

## OA System Administrator Update – 11.20.2015

Greetings Administrators,

FYI... BHCS Information Systems has updated the OA Readiness Checklist and Administrator's Guide to include helpful hints on the items below:

- a) Order of Events/Actions: (certifications, what to check in OA Training, followed by what to do in Production)
- b) Default Clinician Role
- c) Placements "Agency/Organization versus Reporting Unit"
- d) Lead CBO Administrator Role
- e) Certification Management (see Admin Guide)

We have changed the Order of Actions on the Readiness Checklist to clarify workflow between OA Training vs. OA Production. Please see the SUMMARY OF NEW INFORMATION At the end of this email.

All of these items have been incorporated into the revised **OA Readiness Checklist** and **OA Administrator Quick Reference Guide**. Both documents dated 11/19/2015 will be posted on the **Alameda County BHCS Provider's Website** <http://www.acbhcs.org/providers/CANS/resources.htm>  
The revised versions are also attached to this email with blue highlights indicating changes.

### SUMMARY OF NEW INFORMATION (OA System Admin Update 2015-11-19)

#### TOPIC ONE: Order of Actions:

CBO Admins should first work in the OA Training environment, concentrating on client episodes, certifications and whether all staff exist in OA.

**FIRST:** Before we give access to OA Production, we want CBO and BHCS Administrators to:

1. Verify that their staff are in OA Training (If not, fix in InSyst and/or Clinician's Gateway)
2. Verify that their client episodes are cleaned up and are in OA Training. (If not, fix in InSyst)
3. Work with Alex to verify that their staff certifications are transferred to OA Training (If not, fix with Alex Jackson and Lauren Schmidt)

After the three items above are complete, CBOs should contact Alex who will pass approval on to IS. We, in IS, will work with the agencies to verify that client episodes and staff are in OA before giving them passwords to Production. **Once they fix client episodes, verify certifications are in OA and most of their staff are in OA, then we can give the Admin access to Production for staff updating only.**

**SECOND:** They should hold staff updates until they have access to Production. All data moves from Production into Training. For this reason we recommend updating staff placements and roles **ONLY** in Production. Do not bother to make corrections to staff profiles or placements in Training because updates will not be transferred up-stream to Production.

1. Roles – Fix in Production (Note: CBO and BHCS Administrators cannot see staff at their same level in the Administer Staff view. Any changes must be requested by someone with a higher level)

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2. Placements - Fix or Fine-tune in Production
3. Profiles – fix in Clinician's Gateway if Clinician's Gateway users, fix in OA if not Clinician's Gateway users.
4. **We have created a new Role called CBO Lead Administrator.** The Lead Administrator can see and update the other CBO Administrators in their Placements. They can see regular CBO Administrators on the Shared Reports. Viewing of or Changes to themselves must be requested from someone with higher level of authority such as Alex or BHCS-IS.

**THIRD:** The users can't participate in proper training until they have their own proper settings. Therefore we recommend delaying training until the staff have been updated in Production. The Administrator has the ability to update them in the Training environment if desired. However, they would then need to duplicate the updates in Production later.

### **TOPIC TWO: Default Clinician**

All New staff are defaulted with the Role of Clinician on their OA accounts. With this Role, they can write assessments if they are certified, but approval is required in order to finalize them.

- Remove Clinician role if it is not appropriate for the staff such as clerical or director roles.
- If they will be writing assessments, it is not necessary to remove the Clinician role.
- Add a higher role if it is appropriate. (Approval will not be needed with the higher role even if the Clinician role remains)
- Add a different role if it is appropriate.

### **TOPIC THREE: Organizational versus RU Placements**

Users who were uploaded from the OA User Spreadsheet were loaded with the Placement for the entire organization. Users who were also uploaded from Clinician's Gateway, have the reporting units from Clinician's Gateway also on their accounts. There are ramifications resulting from having the entire organization as a Placement. As the CBO Administrator you will want to decide what works best for your work flow.

∅ *A user who has the entire organization can see all staff and clients within that organization.*

∅ *A user with only a few RUs can only see staff and clients within those few RUs.*

∅ *For example: Supervisors will see all assessments needing approval for all of their placements. Hence, if the supervisor has the entire organization, they will see all assessments needing approval for the entire organization. Supervisors with only a few RUs will only see assessments needing approval from those RUs.*

∅ *You may reduce their ability to view and to enter data by removing the organization and adding the reporting unit placements. It is a trade-off between seeing more or less. A staff can only act or see according to the placements that are assigned.*

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The top screenshot shows the 'Placement' tab in the OA System Administrator interface. The 'Add Placement' search box is empty. The list of placements includes 'Fred Finch (FREDFINCH)', 'FRED FINCH YOUTH CTR TBS MHS (018413)', 'FFYC MADISON SCH DAY REHAB CH (018415)', 'FFYC MADISON SCH MH CH (018419)', and 'FFYC IN-HOME CRISIS MHS CHILD (018423)'. A callout box points to the 'Fred Finch (FREDFINCH)' entry, stating: "Placement for the entire organization allows viewing of the entire staff and clients".

The bottom screenshot shows the 'Placement' tab with the search filter 'fred'. The list of placements is filtered to show 'Fred Finch (FREDFINCH)', 'FRED FINCH YOUTH CTR TBS MHS (018413)', 'FFYC MADISON SCH DAY REHAB CH (018415)', 'FFYC MADISON SCH MH CH (018419)', and 'FFYC IN-HOME CRISIS MHS CHILD (018423)'. A callout box points to the 'FFYC MADISON SCH DAY REHAB CH (018415)' entry, stating: "Staff placed in a single RU can only see staff and clients who are also in that RU".

### TOPIC FOUR: CERTIFICATION MANAGEMENT

1. **Certification Management:** Alameda County CANS and ANSA Certification is done on-line via the Praed Foundation's Collaborative Training website at [www.canstraining.com](http://www.canstraining.com)
  - CANS/ANSA Certification is required for all Users (Clinicians, Senior Clinicians, Supervisor-Clinicians)
  - To become certified to use the tool you must read a 1-page fictional vignette and rate items on the Alameda County CANS or ANSA-T.
  - You must score at least a .70 to pass certification.
  - The certification is valid for one year and to continue using the CANS/ANSA tool you must recertify annually.
  - There is no cost to Alameda County BHCS providers or need for a coupon. We got you covered!

### **Instructions for Registering in California—Alameda County Jurisdiction**

- Go to: [www.canstraining.com](http://www.canstraining.com)
- Click on "register"
- Fill in the required fields:
  - o Username (please create one)
  - o First name
  - o Last name
  - o **Valid email address (please use your work email address)**
  - o Create a password
  - o Enter the password a second time to confirm
- Click "next"
- Select the **Jurisdiction** "California—Alameda County" from the drop down box

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- Select your **Agency** from the drop down box (**if you don't see your Agency, please contact Alex Jackson to have it added**)
- Enter the required fields:
  - o Phone number
  - o **External ID** (This is your InSyst Staff ID#)
- The rest of the fields are optional
- Click "register"
- Once registered, you can visit [www.canstraining.com](http://www.canstraining.com) at any time to refresh your CANS/ANSA information or take a practice vignette to refresh ratings a CANS/ANSA. We encourage you to take full advantage of the site.

**Lastly, after registering with External ID (InSyst ID #) and California-Alameda County jurisdiction, certifications will transfer into OA. Contact the individuals below for problem resolution.**

Lauren Schmidt: phone [773-256-5189](tel:773-256-5189), [lschmidt@chapinhall.org](mailto:lschmidt@chapinhall.org)

April Fernando: phone [773-256-5170](tel:773-256-5170), [afernando@chapinhall.org](mailto:afernando@chapinhall.org), fax [773-256-5370](tel:773-256-5370)

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