



CalOMS Reporting User Guide

Standalone CalOMS and CalOMS Update/Discharge Workflow

Version 2.0
11/22/2022

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS-42
www.streamlinehealthcare.com





Table of Contents

Overview	3
Reporting Process	3
Reporting User Interface	4
Monitoring Reporting Prior to Submission	5
Creating a New Batch and Submitting Files	5
Viewing Batch Details	6
Accepting or Rejecting a Batch	7
Accepting or Rejecting an Individual Record	8
Workflows for Collecting Data	8
File Logic	11
Form Types	11
CalOMS Admission	11
CalOMS Admission Re-Submission	12
CalOMS Admission Deletion	12
CalOMS Annual Update	12
CalOMS Annual Update Re-Submission	13
CalOMS Annual Update Deletion	13
CalOMS Discharge	14
CalOMS Discharge Re-Submission	14
CalOMS Discharge Deletion	14
Form Serial Number (FSN)	15
Annual Update Number	15
System Setup	15
Global Codes	15
Programs	16
System Configuration Keys	16
Jobs to be Setup	17
Job Name 1:	18
Roles and Permissions	18

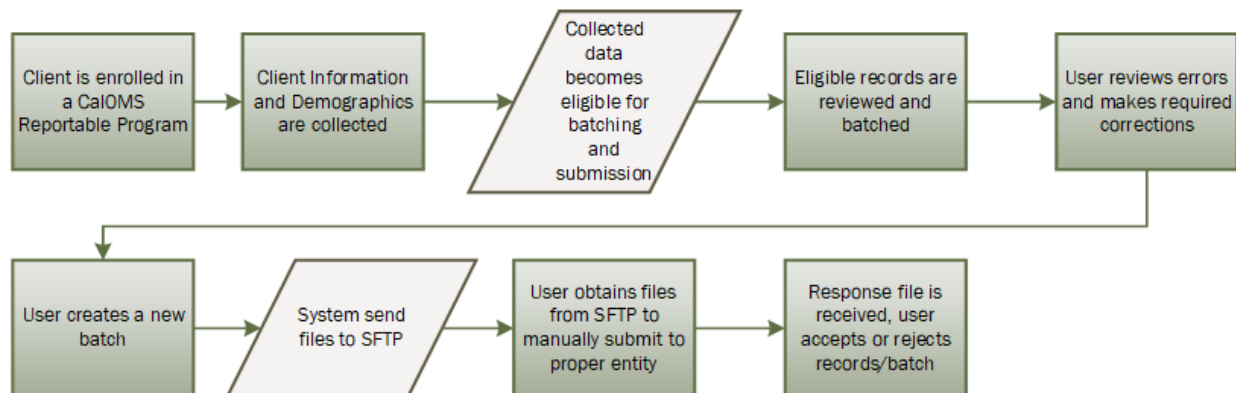
Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com

Overview

The CalOMS data collection process begins at time of program enrollment. A user will create a Program Assignment for a CalOMS reportable program with a Program Status of enrolled. This may be done using the Program Details Screen or the Program tab in the SC Core Registration. Once the Program Assignment is created a job will run at scheduled intervals that creates a TEDS episode for the reporting episode. Customers may create a Tracking Protocol based on their workflow needs that assigns a flag to the responsible user to complete the CalOMS Admission Document. This document collects the data required for the CalOMS Admission Records. Similarly, customers may also create a Tracking Protocols based on their needs for the CalOMS Annual Update and Discharge Requirements to assign a flag to the user responsible for collecting corresponding data. The CalOMS Update/Discharge Document functions dynamically to collect the required data for both the CalOMS Annual Update and CalOMS Discharge records based on the type of transaction the user indicated in the document. Once these documents have been signed as complete the data sets become eligible candidate records for batching and submission.

Reporting Process





Reporting User Interface

Once the data has been collected and is eligible for submission the records are available to be reviewed via the CalOMS Reporting Summary List Page. There the user can review the available candidate records, errors the records may have and the field level data for each record.

Navigating to the CalOMS Reporting Summary List Page.

1. Search for the CalOMS Reporting Summary List Page. (My Office) using the Search icon. Click on the CalOMS Reporting Summary List Page in the typable drop down. This will open the CalOMS Reporting Summary List Page.
2. Alternatively, locate the CalOMS Reporting Summary List Page using the Quicklink if this has been configured in your environment.

The CalOMS Reporting Summary List Page displays all eligible CalOMS submission records according to the following Status Types:

- In Progress = a record was created but not yet batched for reporting.
- Cancel = a record was created and batched for submission then later canceled. These records are no longer eligible for batching.
- Sent = the record was batched for submission and is awaiting response. These records are no longer eligible for batching.
- Accepted = A response file was received for the batch the record was included in and the record was marked as Accepted. These records are no longer eligible for batching.
- Reject = A response file was received for the batch the record was included in and the record was marked as Rejected. These records are no longer eligible for batching.

There are filters available in the CalOMS Reporting Summary List Page. These are as follows:

- Select a date range (From Date and To Date) for which data to be pulled for
- Record ID - this is the unique id assigned to the CalOMS record
- Managing Entity - the county that the CalOMS records are to be reported to may be selected.
- Batch ID - if a record has previously been batched, this field will filter on a specific Batch ID.
- Program - indicates which program the CalOMS record is associated with
- Provider - if the customer is a County entity and is utilizing MCO, this will indicate which Contracted Provider the CalOMS record is associated with
- Batch Type - this will default to CalOMS Batch Type

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com



- Record Type - this filter allows for differentiating between the different CalOMS record types; Admission, Annual Update and Discharge.
- Record Status - indicates the current status of the record.
- Client ID - this is the unique SC identifier of the client record associated with the CalOMS record.
- Responsible Staff - the staff who completed the data collection for the record will display
- Errors - this multi select filter will display the applicable errors.
- Days Awaiting Treatment - this column will display the number of days that lapsed between the Program Request Date and the Program Admission Date.
- LOC - based on the value the NoOfDaysForInitializationOnCaASAM configuration key is set to, the ASAM Level of Care from the most recently signed ASAM document per the configuration key value will display

Monitoring Reporting Prior to Submission

To monitor records throughout the reporting period, prior to your submission deadline, you can complete the following steps:

1. Navigate to the CalOMS Reporting Summary List Page.
2. Review or filter for records in a status of In Progress and/or Error since the last batch creation date or the last review date.
3. For records with a status of Error, use the Record ID hyperlink to navigate to the CalOMS Record Detail Page to further review of error messages and record data.
4. Work error messages by navigating to the screen in which the source data resides.
5. Once data has been corrected, navigate back to the CalOMS Reporting Summary List page and use the check box to select the record(s) that have been corrected then select Refresh Data from the Action drop down to pull the corrected data into that record to later be batched for submission.

Repeat these steps as many times as needed in order to view errors, make corrections and confirm the errors are resolved.

Reporting Summary Widget

Another utility available for monitoring records throughout the reporting period is the CalOMS Reporting Summary Widget. From the Dashboard a user can review basic statistics of records within a specific day range and Program(s).



1. Navigate to My Office > Dashboard
2. Locate the CalOMS Reporting Summary Widget

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com



3. Enter a number of past days for which to filter the records.
4. Select All or a specific Program using the drop down.
5. Click the refresh icon in the right hand corner of the widget if filters were modified.
6. Within the widget are hyperlinks that will direct the user to prefiltered list pages where they can review records, modify statuses or work errors as needed.

CalOMS Reporting Summary 			
Records in Past	<input type="text" value="0"/>	Days	All Programs 
Total Records	8		
Total Unsubmitted Record Count	6		
Total Records with Errors	4		
Total Records Submitted	2		
Total Record Accepted Count	0		
Total Record Rejected Count	0		
% of Success of Submitted Records	0%		
% of Rejected Count	0%		
Total # of Batches Submitted	10		
County Paying for services is required	3		
Admission Date is required	2		

The CalOMS Reporting Summary Widget displays the follow information:

- Total Records - distinct count of all records.
- Total Unsubmitted Record Count - distinct count of all records with a status of In Progress, Error, or Canceled. Clicking the number hyperlink will direct the user to the list page pre-filtered for these values.
- Total Records with Errors - distinct count of all records with a status Error. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.
- Total Records Submitted - distinct count of all records with a status Sent. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.
- Total Records Accepted Count - distinct count of all records with a status Accepted. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com





- Total Record Rejected Count - distinct count of all records with a status Rejected. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.
- % of Success of Submitted Records - displays the percentage of records with a status of Accepted of the records sent during the reporting period.
- % of Rejected Count - displays the percentage of records with a status of Rejected of the records sent during the period.
- Total # of Batches Submitted - this displays the distinct count of batches that were generated during the period. Clicking the number hyperlink will direct the user to the Compliance Batch list page pre-filtered for these values.
- Top 10 Errors - up to 10 errors will display in the last rows of the widget. This will display the top 10 most common errors for the period based on distinct counts. Clicking the number hyperlink will direct the user to the list page pre-filtered for applicable error.

Creating a New Batch and Submitting Files

To create a batch for submission there are two options, creating a batch file without errors or creating a batch file with errors.

To create a batch without errors:

1. Navigate to the CalOMS Reporting Summary List Page.
2. Filter records as desired based on last batch date or other requirements.
3. For Record Status set filter to In Progress.
4. Apply filter.
5. Review displayed records as needed.
6. Select the appropriate records. This can be done for individual records using the check boxes in the left hand column, clicking Select All or Select All on Page.
7. Once desired records have been selected use the Action drop down in the top right to select Create Batch Submission.
8. A pop up window will appear confirming the action to batch X number of records.
9. Click OK.
10. Once results have processed a green message will display above the filters confirming the action was successful.
11. The batched file is now available for retrieval via the Batch Detail Page or the SFTP.

Under certain circumstances it may be necessary to create a batch record with errors. In this situation, follow these steps:

1. Navigate to the CalOMS Reporting Summary List Page.
2. Filter records as desired based on last batch date or other requirements.

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com



3. For Record Status set filter to In Progress and Error.
4. Apply filter.
5. Review displayed records as needed.
6. Select the appropriate records. This can be done for individual records using the check boxes in the left hand column, clicking Select All or Select All on Page.
7. Once desired records have been selected use the Action drop down in the top right to select Create Batch Submission.
8. A pop up window will appear confirming the action to batch X number of records.
9. Click OK
10. Once results have processed a green message will display above the filters confirming the action was successful.
11. The batched file is now available for retrieval via the Batch Detail Page or the SFTP.

Viewing Batch Details

Once the batch has been generated there are two options for retrieving the file for submission. The first being from the customer's SFTP folder.

1. Navigate to the customer's SFTP folder.
2. Within that folder select the State Reporting folder.
3. Select the CalOMS folder.
4. Retrieve the file for the desired batch.

The second option is to utilize the Compliance Batch List Page.

1. Navigate to the Compliance Batch List Page using the search or Quicklinks as applicable.
2. Filter for Batch Type = CalOMS
3. Select other filters as appropriate.
4. Click Apply to refresh the List Page results.
5. Select the desired batch by clicking the Batch ID hyperlink, this will direct you to the Batch Detail Page.
6. From the Batch Detail Page click the hyperlink to the file in the Batch Details to download the results.

Accepting or Rejecting a Batch

Once the batch file has been sent to the appropriate entity, batches can be marked as accepted or rejected. To mark batches as accepted:

1. Navigate to the Compliance Batch List Page
2. Set Batch Type Filter to CalOMS, set other filters as appropriate.

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO- SHS42
www.streamlinehealthcare.com



3. Click Apply Filter
4. To accept multiple batches select the check boxes on the left, click All or All on Page.
5. Use the action
6. Accepting a batch can also be done individually by clicking the Batch Id hyperlink that directs you to the Compliance Batch Detail Page.
7. In the Batch Summary section select Accept from the Batch Status drop down.

To mark batches as rejected:

1. Navigate to the Compliance Batch List Page
2. Set Batch Type Filter to CalOMS, set other filters as appropriate.
3. Click Apply Filter
4. To reject multiple batches select the check boxes on the left, click All or All on Page.
5. Accepting a batch can also be done individually by clicking the Batch Id hyperlink that directs you to the Compliance Batch Detail Page.
6. In the Batch Summary section select Accept from the Batch Status drop down.

Accepting or Rejecting an Individual Record

Once the batch file has been sent to the appropriate entity, if a portion of records were accepted these can be marked as such. To mark records as accepted:

1. Navigate to the CalOMS Reporting Summary List Page.
2. Filter the results to display the records needing to be accepted. This can be done a number of ways including by date, Status, or Batch ID
3. Select the records you wish to accept using the check boxes, clicking All or All or Page.
4. Use the Action drop down to select Accept Records.

To mark records as rejected:

5. Navigate to the CalOMS Reporting Summary List Page.
6. Filter the results to display the records needing to be accepted. This can be done a number of ways including by date, Status, or Batch ID
7. Select the records you wish to reject using the check boxes, clicking All or All or Page.
8. Use the Action drop down to select Reject Records.

Workflows for Collecting Data

The clients that are eligible for reporting have been enrolled in or discharged from a CalOMS reportable program and have the proper documentation completed which has collected the CalOMS required data. CalOMS has age fields that are dependent on age as well as differing

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO- SHS42
www.streamlinehealthcare.com



requirements for Submissions, Re-Submission and Deletions. Please see the CalOMS File Mapping for more detailed specifications than the summary provided here.

SmartCare Screen	Description of Data	File Reported To
CalOMS Admission	ADM-2 Admission Transaction Type ADM-5 Source of Referral ADM-6 Days Waited to Enter Treatment ADM-7 Number of Prior Episodes ADM-8 CalWORKs Recipient ADM-9 Substance Abuse Treatment Under CalWORKs ADM-10 County Paying for Services ADM-11 Special Services Contract ID ADU-4 Primary Drug Age of First Use ADU-8 Secondary Drug Age of First Use ADU-11 Needle Use in Last 12 Months EMP-5 Highest School Grade Completed LEG-1 Criminal Justice Status LEG-2 CDC Number LEG-6 Parolee Services Network (PSN) LEG-7 FOTP Parolee LEG-8 FOTP Priority Status MED-1 Medi-Cal Beneficiary MED-5 Pregnant at Admission MED-7 Medication Prescribed as a Part of Treatment MED-8 Communicable Diseases: Tuberculosis MED-9 Communicable Diseases: Hepatitis C MED-10 Communicable Diseases: Sexually Transmitted Disease	Admission File
CalOMS Admission CalOMS Update/Discharge	TRN-2 Transaction Date and Time ADM-1 Admission Date CID-3 Gender CID-5 Current First Name CID-6 Current Last Name CID-8 Zip Code at Current Residence CID-9 Birth First Name CID-10 Birth Last Name CID-11a Place of Birth – County CID-11b Place of Birth – State CID-12 Driver's License Number CID-13 Driver's License State CID-14 Mother's First Name CID-15 Race CID-16 Ethnicity	Admission File Annual Update File Discharge File

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO- SHS42
www.streamlinehealthcare.com





SmartCare Screen	Description of Data	File Reported To
	CID-17 Veteran CID-18 Disability CID-19 Consent CID-20 Lesbian, Gay, Bisexual, Transgender ADU-1a Primary Drug (Code) ADU-1b Primary Drug (Name) ADU-2 Primary Drug Frequency ADU-3 Primary Drug Route of Administration ADU-5a Secondary Drug (Code) ADU-5b Secondary Drug (Name) ADU-6 Secondary Drug Frequency ADU-7 Secondary Drug Route of Administration ADU-9 Alcohol Frequency ADU-10 Needle Use EMP-1 Employment Status EMP-2 Work Past 30 Days EMP-3 Enrolled in School EMP-4 Enrolled in Job Training LEG-3 Number of Arrests Last 30 Days LEG-4 Number of Jail Days Last 30 days LEG-5 Number of Prison Days Last 30 days MED-2 Emergency Room Last 30 Days MED-3 Hospital Overnight Last 30 Days MED-4 Medical Problems Last 30 Days MED-11 HIV Tested MED-12 HIV Test Results MHD-1 Mental Illness MHD-2 Emergency Room Use / Mental Health MHD-3 Psychiatric Facility Use MHD-4 Mental Health Medication SOC-1 Social Support SOC-2 Current Living Arrangements SOC-3 Living With Someone SOC-4 Family Conflict Last 30 Days SOC-5 Number of Children SOC-6 Number of Children Age 5 Years or Younger SOC-7 Number of Children Living With Someone Else SOC-8 Number of Children Living With Someone Else and Parental Rights Terminated SYS-2 County Code or Direct Provider ID	
CalOMS Discharge	DIS-1 Discharge Date	Discharge File
CalOMS Update	AUP-1 Annual Update Date AUP-2 Annual Update Number	Annual Update File

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com





SmartCare Screen	Description of Data	File Reported To
CalOMS Update/Discharge	MED-6 Pregnant at Any Time During Treatment	Annual Update File Discharge File
Client Information	CID-2 Provider's Participant ID CID-4 Date of Birth CID-7 SSN	Admission File Annual Update File Discharge File
Program Details	ADM-4 Type of Service ADM-10 County Paying for Services ADM-11 Special Services Contract ID CID-2 Provider's Participant ID	Admission File Annual Update File Discharge File
System Generated	TRN-1 Type of Form SYS-1 System Record Indicator SYS-3 Report Month SYS-4 Submission Status / Provider No Activity (PNA) SYS-5 File Version	Admission File Annual Update File Discharge File
TEDS Details	TRN-3 Form Serial Number	Admission File Annual Update File Discharge File

File Logic

Record Types

The CalOMS records are reported as three main Form Types, each of which have additional sub-types and logic that drive the extraction of data for the submission file. Additionally, file requirements vary depending on the age of the client. These requirements are enforced at the document level by either requiring, hiding or conditionally displaying fields based on the clients age at time of admission. Discharge records also have an additional requirement aside from age that differentiate Administrative Discharges and Detox Discharges. These varied requirements are also enforced at the document level.

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com





CalOMS Admission

The CalOMS Admission is the first record submitted for any client. The admission establishes the CalOMS Form Serial Number (FSN) which is used to link all succeeding data for the specific episode. There are three types of Admission records: Admission, Re-Submission and Deletion.

For a record to be included as a CalOMS Admission record the following must occur:

1. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.
2. The client must have a completed CalOMS Admission

CalOMS Admission Re-Submission

When a record requires edits, a re-submission can be sent using SmartCare's document editing functionality.

For a record to be included as a CalOMS Admission Re-Submission the following must occur:

1. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.
2. The client must have a completed CalOMS Admission that was previously batched and sent to the appropriate entity.
3. The client must have a completed CalOMS Admission where the version number of that document is greater than version 1.

CalOMS Admission Deletion

When a record needs to be deleted, a Deletion can be sent using SmartCare's Error Document functionality.

For a record to be included as a CalOMS Admission Deletion the following must occur:

1. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.
2. The client must have a completed CalOMS Admission that was previously batched and sent to the appropriate entity.
3. The client must have a completed CalOMS Admission where the status of the document is Error or Deleted.

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com



CalOMS Annual Update

The CalOMS Annual Update is used to report annual data for the corresponding CalOMS Episode as defined by the FSN. There are three types of Annual Update records: Annual Update, Re-Submission and Deletion.

For a record to be included as a CalOMS Annual Update record the following must occur:

1. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.
2. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
3. The client must have a completed CalOMS Update/Discharge where the Transaction Type selected is Annual Update.

CalOMS Annual Update Re-Submission

When a record requires edits, a re-submission can be sent using SmartCare's document editing functionality.

For a record to be included as a CalOMS Annual Update Re-Submission the following must occur:

1. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.
2. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
3. The client must have a completed CalOMS Update/Discharge where the Transaction Type selected is Annual Update that has been batched and sent to the appropriate entity
4. The client must have a completed CalOMS Update/Discharge where the Transaction Type selected is Annual Update and the document version is greater than version 1.

CalOMS Annual Update Deletion

When a record needs to be deleted, a Deletion can be sent using SmartCare's Error Document functionality.

For a record to be included as a CalOMS Annual Update Deletion the following must occur:

1. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com



2. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
3. The client must have a completed CalOMS Update/Discharge where the Transaction Type selected is Annual Update that has been batched and sent to the appropriate entity
4. The client must have a completed CalOMS Update/Discharge where the Document Status is Error or Deleted.

CalOMS Discharge

The CalOMS Discharge is used to report data for the corresponding CalOMS Episode as defined by the FSN at time of discharge from the Episode. There are three types of Discharge records: Discharge, Re-Submission and Deletion.

For a record to be included as a CalOMS Discharge Record the following must occur:

4. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.
5. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
6. The client must have a completed CalOMS Update/Discharge where the Transaction Type selected is Discharge.

CalOMS Discharge Re-Submission

When a record requires edits, a re-submission can be sent using SmartCare's document editing functionality.

For a record to be included as a CalOMS Discharge Re-Submission the following must occur:

5. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.
6. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
7. The client must have a completed CalOMS Update/Discharge where the Transaction Type selected is Discharge that has been batched and sent to the appropriate entity
8. The client must have a completed CalOMS Update/Discharge where the Transaction Type selected is Discharge and the document version is greater than version 1.

CalOMS Discharge Deletion

When a record needs to be deleted, a Deletion can be sent using SmartCare's Error Document functionality.

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com



For a record to be included as a CalOMS Discharge Deletion the following must occur:

5. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.
6. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
7. The client must have a completed CalOMS Update/Discharge where the Transaction Type selected is Discharge that has been batched and sent to the appropriate entity
8. The client must have a completed CalOMS Update/Discharge where the Document Status is Error or Deleted.

Form Serial Number (FSN)

Following the creation of a Program Assignment with a Status of Enrolled to a Program with the required CalOMS setup a TEDS Episode will automatically be created. This will be done via a job that is scheduled to run at regular intervals. Part of the jobs function is to generate a TEDS Episode Number which can be found in the TEDS Episode Detail Page. This Episode Number will function as the CalOMS FSN. If needed, this field can be manually updated.

Annual Update Number

Although the Annual Update Number is visible in the CalOMS Update/Discharge Document this is a read only field calculated using the existing data or documents in the system. This field looks at previously complete CalOMS Update/Discharge Documents for the selected FSN and calculates the number where the Transaction Type is Annual Update since the completion of the Admission.

System Setup

In order to properly submit acceptable data the environment needs to be configured with allowable values and configurations.

Global Codes

All of the Global Codes which need to be setup are in the Global Codes tab of the CalOMS File Mapping spreadsheet. Please reference the File Mapping for details.

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO- SHS42
www.streamlinehealthcare.com



Programs

CalOMS reporting is episodic and requires set up for reportable programs including setting up the TEDS functionality. For further information on setting up and configuring the TEDS screens please reference the California TEDS User Guide.

To set the required program information navigate to Administration > Programs, click the Program Name from the list to open the Program Details Navigate to the Custom Fields Tab. Within this tab is the CalOMS Section including 4 fields.

1. CalOMS Service Type - this field indicates the type of treatment service and is required for CalOMS Reporting.
2. CalOMS Provider ID - this field is required when CalOMS Service Type does not equal None/Not Applicable. This is a 6 digit number of the County Code+Facility ID
3. Special Services Contracted Provider - If the check box is selected this will indicate the Program belongs to a Special Services Contracted Provider. In this circumstance the last four digits of the CalOMS Provider ID field will be reported as the Special Services Contract ID.
4. County Paying for Services - This field will become required when the Special Service Contracted Provider check box is selected. The county responsible to pay for the services is selected from the drop down.

Recodes

The following Recode is an optional setup if the customer would like to define the starting prefix of the system generated Form Serial Number (FSN). This value is held in the TEDS Episode Details Episode Number field.

Recode Category	Purpose	Character Code ID
XCalOMSFSNStartingValue	This Category is used to Set Prefix Value to Generate TEDS Episode Number of CalOMSFSN and this needs to be reported through California CalOMS Reporting	The default value of the character Code ID will be set to E0. If an alternative value is desired as the starting prefix for the system can be set. The format must be an alpha character followed by a 0.

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com



System Configuration Keys

System Configuration keys are set up in the Configuration Keys banner in SmartCare's Administration tab. The Key name can be filtered on. Then opening to the detail page allows the user to modify the Value field as indicated below. Then Saving the screen will update the information.

Configuration Key Name	Description
XSetCountyCodeForCaliforniaStateReporting	<p>This configuration key may be set in order to default and hide the county of submission field on the CalOMS Documents. If the customer is a county MHP or only reports to one California County this configuration key can be used to set the county for which all data will be reported for/to. If not set, the County field is available and the user will be required to select the county from the available Global Code.</p> <p>To set the configuration key find the FIPS County Code in the following table and enter it into the Value field.</p>

FIPS	County	FIPS	County	FIPS	County	FIPS	County
6001	Alameda	6031	Kings	6061	Placer	6091	Sierra
6003	Alpine	6033	Lake	6063	Plumas	6093	Siskiyou
6005	Amador	6035	Lassen	6065	Riverside	6095	Solano
6007	Butte	6037	Los Angeles	6067	Sacramento	6097	Sonoma
6009	Calaveras	6039	Madera	6069	San Benito	6099	Stanislaus
6011	Colusa	6041	Marin	6071	San Bernardino	6101	Sutter
6013	Contra Costa	6043	Mariposa	6073	San Diego	6103	Tehama
6015	Del Norte	6045	Mendocino	6075	San Francisco	6105	Trinity
6017	El Dorado	6047	Merced	6077	San Joaquin	6107	Tulare

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com



6019	Fresno	6049	Modoc	6079	San Luis Obispo	6109	Tuolumne
6021	Glenn	6051	Mono	6081	San Mateo	6111	Ventura
6023	Humboldt	6053	Monterey	6083	Santa Barbara	6113	Yolo
6025	Imperial	6055	Napa	6085	Santa Clara	6115	Yuba
6027	Inyo	6057	Nevada	6087	Santa Cruz		
6029	Kern	6059	Orange	6089	Shasta		

Roles and Permissions

Depending on the logged in user's responsibilities they will need access to the following permissions. Navigate to Administration > Role Definition and permission the items below by role as needed.

1. To view CalOMS Documents
 - a. Select Permission Type > Document Codes (View)
 - b. Grant CalOMS Admission and CalOMS Update/Discharge
 - c. Select Permission Type > Screens
 - d. Grant CalOMS Admission and CalOMS Update/Discharge
2. To edit CalOMS Documents
 - a. Select Permission Type > Document Codes (Edit)
 - b. Grant CalOMS Admission and CalOMS Update/Discharge
 - c. Select Permission Type > Screens
 - d. Grant CalOMS Admission and CalOMS Update/Discharge
3. To view the CalOMS Reporting Summary Widget
 - a. Select Permission Type > Widgets
 - b. Grant CalOMS Reporting Summary
4. To view CalOMS Records
 - a. Select Permission Type > Screens
 - b. Grant CalOMS Report Summary and CalOMS Report Summary Details
5. To view CalOMS Batch Records
 - a. Select Permission Type > Screens
 - b. Grant Compliance Batch List Page and Compliance Batch Detail Page

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com



Version Control

Revision Date	Description	Updated By
11/22/22	Update System Setup to include Recode for the FSN seed value	Erin Mabray

Copyright © 2019 Streamline Healthcare Solutions

510 E. Butler Ct., Kalamazoo, MI 49007 | Phone - (877) GO-SHS-41 | Fax - (877) GO-SHS42
www.streamlinehealthcare.com

