ENTERING CLIENT SERVICES

DMHAS Information Systems Division

April 2015

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STEP 1: Log into DDaP. The Provider Suite of Applications will display.

> If you are unable to log in and need your password reset,
> contact the Help Desk: 860-262-5058 or DMHAS.Info@ct.gov.

PROVIDER SUITE OF APPLICATIONS

There are 3 sections in the Provider SUITE OF APPLICATIONS:

- **DMHAS Data Performance (DDaP)** - Select for admissions, discharges, updates, assessments and services
- **DMHAS Data Warehouse** – Select for reports
- **DMHAS Consumer Survey** – Select to complete Consumer Surveys

STEP 2: Select the **DMHAS Data Warehouse** link to run the Service Summary and Detail report in order to see which clients have or have not had services entered in DDaP.

The **SERVICE SUMMARY AND DETAIL REPORT** is in the **Client Reports** folder and displays service information for clients within a provider and program for a given period of time.

1. Enter a **Start Date** and **End Date** in the correct MM/DD/YYYY date format, or use the calendar.
2. Select the **Provider**.
3. Select one, or more or 'select All' from the drop lists:
    - **Funding Source**
    - **LOC** (Level of Care)**Type** and **LOC Mode**
    - **Program**
4. Select 'Service Details' or 'Service Summary' for **Report Type**.
5. Select 'Clients With Services', 'Clients Without Services', or 'Both' for **Populaton**. *(If 'Service Summary' is selected for 'Report Type', the 'Population' will only display 'Clients with Services'.)*

6. **Collapse Groups:** Select 'False' for to see individual service code details for each client or leave 'True' selected to see client listing with total services.

7. Select the **View Report** button to view the **Service Summary and Detail** report.

8. A listing of clients will display based on the criteria selected.

9. A listing of clients will display based on the 'Population' selected.

Start Date	4/1/2012		End Date	4/30/2012			View Report
Provider	Bridges		Funding Source	DMHAS Human Services Agree			
LOC Type	Case Management, Outpatient		LOC Mode	Standard Outpatient			
Program(s)	Addiction Outpatient 988200, M		Report Type	Service Details			
Population	Both (W/ and W/O)		Collapse Groups	⊙ True ○ False			

1 of 3   100%   Find | Next

State of Connecticut
Department of Mental Health and Addiction Services
Service Summary and Detail Report
From: 4/1/2012   To: 4/30/2012

Provider: Bridges

Program Name	Program Code	Total Unduplicated Clients Active in Program: 513							
Mental Health Outpatient608210	L009608210	Total Unduplicated Clients with Services: 333							
Prov Client ID	**Client Name**	**SSN**	**DOB**	**Sex**	**Admit Date**	**Dischr Date**	**Total Hrs**	**Total Days**	**Total Incidents**
⊞ 11111	ATest1, Client	123-00-1234	11/1/1988	Female	4/20/ 2000		2.00	0	0
⊞ 222122	ATest2, Client	222-00-3333	11/3/1965	Female	5/4/2000		1.00	0	0
⊞ 10006	ATest3, Client	111-00-1111	11/1/1977	Male	11/3/1997		1.00	0	0
⊞ 0099000	ATest4, Client	000-11-0000	11/10/1981	Female	12/9/1997		0.33	0	0

10. Select the 'plus' sign ⊞ icon to display the service details.

11. The services that were provided to the client for that time period will display.

> The ⊞ 'plus sign' becomes a ⊟ 'minus sign' when the selected.
> To collapse the service detail listing, select the 'minus' sign.

Start Date	4/1/2012		End Date	4/30/2012			View Report
Provider	Bridges		Funding Source	DMHAS Human Services Agree			
LOC Type	Case Management, Outpatient		LOC Mode	Standard Outpatient			
Program(s)	Addiction Outpatient 988200, M		Report Type	Service Details			
Population	Both (W/ and W/O)		Collapse Groups	⊙ True ○ False			

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⊟ 11111	ATest1, Client	123-00-1234	11/1/1988	Female	4/20/ 2000		2.00	0	0
CPT Code	**Description**	**Start Date**	**End Date**	**Unit**	**Duration**	**Measure**			
90804	Individual Psychotherapy (face to face) 20-30 min	11/3/2010	11/3/2010	1	0.50	Hours			
		11/12/2010	11/12/2010	1	0.50	Hours			
90806	Individual Psychotherapy (face to face) - 45-50 minutes	10/20/2010	10/20/2010	1	1.00	Hours			

If 'Both' is selected for **Population**, and a client has _no services_, the client information will highlight in gray and, when the ⊞ 'plus' sign is selected, white space will display below instead of service detail.

STEP 3: *Once you have a listing of clients who need services entered in DDaP, close out of reports and select the* **DMHAS Data Performance (DDaP)** *link.*

Confirm that those who have not had services entered in DDaP are still active clients.

The Client Management screen displays when **DMHAS Data Performance (DDaP)** *is selected.*

STEP 4: *In Client Management, search for an individual client and enter services for that one client or search by Roster Management to enter services for several clients in your program. (See instructions for ROSTER SEARCH on the next page.)*

ROSTER SEARCH

1. Select the **Roster Management** tab.
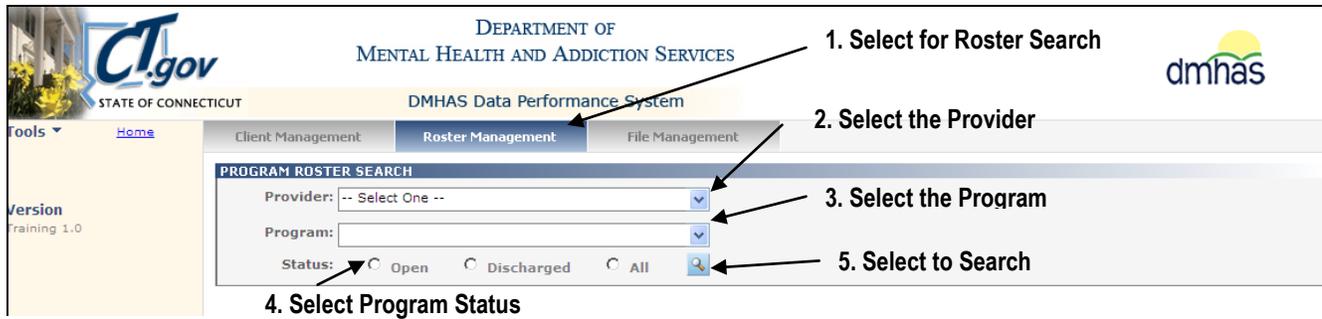
2. Select the **Provider** from the drop list.

3. Select the **Program** from the drop list.

4. Select the **Program Status** radio button: Open, Discharged or All.

5. Select the **Search** 🔍 icon on the screen.

6. A list of all clients and admissions will display for that Program and Provider.
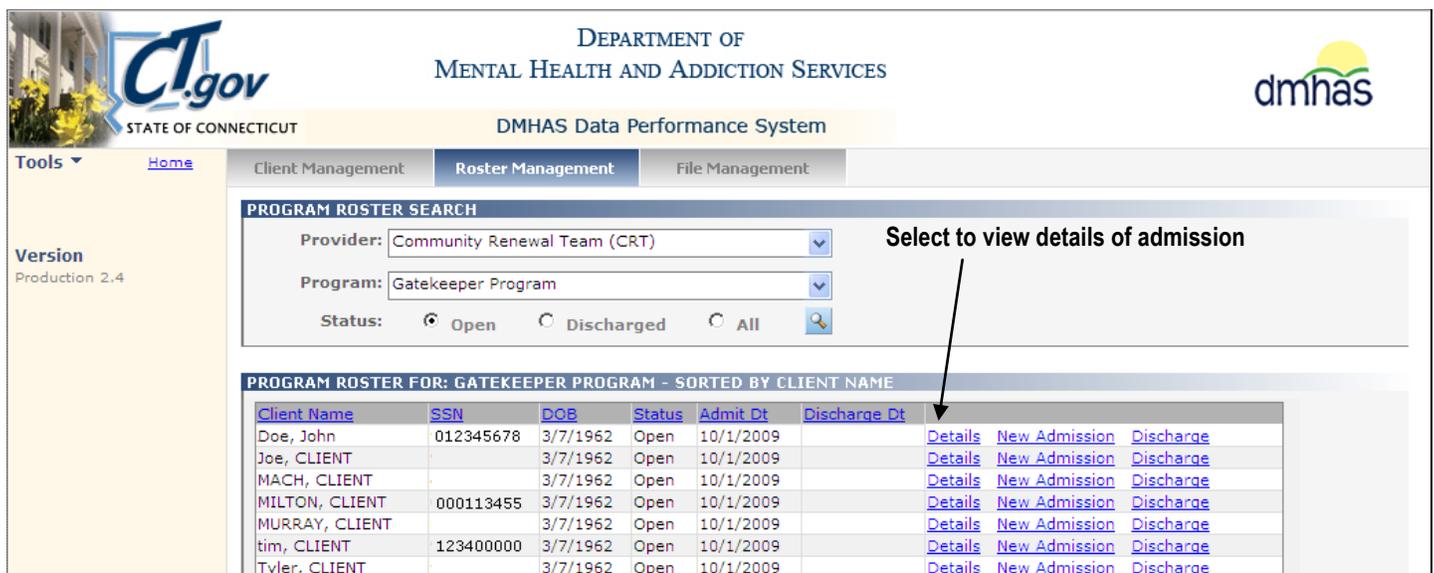
7. Select Details next to the client or admission for which you want to view details.

8. The Client Profile screen will display.

STEP 5: *Enter client services by following the 'Entering Client Services' instructions on the next several pages.*

ENTERING CLIENT SERVICES

Once a client has been admitted to a program, if services are required for the program, they need to be recorded on the **SERVICES** screen in the DDaP system on a monthly basis. Service entries should be made by the 15th of the month for the previous month. (Ex. October services should be entered in DDaP by November 15th, November services by December 15th, etc.)

The **SERVICES** screen is located under the **Services** tab in DDaP.

1. Select '**Services**' on the Navigation Bar. The **Service Start Date Between** dates will display.

The '**Service Start Date Between**' dates will default to a 90 day period dating back from today's date. These dates can be changed to view existing Services in the given date range.

2. To **Enter Service Data** provided for a client by one of your programs, follow these steps:

    1. Select the **NEW SERVICE** button in the **SERVICE INFORMATION** screen.

        *THE **SERVICE INFORMATION** SCREEN WILL DISPLAY.*

SERVICE INFORMATION

The established Current Procedural Terminology (CPT) and Health Care Provider Codes (HCPCS) for behavioral health, along with some other codes, such as transportation service codes, can be found in DDaP on the Side Bar, under Tools / Documentation / Service Codes.

2. Complete the **SERVICE INFORMATION** data fields as noted below:

SERVICES	**REQUIRED FIELD**. Select the Service from the drop list or enter the code to display the Service and select it from the list.
START DATE	**REQUIRED FIELD**. Enter the date that a client began to receive a given service in the correct date format - MM/DD/YYYY, or select the date in the calendar. The date must be greater than or equal to the Admission Date, less than or equal to Service End Date, less than or equal to the discharge date, and less than or equal to the current date.
END DATE	**REQUIRED FIELD**. Enter the date when a client stopped receiving a given service in the correct date format -MM/DD/YYYY, or select the date in the calendar. The date must be greater than or equal to the admission, greater than or equal to the Service Start Date, less than or equal to the discharge date and less than or equal to the current date.

SERVICE INFORMATION data fields (Cont.)

DURATION	**REQUIRED FIELD**. Enter the length of time of service, in minutes or days, for a client.
SERVICE UNITS	**REQUIRED FIELD**. This field contains the number of "units" of a service given to a client. For services based on **minutes,** the **unit refers to the number of units of service provided in a given day.** Only one service type per client per program is allowed - **A single instance of a given service. Each time a service is administered is considered one unit.** Ex.: Three (3) Case Management services in a given day would be represented as '3' units. This field is numeric, and is required if services have been provided. *Note: Cannot exceed 100.*
SERVICE LOCATION ID	Select the Service Location from the drop list, e.g. office, where a client received a service. (*If a particular service was provided in more than one location, select the location that was used the most, or divide the services up between the locations accordingly.*)

3. When you select a TCM (Targeted Case Management) Service from the Service drop list, the **TCM Information** fields will display.

4. Complete the TCM data fields as noted below:

CLINICIAN FIRST NAME	Enter the First Name of the Clinician administering the service to a client.
CLINICIAN LAST NAME	Enter the Last Name of the Clinician administering the service to a client.
CLINICIAN CREDENTIALS	Enter the highest degree or license held by the Clinician administering the service, or select from the drop list.
DIAGNOSIS CODE FOR PROCEDURE	Enter the Diagnosis Code that pertains to the specific TCM service being provided, or select from the drop list.

The TCM Information fields **will not** display if the service selected is **not** TCM.

MINUTE-BASED SERVICES:

NonTreatment Programs- 'Batching' Allowed: Services can be combined for Non Treatment Programs for like service codes. For any given month, the total number of minutes can be entered in the Duration field and the total number of services can be entered in the Service Units field. One service that is provided for a client equals one Service Unit.

*Example***:** If twenty (20) thirty minute Case Management w/ Client face-to-face Services (ex. T1016) were provided during the month of October (5 times a week for 4 weeks), they would be entered as '20' Service Units. The Duration would be the number of Services Units provided times the length of time for the service (30 minutes). *See the details below.*

1. Select the **Service** code: Select 'T1016 – Case Management w/ Client Face to Face' from the drop list.

2. Enter the **Start Date** and the **End Date:** Select from the calendar or enter **'**10/1/2014' for the **Start Date** and '10/31/2014' for the **End Date**. (*Enter the first and last day of the month.*)

3. **Duration**: Multiply **Minutes** (30) times the **Services Units** provided (20): 30 x 20 = **600**.   Enter '600' for the **Duration**.

4. **Service Units**: Multiply services per week (5) times number of weeks (4): 5 x 4 = **20**
    Enter '20' for the **Service Units**.

5. Select the **Service Location** from the drop list.

6. Select the **SAVE** button at the bottom of the screen.

When adding services for a particular month, if a client was admitted after the first of that month or discharged before the end of that month, enter the Start Date and End Dates based on the Admission and Discharge Dates. For the Example above, if the client was discharged on 10/25, enter 10/25/2014 for the End Date. ***Services cannot be added after the discharge date (or before the admission date).***

7. The service information will display on the **SERVICES** screen.

8. Select the **NEW SERVICE** button to add more services. *THE SERVICE INFORMATION SCREEN WILL DISPLAY.*

9. Select the **Service** code from the drop list, enter the **Start Date** and **End Date**, enter the total Duration and the total number of **Service Units** and select **Service Location** from the drop list.

10. Select the **SAVE** button at the bottom of the screen.

11. The service information will display on the **SERVICES** screen.

12. Select the **NEW SERVICE** button to add a new service.

13. Select the **CLIENT MGT** button to go back to the Client Management screen.

14. Select the **ROSTER MGT** button to go back to the Roster Management screen.

DUPLICATE SERVICES

Duplicate Services in the Same Day must be combined:

MINUTE-BASED SERVICES: The DDaP system only allows for *one distinct service record for a client in a particular program with specific method of contact per day. This applies to Treatment and Non-Treatment programs*.

Example: Two 60 minute Case Consultation services (90888) provided on 10/16/2014 would be entered as:

> **Start Date**: 10/16/2014 and **End Date**: 10/16/2014

> **Duration**: 120 (60 minutes X 2) and **Service Units**: 2

Treatment Programs – NO 'Batching' Allowed: For **Minute Based Services** that **do not allow 'batching'**, you can enter the same service that is provided on multiple days by selecting the **SAVE AND ADD ANOTHER** button and entering the **Start Date** for each service.

1. Select the minute based service from the 'Service' drop list.

2. Enter the Start Date, the Duration (number of Minutes) and Service Units.

> Each service equals 1 Service Unit. Example: One 45 minute Service = 1 Service Unit. Two 45 minute services provided in 1 day would be entered as Duration: 90 Minutes and Service Units: 2.

3. If adding the same service for multiple dates, select the **SAVE AND ADD ANOTHER** button. (Select the **SAVE** button if only adding the service for one date.)

4. Enter the next date of the service and select the **SAVE AND ADD ANOTHER** button.

> ***The Duration must 6 minutes or more with a maximum of 1440 minutes or an error will display. (Duration of Service - Invalid Duration)***

5. Continue to enter dates for services provided for that reporting period, selecting the **SAVE AND ADD ANOTHER** button after each date is entered.

6. The services will display in the grid.

7. Select the **SAVE** button once the last date of the service is entered.

8. All services entered will display in the **SERVICES** grid in Start Date order.

> If **SAVE AND ADD ANOTHER** is selected and there are *no more dates to enter for that service (date field is blank)*, an error will display. Confirm that the services in the grid are all there and select the **CANCEL** button. The services will display on **SERVICES** screen

TARGETED CASE MANAGEMENT SERVICES (TCM)

TCM Services are the continuum of activities, with or on behalf of a client, concerned with assessment, planning, linking, support and advocacy. TCM services include assisting a client in accessing needed housing, medical, clinical, social, educational, and other services. ***Search on 'Targeted Case Management' in the CT.gov website or contact your Regional Manager if you have any questions regarding TCM services.***

Targeted Case Management Services must be entered for each date that the service was provided. *(Cannot be 'Batched')*. To add TCM Services for **Non-Treatment programs** (there will be a Start Date and an End Date), follow the steps below:

1. Select the **TCM Service** from the **Service** drop list. (They are the last 3 on the drop list -TCM01, TCM02 or TCM03)
2. Enter the <u>same</u> date in the **Start Date** and **End Date** fields.
3. Enter the number of minutes for that service (Ex. 30) and enter '1' for **Service Units**.
4. Select the **Service Location** and complete the **TCM INFORMATION** fields.

5. Select the **SAVE AND ADD ANOTHER** button.

Example above: A 30 minute TCM with Client Face-to-Face service (ex. TCM01) provided several times a week during the month would be entered as follows:

>   **1.** Select 'TCM01 - TCM with Client Face-to-Face' from the **Service** drop list.
>
>   **2.** Enter the <u>first</u> date that the service was provided for that month in the **Start Date** field (10/6/2014) <u>and</u> enter the same date ('10/6/2014') in the **End Date** field.
>
>   **3.** Enter '30' for **Duration** / **Minutes**.
>
>   **4.** Enter '1' for **Service Units**.
>
>   **5.** Complete the TCM Information fields.
>
>   **6.** Select **SAVE AND ADD ANOTHER** to add more TCM01 services.

6. The first service entered will display in the **SERVICE DATE(S) SAVED FOR**…grid.

The Service Code cannot be changed here. (Select **SAVE** and select the **NEW SERVICE** button to add a different service.)

7. All the fields <u>except the **Start Date**</u> and the **End Date** retain the original data.

8. Enter the next date of service (10/10/2014) in the **Start Date** and **End Date** fields.

9. Select the **SAVE AND ADD ANOTHER** button at the bottom of the screen.

10. The next service entered will display in the **SERVICE DATE(S) SAVED FOR**…grid.

11. Enter the next date of service in the Start and End date fields and select the **SAVE AND ADD ANOTHER** button at the bottom of the screen.

12. Continue to add Start and End Dates and selecting **SAVE AND ADD ANOTHER** until all dates, *except the last date*, have been added for that service for that reporting period.

13. Select the **SAVE** button *when the last Start and End Date has been entered.*

\

14. The Services will display in the SERVICES grid.

*TCM Services that are being added for Treatment programs are added the same way that the any of the Treatment programs by selecting the **SAVE AND ADD ANOTHER** button and entering the **Start Date** for each service. (See Treatment Programs-No 'Batching' Allowed section.)*

*TCM Services **CANNOT be deleted or updated**. Hold your mouse over services to see which cannot be deleted or updated. **Contact EQMI – 860-418-6601 or 6611 for TCM questions.***

ADDING MULTIPLE DAY-BASED SERVICES

Day-Based Services that can be 'batched', will allow the user to enter a Start Date and End Date for the month or given period of time, so that multiple Days and Service Units can be entered for that Service.

1. Select the 'Per Diem' based service from the 'Service' drop list.

2. Enter the desired date range.

3. Enter the number of **Days** to match the date range.

4. Enter the number of **Service Units** based on how many services were provided during that date range.

5. Select the **SAVE** button.

6. Repeat steps 1-4 to enter additional 'Per Diem' services,

Day-Based Services that do not allow 'batching', must have the correct number of Days and Service Units to match the date range entered. In the example below, '16' has been entered for the number of days between 10/16 and 10/31. 10/31 – 10/16 = 15.

Change the Days and Service Units to '15' and select the SAVE button to remove the error and save the service.

ADDING MULTIPLE INCIDENT-BASED SERVICES

1. Select the 'Incident' based service from the 'Service' drop list.
2. Enter the desired date range.
3. Enter the number of **Incidents** to match the date range.
4. Enter the number of **Service Units** based on how many services were provided during that date range.
5. Select the **SAVE** button.

> *For **Incident Based Services** <u>that do not allow batching</u>, the Duration must equal the number of Incidents based on the '**Start**' and '**End**' dates. Subtract the **Start Date** from the **End Date** or an error will display. The **Duration** (number of Incidents) and **Service Units** will be the same.*

Example above: 10/25 (**End Date**) – 10/21(**Start Date**) = 4 **Incidents**

6. Adjust the numbers of **Days** and **Service Units** accordingly and select the **SAVE** button.

7. Repeat steps 1- 5 to enter additional 'Incident' based services

If entering a service for 1 day (1 **Incident**), the **Start** and **End** dates <u>must be the same</u> and the **Incidents** <u>must be 1</u>.

8. All services that were entered will display in the Services grid in Start Date order.

UPDATING SERVICE ENTRY INFORMATION

If a Service that has been entered into DDaP and 'Saved' for a client <u>needs to be modified</u>, changes can be made to: Duration (Minutes, Days or Incidents), Service Units, End Date and Location fields. *The Service Code and Start Date can only be changed by deleting and adding as a new service.*

All services can be edited or deleted except TCM Services.

To delete a service:

1. Select the ✕ icon to delete a service (except TCM).
2. Select **OK** when the message box displays. (Select NO to not delete.)
3. The service will be removed from the grid.

To make a change to a service:

1. Select the edit 📝 icon in the grid for the service to be updated.
2. The Service information screen will display with the information for that service.
3. Update the fields as needed and select the **SAVE** button.
4. The updated service information will display on the **SERVICES** screen.

- Select the **NEW SERVICE** button to add a new service.

- Select the **CLIENT MGT** button to go back to the Client Management screen.

- Select the **ROSTER MGT** button to go back to the Roster Management screen.

ERROR MESSAGES

🎳 SERVICES CANNOT BE DATED BEFORE THE ADMISSION DATE

Even though services can be 'batched' for the month, *the service Start Date cannot be before the Admission Date.*

Do as follows to remove the error:

1. Enter the Admission Date for the Start Date.
2. Enter the end of the month date for the End Date.
3. Enter the Duration and number of Service Units accordingly.
4. Service dates for each month going forward can be entered from the 1st to the 30th or 31st as long as the client is active and receiving the services.

🎳 THE DURATION CANNOT BE MORE THAN 1440 MINUTES OR LESS OR 6 MINUTES

- Adjust the Duration accordingly to remove the error.

DUPLICATE SERVICE CODES IN THE SAME DAY: If a specific service has already been entered for the client for that date, an error will display.

1. If the service was provided more than once for that date, add the service minutes together for the **Duration** and enter '2' for **Service Units**.
2. If it is a duplicated entered in error, select the **CANCEL** button at the bottom of the screen.

SERVICES ADDED AFTER DISCHARGE: Services cannot be dated after the client has been discharged or errors will display.

1. Select the Admissions tab to confirm the Discharge Date. (The Discharge Date was 10/31/2014.)
2. Enter the appropriate Start and End Dates. (Confirm the service dates and change accordingly.)

Services can be added <u>on or after the Admission Date</u> and <u>on or before the Discharge Date</u>.

🎨 SAVE AND ADD ANOTHER SELECTED WITH NO MORE SERVICE DATES TO ENTER:

If you select the **SAVE AND ADD ANOTHER** button instead of the **SAVE** button and do not have another date to enter for that service for the reporting period, error messages will display.

1. Confirm that all the service dates are listed in the grid.

2. Select the **CANCEL** button to remove the error messages.

3. The services that were entered will display in the SERVICES grid.

STEP 6: **Once you have completed service entries for your client(s), log out of the DMHAS Data Performance System to ensure the confidentiality of the client data.**

To logout, follow the steps below:

1. Click on the Home link on the Side Bar.

2. Once back on the Provider Suite of Applications screen, select Log out on the Side Bar.

3. Click on close (**X**) button on the upper right end of the screen.