PSYCKES-Medicaid

Registrar Menu

User's Guide

NEW YORK STATE OF OPPORTUNITY. | **Office of Mental Health**

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PSYCKES Registrar Menu

Overview

PSYCKES users can automatically view client-level Medicaid data of clients for whom the user's provider agency billed Medicaid and who are positive for a quality flag. This is due to a federal mandate to monitor the quality of care for Medicaid clients. Certain categories of protected health information (PHI) – including data associated with HIV, substance use, family planning, and genetic information – are legally subject to additional special protection and will not be displayed in PSYCKES without client consent. The New York State Office of Mental Health (OMH) developed the Enable PHI Access feature in PSYCKES to allow provider agencies to obtain consent from clients for expanded access to their Medicaid data. The Enable PHI Access feature allows providers to view the Clinical Summary of 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.

Registrar Menu: Enable PHI Access

One way to access the Enable PHI Access feature is through the "Registrar Menu" in PSYCKES and it can be used to attest:

1. Client has granted consent for staff at the agency to access PHI;
2. PHI is being disclosed due to a clinical emergency or;
3. Client is being served by or transferred to the agency.

The "Registrar Menu" can also be used to register a client's withdrawal of consent in PSYCKES, if the client chooses to withdraw their consent and signs the PSYCKES withdrawal of consent form.

The second way to access the Enable PHI Access feature is through a recipient identifier search in "Recipient Search". See the *PSYCKES-Medicaid Recipient Search User's Guide* for more details.

Implementation Strategies

Use the document called *Using PSYCKES for Clinical Purposes: Guidelines for Policies and Procedures* as a tool to assist in implementing the consent process. Example implementation strategies:

- **Identify** staff that will obtain consent from clients.
- **Create** procedures for the consent process.
- **Customize** PSYCKES consent form with agency's information.

Accessing client data in PSYCKES: Comparison

Client data-agency link type	Client data access type	Quality flag?	Any client data?	Data with special protection? (SUD, HIV, Family Planning, Genetic)	Duration
Automatic	**Billed service in past 9 months**	No	No, client name only	No	9 months after last service
		Yes	Yes	No	While flag is active, up to 9 months after last service
Manual	**Attest client is being served at / transferred to agency**	No	No, client name only	No	9 months after last service
		Yes	Yes	No	While flag is active, up to 9 months after last service
	Clinical Emergency	n/a	Yes	Yes, all data	72 hours
	Consent	n/a	Yes	Yes, all data	3 years after last service

There are two ways that clients are assigned to a PSYCKES user at a provider agency:

❶Automatically, because **client received a billed service in the past nine months:**
If the client has an active quality flag, user can view clinical data but NOT data with special protections. The duration is as long as both the flag remains active and the client has been served by the agency within the past nine months.

❷Manually, because a PSYCKES user at the agency attests:

- **Client is being served at / transferred to agency:** User can view clinical data, but NOT data with special protections. The duration is as long as both the flag remains active and the client has been served by the agency within the past nine months.
  Note: This option can be used for clients in which consent has not yet been obtained and / or clients that are new to the agency. For new clients being transferred to the agency, but the agency has not billed a service for them – staff could use this option to view the clients' Clinical Summary ahead of time.
- **Client is experiencing a clinical emergency:** User can view all clinical data, including data with special protections, regardless of quality flag status. Access expires after 72 hours.
- **Client signed consent:** User can view all clinical data, including data with special protections, regardless of quality flag status, for up to three years from the last date of service billed to Medicaid.

Obtaining consent from clients

Clients for whom consent is required typically include:

- New admissions that are being served by the user's agency for the first time but have previously received Medicaid services at any agency;
- Clients with a quality concern who potentially have data with special protections;
- Clients served by the user's agency who are not flagged with a quality concern and;
- Clients being transferred to the user's agency.

PSYCKES Consent Form

The PSYCKES consent form:

- **Describes** the type of clinical information that will be available to the provider, including PHI with special protections.
- **Explains** that once consent is granted, information on services that occurred before or after the date of consent will be viewable in PSYCKES.
- **Remains in effect** 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.

It is recommended that the PSYCKES consent form is set up ahead of time and multiple printed copies are available to have on hand for obtaining client consent.

The following steps detail how to set up and print the PSYCKES consent form using the Registrar Menu in PSYCKES and how to obtain signed consent from clients:

A. Set up PSYCKES Consent Form

Set up the PSYCKES consent form ahead of time to include specific information about the agency within the consent form:

❶ Login to PSYCKES

❷ Hover mouse over the "Registrar Menu"

❸ Click on "Manage PHI Access" menu

❹ Click on "Add/Edit Details" for Provider Details for Consent form.

> *Note*: The "Name of Provider" will be pre-populated with the agency's name.
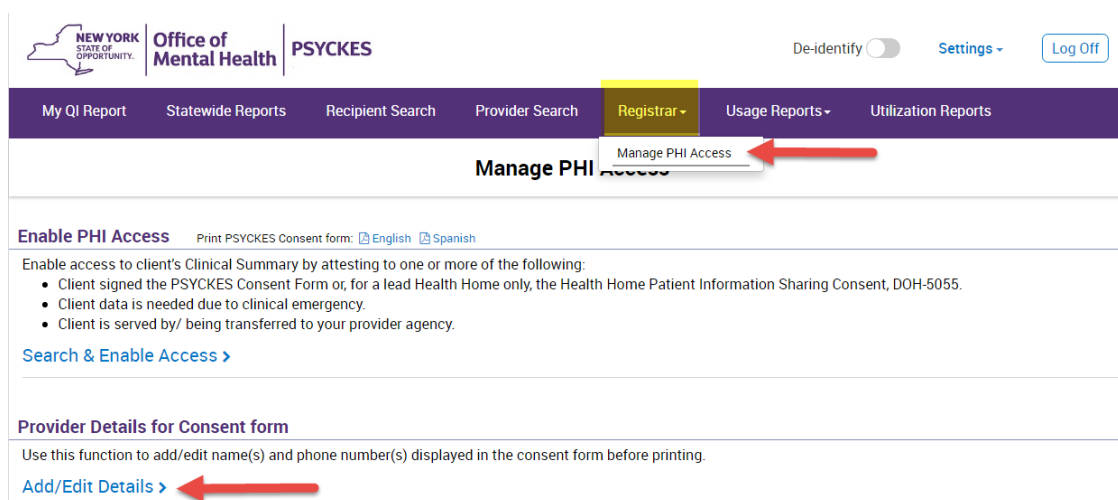
Figure 1. Registrar Menu: Administration

❺ Fill in the blank fields so that the relevant contact information below can be populated into the PSYCKES consent form:

- Name (or title) and phone number of staff member to which clients can report suspected improper use of PSYCKES PHI
- Name (or title) and phone number of staff member clients can contact to obtain the PSYCKES Withdrawal of Consent form
- Name (or title) of staff member to which clients can give the signed PSYCKES Withdrawal of Consent form

❻ Click "Submit"

Note: The information entered in the Administration menu will automatically populate on all PSYCKES consent forms printed by any PSYCKES user at the agency. The information can be edited at any time by returning to the Administration menu.

Figure 2. Registrar Menu: Provider Details

B. Print PSYCKES Consent Form

Print the consent form via the Registrar Menu in PSYCKES:

❶ Hover mouse over the "Registrar Menu" and select "Manage PHI Access"

❷ Where it says "Print PSYCKES Consent form", select language of consent form to be printed (English Version or Spanish Version).

❸ Print consent form PDF (click File → Print).
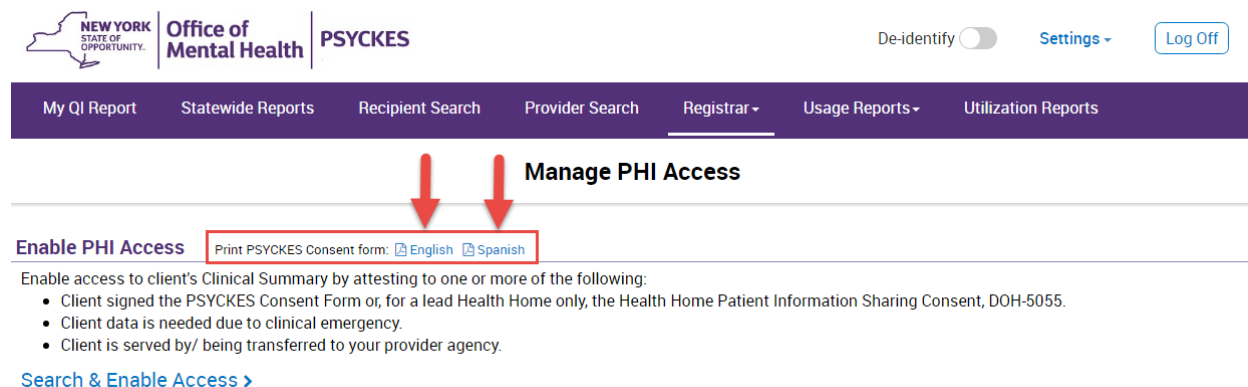
Figure 3. Registrar Menu: Print PSYCKES Consent Form

C. Client Signs PSYCKES Consent Form

The appropriate time client consent is obtained should be decided:

- Include PSYCKES consent form in intake package, along with other forms or;
- Clinician can explain PSYCKES during a session with client and request consent.

On the consent form, the client can grant (or deny) consent for an agency to access all electronic health information through PSYCKES in connection with providing health care services.

D. File PSYCKES Consent Form

Offer a copy of the signed PSYCKES consent form to the client and file the original consent form in the client's chart (paper chart or Electronic Medical Record (EMR)).

Manually attest right to access client data

A PSYCKES user may enable access to client-level data by manually attesting to the right to access client data (via way of consent, clinical emergency, or attestation of service). The attestation is entered via the "Registrar Menu" or "Recipient Search" of the PSYCKES application.

Enable PHI access via the Registrar Menu

The following steps detail how to attest to the right to access client-level data using the Registrar Menu:

❶ Login to PSYCKES.

❷ Hover mouse over "Registrar Menu".

❸ Click on "Manage PHI Access" menu.

❹ Click "Enable access to client's Clinical Summary".
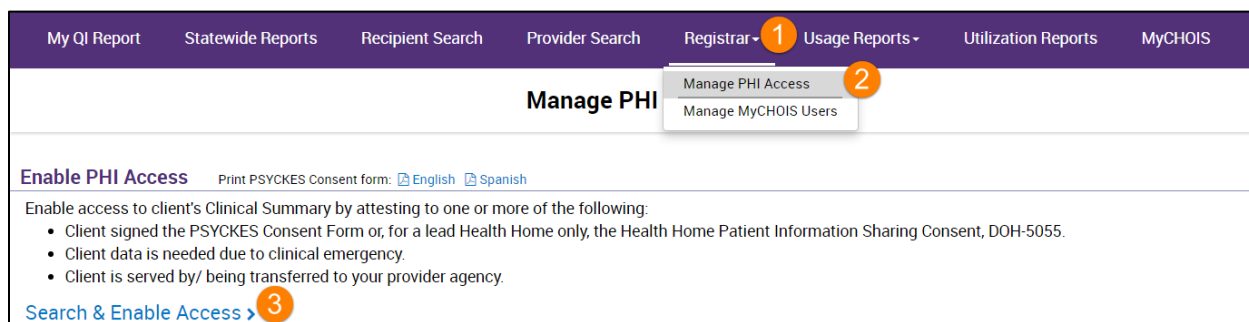
Figure 4. Registrar Menu: Manage PHI Access: Enable PHI Access

Note: The Enable PHI Access feature can also be accessed via "Recipient Search". See the *PSYCKES-Medicaid Recipient Search User's Guide* for more details.

❺ Follow Steps 1 – 3 on the screen to look up client, attest to right to access data, and verify identity.

Step 1: Search for client in the entire PSYCKES database

    a) Enter any combination of the below recipient identifiers and click Search:
- Medicaid ID
- SSN
- First Name – *at least first two characters required, if entered*
- Last Name – *full last name required, if entered*
- DOB – *enter to improve search results when searching with name*

    b) Click "Search". Search results will appear.

    c) Confirm recipient match, and click "Change PHI Access Level" link on the rightmost column.
Note: If search yields more than 10 recipients, a message will appear indicating that there are too many recipients matching search criteria, along with a list of strategies to narrow search results.

Figure 5. Registrar Menu: Enable PHI Access – Step 1

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

- If the *client signed consent*, select:
  - **Client signed the PSYCKES consent form for [*provider agency name*]. Note: (For a lead Health Home only, the Health Home Patient Information Sharing Consent form, DOH-5055)** – 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.
- In the *absence of signed consent*, select all that apply:
  - **Attestation of Clinical Emergency by [*provider agency name*]** – Checking this box will only give the user the ability to view the client's

data for 72 hours. Users are allowed to print the client's Clinical Summary during this time and place it in the client's chart.

o **Attestation of Service: Client is currently served by / being transferred to [*provider agency name*]** – Checking this box will only give the 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 three years from the last date of service billed to Medicaid.

Attestation for right to access client's Medicaid data (Select at least one option):

1.   ☐ Client signed the PSYCKES Consent Form for **BEHAVIORAL HEALTH PROVIDER AGENCY**
         Note: For a lead Health Home only, the Health Home Patient Information Sharing Consent, DOH-5055 may be used.   ❷

2.   In the absence of signed consent, you may get limited access to client's clinical data.   ❷
      Please check all that apply:

      ☐ a. Attestation of Clinical Emergency by **BEHAVIORAL HEALTH PROVIDER AGENCY**

      ☐ b. Attestation of Service: Client is currently served by/ being transferred to **BEHAVIORAL HEALTH PROVIDER AGENCY**

Figure 6. Registrar Menu: Enable PHI Access – Step 2

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

a) Attest client has been identified via the following:
  - Check the box next to "Service provider attests to client identity," if you or someone at your agency has experience with the client or;
  - Select the types of identification presented by the client from the two drop-down lists (shown below).

b) Complete the process of enabling PHI access by clicking one of the following buttons:
  - Click **"Submit and go to client's Clinical Summary"** to complete the process of enabling access to client's Clinical Summary to all users at your agency and proceed to the client's Clinical Summary;
  - Click **"Submit and quit"** to complete the process of enabling access to client's Clinical Summary to all users at your agency and return to the main PHI Access menu or;
  - Click **"Quit and do not submit"** to cancel the process of enabling access to that client's data and return to the main PHI Access menu.

Figure 7. Registrar Menu: Enable PHI Access – Step 3

Figure 8. Registrar Menu: Enable PHI Access – Types of Client Identification

Withdrawal of PSYCKES consent

A client who has granted PSYCKES consent may withdraw consent at any time by signing the PSYCKES Withdrawal of Consent form. A PSYCKES user must revoke the consent using the Registrar Menu in PSYCKES. Withdrawal of consent revokes an agency's ability to view a consented client's Medicaid data. However, if the client who withdrew consent is flagged in PSYCKES for a quality concern, some data for that client will still be accessible in PSYCKES, with the exception of data with special protections (HIV, substance use information, family planning, genetic testing).

Note: Provider agencies that accessed a client's PSYCKES information while the consent was in effect may include the information in the client's medical record. Even if the client decides to withdraw consent, agencies are not required to return the PSYCKES information accessed while the consent was in effect nor are they required to remove the information from their records. Consent may be reinstated by having the client sign a new PSYCKES consent form and having a PSYCKES user complete the steps to enable PHI access.

The following steps detail how to use the Registrar Menu to print the PSYCKES Withdrawal of Consent form and revoke client consent:

A. Print the PSYCKES Withdrawal of Consent Form

❶ Hover mouse over the "Registrar Menu" in PSYCKES

❷ Select "Manage PHI Access"

❸ Where it says "Print Withdrawal of Consent form," select language of withdrawal of consent form to be printed (English Version or Spanish Version)

❹ Choose "Open" for withdrawal of consent form to open in PDF format

❺ Print withdrawal of consent form PDF (click File → Print)

Figure 9. Registrar Menu: Print PSYCKES Withdrawal of Consent Form

B. Client Signs PSYCKES Withdrawal of Consent Form

C. File PSYCKES Withdrawal of Consent Form

Offer a copy of the signed PSYCKES withdrawal of consent form to the client and file the original consent form in the client's chart (paper chart or EMR).

D. Revoke PSYCKES Consent

a) Login to PSYCKES
b) Hover mouse over "Registrar Menu"
c) Click on "Manage PHI Access" menu
d) Click "Search & Withdraw Consent " to disable access to client data
e) Enter the client's Medicaid ID in the box provided and click "Search"
f) Client's demographic information will appear; confirm the client found is the client that signed the withdrawal of consent form
g) Click "Withdraw" and a message box will appear asking you to confirm you wish to withdraw consent; click "OK" to proceed and a confirmation message that consent has been withdrawn will be displayed on the next screen

Figure 10. Registrar Menu: PHI Access Withdrawal of Consent

Figure 11. Registrar Menu: PSYCKES Withdrawal of Consent Procedures

Search clients with active PSYCKES consent

The Recipient Search menu allows users to look up clients that have an active consent in PSYCKES. To view this list, follow these steps:

❶ Login to PSYCKES

❷ Click on "Recipient Search" menu

❸ Within the "Services by a Specific Provider" search box, locate the "Current Access Status" drop-down filter

❹ From the drop-down list, select "Active Consent"

❺ Click "Search" in the bottom right hand corner

Note: The Recipient Search function defaults to display 50 recipients for each search. To view more names, select a larger number in the "Maximum No. of Rows to be displayed" drop-down filter before clicking "Search".

Figure 12. Recipient Search: Current Access Status Filter