

I. ALL PROGRAMS

1. Client Profile Changes

- “Gender” field label has been changed to “Sex”. CalOMS values will remain as Male, Female and Other
- New field “Gender Identity” has been added as an optional field
- “Place of Birth” – a new feature has been added to default the State Place of Birth as California and make it read only when a California County Place of Birth is selected

The screenshot shows the 'Client Profile' form with various fields. The 'Sex' dropdown menu is highlighted in red. The 'Place of Birth' dropdown menu is also highlighted in red, showing 'San Diego' and 'California' as options. Other fields include Current First Name, Middle Name, Current Last Name, Birth First Name, Birth Last Name, Mother's First Name, State Client ID, Provider Client ID, SSN, Driver's License, Medicaid #, Date of Death, Consent on File for Future Contact, No Readmit Until, Record Created By, Last Updated By, Has Paper File, and Created Date.

2. Intake Screen Changes

- “Source of Referral” under Intake screen is now editable. It will populate from the Contract screen but can be changed if needed
- “Closure Reason” - three new additional options have been added
- New hyperlink named Enter Medi-Cal Payor Group Enrollment has been added to bring the user directly to the Payor Group Enrollment screen
- A warning message has been added upon clicking Save if the Payor Group Enrollment information has not been entered for a Medi-Cal client.

The screenshot shows the 'Intake Case Information' form. A warning message at the top states: "The contact benefit type is Medi-Cal, but the Medi-Cal Payor Group Enrollment has not been entered." The 'Source of Referral' dropdown menu is highlighted in red, showing "8-Post-release Community Supervision(AB 1...". The 'Closure Reason' dropdown menu is also highlighted in red, showing "Referred; did not have capacity", "Referred; did not meet ASAM level", and "Referred; did not meet diagnostic criteria". A new hyperlink "Enter Medi-Cal Payor Group Enrollment" is visible in the Actions section. Other fields include Intake Facility, Intake Staff, Manner of Contact, Residence, Case #, Case Status, Initial Contact Date, Intake Date, Pregnant, Chronic Life Threatening Illness (CLTI), Injection Drug User, Presenting Problem, Appointments, Risk Categories, and Date Closed.

3. Program Enrollment Changes

- “Perinatal” field will only appear for Certified Perinatal Facilities that are contracted with the County to provide perinatal services AND if the client is Female. If the facility is not Perinatal Certified and contracted with the County to provide perinatal services, this field will not be visible. The field will also not be visible for male clients regardless of the perinatal certification.

The screenshot shows the 'Program Enrollment Profile' form. Fields include Facility (Main Facility), Program Name (ODS OS), Program Staff (Staff, Random, LPC), Start Date (9/28/2020), End Date, PS Court Phase, and a newly added 'Perinatal' dropdown menu which is highlighted with a red box.

4. Encounter

- “Pregnant/Postpartum” field
 - a. This field is only visible for female clients
 - b. If YES is selected for the Perinatal field in the Program Enrollment, the “Pregnant/Postpartum” field will default as YES and will be read only. For any other female client who do not fit these criteria regardless of the perinatal certification, the “Pregnant/Postpartum” field will be blank as system required field
- A new field “Disallowed” has been added as an optional field and defaulted as No but can be changed when needed. When changed to YES, a new field “Disallowance Reason” will become visible as system required

The screenshot shows the 'Encounter' form. Fields include Note Type (DMC Billable), ENC ID, Program Name (Main Facility/ODS IOS - 7/6/2020 -), Service, Disallowance Reason (highlighted in red), Disallowed (Yes, highlighted in red), Start Date, End Date, Service Location, Start Time, End Time, Duration, Contact Type, Emergency, Visit Type, Pregnant/Postpartum, Was an interpreter used?, # of Service Units/Sessions (1), Medi-Cal Billable, and In what language was the service provided? (English).

II. RESIDENTIAL PROVIDERS ONLY

1. Residential Unit Dashboard and screens under Residential Unit Management

- The label “Inpatient” has been changed to “Residential”.
- NOTE:** There are some labels that did not get changed on this version but will be corrected in future versions

2. Bed Assignment History

- UCN is now one of the search parameters and a column for UCN was added under the Bed Assignment History List

The screenshot shows the 'Bed Assignment History Search' and 'Bed Assignment History List (Export)' interface. The search form includes Agency (Residential Agency 1), Facility (Residential #1), Inpatient Unit, Room #, Bed Assignment Date, Unique Client Number (highlighted in red), Level of Care Type, Program Enrollment Start Date, Client First Name, Client Last Name, and Bed #. The list table below has columns for Actions, Residential Unit, Room #, Bed #, Client Name, Unique Client Number (highlighted in red), Bed Assignment Date, and Program Enrollment.

III. OUTPATIENT AND OTP PROVIDERS ONLY

1. *Group Module* - the "Calculate ODS units" field will default to YES

- **IMPORTANT NOTE:** OTP Providers will need to change "Calculate ODS units" field to NO

Group Session Notes

Group Name: ID Test Session ID:

Group Type: ODS Group

Note Type: [Dropdown]

Start Date: [Calendar] End Date: [Calendar]

Billable: [Dropdown]

Start Time: 9:00 AM End Time: [Dropdown]

Calculate ODS units: Yes (highlighted in red)

Lead Staff: [Dropdown]

Duration: [Dropdown] Min

of Service Units/Sessions: [Dropdown]

Location: [Dropdown]

Service: [Dropdown]

IV. OTP PROVIDERS ONLY

1. *Encounters Methadone Dosing*

- An error message has been added to ensure that the encounter end date is the same month as the encounter start date for Methadone Dosing only
- An error message has been added to assist users on splitting the Methadone Dosing service encounter into 2 encounters when client turns 21 in the middle of service month

✖ The end date must be in the same month as the start date. ✖

✖ The client turned 21 on 1/27/2020. Change the end date to 1/26/2020 and enter a second encounter for 1/27/2020-2/4/2020 and change units accordingly. ✖

Encounter

Note Type: DMC Billable

ENC ID: [Text]

Program Name: OTP Facility/ODS OTP : 3/1/2019 -

Service: Methadone Dosing OTP

Billable: Yes

Disallowed: No

Start Date: 1/15/2020

End Date: 2/4/2020 (highlighted in red)

Service Location: Non-residential SUD TX Facility

Contact Type: Face To Face

Emergency: [Dropdown]

of Service Units/Sessions: 21