DRAFT – WellSky Provider Guide

Role = **BHDDH Provider or BHDDH Provider Supervisor**

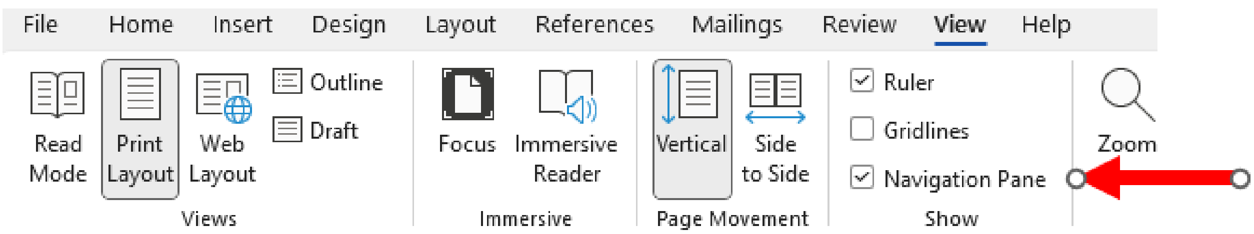
Logging In

Training Link: Training Log In

****Please be sure you are not using the link to Production (where real participant data is entered) when you are training.**

Production Link: Production Log In

<u>Helpful tip for using this Guide</u> – in word, click on **View** and then check the box next to **Navigation Pane**. This will bring up headers outlined in this document on the left-hand side. By clicking on a header, you can jump to different sections of the guide.



A **username** and a **temporary password** will be sent to you through email. Please look for an email from Sindi Terrien, Pam Mazzenga, or WellSky Support. After your first successful login using the temporary password, please update your password. If you need to reset your password or have **any technical problem**, please email: **BHDDH.WellSkySupport@bhddh.ri.gov**

*****Please note**

- The link to the Production environment is different than training link above.
- Usernames in Training and Production are also different.
- Please DO NOT allow your computer to automatically save (i.e. using a vault) your username and password. This often creates problems with logins.
- WellSky functions on pop-ups. Each time you click on something, it will open a new window. For WellSky to work properly, you will need to **disable popups**.
- As a reminder, WellSky is a State Case Management system. It is not meant to serve as a day-to-day case management system for providers. Provider functions in WellSky are limited.

Getting Started

In upper right-hand side, click on the avatar to view your role

Click the drop down to ensure your role = **BHDDH Provider (or BHDDH Provider Supervisor)**

- If you have additional roles, you will be able to click the drop down ▼, select your role and then click **Apply**

Layout

Across the top right, you will see **Chapters** (= My Work, Participants, Providers)

The Chapters you see will depend on your role.

My Work = The My Work page is the first page you will see once you sign in. The page you see will depend on your role and your dashboard will be specific to you.

- Under **CMA/Service Provider** you will see participants open to your agency and that have been assigned to you as the primary worker. In the box, there will be rows based on Status. Click on **Open** (or **Clinically Eligible)** to view a list of participants. From the list of participants, click on participant name (or on a word or number in the row) to open the record.
- Under **Notes**, you will see Notes that have been shared with you. ***More on Notes Below***
    - Click on note status (i.e., **Complete, Pending**) to view a list of notes.
    - Find a note you want to view and click in the row to open the note.
        - Click on headers at the top to sort, if desired (=Participant, Note Type, Note Date, Note By, Status, View Record)
        - Click **View**, under View Record column to open participant record. **Record will only open if participant is open to your agency**.
        - If you **Mark as Read** (once in the note, click <u>Tools, Mark as Read</u>), it will remove the note from your My Work page (see more info below).

Participant – see all participants enrolled with your agency (all eligible for Medicaid /LTSS)

*If you just opened a participant record, then click on My Work or Provider and then click back on Participant, it will bring you back to the last participant record you had opened.

- If you want to find someone, you will need to **Search** using the magnifying glass to the right of the Participant Chapter or the **Filter** feature under File

Providers – Shows information about your provider agency.

- Click on **Provider Chapter**, top right
- Click on the row that shows your Provider name
- Additional tabs will show at the top middle (Providers, OpenClose, Workers, etc.)
- Click on **Enrollments** to see a list of all participants enrolled in your agency
- Provider Chapter is where you will add information/update information regarding residential placements. See below for more information.

Also, at the top right (next to Chapter)

Bell Icon– shows any notifications you may have

Magnifying glass = Search Function

You can search for records using either a **Quick Search** (=click on magnifying glass) or an **Advance Search** method.

Quick Search -

- In the **Quick Search** box (=clicking magnifying glass), enter search criteria you have available such as a participant name.
- Change the drop-down menu to select the **Chapter Menu** you want to search, such as Participant or Provider. This drop down will be limited to showing only those chapters available to you according to your role.
- Use the F**ilter Menu** on the right-hand side, to the left of the chapter menu drop down. Use this drop down to select additional search criteria. The drop down has several options such as last name, DOB, etc.
- Once you entered your information and selected your filters, click the **Search** button to run the search. Results of your search will appear once the search is complete.
- You can sort each heading by clicking on the heading title.

Advanced Search –

- An **Advanced Search** may be completed when you want to narrow your search down. You can perform an Advanced Search by clicking the Advanced Search link to the right of the search button.
- The **Filter Box** opens, allowing you to narrow the search by specifying one or more fields to search.
- You may see drop down menus that indicate specific search requirements (operators) such as ‘contains’, ‘begins with’, ‘and’, ‘any’ and more.

- There are also many filter options to select from, such as last name, first name, SSN, DOB, and more.
- You can specify multiple criteria in the filter by using the **Plus (+)** sign to add more criteria.
- You can add additional search filters by using '**AND**' then adding another filter in the row below.
- You can then use the **close (X)** button to remove that row or clear all your filters by using **Reset**.
- Once you have the information you want to use to search with, click the **Search** button.

Helpful Hint –

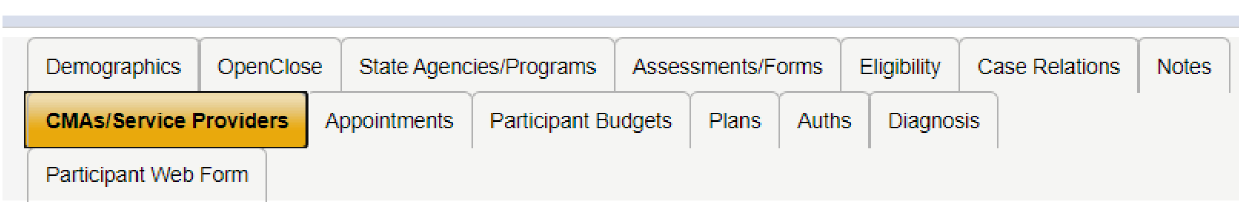
- It may be best to search using the <u>least number of characters</u> required (three) and an additional identifier.
- If someone has something in their name that could make searching difficult (hyphenated or two last names, an apostrophe, is a Jr) try entering three letters (after any apostrophe) and using the **contains** operator.
- For example, to search Silly O'Jilly (DOB: 01/01/1901) try searching
    - Last Name – Contains - JIL AND
    - First Name - Contains - SIL AND/OR
    - DOB = 01/01/1901

Participant Chapter

Select the participant record (by using search feature or through My Work page)

Upon opening Participant record, participant name will show on left side. Upon opening pages within record, name will show on right side.

Once the record opens you will see Tabs (starting with demographics) under participant's name



Demographics – <u>View Only</u>

1. This tab will provide participant demographic information.
2. The address listed should be the participant's **physical** address.
3. If there are additional addresses that have been entered, such as a mailing address, different from the physical address entered on the main face page, you will be able to view by clicking **Edit**, and then click on **Edit Demographics**

    a. **Currently, there is no way to indicate whether a participant has multiple addresses.
    b. Although you are clicking Edit, this doesn't allow you to edit any information.
4. Click **Addresses** on left side menu
5. If there are additional addresses, they will show in a row(s).
6. Review address records and click on a row to view more information
7. To view additional phone numbers for the participant, clicking **Edit**, and then click on **Edit Demographics**
8. Click on **Phones** on the left side menu
9. If there are additional phone numbers, they will show in a row(s).
10. Review phone records and click on a row to view more information

***__Please note__: If you notice any changes that need to be made on the demographic tab (wrong spelling of name, an additional address to add, etc.), please inform the participant's CFCM or the state social case worker so that they can make the necessary changes.

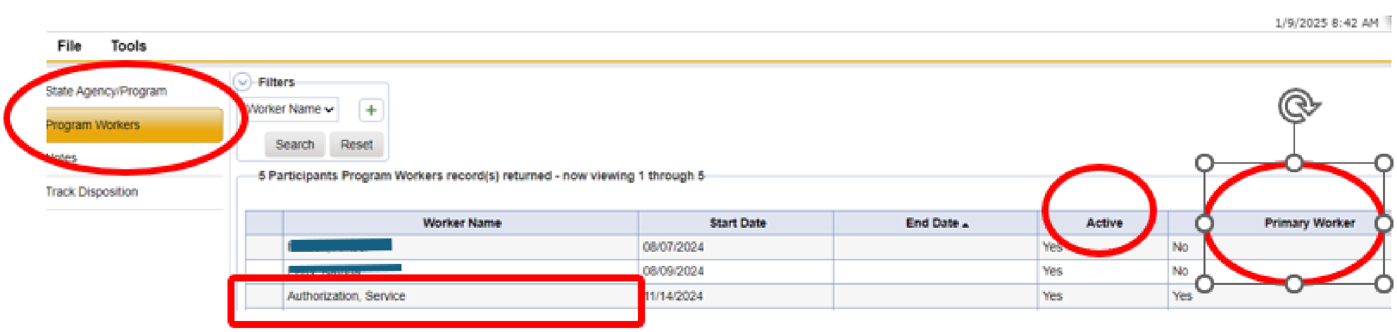
***__Please note:__ Bridges feeds WellSky so information may be different in WellSky vs. Therap.

OpenClose - <u>View Only</u>

1. Information in this tab is not relevant to Providers. Providers may wish to ignore this tab, if it shows.

State Agencies/Programs - <u>View Only</u>

1. Click on the **State Agencies/Programs** tab. In the row(s) that shows below, click on **BHDDH/IDD/HCBS**
    a. This tab indicates whether the participant is open to BHDDH services. All participants that are assigned or referred to Provider agencies should be Open to BHDDH.
2. In this section, you can see the following information:
    a. The participant's **SIS-A Tier** level and dates of scheduled SIS Interviews (past or future).
    b. **Residential** information such as approved settings
        i. You will only see information for those participants that have new Residential Needs
    c. **Youth in Transition (YIT)** information such as status
        i. Currently not in use
3. On the left side menu, click **Program Worker** to view current or past assigned state program worker(s).
    a. Under Active column, you can view active workers (=Yes)
    b. Under Primary Worker column, you can view the participant's primary worker (=Yes)



i. **Authorization, Service** may be listed as the primary worker. This indicates that the participant has moved to a Conflict Free Case Manager.

ii. **Independent Facilitator, [Name of IF]** may be listed as primary worker. This indicates that the participant has been assigned to an IF.

***NOTE**: IFs are not currently in WellSky.

***If you have questions about who to contact**, please email: BHDDH.CFCM@bhddh.ri.gov

Assessment/Forms – View Only

1. Click on this tab to view additional information, assessments, and forms including:
   a. BHDDH Additional Participant Data (participant data that migrated from Therap such as mobility, eating guidelines, supervision, etc.)
   b. BHDDH Employment and Earnings Reporting (Internal)
   c. BHDDH Residential Needs Assessment
   d. BHDDH Residential Situations Assessment

Eligibility – View Only

1. This tab provides information regarding the participant's Medicaid eligibility.

Case Relations – View Only

1. This tab provides information of individuals that have a relationship with participant (for example, mother, brother, lawyer, primary care physician, etc.). This includes those individuals named as **emergency contacts**.
2. Click on the **Case Relations** tab
3. A list of individuals associated with the participant will be listed in the table below. Information including name, relationship, contact information and whether the person is active and/or an emergency contact may show.
4. Click on the name of the person to view any additional information entered.

***Please Note:** If changes or updates need to be made, please contact the current CFCM or state social caseworker.

Notes

For notes related to **submitting ISP/PCP**, **referrals** and **secure communication** see separate section.

In notes, Providers are specifically able to:

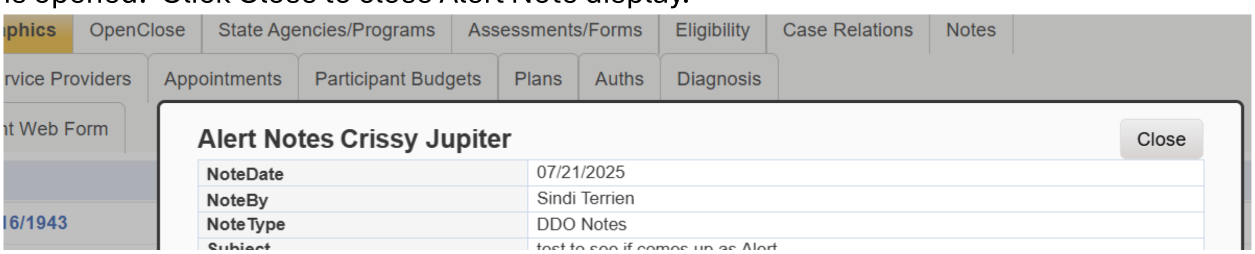
View existing notes

1. You will only be viewing existing notes for participants enrolled in your agency.
2. To view a note, click on the **Notes** tab in the participant's record
    a. Click on the note
        i. Click on headers at the top to sort, if desired (=Note Date, Note By, Note Type, Note Subtype, Description)

***Please note**: **SIS Summary Reports** can be found as an attachment in Notes

a. **Note Type** = SIS
b. **Note Subtype** = SIS Summary Report
c. Upon opening note (click in the row), click on SIS Summary Report in **Attachments** blue hyperlink).
d. A download box will pop up in the right-hand corner. Click **Open File** to view attachment.

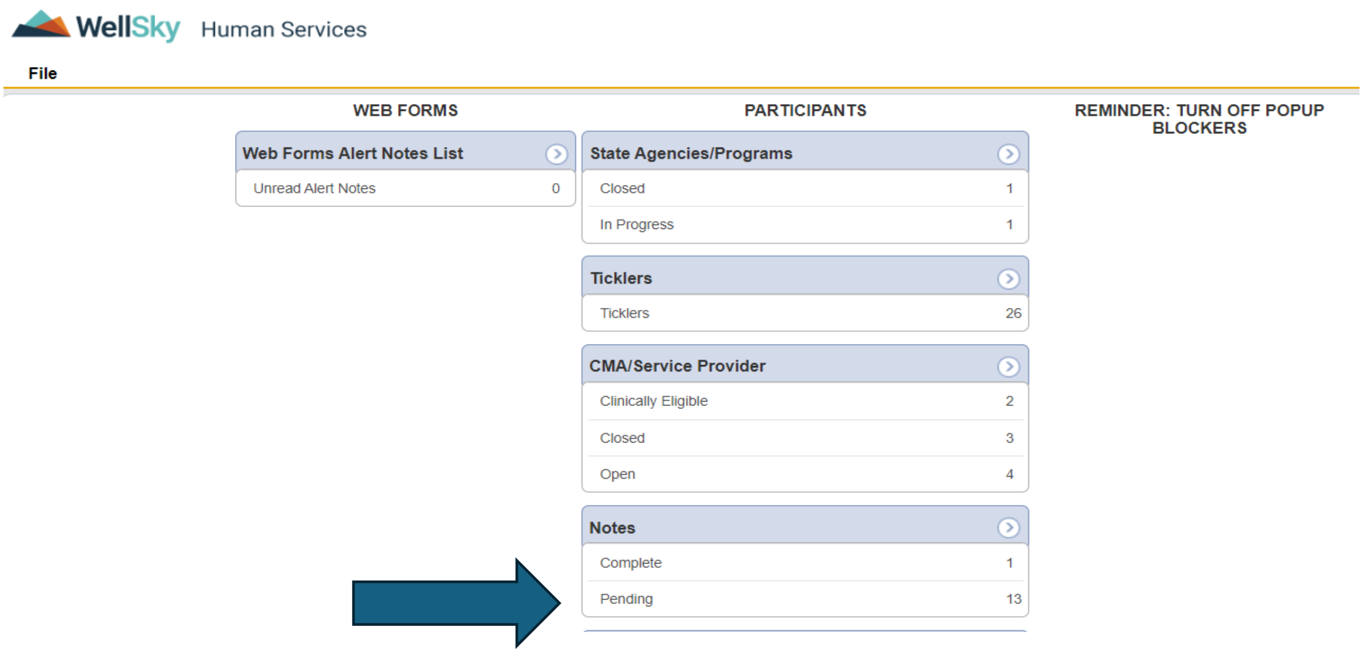
3. Alert Notes may be added to a record to share important information that every user may need to know about the participant. Alert notes will show as soon as the record is opened. Click Close to close Alert Note display.



Example of Alert Note from fake participant in WellSky Training.

Receive/View a note that was shared with you and respond

1. **Notes** that are initially shared with you will show as a **Pending or Complete Note** on your My Work Dashboard



2. From My Work dashboard, under the **Notes** section, Click **Pending** (or other status)
3. All Pending Notes will appear in the table. Select a Pending Note to open and view details
4. **Note Type** will provide information regarding the type of communication (for example, Documentation, etc.).
    a. Note may include a note to review planned services (replaces PO). This **Note Type** = BHDDH DDO Note and **Note Subtype** = BHDDH Provider Planned Service Review.
5. In the gray section, below description, will be communication between recipients.
6. You can respond or add to the communication in the white box labelled Note, under **New Text**.
    a. If note type = Person Centered Planning and Subtype = Provider Planned Service Review, please add note to acknowledge and agree to planned services entered in plan.

*** **Please Note**: You are only able to add/respond to a Pending Note. Complete Notes will be view only.

7. Enter your response and then click the **Append Text to Note** bar below the New Text box. **Caution:** If you don’t click the Append Text to Note bar, the system will not save your response.
8. This action pushes the text you added into the gray box, indicating your message has been added.

*** **Please Note:** This does not save the text you appended. You need to go to **File – Save Note** to save the text you added.

9. Keep the Status as **Pending.**

***__Please Note:__ **<u>Never</u> click Confidential**!

10. To add a recipient to the note, click **Lookup** under **Note Recipients**, next to **Add Note Recipient**.

***__Please Note__: Only those listed in note recipient grid with <u>note status = Unread</u> will receive the message. If you want the person who added you to the note to see your response, please be sure their name is listed in the Notes Recipient Grid.

***Also, if a recipient has <u>marked the note as **Read**</u>, then they will no longer see a Pending Note in their My Work chapter. You will need to <u>add them again as a recipient</u> for the note to show under Pending Notes in My Work chapter.

11. In the **Search Text** box, enter at least the first three letters of the recipient's last name
12. Click **Search** and select the recipient form the list of names
13. The recipient's name will now appear in the **Note Recipients Grid**. This grid displays all recipients that will receive the note.
14. Click **File, Save and Close Notes **If you don't save, the message will be lost.**

***__Please Note:__
Note By shows the <u>individual that initially authored</u> the note and not necessarily the person who shared the note last.
Note Date shows the date the note was <u>originally</u> created.

*** **Please Note**: If you mark a note as read before a participant is enrolled in your agency, you will **NOT** have another way to get back to the participant record to view the note so please be cautious when marking notes as read.

   a. To mark a note as read, open the note
   b. Click **Tools** (to the right of File), **Mark as Read and Close**

<u>Attach a document to a note (submitting ISP/PCP, plan amendment, and HRC Approvals)</u>

***__Please Note__: This is how you will upload and share a **Person-Centered Plan (<u>PCP/ISP</u>), plan amendments,** and **<u>HRC Restrictive Intervention Approval</u>** in WellSky.

1. Open existing note OR
2. Add a note (File, Add Notes)
3. When Uploading an **<u>ISP/PCP</u>**, please select:
   a. **Note Type** = BHDDH DDO Note
   b. **Note Subtype** = BHDDH DDO Plan Submission
   c. **Description** = [Participant Name] [ISP/PCP] [Dates of Plan]
   d. **Status** = Pending

4. When uploading plan amendment, please use same note type/subtype as above with Note Status = Pending
    a. **Description** = [Participant Name] [Plan Amendment] [Dates of Amendment]
5. When Uploading **<u>HRC Restrictive Intervention Approval</u>** (for reporting purposes, please add as a **<u>separate note</u>** and not as an attachment with the ISP/PCP), please select:
    a. **Note Type = BHDDH DDO Note** and
    b. **Note Subtype = BHDDH HRC Restrictive Intervention Approval** for this documentation submission.
    c. **Description** = [HRC Approval] [Date]
    d. You can add social caseworker to Note, but you don't need to.
    e. **Status** = Complete (status = Complete for HRC Restrictive Intervention Note only. All others will have status = Pending)

5. Under the Note box, there is a section for **Attachments** (to include plan, PO and other supporting documents)

6. Click **Add Attachment** (blue hyperlink)
    a. Click **Choose File**
    b. Select the document from the saved location on your computer
    c. Click **Open**
    d. Complete the **Description** text box
        1. Include helpful information such as [participant name], [date], [what the document/note is about]
        2. For **PCP/ISP** plans, in **Description** field enter: [Name] [ISP/PCP] and [plan dates of ISP].
        3. For **HRC Restrictive Intervention Approval,** in **Description** field enter: [HRC Approval] [Date]
    e. Select the **Category** from the drop-down menu
        1. Select <u>BHDDH Other</u> when uploading PCP/ISP or HRC Approval
7. Click **Upload**
    a. Your attachment will now be listed under **Attachment Grid**
8. To add a recipient to the note, click **Lookup** under **Note Recipients**, next to **Add Note Recipient**.
    a. As of 9/29/2025, when uploading a PCP, add the <u>state review team contact</u> (a list of contacts will be provided).
    b. State review team will respond with approval or denial of plan in Note Text box.
    c. Plans from <u>Independent Facilitators</u> that the Fiscal Intermediary uploads as Note, please add <u>state review team contact</u> as recipient.
9. In the **Search Text** box, enter at least the first three letters of the recipient's last name
    a. Click **Search** and select the recipient from the list of names

    b. The recipient's name will now appear in the Note Recipients Grid. This gird displays all recipients that will receive the note.

10. Click **File, Save and Close Notes. **If you don't save, the message will be lost.**

Receive/Respond to referrals

***__Please note__: Referrals and secure communication will use a **__fake/agency participant__** for communication.

1. Participant with First Name = [Your Agency] and Last Name = [BHDDH or CFCM Agency Name]. For example, communication between West Bay RI and BHDDH would search for participant – <u>West Bay RI BHDDH</u>
2. From My Work Dashboard, under the **Notes** section, Click **Pending**
3. All Pending Notes will appear in the table. Select a **Pending** Note to open and view details
4. For Referrals **Note Type** will indicate **Referral** or **Referral- Residential.**
    - **a.** When receiving **<u>Residential Referrals</u>**, review the information and respond to the recipient with any questions or clarification needed.
        - **i.** **<u>To accept</u>** the referral, please <u>note acceptance in **Note Text**</u> box.
        - **ii.** Add any other relevant notes to the Note text box.
        - **iii.** Add a **Note Recipient** if the recipient isn't already showing in the **Note Recipient Grid** or if the note recipient **status** = **Read**. Once a recipient has marked the note as read, they will not see the Pending Note in My Work unless the participant is added as a recipient again.
        - **iv.** DD staff or CFCM will change note subtype to **Residential Referral Acceptance** if <u>both provider and participant accept</u>.
        - **v.** **<u>To deny</u>** the referral, change the **Note Type** to **Residential Denial**
        - **vi.** **Select the reason** for the denial using the **Note Sub-Type** drop down.
        - **vii.** Add any relevant notes to the **Note** text menu, and add a recipient (if the recipient isn't already showing in the **Note Recipient Grid**)
    - **b.** When receiving a **<u>Referral</u>** (all other referrals than residential), the **note subtype** will <u>indicate the type of referral</u> placed. Review the information (including any attachments such as the Referral Form) and respond to the recipient with any questions or clarification needed.
        - **i.** <u>To accept</u> the referral, <u>note the acceptance in the **Note Text**</u> box along with any additional notes.
        - **ii.** Add a **Note Recipient** (if the recipient isn't already showing in the **Note Recipient Grid**)
        - **iii.** <u>To deny</u> the referral, change the **Note Type** to **Referral Denial**
        - **iv.** **Select the reason** for denial using **the Note Sub-Type drop down** menu.
        - **v.** Add any relevant notes to the **Note** text box, and add a recipient (if the recipient isn't already showing in the **Note Recipient Grid**)

vi. Leave the Note Status as **Pending (DO NOT CHANGE STATUS).** Only CFCM or State will change status once referral is complete
vii. Click **File, Save and Close Notes**. ****If you don't save, the message will be lost.**
viii. Once you received and responded to the referral note using the fake participant you may **mark it as read**.
ix. To mark a note as read, open the note
x. Click **Tools** (to the right of File), **Mark as Read and Close**
xi. **Note:** Mark as Read will allow the person communicating with you to follow up and ensure the appended note shows as a new pending note on your My Work page. If you don't Mark as Read, you will need to go back to the original pending note and continually check for a response.

*Add a Note (with or without attachment), specifically used for **secure communication***

1. Search for Participant with First Name = [Your Agency] and Last Name = [BHDDH or CFCM Agency Name]. For example, communication between West Bay RI and BHDDH would search for participant – <u>West Bay RI BHDDH</u>
2. Click on the **Notes** tab
3. Click **File**, **Add Notes**
4. From the **State Agency/Program** drop down, select **BHDDH/IDD/HCBS**
5. From the **Note Type** drop down, select **DDO Notes**
6. Note Subtype = **DDO Communication** – to use in lieu of S-Comms.
7. **Description** - [Name] [Reason for Note]
8. Under **Attachment**, click **Add Attachment**
   a. Click **Choose File** and select appropriate file from your desktop
   b. In text box next to **Description**, type the same description as entered in Note (ex., [Name] ISP and [plan dates of ISP]
   c. From the **Category** drop down, select **BHDDH Other**
   d. Click **Upload**. You should now see the document listed under Attachments Grid
9. From the **Status** drop down, select **Pending**
10. Click **File, Save and Close Notes**

CMA/Service Providers

1. To View all CMA/Service Providers/Workers
2. Click on **CMA/Service Providers**. You will see a list of all licensed DDOs and Case Management Agencies associated with the participant.
3. To view additional details, including workers assigned to the participant within an agency, click on the agency name in the row
4. On the left menu, click **CMA/Service Provider Worker** to see worker information.
5. To change the Primary Worker for <u>your agency</u>

**Please Note: this function is only available for supervisors in the Provider Supervisor role). Click in the row where you see your agency name.

a. On left side menu, Click on **CMA/Service Provider Workers**
b. Click on **File**, **Assign CMA/Service Provider Workers**
c. Next to **Worker Name**, click **Lookup**
d. In the box to the right of **Search Text**, enter at least three letters of the worker's last name
e. Click **Search**
f. Click on worker name from the names listed
g. Click **File**, and then select **Save and Close Referral Worker**
h. The name should now appear in the table.
i. To indicate the staff is Primary Worker, **check the box** (unmarked in the right most column) at the end of the row
j. Click **Tools**, and then select **Designate as Primary**
k. Click **Close CMA/Service Provider Worker**

6. Enrollment into Facility (group home)

a. In CMA/Service Provider tab, click on Provider Agency line
b. Click on Referral Facilities on left-side menu
c. Click on Facility drop down and select the group home the participant has been enrolled with
d. Start date auto-populates to today. Click on calendar to change.
e. Change status to Pending (pending means the participant is currently living in that group home).
f. Click on Disposition and set to Open
g. Click File, Save and Close Referral Facility

7. **Discharge from Facility (group home)**

a. In CMA/Service Provider tab, click on Provider Agency line
b. Click on **Referral Facilities** on left-side menu
c. Click on **Facility** drop down and select the group home the participant has been enrolled with
d. Click on **End Date** calendar and select the date the participant is discharged from facility
e. Change **Status** to **Complete** (complete means the participant has been discharged).
f. Click on **Disposition** and set to **Closed**
g. Add **Disposition Date**
h. Click **File, Save and Close Referral Facility**

8. **Discharge from your Agency (in addition to notifying DD)**

a. In CMA/Service Provider tab, click on Provider Agency line
b. Change **Disposition** to **Closed**
c. Leave **Closure Type** **<u>blank</u>**
d. Add **Close Date** (day participant was discharged from your agency)
e. In **Outcome** box, please add details reason and information regarding closure.
f. Click File, **Save CMA/Service Provider**

9. On the left side menu, select **CMA/Service Provider Workers**
    a. Click **File, Assign CMA/Service Provider Worker**
    b. Click **Lookup**
    c. In the search bar, enter **BHDDH** (for worker name) and click search
    d. Click on the record returned = **BHDDH, Closed or Case, Closed**
    e. Click **File, Save and Close Referral Worker**
    f. On the line with the newly added worker (BHDDH, Closed), click the (unmarked) box on the right at the end of the row
    g. From the **Tools** menu, select **Designate as Primary**
    h. This makes the selected worker the primary worker
    i. Click on the <u>previous worker(s)</u> listed
    j. Select an **End Date** for the worker
    k. Click **File, Save and Close Referral Worker**

Appointments– View Only

Participant Budgets– View Only

1. This tab provides information about the participant's budget.
2. To view more information regarding a particular budget, click in the row (click on a word or number in the row).
3. Currently, not fully in use.

Plans– View Only

1. Click on **Plan** tab (migrated plans may show in <u>Notes Tab</u> as an attachment)
2. Below you will see any plans associated with the participant.
3. Click on a plan listed in the records listed to view more information
    a. You can sort using the headers
4. Once you have selected a plan, from the left side menu, navigate to view additional information regarding the plan
    a. **Plan information** – provides a general overview of the plan (is like a cover sheet)
    b. **Plan form** – this contains any version of the plan itself. Click on the version you wish to view to see details including goals, important TO/FOR me, Informal Supports, Crisis, and Safety Plans, etc.
    c. **Risks** – any identified risks and objectives associated with the risks

   d. **Planned services** – any planned services details including the provider (if identified), the units, cost and more.
   e. **Plan Notes and Follow Up** – any notes associated with the plan
      i. Includes Note Type = Person Centered Planning
      ii. Note Subtype = <u>Provider Planned Services Review</u>. This is a note send by the CFCM to the Provider to ensure everyone agrees with the details of planned services.
      iii. May include a note with the PO
   f. **Linked budget** – the budget that is linked to the plan.

Auths– View Only

1. This is where you will view any approved service authorizations

Diagnosis– View Only

1. This tab provides information on all diagnoses entered and associated with the participant.
2. If there are additional diagnoses to add or change, please contact the CFCM or state.

Provider Chapter

Reminder, chapters are located from the My Work page in the upper right). Once you click into Provider, your agency should show.

Once the record opens to your agency, you will see Tabs (starting with Provider) under your agency name.

Providers - View only

1. Provides basic/contact information about your agency

OpenClose - <u>View Only</u>

1. Information in this tab is not relevant to Providers. Providers may wish to ignore this tab, if it shows.

Workers - View only

1. Click on tab to view workers associated with your agency
   a. **Active** indicates whether the individual is active as a worker in WellSky
   b. **Provider Worker Active** indicates whether the individual is active as a worker with your agency.

Services - View only

1. Click to view services billed by your agency

Assessments

1. **BHDDH Facility Profile** - Adding a **Facility Profile**
   This is in lieu of Facility Report that was previously sent to Residential Team/Melissa Greenlief on monthly basis.

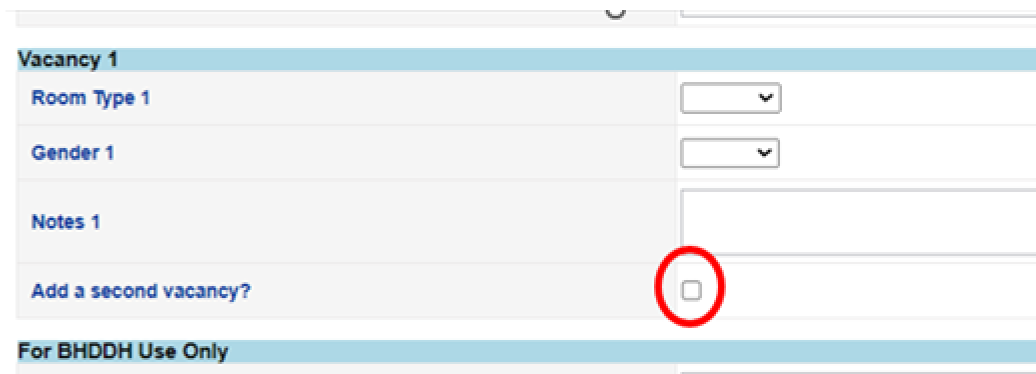
   Facility profile will be updated on a regular basis and is completed for licensed facilities (not SLA, apartments, etc.)

   Please complete the form by entering the current characteristics of the home (who is currently living in home) along with the operating capacity (not licensed capacity).

   a. Click **File, Add Assessment**
   b. Click **Please Select Type** drop down menu and select **BHDDH Facility Profile**
   c. Click **Review** drop down menu and select **As Needed** when setting up the Facility Profile.
   a. Enter **Review Date**
   b. Click **Fund Code** drop down menu and select **LTSS**
   c. Set **Status** to **Pending**
      i. Leave in draft if you are unable to complete the entire form in one sitting. Draft doesn't require you to complete all required fields before saving. Please note, if you leave in draft, it will not show as expected for other users.
   d. Change **Rater** to BHDDH Residential Administrator, Melissa Greenlief.
      i. Click Lookup
      ii. In Search text box, enter Greenlief
      iii. Click Search
      iv. Select Melissa Greenlief
   e. In sections below, complete the **Facility Profile** section based on the current details/characteristics of the group home
      i. **Group Home Name** = enter Group Home Name as shown under Facilities Tab
      ii. Click **Support Needs** drop down and select the type of support needs the group home can accommodate (medical, behavioral, or medical and behavioral)

iii. Click **Shared Bedrooms** drop down and select whether the bedrooms are single, shared or a mix of single and shared.
iv. In sections below, indicate the number of **Total Shared** and/or **Single Bed(room)s**
v. The **Total Beds** will automatically calculate based on the numbers you entered in **Total Shared/Single Bed(room)s**

a. Complete your current vacancy in **Vacancy 1** section
b. If you have additional vacancies within this group home, check the **Add a second vacancy** box. Additional boxes will populate



c. Once the Assessment is complete, click **File, Save and Add Another Assessment** if you need to add another facility
d. One assessment will need to be completed for each Facility/group home your agency has
e. Or click **File, Save and Close Assessment** if you have completed all assessments

Provider ID Numbers - View only

1. Click Provider ID Numbers to show ID numbers associated with your agency such as NPI, MMIS SAK, etc.

Facilities

1. Shows all group homes/facilities licensed by your agency
2. Click on the name of a facility to see
   a. Capacity
   b. Address
   c. Phone number
3. Click **File, Add Facilities** to add information for group home
   a. Complete fields
   b. Click File, Save and Close Facilities

Enrollments – View Only

1. Shows all participants enrolled in your agency
2. Click **View** (blue hyperlink) in View Record column to open a specific participant record

Facilities Management

1. Shows all participants who currently live in a group home
   a. Enrollment/assignment to a group home is a function completed in the CMA/Service Provider tab (in participant chapter)
   b. Discharge from group home can be completed here. This doesn't discharge the participant from your agency. Discharging a participant from your agency is completed in CMA/Service Provider tab (Participant Chapter).
      i. Click on Facility management
      ii. Click into row showing participant (show under consumer column) with disposition open.
      iii. Add End Date
      iv. Change Status to Complete
      v. Click File, Save and Close Program

   ****Note: Status = <u>Pending</u>** = participant is living in group home. **Status = <u>Complete</u>** = the participant has been discharged from group home.

Note Types:

Note Type	Note Subtype	When to use	Which Participant
BHDDH DDO Note	BHDDH DDO Plan Submission	Uploading participant PCP/ISP and any additional documentation related to the PCP/ISP for state to review *Self-Direct uploaded by FI, please add Mary Beth Stevens *For participants who are **not** self-direct, please add state social case worker as note recipient.	Actual participant record
BHDDH DDO Note	BHDDH HRC Restrictive Intervention Approval	HRC Restrictive Intervention Approval used for uploading HRC Restrictive Intervention Approval documentation.	Actual participant record
BHDDH DDO Note	BHDDH Provider Planned Service Review	CFCM is sharing plan for provider to review and acknowledge they have reviewed planned services	Actual participant record

SIS	SIS Summary Report	**View Only** (click on attachment to view)	Actual participant record
BHDDH DDO Note	BHDDH DDO Communication	Sending secure communication regarding a participant	Agency participant record (ex., West Bay RI BHDDH)
Referral	*Varies – subtype will = the service	State or CFCM will use when sending a referral to your agency	Agency participant record (ex., West Bay RI BHDDH)
Referral Denial	*Varies – Subtype will = reason for denial	**Provider will change** Note Type from Referral to Referral Denial and select relevant subtype when denying a referral that was sent. SCW/CFCM may also change note to Referral Denial if participant denies referral with provider.	Agency participant record (ex., West Bay RI BHDDH)
Referral – Residential	*Varies – Subtype may be = type of residential placement referral is for or status of residential referral	BHDDH will send residential referrals to provider. If provider and participant accept referral, BHDDH will **change subtype to Residential Referral Acceptance**	Agency participant record (ex., West Bay RI BHDDH)
Residential Denial	*Varies – Subtype will = reason for denial	**Provider will change** Note Type from Referral-Residential to Residential Denial and select relevant subtype when denying a referral that was sent. SCW may also change note to Referral Denial if participant denies referral with provider.	Agency participant record (ex., West Bay RI BHDDH)