

**Department of Health Care Services
SUD Prevention, Treatment and Recovery Services Division
Policy and Prevention Branch
CalOMS Prevention
FY 2015-16 Version
New Features and Reminders**

This document provides information on new features and reminders for the California Outcome Measurement Service for Prevention (CalOMS Pv), the Department of Health Care Services' (DHCS) data collection system for substance use primary prevention services.

County and Provider Sites:

New! Fiscal Year Version for 2015-16

The Fiscal Year (FY) 2015-16 version of the CalOMS Pv will be available as of July 8, 2015. As of this date, the CalOMS Pv log-in page located at <https://caprev.onmosaix.com/caprevent2015> will provide links for both the FY 2014-15 and FY 2015-16 versions of CalOMS Pv.

Once logged into either version of CalOMS Pv, the FY will be displayed in the upper middle of the screen. Validations have been integrated into each FY version to alert users if the date of service does not correspond to the FY version chosen. This will prevent Single and Recurring Services from inadvertently being entered into the incorrect FY version.

New! Individual Participant Data

Counties and providers that choose to use the Individual Participant (IP) feature when creating Groups in CalOMS Pv will have to follow new requirements this FY due to heightened Health Insurance Portability and Accountability Act (HIPAA) and confidentiality regulations regarding protecting personal identifiable data. Proper names and actual birthdates are no longer allowed.

County and provider sites that wish to continue using the IP feature must do the following after the FY 2015/16 version of CalOMS Pv is available: log into the FY 2015/16 version of CalOMS Pv. Go to the Transfer Tool located in the Administration Module and import the existing IP's. Go to the Implementation Module and click on Identify Participants within Program Management. Click on "Select" next to

Identify Participant Video Manual

The "Gender", "Birth Date" and "Race/Ethnicity" are required for demographic reporting. The information on this screen can only be viewed by the provider site entering the information. Hide Page Info

* Indicates Required Field

General Information

First Name*	<input type="text" value="a"/>	Middle Initial	<input type="checkbox"/>
Last Name*	<input type="text" value="12"/>	Gender*	<input type="text" value="Male"/>
Birth Date* (mm/dd/yyyy)	<input type="text" value="01/01/1999"/>		
Race/Ethnicity*	<input type="text" value="Multiracial or Multiethnic"/>		
Status*	<input type="text" value="Active"/>		

each name and change the first and last name of each participant to a unique code. The code can be anything, but must be tracked by the county or provider site so they can differentiate individual participants from one another. Change the birth month and day to January 1, but leave the correct birth year and click on “Save”. These requirements also apply to creating new participants. County and provider sites that choose not to use this feature will use the “Summary” option when creating Groups.

County and provider sites that are currently or planning to use IP’s must notify DHCS if they plan to use the IP feature in FY 2015/16. Please e-mail the CalOMS Pv Help Desk with the decision. Include the six-digit provider identification number and the legal entity name of the site in the e-mail. If DHCS does not receive a response from the county and provider sites that are currently using IP’s by July 17, 2015, then IP’s will be permanently deleted from the Transfer Tool and will not be available for the new fiscal year.

New! Changes to Non-Demographic Screen

A few of the service deliveries within the Environmental section of the non-demographic reporting screen have been modified to broaden their use. The word “alcohol” has been removed from three items and they now read as follows:

- Sponsorship Restrictions
- Zoning Ordinance – Retail Outlet Density
- Zoning Ordinance – New Outlets

Two service deliveries included “AOD” in the title, they now read as “ATOD” to broaden the definition to include tobacco. Refer to the updated “CSAP Strategy List and Definitions” document located in the CalOMS Pv Library for more information.

Reminder! Data Transfer Tool

On July 8, 2015, all Prevention Strategic Plans, Problem Statements, Goals, Objectives, and Progress Reports in the FY 2014-15 version of CalOMS Pv will automatically transfer over into the new FY 2015-16 version regardless of status (refer to section entitled Updating Problem Statements, Goals and Objectives). All Coalitions, Coalition Members, Coalition Sub-Committees, Training/Technical Assistance, and Staff/Users with an “Active” status in the Capacity Module, will automatically transfer.

Programs, IP’s and Identified Recurring Services do not have to be recreated at the beginning of each new fiscal year. They can be transferred manually by using the Data Transfer Tool located in the Administration Module. Only users with “Admin” privileges have permission to utilize the tool. County/Provider sites are encouraged to transfer these data items at the beginning of the new fiscal year to ensure they are available for other staff to perform data entry. If these data items are not transferred, staff

Transfer Tools
Transfer Programs, Participants, and Identified Recurring Services.
Transfer Programs
This module is used to transfer programs.
Transfer Participants
This module is used to transfer participants.
Transfer Identified Recurring Services
This module is used to transfer identified recurring services.

may needlessly create new data causing confusion if the same data items are then transferred at a later date.

Log into the new FY 2015-16 version of CalOMS Pv and proceed to the Administration Module. Scroll down to the item entitled “Transfer Tools”. Click on the + sign to expand the menu. Transfer data in the order presented on the screen. Click on “Transfer Programs” first. A list of active Programs will be listed with check boxes next to each one. Check the boxes of only the Programs that will be utilized in FY 2015-16 and then click on “Transfer Programs”. Follow these same instructions for IP’s and Identified Recurring Services.

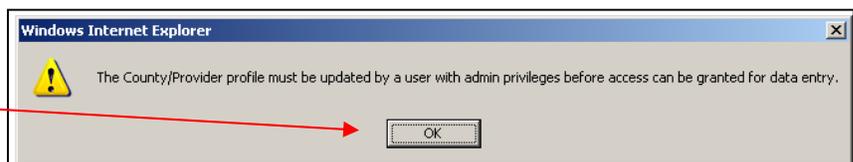
A few helpful hints:

- The Data Transfer Tool can be utilized more than once. This allows users to transfer Programs, Participants and Identified Recurring Services as needed, versus all at once. Additionally, any data that is transferred, and then deleted from the FY 2015-16 version, will reappear in the FY 2014-15 lists within the tool.
- The “Transfer Participants” and “Transfer Identified Recurring Services” screens may be empty if the county/provider site did not create any of these data items in FY 2014-15.
- **Reminder!** Groups cannot be transferred. New Groups must be created at the beginning of each new fiscal year. Programs must be transferred or new ones created before any new Groups can be created. IP’s from the previous fiscal year that will be participating in services in the new fiscal year should be transferred before non-summary Groups are created to avoid the time consuming task of re-entering all of the IP data. Please refer to the new requirements for using the IP feature located at the beginning of this document.

Reminder! Update County/Provider Profile

The data entry screens will not be accessible by any county or provider CalOMS Pv users until the staff person with “Admin” privileges at each site logs into the FY 2015-16 version of CalOMS Pv and updates the County/Provider Profile area. Prior to this being done, users will be locked out and will receive an error message prompting them to contact the staff person with “Admin” privileges. This feature ensures that each county/provider site has current contact information on file.

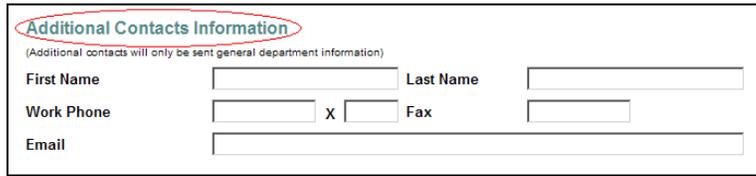
Upon log-in, the staff person with “Admin” privileges will be prompted to complete this task. Clicking on “OK” will redirect the user to the



County/Provider Profile. Scroll through the information in the screen and update where necessary. It is imperative to correctly identify the “Primary Contact” and “Secondary Contact”, as these staff will receive correspondence regarding CalOMS Pv system improvements and reporting requirements. To add a new name to the drop-down box for the contacts, save any changes that have already been made and then proceed to the Staff/User area within the Administration Module. Create the new user(s) and then

navigate back to the County/Provider Profile area and choose the new name(s) for the Primary and/or Secondary contacts from the respective drop-down menus and save.

Optional fields are available in the County/Provider Profile area to identify two additional contacts. These individuals will receive all CalOMS Pv correspondence.



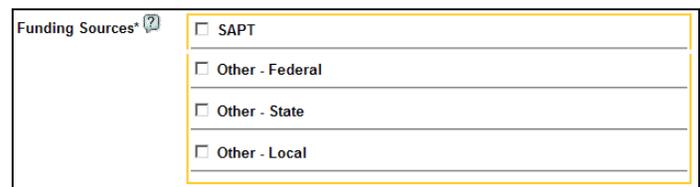
If the "Admin" user has not logged in and updated the County/Provider Profile page, all other CalOMS Pv users with privileges other than "Admin" will receive the message regarding updating the County Provider Profile area upon logging in. Click on "OK" and the following message will display. Click on "OK" and the user will be logged out of CalOMS Pv. Contact the "Admin" user at the county/provider site and request they complete the County/Provider Profile update so the other CalOMS Pv users can log in and proceed with data entry.



Reminder! Updating Funding Sources

Funding Sources must be updated and accepted for each Program transferred into the FY 2015-16 version of CalOMS Pv before data can be input for the Program.

DHCS strongly encourages each county assist their staff and providers in determining the correct funding sources for Programs. When incorrect funding sources are input, the data reflected in reports generated by funding source have no validity for DHCS, counties, or providers which ultimately results in inaccurate data in the annual Substance Abuse Prevention and Treatment (SAPT) Block Grant application. For example, in past fiscal years, the funding sources for a majority of the Programs were identified incorrectly as "Other Federal", "Other State" or "Other Local" when they should have been "SAPT".



All Programs transferred over with the Data Transfer Tool must be prompted to accept data entry. Proceed to the Implementation Module → Program Management → Identify Programs → click on "Select" next to the Program name → update the funding source(s) if necessary → click on "Save". Data entry can now be done for that Program.

To monitor the funding sources identified for all Programs in the FY 2015-16 version, log into CalOMS Pv → Reports Module → Standard Reports → Administration tab → choose and generate the report entitled "Program Funding Source". This report will reflect the funding sources and percentage of funding for each Program.

County Sites Only:

Reminder! Updating Prevention Plans, Problem Statements, Goals and Objectives

Problem Statements, Goals and Objectives cannot be deleted and the narrative cannot be edited even if data is not linked to them. A progress report must be completed in the Evaluation Module to cancel invalid Goals or Objectives and then the corresponding Problem Statements can be cancelled and new Problem Statements can be entered. Follow instructions for reporting progress on Goals or Objectives in the CalOMS Pv User Manual located in the Library under the Knowledge Base/Support area.

Those counties needing to update Problem Statements, Goals and Objectives must first revise the county's Strategic Prevention Plan (SPP) as the planning data that is input into CalOMS Pv must align with the SPP. An electronic copy of the amended SPP must be uploaded into CalOMS Pv and the new Problem Statements, Goals and Objectives must be keyed into the Planning Module in the appropriate areas.

Please wait until after July 8, 2015, to upload new or amended SPP's and input new Problem Statements, Goals, and Objectives as this must be done in the new FY 2015-16 version of CalOMS Pv.

Uploading New or Amended Prevention Plans: Log into the FY 2015-16 version of CalOMS Pv → Planning Module → Upload Strategic Plan → click on the "Add" button located on the left side of the screen → fill in the required fields → click on "Browse", locate and click on the document in your directory and then click "Open" → click on "Upload" → click on "Save" after the document uploads. Multiple documents can be uploaded in this area. The previous copy of the SPP can be kept or can be removed by clicking on "Delete" to the right of the SPP name.

Inputting New Problem Statements, Goals and Objectives: New Problem Statements, Goals and Objectives are input in the Planning Module. The instructions can be found in the User Manual located in the Knowledge Base/Support Module or by clicking on the "Manual" icon within the data entry screen.

Updating Problem Statements, Goals and Objectives: Problem Statements, Goals and Objectives cannot be deleted and the narrative cannot be edited. However, the "Start" and "Complete By" dates, measurement indicator/tools and responsible party can be updated.

- *Scenario #1 – County Needs to Cancel a Problem Statement:* Being that the Problem Statements, Goals and Objectives are linked together, the status changes have to begin with the linked Objectives, then the linked Goals, and lastly the linked Problem Statements. The status of Goals and Objectives are changed in the Evaluation Module. Once the status of all of the linked Goals and Objectives have been changed to either "Cancelled" or "Completed", the status of the linked Problem Statement can be changed in the Planning Module.
- *Scenario #2 – County Needs to Cancel a Goal:* Same premise as Scenario #1. Begin by canceling or completing the Objectives linked to the Goal and then the status of the Goal can be updated.

- *Scenario #3 – County Needs to Cancel an Objective:* Follow instructions for reporting progress in the previous section and change the status of the Objective to “Cancelled”.
- *Scenario #4 – County Wants to Temporarily Cancel a Goal or Objective:* Counties may want to temporarily cancel Goals or Objectives, but plan to reactivate them in the future. Cancel the Goals and/or Objectives by following the instructions for reporting progress. When the county is ready to reactivate the Goals and/or Objectives, return to the Evaluation Module → open the drop-down menu for “Select Goal/Objective Status” and select “Only Cancelled/Completed” → locate the Goal/Objective → click on the last progress report entry where the Goal/Objective was cancelled → change the status back to “Active” → input additional narrative explaining the basis for reactivating the Goal/Objective → click on “Save”.
- *Scenario #5 – County Wants to Extend the “Complete By Date” for a Goal or Objective:* Proceed to the Planning Module → choose either Goals or Objectives → click on the Goal or Objective that requires a date extension → change the date in the “Complete By Date” field → click on “Save”.

Reminder! Data Entry Rights, Tracking of Staff Hours, Tracking of Attendance and Notes for Recurring Services

Just a reminder that Counties can control data entry rights, the tracking of staff hours, the tracking of attendance for Recurring Services and requiring “Notes” for Recurring Services. This is done at the county level by a CalOMS Pv user with “Admin” privileges. Those counties wishing to activate these features should proceed to the Administration Module → County/Provider Permissions → check the appropriate boxes → click on the “Update” button in the upper left of the screen.

Name	Turn off data entry rights for Implementation Module	Require tracking of Staff Hours	Require tracking of Attendance	Require Notes in Recurring Services
06 - Colusa Department of Substance Abuse Services	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>