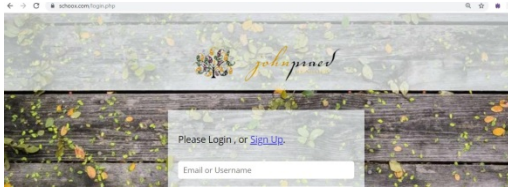


# ✓ READINESS CHECKLIST

## ✓ Staff are certified in the CANS through the Praed Foundation

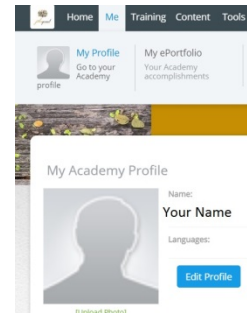


Annual training and certification is required for use of CANS. In order to be certified, clinicians must demonstrate reliability on a case vignette of .70 or greater. All Users become certified through the Praed

**Foundation CANS Collaborative Training Website:**  
<http://www.schoox.com/academy/cansacademy>

1. Certification can be achieved two ways:
  - a. Sign up for an in person training after registering on Schoox. Trainings are listed on the calendar and directions can be found on the Contra Costa webpage: <https://cchealth.org/mentalhealth/pdf/CANS-Training-Website-Instructions.pdf>
  - b. Complete the online training through the Praed website. Instructions are available here: <https://cchealth.org/mentalhealth/pdf/CANS-Online-ReCertification-Instructions.pdf>
2. When creating an account, ensure staff:
  - a. Select the correct agency followed by “- Contra Costa County”.
  - b. Enter their work email. **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.**
  - c. 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 with the correct information as directed above. To edit profile, once logged in, staff can hover over “Me” on the left hand corner and select “My Profile.” To change agencies, staff must email [support@schoox.com](mailto:support@schoox.com)*



3. Organizations may also choose to identify staff (i.e. clinical supervisor, program manager, and training director) to become “In-House” Agency CANS Trainers. These staff must attend a “Train-the Trainer” workshop led by Praed facilitators.

## ✓ CLIENT EPISODES: Only current client episodes will be transferred from ShareCare into OA

1. Client Episodes are current in ShareCare
  - a. Once in ShareCare go to Main Menu → Clinical Report → Admissions
  - b. Select the Caseload tab
  - c. Enter your facility and program information, and select “View Report”.
  - d. Organizational units are accurate (Only episodes with active OUs will be transferred into OA.)
  - e. Episodes are closed if appropriate
  - f. Primary Service Provider assigned is active

## ✓ STAFF & ORGANIZATIONAL UNITS: Active agencies and staff will be transferred from ShareCare into OA.

1.  At least two Administrative Users per agency have been identified. Admin Users will oversee OA implementation in their organization, including reviewing and editing staff and client data in the system.

Administrators may assign additional Administrator roles as needed.

2.  Update Organizational Structure and Staff User Spreadsheet
  - a. CCBHS will send out current organizational and staff information downloaded from ShareCare for each agency. If you haven't received yours by the end of December, please email [CANSPSC@cchealth.org](mailto:CANSPSC@cchealth.org)
  - b. Review and update the spreadsheet as needed. Ensure all program information is correct and staff are current.
  - c. In the staff tab, enter staff email addresses, OA Roles, professional suffixes, job titles and placements.
  - d. Send back the spreadsheet to the County for OA upload and processing.
  - e. After the initial OA launch, Administrators will be able to edit program and staff data in the system as needed

**Note: Once initial spreadsheet is submitted, any additional staff must be added by the Agency Administrator User in OA**

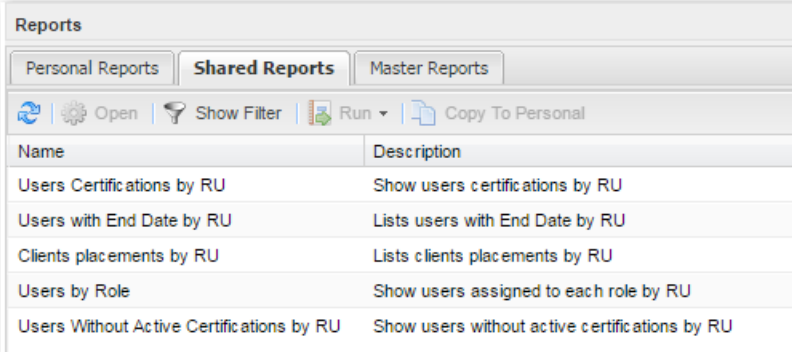
### OA-Production: TASKS IN OA PRODUCTION SITE:

<https://contra-costa.oasmr.com>

1.  System Administrator requested from CCBHS their password for OALive Production Site
2.  System Administrator logs into OA Live Production Site (<https://contra-costa.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 completed, then complete staff profiles.)
  - a. Verify or assign Roles in OA (Roles permit or restrict actions. See the OA Role Descriptions in the Appendix).
  - b. 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.
  - c. Verify or assign Placements = OU or Organization Unit (determines which set of clients and staff are available for viewing and writing. Users with organizations can see all, Users with only one OU can only see those clients or staff in that OU).
  - d. Verify/assign the email address. Use work e-mail (or whatever email was used to register for CANS certification on schoox.com).
  - e. Verify/assign Professional Suffix and Job Title.
  - f. For any staff not appearing (or missing) in OA, you must:
    - i. Check that the staff were included in the Staff User Spreadsheet sent to CCBHS.
    - ii. Staff may be added by System Administrators or by emailing the CCBHS Objective Arts Team at [CANSPSC@cchealth.org](mailto:CANSPSC@cchealth.org).
4.  **Ongoing new staff:** After initial OA setup, Administrators will be responsible for managing staff accounts including adding new staff, updating roles and placements, and deactivating accounts for inactive staff.
5.  System Administrator will 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.

6.  System Administrator has reviewed and verified staff CANS certifications in OA.
- a. A master list of certifications will be uploaded into OA after all staff accounts have been verified in the Production site. Afterwards, recent certifications will be automatically transferred into OA from schoox.com on an ongoing basis.
  - b. For any staff who are missing a certificate:
    - i. Verify that the staff has a current certificate from Schoox.com.
    - ii. If staff received their CANS certification prior to having an account created in OA, their certificate may not have transferred.
    - iii. System Administrator may add the certificate manually with the appropriate expiration date or email CCBHS.

**TIP: You can run the following reports in OA Production by clicking on the “Report” widget and look under “Shared Reports” to help troubleshoot staff needing updates/fixes**



The screenshot shows a 'Reports' widget with three tabs: 'Personal Reports', 'Shared Reports', and 'Master Reports'. The 'Shared Reports' tab is active. Below the tabs is a toolbar with icons for 'Open', 'Show Filter', 'Run', and 'Copy To Personal'. A table lists five reports with their names and descriptions.

Name	Description
Users Certifications by RU	Show users certifications by RU
Users with End Date by RU	Lists users with End Date by RU
Clients placements by RU	Lists clients placements by RU
Users by Role	Show users assigned to each role by RU
Users Without Active Certifications by RU	Show users without active certifications by RU

## OA Staff Training: LEARNING HOW TO ENTER DATA IN OBJECTIVE ARTS

1.  Objective Arts Champions/trainers are identified in the agency, including at least one for the Administrator training and one for the Clinician/Data Entry training.
2.  Champions/Trainers will participate in a live OA webinar scheduled through CCBHS and/or watch a recorded version of the webinar which can be obtained by emailing [CANSPSC@cchealth.org](mailto:CANSPSC@cchealth.org). Champions can also find additional OA training videos (**section below with descriptions of each tutorial**) at <https://www.youtube.com/channel/UCVIV8xpkIj4P1IOypNJ0nqw/playlists> and practice in the OA Training environment at <https://training-contra-costa.oasmr.com>.
3.  Champions/Trainers train agency staff to use the OA-SMR application in the OA Training environment at <https://training-contra-costa.oasmr.com>.
4.  **Optional:** Champions/Trainers share the Clinician User Tip sheet included in the Appendix. This is a quick reference guide on how to create CANS 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 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/UCVIV8xpkIj4P1IOypNJ0nqw/playlists>

Contra Costa 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/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](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 Contra Costa 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 Contra Costa County CANS. The general principles remain the same.

# Appendix

## Contra Costa County Objective Arts User Roles and Permissions

Role	Permissions
Data Entry	<ul style="list-style-type: none"><li>• Data entry in assigned org units (OUs).</li><li>• Does not need certification to enter CANS data</li></ul>
Clinician	<ul style="list-style-type: none"><li>• Restricted to designated OUs assigned by Agency Administrator</li><li>• Access to view CANS and reports for any client with an open episode in assigned OU(s), including CANS data entered by other OUs</li><li>• Enter and submit CANS as draft but must be approved by supervisor</li></ul>
Licensed Clinician	<ul style="list-style-type: none"><li>• Same as clinician but can approve their own assessments (licensed or waived staff)</li></ul>
Supervisor	<ul style="list-style-type: none"><li>• Same as clinician but must approve CANS for them to be finalized and has access to supervisor level reports</li><li>• Can produce reports for assigned OUs</li><li>• Can write/edit assessments</li><li>• Cannot revise finalized/submitted assessments</li></ul>
Administrator	<ul style="list-style-type: none"><li>• CBO user account setup (assigns CBO users to OUs, sets user roles within CBO)</li><li>• Upload data</li><li>• Client level access at agency level</li><li>• Can produce reports for entire agency</li><li>• Can edit finalized assessments</li></ul>
CCBHS Administrator	<ul style="list-style-type: none"><li>• Access to everything</li><li>• Assigns roles to CCBHS staff</li><li>• Produce county-wide reports</li></ul>

# OBJECTIVE ARTS CLINICIAN USER GUIDE

## System Administrator at your agency is:

Name(s) \_\_\_\_\_

Email(s) \_\_\_\_\_ Phone/Extension \_\_\_\_\_

### A. Logging in

Log in here: <https://contra-costa.oasmr.com> (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”

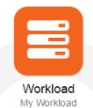
Objective Arts ToDo 0 Change Password Logout



- Forgot your password? Please request a reset from your CCBHS ([CANSPSC@cchealth.org](mailto:CANSPSC@cchealth.org)) or CBO System Administrator.
  - **Tip:** OA will ask you to reset your password every 90 days.

### C. Creating Assessments

The easiest way to create an assessment is to click on “Workload”


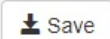
Here you will see a list of clients who are assigned to you.





- Double click on Client’s Name > Click **+ New Assessment** and the CANS or CANS 0-5 will auto appear based on your client’s age > Click on  > and begin
  - 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 
- Enter “**Org Unit**”: Enter the facility – program number for the client from the drop down list. Assessment won’t save if an OU is not chosen.
- Go to **Assessment Information** and choose from:
  - **Initial:** First due when opening case (within 60 days of Episode Opening Date)
  - **Reassessment:** At 6 month mark or Annual (due by the end of the 5<sup>th</sup> month for 6<sup>th</sup> month mark or 11<sup>th</sup> month for annual)

# OBJECTIVE ARTS CLINICIAN USER GUIDE

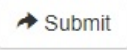

- **Update (Initial or Reassessment):** When you have already submitted an Initial or Reassessment but need to make changes to that prior assessment. This falls out of the “6 month” or “Annual” mark. Reasons for an update may include clinically significant changes that have occurred in client’s life. 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.”)
- **Discharge:** When discharge is planned with client and/or caregiver
- **Admin 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). In this case, you will complete the CANS to the best of your knowledge or copy data from the most recent CANS done with the client.

- If you are ready to **finalize and submit** the Assessment, hit  and refer to **Section E**.
- If you need to return to the Assessment and complete another day, hit  refer to **Section D**.

## D. Editing Assessment (i.e, once you’ve already hit once)

- You can access assessments “in progress” two ways:
  1. From the Dashboard/Home Page, click on **Workload**  **OR**
  2. 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  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\**

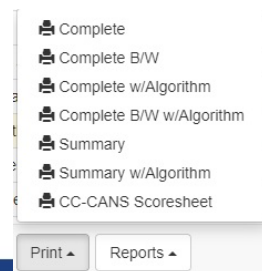
## E. Submitting Assessments

- If your “role” in OA is “Clinician”, your assessments must be approved before finalized and submitted. Hit 
- If your “role” in OA is a “Senior Clinician”, you will have the permissions to approve your own assessments. Hit 

*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:
- If sending to CCBHS UR, print the “CC-CANS Scoresheet”
  - Once printed, make sure to sign at the top with your credentials as you would a regular assessment.



CHILD AND ADOLESCENT NEEDS AND STRENGTHS (CANS) -- CONTRA COSTA			
CHECK ONE:	<input type="radio"/> Initial CANS	<input type="radio"/> Six Month CANS	<input type="radio"/> Annual CANS <input type="radio"/> Discharge CANS
Child's Name: Alabama, Aaron	Identifier: 345678919	Program: ProgramA2	
Date of Birth: 11/29/2012	Age: 6	Date Assessed: 11/08/2019	
Assessor's Name: Battis, Claire	Assmt Status: Assigned	Signature: _____	



# OBJECTIVE ARTS CLINICIAN USER GUIDE

## Helpful Hints about...

### Dashboard

To view Dashboard, hit Home at any time.

Home

### Entering Data

- ✓ Enter data by clicking on bubbles or using the **Tab** button on your keyboard to enter numbers
- ✓ Click on [Add Note](#) if you would like to enter narrative

### Extension Modules

- ✓ Extension Modules are **required if triggered by a score of 1, 2, or 3** on the corresponding core item. Leave these modules blank if the trigger item is scored 0. You will know which items trigger an extension module as they have a ('module abbreviation') next to them:

A screenshot of a web-based assessment interface. It shows a list of items under a 'Life Functioning' section. The items are: 9. Adjustment To Trauma (T-SS) \*, 10. Family Functioning \*, 11. Living Situation \*, 12. Social Functioning \*, 13. Developmental/Intellectual (DN) \*, 14. Decision Making \*, 15. School Behavior (SCH) \*, 16. School Achievement (SCH) \*, and 17. School Attendance (SCH) \*. Red arrows point to the asterisked abbreviations in items 9, 13, and 16.

### 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 work email (the email used to register on Schoox).
- ✓ 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.