



# COLORADO

## Behavioral Health Administration

## Central Registry User Guide

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# Central Registry Basics

## General Questions

<b>What is the Central Registry?</b>	An automated system to admit and discharge Opioid Treatment Program clients built within the CommCare system.
<b>Why does BHA have a Central Registry?</b>	It is federally-mandated that States must maintain an OTP central registry. This automated system reduces client wait times, provider administrative burden and improves system accuracy. People used to have to email the Colorado's SOTA (Ryan Muller) everytime they admitted someone new to an OTP!
<b>Who are users of the Central Registry?</b>	<ul style="list-style-type: none"><li>• Colorado OTP staff including admissions/intake, front desk, and data/technology teams to admit and discharge clients.</li><li>• BHA staff to monitor OTPs and resolve admissions conflicts.</li></ul>
<b>How can users get Central Registry tech support?</b>	<p>For Central Registry support, email <a href="mailto:cdhs_bha_provider_support@state.co.us">cdhs_bha_provider_support@state.co.us</a>, monitored 8am-5pm, Monday-Friday.</p> <p>Central Registry client admission, lock and edit requests are monitored from 8am-5pm, Monday-Friday by BHA's OTP program team.</p>
<b>How is this data used?</b>	<ul style="list-style-type: none"><li>• Data is used by BHA staff to validate that OTP clients are only enrolled at one OTP at a time to avoid duplicate dosing.</li><li>• OTP staff users of the Central Registry can view only the clients enrolled in their OTP and conflicting admissions.</li><li>• Data in aggregate (non PHI/PII level data) is sometimes used to do analysis on Colorado OTP usage for program improvement.</li></ul>
<b>How do people get access to the Central Registry?</b>	<ul style="list-style-type: none"><li>• For <i>new</i> OTP clinics or locations, please contact Ryan Muller, Colorado's State Opioid Treatment Authority (SOTA) at <a href="mailto:ryan.mueller@state.co.us">ryan.mueller@state.co.us</a> to get the onboarding process initiated.</li><li>• To add or remove users at <i>existing</i> OTP clinics and locations, please fill out the <a href="#">Central Registry Access Form</a>, or email <a href="mailto:cdhs_bha_provider_support@state.co.us">cdhs_bha_provider_support@state.co.us</a>.</li></ul>

## System Outage Policy

In place of Central Registry, please consult nearby OTPs as needed to ensure dual enrollment is not a concern prior to admitting new patients. Please keep record of admits and discharges to enter into Central Registry.

Complete a Central Registry admission when the system is active again and change the admission date to fit the original admission date by editing the client admission history after submitting the client. Please utilize your best clinical judgment in these situations as they will be on a case by case basis.

## Onboarding

### Logging In

Initially, you will receive an email invitation to the system. This email comes from [cdhs\\_bha\\_provider\\_support@state.co.us](mailto:cdhs_bha_provider_support@state.co.us). If you cannot find this email in your mail Inbox, please look in your spam folder. If it is not either in your Inbox or spam folder, please contact [cdhs\\_bha\\_provider\\_support@state.co.us](mailto:cdhs_bha_provider_support@state.co.us) for further assistance. We recommend that you bookmark the [login page](#) for easy access going forward.

If the invitation has expired (more than 30 days passed since the email was sent to you) please contact [cdhs\\_bha\\_provider\\_support@state.co.us](mailto:cdhs_bha_provider_support@state.co.us) for further assistance.

### User Maintenance

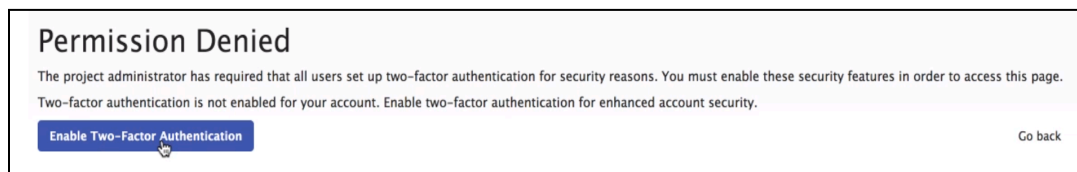
OTP's are responsible for removing access when employees leave or no longer need to access the Central Registry.

To add or remove users at existing OTP clinics and locations, please email [cdhs\\_bha\\_provider\\_support@state.co.us](mailto:cdhs_bha_provider_support@state.co.us).

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

### Two-Factor Authentication (2FA)

After you finish your initial login, you will see a window prompting you to setup two-factor authentication. 2FA is a measure that strengthens security by requiring two methods to verify your identity (i.e. login credentials and a secondary code). OTP users are required to set up 2FA to ensure the security of this system.



In this process, users can decide if they would like to receive authentication codes in the following ways:

1. Google Authenticator Mobile App (***strongly preferred***): Users can download and install the Google Authenticator app to generate tokens when logging into CommCareHQ.
2. A phone call: You can register your phone number and receive an automated call or text with a token for logging in.
3. Text Message: You can register your cell phone and receive an automated text with a token for logging in.

You can reset your current two-factor authentication under your account settings. To do this, please:

1. Go to the settings widget at the upper right hand corner, that looks like a gear icon
2. Select "My Account Settings"
3. Click on Two Factor Authentication
4. Select "Reset Two Factor Authentication." This will make you go through the process of updating your two-factor process. Before doing this, please make sure you have tokens available to confirm your original two-factor, as the system will make you go through the process again.

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

During two-factor authentication setup, each user will receive 10 backup tokens. These are one-time codes that allow you to login to your account if you lose access to your two-factor authentication. These backup tokens should be copied/printed and saved in a secure place. It's always good to keep these on hand for situations where you think you might not be able to access your normal 2FA method.

To generate backup tokens:

1. Go to the settings widget at the upper right hand corner, that looks like a gear icon
2. Select "My Account Settings"
3. Click on Two Factor Authentication
4. Click on "Show Codes" under the heading Backup Tokens

Backup tokens are an important safety net should your 2-factor authentication token ever stop working. Backup tokens can be regenerated at any time, not just when you first log in. Please navigate to the gear icon located in the upper right hand corner of your screen, select Account Settings -> Two-factor authentication -> Generate Backup Tokens. Record a few of these backup tokens for safe keeping.

## Admitting Clients

### Admitting New OTP Clients

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

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

If no results are returned, that means there are no active records in the system that match the information you entered. Then you can select Admit New Client and proceed with filling out and submitting that form. There may be matches to clients with inactive records. In this case, you will select all records and can proceed with the admission.

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

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

## Detailed Steps

*Scenario:* Admitting a client that is not currently admitted to the Central Registry and does not have an active lock status.

1. Select "Search and Admit Client" page.
2. In the Search and Admit Client page:
  - a. First, you must check the Central Registry, to see if your client is currently admitted at another location or has an active lock status. Enter as much information as you have about the client including First Name, Last Name, DOB, (optional) Medicaid ID, and (optional) Social Security Number. Use the following formats:
    - i. First Name: Use the whole name (not an abbreviated version)
    - ii. Last Name: Use the whole name (not an abbreviated version)
    - iii. DOB: YYYY-MM-DD / YY-MM-DD / MM-DD-YY / MM-DD-YYYY
    - iv. Medicaid ID: 1 letter followed by 6 numbers (eg., a123456)
    - v. Social Security Number: XXX-XX-XXXX (**must include dashes**).
    - vi. If you do not include a SSN, you will be prompted to provide a reason
  - b. Before performing the search, you must confirm that you have received consent: "Consent obtained by the provider for the purposes of searching the Central Registry to confirm admission" and select "YES"
  - c. Submit search by clicking Submit.

3. If no results are returned, that means there are no active records in the system that match the information you entered. Select the Admit New Client button.
  - a. If one or more client records are returned, you will be taken to the Request Admission Review form to proceed with the admission request (proceed to [Request an Admission](#) for further instruction).
4. Complete Admit Client form. Please note that users with the “Clinic” user permissions can only admit to one location. Users with the “Provider” permissions can admit to multiple locations.
  - a. You can access a receipt of admission by clicking on the client's name from the Search My Clients module and then clicking on the form labeled, “Admit/Discharge Summary.”
5. Newly admitted clients will appear in Search My Clients list with Currently Admitted status set to Yes. Note that the Currently Admitted column reflects the client’s status at the clinic where the user is provisioned

## Admitting Existing OTP Clients

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

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

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

You will be taken to the **Pending Admission Management** page where you can finalize the admission. **You must accept the admission in order for the admission to be recorded in Central Registry.**

### Detailed Steps

*Scenario:* When you attempt to admit a client that matches a record for a client currently admitted to the Central Registry or with an active lock status, you must request an admission from BHA.

1. In the Request Admission Review form, review the potential matches and complete the “(Required) Next Step” field and submit the form for BHA review by clicking Submit.
2. The client will now appear in the Pending Request case list with a status of “Pending.” Upon submission, the state user will receive an email notifying them that a request has been submitted for review.

3. Once the admission is approved or rejected, the clinic user will receive an email notification to alert them that a determination has been made. The admission will appear in the Pending Request list with a new status of “Approved” or “Denied” for 24 hours.
4. To finalize the admission, select the approved pending admission and you will be taken to the Pending Admission Management form
5. Complete the required questions in the Next Action.
  - a. If you select Yes to complete the admission, complete the admission questions
6. Submit the form to finalize your admission.

### Search Tips

- The column headings first name, last name, and DOB can be reordered alphabetically or numerically by clicking the column headings.
- The search bar above a list allows users to search for identifying terms to quickly isolate a client or clinic, or set of clients or clinics, matching specific criteria. The search bar does NOT return results for cases that are not already in the case list.
- At the bottom of Search My Clients, there is a button “Filter Search My Clients”. Users can select this to conduct a case search across the clients in their Search My Clients list.

## Discharging Clients

Let’s say you have a client who you are discharging from your OTP. First you will search for the client within the [Search My Clients](#) page.

Once you click on the client, you will be taken to a page where you can select [Discharge Client](#).

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

### Detailed Steps

*Scenario:* Discharging a client that is currently admitted to an OTP clinic within the Central Registry. Please note that Single Clinic Users can only discharge from one location. Multi Clinic Users can discharge from their multiple locations.

1. Navigate to the Search My Clients list
2. Navigate to the desired client record
3. Select Discharge Client from the Search My Clients menu.

4. Complete the required fields and submit the form by clicking Submit.
  - a. You can access a receipt of the discharge by clicking on the client's name from the Search My Clients module and then clicking on the form labeled, "Admit/Discharge Summary."
5. The client will appear in the Search My Clients list but the "Currently Admitted" status will be changed to "No".

## Other Features

### Locking Clients

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

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

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

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

### Detailed Steps

*Scenario:* Locking in or out a client at your OTP.

1. Navigate to Search My Clients list
2. Navigate to the desired client record.
3. From the Search My Client menu select Update Lock Status Request.
4. In the Update Lock Status Request form, select the type of lock you are requesting using the radio buttons next to "What status would you like to request for this client?"
5. Select "Yes" from "Are you sure you want to lock in / lock out the client at [clinic name]"
6. Submit the form by clicking Submit.
7. The pending lock status request will now appear in the Pending Request case lists, awaiting their approval or rejection.
8. Once the lock status is approved or denied, the user will receive another email notification to alert them that a determination has been made by the state.



## Editing Client Information

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

The update request will have to be reviewed by BHA, and you will receive an email when that review has been completed.

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

### Detailed Steps

*Scenario:* Updating personal information for a client at your OTP.

1. Navigate to Search My Clients list
2. Navigate to the desired client record
3. From the Search My Client menu select Update Client Information Request
4. Complete the Update Client Information Request form
5. Submit the form by clicking Submit.
6. The pending update client information request will now appear in both the "Clinic" and "State" users' Pending Request case lists, awaiting their approval or rejection. The "State" user will also receive an email notification notifying them that a pending request is awaiting review by a BHA team member.
7. Once the pending request is approved or denied, the "Clinic" user will receive another email notification to alert them that a determination has been made by the state.

### Detailed Steps

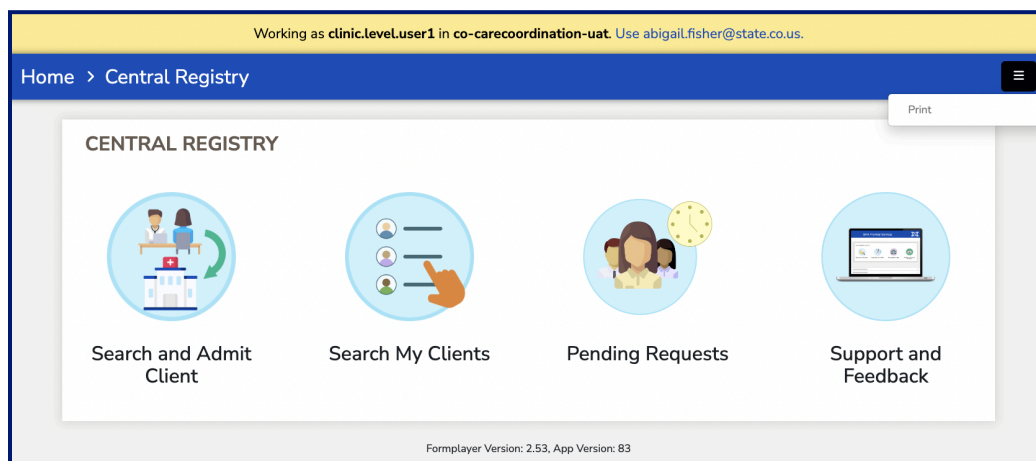
*Scenario:* Updating admit/discharge history for a client at your OTP.

1. Navigate to Search My Clients list
2. Navigate to the desired client record
3. From the Search My Client menu select Admit/Discharge History
4. In the Search Admission case list, select the desired admission
5. In the Admit/Discharge Summary Form, review the Demographic Information and Admission Summary

6. Select “Yes” for Request Edit
7. New questions will appear in the Request Edit section, select the desired fields to edit and input the updated information.
8. Submit the form by clicking Submit.
9. The pending update admission information request will now appear in the Pending Request case lists, awaiting approval or rejection.
10. Once the pending request is approved or denied, the user will receive another email notification to alert them that a determination has been made by the state.

## Printing

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



## Email Notifications

All users are notified via email from [commcarehq-noreply-production@dimagi.com](mailto:commcarehq-noreply-production@dimagi.com) when a change has been made in the app that requires their attention or for them to take an action. Email notifications will occur in the event of:

- **Client Admission:** Users will receive an email when an admission determination has been made for a pending request.
- **Lock Status:** Users will receive an email when a determination has been made for a pending lock in/out request.
- **Client Information Update Request:** Users will receive an email when a determination has been made for a pending client information update request.

- **Update Admission Information Request:** Users will receive an email when a determination has been made for a pending update admission information update request.

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

A admission request was submitted by Aurora Therapy Center LLC - 13th Ave on 9/5/2022, 2:34 PM. Please log-in to BHA Provider Services [https://www.google.com/url?q=https://www.commcarehq.org/a/co-carecoordination-dev/app/v1/541f3359a4c642cb9f74db9a692d872b/state\\_pending\\_requests/?case\\_id%3D4ddda8c5-b47c-4d30-903f-0142283b050b&source=gmail-imap&ust=1663007665000000&usq=AOvVaw0qEy3bJkYwKP-X6VyT3WFW](https://www.google.com/url?q=https://www.commcarehq.org/a/co-carecoordination-dev/app/v1/541f3359a4c642cb9f74db9a692d872b/state_pending_requests/?case_id%3D4ddda8c5-b47c-4d30-903f-0142283b050b&source=gmail-imap&ust=1663007665000000&usq=AOvVaw0qEy3bJkYwKP-X6VyT3WFW) to review the admission request.

—  
Thank you for using BHA Provider Services. If you have any questions, please email [CDHS\\_BHA\\_Provider\\_Support@state.co.us](mailto:CDHS_BHA_Provider_Support@state.co.us)

## Troubleshooting

If you are encountering an error message or seeing a discrepancy in the data and have already tried to resolve your issue by syncing the application, you can try clearing user data or breaking lock requests as a second line of troubleshooting. In the Web Apps home screen, select the Settings button.

Next, click “Break” to break pending request locks or “Clear” to clear user data. This ensures that your user is aligned with the current system and that any processes that were causing an issue are cleared.

**SETTINGS**

---

Break Pending Request Locks Break

---

Clear user data Clear

---

Done

Common Issues	Answers/Suggestions
Which browser should I use to access the system?	We recommend using Firefox or Google Chrome to use the application. Specifically, we have found that Internet Explorer does not show parts of the application, including the CommCare Help Menu. For System Administrators who require reporting capabilities, Google Chrome is the recommended browser. For ease of access, users should bookmark the application on their chosen web browser.
Is the CommCare website down?	You can see the status of CommCare’s website on this <a href="#">website</a> . If you do not see a status update and are unable to access the central registry you can submit a support ticket to <a href="mailto:BHA_Provider_Support@state.co.us">BHA_Provider_Support@state.co.us</a>
Can I use the system on my phone or tablet?	This is not recommended. The CommCare can be accessed through on Android phones and tablets using the CommCare mobile


	application however this application and its features have been designed to work on web applications, Dimagi recommends that you use the system on a desktop or laptop computer.
I am getting a cookie error when I log into the system.	If you are receiving a cookie error, please try <a href="#">clearing your browser's cache</a> or hitting "refresh." If this does not work, please try using a different browser.
I keep getting logged out of the system.	For security reasons, the system has an inactivity timeout in place. After 30 minutes of inactivity, your login session will time-out. Should this happen, you will be prompted to be logged back in through a new window.
I selected an answer for a question that I want to leave blank. Is there a way to "unselect" my answer?	If you selected a "multi-selection" option (square button), hold down on the button that you selected. This will un-select the option. If you have selected a "single-select" option (circular button), you can select the Clear button or select another option.
I'm getting the error message "There are errors in this form's answers. These must be corrected before the form can be submitted." What does this mean and what should I do?	Either you did not respond to a required question or one of your answers is not in the required format. Please scroll back up through the form and look for a small red check on the right hand side. When you find the problem, there will be red text describing what needs to be changed.

## Pulling Reports

There are several reports that users are able to pull from the Central Registry. These reports are made from Tableau dashboards within the CommCare platform. These reports contain tables and graphs that display data related to client admissions, client discharges, and average lengths of stay on a monthly and annual basis. Users can only pull data from the clinics they are assigned to.

Click on "Show Full Menu" from the home screen of the Web Application. This will reveal a top-level menu at the top of the page.

There are a number of filters you can use to sort the date. Users can also download the reports and underlying data that is visible to them. To download a report, graph, or dataset, navigate to the bottom right hand side of the screen and select the download icon. It's recommended that you download first and then print because printing directly from the application may result in an incomplete display.

 **Follow your clinic's guidelines and policies for handling sensitive health data when exporting reports to avoid exposing PHI/PII.**

Data is updated every hour at the top of the hour (i.e. data entered in the application at 11:15AM will be reflected in reports at 12:00PM).

## Census Reconciliation

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

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

### Detailed Steps

*Scenario:* Performing a census reconciliation report.

1. Compile your own electronic active OTP census (patient list), including the first and last name and date of birth for each active client.
2. Navigate to the Reports dashboard, and begin by selecting the "Census by Client" report.
3. After selecting the report, the filter of information will be to the right of the screen marked by the red arrows.
  - a. Client Central registry must be checked as "TRUE"
  - b. Service Status can be "All" or "Active"
  - c. Note - Census report defaults to 10 years. That can be adjusted up to 20 years if necessary.
4. Once that has been filtered, download the data into an MS Excel format or utilize CSV if you have a different program like Google Sheets to view data in a spreadsheet.
5. Compare the results from your clinic's active client list to the "Census by Client" report you downloaded. Please make any necessary corrections to names, birth dates, and social security numbers in the CommCare system.
6. Within the same "Census by Client" report in Commcare, review for clients requiring enrollment or discharge and also for patients requiring date adjustment to enrollment or discharge.