



**OREGON HEALTH AUTHORITY  
ADDICTIONS AND MENTAL HEALTH**

**Measures and Outcomes Tracking System  
(MOTS)**

**Agency and Facility  
System Administrator User Guide**

**July 24, 2015**

*Version 5.1*

If you need this document in an alternate format, please call 503-945-5763 (Voice)  
or 800-375-2863 (TTY)  
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## Version Control

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## 1 Introduction

The Measures and Outcomes Tracking System (MOTS) is an internet based web portal designed to facilitate data collection of addictions and mental health client treatment data from all publicly funded behavioral health providers across Oregon. The MOTS will collect status (demographic) and non-Medicaid service data. Status data provides information during the treatment cycle (such as at admission and then updates at least every 90 days), and non-Medicaid service data provides information on services/happenings within the treatment episode. The collection of this data will allow Addictions and Mental Health (AMH) to focus on outcomes.

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.

This user guide is intended to be a reference guide for accomplishing the work associated with agency/facility system administrator functionality and provide the user with clear instruction for doing so. This user guide does not refer to the web based Client Entry tool. A user guide has been developed specifically for that tool and can be found on the MOTS web page located at <http://www.oregon.gov/oha/amh/mots/Pages/index.aspx>.

In order for MOTS to function there is a core set of system administrative functionality that has been developed. These system administrator functions will be used by provider staff at agencies, facilities and AMH.

## 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 system and its components. MOTS System Administrators should review this user guide prior to using the system. If there are questions, please contact [mots.support@state.or.us](mailto:mots.support@state.or.us).

## 3 MOTS Conventions

**Browser:** Internet Explorer (10 or higher) and Mozilla Firefox are supported when working within MOTS.

**Tab Order:** Always left to right, top to bottom.

**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.

**Mandatory fields:** All fields within MOTS will be mandatory unless they are displayed as Optional or Situational by the field name.

**Special Characters:** MOTS can accept only these special characters: hyphen (-) and apostrophe ('). Exception: Email addresses will require a @ and a period (.).

**Clickable Rows or Underlined Links:** Information within data tables are typically links to more information. Data Tables that include links 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 Button:** MOTS will only allow the user to save information if all the mandatory fields are completed.

**Save as Draft Button:** Save as Draft button works to save information in a non-complete format. User may save information in draft if they do not have all necessary information, and the record will be flagged as draft. Data submission will not be successful until the record is complete and successfully saved. Not all screens will have a Save as Draft button.

**Back Button:** Back button works to take the user back a page. Typically this button does not save work and will not provide the user a message about work not being saved. If you want to save, be sure to click Save or Save as Draft prior to clicking on the Back button.

**IMPORTANT NOTE:** Always use the Back button on the screen if there is one. DO NOT use the back arrow at the top of the web page. Go back to the admin tab and choose where to go next. If you use the back arrow at the top of the web page (the browser back button), it may not take the user back to where they want to go and the user will likely lose the data entered.

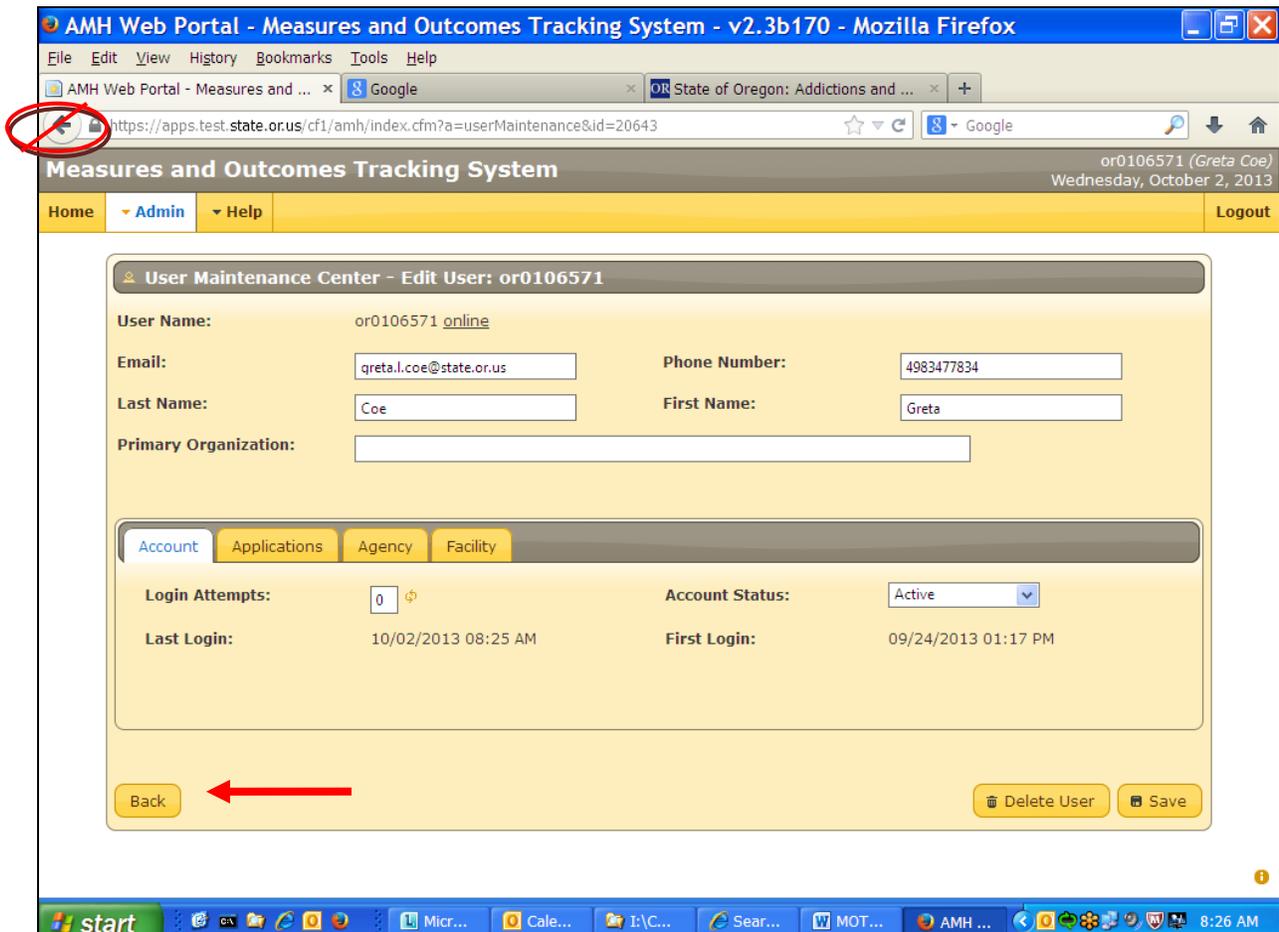


Figure 1 – Sample Page with “Back Button”

## 4 Provider Levels

In order to differentiate types of providers in MOTS, AMH identifies provider types in three separate categories:

**Parent Providers:** MOTS considers Community Mental Health Providers (CMHPs), direct contractors of AMH, and the Addictions and Mental Health (AMH) office to be Parent Providers. This is the highest provider level, responsible for oversight and funding to other provider types. Parent Providers are responsible for the dollars they receive from AMH to ensure that services delivered are effective.

**Agencies:** This provider type ensures support and structure for the next level of provider, the facility.

**Facilities:** A Facility is a place where direct services to a client occur.

The table below shows the hierarchy for all provider types and roles that will be included in MOTS.

Provider Type	Can act as...		
	CMHP/Parent Provider	Agency/Billing Provider	Facility/Rendering Provider
Parent Provider (CMHP/AMH)	Y	Y	Y
Agency	N	Y	Y
Facility	N	N	Y

Figure 2 – Hierarchy Structure within MOTS

As illustrated in the table above, a Parent Provider could play all three roles: Parent Provider, agency and facility. An Agency can be an agency and a facility; however a Facility can act only as a facility.

## 5 MOTS System Admin Functions, Attributes, and Timelines

### 5.1 System Admin Functions

It is important for an agency/facility to select the correct person to designate as their MOTS system administrator. Below is a definition of a system administrator and the functional responsibilities and attributes the person may need. It is recommended that each agency/facility eventually select more than one system administrator due to turnover, workload and availability.

**System Administrator:** An Agency or facility system administrator is defined as a person who directs or performs all activities related to maintaining a successful MOTS database environment. Responsibilities include implementing and upkeep of the MOTS database system, integrity of the data, establishing policies and procedures pertaining to the management, security, maintenance, and training employees in MOTS database use.

The system administrator functions in MOTS that are available to a given user depend on the user's role. There are three levels of users for MOTS administrator: AMH administrators, agency administrators, and facility administrators.

1. AMH system administrators are AMH staff only and this role will not be covered within this user guide
2. Agency system administrators will be responsible and authorized to use the MOTS administration system for the following tasks\*\*:
  - Set up and manage agency profiles
  - Set up facility profiles
  - Set up and manage agency users
  - Set up and manage system administrators for facilities associated with the agency
  - Request a change in data submission method for facilities associated with the agency
  - Request merge and un-merge process for agency's or facility's client records (this is future functionality and will be available in a future release of MOTS)
3. Facility system administrators will use MOTS administration system for the following tasks:
  - Manage facility profiles
  - Set up and manage facility users
  - Request a change in data submission method for the facility
  - Request merge and un-merge process for facility's client records (this is future functionality and will be available in a future release of MOTS)

\*\*An Agency System Administrator can also act as the Facility System Administrator when appropriate.

## **5.2 System Admin Attributes**

List of attributes of a system administrator:

- Responsive
- Good listener, good communicator
- Has time to do the job
- Committed
- Well respected by co-workers
- Adequate computer skills
- Attention to detail
- Understanding of the organization structure
- Team player
- Good trainer/instructor
- Patient with others

## **5.3 System Administrator Timeline**

An initial Agency System Administrator will need to be designated by the Agency to complete the registration process. Once registered, an agency can add an alternate or additional Agency System Administrator(s) as they deem appropriate. If an agency also has facilities that function as service delivery locations, Facility System Administrators will need to be selected and set up for each of those facilities. Selection and training of these Facility System Administrators or Alternate Agency System Administrators should be completed before starting the registration process.

Once the Agency and/or Facility System Administrators are selected, it will also be important for them to review this user guide, and attend a live webinar and/or view the online video regarding use of MOTS Administration before they attempt to access the MOTS System.

## 6 Registration By Agency System Administrator

1. Open Internet browser (Internet Explorer or Firefox).
2. Go to the MOTS Web page located at:  
<http://www.oregon.gov/oha/amh/mots/Pages/index.aspx>.
3. Find the MOTS Registration information on the page and click on the link to register.
4. Complete all the required fields.
5. Click the Submit button.

The screenshot shows the 'MOTS Registration Request Form' on the Oregon.gov website. The page header includes the Oregon.gov logo, the Oregon State Fair logo (Aug. 23 - Sept. 2, 2013), and the Oregon Health Authority logo. The main navigation bar is 'Addictions and Mental Health Services'. A left sidebar contains various links like 'About Us', 'Contact Us', 'Addictions Services', 'Prevention', 'Problem Gambling', 'Adult Mental Health Services', 'Blue Mountain Recovery Center', 'Oregon State Hospital', 'AMH Transmittals', 'Children's Mental Health', 'Medicaid Services - AMH', 'Rules, Statutes and OARS', 'Public Meetings', 'Reports and Data', 'Resources', 'State Epidemiological Outcomes Workgroup (SEOW)', 'Tools for Providers', 'Topic Search', 'AMH Home', and 'Oregon Health Authority'. The form itself is titled 'MOTS Registration Request Form' and contains the following fields:

- OR Medicaid Provider ID: [Text Input]
- OR Medicaid Provider ID: [Text Input] (Optional)
- Business Name: [Text Input]
- DBA: [Text Input] (Optional)
- Office Phone: [Text Input]
- Ext.: [Text Input] (Optional)
- Physical Address: [Text Input]
- City: [Text Input]
- State: [Dropdown Menu] (Oregon selected)
- County: [Dropdown Menu] (Select a County)
- Zip: [Text Input]

Below these fields are two sections:

- System Admin Information:**
  - First Name: [Text Input]
  - Last Name: [Text Input]
  - Email: [Text Input]
  - Confirm Email: [Text Input]
- Supervisor Information:**
  - First Name: [Text Input]
  - Last Name: [Text Input]
  - Email: [Text Input]

Figure 3 – MOTS Registration Request

Once submitted, an email from the [amh-applications.ois@state.or.us](mailto:amh-applications.ois@state.or.us) email box will be sent to the Agency System Admin and Supervisor listed on the registration form confirming registration submission,

providing an overview of information submitted, next steps, and describing how to obtain a user name/P number.

## 6.1 Oregon Medicaid Provider Number

MOTS requires an Oregon Medicaid Provider Number during the registration process. Each Agency reporting into MOTS will need to select/identify which Oregon Medicaid Provider Number they want to use for reporting into MOTS.

If an agency/facility does not have an Oregon Medicaid Provider Number issued by the Medical Assistance Program (MAP), they will not be able to register until one is obtained. Follow the instructions within the *Policy on OR Medicaid Provider Number and AMH Data Submission* located on the MOTS web page resources section at: <http://www.oregon.gov/oha/amh/mots/Pages/index.aspx> to determine the type of number (Billing or Non-Billing) you want to obtain and the process for obtaining.

NOTE: Each facility you enter into MOTS must have a unique Doing Business As (DBA ) name and Oregon Medicaid Provider Number.

## 7 Obtaining User Names/P Numbers

Every MOTS user, starting with the Agency System Administrator, will need a *P Number* issued to them before they can access MOTS. This field will be known as “user name” throughout the MOTS system. *P Numbers are only* issued by the DHS/OHA Service Desk.

**MOTS Support** will facilitate set-up and access for the Agency System Administrator. MOTS Support will:

1. Obtain a P number and temporary password from the DHS/OHA Service Desk for the Agency System Administrator listed on the registration form. The format of a P Number is P followed by numbers, such as P0105467.
2. Set up access rights to the Agency System Administrator under this user name/P number.
3. Send the Agency System Administrator a secure email from [mots.support@state.or.us](mailto:mots.support@state.or.us) with instructions on how to access the system with the new P number (user name) and temporary password, and how to set up other users in MOTS.

The **Agency System Administrator** is then authorized to facilitate set-up and access for other users of the MOTS system, using the following steps:

1. Follow instructions for completing the spreadsheet identifying who will be MOTS users for that agency and/or facilities.
2. Submit completed spreadsheet to [mots.support@state.or.us](mailto:mots.support@state.or.us)

Once the DHS/OHA Service Desk has processed the request and issued P numbers and temporary passwords, MOTS Support will electronically return the spreadsheet to the Agency System Administrator via email. The spread sheet will include P numbers (user name) and temporary passwords for each staff on the list.

3. Set up access for each Agency user with the MOTS-authorized P number (user name) and password. This process is explained further in the [9.4 User Maintenance](#) section of this document.

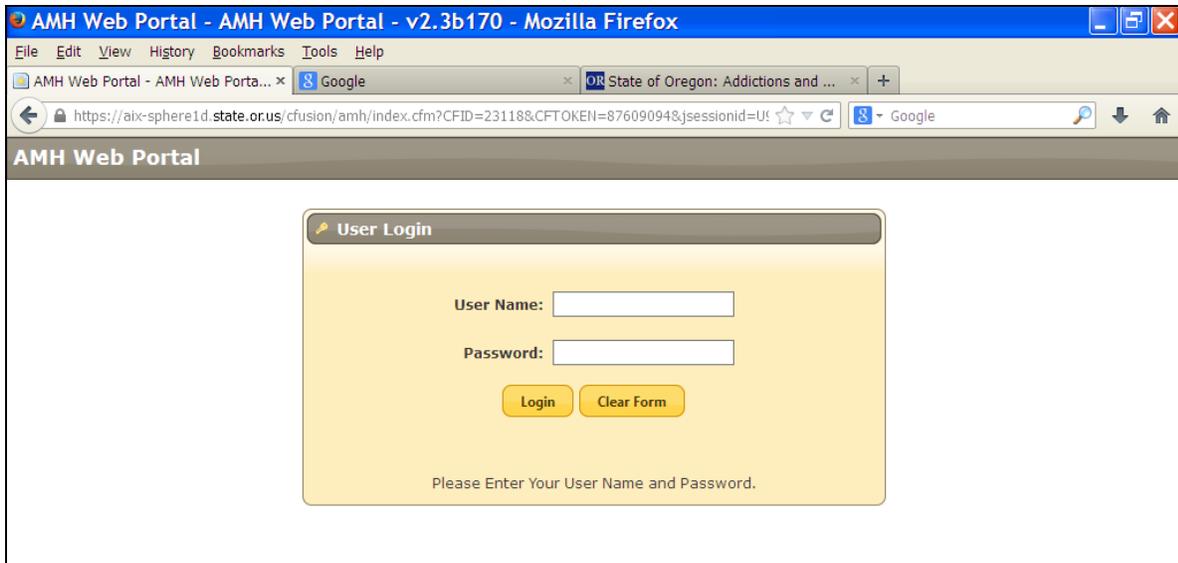
Here is a Review of the Process:

1. Agency System Admin completes MOTS registration.
2. MOTS Support obtains Agency System Admin P number/user name and password from DHS/OHA Service Desk.
3. MOTS Support staff set up access rights within system for Agency System Admin.
4. MOTS Support/Program staff sends P number/user name and password to Agency System Admin via email.
5. Agency System Admin to complete [MOTS User Name Acquisition Spreadsheet](#) for other users within the agency who need access to MOTS.
6. Agency System Admin to send MOTS User Name Acquisition Spreadsheet to [mots.support@state.or.us](mailto:mots.support@state.or.us).
7. MOTS Support obtains P numbers/user names and passwords from DHS/OHA Service Desk.
8. MOTS Support returns MOTS User Name Acquisition Spreadsheet with user name/P number(s) and password(s) to Agency System Admin.
9. Agency System Admin sets up access rights within system for users.

## 8 Accessing MOTS

Once the user has a user name/P number, they are ready to access MOTS. MOTS is a web-based system and can be accessed from any computer that can access the World Wide Web. These are the steps each user within the organization will follow to set up a new password and access the MOTS System.

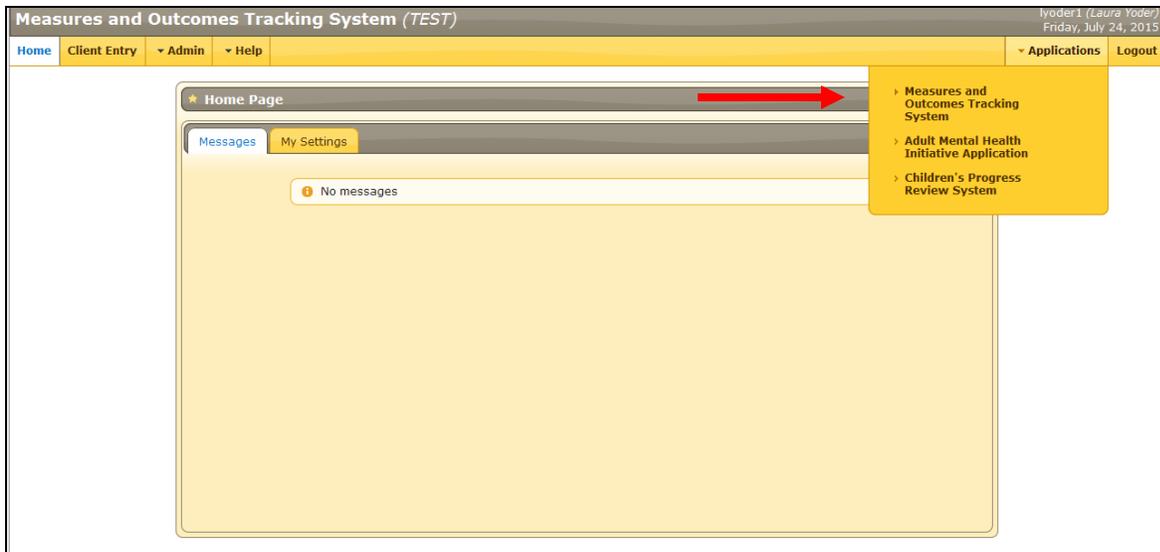
1. Open Internet browser.
2. Enter the DHS Citrix portal address in the address line at the top of the browser screen: <https://dhs.oregon.gov>.
3. Enter the P number and temporary password.
4. The system will prompt the user to change their password and confirm.
5. Once the user has created their unique 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: [https://aix-xweb1p.state.or.us/amh\\_xweb/amh/](https://aix-xweb1p.state.or.us/amh_xweb/amh/)
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 [9.4.4 Reset Password](#) for directions.



**Figure 4 – 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 5). 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 they may change applications from there if needed. 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 different programs with different a user name and password than the P number for MOTS.



**Figure 5 – MOTS Home Page**

## 8.1 MOTS Main Tabs

### 8.1.1 HOME

#### 8.1.1.1 Messages

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

#### 8.1.1.2 My Settings

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

The Change My Password functionality will be added at a later time. Currently it will not allow you to change your password and you must contact the OIS Service Desk to change your password. You can also change your password at <https://dhs.oregon.gov> when your password has expired.

### 8.1.2 ADMIN

This tab is the tab most often used by a System Administrator. This tab opens all the necessary pages to set up and maintain agency/facility profiles. Job functions for a System Administrator are explained in section [5.1 System Admin Functions](#).

### 8.1.3 HELP

This tab provides the user with helpful documents and resources to assist with successful MOTS administration and data submission.

### 8.1.4 CLIENT ENTRY

This tab will only be provided to users that 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.

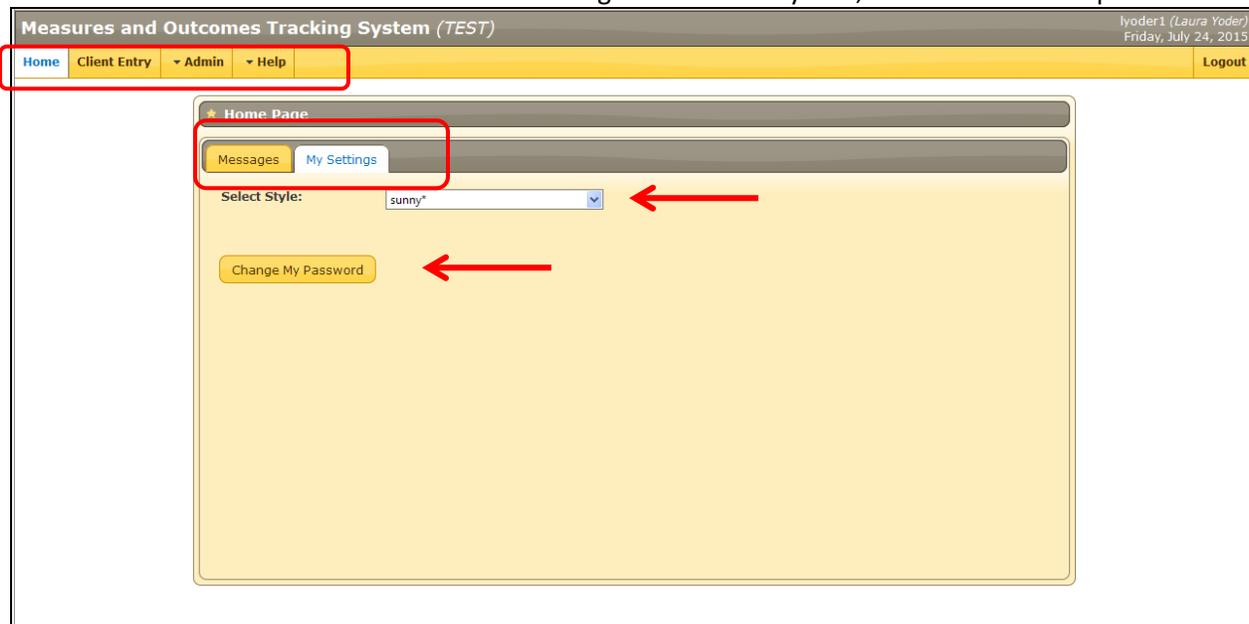


Figure 6 – MOTS Home Page – My Setting Tab

## 9 Agency and Facility System Admin Level Functions

### 9.1 Agency System Admin Functions

#### 9.1.1 Agency Maintenance

The agency maintenance feature is accessed in order to complete the agency set up process or to update the agency or facility profile pages. The registration process should already be complete.

#### 9.1.2 Agency Profile for Agency Set Up

##### 9.1.2.1 Agency/Facility Search

1. Log in to MOTS.
2. Select Agency Maintenance from the Admin menu.
3. Search for agency by any of the search fields and click Search button. If user only has access to one agency, the system will automatically take user to the profile page of the agency.
4. Find the agency searched for and click on the agency.

Note: Within the MOTS application, users can search by using portions of word or letters. No wildcard such as \* is necessary.

Note: Agency/facility names will be displayed throughout the MOTS system by the DBA (Doing Business As). If a DBA is not provided, then the Business Name will display for the agency/facility. Business names are the names associated with the OR Medicaid Provider Number.

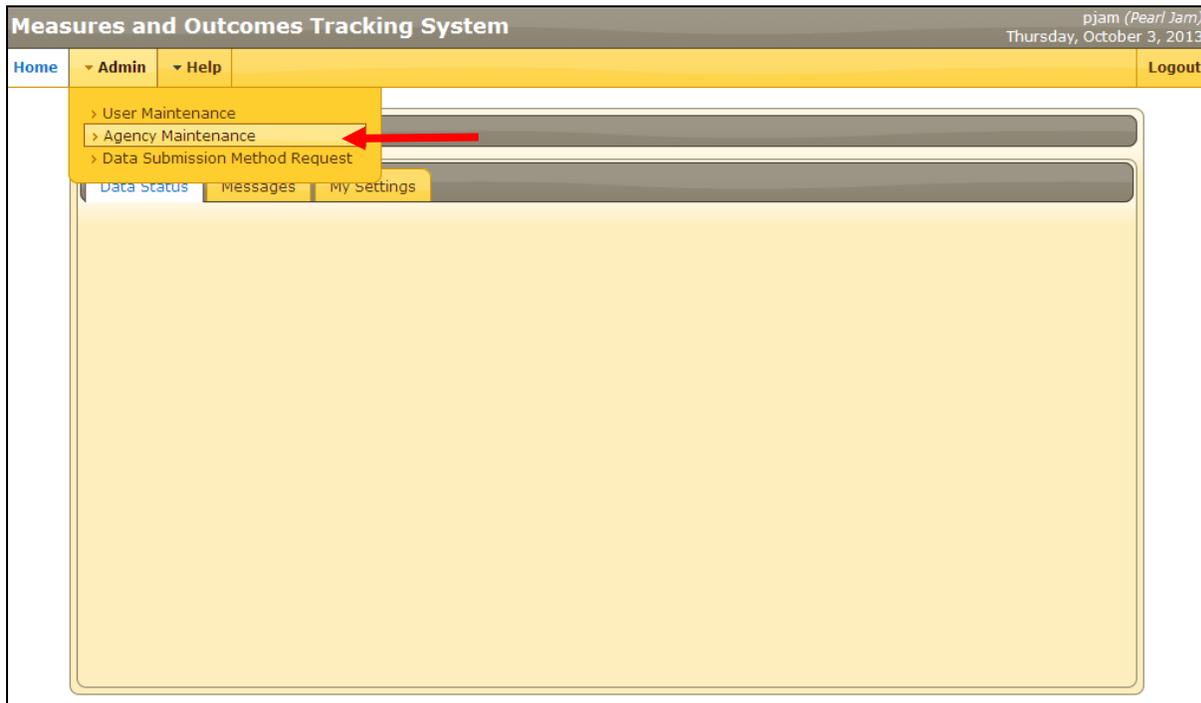


Figure 7 – MOTS Agency Maintenance

Measures and Outcomes Tracking System pjam (Pearl Jam)  
Wednesday, October 2, 2013

Home Admin Help Logout

**Agency/Facility Search**

OR Medicaid Provider ID:  Status:

Name:  DBA:

---

Show  entries Search:

Type	OR Medicaid ID	Agency/Facility Name	Street	City	Status
AGENCY	500400239	Roseburg Office	345 A Street	Roseburg	Active
AGENCY	500601066	Passages	6456 Ocean Drive	Malibu	Active
FACILITY	500400239	Coos Bay Office	567 Sunset Drive	Coos Bay	Active
FACILITY	500400239	Roseburg Office	345 A Street	Roseburg	Active
FACILITY	500400239	Roseburg Office	345 A Street	Roseburg	Active
FACILITY	500601066	Passages	6456 Ocean Drive	Malibu	Active

Showing 1 to 6 of 6 entries

**Figure 8- Agency/Facility Search**

### 9.1.2.2 Complete Agency Profile

1. All information entered during the registration process will auto-populate into the Agency Profile page.
2. Continue to enter all required fields and desired optional fields. Also update any populated fields that are incorrect if necessary.
3. Click Update. If all required fields are not complete, messages will appear. Agency profile information will not be “active” unless all required fields are complete. If all required fields are not complete, user can leave screen, but profile will be in “draft” status. Agency will not be allowed to submit data until profile is *active*. By clicking on the Update button, all information completed will save as a draft and agency profile will be flagged in draft mode until all required fields are completed successfully.
4. Click the Add Agency Contacts button.
5. Enter desired contact information and click on Save button. If user does not complete the required fields, the information will not save. If user has completed all required fields and clicks save, the information will save and the section closes.
6. Follow steps 4-5 to enter additional contacts as desired.
7. If agency and facility are the same, click the “Agency is also facility” button and continue to section [9.1.2.3 Add Facilities](#).
8. Click the Add Facility button if user has additional facilities to set up associated with user’s agency.

NOTE: You must choose a Preferred Method of Contact in order to register your agency and facility.

**\*NOTE on Oregon Medicaid provider numbers used for facilities.**

If an Agency has multiple facilities, they must have a unique Oregon Medicaid provider number for each facility.

All agencies MUST enter at least one facility.

**Measures and Outcomes Tracking System** pjam (Pearl Jam)  
Wednesday, October 2, 2013

Home **Admin** Help Logout

---

**Agency Profile**

Business Name:  DBA:  (Optional)

OR Medicaid Provider ID:  OR Medicaid Provider ID:  (Optional)

Account Status: Active Account Status Date: 10/02/2013

Office Email:  (Optional) Office Phone:  Ext:  (Optional)

Fax:  (Optional) Preferred Method of Contact:  (v)

Physical Address:  City:  State:  (v)

Zip:  County:  (v)

---

**Agency Contacts**

Show  entries Search:

Name	Role	Email	Phone	Primary Contact
<a href="#">Anderson, Sharon</a>	Billing Specialist	sharon.l.anderson@state.or.us	(754)893-7582	N
<a href="#">Coe, Greta</a>	System Administrator	greta.l.coe@state.or.us	(503)654-9863	Y
<a href="#">KKahn, Ben</a>	Program Manager	ben.kahn@state.or.us	(485)374-6863	N

Showing 1 to 3 of 3 entries

---

**Facilities**

Show  entries Search:

OR Medicaid ID	Facility Name	Street	City	Status
<a href="#">500601066</a>	<a href="#">Passages</a>	<a href="#">6456 Ocean Drive</a>	<a href="#">Malibu</a>	Active

Showing 1 to 1 of 1 entries

Figure 9 – Agency Profile

**Agency Contacts**

Show **10** entries Search:

Name	Role	Email	Phone	Primary Contact
<a href="#">Vermeer, Piet</a>	System Administrator	piet.j.vermeer@state.or.us	(503)945-5960	Y

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

Role:  Primary Contact:

First Name:  Last Name:  Email:

Phone:  Ext:  (Optional)

**Figure 10 – Agency Contacts**

### 9.1.2.3 Add Facilities

1. Enter Medicaid Provider Number (the business name will auto-populate based on the official business name within the Medical Assistance Programs database).
2. Complete all required fields.
3. Click Save.

**Measures and Outcomes Tracking System** or0106571 (Greta Coe)  
Wednesday, October 2, 2013

Home **Admin** Help Applications Logout

---

**Facility Profile**

Business Name:  DBA:  (Optional)

OR Medicaid Provider ID:  OR Medicaid Provider ID:  (Optional)

Account Status:  Account Status Date:

Office Email:  (Optional) Office Phone:  Ext:  (Optional)

Fax:  (Optional) Preferred Method of Contact:

Physical Address:  City:

State:  County:

Zip:

**Contracted With**

Show  entries Search:

Medicaid ID	Parent Provider	Effective Date	Expiration Date
<a href="#">500656552</a>	Confederated Tribes of Warm Springs	05/04/2013	

Showing 1 to 1 of 1 entries

**Facility Contacts**

Show  entries Search:

Name	Role	Email	Phone	Primary Contact
No data available in table				

Showing 0 to 0 of 0 entries

**Figure 11 – Facility Profile**

- Proceed to section [9.4 User Maintenance](#) to set up facility system admin and/or general user’s access to system. If the Agency System Admin is also acting as the Facility System Admin, continue to section [9.2 Agency/Facility Admin Level Functions](#).

## 9.2 Agency/Facility Admin Level Functions

### 9.2.1.1 Update and Complete Facilities Profile

If Facility System Administrator and it’s the first time into the system:

- Follow instructions within section [9.1.2.1 Agency/Facility Search](#), steps 1-2.

2. Search for facility. If facility found, click on facility name. If facility not found, the facility system administrator has not been given the access to the facility. Contact Agency System Admin to review and update access level and roles of Facility System Admin.
3. Update any completed field and desired optional fields and click Save button.
4. In the “Contracted with” section, click on Add Contracted with button.
5. Select all entities with which the agency is contracted. “Contracted with” is the entity(s) from which funds are received, such as a CMHP or other contractors. It is crucial to accurately identify all entities with which the agency is contracted so that submissions for non-Medicaid service data are successful.
6. Click Save. Repeat steps 4-6 to enter additional “contracted with” entities.
7. Click the Add Facility Contacts button.
8. Enter desired contact information and click Save.
9. Each facility must have a primary contact in order to receive reports and notifications.
10. Follow steps 7-9 to enter additional contacts as desired.

**NOTE:** You must choose a Preferred Method of Contact in order to register your agency and facility. If Agency System Admin is also functioning as a Facility System Admin:

1. Continue process above in section [9.2.1.1 Update and Complete Facility Profile](#), steps 1-9.

**Measures and Outcomes Tracking System** or0106571 (Greta C98)  
Wednesday, October 2, 2013

Home **Admin** Help Applications Logout

### Facility Profile

Business Name:  DBA:  (Optional)

OR Medicaid Provider ID:  OR Medicaid Provider ID:  (Optional)

Account Status:  Account Status Date:

Office Email:  (Optional) Office Phone:  Ext:  (Optional)

Fax:  (Optional) Preferred Method of Contact:

Physical Address:  City:

State:  County:

Zip:

#### Contracted With

Show 10 entries Search:

Medicaid ID	Parent Provider	Effective Date	Expiration Date
500656552	Confederated Tribes of Warm Springs	05/04/2013	

Showing 1 to 1 of 1 entries

#### Facility Contacts

Show 10 entries Search:

Name	Role	Email	Phone	Primary Contact
No data available in table				

Showing 0 to 0 of 0 entries

**Figure 12 – Facility Profile**

The screenshot shows a web interface titled "Facility Contacts". At the top, there is a "Show 10 entries" dropdown and a "Search:" input field. Below this is a table with the following data:

Name	Role	Email	Phone	Primary Contact
Anderson, Sharon	Administrative Support	Sharon.l.anderson@state.or.us	(503)945-8763	N
Kahn, Ben	Billing Specialist	ben.kaha@state.or.us	(293)759-8475	N

Below the table, it says "Showing 1 to 2 of 2 entries" and includes navigation buttons: "First", "Previous", "1", "Next", "Last".

Underneath the table is a form for editing a contact. It includes:

- Role: [dropdown menu]
- Primary Contact:
- First Name: [text input]
- Last Name: [text input]
- Email: [text input]
- Phone: [text input]
- Ext: [text input] (Optional)

At the bottom right of the form are two buttons: "Save" and "Back".

**Figure 13 – Facility Contacts**

### 9.2.2 Agency and Facility Maintenance and Updates

The agency and facility profile may be updated as desired by the Agency or Facility System Administrator.

1. Log in to MOTS.
2. Select Agency Maintenance from the Admin menu.
3. Search for agency/facility. When agency/facility found, click on agency/facility name.
4. Update any of the fields that are editable.
5. Click Save.

Note: You must choose a Preferred Method of Contact in order to register your agency and facility.

## 9.3 Data Submission Method Request

### 9.3.1 Initial Data Submission Method Request

The System Administrator will need to complete this process for each facility on their initial MOTS log in and profile set up. This page will inform AMH as to the method that the facility will submit their data. The user will see that there are three data types: Status Data & Non-Medicaid Service Data, Mental Health Crisis Data and Involuntary Service Data. Not every facility will submit all three data types. Status Data must be completed. There are two methods for submitting data: Client Entry and Electronic Data Interchange (EDI) from an organization's own electronic health record (EHR) system. EDI data submission type includes OWITS users. All data submission types must be the same.

1. Select Data Submission Method Request from Admin menu.
2. Select agency with which the facility is associated.
3. Select the facility.

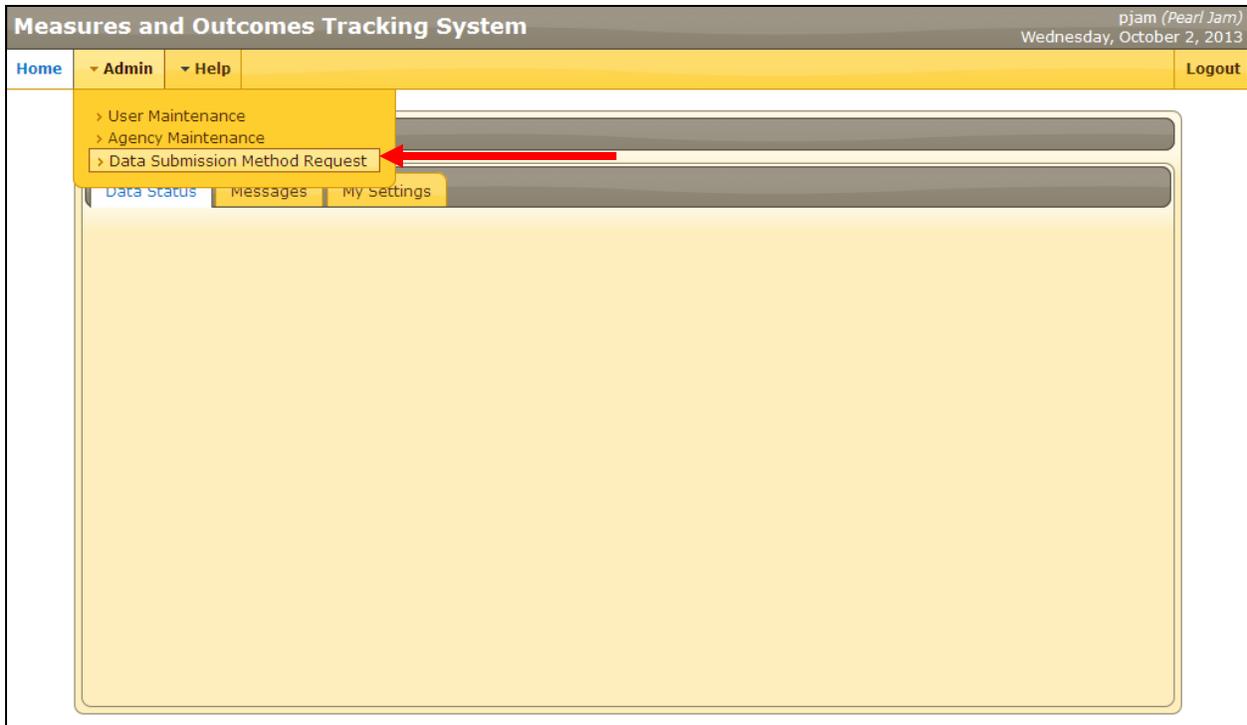
4. Using the radio buttons, indicate desired submission method for all applicable data types. Status & Non-Medicaid Service Data method cannot be Not Applicable. All types of data submitted must use the same data submission method.
5. Enter the proposed date of implementation.
6. Click the Submit button. This will send the request to AMH/MOTS System Admin staff that will review and activate the request. Additionally, the System Admin will receive an email from [amh-applications.ois@state.or.us](mailto:amh-applications.ois@state.or.us) regarding the request.
7. The information submitted on this page will be retained and displayed on this page.
8. When the request has been activated within the system, the System Admin will receive an email from [mots.support@state.or.us](mailto:mots.support@state.or.us) informing of activation.

### ***9.3.2 Change Data Submission Method Request***

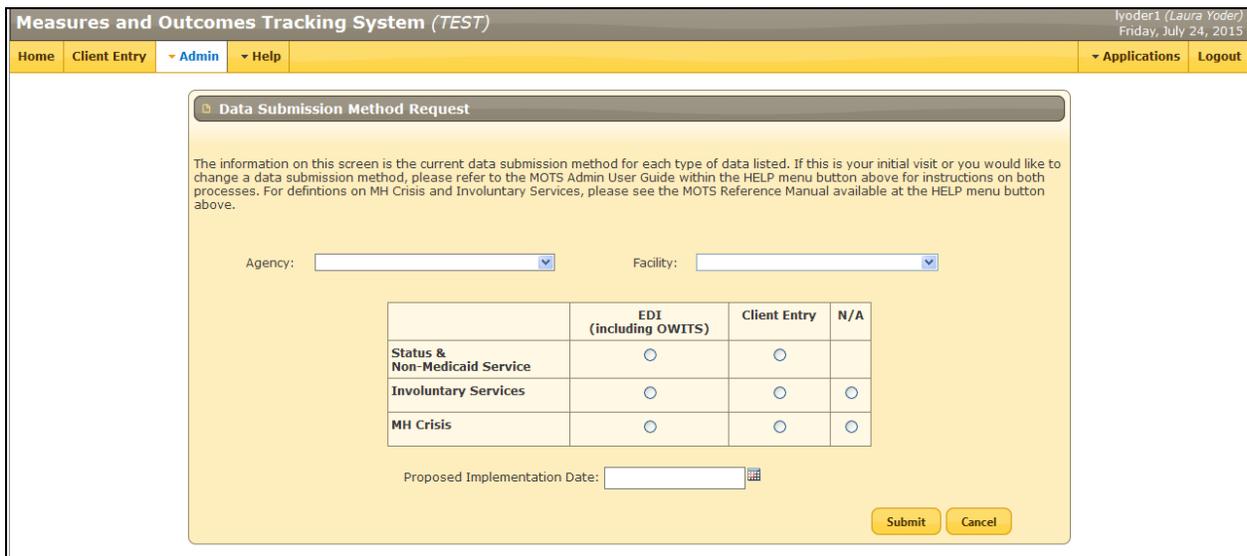
This process would be used to request a change to a facility's initial data submission request.

1. Follow steps 1-3 from section [9.3.1 Initial Data Submission Method Request](#).
2. The screen that displays will inform the facility of their current selection. All data submission methods will be the same.
3. Update the data submission method to the type the facility wishes to implement.
4. Enter the proposed date of implementation.
5. Click the Submit button. This will send the request to AMH/MOTS System Admin staff that will review the request and contact the Facility System Admin regarding implementation transition process and eventually activate the request. Additionally, the Facility System Admin will receive an email from [amh-applications.ois@state.or.us](mailto:amh-applications.ois@state.or.us) regarding the request.

The new information updated on the screen prior to clicking on the Submit button will not be displayed on this page. This page will always display the current data submission method of the facility.



**Figure 14 – Data Submission Method Request**



**Figure 15 – Data Submission Method Request**

## 9.4 User Maintenance

The user maintenance process is used to manage user profiles and MOTS access.

### 9.4.1 Add New User

1. Log in to MOTS.

2. Select User Maintenance from the Admin menu.
3. Enter the last name, first name, or user name of the user to be added.
4. Click Search.
5. If not found, Click the Add New User button.

NOTE: If user is found, please go to section [9.4.2 Update User](#).

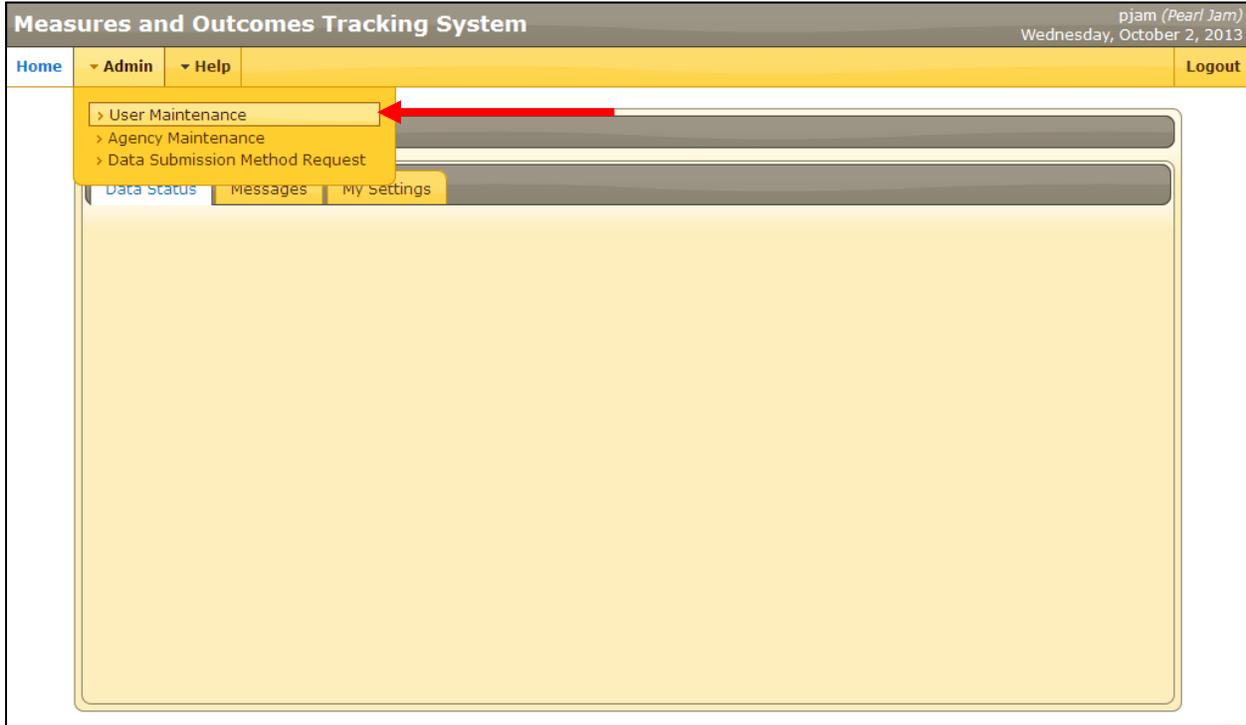


Figure 16– User Maintenance

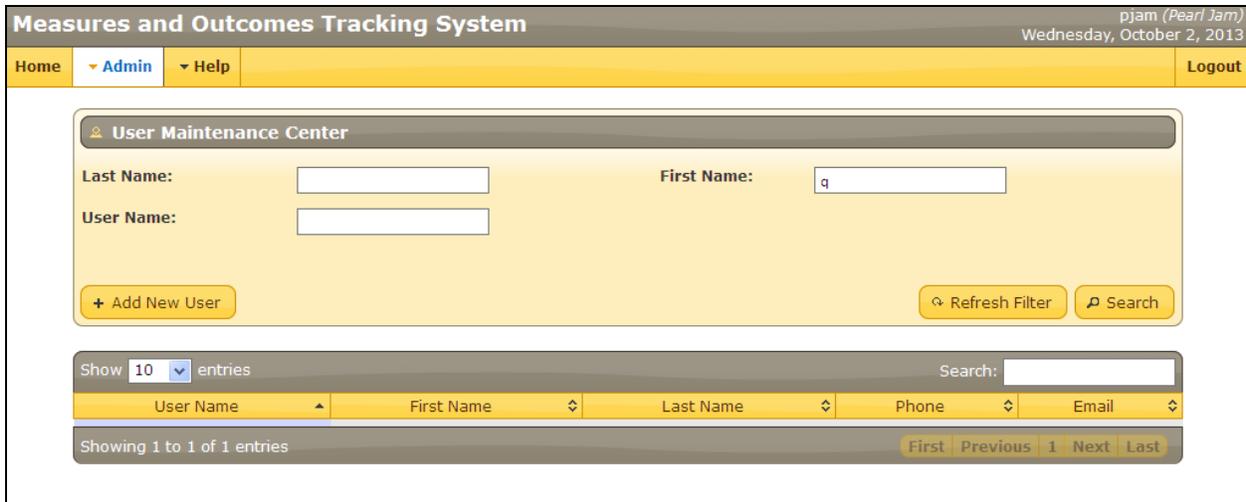


Figure 17 – User Maintenance - User Search

### 9.4.1.1 New User Screen/Account Tab

1. This will take the user to the New User screen. Enter user information, making sure to use the state-assigned P number as the user name.
2. Click Save.
3. Click the Applications tab.

The screenshot shows the 'Measures and Outcomes Tracking System' interface. The top navigation bar includes 'Home', 'Admin', and 'Help' tabs, with 'Admin' selected. The user is logged in as 'pjam (Pearl Jam)' on 'Wednesday, October 2, 2013'. The main content area is titled 'User Maintenance Center - New User' and contains a form with the following fields: 'User Name:', 'Email:', 'Last Name:', 'Primary Organization:', 'Phone Number:', and 'First Name:'. Below the form is a tabbed interface with 'Account' and 'Applications' tabs, where 'Applications' is selected. At the bottom of the form are three buttons: 'Back', 'Delete User', and 'Save'.

Figure 18 – User Maintenance – Add New User/Account tab

### 9.4.1.2 Application Tab

1. Select Measures and Outcomes Tracking System from the list of applications.
2. Click Add Application to User button.
3. Click Save.
4. Click on the Agency tab.

**Measures and Outcomes Tracking System** pjam (Pearl Jam)  
Wednesday, October 2, 2013

Home Admin Help Logout

User Maintenance Center - Edit User: pjam

User Name: pjam [online](#)

Email:  Phone Number:

Last Name:  First Name:

Primary Organization:

Account Applications Agency Facility

**Applications:**     **Application Description:**

+ Add Application to User

**Current Applications:**

**Measures and Outcomes Tracking System**  
MOTS is AMH's data collection and outcomes measurement system that will capture data submitted from community-based behavioral health service providers.

Remove Application

Back Delete User Save

Figure 19 – User Maintenance- Applications Tab

### 9.4.1.3 Agency and Roles Tab

1. Select the agency the user is associated with. Roles available for that agency will show up in the Role drop down list: Read and Write.
2. Select role and click Add Role to User button.
3. Repeat step 1-2 if user is associated with more than one agency or needs additional roles. Agency and roles will show up in the Current Agency Roles area at the bottom of the screen.
4. Click Save.

#### Roles and Access Table

Group	Roles
Agency Administrator	Admin
This group has the ability of all roles below.	Persons with Admin capabilities will be able to access the system to Read and Write information and to request merge and unmerge functions within the MOTS system for their agency and associated Facility(s).
Facility Administrator	Admin
This group has the ability of all roles below.	Persons with Admin capabilities will be able to access the system to Read and Write information and to request merge and unmerge functions within the MOTS system for their facility.
User	Write
This group has the ability of all roles below.	Persons with Write capabilities will be able to access the system to Read and Write information.
Viewer	Read
This group has only the ability of the role within this level.	Persons with Read capabilities will be able to access the system to search for and view data and to create reports.

**Figure 20 – Roles and Access Table**

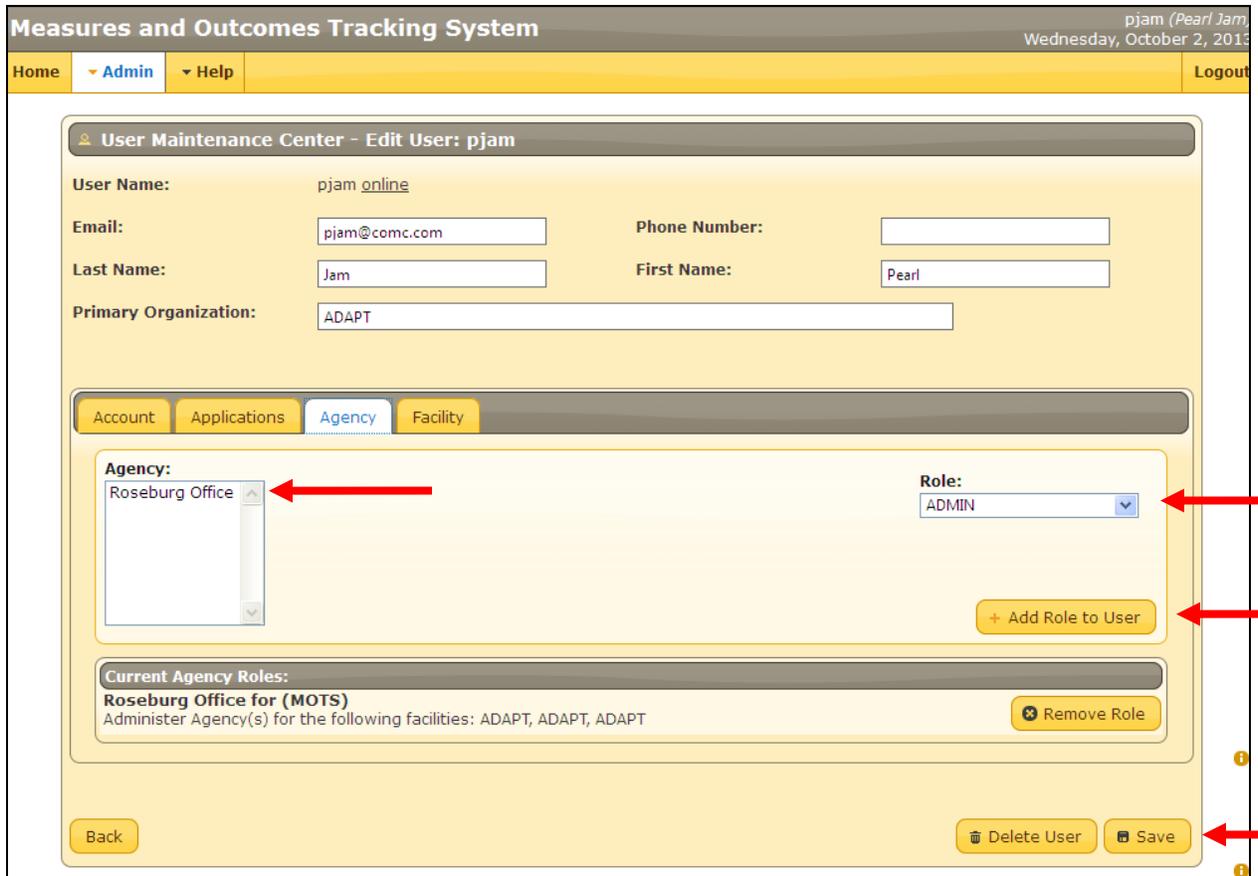


Figure 21 – User Maintenance- Agency and Roles tab

#### 9.4.1.4 Facility and Roles Tab

1. Select the agency the user is associated with.
2. Select the facility the user is associated with under the Facility Tab.
3. Roles available for that facility will show up in the Role drop down list: Admin, Read and Write.
4. Select role and click Add Role to User button.
5. Repeat step 1-4 as often as necessary to assign all desired facilities and roles to user. Facilities and roles will show up in the Current Facility Roles area at the bottom of the screen.
6. Click Save.

**User Maintenance Center - Edit User: pjam**

User Name: pjam online

Email:  Phone Number:

Last Name:  First Name:

Primary Organization:

Account Applications Agency **Facility**

**Agency:**

**Facility:**

**Role:**

**Current Facility Roles:**

<b>Roseburg Office for (MOTS)</b> Administer Agency(s)	<input type="button" value="Remove Role"/>
<b>Coos Bay Office for (MOTS)</b> Administer Agency(s)	<input type="button" value="Remove Role"/>

Figure 22 – User Maintenance- Facility and Roles tab

## 9.4.2 Update User

1. Log in to MOTS.
2. Select User Maintenance from the Admin menu.
3. Enter the last name, first name, or user name of the user to be updated.
4. Click Search.

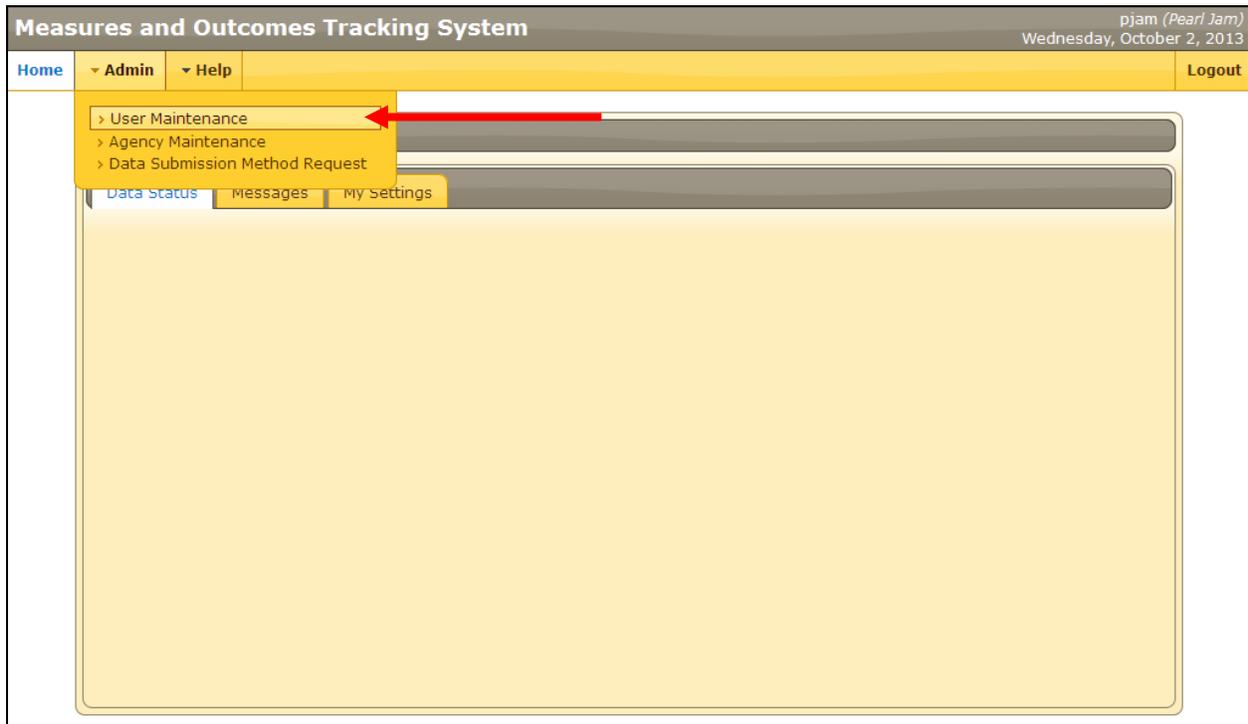


Figure 23 – User Maintenance

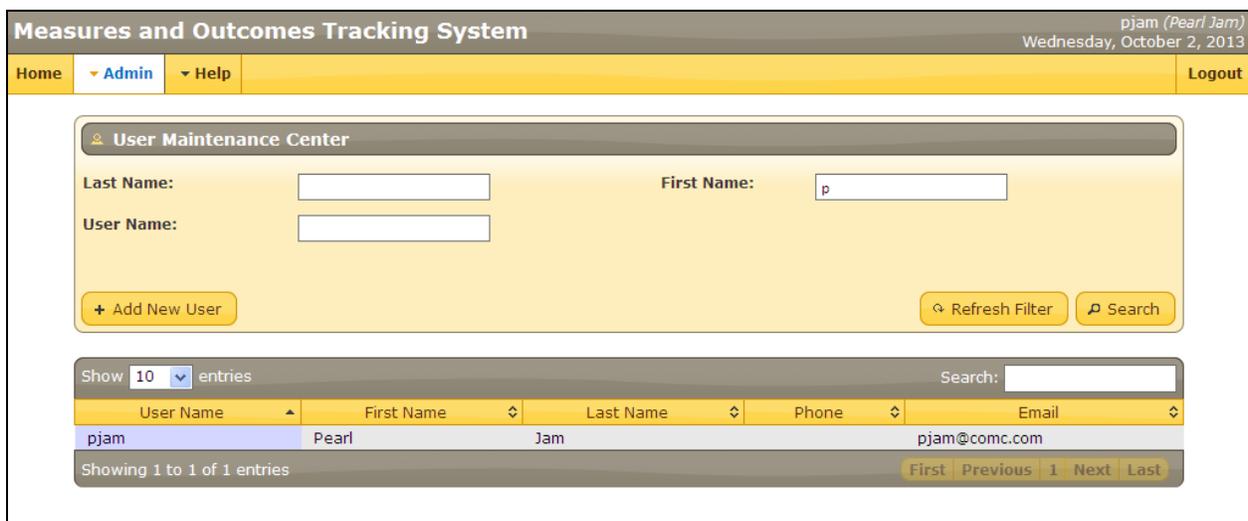


Figure 24 – User Maintenance - User Search

5. From the list of users in the search results, click on the user to be updated.
6. Modify user information as desired.
7. Click Save.

The screenshot displays the 'Measures and Outcomes Tracking System' interface. At the top, the system name is on the left, and the user 'pjam (Pearl Jam)' and date 'Wednesday, October 2, 2013' are on the right. A navigation bar includes 'Home', 'Admin', 'Help', and 'Logout'. The main content area is titled 'User Maintenance Center - Edit User: pjam'. It contains several form fields: 'User Name' (pjam online), 'Email' (pjam@comc.com), 'Last Name' (Jam), 'Primary Organization' (ADAPT), 'Phone Number' (empty), 'First Name' (Pearl), 'Login Attempts' (0), 'Account Status' (Active), 'Last Login' (10/02/2013 09:24 AM), and 'First Login' (09/30/2013 09:06 AM). Below these fields are tabs for 'Account', 'Applications', 'Agency', and 'Facility'. At the bottom, there are 'Back', 'Delete User', and 'Save' buttons.

Figure 25 – User Maintenance - Edit User Page

### 9.4.3 Reset user login attempts

1. Follow steps 1-4 in section [9.4.2 Update User](#).
2. The Account tab will have login attempts and account status fields open for editing. If a user has been locked out of MOTS due to too many failed login attempts, the Agency System Admin will reset the user. To reset, click the small circular arrow beside the Login Attempts field. This will reset the number to 0.
3. Reset and verify Account Status is Active.
4. Click Save.

The screenshot shows the 'Measures and Outcomes Tracking System' interface. At the top, it says 'pjam (Pearl Jam)' and 'Wednesday, October 2, 2013'. The navigation bar includes 'Home', 'Admin', 'Help', and 'Logout'. The main content area is titled 'User Maintenance Center - Edit User: pjam'. It contains several fields: 'User Name: pjam online', 'Email: pjam@comc.com', 'Phone Number: [empty]', 'Last Name: Jam', 'First Name: Pearl', and 'Primary Organization: ADAPT'. Below these is a tabbed interface with 'Account', 'Applications', 'Agency', and 'Facility' tabs. The 'Account' tab is active and shows 'Login Attempts: 0' with a circular arrow icon next to the number, and 'Account Status: Active' with a dropdown arrow. Below this are 'Last Login: 10/02/2013 09:24 AM' and 'First Login: 09/30/2013 09:06 AM'. At the bottom, there are 'Back', 'Delete User', and 'Save' buttons. Two red arrows point to the circular arrow icon and the 'Account Status' dropdown arrow.

Figure 26 – User Maintenance – Account Tab- Reset Login Attempts

### 9.4.4 Reset Passwords

Before contacting the DHS/OHA Service desk, please contact [MOTS.Support@state.or.us](mailto:MOTS.Support@state.or.us) to determine if the issue requires a password reset.

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 should know their P number in order to best assist the Service Desk in resetting your password. The Service Desk will reset the password and provide instructions on how to again access the system.

#### 9.4.4.1 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). No special characters allowed.
- 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 will suspend or disable the user's ability to successfully log-on.
- Passwords will expire in 90 days.
- User cannot repeat the last 5 passwords.

#### **9.4.5 *Expired Passwords***

Passwords within the system will expire within 90 days. If 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:  
[https://aix-xweb1p.state.or.us/amh\\_xweb/amh/](https://aix-xweb1p.state.or.us/amh_xweb/amh/).

See Section [9.4.4.1 Password Criteria](#) for information on criteria.

#### **9.4.6 *Reset Account Status***

Reset account status allows the System Admin to inactivate a user account without deleting the user. This function could be used when a user is on administrative or medical leave and will not need access to the system for a period of time.

1. Follow steps 1-4 in section [9.4.2 Update User](#).
2. Click the Account tab.
3. Select Active, Disabled, or Locked for account status.
4. Click Save.

**Measures and Outcomes Tracking System** pjam (Pearl Jam)  
Wednesday, October 2, 2013

Home **Admin** Help Logout

---

**User Maintenance Center - Edit User: pjam**

User Name: pjam\_online

Email:  Phone Number:

Last Name:  First Name:

Primary Organization:

---

Account Applications Agency Facility

Login Attempts:  Account Status:  

Last Login: 10/02/2013 09:24 AM First Login: 09/30/2013 09:06 AM

Back Delete User Save

**Figure 27 – User Maintenance- Account Tab - Reset Account Status**

#### **9.4.7 Modify Applications for User Access**

1. Follow steps 1-4 in section [9.4.2 Update User](#).
2. Click the Applications tab.
3. Select Application from Application field that user wishes to add and click Add Application to User button.
4. Review the Current Application area for accuracy.
5. Select the application the user wishes to remove by selecting the Remove Application button corresponding to the application that needs to be removed.
6. Click Save.

NOTE: When staff no longer need access to MOTS for any reason including change in job duties , it is imperative that access to MOTS be removed immediately to ensure federal Health Insurance Portability and Accountability (HIPAA) Privacy and Security regulations are followed.

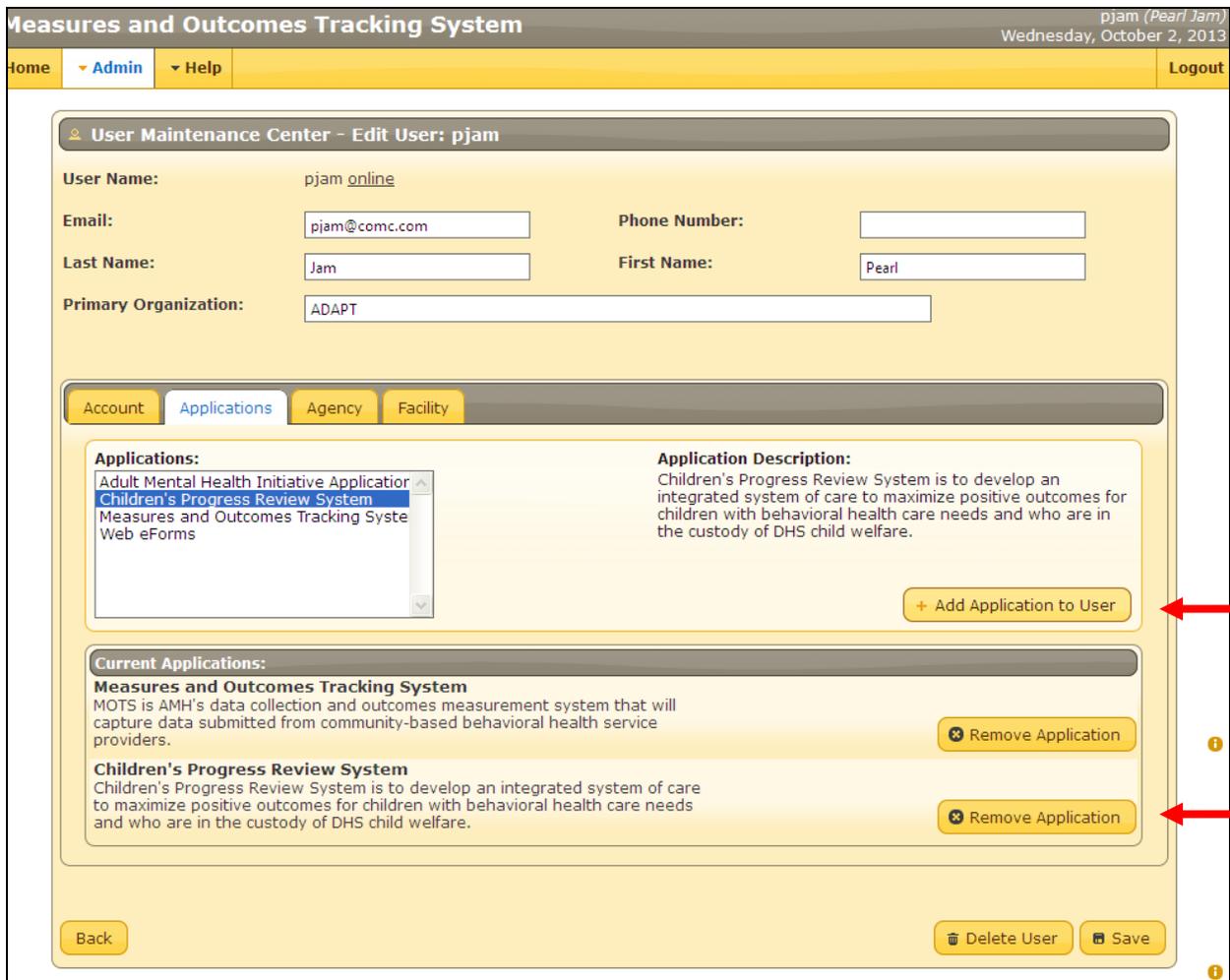
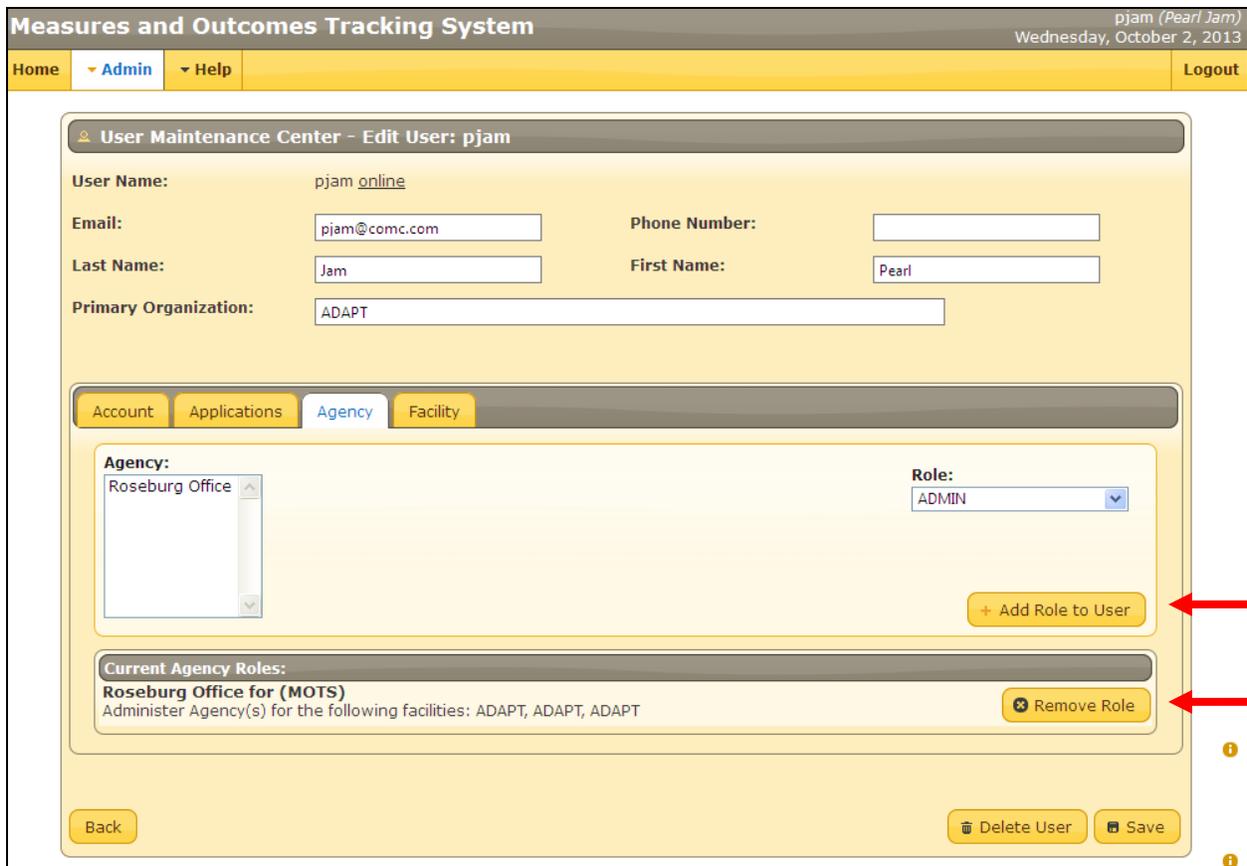


Figure 28 – User Maintenance - Modify Applications Tab

#### 9.4.8 *Modify Agency Access*

1. Follow steps 1-4 in section [9.4.2 Update User](#).
2. Click the Agency tab.
3. Select the agency the user is associated with. Roles available for that agency will show up in the Role drop down list.
4. Select role and click Add Role to User button.
5. Repeat step 4 as often as necessary to assign all desired roles to user. Roles will show up in the Current Agency Roles area at the bottom of the screen.
6. Under the Current Agency Roles area, user can remove roles by selecting the Remove Role button that corresponds with the agency and roles that need to be removed.
7. Click Save.



**Figure 29 – User Maintenance - Modify Agency and Roles**

### 9.4.9 *Modify Facility Access*

1. Follow steps 1-4 in section [9.4.2 Update User](#).
2. Click the Facility tab.
3. Select the agency the user is associated with. Associated facilities will show in the Facility list.
4. Select the facility the user is associated with. Roles available for that facility will show up in the Role drop down list.
5. Select role and click Add Role to User button.
6. Repeat step 4 as often as necessary to assign all desired roles to user. Roles will show up in the Current Facilities Roles area at the bottom of the screen.
7. Under the Current Facility Roles area, user can remove roles by selecting the Remove Role button that corresponds with the facility and roles that need to be removed.
8. Click Save.

Measures and Outcomes Tracking System pjam (Pearl Jam)  
Wednesday, October 2, 2013

Home Admin Help Logout

---

**User Maintenance Center - Edit User: pjam**

User Name: pjam online

Email:  Phone Number:

Last Name:  First Name:

Primary Organization:

---

Account Applications Agency **Facility**

**Agency:**

**Facility:**

Role:

---

**Current Facility Roles:**

<b>Roseburg Office for (MOTS)</b> Administer Agency(s)	<input type="button" value="Remove Role"/>
<b>Coos Bay Office for (MOTS)</b> Administer Agency(s)	<input type="button" value="Remove Role"/>

Figure 30 – User Maintenance - Modify Facility and Roles

### 9.4.10 Delete a User

When a user no longer requires access to MOTS it is important to delete them from the system immediately. It is the responsibility of the Agency/Facility Administrator to do this.

1. Follow steps 1-4 in section [9.4.2 Update User](#).
2. At the bottom of the screen, click Delete User button.

The screenshot displays the 'Measures and Outcomes Tracking System' interface. At the top right, it shows 'pjam (Pearl Jam)' and the date 'Wednesday, October 2, 2013'. The navigation bar includes 'Home', 'Admin', and 'Help'. The main content area is titled 'User Maintenance Center - Edit User: pjam'. It contains several input fields: 'User Name' (pjam online), 'Email' (pjam@comc.com), 'Phone Number' (empty), 'Last Name' (Jam), 'First Name' (Pearl), and 'Primary Organization' (ADAPT). Below these fields are four tabs: 'Account', 'Applications', 'Agency', and 'Facility'. The 'Account' tab is selected, showing 'Login Attempts' (0), 'Last Login' (10/02/2013 09:28 AM), 'Account Status' (Active), and 'First Login' (09/30/2013 09:06 AM). At the bottom of the form, there are three buttons: 'Back', 'Delete User', and 'Save'. A red arrow points to the 'Delete User' button.

Figure 31 – User Maintenance - Delete User

## 10 Trouble Shooting and Technical Assistance

In most cases, user issues can be resolved by the local System Admin. To request AMH assistance, send an email to [MOTS.Support@state.or.us](mailto:MOTS.Support@state.or.us). Include user name and contact information, which Agency/Facility user works with, and a brief description of the problem. Screen shots are helpful, but please don't include protected health information unless sending the request in a secure email. Ideas for improvements to this Admin User Guide are always appreciated.

## 11 Terms and Definitions

Terms	Description
Agency	The second level "provider". This provider type ensures support and structure for the next level of provider, the facility.
AMH	Addictions and Mental Health Services (primary stakeholder)
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.
CMHP	Community Mental Health Program
Data Submission Method	The way a facility will be sending data to MOTS. Options include using the Client Entry tool, using OWITS, or sending a file created from an existing EHR to MOTS.
DBA	Doing Business As
EDI	Electronic Data Interchange. The method by which an electronic file is created and sent to MOTS.
Facility	The third level "provider". A Facility is a place where direct services to a client occur.
Involuntary Services	Involuntary commitment or civil commitment is a legal process through which an individual with symptoms of severe mental illness is court-ordered into treatment in a hospital (inpatient) or in the community (outpatient).
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 or experiencing of an event or situation as an intolerable difficulty that exceeds the person's current resources and coping mechanisms.
MOTS	Measures and Outcomes Tracking System
Non-Medicaid Services	Non-Medicaid services are procedures given to a client where those procedures are paid for with public funds, none of which include Medicaid.

OIS	Office of Information Services
OWITS	OWITS is an electronic health record system that AMH currently manages. OWITS is an option on the data submission method request screen.
Parent Provider	The highest level “provider”; includes LMHAs, CMHPs, and AMH. Parent Provider is responsible for oversight and funding to other provider types. Parent Providers are responsible for the dollars they receive from AMH to ensure that services delivered are effective.
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.