



# RI-BHOLD STATE REPORTING RELEASE NOTES

RI-BHOLD VERSION 2.0.135

REQUIRES ECHOVANTAGE VERSION 3.28 OR HIGHER

## OVERVIEW

RI\_BHOLD Version 2.0.135 contains the following updates.

- **DISLASTDATE** – (EV-2261) The query for finding the last Face to Face contact date after an internal transfer was updated. The Acorn now pulls the Service that meets the following requirements.
  - The Service date is on or before the DISDATE.
  - The Service date is on or after the Enrollment Start Date
  - The Service Attendance component code is a mapped BHOLD Kept Attendance code.
  - The Service Program component matches the Program of the discharged Enrollment.
- **Discharge Data Elements** – (EV-2287) The changes in v2.0.129 to update how the DISDATE was populated limited the Internal Transfer Note to be on or before the State Reporting Period End Date. The query was updated and now the Acorn correctly reports the Discharge Data Elements when an Internal Transfer Note is found up to 2 days before/after the Enrollment End Date, even when the dates cross months. For example,
  - The Acorn will report pull the values needed from an Internal Transfer Note with an Effective Date of Transfer of 02/26/2021, 02/27/2021, 03/01/2021, or 03/02/2021 for an Enrollment with a 02/28/2021 End Date.
  - For that same Enrollment, if the Internal Transfer Note is dated on or before 02/25/2021 or on or after 03/03/2021, the Acorn will report the defaults for the remaining Discharge Data Elements and throw the warning that *Episode or Enrollment was closed for Client XXX but no associated discharge or internal transfer record was found.*

## INSTALLING THE ACORN

The *install-ri-bhold-2.0.135.sql* script updates the *BHOLD* record in the *dbo.AcornRegistrations* table to version *2.0.135.RELEASE*. This installation also updates the *Help > About* page found by clicking on the Help icon on the blue Application Information Bar. SaaS hosted customers should send a request via the Support portal to authorize the update.

The Acorn also installs custom tables and mapping forms. Note that the agency created custom forms are not loaded with the Acorn. The agency custom forms must be installed separately and in use for all state-required data elements to be captured.

### **BHOLD Mapping Forms**

- BHOLD Program Code Mapping
- BHOLD Registration Face To Face Activities (This was previously the BHOLD Face to Face Activities form.)
- BHOLD Kept Attendance Codes
- BHOLD Payer Mapping
- BHOLD Gender Identity Mapping
- BHOLD Sexual Orientation Mapping
- BHOLD Discharge Face To Face Activities

### **Mapping Form Tables**

- *dbo.BHOLDProgramCodeMapping*
- *dbo.BHOLDFaceToFaceActivities*
- *dbo.BHOLDKeptAttendanceCodes*
- *dbo.BHOLDPayerMapping*
- *dbo.BHOLDGenderIdentityMapping*
- *dbo.BHOLDSexualOrientationMapping*
- *dbo.BHOLDDischargeFaceToFaceActivities*

### **Required Agency Custom Forms**

- RI Registration
- RI Target Condition
- RI Substance Use Form
- RI Vital Signs



- RI Internal Transfer Note
- RI Discharge Summary
- Client DLA-20 Adult

## CONFIGURATION OVERVIEW

### Mapping Forms

The BHOLD Mapping forms must be configured for use in *Configuration > Setup > Forms* and users responsible for mapping the BHOLD data must be granted access in *Configuration > Staff/Users > User Groups > Menu Options*. The mapping forms are

- **BHOLD Program Code Mapping** – Use to map existing Programs and Subprograms to BHOLD program codes, PID, and PID City Code.
- **BHOLD Registration Face To Face Activities** - This was previously the BHOLD Face to Face Activities form. Use to identify the Activity codes that qualify as Registration Face-to-Face activities per the 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 Mapping** – Use to map Payers to BHOLD Primary Payment Source and Contract ID (if applicable).
- **BHOLD Gender Identity Mapping** – Use to map values in the Gender Identities Defined List to valid BHOLD data element values.
- **BHOLD Sexual Orientation Mapping** – Use to map values in the Sexual Orientations Defined List to valid BHOLD data element values.
- **BHOLD Discharge Face To Face Activities** - Use to identify the Activity codes that qualify as Discharge Face-to-Face activities per the BHOLD definition. The drop-down list is populated with the Activity (core label, component 3) values.

### Defined Lists

It is recommended that the following Defined Lists contain the BHOLD valid codes for each Data Element. However, the Acorn will map the Defined List default values to the BHOLD valid codes as outlined in the BHOLD Data Element Mapping v5 if the BHOLD valid codes are not used.

- **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 Codes but 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.***

## FUNCTIONAL OVERVIEW

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:
  - Clients must have the following to be included:
    - An Open Enrollment during the date range or Closed Enrollment with a discharge date that is later than the reporting period Start Date and before the reporting period end date.



- An Enrollment Program that has been mapped to a BHOLD Program Code, PID, and PID City Code.
      - Clients with a discharge date before the reporting period Start Date are excluded.
      - Clients with Payers that have a Payer marked as Excluded on the mapping form are excluded.
      - 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.
    - The Program Code Mapping requirement is overridden.
    - Clients with excluded Payers are included in the job.
    - Even though the Mapping forms are overridden, an Error is still generated if the Client does not have a mapped Program.
  - In addition to the active Enrollment with a mapped Program listed above, the following eleven (11) data elements (listed in **RED** in the *RI BHOLD Data Element Mapping v5*) are required to create a valid State Reporting file. These Data Elements do not have a default value and the column referenced in the data mapping must not contain a NULL in the database. For FTRTDATE, the Service cannot be before the Client’s current Episode Start Date or after the Client’s current Episode End Date.

RECNUM	PID	ADMITDATE	NAMEFRST
SSN	PROGRAM	PIDCITY	NAMELST
DOB	FTRTDATE	DIAG1	