Omnia Analyzer

2.5.6

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Harmony Information Systems, Inc.
25 New England Drive
Essex Junction, VT 05452

(802) 878-8514
Web site: http://www.harmonyis.com

Contents

Introduction 3

The Omnia System 4

Using Omnia Analyzer 5

Consumer Populations 7

Creating a Listed-Based Population....8
Creating a Criteria-Based Population....14
Consumer Populations Practice....20

Analysis Sets 21

Creating an Analysis Set....22
Analysis Set Filters....28
Analysis Set Practice....34

Report Creation 35

Consumer Listing Report....37
Question Listing Report....39
Cross-Tab Reports....41
Outcome Measurement Reports....43
Running Reports....44
Report Practice....45

Thanks! 46

Glossary of Terms 47

Introduction

Welcome to Omnia Analyzer training! During this half day course, you'll learn more about:

- Omnia Analyzer screen features
- Consumer Populations
- Analysis Sets
- Reports

This course assumes that you've already completed SAMS Advanced User Training or have a basic familiarity with SAMS. If at any time you have questions, please don't hesitate to ask them. We are here to help you learn.

Additional Resources

This training manual only provides an overview of Omnia Analyzer. It does not attempt to provide complete system information.

Omnia Analyzer has an online help system and printable manual. After logging in, press F1 or use the Help menu to access an indexed help system with step by step procedures. The manual, supplied in PDF format, contains the same information as the online help system.

If you need more help than the documentation can provide, check with your department's IT, MIS, or Omnia Analyzer subject matter expert. Any questions not resolved by your organization can be brought to the attention of the EOEA through a formal escalation process. The EOEA will work with Harmony Information Systems on questions that cannot be corrected or resolved at the state level.

The Omnia System

The Omnia® System is a comprehensive software suite that organizations across the country use to enter, manage, and share assessment data. The Omnia System consists of four cutting edge tools.

- Omnia Interviewer - a stand alone assessment system designed to take response information in the field. By using Omnia Interviewer, care managers can avoid entering responses on paper forms and then re-entering the same information into a database system. Omnia Interviewer users can easily retrieve SAMS consumer information, load assessment forms, and enter question responses.
- OmniaCE - Built for Microsoft's Pocket PC™ operating system, care managers can use OmniaCE to load assessment forms and client data to their hand-held PDAs prior to going into the field. Use the smaller Pocket PCs to encourage an open atmosphere with your clients and reduce the worry of equipment loss and breakage.
- Omnia Designer - create and modify custom assessment forms. Users build custom assessment forms by selecting items from an exhaustive catalog. The catalog is based on many popular assessment forms such as OASIS, SAMS Independent Living Assessment, MDS HomeCare Assessment, and others. The order in which the questions appear on the customized assessment forms, the categories under which they are organized, and the wording of the prompts are determined by the person creating the form. Organizations can use their customized forms in both Omnia Interviewer and SAMS.
- Omnia Analyzer - generate reports from Omnia Interviewer and SAMS assessment and consumer data. Users can compare data from different assessment forms within an agency or between agencies.

Harmony is the nation's leading provider of data management solutions for social services. The Omnia System answers the need for flexible assessment tools that can respond to changing assessment requirements, provide sharable and reusable data, and produce reports and statistics used for communication and analysis.

Using Omnia Analyzer

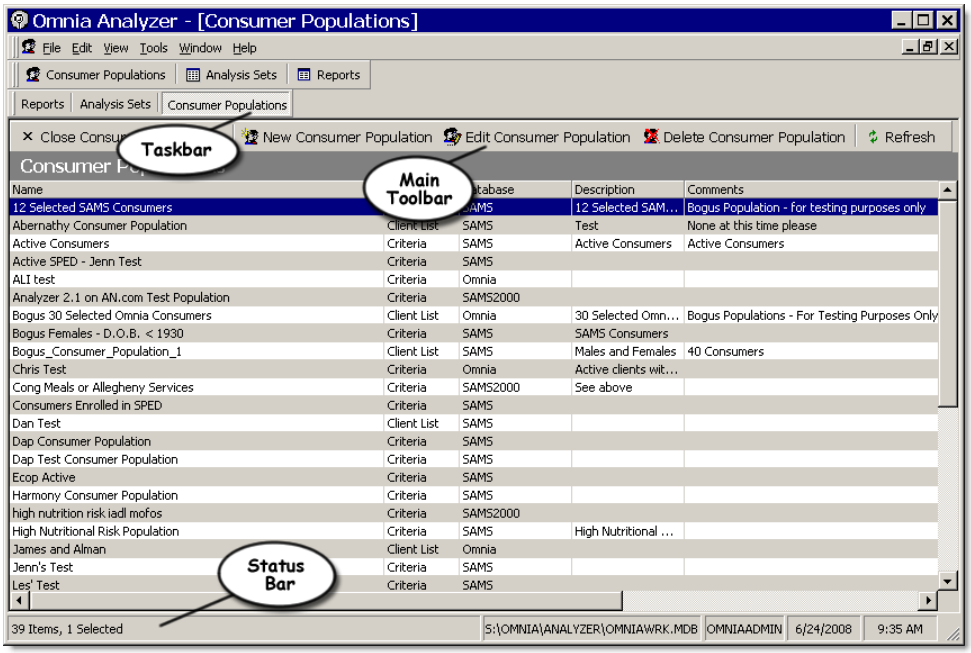
Users can enter assessment information, stored in the Omnia Repository, in either Omnia Interviewer or SAMS. Reports in SAMS, however, focus on information stored in the SAMS database. Omnia Analyzer was developed as a stand alone tool dedicated to analyzing consumer and assessment information.

Omnia Analyzer breaks down the report development process into three parts: *Consumer Populations,* A*nalysis Sets,* and *Reports*. A Consumer Population is a group of consumers you wish to report on. An Analysis Set lists the assessment questions and filters the data on the report. The final Report is generated by combining a Consumer Population and an Analysis Set.

In this training session, we'll walk you through creating Consumer Populations and Analysis Sets. We'll then discuss how to combine them to create reports by using one of the five Omnia Analyzer report types. Before we begin, let's review the parts of the Omnia Analyzer screen.

Parts of the Omnia Analyzer Screen (Top to Bottom)

- Title bar - title of the program window, found in every Windows-based application.
- Menus - located directly below the title bar. *Menus* access all program functions and data.
- Toolbars - a series of icons usually displayed below the menus. Click an icon to perform a function or access data.
- Task bar - located under the *Main Toolbar*. Omnia Analyzer can keep multiple work windows open. Use the task bar to switch between open windows.
- Status bar - the gray footer at the bottom of the screen. Displays the number of items in the Omnia database, the current *Login Profile*, your user name, and the current date and time.



Main Toolbar and Program Areas

Omnia Analyzer displays the *Main Toolbar* below the menus. Use this toolbar to access major program areas.

- Consumer Populations - create groups of consumers for reporting.
- Analysis Sets - modify and add fields to reports based on the Omnia Catalog or assessment forms.
- Reports - create reports using combinations of *Analysis Sets* and *Consumer Populations*.

Consumer Populations

You can keep more than one program area open at a time. Use the taskbar to switch between areas.

Consumer Populations, re-usable groups or types of consumers, are created using one of two methods.

In *List-based* (or "static populations") you create a list of consumers by selecting them one by one from the database. The list of consumers in the consumer population does not change unless edited.

*Criteria-based (*or "dynamic populations") use filters to create a list of consumers. Omnia Analyzer selects only those consumers that match the filter each time the report is run.

Let's look at creating both list-based and criteria-based consumer populations.

Creating a Listed-Based Population

The Massachusetts Aging Network consolidated databases produce long lists of SAMS and Omnia consumers. When selecting consumers, as in step 9, use Find to quickly locate the records you need.

➢ *To create a new Consumer Population*

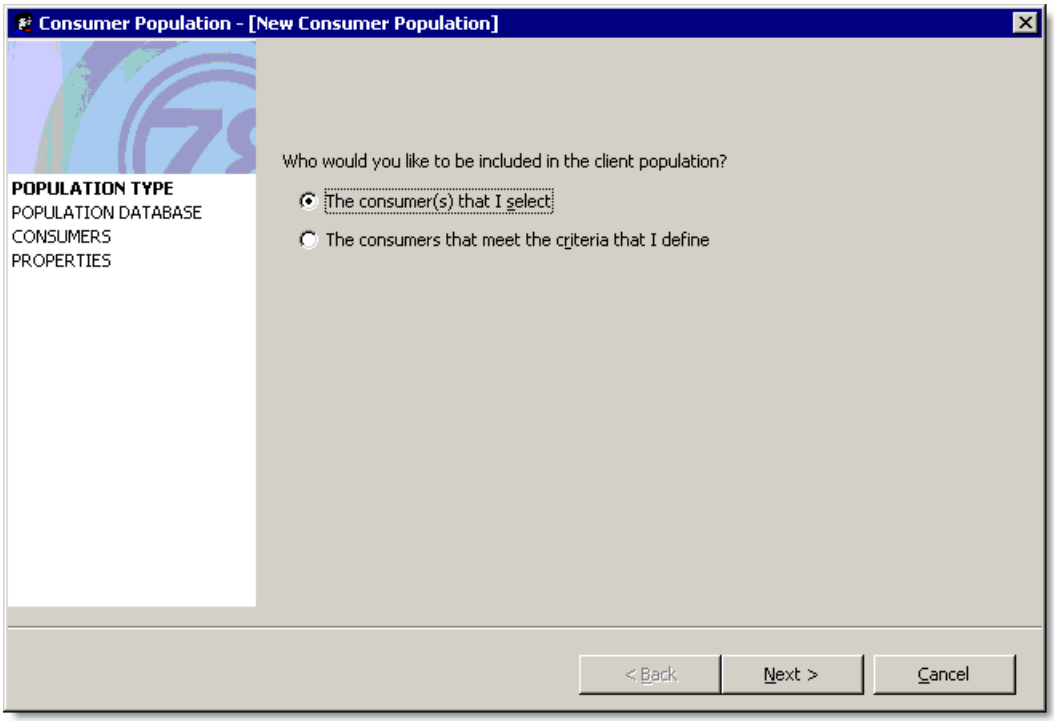
1 Start Omnia Analyzer.

2 Click Consumer Population on the toolbar.

3 Click New Consumer Population.

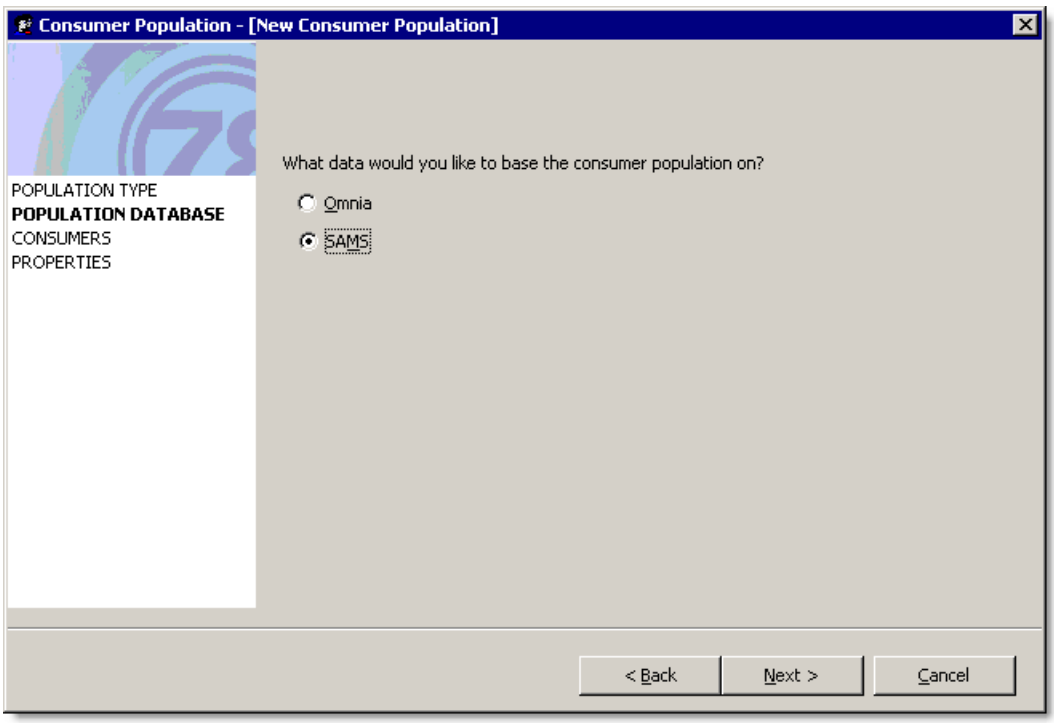
4 Select *The consumers that I select*.

Omnia Analyzer uses a Wizard, a series of step-by-step screens, to create and edit *Consumer Populations*.



5 Click Next>.

6 Select SAMS as the database for the consumer population. Reports using the Omnia Repository (database) will run faster. However, not all assessed consumers may have a record in the Omnia Repository. The SAMS database has a record for each assessed consumer due to how the Massachusetts Aging Network enters consumer information.



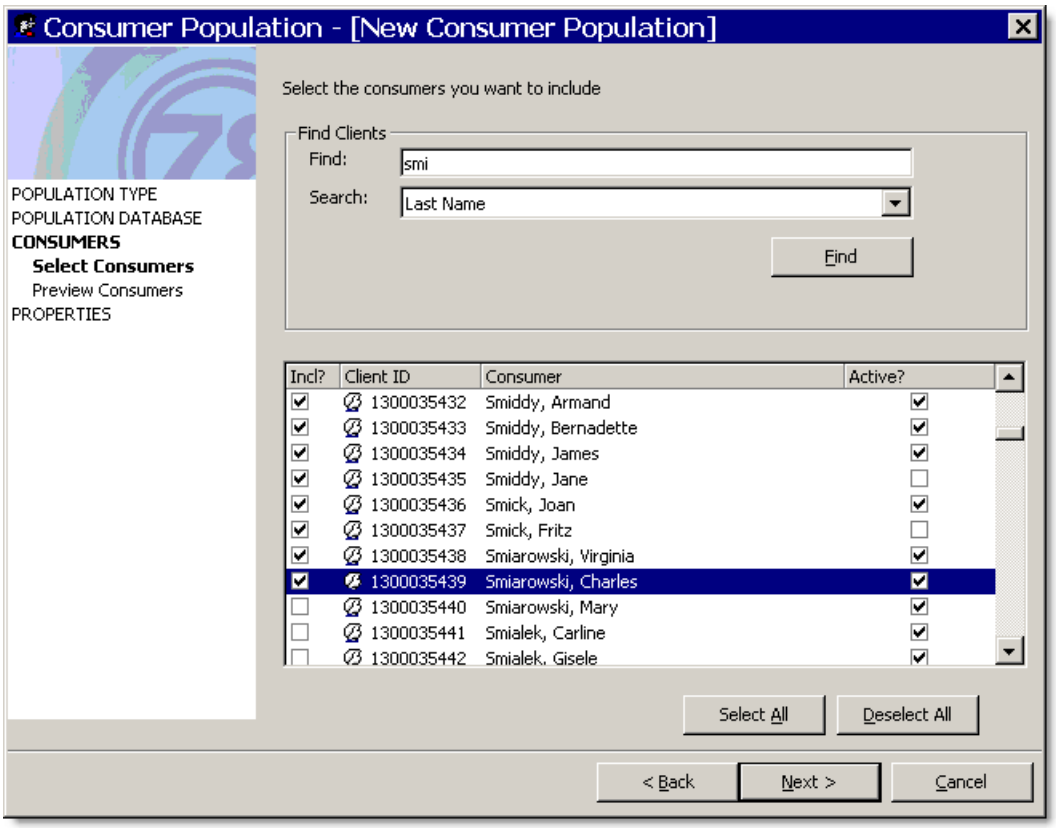
You can sort on the Client ID, Consumer, and Active? columns shown on the screen in chronological or reverse chronological order by clicking the appropriate column title.

7 Click Next>.

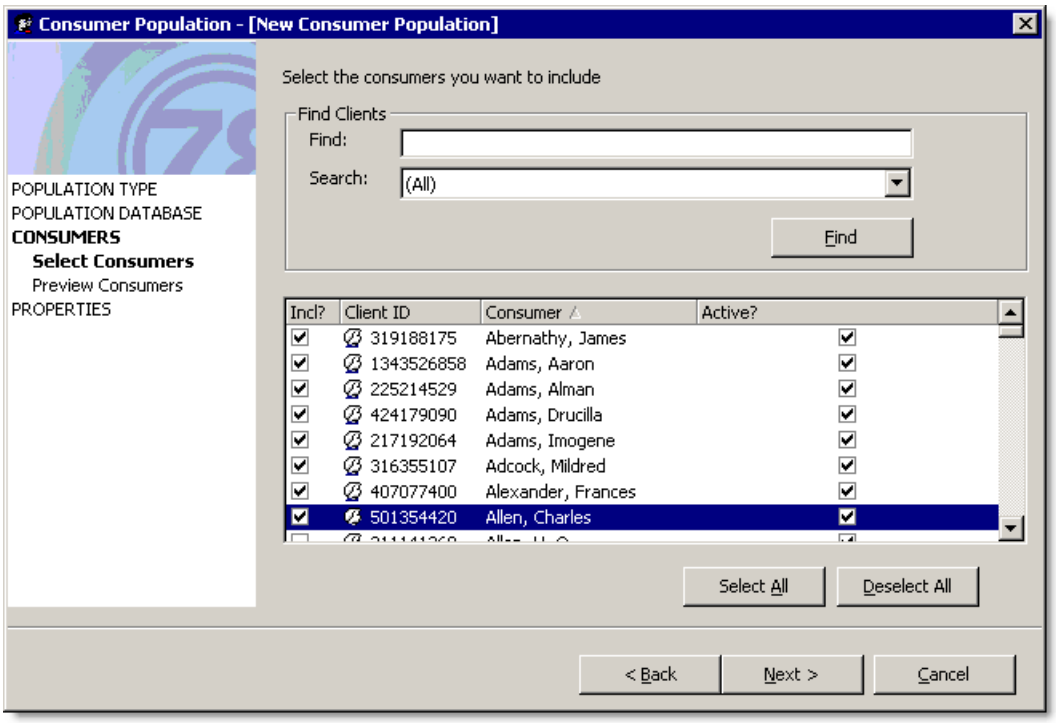
8 Omnia Analyzer displays a list of all consumers in the database you selected.

9 In *Find*, enter "Smi"

10 Select Last Name in *Search*. Search on *(All)* Omnia consumer fields, or *Consumer Identifier*, *Last Name*, *First Name*, *Date of Birth*, and/or *Social Security Number*.

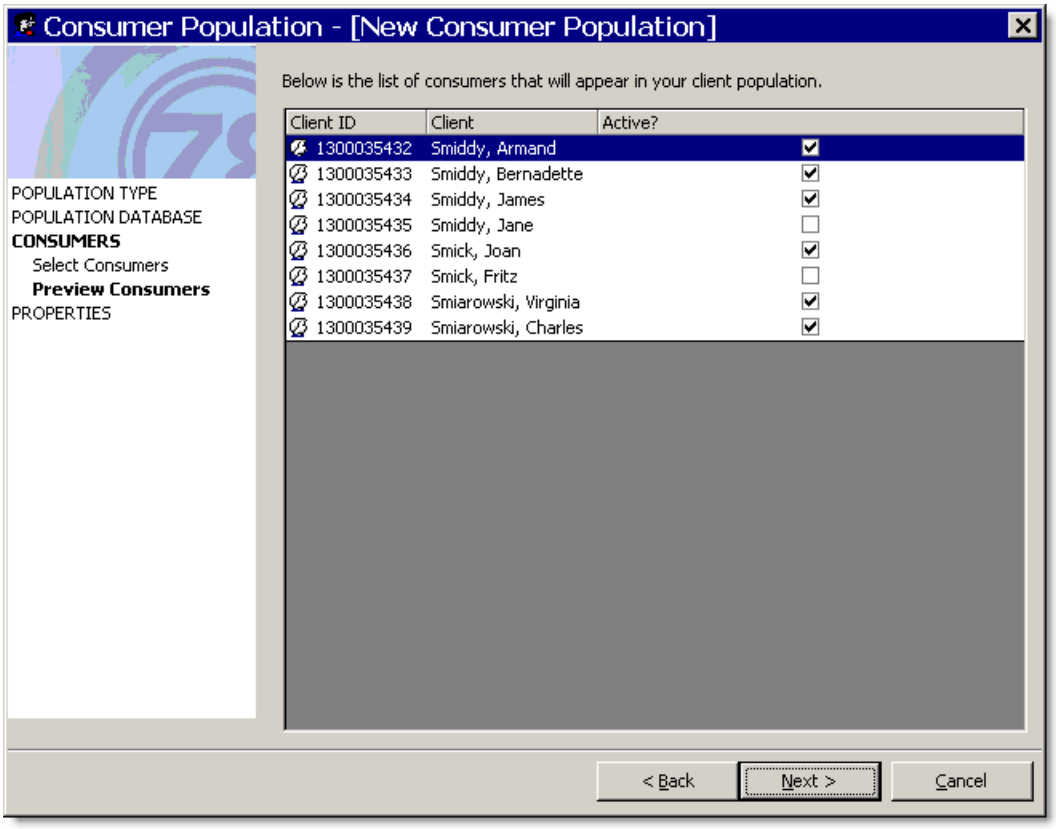


11 Select the first 8 consumers to include them in the *Consumer Population.*



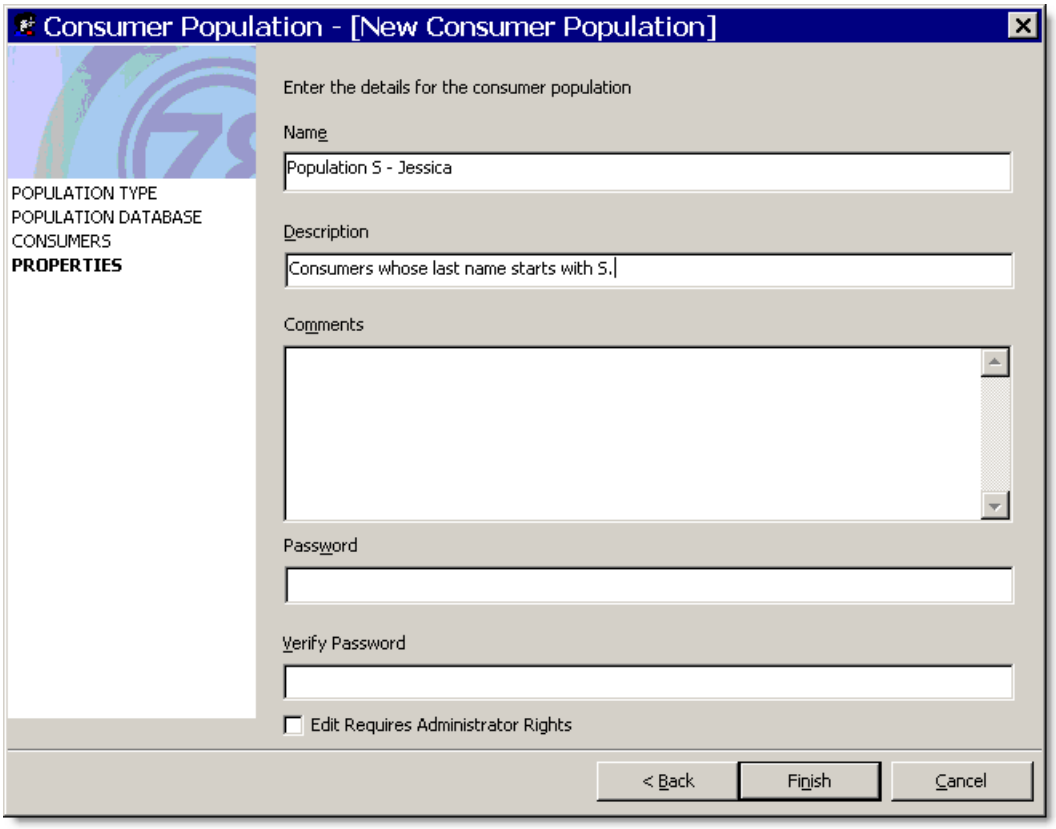
12 Click Next>.

13 Review the list of consumers Omnia Analyzer will include in the *Consumer Population*.



14 Click Next>.

15 Enter a *Name* of "Population S" with your name. Enter a *Description* of "Consumers whose last name starts with S."



16 If you need extra security for this *Consumer Population*, enter a *Password* and the *Verify (the) Password*. Omnia Analyzer prompts for the password when editing the consumer population. We'll skip entering a password for now.

17 If you select the Edit Requires Administrator Rights box, only users with administrative privileges can modify the population set. Let's leave that unselected for now.

18 Click Finish.

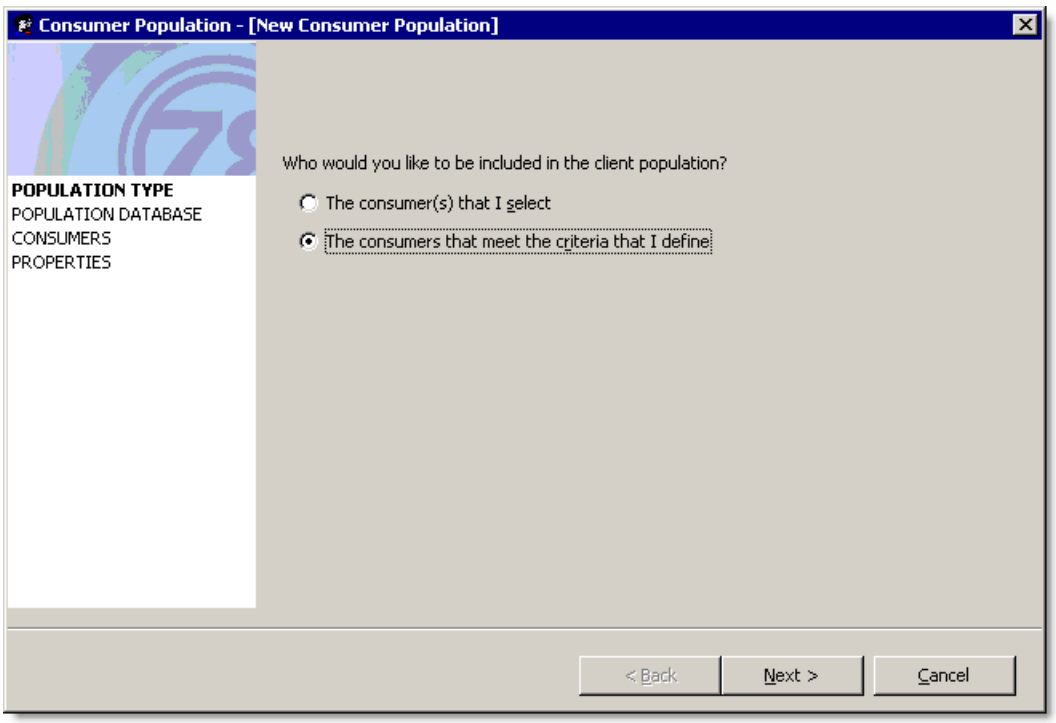
Creating a Criteria-Based Population

Dynamic, criteria-based populations are generally more flexible than the list-based versions. Omnia Analyzer selects only the consumers for the population that match the saved criteria during report generation.

➢ *To create a criteria-based population*

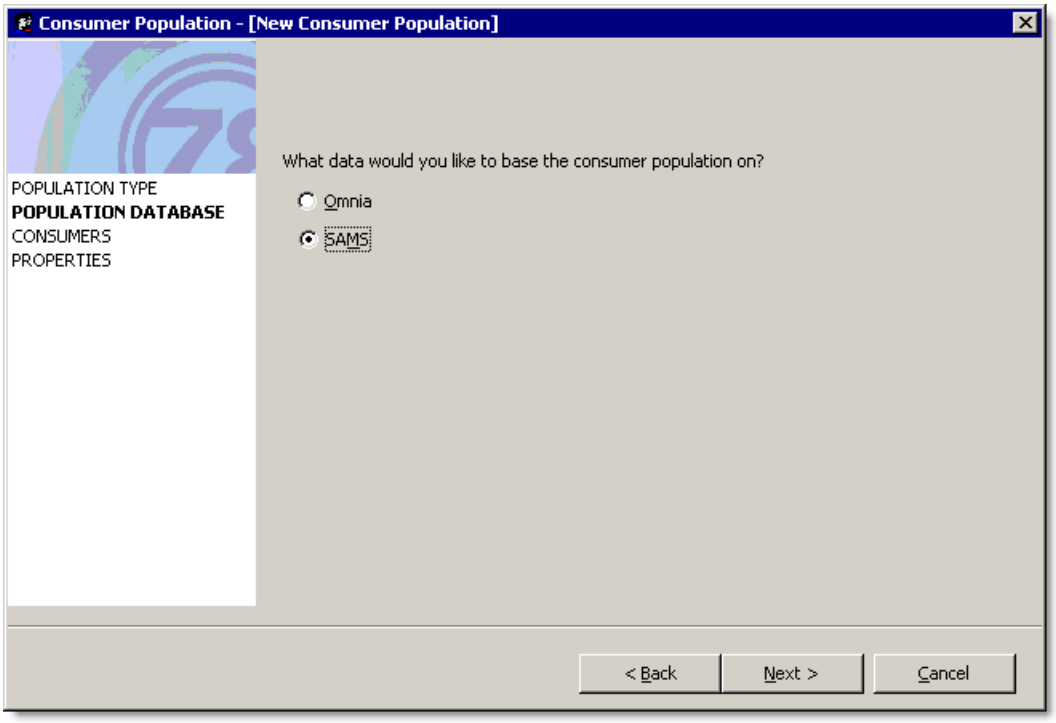
1 Click New Consumer Population .

2 Select *The consumers that meet the criteria I define.*



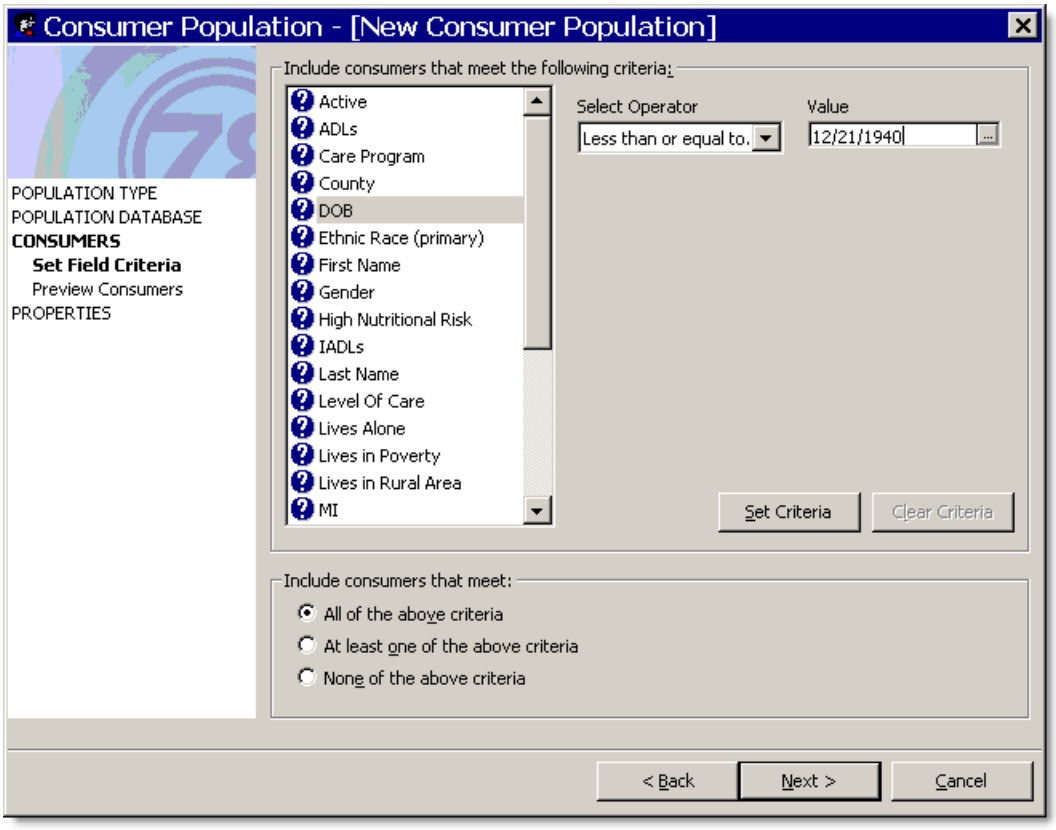
3 Click Next>.

4 Select SAMS as the consumer population database.



5 Click Next>.

6 Use *Set Field Criteria* to enter the characteristics of the consumers that you want Omnia Analyzer to select. Highlight DOB.

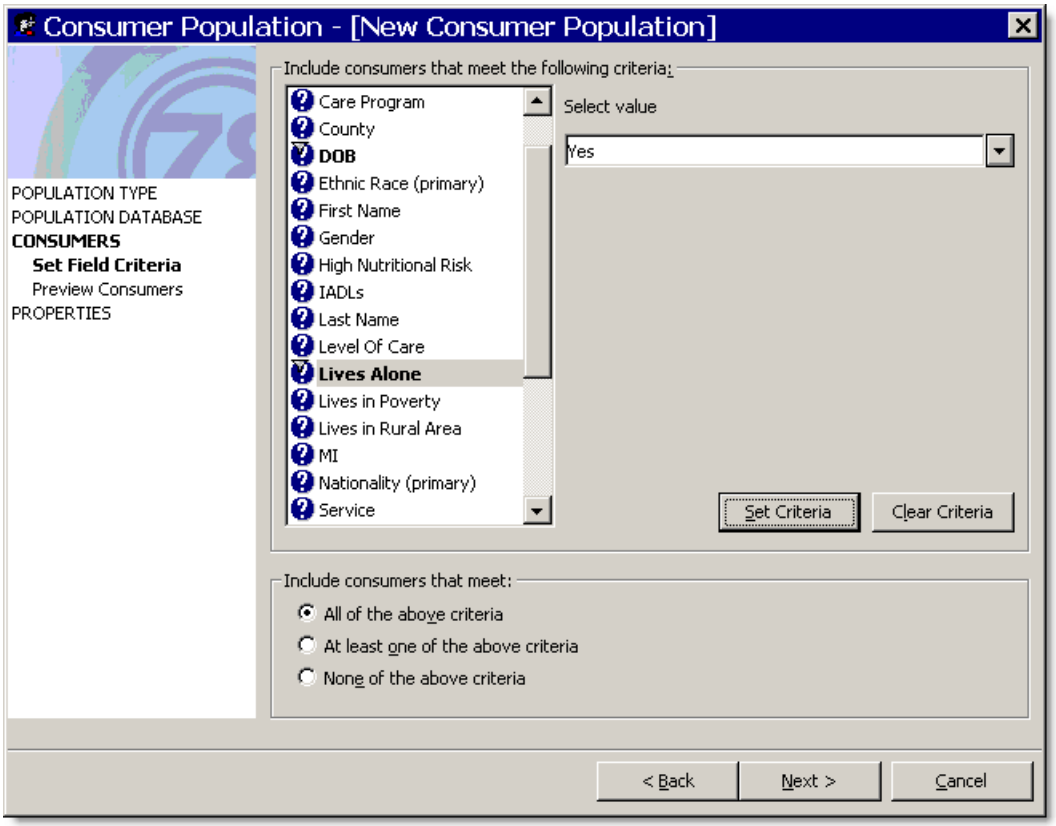


7 Select Less than or equal to... from the *Select Operator* list.

8 Enter "12/21/1940" as the *Value*. You can either enter the numbers manually or use the Browse [...] button to pop up a calendar.

9 Click Set Criteria.

10 Highlight Lives Alone.



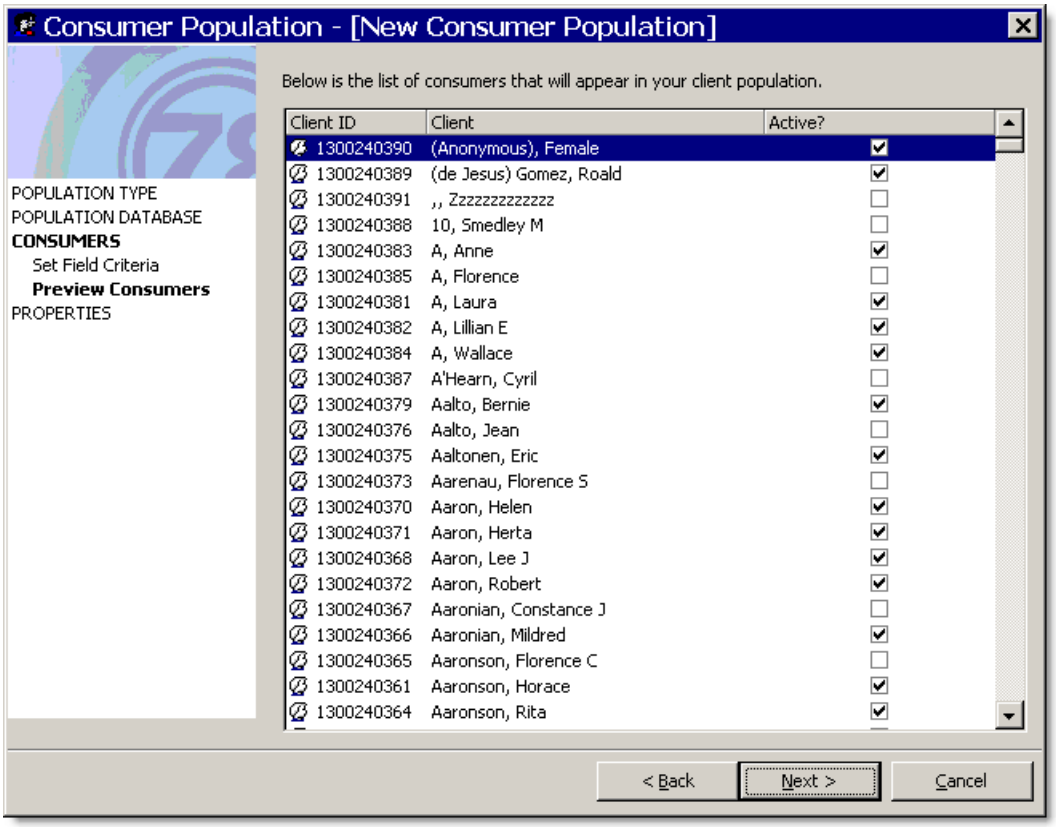
11 Select Yes from the *Select value* list.

12 Click Set Criteria.

13 In *Include consumers that meet*, make sure that All of the above criteria is selected.

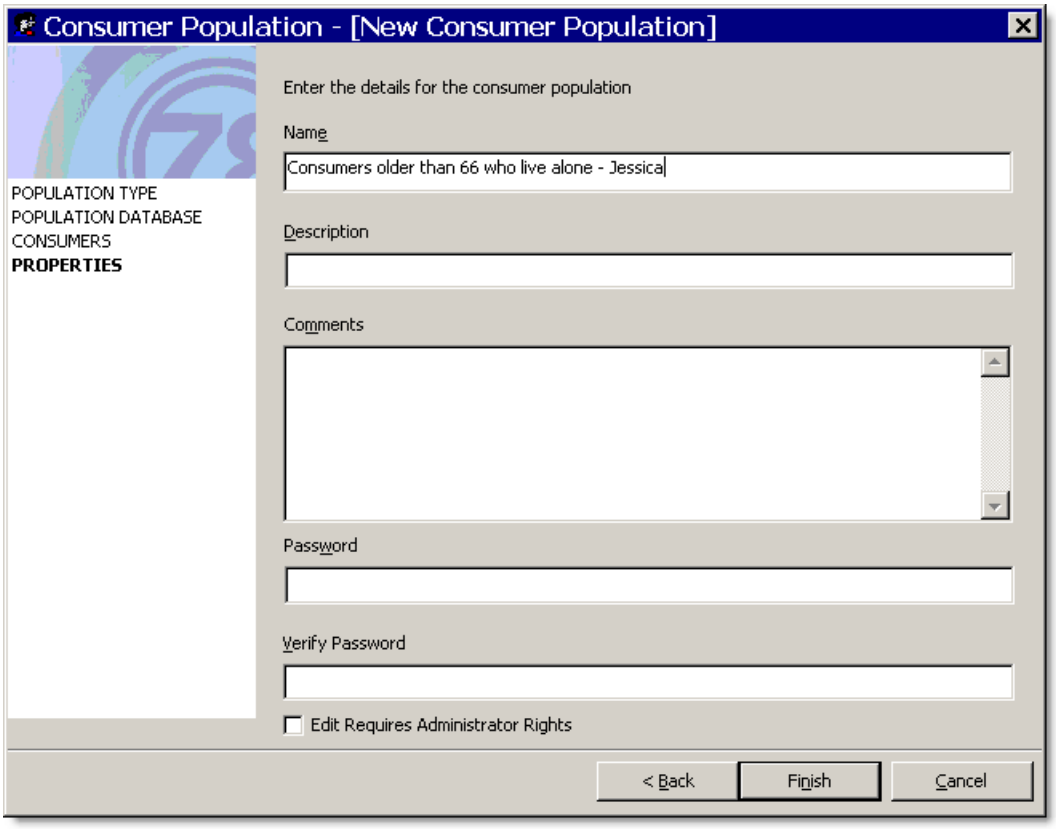
14 Click Next>.

15 Omnia Analyzer displays the list of consumers selected for the consumer population. Review the list and if you need to make any changes, click Back>. Your list should match the list below.



16 Click Next>.

17 Enter a *Name* of "Consumers older than 66 who live alone" with your name.



18 Click Finish.

Consumer Populations Practice

- Create a list-based population with 10 SAMS consumers whose last name starts with the letter "B".
- Use Find to add a consumer whose last name starts with M to the list by using a *Last Name* search.
- Enter "B Consumer Population" with your name as the *Name*.
- Create a criteria-based SAMS population that selects women older than 67.
- Name it "Females 67 and older" with your name.

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Analysis Sets

An *Analysis Set* creates a group of assessment questions that will appear on the report. Analysis Sets can also filter data to limit report information. Like Consumer Populations, you create and modify Analysis Sets using a Wizard.

Analysis Set Types

Select assessment questions for an analysis set using two different sources.

- Omnia Catalog - select questions from the Omnia Catalog, the database of all assessment questions. A report using a catalog based analysis set gathers information from all matching assessment questions, regardless of the assessment form used to enter the response.
- Assessment Form - pick assessment questions for the set from one or more assessment forms. The Analysis Set uses only response data entered into the selected assessment forms.

Indicators

Indicators are automatically calculated values (formulas) based on assessment responses. Organizations can create custom formulas that measure changes in assessment responses. For instance, the FIL is an indicator for the Massachusetts Aging Network. You can select indicators for reports in either assessment form or Omnia Catalog based analysis sets.

Creating an Analysis Set

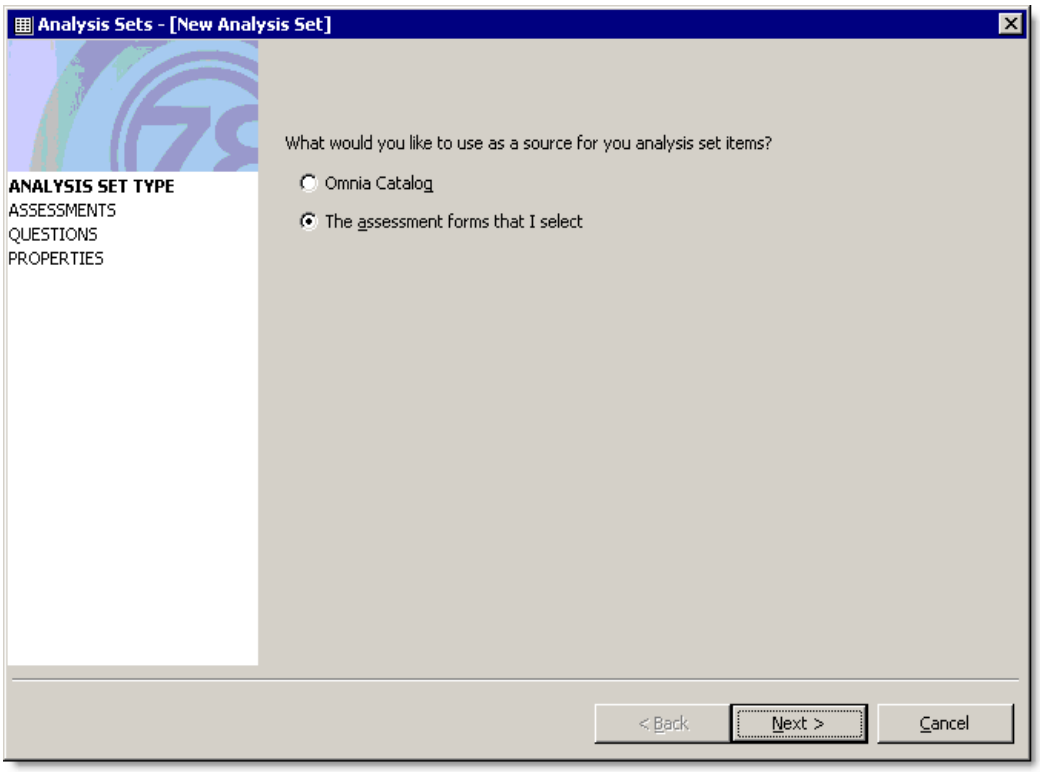
Let's create a straightforward analysis set based on an assessment form without filters.

➢ *To create an analysis set*

1 Click Analysis Sets .

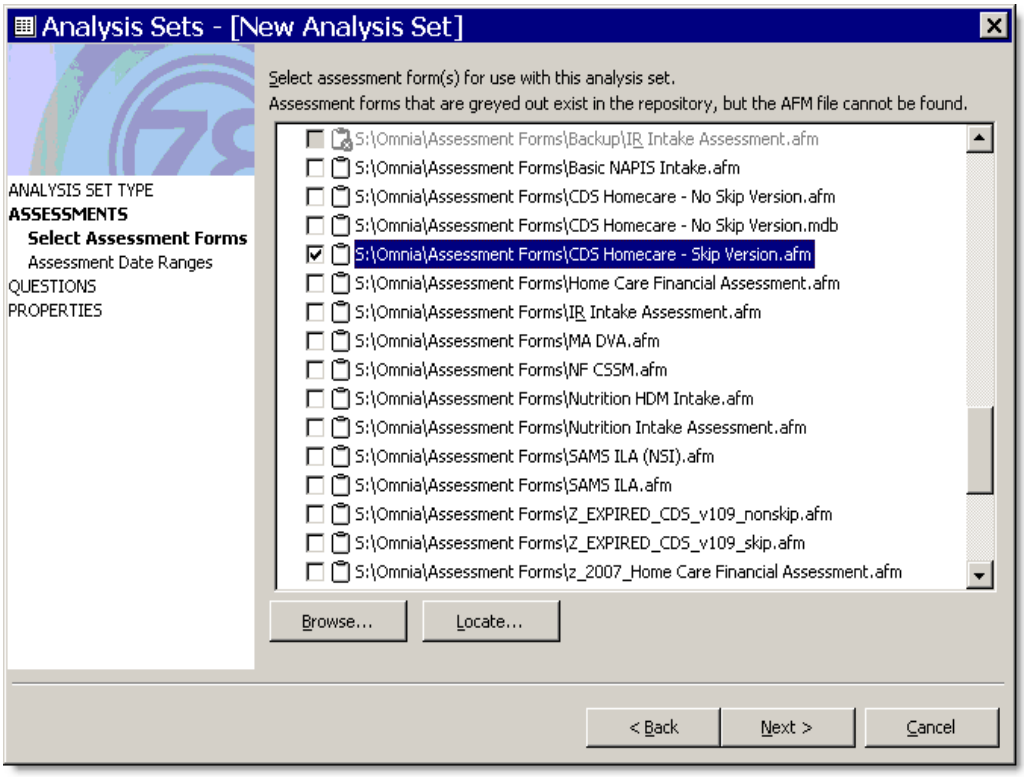
2 Click New .

3 Select The assessment forms that I select.



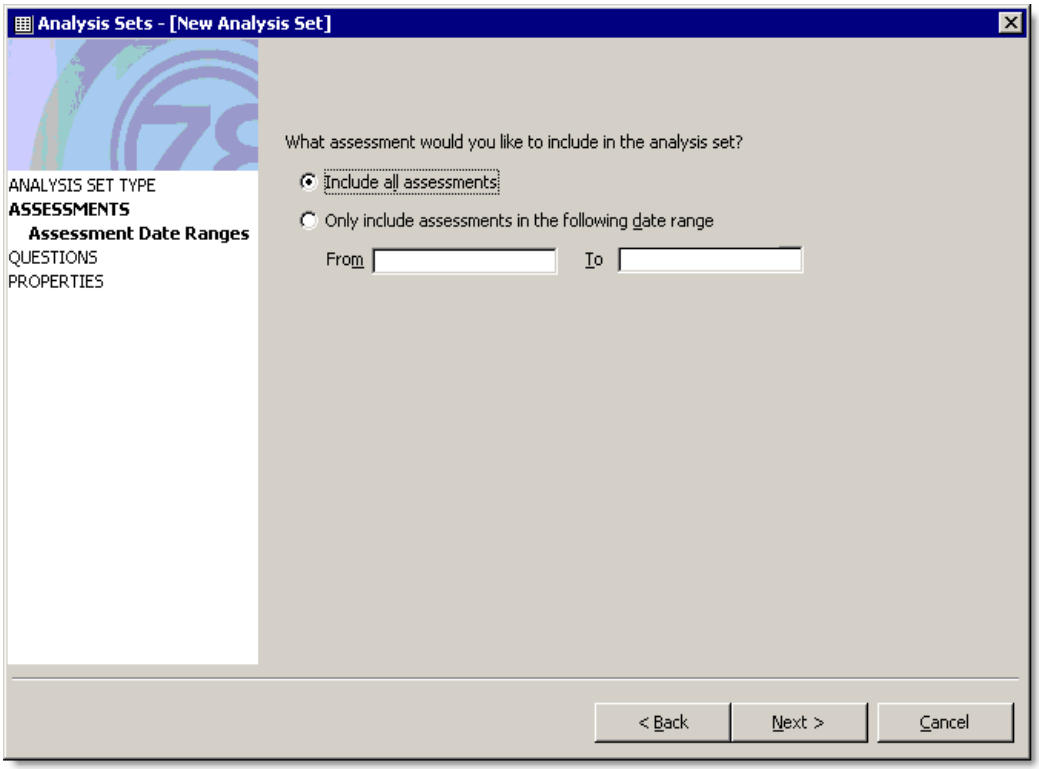
4 Click Next>.

5 Select an assessment form as directed by your trainer. You can select multiple forms if needed.



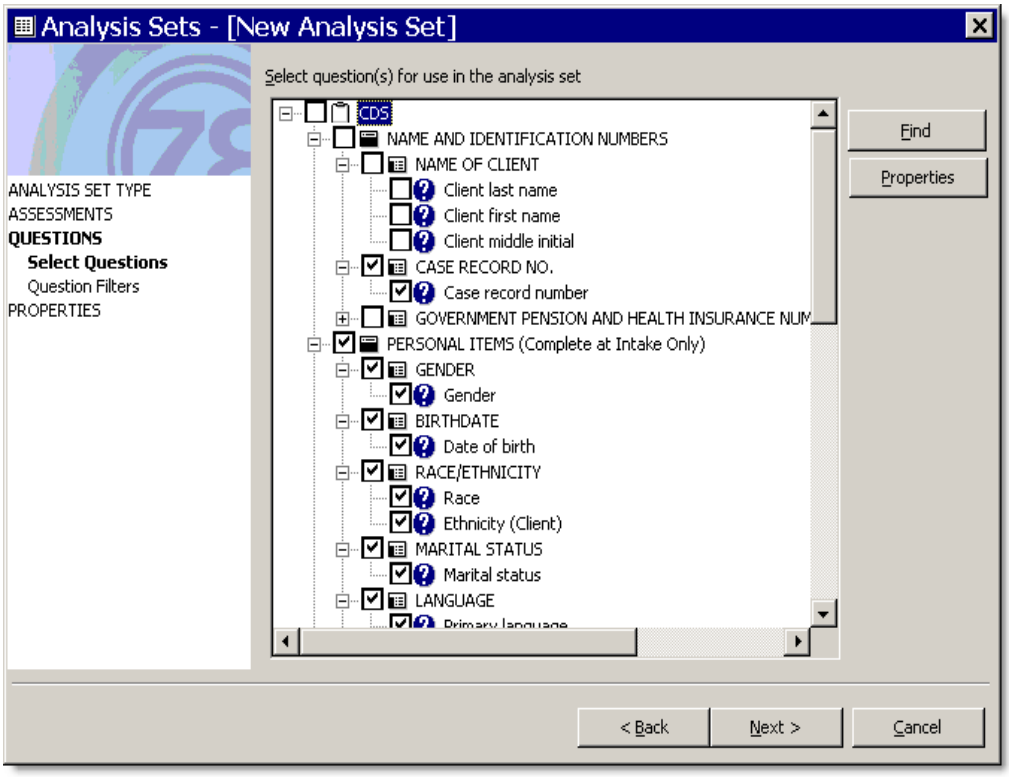
6 Click Next>.

7 Select Include all assessments for the *Assessment Date Range*. You can also choose to enter a range of assessment dates. Omnia Analyzer uses the *Assessment Session Date* to determine if an assessment falls within a date range.



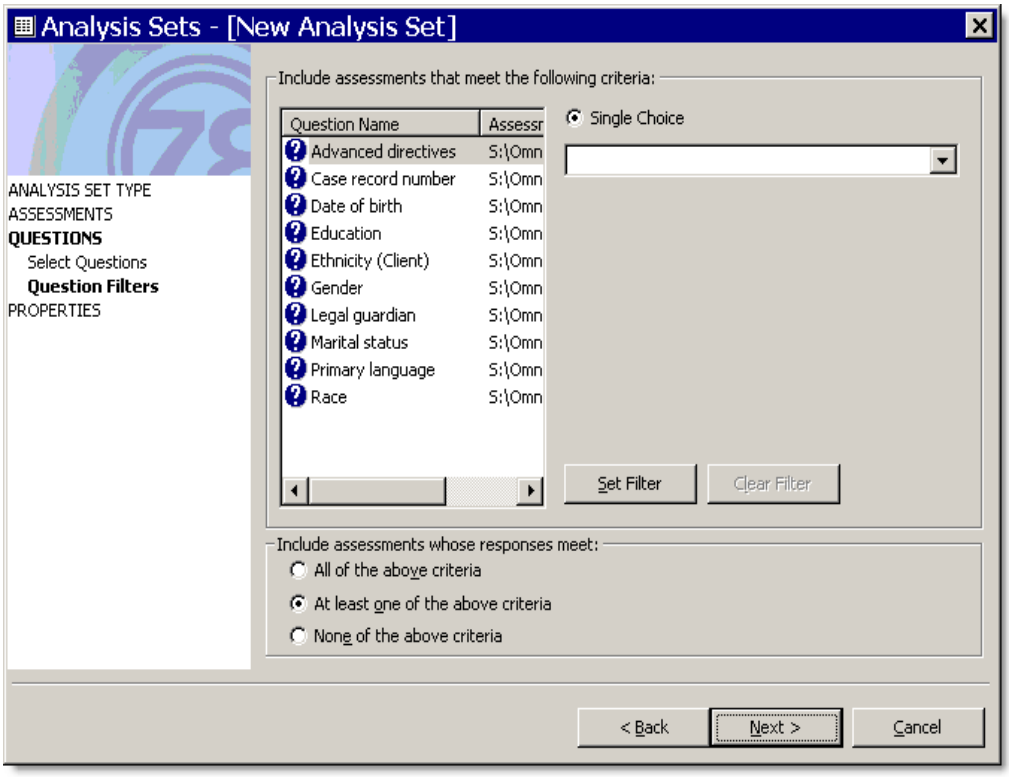
8 Click Next>.

9 Expand the section headings using the plus signs ⊞. Select a couple sections to include.



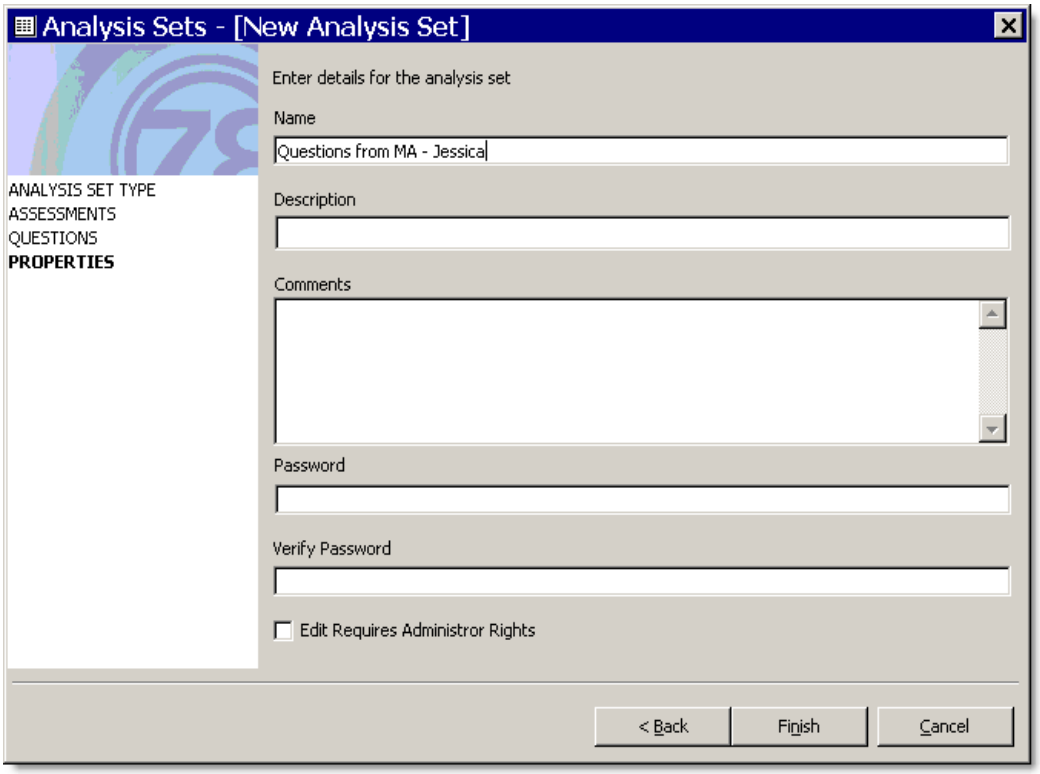
10 Click Next>.

11 *Question Filters* limits the data shown on a report by the fields you've selected. We're going to skip filtering for this exercise.



12 Click Next>.

13 Enter "Questions from MA" with your name as the *Name*.



14 If you select the Edit Requires Administrator Rights box, only users with administrative access can edit the analysis set. Let's leave that unselected for now.

15 Click Finish.

Analysis Set Filters

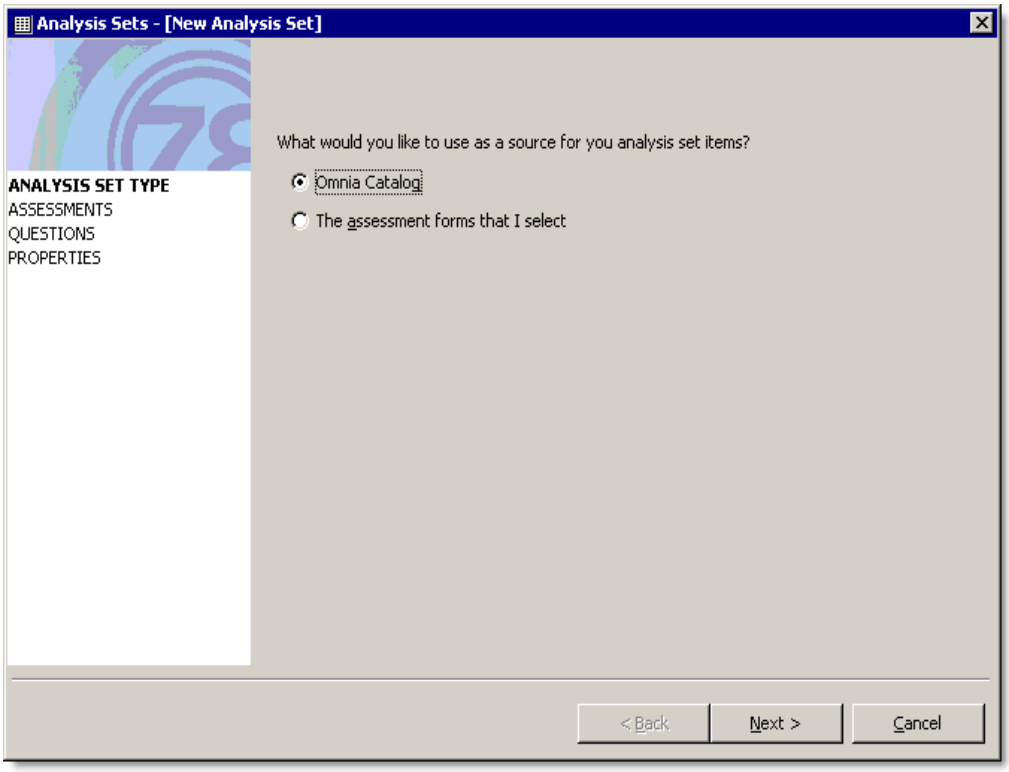
This exercise uses the Omnia Catalog as the source of the Analysis Set items and adds filters.

➢ *To use analysis set filters and the Omnia Catalog*

1 Click New .

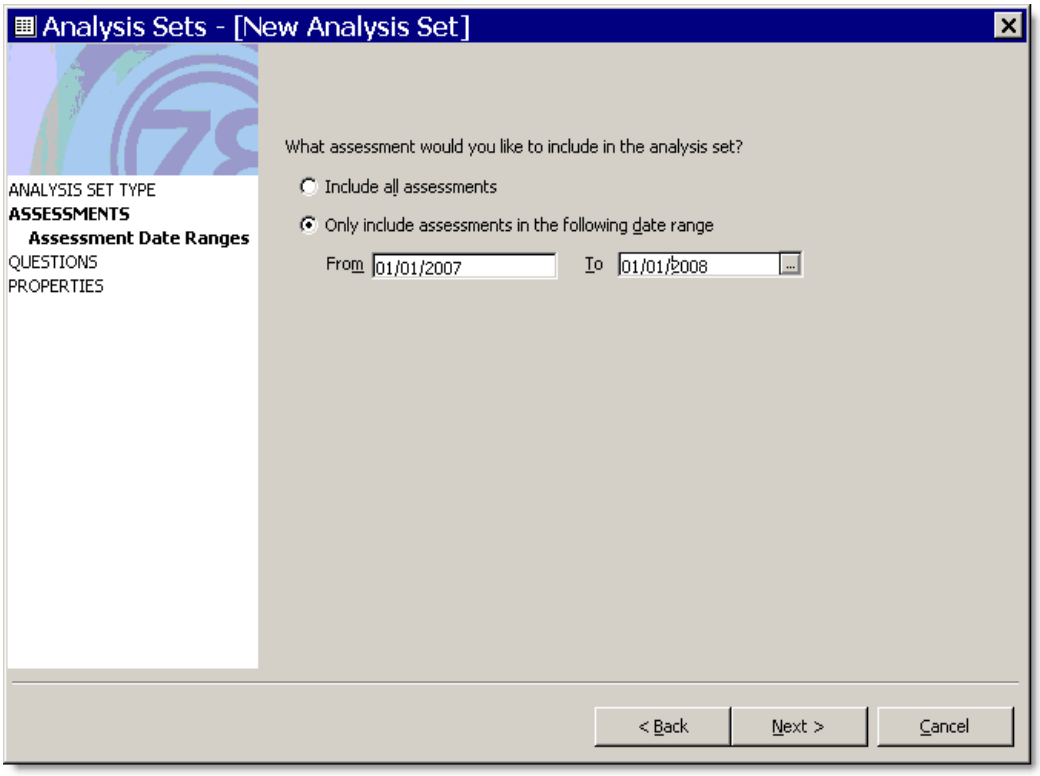
2 Select Omnia Catalog.

Remember that using the Omnia Catalog as the source selects data for all matching questions, regardless of the form used to enter the information.



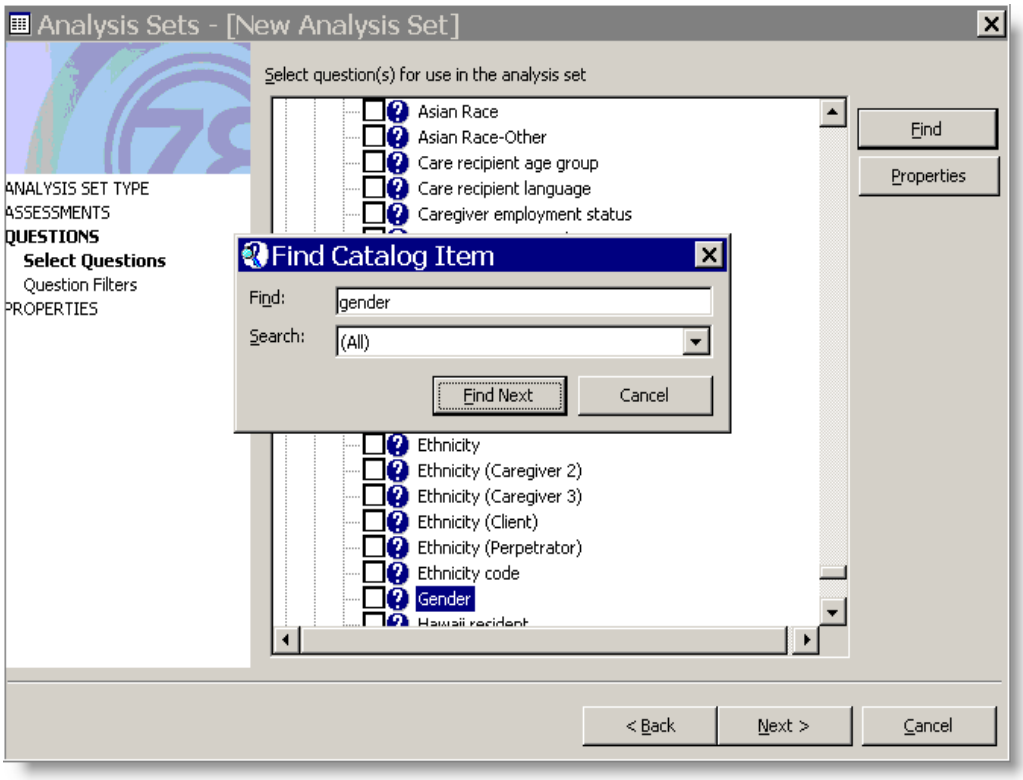
3 Click Next>.

4 Select Only include assessments in the following date range. Enter "01/01/2007" in *From* and "01/01/2008" in *To*. Omnia Analyzer only includes assessments on the report with an *Assessment Session Date* that fall within these dates.



5 Click Next>.

6 Click Find. Enter "Gender" in *Find*. Click Find Next.



7 Search for the "Gender" question under the *General Demographic* section. You'll need to click Find Next a few times to have Omnia Analyzer highlight the correct instance.

8 Once Omnia Analyzer finds the correct question, click Cancel to remove *Find Catalog* Item.

9 Check *Gender*.

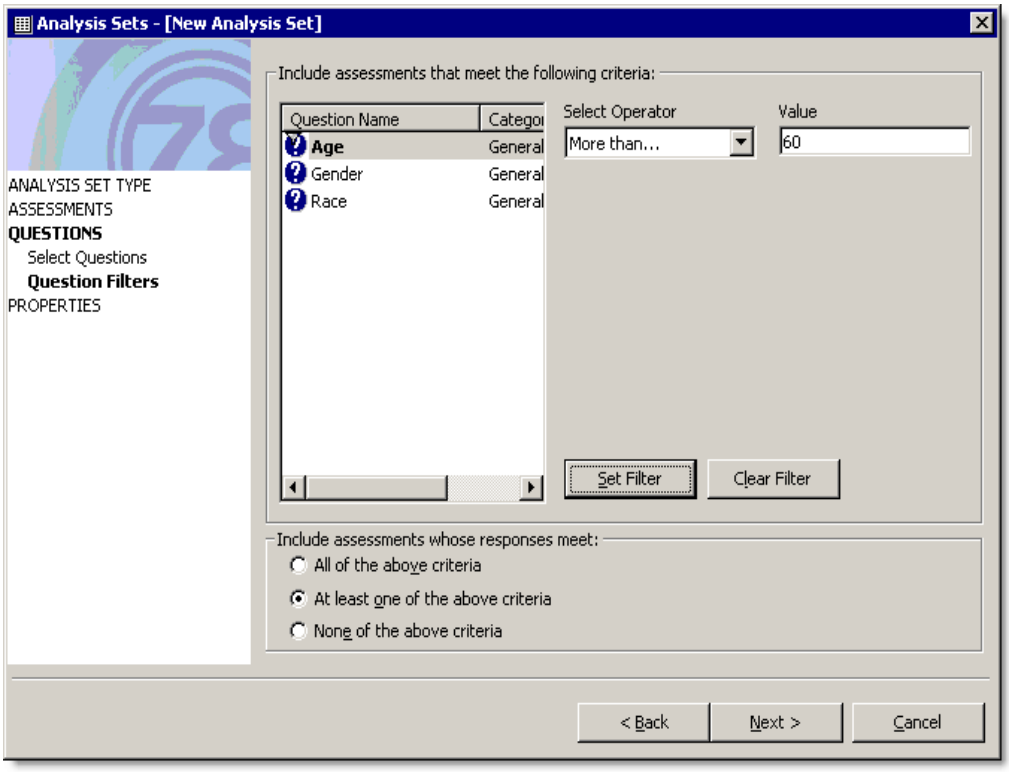
10 Check *Age*.

11 Select *Race/ethncity*.

12 Click Next>.

13 *Question Filters* limit the type of data that an analysis set returns. Let's add two filters to this analysis set.

14 Highlight Age.

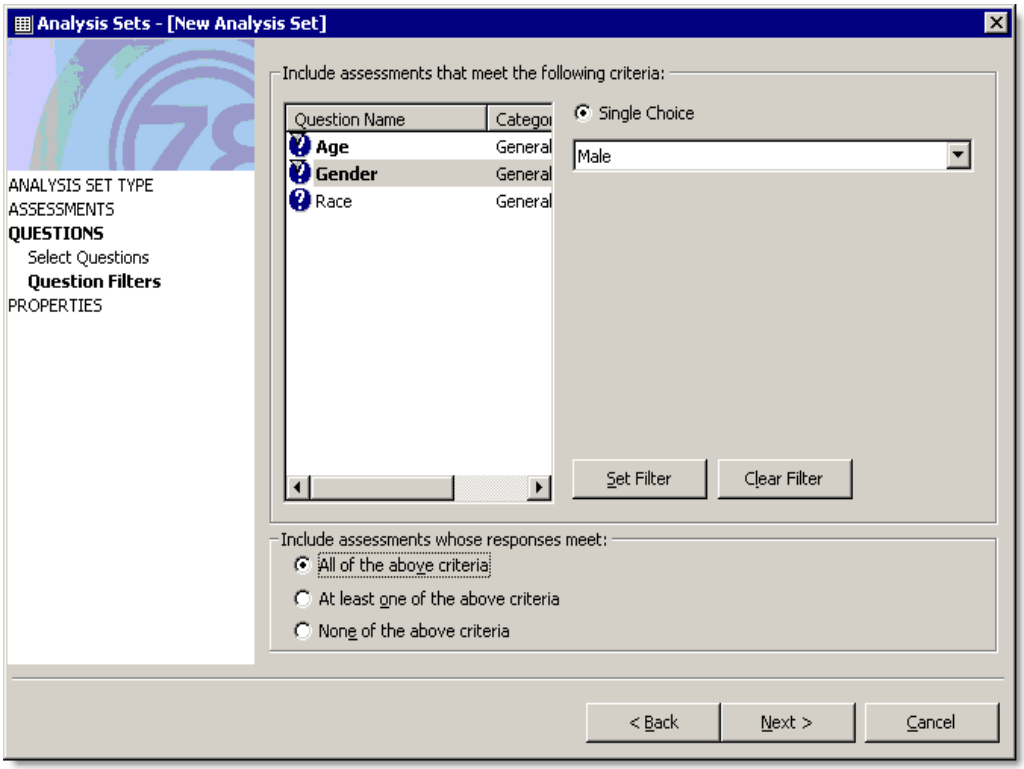


15 Select More than... in the list under *Select Operator*.

16 Enter "60" in *Value*.

17 Click Set Filter.

18 Highlight Gender.



19 Select Male under *Single Choice*.

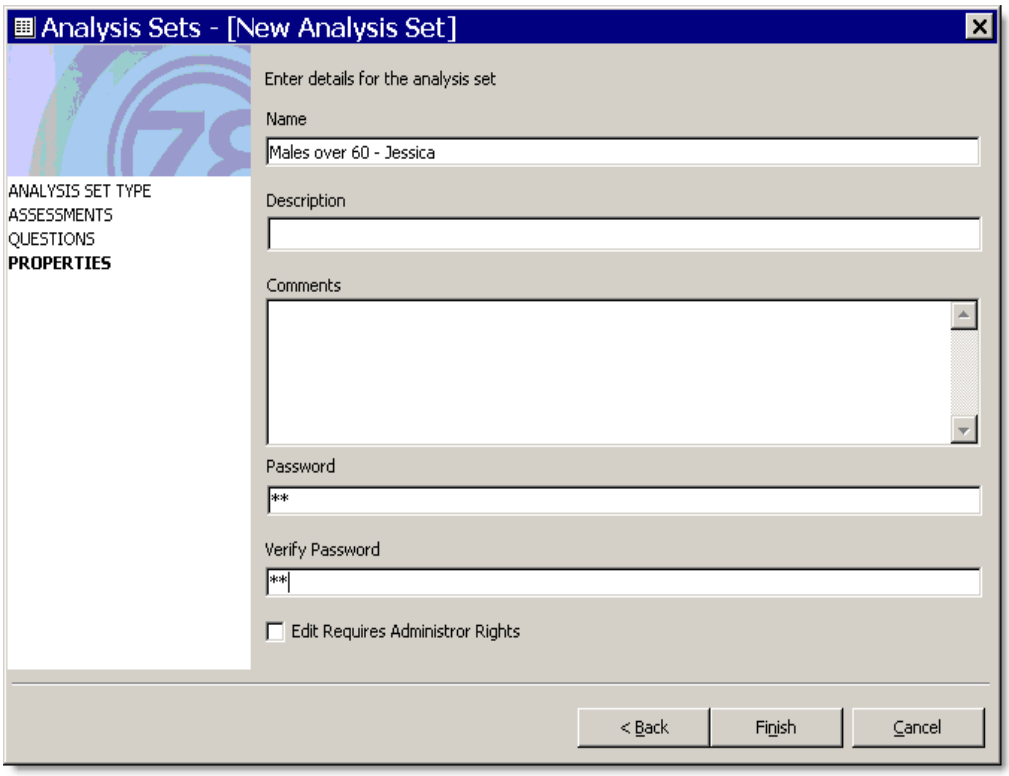
20 Click Set Filter.

21 Select All of the above criteria in the lower box.

22 Click Next>.

23 Enter "Males Over 60" with your name as the *Name*.

Omnia Administrators can reset forgotten passwords.



24 Enter "Me" in *Password* and in *Verify Password*.

25 If you select the Edit Requires Administrator Rights box, only users with administrative access can edit the analysis set filters. Let's leave that unselected for now.

26 Click Finish.

Analysis Set Practice

- Edit the "Males Over 60" with your name analysis set. (Highlight and click Edit.)
- Clear the Age filter. (Highlight Age and click Clear Filter.)
- Create a new filter to capture all those over age 62.
- Change the name of the analysis set to "Males Over 62" with your name.
- Advanced: create an analysis set for those who do not speak English as their Primary Language. (Find the Primary Language question, set the filter to "English", and select None of the above criteria.)

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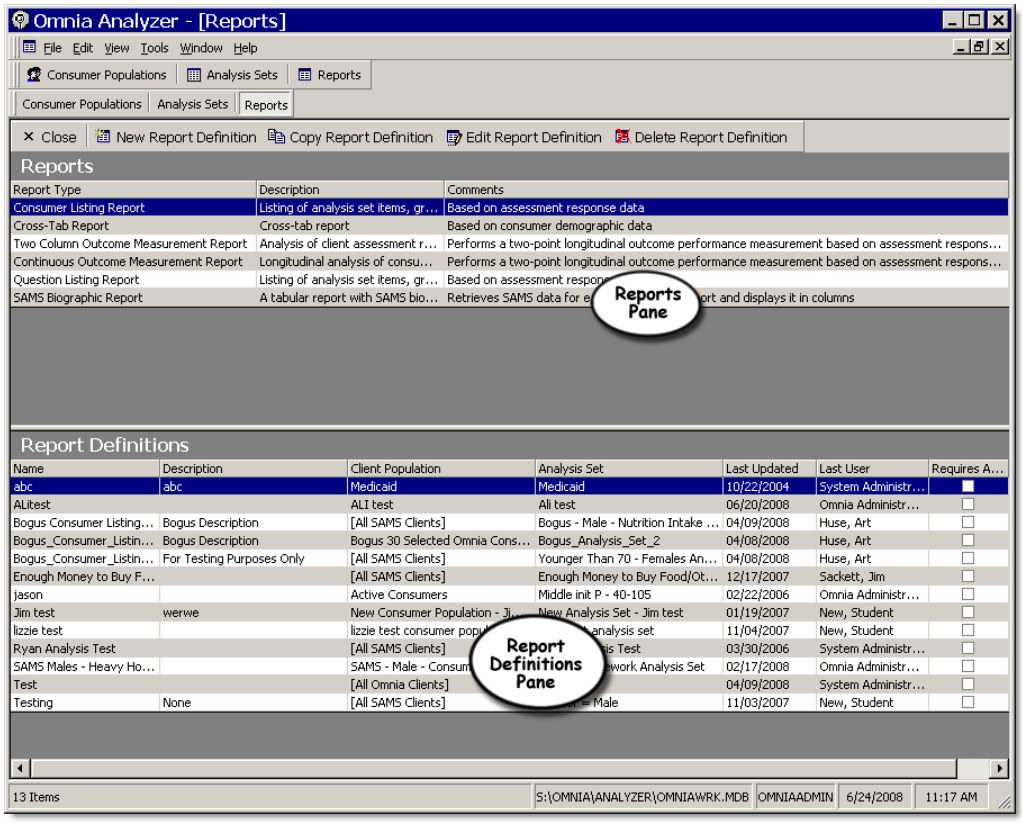
Report Creation

Omnia Analyzer uses a process similar to SAMS to create and generate *Reports*. Omnia Analyzer has six different *Reports* used to create *Report Definitions*. Customize the *Report Definitions* to easily re-generate the same report as required.



Omnia Analyzer divides the *Reports* screen into the *Reports* and *Report Definitions* panes. As in SAMS, you'll highlight a report in the upper *Reports* pane to start creating a report. Double-click or use the New Report Definition button on the toolbar to create a definition you can customize.

Using Consumer Populations and Analysis Sets in Reports

Omnia Analyzer combines Consumer Populations and Analysis Sets using one of the five types of reports discussed below to generate a report. Consumer Populations select the group of consumers whose assessments will be used for the report. Analysis Sets specify the assessment questions to appear on the report and any additional data filters. The type of report controls the report layout and display of data.

Reports using SAMS based *Consumer Populations* or service items generally run slower than those limited to consumers found in the Omnia Repository. Extensive filtering of your Analysis Set or a large database also slows report generation.

Types of Reports

- Consumer Listing Report - groups assessment questions in the analysis set by consumer.
- Cross-Tab Reports - supplies counts and other numeric information by comparing one set of fields against another for a given consumer population.
- Two Column Outcome Measurement Report - displays assessment response changes against service deliveries using two dates for a consumer population and analysis set.
- Continuous Outcome Measurement Report - shows how assessment responses have changed in a date range for a consumer population.
- Question Listing Report - displays responses, response counts, and summaries grouped by assessment question.
- SAMS Biographic Report - a tabular report with SAMS biographic information and assessment data.

Report Security

You can enter a *Password* for each report definition. The password limits who can edit and run the report. Omnia Administrators can reset forgotten passwords.

Consumer Listing Report

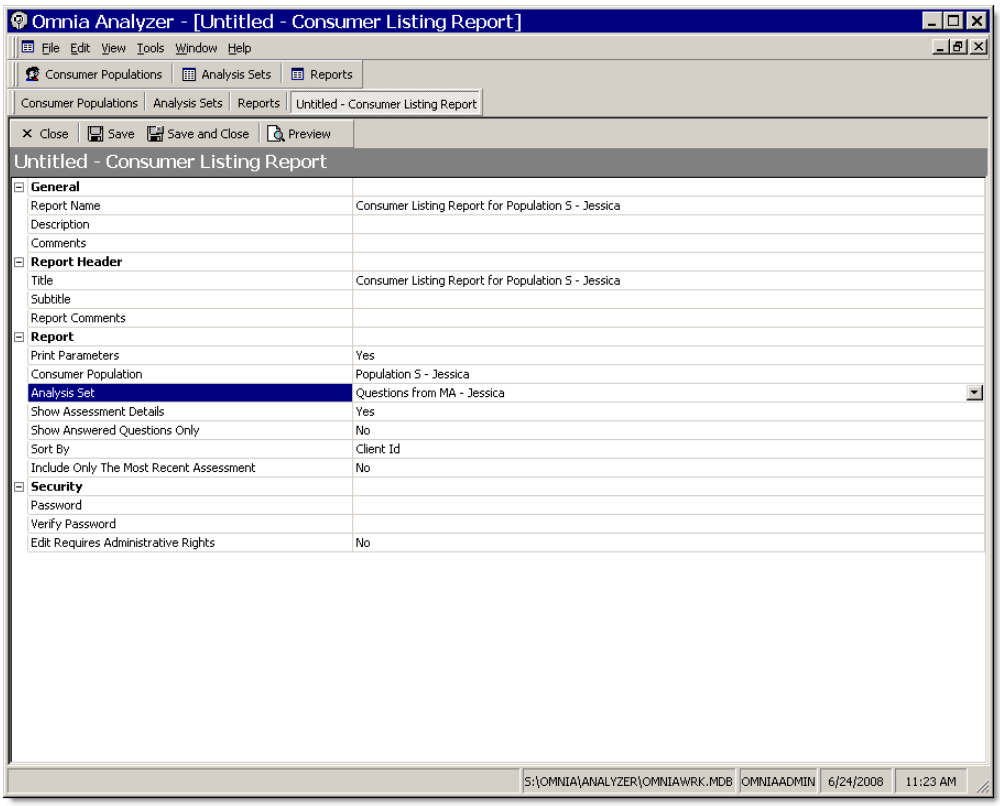
The *Consumer Listing Report* lists the fields of an Analysis Set for each consumer in a Consumer Population. The report limits the data by any filters in the Analysis Set.

Consumer Listing Report Options

Use *Print Parameters* to control printing the *Consumer Population*, *Analysis Set*, and *Sort By* report selections. *Show Assessment Details* displays or removes Analysis Set fields. *Show Answered Questions Only* can prevent assessment questions without responses from appearing on the report.

➢ *To create a consumer listing report*

1. Click Reports .
2. Highlight *Consumer Listing Report* in the upper *Reports* pane.
3. Click New Report Definition .
4. Enter the information below. Use your Population A for the *Consumer Population* and Questions from MA CDS as the *Analysis Set*. Enter "Consumer Listing for Population A" with your name for the *Report Name* and *Title*.



Click Print at anytime to send the report to the printer. Use Page Setup to change the layout or printer.

5 Click **Preview** .

6 Omnia Analyzer displays the report in a pane on the right.

7 Click **Save and Close** when you are finished with the report.

Question Listing Report

A *Question Listing Report* lists analysis set fields grouped by assessment question. By default, Omnia Analyzer displays the responses selected plus *Response* and *Cross-Tab Summaries* (see example in this section). The response summary shows the *Count* and *Percentage* of responses for each question. The *Cross-Tab Summary* lists the number of different responses for each consumer for that question.

Question Listing Report Options

As with the Consumer Listing Report, *Print Parameters* controls the display of the *Report Comments*, *Consumer Population*, *Analysis Set*, and *Sort By* options. In addition, you can choose to show *Assessment Details*, *Response Summary*, or the *Cross-Tab Summary*.

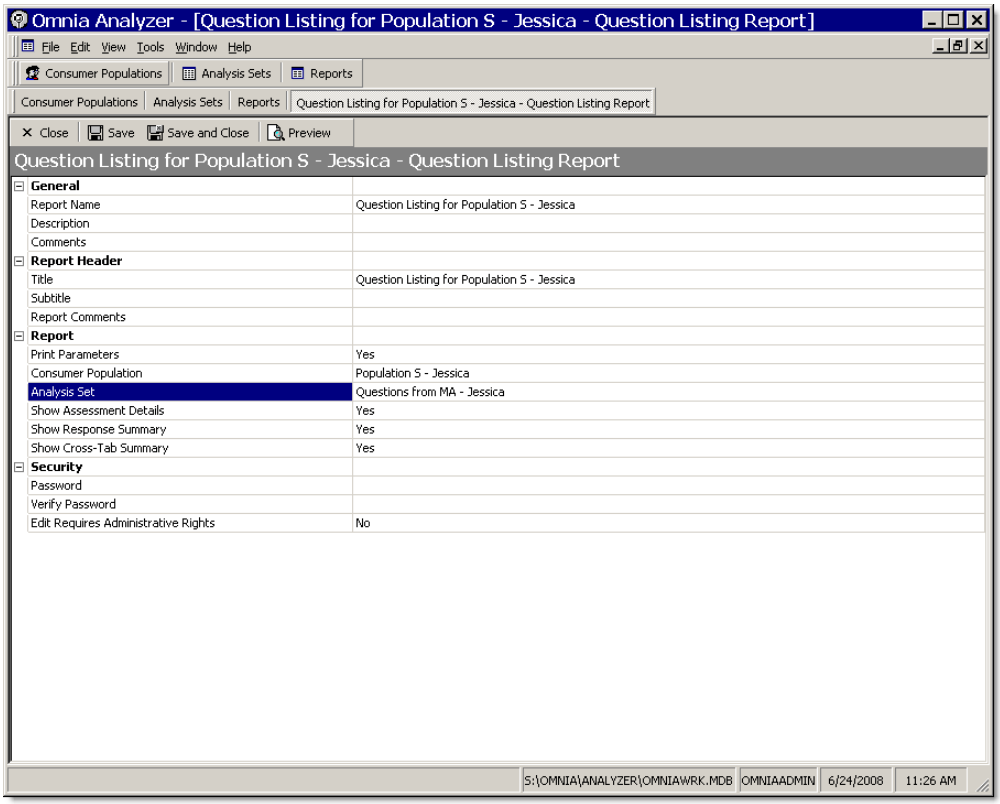
Let's create a question listing report using the same Consumer Population and Analysis Set we used earlier when creating the Consumer Listing Report.

➢ *To create a question listing report*

1 Highlight Question Listing Report in the upper *Reports* pane.

2 Click New Report Definition .

3 Enter the information below. Use your Population A for the *Consumer Population* and Questions from MA as the *Analysis Set*. Enter "Question Listing for Population A" with your name for the *Report Name* and *Title*.



4 Click Preview .

5 Omnia Analyzer displays the report on the right.

6 Select No in *Show Assessment Details* in the left pane.

7 Click Refresh to see the new report.

8 Select No in *Show Cross-Tab Summary* in the left pane.

9 Click Refresh to see the new report.

10 Click Save and Close when you are finished with the report.

Cross-Tab Reports

Cross-Tab Reports count or perform other numeric calculations on data and then display the resulting information in rows and columns to form a table. A cross-tab report requires selecting a Consumer Population and fields for a *Row* and *Column*. Analysis Sets are not used for cross-tab reports.

The *Row* and *Column* fields select the data that Omnia Analyzer uses to create the rows and columns of the table. Selecting a *Summary* field and *Summary Operation* tells Omnia Analyzer what should comprise the cells of the table. For instance, you may want a count *(Summary Operation*) of Age and Gender (row and column) by Residential Town *(Summary* field.)

For the *Row*, *Column*, and *Summary* fields, you can select from *Consumer (Client) ID*, *Age*, *Race*, *Gender*, *ADL Count*, *IADL Count*, *Lives Alone Status*, *In Poverty Status*, *Is Rural Status*, *High Nutritional Risk Status*, *Agency*, *Provider*, and *Residential County* and *Town*. Select *Count* in *Summary Operation* for any type of field or *Sum*, *Average*, *Minimum* or *Maximum* for number based fields.

Cross Tab Report Options

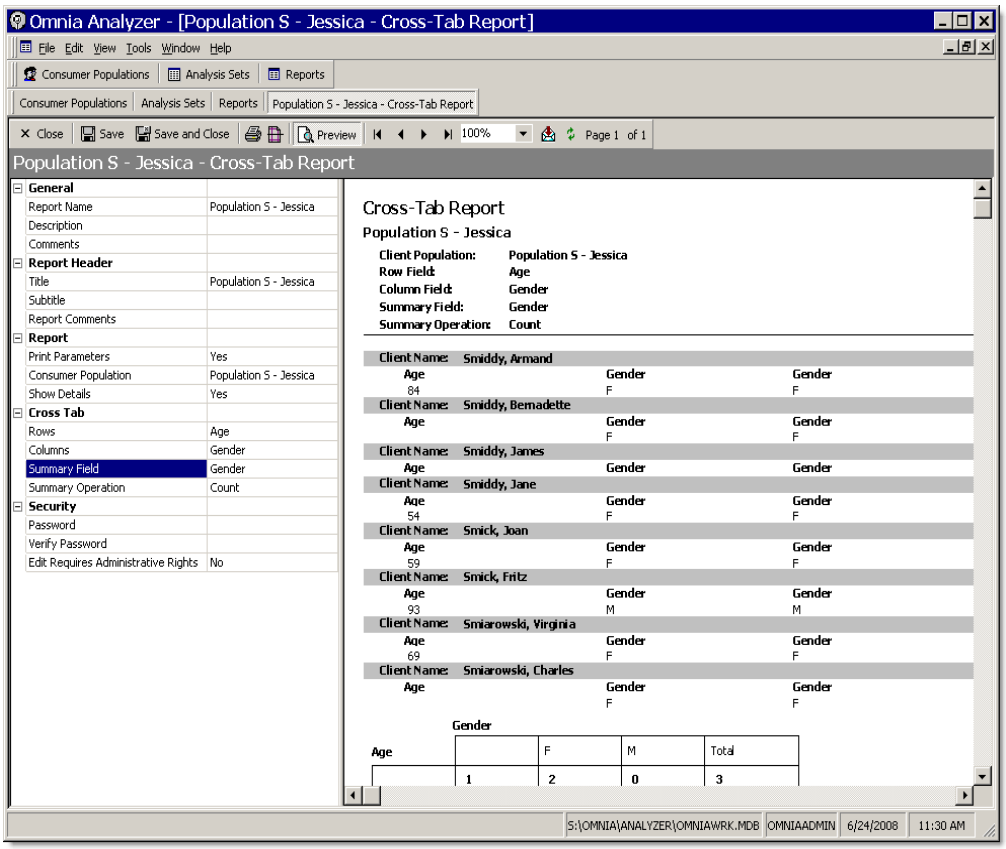
Setting *Print Parameters* to No prevents Omnia Analyzer from printing the *Consumer Population*, *Row*, *Column*, *Summary*, and *Summary Operation* fields. *Show Details* controls the printout of the data used to create the Cross-Tab report.

➢ *To create a cross-tab report*

1 Highlight Cross-Tab Report in the upper *Reports* pane.

2 Click New Report Definition .

3 Enter the information below. Use your Population A for the *Consumer Population*. Enter "Population A" with your name as the *Report Name* and *Title*.



4 Click Preview .

5 Omnia Analyzer displays the report on the right.

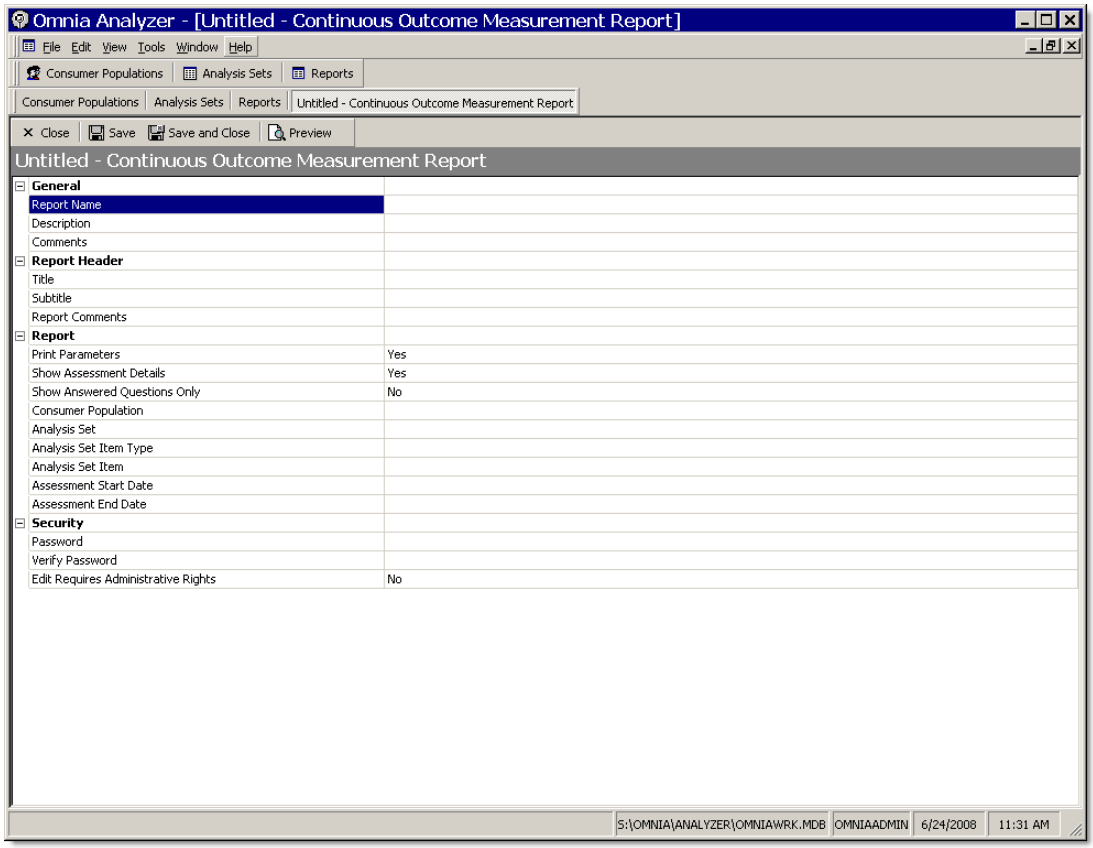
6 Click Save and Close when you are finished with the report.

Outcome Measurement Reports

Outcome Measurement Reports track changes in assessment responses over time. Omnia Analyzer has two outcome measurement reports, *Two Column Outcome Measurement* and *Continuous Outcome Measurement.*

The *Two Column Outcome Measurement Report* tracks changes in assessment data against service deliveries for two periods in time. For example, you can use the two column outcome report to review the impact of service deliveries on IADLs. You need to select a *Consumer Population*, *Analysis Set*, *Analysis Set Item Type*, *Analysis Set Item, Consumer Services Received,* and two sets of *Start* and *End Dates.*

The *Continuous Outcome Measurement* analyzes changes in assessment data in one period of time. Select a *Consumer Population*, *Analysis Set*, *Analysis Set Item Type*, *Analysis Set Item,* and *Start* and *End Date*.



Running Reports

The process of generating an existing report is similar to that of creating or changing a report.

➢ *To print an existing report*

1. Highlight Consumer Listing Report in the upper *Reports* pane.
2. Highlight your Consumer Listing for Population A.
3. Click Edit Report Definition .
4. Make any changes to report options as needed.
5. Click Preview .
6. Click the Printer Icon .
7. To prevent printing during this training session, click Cancel. Ordinarily, you'd click OK to print.
8. Click Close or Save and Close .

Report Practice

- Create a consumer listing report using your Population S and Males Over 60 Analysis Set.
- Preview the report.
- Save and close.
- Create a question listing report using the same Consumer Population and Analysis Set.
- Preview the report.
- Save and close.
- Change your Population S cross tab. (Highlight and click Edit Report Definition .)
- Change the Rows to Race.
- Preview the report.
- Save and close.

NOTES:_____

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Thanks!

We hope that you have enjoyed learning about Omnia Analyzer. If you have any questions, please don't hesitate to ask.

As you begin working in Omnia Analyzer, remember that you can access additional information from the Help menu or by pressing F1.

Thanks for attending!

Glossary of Terms

A

Activities

Meetings, phone calls, or other similar events with a consumer.

Agency

An organization contracted by a state or other government body to oversee/supervise the care of consumers within an area. Agencies can contract with service providers or act directly as the service provider.

Allocation Type

A service plan represents a planned allocation of one or more services a consumer should receive. The allocation type dictates the frequency of the planned service. SAMS offers 'Monthly,' 'Care Plan,' and 'Duration Specified,' and 'Weekly.'

C

Care Enrollment

The association of a consumer with a care program. A care enrollment record tracks status and key dates. All services are planned, ordered, and provided to a consumer under a care enrollment. Users can enroll consumers into multiple care programs.

Care Plan

Section of a consumer record that records care management activities. Users associate a care plan with a care enrollment. Each care plan includes a service plan, goals, journal entries, and a planning worksheet. Care plans have start and end dates that typically coincide with a consumer's eligibility determination date and required re-assessment date.

Care Program

A unique combination of a level of care and service program. A care program may have the same name as the service program, depending on the setup of the organization.

Care Recipient

A consumer who receives services from another consumer.

Caregiver

A consumer who provides services to another consumer.

Consumer Group

A collection of several consumers treated as one consumer. Members of a consumer group usually have something in common, such as attendance at an event or the use of a facility. Individual consumer information such as *Name* or *Social Security Number* is not known.

Contract

An agreement between a single *Agency* and *Provider* over a fiscal period for the delivery of services to consumers. SAMS contracts store fund source (fund identifiers) and unit rates.

I

Invoice

A billing for services delivered to consumers. SAMS can generate invoices for *Consumers*, *Third Parties (Insurance)*, and *Agencies*.

L

Ledger Item

Called an *Invoice* by the EOEA. A method for *Agencies* to report back to the *State Unit* or other government body any expenses incurred by cost center and expenses category against a budget.

Level of Care

A top-level classification defining the type of care required by a consumer. Upon completion of an assessment, a consumer should be assigned a *Level of Care*. Service administration and data entry begins with a *Level of Care* classification.

Location

Address information with additional data such as *Directions, Neighborhood*, and *Municipality*.

P

Progress Notes

Progress notes are entered as SAMS journal entries. SAMS has two areas for creating journal entries: one associated with each care plan and a general consumer journal. Which area you use to enter progress notes depends on agency policy, the relevancy to the care plan, and the sensitivity of the data.

Provider

Also see *Agency*. A vendor or subcontractor in EOEA terminology. An individual or organization providing services to consumers under the direction of one or more agencies.

R

Repository

Omnia System file that stores SAMS and Omnia Interviewer assessments. The Repository also stores Omnia consumers.

Roster

Stored filters used to generate lists of consumers. Users can quickly enter service delivery data using the consumer lists.

Route

A list of consumers, usually with one or more common attributes, that users can custom sort.

S

SAMS

Social Assistance Management System - consumer/client-based software that tracks services.

Service Plan

Found within a care plan, service plans identify one or more services required to meet the needs of the consumer. Services can be provided by informal supports, third parties, or providers who work directly with the agency. Users can enter frequencies and optional caps with each service.

Service Programs

A group of services that can be delivered to a consumer, based on eligibility requirements. Also see *Care Program*.

SIMS

Senior Information Management System

Sub-provider

Individual or organization that delivers services directly to the consumer under a *Provide*r.

Subservice

A further classification of services. For example, the service "Home Delivered Meals" could be associated with "Chinese" or "Kosher" subservices.

V

Vendor

An individual or organization providing services to consumers under the direction of one or more agencies. SAMS calls vendors *Providers*.