On-BOARDING with Objective Arts (OA) in 1-2-3 Steps

✓ **Step 1: Complete items in this Readiness Checklist**

✓ **Step 2: Submit the "OA-SMR Readiness Attestation e-form" on the Provider's Website**

The OA-SMR CANS/ANSA Readiness Attestation form is used to certify that your organization has completed the readiness tasks and is prepared to use the OA-SMR application for CANS/ANSA data entry and monitoring. You must have a BHCS web portal account to log into the BHCS web portal *here:* **https://go.bhcsportal.org**. *If you do not have one, call BHCS IS Help Desk (510-567-8181) to obtain one. Once logged in, access the CANS/ANSA Attestation form from the BHCS E-Forms Page*

✓ **Step 3: BHCS Information System (IS) staff will assign you a GO-Live date.**

A Go-Live date is the date to start entering CANS/ANSA data in Objective Arts (for direct entry agencies) or begin uploading data (for uploading agencies). At Go Live BHCS IS will send account activation emails to all staff placed in your RUs.

Please refer to the OA Administrator's Guide for overall staff account maintenance, including FAQs:

http://www.acbhcs.org/providers/CANS/docs/OA_Sys_Admin_AC_Quick_Ref_Guide.pdf

☑READINESS CHECKLIST

☑ Staff Certification: REGISTERING ON PRAED AND ON-GOING CERTIFICATION TRAINING

🔒 https://canstraining.com/login

Praed Foundation Collaborative Training Website

Annual training and certification is required for use of CANS/ANSA. In order to be certified, clinicians must demonstrate reliability on a case vignette of .70 or greater. All Users become certified through the **Praed Foundation CANS Collaborative Training Website:** http://www.canstraining.com

1. ☐ Staff are trained and certified through the Praed Foundation.
2. ☐ Each staff registers with the following, please ensure:
   a. Under "Choose Jurisdiction," select "California-Alameda County" jurisdiction and then select their agency
   b. Enter InSyst Staff ID # in the "External ID" (or "External GUID") field. **Please emphasize the importance of this step. If not complete, certification will not show up in Objective Arts and user will not be able to create a CANS or ANSA.**
   c. Enter work email (not personal email)
   d. Remember their user name and password

*If staff do not do complete steps a-c above accurately, they must log in and edit their profile CANStraining.com with the correct information as directed above. To edit profile, once logged in, staff clicks on their name on upper right hand corner and selects "Edit Profile." Remember to save changes!

    👤 Profile
    🕘 Test History
    ✹ My Certificates
    📄 My Receipts
    ⚙ Site Admin
    ✏ Edit Profile
    ⏻ Sign Out

3. ☐ Identified at least two staff (i.e. clinical supervisor, program manager, and training director) to become your "In-House" Agency CANS/ANSA Trainers. These staff must have attended the "Train-the Trainer" workshops led by John Lyons, PhD or April Fernando, PhD provided by ACBHCS.

4. ☐ After the initial training provided by ACBHCS, In- House CANS/ANSA Trainers facilitates certification trainings for clinicians and other staff on an on-going basis.

5. ☐ After being trained in-person or by using the on-line training on Praed, staff will go to http://www.canstraining.com to take Final Exam and Certify.
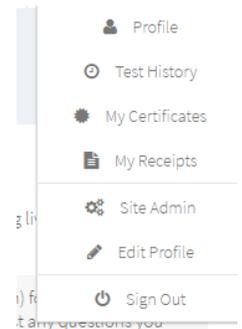
☑ CLIENT EPISODES: Only current client episodes will be transferred from InSyst into OA

☐ Client Episodes are current in InSyst. (Tip: This may take considerable time and effort.)

    a. Use InSyst report # 121, Open Caseload Report, for reference.
    b. Primary Clinician is **current** active staff (Only episodes with active staff will be transferred into OA.)
    c. Reporting units are accurate (Only episodes with active RUs will be transferred into OA.)
    d. Episodes are closed if appropriate.
    e. Episodes are transferred to OA (Use Clients by RU report in the Training Environment)

☑ STAFF: Active Staff/InSyst ID#s will be transferred from InSyst into OA.

1. ☐ CBO/BHCS "Lead" System Administrator and at least 1 additional System Administrator per agency have been identified. BHCS IS Staff must assigned the CBO/BHCS "Lead" System Administrator role. Then "Lead" System Administrators may assign additional System Administrator role. Email:

2. ☐ All staff have InSyst Staff ID #s. Staff ID #s are created in InSyst, not in OA.
   a. Staff who will create assessments must have Insyst Staff ID #s.
   b. Administrative staff accessing OA must have Insyst Staff ID #s, including Directors, System Administrators, Data Uploaders, Supervisors approving assessments, and Support staff (e.g clerks)

3. ☐ All staff are active in InSyst in order to trigger transfer to OA.
   a. Staff with end dates on their InSyst staff ID # have had their end dates removed.
   b. Staff who have not had any services in the last year have been activated for transfer.
      i. Inactive staff may be activated via the InSyst Staff ID # Update request e-form. Use the "OA Transfer" checkbox.

4. ☐ Submit Staff User Spreadsheet
   a. Access the Staff User Spreadsheet here: http://www.acbhcs.org/providers/CANS/resources.htm
   b. Complete Staff User Spreadsheet. Spreadsheet will supply OA Roles, Work Email Addresses, Professional Suffixes, Job Titles, and Placements
   c. System Administrator sends Spreadsheet to BHCS IS for OA processing. Errors from Error Report have been corrected.

Note: Once initial Staff User Spreadsheet is submitted, any additional staff <u>must</u> be added by the CBO/BHCS System Administrator.

5. ☐ *Optional*: For Clinicians Gateway users,
   a. Verify the staff ID # information on the View Staff page. (especially staff type and no end date)
   b. Verify Profile Information; Email, Professional Suffix and Job Title.
   c. Submit InSyst Staff # Update Requests to the BHCS Help Desk for any needed updates.

☑ OA-Training Verification:

REVIEW INFORMATION IN OA TRAINING SITE: https://training-alameda.oasmr.com

Training Login: Username is the Staff ID#. Default password will be the string "PassXXX" where XXX is equal to the Staff ID number of the user. So for example user with Staff ID 1234 can access the training site with password "Pass1234". Each night the password will default back to PassXXX.

1. ☒ System Administrator verifies that client episodes are in OA Training with the correct reporting units, Primary Clinician and Primary Physician. (Fixes done in InSyst)

2. ☐ System Administrator verifies in OA Training that all staff who will need access to OA have been transferred to OA. (If they need a Staff ID# or to trigger a transfer, use the InSyst Staff ID request e-form) **Do not update any accounts at this point.** Every night the OA Training Site is refreshed and changes will be lost.
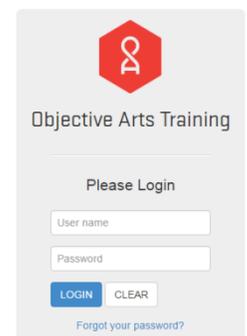
3. ☐ System Administrators verifies that all CANS/ANSA Certifications from CANStraining.com/Praed Foundation have transferred into OA. (If not, work with Alex Jackson and/or your technical assistant.)

After the three items above are complete, System Administrators should email their technical assistant, Alex Jackson, and BHCS IS staff to obtain a password for OA production. BHCS IS will work with the agencies to verify that client episodes and staff are in OA before giving them passwords to Production.

☑ OA-Production: TASKS IN OA PRODUCTION SITE:
https://alameda.oasmr.com
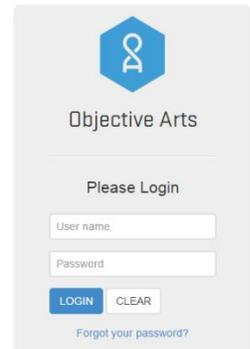
1. ☐ System Administrator requested from BHCS IS their password for OA Live Production Site

2. ☐ System Administrator logs into OA Live Production Site **(https://alameda.oasmr.com)** and assigned additional System Administrator roles as appropriate (at least 2 per agency).

3. ☐ System Administrator has verified or manually entered Staff Profiles in OA Production Site. (If Staff User Spreadsheet was not uploaded, then complete staff profiles.)
   o Verify or assign Roles in OA. (Roles permit or restrict actions. See OA Role description chart here: http://www.acbhcs.org/providers/CANS/docs/2015/OA_Roles_Permissions.pdf
   o The role of Clinician will be defaulted into OA. **The System Administrator must assign any different role.** Replace that role if the staff will not write assessments. Users can only see other users with lower placements than themselves.
   o Verify or assign Placements = RU or Organization (determines which set of clients and staff are available for viewing and writing. Users with organizations can see all, Users with only RU can only see those clients or staff in that RU.)
      ▪ For Clinician's Gateway users: Update RU placements via Clinician's Gateway account update request. Non-Clinician's Gateway users: CBO Administrator assigns in OA.
   o Verify/assign the email address. Use work e-mail. Administrator can correct in OA or CG.
   o Verify/assign Professional Suffix and Job Title. Administrator can correct in OA or CG.
   o Verify the "staff type" found on the staff profile "tags" tab. Correct any errors using the InSyst staff ID # Update request.
   o For any staff not appearing (or missing) in OA, you must:
      i. Check that staff entered their Insyst ID# in the External ID field when registering for CANStraining.com/Praed Foundation. If not, ask staff to log into their CANStraining.com account and edit their profile (click on upper right corner when logged on) to make sure External ID (or External GUID) = Insyst Staff ID#
      ii. Go to the **"STAFF"** section of this checklist and review items #1 and #2
      iii.
4. ☐ **Ongoing new staff ID#s**: After the initial on-boarding of staff, new staff ID#s will be transferred from InSyst to OA within a few days of creation. Use the Systems Administrator TIP SHEET: New Hires, Transfers & Terminations for summary of steps. This is a quick reference guide to set up new hires, transfers, and terminations of staff.
   http://www.acbhcs.org/providers/CANS/docs/2016/Sys_Admin_TIP_SHEET_NH_Trans_Terminations.pdf

5. ☐ System Administrator will then work in OA to complete the staff profile, adding roles, placements, email address, professional suffix and job title. Ensure the "Active" box is marked when the profile is completed.
    o For Clinician's Gateway agencies, full staff information will be transferred into OA. The role of Clinician will be defaulted into OA. **The System Administrator must assign any different role.**

TIP: You can run the following reports in both OA Training and OA Production by clicking on the "Report" widget and look under "Shared Reports" to help troubleshoot staff needing updates/fixes.
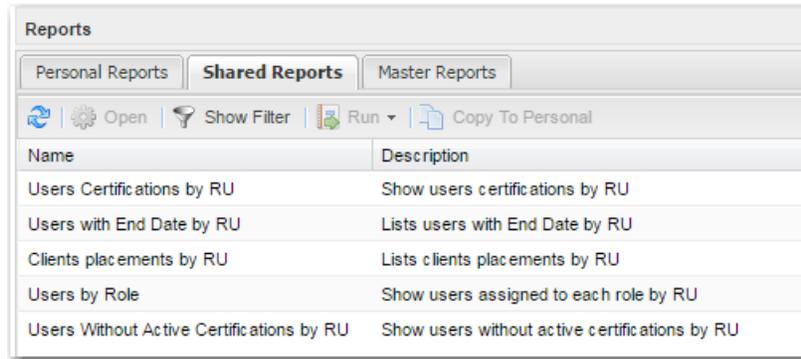
☑ OA Staff Training: LEARNING HOW TO ENTER DATA IN OBJECTIVE ARTS

1. ☐ Assigned Objective Arts experts/trainers within the agency as needed

2. ☐ Experts/Trainers will watch the OA training videos (**section below with descriptions of each tutorial**) at https://www.youtube.com/channel/UCVIV8xpklj4P1IOypNJ0nqw/playlists and practice in the OA Training environment at https://training-alameda.oasmr.com.

3. ☐ Experts/Trainers train agency staff to use the OA-SMR application in the OA Training environment at https://training-alameda.oasmr.com.

4. ☐ *Optional*: Experts/Trainers share the Clinician User Guide TIP SHEET - http://www.acbhcs.org/providers/CANS/docs/2016/OA_Clinician_Tip_Sheet.pdf This is a quick reference guide on how to create CANS/ANSA assessments. Also includes helpful hints about navigating Objective Arts.

5. ☐ *Optional*: For uploaders, CBO IT staff will collaborate with OA staff to build upload link for assessments. CBO IT staff has altered in-house CANS/ANSA tool to meet County data collection requirements. Note: Although agencies uploading assessments may not have many clinical staff use or "touch" OA, assessments can still be uploaded.

Objective Arts Tutorial Videos: https://www.youtube.com/channel/UCVIV8xpklj4P1IOypNJ0nqw/playlists

Alameda CBO Admin – http://youtu.be/Elc2TpC_DJI

- Log on as CBO Administrator
- Activate User

- Assign Roles
- Assign Placements.

Clients List – http://youtu.be/xLkFw3x72ZQ

- Navigate through lists of Clients
- Use Filters
- View a Client's Assessments
- Add/Remove Clients to Workload

Assessments List – http://youtu.be/lrFWDi4qfZM

- View and navigate through lists of Assessments
- Use Assessment Filters such as Organizational Unit filter, et al.

New Assessment – http://youtu.be/rjbtp4etJ-c

- Create a new Assessment
- Simple Assessment Data Entry (for ACE Assessment)
- Delete Assessments

CANS Data Entry – https://youtu.be/AEfqUC4O488

- Enter data into a CANS
- Use Assessment pre-populate feature.

Submit Assessment – http://youtu.be/Wh1NsorYhVs

- Submit an Assessment
- Assessment validations
- Navigate through validation error,

Approve Assessment – http://youtu.be/q9I315gbPi4

- Approve an Assessment
- Reject an Assessment
- Use Sequential Approval feature

Reports - https://www.youtube.com/playlist?list=PLHcGj4_SxYiF5l_Ru2f9lfS0b8ngFS3Jr

With regard to any of the videos, there may be subtle differences in appearance between the system used in the videos and the Alameda County system. This is, in just about every case, due to slightly different configurations used for the demonstration system. For example, the questions in the CANS assessments may not correspond directly between the videos and the Alameda County CANS. The general principles remain the same.