

# User Guide: CalOMS Outside Provider Client Tracking List Page

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## User Guide: CalOMS Outside Provider Client Tracking List Page

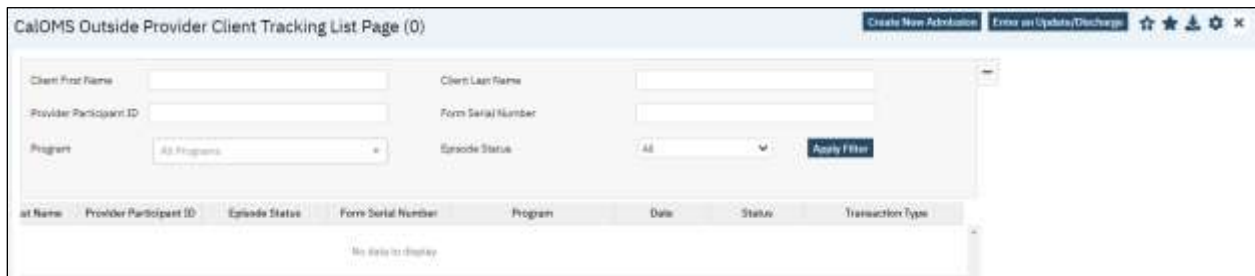
### General Information

The CalOMS Outside Provider Client Tracking List page acts as a Client Document list page for an Organizational Client in a CA County environment. While all documents are created under one Organizational Client, each CalOMS Outside Provider Admission represents and collects data for a unique individual and CalOMS Episode. The CalOMS Outside Provider Tracking List Page serves as a tool to look up records that need to be updated or discharged.


### Navigating to CalOMS Outside Provider Client Tracking List Page

#### From Search

1. Navigate to the **Search icon** (  ).
2. Enter **CalOMS Outside Provider Client Tracking List Page** in the **Search** field.
3. Select **CalOMS Outside Provider Client Tracking List Page (My Office)** in the **Search** field. The **CalOMS Outside Provider Client Tracking List Page** opens.



### Creating a New Admission


1. Navigate to the **CalOMS Outside Provider Client Tracking List Page**.
2. In the filters, search for a client who has been admitted.
3. Select **Create New Admission icon** (  ) in the toolbar.

Reference to the *CalOMS Outside Provider Admission Document User Guide* for details on how to create the **CalOMS Outside Provider Admission Document**.

4. Enter the client's data, which will generate an FSN/TEDS Episode.
5. Select the **Sign button** in the toolbar.
6. Client displays an admission record in the **CalOMS Outside Provider Client Tracking List Page**.

### Entering an Update/Discharge

1. One year later, the user returns to the list page to create an Annual Update for the same client.

2. User searches the list page and locates the client admission record.
3. User selects the checkbox next to the record.
4. User selects **Enter an Update/Discharge** icon (  ) in the toolbar.
5. The **CalOMS Outside Provider Update/Discharge** opens. All applicable data initializes from the most recently signed **CalOMS Outside Provider Document** for the associated FSN.

Refer to the *CalOMS Outside Provider Update/Discharge Document* for details on how to create the **CalOMS Outside Provider Update/Discharge Document**.

6. User completes and signs the document.  
The client displays in the Annual Update record in the **CalOMS Outside Provider Client Tracking List Page**.
7. Three months later, a user returns to the list page to enter a discharge for the same client.
8. Repeat steps 2-4.
9. The client displays as a Discharge record in the list page.

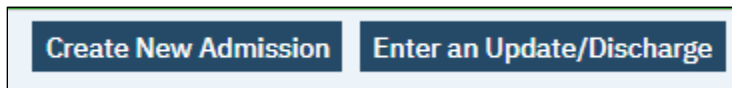
## Outside Provider Client Tracking List Page



### Toolbar

The toolbar displays two icons:

- Create New Admission
- Enter an Update/Discharge



- Create New Admission
  - Selecting the Action directs the user to a new CalOMS Outside Provider Admission Document.
- Enter an Update/Discharge



- Selecting the Action directs the user to a new CalOMS Outside Provider Update/Discharge to compete for the selected CalOMS Episode.

## Filters

The screenshot shows a filter interface with the following fields and controls:

- Client First Name: Text input field
- Client Last Name: Text input field
- Provider Participant ID: Text input field
- Form Serial Number: Text input field
- Program: Dropdown menu with "All Programs" selected
- Episode Status: Dropdown menu with "All" selected
- Apply Filter: Blue button

- Client First Name
  - Filters based on the Client First Name as it appears in the CalOMS Outside Provider Admission or CalOMS Outside Provider Update/Discharge>Field Name=What is the client's current first name?
- Client Last Name
  - Filters based on the Client First Name as it appears in the CalOMS Outside Provider Admission or CalOMS Outside Provider Update/Discharge>Field Name=What is the client's current first name?
- Provider Participant ID
  - Filters based on the Provider Participant ID as it appear in the CalOMS Outside Provider Admission or CalOMS Outside Provider Update Discharge > Field Name = Provider Participant ID.
- Program
  - Filters based on the Program as it appear in the CalOMS Outside Provider Admission or CalOMS Outside Provider Update Discharge > Field Name = Program.
  - Displays a list of programs the logged in user has permission to and is available based on the CDAG the user is currently logged in to.
- Episode Status
  - Options are
    - All
    - Active
    - Discharged
  - Filters based on the status of the CalOMS TEDS Episode
    - All returns all records that meet other filter parameters.
    - Active returns records that are tied to a TEDS Episode where Discharge Date <> null.
    - Discharge returns records that are tied to a TEDS Episode where the Discharge Date is null.

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- Form Serial Number
  - Filters based on the Form Serial Number as it appear in the CalOMS Outside Provider Admission or CalOMS Outside Provider Update Discharge > Field Name = Form Serial Number

## Global Codes

Field Name	Global Code Category Name
Episode Status	EPISODESTATUS

## Grid

Client First Name	Client Last Name	Provider Participant ID	Episode Status	Form Serial Number	Program	Date	Status	Transaction Type
No data to display								

- Checkbox
  - Allows the user to select a record from the list to complete a CalOMS Outside Provider Update/Discharge document.
  - Only one record is allowed to be selected at a time.
  - Once a record is selected, all other record checkboxes will be inactive.
  - For records where Current Status = Discharged the check box is inactive.
  - For records where there is a document with a status of In Progress the check box will be inactive. Ex: a Update/Discharge is currently In Progress, any previous Update/Discharges or Admission associated to that records episode should be inactive preventing the creation of a duplicate of the In Progress document. Instead the user should use the date hyperlink to open the In Progress document and continue.
- Client First Name
  - Label. This is a read only field.
  - Displays the Client First Name as it appear in the CalOMS Outside Provider Admission or CalOMS Outside Provider Update Discharge > Field Name = What is the client's current first name?
- Client Last Name
  - Label. This is a read only field.
  - Displays the Client Last Name as it appear in the CalOMS Outside Provider Admission or CalOMS Outside Provider Update Discharge > Field Name = What is the client's current last name?
- Provider Participant ID

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- Label. This is a read only field.
- Displays the Provider Participant ID as it appear in the CalOMS Outside Provider Admission or CalOMS Outside Provider Update Discharge > Field Name = Provider Participant ID.
- Episode Status
  - Label. This is a read only field.
  - Filters based on the status of the CalOMS TEDS Episode
    - Field displays Active when the record is tied to a TEDS Episode where Discharge Date <> null.
    - Field displays Discharged when the record is tied to a TEDS Episode where the Discharge Date is null.
    - Field displays all records that meet other filter parameters.
- Form Serial Number
  - Label. This is a read only field.
  - Displays the Form Serial Number as it appear in the CalOMS Outside Provider Admission or CalOMS Outside Provider Update Discharge > Field Name = Form Serial Number.
- Program
  - Label. This is a read only field.
  - Displays the Program as it appear in the CalOMS Outside Provider Admission or CalOMS Outside Provider Update Discharge > Field Name = Program.
- Date
  - Hyperlink
  - If the document type = CalOMS Outside Provider Admission then display the Admission Date.
  
  - If the document type = CalOMs Outside Provider Admission and the Transaction Type = Annual Update then display the Annual Update Date.
  - If the document type = CalOMs Outside Provider Admission and the Transaction Type = Discharge then display the Discharge Date.
- Status
  - Label. Read only.
  - Displays the Document status.
- Transaction Type
  - Label. This is a read only field.
  - Displays the Transaction Type based on the CalOMS Outside Provider Admission or CalOMS Outside Provider Update Discharge > Field Name = Transaction Type.



## Set-Up Considerations (Administrative Purpose)

This section outlines all items needed for setting up this document for use with your organization, including any necessary configurations/details around how to set up other areas of your system that work directly with this document.

### Configuration Keys

Field Name	Configuration Key Category Name
County of Submission	XSetCountyCodeForCaliforniaStateReporting

If your organization only provides services to clients within ONE county, then you should enter the County Code as defined by your state here. If nothing is entered, then on the form, user will be required to select the County every time. If something is entered here, then user will not see the field and it will prepopulate in the table for this document to be sent for reporting to the accurate county.

If your organization provides services to clients in more than one county and you report to each of those counties, then you should indicate 'None' in this key or leave it blank and users will be required to select the county each time they do the document.

If there are counties you do not provide services to, you can go to the DACSManagingEntity Global Code category in the Global Codes screen and deactivate any counties you do not want staff to see in the drop down. You should only do this for counties that NONE of your programs are serving. You should keep all counties that at least one program serves as active.

### Permissions

Permission Type	Permission Item
Document Codes (Edit)	CalOMS Outside Provider Admission
Document Codes (View)	CalOMS Outside Provider Admission
Document Codes (Edit)	CalOMS Outside Provider Update/Discharge
Document Codes (View)	CalOMS Outside Provider Update/Discharge
Screens	CalOMS Outside Provider Client Tracking List Page