System Administrator at your agency is:

Name(s) _____

Email(s) _____   Phone/Extension _____

A. Logging in

Log in here: https://alameda.oasmr.com/cas/login (Ensure that you are NOT on OA Training).

B. Password

You will receive an activation email. Follow the Link in the email to set your initial password. If this link does not work or you do not receive the email your System Administrator can reset it. If your admin sets your password you should reset it immediately. Click on "Change Password"

**Objective Arts**   ToDo **0**   Change Password   Logout

➔ Forgot your password? Please request a reset from your BHCS or CBO System Administrator.
  o **Tip**: OA will ask you to reset your password every 90 days.

C. Creating Assessments

Note these instructions are based on Default entry mode. You will see this icon [≡ OFF] on right hand bottom of screen. (If you are in "Quick Data Entry Mode," you will see this icon [ON ≡])

[Workload / My Workload]
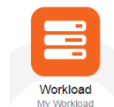
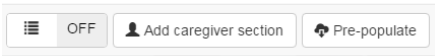Easiest way to create an Assessment is to click on "Workload."
Here you will see a list of clients who are assigned to you.

➔ Double click on Client's Name> Click **+ New Assessment** and the CANS or ANSA will auto appear based on your client's age > Click on **CANS/ANSA icon**> and begin
  o Fields for Client ID, Client Name, Assessor, Date of Birth, Client Gender will auto populate. Disregard field Entered By.

➔ Field **Assessment Date**: This will auto-populate **today's date** and is the date that Assessment was first created. You are allowed to edit this date before hitting **Submit**.

➔ Enter **Rpt Unit**: Enter the Reporting Unit (RU) for the client from the drop down list. Assessment won't save if a RU is not chosen.

➔ Click **Assessment Information** and choose from:
  o *Initial Assessment*: First due when opening case (within 60 days of Episode Opening Date)
  o *Scheduled Update*: At 6 month mark or Annual (due by the end of the 5th month for 6th month mark or 11th month for annual)

- **Major Life Event**: When clinically significant changes occurred in client's life. Include narrative in next box (i.e. "Client was hospitalized for danger to self at Willow Rock" or "Client entered Juvenile Hall." Or "Client was removed from mother's care and now in foster care."
- **Planned Discharge**: When discharge is planned with client and/or caregiver
- **Unplanned Discharge**: When discharge is unplanned (i.e. client has been no-showing despite outreach efforts, etc. or clinician has not been able to communicate with client)

➔ Click **Next tab*** and begin scoring items. Don't forget to hit Add Caregiver Section for CANS and ANSA-T when scoring caregiver needs.

➔ If you are ready to **finalize and submit** the Assessment. Hit SAVE and refer to **Section E.**

➔ If you need to return to the Assessment and complete another day, Hit SAVE and refer to **Section D**.

D. Editing Assessment (i.e. once you've already hit SAVE once)

➔ You can access assessments "in progress" in two ways:

A. From the Dashboard/Home Page, click on Workload   OR

B. Click the "Data Portal" icon and then at the top of the screen using the "Assessments" tab. Select from the drop down list "My In-Progress" and all the Assessments that have been started but not yet completed and/or approved will appear there as one of three things: Assigned or Submitted. Once it has been approved, it will appear as "Approved by…"

➔ Identify which client you need to work on, **double click on** client's name and the saved Assessment should appear with the saved data

➔ Hit Edit on the bottom right and you will able to enter data

➔ Scroll all through the Domains to ensure that required items are scored, including the extension modules
   - **Tip**: Required items are marked with an asterisk*

E. Submitting Assessments

- If your "role" in OA is "Clinician", your Assessments must be approved before finalized and submitted. Hit **Submit.**
- If your "role" in OA is a "Senior Clinician," you will have the permissions to approve your own Assessments. Hit **Submit and Approve**
   - **Tip**: For more information, please refer to your internal agency's protocols for approving assessments.

F. Printing Assessments

Once Submitted you can print out the Assessment with the following choices:
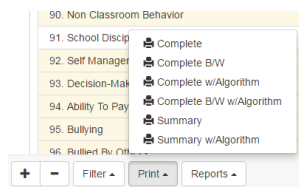
Helpful Hints about…

Dashboard

Home

To view Dashboard, hit Home at any time.

Entering Data

- ✓ Enter data by clicking on bubbles or using tab on your keyboard to enter numbers
- ✓ Click on Add Note if you would like to enter narrative   Add Note

Extension Modules
- ✓ Extension Modules are **required if triggered by a score or 1, 2, or 3**. In Default mode (NOT quick entry data mode. See Section C for details), the extension module items will automatically appear in gray shade.

Pre-Populate
- ✓ Once an Assessment for a client exists in OA, you will be able to use the data entered from a previous Assessment by hitting the Pre-Populate button. If you hit Pre-Populate it copies the scores from the previous assessment to the new assessment,   so you don't have to worry about overriding the previous   one.

- ✓ You are able to pre-populate an Assessment that was completed by another clinician and/or from another reporting unit.

Miscellaneous
- ✓ Google Chrome is the recommended browser.
- ✓ Your OA user name is always your INSYST ID number.
- ✓ Save periodically. OA system DOES NOT save automatically. Users must do this on their own.
- ✓ If inactive after 30 minutes, you will be logged off automatically. If you are doing an assessment and leave the window open and have not saved the assessment, you may lose it! Please save at least every 15 minutes.