Primary Care Management Module (PCMM) – Mental Health Treatment Coordinator (MHTC)

User Manual

January 2012

Revision History

Date	Description (Patch # if applicable.)	Project Manager	Technical Writer
Jan 2012	SD*5.3*575 - Initial version	Jolie Renee	Amy DeLano

Revision History

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Introduction

Overview of the Primary Care Management Module

The Primary Care Management Module (PCMM) was developed to assist VA facilities in implementing primary care. PCMM supports both primary care and non-primary care teams. Teams are groups of staff members organized for a certain purpose. The software allows you to setup and define a team, assign positions to the team, assign staff to the positions, assign patients to the team, assign patients to practitioners, and reassign patients from one team to another team.

Mental Health Treatment Coordinator Overview

This User Guide supports the Identification of Principal Mental Health Provider (IPMHP) project under the Improve Veteran Mental Health (IVMH) initiative. It explains the new functionality introduced within PCMM to address the critical need to rapidly identify a patient's Mental Health Treatment Coordinator (MHTC) so that veterans with conditions such as depression, suicidal ideation and Post Traumatic Stress Disorder (PTSD) can be treated more quickly and effectively. This affects nurses, physicians, ward clerks, Primary Care Management Module (PCMM) coordinators and all other mental health professionals.

The list below provides a high level overview of the new functionality around Mental Health Treatment Coordinators (MHTCs):

- 24 new roles added: Refer to Appendix A: Standard Position File for a complete listing of positions available in PCMM.
    - o   Addiction Therapist
    - o   Addiction Therapist (MHTC)
    - o   Chaplain
    - o   Chaplain (MHTC)
    - o   Clinical Nurse Specialist (MHTC)
    - o   Clinical Pharmacist (MHTC)
    - o   LPC
    - o   LPC (MHTC)
    - o   MFT
    - o   MFT (MHTC)
    - o   Nurse (RN) (MHTC)
    - o   Nurse Practitioner (MHTC)
    - o   Occupational Therapist
    - o   Occupational Therapist (MHTC)
    - o   Peer Support Staff

- o   Physician Assistant (MHTC)
- o   Physician-Psychiatrist (MHTC)
- o   Psychologist (MHTC)
- o   Recreation Therapist
- o   Recreation Therapist (MHTC)
- o   Social Worker (MHTC)
- o   Rehab/Psych Technician (MHTC)
- o   Voc Rehab Spec/Counselor
- o   Voc Rehab Spec/Counselor (MHTC)
- Ability to create a Mental Health Team

MHTC information will be displayed in CPRS on the patient inquiry and primary care display.

Sensitive Information

To avoid displaying sensitive information regarding our patients and staff, the examples in this manual contain test data. The steps were captured from a testing environment where the staff and patients' personal data is not real data. Real social security numbers (SSNs) and other personal identifiers are not used.

# Mental Health Treatment Process Flow

Mental Health teams are created following similar steps as you would to create a Primary Care team. Additional items have been added to fields to allow you to identify the team as a mental health team. New positions have been created to provide designated MHTC roles. Refer to the business rules section of this manual to obtain further information on how these fields are handled in the system.

Reference the PCMM User Manual if further detail or instruction is needed for PCMM functionality as this manual only covers MHTC PCMM functionality. A link to the PCMM User Manual can be found in the Reference section of this document.
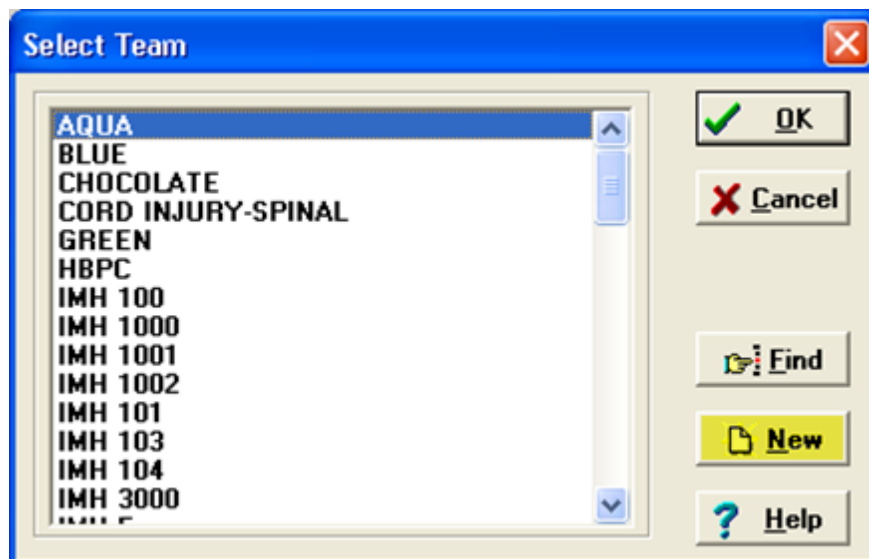
## Creating a Mental Health Team

1. From the main screen after login, select the Team speedbutton from the toolbar located in the upper left of the screen.
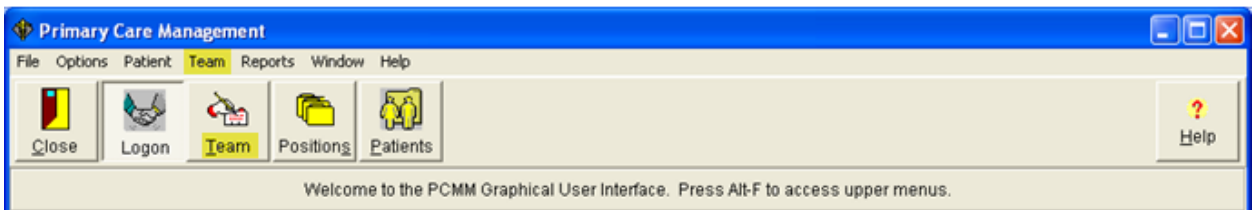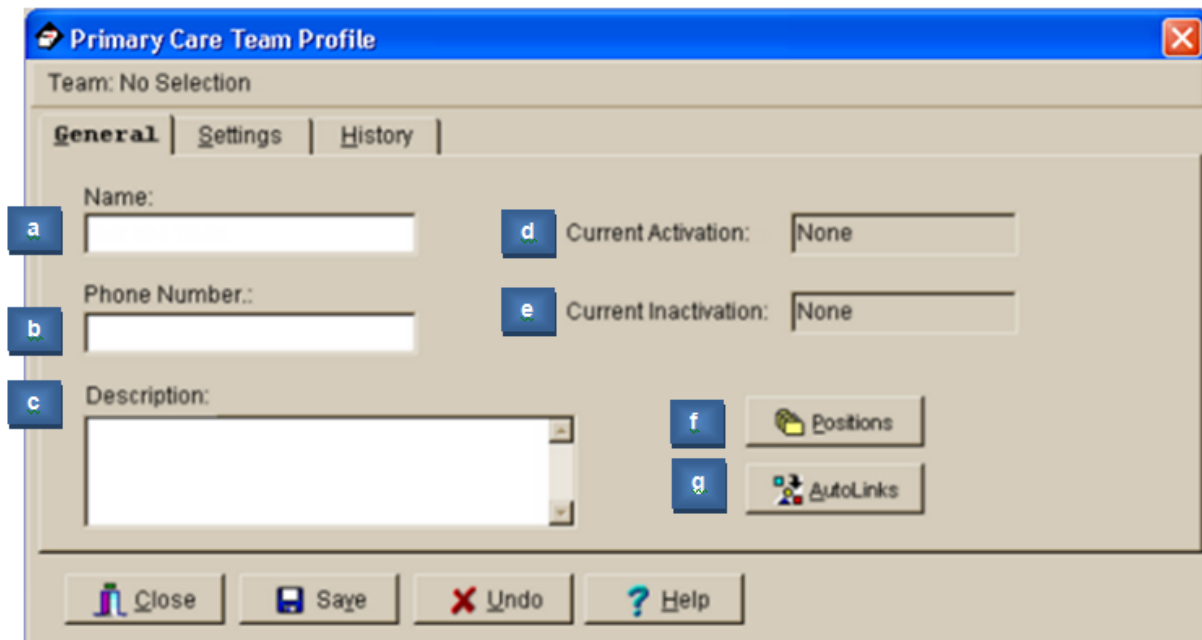

2. In the resulting pop up window, select the New button, as highlighted below to create a new team.

3. After clicking the New button, the team name pop up window appears. Enter in the MHTC Team name in this window's text field, then select OK in the bottom left of this window.

Team Name

Enter New Team Name:

[   ]

[OK]   [Cancel]
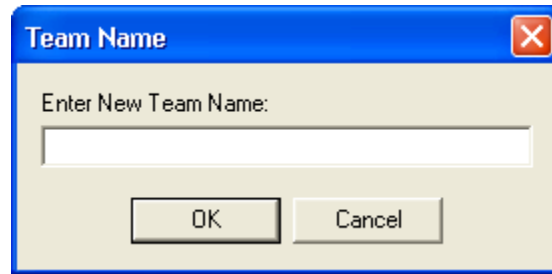
4. The Primary Care Team Profile box appears with the team name populated. Enter in the team information on the General and the Settings tab.

Primary Care Team Profile

Team: No Selection

General | Settings | History

Name:
a [   ]   **d** Current Activation: [None]

Phone Number.:
b [   ]   **e** Current Inactivation: [None]

c Description:
[   ]   **f** 🗂 Positions
                          g 🔗 AutoLinks

🏛 Close   💾 Save   ✗ Undo   ❓ Help

Field Descriptions

a. ***Name (text box)**

The name of the team, 3-30 characters in length. If the new team name matches an existing team name, you will be so notified and asked for a different name.

b. **Phone Number (text box)**

Enter a phone number for the team, 3-20 characters.

c. **Description (text box)**

Any descriptive information specific to the team.

d. **Current Activation (Label)**

This label field displays the most recent activation date for the team.

e. Current Inactivation (Label)

This label field displays the most recent inactivation date for the team.

f. Positions (button)

This button takes you to the Team Positions Setup Screen. This button remains disabled until all required fields are complete with creating the new team.

g. Autolinks (button) (FUNCTIONALITY DISABLED)

TIP: Required fields are signified in this documentation by an asterisk * next to the field name. The SAVE button will not be enabled until all required fields contain information.

5. On the Setting tab, select Mental Health Treatment from the Purpose drop-down list. Then fill in Service, Institution and Team Printer fields as necessary.

Note: Upon selection of Mental Health Treatment, the Primary Care Team check box field to the right will be disabled. A mental health team cannot be set up as a primary care team.

6. Click on the Save icon.

Field Descriptions – Primary Care Team Profile Settings Tab

a. **Purpose (drop down list)**

The Purpose defines the role of the team. Mental Health Treatment would be the purpose for a Mental Health team.

b. **Service (lookup box)**

This is the medical center service most closely associated with the team.

c. **Institution (lookup box)**

This is the entry from the INSTITUTION file (#4) associated with the team. It includes VA and non-VA institutions.

TIP: Each division at a multidivisional facility has its own entry in the INSTITUTION file.

d. **Default Team Printer (lookup box)**

The PCMM reports do not use this field.

e. **Primary Care Team (check box)**

Click in this box if this team can be the primary care team for any patient.

f. Restrict Consults (check box)

Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled.

g. Team Closed (check box)

Click in this box to close the team. Additional patients should not be added to a team if it is designated as closed.

h. Auto-Assign to Team from Clinic (check box)

Click in this box to automatically assign the patient to a team when he is enrolled in a clinic that is an "associated clinic" of one of the team's positions.

i. Auto-Discharge from Team from Clinic (check box)

Click in this box to automatically discharge the patient from a team when he is discharged from a clinic that is an "associated clinic" of one of the team's positions.

j. Team Assignments (text box)

Allowed (numeric display) Maximum number of patients that should be assigned to this team.

Actual (numeric display) Number of patients currently assigned to this team.
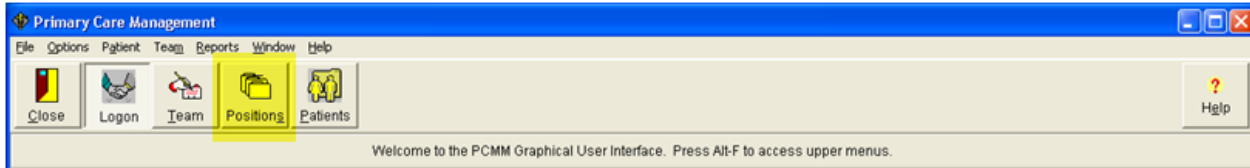
7. The calendar box opens where you would select the team activation date, then select OK.
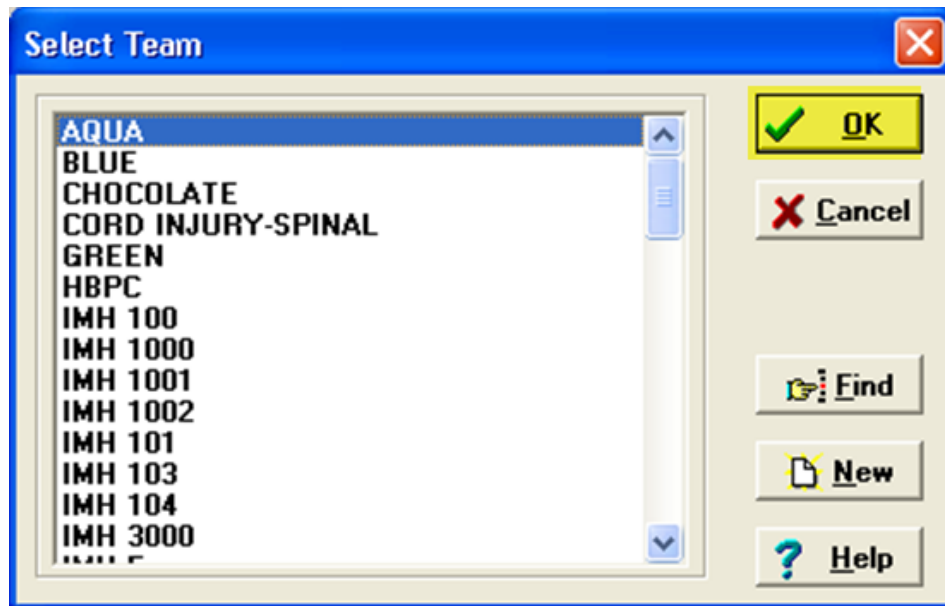
Adding Positions to a Mental Health Team

1. Click on the Position icon in the toolbar at the top of the main screen to start adding positions to the mental health team.

2. In the resulting window, click once on the desired team name to select it, and then click the OK button at the upper right of the Select Team window.

3. If the team has no positions assigned to it, an information box appears. Click the OK button in this box to proceed.
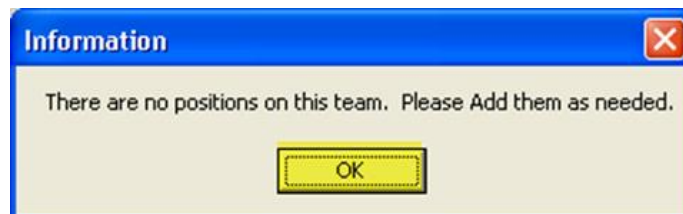
4. The Primary Care Team Position Setup window appears. At the top of the screen validate that the team selected displays at the top of the window, then select the Add New Position icon.

5. Type in the name of the position you wish to add. Select OK.

6. Fill in all required information on the General tab. The Position field will be auto-populated with what was entered in the previous step. Scroll through the drop-down list and select the necessary role associated with the created position. Then select Save.

Note: MHTC positions listed in the drop-down list will display with (MHTC) following the position name. MH Teams can consist of MHTC designated positions as well as non-MHTC designated positions.

Note: PCMM will not allow a Mental Health team to be set up as a Primary Care Team. Therefore when creating positions, the settings options located on the position Settings tab will be disabled (grayed out) as it is related to Primary Care Providers.

7. The calendar box pops up where you select the creation date of the position, then select OK.

You will return to the Primary Care Team Position Setup screen, where the new position created is highlighted yellow.

Repeat Steps 1 – 7 until all necessary positions have been created for the MH Team.

Note: Positions can be created and activated without any staff assigned to them. It is important to assure that staff is assigned to the new position upon creation.

Assigning Staff to Positions

1. Select the Add Staff icon.

2. Type in the name of the staff member and click on the Search icon.
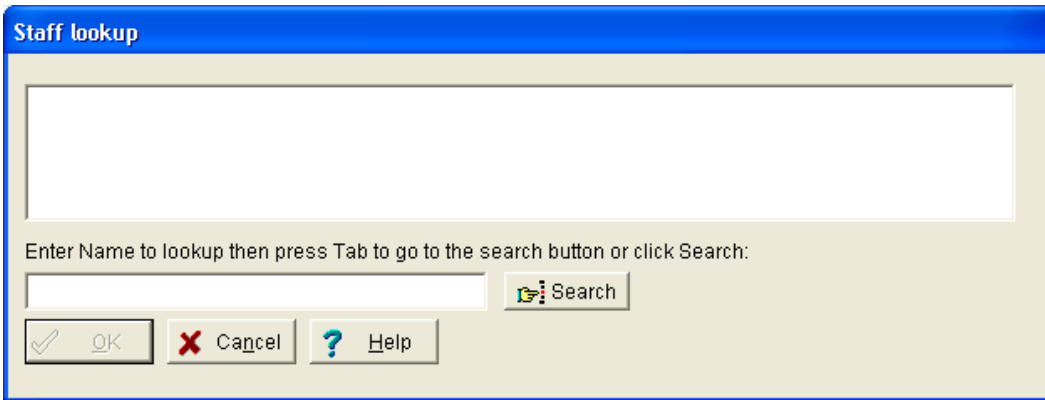
3. Select the appropriate staff member returned in the staff lookup results, then select OK.
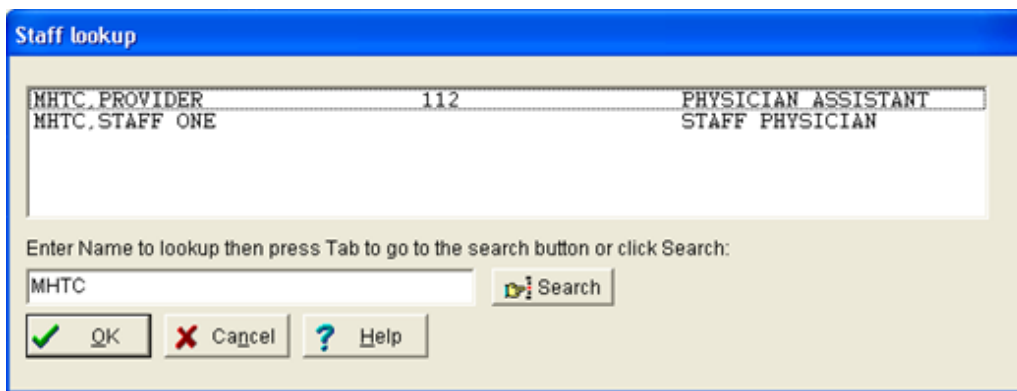
4. The selected staff member's name appears in **BLUE**, Select Save.
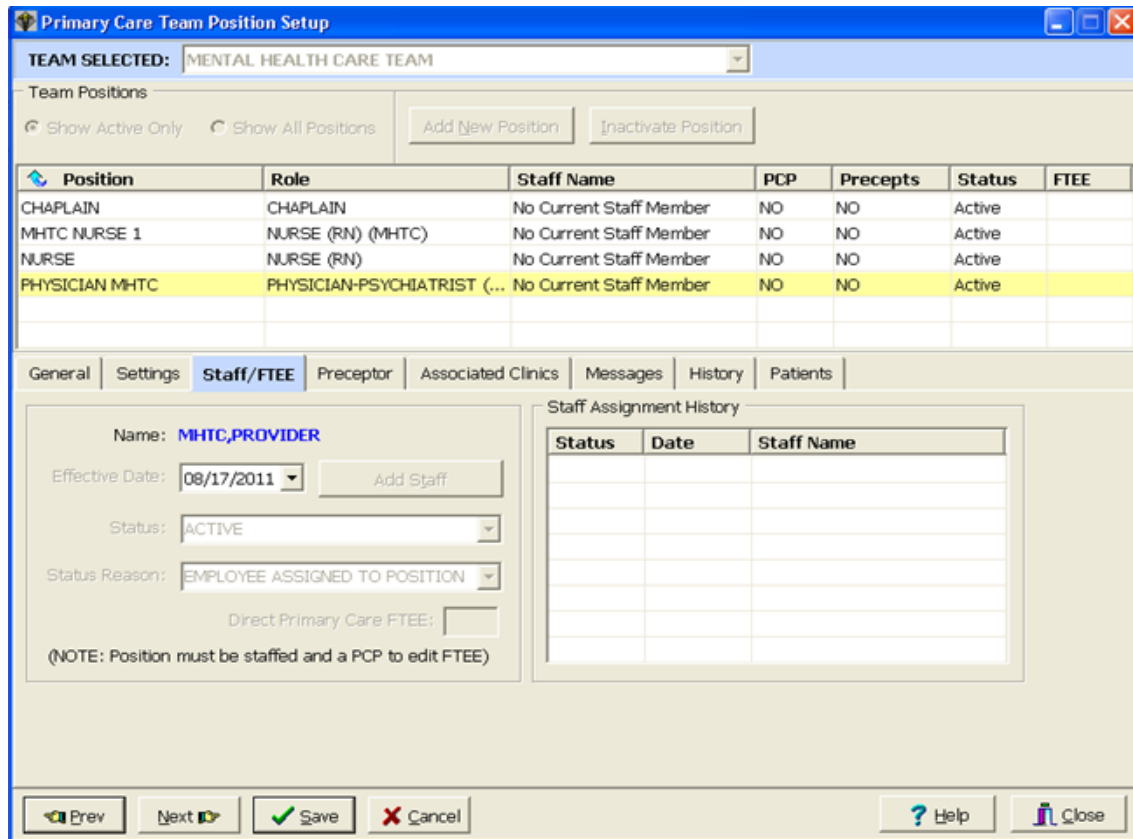
5. The staff member has been successfully added to the team. The staff member appears in the Staff Assignment History box in the lower right of the screen.

   Repeat steps 1 – 4 until all necessary staff members have been assigned to each position associated with the MH Team.

Primary Care Team Position Setup

TEAM SELECTED: MENTAL HEALTH CARE TEAM

Team Positions
⦿ Show Active Only ○ Show All Positions   [Add New Position] [Inactivate Position]

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
CHAPLAIN	CHAPLAIN	No Current Staff Member	NO	NO	Active	
MHTC NURSE 1	NURSE (RN) (MHTC)	No Current Staff Member	NO	NO	Active	
NURSE	NURSE (RN)	No Current Staff Member	NO	NO	Active	
PHYSICIAN MHTC	PHYSICIAN-PSYCHIATRIST (...	MHTC,PROVIDER	NO	NO	Active	

General | Settings | **Staff/FTEE** | Preceptor | Associated Clinics | Messages | History | Patients

Name: MHTC,PROVIDER

Effective Date: 08/17/2011   [Inactivate Staff]

Status: INACTIVE

Status Reason: EMPLOYEE ASSIGNED TO POSITION

Direct Primary Care FTEE:

(NOTE: Position must be staffed and a PCP to edit FTEE)

Staff Assignment History

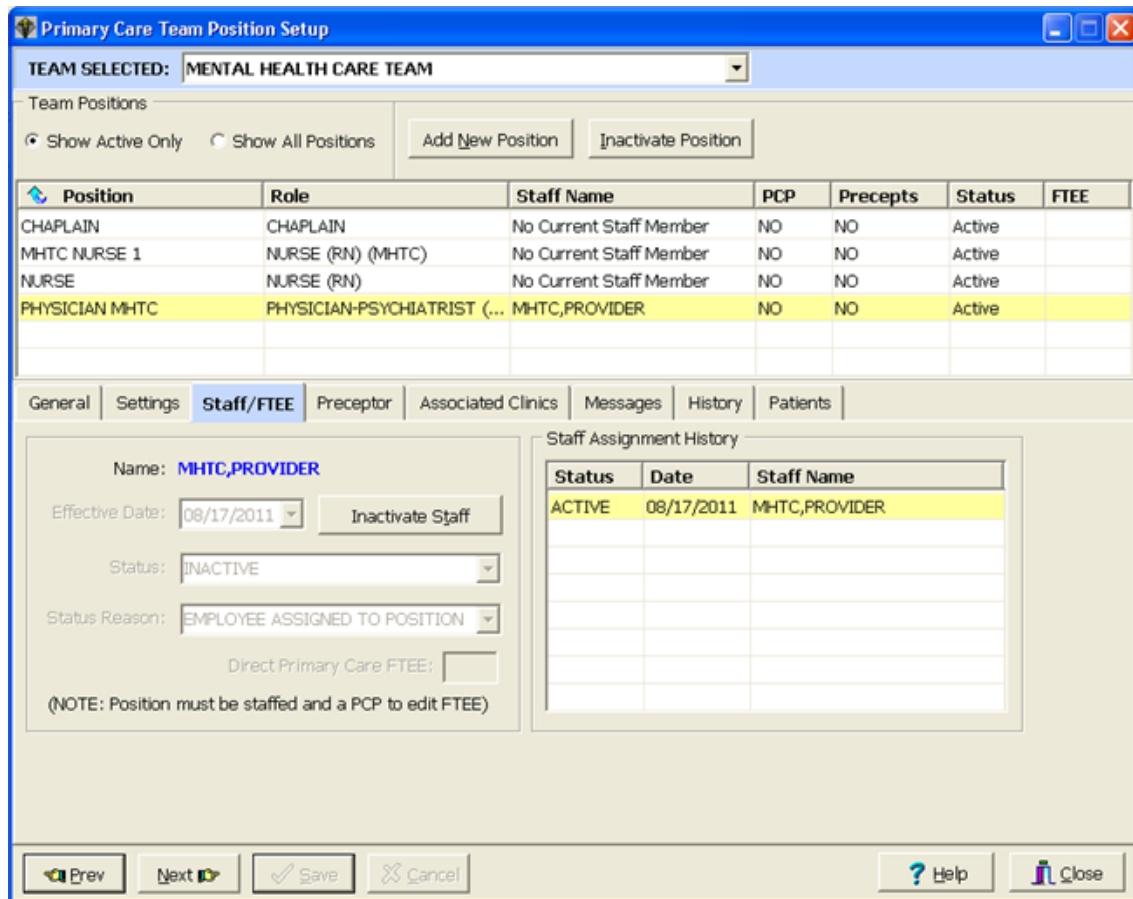| Status	Date	Staff Name
ACTIVE	08/17/2011	MHTC,PROVIDER

[◀ Prev] [Next ▶] [✓ Save] [✗ Cancel]   [? Help] [Close]

PCMM Mental Health Business Rules

The PCMM Business Rules provide information on how some of the PCMM fields will be handled for mental health team, team positions, and patient assignments. These rules are not intended to be all encompassing, but for general information purposes to allow some basic validation within the system to ensure data integrity.

Mental Health Patient
- A patient who has been assigned a Primary Care Provider can be assigned to a MHTC.
- A patient who has not been assigned to a Primary Care Provider can be assigned to a MHTC.
- A patient can be assigned to multiple providers within their assigned mental health team.
- A patient can be assigned to multiple mental health teams.
- A patient cannot have more than one MHTC.

Mental Health Team
- In order for a team to be designated as a mental health team, the "Mental Health Treatment" purpose needs to be selected within the Primary Care Team Profile Settings.

- A mental health team can only be designated as a non-primary care team.
- If Mental Health Treatment is selected as the purpose, the Primary Care Team checkbox will be disabled (grayed out).
- If Mental Health Treatment is selected as the purpose, the checkboxes on the Settings tab will be disabled when setting up positions for that mental health team.
- A mental health team can have an unlimited number of positons. Those positions can be occupied by any number of designated mental health roles.

Mental Health Staff
- Any staff member assigned to a MHTC Role can additionally be assigned to any non-mental health team.

MHTC Roles
- The naming convention for a designated MHTC role will display as, "<role> (MHTC)". For example, "Social Worker (MHTC)".
- The MHTC designation will display in all areas where the Role is viewed.

References

- [PCMM User Manual](#) – sections to refer to for further instruction on processes covered in this manual listed below(quick link to sections from the table of contents):
    - o   Create a New Team
    - o   Assign Positions to a Team
    - o   Assign Staff Members to a Position

    Additional sections for reference related to Mental Health (quick link to sections from the table of contents):
    - o   Assign Single Patient to Team/Position(s)
    - o   Assign Multiple Patients to Team/Position(s)
    - o   Reassign Multiple Patients to Team/Position(s)
    - o   Edit an Existing Team
- [CPRS User Guide, GUI Version](#)

Glossary

Term	Definition
CALENDAR DISPLAY	Within PCMM, when there is a date field, the user can "double click" the field and a miniature calendar will 'pop up' for selection of a date and

Term	Definition
	year. This is used for activation and deactivation dates as well as discharge dates.
CLOSING	Another term for 'inactivating' a position or team.
DIETITIAN	Performs patient care duties related to nutrition and weight management
DROP DOWN LIST	When a user selects an item from the MENU BAR, a list is displayed in a vertical format. For example, if a user selects FILE, a list drops down showing all options that are available under the main heading FILE: File, Edit, Print, Save
ENHANCEMENT	An 'enhancement' to an already existing Class I software package is the introduction of new or improved functionality.
GUI	Graphical User Interface
HIGHLIGHT	To 'Highlight' a name, team, position, or date, one would place the cursor (or arrow) on the name, team, or position they wish to choose and 'click' the mouse button to select it or highlight it.
HISTORY FILE	Although not specific to any one document, a history file is a compilation of various pieces of information pertaining to individual teams, positions, etc. for future reference and clarification.
ICON	An Icon is an image or snapshot of something that is visually understood and is represented in a 'box'. For instance, an ICON that stands for 'cutting' a piece of text out of a document would be a box with a picture of a pair of scissors in it. They are also known as 'buttons'.
LOG OFF	This is referred to logging off or signing out of a particular software package or system. To end the session, to 'get out' of a package, etc.
LOG ON	This is referred to logging on or signing onto a particular software package or system. To open or start a new session.
MH Treatment Coordinator (MHTC)	The liaison between the patient and the mental health system at a VA site. There is only one MH treatment coordinator per patient and they are the key coordinator for behavioral health services care.

For more information about the MH treatment coordinator's responsibilities, see VHA Handbook 1160.1, "Uniform Mental Health Services in VA Medical Centers and Clinics," pp. 3-4. **Note:** In the handbook, the MHTC is called the Principal Mental Health Provider. |
PCMM	Primary Care Management Module
PRIMARY CARE	Primary care is the provision of integrated, accessible health care services by clinicians that are accountable for addressing a large majority of personal health care needs.
ROLE	A function or task of a staff member involved with the implementation, maintenance and continued success of primary care.
TEAM	Teams are groups of staff members organized for a certain purpose (e.g., Primary Care, Mental Health).
TEAM PROFILE	This is a screen within PCMM that shows the various characteristics of a particular team, e.g., number of patients allowed for enrollment, name, positions assigned, etc.
TEXT BOX	The text box is also known as the DIALOGUE box as described above. It provides the user with an area in which to identify certain characteristics of a particular component of PCMM. For example, the description of what a team is for (provides primary care to patients that have been discharged from the hospital within the last 6 months).
VistA	Veterans Health Information Systems and Technology Architecture, formerly known as Decentralized Hospital Computer Program, encompasses the complete information environment at VA medical facilities.

Appendix A: Standard Position File (#403.46)

The below 54 entries are available to choose from in the Position pick-list:

ADDICTION THERAPIST
ADDICTION THERAPIST (MHTC)
ADMIN COORDINATOR
CARE MANAGER
CASE MANAGER
CHAPLAIN
CHAPLAIN (MHTC)
CLINICAL NURSE SPECIALIST
CLINICAL NURSE SPECIALIST (MHTC)
CLINICAL PHARMACIST
CLINICAL PHARMACIST (MHTC)
DESIGNATED WOMEN'S HEALTH PROVIDER
DIETITIAN
HEALTH TECHNICIAN
INTERN (PHYSICIAN)
LPC
LPC (MHTC)
MAS CLERK
MEDICAL STUDENT
MFT
MFT (MHTC)
NURSE (LPN)
NURSE (RN)
NURSE (RN) (MHTC)
NURSE PRACTITIONER
NURSE PRACTITIONER (MHTC)
OCCUPATIONAL THERAPIST
OCCUPATIONAL THERAPIST (MHTC)
OIF OEF CLINICAL CASE MANAGER
OIF OEF PROGRAM MANAGER
OIF OEF TRANSITION PATIENT ADV
OTHER
PATIENT SERVICES ASSISTANT
PEER SUPPORT STAFF
PHYSICIAN ASSISTANT
PHYSICIAN ASSISTANT (MHTC)
PHYSICIAN-ATTENDING

PHYSICIAN-PRIMARY CARE
PHYSICIAN-PSYCHIATRIST
PHYSICIAN-PSYCHIATRIST (MHTC)
PHYSICIAN-SUBSPECIALTY
PSYCHOLOGIST
PSYCHOLOGIST (MHTC)
RECREATION THERAPIST
RECREATION THERAPIST (MHTC)
REHAB/PSYCH TECHNICIAN
REHAB/PSYCH TECHNICIAN (MHTC)
RESIDENT (PHYSICIAN)
SOCIAL WORKER
SOCIAL WORKER (MHTC)
TEAM PHARMACIST
TRAINEE
VOC REHAB SPEC/COUNSELOR
VOC REHAB SPEC/COUNSELOR (MHTC)