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AGENDA

Contract Providers Transition Team (CPTT) Workgroup Meeting
Thursday, November 6, 2014

- ✓ **Welcome and Announcements (2 min.)** Gordon Bunch
- ✓ **WebEx Instructions (3 min.)** John Flynn
- ✓ **IBHIS Update (20 min.)** Gordon Bunch
- ✓ **Integration Update: Provisioning/Web Services (20 min.)** Integration Team
- ✓ **IBHIS Claims Certification Process (10 min.)** Sandra Rodriguez
- ✓ **Provider Connect Update (5 min.)** Jim Spallino
- ✓ **IBHIS Reports and Extracts (5 min.)** Presley Becerra
- ✓ **IBHIS Readiness Workflow (20 min.)** Racheal Burgess
- ✓ **E-Signatures (5 min.)** Gordon Bunch
- ✓ **Questions/Comments (30 min.)**

hope wellness recovery

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IBHIS UPDATE

Gordon Bunch

CPTT Workgroup Meeting
November 6, 2014

IBHIS Update Overview

- IBHIS Update
- Rollout Group Selection
- IBHIS and IS Claiming during transition
- Questions

IBHIS Update

- Four Legal Entities (LEs) went live to IBHIS between February and May 2014
  - Foothill Family Service
  - Five Acres
  - Pacific Lodge Youth Services
  - Community Family Guidance Center
- LE Rollouts suspended in June
  - Need for automation of practitioner maintenance
  - Need for “Get Financial Eligibility” functionality via web services
  - Improvement in claims processing

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IBHIS Update

- Target to resume LE Rollouts - February 23, 2015
  - Start with 2 to 4 LEs that have a different mix of services from the group that are currently live
    - Day Treatment
    - Inpatient, if possible
  - The resumption of LE go-lives corresponds with and is contingent on release of Web Services "Get Financial Eligibility" functions, allowing time for EHR vendor development and contractor testing

IBHIS Update

- If February 23, 2015 rollout is successful, it will be followed by a rollout of 20 LEs in late March 2015
- Coincides with with the release of automated practitioner maintenance from the Practitioner Registration and Maintenance application to IBHIS
- Subsequent rollouts will have no more than 26 LEs

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IBHIS Update

- With the exception of the first Rollout Group, the duration of each rollout period will be 7 weeks and production access to Web Services will be given no more than two weeks in advance of go-live
- 7 week duration period begins at claiming go-live; two week production access to Web Services is not included in the duration period
- Since the first group is small, the duration of this rollout will be 4 weeks

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IBHIS Update

- Within each 7 week Rollout Group:
  - The first half of the Rollout Group go live to IBHIS in weeks 1 to 2 of the rollout period
  - The second half of the Rollout Group go live to IBHIS in weeks 3 to 4 of the rollout period
  - Weeks 5 through 7 of each rollout period will be used for observation, support, and maintenance
- Anticipate Six Rollout Groups
- Anticipate LE rollouts <u>ending</u> Oct./Nov. 2015

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IBHIS Update

- The last LE Rollout closely corresponds to the October 1, 2015, ICD-10 go live date
- As a contingency, DMH is requesting modification of the IS to meet ICD-10 requirements
- State has not taken a position on DSM-V rollout relative to ICD-10
- Anticipated IS shutdown - 12/31/16*

*Board Approval Pending

Determining Rollout Group Participants

- Primary Determinant: The date upon which you achieve both EDI claims certification and Web Services certification
  - First Dually Certified = First selected to Go-Live
- Some exceptions to this may apply
  - Day Treatment Providers may be placed in a later group
  - Inpatient Providers may be placed in a later group

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Determining Rollout Group Participants

- Following preliminary placement in a Rollout Group, final placement will be established by mutual agreement, when possible

IBHIS and IS Claiming: Tentative Transition Plan

- At go-live, LEs will submit to IBHIS all claims for services rendered in the fiscal year of their transition that were <u>not previously submitted to the IS</u>
- Claims for services rendered in fiscal years prior to the transition fiscal year must be submitted to the IS before 6/30/16 (anticipated IS claims cutoff date)
- After 6/30/16 only IS Replacement and Void claims can be submitted to the IS, but only through 10/31/16

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IBHIS and IS Claiming: Tentative Transition Plan

- If you obtain production access to Web Services in advance of your claims go-live date:
  - All new clients* and client updates must be entered into IBHIS only from your web services production date forward
  - Claims for services rendered in your IBHIS transition fiscal year not entered into the IS before your Web Services production date must be held until your IBHIS claims go-live date

* Upon receiving production access to IBHIS, LEs must continue to use the IS to create medication orders for the indigent (CGF) population only. This includes creating a new client record and/or episode in the IS.

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QUESTIONS

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CONTRACT PROVIDERS INTEGRATION

Integration Team

Contract Providers Transition Team (CPTT)
Workgroup Meeting
November 6, 2014

Overview

- Team Members/Resources
- Community Outreach Services
- Provisioning
- IBHIS Certification
- Integration Support
- Trading Partner Integration

Integration Team Members

- Provisioning Lead – Ceci Bolanos
- IBHIS Certification Process
  - Client Services Lead – Abel Rosales
  - EDI Claims Lead – Thelma Gonzalez
- Integration Support Lead – Sylvia Liu
- Integration Lead – Juan Fermin

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Community Outreach Services (COS)

- Legal Entities (LEs) with EHR systems will claim COS services via 837
- Claiming process for LEs without an EHR who are providing COS ONLY will be determined prior to Integrated System (IS) shutdown
- LEs providing COS ONLY will continue to enter COS services in the IS until a different method of submitting COS services for this group of providers is determined and implemented

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PROVISIONING

Ceci Bolanos

Provisioning Overview

- Provisioning consists of:
  - Trading Partner Agreement (TPA) Process
  - Digital Certificate Process
  - Connectivity Testing

Trading Partner Agreement (TPA) and Digital Certificate Process

- As of October 2014:
  - 121 out of 123 Legal Entity Trading Partners have completed the TPA and installed their digital certificate
  - Please notify TPA@dmh.lacounty.gov regarding any changes in the following areas:
    - Trading Partner Information
    - Technical Contact Information
    - Biller Information
    - Clearinghouse Information
    - Software Vendor Information
    - Consultant Information
    - Business Contact Information

Connectivity Testing

- As of October 2014:
  - 120 of 123 Legal Entity Trading Partners have completed connectivity testing
- File Transfer Protocol (FTP) Client
- Electronic File Transfer (EFT) Account
  - Connect to account once a month
- Client Services
  - Grants access to Test and Quality Assurance (QA) environments

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IBHIS CLIENT SERVICE CERTIFICATION

Abel Rosales

IBHIS Client Services Certification

- Client Services certification is comprised of:
  - Successful completion of Scenarios 1 – 4
  - Successful completion of Scenarios 5 – 14; completing only those that are applicable to how your organization conducts business with DMH
  - Technical Validation
  - Content Validation

IBHIS Client Services Certification Cont'd

- Existing Scripts
  - New Operations
    - GetClientFinEligibility
    - GetClientDiagnosis
    - Ability to create a 24Hr client admission

IBHIS Client Services Certification Cont'd

- Future Scripts
  - Changes to future scripts
    - New Operations
      - CreateClientGuarantorPlanDetails
      - UpdateClientGuarantorPlanDetails
      - GetClientGuarantorPlanDetails
      - GetClientFinEligibility
      - GetClientDiagnosis
      - GetClientDiagnosisHistory
  - Script Cutover

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IBHIS Client Services Certification Cont'd

- Statistics as of October 2014:
  - Total - 123
    - Live - 4
    - Client Services Certified - 70
    - In Progress - 15
    - Not submitted - 34

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IBHIS EDI CLAIMS CERTIFICATION

Thelma Gonzalez

IBHIS EDI Claims Certification

- EDI Certification is comprised of:
  - Submission of 837P/837I
  - Submitting a test claim file for structural validation
  - Completion of 3 claim cycles
  - Key Points:
    - Structural validation file naming convention

      (LE initials_Duns#_Structural Validation_001_Date.txt)
    - Successful completion of structural validation is receiving a positive TA1

IBHIS EDI Claims Certification Cont'd

- Statistics as of October 2014:
  - Total - 123
    - Live on IBHIS- 4
    - IBHIS Claims Certified - 40
    - Claims Certification in Progress - 27
    - Not Started - 52

INTEGRATION SUPPORT

Sylvia Liu

Integration Support

- Trading Partner Agreement (TPA)
- Digital Certificate
- Connectivity Testing
  - General Questions e-mail TPA@dmh.lacounty.gov
  - To report issues call the DMH helpdesk @

(213) 351-1335.

Integration Support Cont'd

- Client Services
  - General questions and to report issues e-mail IBHISWSS@dmh.lacounty.gov
- IBHIS EDI Claims
  - General questions and report issues e-mail IBHISEDISupport@dmh.lacounty.gov

Integration Support Cont'd

- DMH Self Service Support Application
  - Project has been initiated.
  - Application will be public facing.
  - Will offer Trading Partners a portal to enter helpdesk tickets.

TRADING PARTNER INTEGRATION

Juan Fermin

Overview

- Integration Change Management
- Client Services Roadmap
- Client Services Release Timeline
- Recommendations for Trading Partners
- Trading Partner Interactive Feedback

Integration Change Management

- Environments
  - Test (Release Candidate)
  - Quality Assurance (QA)
  - Production
- What you can expect.
  - Release candidates will be available for trading partner/vendor integration development and testing
  - Supporting documentation will be published at time of release to our test environment
  - Documentation consists of Release Notes, Certification Scripts, Companion Guide, FAQ, and Dictionaries.

Integration Change Management Cont'd

- What you can expect. Cont'd
  - Cutover period to allow for the needed analysis, development, and testing
  - Client Service Certification will be suspended while QA and Production environments are on different versions of Client Services.

Client Services Roadmap

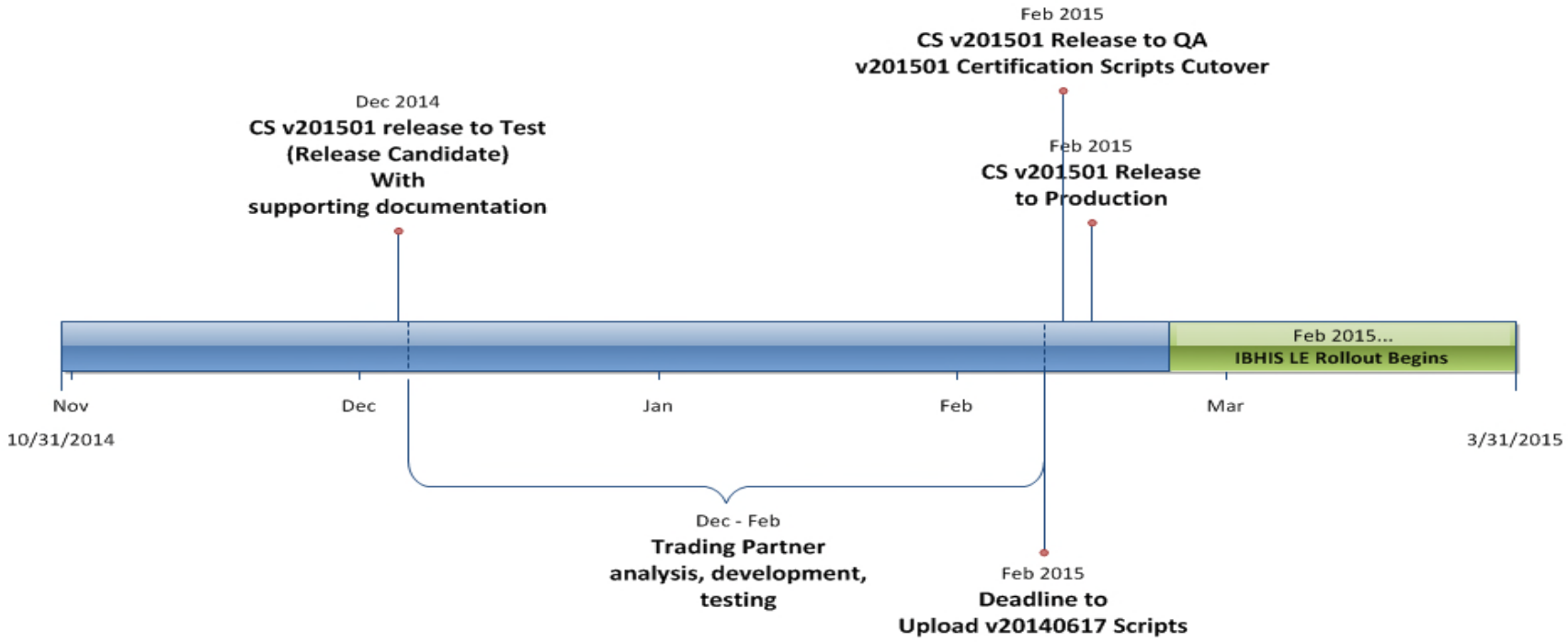
- Current Release
  - v20140617
  - Interim release for retrieving Financial Eligibility & Diagnosis
  - Interim release for 24 Hour Admissions
- Upcoming Releases
  - v201501
    - Enhanced Financial Eligibility operations
      - CreateClientGuarantorPlanDetails
      - UpdateClientGuarantorPlanDetails
      - GetClientGuarantorPlanDetails
      - GetClientFinEligibility

Client Services Roadmap Cont'd

- Upcoming Releases Cont'd
  - v201501
    - Enhanced 24 Hr Admission functionality
    - Modifications to Update operations
    - Release Candidate to be published Dec. 2014
  - ICD-10 release information to come in the 1st quarter of 2015

Client Services Release Timeline

- Proposed Timeline for the v201501 Release



Recommendations for Trading Partners

- Request access to the Test environment
- Familiarize yourself with the supporting documentation
- Work with your EHR vendor to make the modifications necessary to meet the cutover for the upcoming release.
- Understand your organizations workflow and how DMH services fit into that process

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Trading Partner Interactive Feedback

- Integration User Group
- Focus on Integration implementation
- Vendor and Trading Partner participation
- More information to be provided in coming weeks

SUPPORTING DOCUMENTATION

Supporting Documentation

- Client Services:
  - **Companion Guide**
    http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Guides.htm
  - **WSDL**
    https://b2btst.dmh.lacounty.gov/ClientService/svc.wsdl
    https://b2bqa.dmh.lacounty.gov/ClientService/svc.wsdl
    https://b2b.dmh.lacounty.gov/ClientService/svc.wsdl
  - **Dictionary Values**
    http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Technical_Specifications.htm
  - **Release Notes**
    http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Technical_Specifications.htm
  - **Certification Instructions & Scenarios**
    http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Certification.htm

Spaces in addresses are underscores "_"

Supporting Documentation Cont'd

- Trading Partner Agreement Process
  - **TPA Request Application Access Form:**
    http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Forms.htm
  - **TPA Packet and User Manual:**
    http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Certification.htm

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Supporting Documentation Cont'd

- Digital Certificate Management
  - **Initial Installation Guide**
  - **Back up and Configuration Guide**

    http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Guides.htm

- Electronic Data Interchange (EDI):
  - **IBHIS Secure File Exchange Instructions**

    http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Guides.htm

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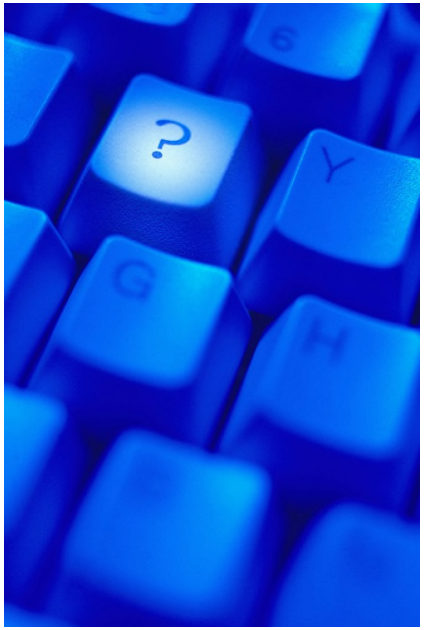
QUESTIONS



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IBHIS CLAIMS CERTIFICATION PROCESS

Sandra Rodriguez

CPTT Meeting
November 6, 2014

Presentation Objectives

- Review IBHIS Claims Certification Process
- Legal Entity and Vendor Roles
- Testing Support and Production Support
- Contact for Questions
- Questions

IBHIS Claims Certification Process

- EDI Claims testing is comprised of 3 distinct cycles
- Claim Cycle 1 includes the following claim scenarios, if applicable:

Medi-Cal	Day Treatment
Katie A	Cal-WORKS
Indigent	Residential
Medi-Medi	Inpatient
OHC-Medi-Cal	COS – except COS only providers

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IBHIS Claims Certification Process

- Claim Cycle 2 includes the following scenarios:
  - One (1) Replacement of a previously submitted test claim with a 76 modifier
  - One (1) Replacement of a previously submitted test claim with a 59 modifier
  - The replacement claim with the 59 modifier cannot be a replacement of the same claim submitted with the 76 modifier

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IBHIS Claims Certification Process

- Duplicate Override Code 76 vs 59

  76 – Repeat Procedure by Same Provider
  - Provided the same exact service
  - Same client
  - Same DOS
  - Same amount of time
  - Same Rendering Provider

  59 – Distinct Procedural Service
  - Provided the same type of service, but different procedure
  - Same client
  - Same DOS
  - Same amount of time
  - Same Rendering Provider

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IBHIS Claims Certification Process

- Claim Cycle 3 includes:
  - One (1) Void claim of a previously submitted test claim only

IBHIS Claims Certification Process

- You must complete Claim Cycle 1 before moving to Claim Cycle 2
- You must complete Claim Cycle 2 before moving to Claim Cycle 3
- DMH will notify the provider when each cycle is complete via email for them to move forward to the next cycle

Legal Entity and Vendor Roles

- During claims testing DMH will communicate directly with the LE provider
- LE provider should understand the testing process and know what is being submitted for testing
- LE provider should submit their claim files and verify receipt of return files (TA1; 999; 277CA; 835)

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Legal Entity and Vendor Roles

- Your EHR vendor should inform you regarding what you should be looking for in each of these return files (TA1; 999; 277CA; 835)

Return File	Description
TA1	File Acknowledgement
999	Claims Functional Acknowledgement
277CA	Claims Acknowledgement
835	Remittance Advice

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Testing Support and Production Support

- CIOB Revenue Systems provides direct support to LEs for “test” claims only
- After IBHIS Go-Live issues regarding “production” claims submitted to DMH will be addressed by Revenue Management Division (RMD)
- In the event RMD identifies technical issues with “production” claims, RMD will work with CIOB Revenue Systems

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QUESTIONS

Questions regarding EDI claims testing may be sent to DMH at IBHISEDISupport@dmh.lacounty.gov

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PROVIDER CONNECT

Jim Spallino

CPTT Workgroup Meeting
November 6, 2014

WHAT IS PROVIDER CONNECT?

- ProviderConnect is a web-based interface to IBHIS.
- Providers will request authorizations for Day Treatment and for Concurrent Mental Health services.
- ProviderConnect replaces the current Day Treatment system after IBHIS is fully implemented.

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CLAIMS TESTING

- To satisfy the Day Treatment claiming test scenario, each relevant provider will request an authorization (m-auth) in ProviderConnect.
- When preparing for claims testing, email jspallino@dmh.lacounty.gov.
  - Schedule a brief overview of ProviderConnect.
  - Provide access to the ProviderConnect test environment.

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CHECKLIST for "GO-LIVE"

- Request access to ProviderConnect "Live"
  - Each user will complete a set of PDF fillable forms located on the web site: http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Forms.htm
  - After scanning the completed forms, email them to: DMHPSO@dmh.lacounty.gov
- Review online training video: http://file.lacounty.gov/dmh/cms1_214742.wmv
- Upon go-live, login to ProviderConnect and verify active authorizations.

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QUESTIONS?

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REPORTS AND EXTRACTS

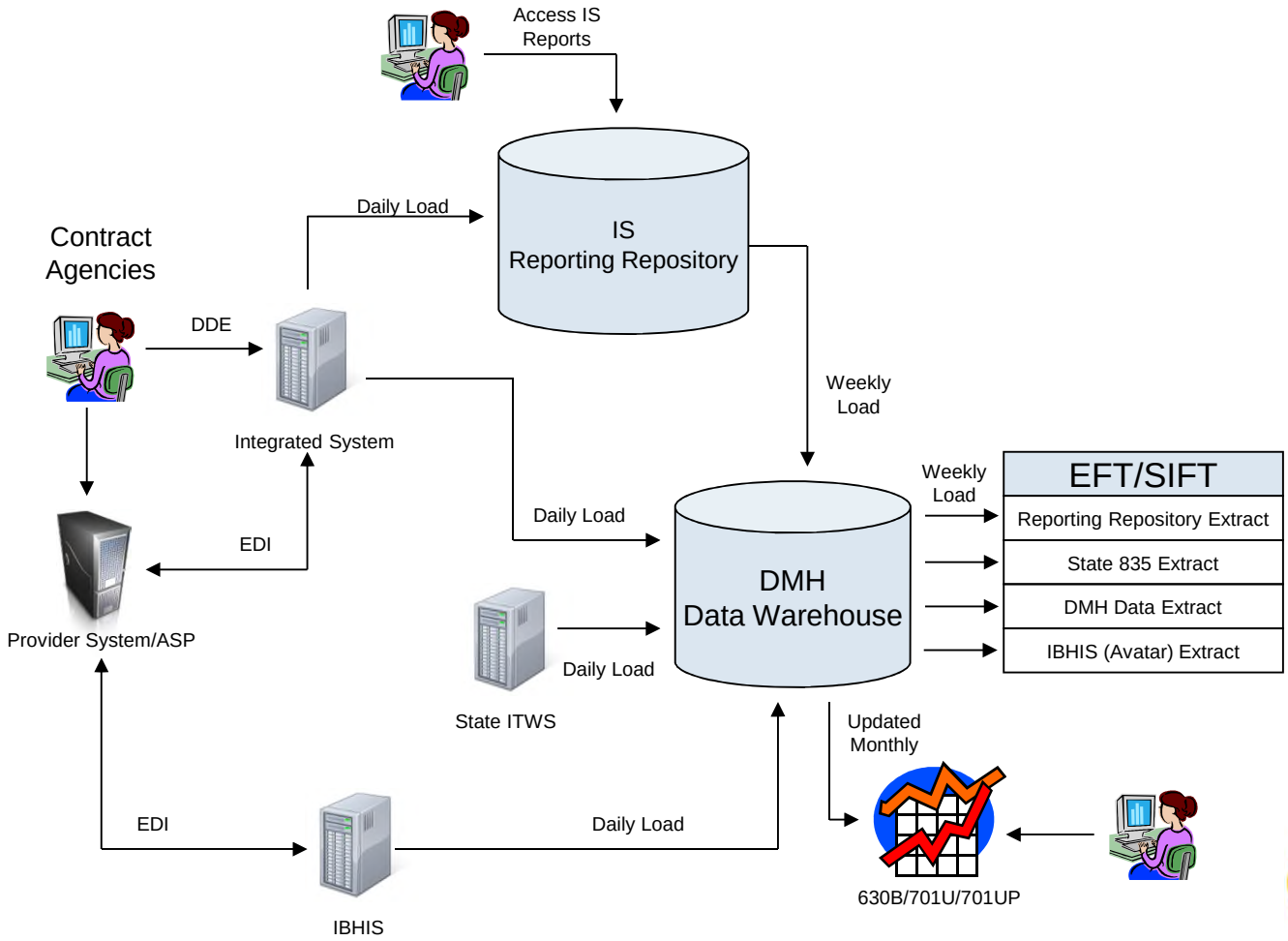
Presley Becerra

Contract Provider Readiness Meeting
November 6, 2014

REPORTS and EXTRACTS

- Overview of data/reports used by Contractors/Network Providers in EDI Production
  - SIFT/EFT
  - FinClaimList
  - 630B/701U/701UP Reports

REPORTS and EXTRACTS – Legal Entities



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Reports Committee Website

- http://lacdmh.lacounty.gov/ISReport/
  - Click on the Documentation Link (http://lacdmh.lacounty.gov/ISReport/Documentation.html)
  - On the Documentation website, there two links regarding IBHIS data extracts:
    - Converted Data (from IS to IBHIS) Extract Information
      - This describes at a high level the individual tables in the Avatar Data Extract database and a list of how work with the data provided
    - Legal Entity Extract Avatar Data Dictionary
      - This provides the description and layout of the Avatar Data Extract database

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IBHIS READINESS WORKFLOW

Racheal Burgess

CPTT Meeting
November 6, 2014

Presentation Objectives

- Provide a visual representation of the flow of key Legal Entity Contractor and DMH tasks to complete the IBHIS Readiness process

Key Features of the Workflow

- The workflow begins at the upper left of the diagram
- Tasks are color-coded boxes placed on a directional line and labeled with task identifiers
- From the upper left, the flow moves from Left to Right, then down and Right to Left in a zigzag pattern until the “End” point at the lower Right, fourth level

Key Features of the Workflow

- The LEGEND at the lower right indicates that:

Green Task Boxes represent tasks that must be completed by the Legal Entity Contractor

Orange Task Boxes represent tasks that must be completed by DMH

Blue Task Boxes represent tasks that are joint efforts of the Legal Entity Contractor and DMH

Key Features of the Workflow

- The LEGEND at the lower right also indicates that:
  - Task boxes joined horizontally (left to right) represent activities that, within the group of task boxes, may occur in any order
  - Task boxes joined vertically occur in a specific sequence from top (first) to bottom (last)
- ProviderConnect tasks are only for those who provide Day Treatment and/or Concurrent Mental Health Services

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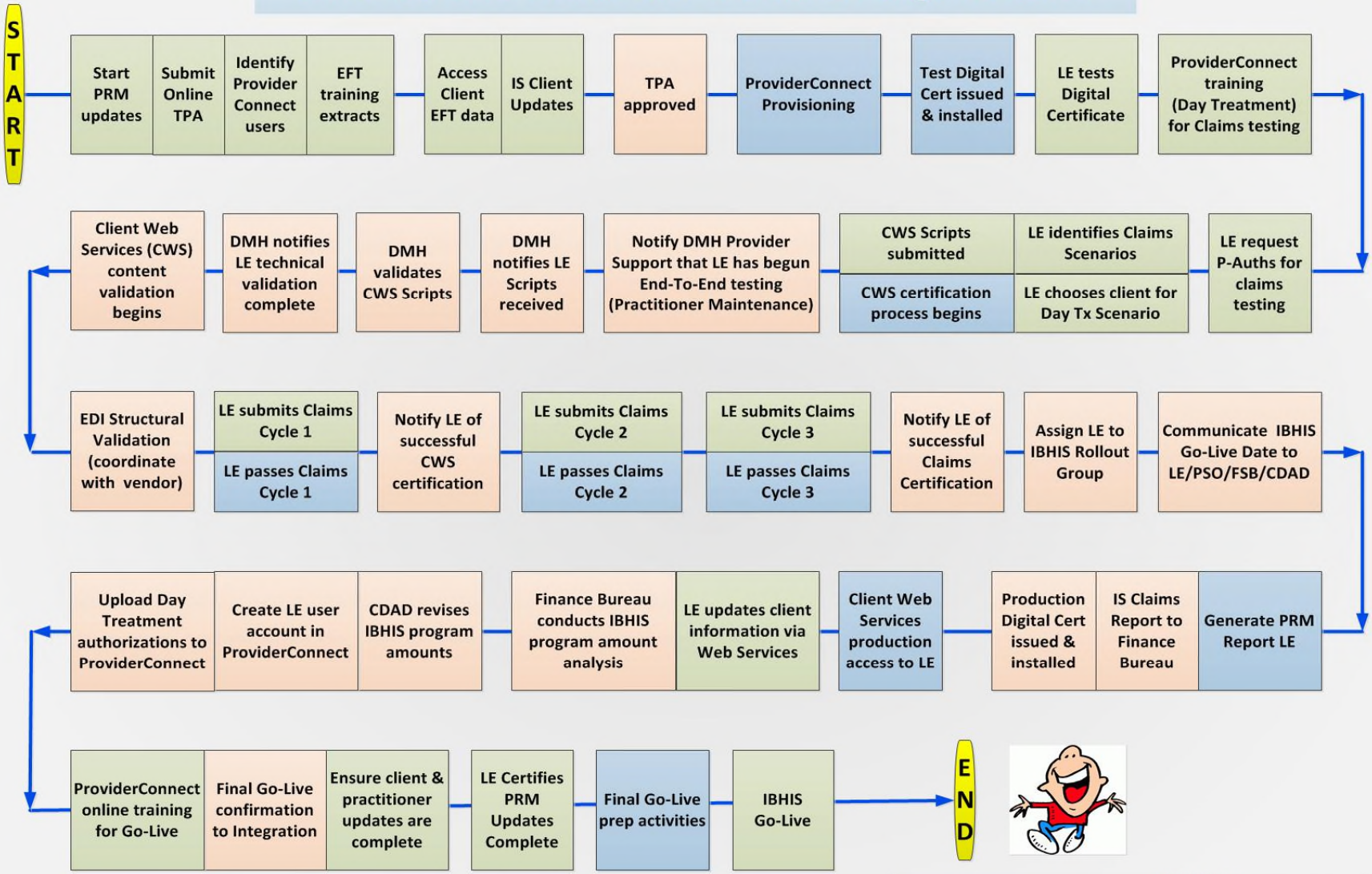
IBHIS Go-Live Readiness Workflow Legal Entities



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QUESTIONS

Questions regarding e-signature may be sent to DMH at ecertify@dmh.lacounty.gov or call 213.251.6675.

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ELECTRONIC SIGNATURE

Gordon Bunch

CPTT Meeting
November 6, 2014

Presentation Objectives

- Review e-signature requirement
- Legal Entity (LE) e-signature certification (Attachment B)
- Legal Entity e-signature Agreement (Attachment C)
- Action Plan
- Questions

Electronic Signature

- In early 2010 State issued standards for e-signature and required all Counties to certify compliance with these standards (see handout Attachment A)
- Counties are to expect Contractor compliance with these standards and promote compliance

Electronic Signature

- Action 1: LE must submit to DMH a signed Legal Entity Electronic Signature Certification
- Template handout (Attachment B)
  - Certification must be on agency letterhead
  - Narrative must conform to the template provided
  - Signed by Legal Entity Director
  - Send copy to ecertify@dmh.lacounty.gov
  - One time only – no renewal required

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Electronic Signature

- Action 2: LE must require that all end users of electronic signature sign an Electronic Signature Agreement
- Template Handout (Attachment C)
  - Use as is or revise to fit your needs, but must capture the spirit of the template
  - Maintain on file at LE (digital or hardcopy)
  - **Do not send to DMH**
  - Agreements expire, renewal required annually
  - Make available for audit/review

Action Plan

- When does this requirement apply to the LE and LE employees/contractors?
  - If you are currently using e-signature technology and these actions have not been taken, take required actions immediately
    - Due to expiration of the electronic signature agreement that end users sign, ensure that you keep updated copies on file and available for audit/review
  - If your agency has not adopted e-signature, take both actions upon implementation of e-signature at your agency.

Handouts

- Attachment A: DMH Letter No: 08-10 (information only)
- Attachment B: Legal Entity Electronic Signature Certification (submit to DMH upon LE director signature)
- Attachment C: Legal Entity Electronic Signature Agreement (all users of e-signature – keep on file – do not submit to DMH)

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QUESTIONS

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