# PSYCKES iOS Mobile Application

**User's Guide** 



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#### **PSYCKES iOS Mobile Application**

The PSYCKES mobile application for iOS devices (iPhone & iPad) was developed to provide quick, portable access to a client's PSYCKES Clinical Summary. The mobile app will be particularly convenient for users who interact with clients in the community; however, it can be used by any PSYCKES user with an iOS device. For more information about the PSYCKES application, visit the PSYCKES homepage.

#### Requirements for installing the PSYCKES mobile app

Before installing the PSYCKES mobile app, the following requirements must be met:

#### **Technical Requirements**

- 1. iOS device (iPhone, iPad, iPod; in the future, we hope to develop an app that is compatible with Android devices)
- 2. The latest version of iOS; users can check to see if an upgrade is needed by navigating to Settings > General > About and look for "Software Version" If your version is not 13.0 or higher, navigate to Settings > General > Software Update and select "Install Now" for latest update
- 3. iPhone 5 and above; iPad Mini 2 and above; iPad Air; iPad Pro 9.7 & 12.9; THE iPad

#### **Pre-Login Requirements**

- 1. In order to use the PSYCKES mobile app, the user must be granted access to PSYCKES by their provider agency. Access for individual users is managed by an agency's Security Manager(s). To find out if your agency has access to PSYCKES or who your Security Manager is, contact PSYCKES Help Desk.
- 2. Users cannot login from the PSYCKES mobile app if it is their *first time* logging in to the application. Users will need to login at least one time on the desktop version, set up their PIN for their token, and then subsequent logins can be done on the PSYCKES mobile app.

#### Installing the PSYCKES mobile app

To use the PSYCKES app, users will need to install it from the iOS App Store.

Install PSYCKES mobile app:

- 1) Tap the App Store icon on iOS Device
- 2) Search for "PSYCKES"
- 3) Install the free PSYCKES mobile application (App Store account password may be required)

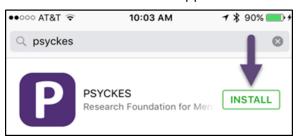


Figure 1. PSYCKES Mobile App

# Installing and importing token into the RSA SecurID Token app

An RSA SecurID security token is required in order to login to PSYCKES. It generates a random set of numbers at 60-second intervals and these numbers are what will be inputted into the "passcode" section of the PSYCKES login page. These security tokens are provided to users by OMH.

There are two forms of security tokens — a physical "hard" token that looks like a keychain and a software "soft" token" that can be downloaded onto a computer or smartphone. A hard token may be used to login to the mobile app; however, we recommend installing a soft token onto your iOS device for the convenience of having your token and PSYCKES mobile app in one place.

#### Install RSA SecurID App

- 1. Tap the App Store icon on iOS Device
- 2. Search for "RSA SecurID"
- 3. Install the RSA SecurID app
- 4. If prompted, enter your Apple ID or iTunes account credentials

#### Import Token from Email

- 1. Soft tokens are sent via email to user's email address listed in SMS
  - Users who have a hard token but would prefer to use a soft token can request to have a soft token sent to them by the OMH Security team
- Locate the original email from the OMH Security team by searching your email inbox for: <u>its.sm.bhp.bs.omh.sao@its.ny.gov</u> or <u>Information\_Security\_Office@omh.ny.gov</u>
  - a. If necessary, forward the token email to an email account where you can access it on your device

3. Using your phone, open the e-mail from OMH containing the token file attachment (for example, "token1/sdtid") and tap on the attachment:

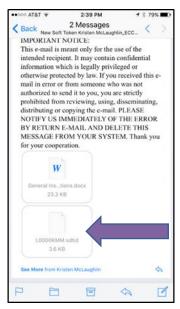


Figure 2. OMH email with token and installation instructions

**5.** Enter the token file password that was provided in OMH email:



Figure 4. Enter token file password

**4.** Select RSA's "Import with Token" option:



Figure 3. Import token into RSA app

**6.** Confirmation Message will display once token is successfully imported:



Figure 5. Confirmation message when token is imported

#### **Logging In**

Individuals granted PSYCKES-Medicaid access will be assigned the following:

- 1. OMH User ID
- 2. RSA SecurID security token

Follow the steps below to login to the PSYCKES mobile app:

- 1. Tap on the PSYCKES mobile app icon
- 2. Enter User ID
- 3. If the RSA token is downloaded on your iOS device, open the RSA app, input your PIN, and select the blue arrow on the right

**Note:** If you did not download RSA SecurID Token app onto your iOS device, you can use your soft token on your desktop or hard token keychain and manually type in the passcode into the PSYCKES app login page. If users would prefer a soft token, they should contact their Security Managers and have them put that request in SMS, or contact the ITS Helpdesk:

For NYS state employees (i.e. OMH, DOH, OASAS, etc.): <a href="mailto:fixit@its.ny.gov">fixit@its.ny.gov</a>
For community providers: <a href="mailto:healthhelp@its.ny.gov">healthhelp@its.ny.gov</a>



Figure 6. PSYCKES login page for mobile app

4. The 8-digit time-sensitive passcode will appear in the soft token app, including the seconds remaining to use that specific passcode. Tap the copy icon at the bottom of the screen (as shown in Figure 7) in order to copy the passcode. Return to PSYCKES app login page, double tap to paste passcode and tap Login.

**Note:** If using a hard token to login to the mobile app, enter your PIN + the 6 digits from the hard token into the passcode line.

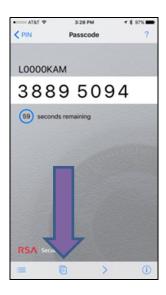


Figure 7. Passcode from RSA

 Once you have logged in by entering in your User ID and passcode, you will be prompted with the Medicaid Confidentiality agreement. If you select 'Agree,' you'll be fully logged into PSYCKES. If you select 'Disagree,' you will be brought back to the login screen.



Figure 8. Medicaid Confidentiality Agreement

#### Need Help Logging In?

On the PSYCKES mobile app login page, there is a "Need help logging in?" link that provides users with instructions/answers to common login questions. Additionally, contact information is provided if users have follow-up questions.

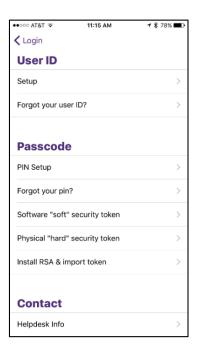


Figure 9. "Need Help Logging In" Page

For troubleshooting login issues; contact the ITS Help Desk:
For NYS state employees (i.e. OMH, DOH, OASAS, etc.): <a href="mailto:fixit@its.ny.gov">fixit@its.ny.gov</a>
For community providers: <a href="mailto:healthhelp@its.ny.gov">healthhelp@its.ny.gov</a>

For questions about the PSYCKES application; contact <a href="PSYCKES-help@omh.ny.gov">PSYCKES-help@omh.ny.gov</a>

#### **Recipient Search**

Once you have logged into the PSYCKES mobile app, the landing page is the Recipient Search. This is for users to find clients in order to view their clinical summaries. Users can search for individuals by one or a combination of recipient identifiers.

#### Recipient Identifiers

- Medicaid ID
- Social Security Number (SSN)
- First Name
- Last Name
- Date of Birth (DOB)

#### Why did my search yield no results?

There could be a few different reasons why a search could yield no results:

- Error entering client Medicaid ID or SSN
- Client is not in PSYCKES because new to Medicaid or no behavioral health history
- Client received behavioral health services using another Medicaid number or other insurance

#### Why did my search yield too many results?

If your search criteria match more than 10 recipients in PSYCKES, you will receive a message that instructs how to narrow results to find the intended recipient.

- Using unique identifiers (Medicaid ID or SSN)
- Searching by First Name, Last Name, AND DOB



Figure 10. Recipient Search page

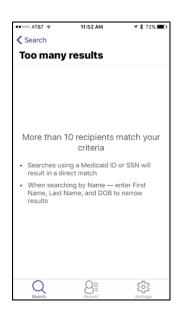


Figure 11. "Too many results" page

#### Recent Recipients



A special feature that the PSYCKES mobile app has that the desktop version does not is the "Recent" tab on the bottom of the Search page.

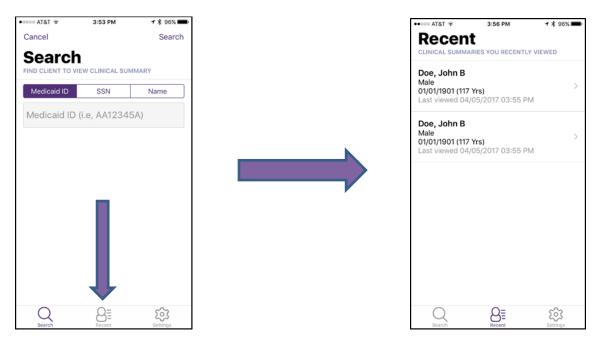


Figure 12. Recent tab icon

Figure 13. Recent list

This feature lets users see a list of clinical summaries that they have recently viewed, including the date and time in which they were viewed. The recent list will be in descending order (latest viewed record will appear first).

#### Remove Recipients from Recent List

To remove a client name from the recent list, simply swipe left on the client name and select "Remove."



Figure 14. Remove recipient from Recent List

#### **Clinical Summary**

The Clinical Summary in the PSYCKES mobile app provides the past **one year** of information on an individual client across treatment settings with some exceptions (See note below). Certain data has special protections, including information on substance abuse, HIV, family planning, and genetic testing, and will only be displayed in the Clinical Summary with client consent or in a clinical emergency (more information available in the Enable PHI Access section).

The Clinical Summary data is refreshed on a weekly basis.

**Note:** Alerts & Incidents (e.g., suicide attempt) will not be limited to the past one year only but will include all available data from the past 5 years. Additionally, the Hospital ER Utilization will display 5 years.

The Clinical Summary is separated into these 10 sections described in more detail below:

- General
- Current Care Coordination
- Alerts & Incidents
- Active Medicaid Restriction
- Quality Flags

- Plans & Documents
- Screenings & Assessments
- Diagnoses
- Medications
- Services

#### General

The General section of the Clinical Summary includes:

- Gender from Medicaid
- Date of Birth
- · Address from Medicaid
- Medicaid ID
- Dual-Eligibility (Medicaid & Medicare)
- Managed Care Plan
- HARP Status
- HARP HCBS Assessment Status
- Primary Care Physician (Managed Care Plan-Assigned)
- DSRIP PPS

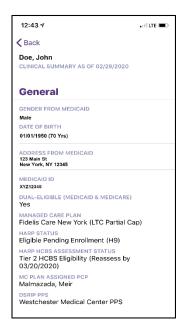


Figure 15. Clinical Summary:
General Section



A special feature that is available only in the PSYCKES mobile app is the ability to view a map of the client's address by tapping on address.

**Note:** Address may not be current, depending on the accuracy of the Medicaid information and when it was last updated.



Figure 16. Clinical Summary: Client Medicaid Address Map

#### **Current Care Coordination**

The Current Care Coordination section appears in the clinical summary of recipients for whom information is available in the databases listed below. Current status and contact information is displayed for the following applicable services:

- Health Home and Care Management: Includes health home and care management provider name, start date, and main contact name and phone number. This information is updated weekly from the Department of Health (DOH) Health Home and Care Management file.
- Assisted Outpatient Treatment (AOT): Includes AOT provider name, enrollment date, and main contact name and phone number. AOT data is updated weekly from the Tracking for AOT Cases and Treatment (TACT) database.
- Assertive Community Treatment (ACT): Includes ACT provider name, start date, and main contact name and phone number. ACT data is updated weekly from the Child and Adult Integrated Reporting System (CAIRS) database.

 Transition from WMS to NYSoH Message: The following message will be displayed in the "Current Care Coordination" section of the Clinical Summary for clients who are required to use the NYSoH system for Medicaid recertification and Medicaid is either about to expire or already expired:

"Medicaid Eligibility Alert: This client must use the New York State of Health (NYSoH) enrollment system for Medicaid recertification (expiration: <date>). For More information contact NYSoH at 1-855-355-5777."

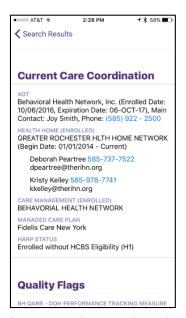


Figure 17. Clinical Summary: Current Care Coordination Section



Another special feature that is available only in the PSYCKES mobile app is the ability to call contacts directly from within the app by tapping on the blue phone number and selecting "Call."

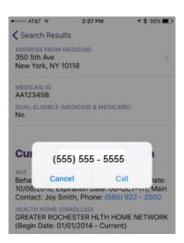


Figure 18. Calling providers from PSYCKES mobile app

### Additional Eligibility/Enrollment Messages Within Current Care Coordination

The following messages will appear in a client's Clinical Summary if applicable:

- OnTrackNY Early Psychosis Program enrollment information
- Health Home Plus eligibility
- OPWDD NYSTART eligibility
- POP High User and/or POP Potential Clozapine Candidate
- OMH Unsuccessful Discharge Lost to contact alert

#### Active Medicaid Restrictions

This section will only appear if the recipient has an active Medicaid Restriction. This data includes type of restriction(s) (e.g., inpatient pharmacy, physician), the begin date, and the name and contact information of the provider(s) to which the recipient is restricted. This data is updated weekly from the Medicaid database.

Users can contact physicians/pharmacy directly by tapping on the phone number.

#### Alerts and Incidents

The Alerts & Incidents section in the Clinical Summary displays information from the New York State Incident Reporting and Management System (NIMRS) as well as Medicaid service information with date of the service and name of the provider agency related to:

- Suicide Attempt
- Suicidal Ideation
- Self-Inflicted Harm/Injury
- Self-Inflicted Poisoning
- Overdose Opioid
- Overdose Risk Concurrent Opioid & Benzodiazepine past 1 year

**Note:** There is also a "View All" option located at the top of the section to view all alerts and incidents in chronological order.

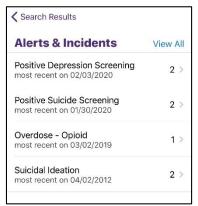


Figure 19. Alerts & Incidents Section

#### **Quality Flags**

Quality Flags identify areas of concern in a client's care or service utilization. Specific Quality Flags will be displayed for clients who meet criteria.

For more information about Quality Flags, please visit our PSYCKES webpage <a href="https://www.psyckes.org">www.psyckes.org</a> under "Quality Concerns."

#### Plans & Documents

This section allows the user to view previously existing plans or complete a safety plan using the Stanley-Brown Template. Safety Plans completed in the mobile app will attach to the client's Clinical Summary and be available for any PSYCKES user working with that client (with consent or in an emergency).

**Note:** Plan can be saved as a draft and finished later with same iOS device if it cannot be completed in one session.

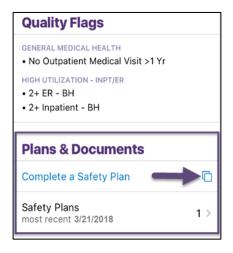


Figure 20. Complete a safety plan

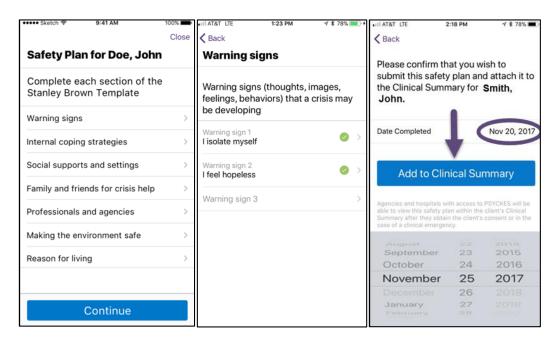


Figure 21. Completing Stanley-Brown safety plan template

#### Screenings & Assessments

In this section, users can review results and complete new screenings and assessments. The following screenings and assessments are available within a client's Clinical Summary:

- Columbia Suicide Severity Rating Scale (C-SSRS)
- Patient Health Questionnaire (PHQ-9) depression questionnaire

Results of the screenings and assessments completed on the mobile app will be added to the client's Clinical Summary and will be viewable for any PSYCKES user working with that client (with consent or in an emergency).

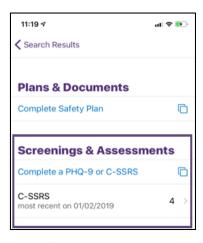


Figure 22. View or complete assessment

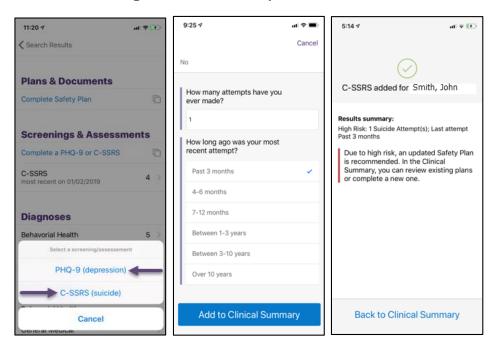


Figure 23. Completing a C-SSRS assessment and adding to Clinical Summary

#### **Diagnoses**

Diagnostic information in the Clinical Summary is split into 2 sections:

- Behavioral Health
- General Medical

Each section lists the number of unique diagnoses on the right-hand side.

Tap on the Behavioral Health or General Medical sections, to view all primary and secondary diagnoses associated with any Medicaid claim submitted for the recipient in the past year.

Tap on the diagnosis to view provider invoices associated with the diagnosis, including the provider's name and date of service.

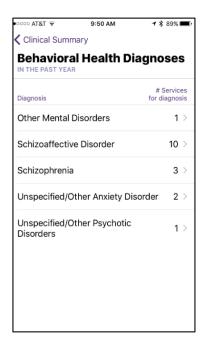


Figure 24. Clinical Summary: BH Diagnoses

#### Medications

Medication information in the Clinical Summary is split into 3 sections:

- Controlled Substances
- Behavioral Health
- General Medical

Tap on the medication section (for example Behavioral Health Medications) to view a list of medications that have been picked up within the past year, including information on drug class, date of last pick-up, and total days' supply of each medication in the past year.

Note: Pickup records in the past 45 days may not be available

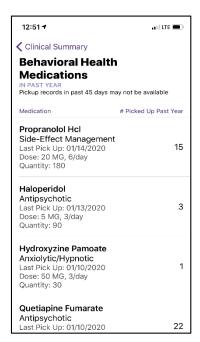


Figure 25. Clinical Summary: BH Medications

#### Services

The Clinical Summary provides information on the following services, if paid for by Medicaid in the past year:

- Outpatient Behavioral Health
- Outpatient Medical
- Hospital & ER (5 Years)
- Dental and Vision
- Living Support & Residential

- Laboratory & Pathology
- Radiology
- Medical Equipment
- Transportation

The numbers on the right are the number of services provided in the past year. Additionally, there is a "View All" option located at the top of the section that will display all services in chronological order.

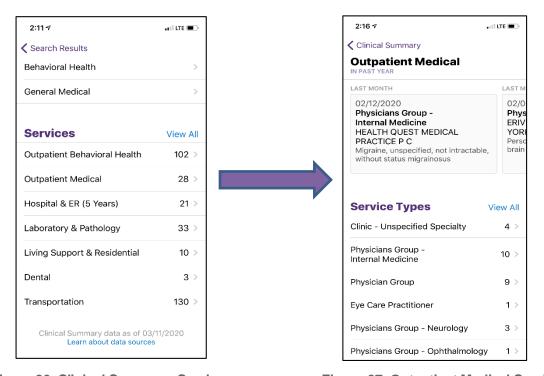


Figure 26. Clinical Summary: Services

Figure 27. Outpatient Medical Services

Tap on the service category to view information on the specific services provided, including date(s) of service, provider name, and diagnosis given at time of service.

**Note:** If the client you are viewing has not signed a consent, and this is not an emergency, the Hospital & ER data will combine Mental Health and Substance Use services into one Behavioral Health category

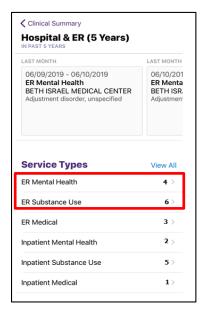


Figure 28. Clinical Summary with Consent or Emergency: ER Mental Health & Substance Use Service Types

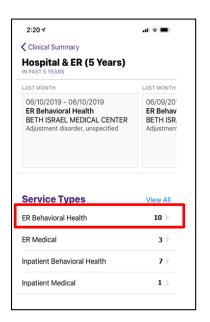


Figure 29. Clinical Summary without Consent or Emergency: ER Behavioral Health Service Type

#### What are Special Protections for PHI?

Client-level data is available to provider agency users when clients they serve are positive for a quality flag, with client consent, or in a clinical emergency. Certain categories of protected health information (PHI) are subject to additional special protections.

Information with special protections include:

- Substance use
- HIV
- Family planning
- Genetic information

#### How to get access to PHI with special protections

PHI with special protections will be displayed in PSYCKES when the client signs:

- 1. PSYCKES Consent Form or:
- 2. Behavioral Health Care Collaborative (BHCC) Patient Information Sharing Consent Form or;
- 3. Department of Health Adult Health Home Patient Information Sharing Consent (DOH-5055)

The other instance in which PHI with special protections will be displayed is if:

1. Agency attests to a clinical emergency (Clinical Summary is available for 72 hours in a clinical emergency).

Consenting clients allows providers to view Medicaid recipients who are not positive for a quality flag and/or have data with special protections, as well as for those recipients who are not associated with a provider through Medicaid billing.

To consent a client, the user will need the client to sign consent. A PSYCKES consent form that is pre-populated with your agency's information can be printed from the Registrar Menu of the PSYCKES application. Currently, only English and Spanish PSYCKES consent forms are available within the application.

The PSYCKES consent form is also available as a blank PDF on the PSYCKES website in the following languages:

- English
- Spanish
- Arabic
- Chinese
- Haitian
- Creole

- Japanese
- Khmer
- Korean
- Russian
- Urdu

**Note:** Users with state level access and users from Managed Care Organizations will see all available data, including data with special protections, without client consent.

#### **How to Enable PHI Access**

If a client is found in PSYCKES and has not yet been linked to the user's agency via Medicaid billing or with consent or emergency access, the Search Results page will allow the user to "Enable PHI Access" by completing a four-step process to attesting to the organization's right to access the client's clinical summary.

#### Step 1: Search for client in the entire PSYCKES database

- a) Enter Medicaid ID or SSN in Search box.
- b) Confirm the data matches the intended client
  - If data does not match intended client, return to Search Results
  - If data matches intended client, tap "Enable PHI Access."

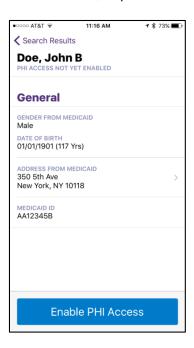


Figure 30. Search Results

# Step 2: Select reason for having a right to access the client's Medicaid data

If the *client signed consent*, select:

a. Client signed the PSYCKES consent form – With signed consent, PSYCKES users at the agency will have access to all available Clinical Summary data for three years after the consent was entered, or three years after the last Medicaid claim from the agency has been processed by the New York State Medicaid Program, whichever is later.

- PSYCKES consent forms can be found/printed from the desktop version of PSYCKES, under the Registrar Menu
- b. Client signed the BHCC consent form With signed consent, all clinical level data including PHI with special protections will be viewable. Data will be available to both the provider/agency that entered this BHCC consent as well as the selected BHCC/IPA Network until the day the client withdraws consent, or until three years after the last date the client received services from the agency, whichever comes first.
- c. Client signed the DOH-5055 consent form With signed consent, users at the agency will have access to all client level data according to their User Role Survey. The user types that will have access to the data are Care Management and Health Home Administration. This access will remain in effect until the day the client withdraws DOH-5055 consent, or until the client is no longer enrolled in that Health Home, whichever comes first.

In the absence of signed consent, select:

- a. **This is a clinical emergency** Selecting this will give user the ability to view the client's data for 72 hours.
- b. Client is currently served by or being transferred to my agency Selecting this will give user the ability to view a client's Clinical Summary data if the client has an active quality flag and it will not provide access to data with special protections (HIV, substance use information, family planning, genetic testing). The data will be available to PSYCKES users at the agency for 9 months.

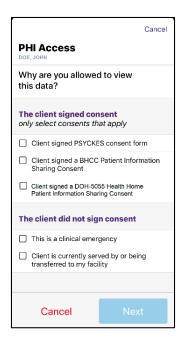


Figure 31. Reason for viewing data

## Step 3: Indicate the way in which the client's identity has been verified and submit

Attest to client identity via the following:

- Select "Provider attests to client identity," if you or someone at your agency has experience with the client and hit 'Next' or;
- Select "Client presented 1 photo ID" OR "Client presented 2 forms of nonphoto ID" and hit 'Next.' The user will be prompted to select the form(s) of identification from an approved list.



Figure 32. Confirming client's identity

#### Step 4: Enable access

Depending on the reason you selected as your right to view a client's Clinical Summary, the "Enable" page will display a message. For example, if the client has signed the PSYCKES consent form this is the message that will be displayed:

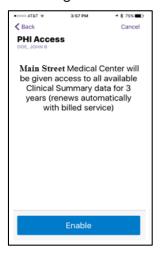


Figure 33. Enable PHI Access for PSYCKES consent

#### **Change PHI Access**

At the top of a recipient's Clinical Summary, you can see what type of PHI Access your agency has for an individual.

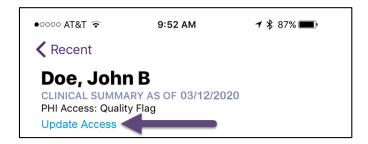


Figure 34. Clinical Summary: PHI Access: Quality Flag - Updating PHI Access

If you wish to update the access you currently have for a recipient, such as wanting the recipient's full data (including data with special protection) it can be changed by selecting "Update Access."

Follow Steps 1-4 listed above in the "How to Enable PHI Access" section. Once you have enabled the access you selected, you'll see the change reflected in the recipient's Clinical Summary:

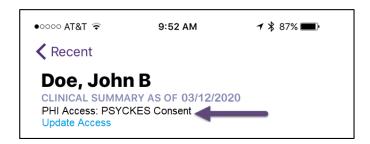


Fig 35. Clinical Summary: PHI Access: PSYCKES Consent

#### Withdrawing Consent

A client who has granted PSYCKES consent may withdraw consent at any time by signing the PSYCKES Withdrawal of Consent form. Users would need to:

- a. Print the Withdrawal of Consent from the desktop version of PSYCKES (or have pre-printed copies handy)
- b. Go to the desktop version of PSYCKES in the Registrar Menu to "withdrawal of consent"

**Note**: If a user accidentally consents a client, they need to immediately withdraw consent in the desktop version. If the user is unable to access a desktop, they should contact the PSYCKES Helpdesk immediately at psyckes-help@omh.ny.gov.

#### **Logging Off**

When a user has finished using the PSYCKES mobile app, it is important to log off. In order to log off, the user will need to navigate to the Settings icon on the bottom right-hand side of their screen.



Figure 36. Settings icon

Within the Settings page, the user can view the following:

- a. The User ID they are logged in as
- b. The agency they are associated with in PSYCKES
- c. De-identify (see below)

In order to log out, the user will need to select "Log Out" at the top right-hand side of their screen. Once the user has logged out, they will be brought back to the log in screen.

#### **De-identify**

This feature allows users to scramble client identifying information within the mobile app (name, date of birth, Medicaid ID, address.)



Figure 37. Settings: Log Out & De-identify

#### **Timing Out**

The PSYCKES mobile app has a "timed out" feature that will log users out if the screen has been idle for more than 15 minutes. This is to ensure the security of personal and sensitive client information.

#### **Screenshots Prohibited**

Security of recipients' sensitive and personal information is of the upmost importance in PSYCKES. Due to this emphasis on security, users are prohibited from taking screenshots while using the PSYCKES mobile app. If a user attempts to take a screenshot, they will receive a message instructing them to go into their iOS device's photos and remove the screenshot.

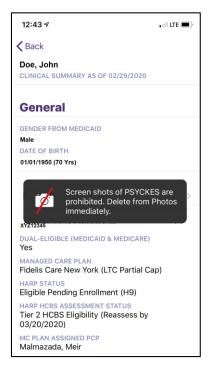


Figure 38. "Screenshot prohibited" message

#### **Updates to PSYCKES mobile app**

The PSYCKES application is continually evolving and so will the mobile app. There are two kinds of updates that can occur with the PSYCKES mobile app:

- iOS software update
- PSYCKES app version update

Users will receive automatic update messages when it is necessary to bring the iOS software and/or PSYCKES mobile app up to date. These messages will include instructions on how to update.



Figure 39. "Software Update Required" message