



**Office of  
Mental Health**

# Using PSYCKES Recipient Search

**We will begin shortly**

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# Q&A via WebEx

- All phone lines are muted
- Access “Q&A” box in WebEx menu at the right of your screen; if you expanded the view of the webinar to full screen, hover cursor over green bar at top of screen to see menu
- Type questions using the “Q&A” feature
  - Submit to “all panelists” (default)
  - Please do not use Chat function for Q&A
- Slides will be emailed to attendees after the webinar

# Agenda

- PSYCKES-Medicaid Overview
- Access to Client-Level Data
- Recipient Search
  - Individual & Group Searches
  - And / Or Logic
  - Bulk Population Management Views
  - Example Searches
- Streamlined Consent in Recipient Search
- Training and Technical Assistance
- Question & Answer

# PSYCKES-Medicaid Overview

# What is PSYCKES?

- A secure, HIPAA-compliant web-based platform for sharing Medicaid claims and encounter data and other state administrative data
- Designed to support clinical decision-making and quality improvement
- Ongoing updates
  - Bulk Population Management Views in Recipient Search
  - Overdose Risk: Concurrent Opioid & Benzodiazepine Alert
  - Children's Waiver Status Filter
  - PSYCKES Consent Form: New design available & 10 languages

# Who is Viewable in PSYCKES?

- Over 8 million NYS Medicaid enrollees (currently or previously enrolled)
  - Fee for service claims
  - Managed care encounter data
  - Dual-eligible (Medicare/Medicaid): Medicaid data only
- Behavioral Health Population, i.e., at least one of the following:
  - Psychiatric or substance use service,
  - Psychiatric or substance use diagnosis, OR
  - Psychotropic medication
- Provides all data – general medical, behavioral health, residential

# What Data is Available in PSYCKES?

- Clinical Summary provides up to 5 years of data, updated weekly
- All Medicaid FFS claims and Managed Care encounter data, across treatment settings
  - Medications, medical and behavioral health outpatient and inpatient services, ER, care coordination, residential, etc.
  - Time lag varies from weeks to months, depending on how quickly providers bill and Managed Care plans submit to DOH
- “Real time” (0-7 day lag) data sources currently in PSYCKES:
  - MHARS, VistA, Meds Manager
  - CAIRS: ACT provider and contact information
  - TACT: AOT provider and contact information
  - MAPP: Health Home enrollment and CM provider information
  - NIMRS: Suicide attempt
  - Managed Care Enrollment Table: MC Plan & HARP status

# Quality Indicators “Flags”

- PSYCKES identifies clients flagged for quality concern in order to inform the treating provider and to support clinical review and quality improvement
- When a client has a quality flag, the provider is allowed access to that individual’s Clinical Summary
- Examples of current quality flags include:
  - Medication-Related, e.g., Polypharmacy, Low Adherence
  - Acute Care Utilization, e.g., High utilization, Readmission
  - General Medical, e.g., No Diabetes Screening on AP, No Outpatient Medical Visit > 1 year
  - Health and Recovery Plan (HARP), e.g. HARP Enrolled – No Assessment for HCBS

# PSYCKES Use Cases

## 1. Support Quality Improvement Projects

- Use My QI Reports to see report in real-time of clients flagged for specific quality indicators and drill down into Clinical Summary

## 2. Clinical Review and Decision-Making

- Look up individual Clinical Summaries of treatment and services
- Intake, evaluation, risk-assessment, and treatment planning for clients presenting to any provider (e.g., ERs, corrections)
- Case review by quality managers (e.g., state, county, or MCOs)

## 3. Identify cohorts of interest

- Use Recipient Search to perform flexible searches to answer a question about clients served in your agency/hospital
- Export search results list to PDF or Excel

# Access to Client-Level Data

# Access to Client Data in PSYCKES

Clients are assigned to agency/hospital in one of two ways:

- Automatically: Client had a billed service at the agency/hospital within the past 9 months
- Manually: Through Registrar Menu/ PHI Access Module
  - Signed consent
  - Emergency (72 hours)
  - Attest client is served by / being transferred to agency prior to billing and/or signed consent
- New: Recipient Search menu can be used to manually link clients to your agency/hospital, in addition to the Registrar Menu

# Access to Client Data Without Consent

- Certain data provided without consent...
  - Positive for any quality concern flagged in PSYCKES
  - At least one billed service anywhere in agency/hospital in past 9 months
- Rationale: monitor quality and safety of Medicaid program
- Does not include Protected Health Information (PHI) with special protections
  - Substance use information/treatment
  - HIV
  - Genetic testing
  - Reproductive / family planning

# Access to Client Data

## With Consent

- Expanded access
  - Search among all Medicaid enrollees in the Behavioral Health population, including those not yet linked to agency/hospital through Medicaid billing and those not positive for a quality flag
  - Includes information with special protections (substance use, HIV, genetic testing, family planning)
- Access to client-level data
  - With consent
  - In clinical emergencies (limited duration, 72 hours)
- Advantage of obtaining consent:
  - Access to data remains in effect until client is discharged (3 years after last bill) or client withdraws consent

# Choose PSYCKES Home Screen



My QI Report -

Statewide Reports

Recipient Search

Provider Search

Registrar -

Usage Reports -

Utilization Reports

### MAIN STREET CLINIC ⓘ

Quality Indicator Overview As Of 02/01/2020



PDF



Excel

REGION: ALL COUNTY: ALL SITE: ALL PROGRAM TYPE: ALL AGE: ALL MC PRODUCT LINE: ALL MANAGED CARE: ALL DS RIP PPS: ALL

Filters

Reset

Indicator Set

Indicator Set	Population	Eligible Population	# with QI Flag	%	Regional %	Statewide %	
BH QARR - DOH Performance Tracking Measure - as of 08/01/2019	All	188	118	62.77	65.66	64.44	
BH QARR - Improvement Measure	All	50	12	24	35.89	34.09	
General Medical Health	All	492	174	35.37	13.75	11.96	
Health and Recovery Plan (HARP)	Adult 21+	100	90	90	90.52	90.01	
High Utilization - Inpt/ER	All	493	161	32.66	26.95	23.66	
Polypharmacy	All	142	22	15.49	12.28	12.40	
Preventable Hospitalization	Adult	480	2	0.42	0.71	0.91	
Readmission Post-Discharge from any Hospital	All	135	14	10.37	11.42	11.48	
Substance Use Disorders - as of 08/01/2019	Adol & Adult (13+)	278	172	61.87	67.03	68.27	
Treatment Engagement	Adult 18-64	30	12	40	37.40	35.49	

# User Settings: Change My Home Page

The screenshot shows the PSYCKES user interface. At the top left is the logo for the New York State Office of Mental Health. The top right contains a 'De-identify' toggle, a 'Settings' dropdown menu (circled in red), and a 'Log Off' button. A red arrow points from the 'Settings' menu to a dropdown containing 'Change My Home Page' and 'Update My User Profile'. Below this is a dark navigation bar with links for 'My QI Report', 'Statewide Reports', 'Recipient Search', 'Provider Search', 'Registrar', and 'Usage Reports'. The main content area is titled 'Update My Home Page' and includes the text 'Changes will be reflected at next login'. It features five preview cards for 'My QI Report', 'Statewide Reports', 'Recipient Search', 'Provider Search', and 'Manage PHI Access'. A blue 'Save' button is located on the right side, with a red arrow pointing to it.

# Recipient Search: Overview

# Recipient Search Options

- Individual Search
  - Look up one person to view their Clinical Summary
  - Unique identifiers: Medicaid ID, SSN
  - First Name, Last Name, DOB
- Group Search
  - Flexible search to identify cohort of people served in your agency/hospital who meet specified criteria
  - Age Group, Quality Flag, AOT Status, HARP Status, MC Plan, history of suicide attempt, ideation, or self-harm
  - People taking psychotropic and non-psychotropic meds
  - People with specific behavioral health and medical diagnoses
  - People served in specific service setting in your agency/hospital or an outside agency/hospital, statewide (e.g., ACT, Health Home, Inpatient/ER, Clinic, etc.)

# Recipient Search: Individual or Cohort

My QI Report -

Statewide Reports

Recipient Search

Provider Search

Registrar -

Usage Reports -

Utilization Reports

## Recipient Search

Limit results to

50

Search

Reset

### Recipient Identifiers

Search in:  Full Database  MAIN STREET CLINIC

Medicaid ID

SSN

First Name

Last Name

DOB

AB00000A

000-00-0000

MM/DD/YYYY

### Characteristics as of 02/24/2020

Age Range  To  Gender

Population

High Need Population

AOT Status

Alerts & Incidents

Managed Care

MC Product Line

Medicaid Restrictions

DSRIP PPS

Children's Waiver Status

HARP Status

HARP HCBS Assessment Status

HARP HCBS Assessment Results

### Quality Flag as of 02/01/2020

[Definitions](#)

### Services: Specific Provider as of 02/01/2020

Past 1 Year

HARP Enrolled - Not Health Home Enrolled - (updated weekly)  
Antipsychotic Polypharmacy (2+ >90days) Children  
Antipsychotic Two Plus  
Antipsychotic Three Plus  
Antidepressant Two Plus - SC  
Antidepressant Three Plus  
Psychotropics Three Plus  
Psychotropics Four Plus  
Polypharmacy Summary  
Discontinuation - Antidepressant <12 weeks (MDE)  
Adherence - Mood Stabilizer (Bipolar)  
Adherence - Antipsychotic (Schz)  
Treatment Engagement - Summary  
No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (All)  
No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (Child)  
No Diabetes Monitoring (HbA1c and LDL-C) Diabetes and Schiz  
No Diabetes Screening (Gluc/HbA1c) Schz or Bipolar on Antipsychotic Adults  
No Diabetes Monitoring (HbA1c) Diabetes  
BH QARR - 2018 Quality Incentive Subset Summary  
BH QARR - 2018 Total Indicator Summary  
No Outpatient Medical Visit >1 Yr

Provider

Region  County

Current Access

Service Utilization  Number of Visits

Service Setting:

--Care Coordination  
--Outpatient - MH  
--Outpatient - Medical Specialty  
--Outpatient - SU  
--Outpatient - Unspecified

Service Detail: Selected

### Medication & Diagnosis as of 02/01/2020

Past 1 Year

### Services by Any Provider as of 02/01/2020

Past 1 Year

# Recipient Search: Individual

## Recipient Search

Limit results to 50 Search Reset

**Recipient Identifiers**

Search in:  Full Database  MAIN STREET CLINIC

Medicaid ID AB00000A	SSN 000-00-0000	First Name	Last Name	DOB MM/DD/YYYY
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**Enter Recipient Identifier and click Search**

**Characteristics** as of 02/24/2020

Age Range	To	Gender	MC Product Line	Children's Waiver Status
Population				HARP Status
High Need Population		Medicaid Restrictions		HARP HCBS Assessment Status
AOT Status		DSRIP PPS		HARP HCBS Assessment Results
Alerts & Incidents				

- Quality Flag** as of 02/01/2020
- HARP Enrolled - Not Health Home Enrolled - (updated weekly)
  - Antipsychotic Polypharmacy (2+ >90days) Children
  - Antipsychotic Two Plus
  - Antipsychotic Three Plus
  - Antidepressant Two Plus - SC
  - Antidepressant Three Plus
  - Psychotropics Three Plus
  - Psychotropics Four Plus
  - Polypharmacy Summary
  - Discontinuation - Antidepressant <12 weeks (MDE)
  - Adherence - Mood Stabilizer (Bipolar)
  - Adherence - Antipsychotic (Schz)
  - Treatment Engagement - Summary
  - No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (All)
  - No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (Child)
  - No Diabetes Monitoring (HbA1c and LDL-C) Diabetes and Schiz
  - No Diabetes Screening (Gluc/HbA1c) Schz or Bipolar on Antipsychotic Adults
  - No Diabetes Monitoring (HbA1c) Diabetes
  - BH QARR - 2018 Quality Incentive Subset Summary
  - BH QARR - 2018 Total Indicator Summary
  - No Outpatient Medical Visit >1 Yr

**Services: Specific Provider** as of 02/01/2020

Past 1 Year

Provider: MAIN STREET CLINIC

Region: County:

Current Access:

Service Utilization: Number of Visits:

Service Setting:

- Care Coordination
- Outpatient - MH
- Outpatient - Medical Specialty
- Outpatient - SU
- Outpatient - Unspecified

Service Detail: Selected

**Medication & Diagnosis** as of 02/01/2020

Past 1 Year

**Services by Any Provider** as of 02/01/2020

Past 1 Year

# Click on recipient name to go to Clinical Summary

**Recipient Identifiers** Search in:  Full Database  Main Street Clinic

Medicaid ID .....	SSN 	First Name 	Last Name 	DOB 
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[← Modify Search](#) PDF Excel

## 1 Recipients Found

Medicaid ID	XXXXXXXX					
AND	[Provider Specific] Provider Name	Main Street Clinic				
Maximum Number of Rows Displayed: 50						
Name ▲	Medicaid ID ▼	DOB ▼	Gender ▼	Quality Flags ▼	Managed Care Plan ▼	Current PHI Access ▼
<a href="#">Jedigah Cjdeahd</a> ←	Daacabc Egcdhfb	01/01/9999	Ddcfcfc Cdfiegc		Fidelis Care New York	All Data - Consent

# Recipient Search: Group

**Characteristics** as of 02/24/2020

Age Range <input type="text"/> To <input type="text"/>	Gender <input type="text"/>	Managed Care <input type="text"/>	Children's Waiver Status <input type="text"/>
Population <input type="text"/>		MC Product Line <input type="text"/>	HARP Status <input type="text"/>
High Need Population <input type="text"/>		Medicaid Restrictions <input type="text"/>	HARP HCBS Assessment Status <input type="text"/>
AOT Status <input type="text"/>		DSRIP PPS <input type="text"/>	HARP HCBS Assessment Results <input type="text"/>
Alerts & Incidents <input type="text"/>			

**Quality Flag** as of 11/01/2019

[Definitions](#)

- HARP Enrolled - Not Health Home Enrolled - (updated weekly)
- HARP-Enrolled - No Assessment for HCBS - (updated weekly)
- Antipsychotic Polypharmacy (2+ >90days) Children
- Antipsychotic Two Plus
- Antipsychotic Three Plus
- Antidepressant Two Plus - SC
- Antidepressant Three Plus
- Psychotropics Three Plus
- Psychotropics Four Plus
- Polypharmacy Summary
- Discontinuation - Antidepressant <12 weeks (MDE)
- Adherence - Mood Stabilizer (Bipolar)
- Adherence - Antipsychotic (Schiz)
- Treatment Engagement - Summary
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (Child)
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (All)
- No Metabolic Monitoring (Gluc/HbA1c) on Antipsychotic
- No Metabolic Monitoring (LDL-C) on Antipsychotic
- No Diabetes Screening (Gluc/HbA1c) Schiz or Bipolar on Antipsychotic Adults
- No Diabetes Monitoring (HbA1c and LDL-C) Diabetes and Schiz Adults

**Services: Specific Provider** as of 11/01/2019 Past 1 Year

Provider

Region  County

Current Access

Service Utilization  Number of Visits

Service Setting:

- Care Coordination
- Foster Care
- Inpatient - ER
- Living Support/Residential
- Other
- Outpatient - DD
- Outpatient - MH

Service Detail: Selected

**Medication & Diagnosis** as of 11/01/2019 Past 1 Year

Prescriber Last Name

Drug Name   Active Drug

Psychotropic Drug Class\*

Non-Psychotropic Drug Class\*

ADHD Med

Antidepressant

Antipsychotic

Antipsychotic - Long Acting Injunctabl

Analgesics and Anesthetics

Anti-infective Agents

Anti-Obesity Agents

Antidiabetic

Diagnosis

Diagnosis given   Primary Only  Primary/Secondary

BH Diagnosis

Medical Diagnosis

- Any BH Diagnosis
- Any MH Diagnosis
- Anxiety Disorders
- Bipolar and Related Disorders
- Certain conditions originating in the perinatal period
- Certain infectious and parasitic diseases
- Congenital malformations, deformations
- Diseases of the blood and blood-forming organs and certain disorders involving the immune mechanism

**Services by Any Provider** as of 11/01/2019 Past 1 Year

Provider

Region  County

Service Utilization  Number of Visits

Service Setting:

- Care Coordination
- Foster Care
- Inpatient - ER
- Living Support/Residential
- Other
- Outpatient - DD
- Outpatient - MH
- Outpatient - Medical
- Outpatient - Medical Speciality
- Outpatient - SU
- Outpatient - Unspecified

Service Detail: Selected

# Recipient Search: And / Or Search Logic

- Multiple selections within the same filter box creates an “Or” logic
  - Use the “Ctrl” key on keyboard
  - Recipients in search results have one selection or the other, for example:
    - Depression or Schizophrenia
- Multiple selections from separate filter boxes creates an “And” logic
  - Recipients in search results meet all of the selected criteria, for example:
    - Schizophrenia and Type 1 Diabetes

# Recipient Search: Look-back Periods

- Different filter options have different look-back periods in which the data in that filter is updated
- Read the date at the top of the main filter box
- Select a different look-back period from a drop-down box when available, if desired
  - Default for medications, diagnoses, and service settings is past 1 year as of the Recipient Search report date
  - Other options include past 6 months, 9 months, 2 years, 3 years, or specific calendar year

# Recipient Search: Max No. Rows to display

- Search results page will provide:
  - Total number of people who matched search criteria
  - The filter selections included in your search
  - Names of all the people who matched your search criteria
  - Ability to export names in search results to PDF or Excel
- The default number of names of people listed in your search results is 50
  - To see more than 50 names in your results page, expand the “Maximum No. of Rows to be displayed” drop-down located in Recipient Search screen by “Search” button

# Recipient Search: Data w/ Special Protection

- Certain data in PSYCKES has special protection:
  - Substance use, HIV, family planning, genetic testing
- When selecting a filter option from Recipient Search that contains data with special protection, results page will provide:
  - Total number of people who matched search criteria
  - Number of names excluded from your search results because you do not have their consent
  - Number of names included in your search results because you have their consent

# Recipient Characteristics

Characteristics as of 02/24/2020

Age Range <input type="text"/> To <input type="text"/> Gender <input type="text"/>	Managed Care <input type="text"/>	Children's Waiver Status <input type="text"/>
Population <input type="text"/>	MC Product Line <input type="text"/>	HARP Status <input type="text"/>
High Need Population <input type="text"/>	Medicaid Restrictions <input type="text"/>	HARP HCBS Assessment Status <input type="text"/>
AOT Status <input type="text"/>	DSRIP PPS <input type="text"/>	HARP HCBS Assessment Results <input type="text"/>
Alerts & Incidents <input type="text"/>		



# Transition from WMS to NYSoH: Report Filters

My QI Report ▾

Statewide Reports

Recipient Search

Provider Search

Registrar ▾

Usage

## Recipient Search

Characteristics as of 02/11/2020

Age Range

To

Gender

 ▾

Managed Care

 ▾

Child

Population

High Need Population

AOT Status

Alerts & Incidents

OPWDD Services Eligible (RE95)

Any OMH Outpatient Specialty MH Services

Medicaid Managed Care - Any

Medicaid Managed Care +SSI

Medicaid No Managed Care(FFS Only)

Dual Eligible (Medicaid + Medicare)

Medicaid (No Medicare)

Transition from WMS to NYSoH: Medicaid Recertification Due < 3 mo.

Transition from WMS to NYSoH: Medicaid Eligibility Expired



HAR

HAR

Quality Flag as of 11/01/2019

Services: Specific Provider as of

# Transition from WMS to NYSoH: Clinical Summary Message

My QI Report ▾ Statewide Reports Recipient Search Provider Search Registrar ▾ Usage Reports ▾ Utilization Reports MyCHOIS

← Recipient Search

SMITH, JANE

Clinical Summary as of 2/24/2020



PDF

Brief Overview

1 Year Summary

5 Year Summary

Data with Special Protection  Show  Hide

This report contains all available clinical data.

**DOB:** 2/1/1983 (37 yrs)

**Address:** 123 Main Street,  
Albany, NY 12208

**Medicaid ID:**

AB12345C

**Medicare:** No

**Managed Care Plan:** Independent Health's  
MediSource (HARP)

**MC Plan Assigned PCP:** Sharma, Nisha

**HARP Status:** HARP Enrolled (H1)

**HARP HCBS Assessment Status:** Never  
Assessed

## Current Care Coordination

### Medicaid Eligibility Alert

This client must use the New York State of Health (NYSoH) enrollment system for Medicaid recertification (Expiration: 02/29/2020) • For More information contact NYSoH at 1-855-355-5777.

# Medication & Diagnosis

**Medication & Diagnosis** as of 02/01/2020 Past 1 Year ▼

Prescriber Last Name

Drug Name   Active Drug

Psychotropic Drug Class\* Non-Psychotropic Drug Class\*

ADHD Med ▲	Analgesics and Anesthetics ▲
Antidepressant ▲	Anti-Infective Agents ▲
Antipsychotic ▲	Anti-Obesity Agents ▲
Antipsychotic - Long Acting Injectab ▼	Antidiabetic ▼

Diagnosis

Diagnosis given 1+ ▼  Primary Only  Primary/Secondary

<b>BH Diagnosis</b>	<b>Medical Diagnosis</b>
┆--Any BH Diagnosis ▲	┆--Certain conditions originating in the perir ▲
┆--Any MH Diagnosis ▲	┆--Certain infectious and parasitic diseases ▲
┆--Anxiety Disorders ▲	┆--Congenital malformations, deformations ▲
┆--Bipolar and Related Disorders ▼	┆--Diseases of the blood and blood-forming ▼

# Medication & Diagnosis

**Medication & Diagnosis** as of 10/01/2019 Past 1 Year

Prescriber Last Name

Drug Name   Active Drug

Psychotropic Drug Class\*

Non-Psychotropic Drug Class\*

Diagnosis

Diagnosis given   Prim

BH Diagnosis

Medical Diagnosis

**Controlled Substances**

Endocrine and Metabolic Drugs

Gastrointestinal Agents

Genitourinary Products

Hematological Agents

Miscellaneous Products

Neuromuscular Drugs

Nutritional Products

**Opioid Medications**

Respiratory Agents

# Services by a Specific Provider (Your Agency/Hospital)

**Services: Specific Provider** as of 10/01/2019 Past 1 Year ▾

Provider

Region  County

Current Access

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Service Utilization  Number of Visits

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Service Setting:

- ▣ Care Coordination
- ▣ Foster Care
- ▣ Inpatient - ER
- ▣ Living Support/Residential
- ▣ Other
- ▣ Outpatient - DD
- ▣ Outpatient - MH

Service Detail: Selected

# Services by Any Provider (Any Agency/Hospital in NYS)

**Services by Any Provider** as of 10/01/2019 Past 1 Year ▾

Provider

Region  County

Service Utilization  Number of Visits

Service Setting:

- +--Care Coordination
- +--Foster Care
- +--Inpatient - ER
- +--Living Support/Residential
- +--Other
- +--Outpatient - DD
- +--Outpatient - MH
- +--Outpatient - Medical
- +--Outpatient - Medical Specialty
- +--Outpatient - SU
- +--Outpatient - Unspecified

Service Detail: Selected

# Bulk Population Management Views in Recipient Search

# Recipient Search: Group

## Recipient Search

Limit results to

- 50
- 50
- 100
- 500
- 1,000
- 10,000
- 50,000
- 100,000
- 250,000
- 500,000



### Recipient Identifiers

Medicaid ID <input type="text" value="AB00000A"/>	SSN <input type="text" value="000-00-0000"/>	First Name <input type="text"/>	Last Name <input type="text"/>	DOB/YYYY <input type="text"/>
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### Characteristics as of 02/24/2020

Age Range <input type="text"/> To <input type="text"/> Gender <input type="text"/>	Managed Care <input type="text"/>	Children's Waiver Status <input type="text"/>
Population <input type="text"/>	MC Product Line <input type="text"/>	HARP Status <input type="text"/>
High Need Population <input type="text"/>	Medicaid Restrictions <input type="text"/>	HARP HCBS Assessment Status <input type="text"/>
AOT Status <input type="text"/>	DSRIP PPS <input type="text"/>	HARP HCBS Assessment Results <input type="text"/>
Alerts & Incidents <input type="text"/>		

### Quality Flag as of 11/01/2019

[Definitions](#)

### Services: Specific Provider as of 11/01/2019

Past 1 Year ▾

- HARP Enrolled - Not Health Home Enrolled - (updated weekly)
- HARP-Enrolled - No Assessment for HCBS - (updated weekly)
- Antipsychotic Polypharmacy (2+ >90days) Children
- Antipsychotic Two Plus
- Antipsychotic Three Plus
- Antidepressant Two Plus - SC
- Antidepressant Three Plus
- Psychotropics Three Plus
- Psychotropics Four Plus
- Polypharmacy Summary
- Discontinuation - Antidepressant <12 weeks (MDE)
- Adherence - Mood Stabilizer (Bipolar)
- Adherence - Antipsychotic (Schiz)
- Treatment Engagement - Summary
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (Child)
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (All)
- No Metabolic Monitoring (Gluc/HbA1c) on Antipsychotic
- No Metabolic Monitoring (LDL-C) on Antipsychotic
- No Diabetes Screening (Gluc/HbA1c) Schiz or Bipolar on Antipsychotic Adults

Provider

Region  County

Current Access

Service Utilization  Number of Visits

- Service Setting:
- +- Care Coordination
  - +- Foster Care
  - +- Inpatient - ER
  - +- Living Support/Residential
  - +- Other
  - +- Outpatient - DD
  - +- Outpatient - MH
- Service Detail: Selected

# Recipient Search: Standard View

◀ Modify Search

## 2,062 Recipients Found

View: **Standard**  
Care Coordination  
Hospital Utilization



[Provider Specific] Provider   MAIN STREET MENTAL HEALTH CENTER

Maximum Number of Rows Displayed: 50

Name ▲	Medicaid ID ▾	DOB ▾	Gender ▾	Quality Flags ▾	Managed Care Plan ▾	Current PHI Access ▾
SMITH JOHN	ABCD1234	8/16/1964	M - 55	2+ ER-Medical, HARP No Assessment for HCBS, HARP No Health Home	Fidelis Care New York	PSYCKES Consent, CBC IPA BHCC Consent
DOE JANE	XYZ01234	3/25/1975	F - 44		HIP (EmblemHealth)	No Access
BROWN SUE	XYZ4567A	12/26/1984	F - 35	2+ ER-Medical, 2+ Inpt-BH, No Outpt Medical		Quality Flag
WASHINGTON GEORGE	HIJ09876	10/16/1964	M - 55	2+ ER-Medical, 2+ Inpt-Medical, 4+ Inpt/ER-Med, HARP No Assessment for HCBS, Readmit 30d - Medical to Medical	HIP (EmblemHealth)	Quality Flag
JONES BOB	QAS4567	2/25/1969	M - 50	2+ ER-Medical, 4+ Inpt/ER-Med, BH QARR - DOH, No HbA1c-DM	Healthfirst PHSP, Inc.	Quality Flag

# Recipient Search: Care Coordination View

[← Modify Search](#)

## 2,062 Recipients Found

View Standard Care Coordination Hospital Utilization  Excel

[Provider Specific] Provider   MAIN STREET MENTAL HEALTH CENTER

Maximum Number of Rows Displayed: 50

Applicable data is displayed for recipients with quality flag or consent.

Name ▲	Medicaid ID ▾	DOB ▾	Gender ▾	Current PHI Access ▾	Managed Care Plan ▾	HARP Status (H Code) ▾	Children's Waiver Status (K Code) ▾
SMITH JOHN	ABCD1234	8/16/1964	M - 55	Health Home Consent (DOH 5055), CBC IPA BHCC Consent			
BROWN SUE	XYZ4567A	12/26/1984	F - 35	PSYCKES Consent, CBC IPA BHCC Consent	Fidelis Care New York	Enrolled No HCBS Eligibility Assessment (H1)	
DOE JANE	XYZ01234	3/25/1975	F - 44	No Access	HIP (EmblemHealth)		
WASHINGTON GEORGE	HIJ09876	6/25/1984	F - 35	Quality Flag			

**CLICK HERE TO SCROLL**

# Recipient Search: Care Coordination View

[← Modify Search](#)

## 2,062 Recipients Found

View Standard Care Coordination Hospital Utilization 

[Provider Specific] Provider      MAIN STREET MENTAL HEALTH CENTER

Maximum Number of Rows Displayed: 50

Applicable data is displayed for recipients with quality flag or consent.

Name ▲	Health Home Name (Enrolled) ⌵	Care Management Name (Enrolled) ⌵	ACT Provider (Active) ⌵	OnTrackNY Early Psychosis Program (Enrolled) ⌵	
SMITH JOHN	COORDINATED BEHAVIORAL CARE INC	PROJECT HOSPITALITY INC AI			
BROWN SUE					
DOE JANE					
WASHINGTON GEORGE					

CLICK HERE TO SCROLL



# Recipient Search: Care Coordination View

[← Modify Search](#)

## 2,062 Recipients Found

View Standard **Care Coordination** Hospital Utilization Excel

[Provider Specific] Provider   MAIN STREET MENTAL HEALTH CENTER

Maximum Number of Rows Displayed: 50

Applicable data is displayed for recipients with quality flag or consent.

Name	led	ACT Provider (Active)	OnTrackNY Early Psychosis Program (Enrolled)	AOT Status	AOT Provider (Active)
SMITH JOHN					
BROWN SUE				Active Curt Order	Family Service League, Inc.
DOE JANE					
WASHINGTON GEORGE					

# Recipient Search: Hospital Utilization View

**2,062 Recipients Found**

Standard  
Care Coordination  
**Hospital Utilization**



View:

[← Modify Search](#)

[Provider Specific] Provider   MAIN STREET MENTAL HEALTH CENTER

Maximum Number of Rows Displayed: 50

Applicable data is displayed for recipients with quality flag or consent.

Name ▲	Medicaid ID ⌵	DOB ⌵	Gender ⌵	Managed Care Plan ⌵	Current PHI Access ⌵	# ER Services Past Yr			# Inpatient Services Past Yr		
						ALL ⌵	Behavioral Health ⌵	Medical ⌵	ALL ⌵	Behavioral Health ⌵	Medical ⌵
SMITH JOHN	ABCD1234	8/16/1964	M - 55		Health Home Consent (DOH 5055), CBC IPA BHCC Consent				1	1	
BROWN SUE	XYZ4567A	12/26/1984	F - 35	Fidelis Care New York	PSYCKES Consent, CBC IPA BHCC Consent	2		2			
DOE JANE	XYZ01234	3/25/1975	F - 44	HIP (EmblemHealth)	No Access						
WASHINGTON GEORGE	HIJ09876	6/25/1984	F - 35		Quality Flag	3	1	2	1	1	

# Recipient Search: Outpatient Providers - PCP Assignment

My QI Report ▾

Statewide Reports

Recipient Search

Provider Search

Registrar ▾

Usage Reports ▾

Utilization Reports

MyCHOIS

[← Modify Search](#)

## 1,115 Recipients Found

View: Outpatient Providers ▾



Excel



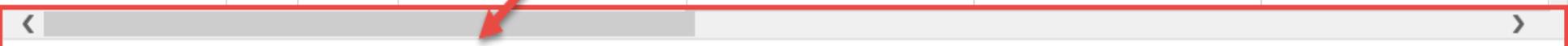
PROVIDER: MAIN STREET CLINIC

Review recipients in results carefully before accessing Clinical Summary.

Maximum Number of Rows Displayed: 50

Name	DOB	Gender	Managed Care Plan	Primary Care Physician Assignment(Assigned by MC Plan)		
				Name	Most Recent Service Past 1 yr	# Visits with Assigned PCP past 1 yr
SMITH JOHN	/1964	M - 55	UnitedHealthcare Community Plan	KUMARI, JAISHREE	10/14/2019	14
DOE JANE	/1975	F - 44		SMALL, ALLEN	8/9/2019	21
JONES SUE	/1983	F - 37	Fidelis Care			
BROWN BOB	?/1990	M - 30	Healthfirst PHSP, Inc.	DOMINGUEZ-RAFER, CARMEN		

**CLICK HERE TO SCROLL**



# Recipient Search: Outpatient Providers - Mental Health Outpatient

[← Modify Search](#)

## 1,115 Recipients Found

View: Outpatient Providers ▾  Excel

PROVIDER: MAIN STREET CLINIC

Review recipients in results carefully before accessing Clinical Summary.

Maximum Number of Rows Displayed: 50

Name ▲	Mental Health Outpatient Provider			Medical Outpatient Provider	
	Most Recent Provider Facility Name ▾	Most Recent Service Past 1 yr ▾	# Services this Provider Past 1 yr ▾	Most Recent Provider Facility Name ▾	Most Recent Service Past 1 yr ▾
SMITH JOHN	MANHATTAN PSYCHIATRIC CENTER	11/12/2019	12	INSTITUTE FOR FAMILY HLTH	10/24/2019
DOE JANE	MONTEFIORE MEDICAL CENTER	12/9/2019	2	MEMORIAL HSP CANCER ALLIED	3/1/2019
JONES SUE	LONG ISLAND CONSULTATION CENTER, INC.	12/16/2019	23		
BROWN BOB	NYC-HHC METROPOLITAN HOSPITAL CENTER	12/17/2019	9	LENOX HILL HOSPITAL	10/9/2019

CLICK HERE TO SCROLL



# Recipient Search: Outpatient Providers - Medical Outpatient

[← Modify Search](#)

## 1,115 Recipients Found

View: Outpatient Providers ▾



Excel

PROVIDER: MAIN STREET CLINIC

Review recipients in results carefully before accessing Clinical Summary.

Maximum Number of Rows Displayed: 50

Name	Outpatient Provider		Medical Outpatient Provider		
	Most Recent Service Past 1 yr	# Services this Provider Past 1 yr	Most Recent Provider Facility Name	Most Recent Service Past 1 yr	# Services this Provider Past 1 yr
SMITH JOHN			HERITAGE HEALTH AND HOUSING, INC	1/17/2020	11
DOE JANE			COMMUNITY HEALTHCARE NETWORK	1/3/2020	2
JONES SUE		10	MORRIS HEIGHTS HEALTH CENTER	12/18/2019	1
BROWN BOB			NY HOSPITAL	12/17/2019	7

**CLICK HERE TO SCROLL**



# Recipient Search: Example Searches



**Office of  
Mental Health**

# Identify recipients based on AOT status

1. Login to PSYCKES and go to “Recipient Search”
2. Select from AOT Status filter:
  - Active Court Order
  - Expired < 6 months
  - Expired < 12 months
  - Active or expired within the last 3 years
3. Consider expanding “Maximum number of rows to be displayed” in order to see more than 50 names in results page (if needed)
4. Click Search

# Recipient Search

Limit results to

50

Search

Reset

## Recipient Identifiers

Medicaid ID

SSN

Name

Last Name

DOB

AB00000A

000-00-0000

MM/DD/YYYY

1. Click "Recipient Search" from top menu options

## Characteristics as of 02/24/2020

Age Range  To  Gender

Population

High Need Population

AOT Status

Alerts & Incidents

Managed Care

MC Product Line

Medicaid Restrictions

DSRIP PPS

Children's Waiver Status

HARP Status

HARP HCBS Assessment Status

HARP HCBS Assessment Results

2. from AOT Status filter

## Quality Flag as of 11/01/2019

- HARP Enrolled - Not Health Home Enrolled - (updated weekly)
- HARP-Enrolled - No Assessment for HCBS - (updated weekly)
- Antipsychotic Polypharmacy (2+ >90days) Children
- Antipsychotic Two Plus
- Antipsychotic Three Plus
- Antidepressant Two Plus - SC
- Antidepressant Three Plus
- Psychotropics Three Plus
- Psychotropics Four Plus
- Polypharmacy Summary
- Discontinuation - Antidepressant <12 weeks (MDE)
- Adherence - Mood Stabilizer (Bipolar)
- Adherence - Antipsychotic (Schiz)
- Treatment Engagement - Summary
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (Child)
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (All)
- No Metabolic Monitoring (Gluc/HbA1c) on Antipsychotic
- No Metabolic Monitoring (LDL-C) on Antipsychotic
- No Diabetes Screening (Gluc/HbA1c) Schiz or Bipolar on Antipsychotic Adults
- No Diabetes Monitoring (HbA1C and LDL-C) Diabetes and Schiz Adults
- No Diabetes Monitoring (HbA1c) Diabetes

## Services: Specific Provider as of 11/01/2019

Past 1 Year

Provider

Region  County

Current Access

Service Utilization  Number of Visits

### Service Setting:

- + Care Coordination
- + Foster Care
- + Inpatient - ER
- + Living Support/Residential
- + Other
- + Outpatient - DD
- + Outpatient - MH

### Service Detail: Selected

## 2. Select from AOT Status filter (detail)

**Characteristics** as of 02/24/2020

Age Range	<input type="text"/>	To	<input type="text"/>	Gender	<input type="text"/>	Managed Care	<input type="text"/>
						MC Product Line	<input type="text"/>
Population						Medicaid Restrictions	<input type="text"/>
High Need Population						DSRIP PPS	<input type="text"/>
<b>AOT Status</b>							
Alerts & Incidents							

**Quality Flag** as of 11/01/2019

- AOT-Active Court Order
- AOT-Expired < 6 months
- AOT-Expired < 12 months
- AOT Active or expired within the last 3 years

[Definitions](#) **Se**

MAPS Enrolled Not Health Home Enrolled (updated weekly)

No Diabetes Monitoring (HbA1c) Diabetes

Outpatient - MH

### Medication & Diagnosis as of 11/01/2019

Past 1 Year

Prescriber Last Name

Drug Name  Active Drug

Psychotropic Drug Class\*

ADHD Med  
Antidepressant  
Antipsychotic  
Antipsychotic - Long Acting Injectabl

Non-Psychotropic Drug Class\*

Analgesics and Anesthetics  
Anti-Infective Agents  
Anti-Obesity Agents  
Antidiabetic

Diagnosis

Diagnosis given 1+  Primary Only  Primary/Secondary

BH Diagnosis

Any BH Diagnosis  
Any MH Diagnosis  
Anxiety Disorders  
Bipolar and Related Disorders

Medical Diagnosis

Certain conditions originating in the perin  
Certain infectious and parasitic diseases  
Congenital malformations, deformations  
Diseases of the blood and blood-forming

### Services by Any Provider as of 11/01/2019

Past 1 Year

Provider

Region County

Service Utilization Number of Visits

Service Setting:

Care Coordination  
Foster Care  
Inpatient - ER  
Living Support/Residential  
Other  
Outpatient  
Outpatient  
Outpatient  
Outpatient  
Outpatient  
Outpatient - Unspecified

Service Detail: Selected

**3. Consider expanding number of recipient names to be displayed**

50  
100  
500  
1,000  
10,000  
50,000  
100,000  
250,000  
500,000

Limit results to

**4. Click Search**

Search Reset

- Recipient Related data is refreshed weekly and all other sections are refreshed monthly.
- Search uses "OR" criteria within a list and "AND" criteria between lists.
- \*To select multiple options within a list, hold down "CTRL" while making additional selections.



Modify Search

103 Recipients Found

View: Standard



Search results can be exported to PDF or Excel.

AOT Status

AOT-Active Court Order

AND [Provider Specific] Provider

Main Street Clinic

Review recipients in results carefully before accessing Clinical Summary.

Maximum Number of Rows Displayed: 50

Name	Medicaid ID	DOB	Gender	Quality Flags	Managed Care Plan
QUJSRVU SazTRQ QaVUVFa	WVETODUp Mva	MSynMCyn OT2q	R6 LQ NDU	2+ ER-BH, 2+ ER-MH, 2+ Inpt-BH, 2+ Inpt-MH, 2AP, 4+ Inpt/ER-BH, 4+ Inpt/ER-MH, BH QARR - DOH, POP High User, Readmit 30d - BH to BH, Readmit 30d - MH to MH	Healthfirst PHSP, Inc.
QUNFVaVETm TqnHQQ SQ	WbMmMpa mNrl	N8yoM8ynO TYr	R6 LQ NTQ	2+ ER-BH, 2+ ER-MH, 2+ Inpt-BH, 2+ Inpt-MH, 4+ Inpt/ER-BH, 4+ Inpt/ER-MH, BH QARR - DOH, Cloz Candidate, HARP No Health Home, POP Cloz Candidate, POP High User, Readmit 30d - BH to BH, Readmit 30d - MH to MH	Healthfirst PHSP, Inc.
QUnTQubESQ VEFIQQ	VUlnOD6m Ma6			H, 2+ ER-MH, 2+ Inpt-BH, 2+ Inpt-MH, 4+ Inpt/ER-BH, 4+ Inpt/ER-MH, BH QARR - Cloz Candidate, No HbA1c & LDL-C (DM & Schiz), No HbA1c-DM, POP Cloz Candidate, POP High User, Readmit 30d - BH to BH, Readmit 30d - MH to MH	MetroPlus Health Plan
QVZFUbNBTAy TubDSEFFTA	WbemNDUr Nre	MTElOCynO T2q	TQ LQ NDQ		
QaFEQUJlUq7BT6 TUzTVEFGQQ	VFapMp6qN El	MSynNCyn OTYt	TQ LQ NTI	2+ Inpt-BH, 2+ Inpt-MH, Adher-AP, BH QARR - DOH	WellCare of New York

Click on a recipient name to review Clinical Summary

# Identify recipients enrolled in a specific Managed Care Plan

1. Go to “Recipient Search” screen
2. Select from Managed Care (MC) filter:
  - Click on name of MC Plan
3. Choose from additional filter options in Recipient Search screen, if desired
4. Consider expanding “Maximum number of rows to be displayed” if needed
5. Click Search

# Recipient Search

Limit results to

50

Search

Reset

## Recipient Identifiers

Medicaid ID

AB00000A

SSN

000-00-0000

Name

Last Name

DOB

MM/DD/YYYY

1. Click "Recipient Search" from top menu options

2. Select from Managed Care (MC) filter

## Characteristics as of 02/24/2020

Age Range  To  Gender

Population

High Need Population

AOT Status

Alerts & Incidents

Managed Care

MC Product Line

Medicaid Restrictions

DSRIP PPS

Children's Waiver Status

HARP Status

HARP HCBS Assessment Status

HARP HCBS Assessment Results

## Quality Flag as of 11/01/2019

Definitions

## Services: Specific Provider as of 11/01/2019

Past 1 Year

- HARP Enrolled - Not Health Home Enrolled - (updated weekly)
- HARP-Enrolled - No Assessment for HCBS - (updated weekly)
- Antipsychotic Polypharmacy (2+ >90days) Children
- Antipsychotic Two Plus
- Antipsychotic Three Plus

Provider

Region

County

## 2. Select from Managed Care (MC) filter (detail)

The screenshot displays a web interface with a dropdown menu open for the 'Managed Care' filter. The dropdown list includes the following options:

- Any Managed Care
- Affinity Health Plan
- Amerigroup New York
- Amida Care
- CDPHP
- CenterLight Healthcare
- Excellus BlueCross BlueShield
- Fidelis Care New York
- HIP (EmblemHealth)
- HealthNow New York Inc.
- Healthfirst PHSP, Inc.
- Hudson Health Plan
- Independent Health's MediSource MVP
- MetroPlus Health Plan
- Neighborhood Health Providers
- Total Care
- UnitedHealthcare Community Plan
- VNSNY Choice Select Health

Other visible elements in the interface include a 'Definitions' link, a 'Filter as of 11/01' label, and a table with columns for 'Children's W' and 'HARP HCBS'.

Age Range  To  Gender   
Population   
High Need Population   
AOT Status   
Alerts & Incidents

Managed Care  MetroPlus Health Plan  
MC Product Line   
Medicaid Restrictions   
DSRIP PPS

Children's Waiver Status   
HARP Status   
HARP HCBS Assessment Status   
HARP HCBS Assessment Results

3. Choose from additional filter options, if desired

Quality Flag as of 02/01/2020

Definit

as of 02/01/2020

Post 1 Year

HARP Enrolled - Not Health Home Enrolled - (updated weekly)

- Antipsychotic Polypharmacy (2+ >90days) Children
- Antipsychotic Two Plus
- Antipsychotic Three Plus
- Antidepressant Two Plus - SC
- Antidepressant Three Plus
- Psychotropics Three Plus
- Psychotropics Four Plus
- Polypharmacy Summary
- Discontinuation - Antidepressant <12 weeks (MDE)
- Adherence - Mood Stabilizer (Bipolar)
- Adherence - Antipsychotic (Schiz)
- Treatment Engagement - Summary
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (Child)
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (All)
- No Metabolic Monitoring (Gluc/HbA1c) on Antipsychotic
- No Metabolic Monitoring (LDL-C) on Antipsychotic
- No Diabetes Screening (Gluc/HbA1c) Schiz or Bipolar on Antipsychotic Adults
- No Diabetes Monitoring (HbA1c and LDL-C) Diabetes and Schiz Adults
- No Diabetes Monitoring (HbA1c) Diabetes

Medication & Diagnosis as of 02/01/2020

Post 1 Year

Services by Any Provider as of 02/01/2020

Post 1 Year

Prescriber Last Name   
Drug Name   Active Drug

Psychotropic Drug Class\*   
ADHD Med  
Antidepressant  
Antipsychotic  
Antipsychotic - Long Acting Injectab

Non-Psychotropic Drug Class\*   
Analgesics and Anesthetics  
Anti-Infective Agents  
Anti-Obesity Agents  
Antidiabetic

Diagnosis   
Diagnosis given  1+  Primary Only  Primary/Secondary

BH Diagnosis   
Any BH Diagnosis  
Any MH Diagnosis  
Anxiety Disorders  
Bipolar and Related Disorders

Medical Diagnosis   
Certain conditions originating in the peri  
Certain infectious and parasitic diseases  
Congenital malformations, deformations  
Diseases of the blood and blood-forminc

4. Consider expanding number of recipient names to be displayed

5. Click Search

- Recipient Related data is refreshed weekly and all other sections are refreshed monthly.  
- Search uses "OR" criteria within a list and "AND" criteria between lists.  
- \*To select multiple options within a list, hold down "CTRL" while making additional selections.

Limit results to  50

[← Modify Search](#)

# 138 Recipients Found

View: Standard



Managed Care	MetroPlus Health Plan
AND Quality Flag	HARP Enrolled - Not Health Home Enrolled - (updated weekly)
AND [Provider Specific] Provider	Main Street Clinic

Review recipients in results carefully before accessing Clinical Summary.

Maximum Number of Rows Displayed: 50

Name	Medicaid ID	DOB	Gender	Quality Flags	Managed Care Plan
<a href="#">QUUnJTaa</a> <a href="#">Qq7SSVNUUSUvF QQ</a>	VqEvN9ErN VA	NCyrLpEvN 9I	R6 LQ NT2	HARP No Assessment for HCBS, HARP No Health Home	MetroPlus Health Plan
<a href="#">QUvDUbVN</a> <a href="#">TUFSSQUvDSUE Tm</a>	Vb6mNT2s NqY	OCyoM8ynO Tap	R6 LQ M9Y	HARP No Assessment for HCBS, HARP No Health Home	MetroPlus Health Plan
<a href="#">QUvERVJTTqu</a> <a href="#">SaVOTabGRVI</a>	WaeoN9EuO FA	M8ynNCynO TUv	R6 LQ N9A	2+ ER-BH, 2+ ER-MH, 2+ ER-Medical, 2+ Inpt-BH, 2+ Inpt-MH, 4+ Inpt/ER-BH, 4+ Inpt/ER-MH, 4+ Inpt/ER-Med, BH QARR - DOH, Cloz Candidate, HARP No Assessment for HCBS, HARP No Health Home, No HbA1c & LDL-C (DM & Schiz), POP Cloz Candidate, POP High User, Readmit 30d - BH to BH, Readmit 30d - MH to MH	MetroPlus Health Plan
<a href="#">QVNFTA REzOTaE TQ</a>	Wa6sNDEq Nra	MTIIM9YIM TasMm	R6 LQ NTU	HARP No Assessment for HCBS, HARP No Health Home	MetroPlus Health Plan
<a href="#">QaFFW6 VqbMTEbBTQ</a>	VE6sMDatO VI	NoyoMoynO TYt	TQ LQ NTI	4PP(A), HARP No Health Home	MetroPlus Health Plan
<a href="#">QaFSTaVT RbJFRERJRQ</a> <a href="#">TA</a>	WbAmOTQu MbE	NoyoMSynO T6n	TQ LQ Mp6	HARP No Assessment for HCBS, HARP No Health Home, No Gluc/HbA1c & LDL-C - AP, No Gluc/HbA1c - AP, No LDL-C - AP, No Outpt Medical	MetroPlus Health Plan

# Identify recipients based on HARP status

1. Go to “Recipient Search” screen
2. Select from HARP Status filter, for example:
  - Enrolled All (H1-H3)
3. Consider expanding “Maximum number of rows to be displayed” if needed
4. Click Search

# Recipient Search

Limit results to

Reset

1. Click "Recipient Search" from top menu options

## Recipient Identifiers

Medicaid ID

SSN

First Name

Last Name

DOB

## Characteristics as of 02/24/2020

Age Range  To  Gender

Population

High Need Population

AOT Status

Alerts & Incidents

Managed Care

MC Product

Medicaid Restriction

DSRIP PPS

2. Select from HARP Status filter

Children's Waiver Status

HARP Status

HARP HCBS Assessment Status

HARP HCBS Assessment Results

## 2. Select from HARP Status filter (detail)

Characteristics as of 02/24/2020

Age Range  To  Gender   
Population   
High Need Population   
AOT Status   
Alerts & Incidents

Managed Care   
MC Product Line   
Medicaid Restrictions   
DSRIP PPS

Children's Waiver Status   
HARP Status

HARP HCBS Assessment Status  
HARP HCBS Assessment Results

- Eligible/Enrolled All (H1-H9)
- HARP Enrolled (H1)
- HARP Enrolled Tier 1 HCBS (H1 with H2)
- HARP Enrolled Tier 2 HCBS (H1 with H3)
- SNP HARP Eligible (H4)
- SNP HARP Eligible Tier 1 HCBS (H4 with H5)
- SNP HARP Eligible Tier 2 HCBS (H4 with H6)
- Eligible Pending Enrollment (H9)
- Not HARP Eligible (Current Medicaid Enrollees excluding H1-H9)

Quality Flag as of 11/01/2019

[Definitions](#)

Services: Specific Provider as of 11/01/2019

HARP Enrolled - Not Health Home Enrolled - (updated weekly)



Office of Mental Health

**Medication & Diagnosis** as of 11/01/2019

Past 1 Year

Prescriber Last Name

Drug Name   Active Drug

---

Psychotropic Drug Class\* Non-Psychotropic Drug Class\*

ADHD Med

Antidepressant

Antipsychotic

Antipsychotic - Long Acting Injectable

Analgesics and Anesthetics

Anti-Infective Agents

Anti-Obesity Agents

Antidiabetic

---

Diagnosis

Diagnosis given   Primary Only  Primary/Secondary

---

BH Diagnosis Medical Diagnosis

Any BH Diagnosis

Any MH Diagnosis

Anxiety Disorders

Bipolar and Related Disorders

Certain conditions originating in the perinatal period

Certain infectious and parasitic diseases

Congenital malformations, deformations and chromosomal abnormalities

Diseases of the blood and blood-forming organs and certain disorders involving the immune mechanism

**Services by Any Provider** as of 11/01/2019

Past 1 Year

Provider

Region  County

---

Service Utilization  Number of Visits

---

Service Setting: Service Detail: Selected

Care Coordination

Foster Care

Inpatient - ER

Living Support/Residential

Other

Outpatient

Outpatient - Unspecified

Practitioner - BH

**3. Consider expanding number of recipient names to be displayed**

**4. Click Search**

---

Limit results to

- Recipient Related data is refreshed weekly and all other sections are refreshed monthly.
- Search uses "OR" criteria within a list and "AND" criteria between lists.
- \*To select multiple options within a list, hold down "CTRL" while making additional selections.

< Modify Search

## 612 Recipients Found

View: Standard



Search results can be exported to PDF or Excel.

HARP Status

Eligible/Enrolled All (H1-H9)

AND [Provider Specific] Provider

MAIN STREET CLINIC

Review recipients in results carefully before accessing Clinical Summary.

Maximum Number of Rows Displayed: 50

Name	Medicaid ID	DOB	Gender	Quality Flags	Managed Care Plan
<a href="#">QUFSTqu REVCUaE</a>	WF2vNTYo MrU	NSynMoynO TYs	R6 LQ NTM	HARP No Assessment for HCBS	Healthfirst PHSP, Inc.
<a href="#">QUJBTEzW SqFSSUvB Qm</a>	UqioM9UqM Ui	OSyoNoynO T6p	R6 LQ MpY	2+ ER-BH, 2+ ER-Medical, HARP No Health Home, No MAT Utilization - OUD, No OUD MAT Initiation - 30d	UnitedHealthcare Community Plan
<a href="#">QUJEVVIJuaFISUq TVVTVEFQSEE TA</a>	VFAoODYpN F6	NCyoMoynO T6n	TQ LQ MoU	Adher-AP, BH QARR - DOH, HARP No Assessment for HCBS	Healthfirst PHSP, Inc.
<a href="#">QUJSQRpV6 QVJBUaFU</a>	VMuMplo OE6	MoynNSynO T6n	R6 LQ N9Q	HARP No Assessment for HCBS, HARP No Health Home	UnitedHealthcare Community Plan
<a href="#">QUJSQRpV6 TabTSUq</a>	UqEoODMt Mq2	MoynNSynO T2	R6 LQ N9I	2+ ER-Medical, 4PP(A), HARP No Assessment for HCBS, HARP No Health Home	Fidelis Care New York
<a href="#">QUJSRVU TUVSqqVERVM</a>	WbEmN96m NVI	MoynNSynO Tur	R6 LQ N9Q	HARP No Assessment for HCBS, HARP No Health Home	Amerigroup New York

Click on a recipient name to review Clinical Summary



# Identify recipients with any ACT services

1. Go to “Recipient Search” screen
2. Locate the “Service Setting” filter box in the “Services by Any Provider” section
3. Expand the “Care Coordination” service setting by clicking the + sign
4. Click on “ACT – MH Specialty”
5. Consider expanding “Maximum number of rows to be displayed” if needed
6. Click Search

# Recipient Search

Limit results to 50 Search Reset

## Recipient Identifiers

Medicaid ID:  SSN:  Name:  Last Name:  DOB:

1. Click "Recipient Search" from top menu options

## Characteristics as of 02/24/2020

Age Range:  To:  Gender:  Population:  High Need Population:  AOT Status:  Alerts & Incidents:

Managed Care:  MC Product Line:  Medicaid Restrictions:  DSRIP PPS:

Children's Waiver Status:  HARP Status:  HARP HCBS Assessment Status:  HARP HCBS Assessment Results:

## Quality Flag as of 11/01/2019

- HARP Enrolled - Not Health Home Enrolled - (updated weekly)
- HARP-Enrolled - No Assessment for HCBS - (updated weekly)
- Antipsychotic Polypharmacy (2+ >90days) Children
- Antipsychotic Two Plus
- Antipsychotic Three Plus
- Antidepressant Two Plus - SC
- Antidepressant Three Plus
- Psychotropics Three Plus
- Psychotropics Four Plus
- Polypharmacy Summary
- Discontinuation - Antidepressant <12 weeks (MDE)
- Adherence - Mood Stabilizer (Bipolar)
- Adherence - Antipsychotic (Schiz)
- Treatment Engagement - Summary
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (Child)
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (All)
- No Metabolic Monitoring (Gluc/HbA1c) on Antipsychotic
- No Metabolic Monitoring (LDL-C) on Antipsychotic
- No Diabetes Screening (Gluc/HbA1c) Schiz or Bipolar
- No Diabetes Medication (HbA1c and LDL-C) Diabetes

## Services: Specific Provider as of 11/01/2019

Provider:  Region:  County:

Current Access:

Service Utilization:  Number of Visits:

Service Setting: 

- Outpatient - MH
- Outpatient - Medical
- Outpatient - Medical Specialty
- Outpatient - SU
- Outpatient - Unspecified
- Practitioner - BH
- State Psych Center Services (Sol)

Service Detail: Selected

2. Locate the Service Setting filter box in "Any Provider" section

## Medication & Diagnosis as of 11/01/2019

Prescriber Last Name:  Drug Name:   Active Drug

Psychotropic Drug Class\*:  Non-Psychotropic Drug Class\*:

Diagnosis:  Diagnosis given:   Primary Only  Primary/Secondary

BH Diagnosis: 

- Any BH Diagnosis
- Any MH Diagnosis
- Anxiety Disorders
- Bipolar and Related Disorders

Medical Diagnosis: 

- Certain conditions originating in the per
- Certain infectious and parasitic disease
- Congenital malformations, deformations
- Diseases of the blood and blood-forminc

## Services by Any Provider as of 11/01/2019

Provider:  Region:  County:

Service Utilization:  Number of Visits:

Service Setting: 

- Care Coordination
- Foster Care
- Inpatient - ER
- Living Support/Residential
- Other
- Outpatient - DD
- Outpatient - MH
- Outpatient - Medical
- Outpatient - Medical Specialty
- Outpatient - SU
- Outpatient - Unspecified

Service Detail: Selected

### 3. Expand the Care Coordination Service Setting

Service Setting

Service Detail: Selected

A screenshot of a web application interface showing a list of service settings. The list is titled "Service Setting" and "Service Detail: Selected". The list includes items like "Care Coordination", "ACT - MH Specialty", "Care Management - Enrolled (Source: DOH)", etc. Two red callout boxes with arrows point to specific elements: one points to a plus sign next to "Care Coordination" and the other points to "ACT - MH Specialty".

- + Care Coordination
- ACT - MH Specialty
- Care Management - Enrolled (Source: DOH)
- Care Management - Enrolled/Outreach (Source: DOH)
- Care Management - Outreach (Source: DOH)
- Care Management - ALL
- Case Management - DOH
- Case Management - OMH
- Child Waiver Services - OMH
- Health Home - Enrolled (Source: DOH)
- Health Home - Enrolled/Outreach (Source: DOH)
- Health Home - Outreach (Source: DOH)
- Health Home Plus
- Health Home and/or Care Management - Enrolled (Source: DOH and Medicaid)

3. Expand the Care Coordination service setting by clicking on + sign

4. Select ACT – MH Specialty

**Medication & Diagnosis** as of 11/01/2019

Past 1 Year

Prescriber Last Name

Drug Name   Active Drug

Psychotropic Drug Class\*

- ADHD Med
- Antidepressant
- Antipsychotic
- Antipsychotic - Long Acting Injectabl

Non-Psychotropic Drug Class\*

- Analgesics and Anesthetics
- Anti-Infective Agents
- Anti-Obesity Agents
- Antidiabetic

Diagnosis

Diagnosis given 1+  Primary Only  Primary/Secondary

BH Diagnosis

- Any BH Diagnosis
- Any MH Diagnosis
- Anxiety Disorders
- Bipolar and Related Disorders

Medical Diagnosis

- Certain conditions originating in the perin
- Certain infectious and parasitic diseases
- Congenital malformations, deformations
- Diseases of the blood and blood-forming

**Services by Any Provider** as of 11/01/2019

Past 1 Year

Provider

Region  County

Service Utilization  Number of Visits

Service Setting:

- Care Coordination
  - ACT - MH Specialty
  - Care Coordination Organizatio
  - Care Management - Enrolled (
  - Care Management - Enrolled/C
  - Ca
  - Ca
  - Ca
  - Ch
  - He

Service Detail: Selected

- Care Coordination
  - ACT - MH Specialty

**5. Consider expanding number of recipient names to be displayed**

**6. Click Search**

Limit results to 50

- Recipient Related data is refreshed weekly and all other sections are refreshed monthly.
- Search uses "OR" criteria within a list and "AND" criteria between lists.
- \*To select multiple options within a list, hold down "CTRL" while making additional selections.

< Modify Search

# 79 Recipients Found

View: Standard



[Provider Specific] Provider: Main Street Clinic

AND [Any Provider] Service Setting: ACT - MH Specialty

Search results can be exported to PDF or Excel

Review recipients in results carefully before accessing Clinical Summary.

Maximum Number of Rows Displayed: 50

Name	Medicaid ID	DOB	Gender	Quality Flags	Managed Care Plan
<a href="#">QUNFVaVETm TqnHQQ SQ</a>	WbMmMpa mNrl	N8yoM8ynO TYr	R6 LQ NTQ	2+ ER-BH, 2+ ER-MH, 2+ Inpt-BH, 2+ Inpt-MH, 4+ Inpt/ER-BH, 4+ Inpt/ER-MH, BH QARR - DOH, Cloz Candidate, HARP No Health Home, POP Cloz Candidate, POP High User, Readmit 30d - BH to BH, Readmit 30d - MH to MH	Healthfirst PHSP, Inc.
<a href="#">QUnMRVbORQ SqVOVrbO</a>	UauoNTam NqM	N8yoMoynO T6s	TQ LQ MpM	2+ ER-Medical, 2+ Inpt-BH, 2+ Inpt-MH, 4+ Inpt/ER-Med, BH QARR - DOH, HARP No Assessment for HCBS, HARP No Health Home, No SUD Tx Engage, No SUD Tx Initiation	UnitedHealthcare Community Plan
<a href="#">QUvERVJTtqu SaVOTabGRVI</a>	WaeoN9 FA			2+ ER-BH, 2+ ER-MH, 2+ ER-Medical, 2+ Inpt-BH, 2+ Inpt-MH, 4+ Inpt/ER-BH, 4+ Inpt/ER-MH, 4+ Inpt/ER-Med, BH QARR - DOH, Cloz Candidate, HARP No Assessment for HCBS, HARP No Health Home, No HbA1c & LDL-C (DM & Schiz), POP Cloz Candidate, POP High User, Readmit 30d - BH to BH, Readmit 30d - MH to MH	MetroPlus Health Plan
<a href="#">QVFVSUvP TUVMVabO</a>	WVMoMpQ nNUQ	MTIIMT2IM TavMA	TQ LQ M96	2+ ER-BH, Adher-AP, No Gluc/HbA1c & LDL-C - AP, No LDL-C - AP, No Outpt Medical, No SUD ER f/u 30d, No SUD ER f/u 7d	
<a href="#">QVJOTqnE SazO</a>	UFYmNDAv MaY	MoynNCynO T6v	TQ LQ MpA	BH QARR - DOH, HARP No Assessment for HCBS, HARP No Health Home, No SUD Tx Engage	Healthfirst PHSP, Inc.

Click on a recipient name to review Clinical Summary

# Identify recipients with any Health Home or Care Management Enrollment or Outreach

1. Go to “Recipient Search” screen
2. Locate the “Service Setting” filter box in the “Services by Any Provider” section
3. Expand the “Care Coordination” service setting by clicking the + sign
4. Click on “Health Home” or “Care Management” “Enrolled” or “Outreach”
5. Consider expanding “Maximum number of rows to be displayed” if needed
6. Click Search

# Recipient Search

Limit results to 50 Search Reset

## Recipient Identifiers

Medicaid ID AB00000A	SSN 000-00-0000	First Name	Last Name	DOB MM/DD/YYYY
-------------------------	--------------------	------------	-----------	-------------------

1. Click "Recipient Search" from top menu options

## Characteristics as of 02/24/2020

Age Range	To	Gender	Managed Care	Children's Waiver Status
Population			MC Product Line	HARP Status
High Need Population			Medicaid Restrictions	HARP HCBS Assessment Status
AOT Status			DSRIP PPS	HARP HCBS Assessment Results
Alerts & Incidents				

## Quality Flag as of 11/01/2019

- HARP Enrolled - Not Health Home Enrolled - (updated weekly)
- HARP-Enrolled - No Assessment for HCBS - (updated weekly)
- Antipsychotic Polypharmacy (2+ >90days) Children
- Antipsychotic Two Plus
- Antipsychotic Three Plus
- Antidepressant Two Plus - SC
- Antidepressant Three Plus
- Psychotropics Three Plus
- Psychotropics Four Plus
- Polypharmacy Summary
- Discontinuation - Antidepressant <12 weeks (MDE)
- Adherence - Mood Stabilizer (Bipolar)
- Adherence - Antipsychotic (Schiz)
- Treatment Engagement - Summary
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (Child)
- No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (All)
- No Metabolic Monitoring (Gluc/HbA1c) on Antipsychotic
- No Metabolic Monitoring (LDL-C) on Antipsychotic
- No Diabetes Screening (Gluc/HbA1c) Schiz or Bipolar
- No Diabetes Medication (HbA1c and LDL-C) Diabetic

## Services: Specific Provider as of 11/01/2019

Definitions

Post 1 Year

Provider

Region

County

Current Access

Service Utilization

Number of Visits

Service Setting:

- Outpatient - MH
- Outpatient - Medical
- Outpatient - Medical Specialty
- Outpatient - SU
- Outpatient - Unspecified
- Practitioner - BH
- State Psych Center Services (Sol)

Service Detail: Selected

2. Locate the Service Setting filter box in "Any Provider" section

## Medication & Diagnosis as of 11/01/2019

Prescriber Last Name

Drug Name

Active Drug

Psychotropic Drug Class\*

- ADHD Med
- Antidepressant
- Antipsychotic
- Antipsychotic - Long Acting Injectab

Non-Psychotropic Drug Class\*

- Analgesics and Anesthetics
- Anti-Infective Agents
- Anti-Obesity Agents
- Antidiabetic

Diagnosis

Diagnosis given 1+

Primary Only Primary/Secondary

BH Diagnosis

- Any BH Diagnosis
- Any MH Diagnosis
- Anxiety Disorders
- Bipolar and Related Disorders

Medical Diagnosis

- Certain conditions originating in the peri
- Certain infectious and parasitic disease
- Congenital malformations, deformations
- Diseases of the blood and blood-forminc

## Services by Any Provider as of 11/01/2019

Post 1 Year

Provider

Region

County

Service Utilization

Number of Visits

Service Setting:

- Care Coordination
- Foster Care
- Inpatient - ER
- Living Support/Residential
- Other
- Outpatient - DD
- Outpatient - MH
- Outpatient - Medical
- Outpatient - Medical Specialty
- Outpatient - SU
- Outpatient - Unspecified

Service Detail: Selected

### 3. Expand the Care Coordination Service Setting

Services by Any Provider as of 11/01/2019

Past 1 Year ▼

Provider

Region

County

Service Utilization

Number of Visits

Service Setting:

Service Detail: Selected

- Care Coordination
  - ACT - MH Specialty
  - Care Coordination Organization (DD Health Home)
  - Care Management - Enrolled (Source: DOH)
  - Care Management - Enrolled/Outreach (Source: DOH)
  - Care Management - Outreach (Source: DOH)
  - Case Management - ALL
  - Case Management - DOH
  - Case Management - OMH
  - Child Waiver Services - OMH
  - Health Home - Enrolled (Source: DOH)
  - Health Home - Enrolled/Outreach (Source: DOH)

3. Expand  
Coordi  
by click

Medication & Diagnosis as of 10/01/2019

Past 1 Year

Services by Any Provider as of 10/01/2019

Past 1 Year

Prescriber Last Name

Drug Name   Active Drug

Psychotropic Drug Class\*

Non-Psychotropic Drug Class\*

Diagnosis

Diagnosis given   Primary Only  Primary/Secondary

BH Diagnosis

Medical Diagnosis

Provider

Region  County

Service Utilization  Number of Visits

Service Setting:

Service Detail: Selected

5. Consider expanding number of recipient names to be displayed

6. Click Search

- Recipient Related data is refreshed weekly and all other sections are refreshed monthly.
- Search uses "OR" criteria within a list and "AND" criteria between lists.
- \*To select multiple options within a list, hold down "CTRL" while making additional selections

Limit results to  50

< Modify Search

3,642 Recipients Found

View: Standard



Search results can be exported to PDF or Excel

[Provider Specific] Provider: Main Street Clinic
AND [Any Provider] Service Setting: Health Home - Enrolled/Outreach (Source: DOH)

Review recipients in results carefully before accessing Clinical Summary.

Maximum Number of Rows Displayed: 50

Table with columns: Name, Medicaid ID, DOB, Gender, Quality Flags, Managed Care Plan. Contains 6 rows of recipient data.

Click on a recipient name to review Clinical Summary

# Identify recipients taking psychotropic or non-psychotropic medication

From “Recipient Search” screen

1. Locate “Medication & Diagnosis” section
2. Type specific “Drug Name” in text box or select from “Psychotropic Drug Class” or “Non-Psychotropic Drug Class”
3. Consider expanding “Maximum number of rows to be displayed” if needed
4. Click Search

**1. Locate "Medication & Diagnosis" section**

**2. Select from a "Drug Class" filter box**

**3. Consider expanding number of recipient names to be displayed**

**4. Click Search**

Medication & Diagnosis as of 11/01/2019

Past 1 Year

Services by Any Provider as of 11/01/2019

Past 1 Year

Prescriber Last Name

Drug Name

Provider

Region

County

Psychotropic Drug Class\*

Non-Psychotropic Drug Class\*

- ADHD Med
- Antidepressant
- Antipsychotic
- Antipsychotic - Long Acting Injectabl

- Analgesics and Anesthetics
- Anti-Infective Agents
- Anti-Obesity Agents
- Antidiabetic

Diagnosis

Diagnosis given 1+  Primary Only  Primary/Secondary

BH Diagnosis

Medical Diagnosis

- Any BH Diagnosis
- Any MH Diagnosis
- Anxiety Disorders
- Bipolar and Related Disorders

- Certain conditions originating in the perin
- Certain infectious and parasitic diseases
- Congenital malformations, deformations ;
- Diseases of the blood and blood-forming

Service Utilization

Number of Visits

Service Setting:

Service Detail: Selected

- Care Coordination
- Foster Care
- Inpatient - ER
- Living Support/Residential
- Other
- Outpatient - DD
- Outpatie
- Outpatie
- Outpatie
- Outpatie
- Outpatie

Limit results to 50

Search

Reset

- Recipient Related data is refreshed weekly and all other sections are refreshed monthly.
- Search uses "OR" criteria within a list and "AND" criteria between lists.
- \*To select multiple options within a list, hold down "CTRL" while making additional selections.

# Example search containing data with special protection: Alcohol Related Disorders

From “Recipient Search” screen:

1. Locate the “BH Diagnosis” box in the “Medication & Diagnosis” section
2. Expand the category “Substance-Related and Addictive Disorders” by clicking the + sign and select the sub-category “Alcohol related disorders”
3. Click Search
4. Search results page will provide:
  - # Total recipients matching search criteria
  - # Recipients excluded from search results (consent required)
  - # Recipients included in search results

**Medication & Diagnosis** as of 11/01/2019

Past 1 Year

**Services by Any Provider** as of 11/01/2019

Past 1 Year

Prescriber Last Name

Drug Name   Active Drug

Provider

Region  County

Psychotropic Drug Class\*

Non-Psychotropic Drug Class\*

- ADHD Med
- Antidepressant
- Antipsychotic
- Antipsychotic

- Analgesics and Anesthetics
- Anti-Infective Agents
- Anti-Obesity Agents
- Antidiabetic

Service Utilization

Number of Visits

Service Setting:

Service Detail: Selected

- Care Coordination
- Foster Care
- Inpatient - ER
- Inpatient - Residential
- Outpatient - Medical Speciality
- Outpatient - SU
- Outpatient - Unspecified

Service Detail: Selected

**1. Locate the "BH Diagnosis" filter box**

**2. Expand "Substance-Related and Addictive Disorders" category and select "Alcohol related disorders"**

**3. Click Search**

Diagnosis given   Primary Only  Primary

BH Diagnosis  Medical Diagnosis

- Sleep-wake disorders (D11)
- Somatic Symptom and Related Disorders
- Substance-Related and Addictive Disorders (1 Dx selected)
  - Alcohol related disorders
  - Cannabis related disorders
  - Cocaine related disorders
  - Drug-induced mental disorders (ICD9 only)
  - Hallucinogen related disorders
  - Inhalant related disorders (ICD10 only)

- Infections originating in the respiratory system
- Infectious and parasitic diseases
- Injuries, poisonings, and other external causes
- Malformations, deformations, and injuries
- Neoplasms
- Respiratory system
- Sexually transmitted diseases
- Systemic diseases
- Unspecified

Limit results to  50

Modify Search

4,123 Recipients Found

View: Standard



BH Diagnosis

Alcohol related disorders

AND [Provider Specific] Provider

MAIN STREET CLINIC

2 Recipients included in search results (Note: This search includes data with special protection; i.e. HIV, Substance use or Family Planning)

4,121 Recipients excluded from search results (consent required)

Maximum Number of Rows Displayed: 50

Name	Medicaid ID	DOB	Gender	Quality Flags	Managed Care Plan	Current PHI Access
RbVFTbRFUm SbVMSUy Tm	UrEqOTMn MFa	MTEIM9aIM TasMm	TQ LQ NTY	2+ ER-Medical, No OUD MAT Initiation - 30d, No Rehab f/u 14d	MetroPlus Health Plan	PSYCKES Consent
SqVMTFa TUFVUaVFT6	TUEtMTImO EQ	NCyoNCynO Tyt	R6 LQ NTI	2+ ER-BH, 2+ ER-Medical, 2+ Inpt-BH, 2+ Inpt-Medical, 4+ Inpt/ER-BH, 4+ Inpt/ER-Med, BH QARR - DOH, No OUD MAT Initiation - 30d, No Rehab f/u 14d, No SUD ER f/u 30d, No SUD ER f/u 7d, No SUD Tx Engage, No SUD Tx Initiation, Readmit 30d - BH to All Cause, Readmit 30d - Medical to All Cause	Healthfirst PHSP, Inc.	PSYCKES Consent

# Streamlined Consent in Recipient Search

# Recipient Search: Streamlined Consent

My QI Report -

Statewide Reports

**Recipient Search**

Provider Search

Registrar -

Usage Reports -

Utilization Reports

## Recipient Search

Limit results to

50

Search

Reset

### Recipient Identifiers

Search in:  Full Database  MAIN STREET CLINIC

Medicaid ID

AB00000A

SSN

000-00-0000

First Name

Last Name

DOB

MM/DD/YYYY

### Characteristics as of 02/24/2020

Age Range  To  Gender

Population

High Need Population

AOT Status

Alerts & Incidents

Managed Care

MC Product Line

Medicaid Restrictions

DSRIP PPS

Children's Waiver Status

HARP Status

HARP HCBS Assessment Status

HARP HCBS Assessment Results

### Quality Flag as of 02/01/2020

[Definitions](#)

### Services: Specific Provider as of 02/01/2020

Past 1 Year

HARP Enrolled - Not Health Home Enrolled - (updated weekly)  
Antipsychotic Polypharmacy (2+ >90days) Children  
Antipsychotic Two Plus  
Antipsychotic Three Plus  
Antidepressant Two Plus - SC  
Antidepressant Three Plus  
Psychotropics Three Plus  
Psychotropics Four Plus  
Polypharmacy Summary  
Discontinuation - Antidepressant <12 weeks (MDE)  
Adherence - Mood Stabilizer (Bipolar)  
Adherence - Antipsychotic (Schz)  
Treatment Engagement - Summary  
No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (All)  
No Metabolic Monitoring (Gluc/HbA1c and LDL-C) on Antipsychotic (Child)  
No Diabetes Monitoring (HbA1c and LDL-C) Diabetes and Schiz  
No Diabetes Screening (Gluc/HbA1c) Schz or Bipolar on Antipsychotic Adults  
No Diabetes Monitoring (HbA1c) Diabetes  
BH QARR - 2018 Quality Incentive Subset Summary  
BH QARR - 2018 Total Indicator Summary  
No Outpatient Medical Visit >1 Yr

Provider

Region

County

Current Access

Service Utilization

Number of Visits

#### Service Setting:

Care Coordination  
 Outpatient - MH  
 Outpatient - Medical Specialty  
 Outpatient - SU  
 Outpatient - Unspecified

#### Service Detail: Selected

### Medication & Diagnosis as of 02/01/2020

Past 1 Year

### Services by Any Provider as of 02/01/2020

Past 1 Year

# Recipient Search: Individual Search

Search for client: Enter recipient identifier(s) and click “search”

- Medicaid ID
- Social Security Number (SSN)
- First name (at least first 2 characters)
- Last Name (full last name required)
- Date Of Birth (DOB)

NEW YORK STATE OF OPPORTUNITY | Office of Mental Health | PSYCKES

De-identify  Settings [Log Off](#)

My QI Report | Statewide Reports | **Recipient Search** | Provider Search | Registrar [▼](#) | Usage Reports [▼](#) | Utilization Reports

### Recipient Search

Limit results to 50 [▼](#) [Search](#) [Reset](#)

Search in:  Full Database  MAIN STREET CLINIC

Medicaid ID	SSN	First Name	Last Name	DOB
ABCD1234				MM/DD/YYYY

# Confirm Correct Match, Select “Enable Access”

[← Modify Search](#)

## 1 Recipients Found



Medicaid ID      ABCD1234

Review recipients in results carefully before accessing Clinical Summary.

Maximum Number of Rows Displayed: 50

Name (Gender - Age) Medicaid ID	DOB	Address	Quality Flags	Managed Care Plan	Current PHI Access	
DOE JANE F - 49 ABCD1234	10/10/1970	12 MAIN ST #5 BROOKLYN, NY 12345		Fidelis Care New York	No Access	<a href="#">Enable Access</a>



# Step 1: Why are you allowed to view data?

Attest to right to access client's Medicaid data:  
Client consent, clinical emergency, or attestation of service

My QI Report   Statewide Reports   Recipient Search   Provider Search   Registrar -   Usage Reports -   Utilization Reports

← Modify Search   **1 Recipients Found**   PDF   Excel

Medicaid ID

Review recipients in results carefully

Maximum Number of Rows Displayed: 50

Name (Gender - Age) Medicaid ID	DOB
DOE JANE F - 49 ABCD1234	10/10/1970

PHI Access for **DOE JANE (F - 49)**

Why are you allowed to view this data?

**The client signed consent**

- Client signed a PSYCKES Consent
- Client signed a BHCC Patient Information Sharing Consent
- Client signed a DOH-5055 Health Home Patient Information Sharing Consent

**The client did not sign consent**

- This is a clinical emergency
- Client is currently served by or being transferred to my facility

Cancel   **Next**

# Step 2: How do you know this is correct person?

Attest that client identity has been verified: Provider attests to client identity or client provided 1 form of photo ID or 2 forms of non-photo ID

My QI Report   Statewide Reports   Recipient Search   Provider Search   Registrar   Usage Reports   Utilization Reports

< Modify Search   **1 Recipients Found**   PDF   Excel

Medicaid ID

Review recipients in results carefully

Name (Gender - Age) Medicaid ID	DOB
DOE JANE F - 49 ABCD1234	10/10/1970

Maximum Number of Rows Displayed: 50

PHI Access

Enable Access

### PHI Access for DOE JANE (F - 49)

How do you know this is the correct person?

Provider attests to client identity

Client provided 1 photo ID or 2 forms of non-photo ID

Identification 1   select

Identification 2   select

BROOKLYN CENTER FOR PSYCHOTHERAPY, INC. will be given access to all available data for 3 years (renews automatically with billed service).

Previous   Cancel   **Enable**   **Enable and View Clinical Summary**

# Clinical Summary Contains All Available Data

< Recipient Search

**QUnMRUui RVJJQqE**  
Clinical Summary as of 12/2/2019



- Brief Overview**
- 1 Year Summary
- 5 Year Summary

Data with Special Protection  Show  Hide  
This report contains all available clinical data.

DOB: M8ynOSynOTav (M9A Yrs)      Medicaid ID: REInMDYqMbY      Medicare: No      Children's Waiver Status: N/A  
Address: MpYvOQ UrRBVEU UazVVEU Mp2mLA QqFUTom      Managed Care Plan: Fidelis Care New York (Mainstream)      DSRIP PPS: Central New York Care Collaborative, Inc. PPS  
Tbai MTMmMpM

Alerts & Incidents • all available		Most Recent
1	Overdose - Opioid (1 ER)	6/5/2019 CROUSE HOSPITAL (ER - SU)
1	Self inflicted Poisoning (1 Inpatient)	5/20/2016 UNIVERSITY HSP SUNY HLTH SC (Inpatient - Medical)

Note: Higher # count totals for Inpatient, ER, and Other settings may represent multiple services in same day

**Active Quality Flags** • as of monthly QI report 9/1/2019

**BH QARR - DOH Performance Tracking Measure - as of 04/01/2019**  
No Engagement of Alcohol/Drug Treatment • No Initiation of Alcohol/ Drug Treatment

**High Utilization - Inpt/ER**  
2+ ER - BH • 2+ ER - Medical • 2+ Inpatient - BH • 2+ Inpatient - Medical

**Readmission Post-Discharge from any Hospital**  
BH to All Cause • Medical to Medical

**Substance Use Disorders - as of 04/01/2019**  
No Engagement in Opioid Use Disorder (OUD) Treatment • No Engagement in SUD Treatment • No Follow Up after SUD ER Visit (30 days) • No Follow Up after SUD ER Visit (7 days) • No Initiation of Medication Assisted Treatment (MAT) for New Episode of Opioid Use Disorder (OUD) • No Initiation of Opioid Use Disorder (OUD) Treatment • No Initiation of SUD Treatment

**Diagnoses Past Year**

**Behavioral Health (2)**      Most Recent: Opioid related disorders • Cocaine related disorders  
Most Frequent (# of services): Opioid related disorders (73) • Cocaine related disorders (22)

**Medical (20)**      5 Most Recent: Other inflammation of vagina and vulva • Trichomoniasis • Abdominal and pelvic pain • Other diseases of biliary tract • Cholelithiasis  
...  
5 Most Frequent (# of services): Cholelithiasis (4) • Other diseases of biliary tract (5) • Superficial injury of head (1) • Abdominal and pelvic pain (3) • Abnormalities of heart beat (2) ...

Medications Past Year	Last Pick Up
Fluconazole • Imidazole-Related Antifungals	11/8/2019      Dose: 150 MG, 1/day • Quantity: 1

# Training & Technical Assistance

# PSYCKES Training

- PSYCKES website: [www.psyckes.org](http://www.psyckes.org)
- Webinars
  - Live webinars: Register on [PSYCKES Calendar](#)
  - Recorded webinars: Posted [here](#) on PSYCKES Website
- PSYCKES User's Guides
  - [www.PSYCKES.org](http://www.PSYCKES.org) > About PSYCKES > Training
  - Each User's Guide explains an individual section of the PSYCKES application

# Helpdesk Support

- PSYCKES Help (PSYCKES support)
  - 9:00AM – 5:00PM, Monday – Friday
  - PSYCKES-help@omh.ny.gov
- ITS Help Desk (Login & SMS support)
  - OMH Employee ITS Helpdesk:
    - 1-844-891-1786; fixit@its.ny.gov
  - Provider Partner ITS Helpdesk:
    - 1-800-435-7697; healthhelp@its.ny.gov

# Enhancements to Consent in PSYCKES

# Client Consent for PSYCKES

There are three possible consent forms that a client can sign for provider/network access to their information in PSYCKES:

- PSYCKES Consent Form
  - New design available
  - 10 languages
- Behavioral Health Care Collaborative (BHCC) Patient Information Sharing Consent
- Department of Health Adult Health Home Patient Information Sharing Consent (DOH-5055)
- For additional information on enabling access to client level data in PSYCKES please [click here](#)
- To view the new PSYCKES consent form design, please [click here](#)

# BHCC Consent Logic

- The BHCC Patient Information Sharing Consent is intended to cover data sharing by and among the BHCC and the providers in the BHCC network
- Checking the box in PSYCKES that the client signed the BHCC Patient Information Sharing Consent for the selected BHCC will:
  - Grant users at your provider agency access to clinical summary
  - Grant users at the selected BHCC access to clinical summary when they use their specialized BHCC PSYCKES Access View
  - Not automatically grant users at other provider agencies access to PSYCKES; each provider serving the client has to check this box in their own PSYCKES view (client only has to sign once)
- Access is granted for 3 years after the last billed service or until the client withdraws their BHCC consent
- If the client withdraws their BHCC consent, the provider agency will also lose their access to the clinical summary
- Withdrawal of BHCC consent is managed in the PSYCKES Registrar Menu > Withdraw Consent

# DOH 5055 Adult Health Home Consent Logic

- Access to PSYCKES by way of a signed Adult Health Home Patient Information Sharing Consent (DOH-5055) only covers staff who work for the Health Home or the CMA program
- In PSYCKES, the DOH 5055 Health Home Consent Form check box option will only be available for:
  - Provider Agencies recognized as a DOH Health Home or CMA, according to MAPP
  - Users who say they work for Health Home Administration or the Care Management program at a provider agency, according to PSYCKES User Role Profile
- Access is granted to the clinical summary in real time and will stay active as long as the clients Health Home enrollment is verified in MAPP system (90 day grace period after entry in PSYCKES)
- Access will expire after Health Home enrollment ends, according to MAPP (access will remain for 90 days after end date)
- PSYCKES User Role profile can be updated under “Settings”