



Meeting Agenda IBHIS Readiness Group 5

March 3, 2014
10:00 a.m. – 12:00 p.m.

- ✓ **Welcome (2 min.) - Gordon Bunch**
- ✓ **Readiness Schedule (3 min.) - Gordon Bunch**
- ✓ **Practitioner Maintenance (15 min.) – Aswad Hood**
- ✓ **Integration (35 min.) – Ruchi Sukhija**
 - ✓ **Trading Partner Agreement (TPA) Process**
 - ✓ **Technical Guide – Client Web Services**
 - ✓ **COS via 837P**
- ✓ **Provider Connect (10 min.) – Giri Patterikalam**
- ✓ **Reports and Extracts - (10 min.) – Presley Becerra**
- ✓ **Readiness Tasks (5 min.) - Gordon Bunch**
- ✓ **Questions/Answers (40 min.)**

“To Enrich Lives Through Effective And Caring Service”

WELCOME

Gordon Bunch

**Contract Provider Readiness Meeting
March 3, 2014**



WELCOME

Legal Entity Providers Readiness Group 5

ASC Treatment Group

Asian American Drug Abuse Program

Bayfront Youth and Family Service

BRIDGES

CA Institute of Health & Social Services

Children's Institute

Clontarf Manor

Counseling for Kids

Department of Health Services

Didi Hirsch Psychiatric Service

Eggleston Youth Center

El Centro de Amistad

El Centro del Pueblo

Ettie Lee Homes



WELCOME

Legal Entity Providers

Readiness Group 5

Families First

Gateways Hospital & Mental Health

HealthView

Hillview mental Health Center

Homes for Life

Junior Blind of America

JWCH Institute

Kedren Community Health Center

Los Angeles Child Guidance Clinic

Ocean Park Community Center

Optimist Boys Home and Ranch

Pasadena Unified School District



WELCOME

Legal Entity Providers

Readiness Group 5

San Gabriel Children's Center

SHIELDS for Families

So. Cal. Alcohol and Drug Programs

St. Joseph Center

Star View Adolescent Center

Step Up on Second Street

Tarzana Treatment Center

The Help Group Child & Family Center

The LA Free Clinic (Saban)

The LA Gay and Lesbian Services Center

The Village Family Services

Topanga Roscoe Corporation



WELCOME

Legal Entity Providers

Readiness Group 5

UCLA Regents

Watts Labor Community Action Committee

Maryvale



IBHIS READINESS SCHEDULE READINESS GROUP FIVE

Gordon Bunch

Contractor Readiness Meeting
March 3, 2014



IBHIS ROLLOUTS: LEGAL ENTITY (LE) CONTRACT PROVIDERS

- IBHIS Pilot 1-A January 27, 2014
 - Directly Operated Sites and Programs only
- Pilot 1-B February - March, 2014
 - Eleven Legal Entity volunteers
 - Three FFS2 Network Providers
- All Other Legal Entities July 1, 2014
- All Other FFS2 Network Providers September 3, 2014



READINESS GROUP 5

- Provisioning Start: April 3, 2014
- Provisioning End: April 30, 2014
- Testing Start: May 2, 2014
- Testing End: June 30, 2014
- Go-Live to IBHIS: July 1, 2014

PRACTITIONER MAINTENANCE

Practitioner Registration and Maintenance Application

ASWAD HOOD

Contract Provider's Readiness Meeting



Practitioner Registration and Maintenance Application

How will practitioner maintenance be handled when contract providers go-live on Avatar?

- The DMH Practitioner Registration Maintenance Application (PRM) became available to contract providers in Pilot 1 B on December 13, 2013.
- The application will allow contract providers to:
 - Add new practitioners to your LE
 - Update existing practitioner data

Practitioner Registration and Maintenance Application

- Prior to each Readiness Group DMH Provider Support Office (PSO) will make the PRM available to the legal entities in that Readiness Group.
- One of the letters in your package of handouts announces the PRM Rollout and provides the link to the application's website. A copy of the Application Access Form is also in your package.



Practitioner Registration and Maintenance Application

UPDATING PRACTITIONERS

Some of the features of the new application include:

- Ability to add new practitioners to your legal entity.
- Ability to associate a practitioner to your legal entity who is currently assigned to another legal entity.
- A procedure or routine that matches specific data fields from PRM with NPPES data such as the practitioner's last and first name, NPI, and taxonomy.

Practitioner Registration and Maintenance Application

UPDATING PRACTITIONERS

- Once your legal entity begins using the PRM to add and update practitioners, LE provider staff *must* continue to make those same additions and updates in the current **Automated Rendering Provider Application**. There is no automated syncing between the two systems.
- This will ensure that both the IS and IBHIS are current. After full and complete cutover to IBHIS, legal entities can discontinue IS updates.



Practitioner Registration and Maintenance Application

UPDATING PRACTITIONERS

- The information in the PRM was last updated in June 30, 2013. Depending on staff turnover within a legal entity there maybe a number of additions and updates to enter into PRM.
- It is recommended that legal entities prepare for this rollout by creating a log of new practitioners and updates that have been entered in the IS since June 30, 2013.



Practitioner Registration and Maintenance Application

UPDATING PRACTITIONERS

- The best source for creating the practitioner log for your legal entity is printed copies from the Automated Rendering Provider Application since June 2013.
- The IS 280 Assigned Staff Register Report is also a good source.

Practitioner Registration and Maintenance Application

USER ACCESS

- To assign staff access to the PRM application you must complete the Application Access Form (included in your package of handouts) and have it signed by the Authorized Signer for your legal entity. Staff who previously had PRM access do not need to complete the Application Access Form.
- Check Oath of Confidentiality Form on file at facility.
- To facilitate the process, we are accepting scanned copies of the AA Form for PRM Access. Details are included in the letter.

Practitioner Registration and Maintenance Application

USER ACCESS

- After PSO staff processes the AA Form, users will receive an email confirmation that provides their user name and password.
- Current staff with IS access and prior PRM users will use their C number for PRM as their user name, but will need to request a new password.
- There is no requirement to have a Secure ID/RSA Token to access the PRM.

Practitioner Registration and Maintenance Application

EDI_Basics.htm - Windows Internet Explorer
http://lacdmh.lacounty.gov/hipaa/IBHIS_EDIPilot1.htm

File Edit View Favorites Tools Help
Favorites Suggested Sites Web Slice Gallery
EDI_Basics.htm

Integrated System
To Enrich Lives Through Effective and Caring Service

IS HOME DIRECTLY OPERATED CLINICS OUTPATIENT FEE-FOR-SERVICE CONTRACT PROVIDERS

Working in the IS ←

IBHIS Pilot I

Click on the Links below to view the materials.....

- [IBHIS Pilot 1 - Practitioner Registration & Maintenance \(PRM\) Application](#)
- [IBHIS Pilot 1 - Practitioner Registration & Maintenance \(PRM\) User Manual](#)
- [IBHIS Pilot 1 - Readiness Meeting Presentations - September 25, 2013](#)
- [IBHIS Pilot 1 - Testing Checklist - September 25, 2013](#)
- [IBHIS Pilot I - Kickoff Meeting - March 13, 2013 - Presentation](#)
- [IBHIS Pilot I - Kickoff Meeting - Claims Processing Handout](#)
- [IBHIS Pilot I - Kickoff Meeting - New IBHIS Webpage Handout](#)

[IBHIS Pilot I](#)
[IBHIS EDI Basics](#)
[IBHIS EDI Certification](#)
[IBHIS EDI Forms and System Access Forms](#)
[IBHIS EDI Guides](#)
[IBHIS EDI Support](#)
[IBHIS EDI Training](#)
[IBHIS Technical Specifications](#)
[IBHIS Readiness](#)
[IBHIS EDI News/Alerts](#)
[IBHIS Calendar/Timelines](#)
[IBHIS FAQ's](#)
[IBHIS Links](#)

Practitioner Registration and Maintenance Application

- ▶ The links to the PRM and the User Manual can be found at:

http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Pilot1.htm

- ▶ Questions about the PRM Application and User Access should be directed to the Help Desk at (213) 351-1335.



CONTRACT PROVIDERS INTEGRATION

Ruchi Sukhija

**Contract Provider Readiness Meeting
March 3, 2014**



Overview

- Trading Partner Agreement (TPA) process
- Testing Phases & Timelines
- Contract Provider Testing – Checklist
- Certification Criteria
- Certification Process
- Pilot 1b Go-Live Update
- Q/A

IBHIS TPA PROCESS

- With the “**electronic**” process, there will be no need for submitting the paper form(s)
- By clicking a link, you will be able to create, save, update and submit your TPA request
- Upload your signed Trading Partner Agreement and view at any time
- Interactive way of downloading digital keys
- View the status of your request real-time



IBHIS TPA PROCESS

- How and Where?
 - Use **IS credentials** to login
 - If this person does not have an IS Login, and is **ONLY** planning to access the TPA application (NOT the IS), will need to submit a ***TPA Application Access Form***.
 - Located under **IBHIS EDI Forms and System Access Forms** on the website
 - Email form to: TPA@dmh.lacounty.gov



IBHIS TPA PROCESS

- New links on the IBHIS website
 - Trading Partner Application (TPA) link

<https://extra.dmh.lacounty.gov/TPARequest/Security/SignIn.aspx>

- User Manuals

http://lacdmh.lacounty.gov/hipaa/documents/DMH_TradingPartnerManual_v.1.4.pdf

- Two Part Webinar

http://lacdmh.lacounty.gov/hipaa/documents/IBHIS_TPA_Part1.wmv

http://lacdmh.lacounty.gov/hipaa/documents/IBHIS_TPA_Part2.wmv

Start Date Readiness Group 5: **4/3/14**



TESTING PHASES & TIMELINES

- Digital Key Testing
- COS Testing
- Web Services Testing
- EDI Claims Testing



DIGITAL KEY TESTING

- After submitting the TPA request, you will be assigned a Test Digital Key. The instructions to download the Digital Key is covered in the TPA User Manual.
- Timeframe (Group 5): **4/3/14 – 4/30/14**

DIGITAL KEY TESTING

- The process of validating the Digital Key is as follows:
 - Using the assigned Test Digital Key, connect to “new” IBHIS File-drop location.
 - Using the Test Digital Key, connect to LACDMH Client Web Services

DIGITAL KEY TESTING

- Links on the IBHIS website

- IBHIS Secure File Exchange location

http://lacdmh.lacounty.gov/hipaa/documents/IBHIS_Secure_File_Exchange_Instructions_v1_1.pdf

- Web Services Technical Design Document

http://lacdmh.lacounty.gov/hipaa/documents/LACDMH_ClientWebServices_TechnicalDesignDocument_v_2_0.pdf



WEB SERVICES TESTING

- DMH has released the Companion Guide and Technical Design Document for Web Services
- Contract Providers and their respective EHR vendors will make appropriate changes to their systems.
- **Content Testing Start Date (Group 5):**
5/2/14

EDI CLAIMS TESTING

- IBHIS 837 5010 Companion Guide released
- Contract Providers and their respective EHR vendors will make appropriate changes to their systems.
- **Content Testing Start Date (Group 5):**
5/2/14

COS TESTING

- DMH released the IBHIS 837 5010 Companion Guide (for COS data elements)
- COS Contract Providers and their respective EHR vendors will make appropriate changes to their systems.
- **Content Testing Start Date (Group 5):**
5/2/14

CONTRACT PROVIDER TESTING-CHECKLIST

- To help keep track of various activities and timelines, a checklist has been created for your reference – including information on PRM and SIFT/EFT extracts.
- Please see the handout

CERTIFICATION CRITERIA – WEB SERVICE (BUSINESS FUNCTIONS)

- Search Client
- Create and Admit New Client – (~ 5 Test Clients)
(including Financial Eligibility)

EDI-Ready Status

- Admit Existing Client
- Update Client
- Discharge Client
- Get Client Information
- Get Client Treatment History



CERTIFICATION CRITERIA – EDI & COS

- Indigent Claims:
 - Financial Eligibility shows LA County only
- Medi-Cal Claims:
 - Financial Eligibility shows Medi-Cal and LA County
- Medi-Cal Katie A Claims:
 - Financial Eligibility shows Katie A Medi-Cal and LA County
- Medi/Medi or OHC/Medi Claims:
 - Financial Eligibility shows Medicare or OHC, Medi-Cal and LA County
- Claims with COS data elements

CERTIFICATION PROCESS

- The Certification documents are available under **IBHIS EDI Certification** on the website:

[http://lacdmh.lacounty.gov/hipaa/IBHIS
EDI_Certification.htm](http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_Certification.htm)



CERTIFICATION PROCESS

- Readiness group agencies will complete the “**Client Web Services Certification**” document and upload it to the “**Certification**” folder of IBHIS File-drop location.
- Please review “**IBHIS Secure File Exchange Instructions**” for more details.

http://lacdmh.lacounty.gov/hipaa/documents/IBHIS_Secure_File_Exchange_Instructions_v1_1.pdf



CERTIFICATION PROCESS

- Readiness group agencies will submit EDI Claim files based on the testing scenarios listed in “**CIOB Claims Certification Basic Testing**” document posted under IBHIS EDI Certification on the IBHIS website.

<http://lacdmh.lacounty.gov/hipaa/documents/CIOB%20Claims%20Certification%20Basic%20Testing%2020140131.pdf>



CERTIFICATION PROCESS

- Once LACDMH validates the data (Client Web Services Certification document and EDI claims), agencies will be flagged as “Production Ready” and will receive their Production Digital Key.



Pilot 1b Go-Live Update

- Pilot 1b was scheduled for full Go-Live on February 20, 2014 with:
 - 11 Legal Entities
 - 3 Fee For Service Network Providers
 - 3 EHR Vendors (Exym, Clinivate, Welligent)
- Criteria For a 2/20/14 Full Go-Live included:
 - Web Services
 - Claims Processing (individual and COS services)



Pilot 1b Go-Live Update

- On February 18, DMH made a “No-Go” decision to:
 - Delay Go-Live for a brief period
 - Allow Go-Live on Web Services in advance of Go-Live for claiming
 - Allow Pilot 1b participants to continue submission of claims to the IS until the next payment close date 3/7/14
 - Establish a new target for Web Services and Claims Go-Lives in March 2014
 - Achieve Web Services Go-Live in February 2014 for Foothill and Five Acres



Pilot 1b Go-Live Update

- Factors contributing to that “No-Go” decision included:
 - Unresolved issues surrounding claiming
 - One of three vendors had completed Web Services testing before 2/20 Go-Live
 - Two agencies were nearing completion of Web Services end-to-end testing but neither were expected to meet claims certification by 2/20

Pilot 1b Go-Live Update

- Client Web Services Go-Live
 - **Foothill** (Welligent) on 02/24/14
 - **5 Acres** (Welligent) on 02/28/14
- Claim Certified
 - **Foothill** (Welligent) on 02/26/14

Lessons Learned

- Certification can be an iterative and time consuming process
- Sufficient knowledgeable and skilled resources can help expedite all phases of the readiness effort
- Close communication between DMH, DMH's EHR Vendor, Legal Entity and Legal Entity Vendors is essential

Pilot 1b Go-Live - Recognition

- Chris Howard (Foothill)
- Michael Strawn (5 Acres)

QUESTIONS



PROVIDER CONNECT

Giri Patterikalam

Contract Provider Readiness Meeting
March 3, 2014



LEGAL ENTITY USERS

- At IBHIS go live, Day Treatment providers will use Provider Connect to request authorizations for Day Treatment services.
- Day Treatment providers will also use Provider Connect to request authorizations for Concurrent Mental Health Services.
- The current Day Treatment System will not be used after full IBHIS implementation.

ACCESS

- ProviderConnect is an external interface to the IBHIS system that provides certain functionality to the provider community.
- It has a web interface which can be accessed from the Internet via most common web browsers.
- DMH will issue login credentials after the provider has attended training.

LOG IN SCREEN

ProviderConnect

A Continuum of Interactive Community Healthcare

Secure Login

Please enter your username and password below.

Username:	<input type="text"/>
Password:	<input type="password"/>

LOGIN

When entering your password, please ensure that your Caps Lock key is not depressed.



MAIN SCREEN

You are logged in as:	
Your last login was:	

Main Menu - Provider		
Lookup Client	Reports	Add New Client/Client Search
Change Password	Documentation	News
Logout / Exit		

About ProviderConnect v2.188.4



SEARCH CLIENT

- Enter criteria to search for the client

Search Criteria	
Member ID:	<input type="text"/>
SSN:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Date of Birth:	<input type="text"/>

- Search results are displayed

Search Results				
Client ID	Last Name	First Name	Date of Birth	Agency
211	PROVIDERCONNECT	TESTONE	1/21/1974	Your Agency Name
333	HARRIS	Another	6/27/1948	Your Agency Name
444	Developer	Another	1/1/1975	Your Agency Name

VIEW AUTHORIZATION

- Select authorizations from the menu

Demographic
CSI Admission
Authorizations
Provider Admission
Provider Diagnosis
Attachments



- Current authorizations for the client will appear

Provider	Auth Number	CP Program	Status	Review Status	Request Date	Review Date	Begin Date	Expiration Date	Tx Codes	Attachments
	360		Complete	Not Reviewed	1/28/2014 1:58:55 PM	1/28/2014 1:58:55 PM	5/1/2014	7/29/2014		Edit / Add New
	338			Denied		1/9/2014 5:35:31 PM			Day Treatment Intensive, Full Day	Edit / Add New
	232		Complete	Approved	1/7/2014 5:52:09 PM	1/8/2014 4:41:12 PM	1/7/2014	4/6/2014	Day Treatment Intensive, Full Day	Edit / Add New

REQUEST AUTHORIZATION*

- Step 1: Authorization Request
 - Diagnosis
 - Funding source/benefit plan
 - Procedure codes
 - Authorization number is assigned

*In order to request an authorization, the client must have an active admission in IBHIS associated to your LE.

REQUEST AUTHORIZATION

- Step 2: Authorization Details
 - Client Care Plan
 - Service Necessity Assessment
 - Outcomes/Progress Review
 - Plan Communication
 - CAU Authorization Response
- Step 3: Attach Supporting Documents
 - Signed Client Care Plan
 - Other pertinent docs if necessary

AUTHORIZATION RESPONSE

- As LACDMH evaluates the request, this data can be viewed in the authorization request and details screens.
 - Comments/notes
 - Status (approval/denial)
 - Units and date authorized

TRAINING

- Who?
 - LE Providers performing Day Treatment and Concurrent Mental Health Services for Day Treatment Clients
- What?
 - Search for clients
 - Create and edit service authorizations
 - Check status for submitted service authorizations
 - Communicate with Central Authorizations Unit
- When?
 - Exact dates TBD
 - During readiness process (after provisioning and before final testing)

QUESTIONS?



REPORTS AND EXTRACTS

Presley Becerra

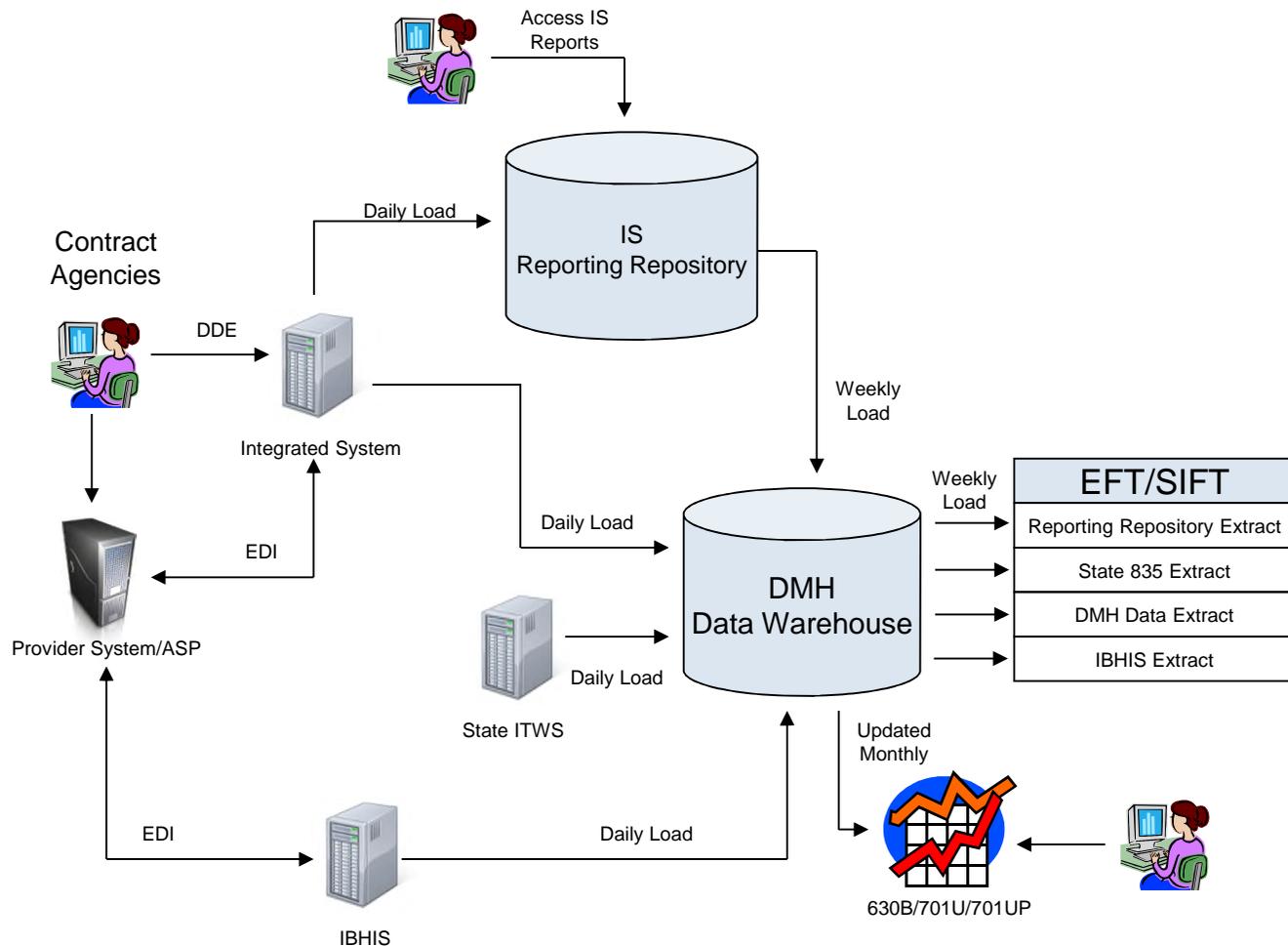
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REPORTS and EXTRACTS

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

REPORTS and EXTRACTS – Legal Entities



CONTRACTOR READINESS

Gordon Bunch

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March 3, 2014



OUTLINE

- Overview
- Readiness Areas
- Readiness Tasks
- Next Steps



WHAT DOES READINESS MEAN

- All business functions, technical processes, training, policies and procedures are completed and in place
- Contractor has successfully completed their “Readiness Tasks”

KEY READINESS AREAS

1. Practitioner setup in IBHIS
2. Trading Partner Agreement
3. Testing – Web Services, 837P for client service claims and COS service documentation

KEY READINESS AREAS

4. ProviderConnect (Provider Portal)
5. Reporting and SIFT Extracts

READINESS TASKS

- Handout



NEXT STEPS

- Identify your Readiness Team
- Review the Readiness Tasks
- Develop a readiness project schedule
- Notify your vendor of the testing timeline
- Begin readiness tasks

NEXT STEPS

- Monitor project schedule
- Contact CPTT if you have questions at:
 - CPTT@dmh.lacounty.gov
- Review the IBHIS EDI Website(s) regularly for updates
- Legal Entities
 - http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_homepage.html



QUESTIONS

