

User Name: _____

Date: _____

All Users:

User Skill

Required Steps / Answer Key

Login to PSYCKES

Open PSYCKES website; navigate to login screen; enter unique OMH User Identification (ID) and security token passcode.

Exit PSYCKES

Click "Log Off", do not simply close browser.

Clinicians:

User Skill

Required Steps / Answer Key

Search for a client in Recipient Search

Click "Recipient Search" tab; enter Medicaid ID#, Social Security Number (SSN) or Client name. If searching by name, may need to add criteria such as Date of Birth (DOB) to narrow the results. If desired, change "Current Access" filter option; run the search; view/sort the results.

Access a Clinical Summary from search results

Click on client's name.

Set Clinical Summary time period, and read message re: data with special protections

- Explain: What data has special protections? Is it hidden or shown in the summary you are viewing?

Click on desired time period; read message about data with special protections; correctly identify what data has special protections and whether it is shown in the Clinical Summary.

Use Integrated Graph to review services over time, and view desired details

- Does the client appear to be engaged in outpatient MH treatment?

Zoom in on specific time period; hover cursor over dot on graph to see details.

Find desired information in the Clinical Summary

- What quality flags (if any) does client have?
- Where and when was the client's most recent mental health outpatient visit?
- What (if any) are the client's current active medications (behavioral and/or medical)?
- What can you learn about labs and diagnostic testing?

- Be familiar with the sections of the Clinical summary
- Be aware of which sections are broken out into Behavioral Health vs. Medical, and which are integrated
- Understand what the quality flags mean
- Be aware of what information is and is not available (e.g., labs and diagnostic tests are shown, but not results).

"Drill down" to find details of items in the summary (medications and services)

- Does the client appear to be adhering to medication regimen?

Click "see detail" icon for at least one medication and one service; for medication detail, switch between trials and orders.

Print the Clinical Summary (and print details, if desired)

Click the PDF icon to export; select "all" or selected sections and click "export"; click "open" (select "save" only if necessary and **only** to a secure server); print document.

Registrar Menu Users

User Skill

Required Steps / Answer Key

Access Registrar menu

Click "Registrar Menu" tab.

Enter in the Enable PHI Access Menu that your institution has the right to access a client's data due to a signed consent, a clinical emergency, or attestation of providing services to the client

Click "Manage PHI Access" Registrar submenu tab; click "Search & Enable Access"; enter Medicaid ID#, Social Security Number (SSN), or Client name. If searching by name, may need to add criteria such as Date of Birth (DOB) to narrow the results; confirm client match and click "Change PHI Access Level" link on rightmost column; select the reason for access to client data (signed consent, emergency, or attestation of service); select how client's identity was verified (known to staff or specify form of ID); submit/quit or submit/ proceed to clinical summary.

Print PSYCKES consent form

Click "Manage PHI Access" Registrar submenu tab; click desired form; click "open" (or "save" – it is okay to save blank consent); print document.

To enter information to populate in consent form, click "Add/Edit Details" of the Provider Details for Consent Form section in "Manage PHI Access" Registrar submenu tab. Enter relevant information.