RI-BHOLD STATE REPORTING RELEASE NOTES

RI-BHOLD VERSION 1.48   REQUIRES ECHOVANTAGE VERSION 3.16 OR HIGHER

OVERVIEW

The RI-BHOLD State Reporting Acorn addresses the requirements for submitting Clients' admission, discharge, and event data to Rhode Island's Behavioral Health On-Line Database (BHOLD) on a monthly or more frequent basis. The Acorn makes use of both core and custom tables to collect the state-required data elements. After the BHOLD State reporting job is created, a zip file is available for download.

INSTALLING THE ACORN

Echo support will contact you to determine the best time to install this version—the installation inserts one *STATE_REPORT* type Acorn Registration with a Display name of *BHOLD.* The Acorn also installs custom tables and mapping forms. Note that the agency created custom forms are not loaded with the Acorn, but the custom tables that support these forms are installed if they do not already exist. The agency custom forms must be installed separately and be accessible and in use for all state-required data elements to be captured.

Forms

- BHOLD Program Code Mapping
- BHOLD Payer Category
- BHOLD Kept Attendance Codes
- BHOLD Face To Face Activities

Tables

Mapping Form Tables

- dbo.BHOLDProgramCodeMapping
- dbo.BHOLDPayerMapping
- dbo.BHOLDKeptAttendanceCodes
- dbo.BHOLDFaceToFaceActivities

Agency Custom Form Tables (Installed with Acorn if it does not exist.)

- dbo.RI_CommProgressNote
- dbo.RI_DischargeSummary
- dbo.RI_MedicalHistory
- dbo.RI_Registration
- dbo.RI_SubAbuseForm
- dbo.RI_VitalSigns
- dbo.demo_DLA20

CONFIGURING THE APPLICATION

Mapping Forms

BHOLD specific forms are created for mapping existing data in EchoVantage. The forms and associated tables are installed with the Acorn, as listed above. These new forms are installed with a *MENU* Form Location and must be added to the *FORMS* main menu item in *Configuration > Setup > Forms.*
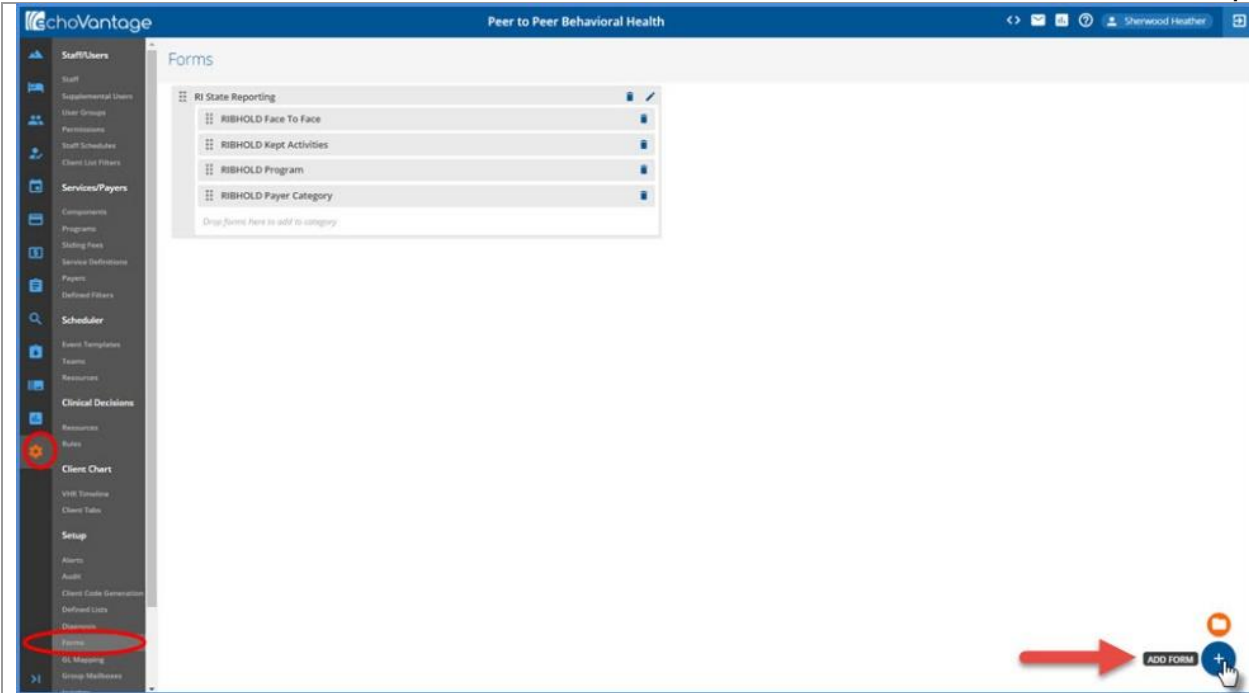
Once complete, any user using the forms must be a member of a User Group that has access to the menu option AND forms in *Configuration > Staff/Users > User Groups > Menu Options.*
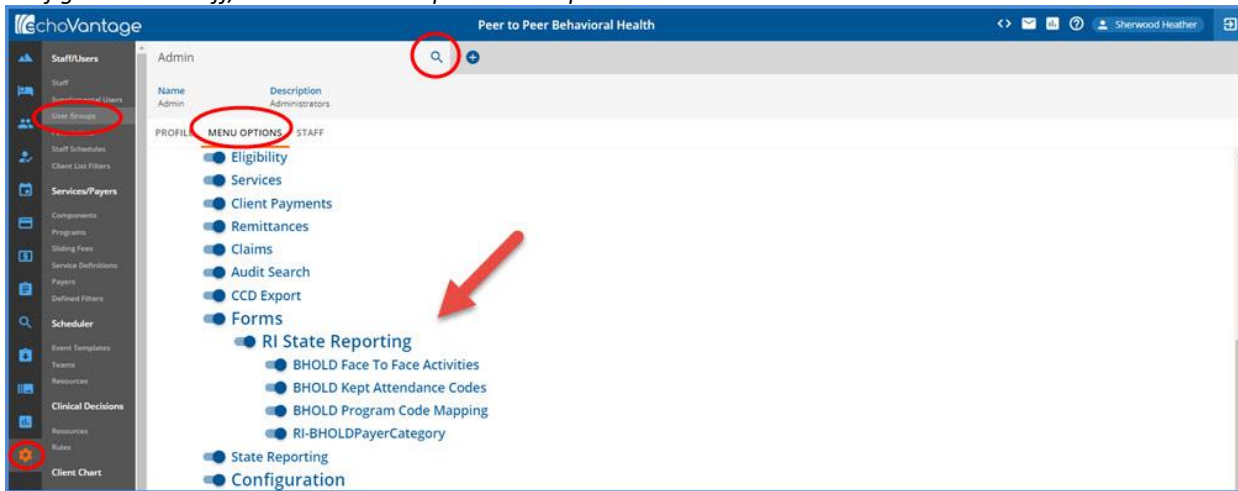
The forms can now be accessed from the main menu using the *Forms* icon.
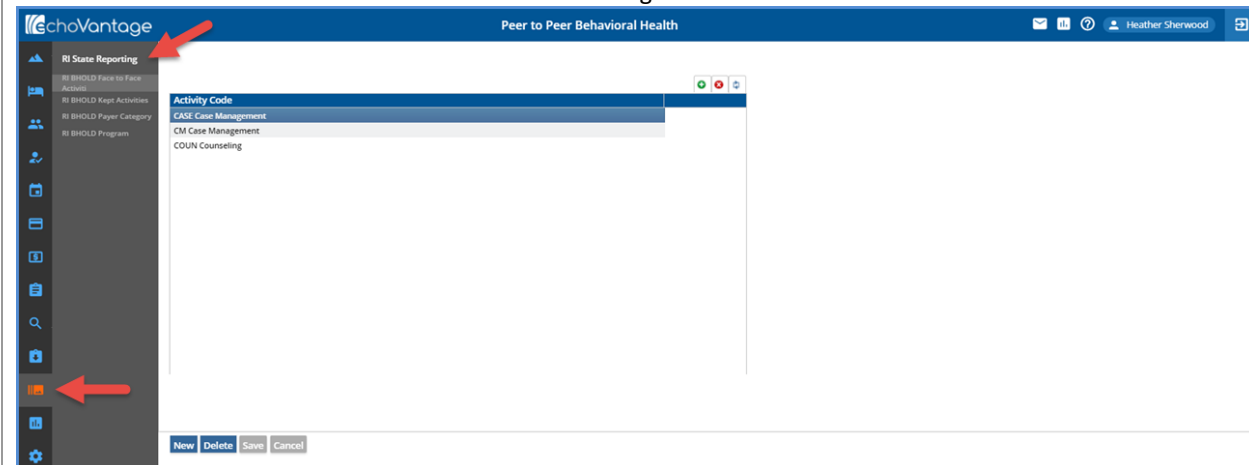
Complete the required fields on each form, remembering to save when additions or changes are complete. Additional entries may be made by clicking on the green plus "+" or selecting the blue *New* button. An existing entry may be updated by double-clicking on the row. The following is a description of each form.

- **BHOLD Face To Face Activities** – Use to identify the Activity codes that qualify as Face-to-Face per BHOLD definition. The drop-down list is populated with the Activity (core label, component 3) values**.**

- **BHOLD Kept Attendance Codes** – Use to Identify the Attendance codes that are considered "Kept" for BHOLD reporting. The drop-down list is populated with the Attendance (core label, component 4) values.

- **BHOLD Payer Category** – Use to map existing Payer Categories to BHOLD Primary Payment Source and Contract ID if applicable.
  - Payer Categories are defined in the *Configuration > Services/Payers > Payers > Profile* tab.
  - *Payer Category* is a defined list in *Configuration > Setup.*

- **BHOLD Program Mapping** – Use to map existing Programs and Subprograms to BHOLD program codes, PID, and PID City Code.
  - The **Program** drop-down list is populated with the Program (core label, component 1) values.
  - **Sub Programs** are defined in *Configuration > Services/Payers > Programs.*
  - The **BHOLD Program Code** and **PID City Code** drop-down lists are populated with BHOLD values as of the date of this Acorn release.
  - **PID** is a free text field for the agency to provide the appropriate state-assigned **P**rovider **ID**.

Agency Custom Forms

Note that the Agency Custom Forms must be installed and available for use within EchoVantage. These forms collect the BHOLD Data Elements that are not captured within the application's core tables. Please reference the Data Mapping section for details on capturing the Data Elements, including the table and column information, used for reporting. The forms used for BHOLD State Reporting are as follows:

- **RI Discharge Summary**
- **RI Medical History**
- **RI Registration**
- **RI SubUseForm**
- **RI Vital Signs**
- **DLA-20**

Defined Lists

The following Defined Lists must contain the BHOLD Code values per the Data Dictionary. The agency should review these values and update as needed when the state of Rhode Island releases a new Data Dictionary. Navigate to *Configuration > Setup > Defined Lists*:

- **Gender Identities –** The *GENDERID* Valid Codes must be entered as the *Code* in the Defined List.
  - The field is populated using the Gender Identity drop-down list on the Client's Profile tab.
  - The value reported is from the GenderIdentity column from the Client's record in dbo.Clients.
- **Sexual Orientation –** The *SEXORIENT* Valid Codes must be entered as the *Code* in the Defined List.
  - The field is populated using the Sexual Orientation drop-down list on the Client's Profile tab.
  - The value reported is from the SexualOrientation column from the Client's record in dbo.Clients.
- **Employment Status –** The *EMPSTAT* Valid Codes must be entered as the *Code* in the Defined List.
  - The field is populated using the Employment Status drop-down list on the Client's Profile tab.
  - The value reported is from the EmploymentStatus column from the Client's record in dbo.Clients.
- **Living Arrangements –** The *RESARR* Valid Codes must be entered as the Code in the Defined List.
  - This value is entered on the Household tab.
  - The BHOLD report selects this value from the LivingArrangment column on the current, active dbo.ClientLivingArrangements record for the Client.

It is recommended that the following Defined Lists be populated with the BHOLD Valid Codes for each Data Element. However the Acorn will map the default values to Valid Codes as outlined in the Data Element mapping document if the BHOLD Valid Codes are not present.

- **Marital Status –** This populates the *MARSTAT* Data Element. The value is entered on the *Client > Profile* tab.
- **Veteran Status –** This populates the *VETSTAT* Data Element. The value is entered on the *Client > Profile* tab.
- **Payer Categories** - This list may be updated to the BHOLD Valid Codesbut is not required. The Acorn installs a Payer Category Mapping form to match the Payer Category with a Primary Payment Source and Contract ID if applicable.

MID Data Element

The MID (Medicaid ID Number) Data Element is a 10-digit unique Medicaid identifier. Per the data dictionary, "This field is mandatory if the Client has Medicaid or Managed Care Medicaid for their insurance type." The MPI field on the *Clients > Profile* tab should be populated with their MID if they have Medicaid or Managed Care Medicaid for their insurance types.

The application configuration is now complete. Follow the typical workflow for admitting Clients, completing Assessments, providing Services, billing for Services, and updating Enrollment and Discharge information.

CREATING STATE REPORTING FILES

The State Reporting screen has a similar look and workflow to the Fiscal Overview functions. The State Reporting screen has the *CREATE, HISTORY,* and *ERRORS* tabs.

CREATE

Once the Acorn is installed, "BHOLD" appears as an option in the Report Type drop-down list on the *CREATE* tab.

- Select BHOLD for the Report Type.
- Enter the Date Range to use for gathering data. The dates default to the previous month's Start and End Dates.
- Leave Clients empty to choose ALL Clients or select Clients to create a reporting file for specific Clients or a single Client.
- Click Save to create the job.
- When a job is created for all Clients:
    o Clients must have the following to be included:
        ▪ An active and mapped non-excluded Client Payer.
        ▪ And an Open Enrollment during the date range or Closed Enrollment with a discharge date that is later than the reporting period Start Date.
        ▪ And an Enrollment Program that has been mapped to a BHOLD Program Code, PID, and PID City Code.
    o Clients with a discharge date before the reporting period Start Date are excluded.
    o Clients with Payers that have a Payer Category marked as Excluded on the mapping form are excluded.
    o Clients with an Enrollment Program that is not mapped on the BHOLD Program Code mapping form are excluded.
- When a job is created for a specific Client or Clients, the selected Clients are always included.
    o The Payer Category exclusion on the Payer Category Mapping is overridden.
    o The Program Code Mapping is overridden.
    o Even though the Mapping forms are overridden, an Error is still generated if the Client has an excluded Category or does not have a mapped Program.

HISTORY

- View Job Status on the History tab.

- o Options to *Finalize*, *Reverse*, or *Retry* are available for any Job in Preview Status.
- o A count displays in the Errors column if the job contains Errors.
- o **Jobs should be Reversed and run again if changes are made to the Client Payers or Enrollment Programs.**
- The output file may be downloaded for review and submission. The job does not need to be Finalized first.
  - o Select the .zip file download the submission file from the History tab.
  - o Files are downloaded to the user's local Downloads folder.
  - o It may be desirable to keep the job in *Preview* status and wait to *Finalize* until the file has been successfully submitted without errors to the state.

ERRORS

CREATE	HISTORY	**ERRORS**		
09/03/2020 5:01 pm: heather.sherwood - BHOLD			× ▾	
Clients	**End Date**	**Start Date**		
3 values	2020-08-31	2020-08-01		
Client			Message	Severity
CLI0000 Client, Behold			Client missing Frequency of Use – Primary Substance	ERROR
asdf0000 ANDI, ME			Client missing Frequency of Use – Primary Substance	ERROR
CLID0000 Client, December			Client with id 20191223035904832A170943607D74C25A04 is not in a BHOLD program	ERROR

- Navigate to the Errors tab to review Errors.
- Select a job from the drop-down list to display a job's Errors.
- The Message provides details regarding the cause of the error.
- The blue code and names in the Client column link directly to that Client in the Clients menu.
- Missing information for required Data Elements fail validation and throw an error.
- Running a job for specific Clients can result in Errors due to an unmapped Program or excluded Payer Category.

CAPTURING THE DATA

The RI-BHOLD Data Element Mapping document lists all of the Data Elements in the order of the output file, as of the RI-BHOLD Client Data Dictionary version 3 dated October 17, 2019. The mapping includes columns to indicate if the element is required, where it is captured in EchoVantage, and the table and column name where the information is stored. The Notes provide additional information for the Data Element, such as how a result is selected or if the stored value is translated into a report specific Valid Code.