

Behavioral Health EHR

Document Definitions and Business Rules

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.

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

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).

User/Provider Class Definitions

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

Tier I - BH All Providers

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

- Physicians
- Pharmacists
- Nurses

In addition, 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.

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Tier II - BH Only BH Provider

These notes can be viewed, edited, signed, and printed only by the following providers (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.

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.

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 BEH > **TIU** TIU Configuration > **HIS** TIU Menu for Medical Records > **TMM** TIU Maintenance Menu > **DDM** Document Definitions (Manager) > **DDM3** Create Document Definitions.

The notes titles and what tier each belongs to are:

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

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

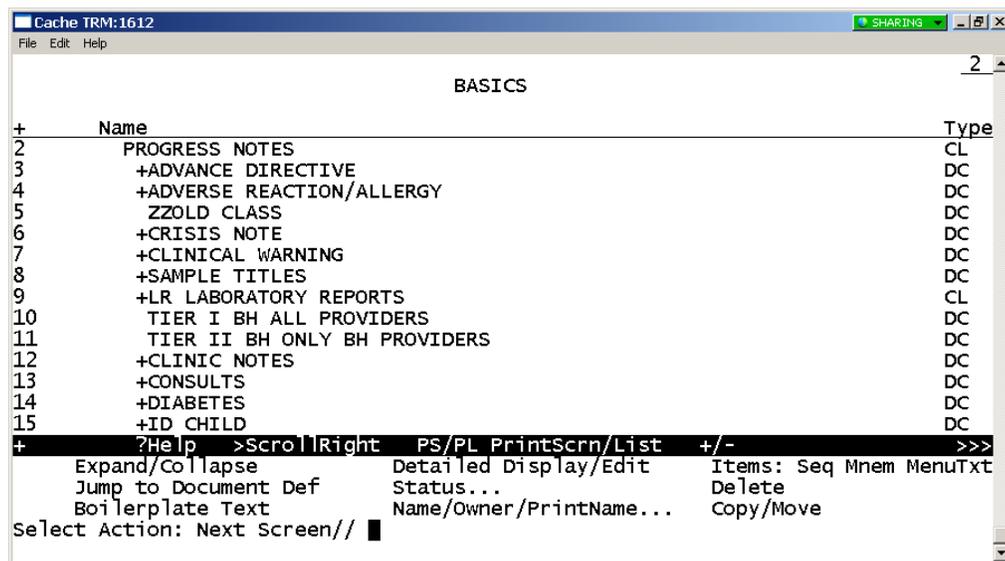


Figure 1: Sample List of Document Classes in RPMS

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

User Class Creation

To create new User Class BEHAVIORAL HEALTH: Use the option **UCM1** (User Class Definition). This option (UCM1) is found in RPMS by selecting **BEH > TIU** TIU Configuration > **HIS** TIU Menu for Medical Records > **TMM** TIU Maintenance Menu > **UCM** User Class Management Menu > **UCM1** User Class Definition.

User Classes		Sep 26, 2012 11:37:57	Page: 1 of 9
ACTIVE USER CLASSES		122 Classes	
Class Name	Abbrev		
1 Alcohol Substance Abuse Provider	ASAP	Active	
2 Allergist	ALLRG	Active	
3 Allergy & Immunology	ADR	Active	
4 Anesthesiologist	ANES	Active	
5 Associate Chief Of Staff	ACOS	Active	
6 Attending Physician	ATT	Active	
7 Audiologist	AUD	Active	
8 +Behavioral Health	BH	Active	
9 Cardiologist	CARD	Active	
10 Chaplain	CHAP	Active	
11 Chief Resident	CR	Active	
12 Chief, MIS	CMIS	Active	
13 Chief, Medical Service	CMED	Active	
14 Chief, Psychiatry Service	CPSYCH	Active	
15 Chief, Surgical Service	CSURG	Active	
+ + Next Screen - Prev Screen ?? More Actions			
Find	Expand/Collapse Class	Change View	
Create a Class	List Members	Quit	
Edit User Class			
Select Action: Next Screen//			

Figure 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.

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 **BEH > TIU** TIU Configuration > **HIS** TIU Menu for Medical Records > **TMM** TIU Maintenance Menu > **UCM** User Class Management Menu > **UCM4** Manage Business Rules

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Creating Business Rules for Tier I

The prompts for Business Rules for Tier I are:

List Business Rules by DOCUMENT DEFINITION for DOCUMENT CLASS BH ALL PROVIDERS		15 Rules
+-----		
1	An UNSIGNED (DOCUMENT CLASS) TIER I BH ALL PROVIDER may BE VIEWED by an AUTHOR/DICTATOR	
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 an AUTHOR/DICTATOR	
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 an AUTHOR/DICTATOR	
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 an AUTHOR/DICTATOR	
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	

Figure 3: Sample List of Tier I Business Rules in RPMS

Creating Business Rules for Tier II

The prompts for Business Rules for Tier II are:

List Business Rules by DOCUMENT DEFINITION for DOCUMENT CLASS BH ONLY BH PROVIDERS		12 Rules
+-----		
1	An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE VIEWED by an AUTHOR/DICTATOR	
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 an AUTHOR/DICTATOR	
4	An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE PRINTED by a CHIEF, MIS	
5	An UNSIGNED (DOCUMENT CLASS) TIER II BH ONLY BH PROVIDER may BE EDITED by a AUTHOR/DICTATOR	
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 AUTHOR/DICTATOR	

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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

Figure 4: Sample List of Tier II Business Rules in RPMS