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CalOMS Agency Training

September 2, 2026

Agenda

- Welcome and Introductions
- CalOMS Overview
- CalOMS Error Report
- Unsigned CalOMS Forms Report
- DHCS Open Admissions
- Reporting Notes & Reminders
- Common Submission Errors
- Resources & Support



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CalOMS Overview

CalOMS Overview - Requirements

Outpatient and Detoxification Services

Require an admission and discharge between each level of care (LOC), regardless of the agency providing services.

- 1.0 Outpatient Services
- 2.1 Intensive Outpatient Services
- 3.2 Clinically Managed Residential Withdrawal Management

Residential Services

Require only one admission and one discharge per agency providing services even if they transition between levels of care within that agency as long as they do not have a gap in care that would require a discharge.

- 3.1 Clinically Managed Low-Intensity Residential Services
- 3.3 Clinically Managed Population-Specific High-Intensity Residential Services
- 3.5 Clinically Managed High-Intensity Residential Services

CalOMS Overview – Exclusions

The following services are EXCLUDED from CalOMS data collection:

- Education and Prevention
- Driving Under the Influence (DUI)
- Transitional Living or Sober Living Centers
- Recovery Services
- Care Coordination
- OTP Jail Dosing
- OTP Courtesy Dosing
- OTP STAR Recovery Services
- Buckelew Respite Services
- Recovery Coach Services
- **ONLY an ASAM or TCM services with no treatment services rendered

CalOMS Overview – Admissions

CalOMS Admissions

- DHCS requires a standard CalOMS admission for all persons 18 years or older who receive withdrawal management or treatment services.
- The CalOMS record for youth (persons 17 years of age and younger) is shorter and requires only specified fields to be completed.
- The CalOMS record for individuals in withdrawal management who are determined to not be stable enough to complete an entire standard CalOMS Admission may initially complete the minimum set of data. However, once stable enough to answer the full set of CalOMS questions, the CalOMS admission should be completed.
- CalMHSA: [How to Complete a CalOMS Admission](#)

NOTES:

- The CalOMS Admission form Effective Date (top ribbon of the form) should match the program enrollment Enrolled Date.

CalOMS Overview – Annual Updates

CalOMS Annual Updates

- DHCS requires a CalOMS annual update for participants in treatment for 12 months or more and are continuously in one agency and one service modality with no break in services.
- The agency must collect the CalOMS treatment data no later than 1 year, but not more than 60 days prior to the day the beneficiary was admitted to that specific agency and service modality.
- Clients who have not received services in more than 60 days should be discharged without an annual update.
- CalMHSA: How to Complete a CalOMS Discharge

NOTES:

- The CalOMS Standalone Update/Discharge form Effective Date (top ribbon of the form) must match the date that the information was collected and follow collection timeframes above.
- The first annual update submitted after admission will have an annual update number of 1, the second will have 2, etc.
 - The CalOMS Standalone Update/Discharge form Annual Update Number will be available when the Transaction Type of Annual Update is selected and must be the next consecutive number from the last Annual Update Number that was submitted to DHCS.

CalOMS Overview – Discharges

CalOMS Discharges

- DHCS requires a CalOMS discharge for every client with a CalOMS admission.
- Providers may complete a standard discharge if the client experiences a life circumstance that prevents them from completing the discharge interview, and the provider has the required information to accurately complete the discharge without guessing the responses.
- Administrative discharges should only be reported in the event the client cannot be located to answer the CalOMS questions, they have passed or have become incarcerated.
 - Outpatient treatment programs, including withdrawal management and OTP services, should be administratively discharged when the client has not had a service within 30 but no more than 60 consecutive days.
 - Residential treatment programs should be administratively discharged when the client has been absent from the program without approved leave for 7 consecutive days.
 - If leave has been granted and the client does not return by the expected date, begin counting from the day they were due back to the program.
- CalMHSA: [How to Complete a CalOMS Discharge](#)

CalOMS Overview – Discharges Cont.

NOTES:

- The CalOMS Standalone Update/Discharge form Effective Date (top ribbon of the form) must match the program enrollment Discharge Date and must cover all services rendered during that program enrollment.
- The Discharge Date must be after the date of the admission, (NOT the same day), and is generally the date of the last service, the date of the exit interview or the date of the last oral medication.
- The Administrative Discharge Date should be the date the treatment provider last saw the client.

CalOMS Overview – OTP & Residential “Bubble”

OTP & Residential “Bubble”

- OTP and residential programs do not require a new CalOMS admission or discharge with a change in insurance payer or level of care.
- To ensure the correct TEDS/FSN is linked to the CalOMS form, the *original* program enrollment must be linked to any annual update or discharge forms
 - When choosing the CDAG, always choose the first program in the “bubble”
- The CalOMS Error Report will start a new bubble if these conditions are met:
 - OTP: There is a gap in services of more than 60 consecutive days
 - Residential: There is a gap in services without approved leave for 7 consecutive days

Questions?



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CalOMS Error Report

CalOMS Error Report

- **Resolve all errors by the 10th of every month**
- Includes only the forms that are missing or have an error
- The report is in real time; corrected errors should no longer appear when the report is run again
- Multiple errors are separated by a semicolon (;)
- Includes specific error reasons for ease of troubleshooting
- Error labels and descriptions are listed in the procedure

- **Please do not make any changes to forms after the 10th of the month unless it is listed on the Error Report or as directed by your contract manager**

CalOMS Error Report Cont.

Generate the CalOMS Error Report from SmartCare:

- Search: **Marin – CalOMS Error Report (My Office)**
- Programs: **Select Each Program**
- **View Report**
- Export Drop Down Menu: **Excel**
- **Open the Marin - CalOMS Error Report**

Report View - Google Chrome

marin.smartcarenet.com/MarinSmartcareProd/ShowReport.aspx?ReportId=UekL9P5QjY8%3D&ReportServerId=RUNPkrIID3Q%3D&StaffId=undefined&ReportServerPath=I9bceT3E8TwbTc%2FkJLAgoK3xV4wTUZ%2B76DaPu8i%2FHRGuVvglySUi2i5cWsxuzSo%2FFCBMCIc%3D&InsurerId=0&histor...

☆ ☆ Fax

Programs R2R 1.0 View Report

1 of 2 ? Find Next

Executed by: kmartin	CDAG: Substance Use Disorders	CalOMS Error Report		Run Date:	6/12/2025 1:54:19 PM								
Client ID	Status	Program	Program Enrollment	Cal OMS Admission Date	Admission Error	Admit FSN	Program Discharge Date	Cal OMS Discharge Date	Discharge Error	Discharge FSN	Last DOS	Latest Annual Update Date	Annual Up

CalOMS Error Report Cont.

Last Date of Service

- CalOMS reporting requires agencies to use the last face-to-face or phone conversation as the discharge date with few exceptions (last oral medication, date of exit interview)
 - Error report assumes that the program enrollment discharge date is correct
- **Program enrollment discharge is present, but the CalOMS discharge is missing:**
 - Error report uses the program enrollment discharge date as the CalOMS discharge due date
- **CalOMS discharge is present, but the Program enrollment discharge is missing:**
 - Error report uses the CalOMS discharge date as the program enrollment discharge due date
- **Program enrollment discharge and CalOMS discharge are missing:**
 - Error report reflects the last DOS as the program enrollment and CalOMS discharge due date

CalOMS Error Report Cont.

Last Date of Service, Methadone Services

- Methadone day services are entered as a single outpatient service with multiple units
- **Program enrollment discharge is present, but the CalOMS discharge is missing:**
 - Error report uses the program enrollment discharge date as the CalOMS discharge due date
- **CalOMS discharge is present, but the Program enrollment discharge is missing:**
 - Error report uses the CalOMS discharge date as the program enrollment discharge due date
- **Program enrollment discharge and CalOMS discharge are missing:**
 - Error report reflects the last DOS plus the number of units entered as the program enrollment and CalOMS discharge due date

CalOMS Error Report Cont.

Error Messages

- CalOMS Admission Date Invalid
- CalOMS Admission Required on YYYY-MM-DD
- CalOMS Discharge Date Invalid
- CalOMS Discharge Must Be AFTER Last DOS
- CalOMS Discharge Required on YYYY-MM-DD
- No Annual Update On File
- Annual Update # Overdue
- Warning: Annual Update # Needed in x Days
- Program Discharge Required on YYYY-MM-DD
- FSN Mismatch – Admission, Discharge, Annual, or TEDS Do Not Match
- Missing TEDS or PE < > TEDS
- Status: “SmartCare Validation Error”

CalOMS Error Report Cont.

Update a Program Enrollment & FSN

Errors populate on the CalOMS Error Report when there is a mismatched FSN/TEDS

- Open the CalOMS form
- **Edit**
 - A new version of this document is about to be created. Do you wish to continue? **OK**
- **More Detail (+)**
- Program Drop Down: **Select the correct program enrollment**
- **Refresh CalOMS Admission**
 - Confirm the correct Admission date and FSN are populated
- **Sign**
 - Update the Author as needed

CalOMS Error Report Cont.

Link a Program Enrollment & FSN

Edit

CalOMS Admission

Effective Status Signed

Document

Confirmation Message

A new version of this document is about to be created. Do you wish to continue?

OK Cancel

Sign

Save

PdfBytesHandler.axd 1 / 3 100%

More Detail

CalOMS Admission

Effective Status Signed Author

Document

PdfBytesHandler.axd 1 / 3 100%

Update Program Enrollment & FSN

CalOMS Admission

Effective Status In Progress Author

Sign

Other Versions

Signed By

Signer

Program

Select Program

Admission SUD, Medical & Mental Health

CalOMS Admission Training Tips: How to Complete CalOMS

Refresh CalOMS Admission

Questions?



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Unsigned CalOMS Forms Report

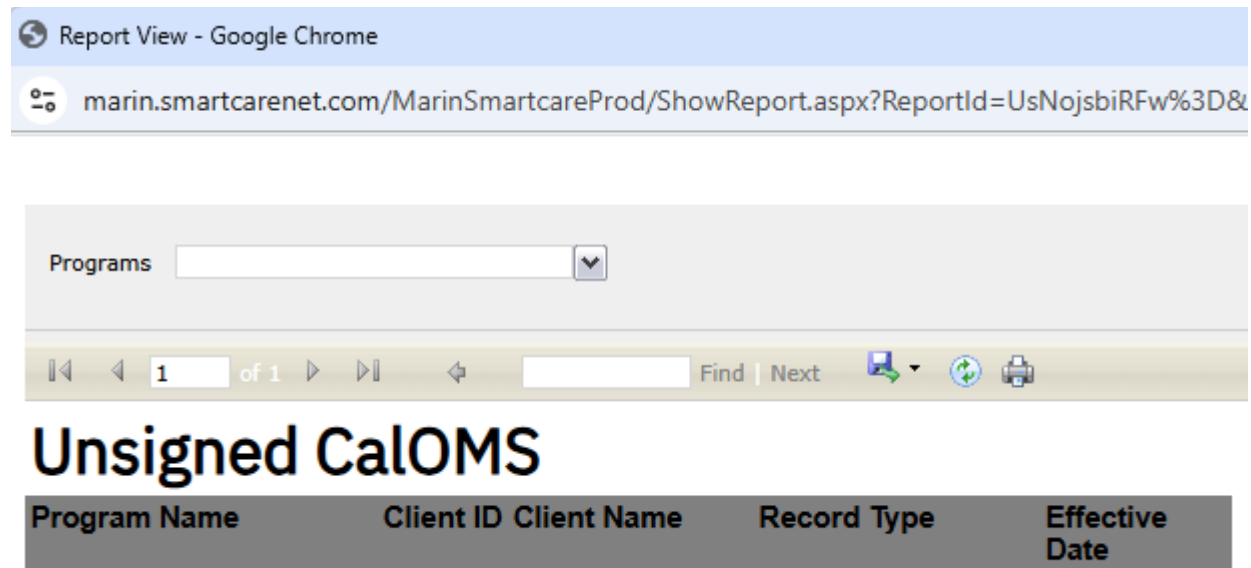
Unsigned CalOMS Forms Report

- **Sign all forms by the 10th of every month**
- Includes only the forms that are unsigned
- The report is in real time; signed forms should no longer appear when the report is run again
- Review the CalOMS forms before and after the unsigned form to ensure you don't create a duplicate form
 - If the unsigned form is a duplicate, contact your contract manager to delete the form

Unsigned CalOMS Forms Report Cont.

Generate the Unsigned CalOMS Forms Report from SmartCare:

- Search: **Marin – Unsigned CalOMS Forms Report (My Office)**
- Programs: **Select Each Program**
- **View Report**
- Export Drop Down Menu: **Excel**
- **Open the Marin – Unsigned CalOMS Forms Report**



The screenshot shows a web browser window titled "Report View - Google Chrome" with the URL `marin.smartcarenet.com/MarinSmartcareProd/ShowReport.aspx?ReportId=UsNojsbiRFw%3D&`. Below the browser window is a form with a "Programs" dropdown menu. Below the form is a navigation bar with "1 of 1" and "Find | Next" buttons. Below the navigation bar is the title "Unsigned CalOMS" and a table header with the following columns: "Program Name", "Client ID", "Client Name", "Record Type", and "Effective Date".

Program Name	Client ID	Client Name	Record Type	Effective Date
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Questions?



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DHCS Open Admissions Report

DHCS Open Admissions Report

- SUD Team will submit CalOMS files monthly and generate the DHCS Open Admissions Report
- If the Marin –CalOMS Error Report is resolved before the monthly DHCS upload, agencies should not receive a monthly Open Admission Report.
- If there are any Open Admissions, the Marin SUD team will email the DHCS CalOMS Open Admission Report to agency contacts for error correction and response
 - Response and resolutions are due back to the county within one business day

Questions?



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Reporting Notes & Reminders

Reporting Notes & Reminders

- **No overlapping program enrollment dates**
 - Only one program enrollment for the same agency/facility can be open at the same time
 - **Program enrollments MUST have an effective date**
- **No discharge to one LOC on the same day as an admission to another LOC**
 - Update program enrollments to resolve errors
- **Program enrollments entered in error with NO services rendered:**
 - Update program enrollment to Requested Status with a Requested Date that does not overlap other program enrollments

Reporting Notes & Reminders Cont.

Backdated CalOMS Forms:

- When there are multiple program enrollments or the correct program enrollment is discharged:
 - Temporarily close the active program enrollment by changing the Current Status dropdown to Discharged and add a Discharged Date of today and Save
 - Re-enroll the program enrollment that the CalOMS form(s) should be linked to changing the Current Status dropdown to Enrolled and Save
 - Add the CalOMS forms (Admission or Standalone Update/Discharge)
 - Close the program enrollment that the CalOMS form(s) should be linked to by changing the Current Status dropdown to Discharged and add the original Discharged Date (should also match the last DOS) and Save
 - Re-enroll the current program enrollment by changing the Current Status dropdown to Enrolled and Save
 - **Note: The correct program enrollment must be Enrolled/active for the FSN to link correctly to the CalOMS form**

Reporting Notes & Reminders Cont.

- **Everyone can edit a form created by a different user:**
 - Navigate to the CalOMS form to be edited, click the edit button, select your name from the Author dropdown, make required changes, click the Sign button
- **Sequestered Accounts:** Email BHRS EHR Support and copy your contract manager
 - Provide the client number, program name, names of all agency staff who will need access to the client's records, and the name of your contract manager

Questions?



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Common Submission Errors

Common Submission Errors

- SmartCare has validations built in for most issues that will prevent you from signing the form
 - You will receive a pop-up that indicates the field that needs a correction

Common Submission Errors

Out Of County Referral Number (OOCR)

- OOCRs are used to identify the county that is paying for the client's treatment services when the paying county is not the county in which the provider's facility is located.
- The OOCR varies by agency

Common Submission Errors

Out Of County Referral Number (OOCR) Cont.

If your agency is physically located within Marin County:

Do not require an OOCR

SmartCare CalOMS Admission Form Question:

If the client's treatment services are being delivered on behalf of another county, what is the code of the county for which the services are being performed?:

Answer: None or not applicable

Common Submission Errors

Out Of County Referral Number (OOCR) Cont.

CalOMS Admission

Effective06/05/2025

StatusNew

AuthorMartin, Keely

Admission

SUD, Medical & Mental Health

CalOMS Admission

Training Tips: How to Complete CalOMS

Refresh CalOMS Admission

Client ID

Admission Transaction Type

Initial Admission

FSN

How many days was the client on a waiting list before being admitted to this treatment program?

0

Allowed values: 0-999, 99901, 99904

What is the number of prior episodes in any alcohol or drug Treatment program in which the client has participated?

0

Allowed values: 0-999, 99900, 99901, 99904

If the client's treatment services are being delivered on behalf of another county, what is the code of the county for which the services are being performed?

None or not applicable

Common Submission Errors

Out Of County Referral Number (OOCR) Cont.

If your agency is physically located outside of Marin County:

A unique OOCR is required and must match the DHCS Master Provider File

SmartCare CalOMS Admission Form Questions:

If the client's treatment services are being delivered on behalf of another county, what is the code of the county for which the services are being performed?:

Answer: Marin

What is the special services contract ID number under which the client's services were provided?:

Specific to facility

Answer: Unique 4-digit Referral Number

Common Submission Errors

Out Of County Referral Number (OOCR) Cont.

CalOMS Admission

Effective 06/05/2025 Status New Author Martin, Keely

Admission SUD, Medical & Mental Health

CalOMS Admission Training Tips: How to Complete CalOMS Refresh CalOMS Admission

Client ID [REDACTED]

Admission Transaction Type Initial Admission FSN

How many days was the client on a waiting list before being admitted to this treatment program?
Allowed values: 0-999, 99901, 99904 0

What is the number of prior episodes in any alcohol or drug Treatment program in which the client has participated?
Allowed values: 0-999, 99900, 99901, 99904 0

If the client's treatment services are being delivered on behalf of another county, what is the code of the county for which the services are being performed? Marin

What is the special services contract ID number under which the client's services were provided?
Allowed values: 0000-9999, 99902 0021

Common Submission Errors

Out Of County Referral Number (OOCR) Cont.

Out of County Referral Numbers (OOCR):

Bi-Bett, Diablo Valley Ranch: 0016

Bi-Bett, Pueblos Del Sol: 2304

Bi-Bett, East County Women's Recovery Center/Wollam: 2302

HealthRIGHT 360 (815 Buena Vista W): 2398

HealthRIGHT 360 (890 Hayes): 0090

Recover Medical Group P.C.: 2301

Women's Recovery Services, A Unique Place: 0004

Common Submission Errors

Form Effective Date

- Admission: The effective date should match the program enrollment date
- Annual Update: The effective date must match the date that the form information is collected from the client
- Discharge: The effective date must match the date that the form information is collected from the client, the last date of service or the date of the last oral medication
 - Must cover all services during the program enrollment
 - Can't be the same date as the admission

Common Submission Errors

Form Effective Date Cont.

CalOMS Admission

Effective 06/05/2025

Status New

Author Martin, Keely

Admission SUD, Medical & Mental Health

CalOMS Admission Training Tips: How to Complete CalOMS

Refresh CalOMS Admission

CalOMS Standalone Update/Discharge

Effective 06/11/2025

Status New

Author Martin, Keely

CalOMS Information SUD, Medical & Mental Health

CalOMS Information

Refresh CalOMS Information

Common Submission Errors

Medication Prescribed As Part Of Treatment

- Only OTP programs can prescribe medication as part of treatment

SmartCare CalOMS Admission Form Question:

What medication is prescribed as part of treatment?:

Answer: None

Common Submission Errors

Medication Prescribed As Part Of Treatment Cont.

CalOMS Admission

Effective 06/05/2025  Status New Author Martin, Keely

Admission SUD, Medical & Mental Health

Medical/Physical Health Information

Is the client a Medi-Cal Beneficiary?	Yes 	If the client is not male, is the client pregnant at time of admission?	No 
What medication is prescribed as part of treatment?	None 	Has the client been diagnosis with Tuberculosis?	No 

Common Submission Errors

Mental Health Information

- Responses for Mental Health Information questions must be 0-30
 - 99904 (Client unable to answer) is only allowed for detox clients or developmentally disabled clients

Common Submission Errors

Mental Health Information Cont.

CalOMS Admission

Effective 06/05/2025  Status New Author Martin, Keely

Admission SUD, Medical & Mental Health

Mental Health Information

Has the client ever been diagnosed with a mental illness? No 

In the past 30 days, Has the client taken prescribed medication for mental health needs? No 

How many time in the past 30 days had the client received outpatient emergency services for mental health needs?
Allowed values: 0-30, 99904 0

How many days in the past 30 has the client stayed for more than 24 hours in a hospital or psychiatric facility for mental health needs?
Allowed values: 0-30, 99904 0

Common Submission Errors

FOTP, PSN & CDCR

- **Female Offender Treatment Program (FOTP)**
 - If the client is not enrolled in the FOTP use 99902 in the CDCR field:
 - 99902 – None or not applicable
- **California Department of Corrections and Rehabilitation (CDCR) Number**
 - You MUST enter a valid six-character alpha and numeric CDCR number if the answer to FOTP is yes

Common Submission Errors

FOTP, PSN & CDCR Cont.

- **Parolee in the Parolee Services Network (PSN)**
 - If the client is not enrolled in the PSN use 99902 in the CDCR field:
 - 99902 – None or not applicable
- **California Department of Corrections and Rehabilitation (CDCR) Number**
 - You MUST enter a valid six-character alpha and numeric CDCR number if the answer to PSN is yes

Common Submission Errors FOTP, PSN & CDCR Cont.

Admission

SUD, Medical & Mental Health

Legal Information

What is the client's criminal justice status?

No criminal justice involvement ▼

How many times has the client been arrested in the past 30 days?
Allowed values: 0-30, 99904

0

How many days has the client been in prison in the past 30 days?
Allowed values: 0-30, 99904

0

Is the client a parolee in the Female Offender Treatment Program (FOTP)?

No ▼

What is the client's CDCR Identification Number?
Allowed values: 6 digit string, 99900, 99901, 99902, 99904

99902

How many days has the client been in jail in the past 30 days?
Allowed values: 0-30, 99904

0

Is the client a parolee in the Parolee Services Network (PSN)?

No ▼

What is the client's FOTP Priority Status?

None or not applicable ▼

Common Submission Errors

Withdrawal Management Discharge

- Withdrawal Management Discharges require a Service Type 5 (Non-hospital detoxification services) and Discharge Code 3 (Left Before Completion)
- **Transaction Type:** Discharge – Detox
- **Discharge Status:**
 - Left Before Completion with Satisfactory Progress / Standard (all questions)
 - Left Before Completion with Unsatisfactory Progress / Standard (all questions)

Common Submission Errors

Withdrawal Management Discharge Cont.

CalOMS Standalone Update/Discharge

Effective 06/11/2025  Status New Author Martin, Keely

CalOMS Information SUD, Medical & Mental Health

CalOMS Information [Refresh CalOMS Information](#)

Client ID 

FSN  Transaction Type Discharge - Detox 

Admission Date  Discharge Status Left Before Completion w / U 

Questions?



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Resources & Support

Resources

CalMHSA

- [CA CalOMS Admission Document User Guide](#)
- [CA CalOMS Standalone Update Discharge Document User Guide](#)
- [CalOMS Data Collection Guide](#)

DHCS

- [BHIN 24-030](#): Update to Demographic Reporting Requirements
- [BHIN 24-001](#): DMC-ODS Requirements 2022-2026
- [BHIN 23-068](#): Updates to Documentation Requirements
- [BHIN 25-001](#): Updates to Collecting and Reporting Discharge Data
- [DHCS CalOMS Resources](#)

Resources Cont.

County

- BHRS-68: CalOMS Treatment Data Collection

Support

Contract Manager Support:

- CalOMS Forms (Admission, Annual Updates, Discharges)
- Error Report:
 - Troubleshooting errors and resolution
- Unsigned CalOMS Forms Report:
 - Troubleshooting errors and resolution
- Other abnormalities or questions

Escalated Support:

- SUD CalOMS SMEs will work with contract managers, the EHR team and CalMHSA as needed to resolve issues

Additional Questions?



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Thank You