Running County Questions with Answers

Table of Contents

Caloms	1
If a client is enrolled in two programs that are both part of the same TEDS Episode Type, we going to be able to have two CalOMS FSN/records for the client?	are 2
CalOMS clients often have multiple episodes open at once. How do I set up SmartCare f a client to have more than one CalOMS Episode at the same time?	or 2
What is the workflow in SmartCare when a client has two FSN's with the same effective debecause the client enters two programs on the same day?	late 3
Can we get the Description below to populate on the CalOMS form rather than the 999 codes?	5
Data Migration: Why are we only migrating one open CalOMS Episode?	5
Data Migration: Should we include discharged records in the data migration files?	6
Data Migration: On set-up_data_documentregistrationdemographics Column AF Hispanic origin is required but that's not even a CalOMS field	6
Data Migration: Do you need separate row for admission and annual update?	6
Data Migration: On Set-up Data documentscaliforniadishchargeSUD Medicals, ColumnAl NO of days client uses needles, what is this field really collecting?	₹ 7
CSI	8
Data Migration: Should we include discharged records in the data migration files?	8
274	8
What are former Cerner counties doing about records that are suspended in Error?	8
CANS/PSC	8
Set Up	9
Is there a way to get help setting up the TEDS Episodes?	9

CalOMS

If a client is enrolled in two programs that are both part of the same TEDS Episode Type, are we going to be able to have two CalOMS FSN/records for the client?

Although the two programs may be for the same CalOMS Service Type category, if each program requires a different FSN, then the programs should be set up to two different Teds Episode Types in SmartCare. Here is how the workflow would work:

- There are two different external providers who provide the same type of CalOMS Service Type. The client is transferring from Program 1 to Program 2. This would require a new FSN for Program 2.
- Program 1 would be set up to a SmartCare Teds Episode Type to identify that Service Type + Program/Provider combination.
- Program 2 would be set up to a SmartCare Teds Episode Type to identify that Service Type + Program/Provider combination.
- Upon Program Enrollment to Program 1, SmartCare will create a TEDS Episode for the TEDS Episode Type set up and create an FSN.
- Upon Program Enrollment to Program 2, SmartCare will create a TEDS Episode for the TEDS Episode Type set up and create an FSN for this Episode.

CalOMS clients often have multiple episodes open at once. How do I set up SmartCare for a client to have more than one CalOMS Episode at the same time?

Below is an example of how to set up the TEDS so that a client can have multiple episodes within the same CalOMS Type of Service or different CalOMS Type of Service and generate a distinct FSN each episode. This set up allows the episodes to be independent from one another and does not require discharge from one to enroll in another. Original version of this mock up has been provided to CalMHSA to disseminate to counties.

Α	В	С	D	E	F
Episode ID	Episode Type	Service Type	Program(s)		
1	Maple Street Recovery Solutions RC 1 OS	CalOMS Srv Type 1	Maple Street Recovery Solutions RC OS		
2	Maple Street Recovery Solutions 2 OPTN OS	CalOMS Srv Type 1	Maple Street Recovery Solutions OPTN OS		
3	Howard Addiction Treatment Center - OTP	CalOMS Srv Type 1	Howard Addiction Treatment Center - OTP	CalOMS: The TEDS EpisodeToSubmit	
	Maple Street Recovery Solutions 2.1 IOS	CalOMS Srv Type 2	Maple Street Recovery Solutions 2.1 IOS	(Episode Type) is equal to the CalOMSProgram. Each Program is mapped	1:1
4	Freemont Adult Residential Hazelton Women's Recovery 3.1	CalOMS Srv Type 7	Freemont Adult Residential	with an Episode Type.	
9	Residential	CalOMS Srv Type 7	Hazelton Women's Recovery 3.1 Residential	CSI: Each CSI Program is mapped to the sa	me
6	Hazelton Women's Recovery 3.1 Residential 3.1 PAR DMC	CalOMS Srv Type 7	Hazelton Women's Recovery 3.1 Residential 3.1 PAR DMC	Episode Type	
			Hope Center Treatment Services, Sage Family Services Center, Valley View Treatment and Behavioral Services		
7	r csı	CSI			

Here is an example of how the episode would be generated for enrollments to these programs

•			•	•			1 0
A	В	С	D	E	F	G	Н
		or' . TEDO T					
		Client TEDS Tra					
Program Name	Enrolled Date	Discharge Date	TEDS Episode ID	TEDS Episode Type	TEDS Service Type	Episode Number (FSN)	Comments
				Maple Street	CalOMS Srv Type		
			100	Recovery	1	P0123456	
Maple Street Recovery Solutions RC OS	8/2/2023	8/30/2023		Solutions RC OS			
				Maple Street	CalOMS Srv Type		
			101	Recovery	caldivis siv Type	P0123457	
Maple Street Recovery Solutions OPTN OS	8/10/2023	9/15/2023		Solutions OPTN OS	1		Episode Type is 1:1 with a Program so every new Program enrollment creates a new Episode which creates a new FSN.
				Howard Addiction			
				Treatment Center -	CalOMS Srv Type		
Howard Addiction Treatment Center - OTP	9/20/2023	none	102	OTP	1	P0123458	
				Maple Street			Creates a new rsin.
				Recover Solutions	CalOMS Srv Type		
Maple Street Recovery Solutions 2.1 IOS	9/10/2023	none	103	2.1 IOS	2	P0123459	
				Hazelton			
				Women's Recovery	CalOMS Srv Type		
Hazelton Women's Recovery 3.1 Residential	8/26/2023	9/11/2023	104	3.1 Residential	7	P0123460	
Hope Center Treatment Services	8/3/2023	9/5/2023	105	CSI	CSI	none	All Program enrollments are
Sage Family Services Center	8/20/2023	10/1/2023	103	CSI	CSI	none	wrapped up under the existing
			106	CSI	CSI		No open episode exists so a new
Valley View Treatment and Behavioral Services	11/1/2023	none	100	CSI	CSI	none	Episode if created.

What is the workflow in SmartCare when a client has two FSN's with the same effective date because the client enters two programs on the same day?

Additional Question Context: Should we be about conversion files where there are two FSN for a client with the same effective date? This happens where there is good coordination of care and client enters two programs such as the residential facility across the street from the NTP and the client is enrolled in both programs on the same date>?

Answer:

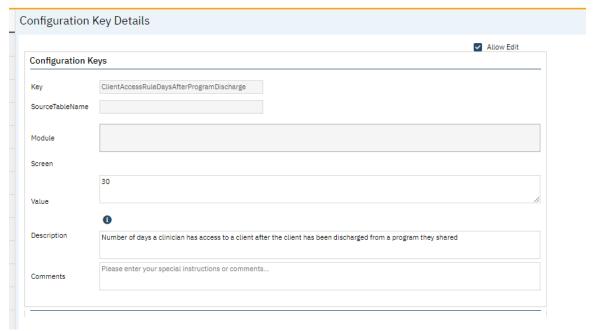
For data migration, the spreadsheet Setup_Data_DocumentCalOMSOutsideProviderAdmissions would be used to identify the two episodes and for each, they would have a unique Provider ID, Program ID, and FSN number. Then for each, you would want to have their own row in the Setup_Data_DocumentCaliforniaMHSRegistration entries for each of the tables starting with this name so that each would have their own Registration document created in the system.

On an ongoing basis, see the questions above about a client having more than one open CalOMS episode at a time and how to set this up and create the records correctly.

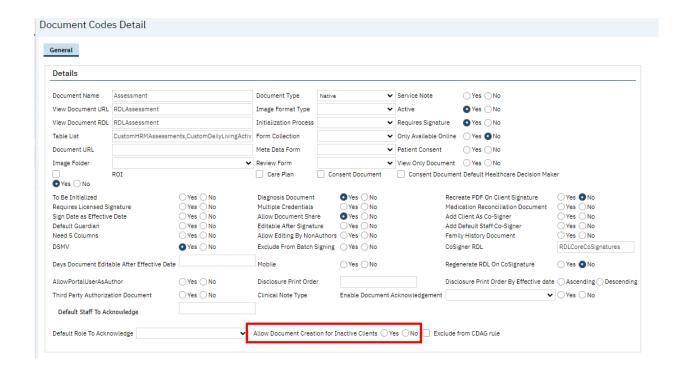
How can we set a CalOMS Document so that a user can still create the CalOMS Document after a Client is Discharged?

There are two settings in SmartCare which will allow the entry of any Document, including the CalOMS Document after a client is Discharged.

 In the Configuration Key Screen in SmartCare, find the key named 'ClientAccessRulDaysAfterProgramDischarge'. Click on the Key name in the list to open the detail screen below. The Value entered is the number of days a user will have access to the client record and can enter a document for the client after a program discharge is completed.



2. In the Document Management Screen, open the CalOMS document and set the 'Allow Document Creation for Inactive Clients' to Yes. This will allow this document to be created in the client records even if the Client is Inactive. (Clients are made Inactive on the Client Information Screen - General tab - by unchecking the Active checkbox.)

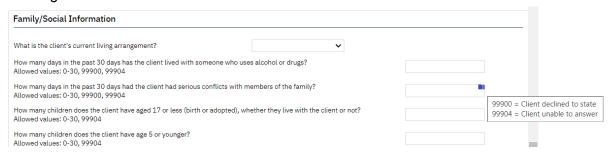


Can we get the Description below to populate on the CalOMS form rather than the 999 codes?

- 99900 Client declined to state
- 99901 = Not sure/don't know
- 99902 = None or not applicable
- 99903 = Other
- 99904 Client unable to answer

Answer: These codes are used on numeric fields when the numeric information is not known. There are two things which could be done to help staff know what these values mean:

 A user in your organization with System Administration permissions can insert Hover Help into the fields. This is would insert a blue box on the field staff can hover over to give them instructions.



 A user in your organization with System Administration permissions can insert a label change on the screen to provide more instructions. This will appear directly in the label which staff see on the screen.

Family/Social Information	
What is the client's current living arrangement?	~
How many days in the past 30 days has the client lived with someon (client declined to state), 99904 (client unable to answer)	ne who uses alcohol or drugs? Allowed values: 0-30, 99900

Data Migration: Why are we only migrating one open CalOMS Episode?

Answer: You can migrate more than one open episode for a client as long as each episode has a unique FSN. The FSN is the identifier sent to the state for each episode reported. So if the legacy system only has one FSN for a client, then only one episode can be migrated. If the legacy system has more than one FSN for the client, then each unique FSN can be migrated to SmartCare as an episode. We do recommend only migrating episodes that are open (not yet discharged) as those are the episodes and FSNs that are needed to continue reporting CalOMS in SmartCare.

Data Migration: Should we include discharged records in the data migration files?

No, only records which the episode is still open at the time of going live with collecting data in SmartCare and needing to report the data in SmartCare would be migrated. This does not include any episodes that are discharged.

Data Migration: On

set-up_data_documentregistrationdemographics Column AF Hispanic origin is required but that's not even a CalOMS field

This maps to field CID-16: Ethnicity. The SmartCare logic is to use the field named Hispanic Origin to report this field.

Data Migration: On

set-up_data_documentregistrationdemographics Column AF
Primary Language is required but that's not even a CalOMS field
Answer: this is only needed when migrating CSI episodes, not CalOMS episodes.

Data Migration: Do you need separate row for admission and annual update?

Additional Question Context: For example if client has no disability at admission but have disability on annual update. Which record do we need to migrate or just once record with latest disability status?

Answer: Admissions and Annual Updates need to be migrated as 2 separate records. Although they share some tables the are two unique records in the system and need to be migrated as such.

Data Migration: On Set-up Data documentscaliforniadishchargeSUD Medicals, ColumnAR NO of days client uses needles, what is this field really collecting?

Additional Question Context: The field data migration instruction is telling up to use YorN Char. No of days should be an integer. Same with column AS, AO and AT, etc. This doc also jumps back and forth from integer and global code.

Answer: CalMHSA team - please confirm the latest version of the file mapping is available. The columns noted in the question in the latest version are all noted in the instructions as not applicable for CalMHSA counties so no data is required. Instead, the column applicable for CalMHSA counties are the corresponding questions which are numeric fields to capture the number of days. For example, the field CalMHSA counties have on their CalOMS Documents is named 'How many days has the client used needles to inject drugs in the past 30 days?'. This is to report the field ADU-10 named Needle Use in the CalOMS file. (Note in the current spreadsheet we have for Setup_Data_DocumentCaliforniaSUDMedicalAndMentalHealths this field is column W.)

Please be sure to refer to the instruction sheets to confirm if the field is required. And if it is, as you can see from the above examples, the database column names often reflect the name on fields on the Screens. So another way to review a question regarding better understanding of what a field is collecting would be to open the CalOMS documents in SmartCare and look for the field asking a question related to the database column name.

CSI

Data Migration: Should we include discharged records in the data migration files?

No, only records which the episode is still open at the time of going live with collecting data in SmartCare and needing to report the data in SmartCare would be migrated. This does not include any episodes that are discharged.

274

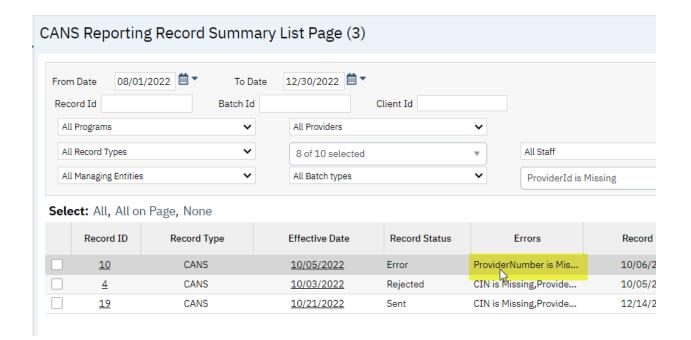
What are former Cerner counties doing about records that are suspended in Error?

Answer: Streamline would like to ask others in the next call to get input from other counties.

CANS/PSC

Would like to know if there are going to be validations implemented in the CANS/PSC forms for end users that can help reduce state reporting errors.

Answer: Yes, for reportable fields collected in the CANS or PSC 35 documents that are document validations that will prevent the user from signing the document until they have provided a value for each field that satisfies the state's requirements. For reportable fields not collected in the document the CANS and PSC 35 Reporting List Pages will run a validation on every element in the record and provide error messages for items that would not be accepted. For example, the Program in which the CANS was completed does not have the Provider ID set up on the Program Custom Fields tab. When this record gets to the CANS Reporting List Page it will have a status of error with a message stating that the Provider IDis Missing as pictured below. These list pages are used to review and work errors prior to submission to minimize the number of errors received back from the state.



Set Up

Is there a way to get help setting up the TEDS Episodes?

This can be loaded prior to go live or prior to starting the state reporting. To complete this, Streamline needs a spreadsheet with the Program Names, the Program IDs, is this an MH or SUD program, and then what the TEDS Episode Name and Service Type (if something other than what is currently in the set up) should be that the Program is mapped to. We can create the TEDS episodes and map them to the programs per the spreadsheet.