NEW YORK STATE OF OPPORTUNITY. | Office of Mental Health

Brief Instructions for Using

PSYCKES-Medicaid

in Clinical Setting

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Scenario #1: Using the PHI Access Module to Enter Consent and Access Data

- You have the client's Medicaid ID# or Social Security#
- You have 2 forms 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 PHI Access Module
- Document client's identity and why you have the right to access
- Proceed to client's Clinical Summary

Click Path:

❶ Log in to PSYCKES

➔ My QI Report – Quality Indicator Overview Screen appears

❷ Top row of tabs: click "Registrar Menu"

➔ "PHI Access" menu screen appears

❸ Click link: "Enable access to client's Clinical Summary"

➔ "Step 1" screen appears

❹ Enter Medicaid ID# or Social Security# (and select appropriate bubble)

❺ Click "Search" button

➔ Client demographic fields populate

❻ Bottom row of buttons: if this is the right person, click "Yes, continue to Step 2"

➔ "Step 2 & 3" screen appears

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 2 forms of ID, one in each drop-down box.

❾ Bottom row of buttons: click "Submit and go to clinical report."

➔ Client's Clinical Summary loads

For instructions on working with Clinical Summary, please see page 4.

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 facility
- If so, you want to access the client's clinical summary

Overview:

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

Click Path:

❶ Log in to PSYCKES

➔ My QI Report – Quality Indicator Overview Screen appears

❷ Top row of tabs: click "Recipient Search"

➔ "Recipient Search" screen appears

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

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

❹ Type Recipient Last Name or Medicaid ID# or SS# in appropriate box

❺ Optional: if searching by name and client has a common name, increase number of rows to display by selecting number from drop-down menu 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:

If you have the client's Medicaid ID# or SS#, proceed to Scenario #1, or

If you do not have the client's Medicaid ID#, proceed to Scenario #3

For instructions on working with Clinical Summary, please see page 4.

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 facility's list of consented recipients (see scenario #2), and the client's name ***does not*** appear
- You have 2 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 facility through Medicaid claims in the past 12 months
- Look up client's Medicaid ID #
- Proceed to Scenario #1

Click Path:

❶ Log in to PSYCKES

➔ My QI Report – Quality Indicator Overview Screen appears

❷ Top row of tabs: click "Recipient Search"

➔ "Recipient Search" screen appears

❸ Type Recipient Last Name in appropriate box

Optional -- if client has a common name,

Narrow search by selecting age range from drop-down list and/or

Increase number of rows to display by selecting from drop-down 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 service anywhere in your facility within the past 12 months that was billed to Medicaid. It does ***not*** include clients linked to your facility ***only*** through the PHI Access Module.

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 tracked by 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, and Family Planning – if applicable) will be included.

Tip: Viewing and Printing the Clinical Summary

- Access the Clinical Summary through the PHI Access Module (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 “See All Service Details” at top of any section or to the right of any entry

➔ “Details” window opens

❷ Print Full Clinical Summary

At upper right, go to “Export” and click PDF icon

➔ “Export Options” window opens

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

In “Export Options” 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, go to “Export” and click PDF icon

➔ “Export Options” window opens

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

In “Export Options” 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 Options” 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: In order to maintain confidentiality of patient information, please remember to log off PSYCKES! Thank you.