

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.)**

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

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

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



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 ending Oct./Nov. 2015

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



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 not previously submitted to the IS
- 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

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.



QUESTIONS



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

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



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

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

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

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

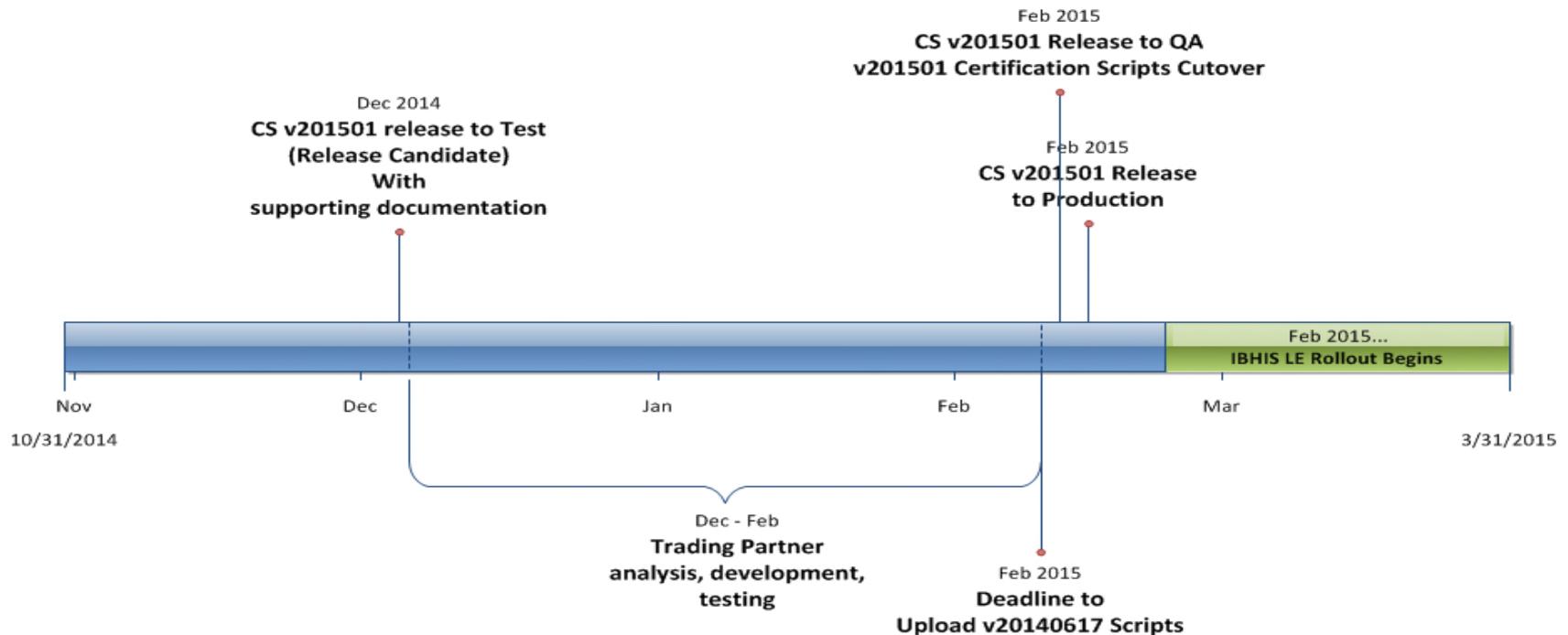
- **Current Release**
 - v20140617
 - Interim release for retrieving Financial Eligibility & Diagnosis
 - Interim release for 24 Hour Admissions
- **Upcoming Releases**
 - v201501
 - Enhanced Financial Eligibility operations
 - CreateClientGuarantorPlanDetails
 - UpdateClientGuarantorPlanDetails
 - GetClientGuarantorPlanDetails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



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

Spaces in addresses are underscores “_”



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

Spaces in addresses are underscores “ _ ”



QUESTIONS



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



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

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



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)

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

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

QUESTIONS



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

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.



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.

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.



QUESTIONS?

REPORTS AND EXTRACTS

Presley Becerra

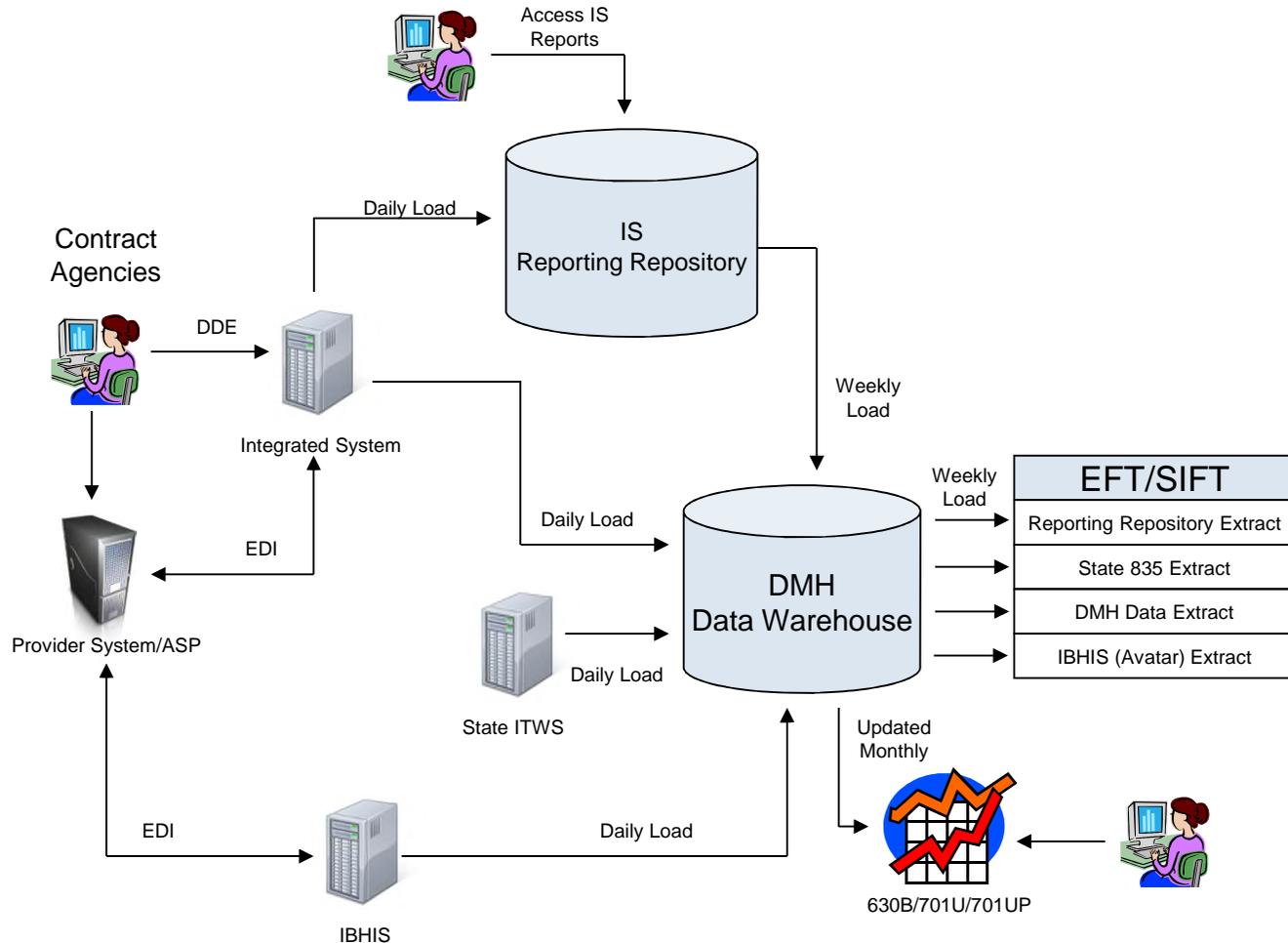
**Contract Provider Readiness Meeting
November 6, 2014**



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



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

IBHIS READINESS WORKFLOW

Racheal Burgess

CPTT Meeting
November 6, 2014

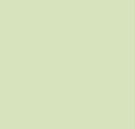
Presentation Objectives

- 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

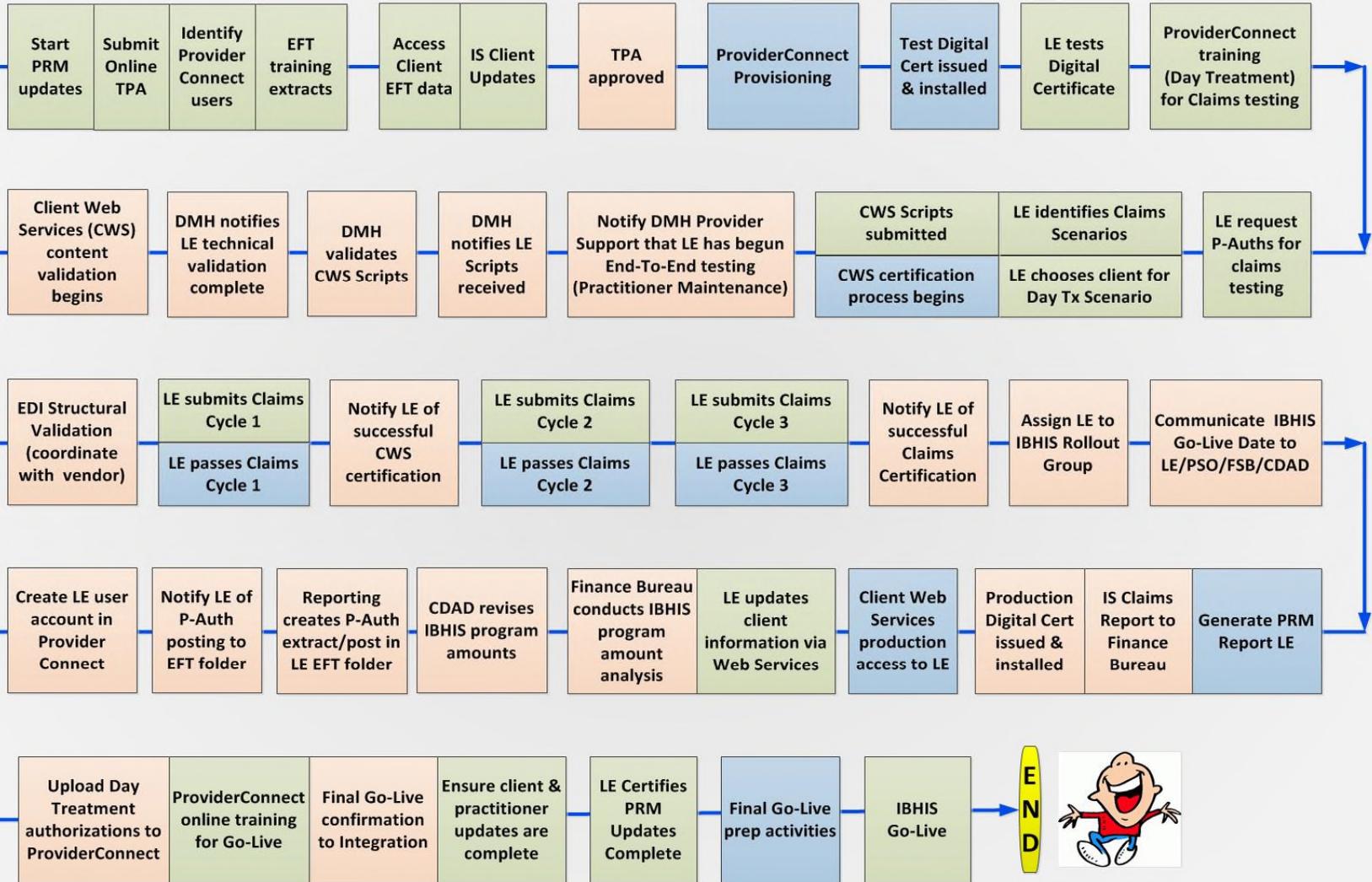
Key Features of the Workflow

- 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



IBHIS Go-Live Readiness Workflow Legal Entities

START



END

LEGEND

LE TASK	Horizontal Joins are not sequential Vertical Joins are sequential
DMH TASK	
LE/DMH TASK	

QUESTIONS



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

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

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)

QUESTIONS



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