

Objective Arts Training Manual

CONTRA COSTA COUNTY



CONTRA COSTA
BEHAVIORAL HEALTH

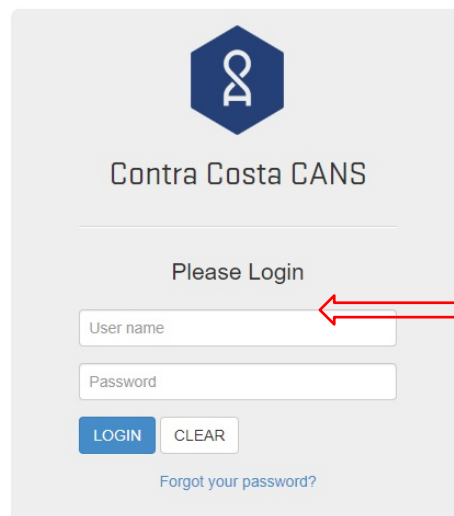
A Division of Contra Costa Health Services

Table of Contents

| | |
|---|-----------|
| Logging in to Objective Arts | 3 |
| Changing your Password | 4 |
| To Do List | 6 |
| Data Portal | 7 |
| <i>The Data Portal Toolbar</i> | 7 |
| Clients | 8 |
| <i>Clients List</i> | 8 |
| <i>Filtering the Clients List</i> | 9 |
| <i>Viewing the Workload</i> | 12 |
| <i>Adding a Client to Your Workload</i> | 12 |
| <i>Removing a Client from the Workload</i> | 13 |
| Assessments | 14 |
| <i>Assessment List</i> | 14 |
| <i>Adding an Assessment</i> | 15 |
| <i>Assessment Data Entry</i> | 19 |
| <i>Assessment Toolbar</i> | 24 |
| <i>Side Panel</i> | 25 |
| <i>Validation Errors</i> | 26 |
| <i>Accessing an Assessment</i> | 28 |
| <i>Creating Individual Assessment Reports</i> | 30 |
| Assessment Approval | 32 |
| <i>Sequential Approve</i> | 33 |
| <i>Batch Approve</i> | 34 |
| Logging Out | 37 |

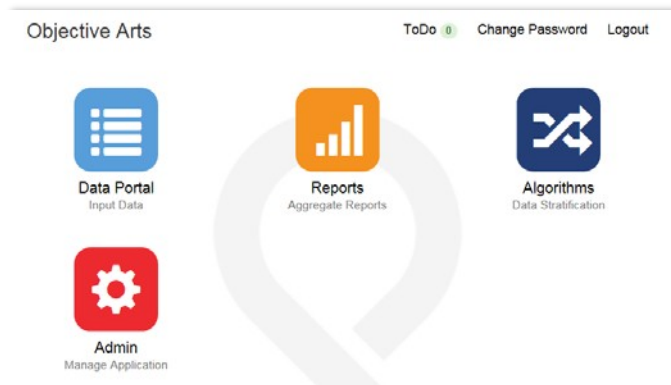
Logging in to Objective Arts

1. **Log on to Objective Arts at: <https://contra-costa.oasmr.com>**
 - Your user name is your employee email. If you need to change your username, you must contact your designated Objective Arts (OA) Champion or Administrative User.
 - OA Champions are the point persons for all OA related questions for your agency's staff. They will help staff with logging in, entry issues, etc. Champions will be your agency's designated persons to contact CCBHS with Objective Arts related questions and issues that they are unable to help staff with.
 - If logging in for the first time, you will get an activation email with a link that will direct you to create a password.
2. **Passwords are case sensitive. Enter the password exactly as it was given to you.**



Your username will always be your email.

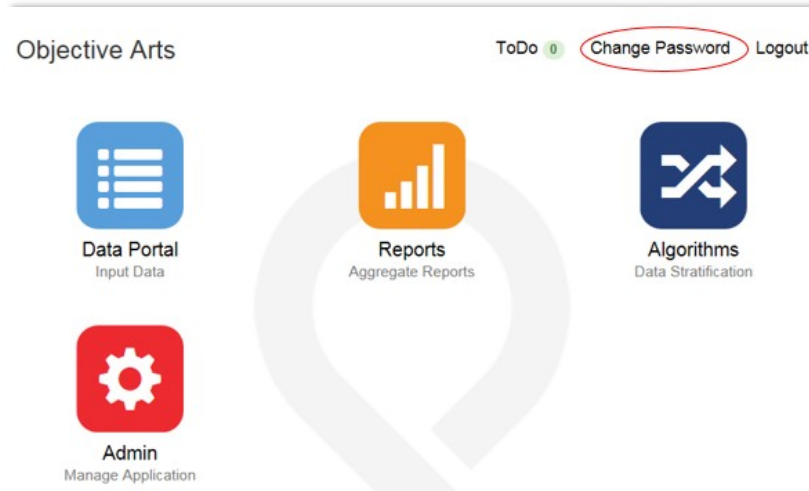
After logging in, the following screen appears. This screen is referred to as the **Home Screen**. The options shown on this screen will depend on your role in Objective Arts



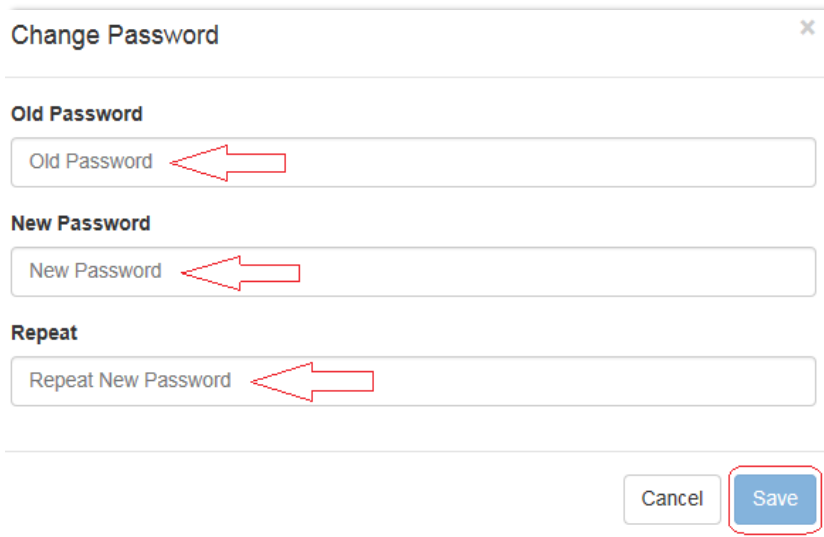
Changing your Password

The first time you log in, best practices direct you to change your password, but you will not be prompted to do so. To change your password, you will need to be at the **Home screen**.

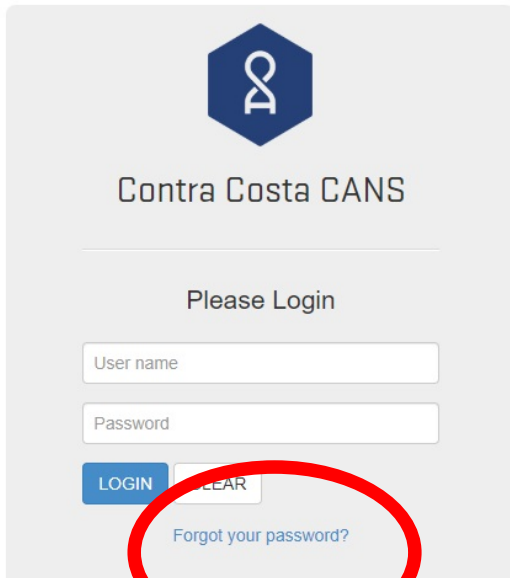
1. Click on the **Change Password** link at the top right of the page.



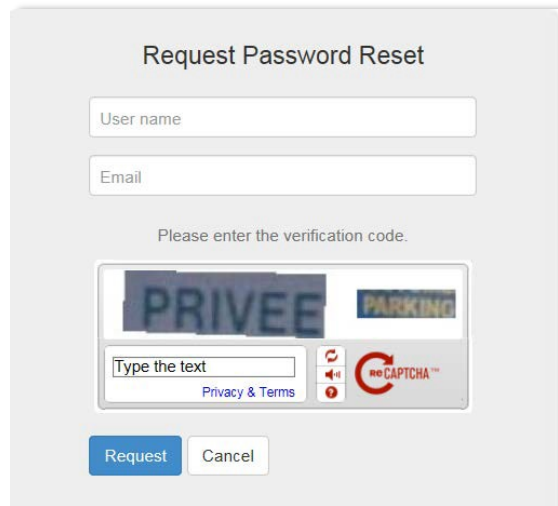
2. Enter your old password.
3. Next enter your new password
 - Passwords must be at least seven characters in length, include at least one number and one capital letter.
 - Repeat the new password.
4. Click Save.

A screenshot of the 'Change Password' dialog box. It has a title bar with 'Change Password' and a close button. The dialog contains three input fields: 'Old Password', 'New Password', and 'Repeat New Password'. Red arrows point to each of these fields. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red border.

5. Forgot your password - Request Password Reset



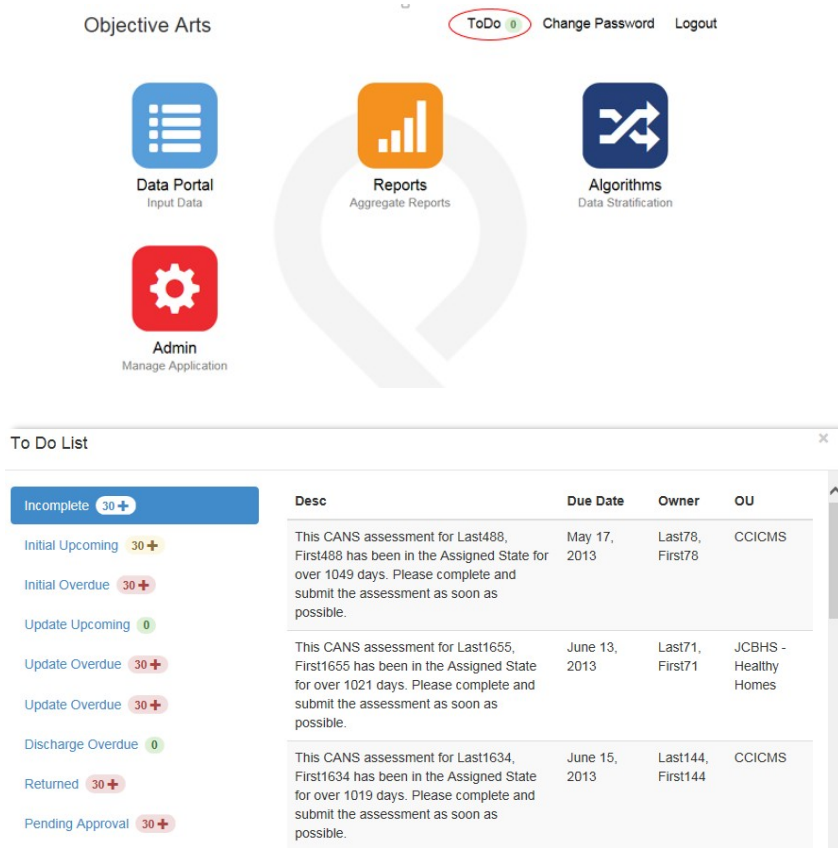
The image shows the login page for Contra Costa CANS. At the top is a blue hexagonal logo with a white stylized 'A' and 'C' inside. Below the logo is the text 'Contra Costa CANS'. Underneath is a horizontal line, followed by the text 'Please Login'. There are two input fields: 'User name' and 'Password'. Below these fields are two buttons: a blue 'LOGIN' button and a white 'CLEAR' button. At the bottom of the form is a blue link that says 'Forgot your password?'. This link is circled in red.



The image shows the 'Request Password Reset' form. At the top is the title 'Request Password Reset'. Below the title are two input fields: 'User name' and 'Email'. Underneath these fields is the text 'Please enter the verification code.'. There is a CAPTCHA image showing the words 'PRIVEE' and 'PARKING' in a distorted font. Below the CAPTCHA image is a text input field with the placeholder 'Type the text'. To the right of the text input field are three icons: a refresh icon, a volume icon, and the reCAPTCHA logo. Below the CAPTCHA section is a blue 'Request' button and a white 'Cancel' button.

To Do List

1. From the Home screen, click ToDo.



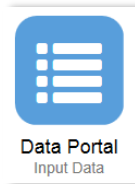
- This screen functions as your OA inbox of notifications; making you aware of the assessments that are incomplete, upcoming, overdue, returned or pending approval (if you are a clinical supervisor).

- ✓ **Initial Upcoming:** Lists the Initial assessments due within 30 days.
- ✓ **Initial Overdue:** Lists the Initial assessments that are overdue.
- ✓ **Reassessment Upcoming:** Lists the Reassessments due within 30 days.
- ✓ **Reassessment Overdue:** Lists the assessments 90 days or more overdue.
- ✓ **Discharge Overdue:** Lists the outstanding discharge assessments for which you, in the OA Clinical Staff role, are responsible. If you are in the OA role of Supervisor or above, you will see the outstanding discharge assessments for all of the Clinical Staff in the OU(s) for which you are responsible.
- ✓ **Returned:** Lists the assessments returned to the Clinical Staff by the Supervisor.
- ✓ **Pending Approval:** For OA roles of Supervisor and above; lists the assessments submitted by Clinical staff, awaiting approval.

2. Click on a client description (Desc) and the assessment will open. You will then be able to create, edit, submit, or approve the assessment.

Data Portal

1. From the Home screen, click Data Portal.



After clicking on Data Portal, you will see the following:

A screenshot of the Data Portal interface showing a "Clients List" table. The table has columns for "Identifier", "Name", and "Date of birth". There are five rows of data, each with a checkbox in the first column. The table is part of a larger interface with a navigation bar at the top and a search filter on the right.

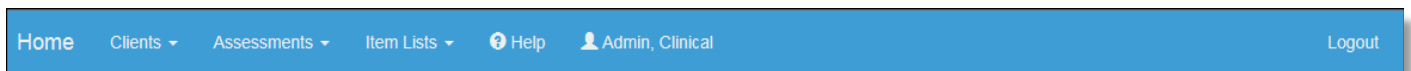
| Identifier | Name | Date of birth |
|--------------------------|---------------------------|--------------------|
| <input type="checkbox"/> | null, null | May 23, 2005 |
| <input type="checkbox"/> | Last1000015, First1000015 | November 12, 1996 |
| <input type="checkbox"/> | Last1000260, First1000260 | December 18, 1994 |
| <input type="checkbox"/> | Last1001477, First1001477 | May 11, 1994 |
| <input type="checkbox"/> | Last1002090, First1002090 | September 11, 1996 |

**Please Note: In the actual Production site the menu bar will be blue. While we will try to present screen shots from the Production site for familiarity of the site, in order to show only de-identified information in this training manual, at times the menu bars will show as orange or red, as they appear in the training site.*

Depending on your browser settings, you may see a security bar at the bottom of the screen that states, "Only secure content is displayed." If so, and you are working on a non-public computer, click "Show all content".



The Data Portal Toolbar



- ✓ **Home:** allows you to return to the Home screen.
- ✓ **Clients:** this drop-down menu offers a choice between viewing a Clients List and viewing client workload.
- ✓ **Assessments:** this drop-down menu is the way to navigate to a list of client assessments or to view assessments in need of approval.
- ✓ **Help:** the help button will open the Objective Arts Wiki on a new tab.
- ✓ **Logout:** after having entered the desired data, end the session by clicking this link on the top right of the screen. In addition, close your browser after your OA session.

Clients

Clients List

This screen is a list of the clients who have an active placement in the OU(s) assigned to you in OA (the list will likely include more clients than your individual workload). This list may be sorted by three categories: Identifier (MRN), Name (last, first), or Date of birth.

Please note: Clients are added to OA via automated ShareCare batch upload which occurs daily.

| Clients List | | | Start typing a last name | Show Filter | Refresh |
|----------------------------------|---------------------------|-------------------|--------------------------|-------------|---------|
| Identifier ↑↓ | Name ↓↑ | Date of birth ↑↓ | | | |
| <input type="checkbox"/> | null, null | May 23, 2005 | | | |
| <input type="checkbox"/> | null, null | December 4, 1996 | | | |
| <input type="checkbox"/> 1000015 | Last1000015, First1000015 | November 12, 1996 | | | |
| <input type="checkbox"/> 1000260 | Last1000260, First1000260 | December 18, 1994 | | | |

- To sort the information, click on the category (or arrow next to it) to arrange the set:**
 - By default, the list is sorted by Name (alphabetically A-Z)
 - Identifier (from lowest to highest OR highest to lowest).
 - Name (alphabetically A-Z or Z-A).
 - Date of birth (oldest to youngest OR youngest to oldest).
- To view information for a client, click on the row (the bars are colored faint gray or white) where the client's information appears.**
 - This gives you information about the client's assessments, their ID numbers, dates, and status.

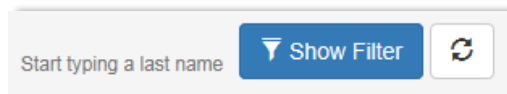
After you click on a client, the Assessments List will appear:

| Assessments List for Last1000015, First1000015 | | | | | Start typing a last name | Show Filter | Refresh |
|---|---------------|---------------------------|-------------------|---|--------------------------|-------------|---------|
| ID ↑↓ | Instrument ↑↓ | Client Name ↑↓ | Date ↓↑ | Status ↑↓ | | | |
| <input type="checkbox"/> 86693 | CANS | Last1000015, First1000015 | November 14, 2014 | Approved by WOLKENHAUER, DIANNE on 01/02/2015 | | | |
| <small>Assessor: HARRIS, JENNIFER Reporting Unit: CCICMS (36811)</small> | | | | | | | |
| <input type="checkbox"/> 81930 | CANS | Last1000015, First1000015 | October 30, 2014 | Approved by Wilkinson, Lysane on 11/10/2014 | | | |
| <small>Assessor: Johnson, Gregory Reporting Unit: EVC - CHRIS (36B71)</small> | | | | | | | |
| <input type="checkbox"/> 74318 | CANS | Last1000015, First1000015 | September 3, 2014 | Approved by Wilkinson, Lysane on 10/03/2014 | | | |
| <small>Assessor: Johnson, Gregory Reporting Unit: EVC - CHRIS (36B71)</small> | | | | | | | |
| <input type="checkbox"/> 77412 | CANS | Last1000015, First1000015 | July 22, 2014 | Approved by WOLKENHAUER, DIANNE on 10/09/2014 | | | |
| <small>Assessor: HARRIS, JENNIFER Reporting Unit: CCICMS (36811)</small> | | | | | | | |

You can sort this list by clicking on the arrows next to each column header. By default, this list is sorted by Date from most recent to oldest (e.g.: newest at the top). Also, you can filter this list if you know specific information about the client.

Filtering the Clients List

1. On the top grey bar, to the right, in your “Clients List” window, you will see the following:



2. If you begin typing a last name the list will automatically narrow to include clients with only the last name you typed.

- Press the Esc key on your keyboard to go back to the default Clients List Or you can:

3. Click the blue Show Filter button at the top right of the screen. The filter section will open and you can narrow the Clients List by entering any of the information requested.

Please note: It is NOT necessary to enter information in all of the search boxes. You may enter as much or as little information as you wish to narrow the list. Once filtered, the “Show Filter” button turns green.

- ✓ **Identifier:** to locate client if you know the client’s Identifier (MRN). Partial Information may be used.
- ✓ **Date of Birth:** to locate client with a specific date of birth (e.g. 03/14/2015)
- ✓ **First Name:** to locate clients by first name. Partial information may be used.
- ✓ **Last Name:** to locate clients by last name. Partial information may be used.
- ✓ **Active Only:** This box is checked by default and only returns clients who are active to the OU(s) you are placed in, in OA. Unchecking this box will return a list of clients active and inactive who are or were placed in your OU(s).
- ✓ **Placement Status:** to filter by clients open to others or closed. Default is “Placed - open to me”.
- ✓ **Organizational Unit:** to locate clients by one or more reporting units (OUs) assigned to you in OA (this is only useful if you have more than one OU assigned to you). To Filter by OU: Click the magnifying glass. The plus/minus icons allow you to expand or collapse the list. Click the OU you want to filter by and drag it to the empty white box to the right of the OU list. When this box turns green, “drop” the OU selection into the box, click Apply. You can drag more than one RU into this box. An RU can be deleted from this box by clicking the “X” to the right of the RU.

- ✓ **Tags:** Tags are not in use at this time.
- ✓ **AssessorID:** Opens the Assessor List where you can filter for assessor.

4. Once you have entered parameters, click Filter, or press the Enter key on your keyboard and your Clients List will now be narrowed by your filter selection(s).

Clients List

Start typing a last name Hide Filter Refresh

Identifier

Date of Birth

First Name

Last Name

Active Only

Placement Status

Organizational Unit(s)

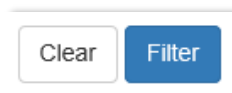
Reporting Unit(s)

Assessorid

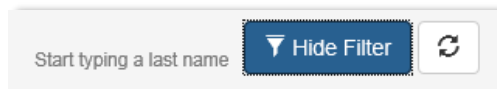
Clear Filter

Additional key information about the filter function:

- ✓ You will know whether a filter is operating based on the color of the filter button. When the Clients List has been filtered, the Show Filter button will be Green (Blue = list not filtered; Green = list filtered).
- ✓ To edit a filter, re-open the filter section and change the parameters. Click the blue Filter button on the bottom right to apply the new filter criteria to your data.
- ✓ The Clear button (to the immediate left of the Filter button) removes all of the filters and returns your list back to the default settings.



- ✓ The refresh button in the upper right corner (immediately right of the Hide Filter button) adds to your list any new data that may have uploaded to the system since your last search with similar parameters.



- ✓ For the identifier, first name, and last name search boxes, entries do not need to be complete ID numbers or words. For example, a search can run using only the first three numbers in a client ID (e.g., "012") to yield a list of clients with the numbers "012" somewhere in the client ID.

Viewing the Workload

Your workload is automatically populated based on the caseload report in ShareCare.

However, should you need to add a client to your workload:

1. To view your workload click **Clients** on the top menu bar, and then **Workload** from the drop-down items.



| Clients List | | | Start typing a last name | Show Filter | Refresh |
|--------------------------|----------|-------------------------|--------------------------|-------------|---------|
| Identifier ↓↑ | Name ↓↑ | Date of birth ↓↑ | | | |
| <input type="checkbox"/> | Id100000 | Last100000, First100000 | February 10, 2006 | | |
| <input type="checkbox"/> | Id100003 | Last100003, First100003 | April 24, 2012 | | |
| <input type="checkbox"/> | Id100005 | Last100005, First100005 | March 2, 2007 | | |

Adding a Client to Your Workload

1. In the Clients List, check the box(es) next to the Identifier of the client(s) you wish to add to your workload. Click the Add to Workload button at the bottom right of the screen.
2. To add a client to your workload, navigate to the Client List.

| Clients List | | | Start typing a last name | Show Filter | Refresh |
|-------------------------------------|----------|-------------------------|--------------------------|-------------|---------|
| Identifier ↓↑ | Name ↓↑ | Date of birth ↓↑ | | | |
| <input checked="" type="checkbox"/> | Id100000 | Last100000, First100000 | February 10, 2006 | | |
| <input checked="" type="checkbox"/> | Id100003 | Last100003, First100003 | April 24, 2012 | | |
| <input checked="" type="checkbox"/> | Id100005 | Last100005, First100005 | March 2, 2007 | | |

Removing a Client from the Workload

When the case is closed in ShareCare, it will be automatically removed from your OA workload.

However, should you need to manually remove a client from your workload:

1. Navigate to the Clients List.
2. On the toolbar at the top, click Clients and then Workload from the drop-down items.



3. Check the box(es) next to the identifier of the client you are removing and click the red Remove from Workload button at the bottom right of your screen.

Clients List Start typing a last name Show Filter Refresh

| | Identifier ↑↓ | Name ↓↑ | Date of birth ↑↓ |
|-------------------------------------|---------------|-------------------------|-------------------|
| <input type="checkbox"/> | Id100000 | Last100000, First100000 | February 10, 2006 |
| <input type="checkbox"/> | Id100003 | Last100003, First100003 | April 24, 2012 |
| <input checked="" type="checkbox"/> | Id100005 | Last100005, First100005 | March 2, 2007 |

Remove from Workload

Assessments

Assessment List

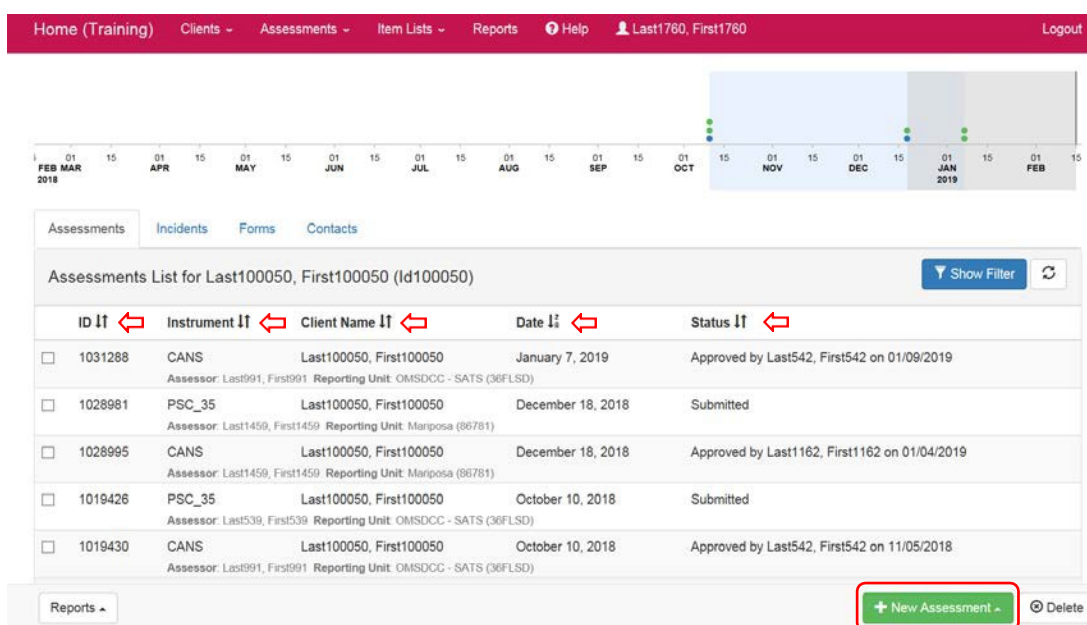
1. From the Home screen, click Data Portal
2. From the Data Portal Toolbar, click the Assessments option from the top Menu Bar and select List from the drop-down menu

| ID | Instrument | Client Name | Date | Status |
|--|------------|-----------------------|-------------------|-----------|
| <input type="checkbox"/> 1026970 | PSC_35 | Last93762, First93762 | December 13, 2018 | Submitted |
| <small>Assessor: Lockman, Brenda Reporting Unit: SCCS - SATS-Cln (36GNE)</small> | | | | |
| <input type="checkbox"/> 1026982 | CANS | Last99781, First99781 | December 13, 2018 | Submitted |
| <small>Assessor: Ondricka, Else Reporting Unit: Vista Community Counseling (36901)</small> | | | | |
| <input type="checkbox"/> 1027001 | ANSA | Last76698, First76698 | December 13, 2018 | Submitted |
| <small>Assessor: Hauck, Kamryn Reporting Unit: SCCS - GMH - Chino (36171)</small> | | | | |
| <input type="checkbox"/> 1027006 | ANSA | Last99578, First99578 | December 13, 2018 | Assigned |
| <small>Assessor: Hauck, Abner Reporting Unit: VCSSW - TAY (36DZ1)</small> | | | | |

3. To sort the information, click on the category (or arrow next to it) to arrange the set by:
 - a. ID: The assessment ID.
 - b. Instrument: the type of assessment.
 - c. Client Name: (alphabetically A-Z or Z-A).
 - d. Date: by default, the list is sorted newest to oldest.
 - e. Status: the status of the assessment. (e.g., assigned, submitted or approved).

Adding an Assessment

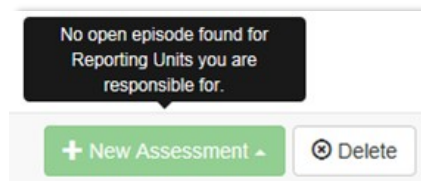
1. From the Home screen, click Data Portal.
2. Click on the client name for which you would like to create a new assessment. Or filter for the client and then click on the client's name.
 - You will navigate to the client's assessments screen. This screen may contain assessment information for the client, if there are assessments in OA for the client (see below). If there are no assessments in OA for the client, it will return "No data found!". The assessments may be sorted by ID number, the Instrument, Client Name, Date, and Status.



The screenshot shows the 'Assessments List for Last100050, First100050 (Id100050)'. At the top, there is a navigation bar with 'Home (Training)', 'Clients', 'Assessments', 'Item Lists', 'Reports', 'Help', and a user profile 'Last1760, First1760'. Below the navigation bar is a calendar view for the year 2019, with a green dot indicating an assessment on January 15, 2019. The main content area shows a table of assessments with columns for ID, Instrument, Client Name, Date, and Status. The table contains five rows of assessment data. At the bottom right of the table, there is a green button labeled '+ New Assessment' and a grey button labeled 'Delete'.

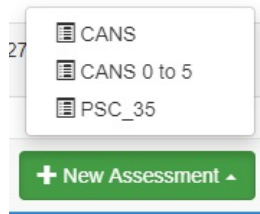
| ID | Instrument | Client Name | Date | Status |
|---------|------------|-------------------------|-------------------|---|
| 1031288 | CANS | Last100050, First100050 | January 7, 2019 | Approved by Last542, First542 on 01/09/2019 |
| 1028981 | PSC_35 | Last100050, First100050 | December 18, 2018 | Submitted |
| 1028995 | CANS | Last100050, First100050 | December 18, 2018 | Approved by Last1162, First1162 on 01/04/2019 |
| 1019426 | PSC_35 | Last100050, First100050 | October 10, 2018 | Submitted |
| 1019430 | CANS | Last100050, First100050 | October 10, 2018 | Approved by Last542, First542 on 11/05/2018 |

3. Once on the assessments list, click the green New Assessment button at the bottom right of the screen.
 - The New Assessment button will not be available for use if the client is not active to your placements, OU(s), in OA. If you hover over the New Assessment button, you will receive the following message:



**Note that you will not be able to do a CANS assessment if you're a clinician/supervisor user and you do not have a valid CANS certification in Schoox.*

4. Upon clicking the **New Assessment** button, several assessment types will be listed.
 - Assessment types will display, choose the appropriate assessment.



- As seen above, there are several assessments to choose from. In this section the CANS is used as the example on how to complete an assessment. The skills/practices learned here are similarly applied to all assessments.
- After selecting the assessment type, the General Information page of the assessment will display. This page includes the Client ID number, Client Name, Date of Birth, and Client Gender.

Home (Training) Clients ▾ Assessments ▾ Item Lists ▾ Reports Help 👤 Battis, Claire Logout

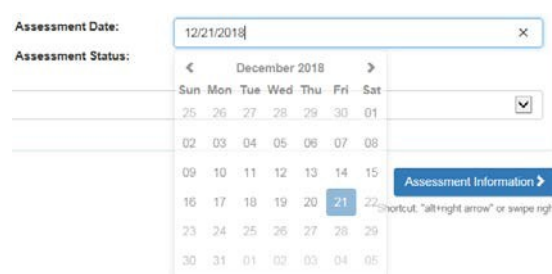
CANS (NEW) - Atlanta, Camille

| | | | |
|----------------|------------------------|--------------------|------------------|
| Client ID: | 902912345 | Date of Birth: | December 9, 2012 |
| Client Name: | Atlanta, Camille | Client Gender: | FEMALE |
| Assessment ID: | | Assessment Date: | 11/13/2019 |
| Assessor: | Battis, Claire | Assessment Status: | |
| Entered by: | | | |
| Org Unit: | Program C2 (ProgramC2) | | |
| Tags: | none | | |

Be sure that the **Client ID, Date of Birth, Client Name, and Client Gender** are correct for the client that is being assessed.

- ✓ **Assessment ID:** The Assessment ID will auto-generate after the assessment is complete and has been saved.
- ✓ **Assessment Date:** The assessment date is the date that the assessment was performed, *not the date that it is entered*. This field defaults to the current date. If the current day's date is not the date of the client's assessment, be sure to change this date to the correct date of assessment.

5. To edit the date the assessment was done, click in the **Assessment Date** field and select the correct date.



✓ **Assessor:** This field must reflect the therapist who performed the assessment, *NOT* the person entering the data.

6. If the assessor needs to be edited, click on the name that is in the Assessor field. This will open the Edit assessor dialog box.

CANS (NEW) - Last100000, First100000

Client ID: Id100000 Date of Birth: February 10, 2006
Client Name: Last100000, First100000 Client Gender: MALE
Assessment ID: [Edit Assessor] ← Assessment Date: 12/21/2018
Assessor: Conroy, Johnny Assessment Status:
Entered by:
Rpt Unit: Vista Community Counseling (36901)
Tags: none

7. The list can be filtered by one or more fields. Click Show Filter and choose from the available options.

Assessors [Hide Filter] [Refresh]

ID: Assessor internal ID Login: Assessor Login
Last: Assessor Last Name First: Lura
[Clear] [Filter]

| ID ↑ | Last Name ↓ | First Name ↓ |
|------|-------------|--------------|
| 174 | Abbott | Jerrod |
| 416 | Abbott | Willow |

8. Click on the row listing the assessor's name.

Edit assessor [Close]

Assessors [Show Filter] [Refresh]

| Login ↑ | Last Name ↓ | First Name ↓ |
|---------|-------------|--------------|
| 7810 | Schaefer | Billy |

[Load more]

CANS (NEW) - Last100000, First100000

Client ID: Id100000 Date of Birth: February 10, 2006
Client Name: Last100000, First100000 Client Gender: MALE
Assessment ID: Assessment Date: 12/21/2018
Assessor: Schaefer, Billy Assessment Status:
Entered by:
Rpt Unit: Vista Community Counseling (36901)
Tags: none

**Note the change in the assessor name*

- ✓ **Org Unit:** The Organizational Unit will pre-fill if the client is placed and open to only one OU. If the client is placed and open to two or more OUs and the assessor is placed in the same two or more OUs, the Org Unit field will be blank. If this field is blank, the correct OU must be selected.

9. Click in the empty Org Unit field.

CANS (NEW) - Last429, First429

| | | | |
|--------------------------|--|--------------------|--------------------|
| Client ID: | Id429 | Date of Birth: | September 28, 2001 |
| Client Name: | Last429, First429 | Client Gender: | FEMALE |
| Assessment ID: | | Assessment Date: | 12/21/2018 |
| Assessor: Entered by: | Greenfelder, Stephania | Assessment Status: | |
| Rpt Unit: | INFO (36DK1) Mesa Counseling Services (36911) | | |
| Tags: | | | |

← Vocational (VOC) Module Assessment Information →

Shortcut: "alt+left arrow" or swipe left Shortcut: "alt+right arrow" or swipe right

10. Select the correct OU.

CANS (NEW) - Last429, First429

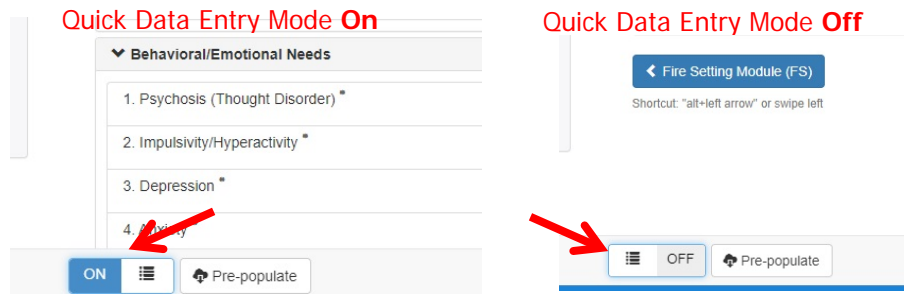
| | | | |
|--------------------------|----------------------------------|--------------------|--------------------|
| Client ID: | Id429 | Date of Birth: | September 28, 2001 |
| Client Name: | Last429, First429 | Client Gender: | FEMALE |
| Assessment ID: | | Assessment Date: | 01/02/2019 |
| Assessor: Entered by: | Greenfelder, Stephania | Assessment Status: | |
| Rpt Unit: | Mesa Counseling Services (36911) | | |
| Tags: | none | | |

**Important: A reporting unit must be selected in order to save and submit the assessment for approval.*

Assessment Data Entry

All fields marked with an asterisk are mandatory and must be completed.

There are two ways to do an assessment in Objective Arts. The default mode is **“Quick Data Entry Mode”**. When this is set to **“On”**, you see all of the items at once. When this is set to **“Off”**, you only see one module at a time. You can find the mode button on the bottom left hand side of the screen.



1. To navigate through the assessment in **“Off”** mode, click on the blue routing buttons with white arrows in the direction you wish to go.

The screenshot shows the assessment form for "CANS (NEW) - Last429, First429". The form contains the following fields: Client ID: Id429; Client Name: Last429, First429; Date of Birth: September 28, 2001; Client Gender: FEMALE; Assessment ID: (empty); Assessment Date: 12/21/2018; Assessor: Greenfelder, Stephania; Entered by: (empty); Rpt Unit: Mesa Counseling Services (36911); Tags: none. At the bottom of the form, there are two blue buttons with white arrows: "Vocational (VOC) Module" (with shortcut: alt+left arrow or swipe left) and "Assessment Information" (with shortcut: alt+right arrow or swipe right).

2. To complete most fields in the assessment quickly, you can use the Pre-populate feature by clicking the Pre-populate button on the bottom toolbar of your screen.



- This will populate the new assessment with the information from the last approved assessment.

- If there are approved assessments in OA for this client, a list of assessments will appear from which you can choose to prepopulate your assessment. *Please note: the approved assessments listed for the client may not be assessments completed by you or for your program. If this is the case, you can dismiss this option by selecting the "x" in the top, right corner.*

| Pre-populate Required Fields Only: <input type="checkbox"/> | | | |
|---|--------------------------|-------------------|----------|
| Date | Org Unit | Reason | Status |
| 2017-06-27 | Mesa Counseling Services | Update | Approved |
| 2017-06-30 | Mesa Counseling Services | Planned Discharge | Approved |
| 2016-05-03 | Mesa Counseling Services | Initial | Approved |
| 2016-12-02 | Mesa Counseling Services | Update | Approved |

3. You have the option to toggle Quick Data Entry Mode in the bottom left of the screen:



- If you choose to use "Quick Data Entry Mode", a screen will appear where each domain and module can be seen on the same page. In this mode, you will tab through the page to complete the assessment fields, instead of navigating through separate screens.

CANS (NEW) - Last1236, First1236

Client ID: 1236 Date of Birth: July 1, 2000
 Client Name: Last1236, First1236 Client Gender: FEMALE
 Assessment ID: Assessment Date: 04/13/2015
 Assessor: Assessment Status:
 Org Unit: JCBHS - Healthy Homes (36D31)
 Tags: none

Assessment Information

Reason for assessment: * Add Note

If reason for assessment is "Major Life Event", please specify: Add Note

Caregiver Section(s)

1. Caregiver section(s) does not apply at this time Add Note

Life Domain Functioning

2. Family * Add Note

3. Living Situation * Add Note

4. Social Functioning * Add Note

5. Recreational * Add Note

6. Developmental * Add Note

4. Turn off the “Quick Data Entry Mode” by clicking the same button, which will now look like this:



5. Choose an Assessment Type.

CANS (NEW) - Amsterdam, Derick

| | | | |
|----------------|------------------------|--------------------|--------------|
| Client ID: | 767574737 | Date of Birth: | June 6, 2000 |
| Client Name: | Amsterdam, Derick | Client Gender: | MALE |
| Assessment ID: | | Assessment Date: | 11/25/2019 |
| Assessor: | Battis, Claire | Assessment Status: | |
| Entered by: | | | |
| Org Unit: | Program D1 (ProgramD1) | | |
| Tags: | none | | |

▼ Assessment Information

Assessment Type *

If reason for assessment is Update, describe:

▼ Behavioral/Emotional Needs

Initial
Reassessment
Discharge
Administrative Discharge

6. Initials should be completed at the start of treatment, reassessments every 6 months thereafter, and at discharge. If you need to go back and update a CANS or PSC-35 outside of these timeframes due to a major life event or change in treatment, please describe the reason for the update in the subsequent text box.

If reason for assessment is Update, describe:

There are three options for entering the data:

- ✓ You can enter numbers 0,1,2,3 in the empty boxes from your keyboard. Press the tab key on your keyboard to move to the next box to be filled.
- ✓ If Quick Data Entry Mode is “Off”, you can select one of the bubbles from the existing options of 0,1,2,3 for each category with the click of the mouse.
- ✓ You can select Pre-populate scores from a previously approved assessment.

- Notice in the screen shot below that scores requiring action generate background color-coding that matches the severity of the score. (2 = yellow; 3 = red).

| Behavioral/Emotional Needs | | |
|----------------------------------|--------------------------------|--------------------------|
| 1. Psychosis/Thought Disorder * | <input type="text" value="0"/> | Add Note |
| 2. Impulsivity/Hyperactivity * | <input type="text" value="1"/> | Add Note |
| 3. Depression * | <input type="text" value="2"/> | Add Note |
| 4. Anxiety * | <input type="text" value="3"/> | Add Note |
| 5. Oppositional * | <input type="text" value="0"/> | Add Note |
| 6. Conduct * | <input type="text" value="1"/> | Add Note |
| 7. Anger Control * | <input type="text" value="2"/> | Add Note |
| 8. Substance Use (SUD) * | <input type="text" value="3"/> | Add Note |
| 9. Adjustment To Trauma (T-SS) * | <input type="text"/> | Add Note |

- 7. Continue through the assessment completing all required items (marked with an asterisk*). Only complete the supplemental/ extended modules at the end if the corresponding core item is scored higher than a 0:**

| Core Item (must be completed) | Extended Module (only complete if core item >0) |
|--------------------------------------|--|
| 8. Substance Use (SUD) | Substance Use Module (SUD) |
| 9. Adjustment to Trauma (T-SS) | Trauma Module – Traumatic Stress Symptoms (T-SS) |
| 13. Developmental/ Intellectual (DN) | Developmental Disabilities Module (DN) |
| 15. School Behavior (SCH) | School Module (SCH) |
| 16. School Achievement (SCH) | School Module (SCH) |
| 17. School Attendance (SCH) | School Module (SCH) |
| 24. Danger to Others (VM) | Violence Module (VM) |
| 25. Sexual Aggression (SAB) | Sexually Aggressive Behavior Module (SAB) |
| 26. Delinquent Behavior (JJ) | Juvenile Justice Module (JJ) |
| 27. Runaway (RM) | Runaway Module (RM) |
| 29. Fire Setting (FS) | Fire Setting Module (FS) |
| T1. Sexual Abuse (T-SA) | Trauma Module – Sexual Abuse Expansion (T-SA) |

8. If at any time, you would like to add a note to one of the items, click the Add Note button.

| Life Functioning | | |
|--------------------------|---|----------|
| 10. Family Functioning * | 1 | Add Note |
| 11. Living Situation * | 0 | Add Note |
| 12. Social Functioning * | 1 | Add Note |

9. A text box will open. Enter your note.

Note for Social Functioning

Cancel Apply

10. Click Apply.

11. Once you reach the Caregiver Resources and Needs section, you will see an option to select "Caregiver section(s) does not apply at this time". If the client has no known caregiver or the caregiver is not involved, you will check this box and skip the rest of this section. If the box is left unchecked, you will be required to complete the Caregiver Resources and Needs module.

| Caregiver Resources and Needs | | |
|--|--------------------------|----------|
| 42. Caregiver section(s) does not apply at this time | <input type="checkbox"/> | Add Note |
| 43. Caregiver Name | <input type="text"/> | Add Note |
| 44. Supervision | <input type="text"/> | Add Note |
| 45. Involvement With Care | <input type="text"/> | Add Note |
| 46. Knowledge | <input type="text"/> | Add Note |

12. Once you have completed all required domain items and modules, click the Save button located at the bottom right of the screen.

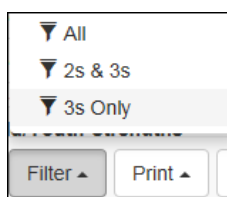
Cancel Save

Assessment Toolbar

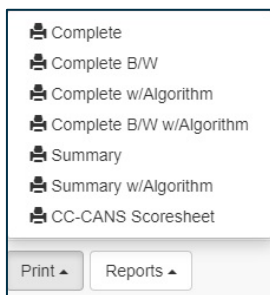
After the assessment has been saved for the first time (and thereafter) you will see a toolbar along the bottom of the screen. The options (buttons) shown below vary depending on your Objective Arts role.



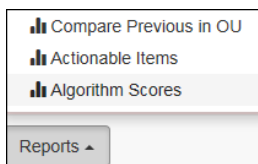
- ✓ **+/- Icons:** the plus/minus icons on the far left of the bar allow you to expand or collapse the domains and modules in the assessment. Selecting the plus will show each individual domain/module items. Selecting the minus will only show the domain and module headings.
- ✓ **Filter:** allows you to filter by assessment scores. For example, you can filter to show assessment scores of "2s & 3s" or for "3s only".



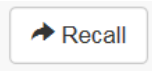
- ✓ **Print:** The print options (shown below) allow you to print the assessment in various forms. You can print a complete version that is color-coded or black and white that looks like the version shown after an assessment has been saved in OA. The Summary print version is a shortened assessment report that shows only the domain and module names color coded to match the highest reported assessment score (1 - yellow, 2 - orange, 3 - red). The reports with algorithm scores print options display the count of 2's & 3's of Core Needs Actionable Items. The CC-CANS Scoresheet is the version that is required for UR. *Please note: each document will open in a new window of your browser.*



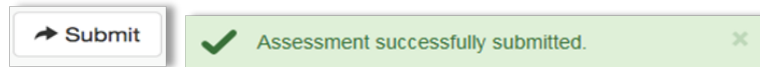
- ✓ **Reports:** The Compare Previous in OU report is a report that compares the current assessment with any previous assessment scores in the OU for the client. The Actionable Items report shows only those items with scores of 2 or 3. The Algorithm Scores show a summary of the Actionable Items scores. *Please note: each report will open in a new window of your browser.*



- ✓ **Recall:** The Recall button allows you to recall an assessment prior to its approval.



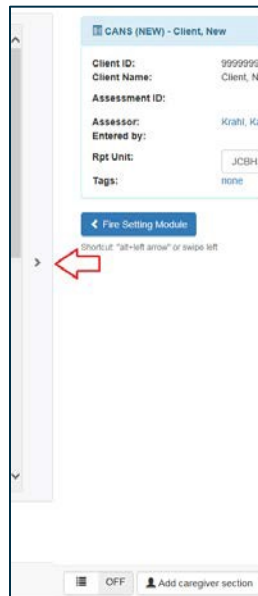
- ✓ **Submit:** The Submit option allows you to submit the assessment for review and approval of a supervisor. If successful, you will see a confirmation that says that the assessment was successfully submitted. If not, you will receive validation errors.



- ✓ **Submit and Approve:** The Submit and Approve option allows a supervisor or licensed clinician to submit the assessment and then immediately approve it in one click. If successful, you will see a confirmation that says that the assessment was successfully submitted. If unsuccessful, you may receive validation errors.
- ✓ **Edit:** the Edit option allows you to change information in the assessment.
- ✓ **Delete:** the Delete option allows for the deletion of an assessment. Delete ability depends on your Objective Arts role. For example, only an Administrator can delete a CANS/ANSA assessment that has already been approved in the system.

Side Panel

1. To open the side panel, click the arrow to the left side of the screen.

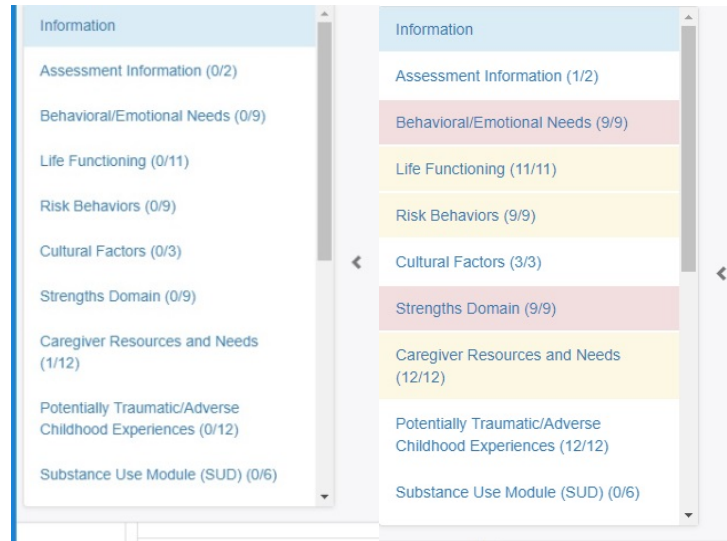


The purpose of this side panel is two-fold:

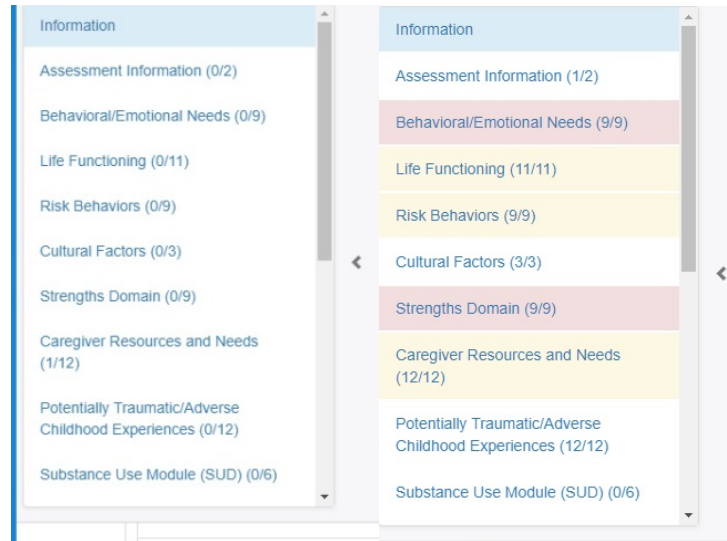
- It allows you to advance to the assessment domain or module of your choice.

- It provides a summary level, color-coded view (by actionable scores) of the domains and modules.

This example is of the panel when no scores in any of the assessment's sections have been entered.



This example is of the panel once assessment scores have been entered.

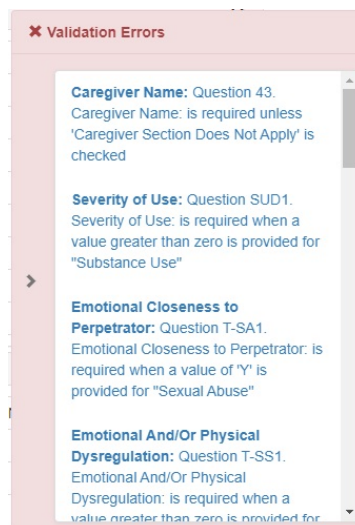


1. Once you are satisfied that your assessment is complete, click **Submit** to send the assessment to your supervisor for approval.



Validation Errors

1. Assessments submitted with missing or required information will receive a validation error dialogue box.
 - This is designed to ensure that all parts of the assessment are complete before submission.
 - The box, entitled Validation Errors, will list all of the items in the CANS (giving the item name, question number or full question) that must be completed.



- To complete required items, click an item showing in the Validation Error box to move the screen to that section of the assessment, and then click the paper and pencil icon located at the top, right corner of that section.

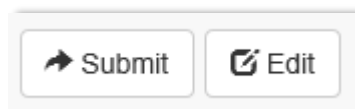
| Life Functioning | |
|-------------------------------------|---|
| 10. Family Functioning | |
| 11. Living Situation | |
| 12. Social Functioning | |
| 13. Developmental/Intellectual (DN) | 0 |
| 14. Decision Making | 0 |
| 15. School Behavior (SCH) | 0 |

- The section will open allowing for item completion.
 - Notice that the Validation Error box has minimized to the right side of the screen. After entering missing scores, click the arrow located around the middle of the Validation Error bar. (see the red arrow that is pointing to the left, below) to open the Validation Error box to select the next section/item that must be completed.

| Life Functioning | |
|---------------------------------------|------------|
| 10. Family Functioning * | 1 Add Note |
| 11. Living Situation * | 0 Add Note |
| 12. Social Functioning * | 2 Add Note |
| 13. Developmental/Intellectual (DN) * | Add Note |
| 14. Decision Making * | 0 Add Note |
| 15. School Behavior (SCH) * | 0 Add Note |
| 16. School Achievement (SCH) * | 1 Add Note |
| 17. School Attendance (SCH) * | 0 Add Note |
| 18. Medical/Physical * | 0 Add Note |
| 19. Sexual Development * | 0 Add Note |
| 20. Sleep * | 0 Add Note |

- Enter all missing scores and then click Save.

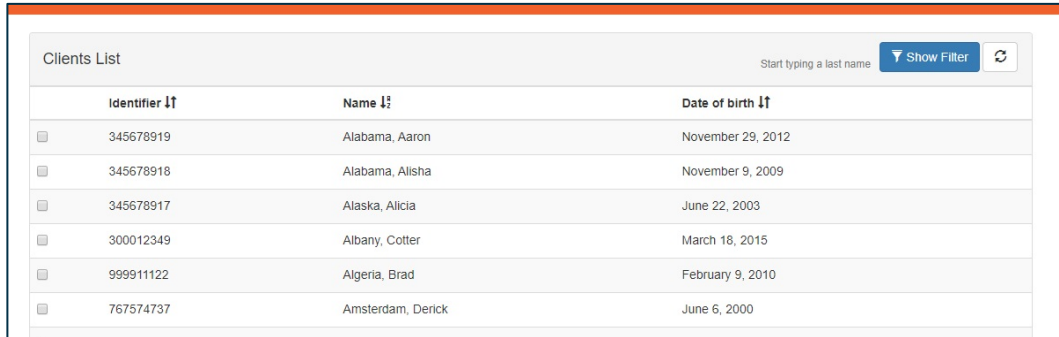
- Click Submit to submit the assessment to your supervisor for approval.



Accessing an Assessment

1. From the Clients List on the Menu Bar, select the client.

- Remember you can sort and/or filter the client results to help you find a specific client.



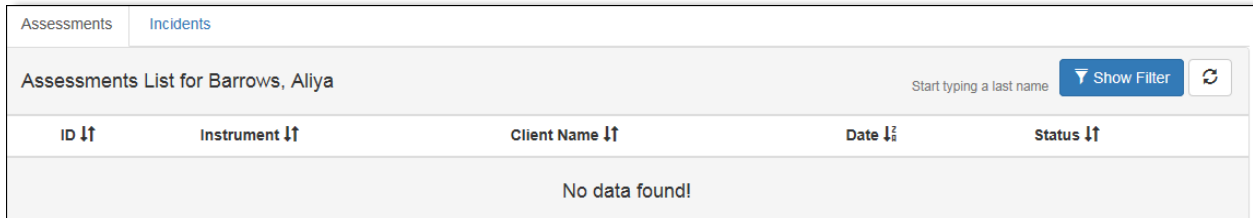
Clients List

Start typing a last name [Show Filter](#) [Refresh](#)

| Identifier ↑↓ | Name ↑↓ | Date of birth ↑↓ |
|------------------------------------|-------------------|-------------------|
| <input type="checkbox"/> 345678919 | Alabama, Aaron | November 29, 2012 |
| <input type="checkbox"/> 345678918 | Alabama, Alisha | November 9, 2009 |
| <input type="checkbox"/> 345678917 | Alaska, Alicia | June 22, 2003 |
| <input type="checkbox"/> 300012349 | Albany, Cotter | March 18, 2015 |
| <input type="checkbox"/> 999911122 | Algeria, Brad | February 9, 2010 |
| <input type="checkbox"/> 767574737 | Amsterdam, Derick | June 6, 2000 |

2. Once you find the client you are looking for, click on the row where the client's information appears.

- After selecting a client you will navigate to that client's Assessments screen. If the client has assessments entered into OA for him/her, there will be a list of those assessments. When a client is open to your program OU, you are allowed to see all of the client's assessments, even those created in programs and agencies that you are not assigned to. This screen will show all of these assessments. If there are no assessments in the system for the client, the screen will be blank and state "No data found!" (see below).



Assessments [Incidents](#)

Assessments List for Barrows, Aliya

Start typing a last name [Show Filter](#) [Refresh](#)

| ID ↑↓ | Instrument ↓↑ | Client Name ↑↓ | Date ↓↑ | Status ↓↑ |
|----------------|---------------|----------------|---------|-----------|
| No data found! | | | | |

- The list of assessments, if any, can be sorted and/or filtered.

3. Once the correct assessment is located, click the row where the assessment information appears.

- The assessment will open in the following format:

CANS - Last84918, First84918

| | | | |
|-----------------------|--|---------------------------|---|
| Client ID: | Id84918 | Date of Birth: | November 2, 2004 |
| Client Name: | Last84918, First84918 | Client Gender: | FEMALE |
| Assessment ID: | 1014900 | Assessment Date: | October 16, 2018 |
| Assessor: | Lipton, Marisa | Assessment Status: | Approved by King, Raphael on 12/10/2018 |
| Entered by: | Lipton, Marisa | | |
| Rpt Unit: | VCSSSB - SATS - D St (30F9E) | | |
| Tags: | English (LANA); ETHA (ETHA); White (White); Hispanic Origin (U) (HCU); San Bernardino (EC36) | | |

Assessment Information

Reason for Assessment: Planned Discharge

If reason for assessment is Major Life Event, Describe:

Caregiver Section(s)

1. Caregiver section(s) does not apply at this time

Life Domain Functioning

| | |
|-------------------------------|----|
| 2. Family Functioning | 2 |
| 3. Living Situation | 2 |
| 4. Social Functioning | 2 |
| 5. Recreational | 1 |
| 6. Developmental/Intellectual | 0 |
| 7. Job Functioning | NA |
| 8. Legal | 0 |
| 9. Decision Making | 1 |
| 10. Medical/Physical | 0 |

+ - Filter - Print - Reports - Edit Delete

- Depending upon the assessment status (assigned, submitted or approved) and your permission levels, from this screen, you may be able to review, edit, submit, print, submit or delete the assessment. You can also access the other functions on the toolbar along the bottom of your screen.
- If an assessment has been approved, the header bar of the assessment will be green. Assessments in the assigned or submitted status will have a blue header.

CANS - Last1234, First1234

| | | | |
|-----------------------|---------------------|---------------------------|--|
| Client ID: | 1234 | Date of Birth: | April 17, 1999 |
| Client Name: | Last1234, First1234 | Client Gender: | FEMALE |
| Assessment ID: | 95178 | Assessment Date: | March 16, 2015 |
| Assessor: | Smith, Susie | Assessment Status: | Approved by Smith, Susie on 04/07/2015 |
| Org Unit: | CCICMS (36811) | | |
| Tags: | none | | |

Creating Individual Assessment Reports

1. Navigate to a client's Assessments List *Please note: In order to access these reports, you must navigate to the assessment list via clicking on a specific client from the Clients List.*
2. Select the assessments you would like to report on by clicking the checkbox to left of each row.

Assessments List for Alabama, Aaron (345678919, Age: 6)

| ID | Instrument | Client Name | Date | Status |
|-------------------------------------|------------|----------------|-------------------|-----------------------------------|
| <input type="checkbox"/> | 147 PSC_35 | Alabama, Aaron | October 13, 2018 | Submitted |
| <input checked="" type="checkbox"/> | 243 CANS | Alabama, Aaron | October 13, 2018 | Approved by Heslinga, Tyler on 0 |
| <input checked="" type="checkbox"/> | 324 CANS | Alabama, Aaron | June 27, 2019 | Approved by Battis, Claire on 06/ |
| <input type="checkbox"/> | 325 PSC_35 | Alabama, Aaron | June 27, 2019 | Submitted |
| <input type="checkbox"/> | 328 CANS | Alabama, Aaron | October 24, 2019 | Approved by User, Sample on 10 |
| <input type="checkbox"/> | 329 CANS | Alabama, Aaron | October 15, 2019 | Approved by Support, OA on 10/2 |
| <input type="checkbox"/> | | Alabama, Aaron | November 7, 2019 | Assigned |
| <input type="checkbox"/> | | Alabama, Aaron | November 14, 2019 | Approved by Battis, Claire on 11/ |

Buttons: Compare Selected, Individual Collaborative, Reports

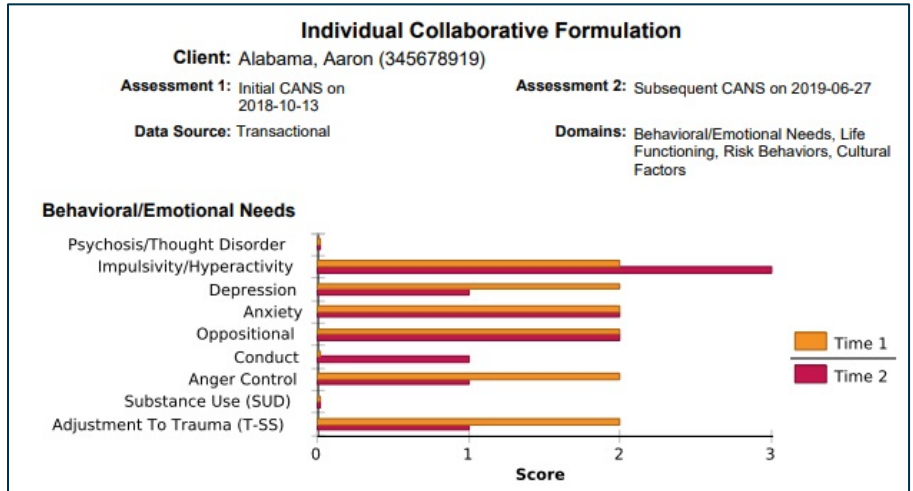
3. Click the name of the desired report.
 - The report will open in a new window in your browser.
4. For the Compare Selected report, select the assessments you would like to compare by clicking the checkbox to the left of each row. Up to five (5) assessments can be selected for comparison.

The Compare Selected report is a side by side comparison of selected assessments to show changes to a client's items' scores over time.

| Alabama, Aaron | | Approved | |
|---|-----------------------------|---------------|----------------|
| Client ID: 345678919 | | Pear, Alfonso | Battis, Claire |
| Date of Birth: 11/29/2012 | | 10-13-2018 | 06-27-2019 |
| # | Question | ProgramA2 | ProgramA2 |
| Assessment Information | | CANS | CANS |
| Assessment Type | | Initial | Subsequent |
| If reason for assessment is Update, describe: | | | |
| Behavioral/Emotional Needs | | | |
| 1 | Psychosis/Thought Disorder | 0 | 0 |
| 2 | Impulsivity/Hyperactivity | 2 | 3 |
| 3 | Depression | 2 | 1 |
| 4 | Anxiety | 2 | 2 |
| 5 | Oppositional | 2 | 2 |
| 6 | Conduct | 0 | 1 |
| 7 | Anger Control | 2 | 1 |
| 8 | Substance Use (SUD) | 0 | 0 |
| 9 | Adjustment To Trauma (T-SS) | 2 | 1 |

- For the Individual Collaborative report, select two assessments by clicking the checkbox to the left of each assessment row.

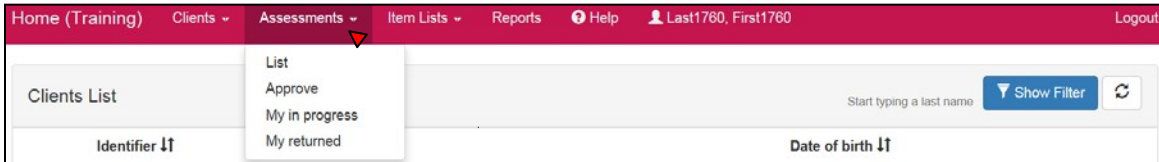
The Individual Collaborative report graphically represents a comparison of time one and time two (e.g. Initial versus Reassessment)



Assessment Approval

(A task for Supervisors and Clinical Administrators Only)

1. From the Data Portal Toolbar, click the Assessments option from the top Menu Bar and select Approve from the drop-down menu.




2. A list of submitted Assessments will display.
 - This list is sortable by ID number, Instrument, Client Name, Date, or Status of assessment.

The screenshot shows a table titled 'Assessments in need of approval'. The table has columns for ID, Instrument, Client Name, Date, and Status. There are four rows of data, each with a checkbox in the ID column. A 'Show Filter' button and a refresh icon are located at the top right of the table.

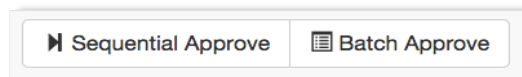
| ID | Instrument | Client Name | Date | Status |
|---------------------------------|------------|---|--------------------|-----------|
| <input type="checkbox"/> 364888 | CANS | Last4780, First4780 Assessor: Last307, First307 Reporting Unit | April 30, 2012 | Submitted |
| <input type="checkbox"/> 400687 | CANS | Last4507, First4507 Assessor: Last299, First299 Reporting Unit | August 14, 2012 | Submitted |
| <input type="checkbox"/> 363475 | CANS | Last6782, First6782 Assessor: Last257, First257 Reporting Unit | August 24, 2012 | Submitted |
| <input type="checkbox"/> 363730 | CANS | Last4871, First4871 Assessor: Last307, First307 Reporting Unit | September 14, 2012 | Submitted |

There are three ways you can choose to approve assessments from this screen. One way is to open the assessment by clicking on the assessment row, then approve. The second way is to approve using the Sequential Approve button. The third way is to approve using the Batch Approve button. The Sequential and Batch Approve methods are covered below.

- As you approve, you can refresh the list periodically by clicking on the  icon located to the right of the Show Filter button to see if any other assessments have arrived for approval.

3. The assessments to be approved can be filtered by using the Show Filter button.

- The Sequential and Batch Approve options are similar approval processes, but offer slightly different assessment form views. Both can be accessed via the toolbar at the bottom, right of the screen.



Sequential Approve

1. Click the Sequential Approve button at the lower right of the screen to access Assessments in need of approval.



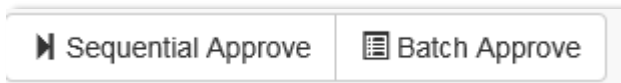
- The first assessment in the list of assessments will open in the format below:

- From here you can approve or reject each listed assessment on a rolling basis. For example, once approve/reject the first assessment, the second

assessment in the list opens for you to approve/reject, then the third, and so on. In this view, you can also Edit before approving, if necessary.

Batch Approve

1. Click the Batch Approve button at the lower right of the screen to access Assessments in need of approval.



- In this view, to the left of the screen is a panel of the assessments that need approval.
- To the right of the screen will display the first CANS that needs approval. Notice that this assessment format is much like the CANS hardcopy score sheet.

| ID | Client Name | Date |
|--------|-----------------------|------------|
| 364888 | Last4780, First4780 | 2012-04-30 |
| 400687 | Last4507, First4507 | 2012-08-14 |
| 363475 | Last6782, First6782 | 2012-08-24 |
| 363730 | Last4871, First4871 | 2012-09-14 |
| 357619 | Last9295, First9295 | 2012-10-16 |
| 392381 | Last4998, First4998 | 2013-01-25 |
| 363490 | Last23505, First23505 | 2013-02-05 |
| 363586 | Last31849, First31849 | 2013-03-14 |

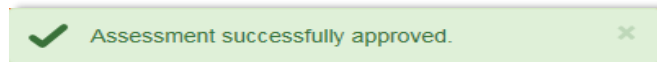
- You will be able to approve/reject the assessment and move to the next assessment automatically, like in Sequential Approval.

| ID | Client Name | Date |
|--------|--------------------------|------------|
| 364868 | Last4780, First4780 | 2012-04-30 |
| 400667 | Last1507, First4507 | 2012-08-14 |
| 363475 | Last6782, First6782 | 2012-08-24 |
| 363730 | Last4671, First4671 | 2012-09-14 |
| 357619 | Last9296, First0295 | 2012-10-18 |
| 392381 | Last4666, First4999 | 2013-01-25 |
| 363490 | Last23505, First23505 | 2013-02-05 |
| 363586 | Last31849, First31849 | 2013-03-14 |

- In Batch Approval mode, you are NOT able to edit the assessment before approving. If the assessments must be edited, you will need to exit Batch Approval mode.
2. For both processes, you will click the buttons (shown below) to either approve or reject the given assessment.



- After you approve the assessment, you will see a green confirmation box near the top right that says "Assessment successfully approved".

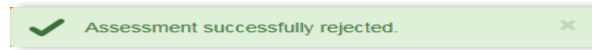


- If you choose to reject the assessment, you will receive Reject Assessment Note box in which you must note why the assessment is being rejected. The rejected assessment will be sent back to the assessor's ToDo box.

Reject Assessment Note X

Reject

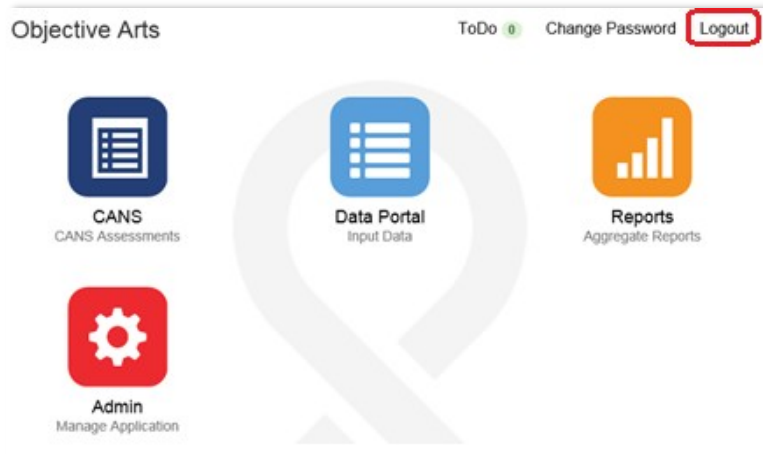
3. **Once you have entered your reason, click reject to confirm the rejection. If necessary, click the “x” at the top right to cancel the Reject Note process. You cannot reject an assessment without submitting a reject note.**
- Once you click reject, you will see a green confirmation box near the top right that says “Assessment successfully rejected”.



Logging Out

1. To log out, click Logout at the top right of the screen.

From the Home screen: Click Logout.



From all other screens (e.g. Administer Staff screen), click Logout.



Close your browser after your OA session for security.

If you need further assistance, please contact your agency's Objective Arts Champion. Champions are **technical experts** in the Objective Arts program, for the agency. Program specific OA Champions will contact CCBHS directly with Objective Arts questions and issues beyond their scope of knowledge.