

# BH-TEDS Process (SmartCare)

**Refresher  
Training**



**Community**

MENTAL HEALTH

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# Training Session Details

- This **Zoom** training session is being recorded and will be posted on the intranet.
- **Audio:** You need headphones or speakers to hear us, but you will all be muted during the meeting. Adjust your audio volume either in Windows or on your headphones.
- **Q&A:** Ask a question by typing it into Chat. We will monitor the Chat and may answer your question as part of that topic, or hold it until the Q&A at the end of the session.

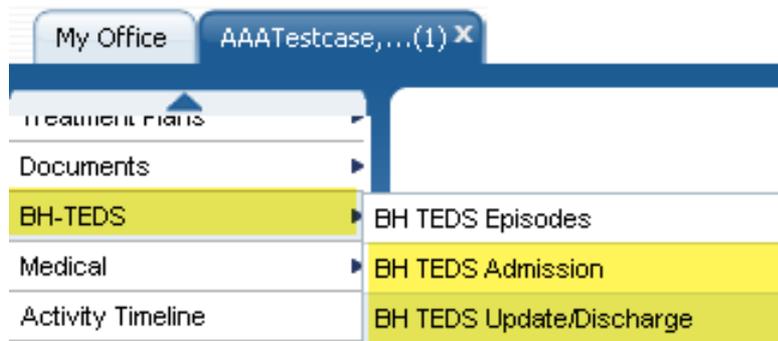
# Training Session Agenda

1. BH-TEDS History and Importance
2. Understanding BH-TEDS Episodes
3. Special Cases
4. Correct BH-TEDS Process
5. Common Issues with Process and Field Entry
6. Q & A

# What is BH-TEDS?

## Behavioral Health Treatment Episode Data Set

- Snapshots of an individual's situation over the course of their care.
- This data gets collected at:
  - Initial assessment/service (**BH-TEDS Admission**) and
  - Annually (**BH-TEDS Update**) as long as the client is receiving services, and
  - At discharge from the agency (**BH-TEDS Discharge**)
- Entered into SmartCare:



# BH-TEDS History

Since implementation on 10/1/2015, the State made numerous changes to the process and requirements for BH-TEDS, which has led to some confusion.

**The good news is that now the process is much simpler!**



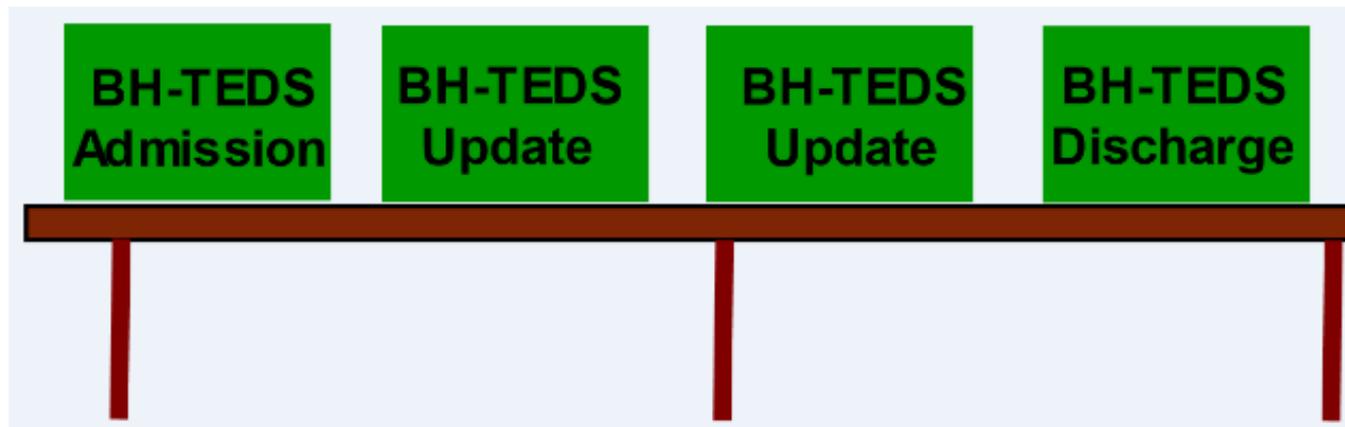
# Why is BH-TEDS Important?

- BH-TEDS is a State and Federal requirement.
- CMHA-CEI is required to submit BH-TEDS records for at least **95%** of clients we serve.
- The state actuary is beginning to use BH-TEDS documents to set rates for services.

# It's Important to Understand the BH-TEDS Process

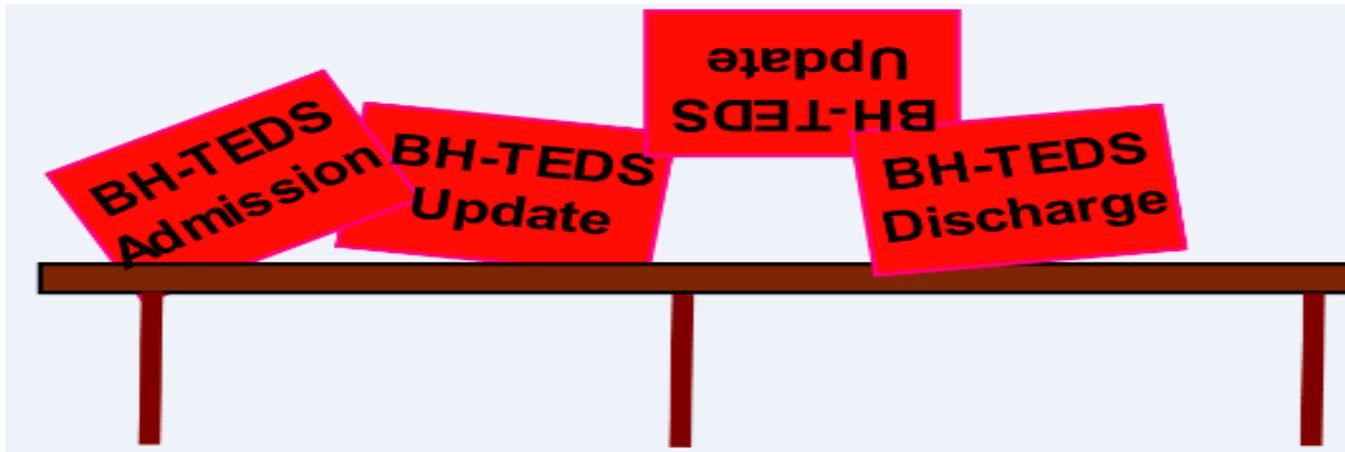
When there are no issues with BH-TEDS documents they are submitted to the State timely, like a smooth conveyor belt.

They are counted towards our 95% contractual requirement and can be used by the State for analysis and possibly rate-setting.



# But...

Any issue with a BH-TEDS Admission or Discharge document stops the conveyor belt and no subsequent documents can be submitted to the State until the problem document is corrected. This may happen even when a document is completed without receiving validation messages.



# BH-TEDS Episodes

A BH-TEDS episode covers all services provided between the BH-TEDS Admission and the BH-TEDS Discharge. The Admit and Discharge are like the bookends for the client's episode of care, with services as *books* in between.





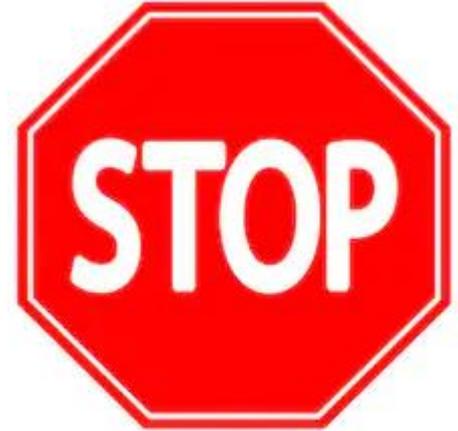
# BH-TEDS Episode Status

- An Episode is **Open** if there is a BH-TEDS Admission, but no Completed BH-TEDS Discharge linked to that Admission.
- An Episode is **Closed** if there is a BH-TEDS Admission and a Completed BH-TEDS Discharge linked to that Admission.
- The BH-TEDS Episode List Page identifies the status:

|                   |                     |                   |                |                    |                     |                       |
|-------------------|---------------------|-------------------|----------------|--------------------|---------------------|-----------------------|
| BH-TEDS           | ▶ BH TEDS Episodes  |                   |                |                    |                     |                       |
| Medical           | ▶ BH TEDS Admission |                   |                |                    |                     |                       |
| Activity Timeline | BH TEDS Update/Di:  | <u>Episode Id</u> | <u>Episode</u> | <u>Record Type</u> | <u>Service Area</u> | <u>Effective Date</u> |
|                   |                     | 3632437           | Open           | MH Admission       | Initial             | 09/29/2017            |
|                   |                     | 3531613           | Closed         | MH Admission       | Initial             | 06/07/2017            |
|                   |                     |                   |                | Discharge          | Initial             | 11/03/2017            |
|                   |                     | 2476554           | Closed         | MH Admission       | Assessment Only     | 04/01/2017            |
|                   |                     |                   |                | Discharge          | Assessment Only     | 04/03/2017            |

# BH-TEDS Episodes are Key

- A client should **NEVER**\* have more than one open episode at a time.
- BH-TEDS episodes can **NEVER**\* overlap.
- Once a BH-TEDS Discharge is completed, that episode is CLOSED and no Update should be entered.



\*The only exception is when one of the episodes is for State Inpatient.

# BH-TEDS Process – Special Cases

It's important to note the circumstances when we would not follow the standard process.

## **COFR** (County of Financial Responsibility)

- We ***must*** enter BH-TEDS records for **Expense COFR** clients (CEI pays for the services that another CMH provides).
- We must ***not*** enter BH-TEDS records for **Revenue COFR** clients (CEI provides the services for which another CMH is financially responsible).

# Special Cases (cont'd):

## Crisis Only

- When a crisis service is provided for a client who does not have an open BH-TEDS Episode, the BH-TEDS Admission Document should be entered with a Service Type of '**Q record Crisis Contact.**' This is considered a stand-alone BH-TEDS *Event* and no Updates or Discharges are allowed and the Episode is considered Closed.
- If the client receives another crisis service within two weeks of a Q-Record, another Q-Record is allowed, but not necessary.

# Special Cases (cont'd):

## Assessment Only

- Use when a client is assessed for services and does not qualify, or opts out without receiving a service.
- If Service Type = 'Assessment Only' or if Type of Treatment Service Setting = 'MH individual receiving assessment, evaluation, or screening only', it means that the client will ONLY receive an Assessment and no other services. A BH-TEDS Discharge is required for the end date / time of the assessment.

# Special Cases (cont.)

## State Inpatient

- This is the only time where a new BH-TEDS episode needs to be created, even if a client already has an open episode.

## Substance Abuse Services

- Many services in the SAS programs are reported by MSHN, not CMHA-CEI. For those services, the BH-TEDS records are entered into a different system. However, if a SAS client receives *any* other service for which CMHA-CEI is responsible for reporting, a BH-TEDS record is also required in SmartCare.

# Regular BH-TEDS Process

1. Client assessed for services → **Complete a BH-TEDS Admission document** (start of BH-TEDS episode)
2. During treatment: Client receives services in multiple programs, enrollments are opened and closed, etc. **Nothing needed for BH-TEDS.**
3. At Annual Assessment → **Complete a BH-TEDS Update document** (fields are updated at this time)
4. At Discharge from Agency → **Complete a BH-TEDS Discharge document** (fields are updated at this time, closes the BH-TEDS episode)
- 1.** Client returns for services → **Complete a new BH-TEDS Admission document** (start of new BH-TEDS episode)

# Before Creating BH-TEDS Docs...

- A red BH flag **BH** means that **action is required**— Either the client is missing a BH-TEDS Admission, or there is an *Assessment Only* Admission and no Discharge.
- Before creating a new BH-TEDS Admission document, check the BH-TEDS Episodes screen to make sure that there is not already an open BH-TEDS episode.
- When adding a BH-TEDS record retroactively, make sure that the date covers all services for the client and doesn't overlap with any other BH-TEDS episodes.

# Most Frequent Process Issues

- A new Admission document is entered when there is already an open BH-TEDS episode.
- A BH-TEDS Admission document is created instead of an Update.
- A Discharge Document is created prematurely.
- An Update Document is completed for a closed BH-TEDS episode.
- The BH-TEDS Field Entry Guide is not followed.

# Assessment-Only Process Issues

- When *Service Type* = '*Assessment Only*', the client should:
  - ✓ Have **not** received other services, and
  - ✓ Have a corresponding BH-TEDS Discharge document to close the *Assessment Only* BH-TEDS episode.
- If client is receiving services and has an *Assessment Only* BH-TEDS Admission document, edit the document and change the service type to '*Initial*.'

# Frequent Field Entry Problems

- If SSN displays as 999##### or 000##### — Select either “Refused to Provide SSN” or “N/A-Does not have SSN.”
- When the Full Record Exception Field is ‘No’ — Do not select ‘Not Collected – Full Record Exception’ for any field.
- LOCUS Scores may not be updated from most recent LOCUS document or Assessment.

# Frequent Field Entry Problems cont.

- Integrated SUD and MH Treatment, Substance Use History, and Dx fields all work together.
  - If there is a SUD Dx on the Dx tab, then there MUST be at least one substance indicated in the *SUD History* section and *Integrated SUD MH Treatment* MUST be 'Co-occurring not receiving integrated care.'
  - If there is NO SUD Dx on the Dx tab, then there CANNOT be any substances listed in *SUD History* and *Integrated SUD MH Treatment* MUST be 'No – Not Co-Occurring.'

# Frequent Field Entry Problems cont.

- *MI/SED Designation* and *Detailed SMI/SED Status* fields work together.
  - If *MI/SED Designation* field = 'No' then *Detailed SMI/SED Status* field CANNOT = 'SMI' or 'SED'
  - If *MI/SED Designation* field = 'Not Evaluated' then *Detailed SMI/SED Status* field CANNOT = 'SMI', 'SED', or 'Neither SMI or SED'
  - MI/SED cannot = 'Not Evaluated' on any BH-TEDS Update/Discharge document

# Frequent Field Entry Problems cont.

- *Employment* and *Income* Fields work together, even for clients < 16 years old.
  - *'Total Annual Income'* is usually based on household income, not that of the child.
  - *'Employment Status'* is based on the child, MUST be *'N/A individual is under 16 years of age'*
  - *'Minimum Wage'* is based on the child, MUST be *'Individual is Not Working.'*

# Resources

Please see the BH-TEDS User Guides and Field Entry Guides on the Intranet:

## IS Information/Streamline Smartcare/User Manuals

 Current location: /IS Information/Streamline Smartcare/User Manuals

Sort By: **Name** | [Date](#)

**Folders:**

- **Files:**

|  |                        |           |
|--|------------------------|-----------|
|  <a href="#">BH TEDS Field Entry Guide FY19 - Updated</a>         | (PDF - Acrobat Reader) | 10/4/2019 |
|  <a href="#">BH TEDS Field Entry Guide FY20 - CRISIS ONLY</a>     | (PDF - Acrobat Reader) | 4/2/2020  |
|  <a href="#">BH TEDS Field Entry Guide FY20 - Non-Crisis Only</a> | (PDF - Acrobat Reader) | 4/2/2020  |
|  <a href="#">BH-TEDS FY20 Crisis Only Q Record Process</a>       | (PDF - Acrobat Reader) | 9/25/2019 |
|  <a href="#">BH-TEDS FY20 Process Changes</a>                   | (PDF - Acrobat Reader) | 9/26/2019 |
|  <a href="#">BH-TEDS FY20 Transition Guide and FAQ</a>          | (PDF - Acrobat Reader) | 10/4/2019 |
|  <a href="#">BH-TEDS User Guide FY20</a>                        | (PDF - Acrobat Reader) | 7/28/2020 |

# FAQ

## Q. What if I wasn't able to collect some fields from the client?

A. The State suggests we make our best guess if we weren't able to collect a field. E.g. For Yes/No questions, if you can't answer 'Yes' with certainty, then select 'No.' The clinician working with the client should be the one making these best guesses.

## Q. To make a change, should I Edit the Admission or create an Update Document?

A. If a field was entered *incorrectly* in the Admission, edit the document to correct. (Except: When an HSW client has an incorrect value in the Living Arrangements field, you should complete an Update document.)

If the status of a field changes, this can be captured at the time of the annual Update. When completing an Update, you must ***review every field and make all appropriate updates.***

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# Your questions?

Please send additional BH-TEDS  
questions to  
**[ISBA@ceicmh.org](mailto:ISBA@ceicmh.org)**

***Thank you!***