



Click agenda item below to navigate to selected presentation section.

## Meeting Agenda Readiness Group Four

February 5, 2014  
10:00 a.m. – 12:00 p.m.

- ✓ **Welcome (2 min.) - Gordon Bunch**
- ✓ **Practitioner Maintenance (15 min.) – Joyce Fantroy**
- ✓ **Integration (35 min.) – Ruchi Sukhija**
  - ✓ **Trading Partner Agreement (TPA) Process**
  - ✓ **Technical Guide – Client Web Services**
  - ✓ **COS via 837P**
- ✓ **Provider Connect Overview – (10 min.) – Giri Patterikalam**
- ✓ **ProviderConnect Training - (10 min.) – Giri Patterikalam**
- ✓ **Reports and Extracts - (10 min. ) – Presley Becerra**
- ✓ **Readiness Tasks (10 min.) - Gordon Bunch**
- ✓ **Readiness Schedule (5 min.) - Gordon Bunch**
- ✓ **Questions/Answers (20 min.)**

*“To Enrich Lives Through Effective And Caring Service”*

# WELCOME

## Gordon Bunch

**Contract Provider Readiness Meeting  
February 5, 2014**



# WELCOME

## Legal Entity Providers

### Readiness Group 4

1736 Family Crisis Center

Alma Family Services

Amanacer Community Counseling

Barbour and Floyd

Bienvenidos Children's Center

California Hispanic Commission

Center for Integrated Family & Health

Children's Bureau

City of Gardena

Dignity Health

Drew Child Development

Eldorado Community Service Center

Florence Crittenton Services

Helpline Youth Counseling



# WELCOME

## Legal Entity Providers

### Readiness Group 4

Hillsides

Inst. For Multicultural Counseling & Ed.

Jewish Family Service

Korean American Family Service

LAMP

LA Unified School District

Pacific Clinics

Pediatric and Family Medical Center

Personal Involvement Center

Phoenix Houses of LA

Prototypes

Rosemary Children's Services



# WELCOME

## Legal Entity Providers

### Readiness Group 4

Social Model Recovery Systems

South Bay Children's Health Center

St. Anne's Maternity Home

St. John's Health Center

Stirling Academy

SunBridge Harbor View Rehabilitation

The Institute for Redesign of Learning

Tobinworld

Trinity Youth Services

University Muslim Medical Association

Vista Del Mar Child & Family Services

Westside Center for Independent Living



# PRACTITIONER MAINTENANCE

## Practitioner Registration and Maintenance Application

DONNAKAY DAVIS

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.
- 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 will use their C number for PRM as their user name, but will receive a new password. Non-IS users will receive a new user name and password.
- There is no requirement to have a Secure ID/RSA Token to access the PRM.

# Practitioner Registration and Maintenance Application

- ▶ Questions about the PRM Application and User Access should be directed to the Help Desk at (310) 351-1335.

# CONTRACT PROVIDERS INTEGRATION

**Ruchi Sukhija**

**Contract Provider Readiness Meeting  
February 5, 2014**



# Overview

- Trading Partner Agreement (TPA) process
- Testing Phases & Timelines
- Contract Provider Testing – Checklist
- Certification Criteria
- Certification Process
- 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](mailto:TPA@dmh.lacounty.gov)



# IBHIS TPA PROCESS

- New links on the IBHIS website
  - Trading Partner Application (TPA) link
  - User Manuals
  - Webinars
  
- Start Date Readiness Group 4: **3/4/14**



# 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 4): **3/4/14 – 4/1/14**



# 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
  - Web Services Technical Design Document

## 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 4):**  
**4/2/14**



## 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 4):**  
**4/2/14**



## 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 4):**  
**4/2/14**



# CONTRACT PROVIDER TESTING-CHECKLIST

- To help keep track of various activities and timelines, a checklist has been created for your reference.
- 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.



# 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.



# 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 Production Digital Key.



# QUESTIONS



# PROVIDERCONNECT

## Giri Patterikalam

Contract Provider Readiness Meeting  
February 5, 2014



# LEGAL ENTITY USERS

- At IBHIS go live, Day Treatment providers will be required to use Provider Connect to request authorizations for Day Treatment services.
- The Concurrent Mental Health Services that require authorization will also use this system to request authorizations.
- The current Day Treatment System will no longer be used.



# ACCESS

- ProviderConnect is an external interface to the IBHIS system which exposes some functionality to the provider community.
- It has a web interface which can be accessed thru the internet.

# ACCESS

- In order to access the web portal, the provider will be registered to the system.
- DMH will issue login credentials, once the provider is registered into IBHIS and requires access to provider connect .



# LOG IN SCREEN

## ProviderConnect

*A Continuum of Interactive Community Healthcare*

### Secure Login

Please enter your username and password below.

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

**LOGIN**

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



# MAIN SCREEN

<b>You are logged in as:</b>	[REDACTED]
<b>Your last login was:</b>	9/23/2013 2:20:00 PM

Main Menu - Provider		
<u>L</u> ookup Client	Add New Client/Client Search	Change Password
Documentation	News	

Logout / Exit
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# CLIENT SEARCH

- The search will list the client information as follows based on the parameters provided.

Search Results				
Client ID	Last Name	First Name	Date of Birth	Agency
211	PROVIDERCONNECT	TESTONE	1/21/1974	Your Agency Name
111	TESTONE	RANDALL	1/2/1962	Your Agency Name
222	TRAINING	CLAIM	1/21/1974	Your Agency Name
333	HARRIS	Another	6/27/1948	Your Agency Name
444	Developer	Another	1/1/1975	Your Agency Name



# REQUEST AUTHORIZATION

<b>Member ID</b>
<b>1001117</b>
<b>Demographic</b>
<b>Authorizations</b>
<b>Provider Admission</b>
<b>Attachments</b>
<b>Day Treatment / MHS Authorization Details</b>
<b>Exit to Main Menu</b>

Provider	Auth Number	Origin	CP Program	Status	Review Status	Request Date	Review Date	Begin Date	Expiration Date	Tx Codes	Attachments
	360	ProviderConnect		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	MSO			Denied		1/9/2014 5:35:31 PM			Day Treatment Intensive, Full Day	Edit / Add New
	232	ProviderConnect		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
	249	ProviderConnect		Complete	Pending	1/7/2014 7:09:26 PM	1/8/2014 5:48:42 PM	1/1/2014	3/31/2014	Family Therapy w/ Client , Multi-fam Gp Therapy	Edit / Add New

Create Request



# AUTHORIZATION DETAILS

- Enter the Diagnosis – Primary and Secondary. Type in the diagnosis code or description. A list will appear to select.

Diagnosis	
Primary Diagnosis	<input type="text"/>
Secondary Diagnosis	<input type="text"/>

296 - Bipolar I Disorder, Unspecified  
 296.00 - BIPOLAR I DISORDER, SINGLE MANIC EPISODE, UNSPECIFIED  
 296.01 - BIPOLAR I DISORDER, SINGLE MANIC EPISODE, MILD  
 296.02 - BIPOLAR I DISORDER, SINGLE MANIC EPISODE, MODERATE  
 296.03 - BIPOLAR I, SINGLE MANIC EPISODE, SEVERE W/O PSYCHOTIC FEATURES  
 296.04 - BIPOLAR I, SINGLE MANIC EPISODE, SEVERE WITH PSYCHOTIC FEATURES  
 296.05 - BIPOLAR I DISORDER, SINGLE MANIC EPISODE, IN PARTIAL REMISSION  
 296.06 - BIPOLAR I DISORDER, SINGLE MANIC EPISODE, IN FULL REMISSION  
 296.4 - Bipolar I Disorder Most Recent Episode Hypomanic  
 296.40 - BIPOLAR I DISORDER, MANIC, UNSPECIFIED  
 296.41 - BIPOLAR I DISORDER, MOST RECENT EPISODE, MANIC, MILD

- Enter the Funding Source, Benefit Plan and Contracting Provider program.

Funding Source & Benefit Plan Information	
Funding Source: - Please Choose One - *	Benefit Plan: - Please Choose One - *
Program: - Please Choose One - *	

Note : You will be provided with the funding source and benefit plan that should be used as part of the contract with LACDMH.

- <Click> **Add Code** under the procedure code section and add the procedure code(CPT Code) and number of units requested.

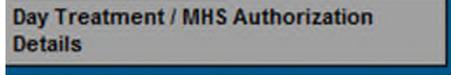
PROCEDURE CODE	UNITS REQUESTED
H2012.HE:TG - Day Treatment Intensive,Full Day	Enter 0 units to ignore added code. 0 <b>Remove</b>
<b>Add Code</b>	

For day treatment, the units will be the number of full day/half day sessions that you are requesting. For concurrent mental health services, it will be the number of minutes that you are requesting authorization. If you need authorization for multiple procedure codes, you can click the Add Code again. You can request up to 8 procedure codes

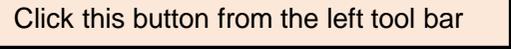


# DT/MHS AUTHORIZATION DETAILS

- After the completion of an authorization request, provider must complete the form 'Day Treatment/MHS Authorization Details' to provide additional details.



Day Treatment / MHS Authorization  
Details



Click this button from the left tool bar

- This screen has the following sections:
  - **Client Care Plan**- Allows the provider to complete the client care plan, print and get the client signature. A signed copy of the care plan must be attached to the authorization.
  - **Service Necessity Assessment** - Must be completed for all authorization request.
  - **Outcome/Progress Review** - Must be completed if requesting any new authorization for an existing client.
  - **CAU Authorization Response** – This sections will provide the status details such as when the request received, who is DMH contact staff, what is the status of the request etc.
  - **Plan Communication** – This is a method DMH and provider communicates, if any additional information is required.
  - **Discharge Notification** – This sections allows you to request DMH for an early termination of the authorization.
  - **Signatures** – Collect the details of the signatures received on the client care plan.



# AUTHORIZATION RESPONSE

- Once LACDMH updates the decision, the decision can be viewed on this screen.
- The screen has multiple sections which will provide the authorization status, units authorized and date.

Authorization Information	
AUTHORIZATION NUMBER: 38	CURRENT AUTHORIZATION STATUS: A - Approved
AUTHORIZED LEVEL OF CARE:	TYPE OF AUTHORIZATION:
PLANNED ADMIT DATE:	INITIAL OR CONTINUING AUTH:

Provides the status of the authorization. Approved/Denied. If the status is Denied – look for the Denial Notice of Action letter in the attachment section.

Authorization Status Reason
CURRENT AUTHORIZATION STATUS REASON: APPRFULL - Authorization Request Fully Approved
PERFORMING PROVIDER TYPE:
NEXT REVIEW DATE:

Provides the authorization status reason. It provides the information such as approved full, approved partial, and if the status is denied, why it is denied.



# Approved Units/Approved Days

- Authorization response screen has a section at the bottom which will indicate the units requested and units authorized.
- Authorization request dates and authorization approved dates.

UNITS REQUESTED	UNITS AUTHORIZED
10	10

Units that are authorized and can be claimed against. If the authorized units are less than the requested units, you will see a partial approval notice in the attachment.

Authorization Dates
<b>Requested:</b> 8/1/2013 - 9/14/2013
<b>Authorized:</b> 8/1/2013 - 9/14/2013

Displays the approved authorization period in which the treatment can be carried out. For day treatment, if the requested days span across the fiscal year, the end date will be the fiscal year end date.

<b>CURRENT AUTHORIZATION STATUS REASON:</b> APPRFULL - Authorization Request Fully Approved
<b>PERFORMING PROVIDER TYPE:</b>
<b>NEXT REVIEW DATE:</b>

If the requested days of authorization span across the fiscal year, the requested authorization end date will be displayed as the next review date.



# QUESTIONS?



# PROVIDERCONNECT TRAINING

## Giri Patterikalam

Contract Provider Readiness Meeting  
February 5, 2014



# OVERVIEW

- What to expect for training
- Who will be trained
- What will be covered in training
- How will training be delivered
- Where and when will training occur



# TRAINING GOAL

To provide you with the knowledge and skills to perform job functions using ProviderConnect.



# TRAINING OBJECTIVE

To bridge the gaps between your current job functions and the way you will perform job functions in the IBHIS environment.



# WHO WILL BE TRAINED?

- Legal Entity Providers
  - Day Treatment Services
  - Concurrent Mental Health Services for Day Treatment Clients

# WHAT WILL BE COVERED?

## Day Treatment Providers (Legal Entities)

- Review what processes are the same.
- Complete forms (created to be similar to existing forms).
- Review and use new applications replacing current ones, if applicable.
- Review and use new applications replacing current manual paper process, if applicable.
- Review gaps between old and new job functions – not large.
- Practice new ways to capture information.
- Practice how to request service authorization.



# WHAT WILL BE COVERED? continued

Legal Entity Providers training agenda includes how to:

- Search for clients
- Create and edit service authorizations
- Check status for submitted service authorizations
- Communicate with Central Authorization Unit via ProviderConnect
- Remove a client from Day Treatment



# HOW WILL TRAINING BE DELIVERED?

Mode of delivery:

- Instructor-led on-line training via Webex
- Instructor-led classroom training

Duration:

- 4 hour of instruction
- Post training practice



# NEXT STEPS

When will training occur?

- During the readiness process, i.e.:
  - After provisioning
  - Before testing

How will I know?

- Prior notification regarding training.



# QUESTIONS?



# REPORTS AND EXTRACTS

**Presley Becerra**

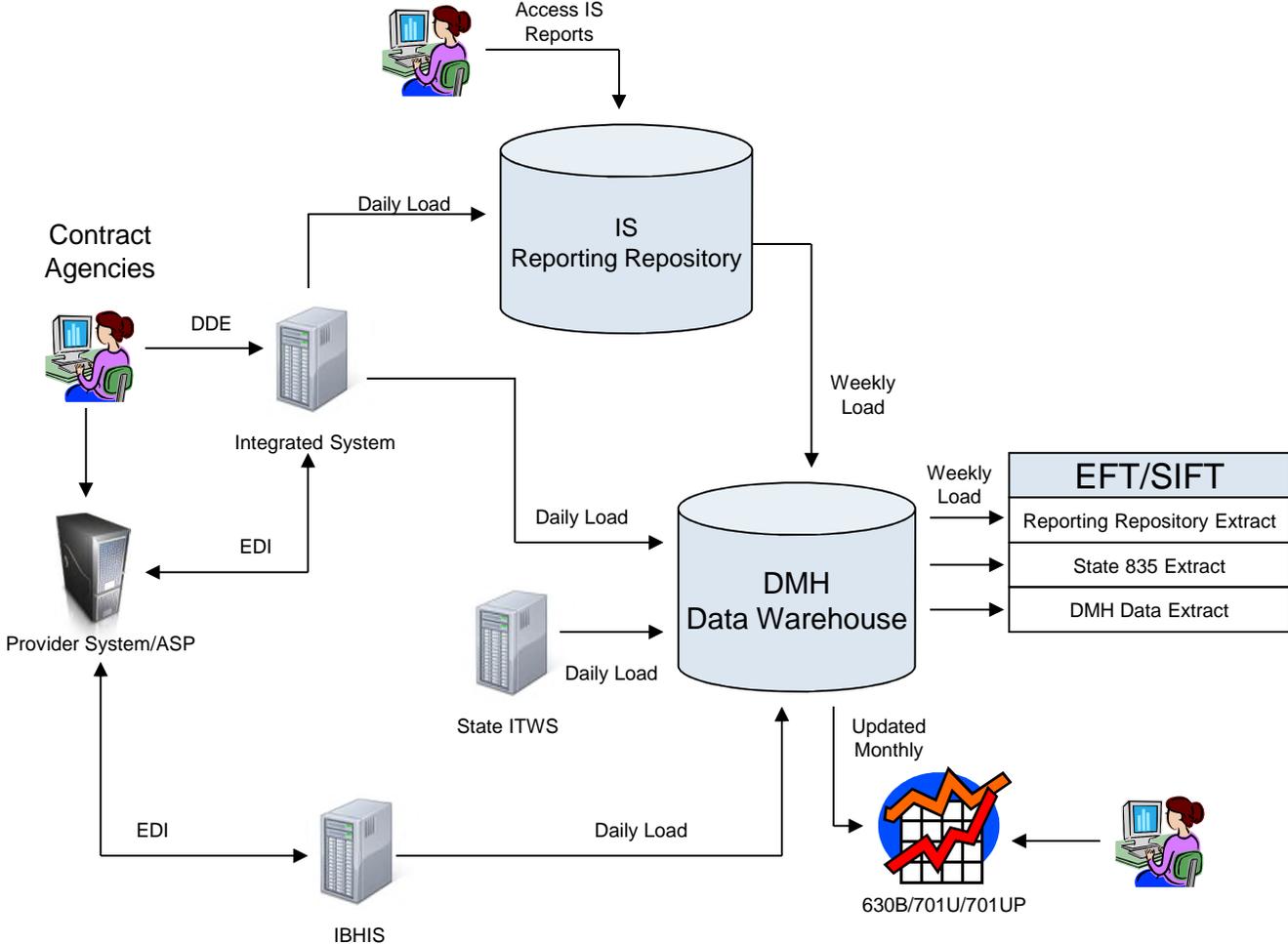
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# REPORTS and EXTRACTS

- 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

Contract Provider Readiness Meeting  
February 5, 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](mailto:CPTT@dmh.lacounty.gov)
- Review the IBHIS EDI Website(s) regularly for updates
- Legal Entities
  - [http://lacdmh.lacounty.gov/hipaa/IBHIS\\_EDI\\_homepage.html](http://lacdmh.lacounty.gov/hipaa/IBHIS_EDI_homepage.html)



# QUESTIONS



# IBHIS READINESS SCHEDULE READINESS GROUP FOUR

## Gordon Bunch

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# IBHIS ROLLOUTS: LEGAL ENTITY (LE) CONTRACT PROVIDERS

- IBHIS Pilot 1-A January 27, 2014
  - Directly Operated Sites and Programs only
- Pilot 1-B February 20, 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 4

- Provisioning Start: March 4, 2014
- Provisioning End: April 1, 2014
- Testing Start: April 2, 2014
- Testing End: May 30, 2014
- Go-Live to IBHIS: July 1, 2014



# LATER READINESS GROUPS LEGAL ENTITIES

## Readiness Group 5:

Provisioning Start: 4/3/14

Testing End: 6/30/14

Requests for Change of Readiness Group will be considered



# QUESTIONS

