



9/13/2023

# OBHIS User Manual

OBHIS Basics

OBHIS Administrative Staff  
OHIO MHAS; QPR

## OBHIS User Manual

### **The basis and business case for OBHIS .....02**

- Important Links
- What is OBHIS and what is reported
- Who reports into OBHIS?
- Which clients are reported?
- How are data reported?

### **Creating an OH|ID account .....03**

### **Signing up for OhioMHAS iPortal and finding the OBHIS application .....05**

- Why do I need to sign up for the OhioMHAS group?
- How do I sign up for OhioMHAS group access?

### **One-time registration for OBHIS .....13**

- What do I need to have on hand to be ready to register for the OBHIS application?

### **Provider Administrator role and responsibilities .....14**

- Who is the Provider Administrator?
- What is the Provider Setup?
- How does the Provider Administrator add staff from their organization's OBHIS network?

### **Accessing OBHIS application – dashboard navigation .....18**

- What to expect when logging onto OBHIS

### **Creating a client record.....20**

- How to create a client record
- Create Client Screen
- Client Business Rules

### **Searching for a Client.....26**

- Searching for a Client
- Selecting Client Records

Selecting Client Records

**Admission, Transfer, Annual Update, and Discharge .....28**

Admission Record / Business Rules

Transfer Record / Business Rules

Annual Update / Business Rules

Discharge / Business Rules

## The Basics and Business Case for OBHIS:

### Important OBHIS links:

Link to OH|ID registration: <https://ohid.ohio.gov/wps/portal/gov/ohid/login>

OBHIS website: <https://mha.ohio.gov/home>

iPortal login page: <https://apps.mha.ohio.gov/iPortal/User/LoginTiles>

OBHIS Administrators email: [OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov)

### What is OBHIS and What is Reported?

- It is a web-based reporting application that collects Treatment Episode Information. This information was originally known as Treatment Episode Data Set (TEDS). This information collected in OBHIS includes SAMHSA's National Outcome Measures (NOMS). MH-TEDS information is required for SAMHSA's Substance Abuse and Prevention Treatment (SAPT) and the Mental Health Block Grant (MHBG) which currently provide roughly \$86,000,000 for Ohioans. NOMS collects employment status, educational status, living arrangement, criminal justice involvement, and social connectedness information. The collection of this information helps compare Ohio to other states to increase effectiveness of behavioral health (BH) programs throughout the state.
- OBHIS collects information on both substance use disorder (SUD) clients and mental health (MH) clients.
- A treatment episode for an SUD client includes 'Admission,' 'Transfer' (transfer level of care), and 'Discharge' information.
- A treatment episode for a MH client includes 'Admission,' 'Annual Update,' and 'Discharge' information.
- Other biopsychosocial information that is collected includes: smoking status, military status, referral source, pregnancy status, primary source of income, diagnoses, special populations, and disposition at discharge.

### Who reports into OBHIS?

- Any provider certified or licensed by OhioMHAS to provide behavioral health services are required under [ORC 5119.61](#) and [OAC 5122-28-04](#) to report information in OBHIS.

### Which clients are reported?

- Any client admitted to treatment for a MH and/or SUD diagnosis, whose services are paid for in whole or in part with public dollars (these include Medicaid, ADAMHS Boards, and OhioMHAS). This does not include Medicare unless the individual is covered in part by one of the other entities listed.

- Example A: If the agency has clients who pay cash for services or who use private insurance, they should not be included.
- Example B: If the agency has clients who are covered by private insurance AND Medicaid as a secondary insurance, then they should be included in the reporting.
- Example C: Inpatient and outpatient clients
- Example D: Dual diagnosis clients – manual entry of these clients has been streamlined within the OBHIS application
- Example E: Correctional clients if paid by the ADAMHS Board, but NOT if paid by DRC
- Example F: Crisis clients as ‘assessment only’ – these records are automatically discharged after entering their admission.

### How are data reported?

- OBHIS users can enter records into the application in two (2) ways:
  - **Manually enter each client** through an online data entry template that walks you through the process
    - Providers with annual caseloads of 500 or less typically choose this option.
    - Either staff can enter each of their own clients or a dedicated staff can enter each of the clients. There are forms available that clinicians can complete and give to that staff for data entry. These forms are online, but currently there is no way to upload those into the system – they would need to be entered manually.
    - NOTE: Clients can also be entered individually into an excel template and submitted through the batch upload feature if easier for the agency.
  - **Semi-automatically through a batch upload feature**
    - Providers with annual caseloads of 500 or more should consider this option (although agencies with a smaller number of clients can still use this, especially the excel file template).
    - Data extracted from the agency’s information system or EHR/EMR is formatted into a flat file and uploaded
    - Providers will need to work with IT staff or EHR/EMR vendor to implement batch reporting when pulling from another system.
- Reporting records in OBHIS requires planning:
  - Identify organizational staff to act as the OBHIS ‘provider administrator.’ This person authorizes other staff access to the OBHIS system, completes ‘provider setup’ in the system, and runs and uses reports to troubleshoot and maintain the data. (Refer to the Provider Administrator section)

- Any staff using the OBHIS application must first create an OH|ID account and then request OBHIS access. (Refer to the Registration and Dashboard section)
- Decide how organization will manage data flow: manually or batch. If batching from an existing EHR, please contact your IT vendor to assist in setting up the data you will use for the batch. This takes some time, so start early and let the OBHIS staff connect them with the test site to work out the bugs prior to submitting actual data into the system.

**Contact OBHIS administrators with any issues or frustrations you encounter:**  
[OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov).

### Creating an OH|ID account:

- To create an OHID account, you must first go to the OH|ID portal and click on 'Create OH|ID Account': <https://ohid.ohio.gov/wps/portal/gov/ohid/>

- Next, enter the information requested in each box. The navigation bar on the left side will help you know what else to do – the application will move you through this automatically.
- **Type your email address** in both boxes. Then click on 'send PIN' and it will send a PIN number to your email address. The PIN number is good for only 15 minutes.

**OH|ID**

Create OH|ID Account

**1** Email Verification

2 Personal Info

3 Pick a Username

4 Create Password

5 Account Recovery

6 Terms & Conditions

## Email Verification

With one OH|ID account, you can sign in to multiple State of Ohio agency systems more securely.

You need an active email address to create an OH|ID account. Need to create one? Companies such as [Google](#), [Microsoft](#), [AOL](#), and [Yahoo](#) offer free email accounts.

We need to verify the email address you want to use for your OH|ID account. A one-time PIN will be emailed to the email address you provide below.

Email Address

Confirm Email Address

Cancel

**Keeping Your Information Safe**

OH|ID respects your privacy. All the data we collect is to give you a better and more secure service. OH|ID does not lease, sell, or release your information to private companies, contractors, or vendors for any purpose.

- Enter the PIN number from your email. Then click on 'verify' and hit 'next'
- You cannot go back to previous pages unless you 'cancel' everything – then you will have to enter the whole system again.

**OH|ID**

Create OH|ID Account

**1** Email Verification

2 Personal Info

3 Pick a Username

4 Create Password

5 Account Recovery

6 Terms & Conditions

## Email Verification

An email with a one-time PIN was sent to begersper@gmail.com.

Enter PIN

Verify

**Having Trouble?**

- Search your junk mail and spam folder for an email from: [DONOTREPLY-EnterpriseIdentity@ohio.gov](mailto:DONOTREPLY-EnterpriseIdentity@ohio.gov).
- Wait 10 minutes and refresh your email inbox.

**Still Having Trouble?**

Your email provider is likely marking this email as spam, which is blocking or delaying it.

- Add [DONOTREPLY-EnterpriseIdentity@ohio.gov](mailto:DONOTREPLY-EnterpriseIdentity@ohio.gov) to your contacts.
- Ask your IT administrator to add this email to the safe-sender list.

[Send me a new PIN](#)

Cancel

- You will enter your first and last name and date of birth. You do NOT have to enter the last 4 digits of your SSN – this field is optional. Then click on 'Next'

The screenshot shows the 'Personal Info' step of the OH|ID account creation process. On the left, a vertical sidebar lists the steps: 1. Email Verification (checked), 2. Personal Info (highlighted with a blue circle), 3. Pick a Username, 4. Create Password, 5. Account Recovery, and 6. Terms & Conditions. The main content area is titled 'Personal Info' and contains four input fields: 'Legal First Name', 'Legal Last Name', 'Date of Birth' (with a placeholder 'mm/dd/yyyy'), and 'Last 4 digits of SSN (optional)'. The 'Legal First Name' and 'Legal Last Name' fields are highlighted with a green border. The 'Date of Birth' field is also highlighted with a green border. The 'Last 4 digits of SSN (optional)' field is highlighted with a red border. Below the input fields, there is a note: 'Be sure to use your real date of birth, you may need it for account recovery later.' At the bottom of the form, there are 'Cancel' and 'Next' buttons. The 'Next' button is highlighted with a green border.

- You will then pick a **'Username'** – this is NOT a password. It is the username. Then click **'Next.'**

The screenshot shows the 'Pick a Username' step of the OH|ID account creation process. On the left, the sidebar lists the steps: 1. Email Verification (checked), 2. Personal Info (checked), 3. Pick a Username (highlighted with a blue circle), 4. Create Password, 5. Account Recovery, and 6. Terms & Conditions. The main content area is titled 'Pick a Username' and features a section for 'Username Requirements' with the following bullet points: 'Must be between 6-64 characters', 'Cannot start or end in a special character', 'Cannot contain only numbers', and 'Only . \_ - or @ No other special characters'. Below the requirements is a single 'Username' input field, which is highlighted with a green border. At the bottom of the form, there are 'Cancel' and 'Next' buttons. The 'Next' button is highlighted with a green border.

- You will then create a **'password'** that you will enter two (2) times. Then click **'Next.'**

## Create Password

**Password Requirements**

- Must have at least 8 and no more than 30 characters in length
- Must contain 1 character from each of the following categories:
  - Upper case letters (A-Z)
  - Lower case letter (a-z)
  - Numbers (0-9)
  - Special characters (!\$#,%@~^-^&\*\_-+=><(){}[]%";:~\/?')
- Cannot include your first name, last name, username, or OH|ID
  - Example: If your name or username is John Smith, your password cannot contain "John" or "Smith"

Password       Confirm Password

- Terms and Conditions page pops up and you may read that and check the box next to 'I Agree.'
- Confirm you are not a robot by answering the question and then click 'Verify.'
- Then click on 'Create Account.'

**Create OH|ID Account**

- Email Verification
- Personal Info
- Pick a Username
- Create Password
- Account Recovery
- 6 Terms & Conditions**

### Terms & Conditions

In order to proceed with this request, you must agree to the following terms and conditions.

By clicking "I Agree" and creating an OH|ID Citizen, Business, or Workforce profile you consent to use electronic signatures with the State of Ohio and receive communications in electronic form.

If you use this site, you are responsible for maintaining the confidentiality of your OH|ID account(s) and password(s) and for restricting access to your computer, and you agree to accept responsibility for all activities that occur under your OH|ID account(s) or password(s). The Ohio Department of Administrative Services reserves the right, in the event of a violation of law or State of Ohio policy, or as a result of any suspicious activity occurring on your OH|ID account, to refuse service, terminate accounts, remove or edit content on Ohio.ohio.gov, or cancel transactions related to your OH|ID account.

Children under the age of 13 are not eligible to use services that require the submission of personal information and should not submit any personal information to us. This includes submitting personal information to the website as part of a user profile or profile personalization. If you are a child under the age of 13, you can use these services only if used together with your parents or guardians. Ask permission from your parents or guardians if you are under the age of 13.

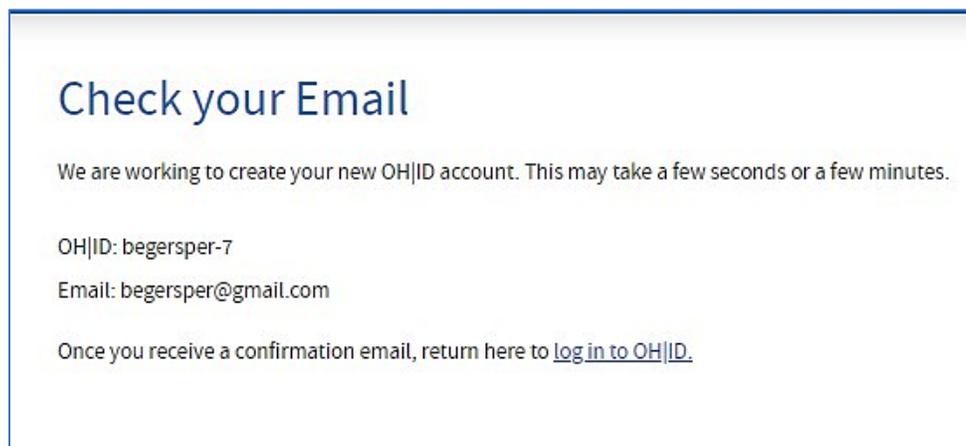
I Agree

---

**Confirm you are not a robot**

What is the 2nd digit in 217903?

- A 'Check your Email' box will pop up. Once you have received a confirmation that your account has been created, you may click on the 'log in to OH|ID' link.



**Congratulations!** You have set up an OH|ID account and may **sign up for access to the OhioMHAS group.**

Contact OBHIS administrators with any issues or frustrations you encounter:  
[OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov).

### **Signing up for access to the OhioMHAS group and finding the OBHIS application:**

#### **Why do I need to sign up for the OhioMHAS group?**

- You sign up for this group, so that you can get to the OBHIS application to begin entering your data. This step is straightforward and easily accessed.

#### **How do I sign up for OhioMHAS group access?**

- Once you have created the OH|ID account, you will go back and log into it through the link or here:  
<https://apps.mha.ohio.gov/iPortal/User/LoginTiles?ReturnUrl=%2FiPortal%2F>
- You will choose to **click on the correct card** (State Workforce Login if you are a State Employee; Ohio Citizens Login if you are NOT a State Employee)

OHIO MENTAL HEALTH & SUBSTANCE ABUSE SERVICES  
**Ohio MHAS**  
Promoting wellness and recovery

Please choose one of the login options below

**State Workforce Login**  
Use this option if you are a state employee or contractor  
**myOhio**  
Workforce Id  
For State Employees with OAKS Id  
Request Help

**Ohio Citizens Login**  
This option is for everyone who is NOT a state employee or contractor  
**OH|ID**  
Citizen Id  
For Providers & Business Users with OHID  
Read the How-To Guide Request Help

Do you still need to get an OH|ID account? Click here to register, or click here to read step-by-step instructions

If you have any questions related to this application, please contact our Help Desk in the Office of Information Services

tion and related supporting environment is for official OhioMHAS and State of Ohio purposes only. Illegal or unauthorized attempts to access the system and information may lead to criminal penalties and civil liability. Access and use of the system is subject to the terms and conditions of the OhioMHAS User Agreement and the OhioMHAS Privacy Policy. Consent to monitoring and/or logging of activity, which may be used for administrative purposes, criminal prosecution, or civil liability. Reference DAS ITP-B.10 : OhioMHAS AI-60 Security Notification.

- Next, enter your **login information**: your email and password OR your username and password (whichever it takes). Then click on **'Log In.'**

**OH|ID**  
Ohio's Digital Identity. One State. One Account.  
Register once, use across many State of Ohio websites

Create Account

**Log In**

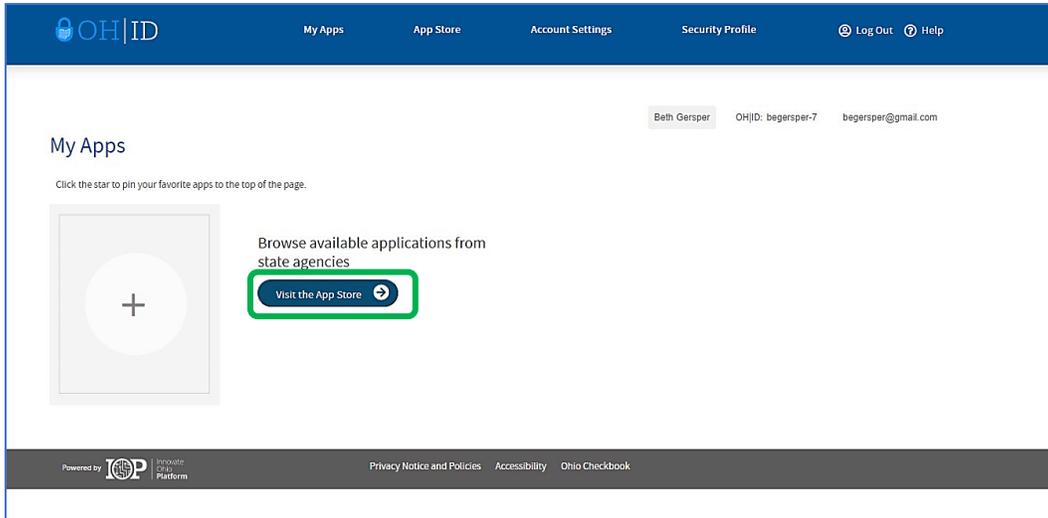
OH|ID

Password

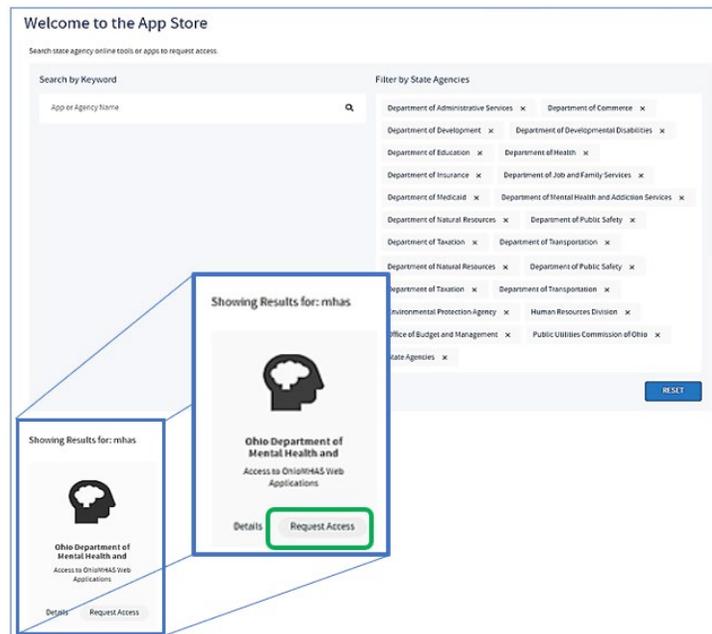
Log in

Forgot OH|ID? | Forgot password? | Get login help

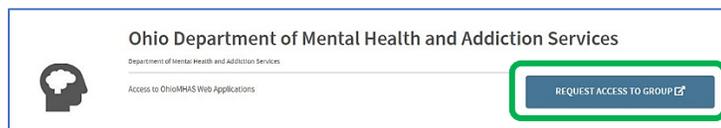
- Logging in with your OH|ID account information will take you to your Apps page. If you have already logged into OHID previously, any app you are linked to will be there. If not, the page will look like the one below. Click on **‘Visit the App Store.’**



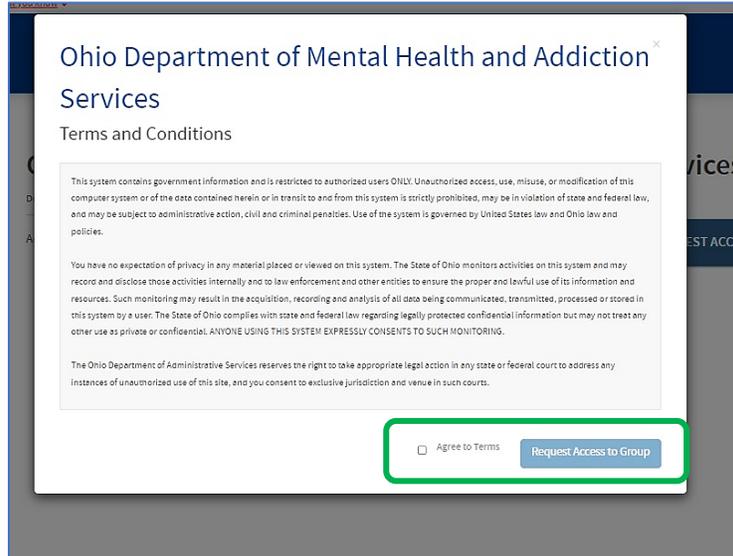
- You will be looking for the OBHIS App in OhioMHAS applications, so you will **search with ‘MHAS’** and get to this screen where you will scroll to the bottom of the page and see the OhioMHAS group card. Click on this card or the **‘Request Access’** button.



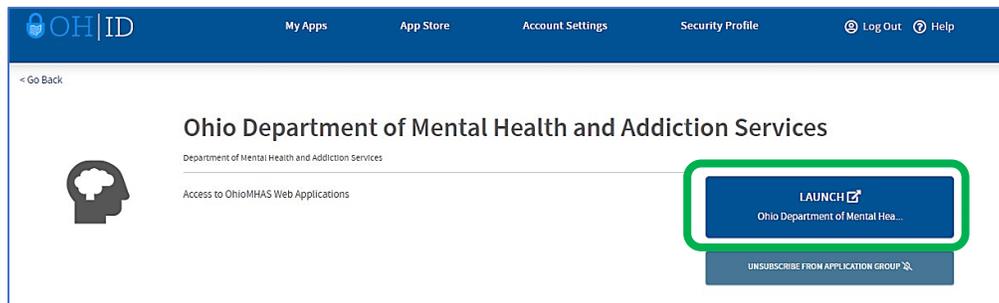
- If you end up on a page that looks like this, click on **‘Request Access to Group.’**



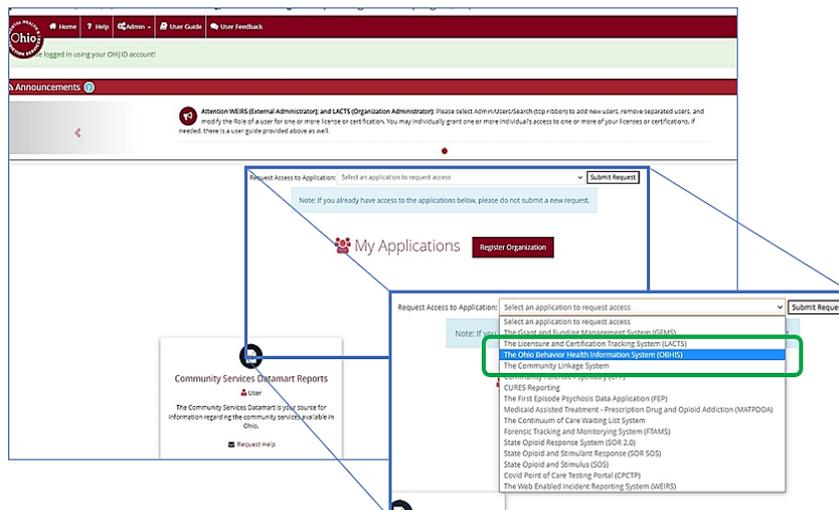
- A page with OhioMHAS Terms and Conditions will appear and you will need to **check the box** next to **'Agree to Terms.'** Then click the **'Request Access to Group'** button.



- Once you have access, you will have to **'Launch'** the OhioMHAS section by clicking on **'Launch.'**



- Once you gain access to the OhioMHAS group, you can **look up the OBHIS application** by using the dropdown request section on your dashboard. (the banner at the top is OhioMHAS red – signaling you are on the correct page).



## One-Time user registration for OBHIS: (once you're registered, you don't have to do this again)

### What do I need to have on hand to be ready to register for the OBHIS application?

- EIN or FTID number for your agency (if you do not know this number, the CEO or other Executive Leadership will be able to provide it to you; IF your agency only wants to use one EIN or FTID number for OBHIS for several locations, the addresses should match).
- The headquarter address and/or your agency's location (Your agency needs to figure out if you will use one address for several service provider locations or separate locations)

**Ohio** | Department of Mental Health and  
Addiction Services

### ONE-TIME USER REGISTRATION FOR OBHIS

#### Organization Lookup

Please enter your Employer Identification Number (EIN), also known as the Federal Tax Identification Number (FTID), and click on 'Search' to confirm that your organization is registered with OhioMHAS.  
If you don't know your EIN/FTID, this can be obtained from your organization's OBHIS Provider Administrator.

EIN / FTID: \*

*\*NOTE: if you do not find your agency in this list, please contact the Help desk for assistance.*

- Then you **follow the prompts** for the other windows to complete your request for OBHIS access.
- If you are the first in your agency to do this, your request for access will come to the OhioMHAS OBHIS administrators, who will grant you access as the 'Provider Administrator.' If you are NOT the first in your agency to do this, your request will be sent to your agency's Provider Administrator and they will be able to grant you access as another 'Provider Administrator,' an 'OBHIS User,' OR a 'Third Party User.' (Please see the section on OBHIS Roles to understand the different access and responsibilities for each)

Contact OBHIS administrators with any issues or frustrations you encounter:

[OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov).

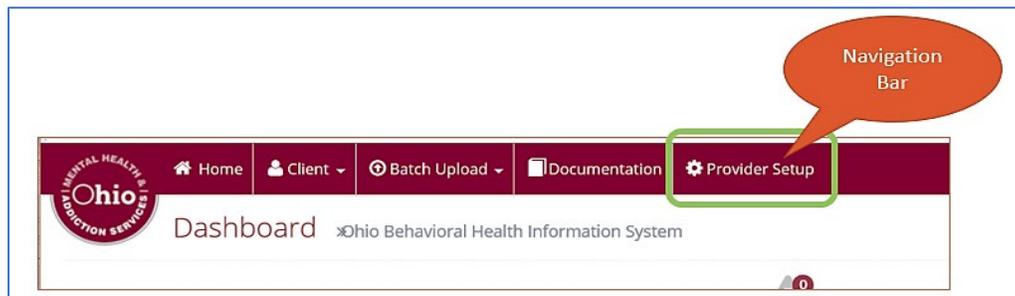
## Provider Administrator Role and Responsibilities:

### Who is the Provider Administrator?

- Every agency and ADAMHS Board must assign a Provider Administrator to maintain the OBHIS application for the agency/Board. There must be at least one Provider Administrator, but there may be more than one if the agency/Board prefers.
- Provider administrators are responsible for the following:
  - Completing the Provider Setup section in the application
  - Authorizing and maintaining staff access to the system (adding staff when they are hired and removing staff when they leave the agency/Board)
  - Assisting with initial questions when staff create an account and use it for the first time
  - Reporting to OhioMHAS if a Provider Administrator leaves the agency/Board

### What is the Provider Setup?

- The initial Provider Administrator should complete the Provider Setup which is found on the navigation bar within the OBHIS application



- Clicking on this tab will bring up a screen to assign connection(s) with ADAMHS Board(s). NOTE: if the agency is Medicaid ONLY clients, leave this section alone and maintain the OhioMHAS connection only (it is on there by default).
- The example below shows one agency as a Medicaid-Only Provider and a second agency as connecting to an ADAMHS Board. Only the Boards selected on this page will be able to see the agency's data.
- It is important to set up this connection with Boards as they make plans for state and federal resources in the community for behavioral health prevention, treatment, and recovery. The information they receive provides them with data to use for requesting more funding or targeted resources for the area.

Is this Agency a Medicaid-Only Provider? \*  Yes  No

Paying Entity / Board \*

Ohio Department of Mental Health and Addiction Services

Example: Medicaid ONLY Provider

Is this Agency a Medicaid-Only Provider? \*  Yes  No

Paying Entity / Board \*

Ohio Department of Mental Health and Addiction Services, ASHLAND COUNTY ADAMHS BOARD

Example: One Board associated with the provider

- An agency can choose more than one ADAMHS Board. Here is an example of what that would look like.

South Community Inc.  
3095 Kettering Blvd.

Is this Agency a Medicaid-Only Provider? \*  Yes  No

Paying Entity / Board \*

5 selected

- Ohio Department of Mental Health and Addiction Services
- ALLEN AUGLAIZE HARDIN ADAMHS BOARD
- ASHLAND COUNTY ADAMHS BOARD
- ASHTABULA COUNTY ADAMHS BOARD
- ATHENS-HOCKING-VINTON ADAMHS BOARD
- BELMONT-HARRISON-MONROE ADAMHS BOARD
- BROWN COUNTY ADAMHS BOARD
- BUTLER COUNTY ADAMHS BOARD
- CLARK GREENE MADISON ADAMHS BOARD
- CLERMONT COUNTY ADAMHS BOARD
- COLUMBIANA COUNTY ADAMHS BOARD
- CUYAHOGA COUNTY ADAMHS BOARD
- DEFIANCE (FOUR COUNTY) ADAMHS BOARD
- DELAWARE-MORROW ADAMHS BOARD
- ERIE-OTTAWA ADAMHS BOARD
- FAIRFIELD COUNTY ADAMHS BOARD
- FRANKLIN COUNTY ADAMHS BOARD
- GALLIA-JACKSON-MEIGS ADAMHS BOARD
- GEauga COUNTY ADAMHS BOARD
- HAMILTON COUNTY ADAMHS BOARD
- HANCOCK COUNTY ADAMHS BOARD
- HURON ADAMHS BOARD
- JEFFERSON COUNTY ADAMHS BOARD
- LAKE COUNTY ADAMHS BOARD
- LICKING KNOX COUNTIES ADAMHS BOARD
- LOGAN/CHAMPAIGN ADAMHS BOARD

Is this Agency a Medicaid-Only Provider? \*  Yes  No

Paying Entity / Board \*

5 selected

**NOTE: Don't forget to SAVE your changes to complete the setup...**

## How does the Provider Administrator add staff from their organization’s OBHIS network?

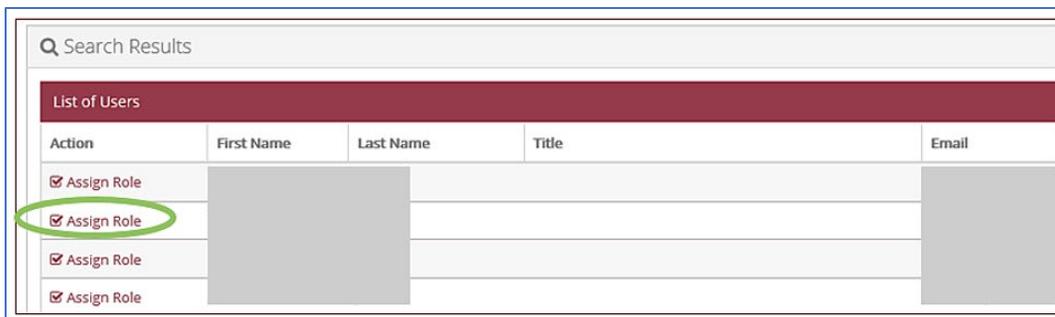
- After one Provider Administrator is added to the OBHIS application by OhioMHAS OBHIS staff, that Provider Administrator will receive all further requests for access from additional staff at their agency/Board. They will receive an email that will provide user information and links to assign roles. The email looks like this:



- Once you sign into the application, **DO NOT go to the OBHIS tile** – INSTEAD, you will click on the ‘admin’ tab.



- Using the information on the email, enter at least one search criteria (name, email, organization name, etc.) to find the individual who requested access. The name will come up on a ‘List of Users.’ Then click on ‘Assign Role.’



- Choose ‘OBHIS’ for the Application. Choose the organization. Choose the role to assign – the only roles you can assign will be available for selection.
  - Board User: this is for ADAMH Boards – this is NOT the Board’s Provider Administrator. This user will have access to the application to enter clients and

access to reports but will NOT be able to grant access to the application on behalf of the Board.

- OhioMHAS Business Administrator: this will not be an option for agencies or Boards. This role is only for OhioMHAS administrators.
- Provider Administrator: this is the Provider Administrator role for the agency or Board. This role will be able to grant access to the application on behalf of the agency or Board; will be able to enter client data; and will have access to all reports. There may be more than one Provider Administrator. **It is imperative that you let OhioMHAS OBHIS administrators know when a Provider Administrator leaves the agency or Board, so they can be removed from accessing the system and client-level data.**
- Provider User: this is for agency users. This is NOT the Provider Administrator. This user will have access to the application to enter clients and access reports but will NOT be able to grant access to the application on behalf of the agency.
- System Administrator: this will not be an option for agencies or Boards. This role is for OhioMHAS system administrators only.
- Third Party: this role is only for third parties of agencies who have hired someone to assist in entering data. This role has access only to enter client data, but not to reports and cannot grant access on behalf of the agency or Board.

Assign Role » Mental Health and Addiction Services iPortal

Application: \*  
OBHIS

Organization: \*  
Ohio Department of Mental Health and Addiction Services

Roles:

- Board User
- OhioMHAS Business Administrator
- Provider Administrator
- Provider User
- System Administrator
- Third Party

Cancel Submit

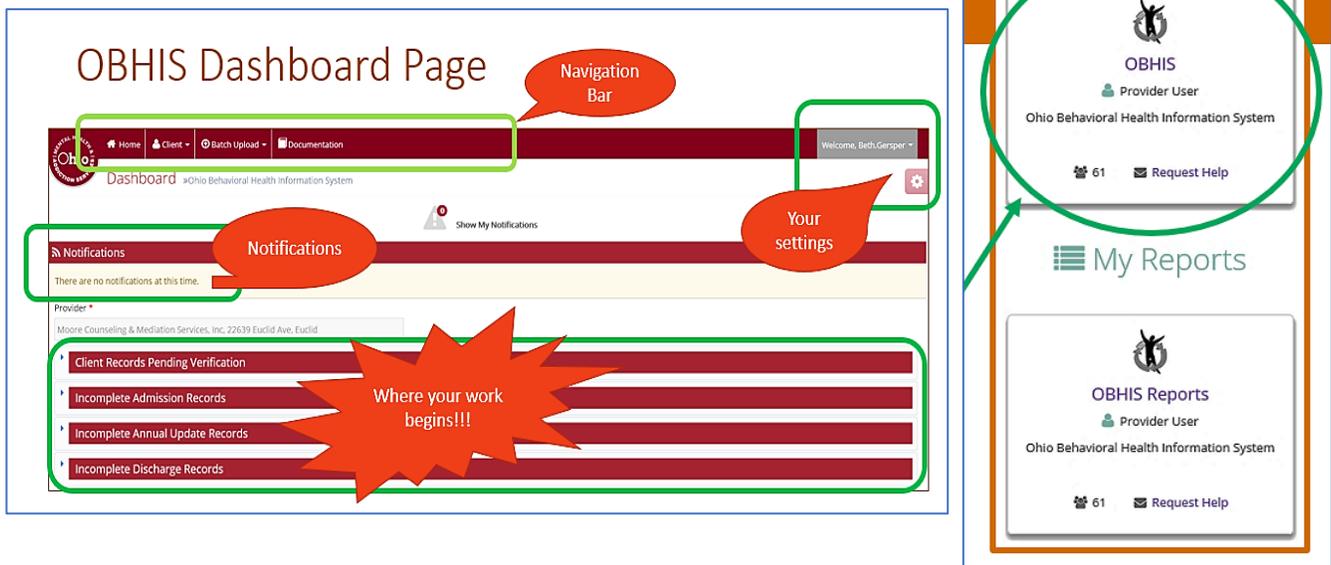
Don't forget to click on 'submit' when you've finished

Contact OBHIS administrators with any issues or frustrations you encounter:  
[OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov).

## Accessing OBHIS application – dashboard navigation

### What to expect when logging onto OBHIS:

- After requesting access to OBHIS, you will receive granting access. You will see the OBHIS application tile under 'My Applications.' Boards will not see this tile unless they are providers.
- You will see the OBHIS reporting tile under 'My Reports.' 3<sup>rd</sup> party users will NOT see this tile.
- Click on the OBHIS application card (pictured right)
- This will take you to the 'OBHIS Dashboard Page' (pictured below)

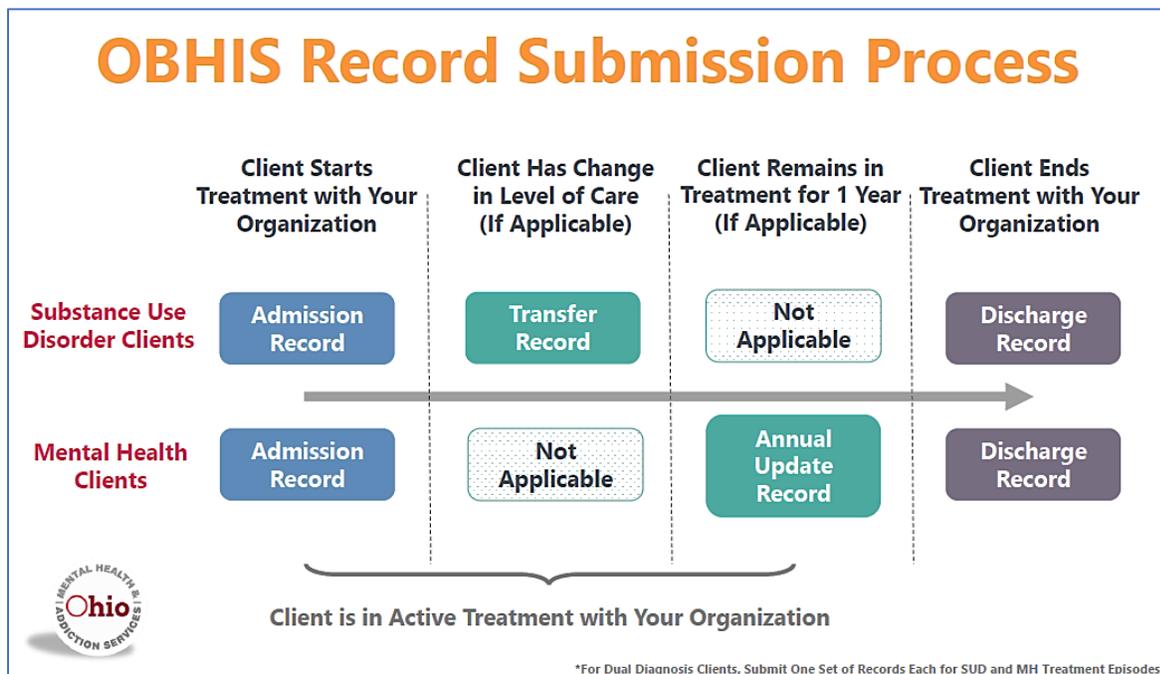


Here is where your work begins. You have a navigation bar at the top of the dashboard page – this will help you move around from the home screen (pictured) to client entry pages, to batch upload pages, Provider set up page (only there if you are a 'provider administrator'), and a documents page (which includes resources for you to use – field definitions, etc.). To the right you have your login and settings. Use these to personalize your OBHIS applications.

Notifications section will be used to show you any news or updates that we have for you. We also send those out through email. If you are not on the email list, please send an email to [OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov) requesting access to these shows/tours.

Finally, you will see quick navigation for 'client records pending verification,' 'incomplete admission records,' 'incomplete annual update records,' and 'incomplete discharge' records. Client records pending verification are all the records that have not been verified with a corresponding invoice to Medicaid, the Boards, or OhioMHAS. Incomplete admission records are records that you entered manually that have not been completed for some reason or another. They will remain on the list until they are verified. Only clients that are in pending

verification (where the client admission record has not been matched to a claim) for more than 365 days. Please review this list often as it has proven to be an issue. Contact the OBHIS staff or our IT department with any questions or concerns ([OBHISAdmin@mha.ohio.gov](mailto:OBHISAdmin@mha.ohio.gov) OR 614-466-1483). Incomplete admission records will be deleted after 14 days. Please check this list frequently to update records according to the requirements. Incomplete annual update records are client records that have been verified, but do not currently have a completed annual update. These are for Mental Health clients ONLY (see visual below). Incomplete discharge records list includes discharges for people who have not been seen for services in the past several months. Please check this frequently to update records according to the requirements. Incomplete annual update records will be discharged after 14 days. They need to be discharged. These are for SUD clients ONLY (see visual below). Incomplete entries will be deleted after 14 days. Please check this frequently to update records according to the requirements.



Contact OBHIS administrators with any issues or frustrations you encounter:  
[OBHISAdmin@mha.ohio.gov](mailto:OBHISAdmin@mha.ohio.gov).

## Creating a client record:

### How to create a client record

- On the navigation bar, click on client. This will show you a drop-down box with options to 'create client' OR 'search client.' In this part of the guide, we will show you how to create a client.
- Only Provider administrators, provider users, and/or third-party users may create an admission record. OhioMHAS OBHIS administrators can view the clients to assist with technical assistance (TA), but they cannot create them for you.)
- Click on 'create client'

Home Client Batch Upload Documentation

Create Client »Ohio Behavioral Health Information System

the following information

Navigate to the Provider Setup screen or contact Provider Administrator to associate the Provider with Boards

Provider: \*

Moore Counseling & Mediation Services, Inc, 22639 Euclid Ave, Euclid

Identifier Type \* Identifier Number \*

Select... Enter Identifier

First Name \* Last Name \*

Enter First Name Enter Last name

Date of Birth \* Gender \*

Enter Date of Birth (MM/DD/YYYY) Select...

Race \* Ethnicity \*

Select... Select...

A signed release for this information has been obtained \*

Note: You must obtain a signed release for this information to be able to create an admission record.

Cancel Next

- This will take you to the first page which consists of demographic information:
  - Provider/agency name should be filled out unless you have access to several, in which case you will have to choose the correct provider location
  - Identifier Type (GOSH, Medicaid, SHARES, SSN, MACSIS, Heartland, and Unknown)
  - Identifier number (MUST match the Identifier Type – this will be used to match with claims data to verify the client)
  - First name, Last name
  - Date of birth
  - Gender (Female, Male, Unknown – this field is sometimes used to help verify a client or trouble shoot. Please use whatever matches the records for claims data)
  - Race (6 specific races, plus “other,” “two or more,” and “unknown”)
  - Ethnicity (4 specific ethnicities, plus “other,” “not of Hispanic origin,” and “unknown”)

- At the bottom of this page before you can go on, there is a box to check verifying that a release for information has been obtained. Please work with your agency as to what this means to your clients. Often, providers will have admission paperwork that clients sign that include a release of information to OhioMHAS because of licensure and certification requirements. Once you check this box, you may go to the next page.

### Create Client Screen

- The top will be auto filled with demographic information and the name of the client
- Choose type of admission (AOD, MH, or both)

- Choosing a type of admission brings up specific pages to complete in the client record. They are listed below. Additionally, if the client is female, there will be information on pregnancy and childbirth.

Type of admission	Client Information	Children in Household	Special Populations	AOD Information	MH Information
AOD	X	X	X	X	
MH	X	X	X		X
Dual (AOD and MH)	X	X	X	X	X

- The application will walk you through the pages with the help of a 'navigation wizard' in the middle of the page that lets you know where you are in the process. Again, the information at the top of the page is automatically filled with the client's name and some demographic information.

- The first page of the client information screen includes:
  - Date of first contact and date of admission
  - Education information
  - Marital status
  - Referral information
  - Employment
  - Tobacco use
  - Military status
  - Expected reimbursement method
  - County of residence
  - Paying board (this connects the client to the ADAMH Board)
  - Assessment and referral only (choose 'YES' if the client will NOT be continuing in services with your agency, like crisis clients who are not admitted for services, just for assessment and referral and then taken someplace else for services; these clients' information is recorded, but the client is automatically discharged so that the provider does not have to immediately create a discharge record)
  - Provider client number (the number given by the agency to the client – not the identifier number on the client demographic page that is connected to their claims data)
  - Number of arrests

- Children in household screen. This screen looks different for males and females.

The top screenshot shows the 'Children in Household' screen for female clients. It includes a progress bar at the top with five sections: Client Information, Children in Household, Special Populations, AOD Information section, and MH Information section. The 'Children in Household' section is active. Questions include: 'Childbirth Within the Last 5 Years?' (Yes), 'Is Client Currently Pregnant?' (Yes), and 'Number of Children in Household under 18' (2). A callout box states: 'For Female Clients, there are questions about pregnancy...'. Other fields include 'Lifetime Total Number of Births? (live and still)' (3) and 'Current Stage of Pregnancy' (2nd Trimester).

The bottom screenshot shows the same screen for male clients. The 'Children in Household' section is active, with a question: 'Number of Children in Household under 18'. A callout box states: 'For Male Clients there is only a question of number of children in household...'. At the bottom, there are four buttons: 'Cancel', 'Previous', 'Save and Finish Later', and 'Next'. A callout box points to these buttons, stating: 'Cancel, Previous, Save and Finish Later, and Next options'.

- Special populations screen – you may choose as many as you like unless the ‘NO SPECIAL POPULATION’ box is checked. If that box is checked it will gray out the other options.

## Special Populations Screen:

• You can choose more than one  
 • If you choose No Special Population, then the rest of the choices are unavailable.

The screenshot shows the 'Special Populations' screen. At the top, there is a progress bar with 'Client Information' selected. Below the progress bar, the text 'Select all that apply\*' is followed by a list of checkboxes:

- SMD/SED
- Early Childhood Risk for SED
- Forensic/Legal Status
- Sexual Offender
- Suicidal
- Military Family Dependent
- In Custody of Children's Services
- Alcohol/Other Drug Use
- Language Barriers/English as a Second Language
- Deaf or Hearing Impaired
- Developmental Disability
- Physically Disabled
- Blind or Visually Impaired
- Speech Impaired
- HIV/AIDS
- Hepatitis C
- Traumatic Brain Injury
- Physical Abuse Victim
- Sexual Abuse Victim
- Domestic Violence Victim/Witness
- Child of Alcohol or Drug User
- Non-Conforming Gender Identity
- Gay/Lesbian/Bisexual
- Multiple Service System Involvement
- NO SPECIAL POPULATION

- If the client is an AOD client or dual client, you will see an AOD information screen. The information gathered here is specific for AOD clients and includes:
  - Diagnosis codes (up to 3 – primary diagnosis code has to be an AOD code for this screen)
  - Level of care
  - MH history
  - Prior AOD episodes
  - Medication assisted therapy
  - Attendance of self-help programs
  - Primary, secondary, tertiary drugs of choice; frequency of use; route of administration; age of first us

**AOD Information Screen:**

- Diagnosis codes – up to 3
- Level of Care
- MH history
- Prior AOD episodes
- Medication Assisted Therapy
- Attendance of self-help programs
- Primary, secondary, tertiary drugs of choice; frequency of use; route of administration; age of first use

Primary Dx for AOD client must be an AOD code

Arrow navigation for Dx codes

Drug of choice, frequency of use, route of administration, age of first use – for up to 3 drugs of choice

- If the client is a mental health client or dual client, you will see the MH information screen:
  - Diagnosis code(s) – either ICD 10 OR DSM 5 codes – you cannot mix and match; up to 3 codes. The primary dx code on this page must be an MH code.
  - Care setting: community, jail/prison, type 1 bed: residential, unknown

Primary Dx for MH client must be an MH code

- Diagnosis code(s) – You must choose either ICD 10 codes OR DSM 5 codes – you cannot mix and match these.
- Care Setting: Community, Jail/Prison, Type 1 Bed: Residential, unknown

**NOTE: once all information is entered, please remember to click on "SUBMIT" to complete the admission record**

## Business Rules: Client Information

Business Rule Attribute	Definition	Additional Notes
Identifier Type * <b>GOSH</b> * <b>SHARES</b> * <b>Heartland</b> * <b>MACSIS</b> * <b>SSN</b> * <b>Private Pay</b>  * <b>Unknown</b> * <b>Medicaid</b>	* <b>GOSH, SHARES</b> and <b>Heartland</b> identifier number allow to enter up to 15 characters (special characters not part of it) * <b>MACSIS</b> identifier number allows up to 7 alphanumeric characters (special characters not part of it) * <b>SSN</b> field format should be NNN-NN-NNNN (where N is a number) * <b>Private Pay</b> Identifier Number should be Private Pay and disabled. Admissions submitted for clients with an identifier type of 'Private Pay' will not go into a Pending Status but will instead enter the Client status of 'Private Pay' * <b>Unknown</b> : It should be Unknown, and Identifier Number disabled. * <b>Medicaid</b> Identifier Number field requires 12 alphanumeric characters (special characters not part of it)	Client State after Admission Submitted - 'Pending Verification'; Client record is verified based on a match of identifier type with record in OhioMHAS Data Warehouse
Identifier Number		Client record is verified based on a match of this number with a record in OhioMHAS Data Warehouse; if Identifier Type is Medicaid, Identifier Number must be 12 digits long
First Name	Max 125 characters	Client record is verified based on a match of the first four characters in the first name with a record in the OhioMHAS Data Warehouse
Last Name	Max 125 characters	Client record is verified based on a match of the first eight characters in the last name with a record in the OhioMHAS Data Warehouse
Date of Birth	Date Format {mm/dd/yyyy}. It cannot be a future date.	Client record is verified based on a match of DOB with a record in the OhioMHAS Data Warehouse.
Gender		Client record is verified based on a match of gender with a record in the OhioMHAS Data Warehouse
Race		
Ethnicity		
* If a client has an MH admission associated which has Annual Update or Discharge record, THEN the client cannot be deleted		
* If a client has an AOD admission associated which has Transfer or Discharge record, THEN the client cannot be deleted		
* Client cannot be deleted once client is verified		
* Client record that has been verified cannot be edited		

## Searching for a client:

- Provider Administrators, Provider Users, 3<sup>rd</sup> Party Users, and OhioMHAS OBHIS Administrators can search for clients.
- Enter at least ONE search criteria (Name, ID number, status, Provider name) and click on the 'search' button. To narrow the search results, enter more search criteria.
- "Search Results – List of Clients" table will be displayed (only 50 search results at a time)

Action	Last Name	First Name	Date of Birth	Identifier Number	Client Status	Last Modified
Select View						
Select View						
Select View						
Select View						
Select View						
Select View						
Select View						

• This is where you can choose an action:

- **Select, View, Edit, or Delete**

Action	Last Name
Select View	ADAMS
Select View	ADDAMS
Select View	ADKINS
Select View	ADKINS
Select View	ADKINS

Action	Last Name
Select Edit Delete	TEST

You will have alternative selections if the client is still 'Pending Verification'

- **Delete** – a user can only 'delete' a client's admission record from this screen IF the client has NOT yet been verified
- **Edit** – the user can edit certain fields, but NOT others:
  - User CAN edit:
    - Identifier type
    - Identifier number
    - First name
    - Last name
    - Race
    - Ethnicity
  - User CANNOT edit:
    - Date of birth
    - Gender
    - Provider
- **View** – if you select 'view' on a list of clients, user can view client demographic information, but CANNOT view client records (admissions, transfers, updates, or

discharges) because you are choosing to view the client information only. This viewing will only show you basic demographic data.

- **Select** – if you ‘select’ a client on the list, you are selecting to see a records list for a client. This means the next screen will be a list of the admissions, transfers, updates, and discharges for that client.

**Record Search Results** **“View” – only demographic information**

<p>Identifier Type MACSIS</p> <p>First Name HEATHER</p> <p>Date of Birth 2/3/1984</p> <p>Race White</p>	<p>Identifier Number 1540539</p> <p>Last Name ADAMS</p> <p>Gender Female</p> <p>Ethnicity Not of Hispanic Origin</p>
---	--

**“Select” – includes the list of records for that client**

List of Records					
Action	Admission Date	Admission Type	Provider Client ID Number	Number of Transfers	Number of Annual Updates
Admission View Transfer Create/View Discharge Create	7/14/2011	AOD	1		

Cancel 1 of 1 records

### Selecting Client Records:

- Once you ‘select’ a client, you will have certain actions available depending on the type and status of the record.
- For example: you cannot create a transfer, update, or discharge until the client’s admission is verified
  - This can pose a problem if the Provider delays submission of claims or if the claims take a while to process
  - Client records are verified every night at midnight

Create New Admission

List of Records

Action	Admission Date	Admission Type
Admission View Transfer Discharge View	8/12/2020	Dual-AOD
Admission View Annual Update Discharge View	8/12/2020	

List of Records

Action	Admission Date	Admission Type
Admission View Transfer Create/View Discharge Create	1/20/2017	AOD

**Admission, Transfer, Annual Update, and Discharge:**

- **Admission:** (AOD/SUD or MH) You can ‘view’ - this will allow you to look through the admission record.

Business Rules: Admission Record

Business Rule Attribute	Business Rule	Definition
<b>Client Information Screen</b>		
Date of First Contact	<ul style="list-style-type: none"> <li>* Date of First Contact cannot be after Admission Date</li> <li>* Date of First Contact cannot be prior to the Date of Birth</li> </ul>	The date the client first contacted the provider with a request for services
Date of Admission	<ul style="list-style-type: none"> <li>* Date of Admission cannot be a future date</li> <li>* Date of Admission cannot be prior to the Date of First Contact</li> </ul>	The day when the client receives his or her first direct treatment or recovery services
Marital Status	N/A	
Highest Education Level Completed	Highest Education level has to be lower level than Current Education Enrollment	
Current Education Enrollment	Current Education Enrollment has to be higher level than Current Education Enrollment	
Employment at Admission	N/A	
Primary Income Support	Primary Income Support cannot be NONE if Employment at Admission equal to Full Time OR Part Time.	
Does Client Use Tobacco Products?	N/A	
Living Arrangement at Admission	N/A	
Expected Reimbursement Method	N/A	
Referred By	N/A	
Assessment and Referral Only	<p>Rule 1:                      Assessment and Referral drop down value should match with Admission type                      If Admission type = AOD, Assessment and Referral = No (or) AOD                      If Admission type = MH, Assessment and Referral = No (or) MH                      If Admission type = AOD and MH, Assessment and Referral = No (or) AOD (or) MH (or)AOD and MH</p> <p>Rule 2:                      Administrative discharge will be created if AOD</p>	

	(or) MH (or) AOD and MH is selected for AdmissionType and LevelOfCare = Assessment Only.	
Military Status	The Military Status will default to "None" and Read Only if client is under 18 years old.	
County of Residence	* The Paying Entity/Board dropdown shall only display Paying Entities/Boards for which the client's provider is assigned (through the Provider setup screen) * IF a client's Provider is Medicaid-Only, THEN any admissions for that client shall default the Paying Entity dropdown to Ohio-MHAS on the Client Information screen (the field shall be disabled).	
Provider Client Number	N/A	
Paying Entity/Board at Admission	All associated providers will be displayed in the Paying Entity/Board at Admission drop down list	
Number of Arrests in the Past 30 Days	N/A	
<b>Children in Household</b>		
Childbirth Within the Last 5 Years?	Yes or No option	
Lifetime Total Number of Births? (live and still)	If Births greater than 0 or less than 99	
Is Client Currently Pregnant?	If client Currently Pregnant equal to YES, Current Stage of Pregnancy is required.	
Current Stage of Pregnancy	current state of pregnancy one of the drop - down values: - 1st Trimester - 2nd Trimester - 3rd Trimester - Unknown	
Number of Children in Household under 18	number must be greater than 0 less than 99	
<b>Special Populations</b>		
Special Population	If 'No Special Population' is selected, the user not able to select any other fields.	
<b>AOD Information Section</b>		
Primary Diagnostic Code (AOD only)	Should be AOD code only and can select only one code	
Secondary and Tertiary Diagnostic Code	Can be either AOD or MH code and can select up to two codes	

Level of Care	Level of Care will be "Assessment Only" if Referral and Assessment drop down value equal to one of the following values: AOD (or) MH (or) AOD and MH	
Prior AOD Episodes	N/A	
Level of Care Consistent with Assessment	If Level of Care is "No" Then Not Consistent with Assessment should have a value	
Not Consistent With Assessment Reason	If Not Consistent with Assessment value is 'OTHER,' then "Other Please Specify" should have value	
Mental Health History	N/A	
Medication Assisted Therapy	No other check boxes can be selected if NONE is selected	
Attendance of Self-Help Program (last 30 days)	N/A	
Primary Drug of Choice	If Primary Drug of Choice is Unknown, Primary Frequency of Use, Primary Route of Administration value must be Unknown and Age of First Use value must be '97'.	
Primary Frequency of Use		
Primary Route of Administration		
Age of First Use	The Age of First Use must not be greater than the client's age	
Secondary Drug of Choice	If Secondary Drug of Choice is Unknown, Primary Frequency of Use, Primary Route of Administration value must be Unknown and Age of First Use value must be '97'.	
Secondary Frequency of Use		
Secondary Route of Administration		
Age of First Use	The Age of First Use must not be greater than the client's age	
Tertiary Drug of Choice	If Tertiary Drug of Choice is Unknown, Primary Frequency of Use, Primary Route of Administration value must be Unknown and Age of First Use value must be '97'.	
Tertiary Frequency of Use		
Tertiary Route of Administration		
Age of First Use	The Age of First Use must not be greater than the client's age	
<b>MH Information Section</b>		
Primary Diagnostic Code (MH only)	Should be MH code only and can select only one code	
Secondary and Tertiary Diagnostic Code	Can be either MH or AOD code only and can select up to two codes	
Care Settings		

<b>Create Admission</b>		
* Matching clients can be created for different providers		
* Transfer cannot be created for Discharged Admission		
<b>EDIT Admission</b>		
* Cannot Edit an Admission Type once an admission is submitted		
* Cannot Edit an AOD/MH Admission If Admission Date is More than 6 months old		
* Cannot Edit an AOD/MH Admission If it is Discharged.		
* Cannot Edit an AOD/MH Admission If it has Transfers/Annual Update		
* All fields are editable except Admission Type, and Date of Admission once the admission record has been submitted		
<b>DELETE Admission</b>		
* Cannot Delete an AOD/MH Admission if it has a Transfer/Annual Update		
* Cannot Delete an AOD/MH Admission if it has a Discharge		
* Cannot Delete an AOD/MH Admission If it is More than 6 months old		

- **Transfer:** (AOD/SUD clients only) – you can ‘create/view’ – this will take you to a list of transfers for the client – you may add a transfer for Level of Care.

### Business Rules: AOD(SUD)-Transfer

Business Rule Attribute	Business Rule
<b>Add Client Transfer</b>	
Transfer Level of Care	Cannot create Transfer with Same Level of Care for Two consecutive records
Date of Transfer	Transfer date cannot be prior to admission date
<b>Create Transfer</b>	
* Cannot create Transfer if there is incomplete Transfer	
* Cannot create multiple transfers for <b>same</b> day, for <b>same</b> Level of Care and consecutive days for <b>same</b> Level of Care	
* Transfer cannot be created for Discharged Admission	
<b>DELETE Transfer</b>	
* Transfer record cannot be deleted if it is more than 6 months old	

- **Annual Update:** (MH clients only) – you can ‘create/view’ – this will take you to a list of Annual Updates for the client – you may create a new Annual Update.

## Business Rules: MH Annual Update

Business Rule Attribute	Definition: Business Rule
<b>Client Information Screen</b>	
Highest Education Level Completed	Highest Education level has to be lower level than Current Education Enrollment
Current Education Enrollment	Current Education Enrollment has to be higher level than Current Education Enrollment
Employment Status	
Living Arrangement	
Does Client Use Tobacco Products?	
Number of Arrests in the Past 30 Days	
<b>Special Population Screen</b>	
Special Population	If 'No Special Population' is selected, the user not able to select any other fields.
<b>MH Information Section</b>	
Primary Diagnostic Code (MH Only)	Should be MH code only and can add only one code
Secondary and Tertiary Diagnostic Code	Can add up to two codes; can be either MH or AOD codes.
Care Setting	
<b>Create Annual Update</b>	
* Annual Update Can create only one Annual Update per Calendar Day	
* Annual Update Cannot Create an Annual Update if there is incomplete Annual Update	
* Annual Update Can Create Annual Update only after Admission Date	
* Annual Update cannot be created for Admission with a Discharge	
<b>EDIT Annual Update</b>	
* Annual Update Can Create and Edit Annual Update after Admission Date	
* Annual Update Can Create/Edit Annual Update only if Admission is Open	
* Annual Update cannot edit if it is older than 6 months	
<b>DELETE Annual Update</b>	
* Annual Update cannot be deleted die Admission with a Discharge	

- **Discharge:** (AOD/SUD or MH) You can ‘create’ – this will walk you through screens to create a discharge.

## Business Rules: Discharge

Business Rule Attribute	Definition: Business Rule	Additional Notes
<b>Client Information</b>		
Current Education Enrollment	Rule 1: Current Education Enrollment must be higher level than Current Education Enrollment	
Highest Education Level Completed	Rule 1: Highest Education level must be lower level than Current Education Enrollment Rule 2: Highest Education Level should be greater than or equal Highest Education Level at Admission.	
Current Living Arrangement	N/A	
Number of Arrests in Past 30 Days	N/A	
Current Employment Status	N/A	
Does Client Use Tobacco Products?	N/A	
<b>Children in Household</b>		
Was Client Pregnant at Admission?	Current State of Pregnancy” at the admission cannot be an earlier stage of pregnancy on the “Status of Admission Pregnancy” at discharge	
Status of Admission Pregnancy	Status of Admission Pregnancy value cannot be an earlier stage of pregnancy at the admission time Current State of Pregnancy.	EX: At Admission: - Current State of Pregnancy is 3rd trimester At Discharge: - Status of Admission Pregnancy should not be 1st OR 2nd trimester
Is Client Currently Pregnant?	N/A	
<b>Special Population</b>		
Special Population	If 'No Special Population' is selected, the user not able to select any other fields.	
<b>AOD/MH Information Section</b>		

Primary Diagnostic Code (AOD Only)	Should be AOD code only and can select only one code	
Secondary and Tertiary Diagnostic Code	Should be AOD code only and can select up to two codes	
Primary Drug of Choice	If Primary Drug of Choice is Unknown, Primary Frequency of Use, and Primary Route of Administration value must be Unknown	
Primary Frequency of Use	Primary Frequency of Use should be unknown if Primary Drug of Choice is Unknown	
Primary Route of Administration	Primary Frequency of Use should be unknown if Primary Drug of Choice is Unknown	
Secondary Drug of Choice	If Secondary Drug of Choice is Unknown, Primary Frequency of Use, and Secondary Route of Administration value must be Unknown	
Secondary Frequency of Use	Secondary Frequency of Use should be unknown if Secondary Drug of Choice is Unknown	
Secondary Route of Administration	Secondary Frequency of Use should be unknown if Secondary Drug of Choice is Unknown	
Tertiary Drug of Choice	If Tertiary Drug of Choice is Unknown, Tertiary Frequency of Use, and Tertiary Route of Administration value must be Unknown	
Tertiary Frequency of Use	Tertiary Frequency of Use should be unknown if Tertiary Drug of Choice is Unknown	
Tertiary Route of Administration	Tertiary Frequency of Use should be unknown if Tertiary Drug of Choice is Unknown	
Attendance of Self-Help Programs (last 30 days)	N/A	
Did the Client Choose Another Provider Due to Religious Preference?	N/A	
Level of Care at Discharge		
Was Client Screened for Gambling		
<b>AOD/MH Information Section</b>		
Primary Diagnostic Code (MH Only)	Should be MH code only and can add only one code	
Secondary and Tertiary Diagnostic Code	Should be MH code only and can add up to two codes	
Care Setting at Discharge		

<b>DISCHARGE Information Section</b>		
Discharge Reason		
Discharge Date		
Date of Last Service	Date of Last Service date should not be later than Discharge Date	
<b>Create Discharge</b>		
* Cannot Create discharge if there is incomplete Discharge already exists		
* Can Create discharge if client has open Admission		
<b>EDIT Discharge</b>		
* A discharge record cannot be edited if it is older than 30 days		
<b>DELETE Discharge</b>		
* A discharge record cannot be deleted if it is older than 30 days from the Discharge creation date.		

Contact OBHIS administrators with any issues or frustrations you encounter:

[OBHISadmin@mha.ohio.gov](mailto:OBHISadmin@mha.ohio.gov).