

OMS Quick Start Guide

1. Open the documents attached to your OMS Start-Up Email and save them on your computer for easy future reference or visit <http://nationalchildrensalliance.org/members/oms-documents> for copies of all current documents (NCA Members Only Website - requires login).
2. Preview the online versions of the OMS surveys using your custom links listed on your OMS Start-Up Email.
3. Attend or watch a recording of the Part One training webinar. Reference the written materials as needed (the OMS Administrative Guide and any supplemental guides) for further information and instructions for specific features. **There is no need to read all the materials in one sitting!** Just skip to the sections that are relevant to your stage in the process.
4. **Optional: If you are happy with the appearance of the surveys and you do not need to add any extra items for your center, you can skip this step and get started immediately!** If you need to make edits to custom features of your center's surveys (i.e. your center's logo at the top of each survey, your center's name or contact information, or if you need to add more items to your surveys, such as for specific funders) contact OMScordinator@nca-online.org and we will add them for you! Existing items cannot be reworded or removed from the surveys, as this would undermine the national reporting process and statistical integrity of the surveys. However, additional items may be added to the beginning (background/demographic questions) or end of the surveys (all other questions).
5. Decide what method you will use to collect surveys, purchase any supplies/devices (i.e. a tablet for caregivers to fill out surveys), and **start collecting surveys!** If needed, you can start with one survey type and move to the other types at a later point. Keep in mind that caregivers do not need to complete the Initial Survey to be eligible to complete the Follow-Up Survey – the two surveys are both anonymous and not connected for individual participants. For more advanced tracking, we recommend adding fields for the Initial Survey and the Follow-Up Survey to your current case tracking system. This allows you to record if each survey was offered to the caregiver and then either declined or completed. This is not a requirement and you do not need to report this information to NCA, but it may help your center stay on track with collecting the OMS Surveys from caregivers.
 - a. **How will you collect the Initial Visit Caregiver Survey?** We recommend using a computer/tablet on-site, but you can use paper surveys, send the caregiver an email to fill out the survey at home after their visit, or use a combination of methods. If you are using a computer/tablet on-site, add the Initial Visit Caregiver Survey link as a bookmark/favorite on the device for easy access (do a Google search for “how to add a bookmark on [your device/web browser]” if you are not sure how to do this). A staff member should open the survey for the caregiver and then give the caregiver some

space to complete it, but still be nearby enough to answer questions. As soon as the caregiver hits “Submit” at the end of the survey, they should return the tablet to the staff member and the staff member should inform them about the Follow-Up Survey (see below) and ask how they would like to receive it.

- b. When and how will you collect the Caregiver Follow-Up Survey? We recommend collecting this 2 months after the Initial Visit, but the timing is flexible. At the Initial Visit, tell the caregiver to expect the Follow-Up Survey and ask them how they would prefer to complete it. If the caregiver returns to the center for follow-up services in this timeframe (i.e. for counseling, etc.), they can take the survey on paper or a computer/tablet while they are at the center. However, many caregivers may not return to the center, so we recommend collecting every caregiver’s email address and/or phone number (usually both, just in case) and then either send the email invitation or conduct the survey over the phone at the agreed-upon time (guides/scripts are available). The OMS Follow-Up Survey can be integrated into the follow-up calls you may already make, but will not replace any other follow-up procedures your center currently uses (unless you already use another survey – in which case please contact us to find out how to “merge” your survey with the OMS survey). Volunteers and interns can conduct the surveys over the phone, if needed and available, as the surveys do not contain any case-specific information or sensitive topics.
 - c. How will you collect the Multidisciplinary Team (MDT) Survey? We recommend sending the survey by email (a template/sample script is available) and including a specific deadline for the team to complete the survey. The survey should ideally be given once every 6 months and results should be discussed with the MDT members. If you prefer, you can give the survey on paper at a team meeting, but you will need to enter the responses into the online system as soon as possible for tracking purposes.
6. Once you have collected a few surveys, you should attend/watch a recording of the Part Two webinar to learn how to create reports and share results with others.

If you have any questions or run into any barriers to participation in OMS at your center, please contact NCA’s OMS Coordinator, Kaitlin Lounsbury, at OMSCoordinator@nca-online.org or (202) 548-009 x211. We offer unlimited technical assistance at no charge to help your center make the best use of OMS!