

CMBHS User Teleconference

August 13, 2013

DSHS Staff Introductions

- Kevin Davis, Chris Meengs, Brenda Briseno, Wendy Cook.

Announcements & Updates

- **Chris – Project (Currently in Development)**
 - We are ready to deploy the new Mental Health (MH) functionality on schedule, which means that CMBHS has scheduled down time August 31 through September 1, which is a weekend. We will put up a notice on the banner page. It is possible that the data migration from CARE, the current MH system, will not take all the time allotted, so CMBHS may be back up some time on September 1.
- **Kevin – Production (CMBHS Currently in Use)**
 - **Optimization:** We've been working on optimization of screens to improve overall speed of the system, since the last call we introduced optimization to the client workspace screen, progress notes, pending claims, and day rate attendance, so hopefully you're seeing improvement in how quickly those screens are loading. This follows some other optimization that we've implemented to other screens earlier in the year.
 - **Performance Measures Report:** In addition to that, in one of our calls within the last few months a provider asked that we add a performance measures report. I talked with the data analyst working on that, and he let me know that would be ready within the next couple of weeks. We know this is something people have been asking for, it will be available within the report screen, and we'll let you know when it's available. This will allow you to track your progress with your performance measures.
 - **Client Profile Screen:** As we prepare for MH deployment, we are adding functionality to the current system to support MH providers. The most visible thing, for Substance Abuse (SA) providers, will be changes to the client profile screen. Some data is being moved around, some things are being added, but nothing is being removed. We are putting a list together and will get that to you as soon as it's complete.
 - **Consent Function:** After MH Deployment, *with client consent* you will be able to release information from substance abuse providers to mental health providers, and vice versa, using our consent function. This isn't something we've had in the past. There aren't as many MH screens as SA screens. MH screens that will be available are primarily diagnosis and assessment, but MH and SA providers will

still be able to share the information in CMBHS between themselves with this function - provided that permission is granted by the client.

- **CARE and CMBHS:** To prepare for the MH deployment, including the consent function for record sharing, we're doing several things: There's an existing system for MH, CARE, and we are migrating some of the data from CARE data into CMBHS, which is why CMBHS will be offline for a couple days at the end of the month. We're migrating all the client profile data, and the assessment and diagnosis data, from CARE to CMBHS. Some of the clients in CARE exist in CMBHS already, and when possible we're matching records between CARE and CMBHS and putting them under same client number. That will be a reference point - this won't change your ability to see information without consent – if you didn't provide the service, if you didn't have access to the record before, you won't have access to it after this process is complete.
- **Data Merge/Cleanup of Duplicate CMBHS Client Profiles:** In addition to bringing in data from CARE, we need to do a cleanup of data within CMBHS by consolidating duplicate profiles prior to MH deployment. The evening of August 24 we will merge duplicate client profiles. You will not see any change from your perspective other than one single change: Client profile numbers will change in some instances, some numbers will be eliminated. This doesn't mean the number is completely lost – if you're accustomed to looking things up by a specific client number, you'll still be able to type in the number you've been using to pull up the client record, but it might then display the new CMBHS client profile number instead of the one you used to access the information.
- **CMBHS Global Client Index:** We will have a global client index in CMBHS. After MH deployment, the only thing you'll be able to see here is client profile data such as name, SSN, address, and so on, unless you've provided services before and have their records in your system or if you have a client consent on file so that you can see the records of another provider. What that means is that we will have one master list of all clients entered into CMBHS, including Mental Health, Substance Abuse, NorthSTAR, some Medicaid data; everyone listed in CMBHS will not necessarily have received SA or MH services in the past. This will not present opportunities for release of protected client information, but it will cut down on number of duplicate client records system wide. We will have more info on this coming very soon, because this happens at the end of the month.

Q&A/Open Discussion

Janet
Texas Council

If a client profile is created in two separate locations, what happens? Is that automatically synced, does it come up automatically, or what?

- **Kevin:** CMBHS makes you do a search before you enter a client. If you have the right information and do a search then hopefully you will see that client in the results and use the existing profile. If you use the same name, date of birth, gender, SSN, and so on, you should get a notice that the client appears to exist, and then you have the option to either create a new client or use the existing client profile if it is an accurate match. Once again, for clients new to your organization, you will not have access to clinical records unless you have created them, or you have already received client consent to access the records created by another provider.

Female caller from Sherman, TX

So, when we find their name, we just do it like we always have, and if there has been a change in address, phone, or whatever, we go in and we don't change the date of the profile, I guess, but we would change anything like their address that needed updating?

- **Kevin:** That's correct. You should never change the client profile date when you're updating a client unless it's right after you created it and you realize you've put in the wrong date.
- **Caller:** *I have been changing it because I thought it was a new episode.*
 - **Kevin:** You should find the client already existing – there will be a lot of records in the system - then when you open the record up and you see information has changed like their phone or address, you update that info at that time and then use that profile.

Frank

Denton County

Will we be able to search on a local case number?

- **Kevin:** Yes. I was actually just reviewing that with our business analyst before this call to be sure it works.
- **Frank:** *The functionality doesn't exist right now?*
 - **Kevin:** Correct, but it will in a few days.

Linda B.

Brazos Place

I'm ecstatic that we'll get our performance measures in a report, thank you.

- **Kevin:** I think it is thanks to your requests that this reporting feature was built. We will post an announcement on the login page when it is available, I was assured this morning that it will be any day now.

Jim and Robert

Gulf Coast Center

How is CARE going to interact with CMBHS, specifically with batching?

- **Kevin:** That is a good question. MH providers are accustomed to batching information in to CARE right now. CMBHS will support the batch function as well, you are not required to do anything new, you are just sending in the same client registration batch data that you have always been sending to CARE if you're a MH provider. The data you submit will go to a central repository, and CMBHS and CARE will both pull the information from there. CARE isn't dead, CMBHS is just taking over the assessment function at this point, and over the next few years we'll be migrating more from the CARE system into CMBHS. In the meantime, the CARE system is the system of record for MH and IDD data, so CMBHS and CARE will both read the registration file and create client profiles. CMBHS and CARE will sync every evening, so if an MH profile is created in CMBHS online, we'll send that to CARE and it will then be created in CARE as well, and vice-versa. SA batching isn't supported, so if a client profile is created at a SA provider location it won't go to CARE.
- **Robert:** *As far as batching to CARE goes, the process will remain unchanged?*
 - **Kevin:** It will for that, but providers batching in MH assessments, they can only batch in to CMBHS and the process will be a little different, Chris can tell you more about that if you want her to.

Linda B.
Brazos Place

Since the assessment is what eventually generates the treatment plan, when this rolls over with mental health in place are those treatment plans affected in any way?

- **Kevin:** No, MH and SA assessments are completely different. Do you do both MH and SA at your facility?
- **Linda:** *We provide SA treatment and we deal with those with MH issues through Gulf Coast Center*
 - **Kevin:** In SA, when an assessment is done, when client consents for release to another provider, in many cases that second provider can use the assessment to generate a treatment plan. When we had residential authorizations and OSARs were doing those assessments, that was a common practice. Now, even though with client consent you'll be able to get a MH provider to release the MH assessment to you, the MH assessment can't be used to generate an SA treatment plan.
- **Linda:** *Maybe I'm getting confused...with COPSD, with Gulf Coast Center, we basically work off the same treatment plan for our COPSD clients. And so if not Gulf Coast Center, with another center, would we be able to see their treatment plan so we can coordinate those two things?*
 - **Kevin:** The COPSD providers will still function the way they've always functioned in CMBHS. We haven't implemented – and I don't know if there's a plan to implement treatment plans for MH in CMBHS - those aren't captured in CARE, so you'll be working with the same treatment plan as always.

Janet

Texas Council

So when the record comes up, say you don't have authorization to see that someone else is treating them, will the record show the provider so that you can coordinate to share records?

- **Kevin:** No. If I contact a center and say I have a record at a specific SA provider and can they share the information on their end...without the client's permission this is a violation of 42 CFR Part 2 and HIPPA. You still have to rely upon the client to tell you they've received treatment at a different provider. The way we have arranged this is the way we have to do it to be in compliance. I understand what you're going for; if you had a way to know that information, about where the client had been previously or if you had access the record without client consent, it would be helpful for you but that would be illegal.
- **Janet:** *So you see a record was created but you can't see who it was created by... sometimes the client can't remember where they've been before. If they can't remember who created it and all that....*
 - **Kevin:** Yeah, I know, it's one of the limitations of working in the SA field.
- **Janet:** *Can you tell on the DSHS end that someone is using more than one service provider at a time, like, does that show up in your system, do you have a way of catching that?*
 - **Kevin:** As the oversight agency, DSHS does have a way to know that, but that does not mean I can tell you or have to tell you.
- **Janet:** *I understand, I am concerned about someone getting multiple prescription medications from multiple places.*

Marsha

Gainesville State School

The downloadable form doesn't match what's available online in CMBHS.

- **Kevin:** The PDF that you can print?
- **Marsha:** *Yes, some questions are left out.*
 - **Kevin:** The printed version has all the possible questions. CMBHS only displays certain questions under certain conditions.
- **Marsha:** *When you change your client profile form, are the downloadable documents updated too?*
 - **Kevin:** I'm going to need to follow up with that, could you call the CMBHS help line and start a ticket with them?
- **Marsha:** *I will.*
 - **Brenda:** Marsha, were you talking about the blank forms not being the same?
- **Marsha:** *Yes, there are some extra questions that aren't on the download, it would be helpful if we could get them to match.*
 - **Kevin:** We'll definitely look into that.

Kevin: Any more questions?

Kevin: If we don't have any more questions, we'll wrap up the call. We will be posting information on the login page and in the release notes, as well as making documents available

in other ways. Remember, CMBHS will be offline to all users August 31 and September 1, it may not be quite that long but we want you to be prepared for CMBHS to be offline both days. This is a holiday weekend so we hope it will be a minimal interruption to your workflow.

Call ended at 10:32 AM

The September 2013 Teleconference will take place on Tuesday, September 10, 2013 beginning at 10 AM Central. Please join the call promptly as some calls are brief. Information about the call, including tips for callers, may be found at <http://www.dshs.state.tx.us/cmbhs/teleconferences.shtm>. Please direct any general questions to cmbhs@dshs.state.tx.us. For current users with specific, technical questions or issues to report, please call the CMBHS Help Line at 1-866-806-7806. The Help Line is staffed Monday through Friday from 8 AM - 5 PM Central. Please note that the Help Line is closed after hours and on holidays. Should you encounter problems after hours or on a holiday, your call to the Help Line will be routed to a pager. Please enter your number and your call will be returned as soon as possible on the next business day.