



# OBHIS Registration & Dashboard Training

Ohio Department of Mental Health & Addiction Services

August 2020

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# Two objectives for this presentation:

1. Understand the **timeline** and how to **request access** to the OBHIS application
2. Understand the **basics of the OBHIS dashboard**



# Timeline through go-live for Board Users, Provider Users and 3<sup>rd</sup> Party Users



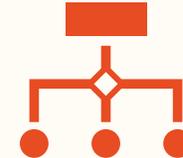
**Today**

Create your OH|ID account  
Request access for the OBHIS  
test site



**15 Sep. 2020**

Request Access to OBHIS  
production



**1 Oct. 2020**

Log into OBHIS production  
and begin using the  
application  
(OHBH is no longer available)

1. Create and OH|ID account
2. Log into iPortal and request access to OBHIS

Today:

How do I  
create my  
OH|ID  
account?

OH|ID

SECURITY DEVELOPERS HELP MANAGE OH|ID ACCOUNT

Secure access to State of Ohio services

OH|ID provides users with a more secure and private experience during online interactions with State of Ohio programs. Users with an OH|ID account can access multiple State applications by only entering their username and password once.

Create OH|ID Account

User ID

FORGOT YOUR USER ID?

Password

FORGOT PASSWORD?

Log In

Get login help

Link to OH|ID registration: <https://ohid.ohio.gov/wps/portal/gov/ohid/>

**Email Verification**

We need to verify your email address. You will be emailed a one-time PIN code at the address you provide below.

Email  Please re-type your email

Email Validation  
We will email you a temporary PIN.

**Create OH|ID Account** Already have an OH|ID? [Log in](#)

**Personal Information**

All fields are required unless labeled (optional).

First Name  Middle Initial (optional)  Last Name

Suffix (optional)

Work Phone Number (optional)  Mobile Number (optional)

Date of Birth  Last 4 digits of SSN (optional)

**Terms and Conditions**

In order to proceed with this request, you must agree to the following terms and conditions.

By clicking "I Agree" and creating an OH|ID Citizen, Business, or Workforce profile you consent to use electronic signatures with the State of Ohio and receive communications in electronic form.

If you use this site, you are responsible for maintaining the confidentiality of your OH|ID account(s) and password(s) and for restricting access to your computer, and you agree to accept responsibility for all activities that occur under your OH|ID account(s) or password(s). The Ohio Department of Administrative Services reserves the right to refuse service, terminate accounts, remove or edit content, or cancel transactions.

I agree to the terms and conditions

---

**Verification Question**

What is the 2nd color in the list pink, house and purple?

**Profile Information**

**Username Guidelines:**

- Must have at least 6 and no more than 64 characters in length
- Username cannot start or end in a special character
- Username cannot contain only numbers
- The following are valid characters that can be used in an OH|ID username:
  - Upper case letters (A-Z)
  - Lower case letter (a-z)
  - Numbers (0-9)
  - Select special characters (. \_ - @ ) Note: No other special characters are permitted

**Pick a User ID**

**Password Guidelines:**

- Must have at least 8 and no more than 30 characters in length
- Must contain 1 character from each of the following categories:
  - Upper case letters (A-Z)
  - Lower case letter (a-z)
  - Numbers (0-9)
  - Special characters (\$!%&-\*\_+=~|{}[]^&quot;~'/?)
- Cannot include your first name, last name, username, or OH|ID
- Example: If your name or username is John Smith, your password cannot contain "John" or "Smith"

**Password**  **Confirm Password**

# 1. Create OH|ID Account



**Email Verification**

We need to verify your email address. You will be emailed a one-time PIN code at the address you provide below.

Email  Please re-type your email

**Email Validation**  
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Email

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We will email you a temporary PIN.

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    - Select special characters (. \_ - @)

Pick a User ID

- Password Guidelines:**
- Must have at least 8 and no more than 64 characters
  - Must contain 1 character from each of the following categories:
    - Upper case letters (A-Z)
    - Lower case letter (a-z)
    - Numbers (0-9)
    - Special characters (SP, %, @, ~, #, !, ~, +, =, <, >, |, &, /, %, ^, ~, ?)
  - Cannot include your first name, last name, username, or OHID
  - Example: If your name or username is John Smith, your password cannot contain "John" or "Smith"

Password  Confirm Password

## Profile Information

### Username Guidelines:

- Must have at least 6 and no more than 64 characters in length
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  - Numbers (0-9)
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- Cannot include your first name, last name, username, or OH|ID
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### Verification Question

What is the 2nd color in the list pink, house and purple?

Cancel

Create Account

### Profile Information

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#### Pick a User ID

#### Password Guidelines:

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- Must contain 1 character from each of the following categories:
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  - Lower case letter (a-z)
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- Cannot include your first name, last name, username, or OH|ID
  - Example: If your name or username is John Smith, your password cannot contain

Password

Confirm Password

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  - Special characters (\$!%,\*~&\_+=<>|[]{}'"/?)"
- Cannot include your first name, last name, username, or OH|ID
- Example: If your name or username is John Smith, your password cannot contain the letters johnsmith

**Password**  **Confirm Password**

to the following terms and conditions.

Business, or Workforce profile you consent to use electronic signatures with the State of Ohio

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y for all activities that occur under your OH|ID account(s) or password(s). The Ohio

right to refuse service, terminate accounts, remove or edit content, or cancel transactions.

ple?

Create Account

Today:

How do I  
request  
access to the  
OBHIS test  
site?

1. Create an OH|ID account
2. Email the OBHIS administrators:  
[OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov)
  - Use the following subject line: **UAT/Test access request**
  - **Include:**
    1. Your name and OBHIS role
    2. Organization name and address
    3. If no one from your organization has registered, you will also need to include your organization Tax ID number



Beginning  
September  
15, 2020:

How do I  
request  
access to  
OBHIS?

Log into iPortal and request access to OBHIS by following a few steps...

The screenshot shows the OH|ID login interface. At the top left is the OH|ID logo. To the right are navigation links: SECURITY, DEVELOPERS, HELP, and MANAGE OH|ID ACCOUNT. In the top right corner, there is a user icon and a search icon. The main content area has a dark blue background with the heading "Secure access to State of Ohio services". Below this heading is a paragraph: "OH|ID provides users with a more secure and private experience during online interactions with State of Ohio programs. Users with an OH|ID account can access multiple State applications by only entering their username and password once." A "Create OH|ID Account" button is centered below the text. On the right side, a white login form is highlighted with a green border. The form contains a "User ID" input field with a "FORGOT YOUR USER ID?" link below it. Below that is a "Password" input field with a "FORGOT PASSWORD?" link and a toggle icon. At the bottom of the form is a "Log In" button with a lock icon and a "Get login help" link.

Log into OH|ID and click on the 'sites & applications tab or the link...

The screenshot displays the OH|ID user interface. At the top left is the OH|ID logo. The top navigation bar includes links for SECURITY, DEVELOPERS, HELP, and MANAGE OH|ID ACCOUNT. A red underline is positioned under the MANAGE OH|ID ACCOUNT link. A notification banner at the top states: "Your browser appears to be out of date. For a better browsing experience, use the latest version of [Google Chrome](#), [Mozilla Firefox](#), [Microsoft Edge](#), or [Safari](#) for Apple devices." Below this is a dark blue navigation bar with tabs for DASHBOARD, SITES & APPLICATIONS (highlighted with a green oval), SECURITY LEVEL, RECENT ACTIVITY, and DEVICES. The main content area shows a "Hello!" greeting with a redacted name. To the right, a section titled "Your favorite OH|ID sites and applications" includes a "VIEW ALL APPS" link. Below this, there are radio buttons for "Security Level" with options "Basic", "Intermediate", and "Advanced" (the "Advanced" option is selected). A text block below the radio buttons reads: "Once you add an OH|ID application to your Favorites, you will see it here. To browse all available sites and applications, select the Sites & Applications tab or [access the catalog here.](#)" The link "access the catalog here." is circled in green. At the bottom left, there is a profile card with a redacted name and an "EDIT NAME" link.



# Search for OhioMHAS Tile

- Click on whichever link you locate first...



**Ohio Department of Mental Health & Addiction Services**

Access to OhioMHAS Web Applications

[Go To Site](#) 



## Ohio Department of Mental Health & Addiction Services

Department of Mental Health and Addiction Services

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Access to OhioMHAS Web Applications

**LAUNCH**   
Ohio Department of Mental Hea...

# Submit request for the OBHIS application...

The screenshot shows the Ohio Mental Health & Addiction Services iPortal dashboard. At the top left is the Ohio logo with 'MENTAL HEALTH & ADDICTION SERVICES' and 'Ohio'. Navigation links for 'Home' and 'Admin' are present. The breadcrumb trail reads 'Dashboard > Mental Health and Addiction Services iPortal'. A green notification bar states 'You have logged in using your OH|ID account!'. A 'Notifications' icon with a '0' badge is visible. Below this is a 'Notifications' section with a yellow background and the text 'There are no notifications at this time.' The main content area features a form titled 'Request Access to Application:' with a dropdown menu containing the text 'Select an application to request access' and a 'Submit Request' button. A blue note box below the form reads: 'Note: if you already have access to the applications below, please do not submit a new request.' At the bottom center is a 'My Applications' link with a group icon.

# You will have to complete some information through the One-Time User Registration:

MUST use the same email address as you did for the OH|ID

## ONE-TIME USER REGISTRATION FOR OBHIS Organization Lookup

Note: Please enter your Email address (the OH|ID you used to register with the State of Ohio).

Email: \*

You successfully requested access to OBHIS .

Here's what to expect next: For security reasons, an administrator must review and approve your request for business days. Upon approval, you will receive a confirmation e-mail.

Prior to approval, you may log into iPortal, but OBHIS may not yet appear on your "My Applications" menu. If a reasonable amount of time, please contact the OhioMHAS help desk at (614) 466-1483 or MHAHelpdesk@mh

Done

Please enter your Employer Identification Number (EIN), also known as the Federal Tax Identification Number (FTID), and click on 'Search' to confirm that your organization is registered with OhioMHAS.

EIN / FTID: \*  Search

Please select your organization below and then click on 'Submit'.

Organization Name:  Submit

Cancel

**Note:** After the request is processed by your Provider Administrator, you will receive an email stating you have been granted access to OBHIS



Wait!

Who is the  
Provider  
Administrator?!?



The person in your organization who assists first-time OBHIS users in setting up their accounts is the Provider Administrator.



The Provider Administrator maintains staff access to the system.



**If you do not know who your Provider Administrator is,** please email OhioMHAS OBHIS administrators:



[OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov)

# OBHIS Tiles

- After receiving an email that you have been granted access to OBHIS, log into the iPortal.
- You will see the OBHIS Application tile.
  - (Board users will NOT see this tile)
- You will also see the OBHIS Reports tile.
  - (3<sup>rd</sup> party users will NOT see this tile)
- Click on the OBHIS Application tile to get to the OBHIS dashboard



The screenshot displays the iPortal dashboard interface. At the top, there is a header with a group icon and the text "My Applications". Below this, there is a large white tile for "OBHIS". The tile features the OBHIS logo (a person with arms raised inside a circle), the text "OBHIS", a user icon and "Provider User", and "Ohio Behavioral Health Information System". At the bottom of the tile, there is a group icon with the number "61" and a "Request Help" button. Below the "OBHIS" tile, there is a header with a list icon and the text "My Reports". Below this, there is another large white tile for "OBHIS Reports". This tile features the same OBHIS logo, the text "OBHIS Reports", a user icon and "Provider User", and "Ohio Behavioral Health Information System". At the bottom of the tile, there is a group icon with the number "61" and a "Request Help" button.

# OBHIS Dashboard Page

The screenshot shows the OBHIS Dashboard Page. At the top, there is a dark red navigation bar containing the Ohio Behavioral Health Information System logo, a 'Home' button, a 'Client' dropdown menu, a 'Batch Upload' dropdown menu, and a 'Documentation' button. A callout bubble labeled 'Navigation Bar' points to this bar. On the right side of the navigation bar, there is a user profile section with the text 'Welcome, Beth.Gersper' and a settings gear icon. A callout bubble labeled 'Your settings' points to the gear icon. Below the navigation bar, the main content area has a white background. It features a 'Notifications' section with a bell icon and the text 'There are no notifications at this time.' A callout bubble labeled 'Notifications' points to this section. Below the notifications, there is a 'Provider' dropdown menu with the text 'Moore Counseling & Mediation Services, Inc, 22639 Euclid Ave, Euclid'. Below the provider menu, there is a list of four items, each with a dropdown arrow: 'Client Records Pending Verification', 'Incomplete Admission Records', 'Incomplete Annual Update Records', and 'Incomplete Discharge Records'. A large, starburst-shaped callout bubble labeled 'Where your work begins!!!' points to this list. A green rectangular box highlights the entire main content area.

**NOTE:** When you receive access to the Production environment/site, you will only see a “Coming Soon” message until the go-live date: October 1, 2020.

# Client Records Pending Verification

Only clients that are in pending verification (the client admission record has not been matched to a claim) for more than 365 days will be displayed.

Client Records Pending Verification							
Action	Created	Last Name	First Name	Identifier Type	Identifier Number	Date of Birth	Status
0 of 0 records							
Incomplete Admission Records							
Incomplete Annual Update Records							
Incomplete Discharge Records							

# Incomplete Admission Records

- Incomplete (Save & Finish Later) records are displayed under this section until they expire.
- The user can use the 'Edit' action to complete the record or the admission record will be deleted after 14 days.
- There must be a completed admission record for a client to be officially entered into OBHIS.

The screenshot displays a web application interface with a sidebar on the left containing three menu items: 'Client Records Pending Verification', 'Incomplete Admission Records', and 'Incomplete Discharge Records'. The 'Incomplete Admission Records' menu item is selected and expanded, showing a table with the following columns: Action, Save & Finish Later Expiration Date, Last Name, First Name, Identifier Number, Provider Client ID Number, and Status. The table is currently empty, displaying '0 of 0 records' in the center.

Action	Save & Finish Later Expiration Date	Last Name	First Name	Identifier Number	Provider Client ID Number	Status
0 of 0 records						

# Incomplete Annual Update Records

- Any incomplete (Save and Finish Later) Annual Update records for Mental Health clients will display in this area.
- The user can use the 'Edit' action to complete the record or the annual update record will be deleted after 14 days.

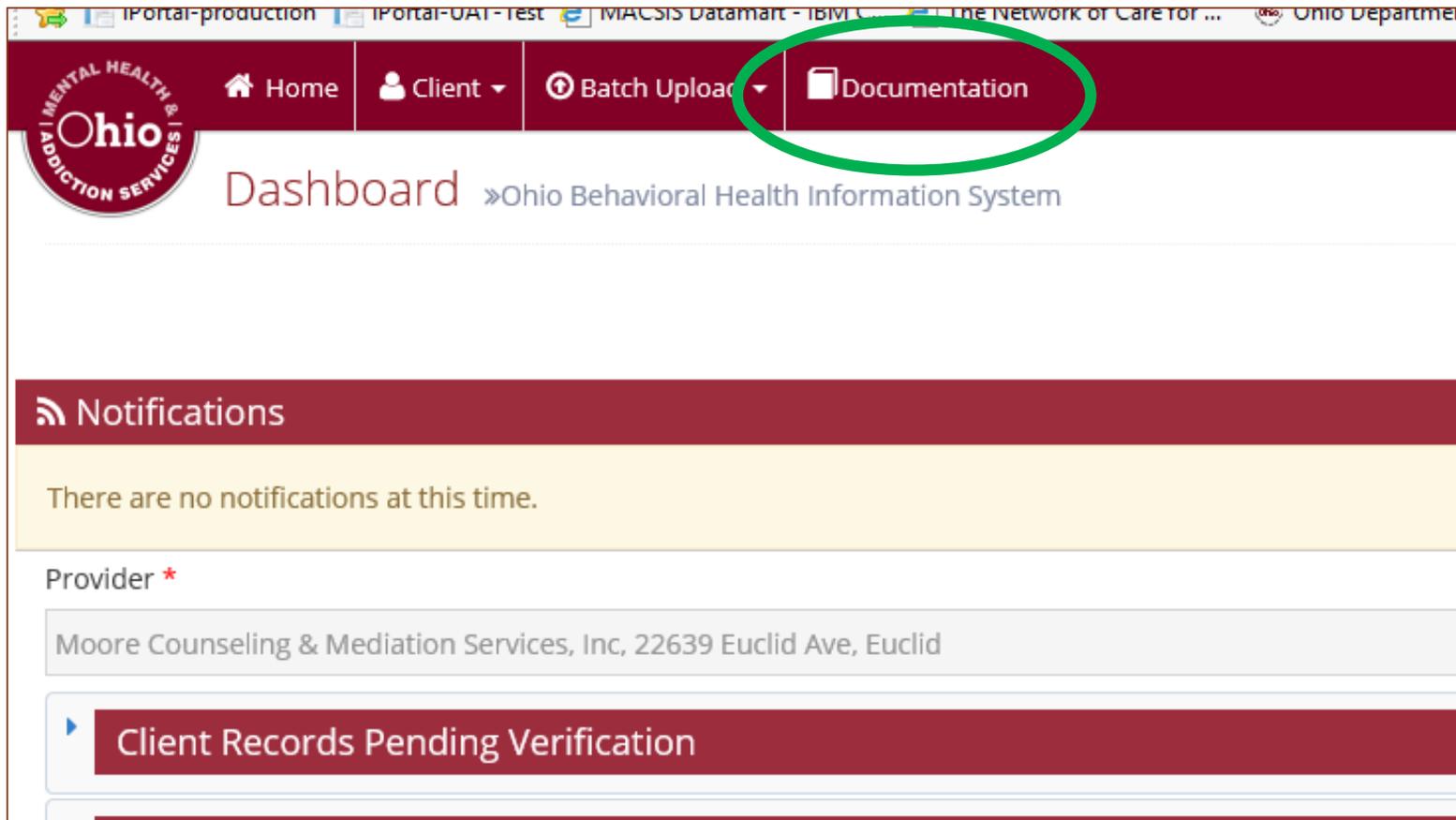
Client Records Pending Verification						
Incomplete Admission Records						
Incomplete Annual Update Records						
Action	Last Modified Date	Last Name	First Name	Identifier Number	Provider Client ID Number	Status
0 of 0 records						
Incomplete Discharge Records						

# Incomplete Discharge Records

- Incomplete discharge records for AOD/SUD clients will display under this section.
- The user can use the 'Edit' action to complete the record or the discharge record will be deleted after 14 days.

▶ Client Records Pending Verification						
▶ Incomplete Admission Records						
▶ Incomplete Annual Update Records						
▼ Incomplete Discharge Records						
Action	Last Modified Date	Last Name	First Name	Identifier Number	Provider Client ID Number	Admission Type
0 of 0 records						

# The Navigation Bar



The screenshot shows a web browser window with several tabs: 'IPortal-production', 'IPortal-DAI-Test', 'MACSIS Datamart - IBM C...', 'The Network of Care for ...', and 'Ohio Departmen...'. The navigation bar is dark red and contains the following elements from left to right: the Ohio Mental Health & Addiction Services logo, a 'Home' link with a house icon, a 'Client' dropdown menu with a person icon, a 'Batch Upload' dropdown menu with a circular arrow icon, and a 'Documentation' link with a document icon. The 'Documentation' link is circled in green. Below the navigation bar, the page title is 'Dashboard » Ohio Behavioral Health Information System'. A 'Notifications' section with a red background and white text states 'There are no notifications at this time.' Below that, a 'Provider \*' section shows a text input field containing 'Moore Counseling & Mediation Services, Inc, 22639 Euclid Ave, Euclid'. At the bottom, a red banner with white text reads 'Client Records Pending Verification'.

# Documentation Tab:

- This is your resource station!
- This tab has PDF's of all the information – in greater detail – that we are going over in these short trainings
- Please check it out to answer questions you may have and if you still have more questions, please contact your Provider Administrator or an OhioMHAS OBHIS Administrator.

- 
- Service Documents
  - Master Guide
  - Business Rules
  - Field Definitions
  - XML Schema Definition for Upload
  - Explanation of XML Schema Definition for Upload
  - XML Examples
    - Admission
      - Create AOD Male
      - Create AOD Female
      - Create MH Male
      - Create MH Female
      - Edit AOD Male Admission
      - Edit AOD Female Admission
      - Edit MH Male Admission
      - Edit MH Female Admission
      - Delete Admission
    - Discharge
      - Add AOD Male Discharge
      - Add AOD Female Discharge
      - Add MH Male Discharge
      - Add MH Female Discharge

# Frequently Asked Questions

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- An FAQ document is updated frequently on the OBHIS website under the “Related Topics” section.

<https://mha.ohio.gov/Health-Professionals/Behavioral-Health-Data-Reporting/OBHIS>

## RELATED TOPICS

 An Overview of OBHIS

 OBHIS FAQ

 Introduction to OBHIS

 Intro to OBHIS Batch Upload with User Interface

 Intro to OBHIS Manual Data Entry with User Interface

 OhioMHAS Help Desk

# This FAQ document is organized by topic:

- General
- Clients
- Ins and Outs of Reporting
- Reports

This document will be updated after trainings are completed.

Additional topics, questions and answers will be added as they come up during these trainings and in email correspondence.

Please do not hesitate to ask questions – they not only help you, but they may help another provider and they help us with communication.

# Q&A from last session: (page 1)

- **When will the site be live?**

- October 1<sup>st</sup>. You will see a “coming soon” message until then.
- You may request access to the test environment (slide 28)

- **What if we never reported in OHBH before?**

- You will need to begin reporting in OBHIS as soon as you are able to do so after October 1<sup>st</sup>.

- **Will we have to enter all existing client data or only new admissions after October 1<sup>st</sup>?**

- If you were already reporting in OHBH, all active clients will be migrated over to the new OBHIS system and you will need to begin entering new admissions after October 1<sup>st</sup>
- If you were not already reporting to OHBH, you will need to enter/upload all active clients and new client admissions after October 1, 2020

# Q&A from last session: (page 2)

- **Can I register now, or do I need to wait until September 15<sup>th</sup>?**
  - You can create an OH|ID account and request access to OBHIS now. Our main push for registration will be the last couple of weeks in September.
- **Can an agency have more than one Provider Administrator?**
  - Yes. An agency needs a minimum of one (1), but can have as many as deemed necessary by their leaders
- **Are the forms final? We don't want to get everything set up in the EHR and then have to make changes.**
  - Yes. The system is as final as we can make it – the only reason we would change it is if SAMHSA or another major agency requests more data.

# What do I do if I have questions?

1. Contact your Provider Administrator

*and/or ...*

2. Contact the OhioMHAS OBHIS Administrator(s)

[OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov)

## **Include the following information:**

- First Name, Last Name
- OBHIS role (e.g. Provider User)
- Your Agency/ Board name
- The issue(s) and/or question(s) you have





# Reports

- Reports are designed to assist in quality and service performance. There are three groups of reports:
  - Record Management Reports
  - Client Status Reports
  - Outcomes and Performance Reports
- You can find the reports on the OBHIS Reports tile.
- You can download these reports and use software, like Excel and SPSS to create charts and graphs
- If you need assistance in using the data, please do not hesitate to contact OhioMHAS OBHIS administrators: [OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov)

*(\*refer to the Reports Presentations for more information)*

# OBHIS OVERVIEW

- There is a summary and a presentation online: <https://mha.ohio.gov/Health-Professionals/Behavioral-Health-Data-Reporting/OBHIS>

## What is OBHIS?

The **Ohio Behavioral Health Information System** (OBHIS) is the department level episode of care information and outcomes reporting system.

## System Features

- User Interface through I-Portal
- Active OHBH Accounts transfer to OBHIS
- Client records verified against MITS, GOSH, SHARES, Heartland, Medicaid Claims in Community Services Data Warehouse
- Schema versioning on Batch Upload
- Standardized Administrative Reports through COGNOS Link

## Who is Required to Report Client Information in OBHIS?

Providers certified or licensed by OhioMHAS to provide behavioral health services are required under ORC 5119.6

- all clients treated for a mental health or substance use disorder, when
- services are covered in whole or part by public funding through
  - Medicaid
  - ADAMH Board
  - OhioMHAS

Slide  
presentation

Video  
presentation

## RELATED TOPICS

 [An Overview of OBHIS](#) ←

 [OBHIS FAQ](#)

 [Introduction to OBHIS](#) ←

 [Intro to OBHIS Batch Upload with User Interface](#)

 [Intro to OBHIS Manual Data Entry with User Interface](#)

 [OhioMHAS Help Desk](#)

# FIELD DEFINITIONS AND FORMS

Online under the 'Records' tab

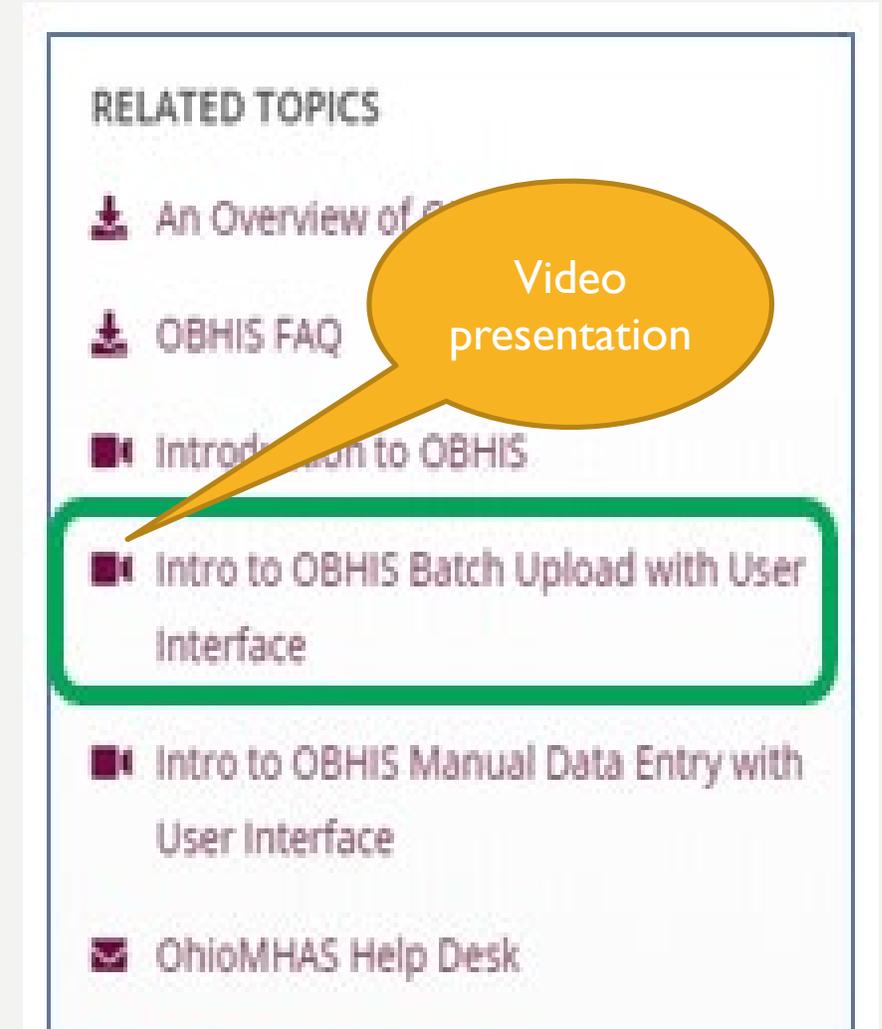
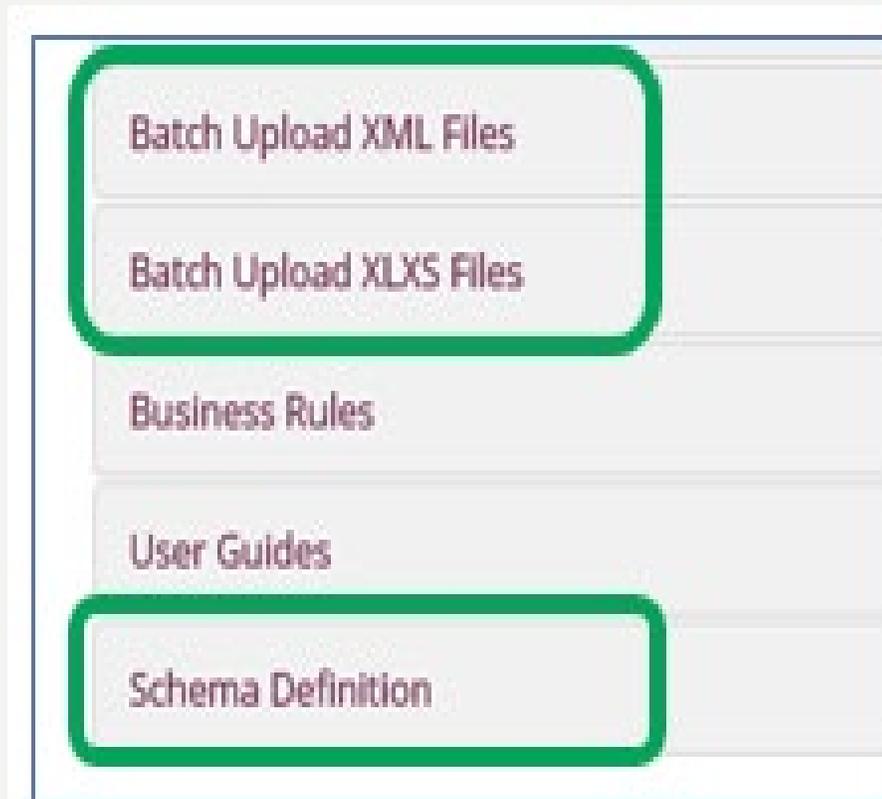


The screenshot shows a software interface with a 'Records' tab selected. Below the tab, there is a list of eight items, each preceded by a purple download icon. The items are:

- OBHIS Records Field Definitions
- OBHIS Implementation Tips for Agencies New to Reporting
- OBHIS Implementation Tips for Agencies Transitioning from OHBH
- Client Record Fields
- Admission Record Fields
- Discharge Record Fields
- Transfer Record Fields
- Annual Update Record Fields

# BATCH UPLOAD REQUIREMENTS

- Online resources for batch upload files (XML, XLXS and schema definition)
- Online presentation under 'Related Topics'



# NAVIGATING THE OBHIS SYSTEM, REGISTRATION & APPROVALS FOR ACCESS

- Online guides under the “User Guides” tab
- Upcoming trainings; will be posted online by the end of September

## User Guides

 OBHIS User Guide

### External User Registration

 Master Guide

 OhioMHAS Business Admin/Provider Admin to assign role

 The users: provider admin, provider user, third party, and board, user guide to request access

# Questions



## Contact OhioMHAS OBHIS Administrators

[OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov)

### What to do now and timing of go-live:

- Familiarize yourself with the application by attending and/or reviewing trainings online
- Set up your OH|ID
- Request access to the OBHIS test site
- Play around on the OBHIS test site
- September 15 – October 1: gain access to OBHIS production (it will only say 'coming soon' until October 1<sup>st</sup> when data is migrated over)
- October 1<sup>st</sup>: begin working on the OBHIS production site (you should be able to begin entering data; **OHBH will no longer be available**)