

Uniform Assessment System for New York



Adult Behavioral Health Managed Care's Transition from the Community Mental Health Pilot Application to the UAS-NY Support for Users

v 2018-04-24



**Department
of Health**

**Medicaid
Redesign Team**

Office of Health Insurance Programs

Division of Program Development and Management

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THE PURPOSE OF THIS GUIDE

The purpose of this guide is to provide you with the step-by-step information necessary to successfully transition from the UA-Community Mental Health (CMH) Pilot application to the UAS-NY to conduct the New York State Eligibility Assessment (EA) and/or to access associated data beginning on June 2, 2018. It also explains the training requirements associated with the transition that users must complete to access the UAS-NY after the transition.

The Adult Behavioral Health Managed Care transition involves two software applications:

- **UAS-NY**– a secure, web-based software application housed in the New York State (NYS) Department of Health’s (DOH) Health Commerce System (HCS). The UAS-NY contains electronic adult and pediatric assessments for individuals being served in several New York State programs under the oversight of various NYS Agencies.

The UAS-NY also includes a seamlessly integrated online, self-paced Training Environment, which includes training on conducting the EA, managing your organization’s case list and accessing reports, as well as using the UAS-NY application.

- **UA-Community Mental Health Pilot application** –also housed in the HCS, where Health Home Care Management users currently conduct the EA and Health Home Programs and Managed Care HARPs and SNPs access associated data.

You are strongly encouraged to read this document in its entirety before calling the UAS-NY help line for support.

If you need assistance with any of the information or procedures presented in this document, please refer to the following:

- your supervisor,
- your organization’s Health Commerce System (HCS) Coordinator, or
- your organization’s Information Technology (IT) department.

SUPPORTED WEB BROWSERS

A web browser is a software application used to access information resources on the World Wide Web. Internet Explorer, Mozilla Firefox, and Chrome are some of the more popular web browsers currently used.

The UAS-NY has been verified to work with the following web browsers. These are the only browsers supported by the UAS-NY Support Team.

Internet Explorer version 10

Internet Explorer version 11

Mozilla Firefox (current)

Chrome (current)

Edge

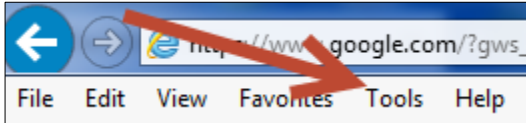
Click your browser's Help menu and select **About** to determine the browser version you are using. If you are not sure which browser you are using, contact your organization's IT support.

BROWSER POP-UP SETTINGS

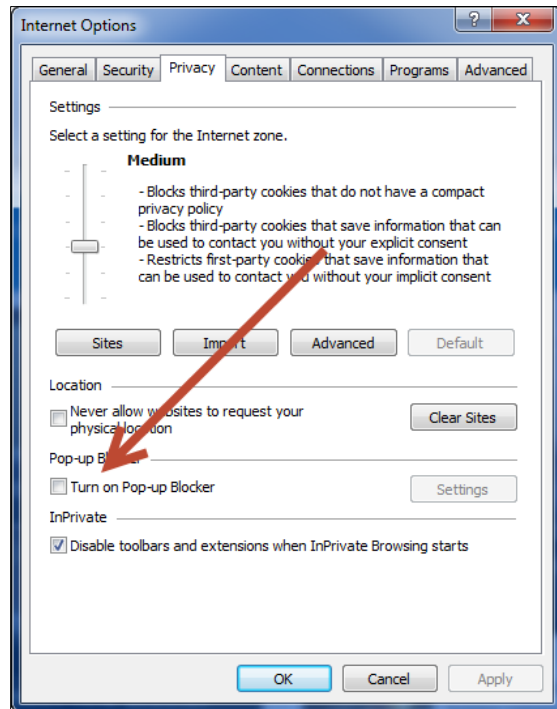
Your web browser must be set to allow new windows to pop-up, either as new windows or new tabs. The following procedures explain how to turn off pop-up blocker capabilities in your browser.

Internet Explorer

1. Select the Internet Options from the Tools* drop down menu (often located in the upper left browser window).

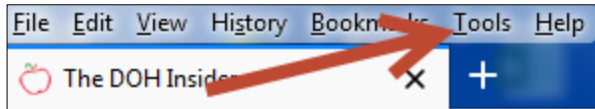


2. Select the Privacy tab.
3. Make sure the option to block pop-up windows is NOT checked.
4. Click OK.

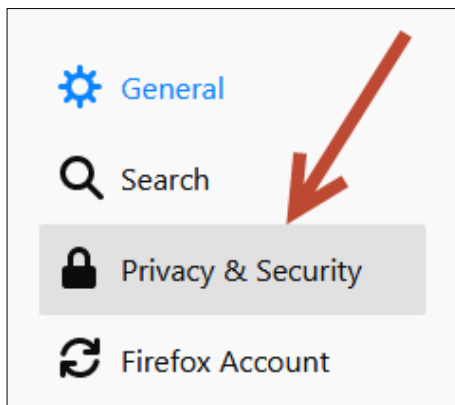


Firefox

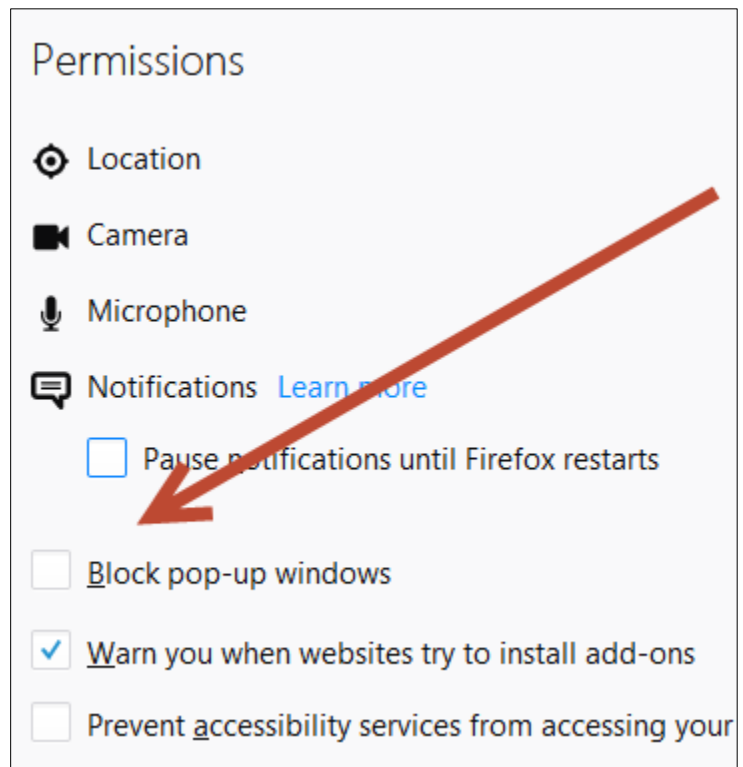
1. Select Options from the Tools* drop down menu (often located in the upper left browser window).



2. Select Privacy and Security.

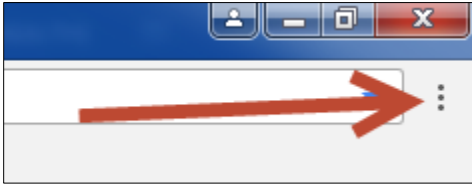


3. Make sure the option to block pop-up windows is NOT checked.

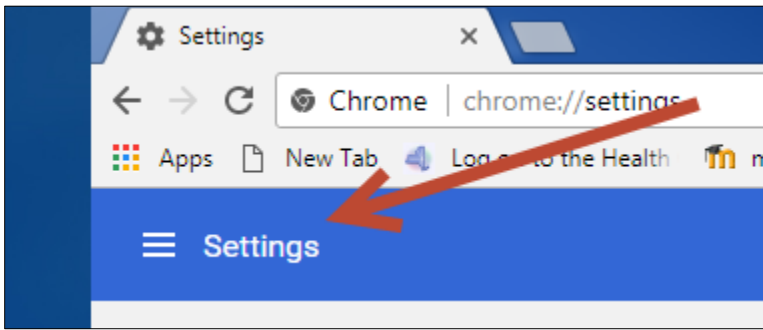


Chrome

1. Select Settings from the Chrome menu (three dots symbol to the right of search bar).



2. Select Settings (top left corner of browser)



3. Click Advanced -> Privacy and Security -> Content settings -> Pop-ups



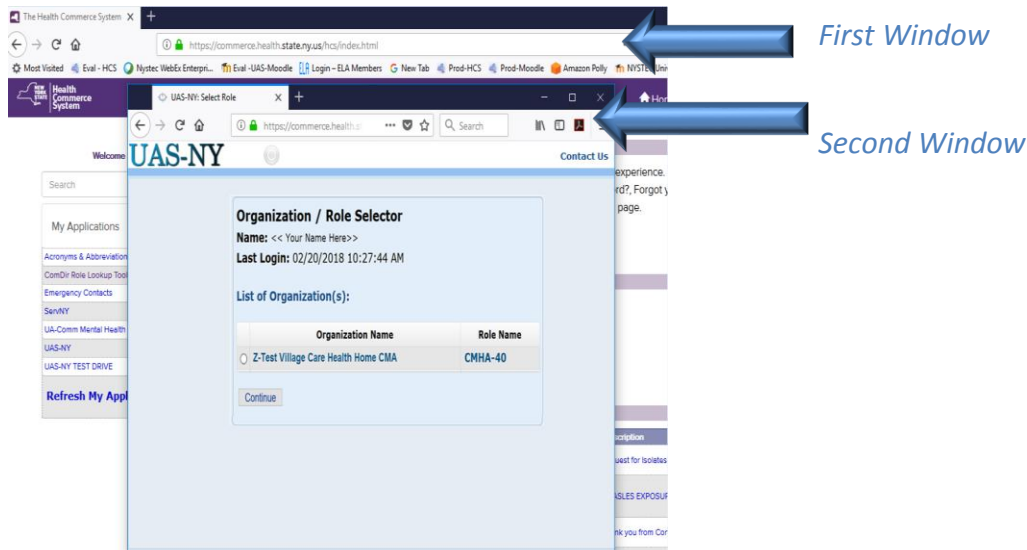
4. Make sure Pop-ups are allowed.

***If you cannot see or control the Tools menus, contact your organization's IT support.**

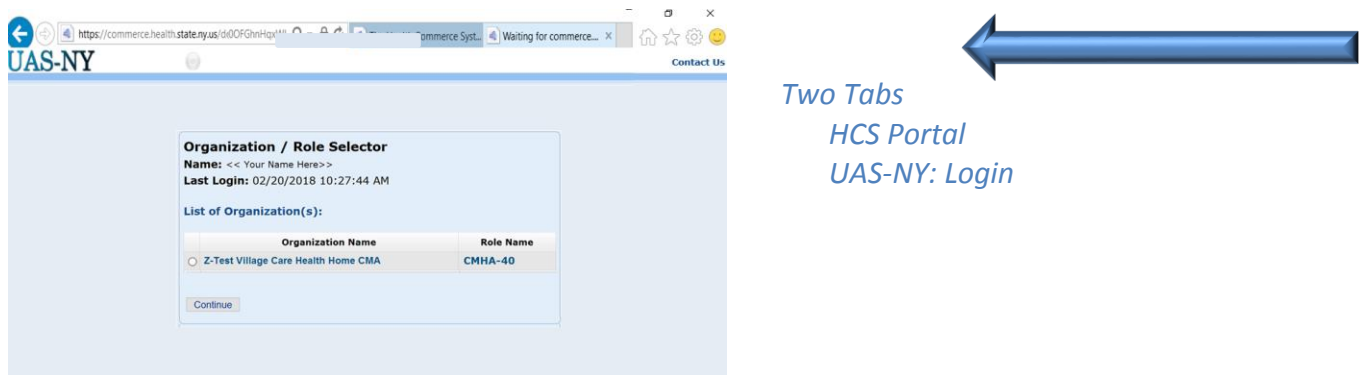
BROWSER TABS AND NEW WINDOWS

Internet Explorer has the option to open certain links in new windows or new tabs.

If your browser is set to open these links in new windows, when you click those links a new window will open with the web page displayed. If your browser is set to open certain links in new windows, then when you launch the UAS-NY it will look like this:



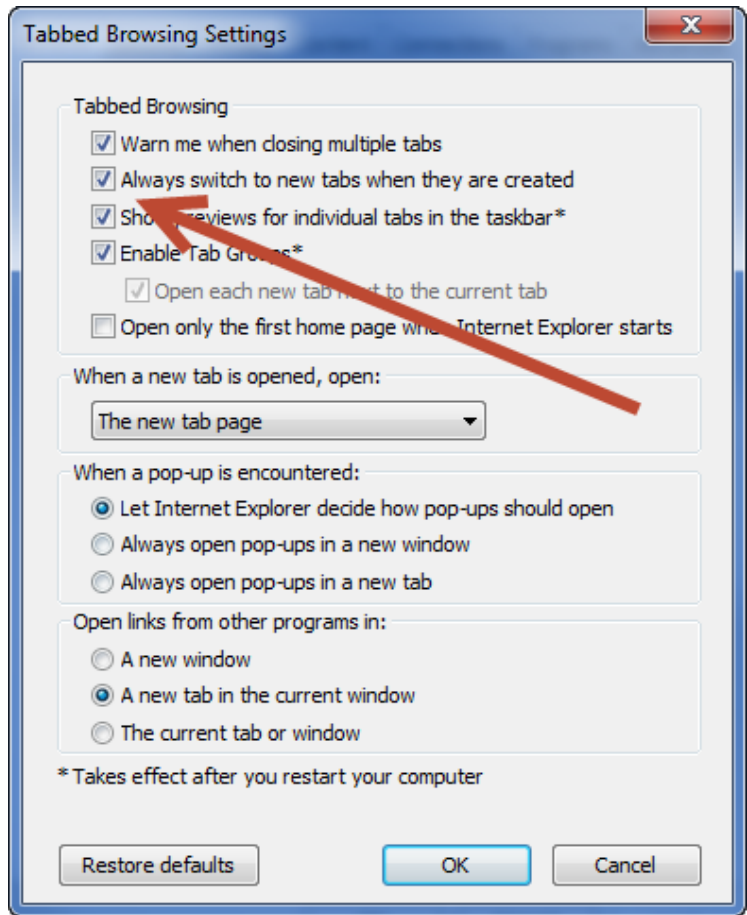
If your browser is set to open these links in new tabs, when you click those links a new tab will open in the same window with the web page displayed. If your browser is set to open certain links in new tabs, then when you launch the UAS-NY it will look like this:



If you set your browser to open certain links in new tabs instead of new windows, you will also need to set the browser to switch to those newly opened tabs immediately. The following procedures explain how to switch to new tabs immediately in your browser settings.

Internet Explorer

1. Select the Internet Options from the Tools menu.
2. Select the General tab.
3. In the Tabs section, select Settings.
4. Make sure the option to Always switch to new tabs when they are created is checked.
5. Click OK.



ACCESSING THE UAS-NY

Effective June 2, 2018, all adult behavioral health users will be accessing the EA and associated data in the UAS-NY. Each user who requires access to the UAS-NY must have:

- An individual HCS user account,
- Trust level 3 assurance verified on your HCS account,
- MFA set-up for your HCS account
- An appropriate **New CMHA** role assigned to your HCS account.

ACCESSING THE UAS-NY TRAINING ENVIRONMENT

All adult behavioral health users that currently have an OMHCMH-01 and/or OMHCMH-02 role should have completed all required courses in their course sequence to access the EA and associated data in the UA-CMH Pilot application.

To support the transition from the Pilot application to the UAS-NY, the DOH has created **New CMHA** user roles to access the UAS-NY.

CMHA Role Name	Generally Intended For	Available To
CMHA-15	Administrative Support Staff: build and maintain organization's case list and run reports to support organization's business processes.	Health Home CMA
CMHA-40	Assessors: add, conduct and finalize an EA.	Health Home CMA
CMHA-45	Assessor Supervisors: conduct an EA and review and manage assessments conducted by other staff and generate reports for their organization.	Health Home CMA
CMHA-50	Managers: review assessments, workflow and run administrative reports for their organization.	Health Home CMA
CMHA-70	Staff responsible for building and maintaining your organization's case list and running reports for your organization.	Health Home Programs, MC HARPs and SNPs

NEW ROLE ASSIGNMENTS

Currently, you are provisioned either the OMHCMH-01 or OMHCMH-02 and that is the role you see when logging into the UAS-NY Training Environment and the UA-Community Mental Health Pilot application. If you work for a Health Home CMA and are provisioned an OMHCMH-01, your Health Home CMA HCS Coordinator will provision you a CMHA-40 (Assessor) role.

If you work for a Health Home CMA and are provisioned the OMHCMH-02, your Health Home CMA HCS Coordinator will provision you either a CMHA-50 if you do not conduct assessments (Manager/Supervisor) role **OR** a CMHA-45 if you are a supervisor that also conducts the Eligibility Assessment.

If you work for a Health Home Program (lead Health Home) or a Managed Care HARP or SNP, and you are provisioned the OMHCMH-02, your organization's HCS Coordinator will provision your HCS account with a CMHA-70 role.

Dates and Milestones Adult Behavioral Health UAS-NY Users Should Know

1. All Health Home CMA, Health Home Program and Managed Care HARP and SNP staff must have an appropriate **CMHA** role provisioned to their HCS account to access the UAS-NY Training Environment effective May 9, 2018. If by this date you do not have a **New CMHA** role assignment, you should speak with your organization's HCS Coordinator.

It is important to understand that on May 9th, there will be a new required course sequence available for Adult Behavioral Health users. This new sequence will include the courses that were part of the sequence you completed to use the Community Mental Health Pilot application using either your OMHCMH-01 or OMHCMH-02 role, as well **new courses** specific to the UAS-NY and your **New CMHA** role assignment.

2. On Tuesday, May 8, 2018 at 5:00 PM, the UAS-NY Training Environment will be taken offline. At that time, all courses that you completed, in their entirety, using your OMHCMH-01 or OMHCMH-02 role, will be transferred as completed to your **New CMHA** role assignment.
3. To receive transfer credit for course 1500-EA Understanding the Eligibility Assessment Interim, you must have completed this course by close of business May 8, 2018. If only partially complete, there will be NO credit applied- NO EXCEPTIONS! If you have started but not completed 1500-EA Understanding the Eligibility Assessment Interim, it behooves you to complete it before close of business May 8th!

If you have not completed 1500-EA Understanding the Eligibility Assessment Interim by close of business May 8, 2018 (5:00 PM), you will have to complete the New 1500 EA Understanding the Eligibility Assessment in its entirety.

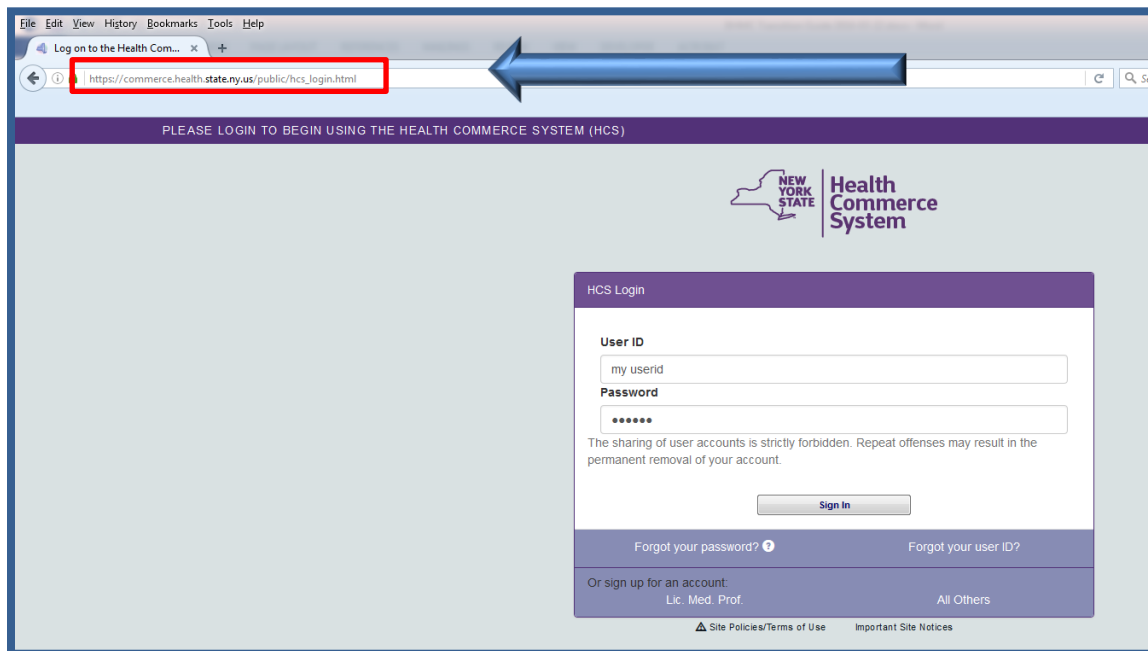
4. It is important to note that the UAS-NY Training Environment will not be available to all users from Friday, May 11th 5:00 PM through Monday, May 14th at 8:00 AM to accommodate an upgrade of the UAS-NY application.
5. The transition from the UA-CMH Pilot to the UAS-NY will occur on Saturday, June 2nd. The UAS-NY application will be taken offline (unavailable) at 8:00 AM and will be brought back online at approximately Noon. At this point, the transition will be complete and staff assigned a **CMHA** role will have access to the UAS-NY application to begin building your organization's case list, conducting the EA and accessing associated data.

6. All assessments conducted in the UA-CMH Pilot application must be signed and locked by close of business Friday, June 1, 2018. Only signed and locked assessments will be transitioned from the UA-CMH Pilot application to the UAS-NY. Any assessment not signed and locked by close of business (5:00 PM) on Friday, June 1st will have to be initiated and conducted again in the UAS-NY.
7. You will not be able to access the UAS-NY until after noon on June 2, 2018 even if you complete the required courses associated with your **New CMHA** role before that date. If you try to access the UAS-NY prior to June 2nd, you will receive an error message indicating that the transition from the UA-CMH Pilot application to the UAS-NY has not yet occurred.
8. Effective June 2, 2018, if you still have either a OMHCMH-01 or OMHCMH-02 role provisioned to your HCS account, you will continue to have access to the UA-CMH Pilot application **READ ONLY** mode until August 31, 2018.

Location of the Health Commerce System (HCS)

You can reach the HCS by opening a web browser and entering this address:

<https://commerce.health.state.ny.us>

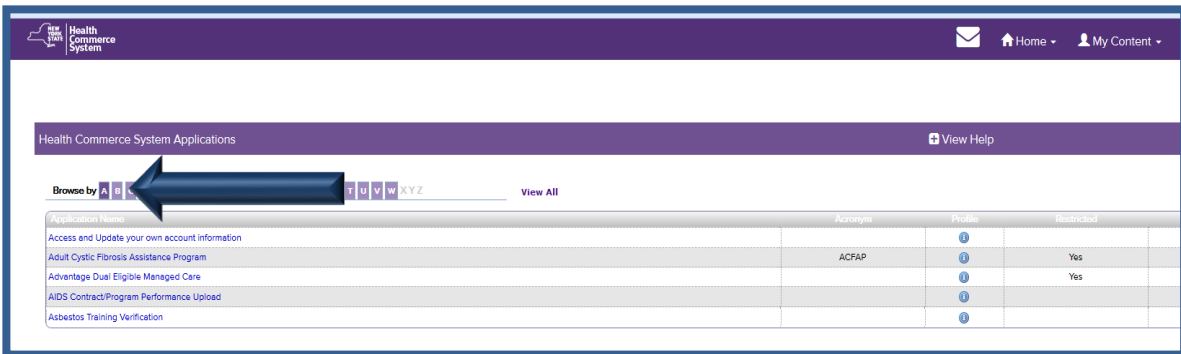


Locating the UAS-NY Application in the HCS

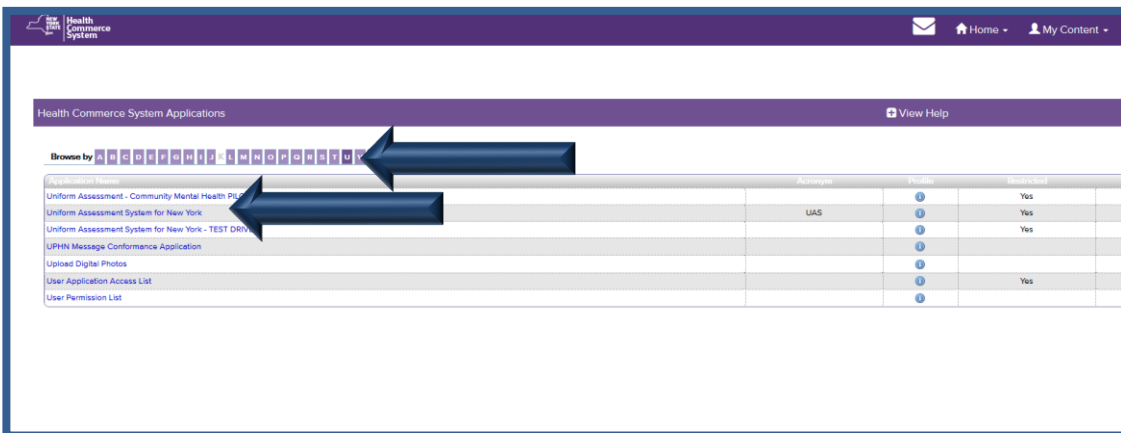
- Once you have logged into the HCS, follow these instructions to locate the UAS-NY application. Click to drop down the My Content menu. Then, click All Applications.



A list of HCS applications will display with an alphabet navigation near the top of the screen. Applications starting with the letter A will be displayed.




- Click on the letter U, for all the applications that start with the letter U.



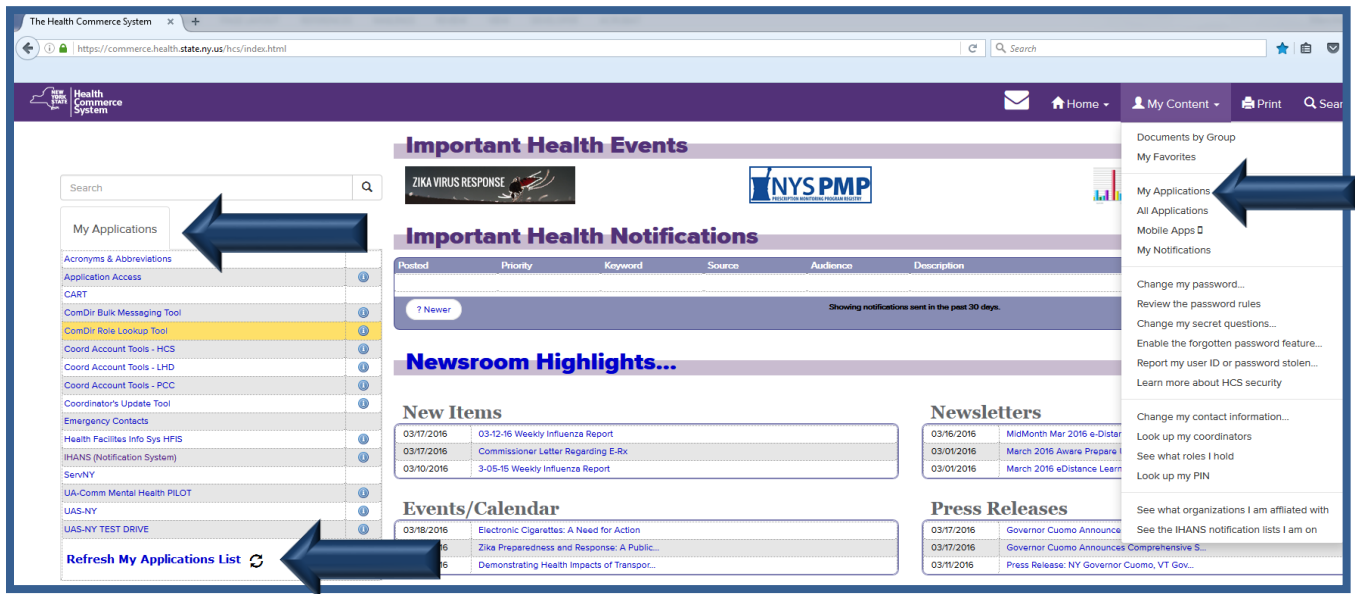
- Click on Uniform Assessment System for New York (a link) and a separate window will now open-up and contain the UAS-NY application.

If a new window or tab does not open-up with the UAS-NY application displayed in it, see the section **Browser Pop-up Settings** on page 3 of this guide.

Note: The Information icon in the Profile column () will display information about the UAS-NY application, but is not the application itself. Make sure you click on the name of the application, as the arrow indicates. ‘Restricted’ is a generic description. You will *not* be restricted if your HCS Coordinator has assigned a role and trust level 3 assurance. Click the green plus sign to place a convenient link in ‘My Applications’ on the left.

Customizing “My Applications” Menu

You will see links to the UAS-NY by way of *My Applications*. You may have to click Refresh My Applications List once in order to view the UAS-NY links here in the future.



Error Messages When Starting the UAS-NY

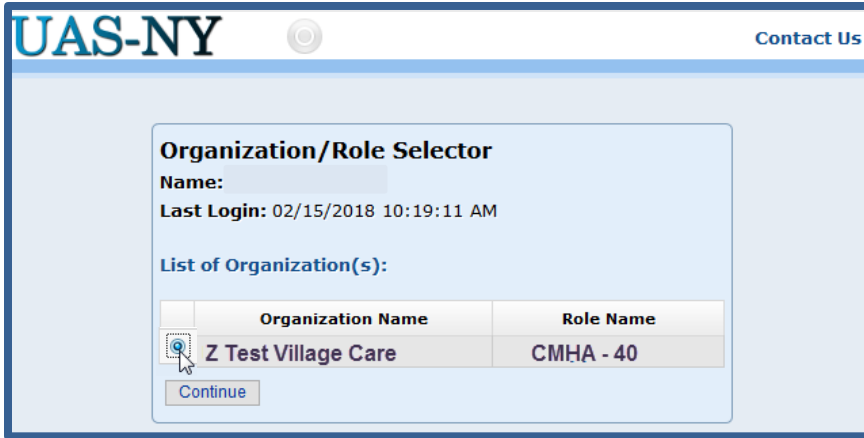
The two most common error messages you *may* receive when starting the UAS-NY application are:

- **Unexpected Error: No roles are configured**
This error occurs if your HCS account does not have a CMHA role assigned to it. Notify your HCS Coordinator.
- **You do not have the appropriate Trust Level**
This error occurs if your HCS account has not been verified to Trust Level 3 assurance. Notify your HCS Coordinator.

How to Get into Training

To access the UAS-NY Training Environment, and enter a specific course, follow these instructions.

1. Log into the HCS and start the UAS-NY application.
2. When prompted, indicate the role you will be using, and click Continue.




UAS-NY Contact Us

Organization/Role Selector
Name: [Redacted]
Last Login: 02/15/2018 10:19:11 AM

List of Organization(s):

Organization Name	Role Name
<input checked="" type="radio"/> Z Test Village Care	CMHA - 40

If you have only one role, you will be brought directly to screen shot presented in #4 on the next page.

If you have more than one role, click the radio button  to select the organization and role to be brought to your course selection page.

3. If you conduct the Eligibility Assessment for a Health Home CMA other than TSI, and you come to your Organization/Role Selector page and you see a CMHA-SCA role, this means you were provisioned the CMHA-SCA 40 role inappropriately. You should notify your HCS Coordinator, so that it can be removed.



Organization / Role Selector
Name: << Your Name Here >>
Last Login: 02/20/2018 10:27:44 AM

List of Organization(s):

Organization Name	Role Name
<input checked="" type="radio"/> Z-Test Village Care Health Home CMA	CMHA-40
<input type="radio"/> Z-Test Village Care Health Home CMA	CMHA-SCA-40

4. At the role confirmation page, you will be presented with a list of courses that are specific to the role you selected. Simply click on the link for the course you wish to take. A new window or tab will open and you will see the Topic Outline.

The first course you should take, if not already completed, is 1000 UAS-NY Training Environment. It will teach you how to navigate the Training Environment.

Organizations/Roles Confirmation
Name: <<Your Name Here >>
Organization: <<Your Organization Here >>
Role Name: CMHA-40

Training Courses for role CMHA-40

Required Courses

Course Name	Status
1000 UAS-NY Training Environment	
1010 UAS-NY Security	Not Completed
1025-ALL Working with Demographic Information	Not Completed
1100-EA The Eligibility Interface	Not Completed
1200-Managing Your Organization's Case List	Not Completed
1300-BH Conducting a Behavioral Health Assessment	Not Completed
1500-EA Understanding the Eligibility Assessment	Not Completed

Recommended Courses

1740 - EA Individual Reports in the Eligibility Assessment	Not Completed
8100-CMH Instruments and Reference Manuals	Not Completed

The image below shows the training environment, specifically indicating the Course 1000 UAS-NY Training Environment.

Topic outline

Welcome to the UAS-NY Training Environment course! This course will take approximately **20 minutes** to complete.

We have created a series of courses that will enable you to immediately understand and use the UAS-NY. Each course covers a specific topic which will enable you to quickly identify what you need to learn, complete the course, and begin using the UAS-NY.

There are some unique features of the UAS-NY Training Environment that you will need to know to make accessing and completing the courses easier. The purpose of this course is to prepare you to effectively use the UAS-NY Training Environment.

Upon completion of this course, you will be able to:

- describe the structure of the UAS-NY Training Environment
- demonstrate the ability to navigate the UAS-NY Training Environment
- identify and apply personal strategies to complete online courses
- have confidence to successfully use the training environment
- take charge of your learning

Remember. If you have any questions contact the **UAS-NY Support Desk** at 518-408-1021. Staff is available Monday through Friday 8:30-12 & 1-4. You may also email us at uasny@health.ny.gov

Important Note: DO NOT use the video play bar to navigate the training video.

- Scores and activity completion will not be recorded
- You will have to repeat the activity

Let us begin by clicking on the Activity 1 link below:

- 🎥 Activity 1. UAS-NY Training Environment (Watch)
- 📖 Activity 2. UAS-NY Training Environment Quick Reference Guide (Read)
- 📝 Activity 3. UAS-NY Training Environment Quiz (Take)
- 📌 Confirm Course Completion

USING THE UAS-NY TRAINING ENVIRONMENT

Once you log in to the UAS-NY Training Environment the first time, you will automatically be registered and enrolled in all training that has been assigned to your role. The UAS-NY Training Environment will keep track of all the courses you complete and will keep track of your progress in the courses. This will enable you to complete a course over a period of days rather than in one session.

What You Need to Take Courses in the UAS-NY Training Environment

You will need the following items to participate in the UAS-NY training:

- a computer with speakers or headphones
- internet access
- Adobe Flash Player installed and enabled on the computer — available *for free* from this website: <http://get.adobe.com/flashplayer/>
- This link will help determine if Flash is installed and enabled: <http://helpx.adobe.com/flash-player.html>

Work with your organization's IT support if you suspect hardware or software issues.

ACCESSING THE UA-CMH PILOT APPLICATION

It is important to remember, all assessments in the UA-CMH Pilot application must be signed and locked by close of business, June 1, 2018. Only signed and locked assessments will be migrated to the UAS-NY on June 2, 2018.

Additionally, as previously stated, effective June 2, 2018, if you still have either a OMHCMH-01 or OMHCMH-02 role provisioned to your HCS account, you will continue to have access to the UA-CMH Pilot application **READ ONLY** mode until August 31, 2018.

- Open-up your internet browser and in the URL field enter:

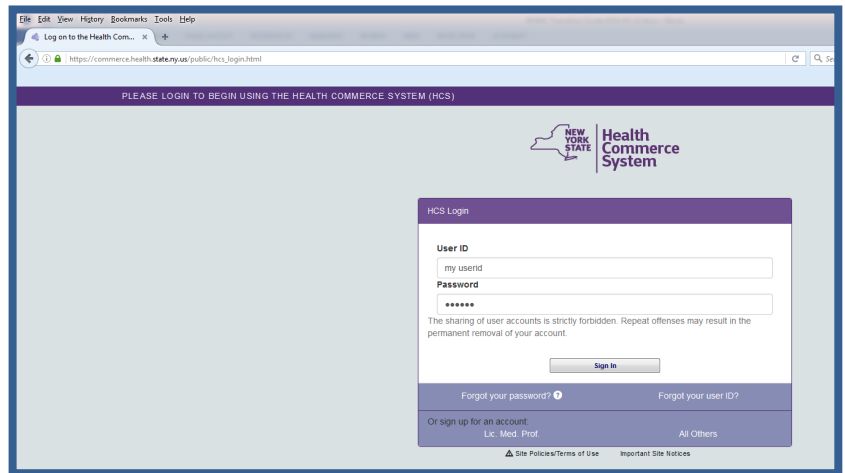
<https://commerce.health.state.ny.us>

This will bring you to the login page

Note: https

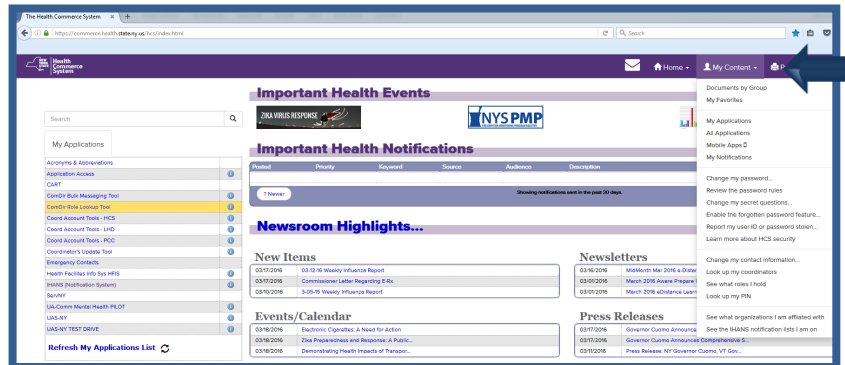
At the login page, enter your HCS username and password

You will be directed to the HCS Portal after logging in



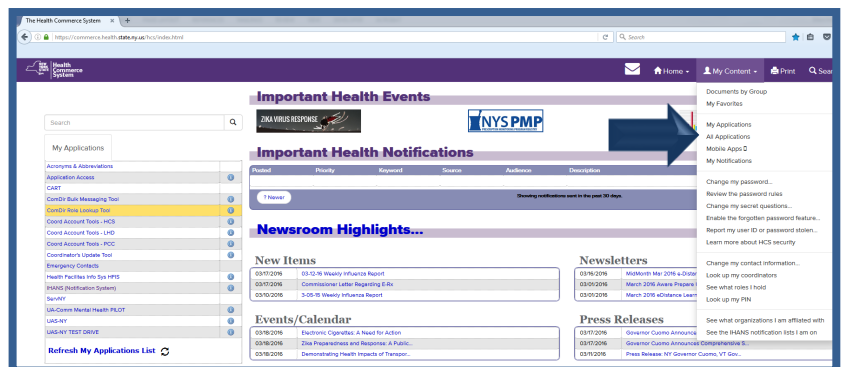
The HCS Portal provides a variety of resources. To learn about the HCS:

- Select “My Content”
- Select “Documents by Group”
- Select “Getting Started”
- Select “Training”
- Select “HCS Portal My Applications Quick Reference Card”



- To access the UA-CMH Pilot:

- select “My Content”
- Select “All Applications”



A list of HCS applications will display with an alphabet navigation displayed near the top of the screen

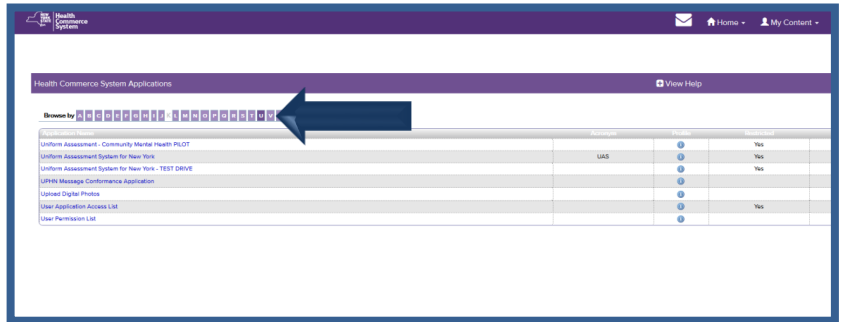
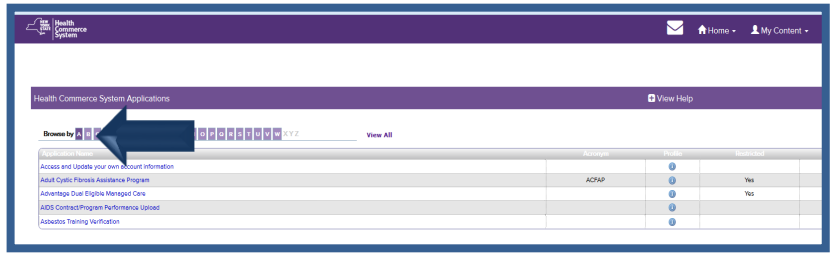
Applications starting with the letter A will be displayed.

- Click on the letter U

A list of HCS applications beginning with U will be displayed

- Click on Uniform Assessment – Community Mental Health Pilot

A separate window will now open-up and contain the UA-CMH Pilot application



UAS-NY SUPPORT DESK

If, after following all the procedures described in this document, you need assistance using the UAS-NY, please contact the UAS-NY Support Desk during normal business hours Monday through Friday. The UAS-NY Support Desk can be reached at the following:

via email: uasny@health.ny.gov
telephone: 518-408-1021(option 1)

Transition and Implementation Support

To assist your organization's transition efforts, the project team offers the following support options:

- **Transition Support and User Support**

Available for UA-CMH Single Point of Contacts should they have questions about or need information relevant to their organization's transition to and implementation of the UAS-NY. The UAS-NY support desk can be reached at the following:

via email: uasny@health.ny.gov
telephone: 518-408-1021

- **Programmatic Questions**

Available to users should they have policy and regulatory-related questions about the Behavioral Health Managed Care Transition. Users may contact:

via email: UA-CMH@omh.ny.gov