NEW YORK STATE OF OPPORTUNITY. | Office of Mental Health

Brief Instructions for Using PSYCKES-Medicaid in Clinical Setting

Table of Contents

Scenario #1: Using the Enable PHI Access menu to enter consent and access client data

- You have the client's Medicaid ID, Social Security #, Name, or Date of Birth
- You have a form of identification or you can attest to client's identity
- The client has signed a PSYCKES Consent Form or it is a clinical emergency or you wish to attest the client is being served / transferred to you (prior to billing / consent)

Overview:

- Enter Enable PHI Access Menu
- Document client's identity and why you have the right to access
- Proceed to client's Clinical Summary

Click Path:

❶ Login to PSYCKES

➔ My QI Report screen appears

❷ Top row of tabs: Hover mouse over "Registrar", click "Manage PHI Access" submenu

❸ Click link: "Search & Enable Access" under Enable PHI Access section

➔ "Step 1" screen appears

❹ Enter Medicaid ID, Social Security #, Name, or Date of Birth

❺ Click "Search" button

➔ Search results appear

❻ Confirm client match and select "Change PHI Access Level" on rightmost column

➔ "Step 2 & 3" appear at the bottom of the screen

❼ Step 2: Check box to select reason for access to Medicaid data

➔ (Signed consent, emergency status, or attestation that client is being served)

❽ Step 3: Indicate how client was identified:

➔ Check box to attest to identity or
➔ Select forms of ID in each drop-down list

❾ Bottom row of buttons: click "Submit and View client's Clinical Summary"

➔ Client's Clinical Summary loads

For instructions on working with Clinical Summary, please see page 5.

Scenario #2: Using Recipient Search to find consented client and access data

- You have verified the client's identity
- You want to check if this client has already been consented at your agency. If so, you want to access the client's clinical summary

Overview:

- Enter Recipient Search
- View consented clients
- Look for your client
- Proceed to clinical summary

Click Path:

❶ Login to PSYCKES

➔ My QI Report screen appears

❷ Top row of tabs: click "Recipient Search"

➔ "Recipient Search" screen appears

❸ Locate the filter called "Current Access" on right side of screen

➔ Select "Active Consent" from the drop-down list

❹ Type client Medicaid ID, Social Security #, Name in appropriate box

❺ Optional, if searching by name and client has a common name:

Increase number of rows to display by using "Limit results to" filter at bottom right

❻ Click "Search" button at lower right

➔ Please be patient as PSYCKES may take time to load
➔ Search results appear: list of clients

❼ Look for your client on the list

If your client's name appears:

Review name, DOB and gender to verify client's identity

Click client's name

➔ Client's Clinical Summary loads

If your client's name does not appear:

Proceed to Scenario #1

For instructions on working with Clinical Summary, please see page 5.

Scenario #3: Using Recipient Search to find client's Medicaid ID#

- You ***do not*** have the client's Medicaid ID# ***or*** Social Security #
- You have checked your provider agency's list of consented clients (see scenario #2), and the client's name ***does not*** appear
- You have forms of identification ***or*** you can attest to client's identity

Overview:

- Use Recipient Search to check if client appears in the list of clients linked to your provider agency through Medicaid claim in the past 12 months
- Look up client's Medicaid ID #
- Proceed to Scenario #1

Click Path:

❶ Login to PSYCKES

➔ My QI Report screen appears

❷ Top row of tabs: click "Recipient Search"

➔ "Recipient Search" screen appears

❸ Type Client Name in appropriate box. Optional, if client has a common name:

Narrow search by entering DOB or

Increase number of rows to display by using "Limit results to" filter at bottom right

❹ Click "Search" button at lower right

➔ Please be patient as PSYCKES may take time to load
➔ Search results appear: list of clients

Note: this list includes clients in the Medicaid behavioral health population who have had a Medicaid billed service anywhere at your provider agency within the past 12 months. It does ***not*** include clients linked to your provider agency ***only*** through the Enable PHI Access Menu.

❺ Look for your client on the list

If your client's name appears:

Review name, DOB, and gender to verify client's identity

Copy Medicaid ID#

Note: If your client is flagged for a quality concern in PSYCKES, you will be able to click the client's name in this list to view the clinical summary. However, if the client has not been consented, no data with special protections (HIV, Substance Abuse, Genetic, Family Planning) will be included.

Tip: Viewing and printing the Clinical Summary

- Access the Clinical Summary through the Registrar: Enable PHI Access Menu (see Scenario #1) or through Recipient Search (see Scenario #2)
  - ➔ Clinical Summary loads
- Click desired time period for summary
  - ➔ Page refreshes

❶ *Review Client Data*

For additional information, click “Details” at top of any section or to the right of any entry

➔ “Details” window opens

❷ *Print Full Clinical Summary*

At upper right, click PDF icon

➔ “Export to PDF” window opens

(Note: leave default setting: “All sections – Summary data”)

In “Export to PDF” window, click “Export” button

➔ “File Download” window opens

Click “Open” button

➔ PDF file opens

Print PDF file

❸ *Optional: Print Detail of Specific Section*

At upper right, click PDF icon

➔ “Export to PDF” window opens

In “Export to PDF” window, select bubble labeled “Selected section(s) – Summary data” or “Selected section(s) – All available data”

In “Export to PDF” window, select the sections of the Clinical Summary you wish to print from the list; hold the “Ctrl” key on your keyboard to select multiple sections

In “Export to PDF” window, click “Export” button

➔ “File Download” window opens

Click “Open” button

➔ PDF file opens

Print PDF file

❹ *Optional: Save PDF Files*

If desired, save PDF files ***only*** to a secure server, never to portable media.

Reminder: To maintain confidentiality of patient information, please remember to log off PSYCKES.