CalOMS Reporting User Guide

Standalone CalOMS and CalOMS Update/Discharge Workflow

Version 4.1
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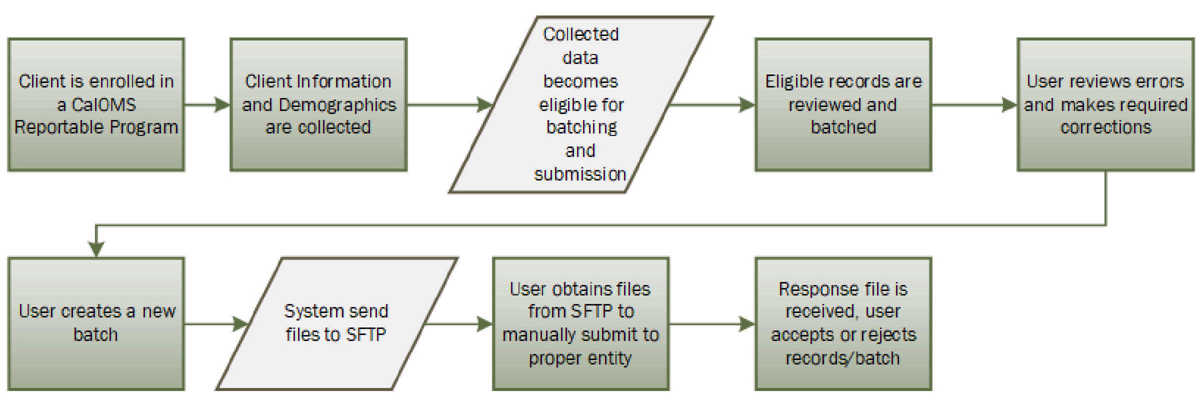
Overview

Caloms Data is a set of data reported for all clients who receive Substance Abuse services in the state of California. 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. The TEDS Episode is a SmartCare construct that allows for the tracking of enrollments to reportable services to be grouped by customer defined Episodes and Service Types. This grouping allows for data specific to the reportable episode to be grouped as such rather than being bound to a particular Program Assignment. The structure and granularity of the episodes is customer configurable, please reference the California TEDS Set Up Guide for additional details.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

A high level overview of the data collection and reporting process is shown in this visual. These processes will be outlined in more detail throughout the document.



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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 and is available to be batched in a Batch Submission.
    - Once a record is moved to a batched or canceled status it can be returned to a status of In Progress for rebatching when needed. See the Resubmitting Rejected/Canceled Records section of this User Guide
- Cancel = a record was created and batched for submission in error. The record was then later canceled. A record with a status of Cancel is not able to be included in a batch.
- Sent = the record was batched for submission and is awaiting response. A record with a status of Sent is not able to be included in a batch.
- Accepted = A response file was received for the batch the record was included in and the record was marked as Accepted. A record with a status of Accepted is not able to be included in a batch.
- Reject = A response file was received for the batch the record was included in and the record was marked as Rejected. A record with a status of Rejected not able to be included in a batch.

The action dropdown in the toolbar can be used to update the record statuses as follows, additional details on the specifics for each of these workflows can be found later on in this guide.

1. Accept Records
    a. Records can be accepted only if the selected record(s) are in a batch.

   b. If a user tries to accept the record(s) which are not in a batch a system validation will be displayed and read "Please create a batch for all selected records"
   c. Records can be accepted only if the selected record(s) status is Sent
2. Cancel Records
   a. Records can be canceled only if the selected record(s) status is Sent
   b. If the user tries to cancel the record(s) which are accepted then a system validation will display and read "Accepted records cannot be canceled."
   c. If the user tries to reject the records which are canceled a system validation will display and read "Please complete refresh action on the selected record and change the status".
3. Reject Records
   a. Records can be rejected only if the selected record(s) status is Sent.
   b. If the user tries to reject the record(s) which are accepted, a system validation will display and read "Accepted records cannot be rejected."
   c. If the user tries to reject the record(s) which are canceled a system validation will display and read "Please complete refresh action on the selected record and change the status".
4. Refresh Records
   a. Records can be refreshed only if the selected record(s) status is not Accepted.
   b. If the user tries to refresh the record(s) which are accepted a system validation will display and read "Accepted records cannot be refreshed."
5. Create Batch Submission
   a. Batch should be created if all the records selected are in status of in progress, or else a system validation will display and read "PLEASE SELECT NON-ERROR RECORDS FOR BATCH CREATION"
   b. When batch is created the record status is changed to Sent.
   c. When records selected for a batch are reportable to multiple counties a batch is created for each county in the county specific format.
   d. A batch cannot be created for records already in a batch until the records have been refreshed and are in a status of In Progress, if user try to create otherwise system validation will display and read "PLEASE SELECT NON-BATCH RECORDS FOR CREATING BATCH WITH OUT ERROR"
6. Create Batch Submission with errors
   a. Batch can be created only for in progress and error records
   b. Batch cannot be created for records already in the batch until the records have been refreshed and are in a status of Error, if user try to create otherwise it should show validation as "PLEASE SELECT NON-BATCH RECORDS FOR CREATING BATCH WITH ERRORS"

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
  - This date range is based on the completion date of the document that was used to collect the data. In most cases this will be the date that the document signed or for Services is when the Service record status is moved to 'complete'.
- 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
- 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.
   a. Details regarding the errors and steps for resolution can be found in the Error Message List Page.

i. Details regarding the errors and steps for resolution can be found in the Error Message List Page. Reference the Error Message List Page section of this guide for additional information.

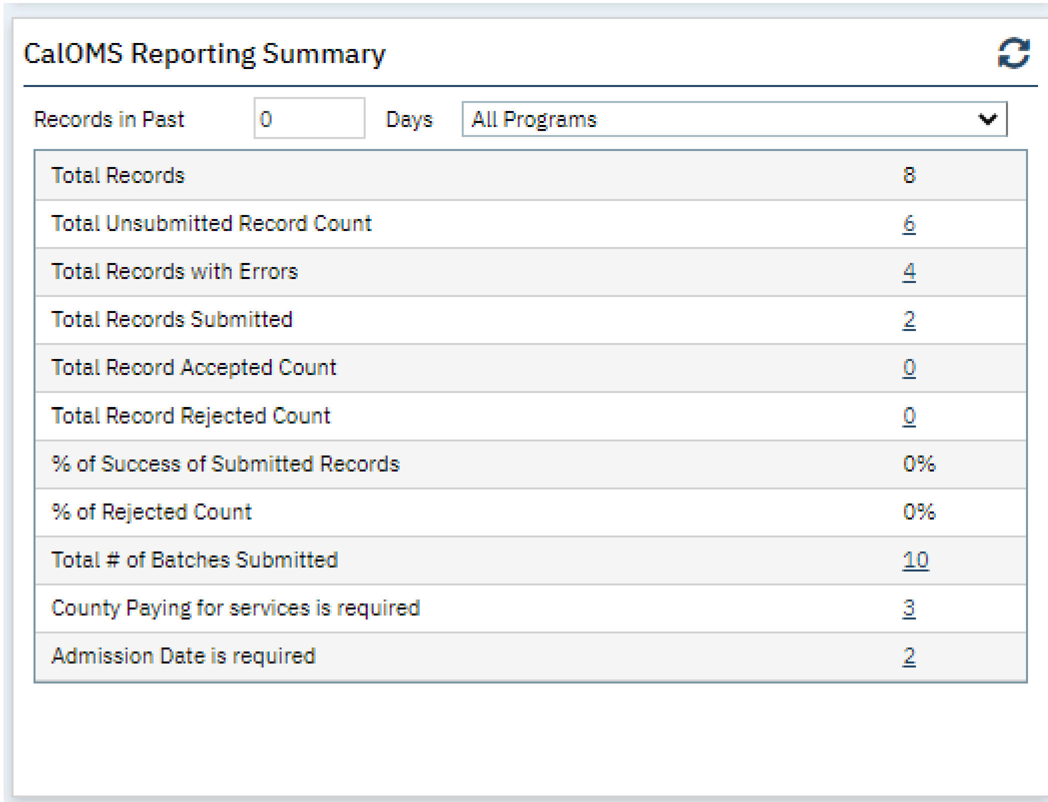
5. Once data has been corrected, navigate back to the CalOMS Reporting Summary List page and use the check box to select the record(s) that have been corrected then select Refresh Data from the Action drop down to pull the corrected data into that record to later be batched for submission.

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
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.



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.
- 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.
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.

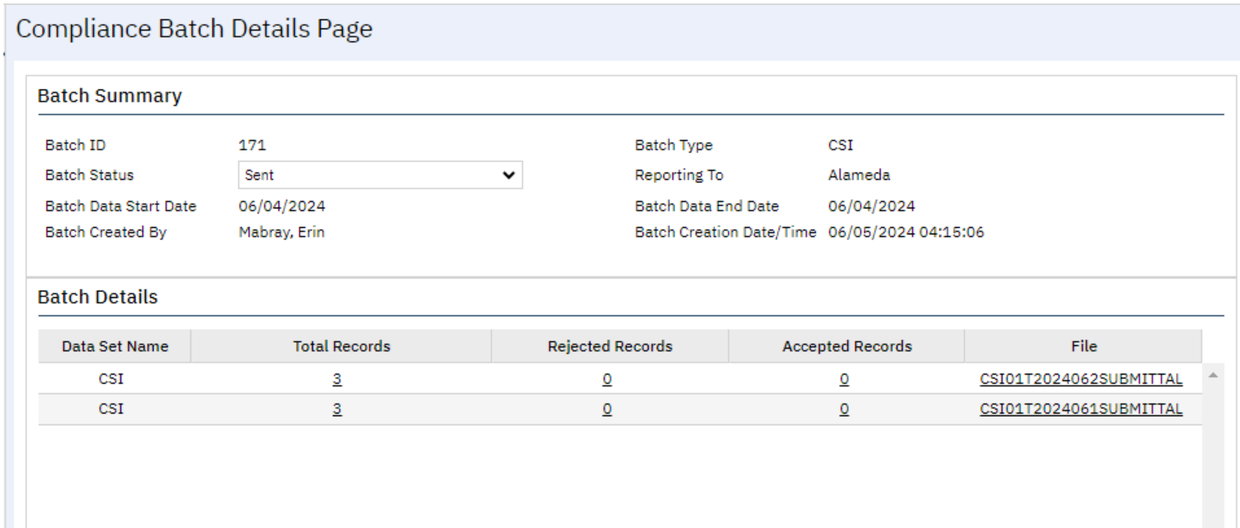
1. Navigate to the Compliance Batch List Page using the search or Quicklinks as applicable.
2. Filter for Batch Type = CalOMS
3. Select other filters as appropriate.
4. Click Apply to refresh the List Page results.
5. Select the desired batch by clicking the Batch ID hyperlink, this will direct you to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

Regenerating a Batch

In situations where a batch has been created and data is updated in those records prior to submission the batch can be regenerated.

1. Navigate to the CSI Reporting Summary List Page and select all records that were included in the batch.
2. Once the records are selected choose the Refresh Data selection from the dropdown action in the toolbar.
3. Confirm that system displays the 'Action Processed Successfully' message
4. Navigate to the Compliance Batch List page
5. Filter for the previously generated batch.

6. Select the batch and choose ‘Regenerate File’ from the dropdown action in the toolbar.
7. Once the action has processed open the Batch Detail by clicking the Batch Id
8. A second version of the file is now available in the batch details for download or by navigating to the customer’s SFTP.



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.
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.

Order of Operations for Accepting or Rejecting Batches and Records

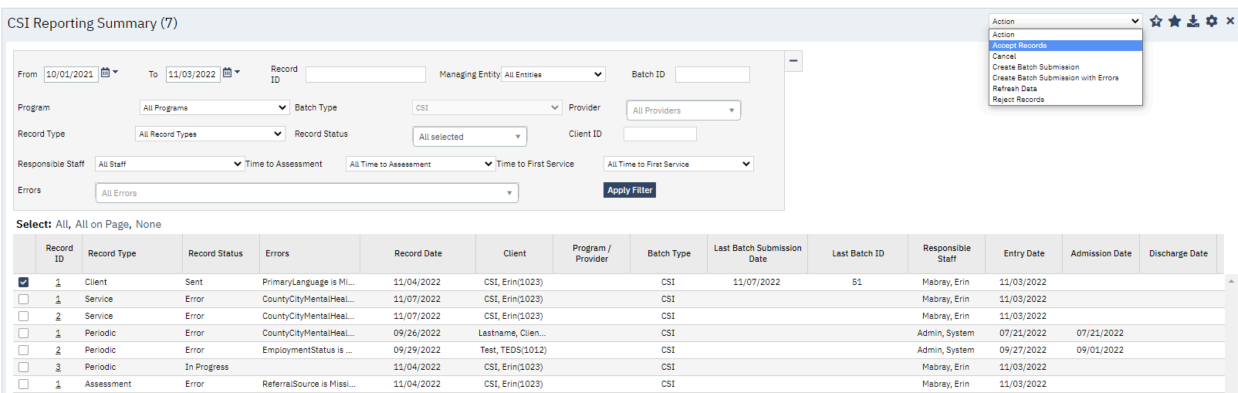
When proceeding to mark Batches as accepted or rejected it is important to first consider the status of the records that were included in the batch. Since the status of Accepted or Rejected records cannot be modified without completing a refresh action on the records, record statuses that are different from the Batch status should be handled first.The following workflows are recommended.

1. When a Batch is accepted and all records within the batch are also accepted, mark the Batch as ‘Accepted’. This will update the status of all records within the batch to ‘Accepted’
2. When a Batch is rejected and all records within the batch are also rejected, mark the Batch as ‘Rejected’. This will update the status of all records within the batch to ‘Rejected’
3. When a Batch is accepted, but one or more individual records are rejected, first mark the individual records as ‘Rejected’ then update the Batch status to ‘Accepted’. This will update the status of any records that were not rejected to ‘Accepted’ and records previously marked as ‘Rejected’ will maintain their status.

Resubmitting Rejected/Canceled records

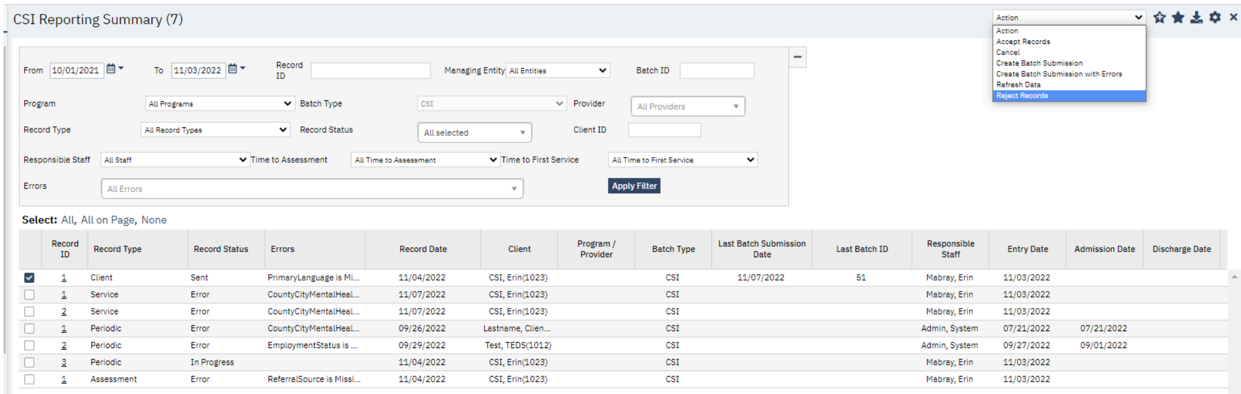
Below are the instructions for scenarios when batched items are canceled or rejected and need to be refreshed and requeued to in progress status for resubmission. This workflow is to be used when the data is allowed to be re-sent with the original record ID when applicable.

1. Filter for the records with status of Rejected/Canceled
2. Work the errors in these records if there are any
3. Once clean, select the checkboxes for the records that need to be refreshed
4. Upon selecting the checkboxes, selecting the Action dropdown as ‘Refresh data’
5. You will receive a confirmation prompt. Click ‘OK’ to proceed
6. You will now see that the Rejected/Canceled records are changed to the status of ‘In Progress’.
7. Your records are now ready to be included in the next submission



To mark records as rejected:

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 reject using the check boxes, clicking All or All or Page.
4. Use the Action drop down to select Reject Records.

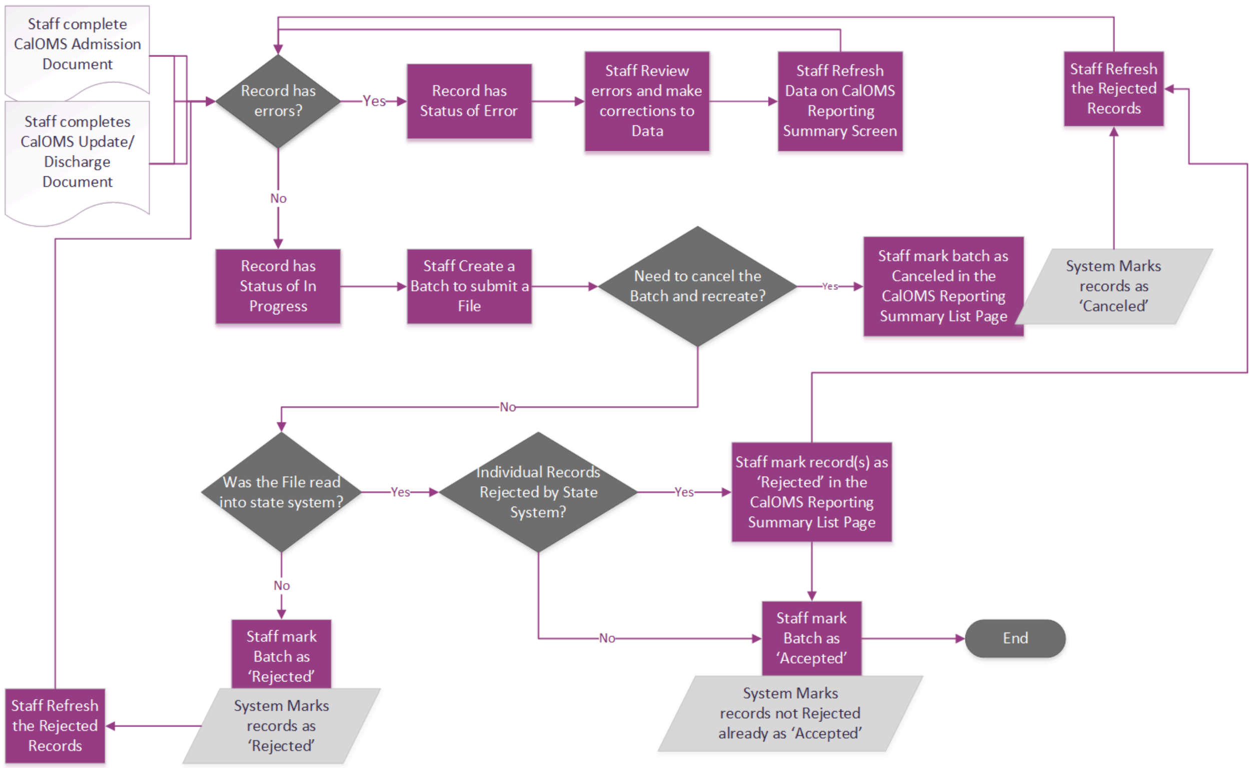


Record ID	Record Type	Record Status	Errors	Record Date	Client	Program / Provider	Batch Type	Last Batch Submission Date	Last Batch ID	Responsible Staff	Entry Date	Admission Date	Discharge Date
1	Client	Sent	PrimaryLanguage is Mi...	11/04/2022	CSI, Erin(1023)		CSI	11/07/2022	51	Mabray, Erin	11/03/2022		
1	Service	Error	CountyCityMentalHeal...	11/07/2022	CSI, Erin(1023)		CSI			Mabray, Erin	11/03/2022		
2	Service	Error	CountyCityMentalHeal...	11/07/2022	CSI, Erin(1023)		CSI			Mabray, Erin	11/03/2022		
1	Periodic	Error	CountyCityMentalHeal...	09/26/2022	Lastname, Clien...		CSI			Admin, System	07/21/2022	07/21/2022	
2	Periodic	Error	EmploymentStatus is ...	09/29/2022	Test, TEDS(1012)		CSI			Admin, System	09/27/2022	09/01/2022	
3	Periodic	In Progress		11/04/2022	CSI, Erin(1023)		CSI			Mabray, Erin	11/03/2022		
1	Assessment	Error	ReferralSource is Missi...	11/04/2022	CSI, Erin(1023)		CSI			Mabray, Erin	11/03/2022		

In scenarios where a record has been batched, sent, rejected, and a new record id is required the following workflow is used.

1. Filter for records with a status of Rejected or Canceled
2. Identify the records that are required to be modified and re-sent with a new record id.
3. Click the Effective Date hyperlink to navigate to the document used to collect the data.
4. From the document, use the ‘Edit’ feature to create a new version of the document
5. Once complete, sign the document as complete.
6. Navigate back to the CSI Reporting Summary List Page and, if needed, adjust filters to include the completed document.
7. This document version 2 or greater will create a new reporting record.
8. If needed, review and resolve errors for the new record.
9. Once the record is in a status of In Progress it can then be included in a new batch for submission.

In Summary, this is an overview workflow of the steps to follow in the process of reporting data to the state and re-entering the response data from the state.



Error Message List Page

The Error Message List Page provides a location where a user can see all of the possible errors for a given type of California Reporting. The list page is intended to be used as a guide for staff to know where to look to troubleshoot an error on a record.

Navigating to the Error Message List Page

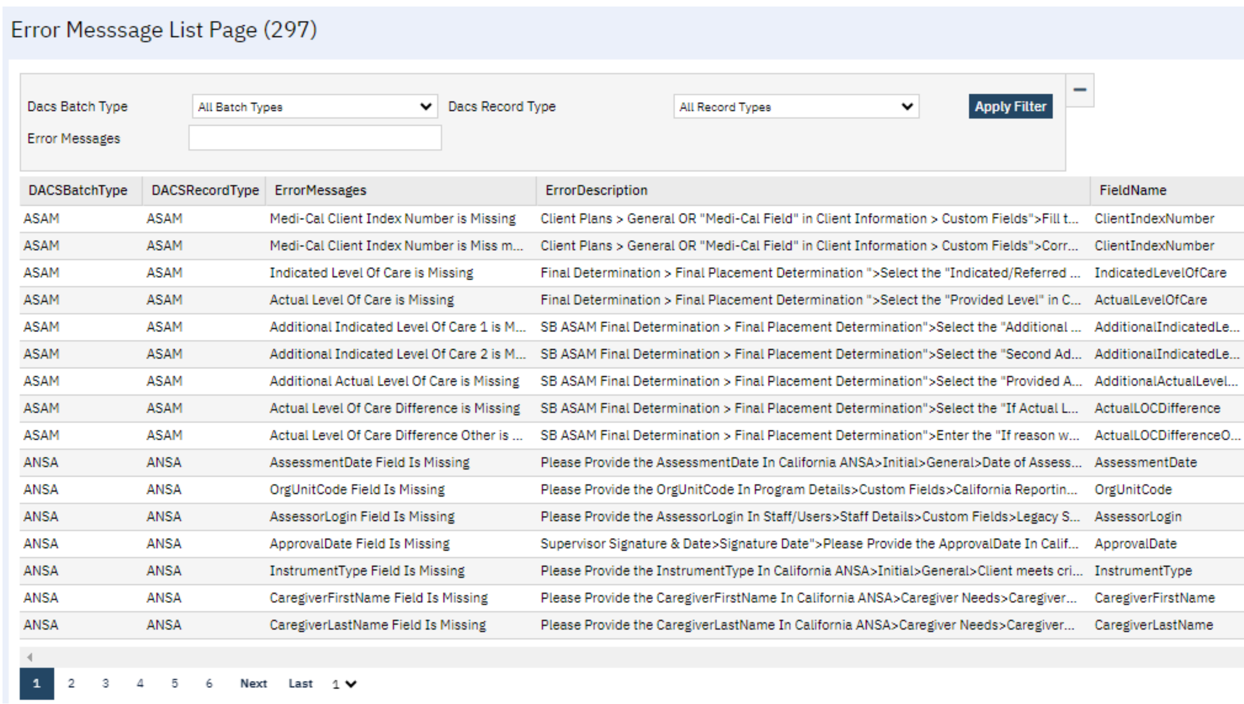
1. Search for the Error Message List Page (My Office) using the Search icon. Click on the Error Message List Page in the typable drop down. This will open the Error Message List Page
2. Alternatively, locate the Error Message List Page using the Quicklink if this has been configured in your environment

Filtering the Error Message List Page:

- In the List page, you can filter for the Batch Type and the Record Type for which you wish to see the error messages for
- You can also filter by the Error message by typing in all or some part of the error message

Once filtered, the list page displays a list of errors with following details:

- Batch Type - This column displays the type of Batch that the error belongs to
- Record Type - This column displays the type of Record that the error belongs to
- Error Messages - This column displays the Error message that would be displayed in the Reporting List page
- Error Description - This column provides details of the location for where data can be entered/updated to correct the error
- Field Name - This column displays the File field name that the error belongs to


Error Messsage List Page (297)

Dacs Batch Type: All Batch Types | Dacs Record Type: All Record Types | Apply Filter

Error Messages:

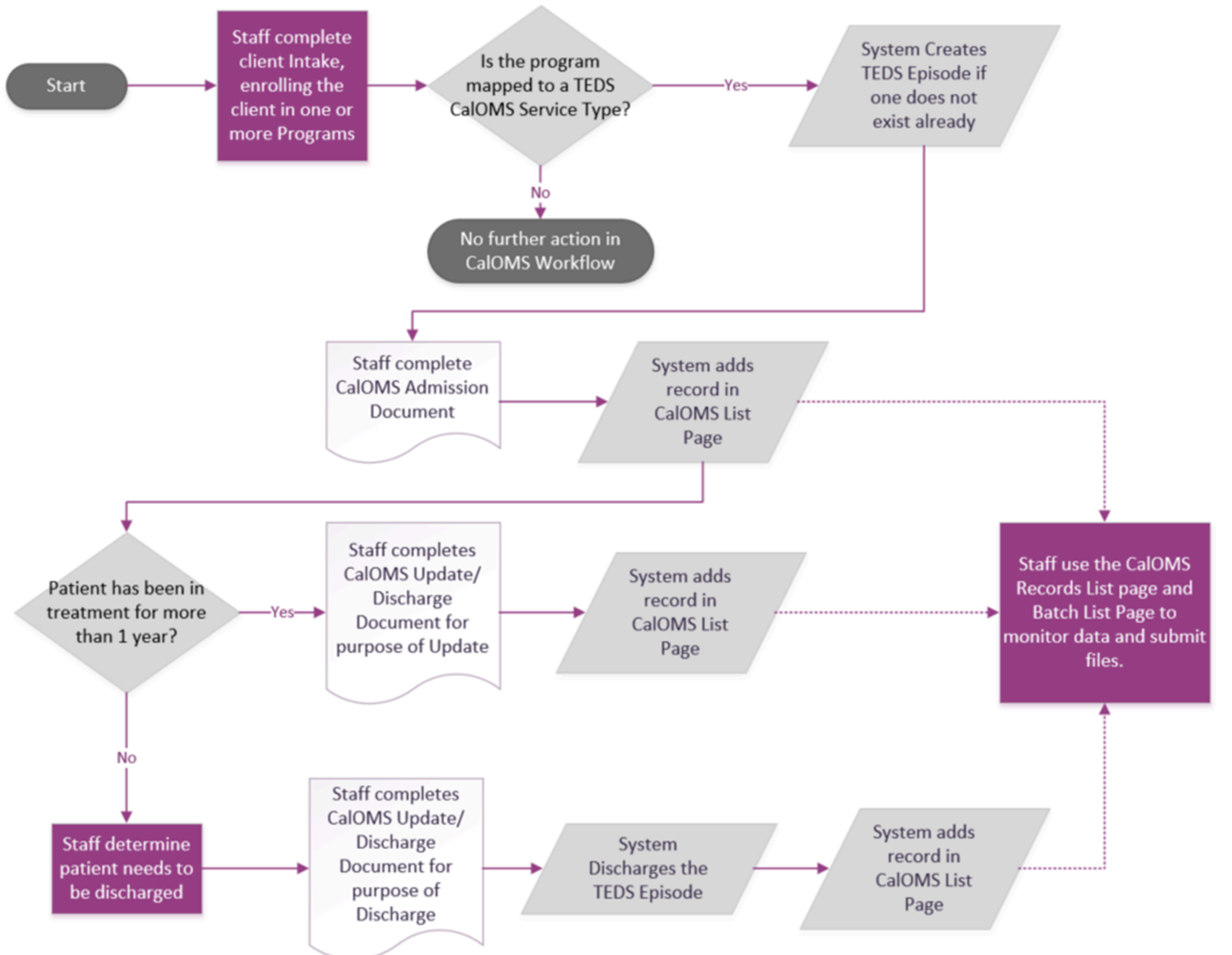
DACSBatchType	DACSRecordType	ErrorMessages	ErrorDescription	FieldName
ASAM	ASAM	Medi-Cal Client Index Number is Missing	Client Plans > General OR "Medi-Cal Field" in Client Information > Custom Fields">Fill t...	ClientIndexNumber
ASAM	ASAM	Medi-Cal Client Index Number is Miss m...	Client Plans > General OR "Medi-Cal Field" in Client Information > Custom Fields">Corr...	ClientIndexNumber
ASAM	ASAM	Indicated Level Of Care is Missing	Final Determination > Final Placement Determination ">Select the "Indicated/Referred ...	IndicatedLevelOfCare
ASAM	ASAM	Actual Level Of Care is Missing	Final Determination > Final Placement Determination ">Select the "Provided Level" in C...	ActualLevelOfCare
ASAM	ASAM	Additional Indicated Level Of Care 1 is M...	SB ASAM Final Determination > Final Placement Determination">Select the "Additional ...	AdditionalIndicatedLe...
ASAM	ASAM	Additional Indicated Level Of Care 2 is M...	SB ASAM Final Determination > Final Placement Determination">Select the "Second Ad...	AdditionalIndicatedLe...
ASAM	ASAM	Additional Actual Level Of Care is Missing	SB ASAM Final Determination > Final Placement Determination">Select the "Provided A...	AdditionalActualLevel...
ASAM	ASAM	Actual Level Of Care Difference is Missing	SB ASAM Final Determination > Final Placement Determination">Select the "If Actual L...	ActualLOCDifference
ASAM	ASAM	Actual Level Of Care Difference Other is ...	SB ASAM Final Determination > Final Placement Determination">Enter the "If reason w...	ActualLOCDifferenceO...
ANSA	ANSA	AssessmentDate Field Is Missing	Please Provide the AssessmentDate In California ANSA>Initial>General>Date of Assess...	AssessmentDate
ANSA	ANSA	OrgUnitCode Field Is Missing	Please Provide the OrgUnitCode In Program Details>Custom Fields>California Reportin...	OrgUnitCode
ANSA	ANSA	AssessorLogin Field Is Missing	Please Provide the AssessorLogin In Staff/Users>Staff Details>Custom Fields>Legacy S...	AssessorLogin
ANSA	ANSA	ApprovalDate Field Is Missing	Supervisor Signature & Date>Signature Date">Please Provide the ApprovalDate In Calif...	ApprovalDate
ANSA	ANSA	InstrumentType Field Is Missing	Please Provide the InstrumentType In California ANSA>Initial>General>Client meets cri...	InstrumentType
ANSA	ANSA	CaregiverFirstName Field Is Missing	Please Provide the CaregiverFirstName In California ANSA>Caregiver Needs>Caregiver...	CaregiverFirstName
ANSA	ANSA	CaregiverLastName Field Is Missing	Please Provide the CaregiverLastName In California ANSA>Caregiver Needs>Caregiver...	CaregiverLastName

1 2 3 4 5 6 Next Last 1

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 requirements for Submissions, Re-Submission and Deletions. So the following is the recommended workflow for collecting data for each CalOMS Episode. Please see the user guides for the documents referenced for more information on how to complete those documents.

1. Client is enrolled in a Program.
    a. If the Program is mapped to a CalOMS Episode Type and there is not already an Episode for this client for the Episode Type, a new TEDS Episode is created for the client.
2. Staff create a new CalOMS Admission Document and select the TEDS Episode Name to collect the CalOMS data needed for Admission.
    a. This document is reported as a CalOMS Admission record.
3. Staff create a new CalOMS Update/Discharge Document for purpose of Update if the client is in treatment for one year since the last CalOMS data collection. This is repeated throughout the course of treatment.
    a. This document is reported as a CalOMS Update record.
4. Staff create a new CalOMS Update/Discharge Document for purpose of Discharge when the client is being discharged from all programs linked to the TEDS Episode. This document collects all of the data needed at the time of discharge.
    a. This document is reported as a CalOMS Discharge record.



Below is a summary of the fields in the CalOMS files and which Screen in SmartCare the data is collected in. 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 CalOMS Outside Provider Admission	ADM-2 Admission Transaction Type ADM-5 Source of Referral ADM-6 Days Waited to Enter Treatment ADM-7 Number of Prior Episodes	Admission File

SmartCare Screen	Description of Data	File Reported To
	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	
CalOMS Admission CalOMS Update/Discharge CalOMS Outside Provider Admission CalOMS Outside Provider 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 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)	Admission File Annual Update File Discharge File

SmartCare Screen	Description of Data	File Reported To
	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 CalOMS Outside Provider Discharge	DIS-1 Discharge Date	Discharge File
CalOMS Update CalOMS Outside Provider Update	AUP-1 Annual Update Date AUP-2 Annual Update Number	Annual Update File
CalOMS Update/Discharge CalOMS Outside Provider	MED-6 Pregnant at Any Time During Treatment	Annual Update File Discharge File

SmartCare Screen	Description of Data	File Reported To
Update/Discharge		
Client Information CalOMS Outside Provider Admission CalOMS Outside Provider Update/Discharge	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-11Special 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

Outside Provider Reporting Considerations

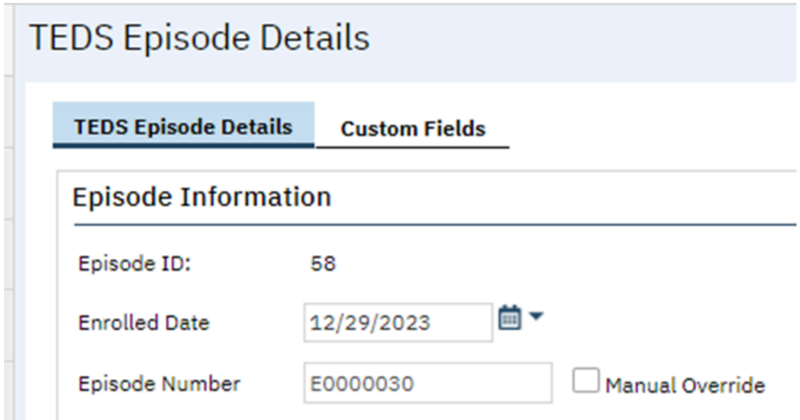
CalOMS data collected using the Outside Provider screens is pulled into the reporting records and files in most of the same ways as the data collected using Client Documents with the exception of Client Information. These differences are outlined above, as Outside Provide Client data is entered under a SmartCare Organizational Client, information typically pulled from Client Information is entered into the Outside Provider CalOMS Documents. Once the Outside Provider CalOMS Documents are complete, the data is reflected in the CalOMS Reporting Summary and Record Details identical to the data collected using the Client Documents, there is not distinction between SmartCare Client and Outside Provider Client data in the CalOMS Reporting Summary List or CalOMS Record Details.

Data Migration Considerations

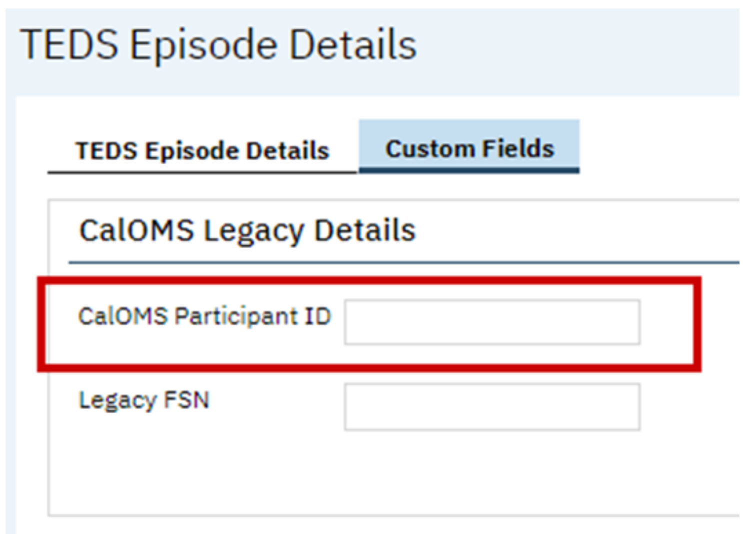
For Client records where the Client has an open CalOMS Episode that will be continuing care once the Streamline customer is live on SmartCare, data migration is required PRIOR to go live. If it is done after go live, there is a risk of needing additional data clean up as the Program creations that start on the Go Live date can trigger TEDS Episode creations.

Here is an overview of the Data Migration required for go live:

1. Migration of the TEDS Episode Setup.
    a. The migration or creation of TEDS Episodes for all CalOMS Episode Types needed. Note, for every unique FSN number needed in a client record, the system must have a unique Teds Episode Type.
    b. The mapping of Programs to Teds Episode Type and Service Type combinations.
        i. Each Program that should be linked as a program to create or end a Client's TEDS Episode Type should be mapped to the ONE Teds Episode Type + Service Type combination. It should not map to more than one.
2. Migration of the Client's Teds Episodes: The Client Program Enrollments being migrated then need to be mapped to the TEDS Episode Type +Service Type combination that Program is linked to. This mapping will create the TEDS Episodes then for the Client in Smartcare.
    a. Episode Number of the TEDS Episodes for a client should be the FSN
    b. Each Client's TEDS Episode MUST have a unique Episode Number.



c. If the CalOMS Participant ID for a Client does not match the SmartCare Client ID, then the Client's TEDS Episode needs to have the CalOMS Participant ID populated with the ID currently submitted from the legacy system.



In addition to the required TEDS Episode migrations for the system setup and the Clients' TEDS Episodes, it is optional to also migrate the last CalOMS Data Set. This will be created in SmartCare as either a CalOMS Standalone Admission Document or CalOMS Standalone Update/Discharge Document based on the tables migrated. This is optional as reporting can continue without these documents being migrated. And if migrated the benefit is that then when a user creates the next CalOMS Standalone Update/Discharge document the system will initialize the data from the legacy Document created. Here are the recommendations for how to decide whether to migrate the CalOMS Standalone Admission document or CalOMS Standalone Update/Discharge document.

1. You could use your legacy system data to determine if the last entry for a client was for the Admission or for an Update. Then use the correct tables to migrate the data according to this.
2. The Data Migration instructions and Streamline Data Integration team can assist with which tables need to be migrated to create the two different documents.

Note: You should NOT migrate any data for Clients' TEDS Episodes which are Discharged prior to your go live date. All data for those CalOMS records would be reported out of the legacy system and are not needed in SmartCare.

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.

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.
    a. This Program Assignment must also be associated to a TEDS Episode which was either migrated or system generated. For details on how Programs are associated with TEDS Episode please reference the California TEDS Setup User Guide.

2. The client must have a completed CalOMS Admission

CalOMS Admission Re-Submission

When a previously submitted 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.
    a. This Program Assignment must also be associated to a TEDS Episode which was either migrated or system generated. For details on how Programs are associated with TEDS Episode please reference the California TEDS Setup User 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 Admission where the version number of that document is greater than version 1 and the Signature Date (Entry Date) occurred after the CalOMS Admission Submission was batched.

CalOMS Admission Deletion

When a previously submitted 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.
    a. This Program Assignment must also be associated to a TEDS Episode which was either migrated or system generated. For details on how Programs are associated with TEDS Episode please reference the California TEDS Setup User 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 Admission where the status of the document is Error the Error Date occurred after the CalOMS Admission Submission was accepted .

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.
    a. This Program Assignment must also be associated to a TEDS Episode which was either migrated or system generated. For details on how Programs are associated with TEDS Episode please reference the California TEDS Setup User Guide.
2. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
    a. If an Admission is not present in SmartCare the system will not prevent the creation of the Annual Update record however this may cause a fatal error from the state.
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 previously submitted 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.
    a. This Program Assignment must also be associated to a TEDS Episode which was either migrated or system generated. For details on how Programs are associated with TEDS Episode please reference the California TEDS Setup User Guide.
2. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
    a. If an Admission is not present in SmartCare the system will not prevent the creation of the Annual Update record however this may cause a fatal error from the state.

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 and the Signature Date (Entry Date) occurred after the CalOMS Annual Update Submission was batched.

CalOMS Annual Update Deletion

When a previously submitted 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.
    a. This Program Assignment must also be associated to a TEDS Episode which was either migrated or system generated. For details on how Programs are associated with TEDS Episode please reference the California TEDS Setup User 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 Document Status is Error and the Error Date occurred after the CalOMS Annual Update Submission was accepted.

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.
    a. This Program Assignment must also be associated to a TEDS Episode which was either migrated or system generated. For details on how Programs are

associated with TEDS Episode please reference the California TEDS Setup User Guide.

5. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
    a. If an Admission is not present in SmartCare the system will not prevent the creation of the Annual Update record however this may cause a fatal error from the state.
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.
    a. This Program Assignment must also be associated to a TEDS Episode which was either migrated or system generated. For details on how Programs are associated with TEDS Episode please reference the California TEDS Setup User Guide.
6. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
    a. If an Admission is not present in SmartCare the system will not prevent the creation of the Annual Update record however this may cause a fatal error from the state.
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 and the Signature Date (Entry Date) occurred after the CalOMS Discharge Submission was batched.

CalOMS Discharge 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 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.
    a. This Program Assignment must also be associated to a TEDS Episode which was either migrated or system generated. For details on how Programs are associated with TEDS Episode please reference the California TEDS Setup User Guide.
6. The client must have a completed CalOMS Admission that has been accepted by the entity it was reported to.
    a. If an Admission is not present in SmartCare the system will not prevent the creation of the Annual Update record however this may cause a fatal error from the state.
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 and the Error Date occurred after the CalOMS Discharge Submission was accepted.

Form Serial Number (FSN)

Following the enrollment to a Program which has the required CalOMS setup outlined in the Programs section of this guide as well as the TEDS set up outlined in the California TEDS Set Up User Guide, a TEDS Episode will be created for the client. This will be done via a job that is scheduled to run automatically. 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 which is the episode identifier for all CalOMS transactions within the episode. If needed, this field can be manually updated.

Annual Update Number

The Annual Update Number is a calculated field that 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. This field is editable and edits made will be pulled into the reporting record. Some customers may choose to Hot Key permission this field so that only certain users are able to modify the sequence of the number. Edits made to this field will be considered in the calculation of the Annual Update Number for future CalOMS Annual Updates.

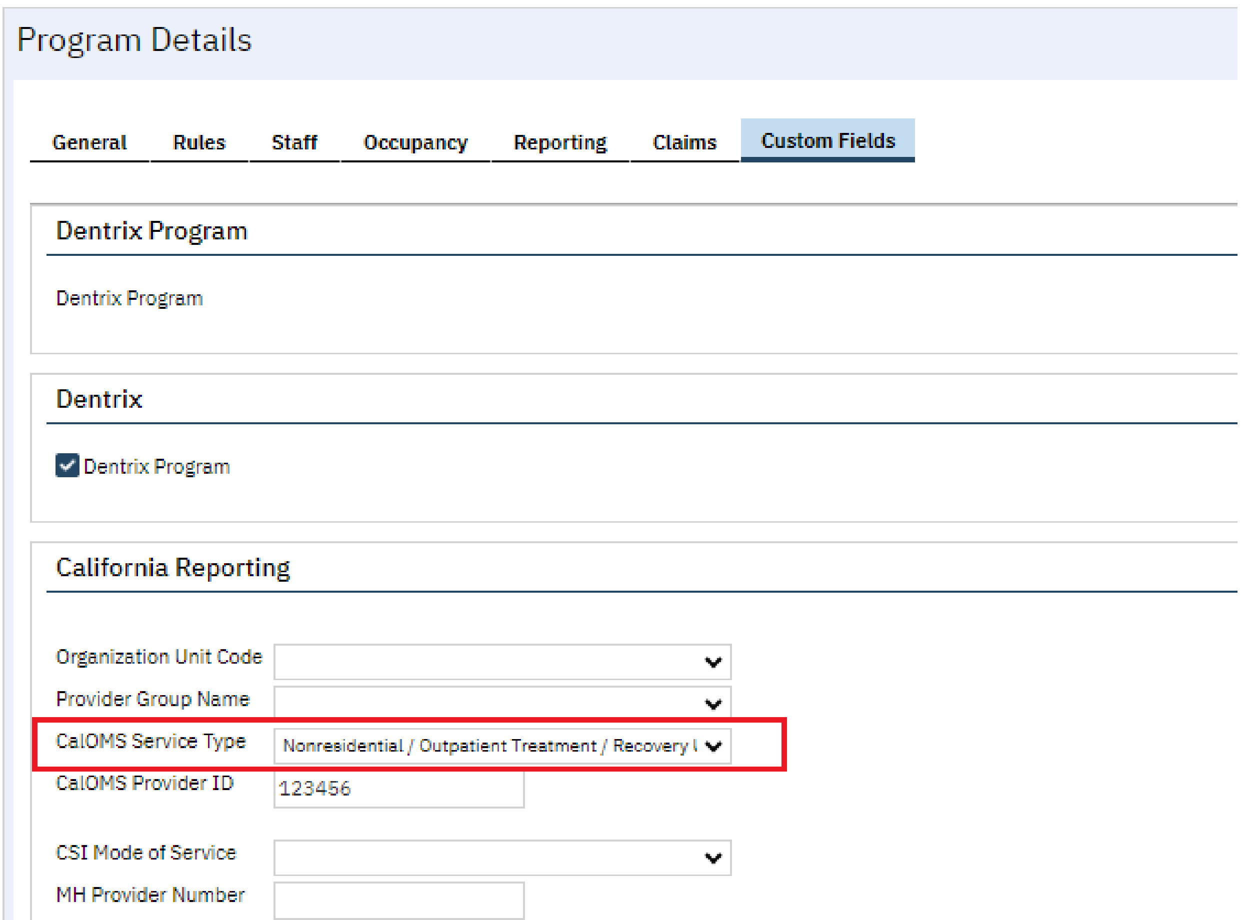
Field Specific Logic

CID-7 SSN

The Client Social Security Number is reported from the SSN located on the Client Information Screen. If the value entered in SSN equals ‘999-99-9999’ or ‘000-00-000’ then the file will automatically report ‘99902’ as allowed by the state.

ADM-4 Type of Service

The Type of Service is reported from the ‘CalOMS Service Type’ dropdown field that is present in the Custom fields tab of the Program details screen. The field is bound to the Global Code Category - CalOMSServiceType



CID-2 Provider's Participant ID

To report the Provider's Participant ID, the system first looks at the 'Legacy Participant ID' field on the Custom fields tab of the TEDS Episode Details screen for the client. If there is no data entered in that field, then the Smartcare ClientId is reported.

CID-4 Date of Birth

The Client Date of birth is reported from the Date of birth field located on the Client Information Screen.

CalOMS Resubmission Record Logic

When there is a change in one or more of the 13 key fields (noted below) in a Client's CalOMS submission from the most recent, previously Accepted submission, the state requires a resubmission of ALL previous CalOMS records with the updated key demographic fields. This is done via an SQL job that looks for the changes in these fields and thus triggers an automatic resubmission of all previous records with the updated demographic fields of data.

13 UCI data fields
CID-3 - Gender
CID-4 - Date of Birth
CID-5 - Current First Name
CID-6 - Current Last Name
CID-7 - SSN
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

Below is how the process works:

1. When the user creates ANY of the following CalOMS Documents and signs the document as complete. A CalOMS submission record is created.
    a. CalOMS Admission
    b. CalOMS Standalone Update Discharge

   c. SUD Services Registration
   d. CalOMS Update Discharge
   e. Outside Provider Admission
   f. Outside Provider Update/Discharge
2. Once the record is created the system will check the 13 UCI data fields against the last sent and accepted CalOMS record for the Client ID. This includes records OUTSIDE of the FSN associated with the current record.
3. If the 13 fields match, the system process stops at creating the submission record for the completed document.
4. If there is a mismatch in 1 or more of the 13 fields the Resubmission record creation process is triggered. Example: CID-6 - Current Last Name - Last name is mismatched from previous submission
5. The system then identifies the first Admission for the associated Client ID where the record status = Accepted. If record status is not equal to Accepted, the system will refresh the record with most recent data.
6. The system then creates an Admission Resubmission (Type of Form: 2) updating the mismatched value(s) in Admission to match the most recently completed record values.
7. The system then checks if there are existing Annual Updates where the FSN matches the Admission Resubmission FSN. If yes, the system then creates Annual Update Resubmission(s), in sequential order if multiple exist, updating the mismatched values(s) in the Annual Update to match the most recently completed record values.
8. Then the system checks if there is a Discharge where the FSN matches the Admission Resubmission FSN. If yes, the system then creates a Discharge Resubmission, updating the mismatched values(s) in the Discharge to match the most recently completed record values.
9. Once the resubmission records are created for all records associated with the first FSN the system will then complete a check for any additional Admission records for the same Client ID.
10. If they exist, the system repeats steps 7-9 for all subsequent episodes
11. The system will work the Admission records and all corresponding Annual Updates and Discharges before moving on to the next Admission record
12. Once the records are Accepted, a system generated document version will be created where updated fields match the accepted record, Author = system, Signature date = resubmission record creation date

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.

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.

System Jobs

Job Name:California DACS Record Refresh

This job will be loaded into your system to refresh any changes made to reportable records on a nightly basis. Any new versions of documents or changes made to system configuration will be pulled into the record by this job each night. Alternatively, the user can manually refresh the record by selecting the records and using the Refresh action explained earlier in this guide. Please also see the next Job outlined in this section for details about refreshing large numbers of records.

Job Name: California DACS Batch Record Actions

When the Reporting List includes more than 10,000 records being manually refreshed the refresh will not occur immediately. Rather the job will be triggered and will run for 15 minutes. Refresh records with less than 10,000 records will be processed in real time.

Job Name: CalomsResubmissionRecords

When there is a change in one or more of the 13 UCI fields in a Client's CalOMS submission from the most recent, previously Accepted submission, the state requires a resubmission of ALL previous CalOMS records with the updated key demographic fields. This is done via an SQL job that runs nightly to look for the changes in these fields and thus triggers an automatic resubmission of all previous records with the updated demographic fields of data.

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 can be set. The format must be an alpha character followed by a 0.

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	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. To set the configuration key find the FIPS County Code in the following table and enter it into the Value field.

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
6019	Fresno	6049	Modoc	6079	San Luis Obispo	6109	Tuolumne

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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

Version Control

Revision Date	Description	Updated By
11/22/22	Update System Setup to include Recode for the FSN seed value	Erin Mabray
12/28/23	Update Field Specific Logic	Neha Sonkamble
6/19/2024	Clarified workflows and list page logic.	Erin Mabray
7/25/24	Updated CalOMS Resubmission logic	Neha Sonkamble

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