

OA-SMR Roles and Permissions Decision Points – 8.28.2015

I am happy to report that we have reached some decision points on the following roles and permissions within the Objective Arts -Service Management Record (OA-SMR) Automated CANS System. Please see table below...

Role/Permission	Request	Decision
Clerical Staff: May create and enter CANS assessment data only. The draft CANS assessment is submitted to either Senior Clinician or Supervisor Clinician for approval.	Allow Clerical Staff to approve CANS	Yes, Clerical Staff may approve CANS
Clinician: Has access to view CANS and reports for any client with an open episode in assigned RU(s) including CANS data entered by other RU/CBOs. May create and enter CANS assessment as a draft only. It must be finalized by supervisor.	Allow Clinician to approve CANS	This will remain the default role that will be used primarily for Graduate Trainee/student interns.
Senior Clinician: same permissions as Clinician, but can approve their own assessment.	Develop clear criteria for designation of Senior Clinician	All (LHPA) Licensed Practitioners of the Healing Arts (PhD-Licensed, PsyD-Licensed, LCSW, LMFT, LPCC, LPCC-F) and Waivered Staff (PhD-Waivered, PsyD-Waivered, MFT-Intern, ASW, PCC-Intern) may be designated as Senior Clinicians.
Supervisor Clinician same permissions as Clinician and Senior Clinician. Approve CANS submitted by Clinicians. Has access to all Senior Clinician assessments, but not required to approve. They can do produce reports for assigned RUs and can write/edit assessments.	Establish policy and procedure for CANS Review and Approval	QA will develop a Policy and Procedure for CANS Assessment Review that will be incorporated into CQRT process.
CBO Director: same as Supervisor Clinician except for access to all RUs across organization. Can produce reports for entire agency.		
CBO System Administrator: responsible for account set up (assigns CB users to RUs, sets user roles within agency). Can upload data; access client level and agency level data; produce reports for entire agency and can edit finalized assessments		

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