

Running County Questions with Answers

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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.

| A | B | C | D | E | F |
|------------------------|---|-------------------|--|---|--|
| TEDS Setup List | | | | | |
| Episode ID | Episode Type | Service Type | Program(s) | | |
| 1 | Maple Street Recovery Solutions RC OS | CaIOMS Srv Type 1 | Maple Street Recovery Solutions RC OS | CaIOMS: The TEDS EpisodeToSubmit (Episode Type) is equal to the CaIOMSProgram. Each Program is mapped 1:1 with an Episode Type. | |
| 2 | Maple Street Recovery Solutions OPTN OS | CaIOMS Srv Type 1 | Maple Street Recovery Solutions OPTN OS | | |
| 3 | Howard Addiction Treatment Center - OTP | CaIOMS Srv Type 1 | Howard Addiction Treatment Center - OTP | | |
| 3 | Maple Street Recovery Solutions 2.1 IOS | CaIOMS Srv Type 2 | Maple Street Recovery Solutions 2.1 IOS | | |
| 4 | Freemont Adult Residential | CaIOMS Srv Type 7 | Freemont Adult Residential | | |
| 5 | Hazelton Women's Recovery 3.1 Residential | CaIOMS Srv Type 7 | Hazelton Women's Recovery 3.1 Residential | | |
| 6 | Hazelton Women's Recovery 3.1 Residential 3.1 PAR DMC | CaIOMS Srv Type 7 | Hazelton Women's Recovery 3.1 Residential 3.1 PAR DMC | | CSI: Each CSI Program is mapped to the same Episode Type |
| 7 | CSI | CSI | Hope Center Treatment Services, Sage Family Services Center, Valley View Treatment and Behavioral Services | | |

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

| A | B | C | D | E | F | G | H |
|---|---------------|----------------|-----------------|---|-------------------|----------------------|---|
| Client TEDS Tracking | | | | | | | |
| Program Name | Enrolled Date | Discharge Date | TEDS Episode ID | TEDS Episode Type | TEDS Service Type | Episode Number (FSN) | Comments |
| Maple Street Recovery Solutions RC OS | 8/2/2023 | 8/30/2023 | 100 | Maple Street Recovery Solutions RC OS | CaIOMS Srv Type 1 | P0123456 | Episode Type is 1:1 with a Program so every new Program enrollment creates a new Episode which creates a new FSN. |
| Maple Street Recovery Solutions OPTN OS | 8/10/2023 | 9/15/2023 | 101 | Maple Street Recovery Solutions OPTN OS | CaIOMS Srv Type 1 | P0123457 | |
| Howard Addiction Treatment Center - OTP | 9/20/2023 | none | 102 | Howard Addiction Treatment Center - OTP | CaIOMS Srv Type 1 | P0123458 | |
| Maple Street Recovery Solutions 2.1 IOS | 9/10/2023 | none | 103 | Maple Street Recovery Solutions 2.1 IOS | CaIOMS Srv Type 2 | P0123459 | |
| Hazelton Women's Recovery 3.1 Residential | 8/26/2023 | 9/11/2023 | 104 | Hazelton Women's Recovery 3.1 Residential | CaIOMS Srv Type 7 | P0123460 | |
| Hope Center Treatment Services | 8/3/2023 | 9/5/2023 | 105 | CSI | CSI | none | All Program enrollments are wrapped up under the existing Episode if created. |
| Sage Family Services Center | 8/20/2023 | 10/1/2023 | | | | | |
| Valley View Treatment and Behavioral Services | 11/1/2023 | none | 106 | CSI | CSI | none | |

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_DocumentCaIOMSOutsideProviderAdmissions 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.

1. In the Configuration Key Screen in SmartCare, find the key named 'ClientAccessRuleDaysAfterProgramDischarge'. 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.

Configuration Key Details

Allow Edit

Configuration Keys

Key: ClientAccessRuleDaysAfterProgramDischarge

SourceTableName:

Module:

Screen:

Value: 30

Description: Number of days a clinician has access to a client after the client has been discharged from a program they shared

Comments: Please enter your special instructions or comments...

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.)

Document Codes Detail

General

Details

| | | | | | |
|---|---|---|---|---|--|
| Document Name | Assessment | Document Type | Native | Service Note | <input type="radio"/> Yes <input type="radio"/> No |
| View Document URL | RDLAssessment | Image Format Type | | Active | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| View Document RDL | RDLAssessment | Initialization Process | | Requires Signature | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| Table List | CustomHRMAssessments,CustomDailyLivingActiv | Form Collection | | Only Available Online | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Document URL | | Meta Data Form | | Patient Consent | <input type="radio"/> Yes <input type="radio"/> No |
| Image Folder | | Review Form | | View Only Document | <input type="radio"/> Yes <input type="radio"/> No |
| <input type="checkbox"/> ROI | | <input type="checkbox"/> Care Plan | | <input type="checkbox"/> Consent Document | |
| <input checked="" type="radio"/> Yes <input type="radio"/> No | | <input type="checkbox"/> Consent Document Default Healthcare Decision Maker | | | |
| To Be Initialized | <input type="radio"/> Yes <input type="radio"/> No | Diagnosis Document | <input checked="" type="radio"/> Yes <input type="radio"/> No | Recreate PDF On Client Signature | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| Requires Licensed Signature | <input type="radio"/> Yes <input type="radio"/> No | Multiple Credentials | <input type="radio"/> Yes <input type="radio"/> No | Medication Reconciliation Document | <input type="radio"/> Yes <input type="radio"/> No |
| Sign Date as Effective Date | <input type="radio"/> Yes <input type="radio"/> No | Allow Document Share | <input checked="" type="radio"/> Yes <input type="radio"/> No | Add Client As Co-Signer | <input type="radio"/> Yes <input type="radio"/> No |
| Default Guardian | <input type="radio"/> Yes <input type="radio"/> No | Editable After Signature | <input type="radio"/> Yes <input type="radio"/> No | Add Default Staff Co-Signer | <input type="radio"/> Yes <input type="radio"/> No |
| Need 5 Columns | <input type="radio"/> Yes <input type="radio"/> No | Allow Editing By NonAuthors | <input type="radio"/> Yes <input type="radio"/> No | Family History Document | <input type="radio"/> Yes <input type="radio"/> No |
| DSMV | <input checked="" type="radio"/> Yes <input type="radio"/> No | Exclude From Batch Signing | <input type="radio"/> Yes <input type="radio"/> No | CoSigner RDL | RDLCoreCoSignatures |
| Days Document Editable After Effective Date | | Mobile | <input type="radio"/> Yes <input type="radio"/> No | Regenerate RDL On CoSignature | <input type="radio"/> Yes <input checked="" type="radio"/> No |
| AllowPortalUsersAsAuthor | <input type="radio"/> Yes <input type="radio"/> No | Disclosure Print Order | | Disclosure Print Order By Effective date | <input type="radio"/> Ascending <input type="radio"/> Descending |
| Third Party Authorization Document | <input type="radio"/> Yes <input type="radio"/> No | Clinical Note Type | | Enable Document Acknowledgement | |
| Default Staff To Acknowledge | | | | | <input type="radio"/> Yes <input type="radio"/> No |
| Default Role To Acknowledge | | Allow Document Creation for Inactive Clients | <input type="radio"/> Yes <input type="radio"/> No | Exclude from CDAG rule | <input type="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.

Family/Social Information

What is the client's current living arrangement?

How many days in the past 30 days has the client lived with someone who uses alcohol or drugs?
Allowed values: 0-30, 99900, 99904

How many days in the past 30 days had the client had serious conflicts with members of the family?
Allowed values: 0-30, 99900, 99904

How many children does the client have aged 17 or less (birth or adopted), whether they live with the client or not?
Allowed values: 0-30, 99904

How many children does the client have age 5 or younger?
Allowed values: 0-30, 99904

99900 = Client declined to state
99904 = Client unable to answer

- 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.

The screenshot shows a form titled "Family/Social Information". The first question is "What is the client's current living arrangement?" followed by a dropdown menu. The second question is "How many days in the past 30 days has the client lived with someone who uses alcohol or drugs? Allowed values: 0-30, 99900 (client declined to state), 99904 (client unable to answer)" followed by a text input field.

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 they 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.

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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 ID is 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.

CANS Reporting Record Summary List Page (3)

From Date To Date

Record Id Batch Id Client Id

All Programs All Providers

All Record Types 8 of 10 selected All Staff

All Managing Entities All Batch types ProviderId is Missing

Select: All, All on Page, None

| | Record ID | Record Type | Effective Date | Record Status | Errors | Record |
|--------------------------|--------------------|-------------|----------------------------|---------------|---------------------------|---------|
| <input type="checkbox"/> | 10 | CANS | 10/05/2022 | Error | ProviderNumber is Mis... | 10/06/2 |
| <input type="checkbox"/> | 4 | CANS | 10/03/2022 | Rejected | CIN is Missing,Provide... | 10/05/2 |
| <input type="checkbox"/> | 19 | CANS | 10/21/2022 | Sent | CIN is Missing,Provide... | 12/14/2 |

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.