MAPP Health Home Tracking in AWARDS

AWARDS INSTRUCTION SHEET

In April 2016, New York State began to allow Health Home Care Management Agencies (CMAs) to upload the following files to MAPP:

- Billing Support File – Identifies billable services that CMAs provide.
- Tracking File Segment Record – Tracks movement of individuals through various statuses in their care coordination program (outreach, engagement, and hiatus).

In addition, MAPP can be used to export rosters of individuals who need care coordination outreach.

To help CMAs move toward single-system data entry, AWARDS features import capability designed specifically for importing incoming MAPP referrals. CMAs may also enter billing support data and tracking file segments directly into AWARDS, and then extract flat data files that can be uploaded to the Health Home or MAPP.

REQUIRED PERMISSIONS AND CONFIGURATION

MAPP imports and data tracking require chart access permission for those programs whose clients you will be working with, as well as data entry/access permissions to use functionality in the Services and Profile modules. For details on the individual permissions needed for each of these AWARDS components and their features please refer to AWARDS Online Help.

In addition to having the permissions necessary to access relevant functionality, your Foothold Senior Project Manager or Implementation Consultant must also have set up your AWARDS database to use the MAPP-related forms, reports, and features detailed throughout this document. If you do not see the various tools referenced here, please reach out to your Foothold Senior Project Manager or Implementation Consultant.

ABOUT THIS DOCUMENT

The document is intended to guide you through the process of working with MAPP-related data in AWARDS.

When working with this document, please keep in mind that the existing model in AWARDS is built to New York State's data specifications. If your Health Home allows CMAs to upload data directly to the MAPP, or if your Health Home does not allow CMAs to upload directly but accepts the NYS data specifications, your agency can use these instructions and the related AWARDS features in their current state; however, some Health Homes require additions or modifications to the State's specifications. In such cases, please contact your Foothold Senior Project Manager or Implementation Consultant to discuss how we can modify the model to meet your Health Home's needs.

Specific topics covered are:

IMPORTING MAPP REFERRALS INTO AWARDS

To import MAPP referrals into AWARDS, complete the following steps:

1. Contact your Foothold Senior Project Manager or Implementation Consultant to receive the **MAPP Roster Import Template**.

2. Paste data into the template from MAPP's export file. When doing so, keep in mind the following regarding the columns in the import template:

    - **A through T** – Comprise the standard roster demographics import. Detailed information can be found in the Client Roster table on the Preparing an Import File page in Online Help.

    - **U and V** – Are for uploading to the AWARDS Program Status feature and are not required. If they are left blank, AWARDS will auto-populate the client record with a program status of "Outreach" and a status start date that matches the roster import date.

    - **W through AE** – Enable you to upload entitlements such as Medicaid and other insurance information and income sources.

    - **AF and AG** – Refer to the creation date and time that will be placed on the form to which the import data is saved in AWARDS. We recommend that these values reflect the date and time of the import.

    - **AH through AO** – Should be populated with data from the referral file you downloaded from MAPP.

3. Use the **Client Roster ImportTool** to upload the data to AWARDS. Detailed instructions on this process can be found on the Validating and Importing Data page in Online Help.

4. When the import is complete, the MAPP referral data will be accessible from the **HH Roster Import Data** form in the AWARDS **Services** module.

The process of importing MAPP referrals into AWARDS is now complete.

CREATING THE BILLING SUPPORT UPLOAD FILE

Each month your staff will complete billing support data entry for every client. The HML questionnaire for this purpose is embedded within a Billing Support Data form in AWARDS. Once staff has completed that form for all clients, the Billing Support Upload File can be generated from within AWARDS as well. Both of these processes are described in the pages that follow:

ENTERING BILLING SUPPORT DATA

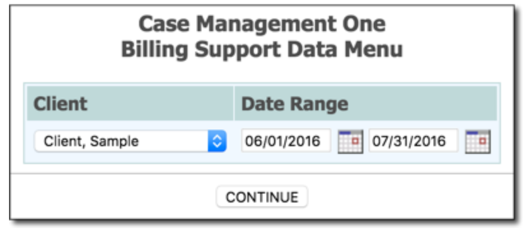
To access and complete the Billing Support Data form for each client, complete the following steps in AWARDS:

1. From the *AWARDS Home* screen, click **Charts** from the left-hand menu, and then click **Services**. The *Client Services Menu* page is displayed.

2. Click the **Program** drop-down arrow and select the program associated with the client for whom the form is to be completed.

3. Click the **Database** drop-down arrow and select "Data Entry."

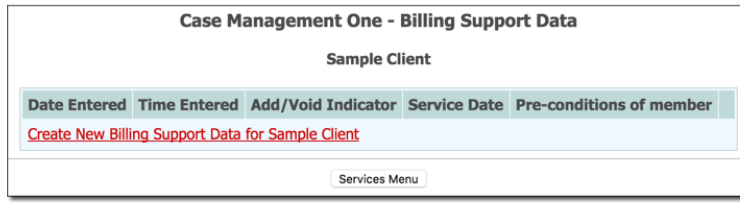
4. Click **Billing Support Data**. The *Billing Support Data Menu* page is displayed.



5. Click the **Client** drop-down arrow and select the client for whom the form is to be completed.

   *The **Date Range** on this page can be left at its default values; it is only relevant if you are updating an existing form, in which case the form's completion date must fall within this range.*

6. Click **CONTINUE**. The *Billing Support Data* form index is displayed, listing any previously completed forms for this client that were completed within the date range on the previous page.



7. Click **Create New Billing Support Data**. The *Billing Support Data* form is displayed in read-only mode. When viewing this page, keep in mind that:

   - If the form has been completed for the selected client previously, the form's fields/options will be pre-populated with the data from the last completed version.

   - The bottom of the page is comprised of read-only Diagnoses and Hospitalization History dynamic sections for your reference while completing the form.

8. To add to or change the form's data, click **Update Billing Support Data Section**. The form is displayed in data entry mode.

9. Fill out the form as completely as possible. When doing so, keep in mind that answering "Yes" to the question **Should HML be required for this client?** conditionally requires you to complete the HML questions that follow.

10. Click **SAVE**. The form data is saved and re-displayed in read-only mode.

The process of completing a client's Billing Support Data form is now complete. Repeat the above steps as needed until the form has been completed for all clients.

GENERATING THE BILLING SUPPORT UPLOAD FILE

To generate the Billing Support Data upload file, complete the following steps in AWARDS:

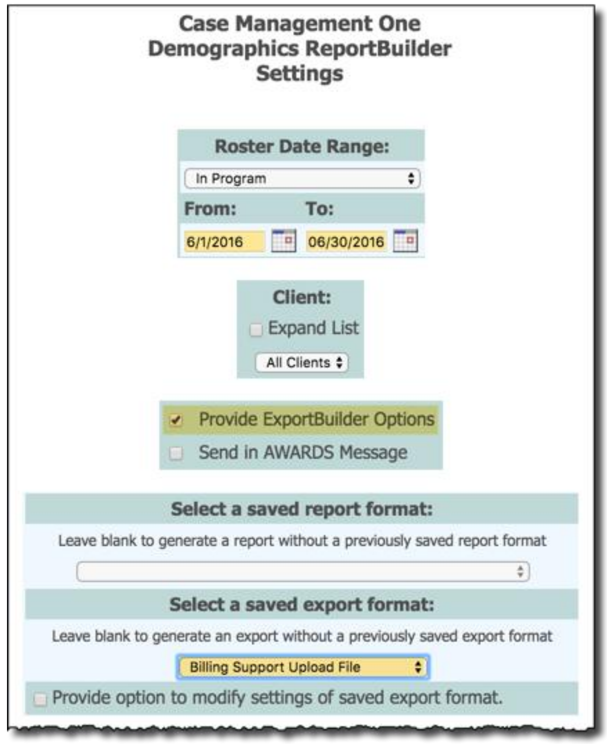
1. From the *AWARDS Home* screen, click **Census** from the left-hand menu, and then click **Profile**. The *Client / Program Profile* menu page is displayed.

2. Click the **Program** drop-down arrow and select the program for which the upload file is to be generated.

3. Click the **Database** drop-down arrow and select "Reports."

4. Click **ReportBuilders**. The ReportBuilder selection page is displayed.

5. Click **Demographics ReportBuilder**. The *Demographics ReportBuilder Settings* page is displayed.



6. On this page, adjust the following settings (shown at right):

   - **Roster Date Range** – Adjust the **From** and **To** dates to include clients who were in the program for the month the data file is being generated for. Use mm/dd/yyyy format or select dates with the date picker icons.

   - **Provide ExportBuilder Options** – Click this check box.

   - **Select a saved export format** – Click this drop-down arrow and select "Billing Support Upload File."

7. Click **CONTINUE**. The file data is displayed on the *Demographics ExportBuilder* page.

8. Click **Download XLS File** to download and save the file your agency can submit to the Health Home or MAPP.

   When reviewing the export data in AWARDS and/or the Excel file version of the data, keep in mind the following:

   - *Responses entered in the Billing Support Data form are mapped on the upload file to match MAPP data specifications.*

   - *The **Diagnosis Code** column exists as a placeholder; it does not pull any data from AWARDS. This data is not required by MAPP; however, you can manually populate this column in the XLS file in Excel.*

   - *By default, **CMA Direct Biller Indicator** auto-populates as "No" for all clients. If this configuration is incorrect for your agency, please contact your Foothold Implementation Consultant or Senior Project Manager.*

   - *When the data is exported to Excel, Excel will delete all leading zeroes from all date fields. To correct this, create a custom cell format of **MM/DD/YYYY** in Excel and use it to format all of the date columns this way.*

The process of generating the billing support upload file is now complete.

CREATING THE TRACKING FILE SEGMENT (TFS) RECORD

Periodically – normally either weekly or daily, depending on your Health Home's requirements – your agency will submit the Tracking File Segment (TFS) record. In order to use the standard TFS, your agency must be using the Program Status feature in AWARDS to track clients' movement through various statuses. Both of these processes are described in the pages that follow:

IMPORTANT! *If your agency is not currently using the Program Status feature, please contact your Foothold Implementation Consultant or Senior Project Manager.*

ENTERING TRACKING FILE SEGMENTS

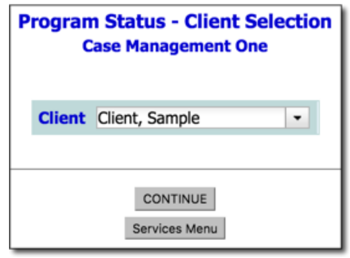
Each client will begin with the Program Status data that was uploaded using the ImportTool (as described on page **2**). Care coordinators can create new tracking file segments and also modify the pre-existing Outreach record by completing the following steps:

1. From the *AWARDS Home* screen, click **Charts** from the left-hand menu, and then click **Services.**

2. Click the **Program** drop-down arrow and select the program associated with the client for whom tracking file segments are being entered.

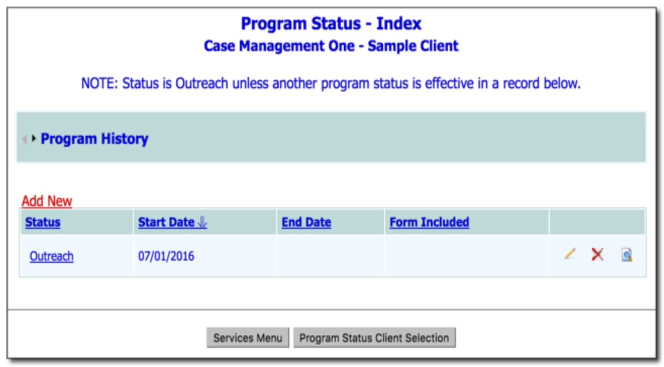
3. Click the **Database** drop-down arrow and select "Data Entry."

4. Click **Program Status**. The *Program Status – Client Selection* page is displayed.



5. Click the **Client** drop-down arrow and select the client for whom tracking file segments are being entered.

6. Click **CONTINUE**. The *Program Status – Index* page is displayed.



7. Complete one or more of the following data entry tasks as needed:

   - **To modify the pre-existing Outreach record –** Click **Outreach**. The record is opened in data entry mode. Click the **Include Form** drop-down arrow and select "Tracking File Segment Record Data." Complete the relevant fields/options, and then click **CONTINUE**.

     *Leave **End Date** blank until the individual's status changes. At that point, access this Outreach record again and update it to include the status end date.*

   - **To add a new status record –** Click **Add New**. A blank record is opened. Select the appropriate **Status** and enter the corresponding **Start Date**. Next, click the **Include Form** drop-down arrow and select "Tracking File Segment Record Data." The page is then updated to reflect that form's fields/options pre-populated with data from the latest previously completed status record. Make any modifications as necessary, and then click **CONTINUE**.

   The udpated form index is displayed.

The process of entering tracking file segments for this client is now complete. Repeat the above steps as needed until this data entry has been completed for all clients.

GENERATING THE TRACKING FILE SEGMENT RECORD

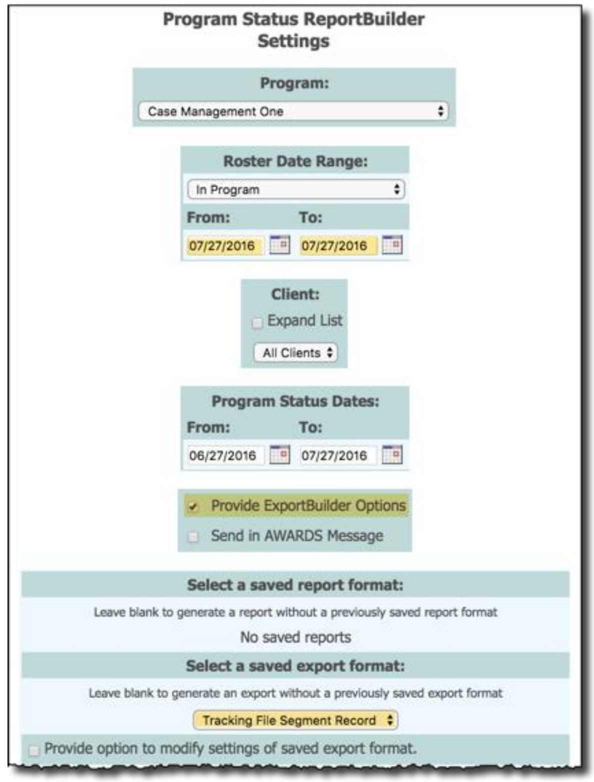
To generate the Tracking File Segment record, complete the following steps:

1. From the *AWARDS Home* screen, click **Charts** from the left-hand menu, and then click **Services.**

2. Click the **Program** drop-down arrow and select the program for which the record is to be generated.

3. Click the **Database** drop-down arrow and select "Reports."

4. Click **Program Status**. The *Program Status ReportBuilder Settings* page is displayed.



5. On this page, adjust the following settings (shown at right):

   - **Roster Date Range** – Adjust the **From** and **To** dates to include clients who were in the program for the period the record is being generated for (a single day or week). Use mm/dd/yyyy format or select dates with the date picker icons.

   - **Provide ExportBuilder Options** – Click this check box.

   - **Select a saved export format** – Click this drop-down arrow and select "Tracking File Segment Record."

6. Click **CONTINUE**. The record data is displayed on the *Program Status ExportBuilder* page.

7. Click **Download XLS File** to download and save the file your agency can submit to the Health Home or MAPP.

   When reviewing the export data in AWARDS and/or the Excel file version of the data, keep in mind the following:

   - *Responses entered in Program Status records are mapped on the Tracking File Segment record to match MAPP data specifications.*

   - ***Begin** and **End Dates** map to the first of the month per MAPP specifications, regardless of the actual status begin and end dates. For example, if a Program Status record reflects that a client was engaged on 07/07/2016, the Begin Date on the Tracking File Segment record will instead be 07/01/2016.*

   - *The **HH** and **CMA MMIS ID** fields must be customized for your agency if they haven't been already. Please send these numbers to your Foothold Implementation Consultant or Senior Project Manager for assistance.*

   - ***Direct Billing Indicator** defaults to "No" for all clients. Please contact your Foothold Implementation Consultant or Senior Project Manager if this not the case for your agency.*

   - ***TBD 1** and **2** columns are included per the MAPP data specifications. They are placeholders and do not contain any data.*

   - *When the data is exported to Excel, Excel will delete all leading zeroes from all date fields. To correct this, create a custom cell format of **MM/DD/YYYY** in Excel and use it to format all of the date columns this way.*

The process of generating the Tracking File Segment Record is now complete.