

## Greetings,

At the last **CANS Implementation Coordinator Learning Collaborative** Meeting on Monday, 6/15/15, we discussed and reviewed the Onboarding Plan for OA-SMR Automated CANS System. In case you missed it, this is a monthly meeting facilitated by the **CANS Provider Collaborative** that takes place on the 3rd Monday from 3pm to 5pm at 2000 Embarcadero Cove, 5<sup>th</sup> Floor (Gail Steele Conference Room) in Oakland. Please have your Implementation Coordinator RSVP **Erin Rosenblatt, PhD** (CANS Provider Collaborative Coordinator) at [erosenblatt@westcoastcc.org](mailto:erosenblatt@westcoastcc.org). Anyhow, here's a summary the Onboarding Plan along with attached handouts. (**CANS Onboarding Plan; CSV Upload Format, OA-SMR CANS/ANSA Readiness Checklist plus Detail, CBO Provider Staff Excel Spreadsheet, OA-SMR BHCS Roles and Permissions, Professional Suffix Help File, OA Tutorial Video Links**)

## Onboarding Plan for OA-SMR Automated CANS System

### 1) Phased Implementation

We have grouped Children and TAY Providers into 4 cohorts. Each cohort is comprised of 10-12 organizations. Please see attached **CANS Onboarding Plan** to locate which **Cohort** your organization is in.

- **Cohort 1 (Jun 29 - Jul 17)**
- **Cohort 2 (Jul 20 - Jul 31)**
- **Cohort 3 (Aug 3 - Aug 14)**
- **Cohort 4 (Aug 17 - Aug 28)**

### 2) Initial Cohort Meeting

An initial meeting between BHCS, Objective Arts, and the entire Cohort will be held to clarify Onboarding steps. Each organization should plan on having their *CANS Implementation Team* at the table, including:

- **Implementation Coordinator:** point-person, project leader
- **System Administrator:** this is the individual who will be responsible for setting up your organization's OA-SMR account. They will have access to all information within the organization and across all Reporting Units (RUS). You may designate more than one person in this role. Please contact me ASAP to inform me who will be your designated CBO System Administrator.
- **IT Director (Optional):** First, you need to determine whether you plan to enter CANS assessments directly into the OA-SMR portal or upload CANS data from your Electronic Health Record to Objective Arts. If you opt to upload, please provide your IT Director with the attached **CSV Upload Format** document that describes the standardized file formats used to upload CANS assessments into Objective Arts and links to CSV files containing the definition all questions for each Alameda County version: CANS (0-5), CANS (6-17), ANSA-T (18-24).
- **QA Director (Optional):**
- **Training Director (Optional):**

### 3) Readiness Checklist

The attached **OA-SMR Readiness Checklist** outlines preparation steps needed for onboarding: Staff, Clients, Clinical training and OA-SMR Application.

- a) All staff that will use the OA-SMR application will need a Staff ID# to use as their login username. This is sometimes known as the InSyst Staff ID# and is used when claiming for services. Please follow steps under Staff Account Preparation on CANS/ANSA Readiness

## Checklist Detail

- b) Please instruct all of your clinicians who will be administering the CANS or ANSA-T to Alameda County BHCS clients to go to Praed Foundation CANS Training Collaborative Website [www.canstraining.com](http://www.canstraining.com) to update their profile. They will need to add their Staff ID# to the “External ID” and select the “California-Alameda County” Jurisdiction. Note: This also includes staff who are already CANS Certified in another jurisdiction.
- c) Designate a CBO System Administrator. This is the individual who will be responsible for setting up your organization’s OA-SMR account. They will have access to all information within the organization and across all Programs/Reporting Units (RUs). You may designate more than one person in this role.
- d) The attached **CBO Provider Staff Excel Spreadsheet** is a tool that can be used to collect the required additional information (*INSYST Staff ID#, First Name, Last Name, E-Mail, Job Title, Suffix, Role, and Placement*) for OA-SMR CANS Account Set Up. Your CBO System Administrator can fine tune the user profiles manually in the OA-SMR application or they may opt to submit a completed spreadsheet to CANS Project Director (Alex Jackson) for initial staff configuration.
- e) All users will be loaded with “clinician” as their default role. If any other role is appropriate, the CBO Administrator may update it in OA-SMR. The available roles are defined in the attached **OA-SMR BHCS Roles and Permissions** document.
- f) Also attached is a **Professional Suffix Help File** with definitions of standard accepted suffixes.
- a) OA has created a YouTube channel of tutorial videos. They cover topics such as how a CBO Administrator can activate and assign a Role to a Clinician or Supervisor, and also broader topics such as navigation and use of CANS Data Entry, assessment approval, etc. Attached you will find the **OA Tutorial Video Links** document listing the videos that are available, along with small list of bullet points discussing the features in each video.
  - o To simplify matters, OA has also created a YouTube channel, which may provide easier access to individual videos than sifting through a document of individual links. The following link should bring you to a playlist page, which includes playlist containing all of the Data Portal Tutorial videos:  
<https://www.youtube.com/channel/UCVIV8xpklj4P1IOypNJ0nqw/playlists>

Lastly, I am in the process of scheduling initial meeting dates for each Cohort and will be in touch. Should you have any questions or needs, don’t hesitate to contact me.

Alex

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