Objective Arts FAQ's

Site Navigation (Where is this? How do I see that?)

A. Where do I go to view the assessments submitted by staff in my program?

1. View All Assessments by following these steps:
   i. From the home screen, click Data Portal
   ii. On the navigation bar at the top of the screen, select 'Assessments'
   iii. Select 'List'

B. Where do I go to approve ~~A~~ssessments submitted by staff in my program?

1. Approve Assessments by following these steps:
   i. From the home screen, click Data Portal
   ii. On the navigation bar at the top of the screen, select 'Assessments'
   iii. Select Approve
   iv. At the bottom, select between sequential approval, and batch approval (or select an individual assessment to approve just that assessment)
   v. Review each assessment and click approve or reject at the bottom

C. Where do I go to View my or my staff's workload?

1. View your Workload by following these steps:
   i. From the home screen, select the 'Workload' icon
2. View your staff's Workload by following these steps:
   i. From the home screen, click Admin
   ii. Filter for a specific staff member whose workload you want to see by selecting 'Show Filter', and entering at least one piece of requested information
   iii. Double click the staff member's name
   iv. At the top of the pane, select the 'Workload' tab

Administrative Activities (I forgot/lost my password? How do I add my new staff member?)

A. Who needs to have an OA user account?

1. All staff who do one or more of the following must have an OA account:
   i. Enter CANS/ANSA
   ii. Approve CANS/ANSA
   iii. Pull/review CANS/ANSA data reports

2. All staff who completed an assessment that will be uploaded into the OA system must have an OA user account created for them. Even if the staff member is no longer with your agency/program, there must be an account in OA for the assessment to link to.

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

1. From the OA Website (https://sbcans.oasmr.com), click the "Forgot your password?" link below the login button
2. Enter your username in the 'User name' field
3. Enter your email in the 'Email' field
   i. This email must match the email associated with your account in OA
4. Select the checkbox for 'I'm not a robot'
5. Click request. You will receive a password reset link in your email inbox within a few minutes
6. Once you receive the password reset, open the email, and click the Reset Password link to open a webpage
7. Enter your username in the 'User name' field.
8. Enter the desired password in the 'Password' and 'Repeat Password' fields

i. Passwords must be at least seven (7) characters in length, include at least one (1) uppercase letter, and at least one (1) number.
ii. Click submit

9. The next time you log in, you will use this changed password.

Note: If you do not receive the email with the password rest link, contact your agency's OA subject matter expert (SME).

i. The email entered for you in Objective Arts may have been incorrectly entered.
ii. You may have tried to enter the wrong password more than three times. If so, the system will not allow you to request a password reset. As a way to verify that it is you requesting to change your password, the SME must enter a generic password into the system and provide that password to you to change upon successful logged in.

C. How do I add a client to OA?

1. Clients are added to the OA system via a DBH billing system data upload. No OA users are able to create or delete a client or client information from OA.
2. If a client was mistakenly opened to your program in the DBH billing system, and then that opening was deleted from the DBH billing system but has not been removed from your program in OA, please contact your program's Objective Arts SME.

D. How do I find a client?

1. View a specific client by following these steps:
   i. From the Home screen, click Data Portal. The RU's Client List is will show
   ii. Click Show Filter
   iii. Search using the client's DBH medical record number or first and last name. If you have trouble finding a client with a hyphenated last name, try searching by removing the hyphen. The spelling of names comes from the DBH billing system, which saves whatever was input by the person that completed the initial client information in SIMON. If you find that a client's name is misspelled, you can have your billing clerk make the change in the DBH billing system.

E. Who is authorized to approve/reject CANS/ANSA assessments?

1. An OA user with the role of Supervisor, Clinical Administrator or Domain Clinical Administrator is able to approve or reject CANS/ANSA assessments. Should you need to delete a CANS/ANSA, only a Domain Clinical Administrator can delete CANS assessments from the system.

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

1. Add Staff by following these steps:
   i. From the home screen, click Admin
   ii. At the top left, beneath Administer Staff, click the Add a New Staff Member button
   iii. The Add Staff Member box will appear
   iv. Enter the person's First Name
   v. Enter the persons' Last Name
   vi. Enter the person's Email
   vii. Enter the Login
      1. For staff who will be completing a CANS/ANSA, the Login is the staff member's Simon number,
         a. If the staff member does not have a SIMON number, you must cancel this transaction and complete the IT Staff Master form for requesting a SIMON number. Once a SIMON number has been assigned to this staff member, return to step 1 to start this process again.
      2. If the staff member will not be completing a CANS/ANSA, but may be completing the data entry, does not need a SIMON number, and is working for a DBH contract agency, use the following naming convention:

FirstInitialMiddleInitialLastName_RU (e.g., Donald D. Duck working in RU 36XXYY: DDDuck_36XXYY).
            3. For a DBH staff member who does not have a SIMON number because they do not bill and will be completing data entry and/or monitoring a program's CANS/ANSA data, use the staff member's DBH employee number.

- **viii.** Locate the new Staff member by utilizing the show filter button
    1. Be sure to have 'Show Not Placed' checked under placement status
- **ix.** Double click the staff member
- **x.** On the top pane, enter the staff member's temporary password in the password box, then again under the again box.
    1. The temporary password will need to change upon the first log in.
    2. The password must be at least seven (7) characters in length, contain at least one (1) capital letter and at least one (1) number
- **xi.** Check the "Active" box to activate the staff member
- **xii.** Under the Assigned Role tab, located below the basic information box, double click the role you wish to assign the person (you may also single click the role and then click 'Add Selected' to assign the role). The role will appear to the right.
- **xiii.** Click on the Placement tab located to the right of the Assigned Role tab
    1. If necessary, expand the list by clicking on the plus sign
    2. You may also need to single click the white arrow that appears before the program name to view the program RU(s)
- **xiv.** Select the RU(s) the staff member will work in by either single-clicking and selecting 'Add Placement' (located on the blue bar above the list of RUs), or by clicking and dragging the RU from its current position to the "Name" box on the right.
- **xv.** Click 'Save' to successfully add the new user account for your staff member

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

1. It sounds like the staff member's Placement has not been set. To assign the Placement(s):
    - **i.** From the home screen, click Admin
    - **ii.** Utilize the filter to find the staff member
        1. You may need to have both 'Show Placed' and 'Not Placed' checked
    - **iii.** Double click the staff member
    - **iv.** On the bottom pane, click the placement tab
    - **v.** Assign the staff member to the appropriate RU.
    - **vi.** Check that the 'Active' box has been checked for the staff member
    - **vii.** Click 'Save'. The staff member should now be able to view clients

2. If the correct RU placement(s) have been set, check the staff member's Responsibilities:
    - **i.** From the home screen, click Admin
    - **ii.** Select System Setup
    - **iii.** Hover over Administration
    - **iv.** Select 'Responsibilities' in the box to the right
    - **v.** Select 'Show Filter' to filter to find the staff member
    - **vi.** Double click the staff member
    - **vii.** Check that all of the correct RUs show in the far-right panel
        1. If the correct RUs are not showing, assign the staff member the appropriate RU(s)
    - **viii.** Click Save. The staff member should now be able to view clients

CANS/ANSA Assessments (How do I find the assessment I just completed?)

A. Can items on an approved CANS/ANSA be changed if we notice a mistake?
   1. Yes. However, only an OA user with the role of a Clinical Administrator or Domain Clinical Administrator can edit a CANS assessment that has been approved
   2. Please note that all edits to an approved CANS assessment requires a reason for the edit

B. Can I skip an item on the CANS/ANSA?
   1. Core CANS/ANSA items cannot be skipped. Every item in a required module must be completed.
      i. Please review the CANS/ANSA manual for guidance on scoring items you are not sure about.

C. I'm entering a CANS Assessment for another User in my program. How do I change the assessor name from my name to the actual assessor's name?
   1. There is a process to completing a CANS/ANSA for another User in your assigned program:
      i. From the home screen, click Data Portal.
      ii. Utilize the filter to find the client in question, then double click the name to navigate to the client's assessment history screen
      iii. Select 'New Assessment' located along the bottom
      iv. Select CANS or ANSA
      v. In the new assessment, enter the date the assessment was completed
      vi. Change the Assessor by clicking your name (in blue)
      vii. Select the name of the staff member who completed the assessment
         1. Select 'Show Filter' to filter for the staff member if necessary
      viii. Be sure you see the name change from your name to the other user's name in the form.

D. I need to enter a CANS/ANSA assessment for a client who has a closed episode with my program. How do I do this?
   1. To enter an assessment for a client who no longer has an active placement in your program, someone in an OA role with Administration permissions must temporarily reactivate the client's placement to the program.
      i. Temporarily make the client Active:
         1. From the home screen, click Admin
         2. At the top, select System Setup, then hover the mouse over Administration
         3. Click Clients to the right
         4. Utilize the filter to find the client. Be sure to have show 'Not Placed' selected
         5. Double click the client's name
         6. Go to the "Remove Placement" area (lower right area), there is a "Temp Open" check box; check the box next to your program name and reporting unit
         7. Select "Save" at the bottom of the page to save these changes.
   2. You will now be able to enter assessments for the client.
      i. You will have three days to enter assessment for this client before the client reverts back to being inactive in your RU.
      ii. **Best Practice**: After entering the CANS/ANSA for the temp open client, you should go back to the client screen utilizing the steps above and uncheck the temp open box.

Reports (Can I see what clients need a first CANS/ANSA?)

A. I want to know which clients need of a first CANS/ANSA, where do I go?
   1. Run a Tickler with Episodes report by following these steps (this report is also auto-emailed to users weekly):
      - **i.** From the home screen, click Reports.
      - **ii.** Select 'New'
      - **iii.** From the Report Types menu, double click Tickler with Episodes
      - **iv.** In the parameters pane on the right of the screen, select only:
         1. Instrument
         2. Reporting Units
      - v. Select 'Save' at the top of the parameters field (next to Cancel)
      - vi. The report will now show in the Personal Reports area of the screen
      - vii. Single click the report name
      - viii. Select the drop-down arrow for 'Run'
      - ix. Select "Immediate" to run the report in another window, or "Delivered" to have the report emailed to you
      - x. Check the "Initial" column for each listed client to see the date the initial assessment is/was expected