MASTER USER GUIDE

Ohio Behavioral Health Information System (OBHIS)

April 2019

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Overview

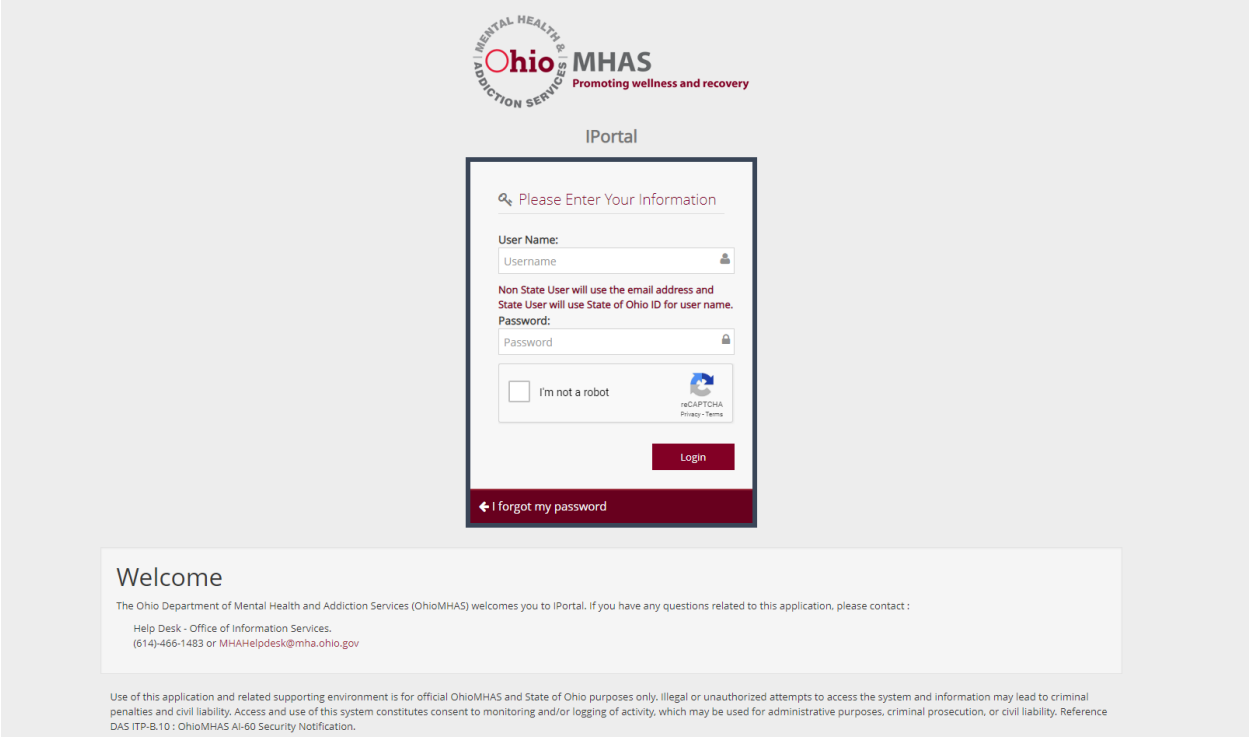
The Ohio Behavioral Health Information System (OBHIS) is used to capture Mental Health and Substance Abuse statistical and outcomes data required by ORC 5119.61 and OAC 5122-28-04.

Who is this document for?

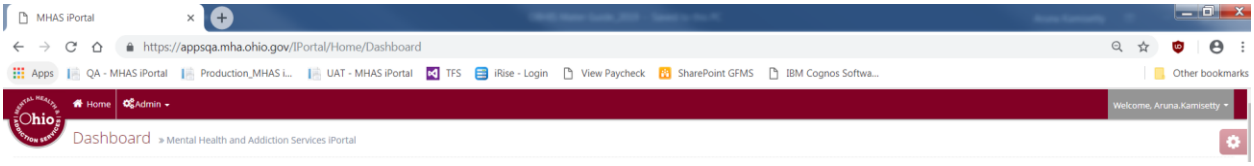
This document is intended as a **"Master" (Complete)** User Guide which provides the entire view and functionality of OBHIS.

iPortal Login

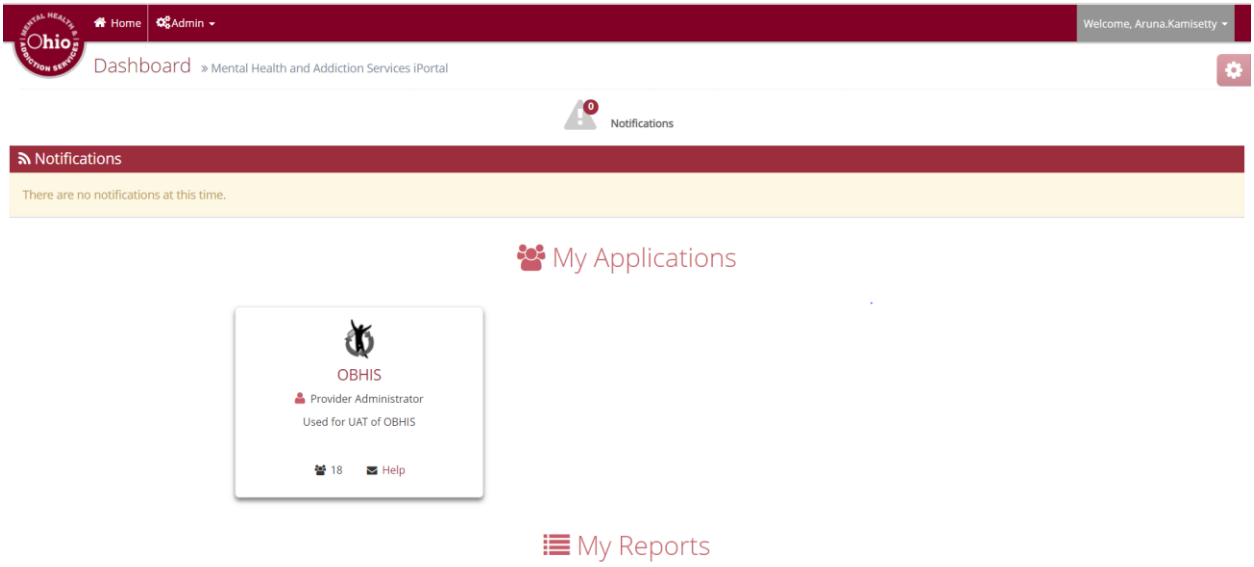
1. Open your browser and Go to https://appsuat.mha.ohio.gov/IPortal The iPortal login page will be displayed.
2. Enter your login credentials and click on Login button. The user will be navigating to the I-Portal Dashboard.



3. Internal Users – Enter your OAKS ID and password, click "I'm not a robot" to complete the Captcha verification, then click "Login".
4. External Users – Enter your email address and password, click "I'm not a robot" to complete Captcha verification, then click "Login".
5. The iPortal Dashboard appears after successful login:



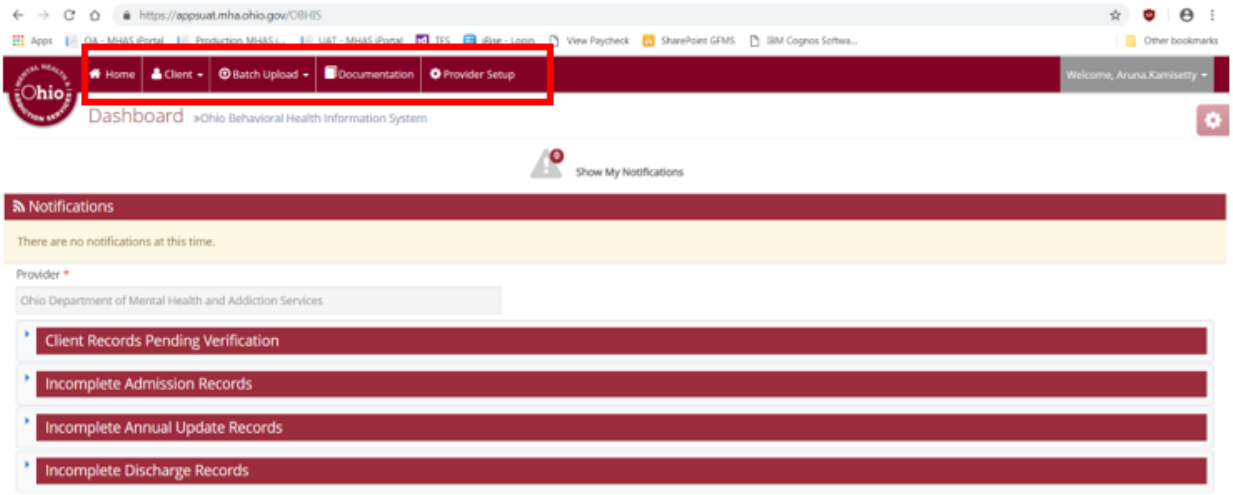
6. OBHIS will display on iPortal dashboard under My Application section. OBHIS application role display under OBHIS depending on the role and permission of their account.



OBHIS Dashboard

1. The user clicks on the OBHIS application, and the user will navigate to OBHIS dashboard.
2. Depending on the user permissions different tabs display on OBHIS dashboard.

Provider Setup tab will be available to Provider Administrator and OhioMHAS Business Administrator.



Home Tab

Roles: Provider Administrator, Provider User and Third-Party Vendor have access to all sections. The OhioMHAS Business Administrator can see only Notifications section.

Notifications

1. The system will display the number next to the "Show My Notification" header on Dashboard.
2. The system will display the message: "There are no notifications at this time" if no notifications exist.

Provider

1. The providers that are associated with the user will display in dropdown.
    a. If the user associated with one provider, it will display in the dropdown by default
    b. If the user associated with more than one provider all the providers will display in the dropdown.

Clients Records Pending Verification:

1. The clients, who are not verified for 365 days, will be displayed under this section.
2. The user is able to edit erroneous information by using Edit link.

Incomplete Admission Records

1. Incomplete Admission Records display under this section.
2. The user is able to edit Admission information by using Edit link.

Incomplete Annual Update Records

1. Incomplete Annual Update Records display under this section.
2. The user is able to edit Annual Update information by using Edit link.

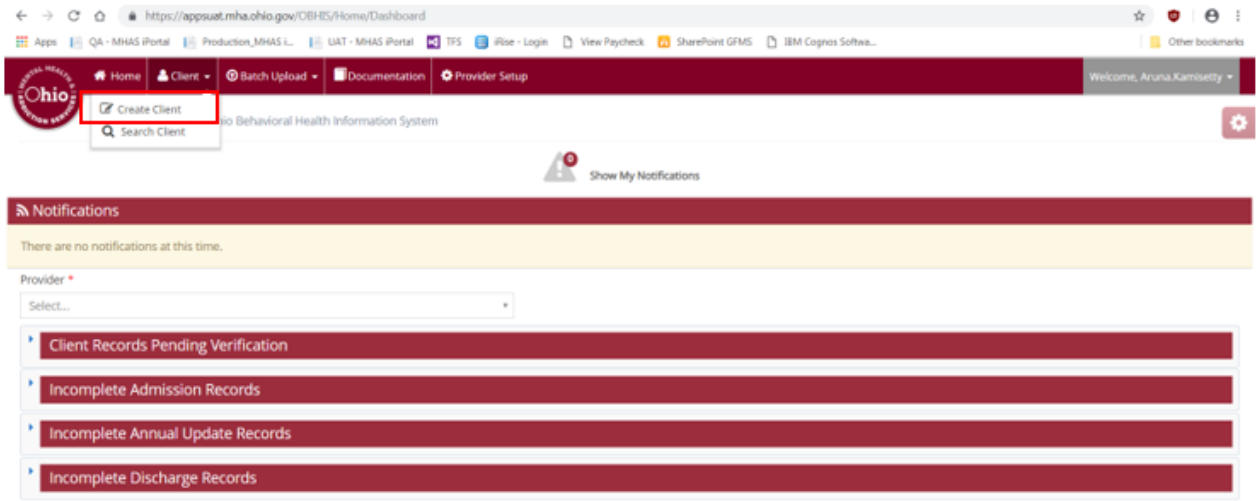
Incomplete Discharge Records

1. Incomplete Discharge Records display under this section.
2. The user is able to edit Discharge information by using Edit link.

Client Tab

In this section the user will be able to create a new client and admission record. To edit or delete a client or admission record, the user must perform a search for that record. Please see the "Search" section of the user guide for instructions.

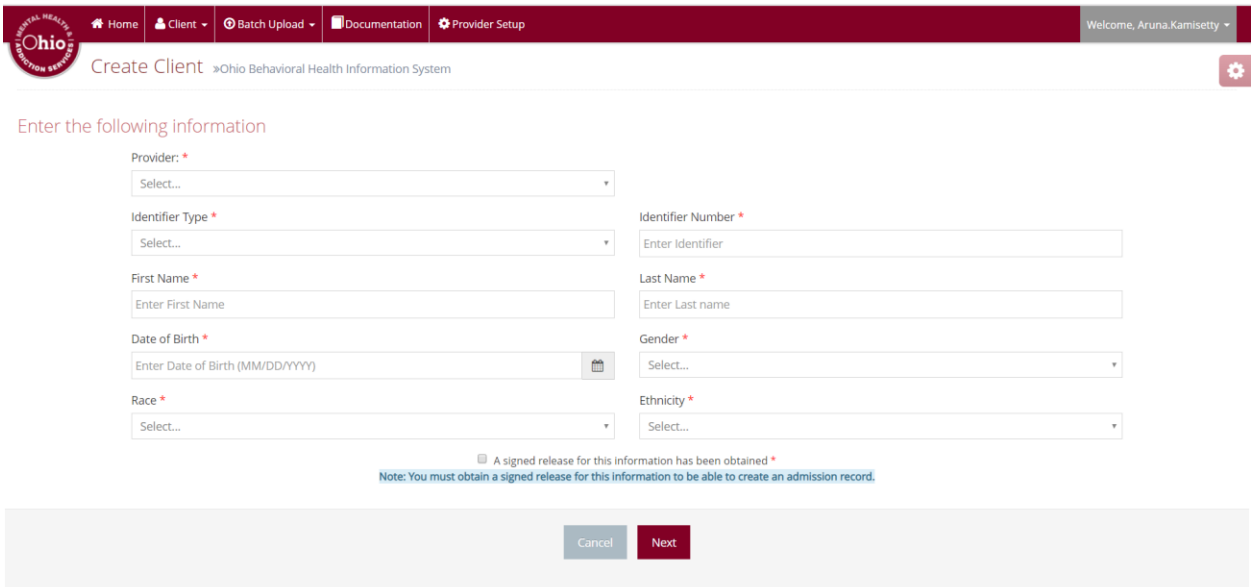
From the Navigation bar select "Client" and select Create Client.



Create Client

Roles: Provider Administrator, Provider User and Third-Party Vendor are able to create Client. The OhioMHAS Business Administrator can view the client.

On the "Create Client" screen, enter the required information and select the Next button. The User will be taken to the "Admission Record" screen.

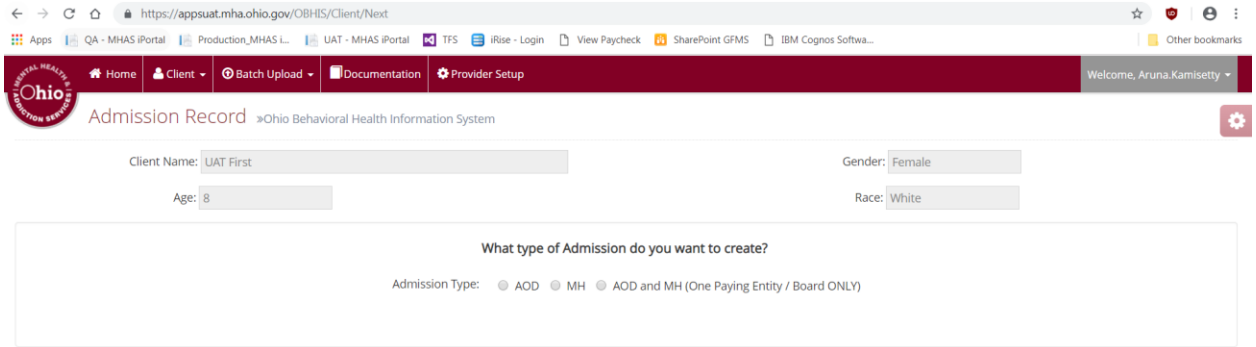


In order to proceed with creation of an admission record, the box stating that "A signed release for the information has been obtained" must be checked.

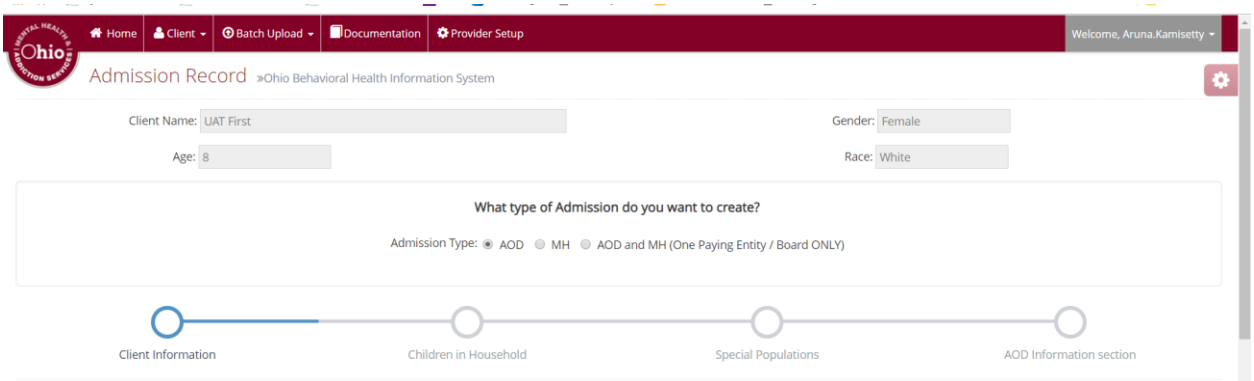
Create New Admission

Roles: Provider Admin, Provider User and Third-Party Vendor able to create Admission. The OhioMHAS Business Administrator can view the client.

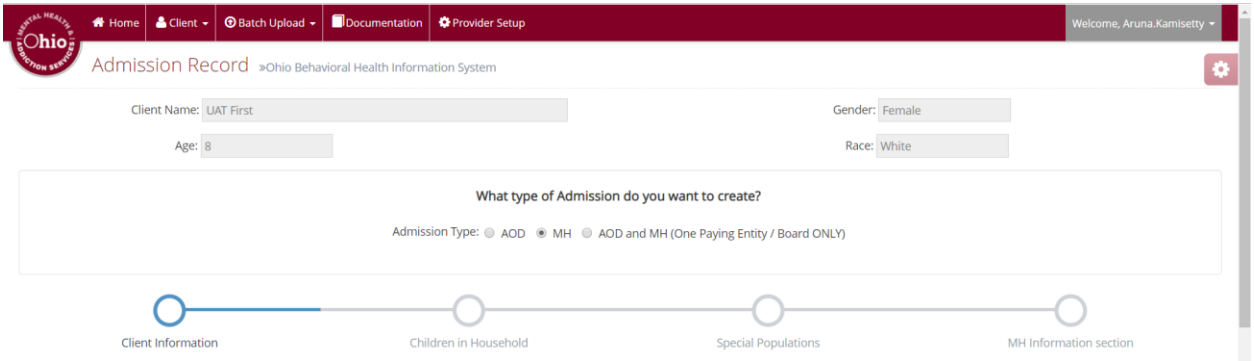
1. On the "Admission Record" screen, select the type of admission: AOD Only, MH Only, or AOD and MH. Once the admission type has been selected, the user will be taken automatically to the next screen.



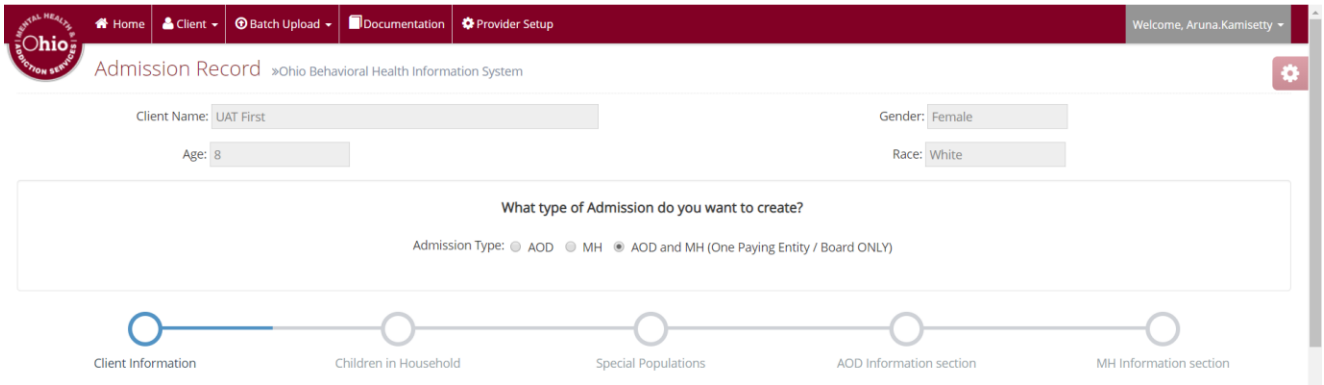
2. Admission Types:
   a. AOD Admission has four sections
      i. Client Information
      ii. Children in Household
      iii. Special Populations
      iv. AOD Information



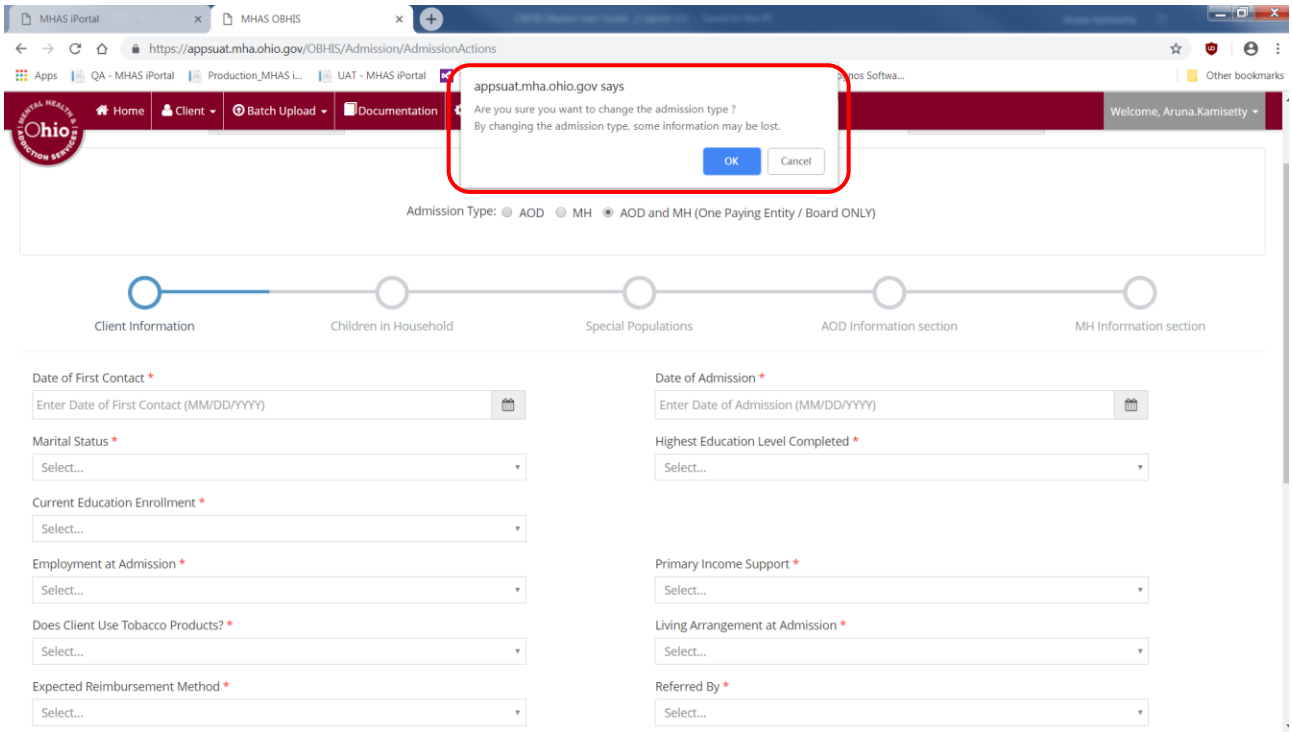
   b. MH Admission has four sections
      i. Client Information
      ii. Children in Household
      iii. Special Populations
      iv. MH Information



c. Dual (AOD and MH) Admission has five sections.
   i. Client Information
   ii. Children in Household
   iii. Special Populations
   iv. AOD Information
   v. MH Information



3. The different sections in the Admission record are presented in a wizard format depending on the admission type selected.
4. The user can change the admission type any time before the admission is submitted, but will receive the following message:



5. Client Information Screen

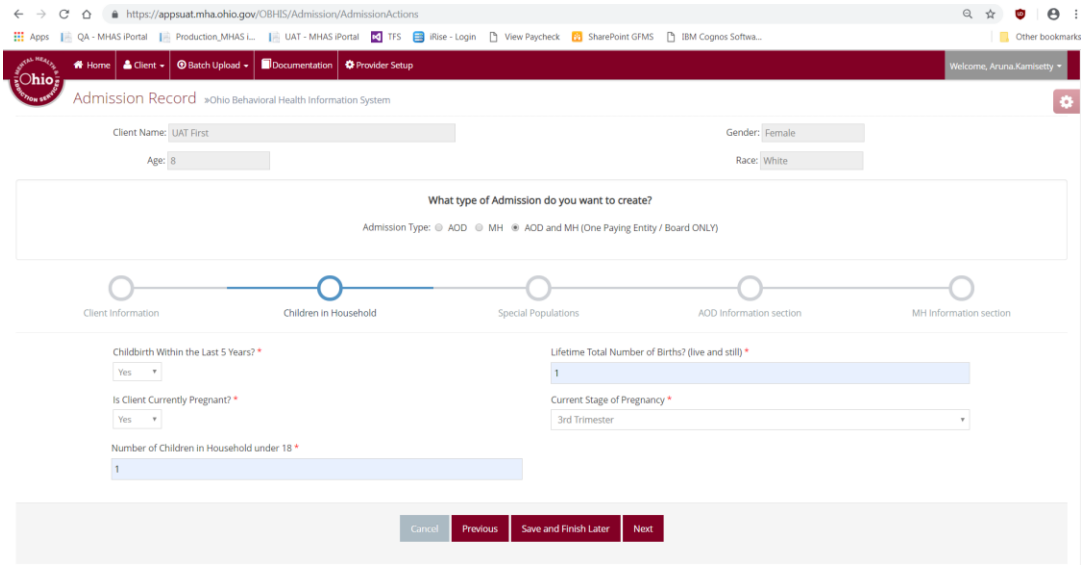
a) The first screen to be presented is the ”Client Information" screen. Enter all the required information and select the Next or Save and Finish Later button.

b) For the <u>Save and Finish Later</u> button to function, <u>Date of First Contact</u> must be entered.

ⓘ If the <u>Save and Finish Later</u> button has been selected, the user has 14 days to submit and save complete information or the record will be deleted.

c) Select the Next button will navigate the user to “Children in Household” Screen.

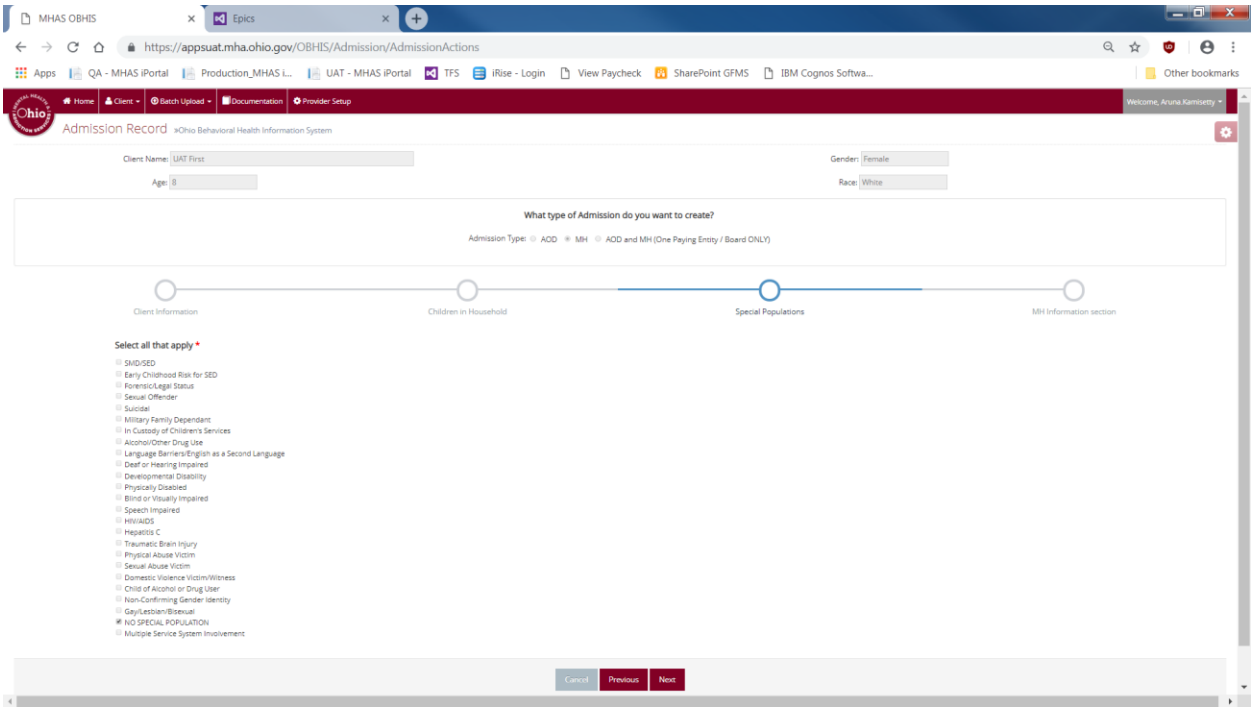
6. Children in Household Screen



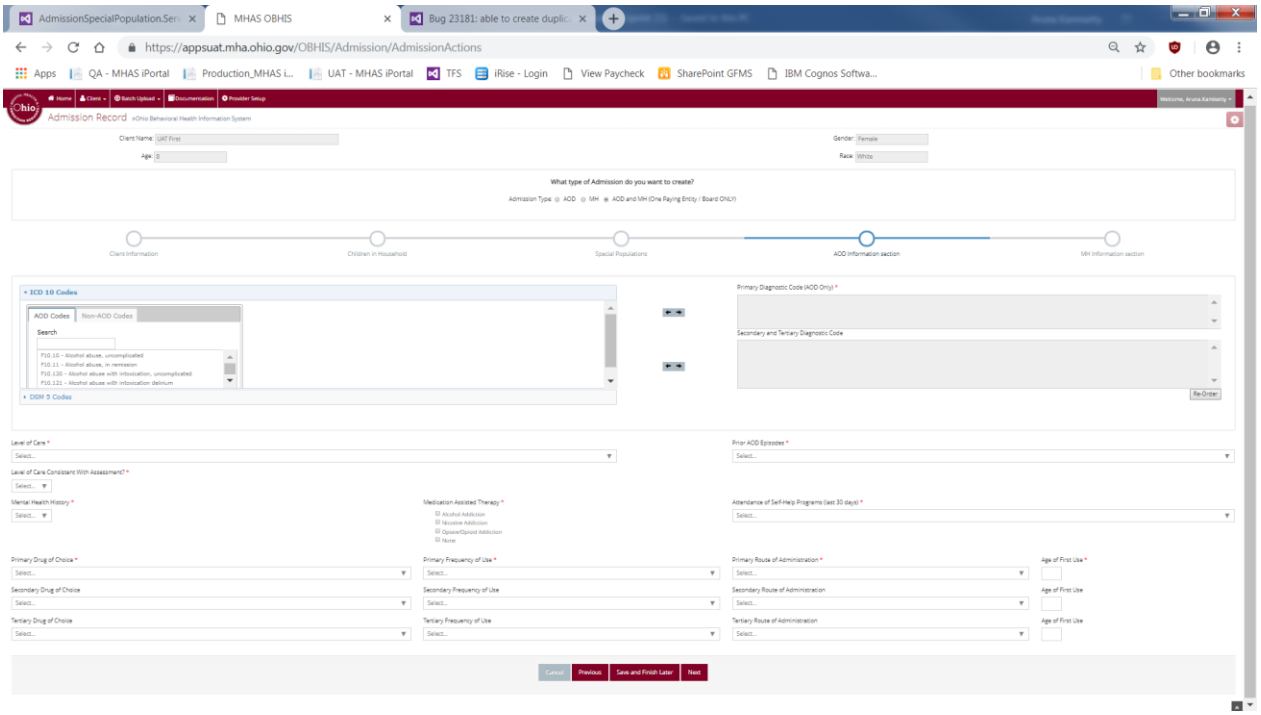
a) On the "Children in Household" screen, enter the required information and select the Cancel, Previous, Save and Finish Later, or Next button.
b) The Previous button will return the User to the previous screen but will not save any data that was input before the button was selected. For the information to be saved, the User must select the Save and Finish Later button
c) If the Gender is "Male" or "Unknown," the pregnancy-related questions will not appear on the "Children in Household" screen.
d) When the user selects the Next button, they will be taken to the "Special Populations" screen.

7. Special Populations Screen
   a) Select all that apply on Special Populations screen and select the Next button to navigate to the AOD screen for AOD admission OR navigate to MH screen for MH admission type

      ⓘ If "No Special Population" is selected, the user cannot select any other selections.



8. AOD/MH/Dual Admissions
   a. AOD Admission Type

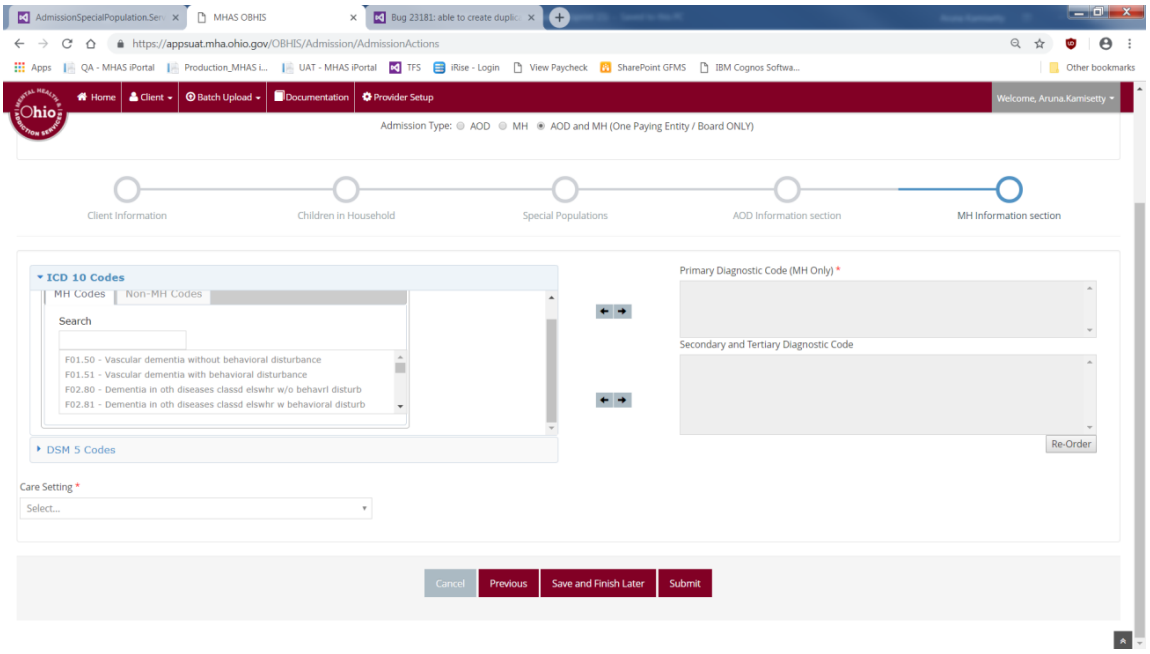


1. Enter all the required information on the AOD Information Section screen. To enter the ICD 10 Codes or DSM 5 Diagnostic Codes:

a. Select the desired code and click on right arrow next to the Primary Diagnostic Code box and selected code will move.
b. Select the desired code and click on right arrow next to the Secondary and Tertiary Diagnostic Code box and selected codes will move. A maximum two codes are able to be moved into this box.
c. Select the codes where the user wants to remove click on left arrow Selected code will be removed from Primary, Secondary and Tertiary Diagnostic Code.

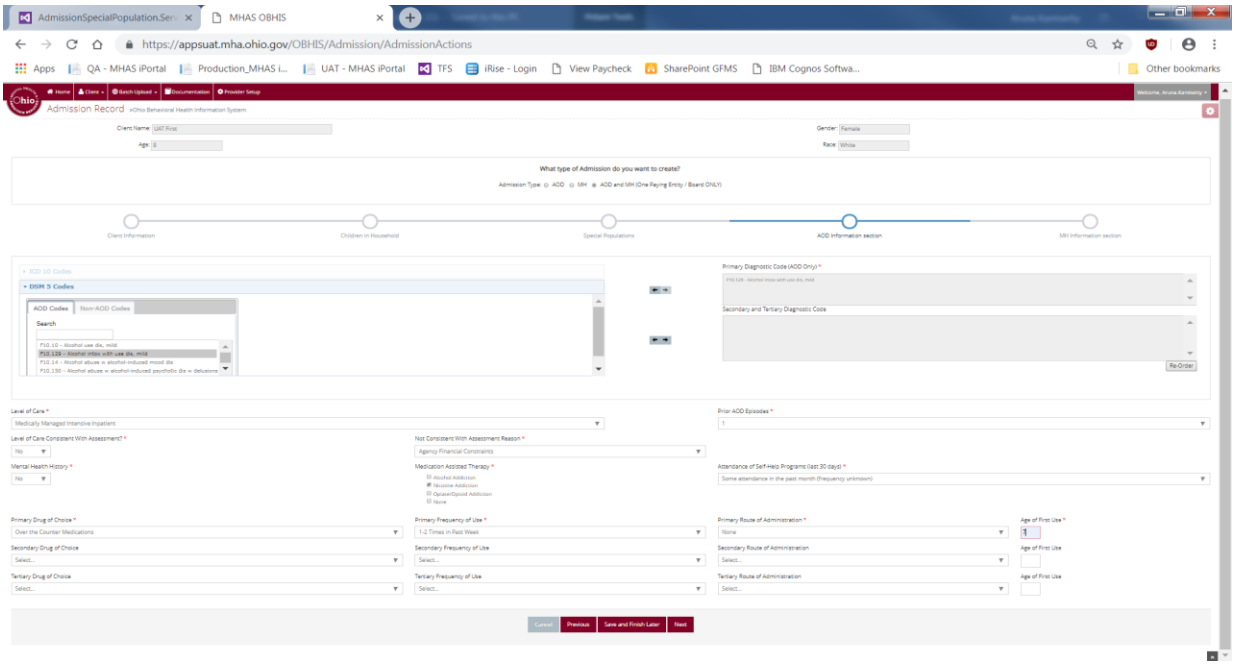
b. MH Admission Type

1. Enter all required information on the "MH Information Section" screen.

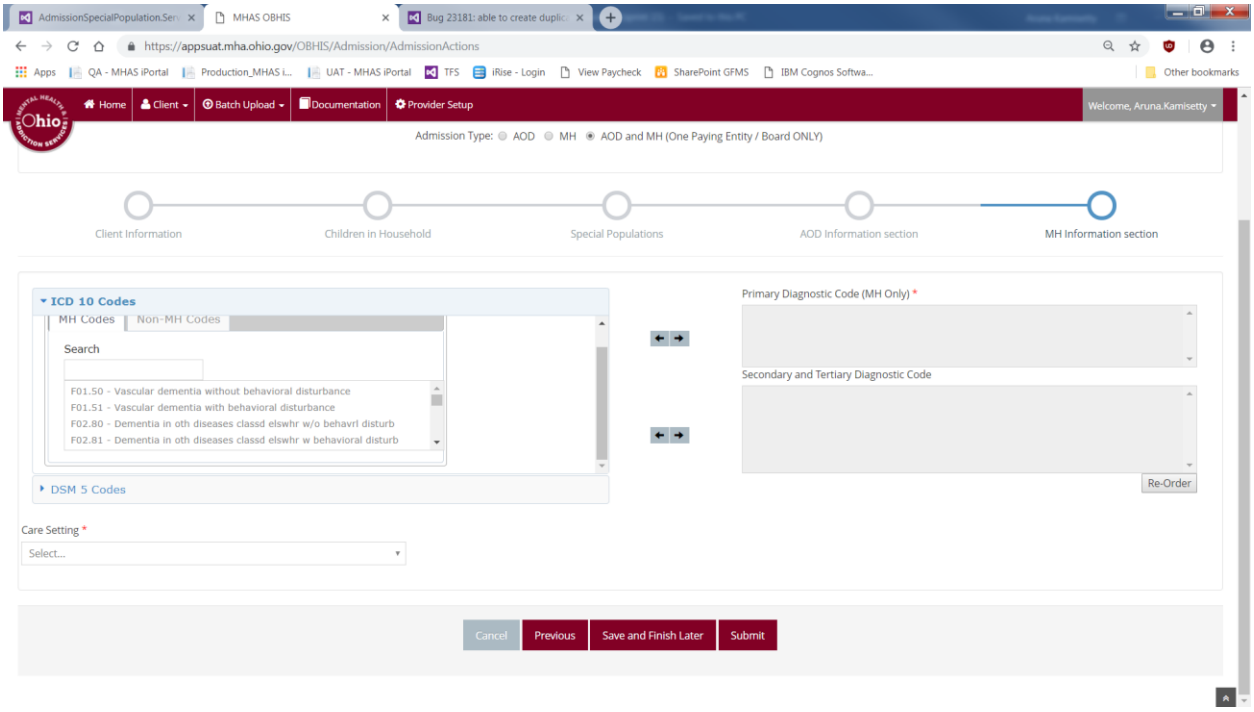


c. Dual Admission Type

1. AOD Information Section:



2. MH Information Section:



2. Once all required information has been entered, select the <u>Submit</u> button. The admission record information has been successfully submitted to OhioMHAS.

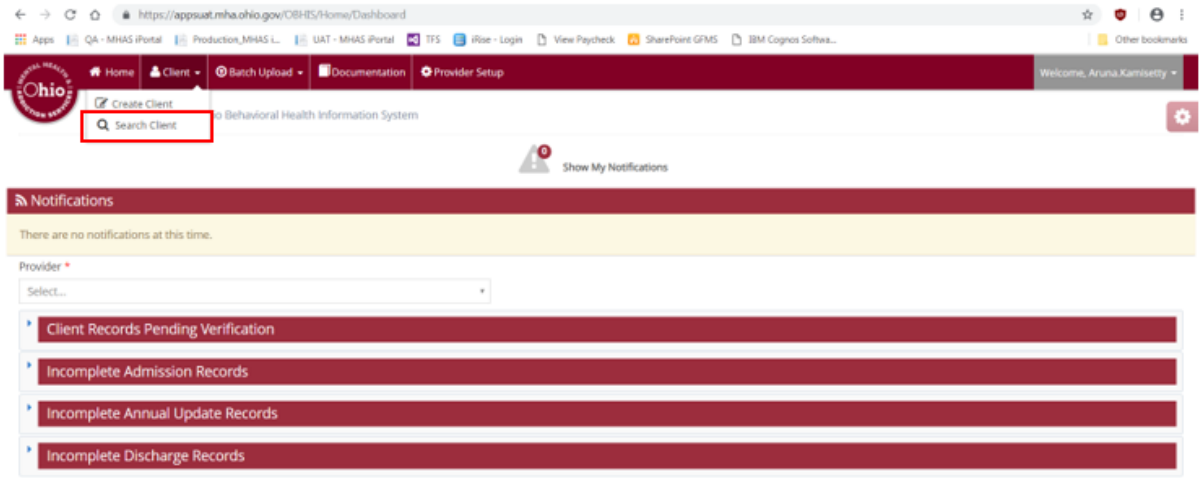
ⓘ For single admission type, AOD or MH, the "Submit" button will display after AOD/MH Information section

For dual admission type, AOD & MH, the “Submit” button will display after MH Information section.

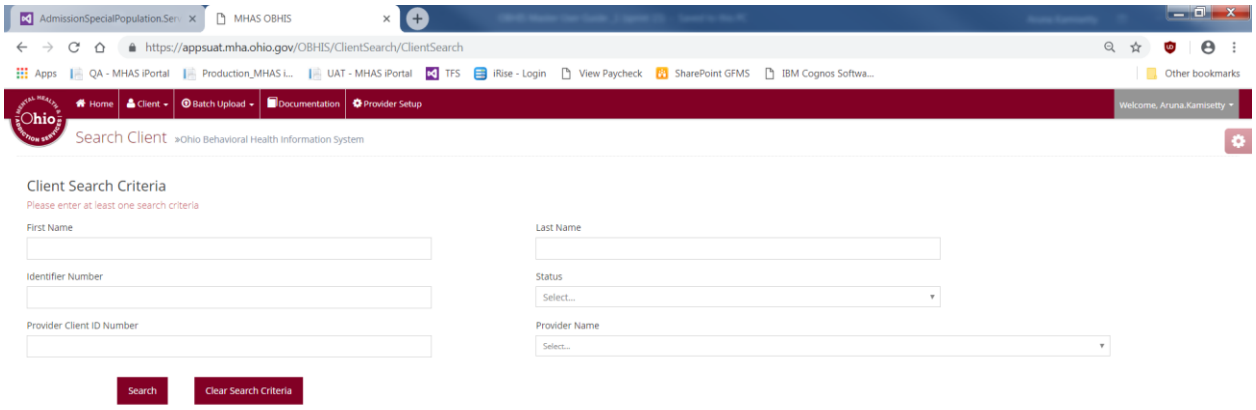
Search Client

Roles: Provider Admin, Third-Party Vendor, Provider User and the OhioMHAS Business Administrator have access to this functionality.

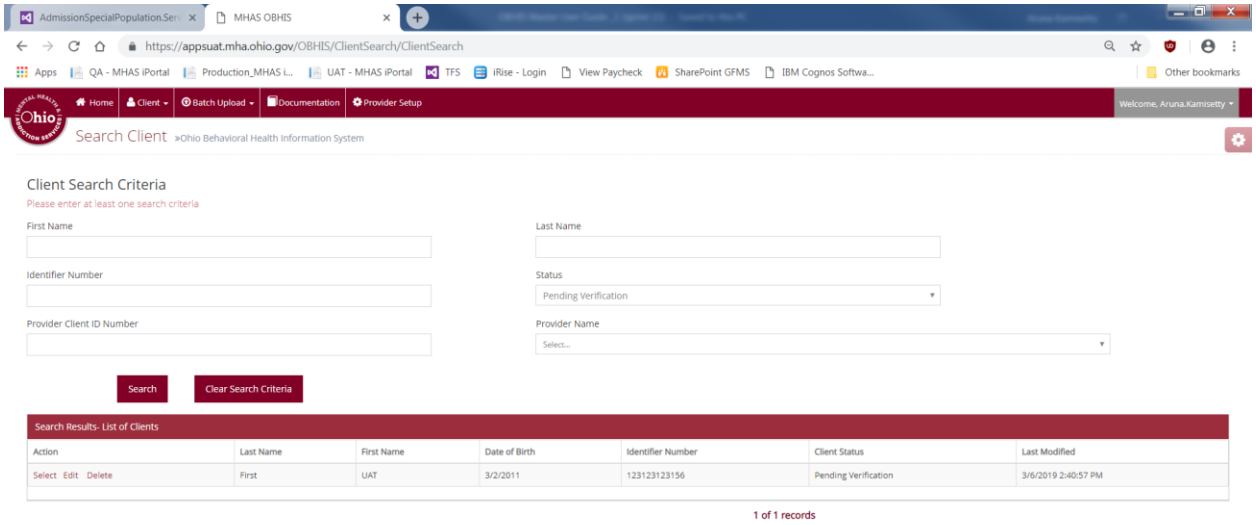
1. In the top Navigation Bar, under the “Client” tab, select the Search Client link



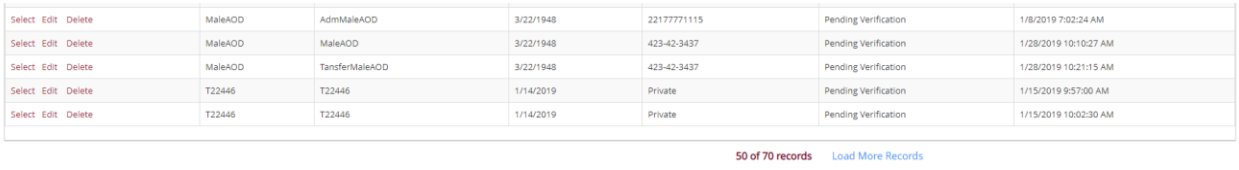
2. On the “Search Client” screen, enter in at least one search criteria and select the Search button. It is suggested to enter as much search criteria as possible to narrow the search results.



3. The search results will appear in the “Search Results – List of Clients” table.
4. Depending on the action required, select the Select, Edit, or Delete link to proceed.

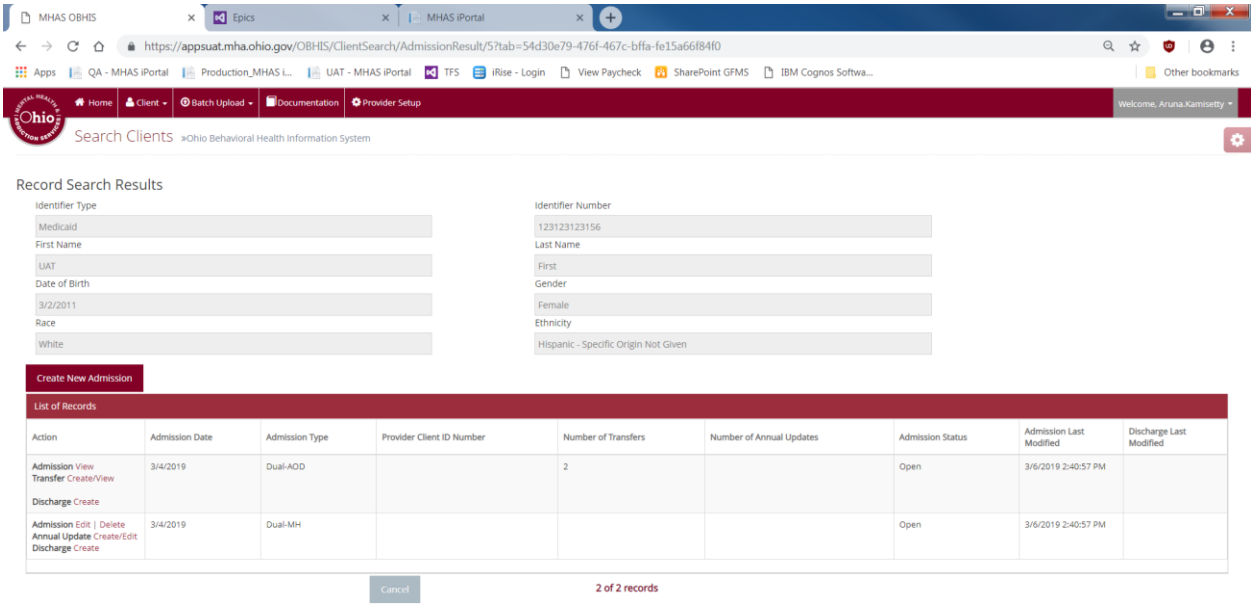


5. The table will only show 50 search results at a time. If there are more than 50 records that match this search criteria, a message "50 of xx records" will appear.
6. To display the remaining records in the table, select the Load More Records link.



I. Select Client

1. Click on Select link, the "Record Search Results" page will display.



2. Functionality included on Record Search Results Page:

a. The user can Create New Admission for existing client
    i. Refer Create New Admission section for steps
b. The user can perform Edit/Delete/View for Admission records
    i. Refer Edit Admission section to perform Edit
    ii. Refer Delete Admission section to perform Delete
    iii. Refer View Admission section to perform View
c. The user can View/Delete if Transfer record available for AOD admission type
d. The user can perform Edit/Delete if Annual Update available for MH admission type
e. The user can Create/Edit/Delete Discharge

II. Edit Client

Roles: Provider Admin, Provider User and Third-Party Vendor able to Edit Client.

1. Click on Edit link, "Edit Client" page will open
2. The user can edit all fields, Identifier type, identifier number, first name, last name, race and ethnicity except DOB, Provider Name, and Gender fields
3. The user clicks on Submit button once changes are done

III. Delete Client

Roles: Provider Admin, Provider User and Third-Party Vendor able to Edit Client.

1. The user is able to delete the client record/information by clicking on Delete link

ⓘ The Client cannot be deleted if there is an Annual Update, Transfer or Discharge associated with the client record

Admission Functionalities

The user can perform Edit/Delete/View admission records for clients.

ⓘ Some business rules apply to Edit or Delete admission. Refer business rules document

Edit Admission

Roles: Provider Admin, Provider User and Third-Party Vendor able to Edit Admission.

1. Perform a "Search" for the Client record.
2. On the "Record Search Results" screen, in the "List of Records" table select the Edit link next to the Admission Record.
3. The Admission record for the client will be presented in a draft status, allowing for editing.
4. Once the user has completed the necessary changes, click on the Submit button in the last screen. It will save all changes.
5. If the client has been discharged OR the admission date is older than 6 months OR the client has Transfer or Annual Update record, the user will only see a View link and will not be able to edit that record.

Delete Admission

Roles: Provider Admin, Provider User and Third-Party Vendor able to Delete Admission

1. Perform a "Search" for the Client record.
2. On the "Record Search Results" screen, in the "List of Records" table, select the Delete link next to the appropriate record.
3. A window will appear to validate that you want to delete the Admission record. If the user wants to continue with the deletion, a reason must be entered.
4. The user cannot delete an "AOD" admission with a transfer record or an "MH" admission with annual update record.

View Admission

Roles: Provider Admin, Provider User, Third-Party Vendor and the OhioMHAS Business Administrator are able to view an admission.

1. The user will see a View link next to the Admission if the admission date is six months old, if the client has been discharged, or if an MH annual update has been created or AOD transfer has been created.
2. View screens are for read only purpose.
3. The user can cancel the action at any time. The user will navigate to the "Search Results Page" if the user clicks on the Cancel button
4. The user can use Previous and Next buttons to access previous and next screens.

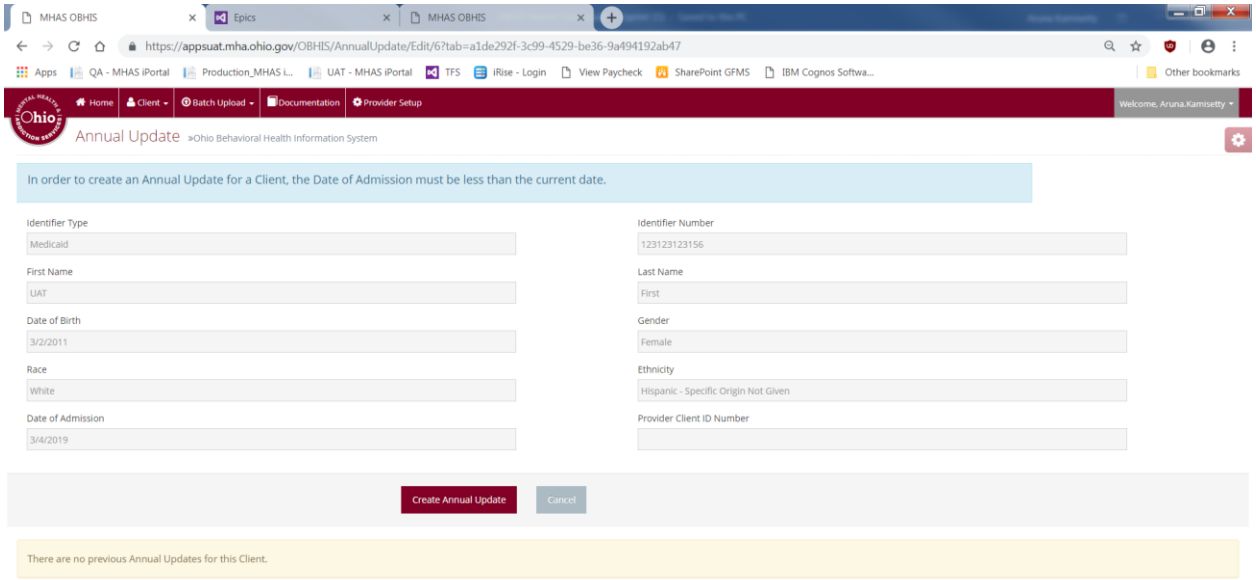
MH-Annual Update

Annual Update records are only needed for MH admission type records. To create an Annual Update for a Client, the Date of Admission must be greater than the current date.

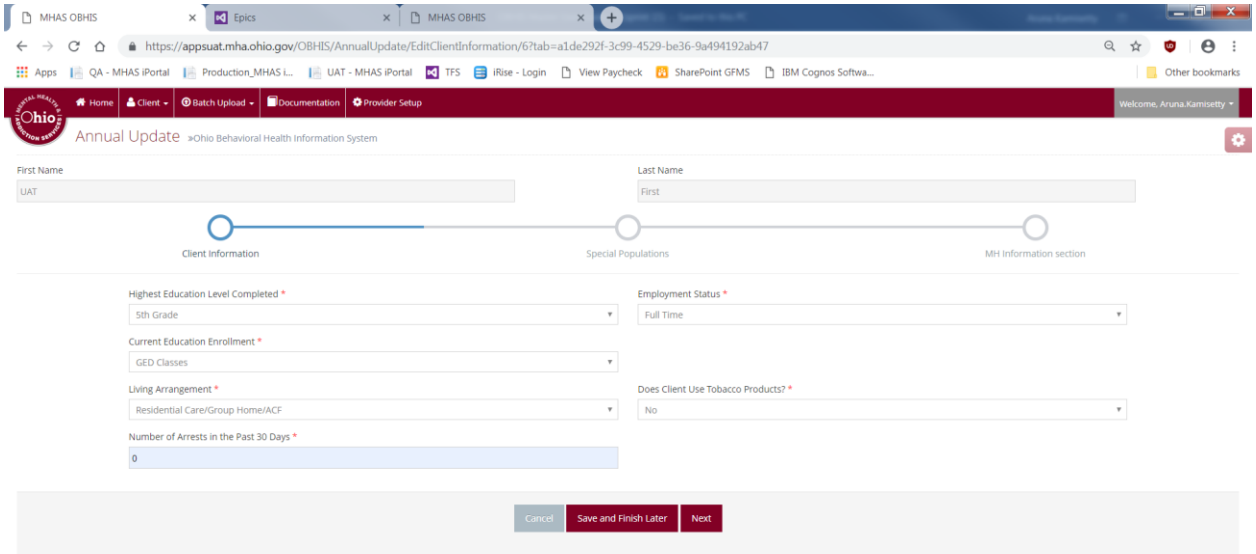
Create Annual Update

Roles: Provider Admin, Provider User and Third-Party Vendor are able to create the Annual Update.

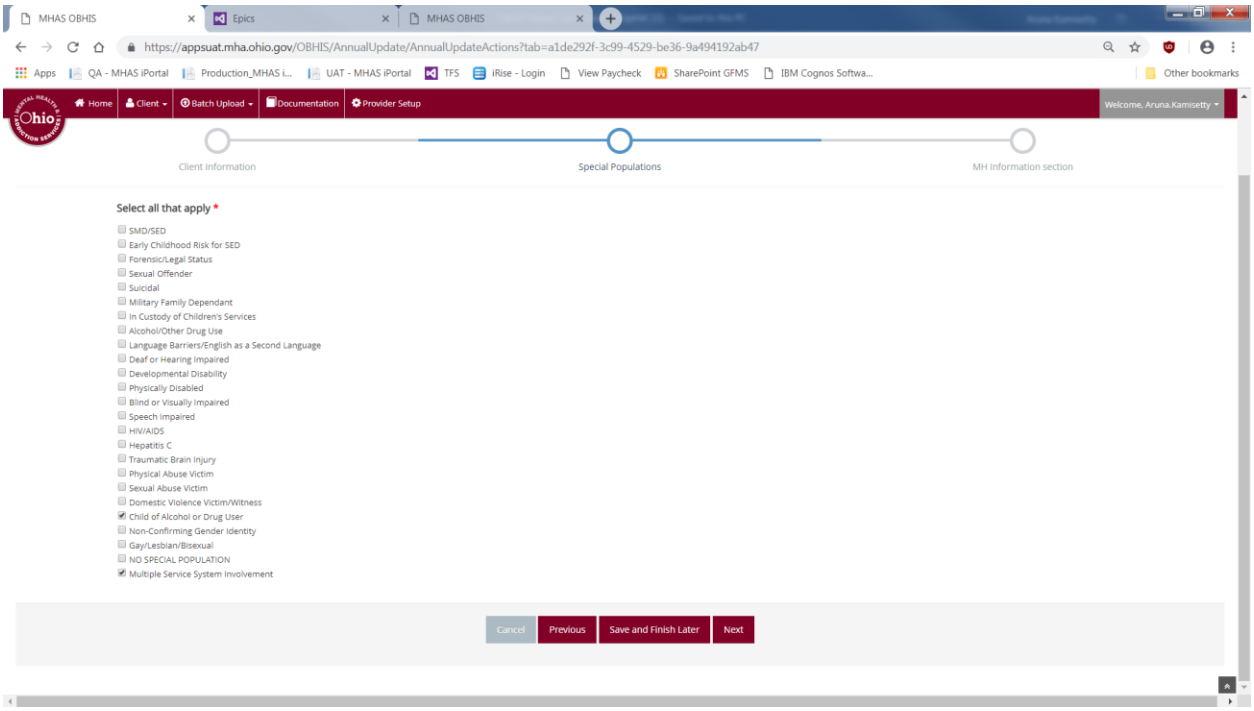
1. Perform a "Search" for the Client record.
2. On the "Record Search Results" screen, in the "List of Records" table select the Create link next to the appropriate record.
3. The "Annual Update" screen will appear, listing the client information at the top of the screen.
4. Select the Create Annual Update button.



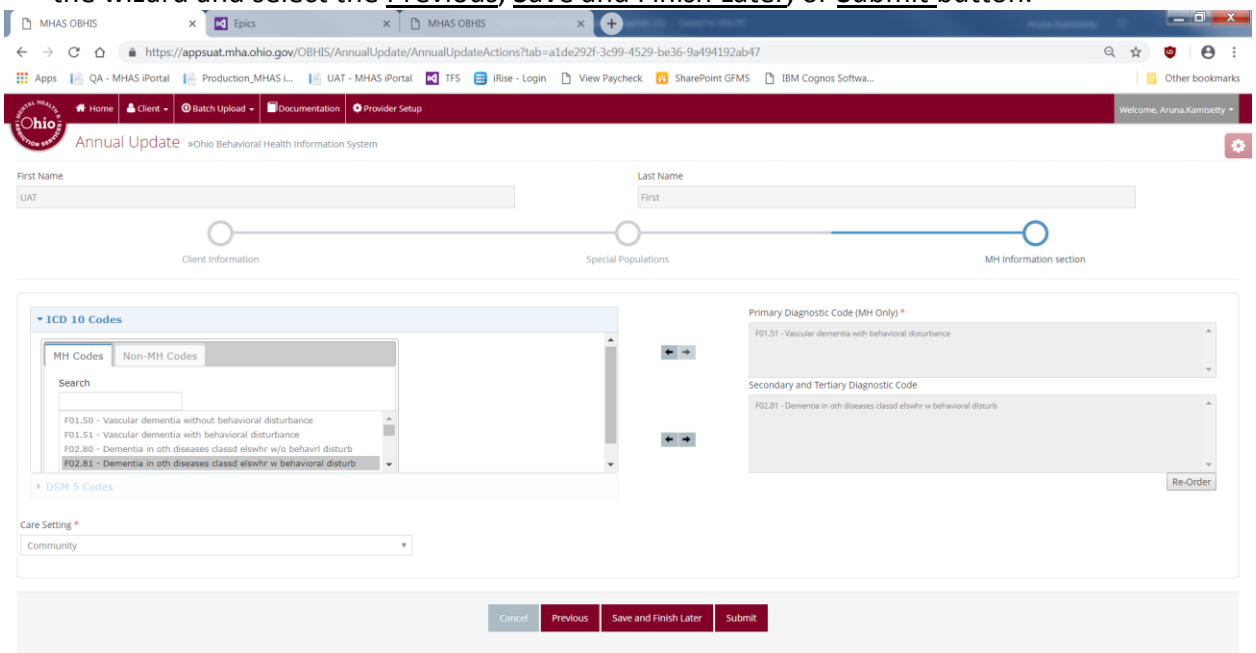
5. Complete the required information in the “Client Information” section of the wizard and select the Previous, Save and Finish Later, or Next button.



6. Complete the required information in the “Special Populations” section of the wizard and select the Previous, Save and Finish Later, or Next button.



7. Complete the required information in the "MH Information" section (if applicable) of the wizard and select the Previous, Save and Finish Later, or Submit button.

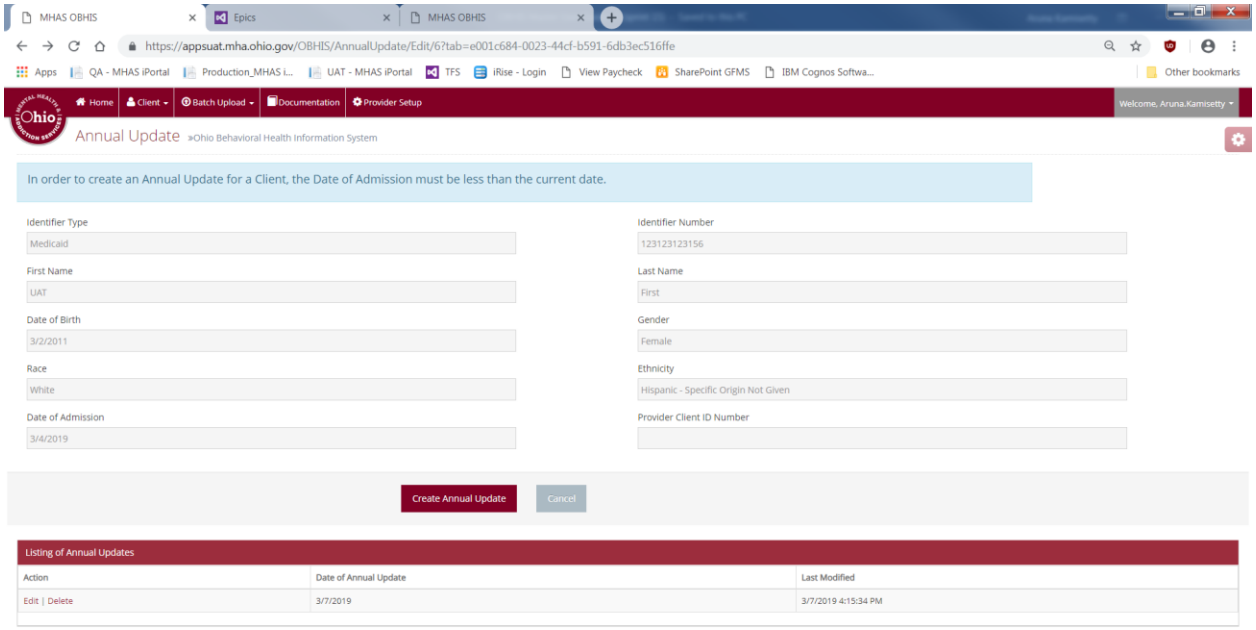


8. The Annual Update information will be submitted to OhioMHAS.

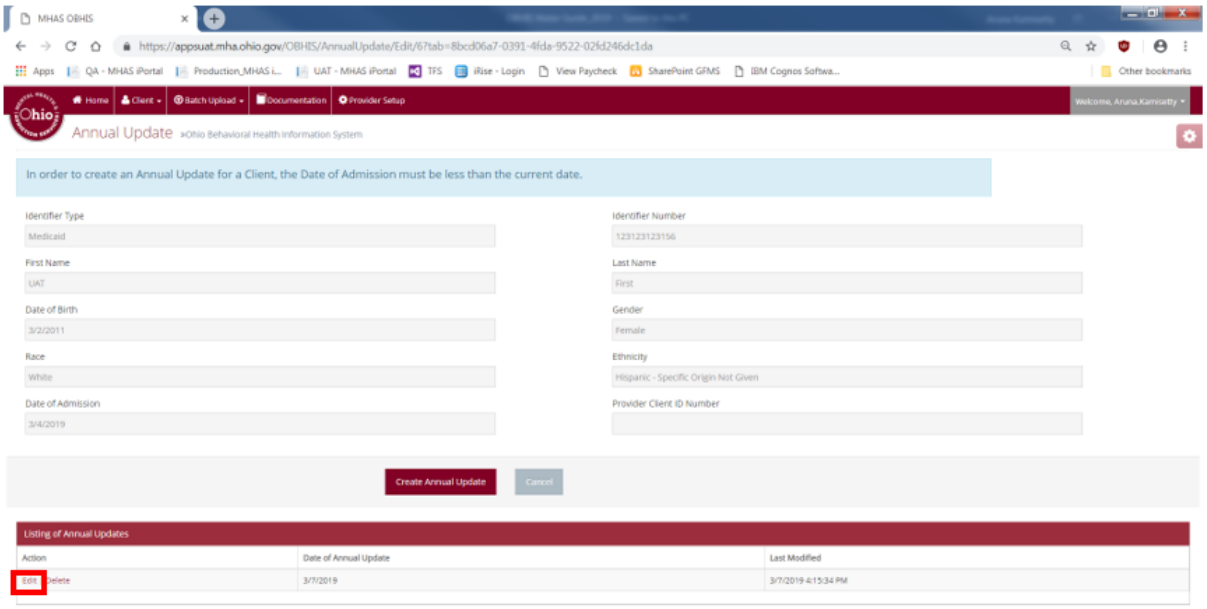
Edit Annual Update

Roles: Provider Admin, Provider User and Third-Party Vendor able to Edit Annual Update

1. Perform a “Search” for the Client record.
2. On the “Record Search Results” screen, in the “List of Records” table select the Edit link next to the Annual Update



3. The “Annual Update” screen will appear, listing the client information at the top of the screen.
4. In the “Listing of Annual Updates” table, select the Edit link.

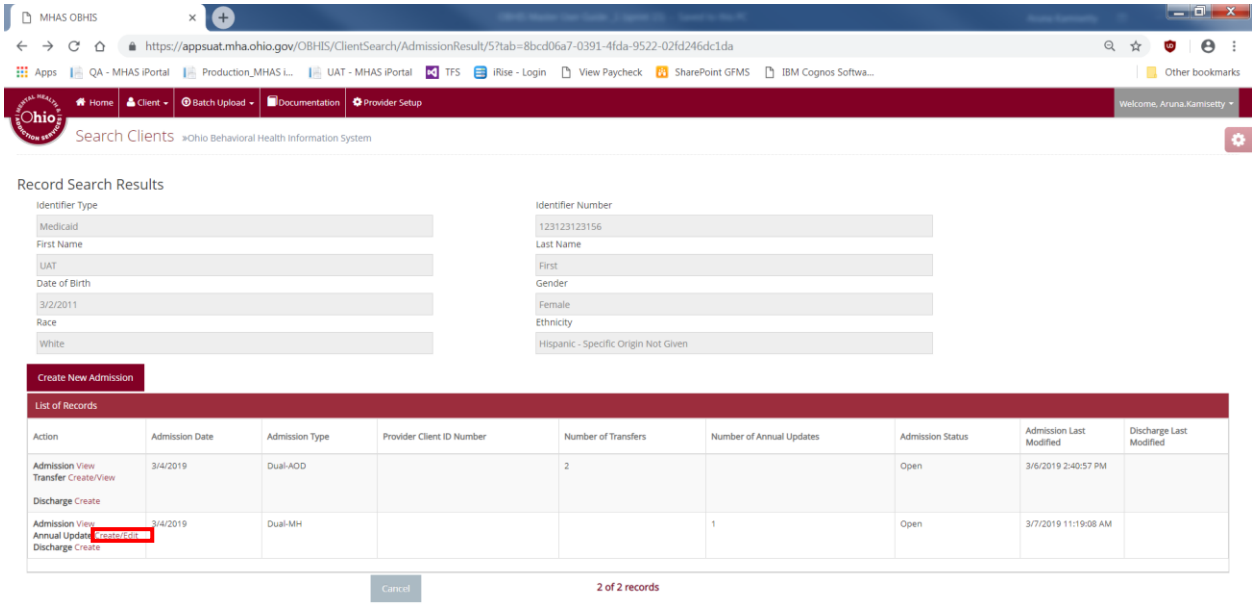


5. Make any changes to the various screens (Client Information/Special Populations/MH Information section) of the Annual Update record and select the Submit button on the last screen of the Annual Update wizard.
6. The edited Annual Update information will be submitted to OhioMHAS.

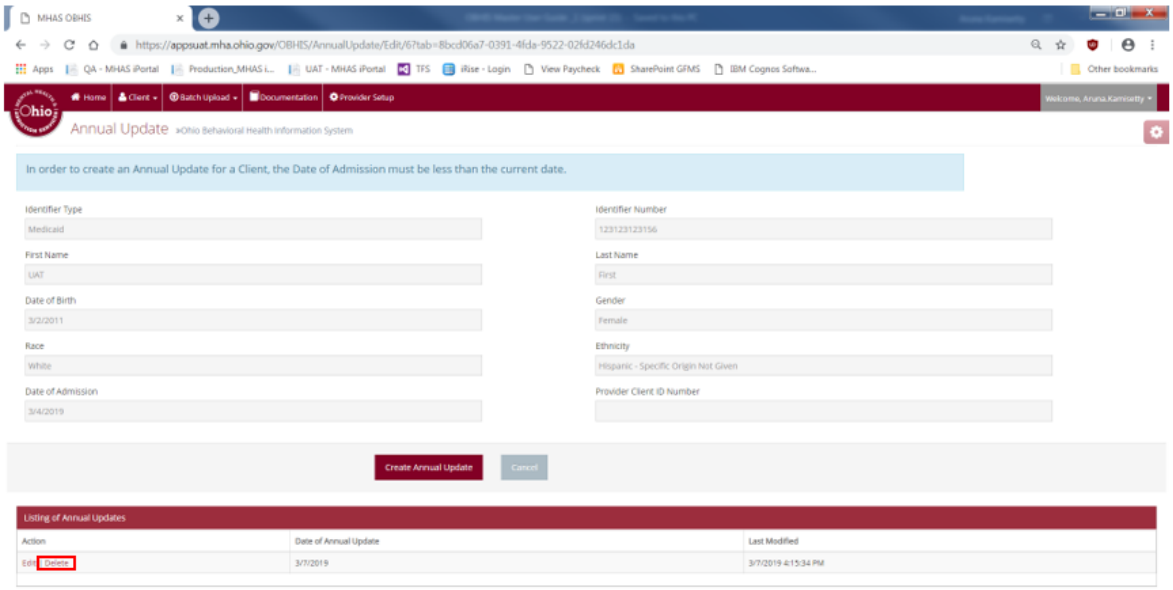
Delete Annual Update

Roles: Provider Admin, Provider User and Third-Party Vendor are able to Delete Annual Update

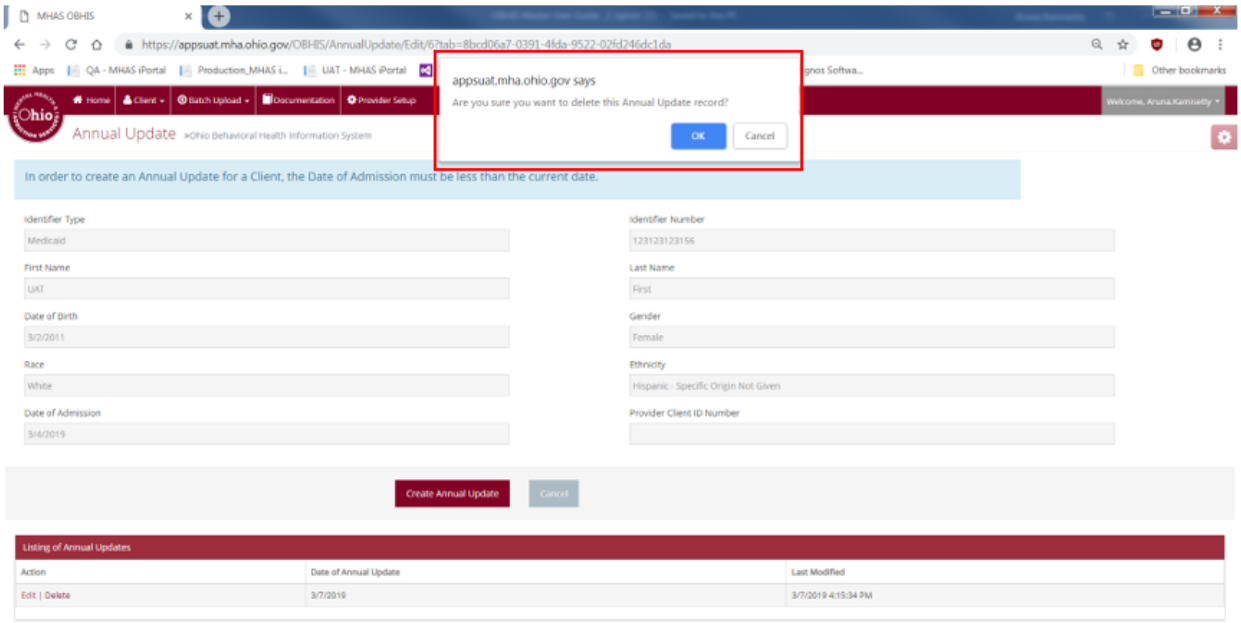
1. Perform a "Search" for the Client record.
2. On the "Record Search Results" screen, in the "List of Records: table select the Create/Edit link next to the Annual Update.



3. The "Annual Update" screen will appear, listing the Client information at the top of the screen.
4. In the "Listing of Annual Updates" table, select the Delete link.



5. A window will appear to validate that the user wants to delete the annual update record.



6. Click <u>OK</u> to delete the Annual Update record
7. Click <u>Cancel</u> to cancel the transaction

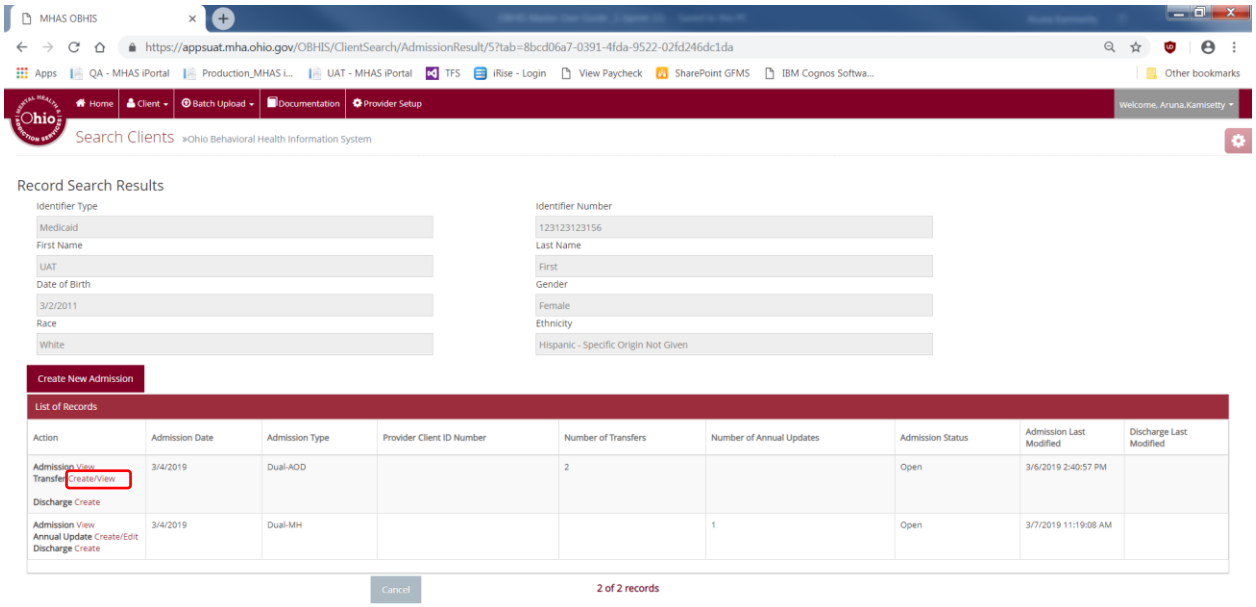
AOD-Transfer

Transfer records are only needed for AOD admission type records.

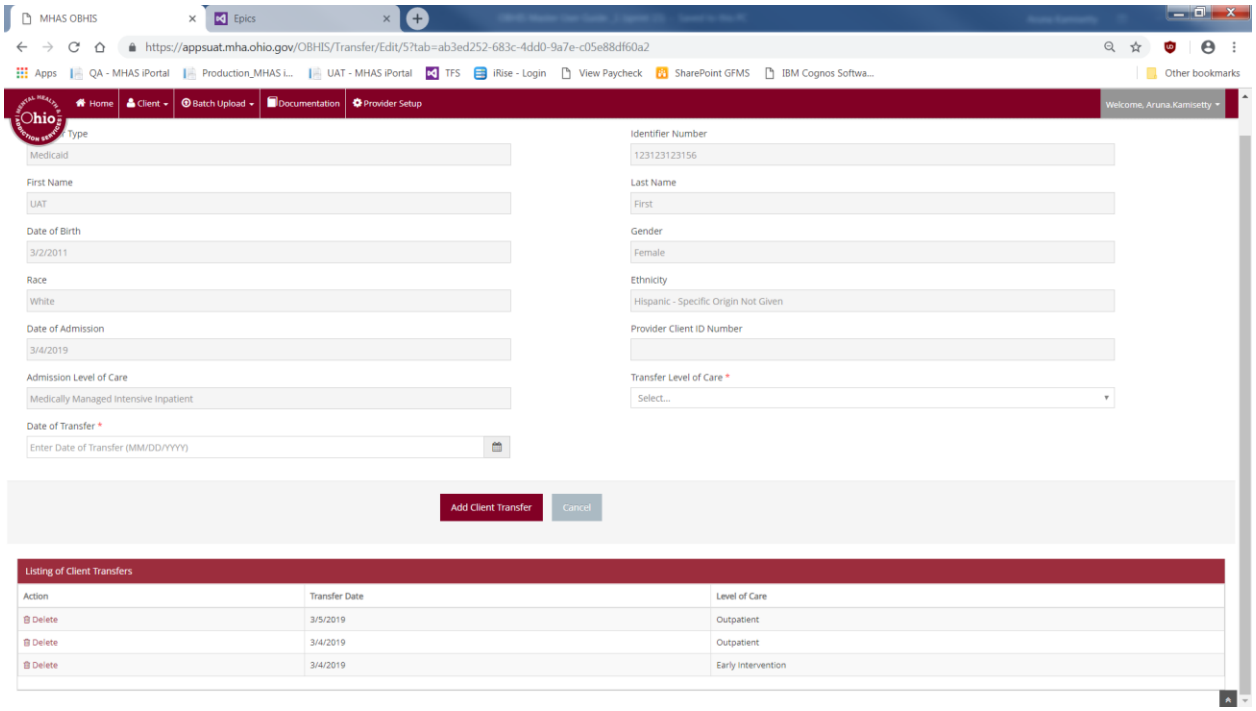
Create Transfer

Roles: Provider Admin, Provider User and Third-Party Vendor able to Create Transfer

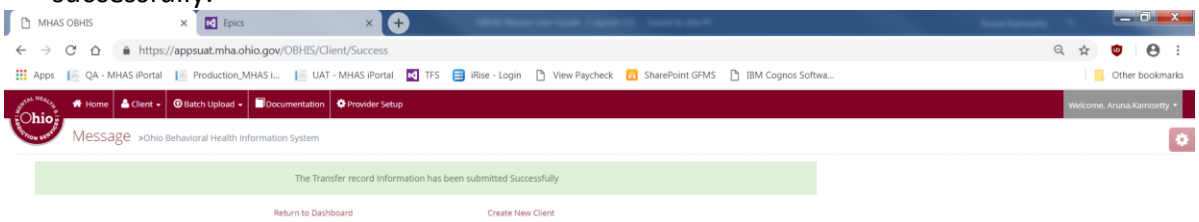
1. Perform a “Search” for the Client record.
2. On the “Record Search Results” screen, in the “List of Records” table select the Create link next to the Transfer record.



3. The “Add Client Transfer” screen will appear, listing the Client information at the top of the screen.
4. Enter the required information and select the Add Client Transfer button.



5. The user will see the message "The Transfer record information has been submitted successfully."



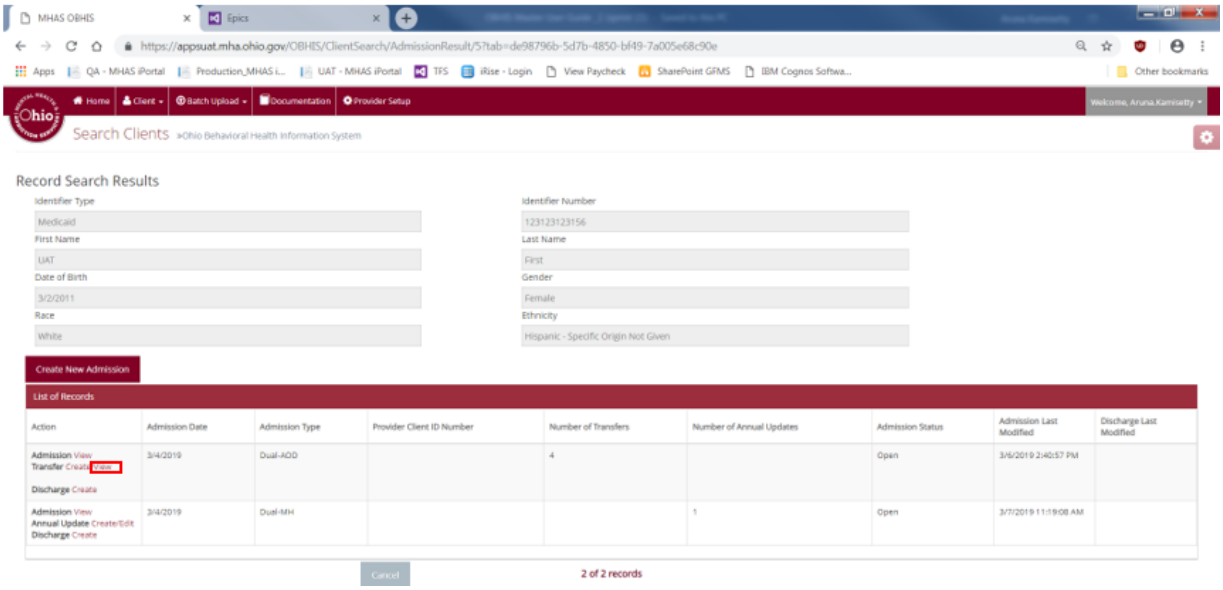
6. The next time the user performs a search on this record, the transfer record will be listed in the "Listing of Client Transfers" table.

View Transfer

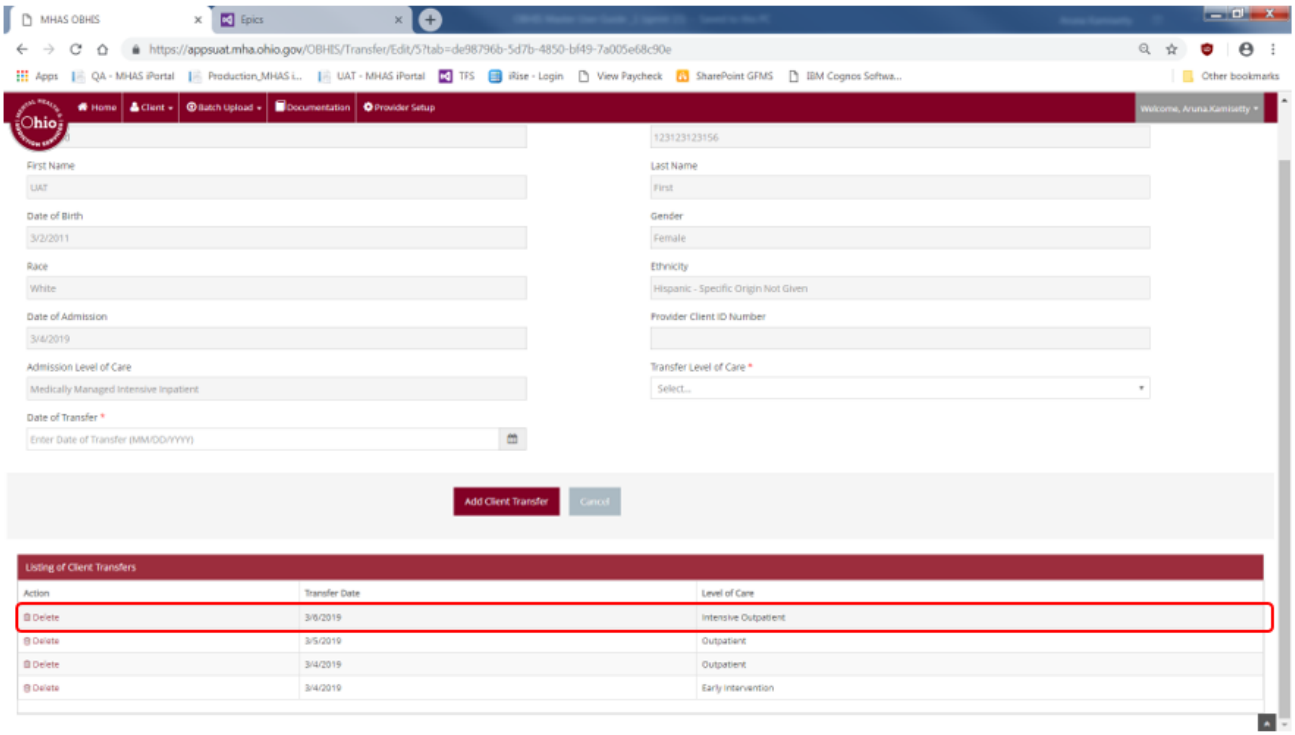
Roles: Provider Admin, Provider User, Third-Party Vendor and the OhioMHAS Business Administrator are able to view Transfer

1. Perform a "Search" for the Client record.
2. On the "Record Search Results" screen, in the "List of Records" table select the View link next to the Transfer record.

the appropriate record.



3. The added Transfer record will be listed in the “Listing of Client Transfers” table on the “Add Client Transfer” screen.

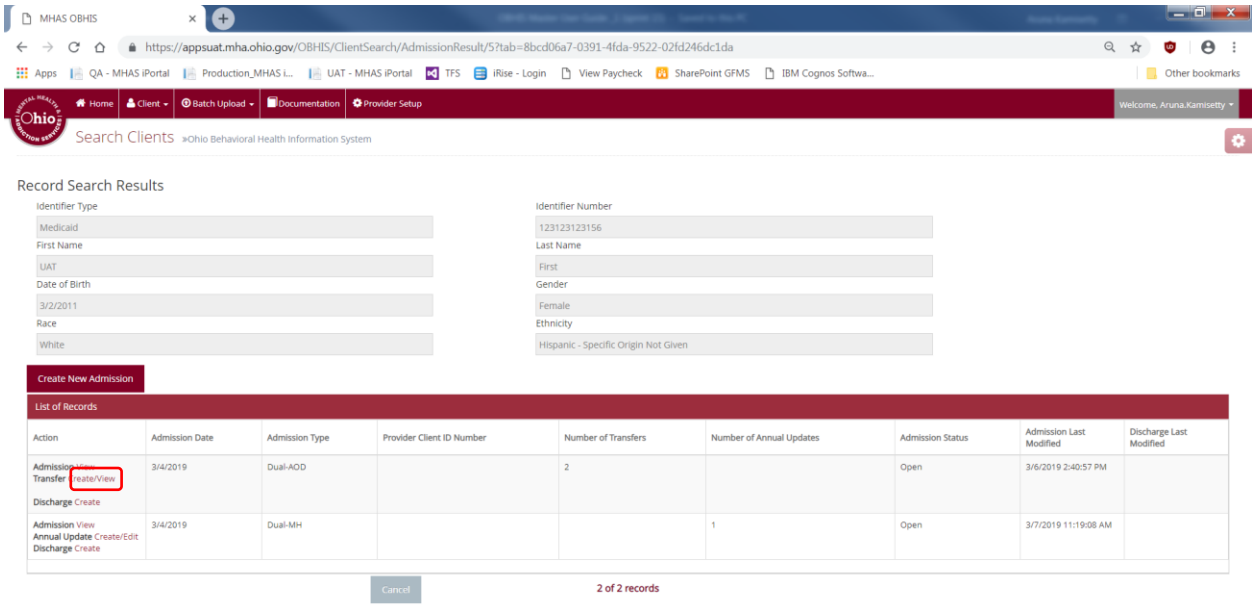


Delete Transfer

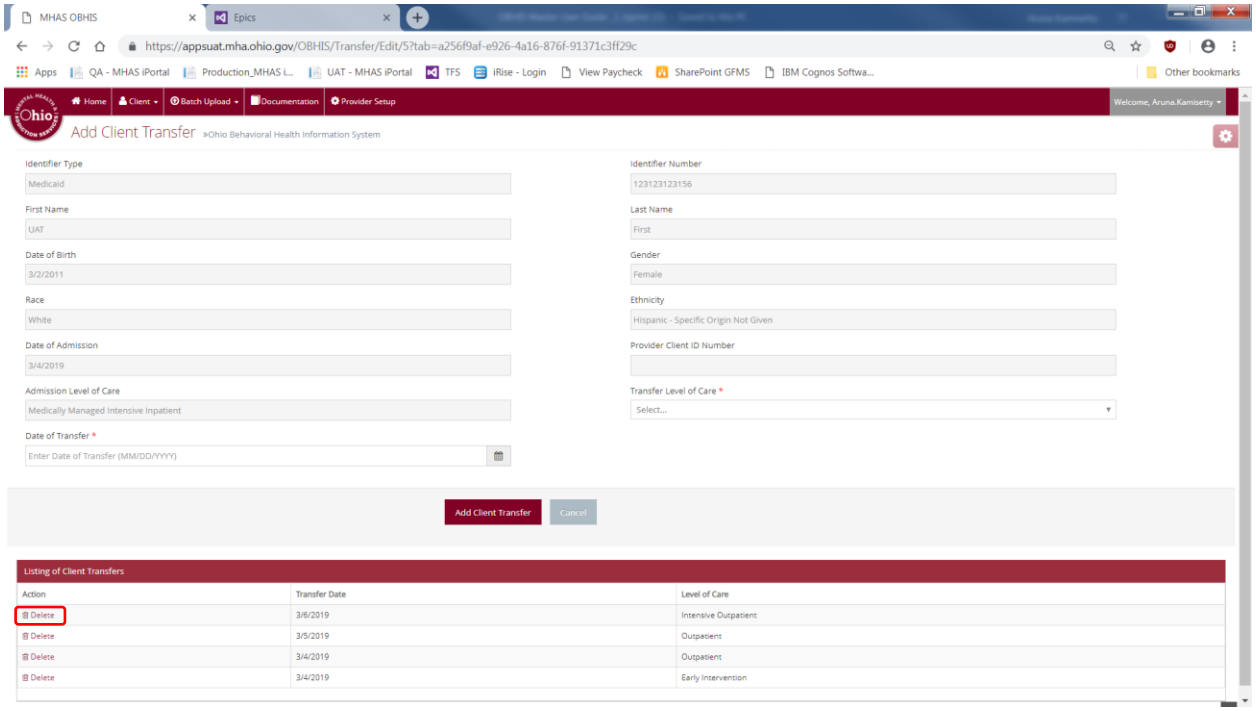
Roles: Provider Admin, Provider User and Third-Party Vendor able to Delete Transfer.

1. Perform a “Search” for the Client record.

2. Click on the Create/View link to Add Client Transfer.

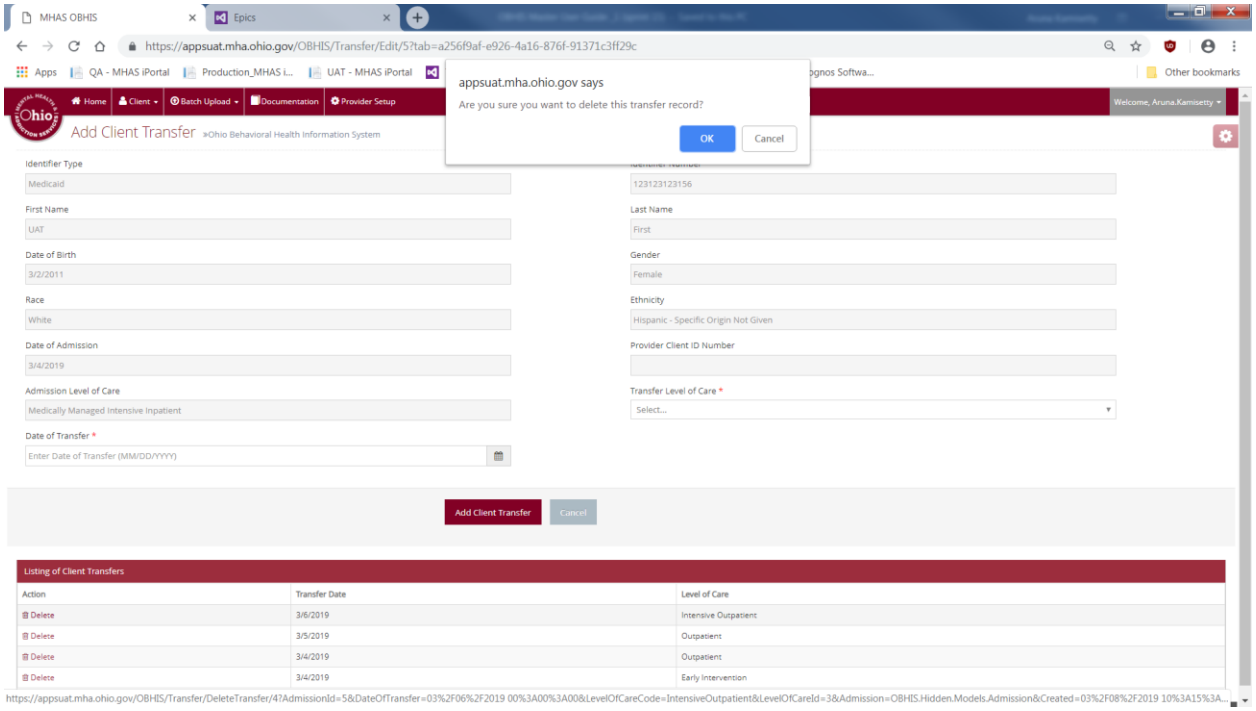


3. The "Add Client Transfer" screen will appear, listing the Client information at the top of the screen.
4. In the "Listing of Client Transfers" table, select the Delete link.



5. A window will appear to validate that the user wants to delete the Transfer record.

6. If OK is selected, the Transfer record will be deleted.

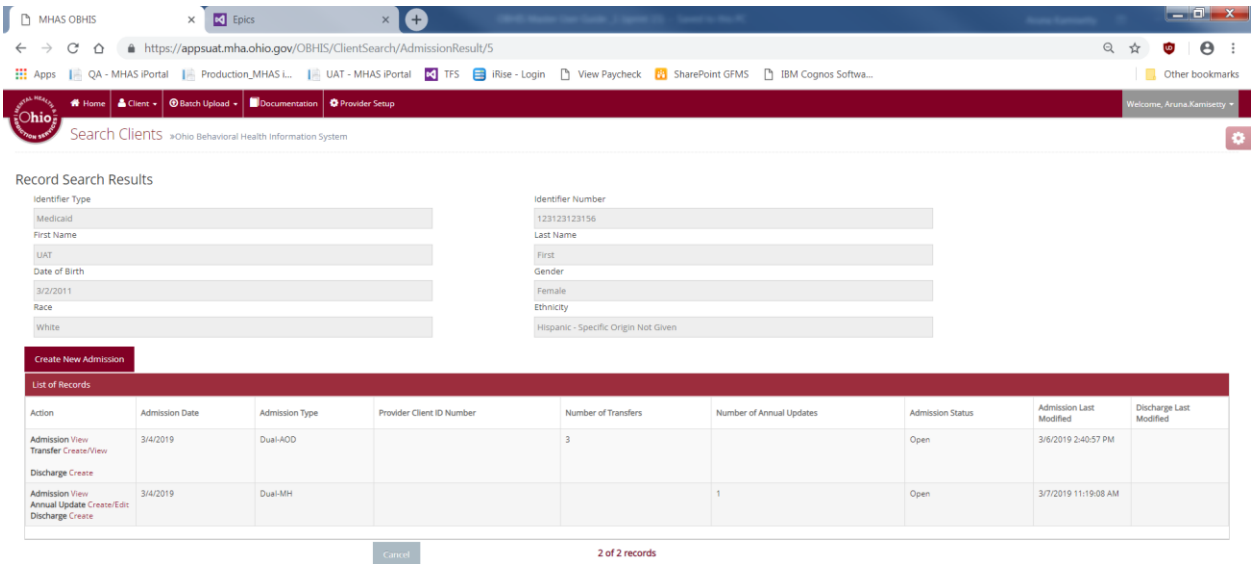


Discharge

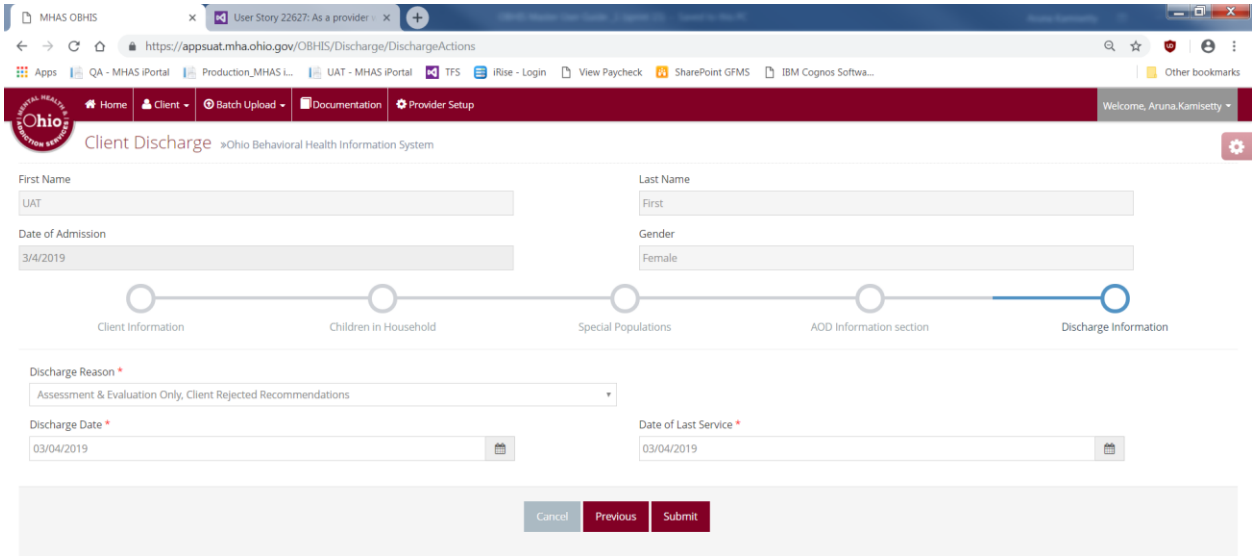
Create Discharge

Roles: Provider Admin, Provider User and Third-Party Vendor are able to Create Discharge records.

1. Perform a "Search" for the Client record.
2. On the "Record Search Results" screen, in the "List of Records" table select the Create link next to the appropriate Discharge record.



3. The “Client Discharge” wizard will appear.
4. Complete the required information on each screen and select the Previous, Save and Finish Later, or Next button based on action
    a. Client Information screen
    b. Children Household screen
    c. Special Population screen
    d. AOD and/or MH information screen
5. Complete the required information in the “Discharge Information” section of the wizard, which is the last screen.

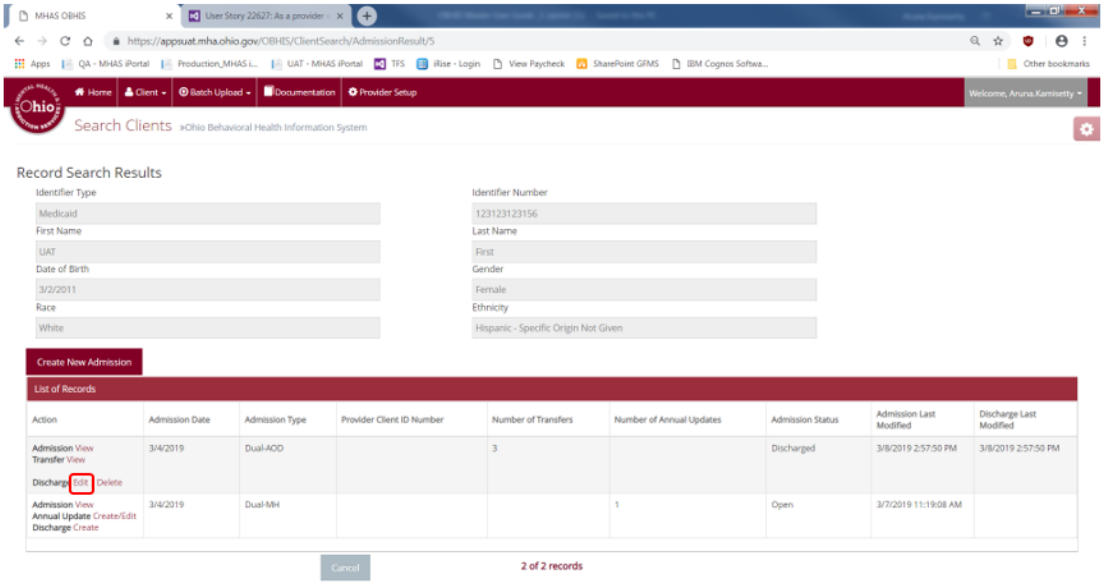


6. Select the Submit button, and the discharge information will be submitted to OhioMHAS.

Edit Discharge

Roles: Provider Admin, Provider User and Third-Party Vendor able to Edit Discharge

1. Perform a “Search” for the Client record.
2. On the “Record Search Results” screen will display.
3. In the ”Listing of Records” table, select the Edit link next to the appropriate Discharge record.

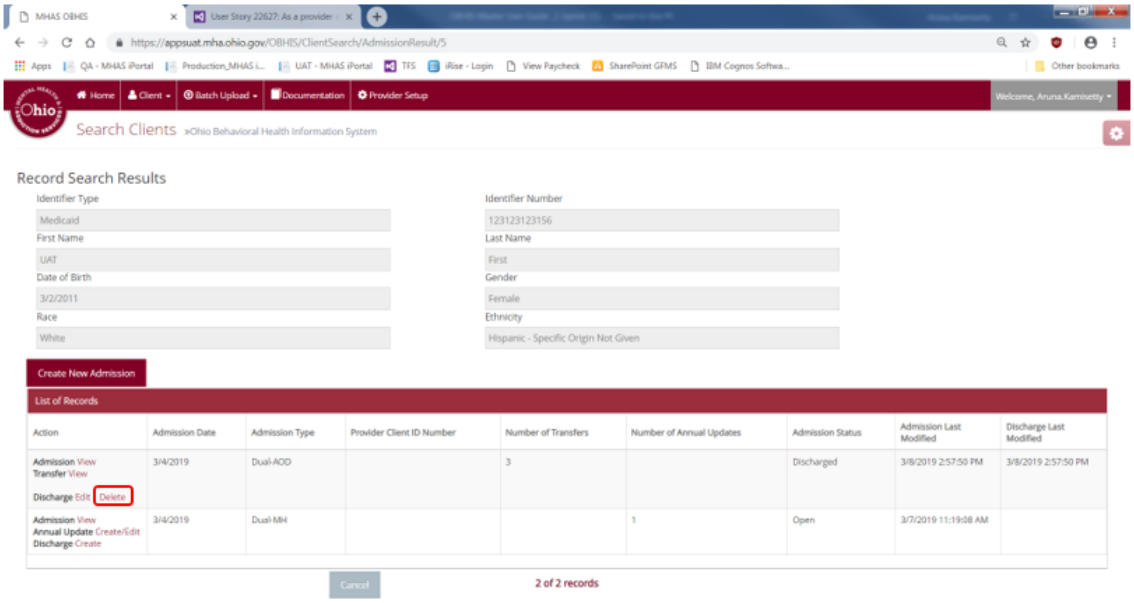


4. The “Client Discharge” screen will appear, listing the Client information at the top of the screen.
5. Make any changes to the various sections of the discharge record and select the Submit button on the last screen of the discharge wizard.
6. The edited discharge information will be submitted to OhioMHAS.

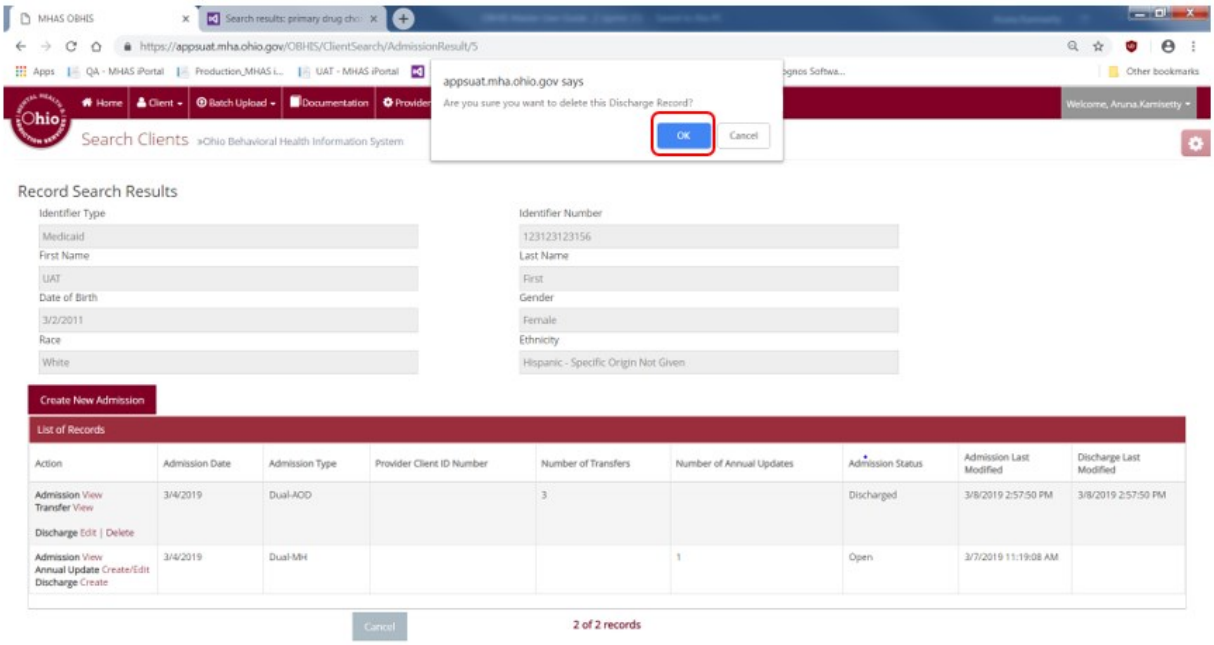
Delete Discharge

Roles: Provider Admin, Provider User and Third-Party Vendor able to Delete Discharge

1. Perform a “Search” for the Client record.
2. On the “Record Search Results” screen will display
3. In the “Listing of Records” table, select the Delete link next to the appropriate Discharge record.



4. The system will generate the validation message "Are you sure you want to delete Discharge Record?"



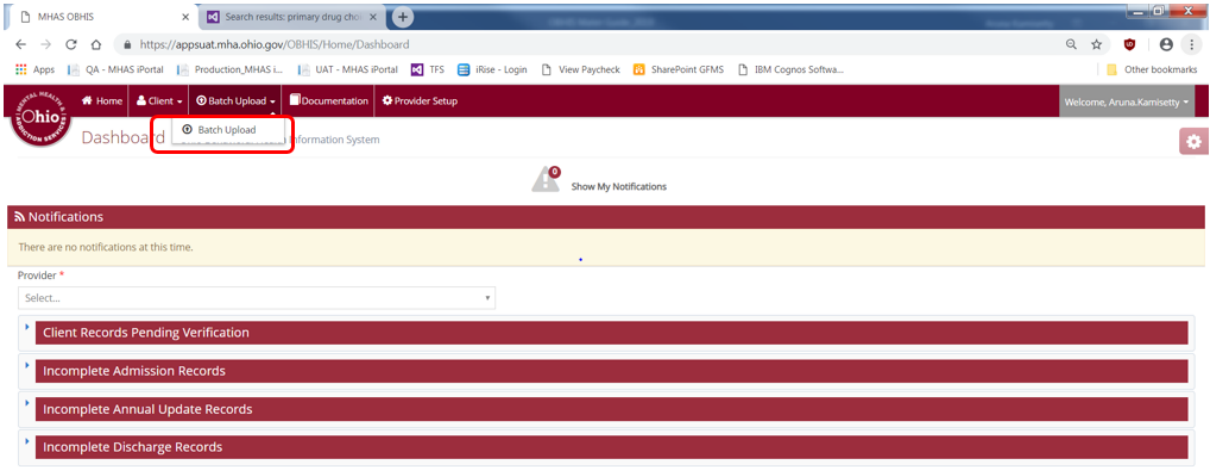
5. Select OK, and the Discharge record will be deleted

Batch Upload Tab

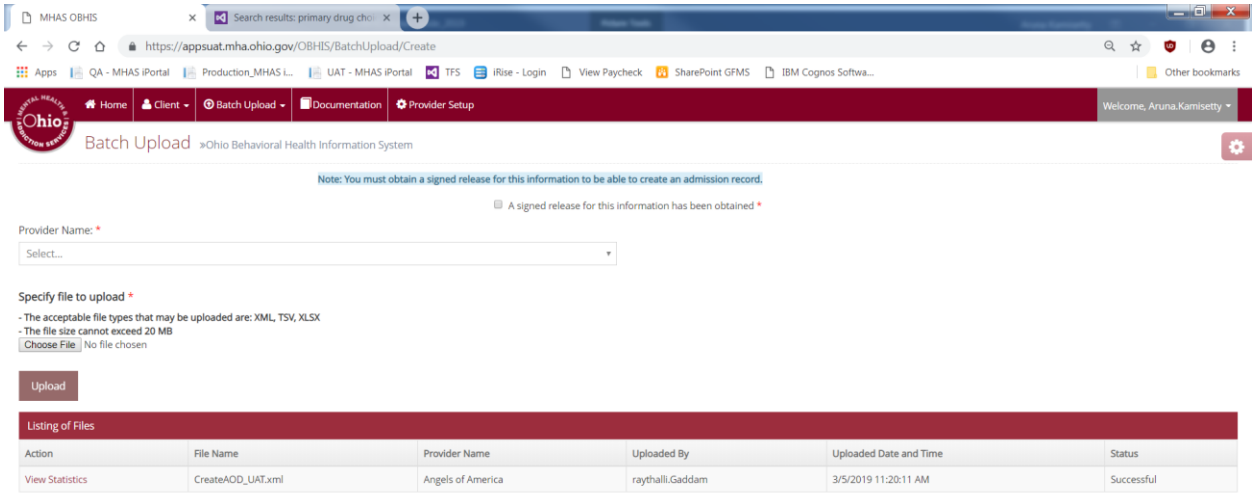
Upload file

1. In the top Navigation Bar, under the "Batch Upload" tab, select the Batch Upload link.

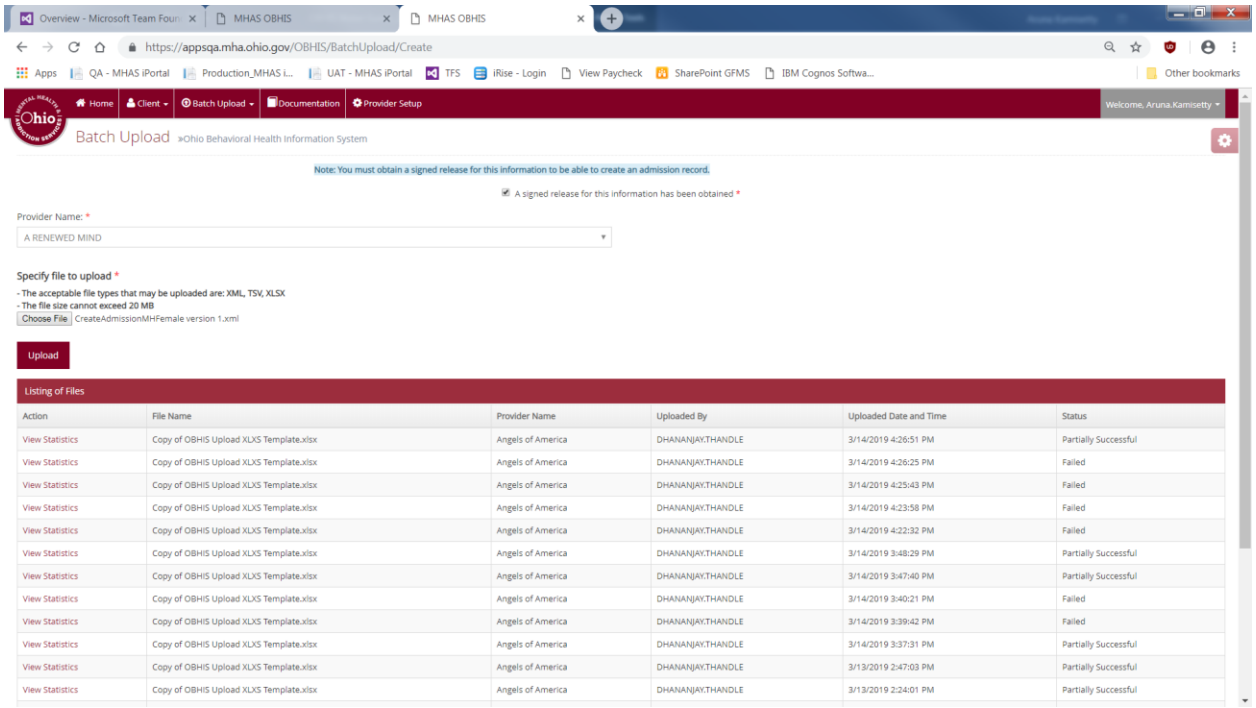
Roles: Provider Admin, Provider User and Third-Party Vendor have access to Batch Upload Link



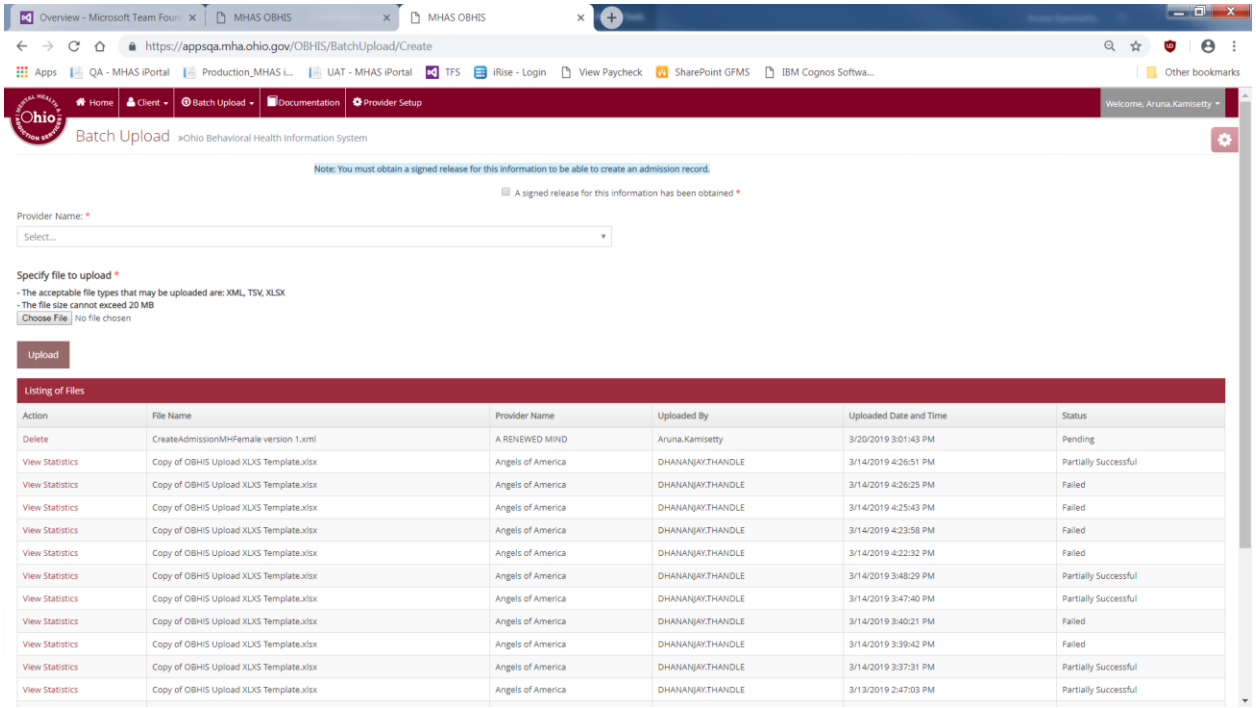
2. The user will be taken to the "Batch Upload" screen.



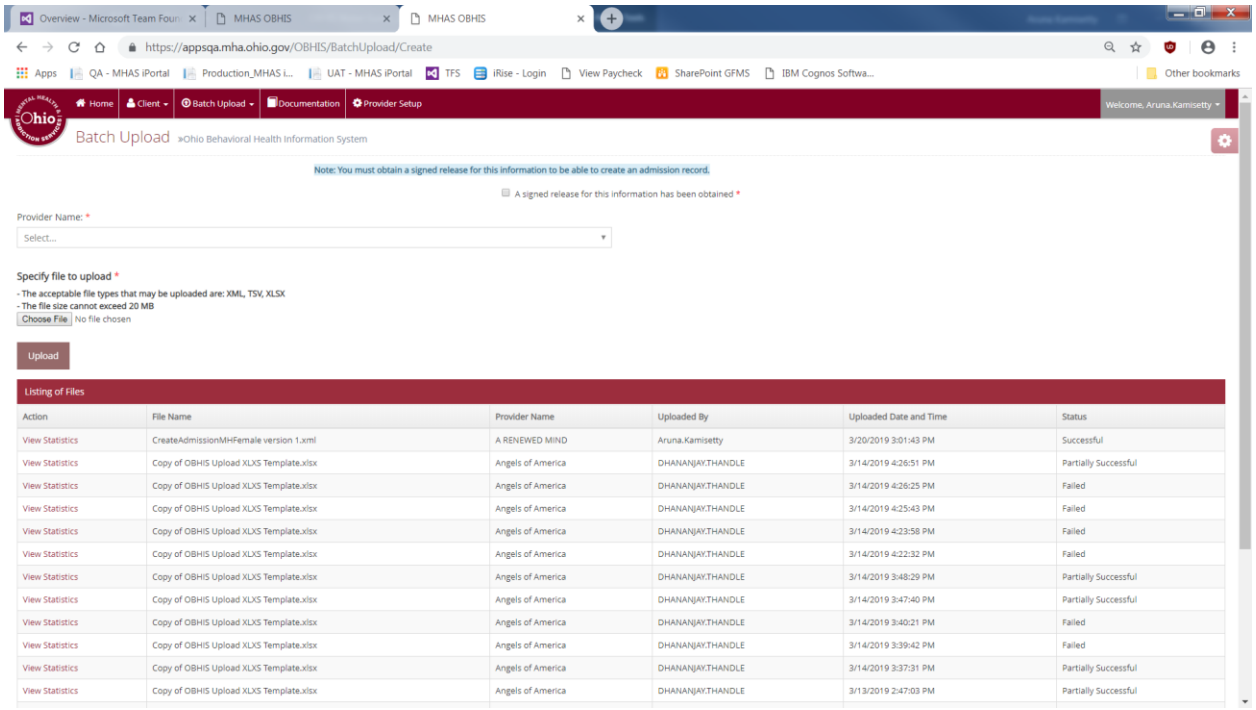
3. The User must check the box indicating that there is "A signed release for this information has been obtained."
4. Select a "Provider" (if applicable) and then to upload the batch file,
5. Click the <u>Choose File</u> button.
6. The user will be taken to their organization's computer/network file libraries.
7. Select the file from the library and click on the <u>Open</u> button and the uploaded file will display on the screen. The <u>Upload</u> button will be enabled.



8. Click Upload button on the "Batch Upload" screen.
9. The batch file that was uploaded will be displayed in the "Listing of Files" table.
10. The file status will be in Pending status, and a Delete link will be displayed under the "Action" section

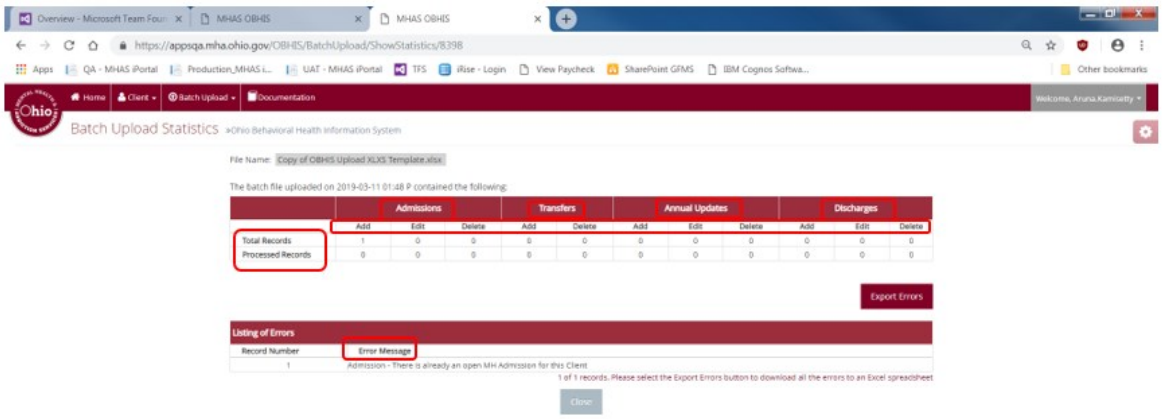


11. Batch status will be change to Successful once file processed. It would take few minutes.
    - Click F5 or Refresh button. Status will change to 'Successful'
12. The View Statistics link will display under the Action



View Statistics

1. Click on View Statistics link, the user will navigate to Batch Upload Statistics page.
2. Batch Upload Statistics page display the following details for that file:



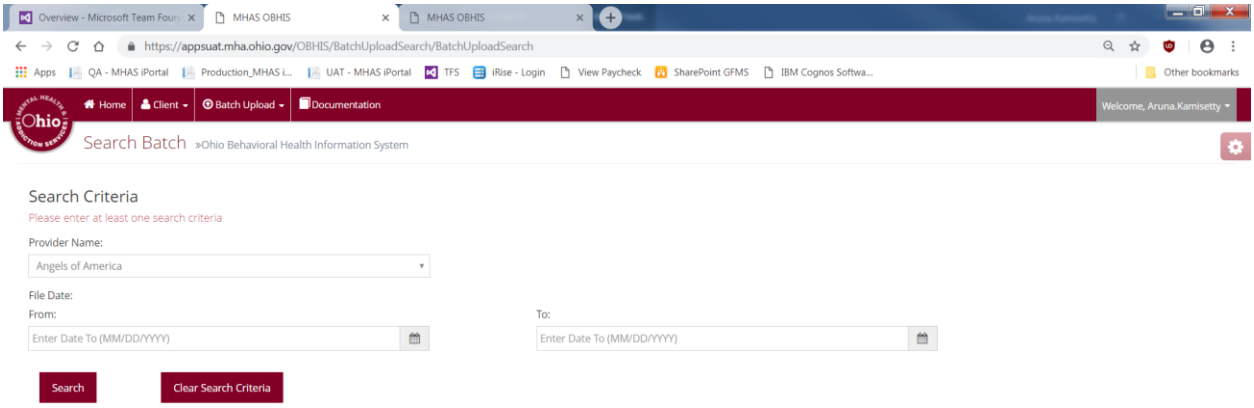
3. There are four sections:
    a. Admissions
    b. Transfer
    c. Annual Updates
    d. Discharge

4. Each section has three categories
    a. Add
    b. Delete
    c. Edit
5. Display number of “Total Records” are processed for each category, each section.
6. Display number of “Processed Records” are processed for each category, each section.
7. All errors messages with Record Number related to that file listed in “Listing of Error” table.

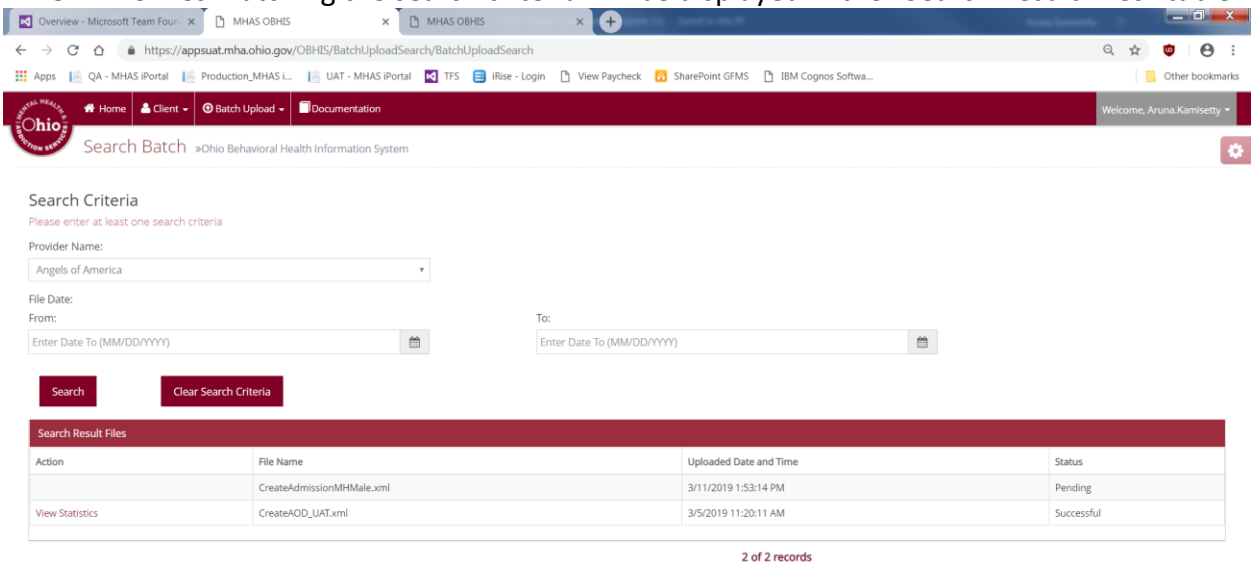
Search Batch

This function is for the OhioMHAS Business Administrator only. The Provider User, Provider Administrator and Third-Party Vendors will not see this selection under the Batch Upload tab.

1. In the top Navigation Bar, under the “Batch Upload” tab, select the Search Batch link.
2. On the “Search Criteria” screen, enter at least on search criteria and select the Search button.



3. The files matching the search criteria will be displayed in the “Search Result Files” table.



4. To begin a new search, select the Clear Search Criteria button and enter the new search criteria.

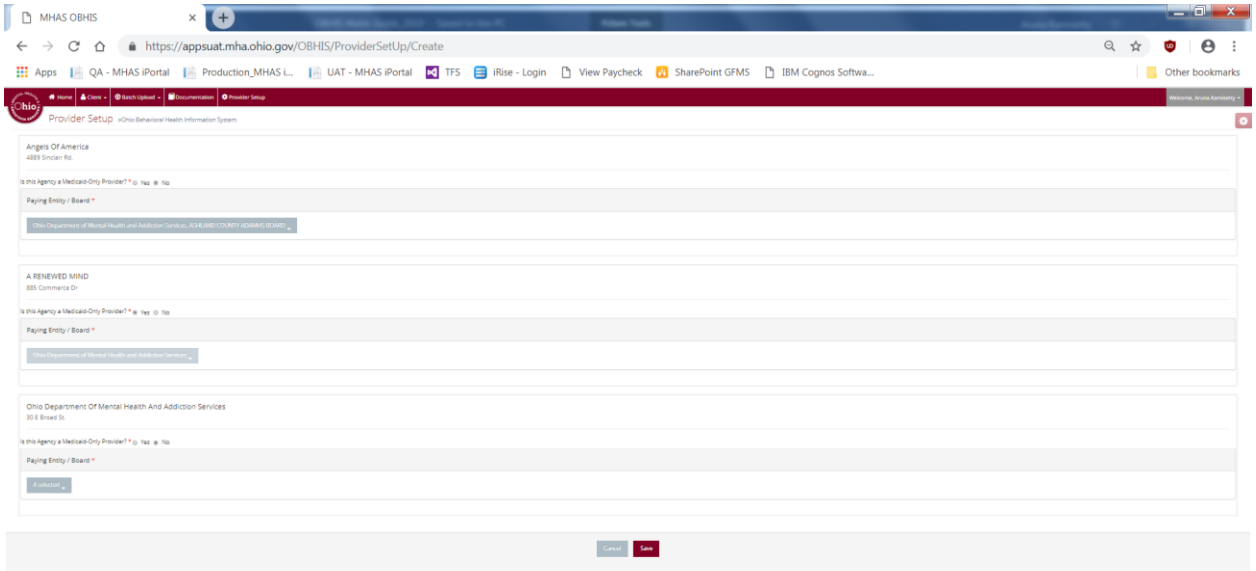
Documentation Tab

In the top Navigation Bar, click on the "Documentation" tab. The user will navigate to OBHIS Documentation page. This page contains:

- XML schema examples for Admission, Discharge, Annual Update and Transfer
- Excel Template
- File layout of TSV format
- XML Schema Definition for Upload
- User Guide
- Business Rules

Provider Setup Tab

1. In the top Navigator Bar, Provider Setup link is displayed.
2. Click on Provider Setup link and Provider Setup page will be displayed.
3. Provider Admin and OhioMHAS Business Administrator have access to "Provider Setup" page.
4. Provider Setup page will display only the providers with whom the user is associated.
5. If "Yes" is selected as the answer to the question, "Is this Agency a Medicaid-Only Provider?", the Paying Entity/Board will be "Ohio Department of Mental Health and Addiction Services" by default.
6. If "No" is selected as the answer to the question, "Is this Agency a Medicaid-Only Provider?", the Paying Entity/Board must be selected from the drop-down list.
7. When the user wants to change the Paying Entity/Board:
    a. The question "Is this Agency a Medicaid-Only Provider?" selected "No"
    b. Paying Entity/Board should be unselected from drop-down list
    c. Select correct Paying Entity/Board from drop-down list
8. The user needs to click on Save button once entered the appropriate changes.


MHAS OBHIS
https://appsuat.mha.ohio.gov/OBHIS/ProviderSetUp/Create
Apps
QA - MHAS iPortal
Production_MHAS i...
UAT - MHAS iPortal
TFS
iRise - Login
View Paycheck
SharePoint GFMS
IBM Cognos Softwa...
Other bookmarks
Home
Client
Batch Upload
Documentation
Provider Setup
Welcome, Aruna.Kamisetty
Provider Setup
»Ohio Behavioral Health Information System
Angels Of America
4889 Sinclair Rd.
Is this Agency a Medicaid-Only Provider? * Yes No
Paying Entity / Board *
Ohio Department of Mental Health and Addiction Services, HIGHLAND COUNTY ADAMHS BOARD
A RENEWED MIND
885 Commerce Dr
Is this Agency a Medicaid-Only Provider? * Yes No
Paying Entity / Board *
Ohio Department of Mental Health and Addiction Services
Ohio Department Of Mental Health And Addiction Services
30 E Broad St.
Is this Agency a Medicaid-Only Provider? * Yes No
Paying Entity / Board *
0 selected
Cancel
Save

Appendix