# CalOMS Entry For Previous Avatar Clients Tip Sheet

This Tip Sheet will walk users through how to enter CalOMS Updates or Discharges for clients who previously had their CalOMS Admission and/or CalOMS Updates entered in Avatar. The process outlined below will only be used for clients with existing CalOMS in Avatar, it will not need to be done for new CalOMS Admissions entered into SmartCare. If any additional help is needed, please contact us at bhs-ehrsupport@saccounty.gov.

1. Before going into the CalOMS screen, select your client and search "Client Programs (Client)".
2. Click on the "Enrolled" button for your program to open the details of that enrollment.
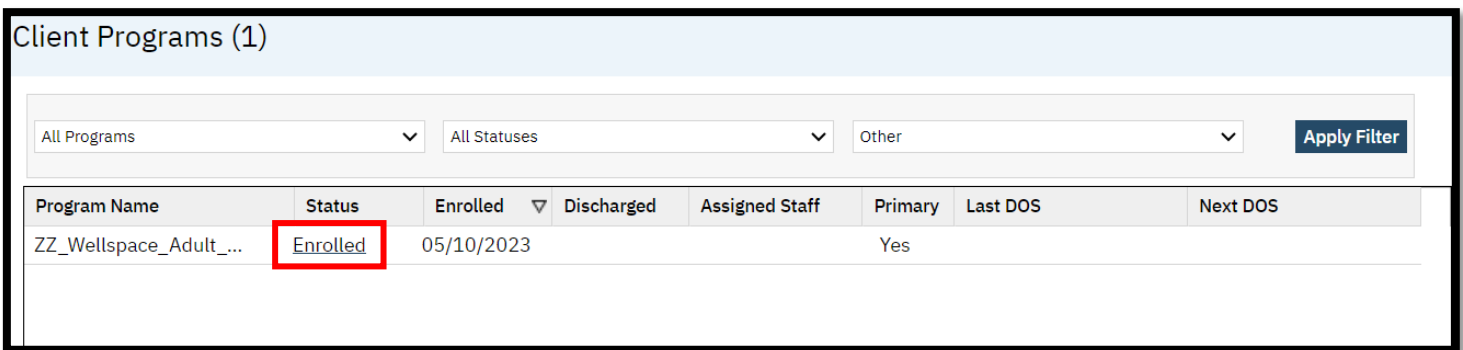
3. Add a comment stating you are updating CalOMS. Tab out (or click on another field) to enable the Save button. Click save, then close.
4. Log into Avatar NX and open the "Cal-OMS Admission" form for that client.
5. Copy or write down the "Form Serial Number". (We highly suggest you copy the number from Avatar to SmartCare as your CalOMS will error with DHCS if the number doesn't match
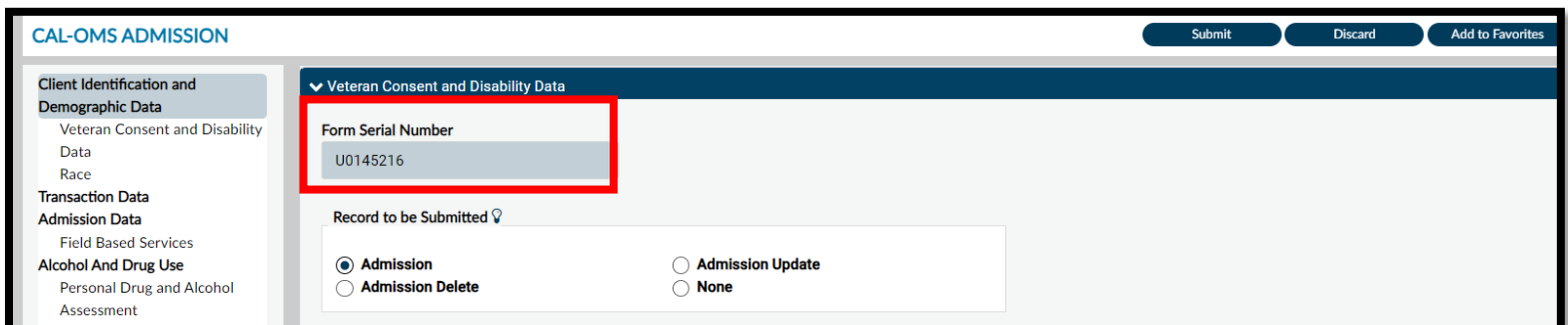
6. In SmartCare, select your client and search "TEDS Tracking List"
7. If the client is only open to one of your programs you will only see one option listed. If they have been seen at multiple sites at your program you may see multiple items

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listed. If there are multiple items listed you can hover over the "Episode Type" to view the appropriate program (residential, outpatient, detox, ect.). Click on the hyperlink under "Episode ID".

TEDS Tracking List (1)

All Episode Types		All Episode Status		All Service Type		Apply Filter
Episode Start Date 06/29/2022		Episode End Date 06/29/2023				

Episode ID △	Episode Type	Enrolled Date	Discharge Date	Last Document	Document Date	Service Type	Service Start	Service End
4	Nonresident...	06/05/2023				CalOMS	06/05/2023	

Nonresidential / Outpatient Treatment / Recovery

8. Make sure the item under TEDS Service List is selected and click the Modify button.

TEDS Episode Details

TEDS Episode Details

Episode Information

Episode ID:	4	Episode Type	Nonresidential / Outpatient Treatmer ▾
Enrolled Date	06/05/2023	Discharge Date	
Episode Number	E0100002	☐ Manual Override	

Last Document Date: 06/01/2020

TEDS Service Detail

Service Type	CalOMS ▾	End Reason	▾
Service Start	06/05/2023	Service End	

Modify   Clear

TEDS Service List   ☐ Display Only Open Service

	Service Type Id	Service Type	Begin Date	End Date	End Reason
✕ ●	4	CalOMS	6/5/2023 12:00:00 ...		

9. Above that, check the box for "Manual Override". Remove the contents in the "Episode Number" Field and paste or enter the contents that you copied from the "Form Serial Number" in Avatar. Click save and close.

TEDS Episode Details

TEDS Episode Details

Episode Information

Episode ID:	4
Enrolled Date	06/05/2023
Episode Number	U0145216 ☑ Manual Override

Episode Type: Nonresidential / Outpatient Treatmer ⌄

Discharge Date

Last Document Date: 06/01/2020

TEDS Service Detail

Service Type	CalOMS ⌄	End Reason	⌄
Service Start	06/05/2023	Service End	

Modify   **Clear**

TEDS Service List ☐ Display Only Open Service

	Service Type Id	Service Type	Begin Date	End Date	End Reason
✕ ⦿	4	CalOMS	6/5/2023 12:00:00 ...		

10. This only needs to be done for the client's first CalOMS update. If they have additional Update CalOMS or Discharge CalOMS this process will not need to be repeated. This process will only be done for clients who's Admission CalOMS was entered in Avatar. New clients will not need to go through this process. Client ID's will begin with an 8 for client's who are new to SmartCare.

Program Assignment Details   ☏⁺ ⚙ ⓘ ᴬᴮ 🗑 📄 💾 Save ✕

Program Assignment   **Additional Information**

General

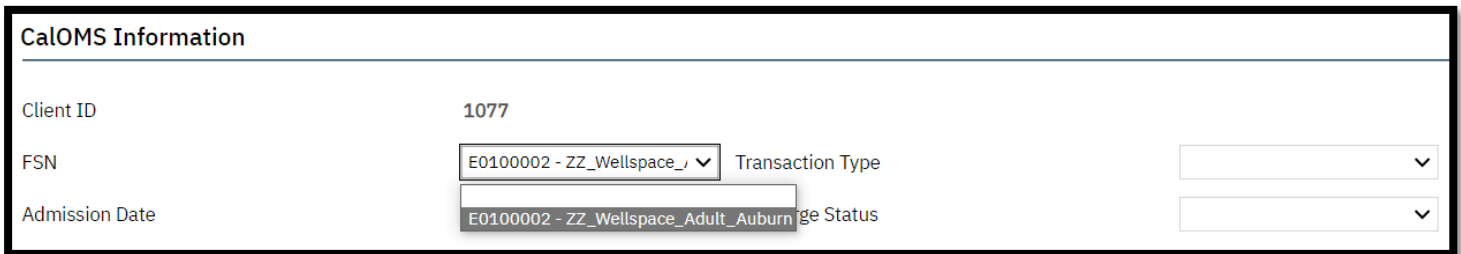|			
Program Name	ZZ_Wellspace_Adult_Williamsbourgh(433) ⌄ ☑ Primary	Current Status	Enrolled ⌄
Client...	Test, Monica		
Assigned Staff	⌄	Requested Date	
		Enrolled Date	05/10/2023
Comment	CalOMS Update	Discharged Date	
		Next Schedule Service	

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11. With your client still selected, open the "CalOMS Standalone Update/Discharge (Client)" screen.

12. Select your program from the program enrollment drop-down and choose "OK".

CDAG Program Enrollment ?

Select Program Enrollment

ZZ_Wellspace_Adult_Williamsbourgh(433)-05/10/2 ⌄

OK   Cancel
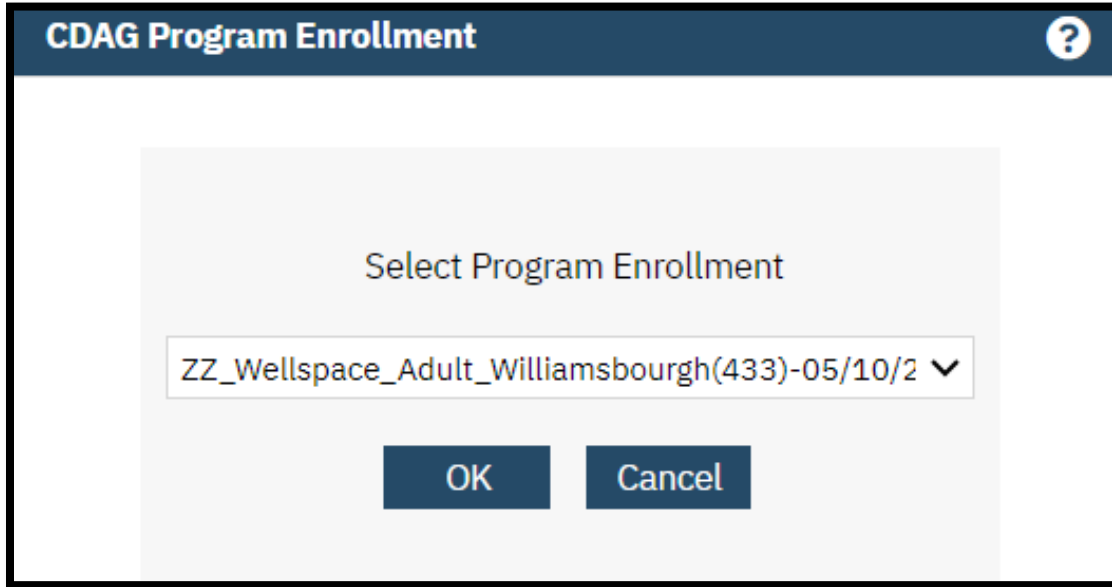
13. Your FSN will now show in the drop-down. If the drop-down is blank, make sure you saved the comment in the "Client Programs (Client)" screen.

CalOMS Information

Client ID   1077

FSN   E0100002 - ZZ_Wellspace_, ⌄   Transaction Type   ⌄

Admission Date   E0100002 - ZZ_Wellspace_Adult_Auburn ge Status   ⌄

14. Complete your CalOMS, save and sign to generate a PDF.