

1.0 Document Definitions

This section provides information about the EHR Behavioral Health (BH) document definitions and TIU business rules for these documents. The guidelines were designed to support the integration of behavioral health and primary care in the interest of improved health outcomes. Suggested business rules allow for limited accessibility of BH TIU notes on a need to know basis. Facilities may adopt different document definitions and business rules that meet their local needs. However, it is recommended that EHR Clinical Application Coordinators work closely with Behavioral Health providers and Health Information Management consultants to ensure that access to BH notes is limited in accordance with relevant federal regulations.

1.1 Note Titles

Below are the types of note titles for behavioral health and what type of user has access to them.

- Tier I BH All Providers
- Tier II BH Only BH Providers

1.2 General Business Rules

The MIS Chief has access to Tier I and Tier II notes, signed or unsigned.

Only the author (and MIS Chief) can view, edit, sign or print unsigned BH notes.

Use established EHR user classes for physicians, nurses and pharmacists.

Develop a new EHR “BH Provider Class” (see categories in Tier II).

1.3 User/Provider Class Definitions

This section provides information about the provider class definitions and what privileges each class has for BH notes.

1.3.1 Tier I - BH All Providers

The following providers can only view signed Tier I BH notes:

- Physicians
- Pharmacists
- Nurses

In addition to the above, providers included in the defined BH user class (see Tier II) can view and print signed Tier I notes. “All Providers” means physicians, pharmacists, nurses, and BH providers.

1.3.2 Tier II - BH Only BH Provider

These notes can be viewed, edited, signed, and printed only by the providers listed below (who are included in the EHR “BH Provider/User Class”):

- **MENTAL HEALTH PROVIDER:** includes all categories of psychiatrists, psychologists, marriage/family and professional counselors, independent clinical social workers, psychiatric nurse practitioners, mental health case managers, etc.
- **MEDICAL SOCIAL WORKER:** includes all categories of medical social workers, social work aides, social work case managers, etc.
- **ALCOHOL/SUBSTANCE ABUSE PROVIDER:** includes all categories of Alcohol/Substance Abuse (A/SA) counselors, A/SA case managers, etc.

1.4 TIU and Business Rules for Behavioral Health Notes

This section provides information for creating a new document class, a new user class, and business rules.

1.4.1 Document Class Creation

Two new TIU Document classes are created using the option DDM3 (Create Document Definitions). This option is found in RPMS by selecting EHR → TIU Configuration → TIU Medical Records → TIU Maintenance Menu.

The following shows the notes titles and what tier each belongs to:

BH ALL PROVIDERS	[Tier I]
BH ONLY BH PROVIDERS	[Tier II]

These display in RPMS as follows (see items 10 and 11):

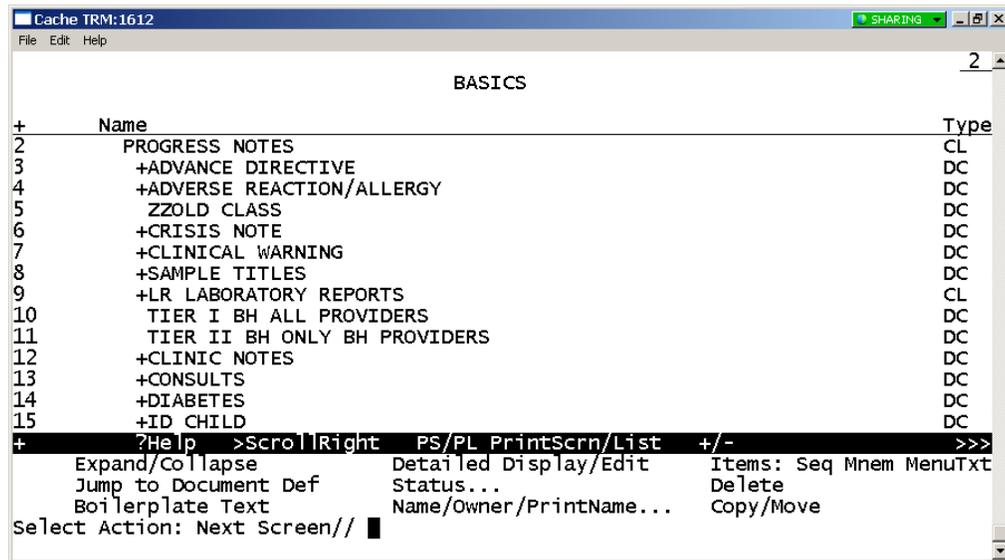


Figure 1-1: Sample List of Document Classes in RPMS

Titles can be created as needed in each of the two new Document Classes.

1.4.2 User Class Creation

You need to create new User Class BEHAVIORAL HEALTH.

Use the option UCM1 (User Class Definition). This option (UCM1) is found in RPMS by selecting EHR → TIU Configuration →TIU Medical Records →TIU Maintenance Menu.

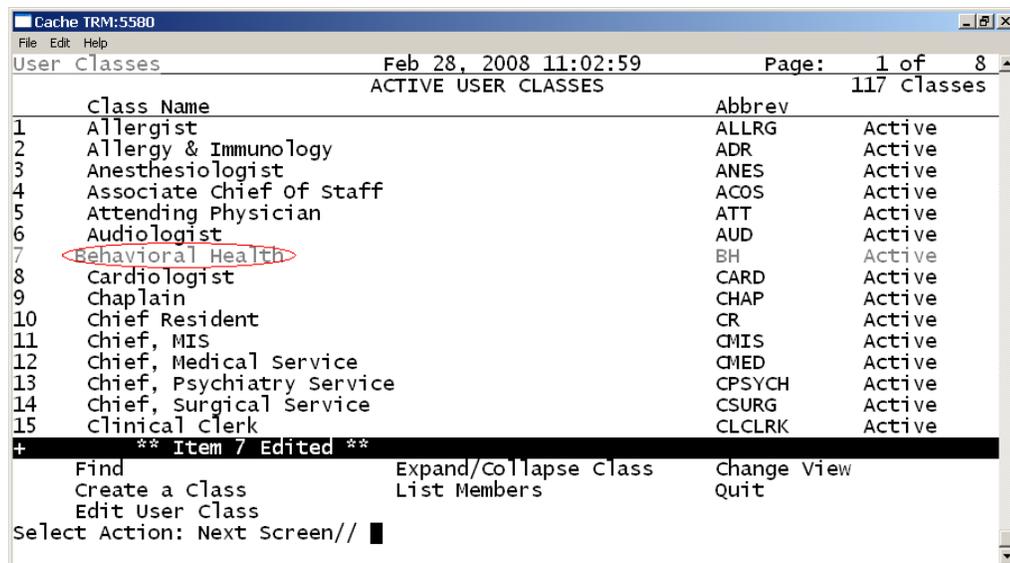


Figure 1-2: Sample List of User Class Names in RPMS

It will only be necessary to create a single User Class of BEHAVIORAL HEALTH.

The desired behavior of the TIU notes is no different for any of the different BH providers. Simply assign all the BH providers this one TIU User Class.

1.4.3 Business Rules Creation

New Business Rules are created for each new Document class using the UCM4 option (Manage Business Rules). This option (UCM4) is found in RPMS by selecting EHR → TIU Configuration → TIU Medical Records → TIU Maintenance Menu.

1.4.3.1 Creating Business Rules for Tier I

Below are the prompts for Business Rules for Tier I:

List Business Rules by DOCUMENT DEFINITION		15 Rules
for DOCUMENT CLASS BH ALL PROVIDERS		
+-----		
1	An UNSIGNED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE VIEWED by a BEHAVIORAL HEALTH	
2	An UNSIGNED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE VIEWED by a CHIEF, MIS	
3	An UNSIGNED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE PRINTED by a BEHAVIORAL HEALTH	
4	An UNSIGNED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE PRINTED by a CHIEF, MIS	
5	An UNSIGNED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE EDITED by a BEHAVIORAL HEALTH	
6	An UNSIGNED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE EDITED by a CHIEF, MIS	
7	An UNSIGNED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE SIGNED by a BEHAVIORAL HEALTH	
8	An UNSIGNED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE SIGNED by a CHIEF, MIS	
9	A COMPLETED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE VIEWED by a BEHAVIORAL HEALTH	
10	A COMPLETED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE VIEWED by a CHIEF, MIS	
11	A COMPLETED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE VIEWED by a PHYSICIAN	
12	A COMPLETED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE VIEWED by a NURSE	
13	A COMPLETED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE VIEWED by a PHARMACIST	
14	A COMPLETED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE PRINTED by a BEHAVIORAL HEALTH	
15	A COMPLETED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE PRINTED by a CHIEF, MIS	
Creating Business Rules for Tier II		

Below are the prompts for Business Rules for Tier II:

List Business Rules by DOCUMENT DEFINITION		12 Rules
for DOCUMENT CLASS BH ONLY BH PROVIDERS		
+-----		
1	An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE VIEWED by a BEHAVIORAL HEALTH	
2	An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE VIEWED by a CHIEF, MIS	
3	An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE PRINTED by a BEHAVIORAL HEALTH	
4	An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE PRINTED by	

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- a CHIEF, MIS
- 5 An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE EDITED by a BEHAVIORAL HEALTH
- 6 An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE EDITED by a CHIEF, MIS
- 7 An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE SIGNED by a BEHAVIORAL HEALTH
- 8 An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE SIGNED by a CHIEF, MIS
- 9 A COMPLETED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE VIEWED by a BEHAVIORAL HEALTH
- 10 A COMPLETED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE VIEWED by a CHIEF, MIS
- 11 A COMPLETED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE PRINTED by a BEHAVIORAL HEALTH
- 12 A COMPLETED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE PRINTED by a CHIEF, MIS