

# **MENTAL HEALTH MIS**

# ASSESSMENTS

## THERAPEUTIC FOSTER CARE





Live Well San Diego

## County of San Diego Behavioral Health Services



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This handout contains screen shots of confidential and proprietary information for view only. It shall not be copied or shared for anything other than its intended purpose as a training device for the County of San Diego, Mental Health management Information System.



### CONFIDENTIALITY

#### HIPAA regulations mandate that <u>all</u> client information be treated confidentially.

Access to CCBH is based on your position and your job classification. You will have the access you need to complete your job duties. This can include access to clients in your Unit/SubUnit or may include full client look up. Remember – with more access comes greater responsibility regarding confidentiality!

You are <u>not</u> to share passwords with other staff. The Summary of Policy you signed before receiving your access to CCBH included your agreement to this directive. You are still responsible if someone with whom you have shared your password violates confidentiality!

The MIS unit investigates any suspicions regarding sharing of passwords. Consequences are up to, and may include termination.

Do not open any active client charts unless instructed to do so, or if it is required to complete your job duties. "Surfing" clients is a blatant breach of confidentiality.

Remember you are personally and legally responsible for maintaining confidentiality. Take it seriously.

Do not leave your computer unlocked with client data on the screen for others to access or view while you are away from your desk. Lock your CCBH session before leaving your computer.

When printing, make sure you are printing to a confidential printer, and pick up your paperwork quickly. Leaving printed Protected Health Information (PHI) out is also a confidentiality violation.

Play it safe – keep in mind how you would want your own PHI handled!





### CCBH SOFTWARE BASICS

- CCBH IS ACCESSED THROUGH CITRIX (Cerner): Go to <u>https://cosdca.cernerworks.com</u> (Save this to your favorites or create a shortcut for your desktop)
- "TAB TO TRAVEL": Get in the habit of using your "Tab" key. Using the "Tab" assures that you are directed to all required fields and that the information you input is actually captured by the system.
- RIGHT CLICK: When there is no obvious way to add information into a field, right click in the space to view your options.
- FILTERS/RADIO BUTTONS: Check these first and make sure they are on "all" when searching the database.
- MAGNIFYING GLASS/ELLIPSES "BUTTONS": When you see these at the end of a field, it means there is a "Search Screen" that you can pull up to find information for that field. You do not have to use them, but they are there if you need them.
- REQUIRED FIELDS are in red or blue: They must be filled-in to save and final approve information.
- OPTIONAL FIELDS are in white: Information may be added, but is not required to final approve the Assessment. Keep in mind – just because you have completed all the fields required to final approve the form, does not mean you have completed a thorough clinical assessment. Documentation standards have not changed.
- CLOSED FIELDS are in gray: Nothing can be added in these fields.
- CASE SENSITIVE:
  - Passwords if you receive an error message for "Invalid Password", check to make sure you are using the appropriate upper and lower case letters when typing. After a third attempt with an invalid password, the system will lock your session and will require contacting the Optum Support Desk (1-800-834-3792) to unlock it.
  - Table Searches when searching within a table, be aware that descriptions or IDs are case sensitive. If you do not use the correct upper or upper and lower case entry, the search will not take you to the desired table value.
- MULTIPLE WAYS TO ACCESS INFORMATION: In CCBH, it is easy to access the same information in multiple ways. We have included screenshots and directions in this document to guide you through the system.

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 LOCKING YOUR SESSION: For security purposes, you must lock your session any time you step away from your computer. This packet explains the various ways to lock your session.

Note: Locking your session is best used for short times away from your computer. CCBH will log you out after 60 minutes. There is a chance of losing work that has not been final approved or saved if CCBH logs you off.

- WHEN YOU GO BACK TO YOUR PROGRAM: You are learning how to enter assessments in the "SDC Train CCBH" environment during this training, which is for practice purposes only. It is important to enter all of your assessment information in the "SDC Live CCBH" environment when you return to your program.
- For password resets/menu issues: Call the Optum Support Desk. You may also call if you need your "SDC Live CCBH" environment password or menu set up. Their contact information is:

#### Optum Support Desk 1-800-834-3792

#### **Reminder:**

Menu access is set according to job title/functions. The menus you have at your program may look different than menus shown in the screen shots in this packet.



## **CCBH SPEAK**

Assessment	In CCBH, anything that is not a Client Plan or a Progress Note is considered an "Assessment." So, in CCBH Speak, forms such as the Discharge Summary, Outcome Forms, and Demographic Form are considered "Assessments" as well as the actual clinical assessment forms.
Clinician's HomepageA "page" that provides the Clinical servers at each open as view client/s and client information for the identified caselo screen. This includes client look up, caseload listing, appoint task/s to do, notifications, and other client information present EHR.	
Collateral Server	Co-Staff providing a service (i.e. co-facilitator). Used when more than one staff is providing a service to the same client, on the same date and at the same time as server.
Demographic	A client is entered into the EHR by the completion and final approval of the demographic form. A client may not be opened to assignment/program unless the demographic form is entered, completed, and final approved.
Final Approve	Locks the completed assessment. Prevents editing/deletion of assessments.
SAI – Single Accountable Individual	Primary server identified based on primary unit program set up. This staff will be listed as the primary contact for the client in the system of care for purposes of coordination of care.
Service Code	Procedure Code. The code data entered into the EHR for the purpose of claiming a service activity.
Server	Staff providing a service activity.
Unit	The Physical Location of a program, or legal entity.
Sub-Unit	The specialized set of services offered within a Unit (i.e. population, funding sources, etc.).



### PASSWORD CHANGES

### Citrix (Cerner) Password

The first Citrix (Cerner) password you ever receive is considered a temporary password. For security reasons, you will be prompted to change your password on your first log in. To do so after the initial login, click "Change Password" when first logging in to Citrix (Cerner).

⊖ Cerner	Change password Q
Change Password User name: COSD_CA\anasazigen10 Old password: New password: Confirm password: OK Cancel	Next, follow the prompts to change your password.

#### **CCBH** Password

You are prompted by the system to change your CCBH password every 90 days. However, if you feel that someone has learned your password, for security reasons you should change it immediately. There are two ways to do this:

7

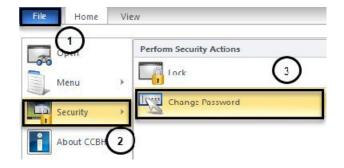
#### **External View**

File	Access	Scheduler	Client Assign	
O Lock Session				
	Chan	Change Password		
	Mana	ge Security (	Questions	

From the External View, go to the "Access" tab and select the "Change Password" option. Follow the prompts to change your password.

#### **Clinician's Homepage**

From the Clinician's Homepage, go to the File Tab. Select the "Security" menu, and then select the "Change Password" option. Follow the prompts to change your password.



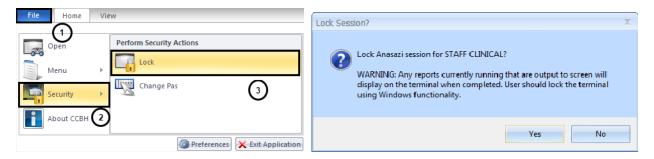


### LOCK CCBH SESSION

For security reasons, the expectation is that you will lock your CCBH session any time you step away from your computer. There are two ways to do this.

#### Clinician's Homepage

From the Clinician's Homepage, go to the "File Tab" and select the "Security" drop down menu, then select "Lock Session" button.



### **External View**

From the External View, go to the "Access" tab and select the "Lock Session" option.



You will be prompted to enter your password to unlock the session.

Ð	This Anasazi Session has been locked		
	This Anasazi Session is in use and has been locked. Only the Staff member who locked this session may unlock it		
	Password:		
	OK Cancel		



### **EXITING THE APPLICATION**

EXITING CCBH: To make sure you do not accidentally create a "ghost session" and lock yourself out of accessing CCBH, you must exit in the following manner: <u>Clinician's Homepage</u>

- Go to the "File Tab" menu in the top left-hand corner of your screen.
- Select the "Exit Application" option.

File	Home	View
	Open Open	
	Menu	•
	Security	•
	About CCBH	2
		Preferences 🗙 Exit Application

#### **External View**

- Go to the "File" menu in the top left-hand corner of your screen.
- o Select the "Exit" option.
- Repeat this step for any open external view window.

T3 S	cheduler (Staff: CLINIC	AL, STA	FF)	
File	Access Client Data	ATP	Sched	luler
	Clear/Add		F5	۰ 🔊
	Delete	Shift	+ F2	
	Save		F2	
	Prompt		F4	
	Close Active View		F3	
	Exit	Alt	+ F4	
	LL 4	0.000.0	104.01	

You risk being locked out of CCBH if you do not exit in the manner described above!



## CLINICIAN'S HOMEPAGE PREFERENCES

How to setup and save preferences

#### **Accessing Preferences:**

File Home	View
Open Open	
Menu	•
Security	•
About CCBH	
	Preferences 🔀 Exit Application

- A- From the "File Tab"
- B- Select the "Preferences" icon

This feature allows you to set the Assessments that you use most frequently as preferences for easy access.

#### **Preferences for New Assessments:**

- o Select the plus sign next to "New Assessments."
- o Click "Commonly Performed Assessments"
- o Click "Add"

20			Staff Preferences (TRAIN)
File Staff Prefe	erences		
Save Save and A	dd Remove Refresh Dele Select	ete Close	
Save	Grid Actions	Close	
Preferences	Curre	ently Viewing I	formation for Commonly Performed Assessments
Auto Restore     Client Panes	Com	monly Perform	ed Assessments
New Assessments	["]	D]	Descripton
Common y Perform	ned Assessments		
New Progress Notes			
- New Client Plans			
- Pharmacies			
StaffPanes			

_	=	

 Select the assessment(s) *you* commonly perform. To select multiple assessments, hold down the "control" key as you click with the mouse.
 Once you have selected your preferred assessments, click the "Select" button.

	raa marapie rosessmento as ee	mmonly Performed Assessments (TRAIN	•/
File Multip	le Selections		
S 🔽 🛯	S 🔍 📐 🗔		
efresh All In	vert Search Select Close Panel		
Ac	tions Close		
Select each Ass	essment to be added to the list of Comm	only Performed Assessments.	
vailable Assessme	ents (Filters Applied)		
•	and the second se		
D	Туре 🔺		Active
AIMS	AIMS		
SOCA	ASO Clinical Addendum		
HAC05	BHA 0-5 Children		
ЗНАА	BHA Adult		
HAC	BHA Children		
BHACSU	BHA Crisis Stabilization Unit		
BHADEC	BHA Dev Eval Clinic	Wester Hall damme the	
HAESU	BHA ESU	Hint: Hold down the	
HATBS	BHA TBS	control key to select more than one option	
CANS CONFI	CANS Sharing Confirmation	than one option	
FARS	CFARS		
CPCONP	Client Plan Confirmation Page		
IFC	Daily TFC Progress Note		2
)EM	Demographics Form		
DIA.G	Diagnosis Form		
DIAGREC	Diagnostic Reconciliation		
DCSUM	Discharge Summary		
DSM5RECON	DSM-5 Diagnosis Reconciliation		
ATDISADM	Eating Disorder Admission		

#### You will see your selections.

				Staff Preferences (TRAIN)
File Staff	Preferences			
	+ 🗙 S			
Save Save and Close	Add Remove Refresh	Delete Selection	Close Panel	
Save	Grid Actions		Close	
Preferences		Currently	Viewing I	nformation for Commonly Performe
Auto Restore		Common	y Perform	ned Assessments
New Assessme	nts	[*ID]		Description
Commonly P	BHAA		BHA Adult	
New Progress Notes		DCSUM		Discharge Summary
- New Client Plans		DEM		Demographics Form
Pharmacies     E     Staff Panes     Staff Panes		DIAG		Diagnosis Form



#### Saving Preferences:

File	Staff Preferer	rces		
	e and Add	Remove Refresh	Delete Selection	Close Panel
Save	USE .	Grid Actions	Selection	Close

#### You have 3 options:

#### Save:

• Click the "Save" icon. This will save settings only.

#### Save and Close:

• Click the "Save and Close" icon. This will save your selections and take you back to the Clinician's Homepage.

#### **Close Panel:**

• **WARNING**: If you click the "Close Panel" icon without saving, all of your preferences will need to be reset.

Note: These preferences will not transfer from your TRAIN account to LIVE. They must be setup in LIVE too.



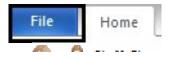
### CLINICIAN'S HOMEPAGE TERMINOLOGY Identifying Terms Used on the Clinician's Homepage

#### Clinician's Homepage:

The Clinician's Homepage is a real-time tool that provides up-to-the-minute client status at a glance.

#### File Tab:

It can be used to exit the application, set preferences, access the external view, or see recently opened views.



#### Tabs:

The "Tabs" listed below are displayed at the top of the Clinician's Homepage.

• There are four tabs: "File", "Home", "Client", and "View."

File	Home	Client	View
	-		

WNote: The "Client" tab will only be available if a client has been selected.

#### **Buttons:**

• The "Buttons" are individual selections that can be clicked on to perform various functions.





#### Ribbon:

• The "Ribbon" is an object that is comprised of various buttons.

File	Home Vie	ew							
	Staff Clear	5		Lient Clear	Services	▲ System eRx not available			
Staff Search	Search by Staff ID	Refresh Staff Panel	Client Search	Case#, Sort Name or SSN			Pharmacy Directory	Break The Glass	Layout and Filters *
	Staff Entity			Client Entity	Group Notes	ePrescribing Status	Pharmacies	Break Glass	Panel Options

#### Staff Panel:

The Staff Panel automatically launches when the Clinician's Homepage is opened.

File	Home V	lew		CUNICIAN'S	HOMEPAGE				- (	3 2
e.	Staff Clear	2	~	Lient Cear	Services	🔥 System eRx not available				
staff Search	Search by Staff ID	Refresh Staff Panel	Client Search	Case#, SortName or SSN			Pharmacy Directory	Break The Glasi	Layout and Filters *	
	Staff Entity			Client Entity	Grosp Notes	ePreicribing Status	Pharmacics	Break Gass	Pane Options	

You will see your name as well as your job title listed. If you believe that the job title is incorrect, you must complete a new ARF form and submit it to the MH MIS Unit for correction.

#### Caseload:

The Staff Panel defaults to show your caseload. These are the clients who have been assigned to you. You can always return to your caseload by selecting the Caseload pane at the bottom of the screen:

Type	Name 🔺
SAI	HEROIC, CLIENT
SAI	TEST, SSN



### **CLIENT SEARCH**

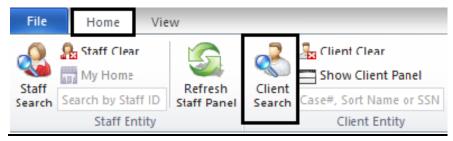
#### Searching for a Client Who Is In Your Caseload:

- On the Clinician's Homepage "Home" tab, under "Caseload", double click on the name of the client.
- This action opens up the "Client Panel" where you can find information about your client.

a CLINI	CAL STAFF
Caseload	
Туре	Name 🔺
SAI	FAKE, TEST
SAI	CLIENT. FAKE
Caseload	DEER. RAIN
SAI	FAIL CEILING
Pre-Intake	kite. Flying

#### Searching a Client Who Is Not In Your Caseload:

• Select the "Client Search" button



• The "Client Lookup" window will open

🚹 Click or	the search but	ton to perform a search for	client records based on	the criteria in the to	op section.	
Client Sear	ch					1
Client Searc	ch Parameters –					
Case #	Q	Sort Name [				Search
Last		First	DOB	11	Thru 77	Default
Alias Last		First	Sex	· •	SSN	Clear
Client Searc	h Results					
Name 🔺	First Last	Case# S Eth DOB	SSN Prim Unit ID Prim U	Jni Prim SubUn P	rim SubU External S	AI ID SAI N
			There are no items to sho	w.		

There are several different ways to search for a client from this window:



 By "Sort Name": Enter the client's sort name in the LAST NAME, FIRST NAME format, then select the "Search" button. (The "Sort Name" is the client's name as formatted when first entered into the CCBH system):

lient Sear	ch													
lient Sear	ch Para	meters -												
Case #		Q		Sor	t Name [									Search
Last					First [			DOB	11		Thru	11		Default
Alias Last [					First [			Sex -		-	SSN	::		Clear
ient Sear	h Resu	ilts —												
Jame 🔺	First	Last	Case#	S Eth	DOB	SSN	Prim Linit ID	Prim Ur	i Prim	SubUn	Prim SubU	External	SAI ID	SAI N.

 If the Sort Name you've entered is in the system, it will be displayed in the "Client Search Results" area, as in this screen shot which exemplifies a search done for fictional client sort name, "PIE, APPLE":

Click on	the search bu	itton to perfo	rm a search	for clie	nt records	s based	on the crit	eria in the to	p section				
Client Sear	rch												ф.
Client Sean	ch Paramete	rs											
Case #			Sor	t Name	PIE, APP	'LE							Search
Last				First			<u>dob</u>	11		<u>Thru</u>	11		Default
Alias Last				First			Sex		*	SSN	··_		Clear
Client Sear	ch Results —	]									· ···· ··· ··· ···		
Name 🔺	First Last	Case#	S Eth	DOB	SSN	Prim Uni	t ID Prim U	ni Prim Su	bUn Pri	m SubU	External	SAI ID	SAI N
PIE, APPLE	APPLE PIE	_											
		K	۲. ۳.	ote: nam	Doul e will	ble C I lau	lickin nch th	g on th e Clier	ne clie nt Par	ent's nel.			

 If the Sort Name you entered is not in the system, you will receive the following stop message:



 This does not mean that the client is not in CCBH. Rather, you may not have entered the sort name exactly as it was formatted when the client's information was first entered into the CCBH system. For this reason, you should search by other criteria such as:



*Note:* Before beginning another type of search, select the "Clear" button to reset the search criteria.

- In client search, enter LAST NAME, FIRST NAME, date of birth (check spelling and in ALL CAPS).
  - o If client is found with that name, double check SSN.
- Search by SSN.
- Search by Alias.
  - If match found, open the Demographic form on client and double check DOB, address, SSN.
  - Check 3rd Party information to see if client has the same Medi-Cal (BIC, CIN) number.
- If it is unclear which is the first name or the last name, enter the other position of names in Alias – e.g., Bubble Gum entered into CCI as GUM, BUBBLE may be entered into Alias as BUBBLE, GUM.

Note: When searching use all capital letters, these fields are case sensitive.

• You can now search by one or more of the other criteria fields (Last, First, DOB, Alias Last, First, Sex, Case Number). Select the "Search" button.

on to perform a search for client rec	ords based on the criteria in th	ne top section.	
			ą.
Sort Name			Search
First	DOB //	Thru 77	Default
First	Sex - 🔻	SSN	Clear
	Sort Name	Sort Name DOB / /	First         DOB         / /         Thru         / /

0-

Note: If you search by data that is common in the system (such as conducting a search only by a common first name) you will receive the following warning screen. This allows you the option to either continue with or cancel the search.

Warning	X
?	The scanning of a large number of Client records has been detected and could lock up the system for a substantial amount of time. Would you like to continue?
	Yes No



#### Additional Client Search Feature

 The "Thru" field, in conjunction with the "DOB" field allows you to search for clients within a particular date range. For example, if the DOB is approximately 3/10/1964 and you enter 3/08/1964 in the "DOB" field and 3/12/1964 in the "Thru" field, all clients in the system who have that dates of birth in that date range will be displayed in the "Client Search Results" window.

Note: If the exact DOB is known ~ enter it in the 'DOB' and 'Thru' fields to find clients born only on that date.

Client Search				
lient Search Parameters				
Case # 0	Sort Name			Search
Last	First	DOB //	Thru 77	Default
Alias Last	First	Sex · 🗸	SSN	Clear

### **NOTES**



## **RESTORE SYSTEM DEFAULTS**

If the layout becomes distorted, or the panes have *disappeared,* select "Restore Panel Layout" (under the Layout and Filters button on the Home tab). This will restore the layout to what it was when you first logged in.

Select "Restore Panel Filters" (under the Layout and Filters button on the Home tab) to bring all the Filters back to their default settings, if desired.

Ch, File	Home Vie	•W	-		CLI	NICIAN'S HOMEPAGE			-	
	Staff Clear	5	3	♣ Client Clear ➡ Show Client Panel	Services	∧ System eRx not available				
Staff Search	Search by Staff ID	Refresh Staff Panel	Client Search	Case#, Sort Name or SSN			Pharmacy Directory	Break The Glass	Layout and Filters T	
	Staff Entity			Client Entity	Group Notes	ePrescribing Status	Pharmacies	Break Glass	-5	
0.	TAFF CLINICA								Rest	ore Panel Layout
Casel									Rest	ore Panel Filters

**NOTES** 



### **ADDING NEW ASSESSMENTS**

- Access the desired client.
- A "Client" tab will open with additional buttons listed within the ribbon.
- The Client Panel will launch on the bottom portion of your screen. The name of the client will display in the client name box.

W Note: A client name must be displayed in the "Client Panel" to have the "Client" tab accessible.

File	Home	Client	View		CLINICIAN'S HOMEP	AGE (TEST3) 3.0	0.0			
Client Information		New Progress Note *	New Assessment -	New Client Plan * Clinical	🕼 Prospective Ranning Tiers	New Pre-elisting Medication		<b>Conditions Review</b>	Refresh Client Panel	Cose Client Panel Options
Caseload		ICAL								
-	Scheduled Se	1	/a							

#### New Assessment Button:

• The New Assessment button will be displayed in the "Client" tab ribbon.

File	Home	Client	View	1	_				
Client Information	Broadca • Alert		Progress ote *	New Assessment ~	New Client Plan -	🗿 Prospective Planning Tiers	New Pre-existing Medication	New Medical Conditions Review	Close Client Panel

Note: The new assessment button is segmented in two parts. The upper portion of the button is a list of all assessments available for entry. The lower portion consists of assessments that have been established as "New Assessments" in your "Preferences".

#### To see a complete list of assessments:

- Click on the top portion of the "New Assessments" button.
- The "New Assessment Lookup" window displays.

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l		

	Assessment Types Lookup
File	Lookup Panel
Select CI	- 🕰 05e
	inel
Actions CI	ose
Assessment	t List (Filters Applied)
Assessment	t List (Filters Applied)
Assessment	List (Filters Applied)
ID	[Туре]
ID	
ID BHAC	[Туре]
ID BHAC DI IACSU BHADEC	[Type] BHA Children
ID BHAC DI IACSU BHADEC	[ Type ] BHA Children DHA Crisis Stabilization Unit
ID BHAC DI IACSU BHADE C BHAESU	[ Type ] BHA Children DHA Crisis Stabilization Unit BHA Dev E val Clinic
ID BHAC DI IACSU BHADE C BHAESU BHAESS	[Type] BHA Children DHA Crisis Stabilization Unit BHA Dev Eval Clinic BHA ESU
ID BHAC DI IACSU	[Type] BHA Children DHA Crisis Stabilization Unit BHA Dev Eval Clinic BHA ESU BHA TBS
ID BHAC DI IACSU BHADE C BHAESU BHATBS CANS CONFI CFARS	[Type] BHA Children DHA Crisis Stabilization Unit BHA Dev Eval Clinic BHA ESU BHA TBS CANS Sharing Confirmation
ID BHAC DI IACSU BHADE C BHAESU BHAESU BHATBS CANS CONFI	[Type] BHA Children DHA Crisis Stabilization Unit BHA Dev Eval Clinic BHA ESU BHA TBS CANS Sharing Confirmation CFARS

- Search for the desired assessment by using the scroll bar on the right side of the list.
- Highlight the assessment you wish to launch.
- Click "Select".
- The system will open the external view and the selected assessment to begin data entry.

Note: Double clicking on the assessment will also launch the desired assessment.

#### Dating the Assessment:

- Place the desired date in the date field.
- Refer to the "GUIDELINES FOR DATES IN CCBH".
- Press the "Save" button. This will launch the assessment for data entry.

		Addin	g Assessmei	nt for TEST	FAKE		x	
File	Asses	sment		-				
S. Refresh	E Save	Request Assessment	Prospective Planning Tiers	Progress Indicators	Close Pane			
Refresh	Actions		Clinical		Close			
🚹 Cick	Save to c	onfirm selection	ons and add a r	new Assessn	nent			
	Assessment Type EHA Adult BHAA							



Note: Correct entry of the date is essential. Once the date is entered in the above field, it cannot be altered.

-	

### **GUIDELINES FOR DATES IN CCBH**

#### Assessment Date:

When adding an assessment, the system will require the entry of a date when opening the form for data entry. This is called the assessment date.

	NA SI	Addin	g Assessment for T	EST FAKE		×
File	Asses	sment				
G	H		6 2			
Refresh	Save	Request	Prospective Progre Planning Tiers Indicat	ess Close		
Refresh	Actions		Clinical	Close		
		onfirm selection	ons and add a new Ass	essment	BHAA	]
		Date 10/17	2014			

The assessment date determines the date the assessment is sorted in the look up window. The assessment date must match the service date that is claimed in the system. Progress note documentation will need to support the service claimed. When an assessment service takes more than one session to complete, multiple service dates claimed must be indicated in each progress note for each service date. However, the assessment date entered in the MIS will remain the initial assessment service date.

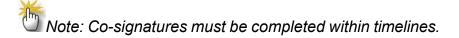




#### Signature Date:

Signature dates may be different than the assessment date, which is necessary at times (i.e. when a co-signature is necessary but the staff is out of the office).

File Ass essment	Final Approved 6H	A. Adult fo	or:			dated 03/15/20	15			3
Refirsh Validation Check Save and Save Final Approve		X Void	Sign	Adid sabure -	Pri Plan	Date of Service or effective date. The system will sort the assessments in the lookup by this date.		documen staff c.or	nd time of tation for the npleting the	
BHA Adult	Activity		, <b>4</b>	Signal	tures	Constant Contract	-	asse	ssment.	1.0
BHA Adult			ą			T Signature Line Heading	Name	Date	Time	
Cinty of San Diego Mental Health Services BENVIORAL HEALTH ASSESSMENT - ADULT			-		Staff Staff	date for the a	TRAINEE CLINICAL OREDENTIALED STA nature was obtain ssessment. For r date the assess	ed and cor	mpletion his is	1



#### Final Approve Date:

The final approval date may be different than the assessment date and/or signature dates. The final approval date is the date that the assessment is considered active and complete. This date will also drive the timelines for documentation reviews.

Name: FAKE, TEST	Case#:	Page: 1 of 3
Type: Demographics Form Printed on 10/17/2014 at 03:23 PM		Date: 10/01/2014 (Final Approved on 10/17/2014 at 03:22 PM)

#### COUNTY OF SAN DIEGO MENTAL HEALTH SERVICES DEMOGRAPHIC FORM

Admission Status O Pre-registered O Registered O Admit

CLIENT IDENTIFYING INFORMATION



## **ELECTRONIC SIGNATURE GUIDELINES**

- Certain assessments in CCBH can be final approved by any clinical staff who have required system access, such as the Safety Alert or the Demographic Form. Anyone can complete the assessment and final approve as themselves, without a co-signature.
- To final approve the Safety Alerts and Demographic Form
  - 1) Make sure all software required fields have been addressed.

Validati	ons	
Severity	Validation 🔺	Description
Critical	Empty Required Fields	All required fields must be completed to be Final Approved.

(a) To check, click the "Perform Validation Check" button at the top of the window. A screen will appear at

-		Н			
Perform	Save and	Save	Final		
Validation Check	Close		Approve		
Validation	Actions				

the center of your screen with a list of fields to be addressed, if any. If all required fields have been addressed, you will not see a screen appear. When ready, proceed with the final approval step for the assessment.

- 2) Click the "Final Approve" button located at the top of the window.
- Enter your CCBH password when prompted.

			Pe	ending	Diagn	osis For	m for			
File	Assessment				_					
Refresh	Perform Validation Check		H Save	Final Approve	Print	Delete	Add Signature +	Prospective Planning Tiers	Progress Indicators *	Close Panel
Refresh	Validation		Actio	ns		Delete	Signatures	Clinical		Close
	🔁 Pass	word - S	STAF	FAD	MIN					_
										×



• Some assessments contain credential restricted signatures. For instance, there are three credential restricted signature lines located in the "Validations" pane of the Diagnosis Form, and two signature lines on the BHAs.

Valida	ations	▼ ₽
Se	Validation 🔺	Description
Crit	Pending Staff Sig	Must be electronically signed by at least one Staff Member to be Final Approved.
Crit	Staff Signature R	Sequence 1: Staff Requiring Co-Signature
Crit	Staff Signature R	Sequence 2: Staff Comp/Accept Assess
Crit	Staff Signature R	Sequence 3: Staff Entering Information
Signa	tures Validations	

Your license type or credential will
 determine how you address each signature line.

#### Staff Who Require a Co-Signature:

1. Sequence 1 (Staff Requiring Co-Signature) - Left click and select "Electronically Sign."

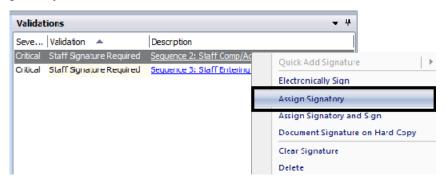
Seve	Validation 🔺	Description	
Critical	Pending Staff Signature	. Must be electronically signed by at Member to be Final Approved.	least one Staff
Critical	Staff Signature Required	Sequence 1: Staff Requiring Co-S	Quick Add Signature
Critical	Staff Signature Required	Sequence 2: Staff Comp/Accept	
Critical	Staff Signature Required	Sequence 3: Staff Entering Info	Electronically Sign
			Assign Signatory Assign Signatory and Sign Document Signature on Hard Copy Clear Signature
			Delete

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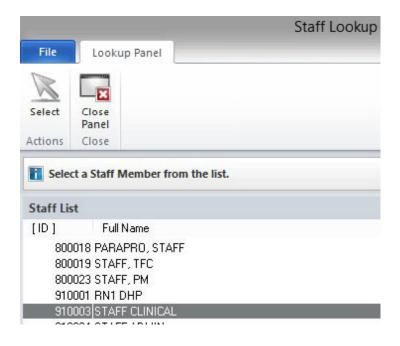
2. Enter your CCBH password when prompted.



3. Sequence 2 (Staff Comp/Accept Assessment) – Left click and select "Assign Signatory."



4. Find your supervisor by name or staff ID. Highlight their name and choose "Select" at the top.







5. Sequence 3 (Staff Entering Information), if applicable – Left click and select "Delete."

6. Click "Save and Close" located at the top of the window. After you click "Save and Close," you return to the Clinician's Homepage. The name of the client will display on the Notifications list on your Clinician's Homepage and on the Homepage of the approved signer until the assessment is co-signed and final approved.

				Pending	Diagn	osis For	m for			
File	Assessment									
5	-	×	H		m	×	2	6	2	×
Refresh	Perform Validation Check	Save and Close	Save	Final Approve	Print	Delete	Add Signature •	Prospective Pr Planning Tiers Ind	ogress icators *	Close Panel
Refresh	Validation		Ad	ions		Delete	Signatures	Clinical		Close

#### Staff Who Final Approve (or Co-Sign) Assessments For Others:

- 1. Find the client on your Notifications list on the Clinician's Homepage.
- Access the assessment and review. The person for whom you are co-signing should have already completed Sequence 1 signature line and deleted Sequence 3.
- Sequence 2 (Staff Comp/Accept Assessment) Left click and select "Electronically Sign."

Validations		<b>→ ₽</b>	
Seve Validation 🔺	Description		
Critical Staff Signature Required	Sequence 2: Staff Comp/Accept Asses	Quick Add Signature	•
		Electronically Sign	



4. Enter your CCBH password when prompted.



5. Click "Final Approve" located at the top of the window.

e como			1	Pending	Diagn	osis For	m for		
File	Assessment								
5			H		-	X	2	<b>S</b>	×
Refresh	Perform Validation Check	Save and Close	Save	Final Approve	Print	Delete	Add Signature •	Prospective Progress Planning Tiers Indicators *	Close Panel
Refresh	Validation		Act	ions		Delete	Signatures	Clinical	Close

REMINDER: Co-signatures and final approval of assessments should be done as soon as possible.

#### PLEASE REMEMBER:

Im

Passwords may NEVER be shared as this constitutes a breach of security and HIPAA violation.

### **NOTES**



### VIEWING ASSESSMENTS

#### Saved forms:

- Are "saved" but not final approved.
- Can be edited or deleted by anyone who has access to that client's forms.
- Will hold up the work flow as they prevent adding another form in which any fields are shared.

#### Lock it down by Final Approving to protect your work!!

#### How to open a saved assessment:

- Select a client and open the "Client Panel". Next, click the "Assessments" pane.
- A list of assessments will display. The assessment that is not final approved will not have a check under the Final Approved status (F/A).
- Double click the assessment. The selected assessment will open for data entry and completion.

FAKE TEST										• ₽ □ ×
Assessments									-	<b>•</b> 7
Date 🔺	Description	1							F/A	LK V
07/01/2015	Demograp	nics Form								
07/01/2015	Diagnosis F	Form								*
									$\mathbf{\nabla}$	
Face Sheet Pre-Intake Assessment	s Primary Assig	Primary Di	Primary Subs	Current Clien	Progress Notes	Authorizations	Primary Insur	Services	Medical Cond	Medications

### VIEWING FINAL APPROVED ASSESSMENTS

- Select a client and open the "Client Panel".
- Next, click the "Assessments" pane.
- A list of assessments will display. The assessments that are final approved will have a check under the Final approved status (F/A).
- Double click the assessment. The selected assessment will open for review.

	F/A	
07/01/2015         Demographics Form           07/23/2015         Diagrosis Form           07/23/2015         Diagrosis Form		
07/23/2015 Diagrosis Form 07/23/2015 Diagrosis Form		-
07/23/2015 Diagrosis Form		
08/21/2015 Diagrosis Form		1
		-
	- V	



### **PRINT TO SCREEN**

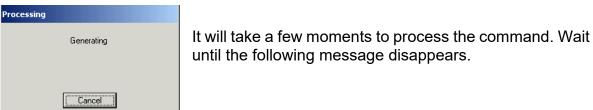
Note: Before printing a hard copy, always print to screen first to verify whether printing is truly necessary.

Click the "Print" button.



Click on the down arrow to the right of the "Printer" field, click "Print Preview", • and click the "Print" button.

		Print Management Panel
File Prir	nt Assessment	
G		
	<b>X</b>	
Refresh Print	Close Panel	
Actions	Close	
(and a second se		
Select optio	ons related to the printin	g of the Client's Assessment
Select optio	ns related to the printin	g of the Client's Assessment
Printer		
Printer Printer Default		



A copy displays on the screen. Pay attention to the total number of pages before deciding to print a physical copy.



A copy displays on the screen. Pay attention to the total number of pages before deciding to print a physical copy.

Name: LAST, FIRST MIDDLE Type: Printed on P901/2010/2010/2010/2010/2010/2010/2010/2	Case#:	Page: 1 of 2 Date:
		0.00

#### <u>lcons</u>

You will find icons across the top of the print screen which will allow navigation through the copy.



Prints a physical copy.

Emails a copy. **DO NOT** use this feature, as it is a breach in confidentiality.

11 Displays the default size of the copy.

Bhrinks the copy down to 25% of the default size.

Zooms in by 50% each time the icon is clicked.

 $\bigcirc$  Zooms out by 25% each time the icon is clicked.

- Navigates directly to the first page.
- A Navigates back one page.
- Navigates forward one page.

Navigates directly to the last page.

- Tisplays keyboard commands for navigating through the copy.
- Isplays the details of the software product.
  - Closes out of "Print to Screen" and returns to the original view.



#### Support Desk Contact Information sdhelpdesk@optum.com 1-800-834-3792

	Monday through Friday (E-mail)
Hours	Services
6:00 am to 6:00 pm	All services except password resets or any service involving PHI
	Monday through Friday (Telephone)
Hours	Services
4:30 am to 6:00 am	Resetting passwords (24 hour programs) and reporting system outages*
6:00 am to 6:00 pm	All services
6:00 pm to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*
	Weekends (Telephone)
Hours	Services
4:30 am to 11:00 pm	Resetting passwords (24 hour programs) and reporting system outages*
11:00 pm to 4:30 am	Reporting system outages*

\* By definition, a system outage affects multiple users. Examples include when: -The system does not respond and appears to be frozen -No data can be entered or viewed

#### Support Desk Suggestions

- Please consult with your program manager and your resource packet prior to contacting the Support Desk.
- When calling for a password reset on weekdays between 4:30-6a or 6-11p, or calling weekends between 4:30a-11p, you must leave a message. Include your name, CCBH staff ID, phone number and the reason for your call.
- You may be given a ticket/tracking number if you call between 6:00a and 6:00p Monday through Friday. Remember to keep this number for future reference.

#### **Additional Contacts**

Questions	Where To Go
Clinical Documentation Questions	Documentation Manual/Your Program Manager
Duplicate Clients and Name/DOB/Gender/SSN Changes	Complete Form BHS-025 and Call Medical Records: 619-692-5700 x 3
Financial Questions (UMDAP/Insurance)	Billing Unit: 619-338-2612 Fax- 858-467-9682
Online User Manuals and Forms	www.optumsandiego.com
Service Codes	CCBH (Anasazi) User Manual/QM Unit