Central Registry OTP Training

Last updated April 2024

Would you like us to record this session?

COLORADO
Behavioral Health Administration

Training Agenda

- Onboarding
- Admitting & Discharging
- Other Features
- Pulling Reports

Training Goals

We hope you will leave this session feeling confident about your ability to use the Central Registry and with a clear understanding of where to go for support when needed.

All linked materials in this session are posted on BHA's website.

What is the Central Registry?	An automated system to admit and discharge Opioid Treatment Program clients built within the CommCare system.
Why does BHA have a Central Registry?	It is federally-mandated that States must maintain an OTP central registry. This automated system reduces client wait times, provider administrative burden and improves system accuracy. People used to have to email the Colorado's SOTA (Ryan Muller) everytime they admitted someone new to an OTP!
Who are users of the Central Registry?	• Colorado OTP staff including admissions/intake, front desk, and data/technology teams to admit and discharge clients. • BHA staff to monitor OTPs and resolve admissions conflicts.
How can users get Central Registry tech support?	For Central Registry support, email cdhs_bha_provider_support@state.co.us, monitored 8am-5pm, Monday-Friday. Central Registry client admission, lock and edit requests are monitored from 8am-5pm Monday-Friday by BHA's OTP program team.
How is this data used?	• Data is used by BHA employees to validate that OTP clients are only enrolled at one OTP at a time to avoid duplicate dosing. • OTP users of the Central Registry can view only the clients enrolled in their OTP and conflicting admissions. • Data in aggregate (non PHI/PII level data) is sometimes used to do analysis on Colorado OTP usage for program improvement.

Key Terms

- **Client:** A participant in an OTP program.
- **User:** Someone who has access to the Central Registry system
- **Lock In:** The client can only visit a specific OTP.
- **Lock Out:** The client cannot visit a specific OTP.
- **Single Clinic User:** A user only assigned to one clinic location, only able to admit and discharge clients from that one location.
- **Multi Clinic User:** A user assigned to multiple clinic locations, able to admit and discharge clients from all of those locations.

User Maintenance

OTP's are responsible for removing access when employees leave or no longer need to access the Central Registry.

- OTPs can assign *multiple* staff accounts.
- Staff accounts can have access to *1* clinic (Single Clinic User) *or multiple* clinic locations (Multi Clinic User) within an OTP.

In the future, there will be admin level OTP accounts that will be able to automatically manage their staff accounts permissions for more efficient on and offboarding.

Getting Central Registry Access

For *new* OTP clinics or locations, please contact Ryan Muller, Colorado's State Opioid Treatment Authority (SOTA) at ryan.mueller@state.co.us to get the onboarding process initiated.

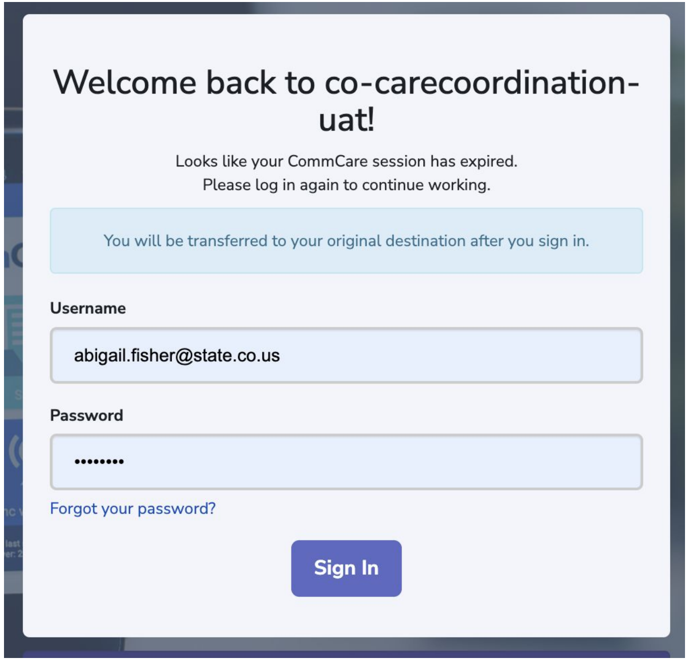
To add or remove users at *existing* OTP clinics and locations, please fill out the Central Registry Access Form.

Logging In

At the start of this session, you should have received an email from the CommCare platform with an invitation to create an account.

📍If you can't find your invitation, start by checking your spam folder! The email would be from sender cdhs_bha_provider_support@state.co.us.

Let the trainer know when you have successfully logged in with a 👍



Two-Factor Authentication (2FA)

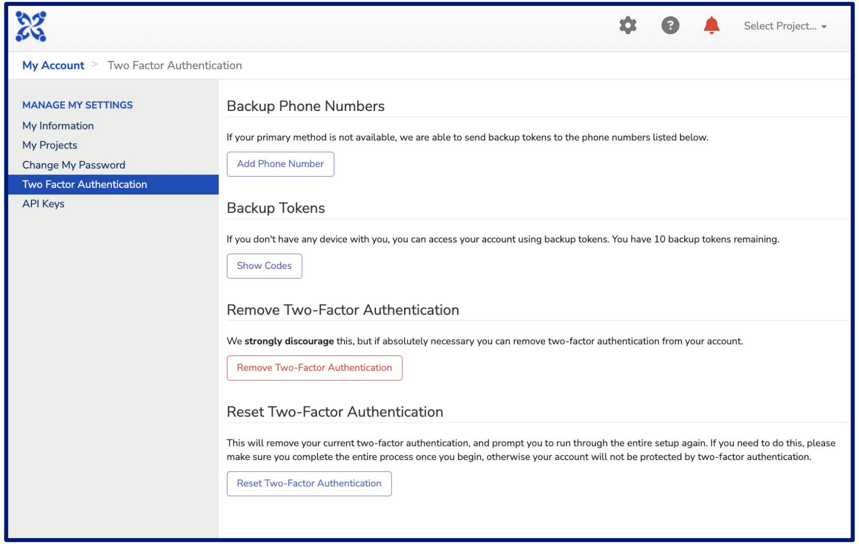
2FA is a measure that strengthens security by requiring two methods to verify your identity (i.e. login credentials and a secondary code). OTP users are required to set up 2FA to ensure the security of this system.

You can choose to use the following options:

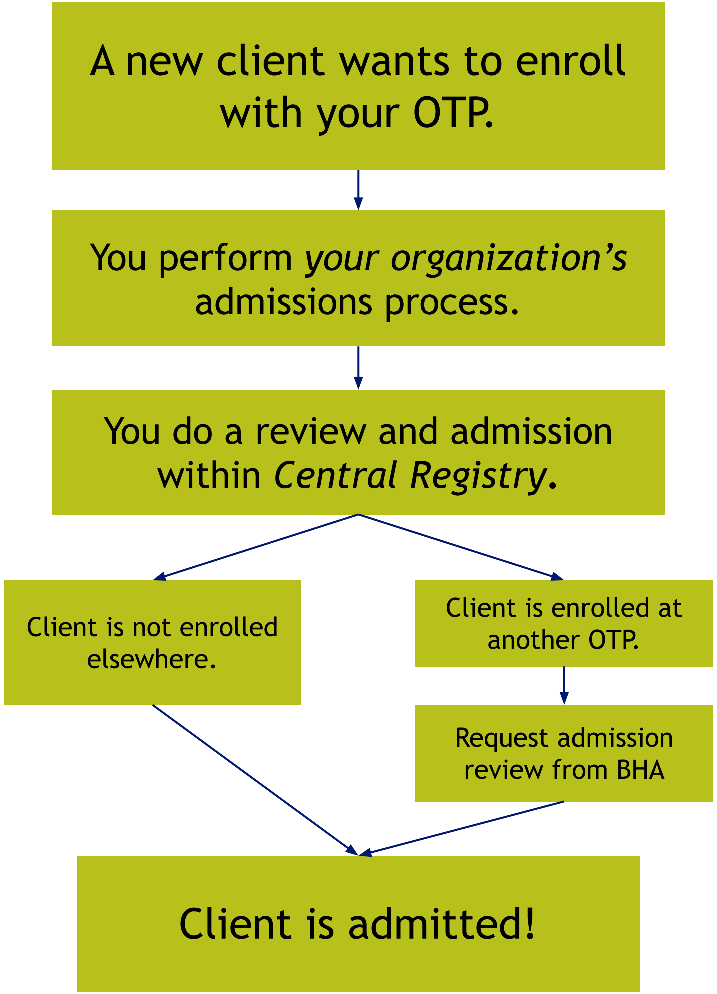
- Google Authenticator app for your smartphone
- Text Message
- Phone Call

📍Each user at your organization should have their own unique login account, no account sharing please!

Let the trainer know when you practiced logging in and out with 2FA with a 👍



At a high level, this is what the process for **admitting** clients with the integration of the Central Registry might look like for your OTP.

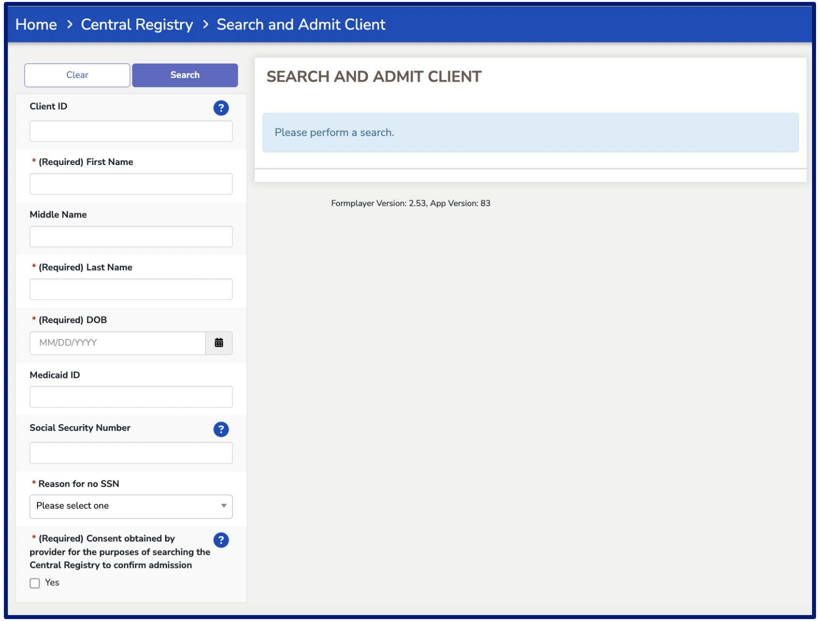


Admit Client

Let’s say you have a new client ready to enroll in your OTP! In addition to your organization’s admissions process, you will also need to search the Central Registry to check if that client is already enrolled at another OTP in Colorado.

You’ll begin by searching for the client using, <u>at minimum</u>, their first name, last name, DOB, and SSN (or the reason the client doesn’t have a SSN) within the Search and Admit Client page.

Admit a new client with a fake test name, we will delete the record after training.

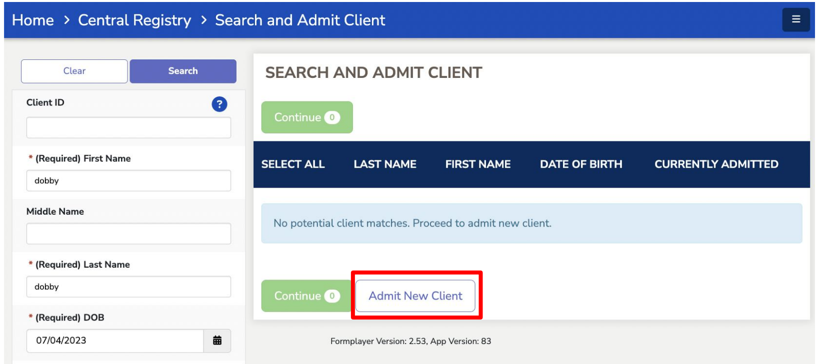


Admit Client

If no results are returned, that means there are no active records in the system that match the information you entered. Then you can select *Admit New Client* and proceed with filling out and submitting that form.

There may be matches to clients with inactive records. In this case, you will select all records and can proceed with the admission.

Check to see if the client was admitted correctly by searching within the Search My Clients page and ensuring that their *Currently Admitted* status is *Yes*.



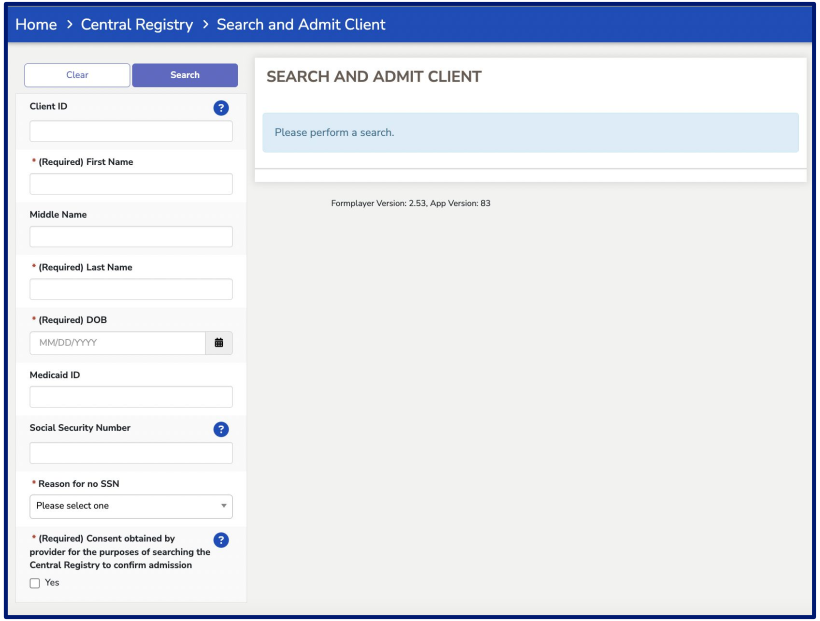
📍The Search And Admit Client and the Search My Clients pages look similar, so make sure you're on the right page!

Admit Client

If results are returned, that means the client might already be enrolled at another OTP or have an active lock status. That means you have a few extra steps to take.

You'll select *Request Admission Review*, review the potential client matches, and submit so that BHA can review the duplication.

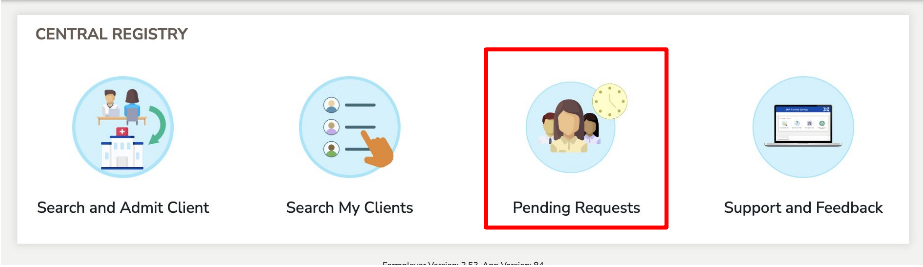
Once the admission is approved or rejected, you will receive an email notification to alert them that a determination has been made.

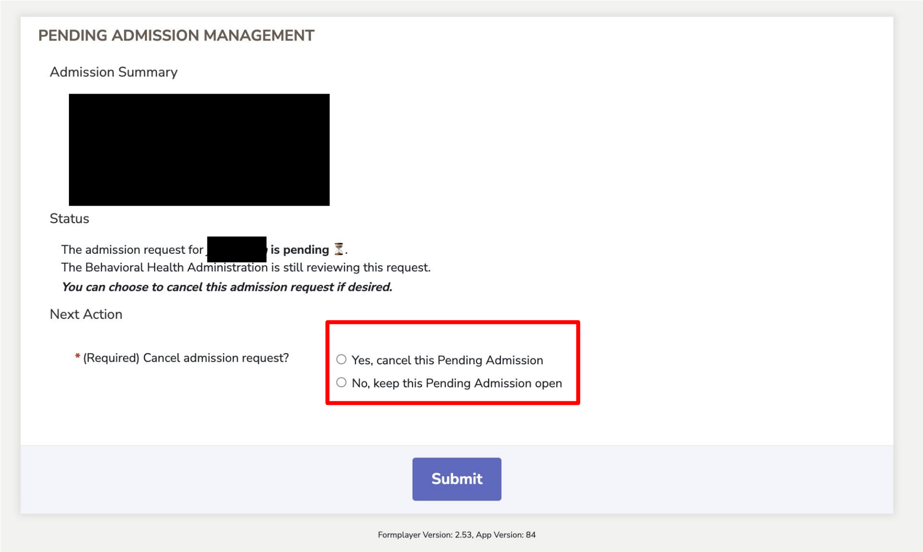


Pending Requests

You will be taken to the Pending Requests page where you can finalize the admission.

You must accept the admission in order for the admission to be recorded in Central Registry.





Response Times

Central Registry requests are monitored from 8am-5pm Monday-Friday. If you are not hearing back, please reach out to cdhs_bha_provider_support@state.co.us.

At a high level, this is what the process for **discharging** clients with the integration of the Central Registry might look like for your OTP.

A client is being discharged from your OTP

↓

You perform *your organization's* discharge process.

↓

You discharge the client within *Central Registry*.

↓

Client is discharged!

Discharging Clients

Let's say you have a client who you are discharging from your OTP. First you will search for the client within the Search My Clients page.

Once you click on the client, you will be taken to a page where you can select Discharge Client.

You can check to see if the discharge went through properly by re-searching the client on the Search My Clients page and looking for the admission status *No*.

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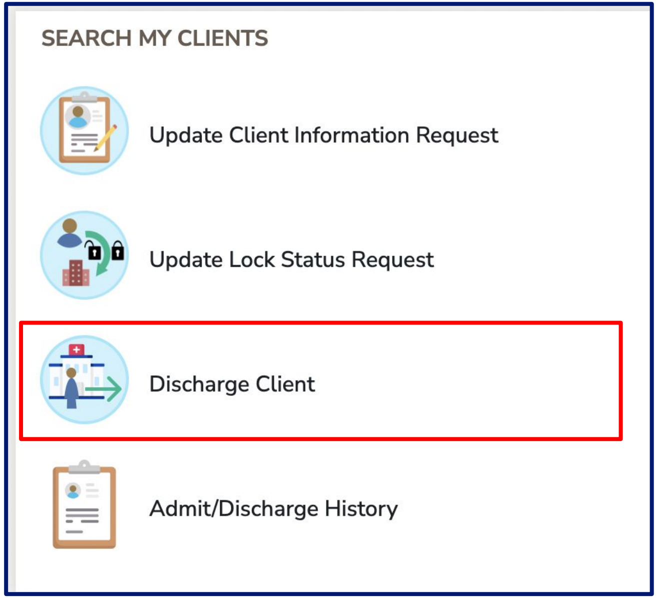

Locking Clients

There may be situations where you need to lock clients in or out of your OTP.

- Lock In: The client can only visit a specific OTP.
- Lock Out: The client cannot visit a specific OTP.

Find the client in Search My Clients and navigate to Update Lock Status Request.

Once a lock status is submitted, BHA has to review the request. You will receive an email of approval or denial from BHA on the submitted lock status for that client. You must approve the update in Pending Requests.

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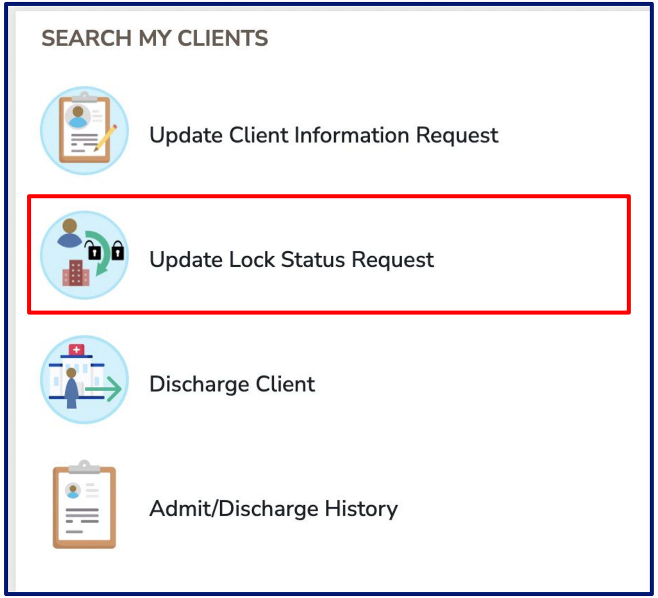

Editing Client Information

There may be situations where you need to edit client information after you initially admit them. To do this, you'll navigate to the Update Client Information Request page, and fill out the necessary information.

The update request will have to be reviewed by BHA, and you will receive an email when that review has been completed. You must accept the change in Pending Requests.

Follow this same process to update the client's Admit/Discharge History, which can be useful if you ever have to make adjustments to your organization's census.

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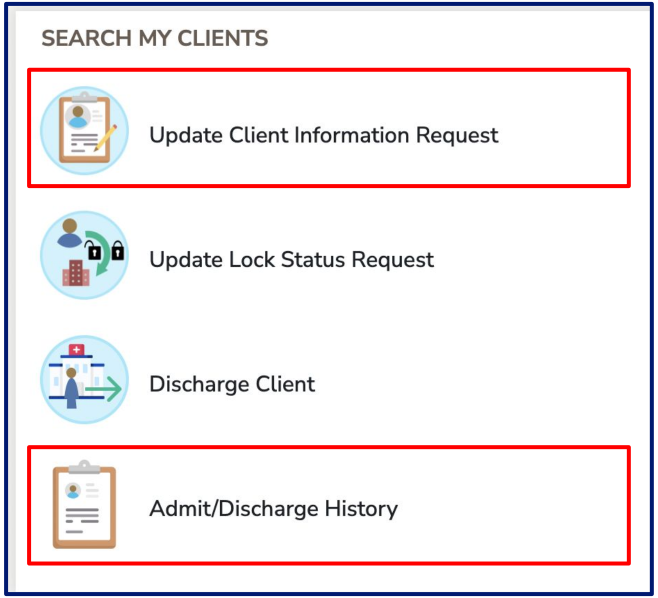


Email Notifications

All users are notified via when a change has been made in the app that requires their attention or for them to take an action. Email notifications will occur in the event of:

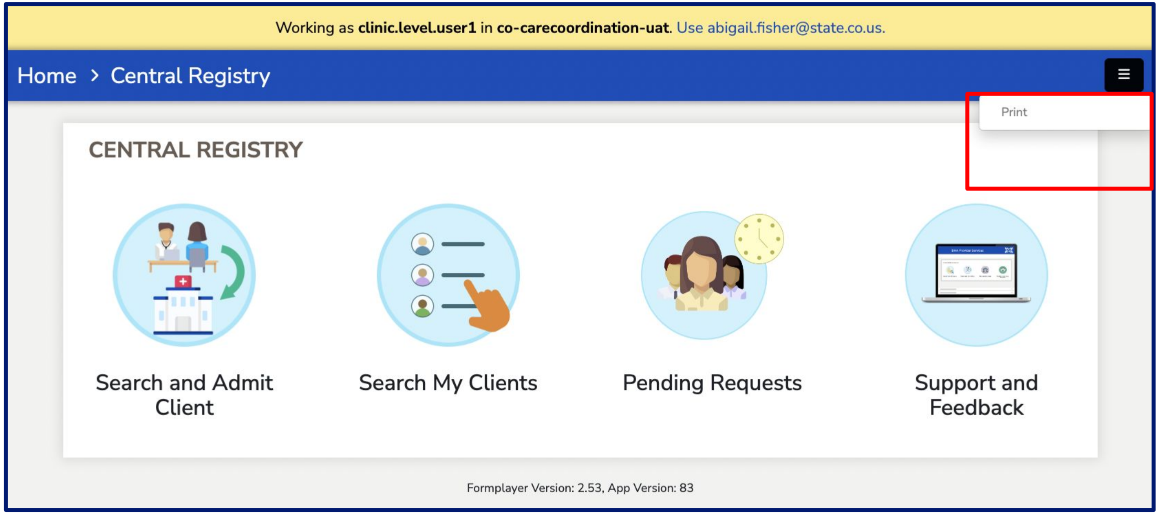
- Client Admission Determination
- Lock Status Determination
- Client Information Update Request Determination
- Update Admission Information Request Determination

Email notifications requiring user follow-up will include a smart link with accompanying instructions prompting the user to take action.

> A admission request was submitted by Aurora Therapy Center LLC - 13th Ave on 9/5/2022, 2:34 PM. Please log-in to BHA Provider Services https://www.google.com/url?q=https://www.commcarehq.org/a/co-carecoordination-dev/app/v1/541f3359a4c642cb9f74db9a692d872b/state_pending_requests/?case_id%3D4ddda8c5-b47c-4d30-903f-0142283b050b&source=gmail-imap&ust=1663007665000000&usg=AOvVaw0qEy3bJkYwKP-X6VyT3WFW to review the admission request.
> —
> Thank you for using BHA Provider Services. If you have any questions, please email CDHS_BHA_Provider_Support@state.co.us

Printing

From the hamburger menu select “Print”. In your print settings you can opt to “Save as PDF” on your computer or to print the form.



Pulling Reports

There are several reports that users are able to pull from the Central Registry. These reports are made from Tableau dashboards within the CommCare platform.

These reports contain tables and graphs that display data related to client admissions, client discharges, and average lengths of stay on a monthly and annual basis.

Users can only pull data from the clinics they are assigned to.

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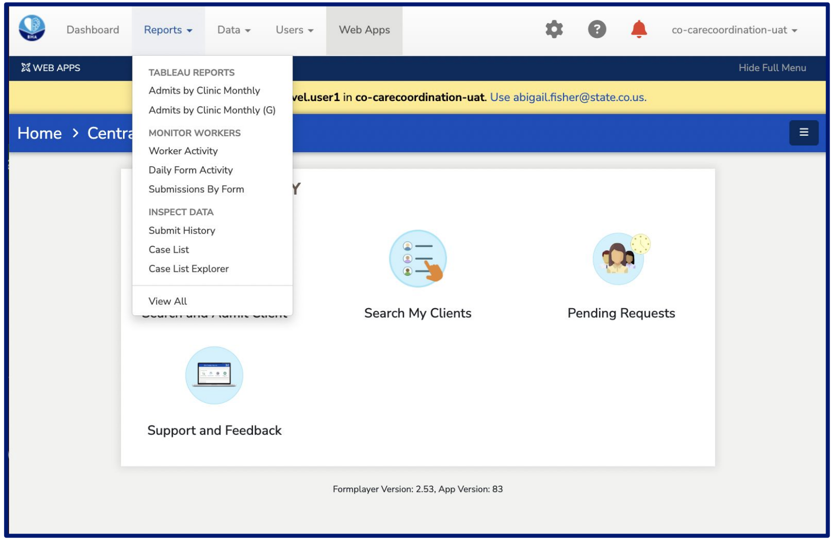

Census Reconciliation

One specific report you may be asked by BHA’s OTP team is to perform a census reconciliation between your electronic records and the Central Registry.

To begin, Navigate to the Reports dashboard, and begin by selecting the “Census by Client” report.

For multiple clinics, you must print off/ run reports for each individual clinic.

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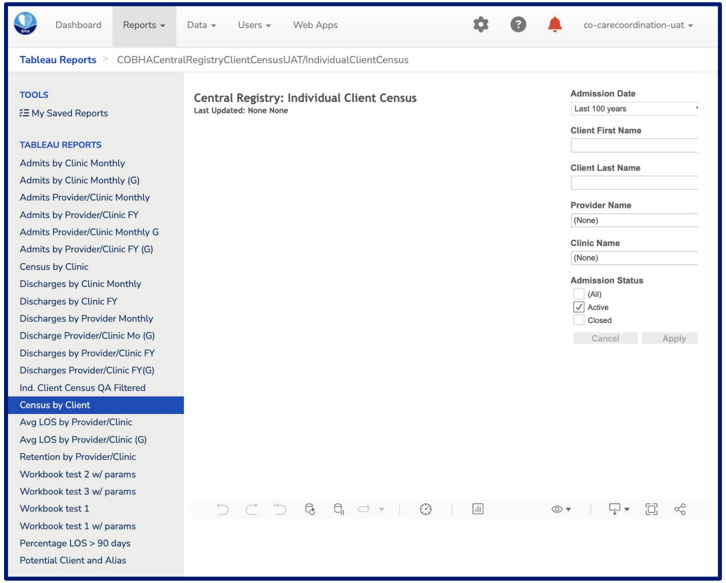

Troubleshooting Time!