

CHILD AND ADOLESCENT MENTAL HEALTH DIVISION
MAX – Provider Portal
Instructions for Contracted Providers



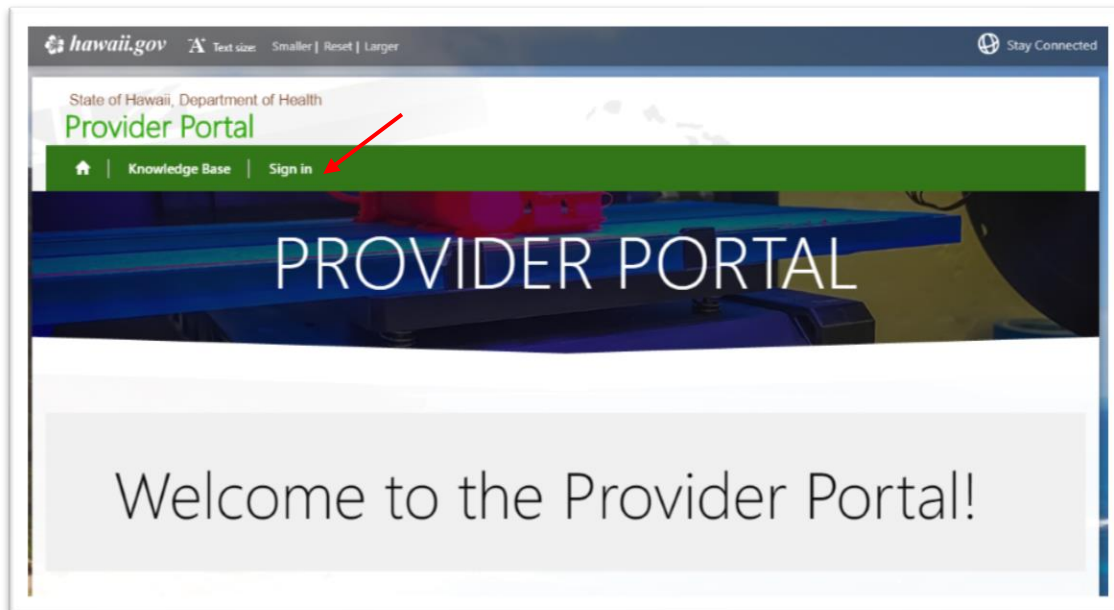
Contents

1	PORTAL BASICS.....	3
	1.1 LOGIN & USER PROFILE.....	3
	1.2 USER ROLES.....	4
	1.3 AGENCY PROFILE	4
2	REFERRALS	5
	2.1 VIEWING REFERRALS	5
	2.2 ACCEPTING REFERRALS	6
3	THE MENTAL HEALTH TREATMENT PLAN (MHTP)	9
	3.1 DEVELOPING THE INITIAL MHTP	9
	3.2 APPROVING THE MHTP	12
	3.3 REVISING THE MHTP.....	13
	3.4 UPDATING THE MHTP.....	13
4	SAFETY PLANS	14
5	PROGRESS NOTES	16
	5.1 PROGRESS NOTES AND THE MHTP	16
	5.2 TREATMENT FOCUS AREAS, TREATMENT TARGETS, & PRACTICE ELEMENTS	18
	5.3 IN-HOME SERVICES (ABI, IIH, IILS, FFT, MST).....	19
	5.4 OUT-OF-HOME SERVICES (CBR, HBR, TFH) – THERAPY & GROUP SESSIONS	24
	5.5 OUT-OF-HOME SERVICES (CBR, HBR) – OVERNIGHT SHIFT NOTE.....	28
	5.6 OUT-OF-HOME SERVICES (CBR, HBR) – AM / PM SHIFT NOTE	30
	5.7 OUT-OF-HOME SERVICES (TFH, TRH) – DAILY NOTE.....	31
	5.8 SUPERVISOR APPROVAL	32
6	INVOICING	36
	6.1 CREATE INVOICE	36
	6.2 EDIT UNIT COST/FEE FOR SERVICE CONTRACT INVOICE.....	37
	6.3 VIEW PROGRESS NOTE & ASSOCIATED INVOICE STATUS	38
7	EXTRAS.....	40
	7.1 VIEWING CUSTOMERS	40
	7.2 WILDCARD SEARCH	41

1 Portal Basics

1.1 LOGIN & USER PROFILE

- Go to <https://bhaproduct.dynamics365portals.us/> to access the Provider Portal login page
 - You can access the training portal here: <https://bhatrainportal.dynamics365portals.us/>
 - The training portal is the best environment for new staff to learn the system
 - Contact the CAMHD HelpDesk for assistance by phone (808-733-9309) or email (DOH.CAMHD.Provider@doh.hawaii.gov)
- Click **Sign In** located in the top navigation bar



- Sign in using your username and password
 - Username:
 - Password:
- This brings you to your user Profile where you can update your profile information

A screenshot of the user Profile page. The page is titled 'Profile' and shows a user profile for 'Roger Cena'. On the left, there are links for 'Profile', 'Security', 'Change Password', 'Change Email', and 'Manage External Authentication'. The main content area is titled 'Your Information' and contains a form with fields for 'First Name *' (Roger), 'Last Name *' (Cena), 'E-mail', 'Business Phone', 'Organization Name', 'Title', 'Nickname', and 'Web Site'. A note at the top of the form states: 'Please provide some information about yourself. The First Name and Last Name you provide will be displayed alongside any comments, forum posts, or ideas you make on the site. The Email Address and Phone number are required but will not be displayed on the site. Your Organization is required, and a Title is optional. They will be displayed with your comments and forum posts.'

1.2 USER ROLES

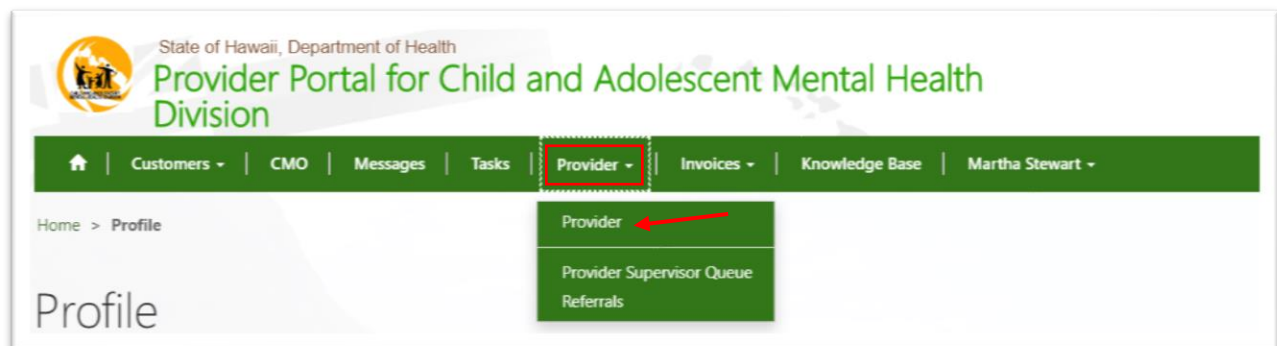
There are three user roles within the provider portal with different viewing and editing capabilities.

- **Provider Administrator:** This designated person(s) within your organization can edit agency profile information, respond to provider referrals, and create and submit progress notes and invoices
- **Rendering Provider Supervisor (must be QMHP):** This designated person(s) within your organization has permission to view and complete tasks, view customers, cases, and service authorizations, respond to provider referrals, edit and submit provider plans, and create and submit progress notes
- **Rendering Provider:** This designated person(s) within your organization has permission to view and complete tasks, view customers, cases, and service authorizations, edit provider plans, and create progress notes

1.3 AGENCY PROFILE

All authenticated users for the agency can view the profile, but only individuals with a **Provider Administrator role can edit** the information within the Provider Profile.

- Navigate to the Provider Profile by clicking **Provider** in the green navigation bar at the top of the page and selecting **Provider**

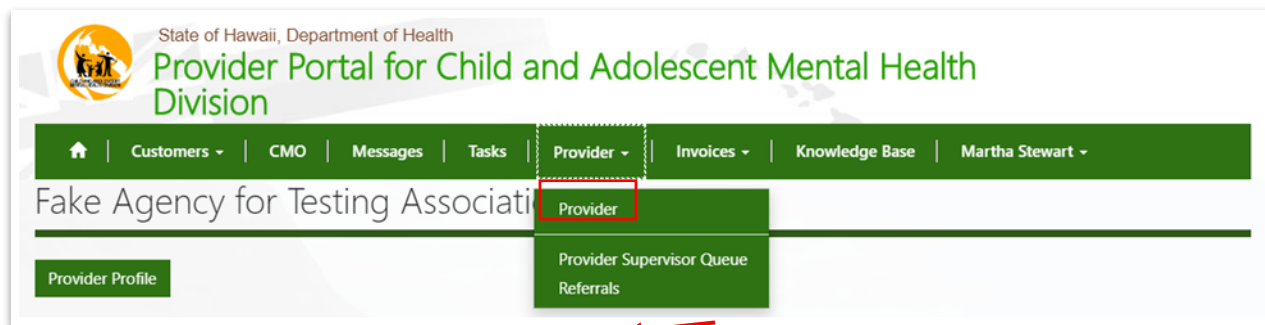


- From the **Provider Profile** page, the user can:
 - Update Provider Attributes
 - Update Contact Details (General)
 - Update Provider Address
 - View Rendering Providers and Credentials
 - View Provider Contracts
- Enter data in the fields you would like to update then click **Update Information** at the top right of the profile page

2 Referrals

2.1 VIEWING REFERRALS

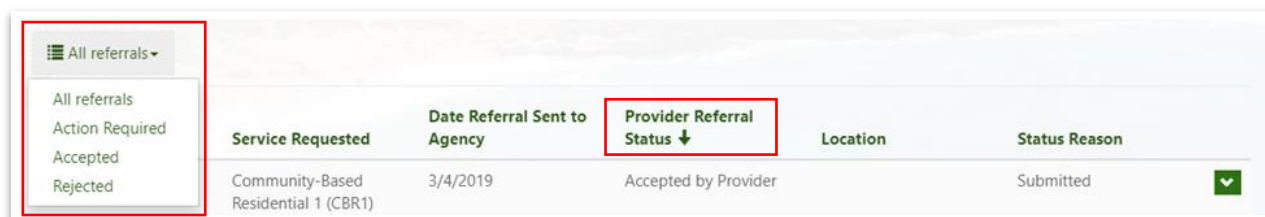
Only those with the **Provider Administrator** and/or **Rendering Provider Supervisor** roll can respond to referrals.



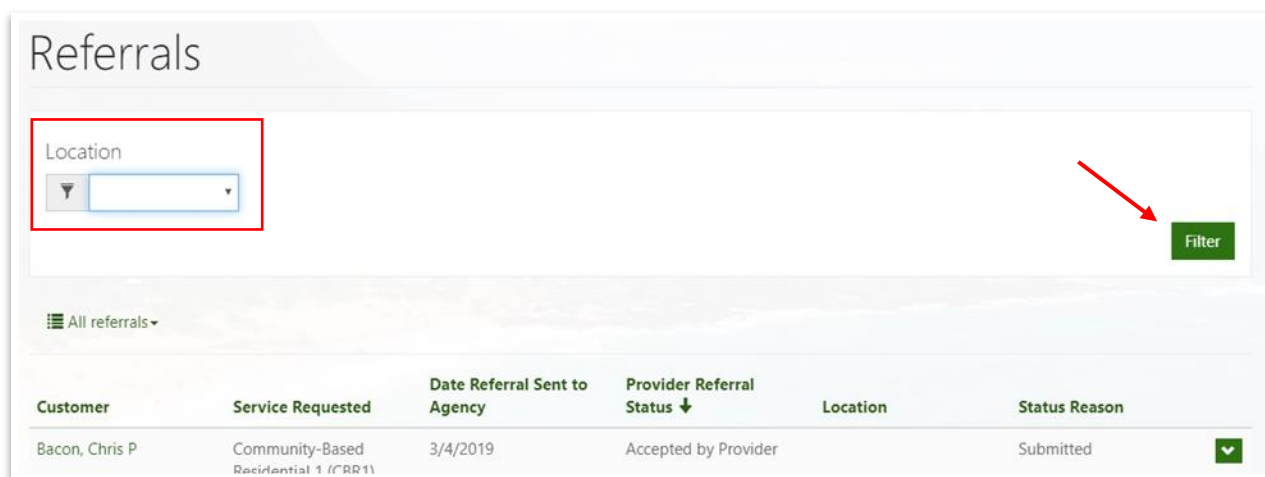
- Navigate to **Provider** in the green navigation bar at the top of the page, then select **Referrals**

Note: By default, the **Referrals** page will display a list of all referrals that have been *Submitted* to your agency. If another agency is selected by CAMHD to provide the service (Status Reason = Alternate Provider Selected), the referral will no longer appear on your referral list.

- You can change the list view by selecting an option from the menu or clicking on a column heading to sort ascending / descending



- You can also filter by Location, choose a Location from the list and click **Filter**



- To view referrals, click on the **Customer** name or the action dropdown (downward arrow on the far right of the screen) and select **View Details**

Customer ↑	Service Requested	Date Referral Sent to Agency	Provider Referral Status	Status Reason	
Adams, Amanda	Individual Therapy - 60 minutes	10/23/2018	Submitted		▼
Barnes, Kelly	Functional Family Therapy (FFT)	10/21/2018	Submitted		▼

View Details

- From the **Referral Details** page, review the Customer, Contacts, Case, and Service Plan information

2.2 ACCEPTING REFERRALS

- Open a referral and click **Accept the Referral**

Home | Customers ▾ | CMO | Tasks | Provider ▾ | Invoices ▾ | Knowledge Base | Juan Lewis ▾

Home > Provider Profile > Referrals > Referrals Details

Referrals Details

- Should your agency decide to reject this referral for any reason, please indicate such by completing the following required steps within two (2) working days of receipt of the referral packet from the FGC:
 1. Indicate by checking the box below if your agency is rejecting the referral.
 2. Have agency Clinical Lead input his/her name below.
 3. Have agency Clinical Lead input signature below.
 4. Provide a written justification of the rejection by Clinical Lead.
 5. Submit this form within two (2) working days of receipt of the referral.
- PLEASE NOTE: The above five (5) steps must be completed if the agency rejects a referral. Please contact the FGC MHCC assigned to the referral to discuss any delays in returning this form within two (2) working days as required.

Accept the Referral
Reject the Referral

- On the **Referral Acceptance Form (RAF)**, complete the following fields:
 - *Provider Referral Status* (select option: Accepted by Provider; Accepted but No Start Date; or Accepted as Waitlist). Choose:
 - **Accepted by Provider** if you anticipate starting services within 2 weeks
 - **Accepted as Waitlist** if you anticipate starting services after 2 weeks
 - *Anticipated Admit / Start Date* (if Status = Accepted by Provider or Accepted as Waitlist)
 - *Date Waitlisted & Waitlist Number* (if Status = Accepted as Waitlist)

Accept the Referral

Accept the Referral

Acceptance Form

Customer *
banana, joe

Date Referral Sent to Agency
12/27/2018

Provider *
CW Behavioral Health Services

Provider Agency Person
Ralph Dibny

Status Reason
Submitted

Provider Referral Status *
Accepted by Provider

Date Referral Accepted
1/2/2019

Anticipated Admit or Service Date

Date Waitlisted

Provider Waitlist Number

- *Rendering Provider 1* (assign therapist)
- *Rendering Provider 1 Credential* (select therapist's credential level)
- *Rendering Provider 2* (assign paraprofessional / additional provider if applicable)
- *Rendering Provider 2 Credential* (select additional provider's credential level)
- *Provider Agency Contact Signature* (enter name of person completing the RAF)

Additional Properties

Rendering Provider 1 *

Rendering Provider 1 Credential *

Provider Agency Contact Signature *

Rendering Provider 2

Rendering Provider 2 Credential

- Click **Accept the Referral** at the top of the form to submit the RAF
- On the **Referrals** page, notice that *Provider Referral Status* has been updated

Home Customers CMO Tasks Provider Invoices Knowledge Base Ralph Dibny				
Home > Provider Profile > Referrals				
<h1>Referrals</h1> <div> Accepted </div>				
Customer	Service Requested	Date Referral Sent to Agency	Provider Referral Status	Status Reason
Aloha, Okalani	Intensive In-Home Therapy (II-H)	12/11/2018	Accepted by Provider	Selected for Service
banana, joe	Intensive In-Home Therapy (II-H)	12/27/2018	Accepted by Provider	Submitted

- The Care Coordinator will review the RAF and select an Agency to provide the requested service, this is reflected in the Status Reason column of the **Referrals** page
- You can modify **Accepted** referrals as long as the *Status Reason* equals **Submitted** – this includes changing the *Rendering Provider* and/or *Provider Referral Status* and/or *Waitlist Number*
- If the Care Coordinator selects another Provider, the referral will disappear from your **Referrals** page.

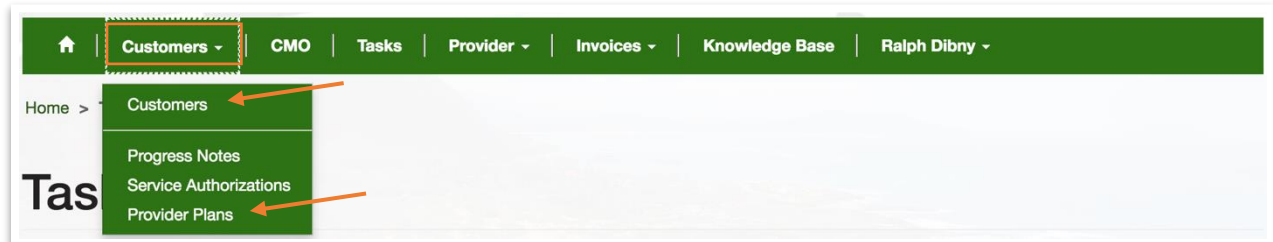
Rejections are reserved for situations where the Provider feels the youth is not appropriate for the requested level of care / service and require a specific protocol as outlined in the Teal Book.

3 The Mental Health Treatment Plan (MHTP)

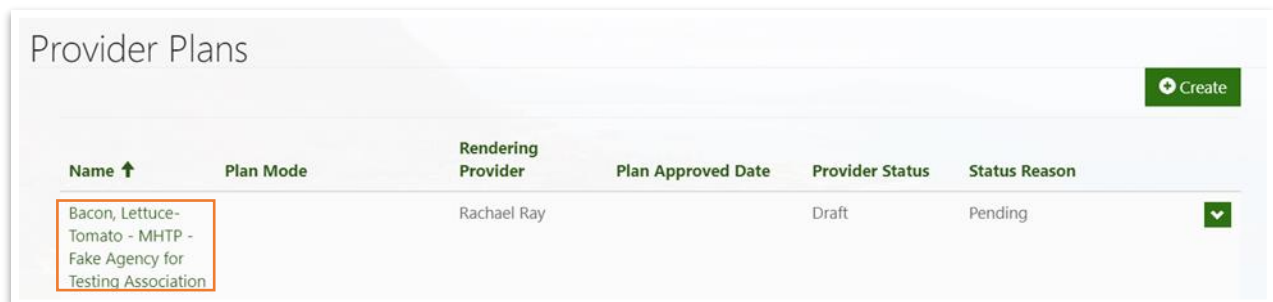
3.1 DEVELOPING THE INITIAL MHTP

Once the Care Coordinator selects you as the service provider, the youth will appear in your Customer List.

- Navigate to **Customers** from the green navigation bar at the top of the page, select **Customers** (or **Provider Plans**) and select the customer you will be working on



- On the customer's profile page, scroll down to **Provider Plans** and click on the plan name



You no longer need to create a second plan – you should only have one (1) plan for each youth, unless you provide more than one service to that youth, in which case you will have one (1) plan per service.

- Complete the following fields:
 - *Plan Mode* (select **Initial Plan**)
 - *Service Start Date*
 - *Rendering Provider* (select assigned **Therapist**)
 - *Date of Plan*
 - *Version Number* (enter **1**)
 - *List of Attendees of MHTP Meeting* (participants who helped develop the plan)
 - *To Approved By* (select **Supervisor** - must be a QMHP)
 - *Youth Information* (Description, Strengths, Barriers)
- Click **Update**

MHTP Date Fields Defined

Service Start Date = date the service started / date of intake / date of first contact with youth/family (this field will not change throughout the course of services)

Date of Plan = date the plan is created and/or updated (this field will change throughout the course of services – minimally every 3 months)

Service End Date = date the service ended / date of final session / date of discharge (this field will remain empty throughout the course of services)

- Return to the treatment plan, review the **Treatment Recommendations** section which reflects the *Treatment Focus Areas* and *Treatment Targets* from the CMP
- Proceed down to the **Provider Treatment Targets** section, click **+ Create** and complete the following fields:
 - *Treatment Focus* (select one of the options from the CMP)
 - *Behavior [Treatment Target¹]* (select one – preferably one that matches the CMP)
 - *Start Date*
 - *Projected End Date*
 - *Measurable Goal/Outcome*

Treatment Target Date Fields Defined

Start Date = date the Treatment Target is created (this field will not change throughout the course of services)

Projected End Date = estimated end date for the Treatment Target / best guess of how long target will be active

End Date = date the Treatment Target is completed / discontinued / closed (this field will remain empty until the target is no longer needed)

- Click **Submit**
- The treatment target should populate in the **Provider Treatment Targets** table
- From the action dropdown, select **Edit** to add Practice Elements for the given treatment target

Behavior ↑	Behavior Category (Behavior)	Provider Tx Target Start Date	Provider Tx Target End Date	Status Reason	
Activity Involvement	Positive Behavior	1/24/2019		New	⌵
Attending to Basic Needs	Other Targets	1/24/2019		New	⌵

+ Create
 View Details
 Edit

- At the bottom of the treatment target form, click **+ Create** to add Practice Elements and complete the following fields:
 - *Practice¹*
 - *Start Date*
 - *Treatment Description*
- Repeat the above steps to create Goals and Practice Elements for each Treatment Focus Area

Practice Element Date Fields Defined

Start Date = date the Practice Element is created (this field will not change throughout the course of services)

End Date = date the Practice Element is completed / discontinued / closed (this field will remain empty until the element is no longer needed)

¹ See attachment / last page for a full listing of Treatment Target and Practice Element options, also checkout the newly updated [Codebook](#) for definitions

- Proceed down to the **Treatment Format** section, click **+ Create** and complete the following fields:
 - *Name* (enter a number or letter – 1 or A)
 - *Intervention Format* (select one of the options)
 - *Sessions Per Week*
 - *Units Per Session*
 - *Additional Comments* (if necessary)
- Click **Submit**
- **Repeat the above steps for all planned Treatment Formats**
- Proceed down to the **Provider Recommended Step Down Treatment** section, click **+ Create** and complete the following fields:
 - *Treatment Options* (select **Preferred Option**)
 - *Probable Time-Frame*
 - *Important Indicators for Discharge*
 - *Anticipated Barriers for Discharge*
 - *Discharge Plan*
 - *Discharge Criteria*
- Click **Submit**
- If you are still working on the MHTP and want to save your progress, click **Update** at the bottom of the page
- If you are ready to submit your MHTP to your Supervisor, click **Submit to Approver Queue**
- The Provider Status of the MHTP should now state “Ready to Submit”

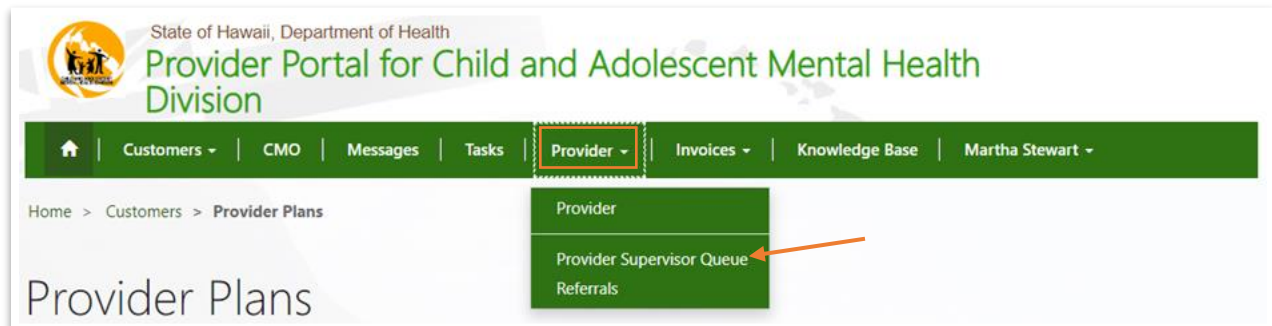
Provider Plans

Customer ↑	Plan Approved Date	Plan Mode	Provider Status	Status Reason	
Bacon, Chris P		Updated Plan	Draft	Needs Revision	▼
Bacon, Chris P		Initial Plan	Ready to Submit	Pending	▼
Bacon, Chris P			Submitted	Approved	▼
Bacon, Lettuce-Tomato	6/4/2019	Updated Plan	Submitted	Approved	▼

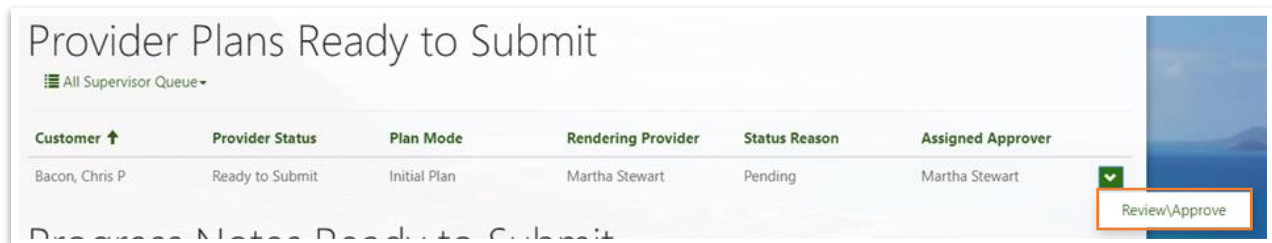
3.2 APPROVING THE MHTP

Only those with the **Rendering Provider Supervisor** roll can submit treatment plans.

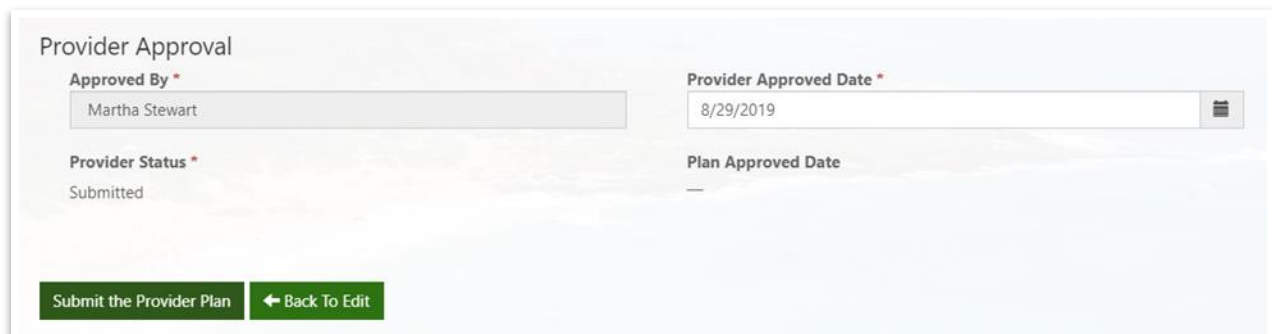
- Navigate to **Provider** from the green navigation bar at the top of the page, select **Provider Supervisor Queue**



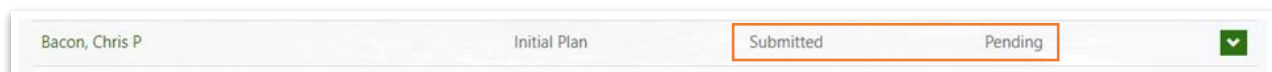
- Click on the action dropdown button of a treatment plan and select **Review\Approve**



- If you have already reviewed the plan with the therapist in supervision, enter a **Provider Approved Date** then click **Submit the Provider Plan** which will send it to the Family Guidance Center for review
- If you still need to review the plan, click **Back to Edit** which will allow you to view the full plan and make any necessary changes



- Once submitted, you should see the Provider Status change to Submitted and the Status Reason (i.e., CAMHD status) change to Pending within the Provider Plans list view



- The Care Coordinator and Clinical Lead will be notified that the MHTP has been submitted; after reviewing it, they will set the status to either **In Progress** or **Needs Revision**

3.3 REVISING THE MHTP

If the FGC team requests revisions to the initial plan, the Status Reason will show **Needs Revision**.

- Open the treatment plan
- Note what needs to be fixed; make necessary corrections and click **Submit to Approver Queue**

The screenshot shows a form for revising an MHTP. The fields are as follows:

- Plan Mode:** Initial Plan
- Date of Plan:** 11/6/2019
- Service Start Date:** 11/4/2019
- Service End Date:** (empty)
- Care Coordinator:** (empty)
- Version Number:** 1
- Business Unit:** (empty)
- Status Reason:** Needs Revision
- List of Attendees of MHTP Meeting:** Youth, Parent, Therapist
- Revisions Requested:** Missing Practice Elements (dla 11/7/19)

3.4 UPDATING THE MHTP

Updates should be made to the existing MHTP (i.e., do not create a new MHTP for every quarterly update). MHTP updates may be requested by FGC staff if more information is needed or if a quarterly update is due.

- Open the existing treatment plan
- If doing a quarterly update, update the following fields:
 - *Plan Mode* (select **Updated Plan**)
 - *Date of Plan*
 - *Version Number*
 - *Youth Information* (if necessary)
- Click **Update** at the bottom of the page
- When updating Treatment Target Goals, do not write over the existing goal unless you have received a PDF version of the initial / previous plan; instead, document updates like this:

Measurable Goal/Outcome

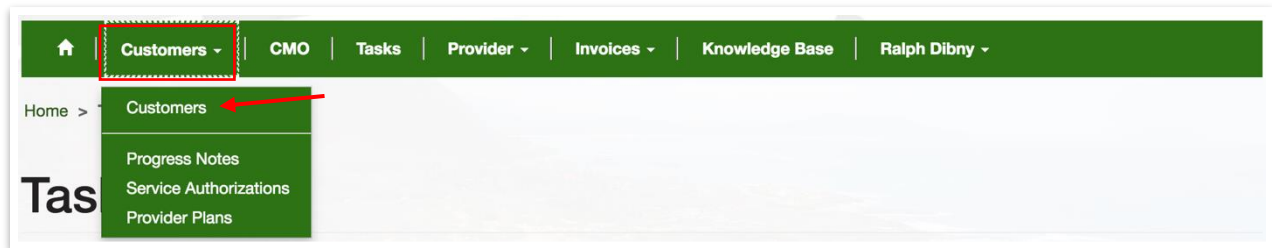
5/7/2019 - increase cracker intake from 2 to 5 per day
3/15/2019 - Eat one cracker a day

Measurable Goal/Outcome

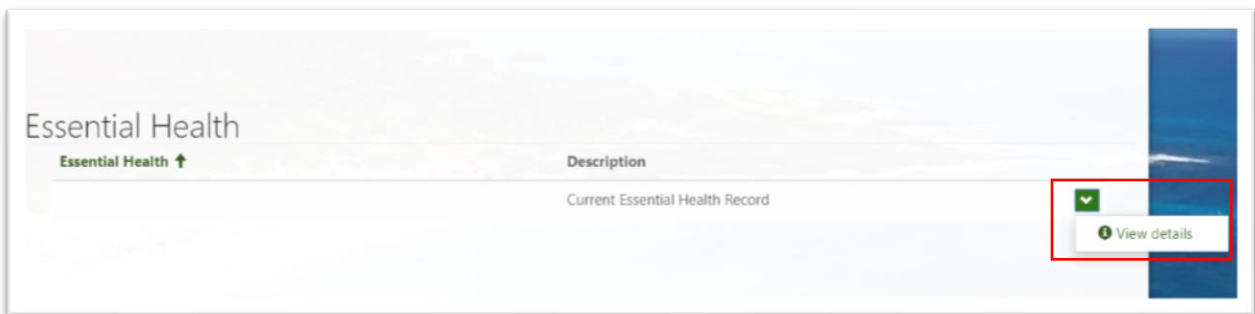
COMPLETE (7/31/19) - doing more stuff w/ Bread; weekly scheduled activities; no longer requires therapist support to initiate.
NEW (6/3/19) - Do more stuff w/ Bread.

4 Safety Plans

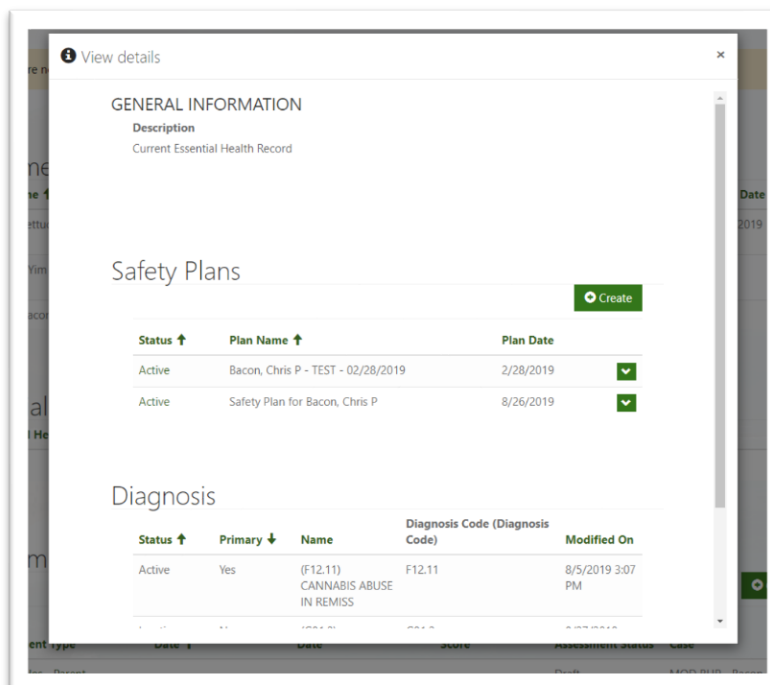
- Navigate to **Customers** from the green navigation bar at the top of the page, then select **Customers** and select the customer you will be working on



- Scroll down to the **Essential Health** section, click on the action dropdown and select **View Details**



- The Essential Health record will appear in a pop up window that displays current Safety Plan(s) and Diagnosis



- To create a new Safety Plan, click **Create**; to edit an existing Safety Plan, click the action dropdown and select **Edit**

- Complete the Safety Plan sections:
 - *Problem Behaviors*
 - *Triggers*
 - *Warning Signs*
 - *Interventions*
 - *Things that Make it Worse*
 - *Crisis Strategies*
 - *Additional Strategies*
- Click the **Submit** button to save
- The Safety Plan can be edited at any time by clicking on the **Edit** button

The screenshot shows a web interface for a 'Safety Plan'. At the top, there are five tabs: 'Safety Plan', 'Customer Details', 'Progress Notes', 'Documents', and 'Center Notes'. The 'Safety Plan' tab is selected. Below the tabs, the word 'General' is displayed. Under 'General', there are two fields: 'Plan Date' with the value '2/28/2019' and 'Completed By' with the value 'CAMHD'. In the top right corner of the form, there is a green button labeled 'Edit', which is highlighted by a red rectangular box.

- The easiest way to print the Safety Plan is to print from the provider portal (i.e., use Ctrl + P while on the Safety Plan)

5 Progress Notes

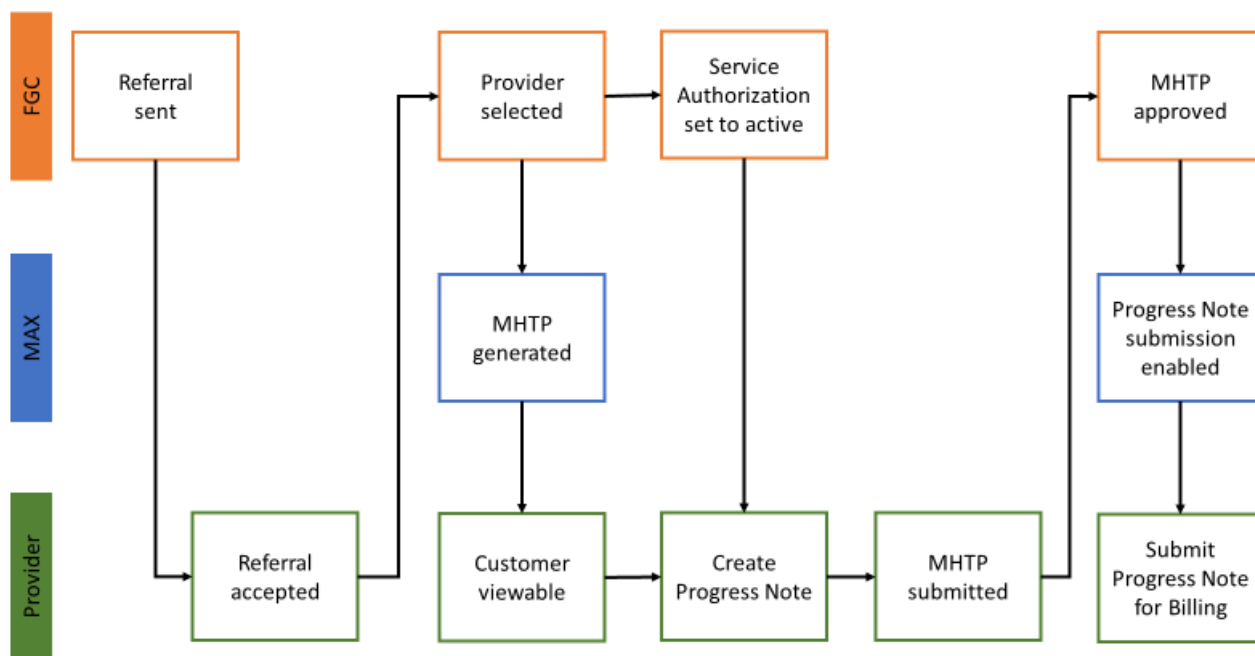
5.1 PROGRESS NOTES AND THE MHTP

The ability to enter Progress Notes is determined by (a) an active Service Authorization and (b) a submitted and approved MHTP (see diagram below). Until the MHTP has been approved by CAMHD, a provider agency and therapist can only create progress notes in draft form (i.e., cannot validate and submit for billing).

The MAX case management system automatically generates MHTP based on a provider being selected from an existing referral. That is, when an FGC care coordinator selects your agency for service within the referral acceptance form, the system generates a shell MHTP that is pushed to the provider portal.

The Customer is then viewable within your agency's portal and you can view existing service plans and assessments for the youth. Once an active service authorization is entered for your agency and that specific youth, your agency can create and save draft progress notes.

Progress notes can be submitted once the MHTP has been submitted by the provider agency and approved by the FGC. The CAMHPS (Teal Book) requires that MHTP be submitted within 10 days from the start of services.



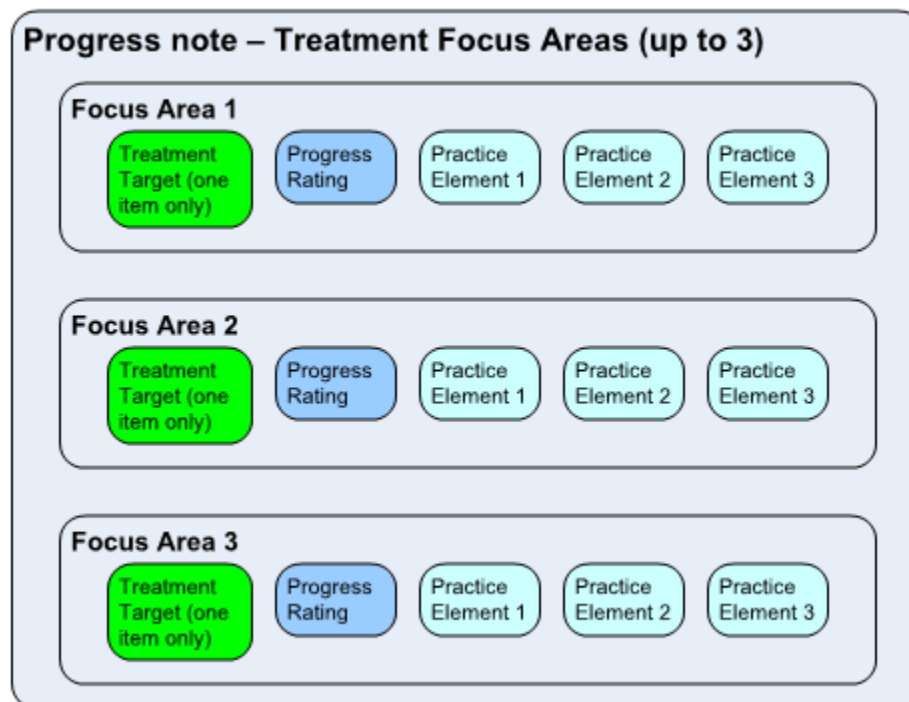
A comprehensive table of MHTP status values are presented below to help troubleshoot any problems with creating and submitting progress notes.

Provider Status	Status Reason	Customer Visible on Portal	Progress Note on Portal
Draft	In Progress	Yes	Create / Update
Draft	Pending	Yes	Create / Update
Draft	On Hold	No	N/A
Draft	Approved	Yes	Create / Update
Draft	Completed	No	N/A
Draft	Needs Revision	Yes	Create / Update
Draft	Action	Yes	Create / Update
Submitted	In Progress	Yes	Create / Update
Submitted	Pending	Yes	Create / Update
Submitted	On Hold	No	N/A
Submitted	Approved	Yes	Create / Update / Submit
Submitted	Completed	No	N/A
Submitted	Needs Revision	Yes	Create / Update
Submitted	Action	Yes	Create / Update

5.2 TREATMENT FOCUS AREAS, TREATMENT TARGETS, & PRACTICE ELEMENTS

A quick note regarding **Treatment Focus Areas**, **Treatment Targets**, and **Practice Elements** as it relates to progress notes (see visual below):

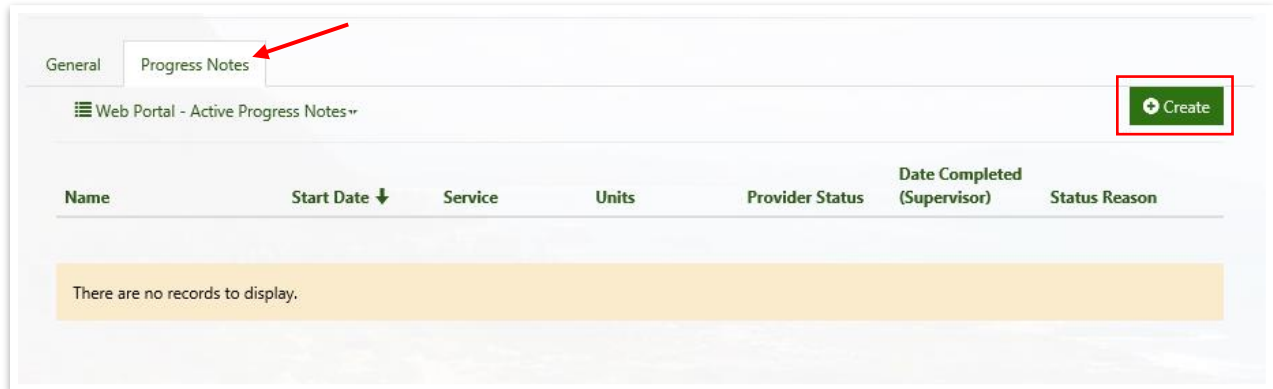
- A **Treatment Focus Area** should be a narrative of a major problem area identified by CAMHD clinical teams (e.g., increase family functioning and communication)
 - Treatment Focus Areas are not needed on the progress note
- A **Treatment Target** is a behavior or specific area of focus in treatment (e.g., oppositional behavior)
 - A provider may identify up to three Treatment Targets in one note (which may correspond to one or more Treatment Focus Areas)
 - One progress rating (see table at the end of this document) should be assigned to the Treatment Target
- A **Practice Element** is an intervention used to address treatment targets in therapy
 - A provider may identify up to three Practice Elements used to address a Treatment Target and associated progress rating for the session





Reproduced with thanks to Hale Kipa and permission by Tom Kagehiro and Steven Hurlbut of Business Solution Technologies

5.3 IN-HOME SERVICES (ABI, IIH, IILS, FFT, MST)

- Navigate to **Customers** in the green navigation bar at the top of the page, then select **Customers**
- Click on your Customer's name to open the Customer record
- Select the **Progress Notes** tab and click **+ Create**



The screenshot shows the 'Progress Notes' tab selected in a customer record. A red arrow points to the 'Progress Notes' tab. In the top right corner, a green '+ Create' button is highlighted with a red box. Below the button is a table header with columns: Name, Start Date (with a dropdown arrow), Service, Units, Provider Status, Date Completed (Supervisor), and Status Reason. Below the table header, a yellow message box states 'There are no records to display.'

- When the **New Progress Note** template opens, complete the following fields:
 - *Name* (rename the note: DAP – service date)
 - *Service Authorization* (if there is more than one active Service Auth, click on the  and select the appropriate one then click **Select**)
 - *Start Date & Time*
 - *End Date & Time*
 - *Diagnosis*
 - *Place of Service* (click on the  and select the appropriate location then click **Select**)
 - *Service Format*
 - *Units*

General Progress Notes New Progress Note Center Notes Documents

Progress Note ID

Customer *
Bacon, Chris P

Note Type *
Provider

Case *
MQD BHP - Bacon, Chris P - Case

Provider Plan *
Bacon, Chris P - MHTP - Fake Agency for Testing Association

Service Plan *
Bacon, Chris P - CMP - 3/1/2019 - 7/17/2020

Start Date *
8/30/2019 10:00 AM

End Date *
8/30/2019 6:00 PM

Units *

Service Authorization *
Service Authorization - Transitional Family Home (TFH)

Service *
Transitional Family Home (TFH)

Diagnosis *

Place of Service *

Service Format

Client Site

- Other Service Setting (if applicable)
- Other Service Format (if applicable)
- If this is a Discharge note, click on the Yes button to reveal additional fields to complete
 - Success/Goals Met?
 - Reason for discharge (select all that apply)

Discharge Note
☐ No ☒ Yes

DISCHARGE REASON

Success/Goals Met? *
☒ No ☐ Yes

Reason for discharge (select all that apply):

☐ Insufficient Progress

☐ Family Relocation

☐ Runaway/Elopement

☐ Declined Services: Caregiver

☐ Declined Services: Youth

☐ Eligibility Change

☐ Alternate CAMHD Service

☐ Outside Service

☐ Youth Aging Out

☐ Released from FCLB

☐ Other

- *Sensitivity* (if Yes, include the content category and indicate in DAP section the areas to redact)

SENSITIVITY

The contents of this note are sensitive

☒ No
 ☐ Yes

Content Category

- *Data*
- *Plan*
- *Assessment*
- *Date Completed*
- Click **Save & Continue**

SIGNATURE

Provider *

CW Behavioral Health Services

✕ 🔍

Rendering Provider *

Ralph Dibny

✕ 🔍

Date Completed (Rendering Provider)

12/18/2018

📅

Provider Status *

Draft

Additional Comments/Recommendations

Status Reason

Save & Continue

← Cancel

- Once the **Progress Note** is saved, you can now add **Treatment Targets** and **Practice Elements**
- Click **+ Create** to add a **Treatment Target**

TREATMENT TARGETS

+

 Create

Behavior ↑

Progress Rating

- Click on the 🔍 select a Behavior (Treatment Target) that matches your MHTP then click **Select**
- Select a Progress Rating, then click **Submit**

Behavior *

Aggression

Progress Rating

4

Practice Elements

Submit **← Return to Progress Note**

- Click **+ Add** to add a **Practice Element**

Practice Elements

+ Add

Practice Name (Practice) Practice Category (Practice)

- Click on the **🔍** and select a Practice Element that matches your MHTP then click **Select**
- Click **Submit**
- Repeat the above steps to add more Practice Elements
- Click **Save & Return**

Practice Elements

+ Add

Practice Name (Practice) Practice Category (Practice)

Attending Behavior Management

Save & Return **← Return to Progress Note**

- Add more Treatment Targets and Practice Elements if necessary
- To submit the Progress Note, click **Update** or **Submit to Approver Queue** (if Rendering Provider)

SIGNATURE

Provider *

Fake Agency for Testing Association

x

Q

Rendering Provider *

Rachael Ray

x

Q

Date Completed (Rendering Provider)

8/29/2019

Provider Status *

Ready to Submit

Supervising Provider

Martha Stewart

x

Q

Rejected Reason

Additional Comments/Recommendations

Status Reason

Draft

NOTE: Only Rendering
Provider Supervisors and
Provider Administrators
can Proceed to Submission.

Submit To Approver Queue

Update

Proceed To Submission

5.4 OUT-OF-HOME SERVICES (CBR, HBR, TFH) – THERAPY & GROUP SESSIONS

- Navigate to **Customers** in the green navigation bar at the top of the page, then select **Customers**
- Click on your Customer's name to open the Customer record
- Select the **Progress Notes** tab and click **+ Create**

General Progress Notes

Web Portal - Active Progress Notes

+ Create

Name	Start Date ↓	Service	Units	Provider Status	Date Completed (Supervisor)	Status Reason
------	--------------	---------	-------	-----------------	-----------------------------	---------------

There are no records to display.

- When the **New Progress Note** template opens, complete the following fields:
 - *Progress Note ID* (description of session)
 - *Service Authorization* (if there is more than one active Service Auth, click on the and select the appropriate one then click **Select**)
 - *Start Date & Time*
 - *End Date & Time*
 - *Place of Service* (click on the and select the appropriate location then click **Select**)
 - *Service Format*
 - *Units* (**DAP Note Units = 0**)

General Progress Notes New Progress Note Center Notes Documents

Progress Note ID

Customer *
Bacon, Chris P

Note Type *
Provider

Case *
MQD BHP - Bacon, Chris P - Case

Service Authorization *
Service Authorization - Transitional Family Home (TFH)

Provider Plan *
Bacon, Chris P - MHTP - Fake Agency for Testing Association

Service *
Transitional Family Home (TFH)

Service Plan *
Bacon, Chris P - CMP - 3/1/2019 - 7/17/2020

Diagnosis *

Start Date *
8/30/2019 10:00 AM

Place of Service *

End Date *
8/30/2019 6:00 PM

Service Format

Units *

Client Site

- *Other Service Setting* (if applicable)

- *Other Service Format* (if applicable)
- If this is a Discharge note, click on the Yes button to reveal additional fields to complete
 - *Success/Goals Met?*
 - *Reason for discharge (select all that apply)*

- *Sensitivity* (if Yes, include the content category and indicate in DAP section the areas to redact)

- *Data*
- *Plan*
- *Assessment*
- *Date Completed*
- Click **Save & Continue**
- Once the **Progress Note** is saved, you can now add **Treatment Targets** and **Practice Elements**
- Click **+ Create** to add a **Treatment Target**

- Click on the **🔍** select a Behavior (Treatment Target) that matches your MHTP then click **Select**
- Select a Progress Rating, then click **Submit**

Behavior *

Aggression

Progress Rating

4

Practice Elements

Submit ← Return to Progress Note

- Click **+ Add** to add a **Practice Element**

Practice Elements

+ Add

Practice Name (Practice) Practice Category (Practice)

- Click on the **🔍** and select a Practice Element that matches your MHTP then click **Select**
- Click **Submit**
- Repeat the above steps to add more Practice Elements
- Click **Save & Return**

Practice Elements

+ Add

Practice Name (Practice) Practice Category (Practice)

Attending Behavior Management

Save & Return ← Return to Progress Note

- Add more Treatment Targets and Practice Elements if necessary
- To submit the Progress Note, click **Update** or **Submit to Approver Queue** (if Rendering Provider)

SIGNATURE

Provider *

Fake Agency for Testing Association

x

Q

Rendering Provider *

Rachael Ray

x

Q

Date Completed (Rendering Provider)

8/29/2019

Provider Status *

Ready to Submit

Supervising Provider

Martha Stewart

x

Q

Rejected Reason

Additional Comments/Recommendations

Status Reason

Draft

NOTE: Only Rendering
Provider Supervisors and
Provider Administrators
can Proceed to Submission.



Submit To Approver Queue

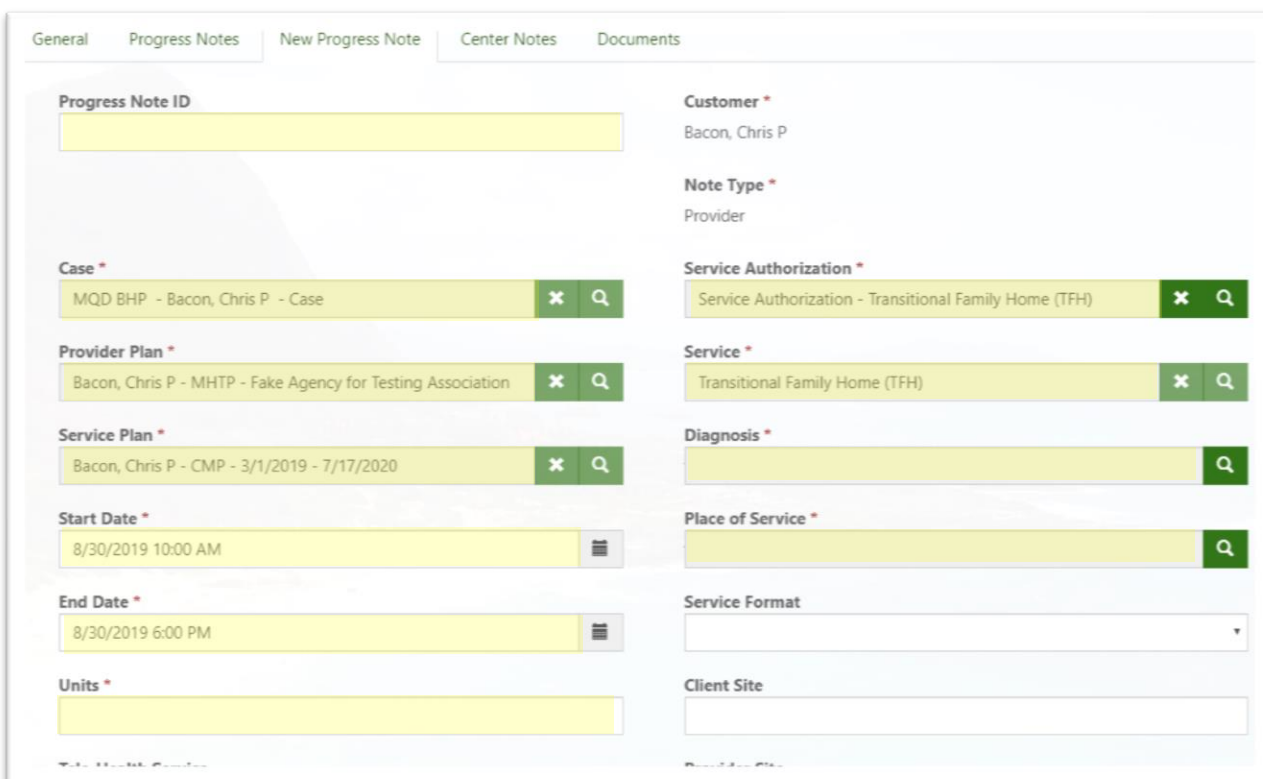
Update

Proceed To Submission

5.5 OUT-OF-HOME SERVICES (CBR, HBR) – OVERNIGHT SHIFT NOTE

Note: The Overnight Shift Note is the billing moment for Residential Services.

- Navigate to **Customers** in the green navigation bar at the top of the page, then select **Customers**
- Click on your Customer's name to open the Customer record
- Select the **Progress Notes** tab and click **+ Create**
- When the **New Progress Note** template opens, complete the following fields:
 - *Progress Note ID* (rename the note: Overnight Shift - service dates)
 - *Service Authorization* (click on the  select the appropriate Service Auth and click **Select**)
 - *Start Date & Time* (Note: these must be on the same day, i.e. 12:00 midnight to 7:00 am)
 - *End Date & Time*
 - *Place of Service* (click on the  and select the appropriate location then click **Select**)
 - *Units* (**Overnight Shift Note Units = 1**) Note: 1 unit per note is the maximum acceptable.



- *Other Service Setting* (if applicable)
- *Data* (state if youth was present – in their bed – at midnight)



DAP NOTE

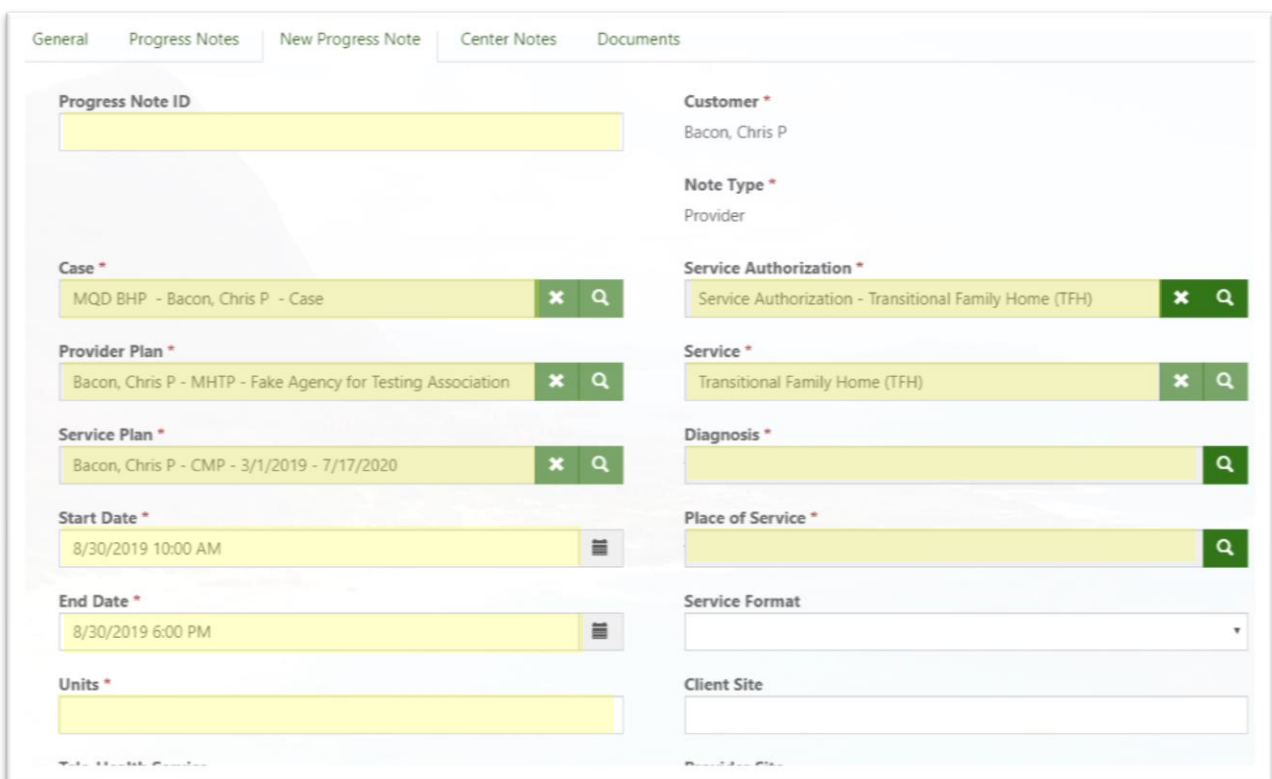
Data

Youth was present in the facility at 12am

- *Date Completed*
- Click **Save & Continue**
- To submit the Progress Note, click **Update** or **Submit to Approver Queue**

5.6 OUT-OF-HOME SERVICES (CBR, HBR) – AM / PM SHIFT NOTE

- Navigate to **Customers** in the green navigation bar at the top of the page, then select **Customers**
- Click on your Customer's name to open the Customer record
- Select the **Progress Notes** tab and click **+ Create**
- When the **New Progress Note** template opens, complete the following fields:
 - *Name* (rename the note: Overnight Shift - service dates)
 - *Service Authorization* (click on the  select the appropriate service auth and click **Select**)
 - *Start Date & Time*
 - *End Date & Time*
 - *Place of Service* (click on the  and select the appropriate location then click **Select**)
 - *Units* (**AM / PM Shift Note Units = 0**)



The screenshot shows the 'New Progress Note' form in the MAX - Provider Portal. The form is divided into two columns. The left column contains fields for Progress Note ID, Case, Provider Plan, Service Plan, Start Date, End Date, and Units. The right column contains fields for Customer, Note Type, Service Authorization, Service, Diagnosis, Place of Service, Service Format, and Client Site. Each field has a search icon and a close icon. The form is titled 'New Progress Note' and has tabs for General, Progress Notes, New Progress Note, Center Notes, and Documents.

- *Other Service Setting* (if applicable)
- *Data*
- *Plan*
- *Assessment*
- *Date Completed*
- Click **Save & Continue**
- To submit the Progress Note, click **Update** or **Submit to Approver Queue**

5.7 OUT-OF-HOME SERVICES (TFH, TRH) – DAILY NOTE

Note: The Daily Note is the billing moment for TFH / TRH Services.

- Navigate to **Customers** in the green navigation bar at the top of the page, then select **Customers**
- Click on your Customer's name to open the Customer record
- Select the **Progress Notes** tab and click **+ Create**
- When the **New Progress Note** template opens, complete the following fields:
 - *Progress Note ID* (rename the note: Daily Note - service date)
 - *Start Date & Time* (Note: these must be on the same day, i.e. 12:00 midnight to 7:00 am)
 - *End Date & Time*
 - *Place of Service* (click on the **q** and select the appropriate location then click **Select**)
 - *Units* (**Daily Note Units = 1**)

The screenshot shows the 'New Progress Note' form with the following fields and values:

Field	Value
Progress Note ID	
Customer *	Bacon, Chris P
Note Type *	Provider
Case *	MQD BHP - Bacon, Chris P - Case
Service Authorization *	Service Authorization - Transitional Family Home (TFH)
Provider Plan *	Bacon, Chris P - MHTP - Fake Agency for Testing Association
Service *	Transitional Family Home (TFH)
Service Plan *	Bacon, Chris P - CMP - 3/1/2019 - 7/17/2020
Diagnosis *	
Start Date *	8/30/2019 10:00 AM
Place of Service *	
End Date *	8/30/2019 6:00 PM
Service Format	
Units *	
Client Site	

- *Data* (state if youth was present – in their bed – at midnight)

The screenshot shows the 'DAP NOTE' form with the following content:

DAP NOTE

Data

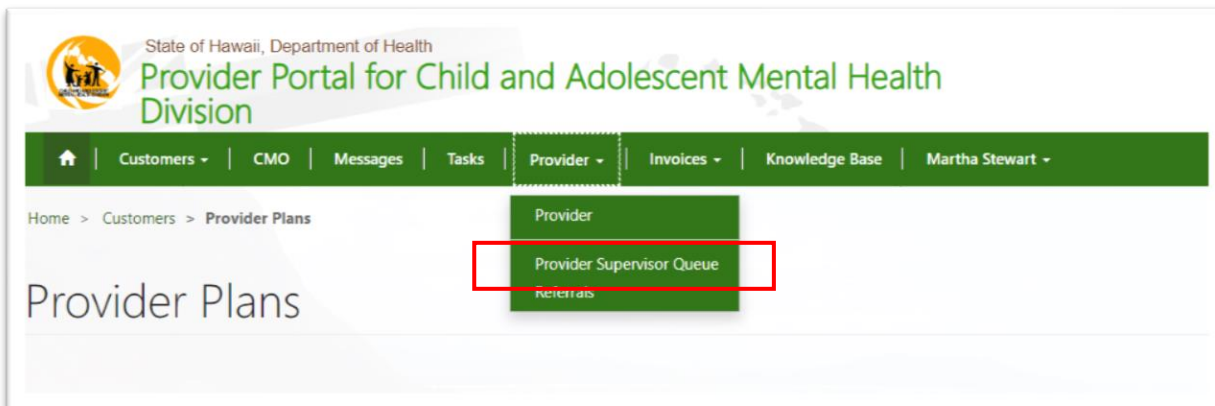
Youth was present in the home at 12am
Description of daily activities and behaviors...

- *Date Completed*
- Click **Save & Continue**
- To submit the Progress Note, click **Update** or **Submit to Approver Queue**

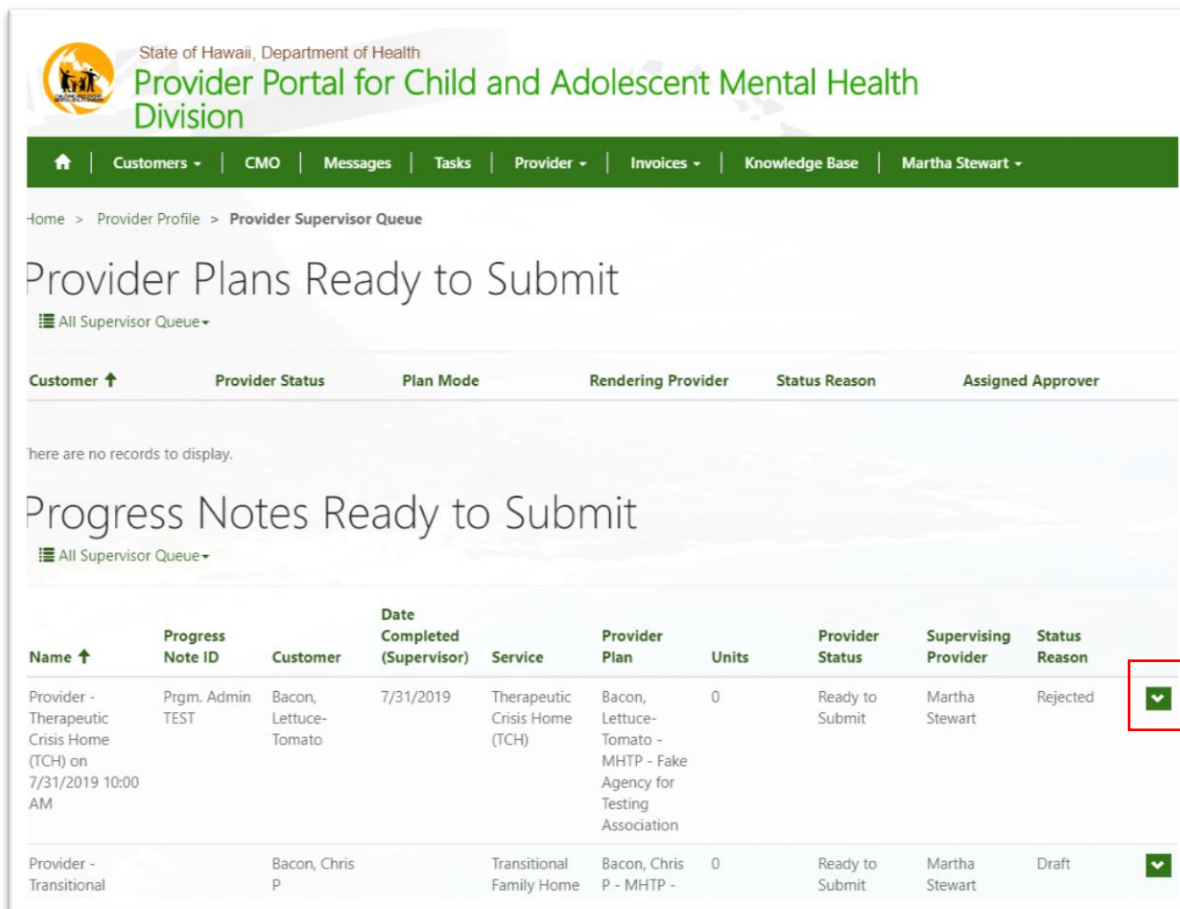
5.8 SUPERVISOR APPROVAL

Note: Only users with **Provider Administrator** and/or **Rendering Provider Supervisor** roles can approve Progress Notes.

- Navigate to the Provider Supervisor Queue from the drop down menu under Provider



- A list of Progress Notes Ready to Submit should be populated in the list. Click on the drop down arrow to Review/Approve



•

- Alternately, navigate by Customer in their Progress Note tab and clicking on the drop down arrow to Proceed to Submission

Bacon, Chris P

General Progress Notes Documents Center Notes

Web Portal - Active Progress Notes Create

Name	Start Date ↓	Service	Units	Provider Status	Date Completed (Supervisor)	Status Reason	
Provider - Transitional Family Home (TFH) on 8/29/2019 10:00 AM	8/29/2019 10:00 AM	Transitional Family Home (TFH)	0	Ready to Submit		Draft	View details
Provider - Transitional Family Home (TFH) on 8/26/2019 10:00 AM	8/26/2019 10:00 AM	Transitional Family Home (TFH)	0	Draft		Draft	Edit
Provider - Transitional Family Home (TFH) on 8/4/2019 10:00 AM	8/4/2019 10:00 AM	Transitional Family Home (TFH)	1	Processed	8/5/2019	Validated	Submission

- Once on the **Submission Form**, review the Progress Note and complete required fields in the Supervisor Signature section, then click **Submit the Progress Note**

SUPERVISOR SIGNATURE

Supervising Provider
Ralph Dibny

Provider Status *
Draft

Date Completed (Supervisor)
1/7/2019

Supervisor Acknowledgement *
Discussed Case With Therapist

Therapist Name (Supervisor Acknowledgement) *
R. Dibny

Additional Supervisor Notes

Date (Supervisor Acknowledgement) *
12/19/2018

Submit the Progress Note Back To Edit

- If the submission is successfully processed and no errors are found, the *Status Reason* will update to **Validated**

Note: Once the Progress Note is validated, it will be **Read Only**, meaning you can no longer edit it.

SIGNATURE

Provider *
HAWAII CARES FOR YOU

Additional Comments/Recommendations
—

Rendering Provider *
Juan Lewis

Date Completed (Rendering Provider)
10/30/2018

Provider Status *
Processed

Status Reason
Validated

Rejected Reason
—

- If there are any errors found during the validation process, the *Status Reason* will update to **Rejected** and a **Rejected Reason** will display

SIGNATURE

Provider *
HAWAII CARES FOR YOU

Additional Comments/Recommendations
—

Rendering Provider *
Juan Lewis

Date Completed (Rendering Provider)
11/8/2018

Provider Status *
Processed

Status Reason
Rejected

Rejected Reason
Rendering Provider's active credentials do not equal or exceed the credential level required on the service during date range of service dates.

- When a Progress Note is **Rejected**, you can edit and resubmit the Progress Note
- A list view of Active and Rejected Progress Notes for the Customer is located on the Customer **Progress Notes** tab

Home > Customers > Customer Progress Notes

Barnes, Kelly

General Progress Notes

Web Portal - Rejected Progress Notes Create

Web Portal - Active Progress Notes

Web Portal - Rejected Progress Notes

Completed (visor)	Service	Units	Provider Status	Status Reason	
Functional Family Therapy (FFT) on 11/8/2018	Functional Family Therapy (FFT)	2	Processed	Rejected	▼

A full list of rejection reasons and definitions are listed below

Error Message	MAX Meaning	Provider Follow-Ups
<i>Progress Note must be associated with an Active Case</i>	Case is not set to active	Contact FGC care coordinator to set the case to active
<i>Rendering Provider's active credentials do not equal or exceed the credential level required on the service during date range of service dates.</i>	Provider credentials were not active during time of service	Contact MIS Helpdesk (733-9309)
<i>Progress Note's Adjusted Units Exceeds the Available Units on the Service Authorization.</i>	Service authorization units have been completely used	Contact FGC care coordinator to discuss adding more units
<i>The Service Date/Times Overlap Service Date/Times for Other Progress Notes for the Customer, Provider and Rendering Provider.</i>	Service date/time overlap based on Customer and/or Rendering Provider	Correct overlap and resubmit
<i>This note is overlapping with another billable note for this Customer.</i>	Service date/time overlap with another billable note	Correct overlap and resubmit

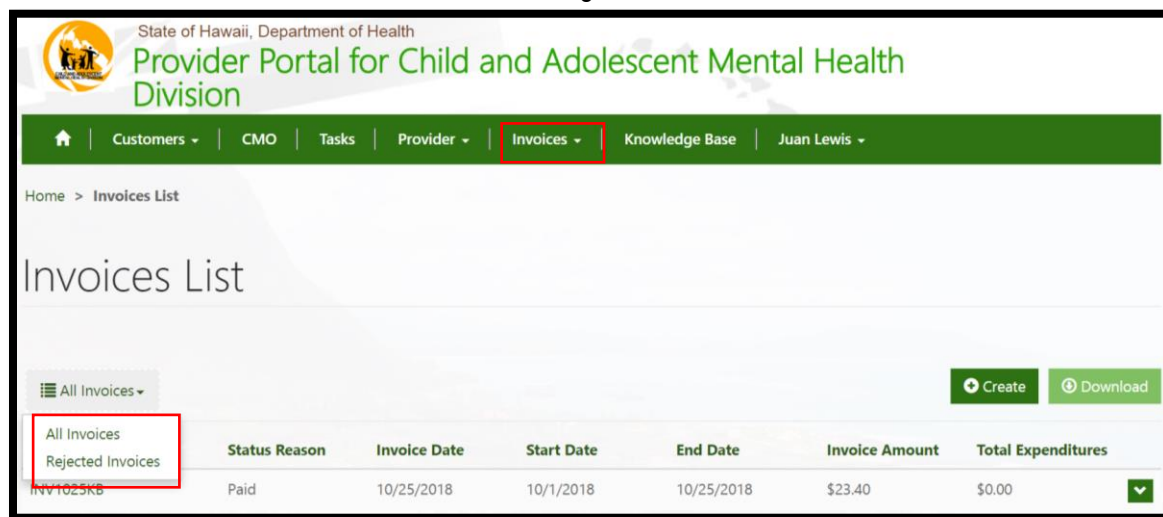
6 Invoicing

6.1 CREATE INVOICE

You must have a **Provider Administrator** role to access **Invoicing**.

Invoices can only be submitted on the 2nd and 4th Tuesday of each month. CAMHD Fiscal office processes these on the following Wednesday. There is an approximate 2-week turnaround from vouchering to check.

- Invoices are accessed from the main navigation bar



- Create a new **Invoice** by selecting **+Create**
- Enter the following:
 - *Invoice Number* (unique 10-character max identifier)
 - *Invoice date* (defaults to current date)
 - *Provider* (defaults to your provider agency)
 - *Provider Contract* (Select this by LOC and geographic location)
 - *Start and End Date* of the Invoice
- Next, click **Continue to Submit**
- This will create the **Invoice** Record and you will have the ability to edit additional details

Note. There are two types of invoices that can be created in the Provider Portal: (a) unit cost/fee for service contracts, and (b) cost reimbursement contracts.

6.2 EDIT UNIT COST/FEE FOR SERVICE CONTRACT INVOICE

When **Contract Type = Unit Cost**, the Provider will submit only Progress Notes and Invoices.

- Leave **Invoice Amount** blank (this will be calculated by CAMHD HSMO)
- **Associate Progress Notes** to the Invoice
 - To associate more than one Progress Note, select **Associate Multiple** in the Progress Note Section. Note: The pick list shows only validated Progress Notes.

- This will open a list of **Progress Notes** that fall within the **Invoice date range** and have not been associated to another Invoice

- This dialog shows in the description the date range it used to find unassigned **Progress Notes**

Progress Notes

This list shows Progress Notes which are match specified invoice start (10/01/2018) and end date (10/25/2018). If you have changed that dates you need to save the invoice to update this list. In case you have disassociated some progress notes after opening invoice and want this changes to be refreshed in this list, please refresh the page - [Refresh the Page](#)

Once you select desired progress notes you can click "Add Checked to Invoice" button - it will associate selected Progress Notes with Current Invoice and refresh the Page. [Bottom](#)

Name	Customer	Date	Service	Amount	Units	Status	
Functional Family Therapy (FFT) on 10/25/2018	Barnes, Kelly	2018-10-22	Functional Family Therapy (FFT)	4	Processed - Validated		<input checked="" type="checkbox"/>

[Close](#) [Add Checked to Invoice](#)

- You have the ability to deselect individual Progress Notes if necessary
- Once all Progress Notes are selected, click the **Add Checked to Invoice** button; this will close the form, refresh the page and update the Invoice with the selected Progress Notes
- Enter the required fields, **save** the form, then click **Submit the Invoice**
- You will receive a confirmation that the Invoice was sent for validation

Note. The submitted Invoice will become read-only. If the Invoice is rejected, it will become editable. It is possible to see submitted and rejected Invoices and view all associated Progress Notes.

CAMHD Fiscal Office will now review the Invoice and process payment if accepted, via the standard process for provider billing of unit-cost or fee-for-service contracts.

6.3 VIEW PROGRESS NOTE & ASSOCIATED INVOICE STATUS

- To view a list of Invoices, go to **Invoices -> Invoices** for the main navigation bar

Home > Invoices List

Invoices List



[All Invoices](#) [Create](#) [Download](#)


Invoice Number ↑	Status Reason	Invoice Date	Start Date	End Date	Invoice Amount	Total Expenditures
INV1025KB	Submitted	10/25/2018	10/1/2018	10/25/2018	\$23.40	\$0.00

- To find a view of Progress Notes with associated Invoices, go to **Invoices -> Progress Notes with Invoices** from the main navigation bar
- From the Progress Notes with Invoices page, you can view all the Progress Notes in the system for your Provider Agency and view their Associated Invoice Status
- If the **Status Reason** listed has an exclamation point icon next to it, that means there is any information about Status Reason available. To access the additional detail, **click the icon**

Progress Notes with Invoices

Progress Note with Invoices Status ▾

Search   Download

Name ↑	Customer	Customer ID	Service	Units	Service Rate	Amount	Start Date	Provider Status	Status Reason	Provider Invoice	Check #	Date Paid	Paid Amount	Invoice Status
Functional Family Therapy (FFT) on 10/25/2018	Barnes, Kelly	25204	Functional Family Therapy (FFT)	4	Functional Family Therapy (FFT) - \$23.40		10/22/2018 10:00 AM	Processed	Paid	INV1025KB				Paid
Functional Family Therapy (FFT) on 10/29/2018	Barnes, Kelly	25204	Functional Family Therapy (FFT)	4	Functional Family Therapy (FFT) - \$23.40		10/23/2018 2:00 PM	Processed	Validated					
Functional Family Therapy (FFT) on 11/8/2018	Barnes, Kelly	25204	Functional Family Therapy (FFT)	2			11/8/2018 10:00 AM	Processed	Rejected 					


Status Details

Rendering Provider's active credentials do not equal or exceed the credential level required on the service during date range of service dates.

- **Note:** You have the ability to download the full report in Excel format to work with it off-site.

Progress Notes with Invoices

Progress Note with Invoices Status ▾

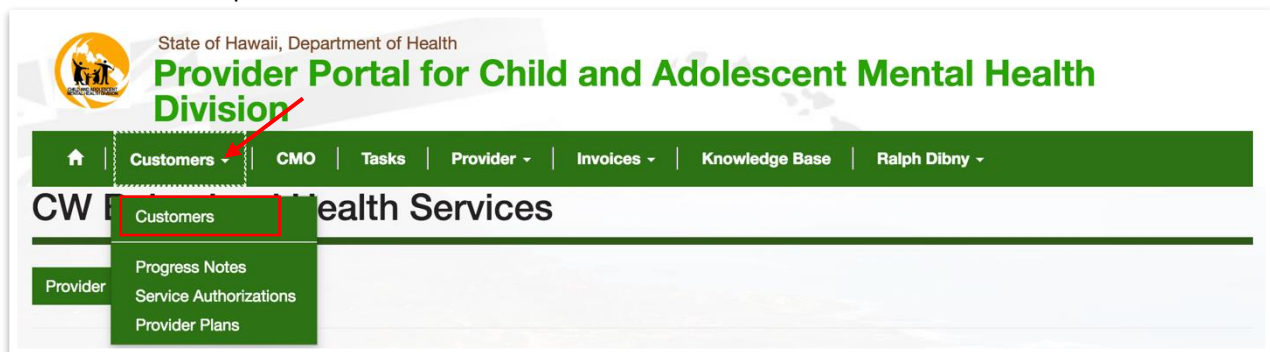
Search   Download

Name ↑	Service	Units	Service Rate	Amount	Start Date	Provider Status	Status Reason	Provider Invoice	Check #	Date Paid	Paid Amount	Invoice Status
--------	---------	-------	--------------	--------	------------	-----------------	---------------	------------------	---------	-----------	-------------	----------------

7 Extras

7.1 VIEWING CUSTOMERS

- Navigate to **Customers** in the green navigation bar at the top of the page, then select **Customers** from the dropdown list



- You can change the list view by clicking on a column heading to sort ascending / descending
- To view the Customer record, click on the **Customer** name

Note: By default, the **Customers** page only displays the Customers with an **Approved MHTP** (Billing MHTP).

Customers

Full Name ↓	Date of Birth	Last Four of SSN	Medicaid ID	Street 1	City	State	Zip Code
woman, iron	12/5/2013			12345 Hula St	Kihei	HI	96753
West, Wally	7/11/2002			2011 Central Cir.	Honolulu	HI	96818
Wayne, Bruce	12/6/1974			1234 Wayne Manor	Honolulu	HI	96825
TitanUp, Marcus	8/4/2013	8080		808 NFL Circle	Kalaepohaku	HI	96808
Thecat, Tony	1/3/2013			123 University Ave.	Kapolei	HI	96707
The cat, Pete	1/1/2010			123 Aloha Lane	Honolulu	HI	96816
South, Snowman	12/24/2005			1234 I don't know	Kaneohe	HI	96744

- On the Customer record, you will find general Customer information (address, contacts) as well as links to Assessments and Service Authorizations

Assessments


Assessment Type	Assessment Completed Date ↑	Assessment Expiration Date	Score	Case
CAFAS	11/12/2018	11/12/2019	170	MQD BHP - West, Wally - Case
Initial Mental Health Evaluation (IMHE)	11/12/2018	11/12/2019		MQD BHP - West, Wally - Case

- If you find Customer information that is incorrect or out-of-date, click **Create Change Request** and complete the form to notify the Care Coordinator

7.2 WILDCARD SEARCH

Lookup records

To search on partial text, use the asterisk (*) wildcard character.



Select	✓
Practice Name	Accessibility Promotion
Practice Category	Core Practices

TREATMENT TARGET OPTIONS

Externalizing Behaviors	Internalizing Behaviors	Positive Behaviors	Other Targets
Aggression	Anxiety	Academic Achievement	Adjustment to Life Transition
Anger	Avoidance	Activity Involvement	Attending to Basic Needs
Attention Problems	Depressed Mood	Assertiveness	Cognitive/Intellectual Functioning
Fire Setting	Grief	Community Involvement	Eating/Feeding Problems
Hyperactivity	Phobia/Fears	Contentment/Enjoyment/Happiness	Enuresis/Encopresis
Oppositional/Non-Compliant Bx	School Refusal/Tuancy	Empathy	Gender Identity
Peer/Sibling Conflict	Self-Esteem	Peer Involvement	Health Mgmt/Medical Reg Adhere
Runaway/Elopement	Self-Injurious Behavior	Positive Family Functioning	Impulsivity
Substance Use	Suicidality	Positive Peer Interaction	Independent Living Skills
Willful Misconduct/Delinquency	Traumatic Stress	Positive Thinking/Attitude	LD/Underachievement
		Self-Management/Control	Mania
		Social Skills	Occupational Functioning/Stress
			Personal Hygiene
			Psychosis
			Sexual Misconduct
			Sleep Disturbance/Sleep Hygiene
			Treatment Engagement

* Definitions can be found here: https://health.hawaii.gov/camhd/files/2019/10/TF-TT-PE-and-PR-Codebook-2019_10_24.pdf

PRACTICE ELEMENT OPTIONS

Behavior Management	Coping/Self-Control	Core Practices	Other Practices
Attending	Activity Scheduling	Accessibility Promotion	Anger Management
Behavioral Contracting	Assertiveness Training	Cognitive/Coping	Assessment
Commands/Limit Setting	Biofeedback/Neurofeedback	Family Engagement	Care Coordination
Discrete Trial Training	Communication Skills	Insight Building	Catharsis
Functional Analysis	Exposure	Motivational Interviewing	Crisis Management
Ignoring/DRO	Goal Setting	Psychoed w/ Child	Cultural Training
Line of Sight Supervision	Guided Imagery	Psychoed w/ Parent or Teacher	Educational Support
Modeling	Hypnosis	Relationship/Rapport Building	EMDR
Natural & Logical Consequences	Maintenance/Relapse Prevention	Supportive Listening	Family Therapy
Parent or Teacher Monitoring	Mindfulness		Free Association
Parent or Teacher Praise	Personal Safety Skills		Ind. Therapy for Caregiver
Response Cost	Physical Exercise		Interpretation
Stimulus/Antecedent Control	Problem Solving		Marital Therapy
Tangible Rewards	Relaxation		Medication/Pharmacotherapy
Therapist Praise/Rewards	Response Prevention		Mentoring
Time Out	Self-Monitoring		Milieu Therapy
	Self-Reward/Self-Praise		Narrative
	Skill Building		Parent Coping
	Social Skills Training		Peer Pairing / Peer Modeling
			Play Therapy
			Strengthening Informal Supports
			Twelve Step Programming

* Definitions can be found here: https://health.hawaii.gov/camhd/files/2019/10/TF-TT-PE-and-PR-Codebook-2019_10_24.pdf

PROGRESS RATINGS

- 1 - Deterioration <0%
- 2 - No Significant Changes 0% - 10%
- 3 - Minimal Improvement 11% - 30%
- 4 - Some Improvement 31% - 50%
- 5 - Moderate Improvement 51% - 70%
- 6 - Significant Improvement 71% - 90%
- 7 - Complete Improvement 91% - 100%