



Community

MENTAL HEALTH

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SmartCare

BH-TEDS User Guide FY20

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This document provides a basic description of the BH-TEDS process and should be used in conjunction with the BH-TEDS Field Entry Guide, which explains how to complete each field. **Staff will need to review both of these guides in order to complete the documents correctly.**

Important BH-TEDS Information

Importance of BH-TEDS



It is important that BH-TEDS documents are completed timely and accurately because:

- The State’s actuary uses BH-TEDS data to determine CMHA-CEI’s funding. If a BH-TEDS document is missing or entered incorrectly (incorrect records cannot be submitted to the State), it means less funding for CMHA-CEI.
- It is a Federal and State requirement to submit BH-TEDS records for at least 95% of clients we serve.

Definitions

BH-TEDS stands for Behavioral Health – Treatment Episode Data Set and is meant to provide “snapshots” of an individual over the course of an **Episode of Care**. These “snapshots” are recorded in the four different types of BH-TEDS Records:

- BH-TEDS Admission – Q-Record / Crisis Only: completed when a client does not have an open BH-TEDS episode and receives a crisis service (T1023, H2011, 90839, 90840, or S9484.) See more in the **Special Cases** section.
- BH-TEDS Admission (not Crisis Only): completed when the first billable (i.e., reportable) service (service or claim) is provided.
- BH-TEDS Update - completed at least annually during an episode of care, if the episode lasts at least a year.
- BH-TEDS Discharge - completed when the last billable (i.e., reportable) service is provided. (Except for Crisis Only records - beginning 10/1/19, Crisis Only BH-TEDS records will not have a Discharge record.)

BH-TEDS Episode: One or many services may be provided during a **BH-TEDS Episode of Care**, by one or many programs or providers in the CEI provider network. An episode of care can last one day or multiple years.

A BH-TEDS Episode includes a BH-TEDS **Admission** document and a BH-TEDS **Discharge** document, with annual BH-TEDS **Update** documents if the episode is longer than one year. Here are some examples of complete BH-TEDS Episodes:

Service Length (examples)	Documents that Complete the BH-TEDS Episode
One Assessment (not eligible)	Admission (Assessment Only) Discharge (Same Day as Admission)
6 months	Admission Discharge
3 ½ years	Admission Update Update Update Discharge

Episode Status:

- An Episode is Open if there is a BH-TEDS Admission, but no Completed Discharge linked to that Admission.
- An Episode is Closed if there is a BH-TEDS Admission and a Completed Discharge linked to that Admission.

A **BH-TEDS Event** refers to a single Crisis Only service. Beginning 10/1/2019, a BH-TEDS Admission document with a Service Type of ‘Q Record Crisis Contact’ is considered an **Event** and no BH-TEDS Discharge document can or should be completed.

Service Length	Documents that Complete the BH-TEDS Event
One Crisis Service	Q-Record

Entering BH-TEDS Records in SmartCare



Before you start a BH-TEDS document in SmartCare, you need to confirm the status of the client’s BH-TEDS episodes.

Determining the Status of a Client’s BH-TEDS Episode

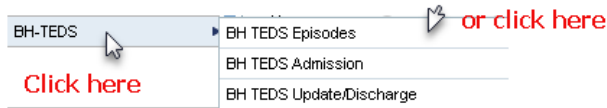
Before you start creating your document it is important to know the status of a client’s BH-TEDS episode in order to determine what needs to be done. There are two easy ways to check on this:

BH-TEDS Flag:

BH The 'BH' flag displays if there is a potential BH-TEDS problem for the client: either the client does not have an open BH-TEDS episode (and it is required for this client), or there is an open BH-TEDS Episode with a Service Type of *Assessment Only*. (See the Special Cases section below to learn why an open Assessment Only episode is a problem.) Hovering over the flag will provide additional information. For more details, you can go to the BHTEDS Episode List Page.

BH-TEDS Episodes List Page:

You can open the BH-TEDS List Page from the Client Banner:



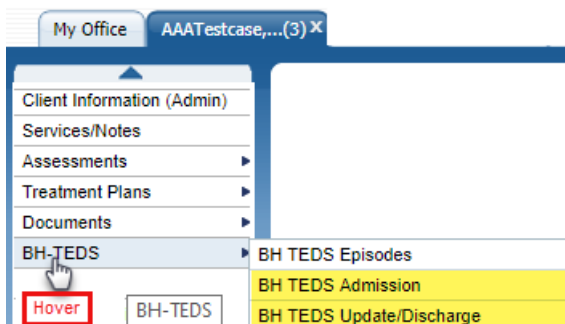
Look at the Episode status to determine if the episode is open or closed.

A screenshot of the 'BH TEDS Episodes (3)' list page. A yellow callout box at the top says 'Three BH-TEDS episodes have been recorded for this client'. Another yellow callout box below it says 'The most recent episode (beginning 4/6/20) is open. The other two episodes are closed.' A table below shows the episode details.

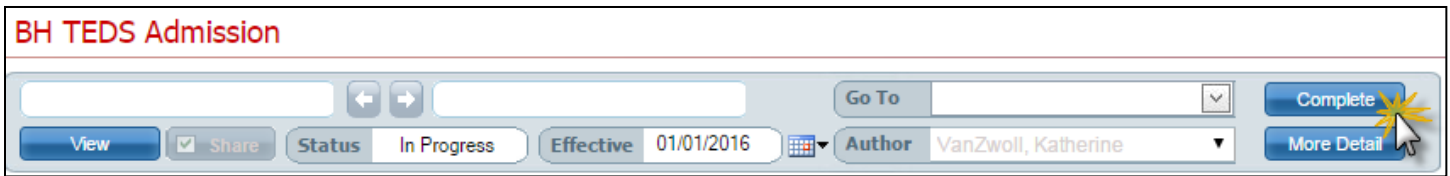
Episode Id	Episode	Record Type	Service Area	Effective Date	Document	Status	Author	Provider	Signature
	Open	MH Admission	Initial	04/06/2020	BH TEDS Admission	Signed		CEI CMH	06/14/20
	Closed	Q	Q Record Crisis C...	11/01/2019	BH TEDS Admission	Signed		CEI CMH	06/14/20
	Closed	MH Admission	Initial	03/14/2016	BH TEDS Admission	Signed		CEI CMH	07/21/17
		Update	Initial	03/30/2017	BH TEDS Update/Dis...	Signed		CEI CMH	04/03/2018
		Discharge	Initial	03/07/2018	BH TEDS Update/Dis...	Signed		CEI CMH	03/14/20

Completing BH-TEDS Documents

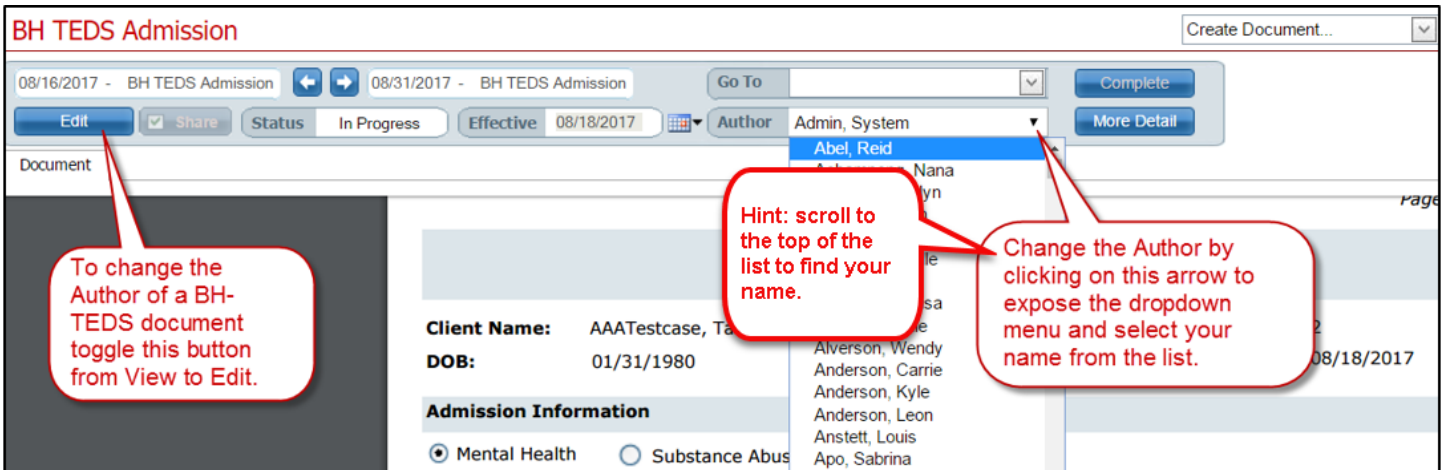
BH-TEDS Documents can be found in the BH-TEDS banner flyout:



Unlike other Documents, BH-TEDS documents do not require a signature, so they can be completed by clinical or clerical staff. Instead of signing, the final step in completing the documents is to mark them Complete by clicking the Complete button.



Any staff member with access to a client may edit and complete a BH-TEDS document generated by another user, by first changing the author to themselves.



All required fields must be complete in order to Complete a BH-TEDS Document. See the **BH-TEDS Field Entry Guide** for instructions on how to select the appropriate options for each field. There is a guide for regular BH-TEDS records and Crisis Only Q-Records.

BH- TEDS (not Crisis Only) Field Entry Guide:

http://intranet.ceicmhb/Intranet_Reference/IS%20Information/Streamline%20Smartcare/User%20Manuals/BH%20TEDS%20Field%20Entry%20Guide%20FY20%20-%20Non-Crisis%20Only.pdf

BH- TEDS – Q-Record (Crisis Only) Field Entry Guide:

http://intranet.ceicmhb/Intranet_Reference/IS%20Information/Streamline%20Smartcare/User%20Manuals/BH%20TEDS%20Field%20Entry%20Guide%20FY20%20-%20CRISIS%20ONLY.pdf

BH-TEDS Process Info

Special Cases – COFR, Crisis Only, Assessment Only, State Inpatient, SAS

These cases may not follow the standard processes identified in the following sections.

- **COFR (County of Financial Responsibility) Clients:**
 - Expense COFR (CEI pays for the services that another CMH provides) – these follow the normal BH-TEDS process. Since CEI is financially responsible, CEI is required to

report BH-TEDS. The board providing the services must provide the information so CEI can complete the appropriate BH-TEDS documents.

- Revenue COFR (CEI provides the services for which another CMH is financially responsible) – the other board must report the BH-TEDS records for this client. CEI should NOT create any BH-TEDS records for a Revenue COFR client, since CEI is not allowed to report these services. However, CEI should provide the necessary BH-TEDS information to the other board so that they can report the records.
- **Crisis Only:** A crisis service (T1023, H2011, 90839, 90840, or S9484) can be included within another BH-TEDS episode, or can be entered as a Q-record / stand-alone event. Crisis staff should check the BH-TEDS Episode List page to determine whether the client has an open BH-TEDS episode.
 - If there is an **open BH-TEDS episode**, the crisis service is already covered and staff should NOT create a BH-TEDS record.
 - If there is **NO open BH-TEDS episode**, crisis staff should create a BH-TEDS Admission document and select a Service Type of 'Q Record Crisis Contact.' No Discharge is necessary. (If the client comes back for services, the program providing the assessment will complete a regular BH-TEDS Admission document.)
 - Alternatively, if Crisis staff are certain that the client will be starting services that day and they are able to collect all BH-TEDS fields, they can create a regular BH-TEDS Admission document (NOT 'Q Record Crisis Contact') to start the episode that will include the crisis service and subsequent services. The episode would remain open until the client is discharged from the agency.

Note: At the time of the crisis service, if a Q-record already exists for the client within the last week, it is not necessary to enter another one.

- **Assessment Only:** If 'Assessment Only' is selected for the Service Type or if 'MH individual receiving assessment, evaluation, or screening only' is selected for the 'Type of Treatment Service Setting' field, it means that the client will ONLY receive an Assessment and no other services. Since only that one service will be provided for the client, the staff member creating the BH-TEDS Admission for the start of the Assessment must also complete a BH-TEDS Discharge document for the end-time of the service.
 - The Assessment Only options should be selected ONLY if the client was assessed for services and did not qualify for treatment, or if the client was assessed and then opted out of treatment.
 - Any time the Assessment Only option is selected in a BH-TEDS Admission document, there MUST be a Discharge, or it was entered incorrectly.
 - The Assessment Only options should NEVER be selected for an Update.

- **State Inpatient:** State Inpatient is the only Type of Treatment Service Setting that requires a separate BH-TEDS episode. Also, that is the only time that it is acceptable for a client to have more than one open BH-TEDS episode at a time.
- **Substance Abuse Services (SAS):** CEI is required to report a BH-TEDS record for all clients that have at least one service that CEI reports to the State. (Also, annual updates are required as long as the client is open and receiving services we report.) Many services in the SAS programs (20000 – 29999) are reported by MSHN, not CEI. If a service occurs in a program that MSHN reports to the State, then the BH-TEDS record needs to be added into the MSHN system (REMI.) However, if a SAS client receives even one service that CEI reports to the State, then a BH-TEDS record also needs to be entered into SmartCare. For example, CEI does not report services in 26105 – CATS GC, but we do report services in 26201 – ES/Jail – Ingham-MH GCB. If a client is ONLY receiving services in 26105, then a BH-TEDS record only needs to be entered in REMI, not SmartCare. However, if that client then receives even ONE service in 26201 (or any other program for which we report encounters to the State), then a BH-TEDS record needs to be entered into SmartCare, also. Presumably, the staff providing the reportable service would note that there was no BH-TEDS episode in SmartCare and complete a BH-TEDS Admission document. If you aren't sure if your program's services are reported by CEI, email ISBA@ceicmh.org with the information and they will check it for you.

At a Client's First Service / Assessment at CEI

When a new or returning client first receives an assessment or other service at CEI, a staff member must determine if the client has an open BH-TEDS episode. Usually this is the responsibility of the clinician providing the service.

- **Yes: Client has an open episode.** This is not expected if the client is new or is returning to services after having been discharged. This could mean that when the client was discharged, the staff responsible neglected to complete a BH-TEDS Discharge document. A BH-TEDS Discharge must be completed before you can enter the new BH-TEDS Admission; otherwise the Admission will be rejected.

Notify the clinician who completed the agency Discharge document or provided the last service that a BH-TEDS Discharge is needed. (This should be effective the last date of service.) After the BH-TEDS Discharge has been completed, create a new BH-TEDS Admission document to begin a new episode of care.

Note: if you need assistance procuring a BH-TEDS Discharge, contact ISBA@ceicmh.org

- **No: Client does not have an open episode.** Complete a BH-TEDS Admission document.

When a Client is Transferred or Referred to a New Program

If a client has already been receiving services at CEI, but begins services in another program, a staff member in the receiving program should verify that the client has an open BH-TEDS episode.

- **Yes: Client has an open episode.** This is expected. Since there is already an open episode, the new program does not need to do anything for BH-TEDS.
- **No: Client does not have an open episode.** A BH-TEDS Admission document is needed. Check with other programs providing services to see if they are just delayed in creating the document. If not, you will need to enter a BH-TEDS Admission document.

Before You Create a BH-TEDS Admission in SmartCare



Check the BH-TEDS Episode List page to make sure that there is not already an open episode before you begin your entry. There is often a slight delay between the time the data gets collected on a Client Data Collection Sheet and the time staff enter the information into SmartCare – sometimes another staff member creates a BH-TEDS Admission document during that time period. If there is an open episode, you should NOT enter another one.

At the Time of a Client's Annual Assessment

A BH-TEDS Update document needs to be completed annually for clients receiving services. Much of the information will copy in to the document; please make sure that the information is accurate or make any necessary changes before marking it Complete.

When a Client Closes Out of a Program

When a client closes out of your program but will continue receiving other services at CEI, you do not need to do anything with BH-TEDS. (The only exception is if the client is being released from State Inpatient but will be receiving other services at CEI – the State Inpatient BH-TEDS episode should be Discharged and the other episode should remain open.)

When a Client Discharges from CEI

When a client stops receiving services at CEI a BH-TEDS Discharge document needs to be completed. This is the responsibility of the last program to provide services and create the Discharge Summary document.

When You Need to Change Information in a BH-TEDS Document

How to change or correct entries in a BH-TEDS document.

- If a value was entered correctly in BH-TEDS, but the **information has changed** for the client, this will be captured at the annual Update or at Discharge, whichever comes first. You do not need to update the record as things change throughout the year. If you do want to update the record, you will need to create an **Update Document**. Please note that when you complete an Update document, you need to re-verify ALL of the fields in the record, not just the field you want to change.
- If a value was **entered incorrectly**, you can fix it by opening the Document and selecting **Edit**. This will create a new version – you can make the correction and Complete.
 - **There is only one exception:** If DHHS or MSHN indicates that a HSW client has an incorrect Residential Living Arrangement value, an Update Document needs to be

created with the corrected value. This is the only time you would do an Update document to correct an entry.

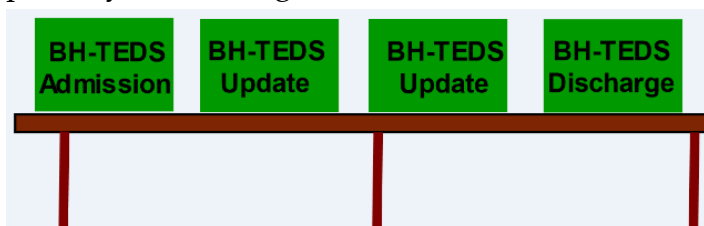
Most Frequent Entry Mistakes that Invalidate BH-TEDS Records



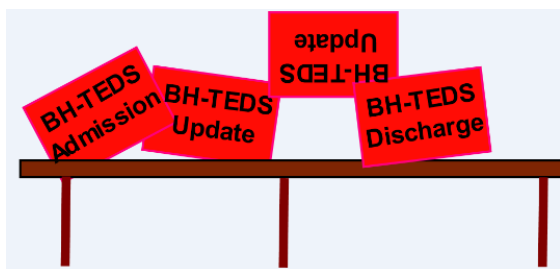
Unfortunately, a number of documents are entered into SmartCare that are never reported to the State (meaning, CEI does not receive credit for them, which could impact our funding) because they are entered incorrectly. Although the documents are marked Complete in SmartCare, they are rejected at the point of submission.

Also, if there is an issue with a BH-TEDS Admission or Discharge document, all subsequent documents will be stuck in the queue – no other documents can be submitted to the State until the problem document is corrected.

When there are no issues with BH-TEDS documents, they are submitted to the State timely. They are counted towards our 95% contractual requirement and can be used by the State for analysis and possibly rate-setting.



When there is an error, it holds up all the BH-TEDS documents behind it and none will get submitted to the State until the issue is resolved.



Here are some of the main problems that prevent BH-TEDS documents from being reported:

- **A new Admission document is entered when there is already an open BH-TEDS episode.** A client can only have one open episode at a time (unless one is State Inpatient) and DHHS will not accept new Admissions if there is already an open episode.) This happens when:

- Someone enters their information without checking to see if there is already an open BH-TEDS episode.
- Someone creates a new Admission document every year for a client instead of an Update.

Note: the above cases result in rejections and errors. IS has to DELETE new Admission documents that were entered for open episodes in order to fix the problem.

- **A BH-TEDS Admission document is created instead of an Update.**
- **A Discharge Document is created prematurely** (when client is closing out of a program but NOT being discharged from the agency.)
- **An Update Document is completed for a BH-TEDS episode that has already been discharged.** A Discharge document means the episode is closed – an Update can only be submitted for an open episode.
- **The BH-TEDS Field Entry Guide is not followed.** Many fields can be misleading and filling them out without reference will likely result in issues – you need the context from the Field Entry Guide to enter the fields correctly. For example:
 - *Integrated SUD and MH Treatment, Substance Use History, and Dx 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.’
 - *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’, ‘SED’
 - If *MI/SED Designation* field = ‘Not Evaluated’ then *Detailed SMI/SED Status* field CANNOT = ‘SMI’, ‘SED’, or ‘Neither SMI or SED’
 - *Minimum Wage for a child < 16 MUST = ‘Individual is Not Working.* (‘Total Income is based on household income, but the *Minimum Wage* field pertains to the client.)

For Additional Assistance

Contact ISBA@ceicmh.org