OK CDC PA STATE REPORTING RELEASE NOTES

OK CDC PA – VERSION 1.0.99.RELEASE   REQUIRES ECHOVANTAGE VERSION 3.32 OR HIGHER

DOCUMENT HISTORY

Date	Description	Author	Version
01/28/2022	Initial Release	Heather Sherwood	1.099.RELEASE

OVERVIEW

The OK CDC PA State Reporting Interface provides a method to validate and submit to the state of Oklahoma data collected via an agency created form for the purpose of obtaining a Prior Authorization (PA) response. The form can be completed by the clinical staff and then use the interface to solicit a response from the state in real-time, instead of sending bulk batches and waiting for the replies.
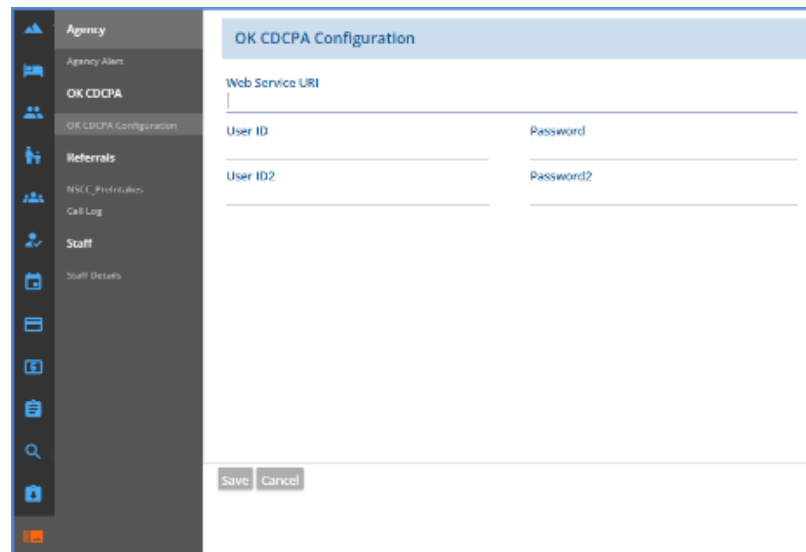
INSTALLING THE CATKIN

The installation inserts a Catkin Registration record: *OKCDCPA, Version 1.0.99.RELEASE* in the dbo.CatkinRegistrations table. After installation is complete, the Catkin version displays in the Help > About page under the *Catkins* section. The install script also installs the following forms, tables, and stored procedure if they do not already exist.

- Grand Client Data Core Form
- dbo.GrandClientDataCore
- OK CDCPA Configuration Form
- dbo.ConfigOkCdcPa
- Grand CDC Error Form
- dbo.CDCPAErrors
- dbo.CDCPASubmissions
- dbo.CDCProgramProcedureCode_val

- dbo.CDCSatelite_val
- dbo.CDCProblem_val
- dbo.CDCReferral_val
- dbo.CDCAgency_val
- dbo.CDCEducationLevel_val
- dbo.CDCCountyofCommit_val
- dbo.CDCDrugofChoice_val
- dbo.sp_OkCdcPa_ClientDataCoreValidation

After the Catkin is installed, a data population script is run to populate the validation entries for the GRAND ClientDataCore Form.

CONFIGURING THE APPLICATION

The Catkin installs the OK CDCPA Configuration form and makes it available in the *FORMS* menu for members of the Admin User Group. Manage access to this form in *Configuration > Staff/Users > User Groups > Menu Options.* Enter the URL and credentials for the OK Department of Mental Health and Substance Abuse Services on this form - these credentials are used when the Validate button is selected on the Grand Client Data Core Form.

Also ensure the appropriate User Groups have access to the Grand Client Data Core Form. Form access is controlled in the VHR Timeline Header in *Configuration > Client Chart > VHR Timeline.* This form is used for data collection and submission.

PA/VALIDATION ON THE CLIENT DATA CORE FORM

The *PA/VALIDATION* tab of the agency created Client Data Core Form is used to view and manage the CDC submission process. New forms and validated forms that still have errors do not have a populated Submit Date on the first (Section 1) tab.

Once sections one through three of the form are complete (the first five tabs), navigate to the PA/VALIDATION tab.

Select the blue *Validate* button to submit the collected data to the state of Oklahoma.

A loading spinner displays while the validation takes place. When complete, a message displays indicating if the record was submitted and the count of errors found, if any. To view the error details, select the blue *Navigate* button.

Errors are stored in the dbo.CDCPAErrors table. After reviewing and correcting the errors, validate the CDC form again. On validation, existing errors associated with that record are cleared, and new errors, if any, are recorded when the validation is complete.

When a form is successfully submitted without errors,

- The **CDC Key** field in the PA Section is populated with the authorization provided by the state of Oklahoma.
- In the Validation section,
  - The **Validation Date** is populated with the current date.
  - The **Has Errors** field is populated with value *2 No Errors – Submitted Successfully.*
- The **Submit Date** field on the first tab (Section 1) is populated with the date of the successful submission.

- A copy of the submission with the Submit Date is stored in the dbo.CDCPASubmissions table.

AGENCY LEVEL VALIDATION

A customizable stored procedure, dbo.sp_OkCdcPa_ClientDataCoreValidation, is provided for the addition of agency level validation. The stored procedure is triggered on validate and runs before the submission to the state.

An example on how to add the validation is in the stored procedure as pictured below.

```
ALTER PROCEDURE [dbo].[sp_OkCdcPa_ClientDataCoreValidation]
        @Client CHAR(36), @AppUserId CHAR(36), @ClientDataCore CHAR(36) AS
        BEGIN
            -- Do validation here to insert errors into dbo.CDCPAErrors
            -- Example:
            --
            -- IF EXISTS (SELECT 1 FROM GrandClientDataCore WHERE id = @ClientDataCore AND <some error condition> )
            -- BEGIN
            --     INSERT INTO CDCPAErrors (id, Client, ClientDataCore, ErrorCode, ErrorMessage, ErrorField,
            --                             CreateDate, UpdateDate, CreateUser, UpdateUser)
            --     VALUES (dbo.NEWSMARTGUID(), @Client, @ClientDataCore, 'TEST01', 'Test Error Message',
            --             'SomeField', CURRENT_TIMESTAMP, CURRENT_TIMESTAMP, @AppUserId, @AppUserId)
            -- END
            --

            DECLARE @ErrorCount INT = (SELECT COUNT(*) FROM CDCPAErrors WHERE ClientDataCore = @ClientDataCore)

            UPDATE dbo.GrandClientDataCore
            SET ReadyForSubmission = CASE WHEN @ErrorCount = 0 THEN '1' ELSE '0' END
            WHERE id = @ClientDataCore
        END
```