Table of Contents

Introduction by State Long Term Care Ombudsman .......................... 4

I. Some Things to Know Before Entering Data .............................. 5-7
   A. ODIN’S Screens
      1. Major Screens – Summary & Accordion
      2. Viewing Screens & Zoom
   B. Some ODIN Features
   C. Icons Used in this Guide
   D. ODIN will Time Out
   E. ODIN and Names
   F. Delete vs Cancel
   G. Complaint & Disposition Codes
   H. Downloading and Uploading (Attaching) Documents

II. Information About Cases & Activities Sections of ODIN ............ 7-9
    A. Cases
       1. Case Intake Document
       2. Validating & Closing a Case Record
    B. Activities
       1. Best Practices
       2. Activity Types
       3. Activity Topics

III. Accessing ODIN ........................................................................ 10-12
     A. Logging into ODIN
     B. Logging Out of ODIN
     C. Forgot Your Password

IV. ODIN Screens ........................................................................... 13-14
    A. Cases Screens
    B. Activities Screens

V. Quick Steps
   A. CASES
      1. Documenting a Case Record ............................................. 15-16
      2. Adding Attachments to a Case Record ............................... 17-18
      3. Closing a Case in ODIN .................................................. 19-20
      4. Validating and Closing a Case Record .............................. 21-23
B. ACTIVITIES
1. Creating an Activity Record for Type 4 – Consultation to Facilities .......... 24-26
2. Creating an Activity Record for Type 5 – Information & Consultation to Individuals ................................................................................................................................. 27-29
3. Creating an Activity Record for Type 6 – Facility Coverage ..................... 30-31
4. Creating an Activity Record for Type 7 – Participation in Facility Surveys 32-33
5. Creating an Activity Record for Type 99 – Other Volunteer Time ............. 34-35
6. Adding Attachments to the Activity Record ........................................... 36-37
7. Editing or Updating a Validated & Closed Activity Record .......................... 37

C. CUSTOMIZING SUMMARY SCREENS
1. Customizing the Summary Screen – Reordering the Columns .............. 38
2. Customizing the Summary Screen – Removing Columns ...................... 39
3. Customizing the Summary Screen – Adding Columns .......................... 39
Introduction by State Long-Term Care Ombudsman

Dear Local Ombudsman,

I am pleased to present to you this Reference Guide for the Ombudsman Data Integration Network (ODIN), California’s Long-Term Care Ombudsman data collection system. ODIN is an innovative and creative solution that provides local Ombudsman programs a user-friendly system to record your advocacy work on behalf of residents of long-term care facilities.

ODIN will allow local Ombudsman program coordinators to determine user access and rights for all certified Ombudsman representatives. ODIN is a case management tool to record and track all Ombudsman cases and other Ombudsman activities.

This system will be able to provide the State Office with the data needed to comply with provisions of the National Ombudsman Reporting System and California’s Annual Report to the Administration on Aging.

I encourage you to use this Reference Guide to help familiarize you with ODIN’s features. You will find that the system’s intuitive interface will easily allow you to record casework and other activities. The Reference Guide will be able to address your questions about data entry in ODIN. Should you have any questions about ODIN, please contact us at StateOmb@aging.ca.gov.

Sincerely,

Joseph Rodrigues
State Long-Term Care Ombudsman

NOTE:

This guide contains the quick steps for the various procedures to create records and navigate in ODIN. This guide is an abbreviated version of the ODIN Reference Guide, which also contains the QuickSteps chapter, detailed instructions and explanations on entering information into ODIN, and reference materials. You are able to access the ODIN Reference Guide from the LTCOP Coordinator Resources page:

https://www.aging.ca.gov/ProgramsProviders/LTCOP/Coordinator_Resources/
I. Some Things to Know Before Entering Data

A. ODIN Screens
   1. Major Screens – Summary and Accordion screens.
   2. Viewing Screens & Zoom
      a. You may need to reduce the zoom of the screens in ODIN for the entire screen to display on your monitor.

B. Some ODIN Features
   1. When you click on the VIEW button in a category, ODIN will display a drop-down selection for the corresponding field category.
   2. Type-ahead: You can click in a field with a drop-down button and begin to type an entry (i.e. Complaint Code, Verification, Facility Name, County, Person Name, etc.). If the entry exists in the Program database, ODIN will predict the entry and display a drop-down selection with the predicted entry at the beginning of the list. User can select correct entry from the drop-down selection, if appropriate.
   3. Date fields: When you click in a DATE or Date of Birth (DOB) field, you can type in the date in the [MM/DD/YYYY] format or the current month's calendar will appear and you can select the appropriate date by clicking on the calendar day. You are able to select different months by clicking on the left or right arrow on either side of the [Month, Year] heading in the calendar.

C. Icons Used in this Guide
   1. Notes provide additional information about a specific function or process of the ODIN application.
   2. VALIDATE: Validations highlight areas where required information has to be entered.

D. ODIN will Time-Out
   1. ODIN will time out a user after 20 minutes without activity. Activity = changing screens or selecting options. It does not include typing in a text box.
   2. Timing out becomes a real issue if you have a lot of investigation notes you want to enter onto the record. To be safe, you should save your entered notes by clicking on the "disk icon" shown in blue at the top of the Notes section on the Journal Entry screen.

   **NOTE:** Rather than typing in a lot of notes, you can type your notes in a Word document and then upload it into ODIN. If you use this approach, put a few
summary statements in the Journal Entry Notes section and reference the uploaded document.

E. ODIN and Names
1. Names format: Last name, First name

2. Names already in ODIN:
   - The names of some individuals – residents, facility staff personnel, prior complainants – are already in ODIN. These are persons who were listed in the previous system (NORS).
   - These individuals may be in ODIN multiple times due to the way NORS captured and stored data, which is different from the way ODIN stores data.

3. New Names added to ODIN
   - If you enter the name of a person – Complainant, Resident, etc. – that is not already in ODIN, be prepared to create a record for that person. To do so you will need basic demographic information – name, age, sex, birth date, ethnicity, etc., and name, address (including facility name) and phone number. HOWEVER, it is possible to create a record for the resident/staff person with only their name and sex if that’s all of the information you have.

F. DELETE button vs CANCEL button. BE CAREFUL.
1. DELETE = Data is erased. If you click on the DELETE button, you will either the erase the entire record from the database, depending on the screen involved, or you will erase a subset of the record.

2. CANCEL = Entered data is NOT saved. If you have made an error, or if you want to leave a screen without having the data retained in the database, click on the CANCEL button. Also, if you have viewed a screen without entering any data, if you click the CANCEL button, ODIN will take you back to the Cases Summary Screen.

G. Complaint and Disposition codes
1. In ODIN, the Complaint code is shown in two fields – Major Complaint & Minor Complaint.
   - Major Complaint code is the complaint category (A-P) portion of the NORS codes.
   - Minor Complaint code is the code for the specific action of the complaint (#s 1-132).

   NOTE: A copy of the Complaint and Disposition Codes may be found in the Appendix to this Guide.
H. Downloading and Uploading (Attaching) Documents

1. Downloads:
   a. To download documents, you will need to have your popup blocker disabled. Make sure your system will “always allow pop-ups from this site (www.aging.ca.gov)”. To download a document, click on the “Download” button in the “Attachments” area of the screen.

2. Uploads/Attachments:
   a. Documents are uploaded into ODIN as attachments, which can only be done on the Journal Entry screens.
   b. At present, you can only upload (or attach) a maximum of 5 pages at a time. If there is a comma in the filename field, you may encounter a problem when trying to upload a document.
   c. Uploaded (attached) documents should be referenced in the appropriate Notes section of the screen.

II. Cases and Activities Information

A. Cases
   1. Case Intake Document
      a) Case Overview Report
         1) Each case in ODIN has a Report Icon which looks like a bar chart, and is located to the left of the case number.
         2) To view the report, click on the report icon next to the desired case number, and the Case Overview Report, including all journal entries, will open.
         3) To print this 2 page report, click on the print icon on the bottom of the report.

      b) New Case/Activity Report Form
         1) This is a 1 page form that can be used as the intake document and as the form for recording notes during the investigation phase.
         2) The necessary information for the intake portion of the document is taken from the Cases Summary Screen – case number, resident’s name, facility, complainant’s name; and from the Intake Journal Entry Screen – Intake summary found in the Notes section. The Intake Summary can be cut and pasted onto the New Case/Activity Report form in the “Complaint” section.

      c) SOC-341
         1) Some Ombudsmen print the SOC-341 for the case and use that at their intake document.
         2) The information on this form is very confidential, so extreme caution should be exercised when using this completed form as the intake document.
2. Validating & Closing a Case Record
   a) ODIN checks to determine if all required information has been entered. If some of the required information is missing, ODIN will display error messages. Error message(s), if any, will display in red in the area under the Perpetrator tab on the Cases Accordion Screen and will identify the missing information.

   b) A minimum of 3 journal types are required – Intake, Action & Closed – in order to validate and close a case.

   c) Validated & Closed Cases
      1) After you have successfully validated and closed a case record, ODIN populates the Cases Summary Screen with the close date and a checkmark in the Validation column. The “View” button on the Cases Summary Screen, located to the left of the case number, is changed to “Review”. You will no longer have access to this record.
      2) Once the LTCOP Coordinator has reviewed the case record, ODIN removes it from the Cases Summary Screen. Contact the Coordinator to gain access to a closed case record.

B. ACTIVITIES

1. Best Practices
   a) Complete the Location tab for all activity records even when it is not required.

   ❖ NOTE: This makes it easier to identify the record you want when you don’t have the activity record # for the specific record being sought.

   b) When entering data on an Activities Accordion Screen tab that is NOT required by the activity type, be sure to write a summary statement or 2 in the Activity Accordion Screen’s Notes field, referring to the non-required tab where data has been added.

   c) Enter all available information for reference.

   d) When creating an activity record after witnessing an AHCD, enter the resident’s name and the fact that the activity was the result of an AHCD request in the Notes field on the Activity Accordion Screen; enter the health agent’s name in the Topics Comments section of the Topics dialog box.

2. Activity Types
   a) There are 13 activity types, numbered 1 – 12 & 99.

   b) You will use 5 types most often. They are:
      1) Type 4 – Consultation to Facilities;
      2) Type 5 – Information & Consultation to Individuals;
      3) Type 6 – Facility Coverage
      4) Type 7 – Participate in Facility Surveys
      5) Type 99 – Other Activities
c) The Annotated NORS Activity Chart lists and defines the activity types. (See Appendix.)

d) Required Components
   1) The minimum components required for each activity type are identified on the Accordion Screen tabs. The tabs will display "*Required" to the right of the tab name.

   ☀ NOTE: Although not required, I recommend including the name of the facility for all activity types.

3. Activity Topics
   a) The Primary Topic is the topic you spent the most time discussing, OR the most important issue discussed and/or handled.

   b) Previously used sub-topics cannot be used for subsequent issues.

   c) Multiple sub-topics can be entered for multiple issues. For example,

   You make an unscheduled visit to Mountain View nursing home, and upon entering you ask for a list of residents so that you can see who is new to the home. You make rounds introducing yourself to new residents and checking in with residents that you know. One resident asks you about the Money Follows the Person program, and facility staff approaches you with questions about a potential resident discharge.

   • What activity topics best fit this situation?

   This one activity record should have 3 topics:
   • "6 – Facility Coverage", the primary topic
   • "5 – Information to an Individual" and
   • "4 – Consultation to facilities".
   • Primary Topic – AT #6 - Facility Coverage: Sentences describing the unscheduled visit to the facility.
   • AT #5 – Info to an Individual: Resident asking about "Money Follows the Person" program.
   • AT #4 – Consul to Facilities: Staff asks about potential discharge of a resident.
III. Accessing ODIN

A. Logging into Odin

ODIN is a web-based application. To log into ODIN:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Launch the Google Chrome, Firefox, Kindle or Safari browsers and type in the following URL – <a href="https://www.aging.ca.gov/ODIN/">https://www.aging.ca.gov/ODIN/</a></td>
</tr>
</tbody>
</table>

**NOTE:** Internet Explorer does not work with this application.

The following web page will appear:

![Login Screen]

2. Type your username/ID and password in the LOGIN screen. (The first time you login, you will enter the temporary password you will have been given. You will need to change the temporary password during your first login session.) (If you forget your password, you will need to contact the LTCOP Coordinator to get another temporary password.) If you do not have a username and password, contact the Coordinator of the local Long-Term Care Ombudsman Program to request one.

When you log in, ODIN will open to the Case summary screen for your designated program:

![Case Summary Screen]
After the first time you log in with your username, ODIN will automatically display your username and program information the next time you log in from the same computer. If you occasionally clear temporary internet files, cookies, and cache, you will need to reenter your username after you clear the files.

Enable the Pop-up Blocker
To do so, click on the 3 lines in the upper right corner of the log-in screen and select the tag "always allow pop-ups from this site", "(aging.ca.gov)".

B. Logging Out of ODIN

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click on either the SAVE or CANCEL button located at the bottom of a screen to return to the Summary Screen.</td>
</tr>
<tr>
<td>2</td>
<td>Click on the LOGOUT button located at the right-top of the Summary Screen.</td>
</tr>
</tbody>
</table>

C. Forgot ODIN Password

If you forget your password, you are able to get a new one by taking the following steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Call or email the Coordinator of your local LTCOP to request a password reset. You will receive a temporary password.</td>
</tr>
<tr>
<td>2</td>
<td>Once you receive a temporary password, immediately change the temporary password to a secure password by following the subsequent steps.</td>
</tr>
<tr>
<td>3</td>
<td>Access the Login page for ODIN (see page 11).</td>
</tr>
<tr>
<td>4</td>
<td>Type your username and temporary password into the appropriate fields.</td>
</tr>
</tbody>
</table>

Click on LOGIN button to open the RESET PASSWORD screen.
5 Create and type a new secure password into the appropriate fields and click on the SUBMIT button.

**ATTENTION!** Remember: Do not share your password with anyone. When updating or changing your password, use a secure password. Generally, a secure password contains a combination of upper and lower case letters, numbers and special characters, such as %, A, # and &.
IV. ODIN Screens

As an Ombudsman, the majority of your work will be done in two (2) major sections of ODIN – Cases and Activities. Both of these sections have two basic screens – a Summary Screen and an Accordion Screen. It is from these screens that the other ODIN screens are accessed.

The Accordion Screen is the screen from which you will build the other components of an ODIN record. It is accessed by clicking on the Create button on either of the Summary screens. The Activities Accordion Screen can also be accessed by clicking on the View button on the Activities Summary Screen. When displayed, the Accordion Screen is super-imposed over the Summary Screen.

❖ NOTE: Screen prints are available in the Appendix of this Guide.

• Cases Screens
  1. Cases Summary Screen
     a. Displays cases in case number order.
     b. This screen opens with the “1. General Information” tab expanded & superimposed over the Cases Summary screen. The superimposed screen hereinafter in this Guide is referred to as the Case Accordion screen.
     c. Cases available to an Ombudsman have a VIEW button displayed to the left of the case number.
     d. To create a new case record, click on the CREATE button in the upper left hand corner of the Cases Summary Screen.

❖ NOTES:
  • Once you have successfully logged in, the Cases Summary Screen will display, showing all of the cases in our office that have not yet been closed and reviewed by the Coordinator.

  • Validated & Closed Cases:
    o Closed cases that have not been reviewed by the Coordinator will show the word “Review” in a pale color to the left of the case number; there will be a check mark in the “Validated” column, and the Closed Date column will have been auto-populated by ODIN with the date entered on the “Closed” journal entry.
    o Closed cases which have been reviewed by the Coordinator are no longer has accessible to Ombudsmen, nor will it appear on the Cases Summary Screen.

  2. Case Accordion Screen, includes the following tabs –
     a. General Information Tab
     b. Complaints Tab
     c. Residents Tab
     d. Facility Tab
     e. Journals Tab
     f. Perpetrator Tab
Activities Screens

1. Activities Summary Screen
   a. The Activities Summary Screen is the base screen for the activities database.
   b. This screen is reached by clicking on the “GO TO” menu, (located at the top left side, of the Cases Summary Screen.
   c. Activities are displayed in case number order.
   d. To create and build a new activity record, click on the “Create” button, upper left, on the Activities Summary Screen. Clicking on the “Create” button will cause the “New Activity Screen” dialog box to appear, superimposed over the Activities Summary Screen.
   e. All activity records are accessible, even after they have been validated and closed. If you open a validated and closed activity record, you will need to validate and close it again.

2. Activities Accordion Screen, which includes the following –
   a. General Information Tab
   b. Consultation Tab
   c. Training Tab
   d. Attachments Tab
   e. Location Tab
   f. Witnessing Tab

   ❖ NOTE: The number in parenthesis on Accordion Screen tabs identifies the number of entries recorded on that tab.
V. **QUICK STEPS**

A. **CASES**

1. **Documenting in a Case Record**

<table>
<thead>
<tr>
<th>STEP</th>
<th>STARTING SCREEN / TAB / FIELD</th>
<th>ACTION</th>
<th>RESULTING SCREEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CASE ACCORDION SCREEN - JOURNALS</td>
<td>Click on &quot;Add New&quot;</td>
<td>JOURNAL ENTRY SCREEN</td>
</tr>
<tr>
<td>2</td>
<td>📅 Journal Type Field</td>
<td>Click in the Journal Type field or drop-down button to display list. Select Journal Type.</td>
<td>JOURNAL ENTRY SCREEN</td>
</tr>
<tr>
<td>3</td>
<td>📅 Date of Event Field</td>
<td>The field will have the current date auto-populated in it. Change the Date of Event, if necessary.</td>
<td>JOURNAL ENTRY SCREEN</td>
</tr>
<tr>
<td>4</td>
<td>📅 Case Time Field</td>
<td>Enter time worked by Ombudsman completing actions on the Case. Enter time in hours and minutes. <strong>NOTE:</strong> As you record time in these fields, ODIN calculates the times and adds the sum to the corresponding categories in the Total Time field displayed on the lower right corner of the Case Accordion screen.</td>
<td>JOURNAL ENTRY SCREEN</td>
</tr>
<tr>
<td>5</td>
<td>Travel Time</td>
<td>Enter time spent by Ombudsman on travel needed to complete the case. Enter time in hours and minutes.</td>
<td>JOURNAL ENTRY SCREEN</td>
</tr>
<tr>
<td>6</td>
<td>📝 Notes Field</td>
<td>Enter narrative/documentation.</td>
<td>JOURNAL ENTRY SCREEN</td>
</tr>
</tbody>
</table>

If attaching a document to the Case record, enter a statement indicating that there is an Attachment to the Case. See steps to 11. **Adding Attachments to a Case Record.**
**NOTE:**

For an **INTAKE SUMMARY** Journal Type, you must enter the name of the certified Ombudsman or staff person who received the Complaint in the **Intake Person Field** on the **JOURNAL ENTRY SCREEN**.
## 2. Adding Attachments to a Case Record

<table>
<thead>
<tr>
<th>STEP</th>
<th>STARTING SCREEN / TAB / FIELD</th>
<th>ACTION</th>
<th>RESULTING SCREEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CASE ACCORDION SCREEN – Journals Tab</td>
<td>Click on “Add New”</td>
<td>JOURNAL ENTRY SCREEN</td>
</tr>
<tr>
<td>2</td>
<td>Journal Type Field</td>
<td>Click in the Journal Type field or drop-down button to display list. Select a Journal Type-Intake, Action, Closed, or <strong>(Recommended)</strong> –</td>
<td>JOURNAL ENTRY SCREEN</td>
</tr>
<tr>
<td></td>
<td><strong>Journal Type</strong></td>
<td><strong>If attaching...</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SOC 341</td>
<td>SOC 341- Report of Suspected Dependent Adult/Elder Abuse</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consent Obtained</td>
<td>1. OSLTCO S202 - Authorization to Release Confidential Information and/or Testify at a Deposition, Court Hearing or Trial 2. OSLTCO S201 - Consent to Access and Disclose Confidential Information</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Information Section</td>
<td>Complete fields in the Information Section as identified in the steps to Documenting in a Case Record.</td>
<td>JOURNAL ENTRY SCREEN</td>
</tr>
<tr>
<td>4</td>
<td>Information Section – Notes Field</td>
<td><strong>NOTE: You must enter a statement indicating that there is an Attachment to the Case record.</strong> Provide a brief description or title of document to be attached – i.e. “Investigation Notes”, “copy of AHCD”, etc.</td>
<td>JOURNAL ENTRY SCREEN</td>
</tr>
<tr>
<td>5</td>
<td>Attachments Section</td>
<td>Click on SELECT button in the Step 1. Select Files to Upload section.</td>
<td>DOCUMENTS LIBRARY SCREEN</td>
</tr>
</tbody>
</table>
| 6    | ODIN User’s DOCUMENTS LIBRARY SCREEN | Select the Document File to be attached:  
- Click on the name of the File.  
- Click on the OPEN button or double-click on the name of the File. | JOURNAL ENTRY SCREEN |
Click on the UPLOAD button in the Step 2. Click Upload section to attach the File to the Case record.

**NOTE:** The name of the File will display in the Uploaded Files grid, along with the following buttons –

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download</td>
<td>Allows User/reader to retrieve and review attached document</td>
</tr>
<tr>
<td>Delete</td>
<td>Allows User to delete attachment from Case record</td>
</tr>
</tbody>
</table>

Click on the SAVE button to record the Journal Entry and Attachment.

Click on the SAVE button, **if you have no other information to enter.** You will need to enter all required information to Validate & Close the Case record.