staff is the recommended role.

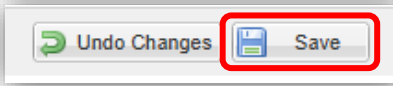
1. From the Assigned Role tab in the Available Roles pane, click on the appropriate role for the staff member to assign.



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.



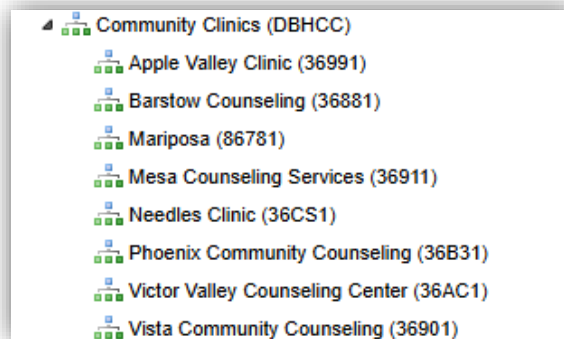
- Click the **Save** button to apply your changes. Proceed to adding a placement.



Adding Placements

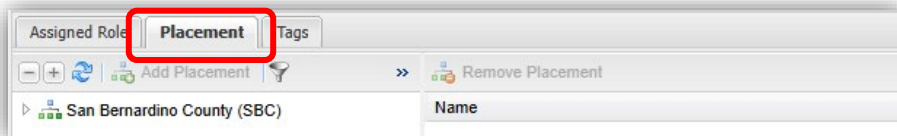
Placements for staff are the Reporting Unit(s) that they are associated with within their organization. Assigning a placement allows staff to view the clients that are receiving services within their organization under their program.

For a TRAIN account, add the staff's corresponding RU. If no other RU is available, add the Foster Children and Youth (FCY) reporting unit.

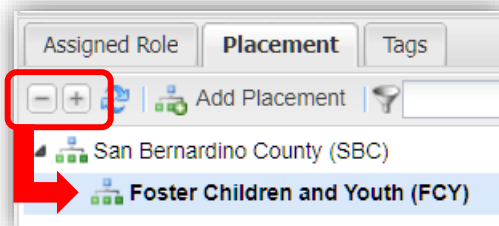
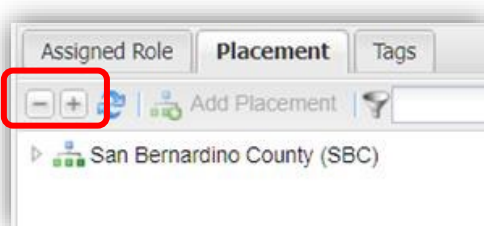


Each program has a unique Reporting Unit code that is used to link a client to the exact program they are receiving services from.

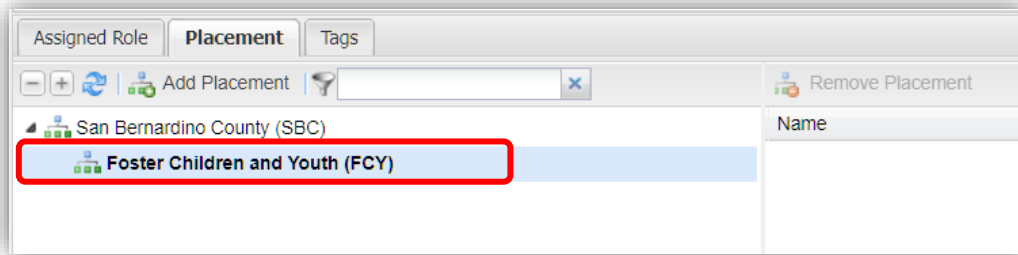
- With a staff profile open, click on the **Placement** tab.



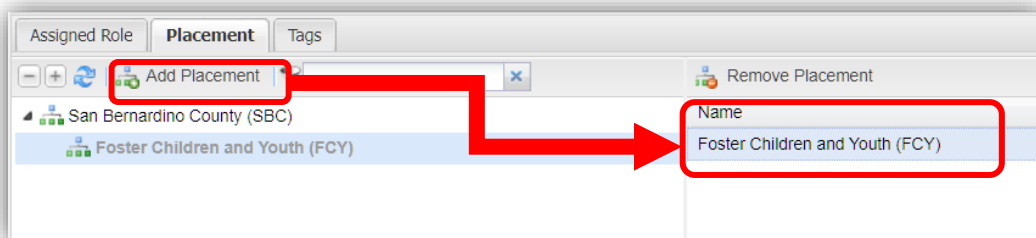
- Click on the **+** icon from the  buttons to expand the organization hierarchy.



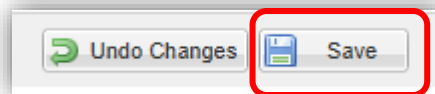
3. Select the RU(s) that the user is associated with.



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.



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



TRAIN Account Set Up Completed – Next Steps

Provide staff with the Login ID and Password credentials to log into OA [TRAIN](#).

1. Verify that staff is able to log into OA [TRAIN](#).
2. If any issues occur, please notify the OA Inbox (DBH-OA@dbh.sbcounty.gov).
3. If your staff do not have access to Relias – Provide staff with the **Objective Arts Basic Training (Online Module)** weblink and password to access the training. To obtain the training weblink and password, please contact the DBH-OA inbox at (DBH-OA@dbh.sbcounty.gov).

Important Note: In order to maintain a clean testing environment, the OA TRAIN site resets the 1st Sunday of the month.

What this can affect: If a staff member has not completed their Basic Training and have not yet had their OA LIVE account created, their OA TRAIN account may be deleted in this reset time period. To prevent this, please advise staff to complete the training before the 1st Sunday of the month. Otherwise, another TRAIN account will need to be created for the staff member.