



Department of Behavioral Health INFORMATION NOTICE 17-03

Date: March 1, 2017

To: All Department of Behavioral Health (DBH) Mental Health Staff
and Contract Agencies

From: Veronica Kelley, LCSW, Director

A handwritten signature in blue ink, appearing to read "Veronica Kelley, LCSW".

Subject: SIMON Update

Purpose Enhancements have been made to the Mental Health Services (MHS) screens in SIMON, and this Information Notice (IN) explains these enhancements.

Changes The following screens have been changed or added:

- Client Registration (change)
- Client Maintenance (change)
- Prevention and Early Intervention (PEI) Screen (addition)

**MHS Client
Registration /
Maintenance
Screen
Changes**

The Client Registration and the Client Maintenance screens will now display three (3) new fields:

• Sex: The Medi-Cal Eligibility Data System Monthly Extract File (MMEF) will automatically populate this field; no data entry is available.

• Birth Date: The MMEF will automatically populate this field; no data entry is available.

Veteran Status: DBH added this new required field to the Client Registration and the Client Maintenance screen; it must be populated.

Valid values for this field are:

- 1 – Yes
- 2 – No
- 3 – Declined to answer

Important Note: The Veteran Status field is mandatory, and users will not be able to save/exit the screen unless the field is populated.

See [Appendix A](#) for sample of the Client Registration and Client Maintenance screens showing these three (3) fields.



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MHS / New PEI Screen

DBH added a new PEI screen. Users may locate this new screen by selecting PEI under the CLIENTS menu. This screen captures the consolidated list of demographics reporting elements for PEI services.

See [Appendix B](#) for an example of the Client Maintenance Menu screen showing the PEI option.

From the PEI screen, users will enter a client number and select the appropriate option:

- “I” to insert a new record
- “L” for lookup
- “U” for updating an existing record

See [Appendix C](#) for an example of the new PEI Maintenance screen.

All clients registered or updated after the SIMON update is installed will be added to the Client PEI table. The client’s record in the Client PEI table will have the Veteran Status field already populated, and users will need to go to the PEI screen to populate the remaining fields.

To populate the new PEI screen fields for:

- A new client
- Go to the PEI screen
- Select “U”: Update to look up PEI record for a new client
- and populate all remaining PEI fields

- For existing clients without any PEI data
- Go to the PEI screen
- Select “I”: Insert and populate all remaining PEI fields

See [Appendix D](#) and [Appendix E](#) for a sample of the PEI Update and Insert screens.

See [Appendix F](#) for a list of the valid PEI codes to use when populating the fields in the PEI screens.

Questions

For questions regarding this Information Notice, please contact DBH Information Technology at 909-884-4884 or submit a helpdesk ticket.



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APPENDIX A

Client Registration Screen

New Fields: Birthdate, Sex, and Veteran Status

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Client Registration
Reporting Unit: |
Last: First: Middle:
Generation: Birthdate: [ ]/[ ]/[ ] Sex: [ ] SSN: - -
CIN:
Education: Other Factors: Other ID:
Disability: Service Group: Local Code:
Language: Primary RU: Program Code:
Ethnicity: Chart Location: Research Item:
Hispanic Origin: Ref. Staff ID: Veteran Status: [ ]
Marital Status: Care Giver Under 18: 18+ Enter Address:
Family Size: Significant Others: N
Annual Income:
Aliases Last First Middle
Form Ok Y/N: Confidential Information USER: RETZIUS
Enter a registration provider code.

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Client Maintenance screen

New Fields: Birthdate, Sex, and Veteran Status

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Client Maintenance
Client Number: [ ] Maintenance Type:
Last: First: Middle:
Generation: Birthdate: [ ]/[ ]/[ ] Sex: [ ] SSN: 000-00-0000
CIN:
Education: Other Factors: Other ID:
Disability: Service Group: Local Code:
Language: Primary RU: Program Code:
Ethnicity: Chart Location: Research Item:
Hispanic Origin: Ref. Staff ID: Veteran Status: [ ]
Marital Status: Care Giver Under 18: 18+ Client UR Needed:
Family Size:
Annual Income:
Aliases Last First Middle
Form Ok Y/N: Confidential Information USER: RETZIUS

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APPENDIX B

Client Maintenance Menu Screen

Shows option to select PEI Screen

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29-Aug-16 09:44 AM

Mental Health (E1)
Client Maintenance Menu

Selection:

Selection	Description
ECI	Electronic Client Information
ADDRESS	Address Maintenance
LOCATOR	Retrieval of Client Information
CSI_PERIOD	CSI Periodic Maintenance
SUPPLEMENT	Supplemental Client Data Menu
<input checked="" type="checkbox"/> PEI	Prevention and Early Intervention 

APPENDIX C

New PEI Maintenance Screen

Enter Type of Maintenance "I" or "U"

PEI Maintenance

Client Number: 

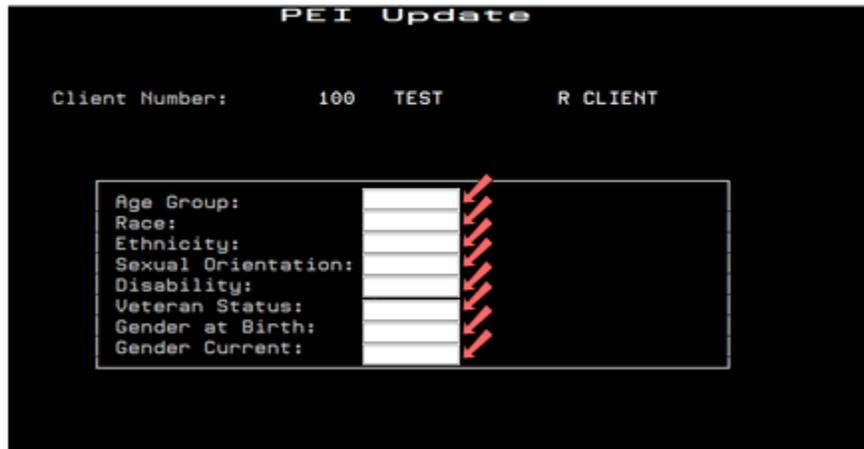
Maintenance Type:

APPENDIX D

New PEI Update Screen

Shows the list of demographic reporting elements for PEI

Enter valid PEI codes from list of Appendix F



PEI Update

Client Number: 100 TEST R CLIENT

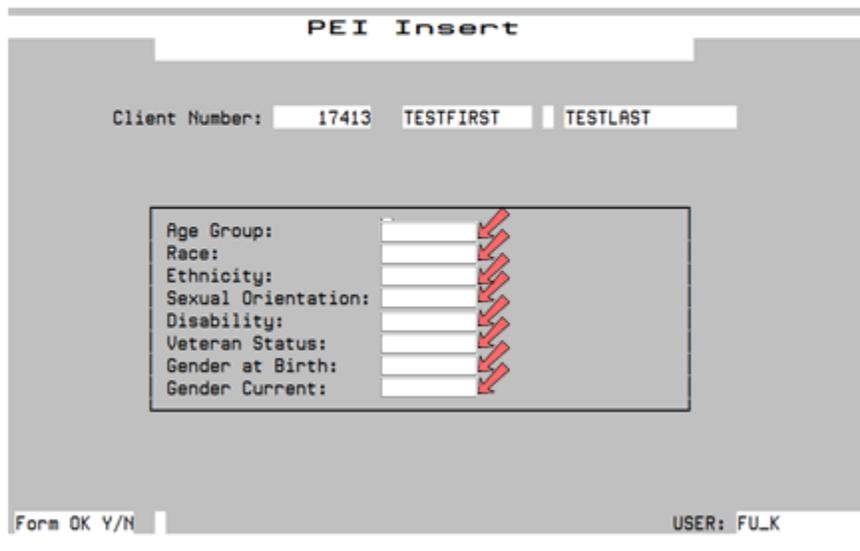
Age Group:	<input type="text"/>	↙
Race:	<input type="text"/>	↙
Ethnicity:	<input type="text"/>	↙
Sexual Orientation:	<input type="text"/>	↙
Disability:	<input type="text"/>	↙
Veteran Status:	<input type="text"/>	↙
Gender at Birth:	<input type="text"/>	↙
Gender Current:	<input type="text"/>	↙

APPENDIX E

New PEI Insert Screen

Shows the list of demographic reporting elements for PEI

Enter valid PEI codes from list of Appendix F



PEI Insert

Client Number: 17413 TESTFIRST TESTLAST

Age Group:	<input type="text"/>	↙
Race:	<input type="text"/>	↙
Ethnicity:	<input type="text"/>	↙
Sexual Orientation:	<input type="text"/>	↙
Disability:	<input type="text"/>	↙
Veteran Status:	<input type="text"/>	↙
Gender at Birth:	<input type="text"/>	↙
Gender Current:	<input type="text"/>	↙

Form OK Y/N USER: FU_K



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APPENDIX F

List of Valid PEI Codes

PEI Code Type	PEI Code Value	PEI Label
AGE_GROUP	1	0-15 (children/youth)
AGE_GROUP	2	16-25 (transition age youth)
AGE_GROUP	3	26-59 (adult)
AGE_GROUP	4	Ages 60+ (older adults)
AGE_GROUP	5	Declined to answer
DISABILITY	1A1	Communication - Difficulty seeing
DISABILITY	1A2	Communication - Difficulty hearing or having speech understood
DISABILITY	1A3	Communication - Other (specify)
DISABILITY illness	1B	Mental domain not including mental
DISABILITY	1C	Physical/mobility domain
DISABILITY	1D	Chronic health condition
DISABILITY	1E	Other (specify)
DISABILITY	2	No
DISABILITY	3	Declined to answer
ETHNICITY	1A	Hispanic or Latino - Caribbean
ETHNICITY	1B	Hispanic or Latino - Central American
ETHNICITY	1C	Hispanic or Latino - Mexican/Mexican-American/Chicano
ETHNICITY	1D	Hispanic or Latino - Puerto Rican
ETHNICITY	1E	Hispanic or Latino - South American
ETHNICITY	1F	Hispanic or Latino - Other
ETHNICITY	1G	Hispanic or Latino - Declined to answer
ETHNICITY	2A	Non-Hispanic or Non-Latino - African
ETHNICITY Indian/South	2B	Non-Hispanic or Non-Latino - Asian Asian
ETHNICITY	2C	Non-Hispanic or Non-Latino - Cambodian
ETHNICITY	2D	Non-Hispanic or Non-Latino - Chinese
ETHNICITY European	2E	Non-Hispanic or Non-Latino - Eastern
ETHNICITY	2F	Non-Hispanic or Non-Latino - European
ETHNICITY	2G	Non-Hispanic or Non-Latino - Filipino
ETHNICITY	2H	Non-Hispanic or Non-Latino - Japanese
ETHNICITY	2I	Non-Hispanic or Non-Latino - Korean
ETHNICITY Eastern	2J	Non-Hispanic or Non-Latino - Middle
ETHNICITY	2K	Non-Hispanic or Non-Latino - Vietnamese
ETHNICITY	2L	Non-Hispanic or Non-Latino - Other



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APPENDIX F

List of Valid PEI Codes (cont'd)

ETHNICITY answer	2M	Non-Hispanic or Non-Latino-Declined to
ETHNICITY	3	More than one ethnicity
ETHNICITY	4	Declined to answer
GENDER_AT_BIRTH	A	Male
GENDER_AT_BIRTH	B	Female
GENDER_AT_BIRTH	C	Declined to answer
GENDER_CURRENT	A	Male
GENDER_CURRENT	B	Female
GENDER_CURRENT	C	Transgender
GENDER_CURRENT	D	Genderqueer
GENDER_CURRENT identity	E	Questioning or unsure of gender
GENDER_CURRENT	F	Another gender identity
GENDER_CURRENT	G	Declined to answer
RACE	1	American Indian or Alaska Native
RACE	2	Asian
RACE	3	Black or African American
RACE	4	Native Hawaiian or other Pacific Islander
RACE	5	Caucasian
RACE	6	Other
RACE	7	More than one race
RACE	8	Declined to answer
SEXUAL_ORIENTATION	1	Gay or Lesbian
SEXUAL_ORIENTATION	2	Heterosexual or Straight
SEXUAL_ORIENTATION	3	Bisexual
SEXUAL_ORIENTATION orientation	4	Questioning or unsure of sexual
SEXUAL_ORIENTATION	5	Queer
SEXUAL_ORIENTATION	6	Another sexual_orientation
SEXUAL_ORIENTATION	7	Declined to answer the question
VETERAN_STATUS	1	Is a Veteran
VETERAN_STATUS	2	Is not a Veteran
VETERAN_STATUS	3	Declined to answer