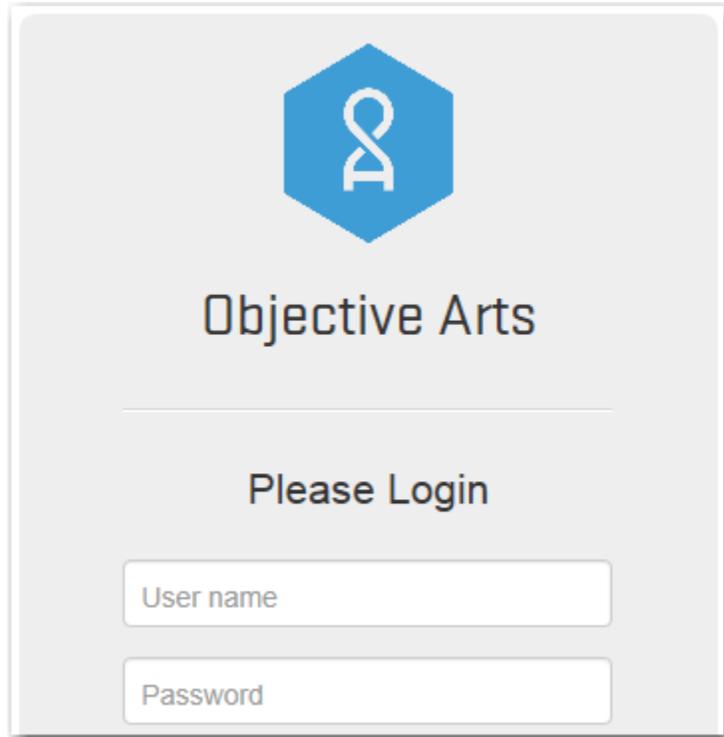


# OA Administrator's Guide

Quick Reference with Alameda County Specifics



## Objective Arts CANS/ANSA

ALAMEDA COUNTY SPECIFIC ADMINISTRATORS GUIDE  
FOR OBJECTIVE ARTS SMR  
CANS/ANSA APPLICATION

Table of Contents (hyperlinks)	page
1. <a href="#">Logging In</a>	3
2. <a href="#">Support Contact Information</a>	4
3. <a href="#">Training Videos</a>	5
4. <a href="#">Staff Account Maintenance</a>	6
5. <a href="#">Staff Account FAQs</a>	8
6. <a href="#">Staff Account Reports</a>	9
7. <a href="#">Client Account Maintenance</a>	11

# OA-SMR SYSTEM ADMINISTRATOR GUIDE (CANS/ANSA)

This document describes System Administrator procedures concerning staff and client maintenance for the Objective Arts CANS/ANSA Assessment application specific to Alameda County. Trouble shooting tips are included. System Administrators are responsible for maintaining and troubleshooting staff and clients in the OA-SMR application.

## LOGGING IN:

**Training Site:** <https://training-alameda.oasmr.com>

**Live Data Production Environment:** <https://alameda.oasmr.com> (available to organizations, by arrangement, as they meet the Readiness Checklist requirements. Go-live is scheduled after the OA Readiness Attestation is submitted and all staff have been trained using the Training environment.)

**Training Login:** Username is the Staff ID#. Default passwords will be supplied to the Administrator when the organization is ready to begin training.

**Initial Login:** Username is the Staff ID #. Users will be sent an email to set their password when their account is activated. If a user does not receive their activation email, the CBO System Administrator can re-send the email to the user by clicking the "Resend Activation Email" button on the Administer Staff page. Please make sure the email associated with the user is correct by opening the user profile in the Administer Staff view. (See Staff Administration below)

When an organization is on-boarded, activation emails will be sent to **all users with a complete profile** who belong to the organization. If a user does not have a complete profile, he/she will not receive an activation email and the CBO System Administrator will have to manually complete the user profile (see below). To check if an activation email has been sent to a user, open the user profile and check the user "Status" (e.g. "Active (activation email sent)").

## **OBJECTIVE ARTS SUPPORT DESK:**

- OA is available for onboarding and for data batch upload support. Administrators contact OA to arrange data uploads.
- **Once in production, System Administrators and in-house experts are expected to support their organizations for all issues regarding user questions, training, client maintenance, and troubleshooting.**
- System bug issues will be reported to OA through Alex Jackson who will contact the ACBHCS Help Desk.

Phone: 312-977-1150 Eastern time zone

Email: [dbonicelli@objectivearts.com](mailto:dbonicelli@objectivearts.com)

Help System: <http://wiki.objectivearts.com/bin/view/Documentation/WebHome>

## **CERTIFICATION MANAGEMENT: Chapin Hall at the University of Chicago**

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

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

## **TRAINING: OA Tutorial Videos**

Training is accomplished via tutorial videos and user manuals.

You Tube Channel = <https://www.youtube.com/channel/UCVIV8xpklj4P1IOypNJ0nqw/playlists>

User manuals can be found on the BHCS Providers Website in the CANS/ANSA page.

## **TRAINING: OA Tutorial Videos**

**You Tube Channel** = <https://www.youtube.com/channel/UCVIV8xpklj4P1iOypNJ0ngw/playlists>

Alameda CBO Admin – [http://youtu.be/Elc2TpC\\_DJI](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/Wh1NsrYhVs>

- Submit an Assessment
- Assessment validations
- Navigate through validation errors

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

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

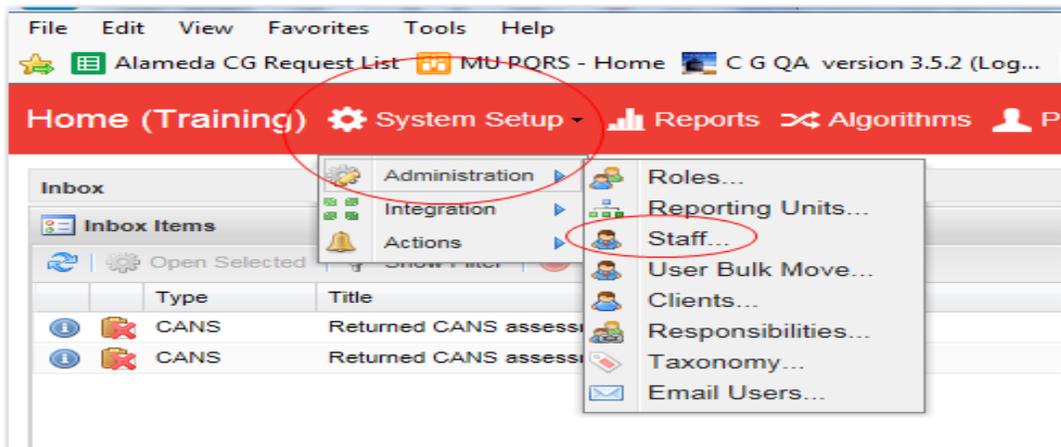
With regard to any of the videos, there may be subtle differences in appearance between the system used in the videos and the Training Alameda system. This is, in just about every case, due to slightly different configurations used for the demonstration system. For example, the questions in the CANS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

## **STAFF ACCOUNT MAINTENANCE:**

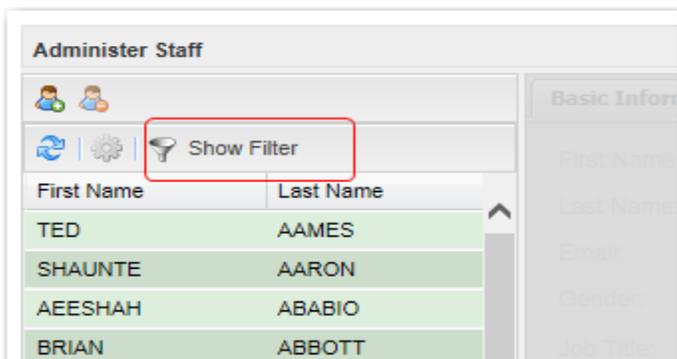
1. **Staff ID #s are added or updated in InSyst**, not in OA. (This may be someone else’s job at your organization.)
  - a. Newly created staff will be transferred to OA within a few days.
  - b. Staff with end dates on their account will not be transferred into OA.
  - c. Initially, existing Staff who had no services within the last 24 months were not transferred to OA. Request their transfer to OA on an InSyst Staff ID # Update request e-form.
  
2. **Watch the OA YouTube videos for training.**  
(<https://www.youtube.com/channel/UCVIV8xpklj4P1IOypNJ0nqw/playlists>)  
(Reference Addendum A for individual subjects)
  
3. **Complete staff profiles in OA:** Email address, suffix, job title, Roles and Placement RUs. Clinician's Gateway staff only need to have their Roles adjusted. The default Role for all accounts is Clinician. Clinicians need supervisor approval. Once all information is provided for a new user, an email will be automatically sent to the user so that he/she can set his/her password to access the system.

Contact Alex Jackson for assistance with the initial upload of staff via OA User Spreadsheet if needed.

Example: Finding a staff person in order to update their profile.



Use “Show Filter” to filter for the name of the staff person.



Double click on the name to open their account profile.

- Add email, job title, professional suffix.
- Add role.
- Add organizational placement.
- Check staff type in the “tags” tab.

You may manually set or change the user password. For new users, once all information has been entered, an activation email will automatically be sent to the user and their status changed to "Active (activation email sent)". For existing users, an activation email can be resent clicking on "Resend activation email".



- Check the “Active” checkbox.

(see link to Administrator training video)

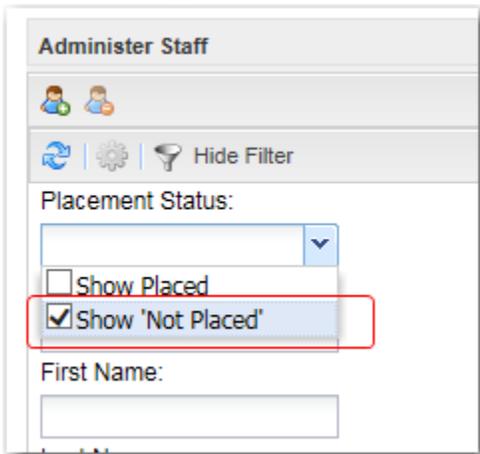
4. Troubleshoot missing staff, or staff with missing RUs (placements) or permissions. (see FAQs below.)
5. De-activate staff when they should no longer access the system by adding an end date in InSyst (request via BHCS InSyst Staff ID # Update request e-form). To immediately deny access to the application, uncheck the “Active” checkbox on the Profile page found on the right, below the Login ID #. Also remove all placements associated with the users: click on the first placement, then click on the last placement while pressing the "shift" button, click on "Remove Placement" and then "Save". This frees the staff person for their next organization.



## FAQs concerning Staff Accounts:

### Q: My staff person isn't in OA, what can I do?

- Check whether they have an Alameda County staff ID #. Is there an end date on their staff ID #? Your staff who manage accounts or billing will know. The ACBHCS Help Desk can research the staff ID # in InSyst.
- The staff person may not have any placements (RU or organizations) defined, so are not seen by anyone in your organization. They may be found as an "unplaced" staff person. Add "Not Placed" into your Administer Staff Filter criteria.

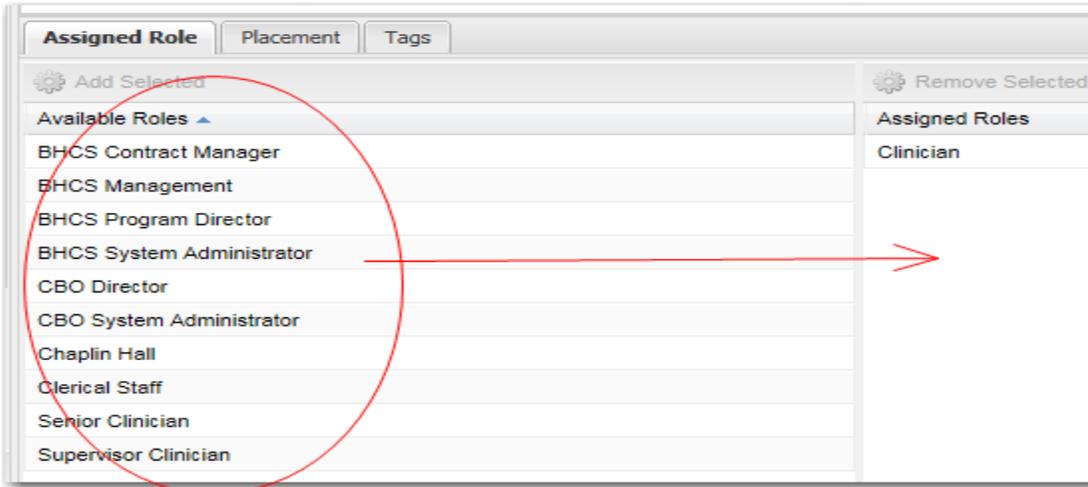


- If the user has transferred from another organization and you cannot see the user in the list of unplaced users, please contact the CBO System Administrator of the previous organization or the ACBHCS Help Desk to have the user unplaced so you can place him/her in your organization.

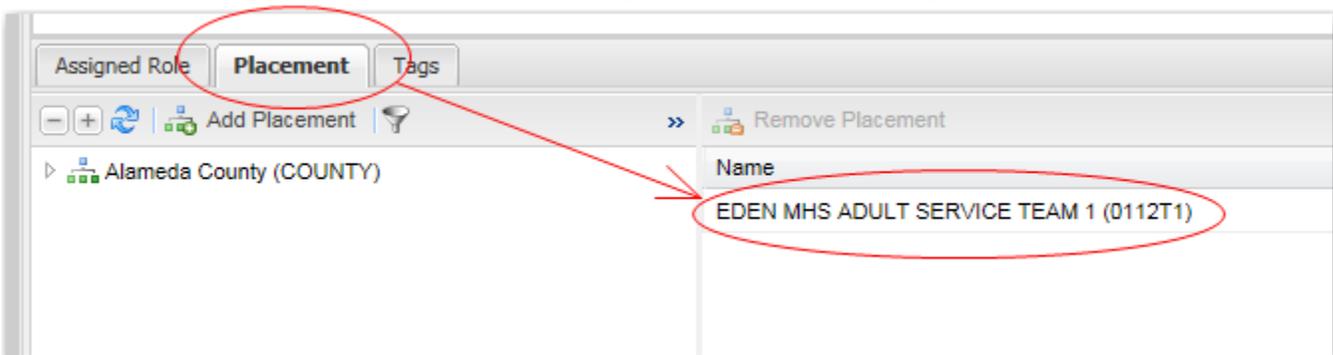
### Q: My staff person can't enter an assessment, approve an assessment, or run a report.

- Check the roles assigned to the staff person. You can research by individual staff or in the Shared Reports tab in the Reports view running the "Users by roles" report. (Reference the list of roles for their permissions). Senior Clinicians can self-approve assessments and Supervisor Clinicians can approve assessments for other users. Clerical Staff can specify the approver of an assessment as long as the user selected as approver is a Supervisor Clinician. Clerical staff can enter and finalize assessments for Senior Clinicians.
- Check for placements (=organization or RU) for both staff and clients. They must match.
- Check for current certifications in Shared reports, running the "Users Certifications by RU" report. Users without an active certification cannot enter assessments into the system (this is also true for uploaded assessments). Please contact Chapin Hall for issues related with certifications.
- Check for end dates in Shared Reports, running the "Users with End Date by RU" report. If the user is end dated, please open a ticket with the ACBHCS Help Desk to have the user end date removed.
- The assessment date cannot be more than 90 days in the past.

Look up an individual staff person as described above to check their assigned roles and their placements.

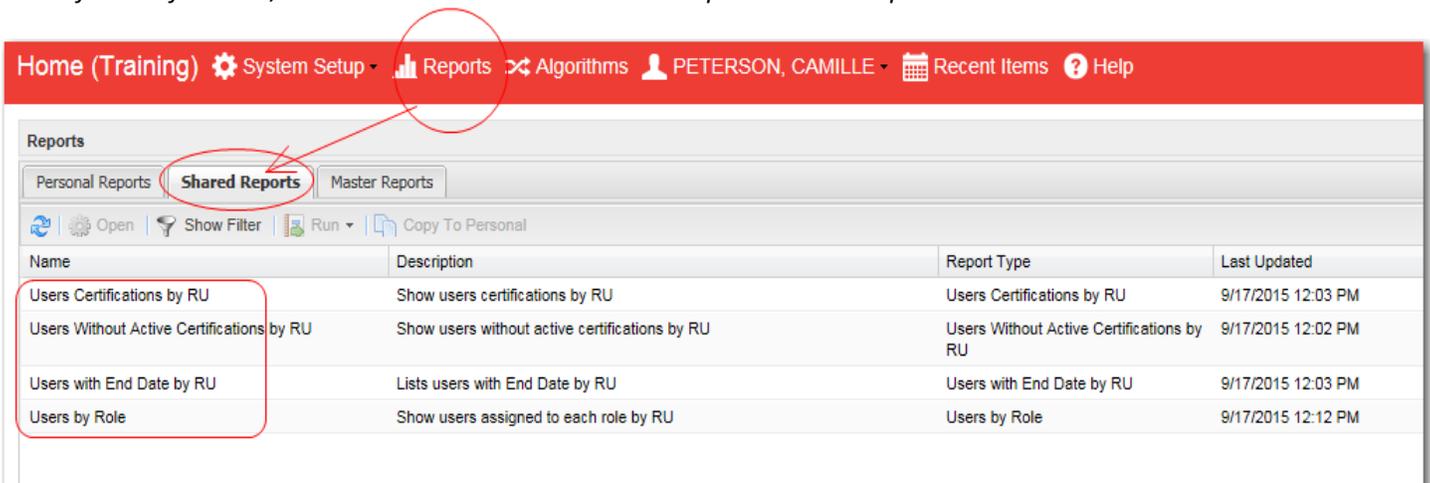


Check for the placement for the staff person (your organization or the reporting unit must match the client's.)



## **STAFF ACCOUNT MANAGEMENT REPORTS**

Check for certifications, end dates or roles in the "Shared Reports" in the Reports window.





**Useful reports to manage users:**

The ACBHCS administrators have shared four reports that can be used to more easily investigate issues with users in the OA system. These reports can be found in the "Shared Reports" tab under the "Reports" view (yellow button from the home page). To run a report, select the report and then click "Run - Immediate".

1. **Users Certifications by RU:** this report lists all the users, placed in RUs you are responsible for, who are CANS/ANSA certified along with their certification information. By default all RUs you are responsible for are aggregated and you can drill down to look at single RUs clicking on the "All RUs" link. You can see the total number of certified users at the end of each RU section or on the last page when looking at all RUs.

Users Certifications by RU					
Active only:	false	RU(s):	01082, 01122, 01191, 01194, 01222, 01322, 01522, 018444, 01AE01JY3, 81092, 81503, 81692, 81781, 81875, 01028, 0108T1, 011201321, 0132M1, 01521, 0152M1, 0163T1, 018435, 01AY1, 01EE1, 01F41, 01F71, 01FZ1, 01H11, 01H21, 01LK1, 01LU1, 01MG1, 76781143, 81151, 81163, 81166, 8133T1, 8133T2, 81486, 81487, 8189999CG, 99996, 010511		
Current certifications only:	true				
User	Type	Date	Expiration	Score	
<a href="#">All RUs</a>					
	ALAMEDA_ANSA_T	September 10, 2015	September 10, 2016	0.74	
	ALAMEDA_CANS	September 10, 2015	September 10, 2016	0.74	
	ALAMEDA_CANS_ZERO_TO_FIVE	September 10, 2015	September 10, 2016	0.74	

Clicking "All RUs" groups the clinicians into RU groups.

ASIAN ADULT SERVICE TEAM 1 (0163T1)					
	ALAMEDA_CANS_ZERO_TO_FIVE	July 1, 2015	July 1, 2016	0.76	
	ALAMEDA_ANSA_T	July 1, 2015	July 1, 2016	0.76	
	ALAMEDA_CANS	July 1, 2015	July 1, 2016	0.76	
					<b>Total number of users: 1</b>
CAPE INC 0-6 MHS CHILD (01F51)					
	ALAMEDA_CANS	June 29, 2015	June 29, 2016	0.87	
	ALAMEDA_CANS_ZERO_TO_FIVE	June 29, 2015	June 29, 2016	0.87	
	ALAMEDA_ANSA_T	June 29, 2015	June 29, 2016	0.87	

2. **Users without Active Certifications by RU:** this report lists all users placed in your RUs who do not have an active CANS/ANSA certification. (Users with the role of Clerical Staff, CBO Director or CBO System Administrator are not listed.) You can permanently exclude a user from this report by checking the "Does not need certification" checkbox on the user profile page and the clicking "Save". By default all RUs you are responsible for are aggregated and you can drill down to look at single RUs clicking on the "All RUs" link. You can see the total number of non-certified users at the end of each RU section or on the last page when looking at all RUs.
3. **Users with End Date by RU:** this report lists all the user placed in RUs you are responsible who have an end date in InSyst. By default all RUs you are responsible for are aggregated and you can drill down to look at single Rus clicking on the "All RUs" link.
4. **Users by Role:** this report lists all the user placed in RUs you are responsible grouped by role (e.g. Supervisor Clinician, Senior Clinician, etc.). By default all RUs you are responsible for are aggregated and you can drill down to look at single Rus clicking on the "All RUs" link.

## **CLIENT MAINTENANCE:**

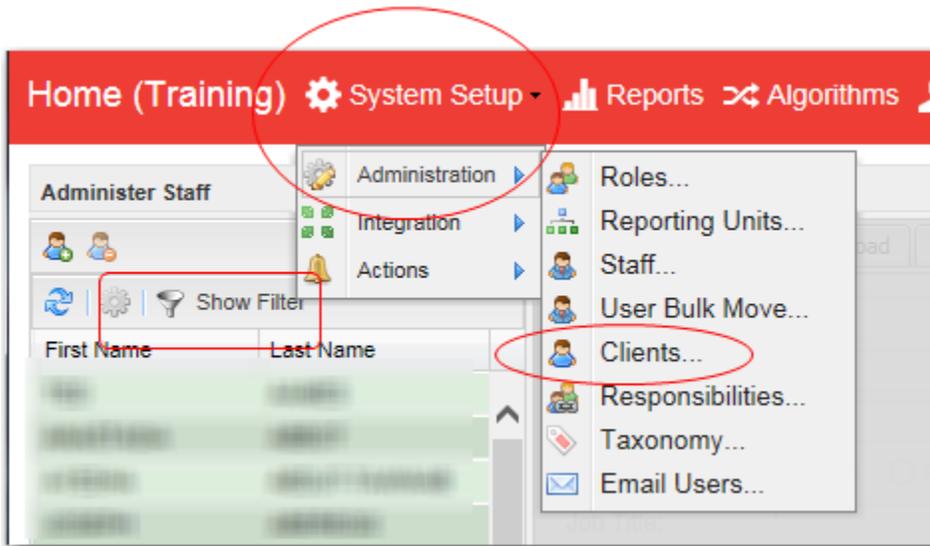
Clients and episodes will be automatically uploaded from InSyst. They cannot be altered in OA.

### Upload of Clients

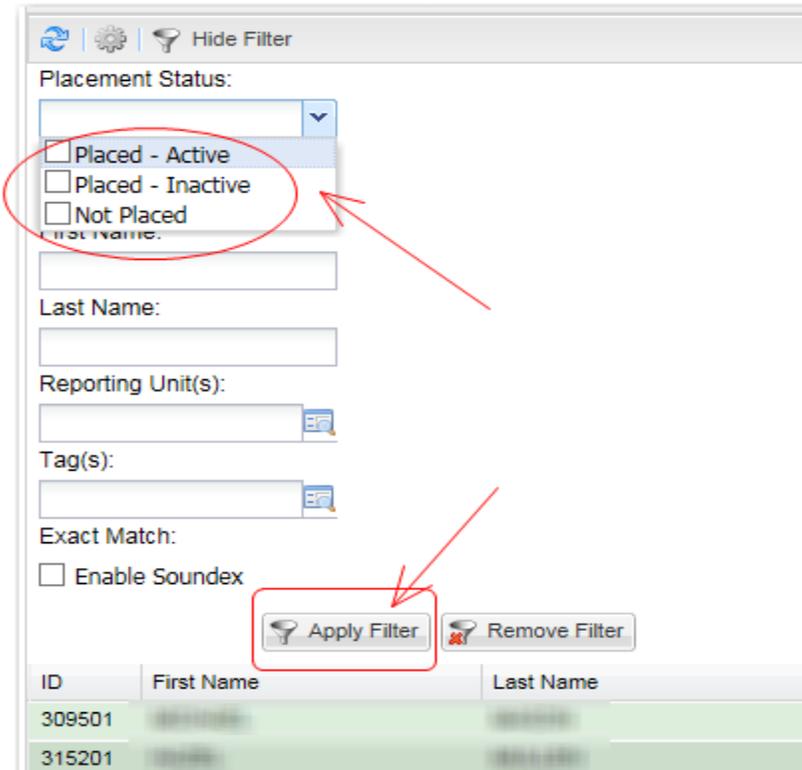
1. The initial upload of clients included all clients with services during the previous 24 months.
2. The initial upload of episodes excluded any episodes containing staff persons who were inactive.
3. New clients will be uploaded nightly as episodes are opened containing active clinicians and physicians in OA.

**FAQ FOR CLIENT MAINTENANCE:** *Q. My client isn't in OA. What can I do?*

*a. Search for clients in System Setup/Administration/Clients. Then "Show Filter" to look for unplaced clients.*



*Add "Inactive" or "Not Placed" as a filter criteria. Apply Filter.*



Double click on the name of the client. Then look in the Organizational Placements tab to see Placement RUs. Placements can only be added through InSyst episodes.

The screenshot shows the 'Administer Clients' interface. On the left, a table lists clients with columns for ID, First Name, and Last Name. The client with ID 750877... and last name TEST is highlighted. A red box surrounds the last name 'TEST' in this row. A red arrow points from this box to the 'Organizational Placements' tab. In this tab, a tree view shows 'Alameda County (COUNTY)' expanded to show several reporting units. One unit, 'CLINICIAN GATEWAY TEST MHS AD (9999CG)', is highlighted with a red box. A table to the right of this tree view shows the details for this placement: Name: CLINICIAN GATEWAY TEST MHS AD (9999CG), Start: 9/17/2015, End: (blank).

b. Check for an open episode in InSyst for the client, in one of your reporting units. Updating the episode in InSyst will trigger transfer into OA.

c. Verify that the clinician and physician on the episode are current and active staff. If they have not been transferred into OA, then the episode is not accepted for upload into OA. If the staff on the episode is a current staff but they are not in OA, then submit a Staff # Update request for "OA Transfer". If the staff on the episode is not a current staff, then update the episode to a current staff person.

d. Verify that the staff person and the client both have the same Reporting Units in their placements.