

SYSTEM ADMINISTRATOR TIP SHEET: NEW HIRES, TRANSFERS & TERMINATIONS

New Hires

(When staff does not have Insyst ID#)

1) Obtain Insyst ID#

- If staff does not already have an Insyst Staff ID Number, request one using the Staff Number (MHS) Form from the E-Forms in the BHCS portal (<https://go.bhcsportal.org>)

INSYST

- [Authorization \(AOD\) Request E-Form](#). Use this online e-form to setup an INSYST username and access to the INSYST database.
- [Authorization \(MHS\) Request E-Form](#). Use this online e-form to setup an INSYST username and access to the INSYST database.
- [Client Merge Request E-Form](#). Use this online e-form to merge duplicate INSYST client records.
- [Monthly Staff Change Attestation](#). Use this online e-form to report on whether any changes took place with your staff during the prior month. This form is mandatory for OIG (Office of Inspector General) reporting.
- [Staff Number \(AOD\) Request E-Form](#). Use this online e-form to request a new staff number, update an existing staff number or expire an existing staff number.
- [Staff Number \(MHS\) Request E-Form](#). Use this online e-form to request a new staff number, update an existing staff number or expire an existing staff number.

CANS/ANSA OA-SMR

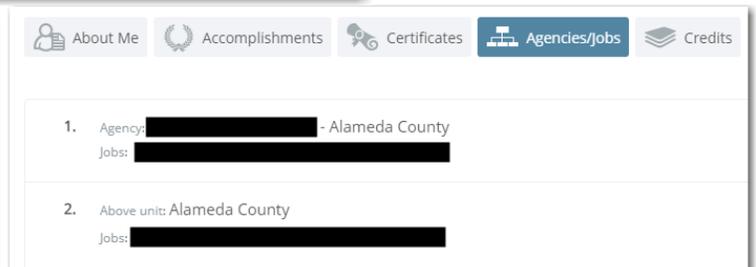
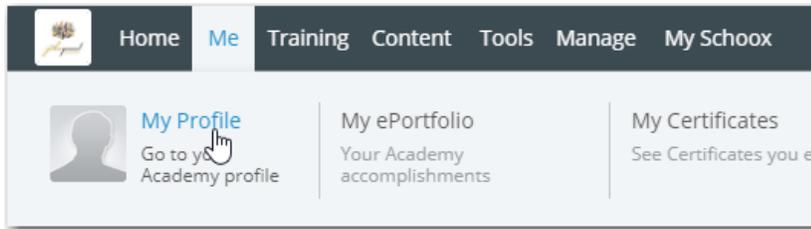
- [CANS/ANSA Readiness Attestation](#). The OA-SMR CANS/ANSA Readiness Attestation form is used to certify that your organization has completed the readiness tasks and is prepared to use the OA-SMR application for

2) Register on [Praed Foundation/Schoox](#) for CANS/ANSA Certification

- Obtain Insyst Staff ID # for staff **before** registering on Praed
- When registering, direct staff to:
 - ⇒ Enter their work/agency email (not personal email)
 - ⇒ Enter their Insyst Staff ID # into the "Insyst # / HCS ID / Staff ID" field
 - ⇒ Select USA, California, and [Your Agency] – Alameda County
 - ⇒ Take correct certification test for the Alameda County CANS or ANSA

The screenshot shows a registration form with the following fields: First Name, Last Name, Email, Password (minimum 6 characters), Username, Phone, and InSyst # / HCS ID / Staff ID. There are three dropdown menus for location selection: United States of America, California, and Alameda County. Red callouts highlight the 'InSyst # / HCS ID / Staff ID' field and the location dropdowns, with text boxes providing instructions: 'Very Important to have your Alameda County Staff #, as this is how the Certifications are transferred to Objective Arts' and 'Ensure the account is setup with US, California, and [Your agency] - Alameda County selected.'

- After registering, staff can verify these fields by logging in at [schoox.com](#), clicking on 'Me' > 'My Profile'. Then you can click about me to verify your Staff # or, click Agencies/Jobs to verify Alameda County was selected.



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3) Check Staff Profile on Objective Arts

New Hires (continued)

Once new hire is assigned Staff ID#, go to OA:
<https://alameda.oasmr.com>

1. Click on “Admin” widget and search for new hire. Remember login is Staff ID#
2. Manually enter email, job title and profession- al suffix if needed*
3. Add Placement/RU* and Edit Roles if needed (Role defaults to “Clinician”—needing assessment approvals)
4. Once staff is certified, verify that certifications were transferred correctly
5. Verify Workloads
6. to hit SAVE

Once steps 1-6 are complete, go back to profile

7. Activate account by hitting “Send Activation.” Staff will receive link and instructions to set their own password. If link does not work, System Admin can set initial password and inform their staff of this password.

*For agencies using Clinician’s Gateway, email, job title, professional suffix and placements/RUs may already be entered.

Remember, any updates in Insyst or in Praed Foundation may take 24 hours to transfer and appear in OA.

Steps 2-3- Objective Arts Admin Screen– Basic Information and Assigned Role

Type	Certification Date	Expiration Date	Status	Score
ALAMEDA_ANSA_T	5/1/2015	5/1/2016	Valid	0.8
ALAMEDA_CANS	5/1/2015	5/1/2016	Valid	0.8
ALAMEDA_CANS_ZERO_...	5/1/2015	5/1/2016	Valid	0.8
ALAMEDA_ANSA_T	4/7/2016	4/7/2017	Valid	0.88
ALAMEDA_CANS	4/7/2016	4/7/2017	Valid	0.88
ALAMEDA_CANS_ZERO_...	4/7/2016	4/7/2017	Valid	0.88

Steps 3-4 Objective Arts Admin Screen– CANS Certification & Placement tabs

ID	First Name	Last Name	Date of Birth	Status
1234567	Ima	Testcase	1/1/2001	Active
				Active
				Active
				Active

Step 5-Objective Arts Admin Screen– Workload tab data comes from INSYST

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Transferring Staff (i.e. When staff are transferring from a different agency already using OA)

- Submit a request to Update Existing Clinician Staff Number if credentials have changed since initial request
- Have staff edit their profile on Schoox
- Review Staff profile in OA (See page 2, step 3) to ensure profile reflects accurate information

Terminating Staff (i.e. When staff leaves your agency)

- Do not uncheck the “Active” box under “Status”
- Submit Expire Clinician Staff Number request on BHCS portal
- Update Insyst Episode to correct primary clinician
- Remove your agency’s Placement/RU’s and Roles from terminated staff

The screenshot shows the 'Basic Information' tab of a staff profile form. The 'Status' field is checked for 'Active' and highlighted with a red box. A red callout bubble points to the 'Leave Marked' button above it. Other fields include First Name, Last Name, Email, Gender (Male/Female), Job Title, Suffix, Cell Phone Number, Login, Password, Again, Activation email (Not sent), End Date, and Does not need certification (checkbox).

The screenshot shows the 'Placement' tab of a staff profile form. A red callout bubble points to the 'Remove Placement' button, with the text 'Make sure to remove all Placements'. The 'Assigned Role' tab is also visible. The 'Add Placement' button is highlighted. The 'Remove Placement' button is highlighted with a red box. The 'Name' field is visible below the 'Remove Placement' button.

Questions?

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