



Alameda County

Objective Arts Training Manual Administration

Behavioral Health Care Services

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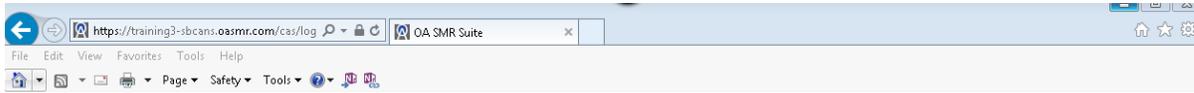
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Logging in to Objective Arts

1. Log on to Objective Arts at: <https://alameda.oasmr.com>

- Your user name is your INSYST number.
- You will be supplied with a password from your agency's designated OA super-user.
- OA super users are the point persons for all OA related questions for your agency's staff. They will help staff with logging in, entry issues, etc. Super users will be your agency's designated persons to contact BHCS with Objective Arts related questions and issues that they are unable to help staff with.

2. Enter the password exactly as it was given to you, it is case sensitive.



Objective Arts Training2

Please Login

User Name

Password

LOGIN CLEAR

[Forgot your password?](#)

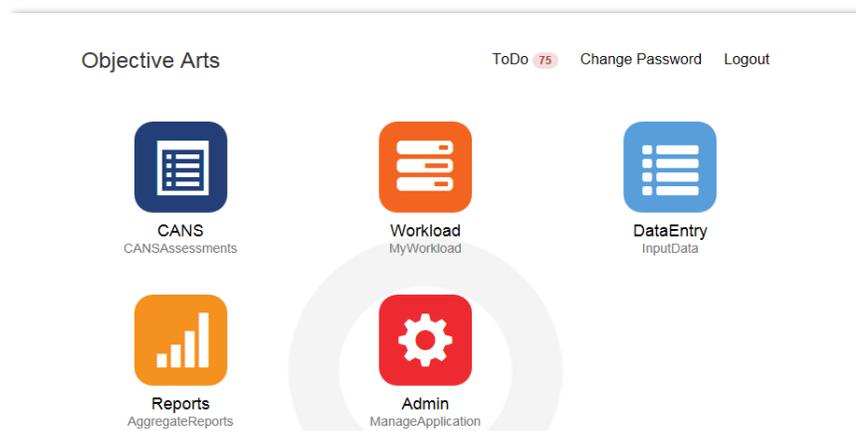
For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!

User Name is SIMON Number

Password given to you by your OA Administrator.

After logging in, the following screen appears. The options on this screen will depend on your role in Objective Arts.

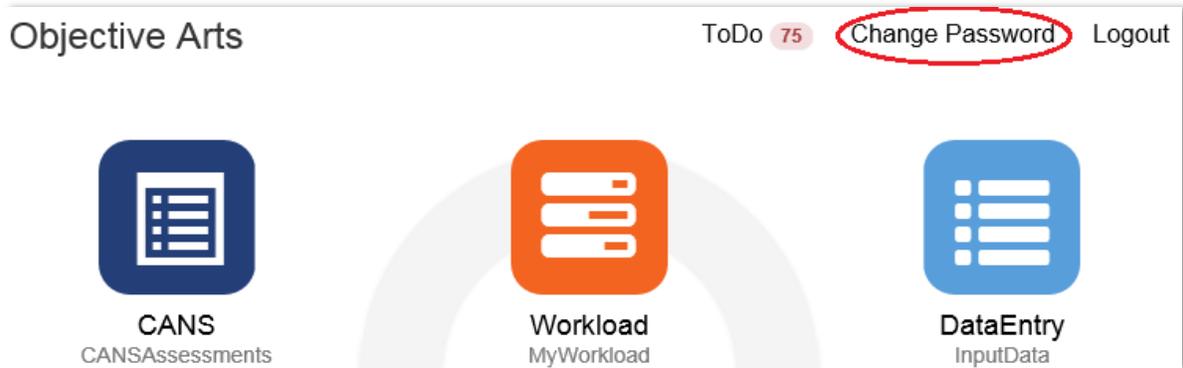
This is referred to as the **Dashboard of Menu Options (Home Screen)**



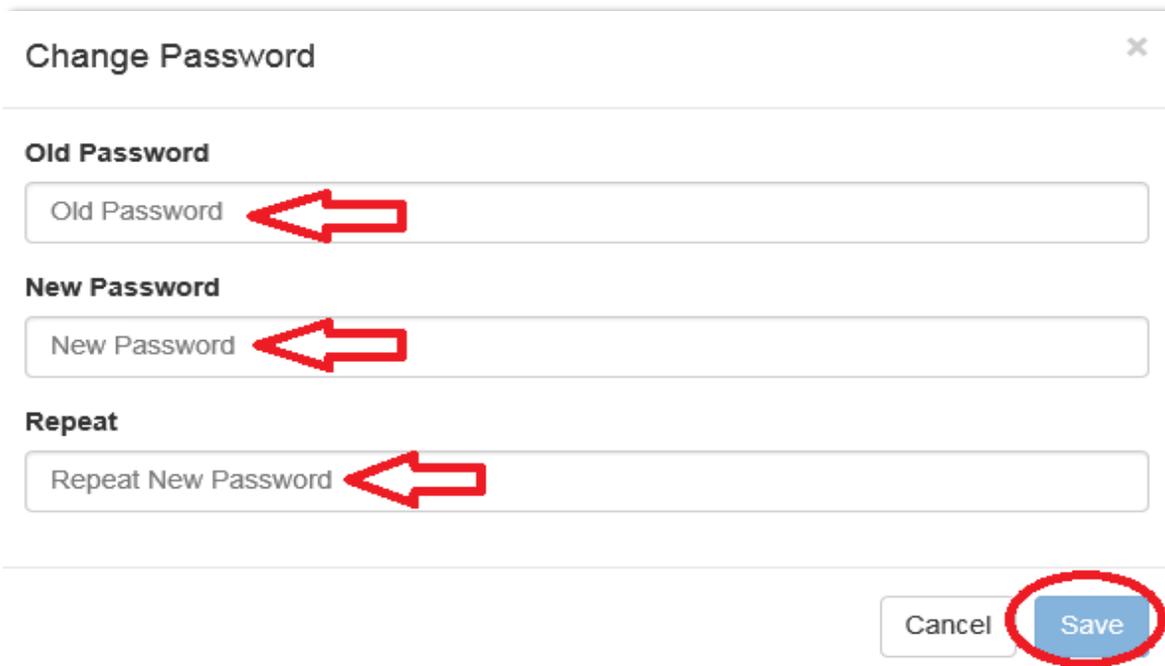
Changing your Password

The first time you login, you will be required to change your password, but will not be prompted to do so. To change your password, you will need to be at the **Dashboard of Menu Options**.

1. Click on the Change Password link at the top right of the page.



2. Enter your Old password supplied by your OA Super User.
3. Then enter your new password
 - It must be at least six characters and one capital letter.
 - Repeat to confirm.
4. Click Save.



The screenshot shows a "Change Password" dialog box. It has a title bar with "Change Password" and a close button (X). The form contains three input fields: "Old Password", "New Password", and "Repeat". Each input field has a red arrow pointing to it from the right. At the bottom right of the form are two buttons: "Cancel" and "Save". The "Save" button is circled in red.

To Do List

1. From the Dashboard of Menu Options, click ToDo.

- This screen is a list of those clients that you have responsibilities for in an RU.



The dashboard menu for Objective Arts includes a 'ToDo' button with a red notification badge showing '317'. Other menu items are 'Change Password' and 'Logout'. Below the menu are three main icons: 'CANS' (CANS Assessments), 'Data Portal' (Input Data), and 'Reports' (Aggregate Reports).

To Do List

Incomplete 667	Desc	Due Date	Owner	OU
Returned 73	This CANS assessment for Kuhn, Freddie has been in the Assigned State for over 733 days. Please complete and submit the assessment as soon as possible.	October 14, 2013	Schuppe, Brisa	CCICMS
	This CANS assessment for Weimann, Troy has been in the Assigned State for over 705 days. Please complete and submit the assessment as soon as possible.	November 10, 2013	Little, Maximus	JCBHS - Healthy Homes
	This CANS assessment for Tremblay, Taylor has been in the Assigned State for over 703 days. Please complete and submit the assessment as soon as possible.	November 12, 2013	Thompson, Jammie	CCICMS
	This CANS assessment for Wisoky, Darlene has been in the Assigned State for over 705 days. Please complete and submit the assessment as soon as possible.	November 11, 2013	OKeefe, Eugene	JCBHS - Healthy Homes

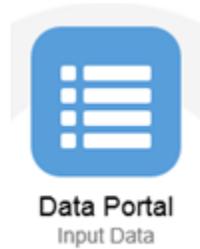
2. Click on a client description and the assessment will open.

- You will then be able to edit, submit or approve the assessment.

Data Portal

Client List

1. From the Dashboard of Menu Options, click Data Portal.



After clicking on Data Portal, you will see the following:

A screenshot of the Data Portal interface showing a table of clients. The table has three columns: Identifier ID, Name ID, and Date of birth ID. There are five rows of data, each with a checkbox in the first column. The table is titled "Clients List" and has a search bar and a "Show Filter" button above it. The navigation bar at the top includes "Home", "Clients", "Assessments", "Help", "Smith, Susie", and "Logout".

Identifier ID	Name ID	Date of birth ID
<input type="checkbox"/>	null, null	May 23, 2005
<input type="checkbox"/>	Last1000015, First1000015	November 12, 1996
<input type="checkbox"/>	Last1000260, First1000260	December 18, 1994
<input type="checkbox"/>	Last1001477, First1001477	May 11, 1994
<input type="checkbox"/>	Last1002098, First1002098	September 11, 1996

Depending on your browser settings, you may see a popup bar at the bottom of the screen that states, “Only secure content is displayed”. If you do, click “Show all content”.

Only secure content is displayed. [What's the risk?](#)



Show all content ×

The Data Portal Toolbar

A screenshot of the Data Portal toolbar, which is an orange horizontal bar. It contains the following elements from left to right: "Home", "Clients" with a dropdown arrow, "Assessments" with a dropdown arrow, "Help" with a question mark icon, "Smith, Susie" with a user icon, and "Logout" on the far right.

Home Clients Assessments Help Smith, Susie Logout

- ✓ **Home:** allows you to return to the Dashboard of Menu Options.
- ✓ **Clients:** this drop-down menu offers a choice between viewing a client list and viewing client workload.
- ✓ **Assessments:** this drop-down menu is the way to navigate to a list of client assessments or to view assessments in need of approval.
- ✓ **Help:** the help button will take you to the Objective Arts Wiki.
- ✓ **Logout:** after having entered the desired data, end the session by pressing this button on the top right of the screen. In addition, close your browser after your OA session.

Clients List and Organization

This screen is a list of those clients that you have responsibilities for in an RU. The list may be sorted by three categories: their unique Identifier (INSYST number or Medical Record Number), their name (last, first), and their date of birth.

Clients List			Start typing a last name	Show Filter	
Identifier ↑↓	Name ↓↑	Date of birth ↑↓			
<input type="checkbox"/>	null, null	May 23, 2005			
<input type="checkbox"/>	null, null	December 4, 1996			
<input type="checkbox"/>	1000015	Last1000015, First1000015	November 12, 1996		
<input type="checkbox"/>	1000260	Last1000260, First1000260	December 18, 1994		

1. To sort the information, click on the category (or arrow next to it) to arrange the set by:

- By default, the list is sorted by Identifier from lowest to highest (increasing sequential order)
- Identifier (from lowest to highest OR highest to lowest).
- Name (alphabetically A-Z or Z-A).
- Date of birth (oldest to youngest OR youngest to oldest).

2. To view information for a client, click on the row (the bars are colored faint green or white) where the client's information appears.

- This gives you information about the client's assessments, their ID numbers, dates, and status.

The Assessments List will appear:

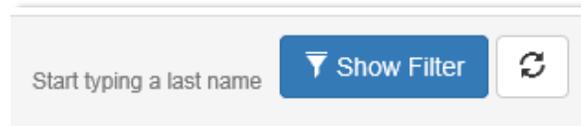
Assessments List for Last1000015, First1000015					Start typing a last name	Show Filter	
ID ↑↓	Instrument ↑↓	Client Name ↑↓	Date ↓↑	Status ↑↓			
<input type="checkbox"/>	86693	CANS	Last1000015, First1000015	November 14, 2014	Approved by WOLKENHAUER, DIANNE on 01/02/2015		
		Assessor: HARRIS, JENNIFER Reporting Unit: CCICMS (36811)					
<input type="checkbox"/>	81930	CANS	Last1000015, First1000015	October 30, 2014	Approved by Wilkinson, Lysane on 11/10/2014		
		Assessor: Johnson, Gregory Reporting Unit: EVC - CHRIS (36B71)					
<input type="checkbox"/>	74318	CANS	Last1000015, First1000015	September 3, 2014	Approved by Wilkinson, Lysane on 10/03/2014		
		Assessor: Johnson, Gregory Reporting Unit: EVC - CHRIS (36B71)					
<input type="checkbox"/>	77412	CANS	Last1000015, First1000015	July 22, 2014	Approved by WOLKENHAUER, DIANNE on 10/09/2014		
		Assessor: HARRIS, JENNIFER Reporting Unit: CCICMS (36811)					

You can sort this list by clicking on the arrows next to each column header. By default, this list is sorted by Date from most recent to oldest (e.g.: newest at the top). Also, you can filter this list if you know specific information about the client.

Clients

Filtering the Client List

1. Open your Client List.
2. Click the blue Show Filter button to the top right of the screen.

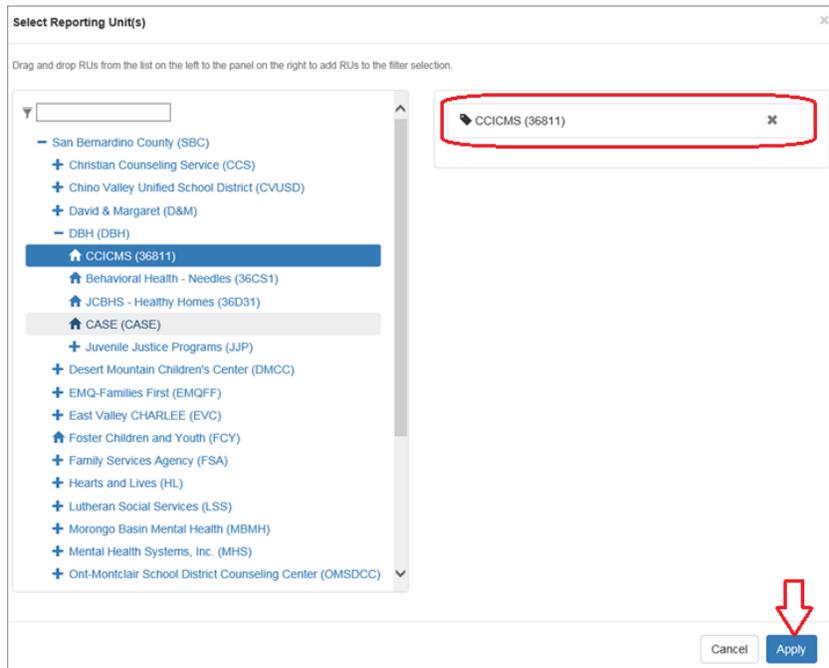


A filter section will open:

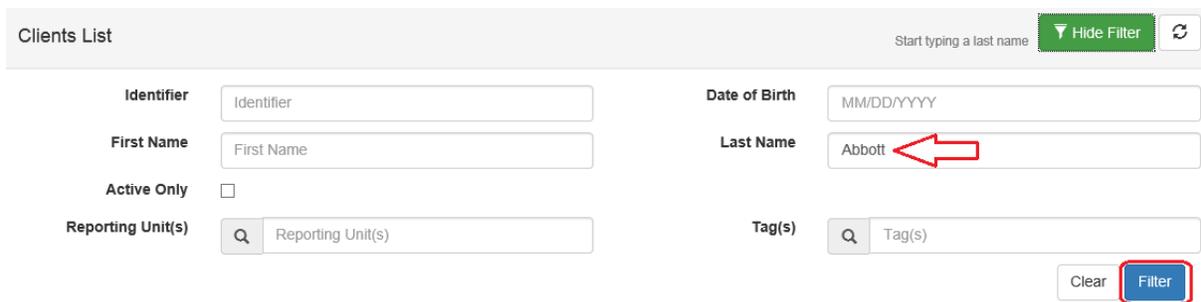
NOTE: It is NOT necessary to enter information in all of the search boxes. You may enter as much or as little information as you wish to narrow the fields.

- ✓ **Identifier:** this function is most useful if you know the Identifier of the client. (e.g. "0123456"). Partial Information may be used.
- ✓ **Date of Birth:** to locate client with a specific date of birth (e.g. "3/14/15)
- ✓ **First Name:** to locate clients with a given first name, (e.g. "Michael"). Partial information may be used.
- ✓ **Last Name:** to locate clients with a given last name, (e.g. "Abbott"). Partial information may be used.
- ✓ **Active Only:** If this box is enabled, the search will only return clients who are active. Otherwise, both active and inactive clients will be shown.
- ✓ **Reporting Unit:** to locate clients within one or a select few RUs. You will need to click the magnifying glass to input your parameters.
- ✓ **Tags:** to locate clients by a specific word or phrase in the report. (Not in use at this time. May be used in the future.)

3. To filter by RU, click on the magnifying glass to input your parameters.
 - You can search for an RU by name in the search box next to the filter icon; or you can make your selections by clicking on the plus icons.
4. Drag and drop RUs from the list on the left to the panel on the right.
5. Click the blue Apply button on the bottom right side of the screen once you have made your selections.

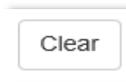


6. Once you're done entering parameters, click Filter, or press the Enter button on your keyboard.



There are several key points about the filter function:

- ✓ Once you enter criteria into the filter, the blue Show Filter section will turn green and will read Hide Filter. If you want to minimize the filter, you can now press the green Hide Filter button to deflate the search terms. Note that the button will still remain green, this indicates that some filter is being applied. Thus, you can always check whether a filter is operating based on the color of the filter button.
- ✓ To delete a filter or to filter according to different terms, just re-open the filter and change the parameters. Then, click the blue Filter button on the bottom right to apply the filter to your data.
- ✓ The Clear button (next to the filter button) removes all of the filters and reverts back to the default setting of having no filters applied.



- ✓ The refresh button on the upper right hand corner of the box allows you to check to see if any new data has appeared since your last search with similar parameters.



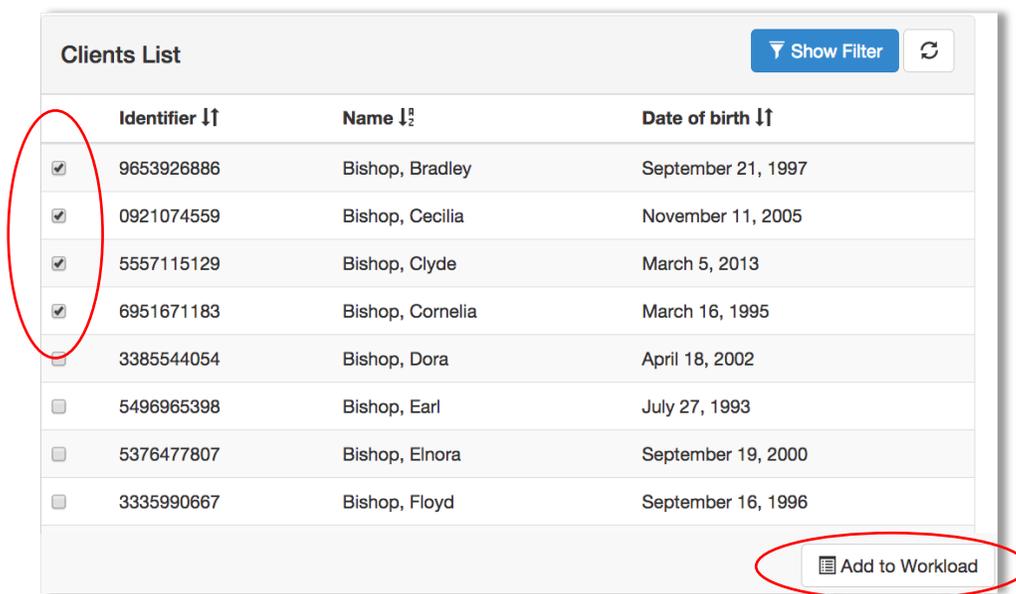
- ✓ **Additional note:** for the identifier, first name, and last name search boxes, your entries do not need to be complete words or ID numbers. You can run a search with, just the first three numbers in the ID ("012") or just the middle three letters of a last name ("bot") to yield all results that conform to those criteria.

Adding a Client to Workload

Your workload is automatically populated based on the Primary Therapist field within INSYST.

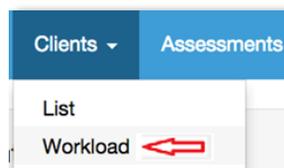
However, should you need to add a client to your workload:

1. **Navigate to the Client List.**
2. **On the Client List, check the box(es) next to the Identifier, then click the Add to Workload button at the bottom right of your screen.**



Clients List				Show Filter	Refresh
	Identifier ↑↓	Name ↓↑	Date of birth ↑↓		
<input checked="" type="checkbox"/>	9653926886	Bishop, Bradley	September 21, 1997		
<input checked="" type="checkbox"/>	0921074559	Bishop, Cecilia	November 11, 2005		
<input checked="" type="checkbox"/>	5557115129	Bishop, Clyde	March 5, 2013		
<input checked="" type="checkbox"/>	6951671183	Bishop, Cornelia	March 16, 1995		
<input type="checkbox"/>	3385544054	Bishop, Dora	April 18, 2002		
<input type="checkbox"/>	5496965398	Bishop, Earl	July 27, 1993		
<input type="checkbox"/>	5376477807	Bishop, Elnora	September 19, 2000		
<input type="checkbox"/>	3335990667	Bishop, Floyd	September 16, 1996		

3. **You can view the workload by clicking Clients and then Workload on the top menu.**

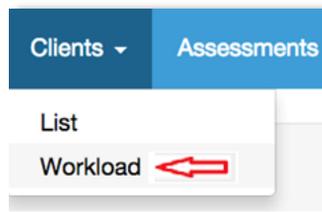


Clients List				Start typing a last name	Show Filter	Refresh
	Identifier ↑↓	Name ↓↑	Date of birth ↑↓			
<input type="checkbox"/>	40gLkA48	Abbott, Benjamin	March 18, 2004			
<input type="checkbox"/>	bXlpNdBy	Abbott, Blanca	September 14, 2011			
<input type="checkbox"/>	7xKadsk4	Abbott, Carey	October 28, 2005			

Removing a Client from Workload

When the INSYST case is closed, it will be automatically removed from your workload. However, should you need to manually remove a client from your workload:

1. **Navigate to the Client List.**
2. **On the toolbar at the top, click Clients.**
3. **Then click Workload.**



4. **Check the boxes next to the identifier of the client you are removing.**
5. **Click the red Remove from Workload button at the bottom right of your screen.**



Assessments

Adding an Assessment

1. **From the Dashboard, click Data Portal.**
2. **Filter for the client for whom you would like to create a new assessment.**
3. **Click on the client name, or filter for a client, to pull up their list of assessments.**
 - You will see a screen like the one shown below, featuring that client's list of assessments, sorted by ID number, the instrument, name, date, and status.

- You can organize the list and sort by clicking on the category name or the set of up and down arrows next to each of the categories.

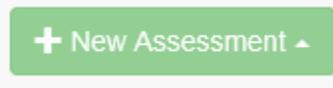
Assessments List for Last1234, First1234

ID	Instrument	Client Name	Date	Status
95205	CANS Assessor: Smith, Susie Reporting Unit: CCICMS (36811)	Last1234, First1234	April 9, 2015	Assigned
95203	CANS Assessor: Smith, Susie Reporting Unit: CCICMS (36811)	Last1234, First1234	April 7, 2015	Assigned
95178	CANS Assessor: Smith, Susie Reporting Unit: CCICMS (36811)	Last1234, First1234	March 16, 2015	Approved by Smith, Susie on 04/07/2015
95185	CANS Assessor: Krahl, Karen Reporting Unit: CCICMS (36811)	Last1234, First1234	March 16, 2015	Submitted
95179	CANS Assessor: Smith, Susie Reporting Unit: CCICMS (36811)	Last1234, First1234	March 10, 2015	Submitted
95170	CANS Assessor: Krahl, Karen Reporting Unit: CCICMS (36811)	Last1234, First1234	March 9, 2015	Approved by Krahl, Karen on 03/16/2015

Reports - + New Assessment Delete

4. Once on the assessments list, click the green New Assessment tab on the bottom right of the screen.

- This button will be grayed out if the client is inactive in your RU; or the staff member does not have a placement or responsibility in the RU.



5. You will be given several different assessment options; these options are specifically designed based on criteria such as the client's age or demographic information.

- All available assessment types will display, choose the assessment that best fits your needs.
- Most users will select CANS.

- ACE
- ASQ
- BRIEF-P
- CANS
- DAYC-2
- ECBI
- PDMS-2
- PSI-SF
- SPM-P
- TSCYC

+ New Assessment

Once you choose the assessment type, you will continue to the main New Assessment screen. Key information about the client will display. This includes the client's ID number, name, date of birth, and gender.

Home Clients Assessments Help Smith, Susie Logout

CANS (NEW) - Last1234, First1234

Client ID: 1234 Date of Birth: April 17, 1999
Client Name: Last1234, First1234 Client Gender: FEMALE
Assessment ID: Assessment Date: 03/23/2015
Assessor: Smith, Susie Assessment Status:
Org Unit: CCICMS (36811)
Tags: none

← Fire Setting Module Assessment Information →
Shortcut: "alt+left arrow" or swipe left Shortcut: "alt+right arrow" or swipe right

OFF Add caregiver section Pre-populate Cancel Save

Assessment Data Entry

All fields marked with an asterisk are mandatory and must be completed.

1. To navigate through the assessment, click on the blue routing buttons with white arrows in the direction you wish to go.
 - Instead of clicking on the button, you can navigate left or right by simultaneously holding down the alt and right/left arrow key on the keyboard.
2. You can use the Pre-populate feature by clicking the Pre-populate button on the bottom toolbar of your screen.
 - This will populate the new assessment with the information from the last approved assessment.

CANS (NEW) - Last1234, First1234

Client ID: 1234 Date of Birth: April 17, 1999
Client Name: Last1234, First1234 Client Gender: FEMALE
Assessment ID: Assessment Date: 04/13/2015
Assessor: Krahl, Karen Assessment Status:
Org Unit: CCICMS (36811)
Tags: none

← Fire Setting Module Assessment Information →
Shortcut: "alt+left arrow" or swipe left Shortcut: "alt+right arrow" or swipe right

OFF Add caregiver section Pre-populate Cancel Save

3. You have the option to toggle Quick data entry mode in the bottom left of the screen:



CANS (NEW) - Last1236, First1236

Client ID:	1236	Date of Birth:	July 1, 2000
Client Name:	Last1236, First1236	Client Gender:	FEMALE
Assessment ID:		Assessment Date:	04/13/2015
Assessor:		Assessment Status:	
Org Unit:	JCBHS - Healthy Homes (36D31)		
Tags:	none		

▼ Assessment Information

Reason for assessment: *		Add Note
If reason for assessment is "Major Life Event", please specify:		Add Note

▼ Caregiver Section(s)

1. Caregiver section(s) does not apply at this time	<input type="checkbox"/>	Add Note
---	--------------------------	--------------------------

▼ Life Domain Functioning

2. Family *		Add Note
3. Living Situation *		Add Note
4. Social Functioning *		Add Note
5. Recreational *		Add Note
6. Developmental *		Add Note

- If you choose to utilize Quick data entry mode, a screen will appear where each field can be seen on the same page.

4. It can be turned off by clicking the same button, which will now look like this:



- The Quick data entry mode will not be covered in any further detail in this document.

5. To add an assessment (not in Quick data entry mode), click the Assessment Information button.

CANS (NEW) - Last1236, First1236

Client ID: 1236 Date of Birth: July 1, 2000
Client Name: Last1236, First1236 Client Gender: FEMALE
Assessment ID: Assessment Date: 04/13/2015
Assessor: Krahl, Karen Assessment Status:
Org Unit: JCBHS - Healthy Homes (36D31)
Tags: none

< Fire Setting Module Assessment Information >

Shortcut: "alt+left arrow" or swipe left Shortcut: "alt+right arrow" or swipe right

6. Enter a Reason for assessment.

CANS (NEW) - Last1234, First1234

Assessment Information

Reason for assessment: * Add Note

If reason for assessment is "Major Life Event", please specify: Add Note

Initial
Update
Planned Discharge
Unplanned Discharge

< General Information Caregiver Section(s) >

The next section will ask if the Caregiver Section(s) applies at this time.

7. **CHECK the box if you WILL NOT be adding a caregiver.**

- If you do NOT check this box, a caregiver section WILL be required.

1. Caregiver section(s) does not apply at this time

8. You can add a caregiver at any time by clicking the "Add caregiver section" button along the bottom toolbar.

☰ OFF Add caregiver section Cancel Save

- A box displaying the current caregivers, if any, will be shown.

Select caregiver

First Name	Last Name	Relationship
John	Doe	Adoptive Father



9. Press the Edit button to the bottom right to add a new caregiver.

Select caregiver

First Name	Last Name	Relationship
John	Doe	Adoptive Father



10. You can either change the current listing(s), or you can add another caregiver by selecting the **Add New** option.

- If you select Add New, a new row will appear, allowing you to enter the First Name, Last Name, and Relationship to the client for that caregiver (as shown below).

Select caregiver

First Name	Last Name	Relationship
John	Doe	Adoptive Father
NEW	CAREGIVER	Adoptive Mother



11. To finish adding each caregiver you will need to click the **Save** button before you can add another caregiver.

- You can add as many caregivers as you like by repeating this process.

12. To exit the caregiver screen, click out of the caregiver box.

13. Click the blue button pointing to the right for Life Domain Functioning or alt + right arrow.

CANS (NEW) - Last1236, First1236

Caregiver Section(s)

1. Caregiver section(s) does not apply at this time [Add Note](#)

[Assessment Information](#) [Life Domain Functioning](#)

You will see:

CANS (NEW) - Last2037948, First2037948

Life Domain Functioning

2. Family *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note
3. Living Situation *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note
4. Social Functioning *	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note

You have two options for entering the data:

- ✓ You can enter numbers 0,1,2,3 in the empty boxes from your keyboard. Press the tab key on your keyboard to move on to the next box to be filled.
- ✓ You can select one of the bubbles from the existing options of 0,1,2,3 for each category with the click of your mouse.
- ✓ Whichever option you choose, you will notice that your responses will automatically generate color-coding dependent on score.

Your end result for each section will look like the sample below.

CANS (NEW) - Last1234, First1234

Life Domain Functioning

2. Family *	1	<input type="radio"/> 0 <input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note
3. Living Situation *	2	<input type="radio"/> 0 <input type="radio"/> 1 <input checked="" type="radio"/> 2 <input type="radio"/> 3	Add Note
4. Social Functioning *	3	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input checked="" type="radio"/> 3	Add Note
5. Recreational *	1	<input type="radio"/> 0 <input checked="" type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note

14. Continue on to other sections by pressing the blue buttons (or again, the alt+right/left arrows) directing you to additional categories until you reach the home screen.

- You have now completed the data entry.

15. If at any time, you would like to add a note, click the Add Note button.

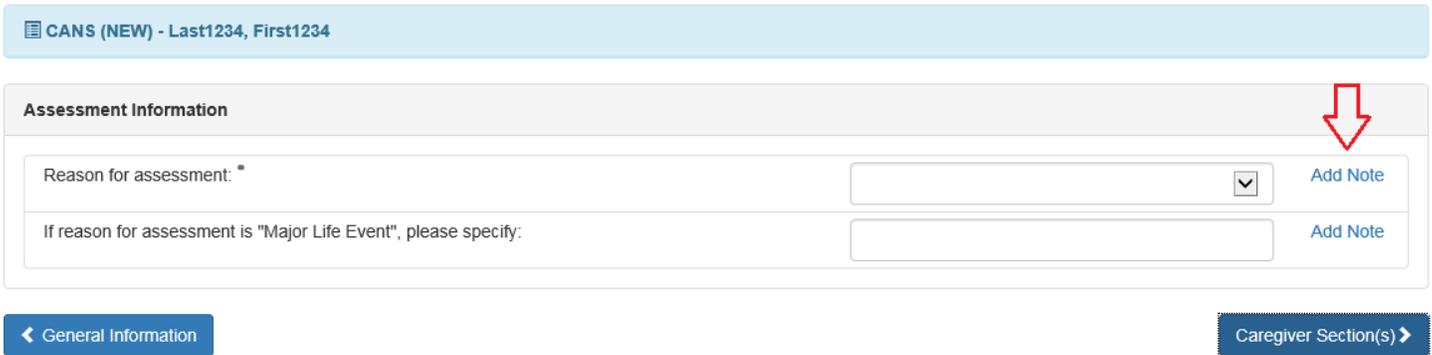
CANS (NEW) - Last1234, First1234

Assessment Information

Reason for assessment: *

If reason for assessment is "Major Life Event", please specify:

< General Information Caregiver Section(s) >



16. A text box will open, enter your note.

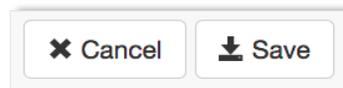
Note for Reason for assessment: x



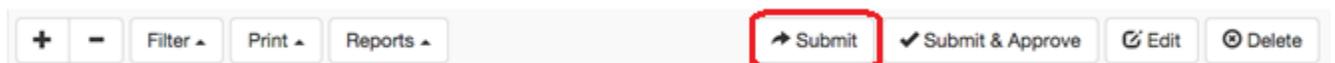
17. Click Apply.

18. While entering an assessment, make sure to press the Save button periodically as you complete parts of the assessment so that you don't lose any of your data. You will have to click Edit on the lower toolbar to continue.

- While you do not have to do this every time you change panels, it is recommended that you do so occasionally. If you do not wish to save the changes, press Cancel, which if you have not saved, will completely exit the assessment.



19. Once you have saved the assessment, and are completely finished, click Submit to send the assessment to your supervisor for approval.



Validation Errors

1. When you submit an assessment you may receive a validation error dialogue box.

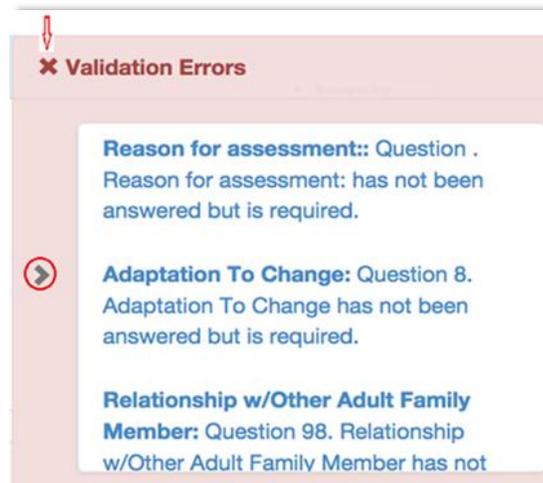
- This is a fairly common occurrence, and is specifically designed to ensure that all parts of the assessment have been completed before submission.
- The box, entitled Validation Errors, will list all of the errors on the CANS that need to be addressed.

2. Click on each of the Validation Errors in the box to fix the issues, or navigate through the assessment and complete the question(s) that appear in red.

- The corrections will not eliminate the error message until you re-submit the assessment.
- At that time, another error message may pop up if there are still issues.

School Module			
101. Attention - Concentration in School	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note
102. Sensory Integration Difficulties in School	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note
103. Affect Dysregulation in School	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note
104. Anxiety in School	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note
105. Depression in School	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note
106. Peer Relations in School	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note
107. Oppositional in School	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note
108. Conduct in School	<input type="text"/>	<input type="radio"/> 0 <input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3	Add Note

3. You can click the red X next to the title or the arrow on the left side (pointing to the right) if you do not wish to see the errors.

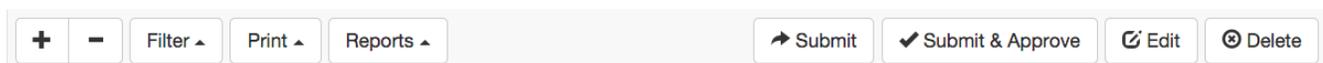


The image shows a 'Validation Errors' dialog box with a red 'X' icon and a title bar. It contains three error messages:

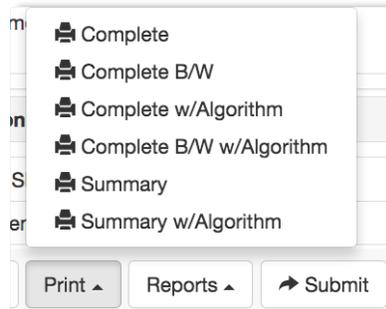
- Reason for assessment:** Question . Reason for assessment: has not been answered but is required.
- Adaptation To Change:** Question 8. Adaptation To Change has not been answered but is required.
- Relationship w/Other Adult Family Member:** Question 98. Relationship w/Other Adult Family Member has not

Assessment Toolbar

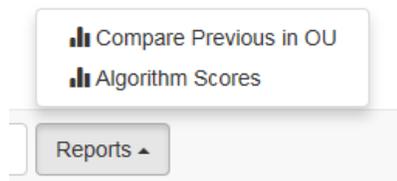
Once you open an existing assessment, or after a new assessment has been saved for the first time, you will see a toolbar along the bottom. The options (buttons) shown below vary depending on your Objective Arts role.



- ✓ **+/- Icons:** the plus/minus icon on the far left of the bar allows you to expand/collapse all of the categories in the assessment. Pressing the plus will show each individual component, whereas the minus will only show the major headings.
- ✓ **Filter:** allows you to filter by assessment scores. For example, you can filter to see assessment scores of "2s & 3s" or for "3s only".
- ✓ **Print:** The print options (shown below) allow you to print the assessment in various forms. You can print a complete version that is color-coded, or a complete version in black and white. Alternatively, you can elect to print just a summary, which shortens the report to only give an overview of main categories/domain items as opposed to each individual sub-category and number value. While Algorithms Scores are not available, the print options with algorithms will not work.



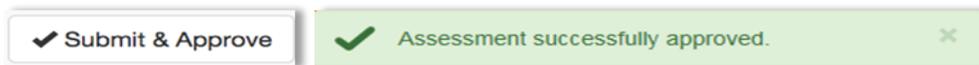
- ✓ **Reports:** You can also generate 2 different kinds of reports based on the assessment data. NOTE: each of these reports will open in either a new tab or window based on your browser settings. While Algorithms Scores are not available, the report options with algorithms will not work.



- ✓ **Submit:** The Submit option allows you to complete the assessment and then submit it for further review. If successful, you will see a confirmation that says that the assessment was successfully submitted. If not, you may receive validation errors.

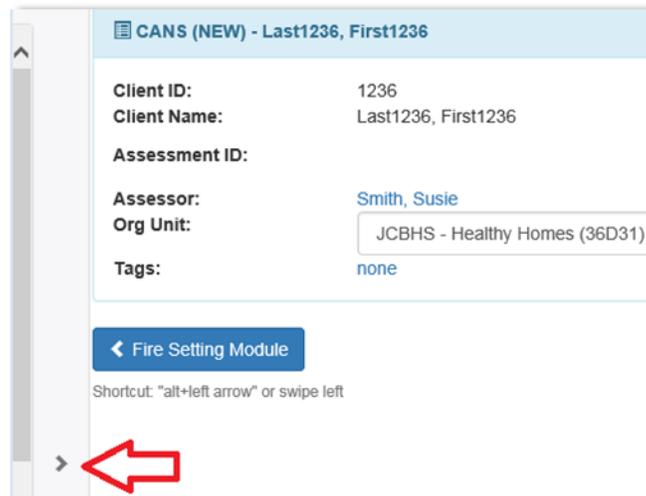


- ✓ **Submit and Approve:** The Submit and Approve option allows a supervisor to submit the assessment and then immediately approve it in one click. If successful, you will see a confirmation that says that the assessment was successfully submitted. If unsuccessful, you may receive validation errors.



- ✓ **Edit:** the Edit option allows you to change information in the assessment.
- ✓ **Delete:** the Delete option allows you to click on any assessment and delete it from the system.

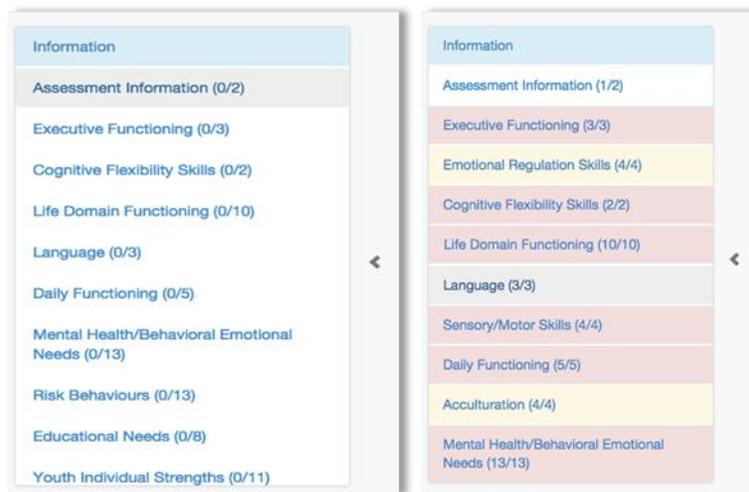
To the left side of the screen you will see a bar with an arrow.



1. This arrow can be clicked to expand a panel.

- The purpose of this side panel is to give you a summary level view (which is color-coded).

This example is what the side panel might look like before you begin, with each category showing that 0 out of X questions have been answered.



This example is more indicative of what the panel will look like once you have entered all of your data.

Accessing an Assessment

1. From the Client List on the Menu Bar, select the client.

- Remember you can sort and/or filter the client results to help you find a specific client.

2. Once you find the client you are looking for, click on the row (the bars colored faint green or white) where the client's information appears.

Once you select a client, you will see:

ID	Name	Date	Status
203748	CVMS	4/18/2014	Completed
40320	CVMS	4/18/2014	Completed
80320	CVMS	4/18/2014	Completed
80808	CVMS	4/18/2014	Completed
95445	CVMS	4/18/2014	Completed
10320	CVMS	4/18/2014	Completed
11415	CVMS	4/18/2014	Completed
14248	CVMS	4/18/2014	Completed
80320	CVMS	4/18/2014	Completed
80320	CVMS	4/18/2014	Completed

You can sort and/or filter this list to make it easier to find the specific assessment that you are looking for by clicking on the categories.

3. Once you find the assessment you are looking for, click on the row (the bars are colored faint green or white) where the assessment information appears.

After selecting an assessment, you will see:

CANS - Last2037948, First2037948

Client ID: 2037948	Date of Birth: January 19, 2004
Client Name: Last2037948, First2037948	Client Gender: MALE
Assessment ID: 52110	Assessment Date: April 18, 2014
Assessor: HAYES, SARAH	Assessment Status: Approved by WOLKENHAUER, DIANNE on 06/14/2014
Org Unit: CCICMS (36811)	
Tags: San Bernardino (EC36), Hispanic Origin (N) (HON), English (LANA), ETHA (ETHA), White (White)	

Assessment Information

Reason for assessment: Update

If reason for assessment is "Major Life Event", please specify:

Caregiver Section(s)

1. Caregiver section(s) does not apply at this time

Life Domain Functioning

2. Family	2
3. Living Situation	2
4. Social Functioning	2
5. Recreational	1
6. Developmental	0
7. Job Functioning	NA
8. Legal	0
9. Medical	1
10. Physical	1
11. Sexuality	0
12. Sleep	1
13. School Behavior	2
14. School Achievement	1
15. School Attendance	0

Child/Youth Strengths

+ - Filter - Print - Reports - Edit

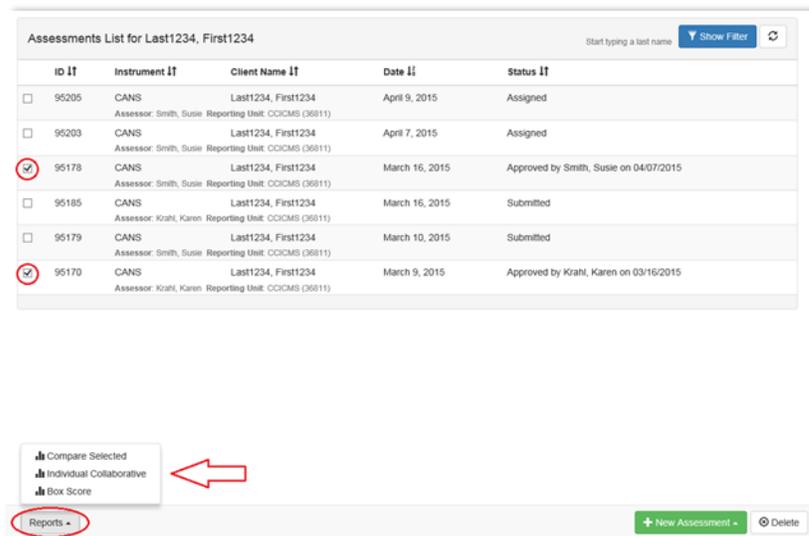
From this screen, you can review, edit, submit the assessment, or access any of the other functions on the toolbar along the bottom of your screen.

Creating Individual Assessment Reports

1. From the Client List, open the Assessments List for the client (as noted above).

2. Select the Assessments you would like to report on by clicking the checkbox to the left of each row.

- Note that multiple are selected below since a Compare Selected report is desired.



3. Click the Reports button on the bottom left of your screen to reveal a menu of report choices.

- ✓ **Compare Selected:** This report shows a side by side comparison of the selected assessments to show how the child has changed in each category across the time period of the reports.
- ✓ **Individual Collaborative:** This is a comparison report that presents information that can be discussed between clinicians and parents regarding a child's change in several major categories.
- ✓ **Box Score:** This report shows a composite weighted and actionable item score comparison, and specific actionable items.

4. Click the name or graph icon for the desired report.

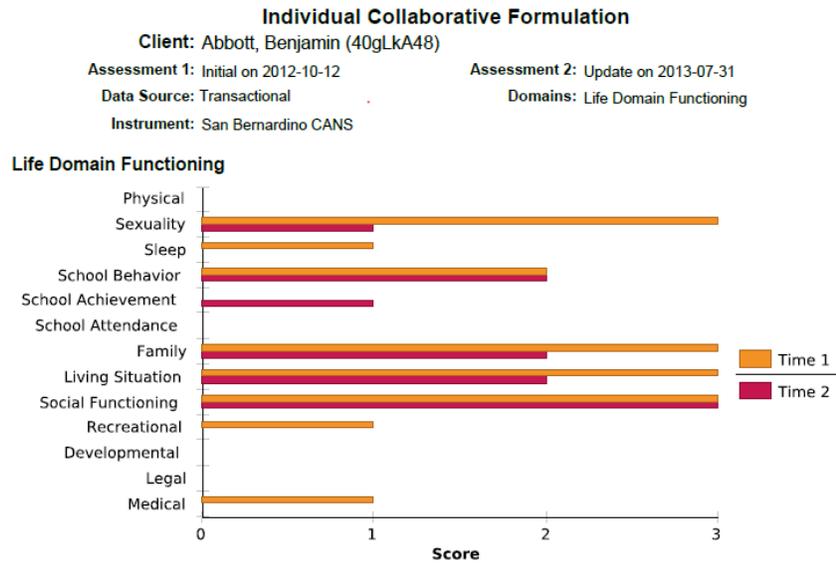
- Your report will open in a new tab or window, depending on your browser settings

Sample Reports

This Compare Selected report compares the chosen assessments and sets up a side by side comparison.

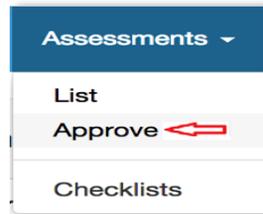
Abbott, Benjamin				
Client ID: 897				
Date of Birth: 03/18/2004				
#	Question	Approved Stoltenberg, Shakira 10-12-2012 1.0	Approved Little, Maximus 05-16-2013 1.0	Approved Gibson, Emanuel 07-31-2013 1.0
Assessment Information				
Reason for assessment:		Initial	Initial	Update
If reason for assessment is "Major Life Event", please specify:				
Caregiver Section(s)				
1	Caregiver section(s) does not apply at this time		Yes	
Life Domain Functioning				
2	Family	3	3	2
3	Living Situation	3	0	2
4	Social Functioning	3	2	3
5	Recreational	1	0	0
6	Developmental	0	2	0

The Individual Collaborative report graphically represents changes in a child's responses to various chosen categories (in this case, Life Domain Functioning)



Assessment Approval

1. From the Client List, click the Assessments option from the Menu Bar and select Approve from the drop-down menu.



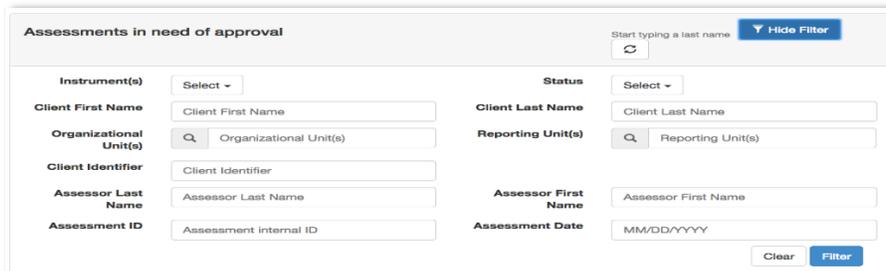
You will see the assessments that are in a submitted status. This list is sortable by ID number, instrument, client name, date, or status of assessment.

2. You can refresh the list periodically (by clicking near the upper right) to see if any other assessments have arrived for approval.

ID	Instrument	Client Name	Date	Status
<input type="checkbox"/> 57993	CANS	Last2089949, First2089949 Assessor: RILEY, ERIKA Reporting Unit: DMCC - SATS-AV (36CGE)	September 12, 2011	Submitted
<input type="checkbox"/> 70152	CANS	Last2061191, First2061191 Assessor: DUNCAN, KRYSTAL Reporting Unit: DMCC - SATS-AV (36CGE)	March 5, 2012	Submitted
<input type="checkbox"/> 92980	CANS	Last2024079, First2024079 Assessor: BABB, CHERYL Reporting Unit: DMCC - SATS-AV (36CGE)	March 16, 2012	Submitted
<input type="checkbox"/> 57309	CANS	Last2036546, First2036546 Assessor: CALDERON, NANCY Reporting Unit: DMCC - SATS-AV (36CGE)	March 16, 2012	Submitted
<input type="checkbox"/> 53569	CANS	Last1015340, First1015340 Assessor: CARTER, JASMINE Reporting Unit: DMCC - SATS-AV (36CGE)	March 22, 2012	Submitted
<input type="checkbox"/> 61134	CANS	Last2017598, First2017598 Assessor: MCKELLAR, JEANNE Reporting Unit: DMCC - SATS-AV (36CGE)	March 23, 2012	Submitted

Assessment Approval Filter

You can search for the assessments to be approved based on client or assessor information by using the Show Filter button. The Instrument and Status fields offer drop down menus for further refinement.



You have two options for the approval process, both of which are similar but offer slightly different views of the process. Both can be accessed via the toolbar at the bottom of your screen.



Sequential Approve

1. Click the **Sequential Approve** button at the lower right of the screen to access **Assessments in need of approval**.
 - You can approve or reject each candidate on a rolling basis. Once you click either approve or reject for any candidate, the next candidate's assessment will appear for your review.



You will see each client's assessment open, as shown below.



Batch Approve

1. Click the Batch Approve button at the lower right of the screen to access Assessments in need of approval.

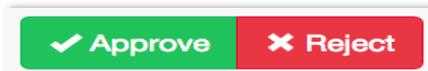


- The assessments will show up based on client.
- To the left of your screen, you will see a panel of the assessments that need approval.
- The right of the screen will display the first CANS score sheet that needs approval.
- You will be able to approve or reject the assessment and move on to the next one.

Assessments			CHECK ONE:	
ID	Client Name	Date	Initial CANS	Update CANS
55532	Last1089218, First1089218	2013-01-31	<input type="radio"/>	<input checked="" type="radio"/>
53998	Last2028366, First2028366	2013-03-14	<input type="radio"/>	<input type="radio"/>
7243	Last2060666, First2060666	2013-03-18	<input type="radio"/>	<input type="radio"/>
6444	Last2082662, First2082662	2013-06-05	<input type="radio"/>	<input type="radio"/>
47766	Last2059710, First2059710	2013-07-17	<input type="radio"/>	<input type="radio"/>
44869	Last2030156, First2030156	2013-07-19	<input type="radio"/>	<input type="radio"/>

CHILD AND ADOLESCENT NEEDS AND STRENGTHS (CANS) SAN BERNARDINO	
Date Assessed: 01/31/2013	Assessment Status: Submitted
Date of Birth: 10/26/2004	Age: 10
Assessor's Name: MATTHEWS, SARAH	Signature:
LIFE DOMAIN FUNCTIONING 0 = no evidence of problems 1 = history, mild 2 = moderate 3 = severe	
Family *	1 ○ ○ ○ ○ ○
Living Situation	1 ○ ○ ○ ○ ○
Social Functioning	○ ○ ○ ○ ○
Recreational	○ ○ ○ ○ ○
Developmental *	1 ○ ○ ○ ○ ○
Job Functioning	○ ○ ○ ○ ○
Legal	○ ○ ○ ○ ○
Medical	○ ○ ○ ○ ○
Physical	○ ○ ○ ○ ○
Sexuality *	○ ○ ○ ○ ○
Sleep	○ ○ ○ ○ ○
School Behavior *	1 ○ ○ ○ ○ ○
School Achievement *	1 ○ ○ ○ ○ ○
School Attendance *	○ ○ ○ ○ ○
CHILD/YOUTH STRENGTHS 0 = centerpiece 1 = useful 2 = identified 3 = not yet identified	
Family	0 ○ ○ ○ ○ ○
Interpersonal	○ ○ ○ ○ ○
Optimism	○ ○ ○ ○ ○
Educational	3 ○ ○ ○ ○ ○
Vocational	○ ○ ○ ○ ○
CAREGIVER STRENGTHS & NEEDS Caregiver Assessment(s) Present: <input type="checkbox"/> Present <input checked="" type="checkbox"/> NO	
CHILD BEHAVIORAL/EMOTIONAL NEEDS 0 = no evidence of problem 1 = hx or sub-threshold 2 = signif. meets dx 3 = severe/dangerous	
Psychosis	○ ○ ○ ○ ○
Impulsivity/Hyperactivity	○ ○ ○ ○ ○
Depression	0 ○ ○ ○ ○ ○
Anxiety	0 ○ ○ ○ ○ ○
Oppositional	2 ○ ○ ○ ○ ○
Conduct	○ ○ ○ ○ ○
Adjustment to Trauma *	○ ○ ○ ○ ○
Anger Control	2 ○ ○ ○ ○ ○
Eating Disturbances	○ ○ ○ ○ ○
Affect Dysregulation	1 ○ ○ ○ ○ ○
Behavioral Regressions	○ ○ ○ ○ ○
Somatization	○ ○ ○ ○ ○
Substance Use *	○ ○ ○ ○ ○
CHILD RISK BEHAVIORS 0 = no evidence of problem 1 = Hx - Watch/Prevent 2 = recent - ACT 3 = acute - ACT IMMED	
Suicide Risk	○ ○ ○ ○ ○
Self-Mutilation	○ ○ ○ ○ ○
Other Self Harm	1 ○ ○ ○ ○ ○
Danger to Others *	○ ○ ○ ○ ○

2. For both processes, you will be able to click the button (shown below) to either approve or reject the given assessment.



After you approve the assessment, you will see a green confirmation box near the top right that says "Assessment successfully approved".



If you choose to reject the assessment, you will receive a pop-up box to make a note stating why you are rejecting the assessment.

Reject Assessment Note



Reject

3. Once you have entered your reason, click reject to confirm the rejection, or click the “x” in the top right to cancel.

Once you click reject, you will see a green confirmation box near the top right that says “Assessment successfully rejected”.



Accessing a Specific Assessment

1. From the Client List, select the client.

- Remember you can sort and/or filter the client results to help you find the specific client.

2. Once you find the client you are looking for, click on the row (the bars colored faint green or white) where the client's information appears.

- Once you select a client, you will see:

Client ID	Client Name	Assessment Status
05493	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05504	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05506	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05508	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05445	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
30701	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05473	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05474	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05475	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05476	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05477	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05478	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05479	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014
05480	СВИС	Убрана от МОСКВИНАУЧЕРЪ ДИВИОН ОН 02445014

- You can sort and/or filter this list to make it easier to find the specific assessment.

3. Once you find the assessment, click on the row (the bars are colored faint green or white) and the assessment appears.

CANS - Last2037948, First2037948

Client ID:	2037948	Date of Birth:	January 19, 2004
Client Name:	Last2037948, First2037948	Client Gender:	MALE
Assessment ID:	52110	Assessment Date:	April 18, 2014
Assessor:	HAYES, SARAH	Assessment Status:	Approved by WOLKENHAUER, DIANNE on 06/14/2014
Org Unit:	CCICMS (36811)		
Tags:	San Bernardino (EC36), Hispanic Origin (N) (HON), English (LANA), ETHA (ETHA), White (White)		

Assessment Information

Reason for assessment: [Update](#)

If reason for assessment is "Major Life Event", please specify:

Caregiver Section(s)

1. Caregiver section(s) does not apply at this time

Life Domain Functioning

2. Family	2
3. Living Situation	2
4. Social Functioning	2
5. Recreational	1
6. Developmental	0
7. Job Functioning	NA
8. Legal	0
9. Medical	1
10. Physical	1
11. Sexuality	0
12. Sleep	1
13. School Behavior	2
14. School Achievement	1
15. School Attendance	0

Child/Youth Strengths

+ - Filter Print Reports Edit

If an assessment has been approved, the header bar will be green. An assessment in an assigned or submitted status will remain blue.

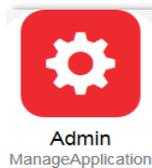
CANS - Last1234, First1234

Client ID:	1234	Date of Birth:	April 17, 1999
Client Name:	Last1234, First1234	Client Gender:	FEMALE
Assessment ID:	95178	Assessment Date:	March 16, 2015
Assessor:	Smith, Susie	Assessment Status:	Approved by Smith, Susie on 04/07/2015
Org Unit:	CCICMS (36811)		
Tags:	none		

You can review the assessment, make any necessary changes, submit the assessment, or access any of the other functions on the toolbar along the bottom of your screen.

Administration

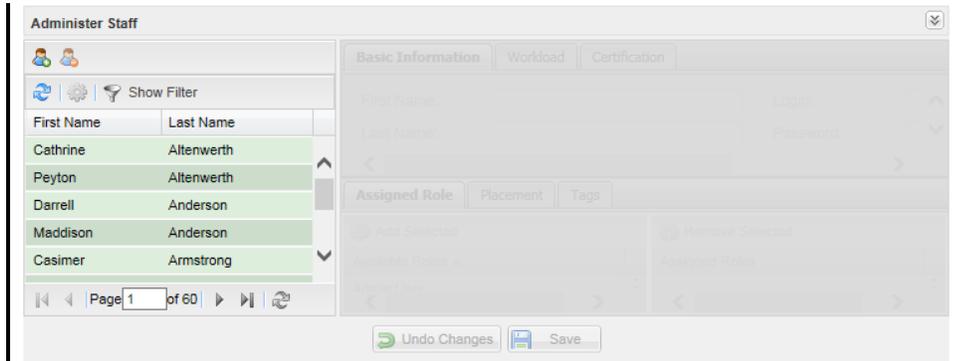
1. From the Dashboard of Menu Options, click the Admin box to begin managing Administration tasks.



Depending on your browser settings, you may also see Only secure content is displayed along the bottom. If you do, click Show all content.

You will see the following.

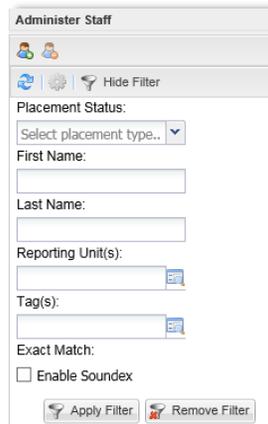
This is referred to as the **Administrator Staff Screen**.



Filtering the Staff List

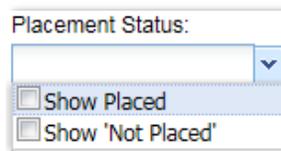
1. **Click the Show Filter button on the left-hand side of the screen.**
 - With no filters selected, the list will default to showing all placed staff sorted by Last Name.

A filter section will open:



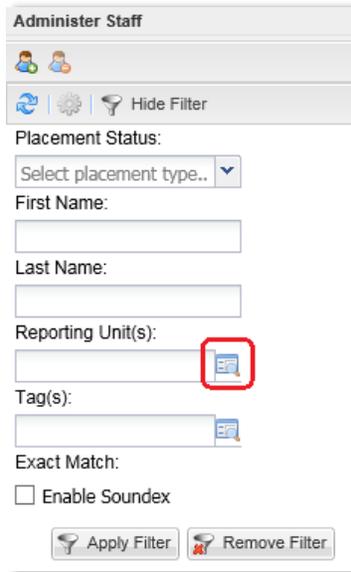
Placement Status has two options to sort by.

2. **If you only want to see the staff that has a placement check Show Placed.**
3. **If you only want to see staff that is not placed, check Show 'Not Placed'.**
4. **If you want to show all Staff, whether placed or not, click both boxes.**



- ✓ **First Name:** allows you to filter by first name of the staff member.
 - ✓ **Last Name:** allows you to filter by last name of the staff member.
 - ✓ **Reporting Units:** allows you to filter by a specific (or multiple) reporting unit.
 - ✓ **Tags:** allows you to filter by specific tags that have been assigned to the staff member. (Not active at this time.)
- ✓ NOTE: It is NOT necessary to enter information in all of the search boxes. Your selections narrow the data set to one that is more appropriate for your current needs. You may enter as much or as little information as you wish to narrow the fields.

5. For the Reporting Unit filter, you will need to click the magnifying glass to the right of the filter.



6. From here, you can type the RU that you are looking for in the blank field, or find it manually by expanding the arrows and clicking the appropriate check box(es).



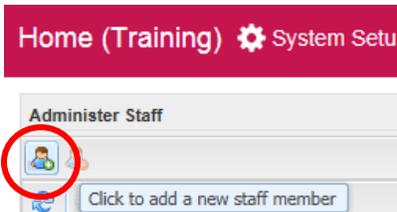
- 7. Click OK to return to the Filter.
- 8. Apply Filter or press Enter on your keyboard.

The filter will then return your results.

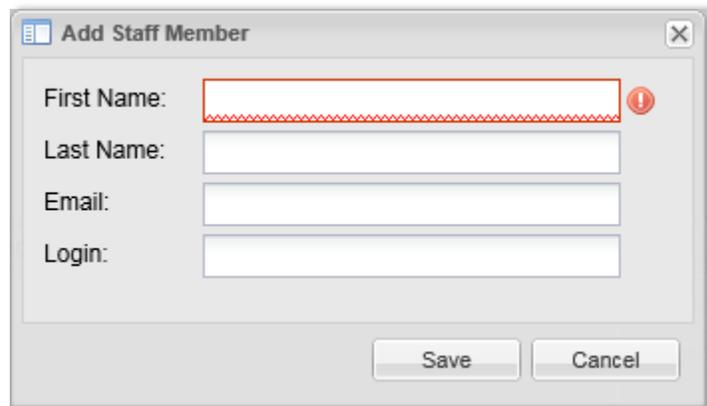
Administer Staff	
	
   Show Filter	
First Name	Last Name
Arvid	Jones

Adding a New Staff Member

1. Access the Administer Staff Screen. Click the Add a New Staff Member Button near the top left.



- A box will open to enter the staff member's information.
- Enter the staff member's profile information, all fields are required.
- Their Login will be the staff members INSYST number.
- Click Save.

A screenshot of a dialog box titled 'Add Staff Member'. It contains four input fields: 'First Name:', 'Last Name:', 'Email:', and 'Login:'. The 'First Name' field is highlighted with a red border and a red exclamation mark icon to its right. At the bottom of the dialog box, there are two buttons: 'Save' and 'Cancel'.

2. Filter for the new staff entry.
3. Double click on the new staff entry to pull up the staff profile.

4. Assign a password and confirm the password in the Again box.
 - Passwords require at least six characters and one uppercase letter.

Basic Information | Workload | Certification

First Name: David
 Last Name: Fogg
 Email: dfogg@dbh.wbcounty.gov
 Gender: Male Female
 Job Title:

Login: 5555555555
 Password:
 Again:
 Status: Active
 Cell Phone Number:

! Password must be more than 6 characters long.
 Password must have at least 1 uppercase letter.

5. Activate the Staff member by checking the Active box.

Basic Information | Workload | Certification

First Name: John
 Last Name: Doe
 Email: JDoe@dbh.sbcounty.gov
 Gender: Male Female
 Job Title:

Login: SIMON NUMBER
 Password:
 Again:
 Status: Active

Assign a Role

Assign the Staff member a Role by finding the box titled Assigned Roles at the bottom of the screen under the Assigned Role tab. You can't assign someone to a role which is equal to or above your own. You will only assign one role per staff member.

1. Click on the appropriate role for this person in the Available Roles pane.

Assigned Role | Placement | Tags

Add Selected | Remove Selected

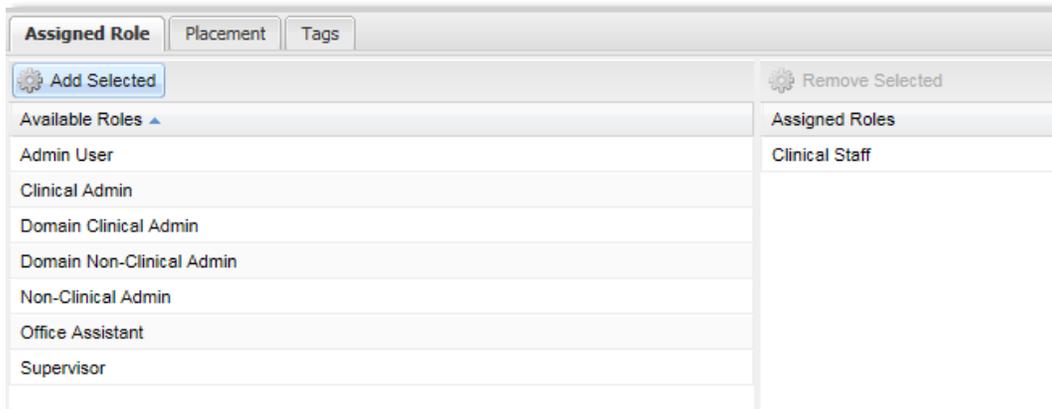
Available Roles

- Admin User
- Clinical Admin
- Clinical Staff
- Domain Clinical Admin
- Domain Non-Clinical Admin
- Non-Clinical Admin
- Office Assistant
- Supervisor

Assigned Roles

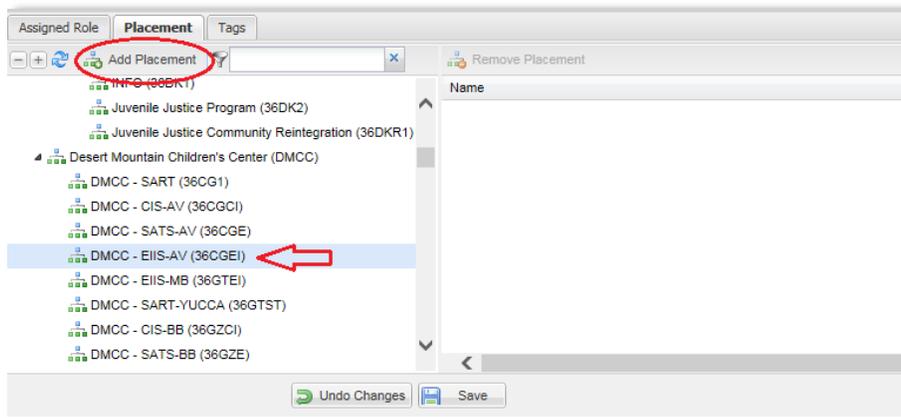
Undo Changes | Save

2. Click on **Add Selected**. The role will appear in the **Assigned Roles** pane.
3. To remove a role, click on the item in the right pane and then click on **Remove Selected**.

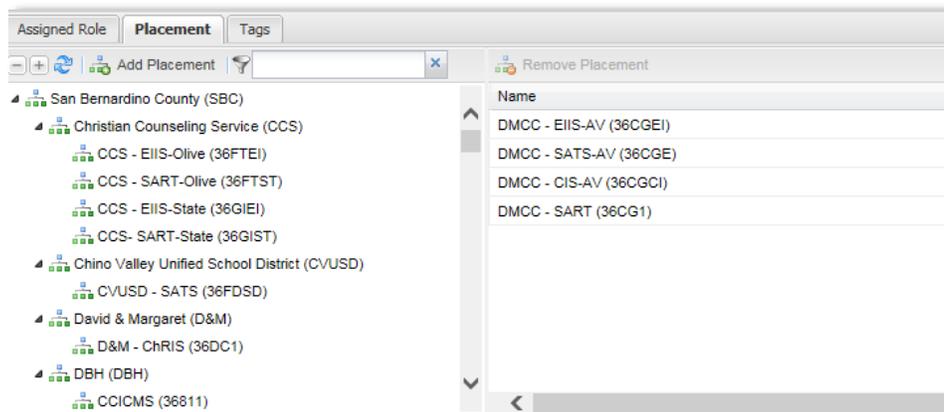


Adding and Removing Placements

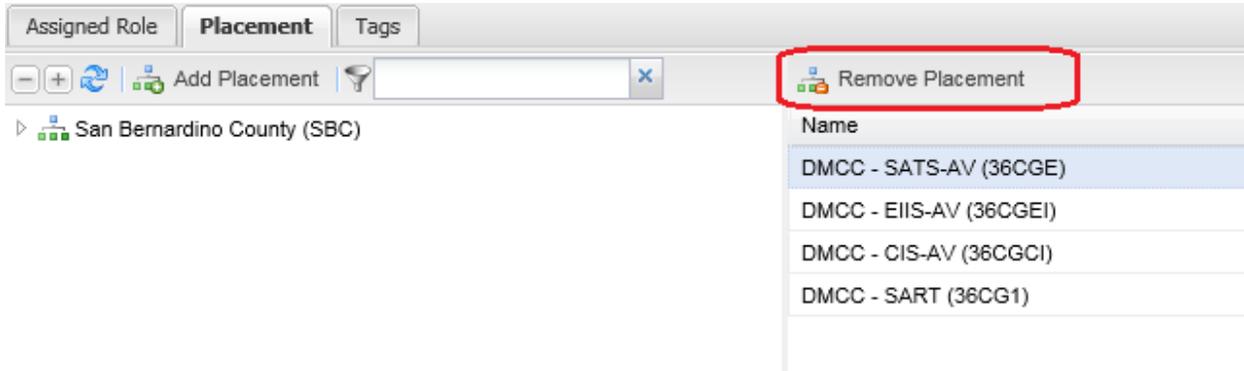
1. Click on the **Placement** tab.
2. Click on the **+** icon to expand the organization hierarchy.
3. Click on the **RU** that this user is associated with.



4. Click on **Add Placement** to complete the association. The new association will appear in the right pane.



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



6. Be sure to save your changes to ensure they go into effect by pressing the Save button at the bottom.



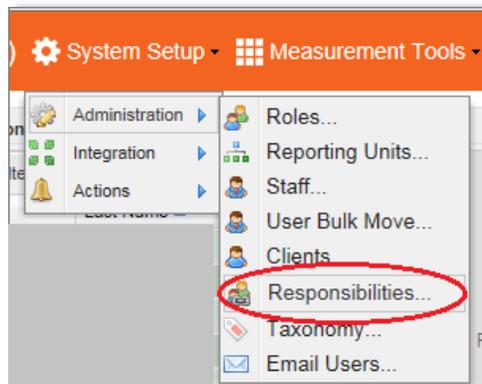
Viewing Responsibilities

Responsibilities involve relating staff, clients, and organizational units. Responsibility assignment is what determines the ability to view the different organizations (RUs), clients, as well as staff assigned to supervisors and management. Responsibilities are automatically assigned or removed based on the placement(s).

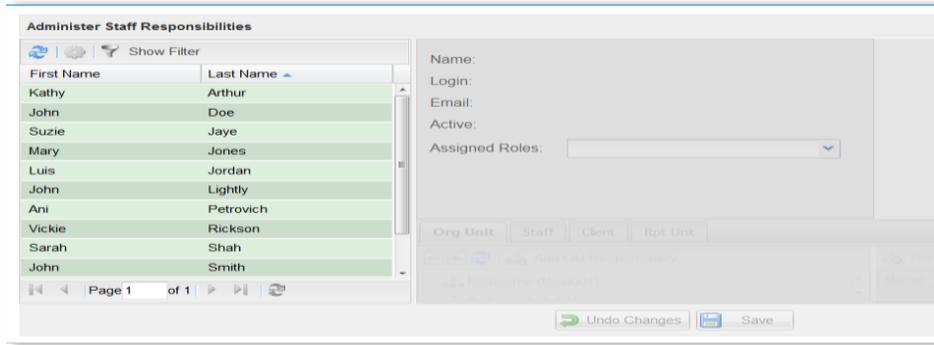
1. If you wish to view a staff member's responsibilities, click the Admin box from the Dashboard of Menu Options.



2. Click System Setup at the top, hover over Administration, on the sub menu, click Responsibilities.

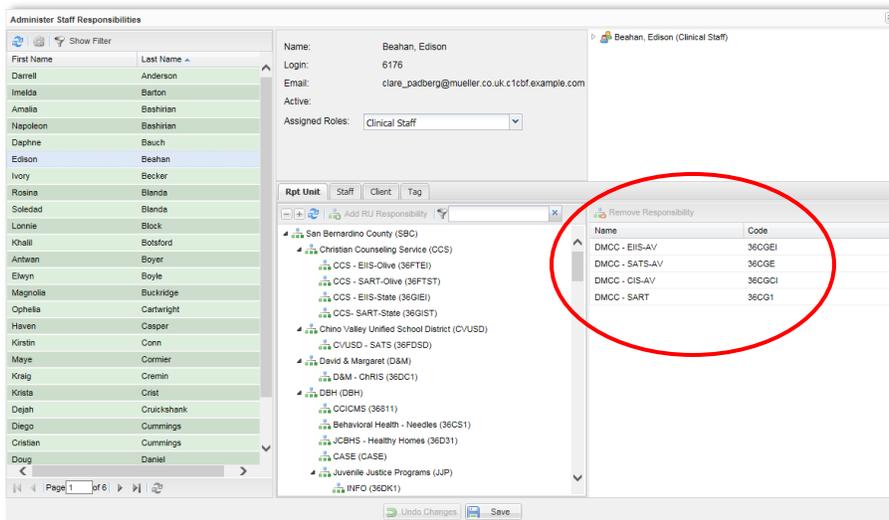


The Administer Staff Responsibilities screen appears:



To view responsibilities, utilize the filters to find the staff member whose responsibilities you wish to view.

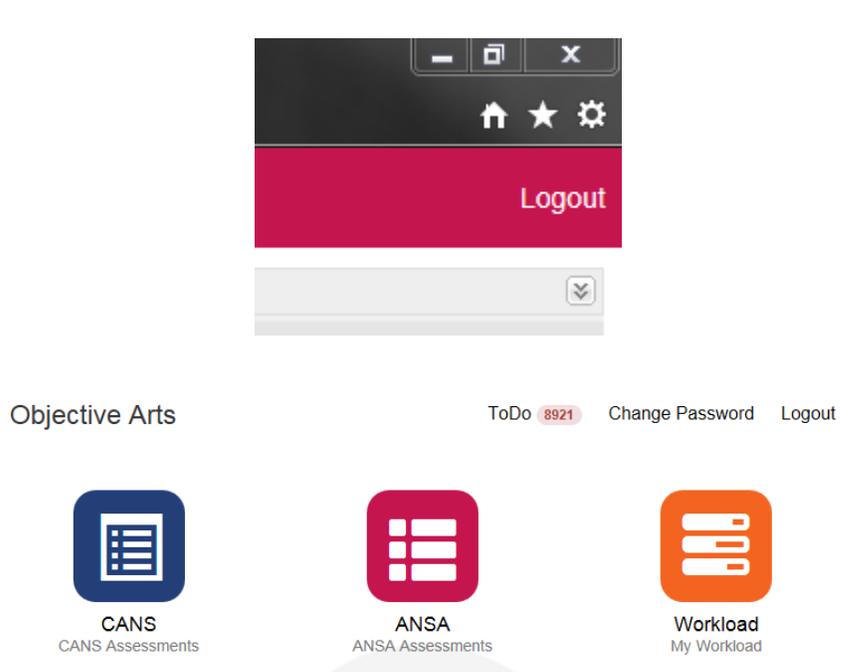
3. Select the staff member by double clicking on the name to show the responsibilities. The staff member's responsibility will be located on the right of the screen.



Logging Out

Logout: after having entered the desired data, end the session.

To log out, click the Logout at the top right of your screen.



Closeout: Close your browser after your OA session.

For assistance, please contact your agency's Objective Arts super user. Super users are the point persons for all OA related questions and will contact BHCS with Objective Arts questions and issues that they are unable to help you with.