User Guide: CalOMS Outside Provider Client Tracking List Page

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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.

Initial Setup of an Organizational Client

A system Administrator needs to complete this set up in the SmartCare system prior to staff beginning to use the Outside Provider List Page. The purpose of this setup is to establish the one Organizational Client Record which will be used to link all of the Outside Provider documents to. To create an Organizational Client Record complete the following steps one time only in the SmartCare system:

Open the Client Search pop up using the Client icon at the top of the SmartCare screen and choosing the 'Client Search' option from the drop down menu.

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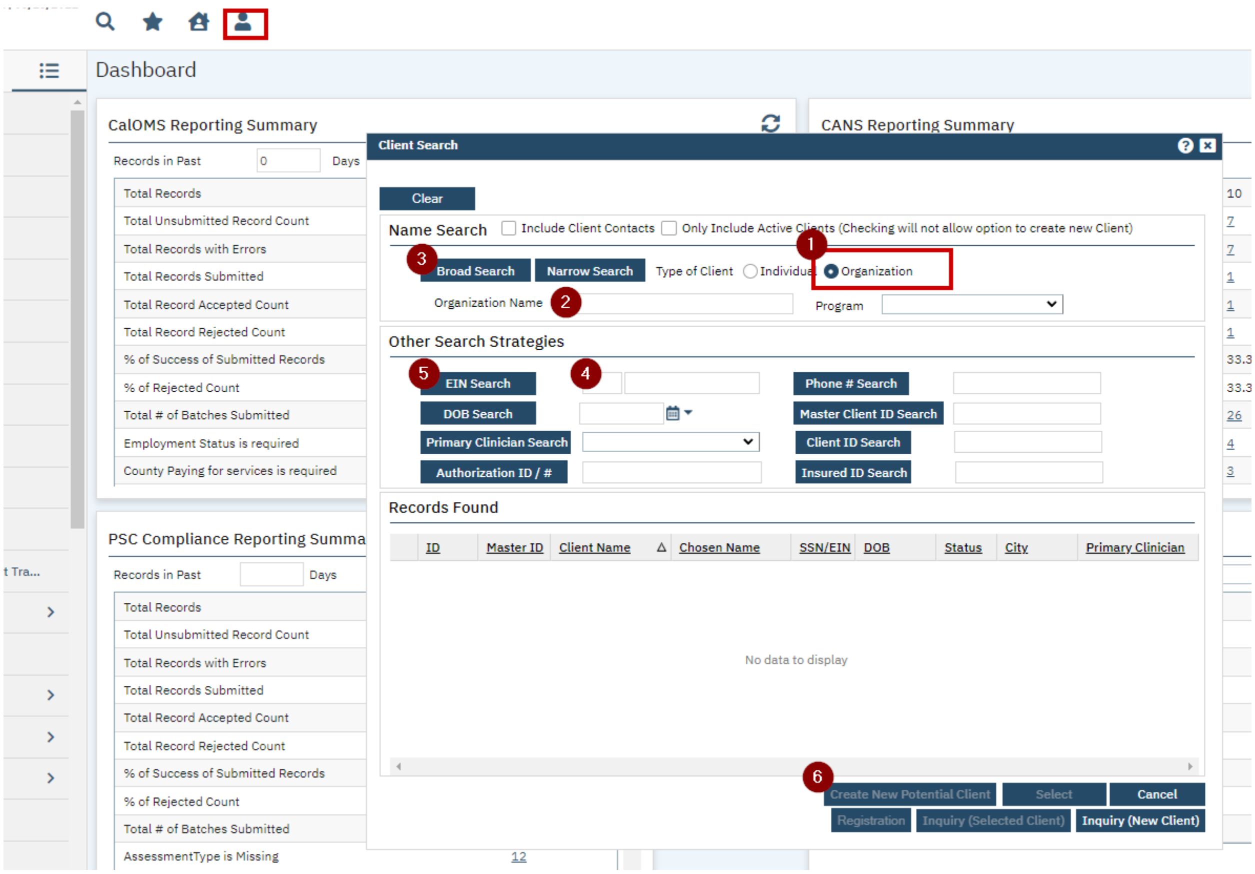

Once the Client Search pop up appears:

1. Click on the radio button for Organizational Client
2. Enter the Organization Name you want staff to enter in each time they begin a new Outside Provider Record. For example, a recommended name is 'Outside Provider'.
3. Click the Broad Search button in the pop up to confirm this name does not already exist in the system.
4. Enter an EIN number. Note, if there is not a legitimate EIN number to use, enter 11-1111111.
5. Click the EIN Search button in the pop up to confirm this EIN does not already exist in the system.
6. Click the 'Create New Potential Client' button at the bottom of the pop up. This will only be enabled after completing the two searches noted in the steps above.
    a. If the button is not enabled, click on Broad Search again and click on EIN Search again. If it is still not enabled, it is likely a permissions issue for the staff login.

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Once the Organizational Client Record is completed, now the staff can begin to enter Outside Provider Records as outlined in the sections below.

Why does the system have to have an Organizational Client?

Because the collection of data is done via the Outside Provider Admission Document and via the Outside Provider Update/Discharge Document, there is a data model requirement that the documents need to be associated with a Client ID. Since the purpose of the Outside Provider workflow is to not have to have a Client ID, the Organizational Client serves as that Client ID for all Outside Provider documents. This is why it is only necessary to set up one Organizational Client for the purposes of this workflow.

Day to Day Use of the Outside Providers Workflow

In general, the workflow for staff who need to enter an Outside Providers Record will be:

1. Open the CalOMS Outside Provider Client Tracking List Page.
2. Search on the Client's First Name and Last Name to ensure a record does not already exist for your Program.
3. If a record does not already exist, click 'Create New Admission' to enter a new admission for a new client not already in the list. Follow the steps outlined in the CA CalOMS Outside Provider Admission Document User Guide.
4. Return to the list page to when an Update or Discharge is needed for an open Admission. Click on the 'Enter an Update/Discharge' button to enter an Update or Discharge. Follow the steps outlined below to complete this entry.
5. Once the Record has a Discharge, then a new Admission is needed if the client will again be documented for in the Outside Provider workflow.

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.

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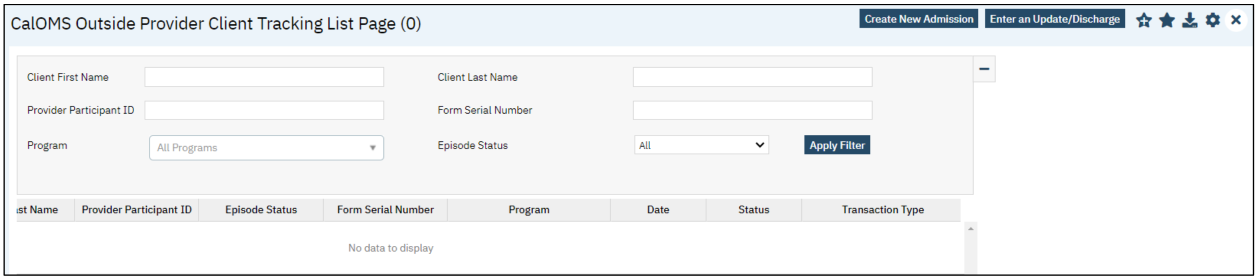

Creating a New Admission

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** (Create New Admission) 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**. Note that to start this process, you will need to search on the Organization Name that was set up in the administrator set up step noted above. This is outlined in more detail in the *CalOMS Outside Provider Admission Document User Guide.*

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 or at the time of discharge, 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** (Enter an Update/Discharge) 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.

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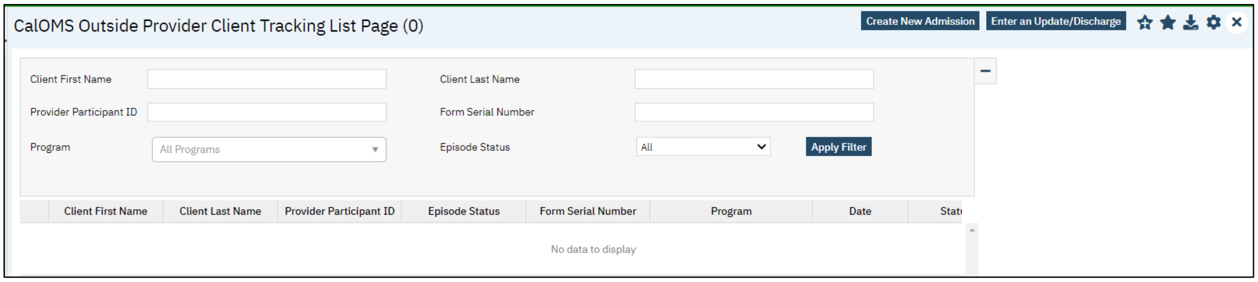
8. Repeat steps 2-4.
9. The client displays as a Discharge record in the list page.

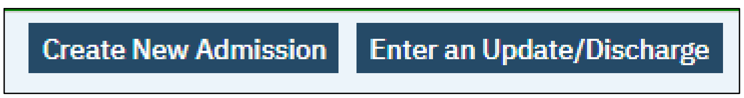
Outside Provider Client Tracking List Page



Toolbar

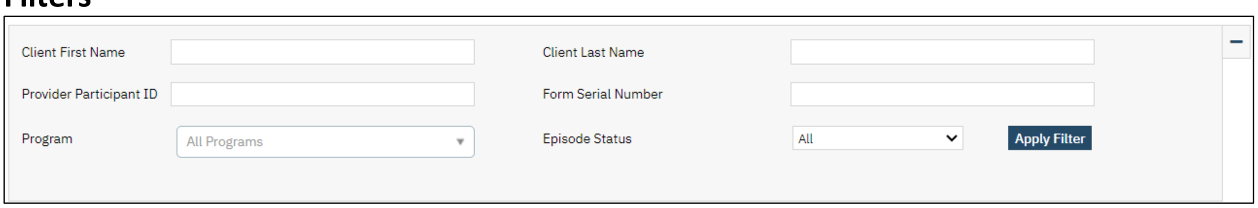
The toolbar displays two icons:

- 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



- Client First Name

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- 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.
- 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

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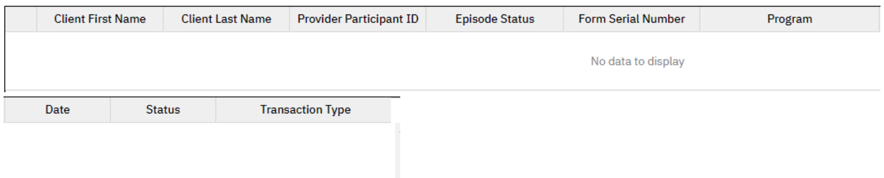
Global Codes

Field Name	Global Code Category Name
Episode Status	EPISODESTATUS

Grid



- 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
  - Label. This is a read only field.

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   - 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.

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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

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Screens	CalOMS Outside Provider Client Tracking List Page

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