# Streamline Environment Set Up: SmartCare - Behavioral Health

## New Directions Northwest

## V 1.1

### Summary:

The following is the checklist of the different custom objects that are considered when setting up the SmartCare environment for Behavioral Health customers and the decisions made by the customer on which items will be incorporated into their SmartCare environment. The estimated hours of set up is excluding items that are marked as Customize. Customized items will be separately estimated on a Statement of Work.

### Documents:

Indicate if the document will be customized (this includes modifications to the page or RDL), if an Existing document will be used, or if the document will not be used at all within the SmartCare system (NA).

Total Estimated Hours of Set Up: \_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Customize** | **Use Existing** | **NA** | **Document Name** | **From Which Environment (if using existing) or Reason for Not Using (if NA)** |
| X | □ | □ | Assessment | Valley – (exclude from estimate) |
| □ | □ | X | Preplanning Checklist |  |
| X | □ | □ | Treatment Plan | Valley – (exclude from estimate) |
| X | □ | □ | Treatment Plan Addendum | Valley – (exclude from estimate) |
| □ | □ | X | Periodic Review |  |
| □ | X | □ | Transfer | Valley |
| □ | □ | X | Authorization Document |  |
| □ | X | □ | Release of Information | Newaygo |
| □ | □ | X | Advance/Adequate Notice | Need to keep on paper |
| □ | X | □ | CAFAS |  |
| □ | X | □ | Diagnosis | ICD10/DSM5 |
| X | □ | □ | Discharge summary | Valley – (exclude from estimate) |
| □ | □ | X | Health History Document |  |
| □ | X | □ | Prescription |  |
| □ | X | □ | Medication Consent |  |
| □ | X | □ | Client Statement |  |
| □ | X | □ | Other: Individual Progress Note | Valley (without billing diagnosis on document) |
| □ | X | □ | Other: Revoke release note | Newaygo |
| □ | X | □ | Other: Informed Consent | Thresholds – Replace the word ‘Thresholds’ with ‘New Directions Northwest’ |
| X | □ | □ | Other: SU Discharge | TEDs (exclude from estimate) |
| X | □ | □ | Other: SU Admission | Valley (exclude from estimate) |
|  | X |  | Other: FBA/BIP | Thresholds – All 4 documents (unless there is another environment we can pull this from?) |

### Document Signature Validations and Initializations:

Indicate if customer will use existing logic from another customer, will be building this logic custom, or will not use either initialization or signature validations for a document. If building the logic custom indicate the Ace Task number that documents the custom logic.

Total Estimated Hours of Set Up: \_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Customize** | **Use Existing** | **NA** | **Document Name** | **From Which Environment (if using existing) or Ace task if customizing** |
| X | □ | □ | Assessment | Valley with customizations; Ace Tasks #1 & 4 |
| □ | □ | X | Preplanning Checklist |  |
| X | □ | □ | Treatment Plan | Valley – (exclude from estimate) |
| X | □ | □ | Treatment Plan Addendum | Valley – (exclude from estimate) |
| □ | □ | x | Periodic Review |  |
| □ | X | □ | Transfer | Valley |
| X | □ | □ | Discharge Summary | Valley (exclude from estimate) |
| □ | □ | X | Authorization Document |  |
| □ | □ | □ | Release of Information | Valley – standard OR NDN keeping paper |
| □ | □ | X | Advance/Adequate Notice |  |
| □ | X | □ | CAFAS | Core |
| □ | □ | □ | Diagnosis | Core |
| □ | □ | X | Health History Document |  |
| X | □ | □ | Other: Goals/objectives custom document | KW & KH getting estimate |
| □ | □ | □ | Other: |  |

### Service Notes

Indicate the Service Notes that will be used and from which environment if an existing note will be used.

Total Estimated Hours of Set Up: \_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Customize** | **Use Existing** | **NA** | **Document Name** | **From Which Environment (if using existing) or Reason for Not Using (if NA)** |
| □ | X | □ | Service Note | Valley |
| □ | X | □ | Miscellaneous | Core |
| □ | X | □ | Medication Review | Woods – remove incidents |
| □ | X | □ | Psychiatric Evaluation | Woods – remove incidents |
| □ | X | □ | Group Note | Newaygo |
| □ | □ | X | Nursing Note |  |
| □ | □ | X | Acute Services Prescreen: |  |
| X | □ | □ | Crisis Service Note | Reviewed design requirements 1/29/15 |
| □ | □ | □ | Other: Supportive employment service note | TBD – may keep paper |
| □ | □ | □ | Other: Therapeutic foster care service note | TBD – may keep paper |
| □ | □ | □ | Other: Mentor/skills trainer note | TBD – may keep paper |

### Service Notes Initializations and Validations

Indicate if customer will use existing logic from another customer, will be building this logic custom, or will not use either initialization or signature validations for a document. If building the logic custom indicate the Ace Task number that documents the custom logic.

Total Estimated Hours of Set Up: \_\_\_\_\_\_\_\_\_\_ (most are use existing)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Customize** | **Use Existing** | **NA** | **Document Name** | **From Which Environment (if using existing) or Ace Task (If customizing)** |
| □ | X | □ | Service Note | Thresholds |
| □ | X | □ | Miscellaneous | Valley (core) |
| □ | X | □ | Medication Review -- | Valley |
| □ | X | □ | Psychiatric Evaluation -- | Woods |
| □ | X | □ | Multi-Service Note | Newaygo |
| □ | □ | X | Nursing Note |  |
| □ | □ | □ | Acute Services Prescreen: |  |
| X | □ | □ | Crisis Service Note: | Customizing – Ace Task #3 |
| □ | □ | □ | Other: |  |

### Interfaces Set-Up

Indicate the Interface set-up and which environment will be used as reference for set up for the Interface. (This list should not include any Interface set-up specifically identified in the contract as a customization.)

Total Estimated Hours of Set Up: \_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Customize** | **Use Existing** | **NA** | **Interface** | **From Which Environment (if using existing) or Ace Task (If customizing)** |
| X | □ | □ | 270/271 – Insurance Eligibility | State of Oregon |
| X | □ | □ | Lab Orders | Phase II – Interpath lab |
| □ | X | □ | CAFAS | Do not need certification to use |
| X | □ | □ | Other: MOTS |  |
| X | □ | □ | Other: Abila (accounting) | KATIE W checking into |
| □ | □ | □ | Other: |  |

### Billing Document Set-Up – may not know yet

Indicate the 837 and Paper forms needing to be set up for different payers/coverage plans.

Total Estimated Hours of Set Up: \_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **837** | **Paper** | **Other** | **Payer/Insurance** | **Comments Regarding Set Up Needs/Environment to Use Existing From** |
| □ | □ | □ | Medicare: |  |
| X | □ | □ | Clearing House: PH Tech |  |
| X | □ | □ | Clearing House: Office Ally |  |

### Other Set Up/Configuration Settings

Below is a list of other settings which may need to be set up/configured for the customer environment. Indicate those that apply.

Total Estimated Hours of Set Up: \_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Use** | **Don’t**  **Use** | **Custom** | **Customization Name** | **Customization Description** |
| □ | X | □ | Michigan Client Information Settings | Includes QI Reporting tab and Timeliness Tab in Client Information (admin) for state requirements |
| □ | □ | X | Client Information: Custom Fields | Ace Task #2 |
| □ | X | □ | Communication with CM/PA | Indicate a line for each piece of information needing to be passed from SmartCare to the Care Management/Provider Access systems, the  Ace task, and which environment this logic should be used from if applicable. |
| □ | □ | X | Inquiry | Valley with customizations; Ace Task #4 |
| X | □ | □ | Client Messages to Display in Client Record | Messages associated to a client record will appear in the Client Messages banner in the client tab. |
| X | □ | □ | Authorization Set up | Indicate if using authorizations in the system. And if using an existing customer model, indicate the model (i.e. Michigan, Threshold or Harbor model). Indicate the Ace task associated to this set up. |
| X | □ | □ | General Ledger Mapping | Need to determine the type of GL report the customer will use, establish mapping for the report/logic, set up SQL custom tables, and SA’s need to be worked with to set up the report to run and test. |
| X | □ | □ | Group Notes | Valley |
| □ | □ | X | Peer Record Reviews | Use of the peer record review functionality includes setting up of templates in the system for the record reviews and setting up review for users. |

### Jobs Set Up

To be used to define the Jobs to be Set Up in the environment.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Custom** | **Use Existing** | **NA** | **Job Name** | **Job Description** | **Existing Environment** |
| □ | X | □ | Service complete Jobs (two – one for service completion and one for marking charges ready to bill) | Used in SC for nightly run of services to set as charges that are ready to bill |  |
| □ | □ | X | csp\_jobUpdateRetroactiveCapitatedCoveragePlanChanges | MI customer auth set up – finds authorization documents missing coverage plans and associates a coverage plan. |  |
| □ | X | □ | ssp\_SCUpdateStaffReportsTimelines | Updates the Services widget in SC |  |
| □ | X | □ | csp\_SendNotifications - 15 Mins | Used to send the notification associated to a document |  |
| □ | □ | X | csp\_CMManageProviderClientsForMHAll | Creates client records for providers in CM/PA when there is an authorization entered |  |
| □ | X | □ | Other: Reallocate billing and to re-reallocate back after | Marji approved cost |  |
| X | □ | □ | Other: Job to track services that are 8 min or round up to bill for weekly services |  |  |

Total Estimated Hours of Set Up: \_\_\_\_\_\_\_\_\_\_

## Customer Sign-Off

Customer signature indicates acknowledgement of all items being requested based on business process analysis as noted above for Set-Up and those which are customizations. Below is the summary of hours of set up cost for the environment (all items which the customer is not customizing). Items that are marked as Customization will have estimates provided in a Statement of Work for the cost of that specific customization above the set up costs of the environment. Note that additions made on subsequent versions of the document will impact the total set up cost as well as may impact the estimated Go Live Date.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Customer Project Lead Signature Date

|  |  |  |
| --- | --- | --- |
| **Area of Set-Up** | **Estimate of Hours** | **Estimate of Cost** |
| Documents |  |  |
| Document Initializations and Validations |  |  |
| Service Notes |  |  |
| Service Note Initializations and Validations |  |  |
| Interfaces Set-Up |  |  |
| Billing Document Set-Up |  |  |
| Other Set-Up/Configuration Settings |  |  |
| Jobs Set-Up |  |  |
| **Totals** |  |  |