ROADS Portal Training Labs

This lab document serves as instructions for Portal System Training labs for attendees to complete during the training session. The intent of this document is to help participants get started by clearly defining each step of common tasks in the ROADS portal.

Note: Some tasks expected in the portal will not be included in this lab document. For individual segment instructions, please refer to our supplemental training materials available on the ROADS website.

To have a successful experience in the train environment, you will need:

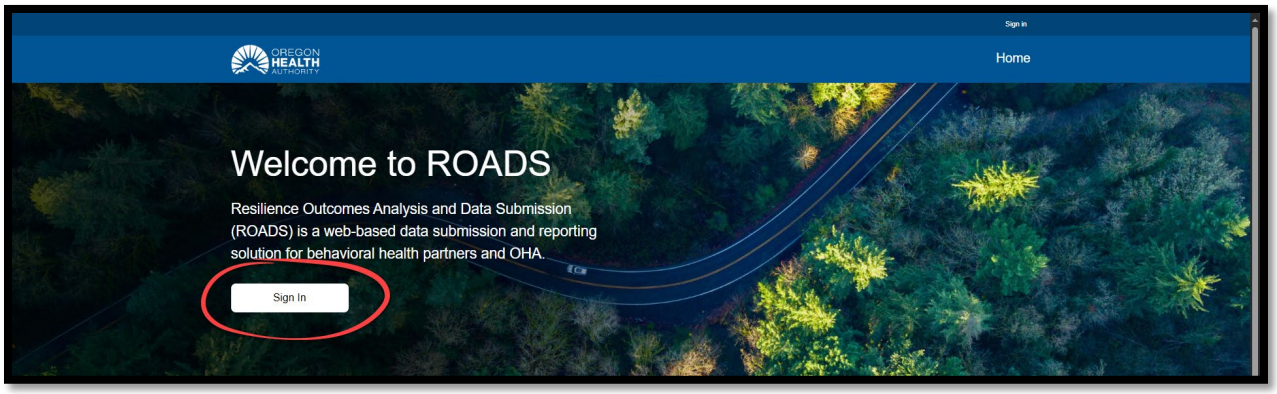
1. **Your UPN (state email) - ends with @odhsoha.oregon.gov**
2. **A current Password (the same password you used to configure MFA)**
3. **Have MFA already configured**

If your password is not current, please call service desk at **503-945-5623 ext. 1.**

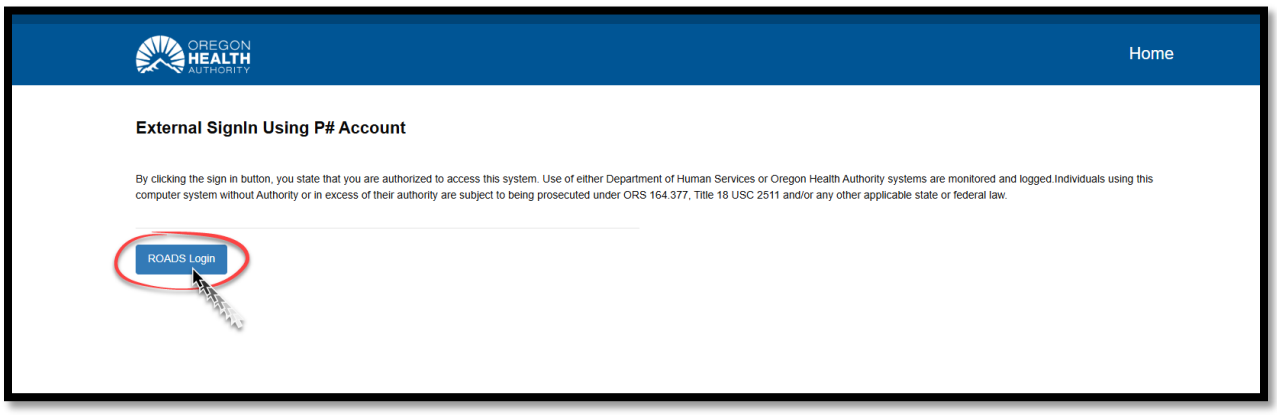
to have them assist you in resetting your password.

LOGGING INTO THE ROADS TRAIN ENVIRONMENT

1) Open an private browser window. Ideally in Google Chrome or Microsoft Edge browsers.
    a. For instructions for how to open a private browser, click here.
2) Copy/Paste the following link into the address bar of the private browser window
    a. Portal - Train Environment[1]
3) Click **Sign-In**



4) You will likely be prompted to click **ROADS Login**



[1] Portal: https://oha-hsd-roads-train.powerappsportals.us/

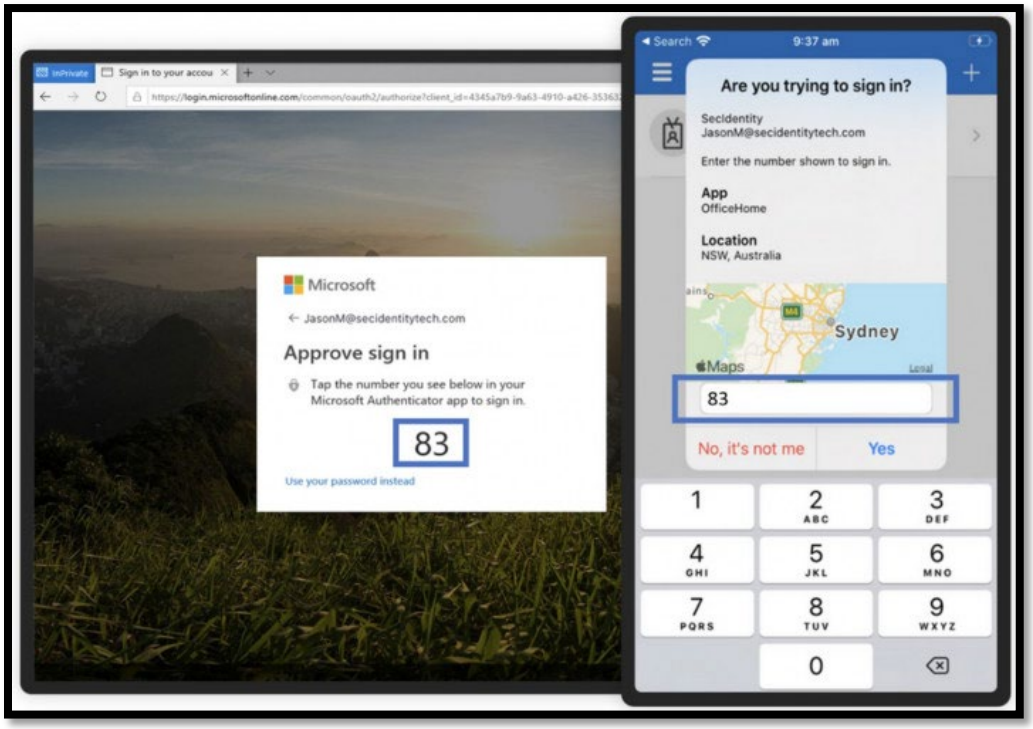
5) When you see this screen, enter your **UPN (XXXX.XXX@odhsoha.oregon.gov)** and click **Next**



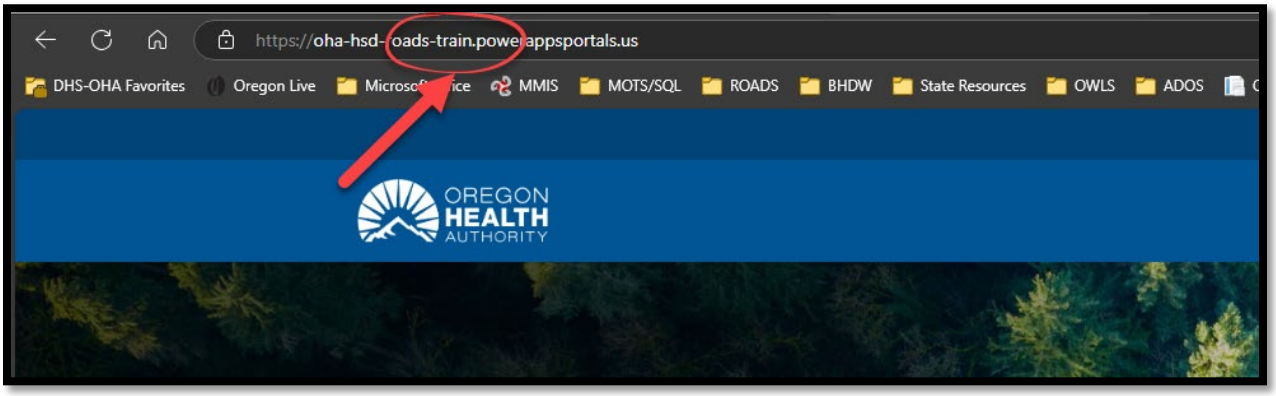
6) Next, type in your password and then click **Sign in**



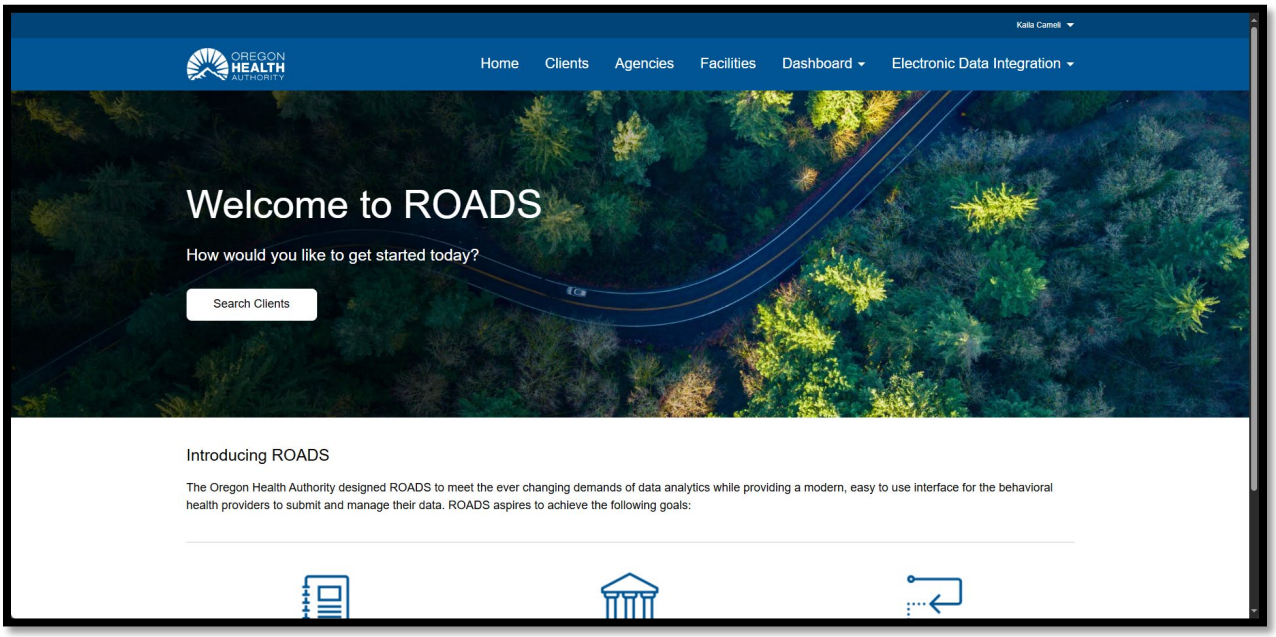
7) You will be prompted to verify your identity via Multi-Factor Authentication.



8) Once you are logged in, verify you are in the Train Environment by looking at the URL



9) After successfully logging in, you should see this welcome screen



You are now ready for Lab 1!

LAB 1: CREATING A DRAFT CLIENT

*You have Write Access to **Demo Breakout Facility**. For this breakout session you will be practicing Write capabilities.*

To prepare to add a client, you need to have two unique (and fake!) identifiers.

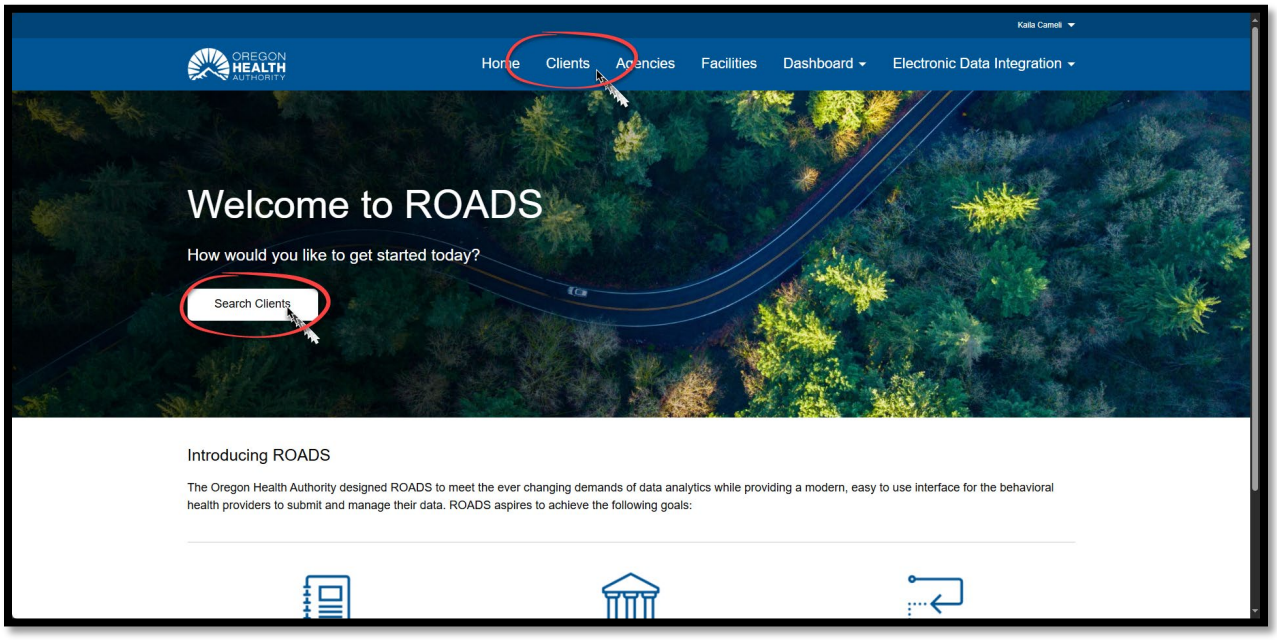
1) **A fake name for your Train Client.**
   a. **It could be a favorite fictional character, the name of a pet, or the name of a cartoon. If you can't think of one, you can use: the name of the street you grew up on + the name of your favorite color.**
2) **A fake Date of Birth (DOB).**

Write this information down (fake client Name and DOB), as you will use this fake client throughout the duration of training.

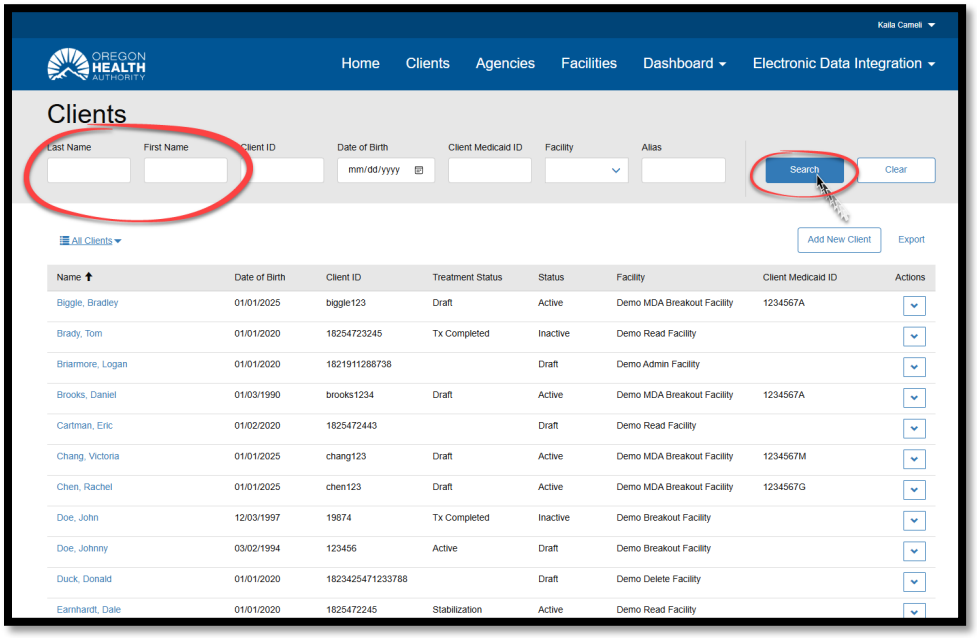
As a reminder, NO REAL INFORMATION should be put into the train environment!

CREATE A DRAFT CLIENT

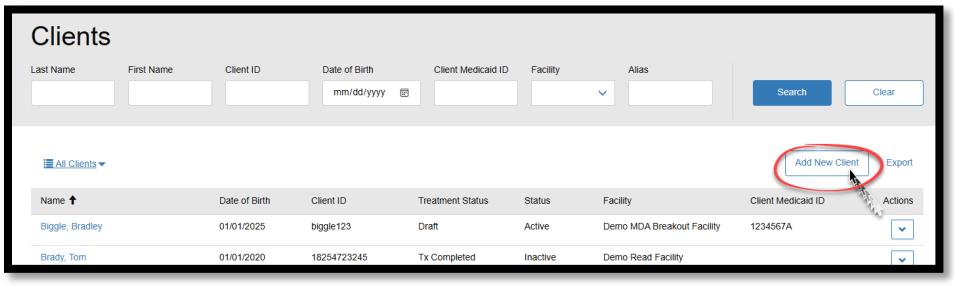
1) Click **Clients** in the top ribbon or click the white **Search Clients** button in the middle of the page.



2) Search for the name of your client to ensure they are not already in the system. Type in the **Last Name or First Name** of your client into the name field(s), then click **Search**.

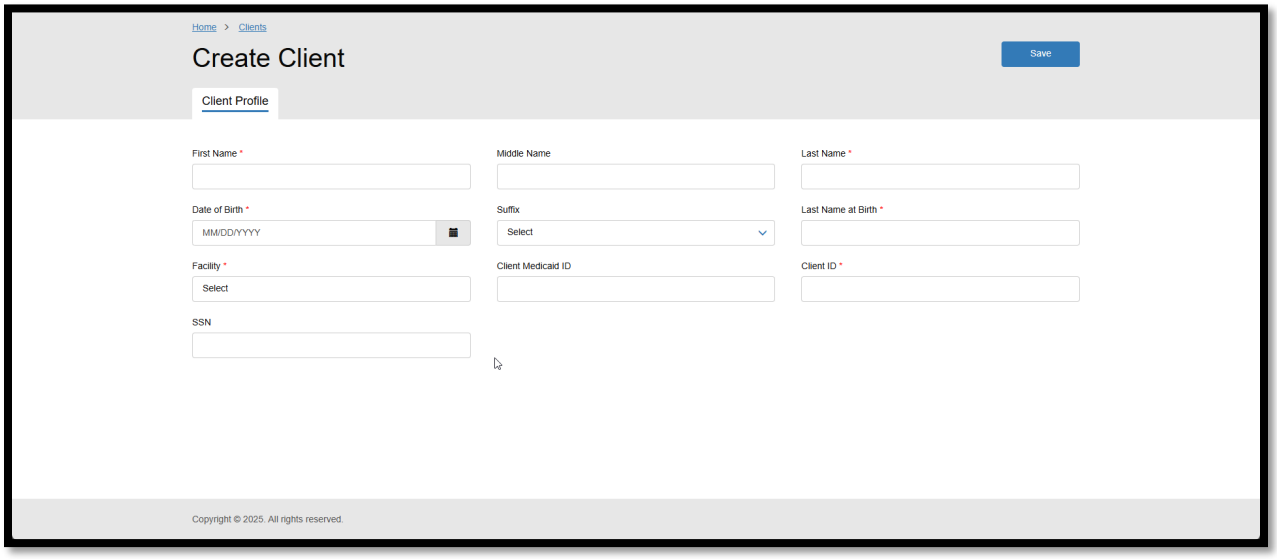


3) If your search result does not pull up your fake client, click **Add New Client**. If it pulls up a client, adjust your clients name so it does not match any current client.

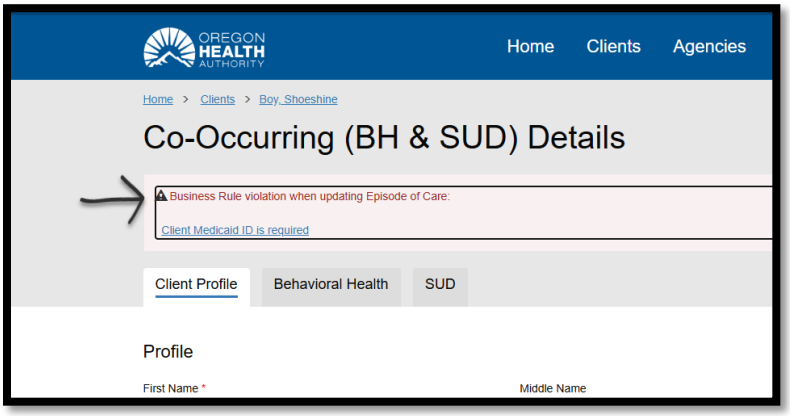


4) Fill out the required Client Profile fields with the data provided below, in combination with your fake client data.
   - First Name: **Fake First Name**
   - Middle Name: *Optional
   - Last Name: **Fake Last Name**
   - Date of Birth: **Fake Date of Birth**
   - Suffix: *Optional
   - Last name at birth: **Fake Last Name**
   - Facility: Select **Demo Breakout Facility**

- Client Medicaid ID (conditional): **Fake Medicaid ID**
  - A= Alpha (letter) N = Numeric (Number) AANNNNNA
  - Example: AB12345C (2 Letters, 5 numbers, 1 letter)
- Client ID: **Fake Client ID**
  - Use your favorite number + the first 2 letters of your favorite food.
  - Example: 12BA (12 + Banana)
- SSN: *Optional (🚫Do NOT use real SSN!)



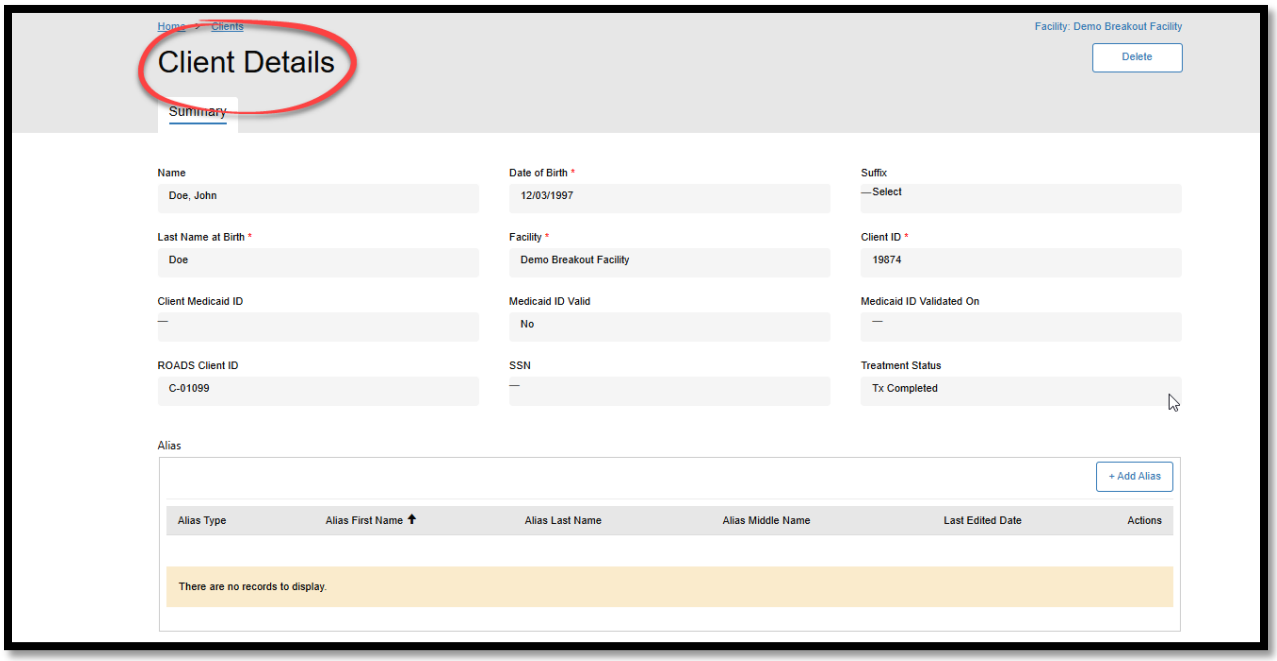
If you make an error, a business rule violation window will pop up upon submission. Click the blue hyperlink describing the error and the system will mark the field in red that needs attention. It will look like this ↓



5) After you have filled out the fields listed above, click **Save**



6) If your client saves correctly, you should see this **Client Details** screen



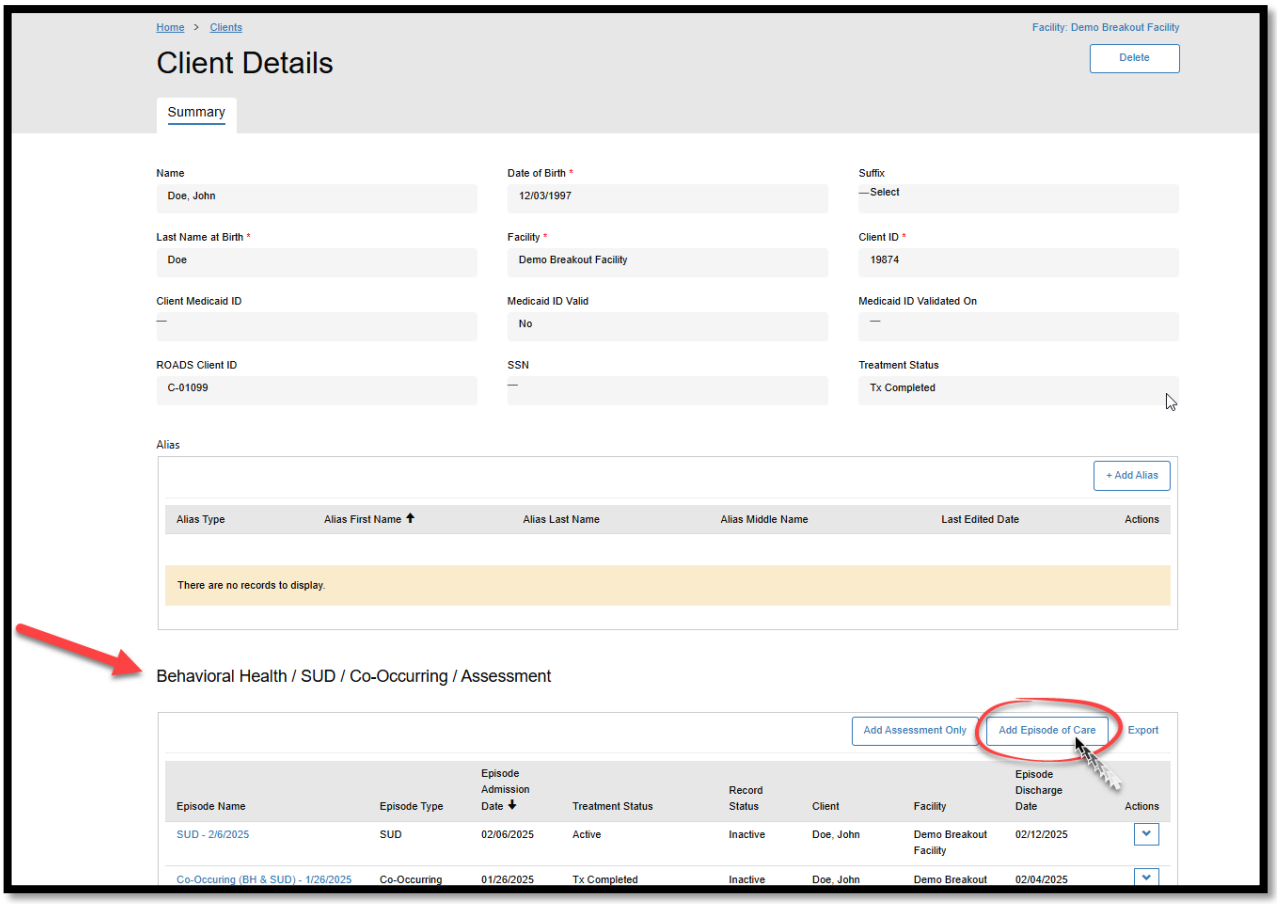
7) If all the fields pass the business rules validation, this will open the Client Details page where you will see all data types available to you:
   a) Summary
   b) Alias sub-grid
   c) Behavioral Health/SUD/Co-Occuring/Assessment sub grid
   d) Non-Medicaid Services sub grid
   e) Mental Health Crisis/Mobile Crisis sub grid
   f) REALD sub grid
   g) Stabilization Services sub grid



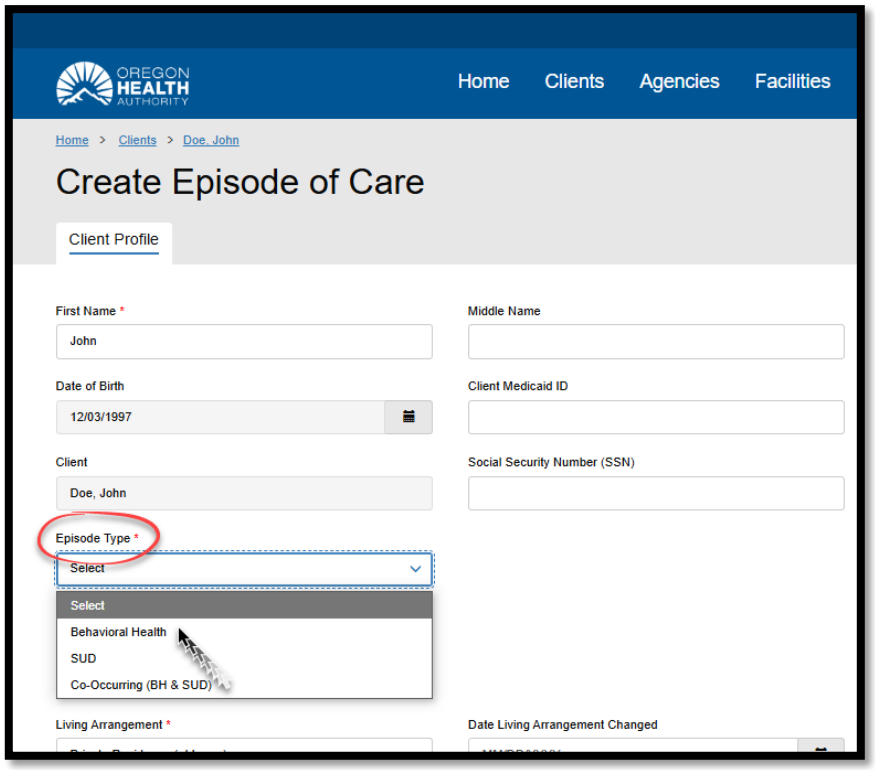
YOU HAVE SUCCESSFULLY CREATED A DRAFT CLIENT!

CREATE AN EPISODE OF CARE

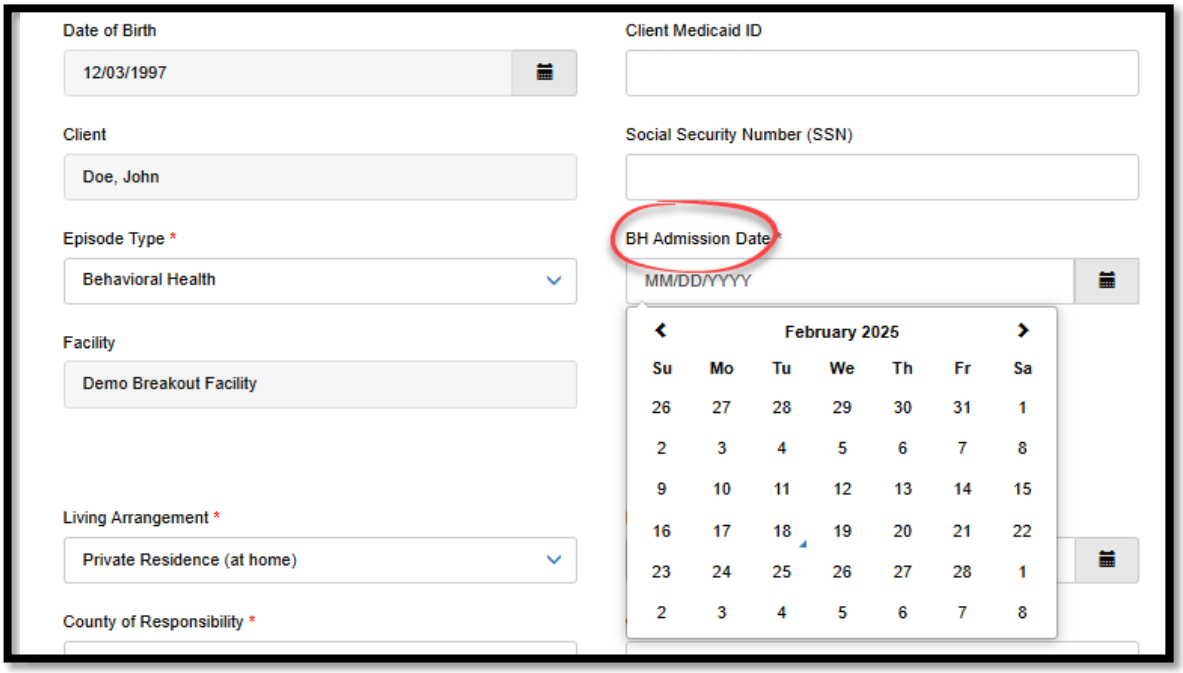
1) From the Client Details screen, scroll down to the **Behavioral Health / SUD / Co-Occurring / Assessment** sub-grid and click **Add Episode of Care**.



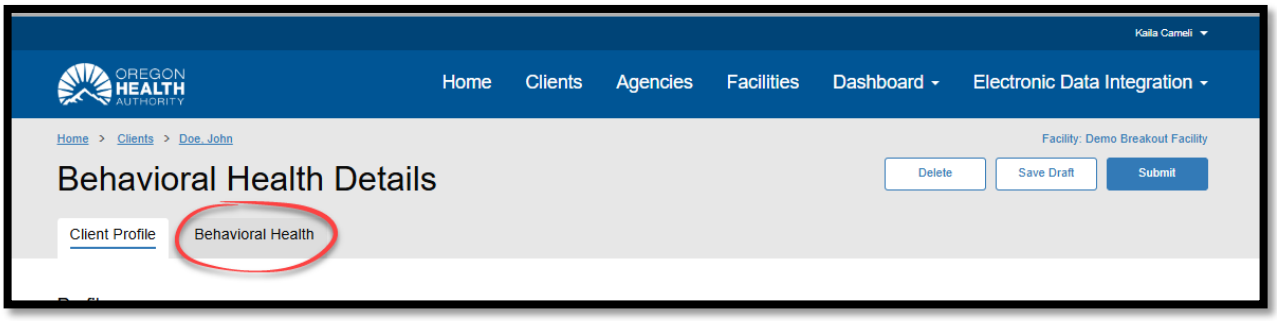
2) Locate the **Episode Type** field and select **Behavioral Health** from the drop-down



3) When you click **Behavioral Health** a new field (BH Admission Date) will appear to the right. Use **July 15th** for the **BH Admission Date**



4) Click **Continue** at the top of the screen.
    - The page will refresh and show a new tab called “Behavioral Health”



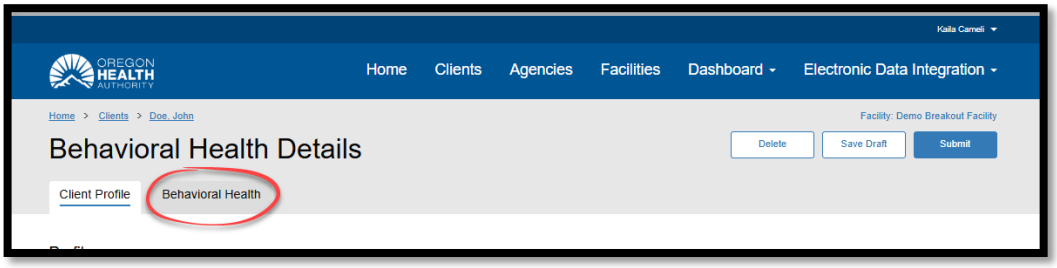
5) We can now continue to fill out the fields on the **Client Profile** tab, as additional fields have been added
    - Living Arrangement: **Private Residence (at home)**
    - Date Living Arrangement Changed: **Leave Blank**
    - Marital Status: **Never Married**
    - County of Responsibility: **Lane**
    - County of Residence: **Lane**
    - State of Residence: **OR**
    - Zip Code of Residence: **97506**
    - Veteran: **No**
    - Competitive Employment: **Part Time**
        - To see options for this type of drop down, click the small arrow on the right of the field



----- Demographics ------

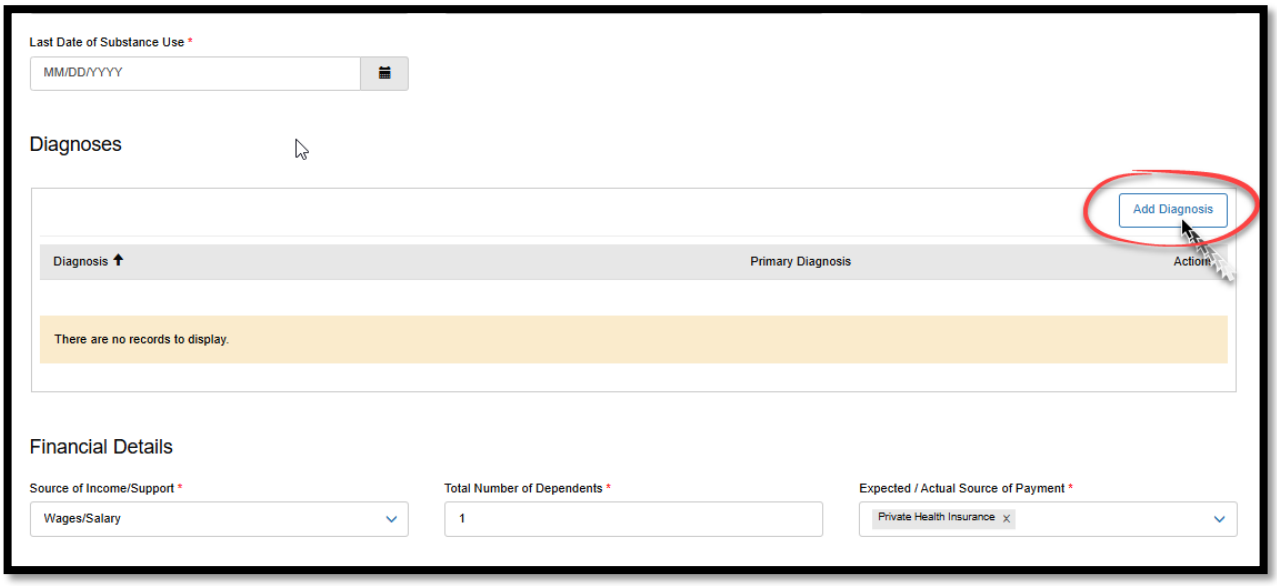
- Tribal Affiliation: **Any**
- Race Ethnicity Identity: **Any**
- Primary Race Ethnicity: **Any**
- Gender Identity: **Any**

6) Once you've entered this data, click on the **Behavioral Health** tab

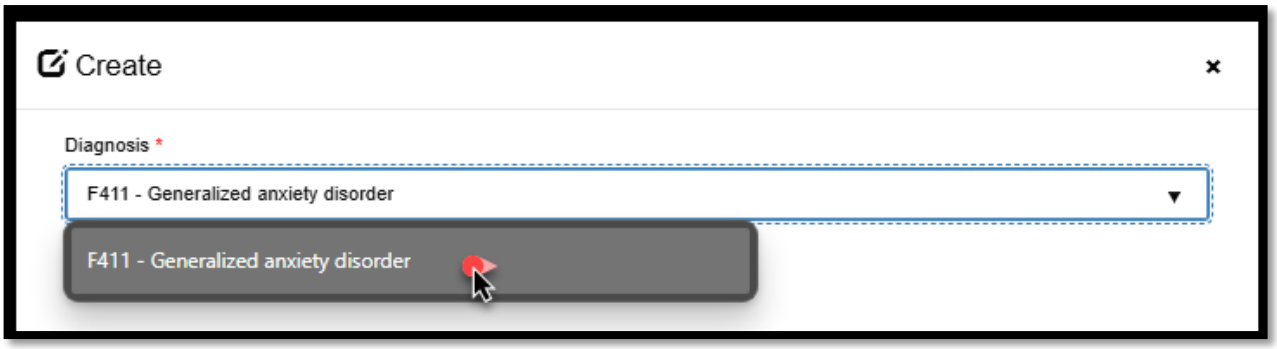


7) Fill out the following fields in the Behavioral Health Details segment:
   - Peer Delivered Services: **Not Applicable**
   - Treatment/Service Setting: **BH OHA Funded/Operated Community Based Program**
   - Years of Education: **2 Years of College/University or associate degree**
   - Pregnant: **No**
   - Tobacco Use: **Yes**
   - Rendering Provider ID: Leave blank*
   - Client Last Contact Date: Leave blank*
   - Substance Use Reported: **Yes**
   - GAF Score: Optional (must be a number 1-100)
   - Last Date of Substance Use: **One week from today**

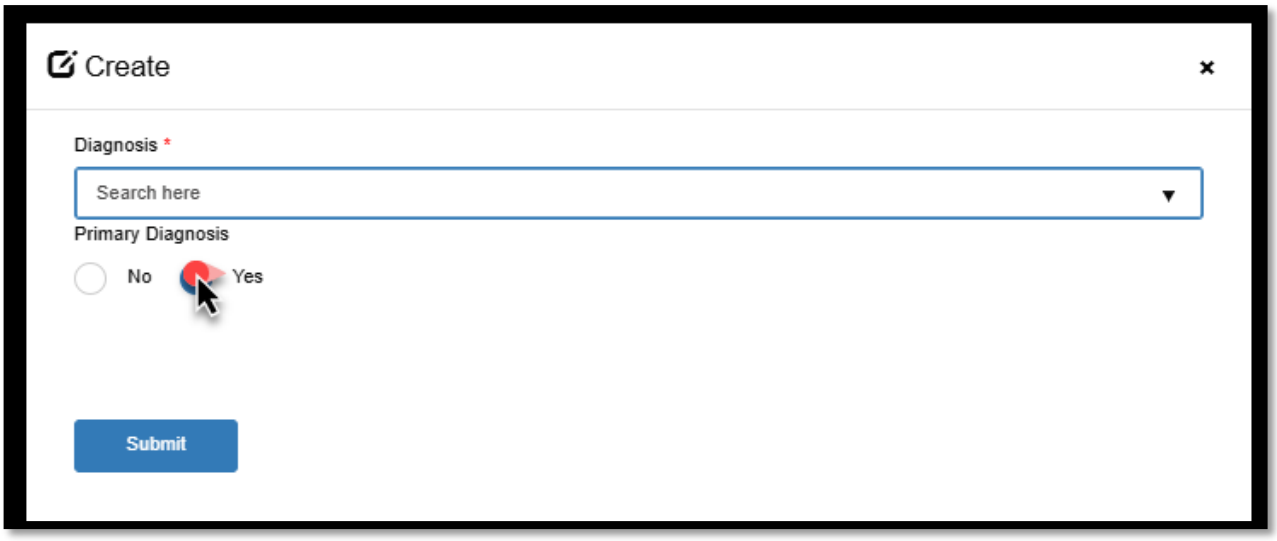
8) To fill out the Diagnosis Sub-grid, click **Add Diagnosis.**
   - Notice there are no records to display here currently.



9) Type **F411**, select **Generalized Anxiety disorder**
   - *You can also type in any part of the diagnosis and it should pull up in the dropdown*



10) For **Primary Diagnosis**, click the **Yes** button



11) Click **Submit**



12) Since we have added a diagnosis, the new Diagnosis will now appear in the Diagnosis Sub-grid



13) Fill out the **Financial Details** section

- Source of Income/Support: **Wages/Salary**
- Total Number of Dependents: **1**
- Expected/Actual Source of Payment: **Medicaid/OHP**
- Estimated Gross Household Monthly Income: **2000**
- Number of Child Dependents: **0**
- Primary Health Insurance: **Medicaid/OHP**



14) Fill out the Service Element Subgrid

- Service Element/Program: **MHS 16 – Peer Delivered Services (PDS)**
- Start Date: **select a random date in the past, must be on or after admission date**

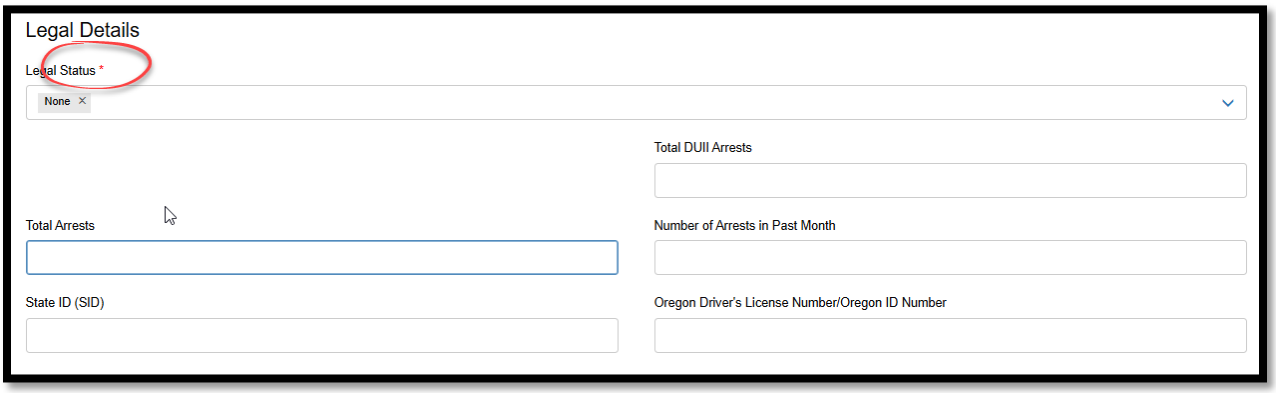
15) Click **Submit**



16) Fill out fields in the Legal Details section

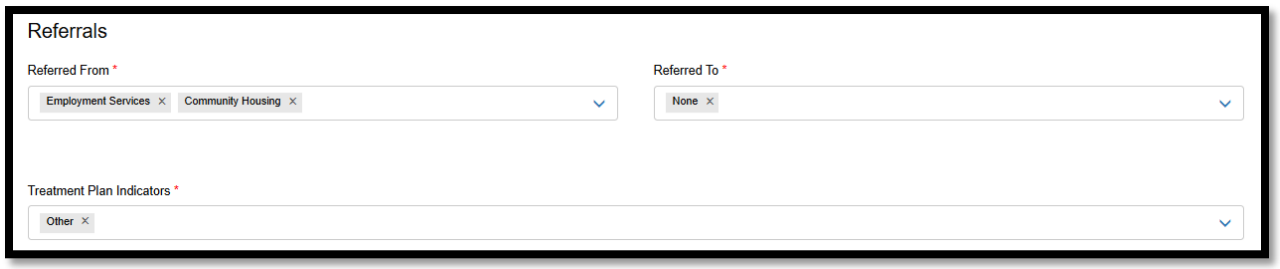
Most fields in this section are *conditional*, which means they may be required depending on the value selected for Legal Status. Legal Status is required, as noted by the red *

- Legal Status*: **None**
- Total DUII Arrests: **Can be left blank**
- Total Arrests: **Can be left blank**
- Number of Arrests in Past Month: **Can be left blank**
- State ID (SID): **Can be left blank**
- Oregon Driver's License Number/Oregon ID Number: **Can be left blank**

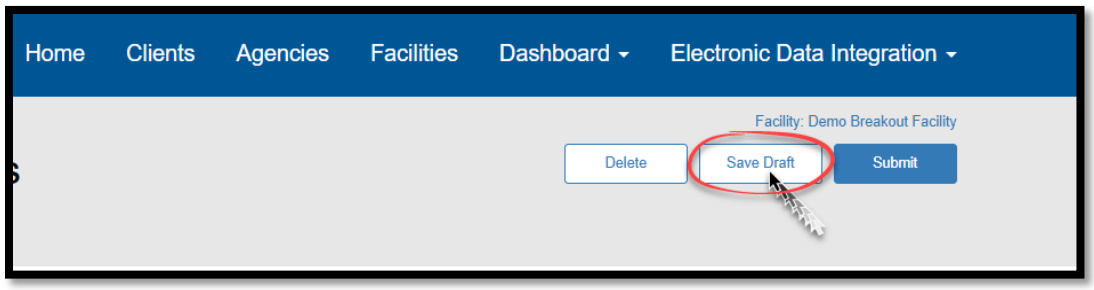


17) Fill out Referrals Section

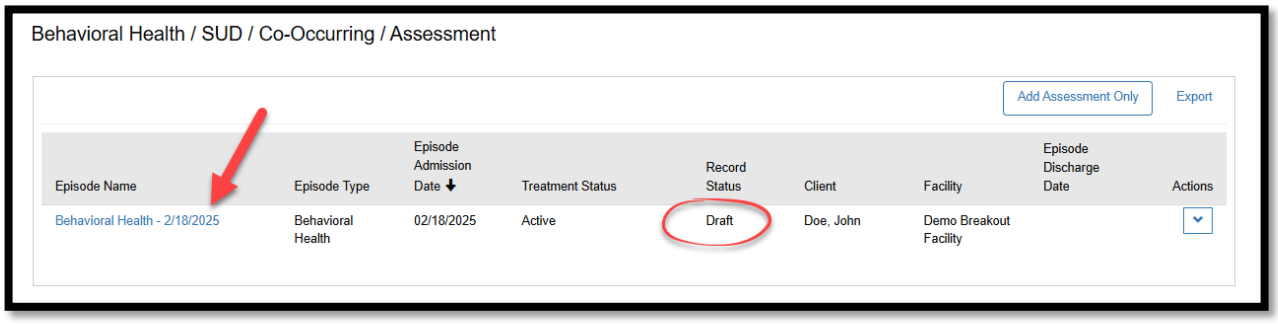
- Referred From: **Employment Services, Community Housing**
- Referred To: **None**
- Treatment Plan Indicators: **Other**



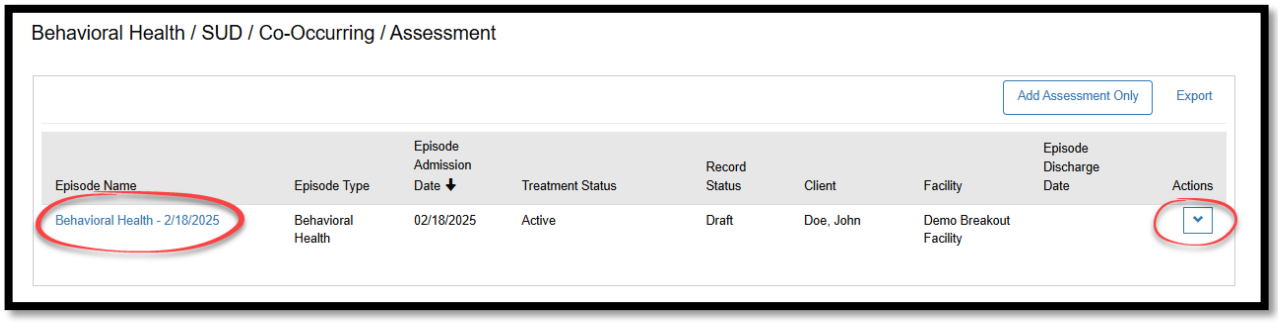
18) Scroll back to the top of the page and click **Save Draft**



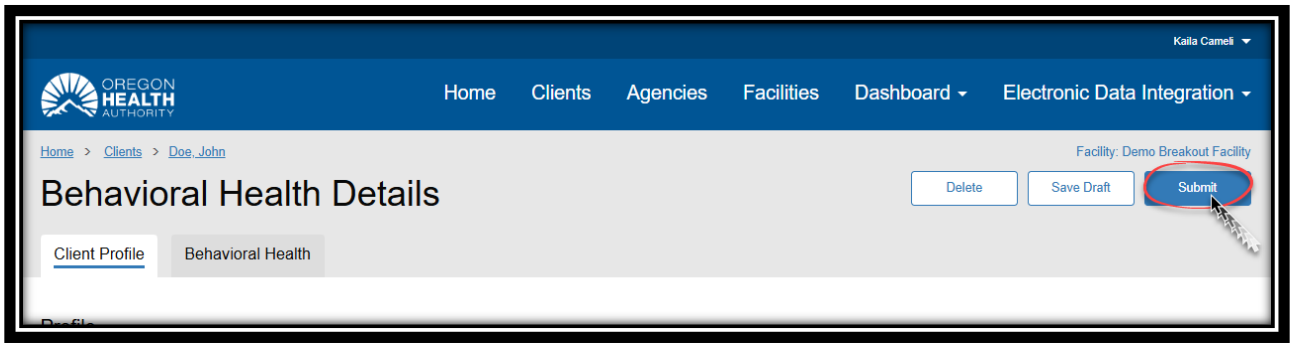
19) We should now see the Draft Episode in the sub grid



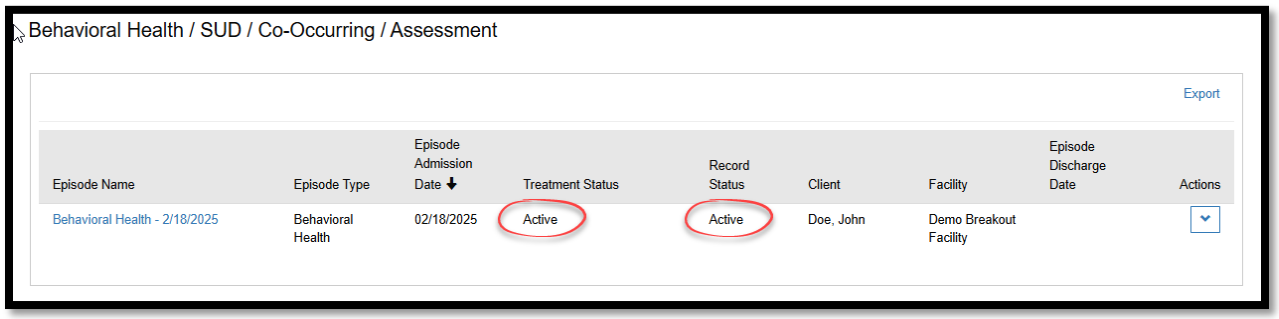
20) Click back into the Episode of Care you created by clicking the **blue hyperlink**, or **the arrow** on the right under the **Action column**



21) Click **Submit**



22) You will now see your submitted episode in the sub grid, you should see **Active** in the Treatment Status column and **Active** in the Record Status Column.



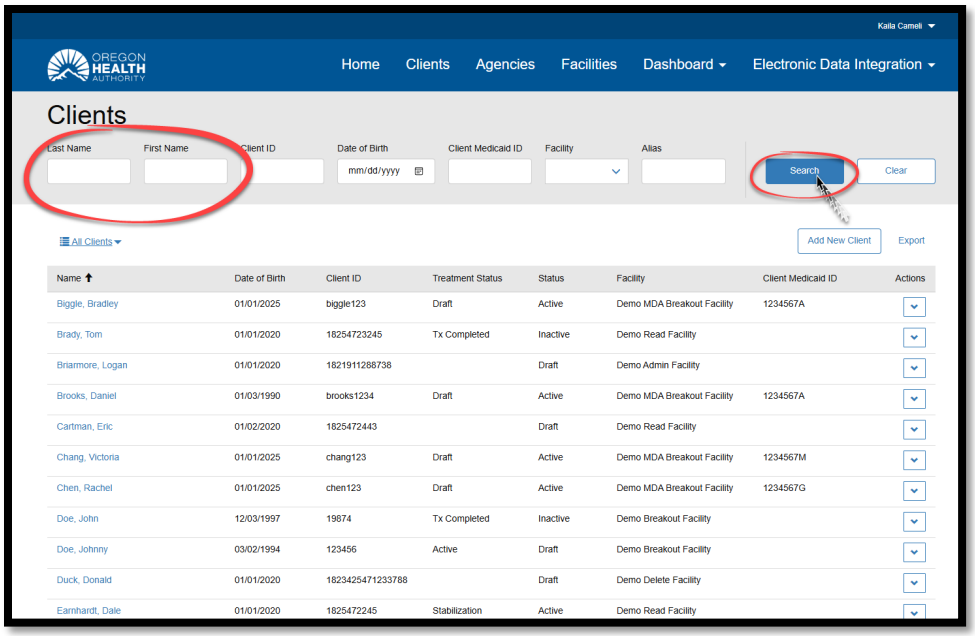
23) You have successfully submitted an Episode of Care in ROADS!



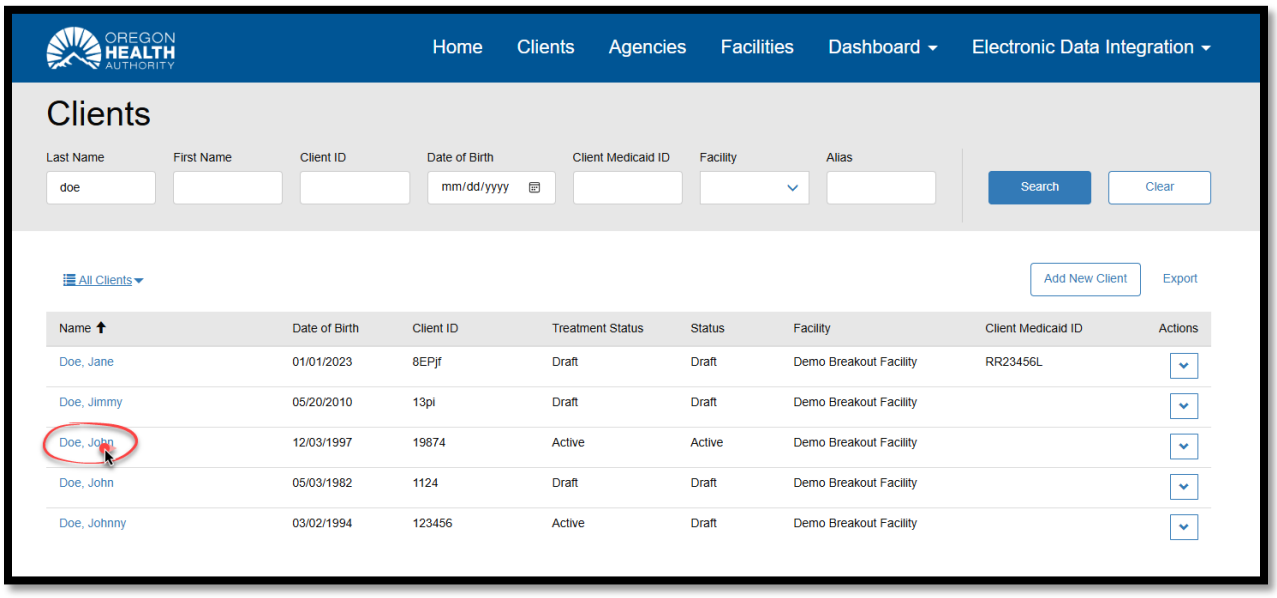
UPDATE AN EPISODE OF CARE

Imagine 90 days have gone by! It is not time for your client's first status update.

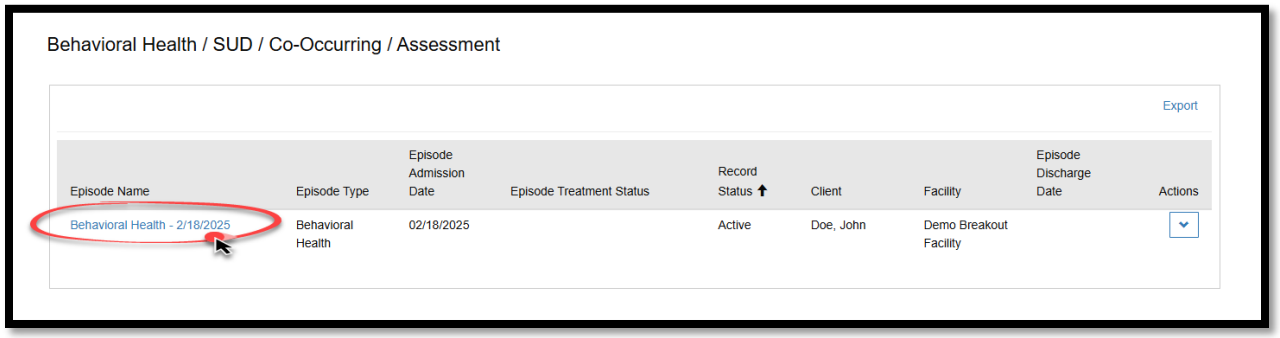
1. Search for your client



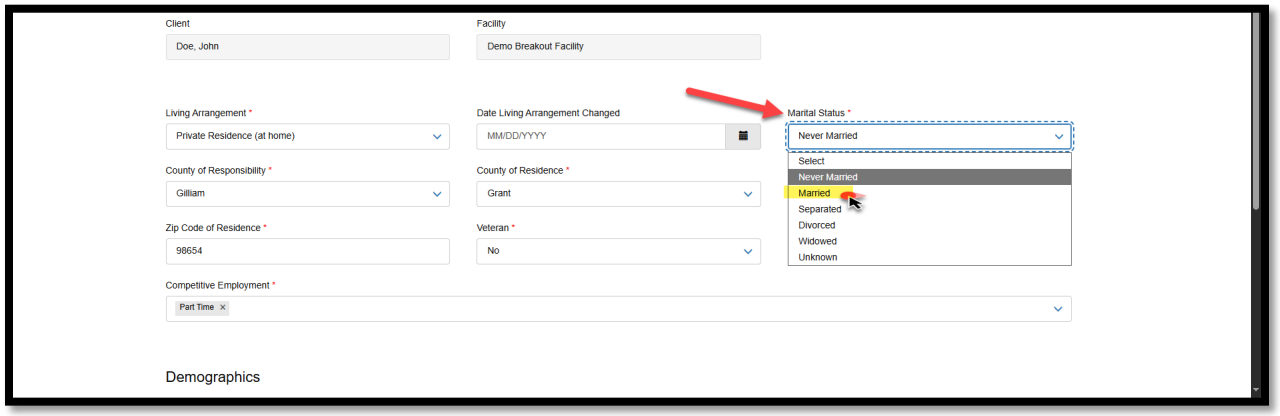
2. Click on your client's name to access their Client Summary page



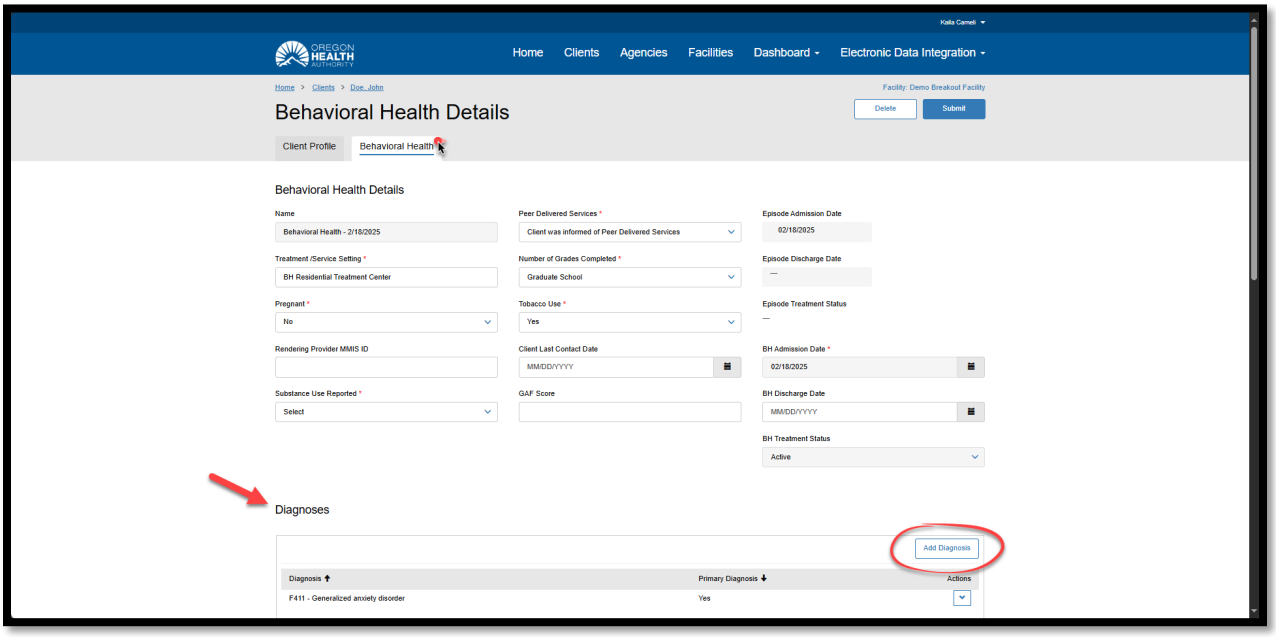
3. Scroll down to click the blue hyperlink for their Active Episode of Care in the "Behavioral Health / SUD / Co-Occuring / Assessment Subgrid



4. Update the Marital Status field to Married (if yours already says Married, pick a different value)



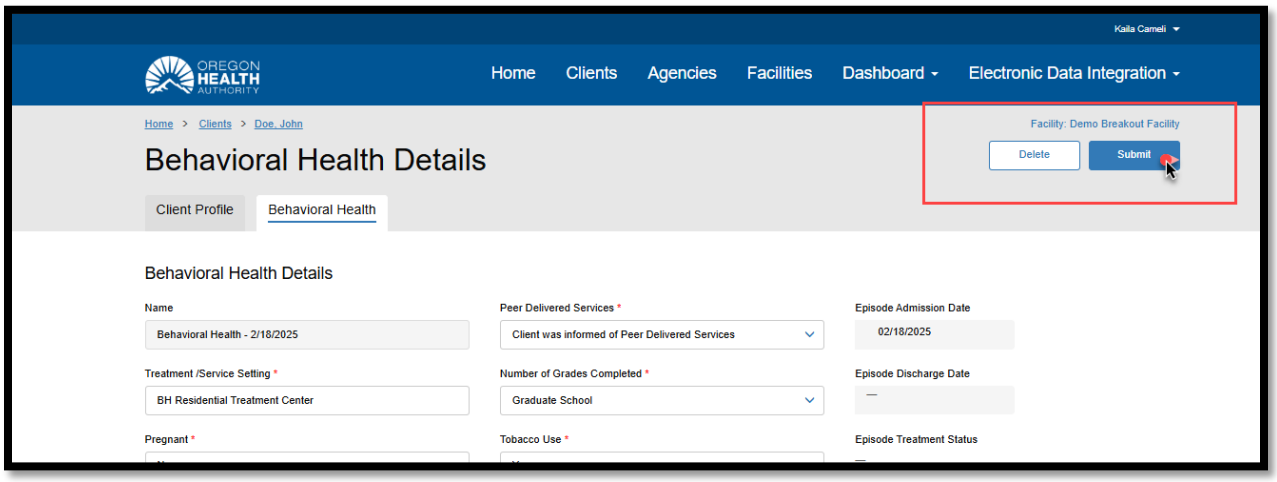
5. Navigate to the Behavioral Health tab and the Diagnosis Subgrid



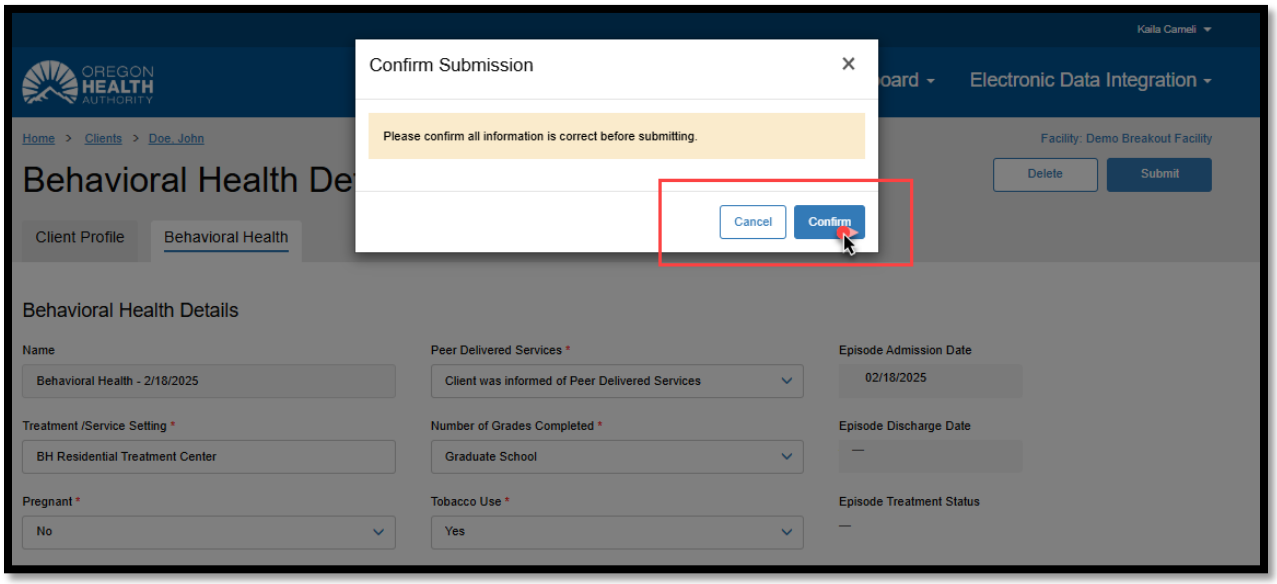
6. Add “F32A - Depression, unspecified” as a diagnosis, it is **not** the primary Diagnosis.



7. Now that all updates have been reflected in the portal, click Submit



8. Once you click Submit, you will be prompted to Confirm. Click Confirm

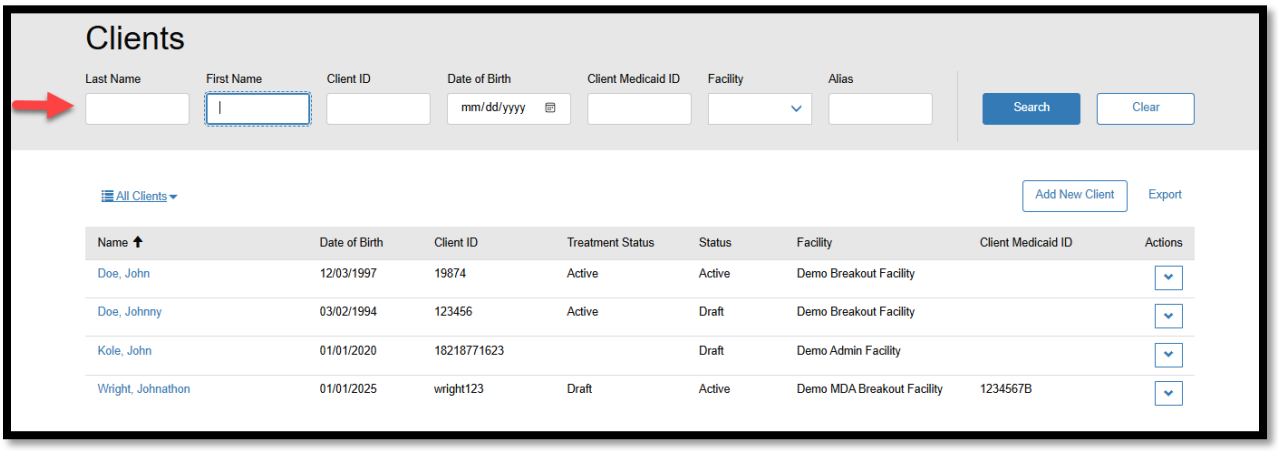


CONGRATULATIONS! YOU UPDATED AN EPISODE OF CARE IN ROADS!

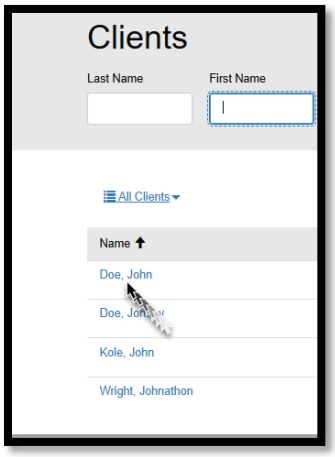


CREATE A NON-MEDICAID SERVICE

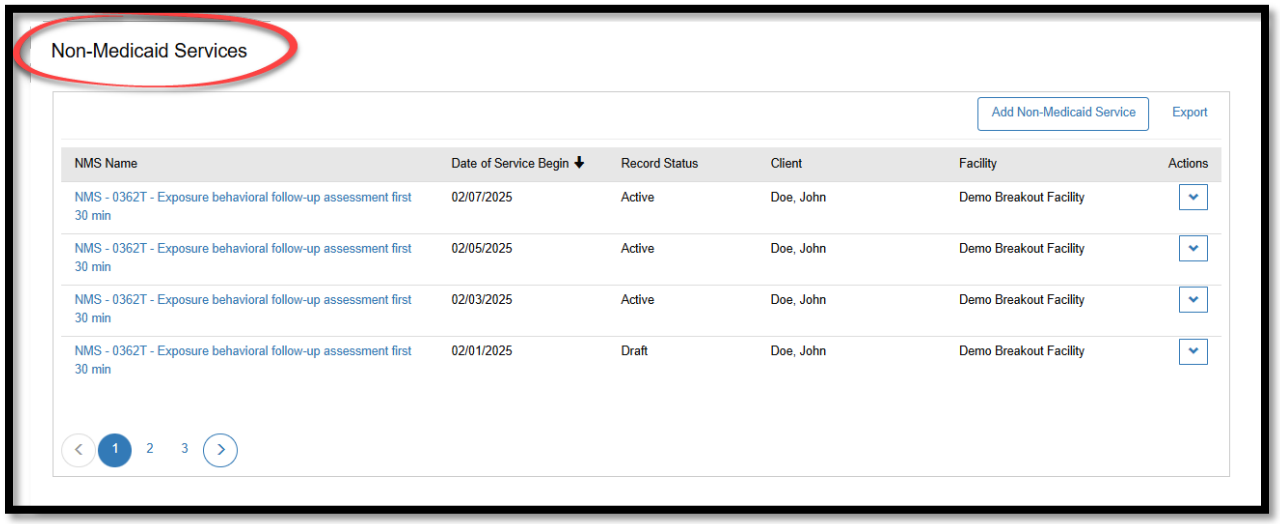
1) First, find your client by searching for them in the Client section



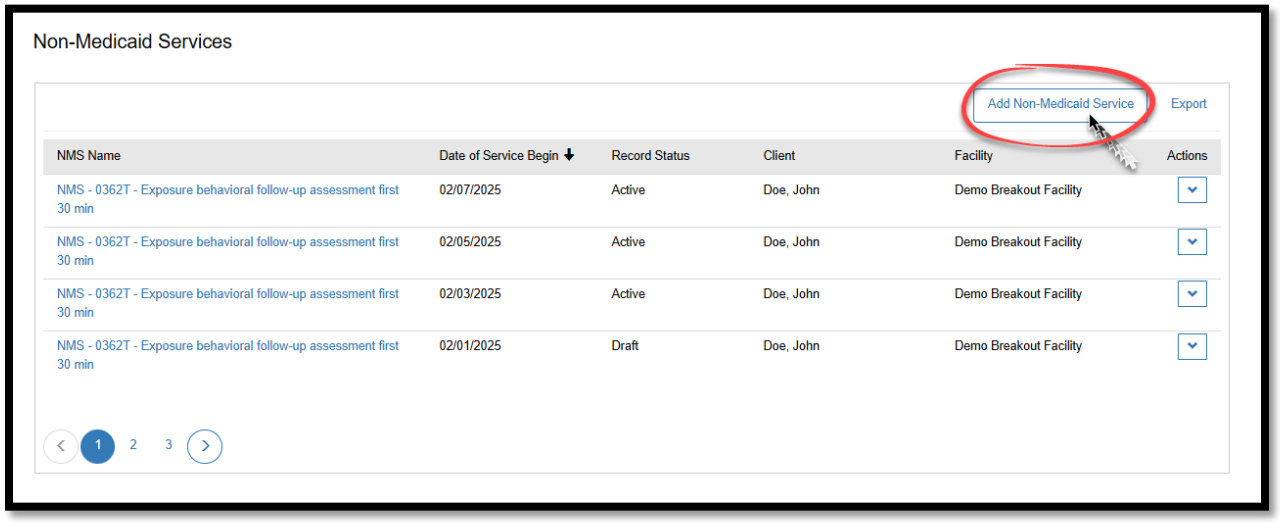
2) Click on your client by using the blue hyperlink



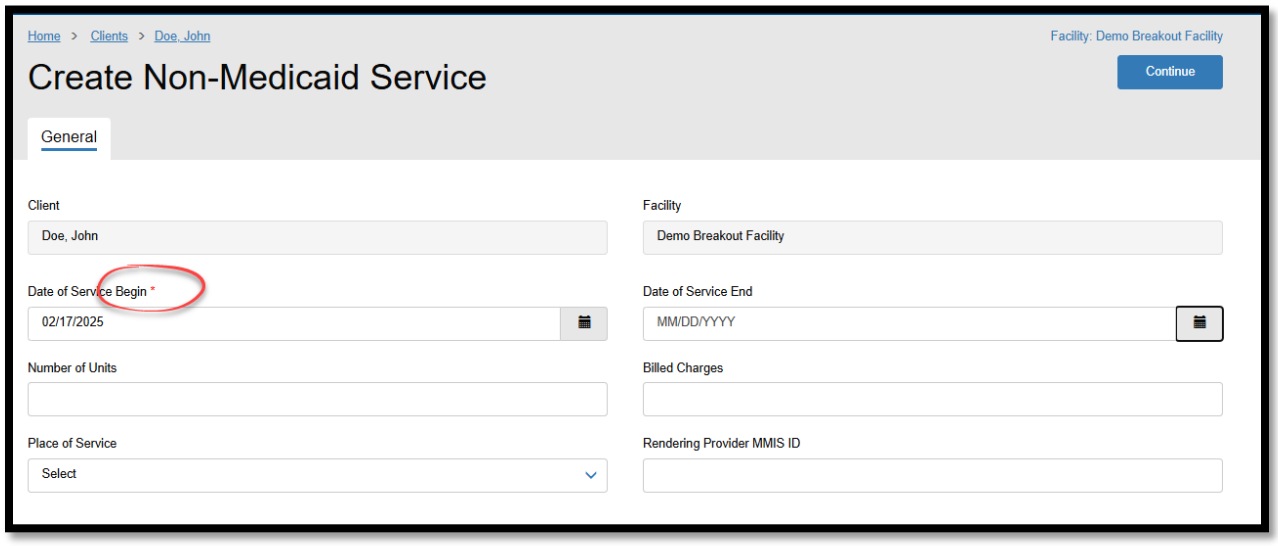
3) Once in the Client Details section, scroll down until you see the **Non-Medicaid Services** sub-grid



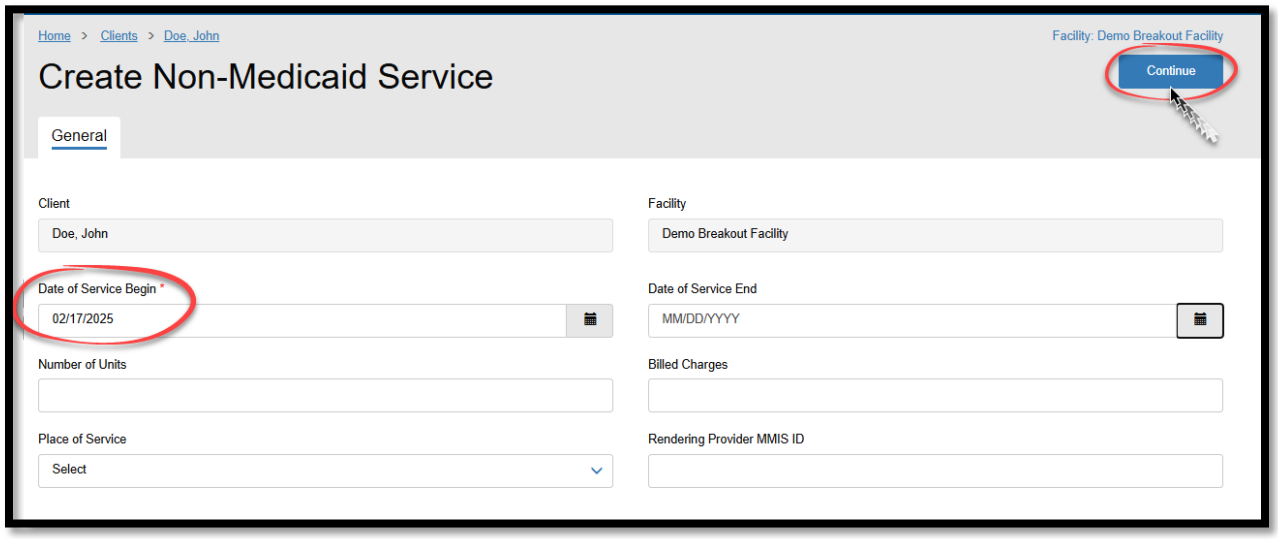
4) Click on the **Add Non-Medicaid Service** button in the right hand corner



5) Notice that the only field with an asterisk (meaning required) is the Date of Service Began field

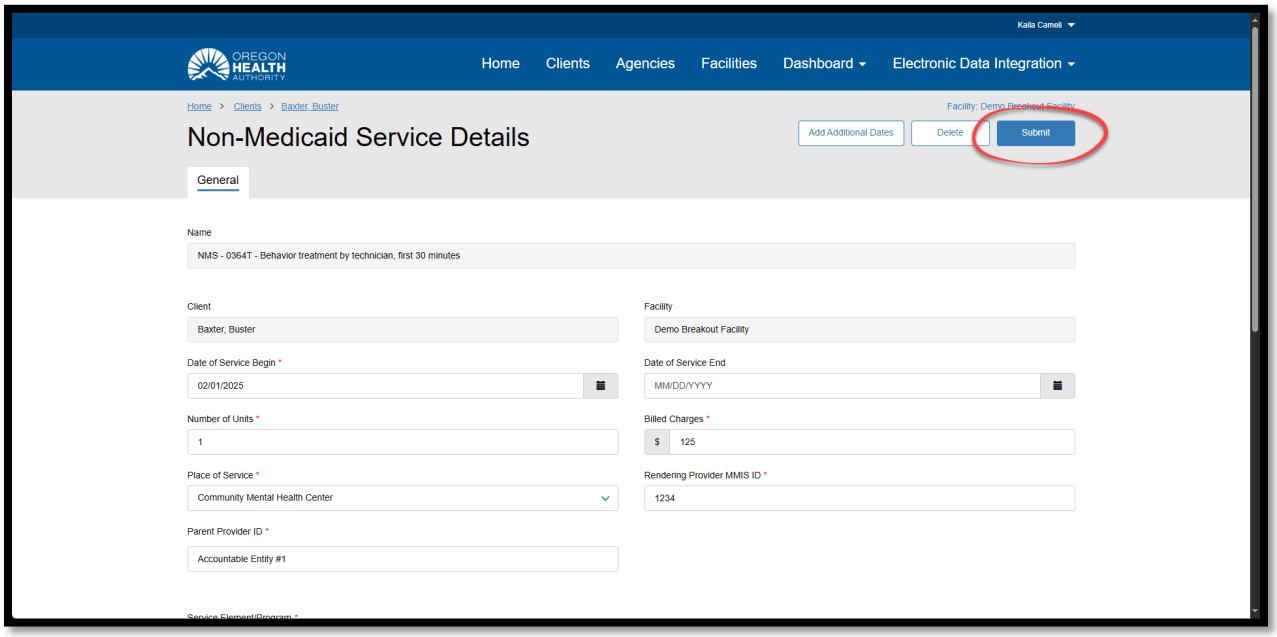


6) Use **August 1, 2025** as the Date of Service Begin and click **Continue**

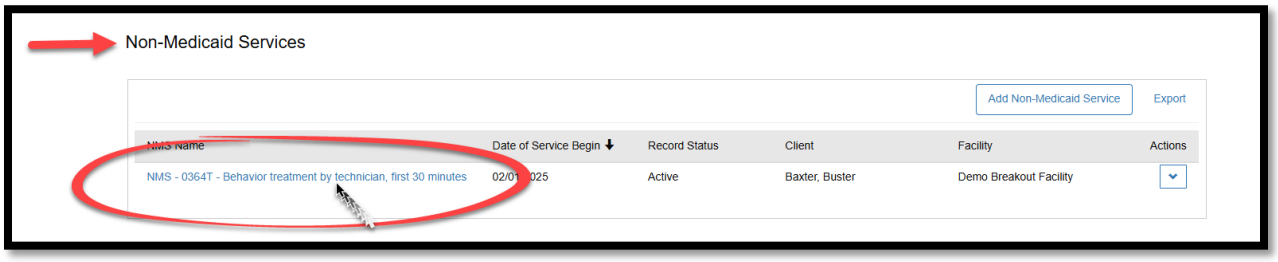


7) Now you will see the remaining fields appear as required. This is a theme in dynamics. Fill out the remaining required fields
    - Date Service End: **Leave blank**
    - Number of Units: **1**
    - Billed Charges: **125**
    - Place of Service: **Community Mental Health Center**
    - Rendering Provider MMIS ID: Leave blank*
    - Parent Provider ID: **Accountable Entity #1**
    - Service Element/Program: **N/A – None or unknown**
    - Procedure Code: **0364T – Behavior treatment by technician, first 30 minutes**
    - Procedure Modifier: Leave Blank*
    - Diagnosis: **F411 – Generalized anxiety disorder**

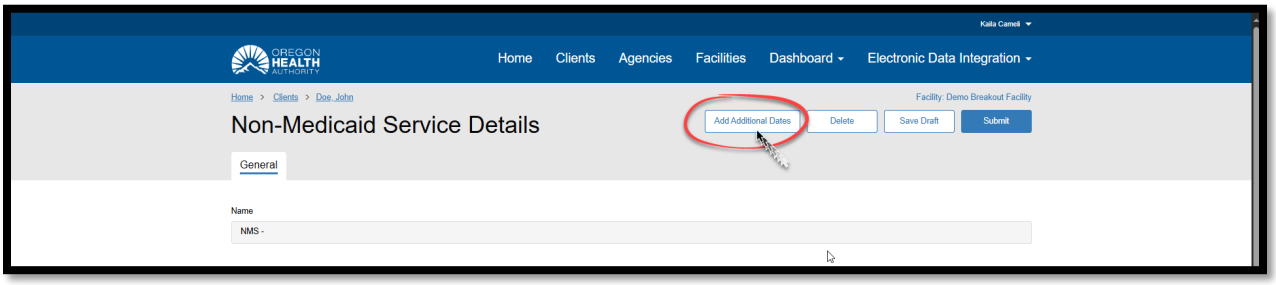
8) Scroll back up to the top and Click **Submit**.



9) Once it has been added successfully, click back into the Non-Medicaid Service you just created by **clicking the blue hyper-link**



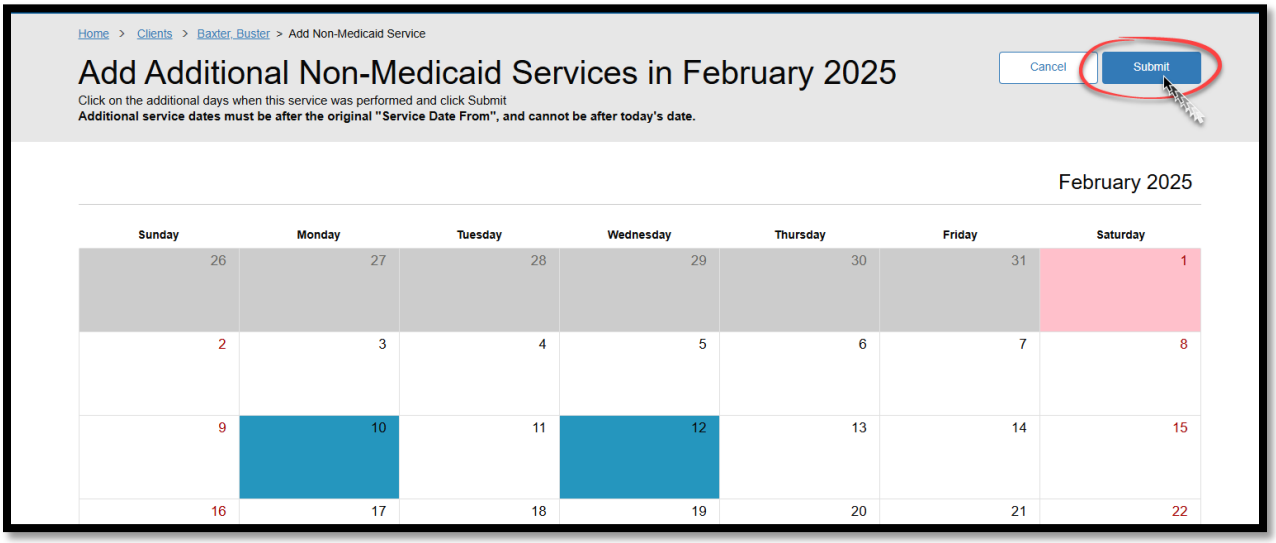
10) At the top of the page, click **Add Additional Dates**
    a. Adding Additional Dates allows a user to clone a Non-Medicaid Service and apply it to another date in the calendar month, as long as the date is after the Service Date From and not in the future.



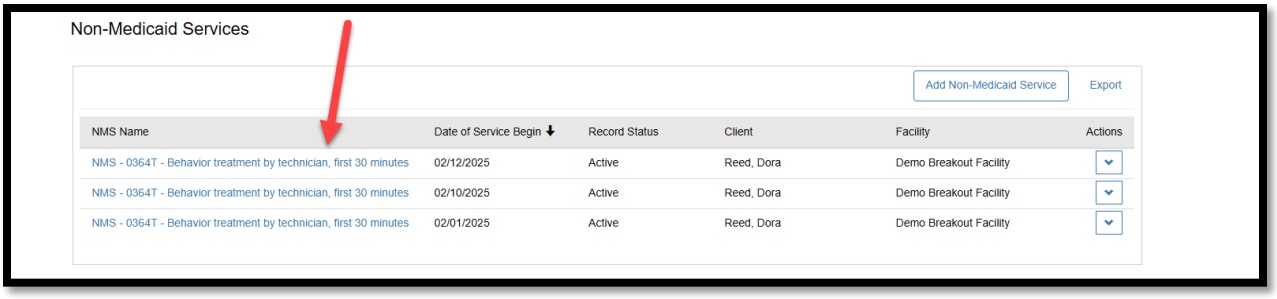
11) Select the following dates, **2/10/2025 and 2/12/2025**. Available dates will be white in color



12) Once selected, the dates will turn blue. After you've selected all your dates, click **Submit**



13) Now you will see your newly created Non-Medicaid Services



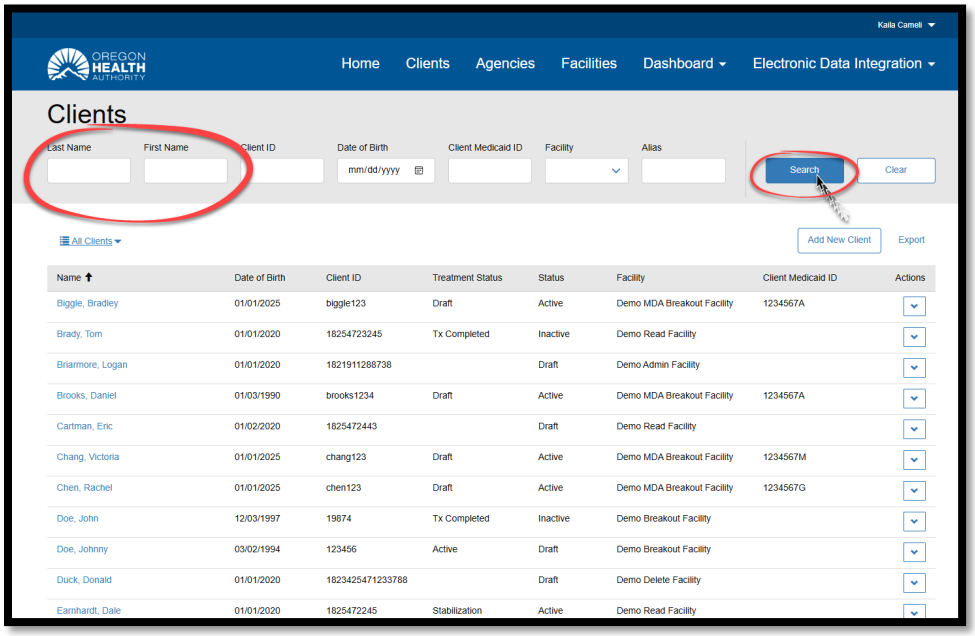
CONGRATULATIONS! YOU SUBMITTED A NON-MEDICAID SERVICE IN ROADS!



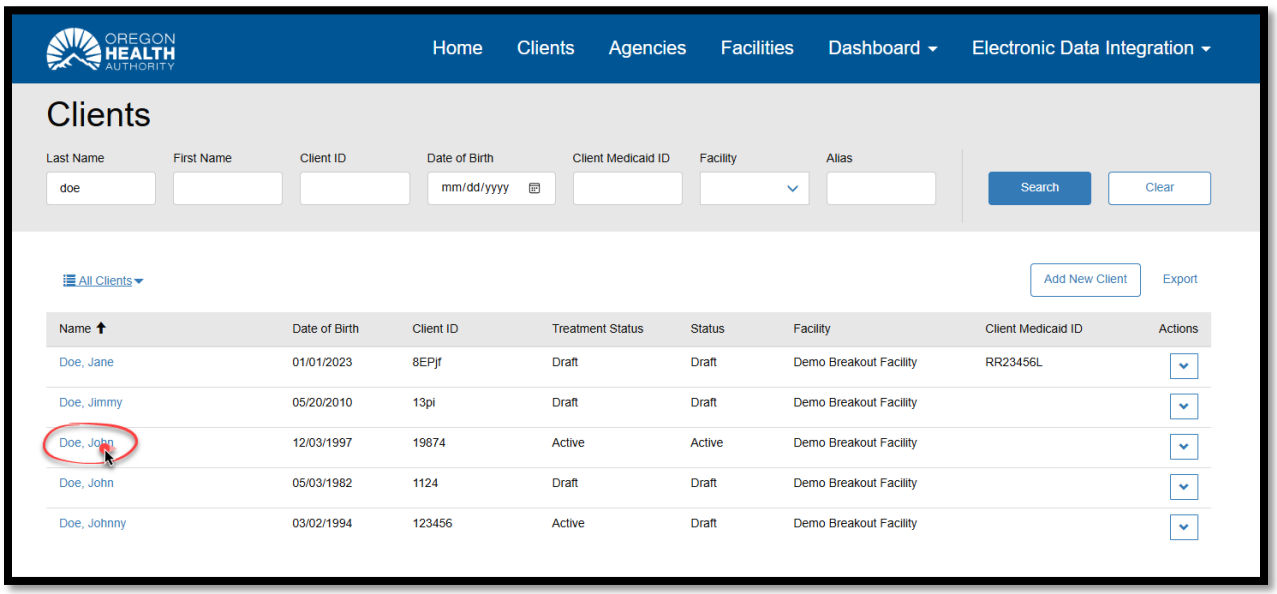
Discharge Episode of Care

Time has gone by! This client needs to be discharged from treatment.

1. Search for your client



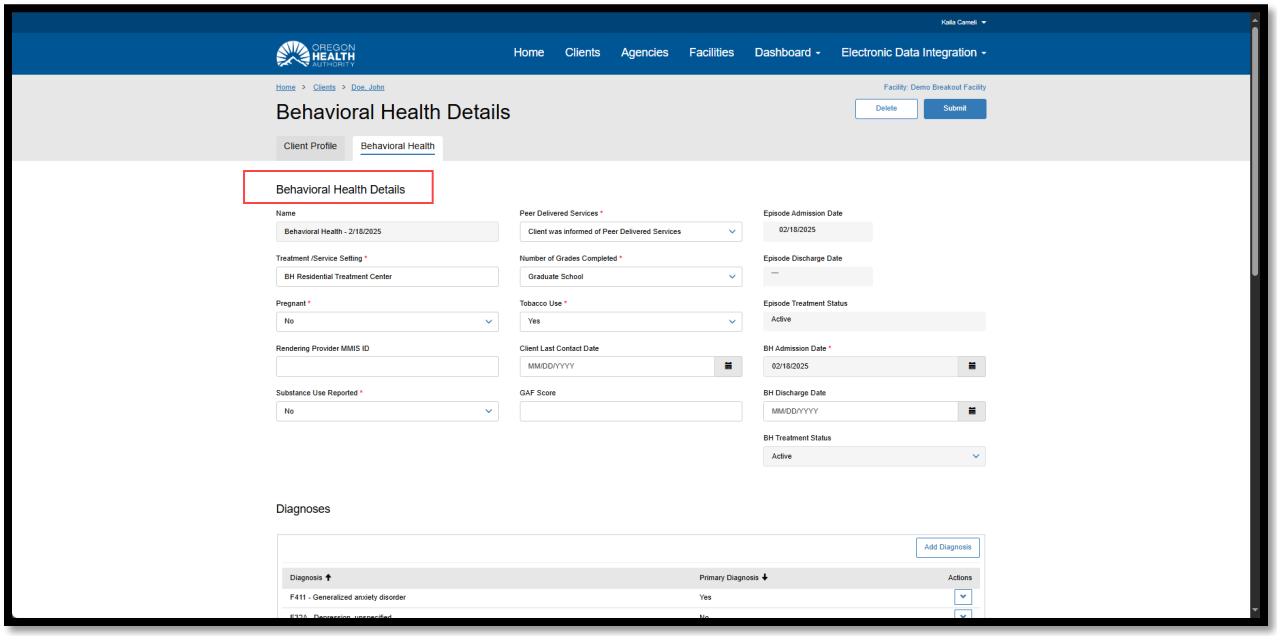
2. Click on your client's name to access their Client Summary page



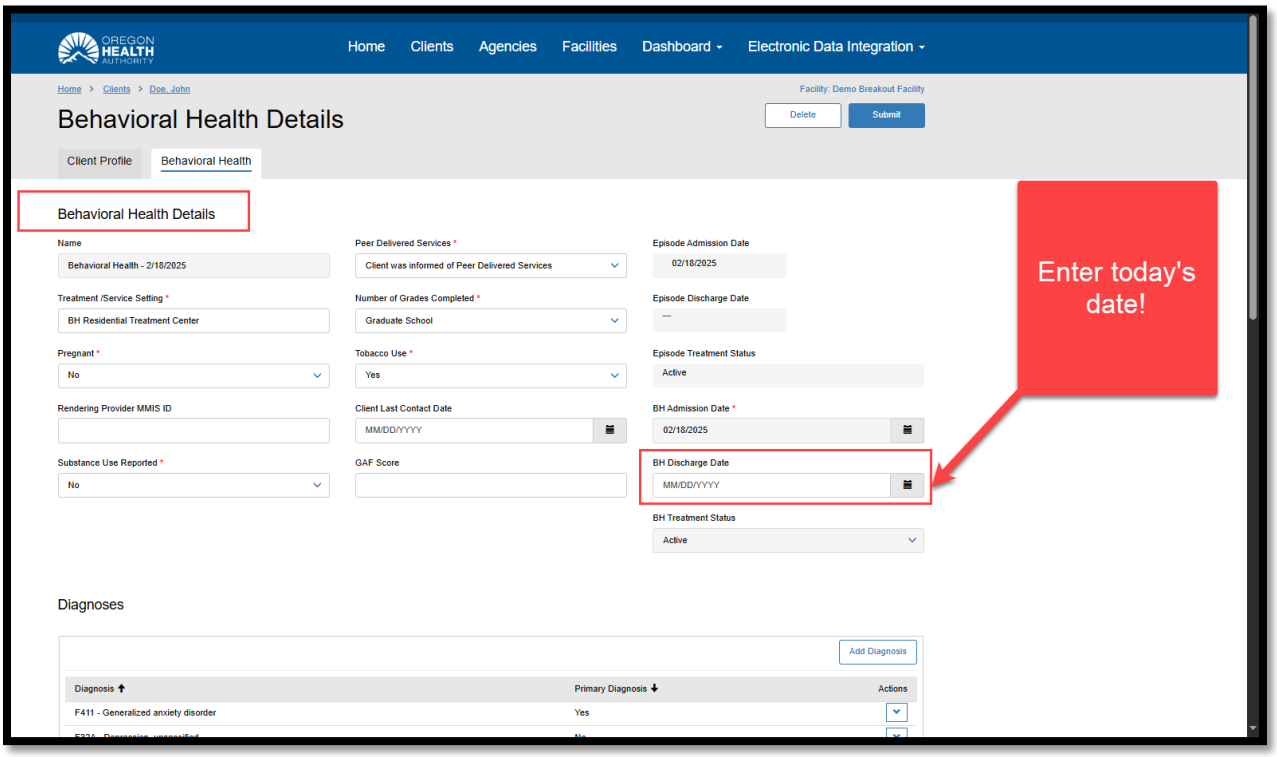
3. Scroll down to click the blue hyperlink for their Active Episode of Care in the "Behavioral Health / SUD / Co-Occuring / Assessment Sub-grid



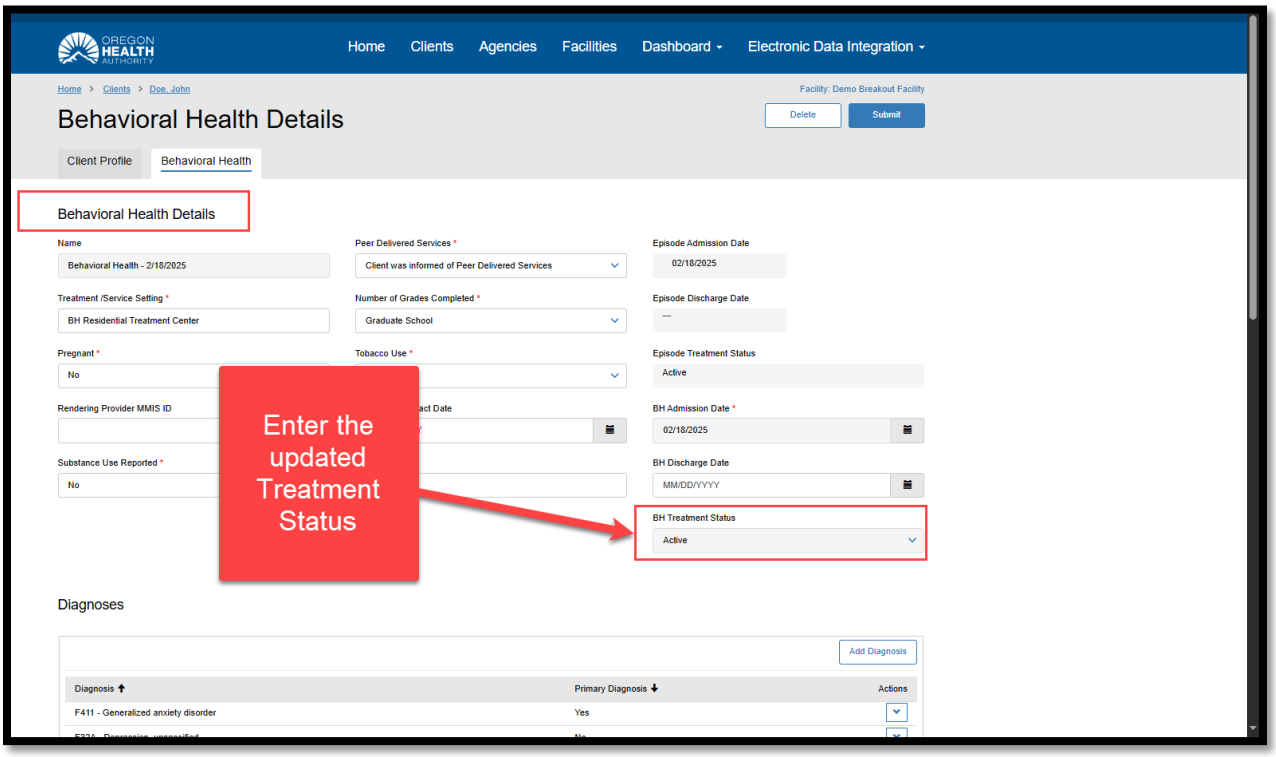
4. Navigate to the Behavioral Health tab and focus your attention to the Behavioral Health Details section at the top of the page



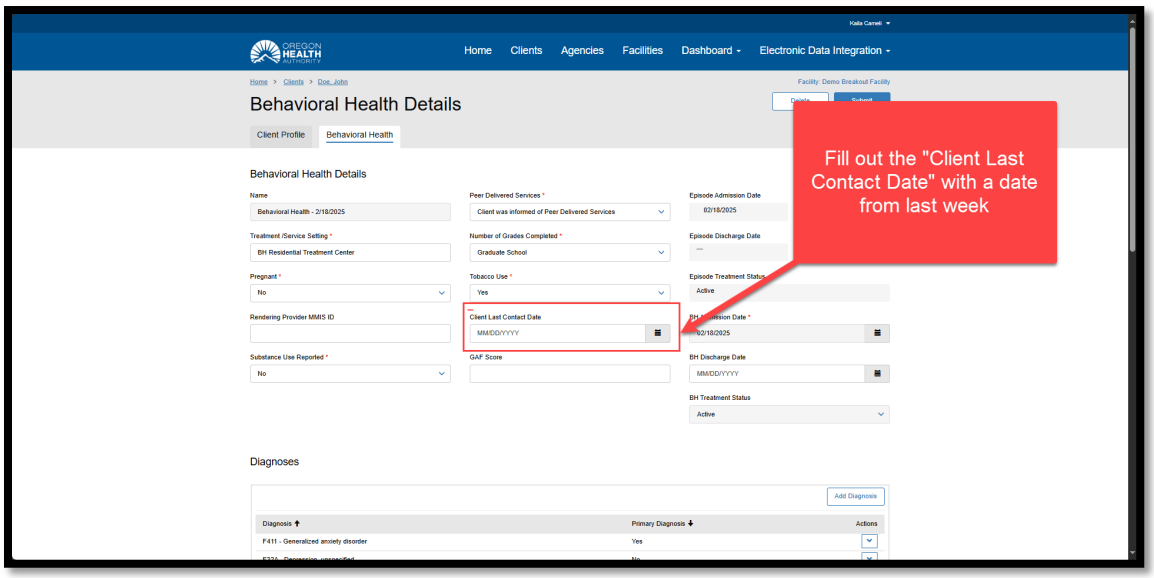
5. The first field we will complete to discharge a client is the BH Discharge Date. **Please enter TODAY'S DATE in this field.**



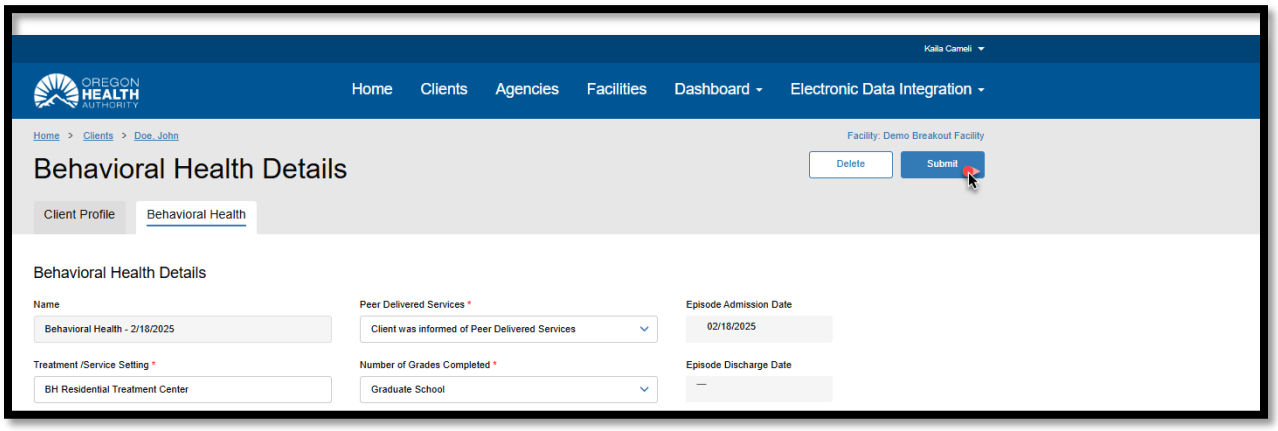
6. Once the date is entered, you are now able to update the **BH Treatment Status** field (directly underneath)



7. Fill in the “Client Last Contact Date” field



8. Click Submit



9. Resolve any Business Rule Errors (if you get them!)

CONGRATULATIONS! YOU DISCHARGED AN EPISODE OF CARE IN ROADS!

