



ADDICTIONS AND MENTAL HEALTH DIVISION

Kate Brown, Governor



OREGON HEALTH AUTHORITY
ADDICTIONS AND MENTAL HEALTH DIVISION

MOTS
Measures and Outcomes Tracking
System

Client Entry Data Collection
User Guide

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Version 5.1

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1 INTRODUCTION

The Measures and Outcomes Tracking System (MOTS) is a system designed to facilitate data collection of addictions and mental health client treatment data from all publicly funded behavioral health providers across Oregon. In addition to publicly funded providers, all DUII and Methadone treatment providers must also report in MOTS. MOTS will collect status (demographic) and non-Medicaid service data. Status data provides information during the treatment cycle (such as at admission and with updates at least every 90 days), and non-Medicaid service data provides information on services/events within the treatment episode. The collection of this data will allow Addictions and Mental Health (AMH) to focus on outcomes and funding services at the appropriate levels.

By implementing and collecting data through an outcomes measurement system, AMH will acquire information necessary to fulfill its obligation to those entities to which it is accountable, along with ensuring the ability to track metrics that align with broader Oregon Health Authority, Health System Transformation efforts.

1.1 OVERVIEW

The Client Entry User Guide is intended to be a reference guide for accomplishing the work completed by users of the Client Entry Web-based data collection tool. The user guide provides the Client Entry user with clear instruction for navigating the system, requirements for successful data collection, and general tips for data submission.

While this guide provides detailed instructions on how to use MOTS Client Entry, information about each field within MOTS is found in the MOTS Reference Manual located on the MOTS web site in the Resources section: <http://www.oregon.gov/oha/amh/mots/Pages/index.aspx>

MOTS Client Entry is for use by agencies/facilities that wish to enter data directly into MOTS. The Client Entry system, a module, within MOTS, is comprised of several components:

- Client Search- features the ability to search for existing client
- Client Summary- provides all the information on the client and services provided. Page which is the entrance to all client specific information.
- Client Profile Data- has general demographic information on client and must be completed regardless of service provided.
- Behavioral Health Detail Data- provides the behavioral health detail, and must be completed for mental health and addiction services.
- Addiction Detail Data- must be completed for clients served for addiction services, and can also be completed for mental health services.
- Mental Health Crisis Data- will only display if agency/facility provides Mental Health Crisis services, and captures Mental Health Crisis service data.
- Involuntary Services Data- will only display if agency/facility submits data for Involuntary Services, and captures involuntary service data.

- Non-Medicaid Services Data- all will have access to submit this data.

An agency/facility may not have access to all the components mentioned above with the Client Entry tool. Some agency/facilities may only provide outpatient and residential mental health and addiction services, and do not provide Mental Health Crisis and/or Involuntary Services, and would not need access to the components for which they do not provide services.

2 TRAINING FOR INFORMATION INTEGRITY AND CONSISTENCY

To ensure that information collected is of the highest quality, it is critical that everyone who collects, enters, or edits data is adequately trained and knowledgeable about the MOTS Client Entry system and its components. For this reason, AMH requires all Client Entry users receive training prior to using the system. New users must participate in an introductory training session (includes either classroom computer training provided by AMH Staff, live webinars offered monthly provided by AMH staff, or training by trained staff within their agency/facility) and review this guide. The dates for upcoming webinars are available on the MOTS web page located at: <http://www.oregon.gov/oha/amh/mots/Pages/index.aspx>

3 MOTS CLIENT ENTRY CONVENTIONS

Browser: Internet Explorer (10 or higher) and Mozilla Firefox can be used and are supported when working within MOTS Client Entry.

Data Field Entry Order: Always left to right, top to bottom.

Tabs: Tabs are located at the top of the page within the Client Entry tool. These tabs allow ease of movement for the user to locate the data to be completed or updated. Only fields that apply to the data set under the tab will appear.

Drop down boxes: Allows user to type in the first letters of values and values will display that correspond.

Searchable Fields: Enter first few letters of value.

Free Text Fields: Enter information as requested. Example- Last Name: Johnson

User Header: All pages within Client Entry show user identifying information and date, such as User Name, Last and First Name. This information can be found in the top right corner of the each page.

Agency/Facility Header: This information will display on all pages within Client Entry or associated tab to allow user to identify the agency and/or facility for which they are entering data.

Client Header: The Client Summary page and Non-Medicaid Services page will show client identifying information. On all other pages, client can be identified by reviewing the Client Profile page.

Error Messages: Warning and error messages will be in red font and either at the top of the screen, in a pop-up box or attached to the field where the error occurred. Additionally, tabs will display as red if an error message is present with that particular tab. Once corrected, error messages will disappear.

Required fields: Fields that are mandatory for data submissions within Client Entry are dependent on the data submission type (i.e. mental health, addictions, mental health crisis,

involuntary service, non-Medicaid services). Incomplete mandatory fields will display when data is saved or submitted using the error messages format. It is recommended that users review the MOTS Reference Manual for clarity of mandatory fields within the system and data submission type located at:

<http://www.oregon.gov/oha/amh/mots/internalresources/MOTS%20Reference%20Manual.pdf>

All fields in Client Entry are mandatory unless the word Optional or Situational appears next to the data field. Example of Situational: Oregon Driver's License is mandatory for DUUI clients.

Special Characters: Client Entry free text fields can accept only these special characters: hyphen (-), apostrophe ('), and space.

Date Fields: Key in the date using the format MM/DD/YYYY in all date fields. Some date fields can be chosen by calendar icon.

Clickable Rows or Underlined Links: Information within data tables often contains links to more detailed information. The user will know that Data Tables or text is dynamic when they include links that will either:

- a) Highlight when the user's mouse is pointed on it so that the user will be able to click on the entire row, or
- b) Contain underlined text within the row. When text is underlined, the user can click on the text and a hyperlink will take user to additional information.

Save Draft Button: Save Draft button works to save information that is incomplete. User may save information in draft multiple times and the record will be flagged as draft. *Data submission will not be successful until the record is complete and successfully submitted.* Once information is successfully submitted, the Save Draft button will no longer appear on the page as an option.

Submit Button: Submit button will submit/send completed records to the MOTS database.

Back to Client Summary: This button will always take you back to the Client Summary page and the user may lose any changes made if the data has not been successfully submitted or saved as draft.

Mover/Multi-Select fields: Mover/Multi-Select fields allow the user to select multiple answers. The initial field will provide the user with all options/values for the field. User will click on a value to select and the system will move the selected value to the selection box to the right. User can move a selected value back to the initial box by clicking on the value. A value moved back to the initial box will be moved to the end of the value list and list will no longer be in initial sort order.

IMPORTANT NOTE: If user is entering data in a client record, clicking on the **Help** tab will return user to the MOTS Home page and data will be lost. Use the Save Draft button prior to clicking on Help tab.

IMPORTANT NOTE: DO NOT use the **back arrow** at the top of the web page. Always use the Back to Client Summary or Back to Client Search button within the MOTS application. Use of the back arrow at the top of the web page (the browser back button) may not take the user back to where they want to go and the user mostly likely lose the data entered.

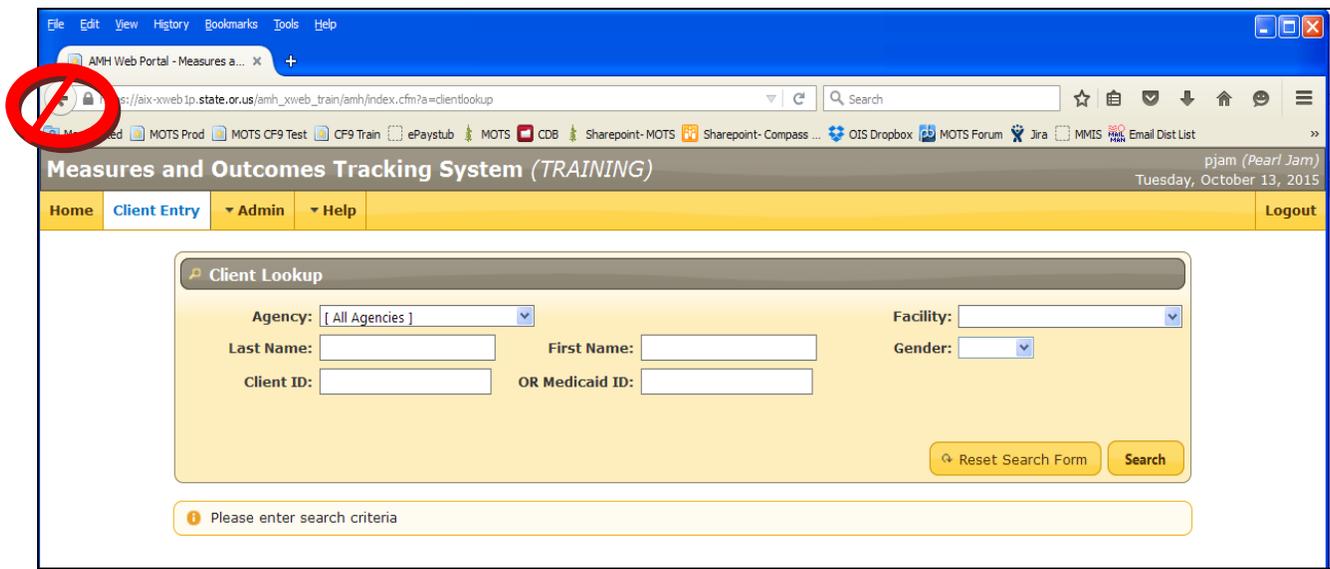


Figure 1 – Sample Page with “Back Button”

4 ACCESSING MOTS

Once the user has a user name (P number), they are ready to access MOTS Client Entry (CE). MOTS CE is a web-based system and can be accessed from any computer that can access the World Wide Web. For initial access to MOTS, all users must access the DHS Citrix portal at <https://dhs.oregon.gov>, where the user will enter their P number and temporary password, and will be prompted to change their password. After the initial access, users will proceed and will also access the MOTS system through the AMH Web Portal at <http://mots.oregon.gov/MOTS>.

1. Open Internet browser.
2. Enter the DHS Citrix portal address in the address line at the top of the browser screen: <https://dhs.oregon.gov>.
3. Enter the P number and the temporary password.
4. The system will prompt the user to change their password and confirm the new password.
5. Once the user has created their unique password, the user will exit the DHS Citrix Portal.
6. Enter the AMH Web Portal address in the address line at the top of the browser screen: <http://mots.oregon.gov/MOTS>
7. Enter user name (P number) and unique password created by the user.
8. Since this is the user’s first time logging into the AMH Web Portal, the system will automatically take the user to the MOTS application, as this is the only application for which the user has access.
9. If the user is unable to enter the AMH Web portal due to password issues, see section [4.1 Reset Password](#) for directions.

AMH Web Portal

User Login

User Name:

Password:

Login Clear Form

Please Enter Your User Name and Password.

HIPAA and 42 CFR Part 2 Security and Confidentiality Notice:

By logging into this system you agree that you have the appropriate authority to view confidential and protected health information.

If your password has expired, and your user name begins with "OR" or "P", please visit <https://dhs.oregon.gov>. If you do not remember your password and need to reset it, please call 503-945-5623.

Figure 2 – AMH Web Portal Login

NOTE: If the user is a first time user of the AMH Web portal, they may not see the other applications listed on the screen below (figure 3). The system framework shares applications with other programs and some users may have other applications from which to choose.

NOTE: If the user is an existing user of other applications within the AMH Web portal, such as AMHI or CPRS, the system will always take the user to the last application they were using and if needed, they may change applications from there. The user will only be able to access MOTS using a P number. The user can get to other applications using this P number if they are granted access to this application by their System Administrator or they can choose to log on to the other applications with a different/original user name and access the other applications.

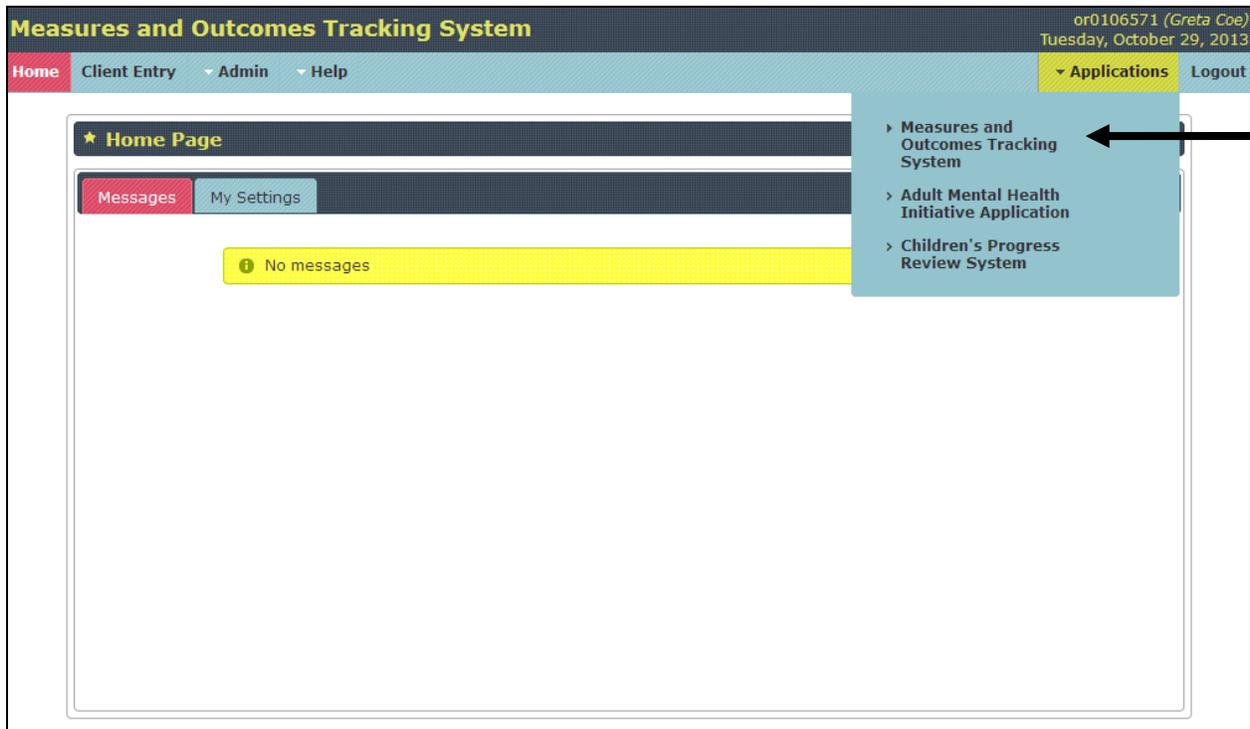


Figure 3 – MOTS Home Page

4.1 RESET PASSWORD

NOTE: Prior to contacting DHS/OHA Service desk, please email MOTS.Support@state.or.us to determine if a password reset is required.

Password reset requests are NOT the responsibility of AMH, or of the Agency or Facility System Admin. Passwords will need to be reset by individual users by contacting the DHS/OHA Service desk at 503-945-5623. The user must know their P number. The Service Desk will reset the password and provide instructions on how to again access the system.

4.1.1 Password Criteria

- All passwords must contain eight (8) characters.
- Passwords contain both alphabetic and numeric characters. All passwords shall contain at least one alphabetic (a – z) and one numeric character (0 – 9).
- Passwords must contain at least one capital letter.
- Passwords shall not be constructed by using personal information or words found in a dictionary. Examples of personal information include a spouse's name, children's names, automobile license plate, social security number, birthday, etc.
- Unsuccessful attempts. After three (3) consecutive, unsuccessful attempts to access the network, the system shall suspend or disable the user's ability to successfully log-on.
- Passwords will expire in 90 days.
- User cannot repeat the last 5 passwords.

For all other password or log-in related issues, report to the agency/facility system administrator.

4.2 EXPIRED PASSWORDS

Passwords within the system will expire within 90 days. When a password expires, it will be the user's responsibility to create a new password.

1. Open Internet browser.
2. Enter the DHS Citrix portal address in the address line at the top of the browser screen:
<https://dhs.oregon.gov>.
3. Enter the P number and the current expired password.
4. The system will prompt the user to change their password and confirm the new password.
5. Once the user has created their unique password, the user will exit the DHS Citrix Portal.
6. Enter the AMH Web Portal address in the address line at the top of the browser screen:
<http://mots.oregon.gov/MOTS>.
7. Enter user name/P number and new unique password created by the user.

See Section 4.1.1 Password Criteria for information on criteria.

[Password Criteria](#)

4.3 MOTS MAIN TABS

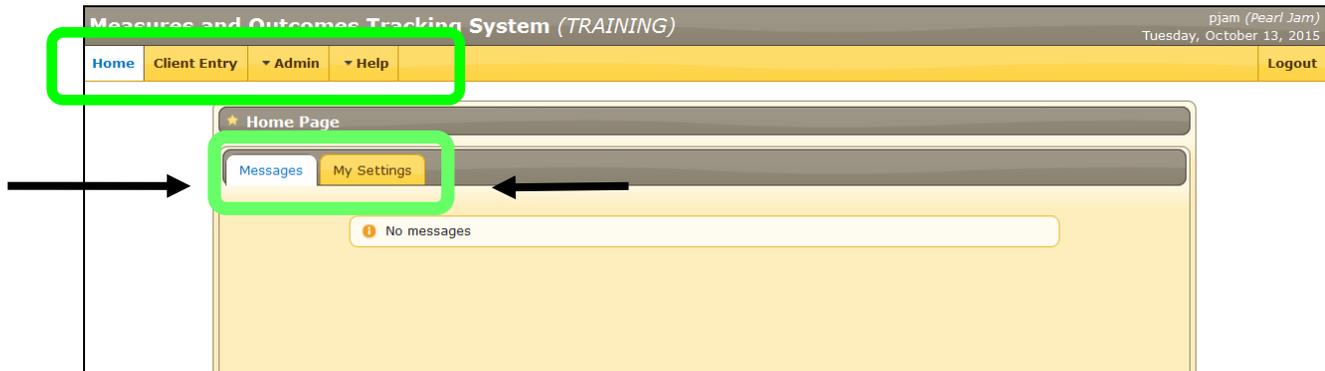


Figure 4 – MOTS Home Page

4.3.1 HOME

4.3.1.1 Messages

This tab is where a user would be able to see messages sent from AMH/MOTS Administration.

4.3.1.2 My Settings

This tab has two functions. "Select Style" allows the user to change the color/background within the system. We recommend that users NOT use the following styles: eggplant, dark hive, le frog, mint chocolate, ui darkness and vadar. It has been discovered that some of the darker colors hinder the user from seeing some of the selected values and field titles.

4.3.2 ADMIN

This tab is intended for an Agency/Facility System Administrator who is authorized to be a System Administrator.

4.3.3 HELP

This tab provides the user with helpful documents and resources to assist with successful MOTS administration and data submission. **Note:** If user is entering data in a client record, clicking on the Help tab will return user to the MOTS Home page and data will be lost. Use the Save Draft button prior to clicking on Help tab.

4.3.4 CLIENT ENTRY

This tab will only be provided to users who have requested the Client Entry tool for data collection and submission. If the user does not submit data using the Client Entry tool, this tab will not be present.

5 ACCESSING MOTS CLIENT ENTRY

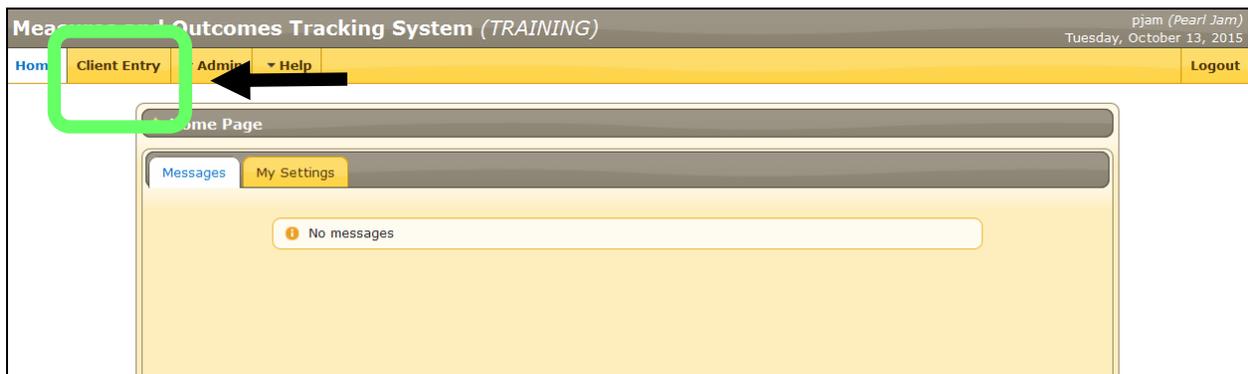


Figure 5 – MOTS Client Entry Tab

1. Log into the AMH Web portal and MOTS. Instructions found under [Accessing MOTS](#).
2. Click on the Client Entry title menu option
3. The Client Entry Client Search page will open.

6 CLIENT SEARCH OR CLIENT LOOK-UP

The Client Search or Look-up page provides the user with the ability to search for a client, select an existing client, or add a new client.

Figure 6 – MOTS Client Entry Client Search Page

1. Search by entering data in any of the fields within the page.
2. Click Search button
3. The bottom half of the page will display search results.
4. If a client name appears below the search section, click on the client name to open the client record. Go to [Client Summary Status Update](#) for further instructions.
5. If the client name searched for does not appear, follow one of two options below:

- Click the Reset Search Form and repeat steps 1-4.
- Click on Add New Client. Go to [Client Summary New Client](#) for further instructions.

Measures and Outcomes Tracking System (TRAINING) pjam (Pearl Jam)
Tuesday, October 13, 2015

Home Client Entry Admin Help Logout

Client Lookup

Agency: [All Agencies] Facility:

Last Name: First Name: Gender:

Client ID: OR Medicaid ID:

Show entries Search:

Last Name	First Name	Middle Name	Gender	DOB	OR Medicaid ID	Client ID	Status
Baggins	Bilbo		Male	12/05/1975	ab12345c	124546	Active
Baggins	Frodo	NA	Male	03/17/1939		cde2468f	Tx Completed
Balbina	Prunella		Female	01/02/1979		8675309	Active

Showing 1 to 3 of 3 entries

Figure 7 – MOTS Client Entry Client Search Results

Hints:

- User can modify the number of search results from 10, 25, 50, or 100 results to display at a time.
- The Reset Search Form will clear all the searchable fields within this page.
- Always search for a client by using the first letter(s) of their first or last name or number of their identification numbers. The Client Entry system does not allow for searching for parts of names or identification numbers other than beginning letters or numbers and does not allow wildcards (**).
- Draft status:** If any of the screens has been saved as draft, the status for the client will be Draft. If you have submitted the client with an Active status and have used Save Draft for a Mental Health Crisis or Involuntary Service, the client status on the Client Lookup screen will be Draft until the screen(s) is submitted for those records.

7 CLIENT SUMMARY PAGE

The client summary page provides a summary level view of the client activities, and is the initial point for all client entries. On a new client, the summary page will be blank (see figure 8) while on an existing client the 4 areas will be completed as applicable (see figure 9).

Within this page, the user will decide the type of treatment information needing to be entered, based on what is applicable to the agency/facility and the client: behavioral health services, MH crisis event or involuntary services event. For example: Non-Medicaid service entry cannot be entered until after behavioral health data has been successfully submitted to MOTS. See figure 9 showing that the client has been admitted for Behavioral Health treatment and is active. The Add Non-Medicaid Service button will be enabled once a behavioral health episode has been successfully submitted.

7.1 NEW CLIENT

The screenshot shows the MOTS Client Entry Client Summary- Blank Page (New Client) interface. The page title is "Measures and Outcomes Tracking System (TRAINING)". The user is logged in as "pjam (Pearl Jam)" on "Tuesday, October 13, 2015". The navigation menu includes "Home", "Client Entry", "Admin", and "Help", with a "Logout" button in the top right corner. The main content area contains five sections, each with a search bar and an "Add" button:

- Agency:** Facility: (with a "Back to Client Search" button)
- Behavioral Health** (with an "Add New Tx Episode" button)
- Non-Medicaid Services**
- Mental Health Crisis** (with an "Add Mental Health Crisis Event" button)
- Involuntary Service** (with an "Add Involuntary Services Event" button)

Figure 8 – MOTS Client Entry Client Summary- Blank Page (New Client)

1. Click on the Add button associated with the service to be entered.

Options:

- Behavioral Health, which includes mental health and addictions, see [Client Profile New Client](#) for further instructions.
- Mental Health Crisis, see [Mental Health Crisis for New Client](#) for further instructions.
- Involuntary Service, see [Involuntary Services New Client](#) for further instructions.
- Non-Medicaid services, in order to submit a non-Medicaid service, client must have a behavioral health record. See [Non-Medicaid Service New Service](#) for further instructions. Non-Medicaid services will not be submitted for Mental Health Crisis or Involuntary Service events.

Hints:

- Depending on what data will be entered into MOTS via Client Entry by an agency/facility, not all agency/facility users may see all the sections on the sample screen above, such as Mental Health Crisis or Involuntary Service.
- The Client Summary page does not collect history and will only display the latest active record within the Behavioral Health section.
- When a current patient goes from 100% Private Pay to Public Funding (including Medicaid) the patient should be entered into MOTS using the original admission date, not the date that public funds started being used to pay for the services.

Example:

Joe started going to the clinic 6/1/2013. His private insurance paid and Joe paid the co-pay for each visit.

Joe's private insurance stopped paying on 5/1/2014 and his services are now covered by public funds or Medicaid.

Joe now needs to be reported into MOTS and his Admission Date should be entered as 6/1/2013.

7.2 STATUS UPDATE (EXISTING CLIENT)

Status updates are updates to existing client records that have been previously submitted to MOTS. From the client summary page, the user will determine which record they want to update and click on that record. The system will open the record, allow the user to update fields that are editable and allow the user to submit a new updated record to MOTS. All pages will allow a client to be updated, except for Mental Health Crisis and Involuntary Services. Once a mental health crisis or involuntary services event is submitted, user cannot edit, update or correct the event. For more information on status data and timeline requirements for submission, see the MOTS Reference Manual.

Measures and Outcomes Tracking System 4 Messages pjam (Pearl Jam)
Monday, November 4, 2013

Home Client Entry Admin Help Logout

Agency: Piet's MH place in Coos Bay Facility: Piet's MH place in Coos Bay

Client: **Jones, Tom** DOB: 01/01/1945 Gender: **Male**
 Client ID: 123
 Medicaid OR Number:

[← Back to Client Search](#)

Behavioral Health

Admission Date	Treatment Status	Submitted Date
10/01/2013	Active	11/02/2013

Non-Medicaid Services

Show 10 entries Search:

Service Date	Procedure Code	Primary Diagnosis	Submitted Date
10/07/2013 -	90804-Psychthrv bhavr mod/supp	Ac alcoholic hepatitis	11/02/2013
11/01/2013 -	90792-Int Psych Eval w/med svcs	Ac alcoholic hepatitis	11/02/2013
11/01/2013 -	90810-Ind. Psych intractve 20-30	Ac alcoholic hepatitis	11/02/2013
11/01/2013 - 11/02/2013	90804-Psychthrv bhavr mod/supp	Ac alcoholic hepatitis	11/02/2013

Showing 1 to 4 of 4 entries [First](#) [Previous](#) 1 [Next](#) [Last](#)

[+ Add Non-Medicaid Services](#)

Mental Health Crisis

Show 10 entries Search:

Service Date	Place of Service	Time of Service	Submitted Date
11/01/2013	Community MH Center	1400	11/02/2013

Showing 1 to 1 of 1 entries [First](#) [Previous](#) 1 [Next](#) [Last](#)

[+ Add Mental Health Crisis Event](#)

Involuntary Service

Show 10 entries Search:

Date of Petition	Service Status	Date of Commitment	Discharge Date	Submitted Date
10/01/2013	Recertification		11/04/2013	11/02/2013

Showing 1 to 1 of 1 entries [First](#) [Previous](#) 1 [Next](#) [Last](#)

[+ Add Involuntary Services Event](#)

Figure 9 – MOTS Client Entry Client Summary Page (Existing Client)

Behavioral Health

1. Click on the treatment episode to be viewed, updated or edited.
2. The Client Profile page of the selected behavioral health treatment episode will open and display. See [Client Profile Status Update](#) for further instructions.

Mental Health Crisis

1. Click on the Mental Health Crisis event to be viewed. See [Mental Health Crisis View](#) for further instructions.
2. Mental Health Crisis events are not editable and cannot be updated, only viewed.

Involuntary Services

1. Click on the Involuntary Service event to be viewed. See [Involuntary Services Status Update](#) for further instructions.
2. Involuntary Service events are not editable and cannot be updated, only viewed.

Non-Medicaid Services

1. Click on the Non-Medicaid service to be viewed, updated or edited.
2. The non-Medicaid Service page of selected service will open and display. See [Non-Medicaid Service Update Service](#) for further instructions.

Hints:

- **Search function within sections:** The search box will allow the user to search within the designated fields in each section (Non-Medicaid Service, Mental Health Crisis and Involuntary Services). Always search for a service by using the first letter(s) or numbers of the field data elements and the system will display results based on the user's search criteria in ascending order within all designated titled fields. The Client Entry system does not allow for the use of wildcards (**).
- If you save one or more of the screens as Save Draft, the client status on the Client Lookup screen will be Draft until you successfully Submit the screens.

7.3 RETURNING CLIENT (RE-OPENING)

The Returning Client feature is when a client has an inactive status in MOTS Client Entry, and has returned to treatment and their record needs to be re-opened. By re-opening a client record, the system will pull the client's records with information from their last status update with minimum fields blanked out. User can then complete the blanked out fields and update the other fields as needed.

Re-opening of records is only available from the Behavioral Health section within the Client Summary page, which includes the Client Profile, Behavioral Health Detail and Addiction Detail pages. All other pages, such as Non-Medicaid Services, Mental Health Crisis and Involuntary Services do not have this option, as they are created as individual events. **Records will only be re-opened if they are less than two (2) years old from the date of last status update.** Otherwise, if a record is more than two (2) years old, the user will not be able to re-open the client and must start a new client treatment record following instructions from [Client Profile New Client](#).

1. Click on the Add New Tx Episode button
2. Last client status record within the Client Profile will open and display. See [Client Profile Returning Client](#) for further instructions.

8 CLIENT PROFILE

Client profile data allows the user to capture demographic and other general information about the client. This segment or tab is always required and must be completed.

8.1 NEW CLIENT

A user must complete all required boxes within the client profile. The user may use the Save Draft button and return to complete the client profile at a later date or continue to another tab (i.e. behavioral health and/or addictions). Once all the required fields within the Client Profile are complete, the user must advance to the behavioral health tab. The exception is for assessment only referenced below under special circumstance.

The screenshot displays the 'Measures and Outcomes Tracking System (TRAINING)' interface. At the top, there is a navigation bar with 'Home', 'Client Entry', 'Admin', and 'Help' options, and a 'Logout' button. The main content area is titled 'Behavioral Health' and contains a 'Client Profile' tab, which is highlighted with a green box and an arrow. Below the tab, there are several input fields and dropdown menus for client information, including Agency, Facility, Last Name, First Name, Middle Name, Last Name/Birth, Date of Birth, Client Treatment Status, Client ID, OR Medicaid Number, Race, Ethnicity, Gender, Marital Status, Veteran, Living Arrangement, Date Living Arrangement Changed, County of Residence, and County of Responsibility. At the bottom of the form, there are 'Save Draft' and 'Submit' buttons.

Figure 10 – MOTS Client Entry Client Profile Page (New Client)

1. The Client Profile tab will open from Client Summary page.
2. Complete all required fields.
3. Click on the Save Draft button or Behavioral Health Detail tab. See [Behavioral Health Detail New Client](#) for further instructions.

Special circumstance:

If the client was seen for an Assessment Only, and the user has selected the assessment only value in the Client Treatment Status field, the user is allowed to submit once the Client Profile is

complete and does not need to complete additional tabs. This is the only circumstance when the Client Profile can be submitted independently of additional tabs being completed.

For questions regarding a specific field, please refer to the MOTS Reference Manual.

Hints:

- Client ID: This is a unique number assigned by the facility.
- Oregon Medicaid Number: also known as Prime number, OR Medicaid ID, Recipient ID, OHP Number, OHA Health Record Number, Client ID or MMIS Client Number. Format will be one of the following configurations. NNNNNNNA, AANNNNNA, AANNNANA, or AAANNNA. This field is optional; however will be required if the expected/actual source of payment is marked as Medicaid/OHP in behavioral health detail tab. Either capital or lower case letters are acceptable, however capital letters are recommended.
- Client Treatment Status: If a client is an existing client and active and then seen for a mental health crisis or involuntary service, the client treatment status field should remain as active for data collection purposes. If you save any screen as Save Draft, the client treatment status will be Draft until the screens are successfully submitted.
- Date of living arrangement change: Situational. Date is only required when user changes value in living arrangement field.
- County of Responsibility: County that holds the contracted services. If there is no contractor, then select the county the client resides in. This field is especially important for a client that has been referred from other neighboring counties.

8.2 STATUS UPDATE (EXISTING CLIENT)

Measures and Outcomes Tracking System (TRAINING) pjam (Pearl Jam)
Friday, October 9, 2015

Home Client Entry Admin Help Logout

Behavioral Health

Client Profile Behavioral Health Detail Addiction Detail

Agency: Facility:

Last Name: First Name: Middle Name:

Last Name/Birth: Date of Birth: Client Treatment Status:
(mm/dd/yyyy)

Client ID: OR Medicaid Number:
Situational

Race: Ethnicity:

Gender: Marital Status:

Veteran:

Competitive Employment

Living Arrangement:

Competitive Employment: Date Living Arrangement Changed:
Situational

County of Residence: County of Responsibility:

[← Back to Client Summary](#) [Submit](#)

Figure 11 – MOTS Client Entry Client Profile Page (Existing Client)

1. Update fields on Client Profile Page.
2. If necessary, continue to the additional tabs available (i.e.; Behavioral Health Detail or Addiction Detail). When updates are complete, click on the Submit button on the current tab.

Hints:

- Date of living arrangement change: Date is only required when user changes value in living arrangement field.

8.3 RETURNING CLIENT

1. Update and complete all fields on Client Profile Page.
2. Continue to the Behavioral Health Detail tab. See [Behavioral Health Detail Returning Client](#) for further instructions.

Hints:

- A few fields will be blank and will require the user to enter current data.

9 BEHAVIORAL HEALTH DETAIL PAGE

Behavioral health detail provides a place for the user to record information pertinent to the client's behavioral health treatment.

9.1 NEW CLIENT

Measures and Outcomes Tracking System (TRAINING) or0102453 (Janelle Jeggie)
Monday, October 12, 2015

Home Client Entry Reporting Admin AMH Admin Help Logout

Behavioral Health Detail

Client Profile Behavioral Health Detail **Addition Detail**

Admission Date: ZIP Code: State of Res:

Estimated Gross Monthly Household Income: Source of Income/Support:

Expected / Actual Source of Payment

AMH County Fin. Assist. Agreemnt
 Medicaid / OHP
 Medicare
 No Charge
 Other
 Other Gov. Payments - Non Medicaid
 Private Health Insurance

Total Number of Dependents: Number of Child Dependents:

Primary Health Insurance:

Referred From

Advocacy Group
 Aging and People with Disabi
 Alc/Drug Eval Screening Spe
 Attorney
 Child Welfare
 Circuit Court
 Comm BH Provider in area

Referred To

Acute/sub-acute psych facili
 Aging and People with Disabi
 Attorney
 Child Welfare
 Comm BH Prov in Area
 Comm BH Prov Out of Area
 Community Housing

Tribal Affiliation

Not Applicable
 Burns Paiute Tribe
 Conf Trbs Coos, Lowr Ump & Siuslaw
 Conf Tribes of Grand Ronde
 Conf Tribes of Siletz
 Conf Tribes of the Umatilla
 Conf Tribes of Warm Srrins

Interpreter: Pregnant:

Highest School Grade Completed:

Tobacco Use: Substance Use Last 90 Days:

Legal Status

30 Day Civil Commitment
 90 Day Civil Commitment
 180 Day Civil Commitment
 Aid and Assist (ORS 161.370)
 DUII Diversion Client
 DUII Convicted Client
 Guardianship (Child Welfare)

Number of Arrests Past Month: *Situational*
 Total Arrests: *Situational*
 Number of DUII Arrests Past Month: *Situational*
 Total DUII Arrests: *Situational*

ODL/OR ID: *Situational* SID: *Optional*

School Attendance Improvement: Academic Improvement: School Behavior Improvement:

Diagnosis: Search: Behavioral

Diagnosis

No Data Found

Global Assessment of Functioning: *Optional* Peer Del Services:

Infectious Disease Risk Assessment:

Treatment Plan Indicator

Education
 Employment
 Housing
 Other

MH Assessed LOC Score: *Situational*
 MH Current LOC: *Situational*

[← Back to Client Summary](#) [Save Draft](#) [Submit](#)

Figure 12 – MOTS Client Entry Behavioral Health Detail - Blank Page (New Client)

1. Complete all required fields.
2. Click on the Save Draft when applicable or Submit button, or user may also click on the Addiction Detail tab, if you need to complete the addiction information on that client (see [Addiction Detail New Client](#) for further instructions).

Hints:

- If the client is just being seen for mental health services, it is not required to complete the Addiction Detail tab.
- N/A options: If a field does not pertain, such as Pregnant for Male clients, use the value N/A.
- Referred from: For accurate reporting purposes, the Child Welfare value must be selected for Intensive Treatment and Recovery Service (ITRS) clients. Additionally, the ADES or one of the court option values must be selected for DUII clients.
- Oregon Driver License: This field will be required if referred from values of DUII Convicted or Diversion is selected.
- School Academic/Attendance/Behavior Improvement: Example: If client is over 25 and/or not in school, select the N/A value.
- Diagnosis: Select and add as many diagnoses as needed. If diagnosis is not determined within 7 days, use code R69 – Illness, Unspecified. If the diagnosis for which you are searching does not appear, change the diagnosis search box to search “Behavioral” or “All” codes.
- Infectious Disease Risk Assessment: If this assessment was not completed by the clinician, select the value of not completed.
- TX Plan Indicator: This field assists with legislative info and outcome measures. The three specific options listed are the choices that AMH/DOJ is currently interested in.
- MH Current LOC: Must be completed for Adult Mental Health Residential Clients. Not required for Addiction only Clients.
- MH Assessed LOC Score: Must be completed for Adult Mental Health Residential Clients. Not required for Addiction only Clients. If the MH Current LOC field is completed, MH LOC Score field will be required.

9.2 STATUS UPDATES (EXISTING CLIENT)

Measures and Outcomes Tracking System (TRAINING) or0102453 (Janelle Jeggli)
Monday, October 12, 2015

Home Client Entry Reporting Admin AMH Admin Help Logout

Behavioral Health

Client Profile Behavioral Health Detail Addiction Detail

Admission Date: 05/02/2015 ZIP Code: 97341 State of Res: Oregon

Estimated Gross Monthly Household Income: 500 Source of Income/Support: Wages/Salary

Expected / Actual Source of Payment

AMH County Fin. Assist. Agreemnt	Medicaid / OHP
Medicare	Self-Pay
No Charge	
Other	
Other Gov. Payments - Non Medicaid	
Private Health Insurance	
Unknown	

Total Number of Dependents: 2 Number of Child Dependents: 1

Primary Health Insurance: Medicaid / OHP

Referred From

Advocacy Group	Attorney
Aging and People with Dis	
Alc/Drug Eval Screening S	
Child Welfare	
Circuit Court	
Comm BH Provider in area	
Community Housing	

Referred To

Acute/sub-acute psych fac	Self Help Groups
Aging and People with Dis	
Attorney	
Child Welfare	
Comm BH Prov in Area	
Comm BH Prov Out of Are	
Community Housing	

Tribal Affiliation

Not Applicable	Burns Paiute Tribe
Conf Trbs Coos, Lowr Ump & Siuslaw	
Conf Tribes of Grand Ronde	
Conf Tribes of Siletz	
Conf Tribes of the Umatilla	
Conf Tribes of Warm Springs	
Cocuille Indian Tribe	

Interpreter: None Pregnant: N/A

Highest School Grade Completed: 10 Tobacco Use: No Substance Use Last 90 Days: No

Legal Status

30 Day Civil Commitment	Aid and Assist (ORS 161.3)
90 Day Civil Commitment	
180 Day Civil Commitmen	
DUII Diversion Client	
DUII Convicted Client	
Guardianship (Child Welfa	
Guardianship (Court)	

Number of Arrests Past Month: 0 *Situational*

Total Arrests: 0 *Situational*

Number of DUII Arrests Past Month: 0 *Situational*

Total DUII Arrests: 0 *Situational*

ODL/OR ID: *Situational* SID: *Optional*

School Attendance Improvement: N/A Academic Improvement: N/A School Behavior Improvement: N/A

Diagnosis: Search: In Use:

Diagnosis	Delete
F4322: Adjustment disorder with anxiety	

Global Assessment of Functioning: *Optional* Peer Del Services: Client Received PDS

Infectious Disease Risk Assessment: Low-to-No Risk

Treatment Plan Indicator

Education	Housing
Employment	Other

MH Assessed LOC Score: *Situational*

MH Current LOC: *Situational*

Back to Client Summary Delete Episode Submit

Figure 13 – MOTS Client Entry Behavioral Health Detail Page (Existing Client)

1. Update fields on Behavioral Health Detail page.
2. If necessary, continue to the additional tabs available (i.e. Client Profile or Addiction Detail tabs) When updates are complete, click on the Submit button on the current tab.

9.3 RETURNING CLIENT

1. Update and complete all fields on Behavioral Health Detail page.
2. Continue to the Addiction Detail tab, if applicable. See [Addiction Detail Returning Client](#) for further instructions.

Hints:

The following fields with the Behavioral Health Detail tab will be blank.

- Admission date, Pregnant, Substance use last 90 days, Primary health insurance, Legal status, Referred from, Referred to.

10 ADDICTION DETAIL PAGE

The addiction detail page provides the user with a place to capture details related to addiction treatment.

10.1 NEW CLIENT

Measures and Outcomes Tracking System (TRAINING) pjam (Pearl Jam)
Tuesday, October 13, 2015

Home Client Entry Admin Help Logout

Behavioral Health

Client Profile Behavioral Health Detail **Addiction Detail**

Substance Problems

	Substance	Age at First Use	Frequency of Use	Usual Route of Administration
Primary	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Secondary	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tertiary	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Positive Alcohol/Drug Tests Past Reporting Period:

Frequency of Attendance in Self-Help Programs:

DUII Completion Date: Situational

Medication Assisted Treatment:

Addiction Assessed Level of Care:

Addiction Current Level of Care:

Children in Residential Treatment with Parents

Child's DOB:

Figure 14– MOTS Client Entry Addiction Detail - Blank Page (New Client)

1. Complete all required fields.
2. Click on the Save as Draft (when applicable), or Submit button.

Hints:

- When “None” is selected for secondary substance of abuse, all remaining fields for secondary and tertiary will auto-populate.
- DUII completion date field is used for DUII clients and not required for other addiction clients. This field can be completed when client has completed DUII requirements and still may be continuing treatment services. Client can have DUII completion date and still be an active client.
- Child in Residential Treatment with Parents only needs to be completed by residential facilities that allow children with parent during treatment.

10.2 STATUS UPDATE (EXISTING CLIENT)

Measures and Outcomes Tracking System (TRAINING) pjam (Pearl Jam)
Friday, October 9, 2015

Home Client Entry Admin Help Logout

Behavioral Health

Client Profile Behavioral Health Detail **Addiction Detail**

Substance Problems

	Substance	Age at First Use	Frequency of Use	Usual Route of Administration
Primary	Marijuana/Hashish	18	No use in the past month	Smoking
Secondary	None	999	Not Applicable	N/A
Tertiary	None	999	Not Applicable	N/A

Positive Alcohol/Drug Tests Past Reporting Period: 0

Frequency of Attendance in Self-Help Programs: 1-3 times in the past month

DUII Completion Date: Situational

Medication Assisted Treatment: None

Addiction Assessed Level of Care: Level 0.5

Addiction Current Level of Care: Level 0.5

Children in Residential Treatment with Parents

Child's DOB: 05/01/2014 [Delete](#)

Figure 15 – MOTS Client Entry Addiction Detail Page (Existing Client)

1. Update fields on Addiction Detail page.
2. If necessary, continue to the additional tabs available (i.e. Client Profile or Behavioral Health Detail tabs). When updates are complete, click on the Submit button on the current tab.

10.3 RETURNING CLIENT (RE-OPENING)

1. Update and complete all fields on Addiction Detail page.
2. Click the Submit button.

Hints:

The following fields with the Addiction Detail tab will be blank:

- Frequency of use, positive alcohol/drug tests past reporting period, DUII completion date.

11 NON-MEDICAID SERVICES PAGE

The Non-Medicaid Services page provides the user a place to record details about the client's non-Medicaid services provided. For more information on which services to report, see the

Policy on Non-Medicaid Service Data Submission at <http://www.oregon.gov/oha/amh/mots/internalresources/Policy%20on%20Non-Medicaid%20Service%20Data%20Submission%20to%20AMH.pdf>

At the bottom of the Non-Medicaid Service page is a Service Summary box. This box will capture all the service data input while the user remains on the Non-Medicaid Service page. Once the user leaves the Non-Medicaid Service page, the information in Service Summary box will no longer display. The information can be found on the Client Summary page under the Non-Medicaid Service section.

11.1 NEW SERVICE

The screenshot shows the MOTS Client Entry Non-Medicaid Services - Blank Page (New Service) interface. The page title is "Measures and Outcomes Tracking System (TRAINING)". The user is logged in as "pjam (Pearl Jam)" on "Friday, October 9, 2015". The navigation menu includes "Home", "Client Entry", "Admin", "Help", and "Logout". The main content area displays the following information:

- Agency: AMH - A Magnificent Healer Facility: AMH - A Magnificent Healer
- Client: **Baggins, Bilbo** DOB: 12/05/1975 Gender: **Male**
- Client ID: 124546
- Medicaid OR Number: ab12345c

The "Non-Medicaid Services" section contains the following fields and controls:

- Date of Service: From To
- Procedure Code:
- Place of Service:
- Modifiers (Situational):
- Number of Units:
- Parent Provider ID:
- Billed Charges \$
- Diagnosis: Search: In Use

The "Diagnosis" table shows "No Data Found". At the bottom of the page, there are three buttons: "Back to Client Summary", "Add Additional Dates", and "Submit".

Figure 16 – MOTS Client Entry Non-Medicaid Services - Blank Page (New Service)

To Enter a Single Non-Medicaid Service

1. Complete all required fields (Date of Service "To" field not required).
2. Click on the Submit button. Note: User cannot Save as Draft while entering Non-Medicaid Services.

To Enter Multiple Non-Medicaid Services

Multiple Non-Medicaid Services must meet the following criteria:

- Be for the same client
- Be from the same facility

- Have the same Parent Provider
- Be in the same month (Date of Service Begin field is required)
- Same Procedure Code
- Same Modifier(s), if modifier(s) are used
- Same Number of Units
- Same Place of Service
- Same Billed Charges
- Same Diagnosis Code(s), including the same Primary Diagnosis Code identified

Steps:

1. Complete all required fields (Date of Service “To” field not required).
2. Click “Add Additional Dates” button to access calendar**

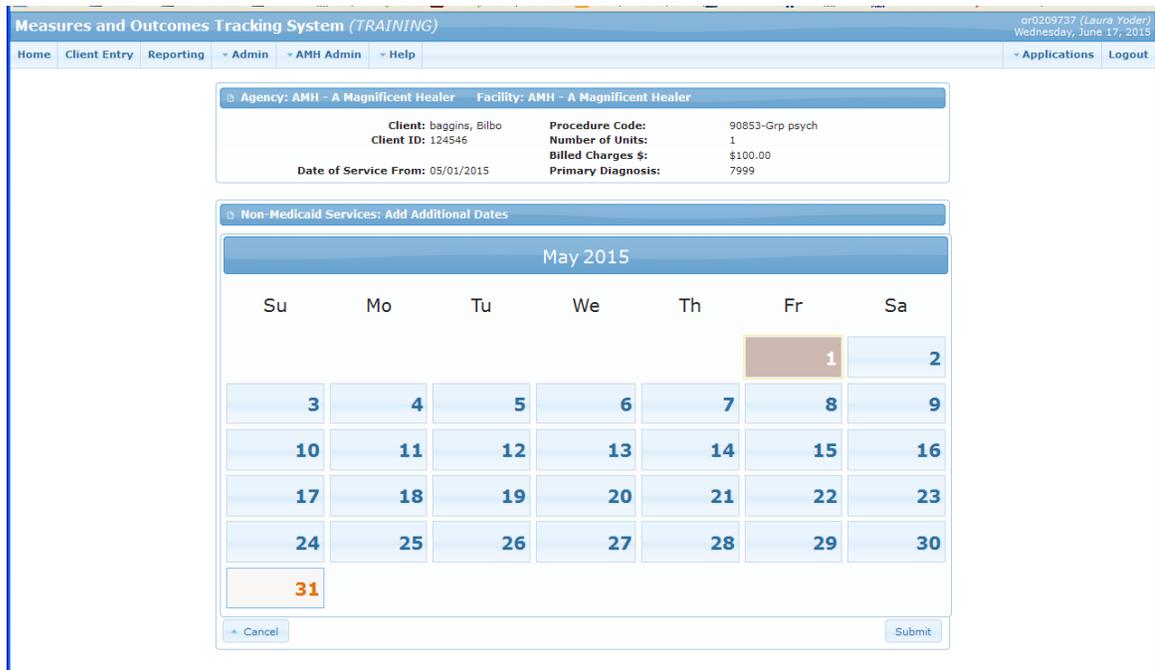


Figure 17 – MOTS Client Entry Non-Medicaid Services – Multi-Select Calendar

3. Select applicable dates for this service
4. Click Submit (A non-Medicaid Service record will automatically be created for each day checked)

**Once the “Add Additional Dates” button is clicked, the first service will be submitted, even if “cancel” button is clicked on the multi-select calendar screen

Hints for Residential Per Diem Services:

- Date Range: MOTS CE has been set up to collect date range for providers in residential facilities to combine residential per diem services together within the date range of the

same month. Complete the From and To date fields. Do not cross months with entries. Service must be the same procedure code, diagnosis, and provided on consecutive days.

- **Number of Units:** This field must be a whole number and must reflect the total number of the same services/same procedure code provided within the corresponding date range. Make sure to calculate complete units for a time period. Rounding may be necessary. See MOTS Reference Manual for more detailed explanation of this feature.
- **Billed charges:** Round this field to the nearest whole number. Do not include decimals. This will be your usual and customary charge rounded to a whole number. The billed charges must reflect the amount charged for all services included within the date range.

General Hints:

- **Modifier:** This field is optional, but can be used with procedure codes. To capture PCIT and EASA clients AMH will be using modifiers for identification. Use modifier HT for EASA related services and TL for PCIT services.
- **Number of Units:** This field must be a whole number and must reflect the total number of the same services/same procedure code provided on a specific date. Rounding may be necessary. See MOTS Reference Manual for more detailed explanation of this feature.
- **Parent Provider ID:** This field is the OR Medicaid Provider number of the organization funding the service. The system will submit the actual number for you; however only the organization name will display.

You will choose one of the Community Mental Health Programs (CMHP) in this drop down if you are contracted or sub-contracted with the CMHP to provide the Non-Medicaid service. You will only choose AMH if you have a direct contract with AMH for the Non-Medicaid service provided.

- **Billed charges:** Round this field to the nearest whole number. Do not include decimals. This will be your usual and customary charge rounded to a whole number.
- **Diagnosis:** Diagnosis options will pull from those “in use” within the Behavioral Health Detail record. If the service is for a diagnosis not displayed, you may add a new diagnosis by first selecting “Behavioral” or “All” from the search drop-down menu. One diagnosis in the service page must be marked as primary for the record. We recommend that if you add a new diagnosis to the Non-Medicaid Services section of the client’s record, that you also add this diagnosis to the Behavioral Health record.

11.2 UPDATING SERVICE

Measures and Outcomes Tracking System (TRAINING) pjam (Pearl Jam)
Friday, October 9, 2015

Home Client Entry Admin Help Logout

Agency: AMH - A Magnificent Healer Facility: AMH - A Magnificent Healer

Client: **Baggins, Bilbo** DOB: 12/05/1975 Gender: Male
Client ID: 124546
Medicaid OR Number: ab12345c

Non-Medicaid Services

Date of Service: From 05/29/2015 To

Procedure Code: 90853-Grp psych

Place of Service: Independent Clinic

Modifiers (Situational)

Number of Units: 1 Parent Provider ID: Washington County

Billed Charges \$ 100

Diagnosis: Search: All

Diagnosis	Primary	
5711 : Ac alcoholic hepatitis	<input checked="" type="radio"/>	Delete

[Back to Client Summary](#) [Submit](#)

Figure 18 – MOTS Client Entry Non-Medicaid Services Page (Edit/Update Service)

1. Update fields within the Non-Medicaid Service page.
2. Click the Submit button.

Hints:

- If a service was entered in error, zero out the billed charges and number of units for that service.
- Previously submitted information will be retained and can be pulled via reports.

12 MENTAL HEALTH CRISIS

A new mental health crisis record will be added for each new event of mental health crisis. Once submitted, Mental Health Crisis information will not be editable nor will the system allow status updates to a crisis record.

A crisis is an event/occurrence. The professional is stabilizing/evaluating and possibly referring the client for treatment. There is no treatment given during a mental health crisis event.

If the provider is seeing the client and providing treatment/services for extended days (example: 3-14 days), then this is a behavioral health treatment episode. The provider should open the client and then inactivate them when services are completed.

NOTE: Client Treatment Status: If a client is an existing client and active and then seen for a mental health crisis, the client treatment status field should remain as active for data collection purposes.

12.1 NEW CLIENT

Measures and Outcomes Tracking System (TRAINING) pjam (Pearl Jam)
Monday, October 12, 2015

Home Client Entry Admin Help Logout

Mental Health Crisis

Client Profile Mental Health Crisis

Date of Service: 09/01/2015 Place of Service: Time of Service:

Referred From

- Advocacy Group
- Aging and People with Di:
- Alc/Drug Eval Screening
- Attorney
- Child Welfare
- Circuit Court
- Comm BH Provider in are

Referred To

- Acute/sub-acute psych fa
- Aging and People with Di:
- Attorney
- Child Welfare
- Comm BH Prov in Area
- Comm BH Prov Out of Ar
- Community Housing

Primary Health Insurance:

Diagnosis: Search: In Use

Diagnosis
No Data Found

Legal Status

- 30 Day Civil Commitment
- 90 Day Civil Commitment
- 180 Day Civil Commitment
- Aid and Assist (ORS 161.370)
- DUII Diversion Client
- DUII Convicted Client
- Guardianship (Child Welfare)
- Guardianship (Court)
- Incarcerated

Presenting Danger

Harm to others:

Harm to property:

Other harm to self:

Suicide:

Back to Client Summary Save Draft Submit

Figure 19 – MOTS Client Entry Mental Health Crisis - Blank Page (New Event)

1. The Client Profile page will display. Complete all required fields.
2. Click on the Mental Health Crisis tab. Complete all required fields.
3. Click on the Save Draft or Submit button.

Hint:

Time of service: Select the hour of day that is closest (nearest) to the time the crisis event occurred.

Diagnosis: If diagnosis is not determined at time of data entry, use code R69 – Illness, Unspecified.

Client Treatment Status: If a client is an existing client and active and then seen for a mental health crisis, the client treatment status field should remain as active for data collection purposes.

12.2 STATUS UPDATE (EXISTING CLIENT)

Once submitted, Mental Health Crisis information will not be editable, nor will the system allow status updates to the crisis record. User may only view existing or previously submitted Mental Health Crisis event records.

The screenshot displays the 'Mental Health Crisis' review page in the MOTS Client Entry system. The page header includes the system name 'Measures and Outcomes Tracking System (TRAINING)', the user 'pjam (Pearl Jam)', and the date 'Tuesday, October 13, 2015'. The navigation menu shows 'Home', 'Client Entry', 'Admin', and 'Help'. The main content area is titled 'Mental Health Crisis' and contains a form with the following fields and values:

- Agency: AMH - A Magnificent Healer
- Facility: AMH - A Magnificent Healer
- Last Name: Jones
- First Name: Tom
- Middle Name: (Optional)
- Last Name/Birth: Jones
- Date of Birth: 03/03/1940 (mm/dd/yyyy)
- Client Treatment Status: Active
- Client ID: T119400303
- OR Medicaid Number: (Situational)
- Race: (List of options including American Indian, Asian, Black or African American, etc.)
- Ethnicity: Cuban
- Gender: Male
- Marital Status: Divorced
- Veteran: Yes
- Competitive Employment: (List of options including Disabled, Homemaker, Full Time, etc.)
- Living Arrangement: Other Private Residence
- Date Living Arrangement Changed: (Situational)
- County of Residence: Wheeler
- County of Responsibility: Wheeler

At the bottom of the form, there are buttons for 'Back to Client Summary' and 'Submit'.

Figure 20 – MOTS Client Entry Mental Health Crisis Page (Review of Submitted Event)

13 INVOLUNTARY SERVICE

An Involuntary Service is a legal process through which an individual with symptoms of severe mental illness may be court-ordered by a judge into treatment in a hospital (inpatient) or in the community (outpatient). An involuntary service event is not a criminal conviction and will not go on a criminal record, however may be recorded even if the client is not committed. This page provides the user a place to record information relevant to involuntary commitments/services.

NOTE: If a client is an existing client and active and then seen for an involuntary service, the client treatment status field should remain as active for data collection purposes.

13.1 NEW CLIENT

Measures and Outcomes Tracking System (TRAINING) pjam (Pearl Jam)
Monday, October 12, 2015

Home Client Entry Admin Help Logout

Involuntary Service

Client Profile Involuntary Service

Date of Petition:

Service Status:

Type of Petition/NMI:

Hearing Recommended:

Reason for Recommending Hearing/Diversion:
Chronic mentally ill
Danger to others
Danger to self
N/A

All of the fields below this line are situational.

Last Date of Diversion:

Disposition by Judge:

Basis for Involuntary Services:
Chronic mentally ill
Danger to others
Danger to self

Date of Commitment:

Length of Commitment: (days)

Service Setting Assigned to if Committed:

[← Back to Client Summary](#) [Save Draft](#) [Submit](#)

Figure 21 – MOTS Client Entry Involuntary Service – Blank Page (New Event)

1. The Client Profile page will display. Complete all required fields.
2. Click on the Involuntary Service tab. Complete all required fields.
3. Click on the Save Draft or Submit button.

Hint:

Client Treatment Status: If a client is an existing client and active and then seen for an involuntary service, the client treatment status field should remain as active for data collection purposes.

13.2 STATUS UPDATE (EDITING AN EXISTING CLIENT)

Once submitted, Involuntary Service information will not be editable, nor will the system allow status updates to the record. User may only view existing or previously submitted Involuntary Service records.

Measures and Outcomes Tracking System (TRAINING) pjam (Pearl Jam)
Friday, October 9, 2015

Home Client Entry Admin Help Logout

Involuntary Service

Client Profile Involuntary Service

Date of Petition:

Service Status:

Type of Petition/NMI:

Hearing Recommended:

Reason for Recommending Hearing/Diversion:

All of the fields below this line are situational.

Last Date of Diversion:

Disposition by Judge:

Basis for Involuntary Services:

Date of Commitment:

Length of Commitment: (days)

Service Setting Assigned to if Committed:

Figure 22 – MOTS Client Entry Involuntary Service Page (Edit/Updated Event)

14 DELETING RECORDS

This functionality is only available to users who have been granted Delete rights. The MOTS Client Entry Delete Client functionality allows MOTS Users the ability to delete a client that was entered into MOTS Client Entry in error. There are also functions to delete just the Addictions Detail section of the Behavioral Health record, a Behavioral Health episode (not the entire client record), a Mental Health Crisis event or an Involuntary Services event. **CAUTION: There is no “undelete” functionality. Once you delete a record, it is deleted and cannot be retrieved.**

14.1 DELETE CLIENT

You will find the Delete option listed under the Admin Tab. **(NOTE: You will not see this option until AMH Admin or an Agency/Facility Administrator grants you access to the Delete Client user role.)**

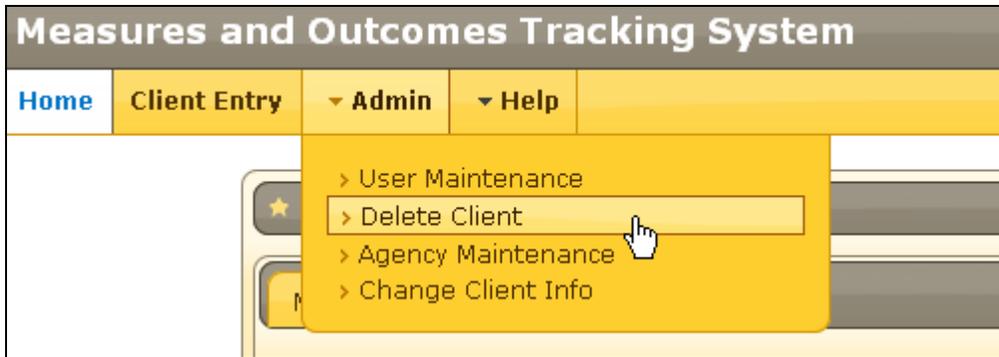


Figure 23 – MOTS Client Entry Delete Client

Once you select Delete Client, you will see a Client Lookup screen with three search boxes. All three data fields are required.

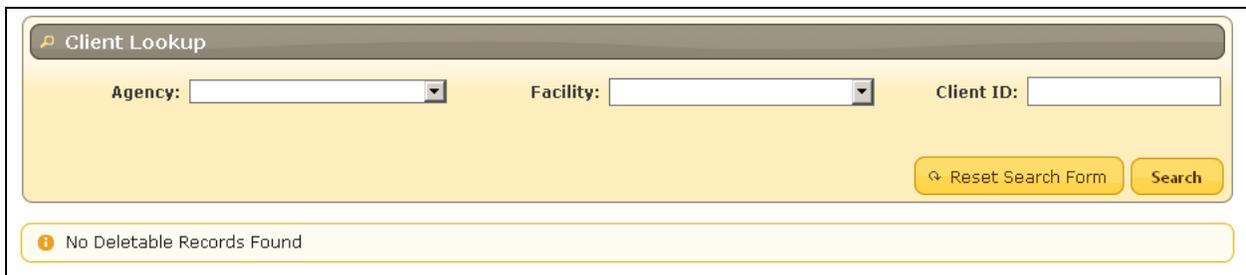


Figure 24 – MOTS Client Entry Delete Client Lookup

Once you have completed the 3 required fields and clicked on the Search button, the client information will be displayed. There may be messages displayed depending on the client record.

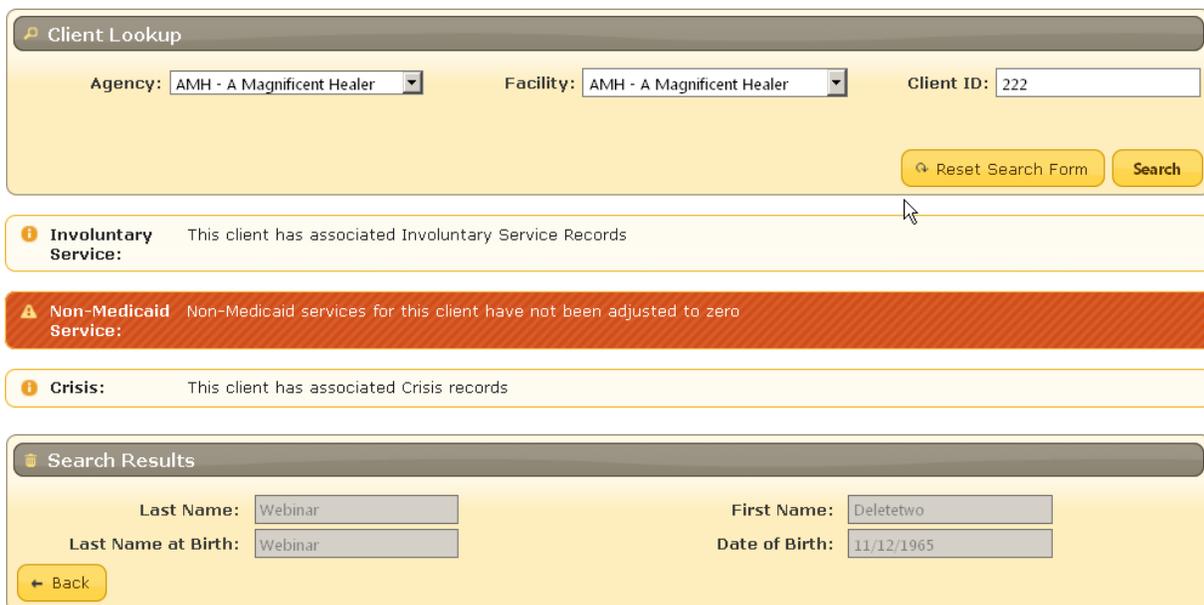


Figure 25 – MOTS Client Entry Delete Client Search Results

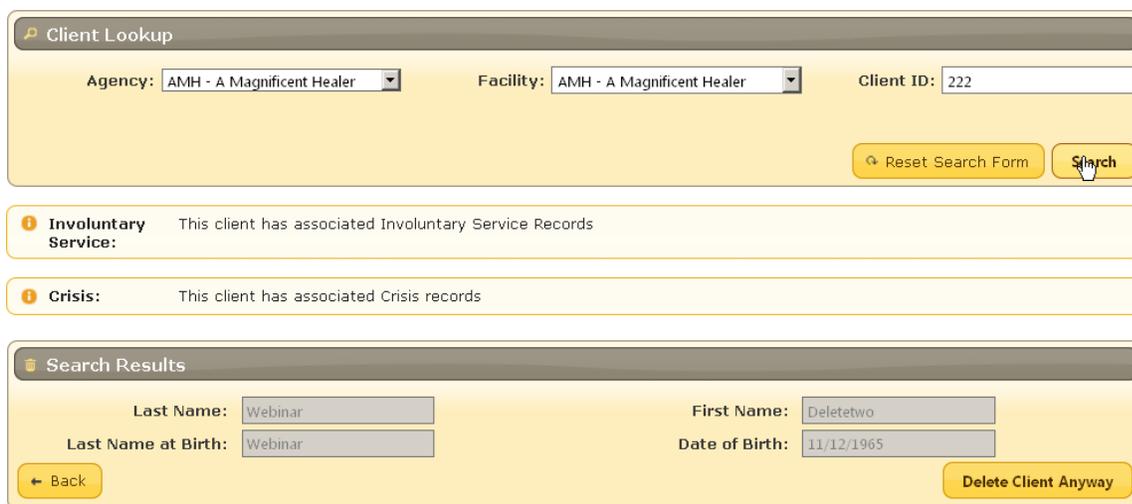
If the client has any Non-Medicaid services in MOTS, you must first zero out the Number of Units and Billed Charges fields.



The screenshot shows a form with two columns of input fields. The left column has 'Number of Units' with the value '4' and 'Billed Charges \$' with the value '100'. The right column has 'Number of Units' with the value '0' and 'Billed Charges \$' with the value '0'. A mouse cursor is pointing at the right side of the form.

Figure 26 – MOTS Client Entry Zeroing Out Non-Medicaid Services

Return to the Delete Client option and enter the search criteria again.



The screenshot shows a 'Client Lookup' form with 'Agency' and 'Facility' set to 'AMH - A Magnificent Healer' and 'Client ID' set to '222'. Below the form are two warning messages: 'Involuntary Service: This client has associated Involuntary Service Records' and 'Crisis: This client has associated Crisis records'. Below these is a 'Search Results' section with 'Last Name: Webinar', 'First Name: Deletetwo', 'Last Name at Birth: Webinar', and 'Date of Birth: 11/12/1965'. A 'Delete Client Anyway' button is visible at the bottom right.

Figure 27 – MOTS Client Entry Delete Client Warning Messages

The messages regarding associated Involuntary Services records and Crisis records are just WARNING messages. The button says “Delete Client Anyway”. When you click on the “Delete Client Anyway” (or Delete Client if there are no associated Involuntary or Crisis records), you will get the following message.

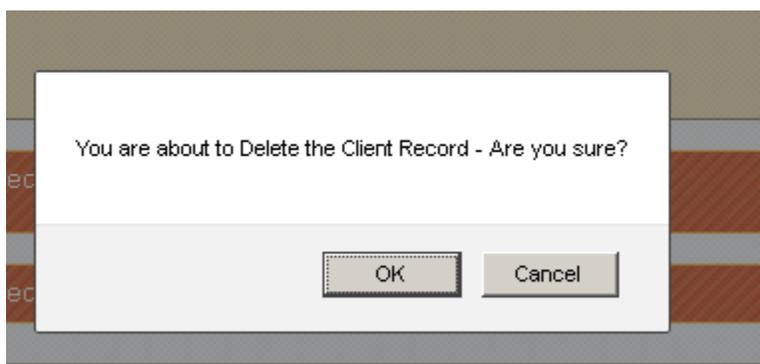


Figure 28 – MOTS Client Entry Delete Client Confirmation

If you click cancel, the delete transaction will be cancelled and you will be returned to the previous screen. If you click OK, the client will be deleted from MOTS. You will see a message “Client Successfully Deleted”. If you do not see this message, the client was not deleted.



Figure 29 – MOTS Client Entry Successful Client Deletion

14.2 DELETE ADDICTIONS DETAIL

This functionality is only available to users who have been granted Delete rights. If data has been entered in the Addictions Detail tab and client is not a substance abuse client, you may need to delete this information. Open the client’s Behavioral Health Record. Click on the Addiction Detail tab to view the information entered. At the bottom right side of the Addiction Detail page you will see the Delete Addiction Info button.

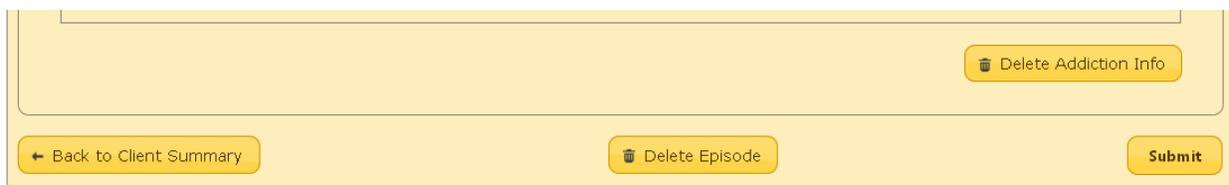


Figure 30 – MOTS Client Entry Delete Addiction Info

NOTE: Use caution because there is also a Delete Episode button on this page. Do not click on the Delete Episode button unless your intent is to delete the entire Behavioral Health episode.

After clicking on the Delete Addiction Info button, you will get a message asking if you are sure you want to delete the Addiction Record.

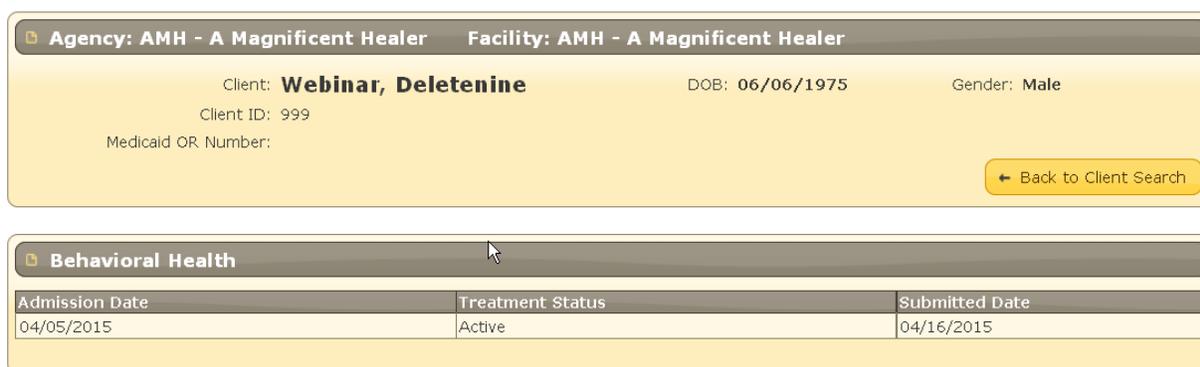


Figure 31 – MOTS Client Entry Delete Addiction Record Confirmation

Click OK to delete the Addiction Detail page. Click Cancel to stop the Delete Addiction Detail transaction.

14.3 DELETE BEHAVIORAL HEALTH EPISODE

This functionality is only available to users who have been granted Delete rights. In the case where a Behavioral Health record has been entered into MOTS in error, you will be able to delete the episode. Find the client in the Client Lookup screen. From the Client Summary page, you will click on the Behavioral Health episode information.



The screenshot shows a client profile page for "Webinar, Deletenine". The client's DOB is 06/06/1975 and gender is Male. The client ID is 999. The agency and facility are both "AMH - A Magnificent Healer". A "Back to Client Search" button is visible. Below this, a "Behavioral Health" section contains a table with the following data:

Admission Date	Treatment Status	Submitted Date
04/05/2015	Active	04/16/2015

Figure 32 – MOTS Client Entry Behavioral Health Episode Information

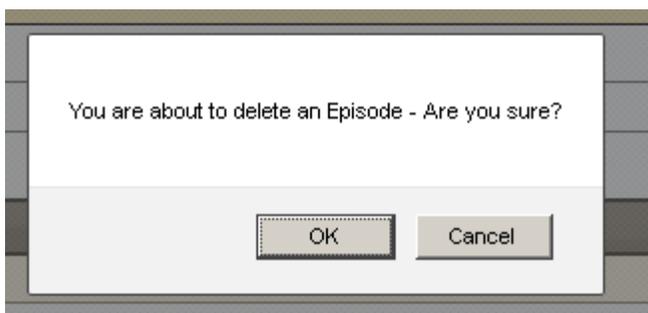
At the bottom of the Client Profile page, you will see the Delete Episode button. This button will be on all pages of the client record.



The screenshot shows the bottom of the client profile page with three buttons: "Back to Client Summary", "Delete Episode", and "Submit". A mouse cursor is hovering over the "Delete Episode" button.

Figure 33 – MOTS Client Entry Delete Episode

Click on the Delete Episode button. You will get the message "You are about to delete an Episode. Are you sure?"



The screenshot shows a confirmation dialog box with the text "You are about to delete an Episode - Are you sure?". Below the text are two buttons: "OK" and "Cancel".

Figure 34 – MOTS Client Entry Delete Episode Confirmation

If you click cancel, you will be returned to the previous screen. If you click OK, the episode will be deleted and you will be returned to the Client Summary page. Note that the details under the Behavioral Health Section now show the information from the previous record.

Agency: AMH - A Magnificent Healer Facility: AMH - A Magnificent Healer

Client: **Webinar, Deletenine** DOB: 06/06/1975 Gender: Male

Client ID: 999

Medicaid OR Number:

← Back to Client Search

Behavioral Health

Admission Date	Treatment Status	Submitted Date
04/01/2015	Left Against Professional Advice	04/16/2015

+ Add New Tx Episode

Figure 35 – MOTS Client Entry Previous Behavioral Health Episode

14.4 DELETE MENTAL HEALTH CRISIS

This functionality is only available to users who have been granted Delete rights. In the case where a Mental Health Crisis event has been entered into MOTS in error, follow the steps below to delete it. Find the client in the Client Lookup screen. In the Mental Health Crisis section of the Client Summary page, click on the particular crisis event to be deleted.

Mental Health Crisis

Show 10 entries Search:

Service Date	Place of Service	Time of Service	Submitted Date
10/01/2014	Office	0700	10/13/2014

Showing 1 to 1 of 1 entries
First
Previous
1
Next
Last

+ Add Mental Health Crisis Event

Figure 36 – MOTS Client Entry Mental Health Crisis

Open the event and click on the Mental Health Crisis tab to validate that this is the one to be deleted. Then click on the Delete Crisis button.

← Back to Client Summary
🗑 Delete Crisis

Figure 37 – MOTS Client Entry Delete Crisis

You will get a message asking if you are sure you want to delete.

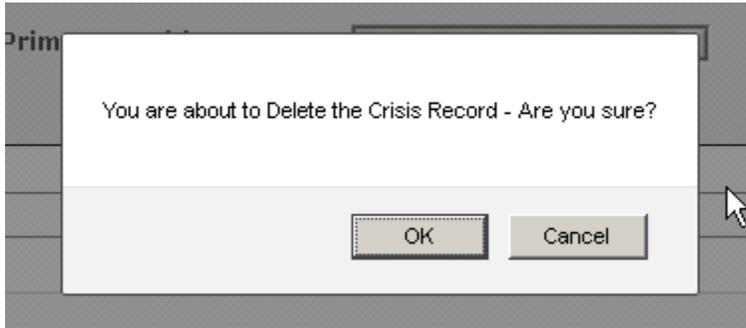


Figure 38 – MOTS Client Entry Delete Crisis Confirmation

Click OK to delete the Crisis event. Click Cancel to stop the Delete transaction.

14.5 DELETE INVOLUNTARY SERVICE

This functionality is only available to users who have been granted Delete rights. In the case where an Involuntary Service event has been entered into MOTS in error, follow the steps below to delete it. Find the client in the Client Lookup screen. In the Involuntary Service section of the Client Summary page, click on the particular Involuntary Service event to be deleted.



Figure 39 – MOTS Client Entry Involuntary Service

Open the event and click on the Involuntary Service tab to validate that this is the one to be deleted. Then click on the Delete Involuntary Service button.



Figure 40 – MOTS Client Entry Delete Involuntary Service Confirmation

You will get a message asking if you are sure you want to delete.

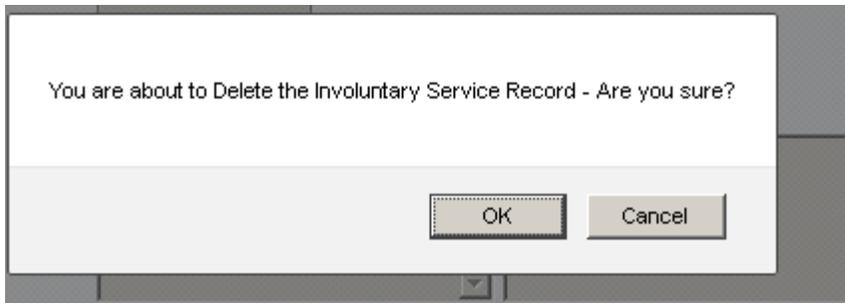


Figure 41 – MOTS Client Entry Delete Involuntary Service Confirmation

Click OK to delete the Involuntary Service event. Click Cancel to stop the Delete transaction.

NOTE: If the Involuntary Service event record (or Mental Health Crisis event record) is the only record in MOTS for this client, you will receive the following message and must use Delete Client to delete this record. See section 14.1 for instructions on deleting clients.

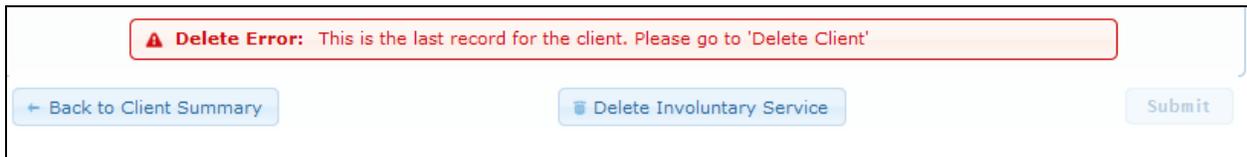


Figure 42 – MOTS Client Entry Delete Error

15 TROUBLE SHOOTING AND TECHNICAL ASSISTANCE

In most cases, Client Entry user issues can be resolved within the agency/facility's internal support system, or by contacting the Agency/Facility System Administrator or designated go-to person.

To request AMH assistance, send an email to MOTS.Support@state.or.us. Include user name and contact information, identifying which Agency/Facility user works with, and give a brief description of the problem. Screenshots are helpful, but please don't include protected health information unless sending the request in a secure email. Ideas for improvements to this Client Entry User Guide are always appreciated.

15.1 DATA CORRECTION REQUESTS

From time to time, errors are made in MOTS Client Entry. Most fields can be corrected by MOTS users. However, there are four (4) MOTS fields that must be corrected by AMH Admin staff.

- Date of Birth
- Last Name at Birth
- Admission Date
- Client ID

If changes are needed to any of these fields, the Agency/Facility System Administrator should send a *secure* e-mail to MOTS.Support@state.or.us with the following information:

- Agency Name
- Facility Name
- Client Name
- Client ID
- Original DOB, Last Name at Birth, Admission Date, or Client ID as shown in MOTS (whichever field is applicable)
- Corrected field information

16 TERMS AND DEFINITIONS

Terms	Description
Addiction Detail	Tab within Client Entry that contains data fields specific to addiction treatment only.
AMH	Addictions and Mental Health (primary stakeholder)
Behavioral Health Detail	Tab within Client Entry that contains data fields for mental health and addiction treatment.
Client Entry	A web-based data entry tool created by AMH for use by addictions and mental health providers who prefer to directly enter their data into MOTS instead of sending an electronic file.
Client Profile	Tab within Client Entry that contains client general information and must be completed for all treatment type services.
CMHP	Community Mental Health Program
Data Submission Method	The way a facility will be sending data to MOTS. Options include: 1) using the Client Entry tool, 2) sending a file created from an agency/facility's existing electronic health (EHR) record system to MOTS.
EDI	Electronic Data Interchange. The method by which an electronic file is created and sent to MOTS.
Involuntary Services	An involuntary service is a legal process through which an individual with symptoms of severe mental illness may be court-ordered by a judge into treatment in a hospital (inpatient) or in the community (outpatient). An involuntary service event is not a criminal conviction and will not go on a criminal record, however may be recorded even if the client is not committed. Involuntary Services is also a tab within Client Entry that contains data fields for Involuntary Services.
MAP	Medical Assistance Program, formerly DMAP
Mental Health Crisis	Emergency psychological care aimed at assisting individuals in a crisis situation to restore equilibrium to their bio-psychosocial functioning and to minimize the potential for psychological trauma. Crisis can be defined as one's perception

	<p>or experiencing of an event or situation as an intolerable difficulty that exceeds the person's current resources and coping mechanisms.</p> <p>MH Crisis is also a tab within Client Entry that contains data fields for Mental Health Crisis events.</p>
MOTS	Measures and Outcomes Tracking System
Non-Medicaid Services	<p>Non-Medicaid services are procedures given to a client where those procedures are paid for with public funds, none of which include Medicaid.</p> <p>Also tab within Client Entry that contains data fields for services provided.</p>
OWITS	OWITS is an electronic health record system that AMH currently manages. OWITS is an option on the data submission method request screen.
Status Data	Status Data includes initial admission information and demographics on the client, and then any updates and/or changes in the client's status or record. This is similar to what has historically been collected for CPMS.
User name	The unique user name given to an individual that, along with their password, allows them to log into MOTS. For MOTS, the User name is a P Number issued by DHS/OHA Service Desk.