IBHRS Cutover Instructions

The IBHRS Cutover Guidance outlines the activities necessary for the transition between IBHRS reporting methods and/or Provider entities. This document outlines the steps to be taken, and the timeline of those steps to ensure a successful transition to submitting required data to IBHRS.

Please note the guidance provided in this document are general in nature and providers that are anticipating a change under the following use scenarios contact SAPGData@idph.iowa.gov and request technical assistance from the Department to discuss/create a IBHRS data reporting transition plan.

Four Use Cases:
- XML to Data Entry
- Data Entry to XML
- XML to XML: Transitioning to a New Electronic Health Record (EHR)
- Provider Licensure Change (In coordination with and approval of IDPH Licensure team)
    - Ownership/New License Number
    - Merger – one provider absorbed under another provider

All transitions will require re-certification for IBHRS. This should be accomplished prior to the transition whenever possible.

XML to Data Entry

- The ACTIVE Client, Treatment Episode and Service Event datasets will be accessible through the IBHRS Data Entry Screens.
    - Users may make updates, add new records (Provider Client, Treatment Episode, Service Event) by using the features available via the IBHRS Data Entry Screens.

Notes:
- *The guidance assumes that an EHR is no longer being used to collect and report data to IBHRS. An EHR may still be in use though by the Provider. Please remember that Source Record Identifiers (SRIs) should be preserved within an individual Treatment Episode that was open at the cutover.*
- *There is not a need to discharge clients within IBHRS as part of the transition to reporting via IBHRS Data Entry Screens.*

Data Entry to XML

- Complete a Discharge Care Status via the IBHRS Data Entry screens for active treatment episodes in IBHRS (as of the cut-over date) using the last date of service before the cut-over date as the **Discharge Date** and **Last Contact Date**. Upon completion of the Discharge Care Status, enter the Close Date for the Treatment Episode.
    - **Discharge Reason = Transferred to another treatment program or facility**
- Submit via XML an IBHRS Provider Client record for each client that was discharged and returns for treatment on or after the cutover date.

- Submit via XML a new Treatment Episode for each client that was discharged and returns for treatment on or after the cutover date.
    - **Open Date** = date client returns for service (and an encounter is to be reported for this date) which is on/after cutover date
    - **Care Status** = Admission
    - **Care Status Date = Open Date**

Notes
- *In the case where the provider has been collecting IBHRS data within their EHR, and has been using EHR generated SRIs as for IBHRS Data Entry, then the provider may be able to transition directly to XML reporting. Please contact SAPGData@idph.iowa.gov to request technical assistance and create a transition plan with the Department.*
- *For new clients that are seen for the first time on/after the cut-over date, the provider will submit IBHRS Provider Client, Treatment Episode and Service Event datasets to IBHRS through the XML File Upload process.*
- *Please remember to insert the EHR prefix (three alpha characters) for each dataset entity source record identifier (SRI).*

XML to XML: New EHR

- Submit via XML a Discharge Care Status for active treatment episodes in IBHRS (as of the cut-over date) using the last date of service before the cut-over date as the **Discharge Date** and **Last Contact Date**. Upon completion of the Discharge Care Status, enter the Close Date for the Treatment Episode.
    - **Discharge Reason = Transferred to another treatment program or facility**
- Submit via XML from the new source system an IBHRS Provider Client record for each client that was discharged and returns for treatment on or after the cutover date.

- Submit via XML from the new source system a new Treatment Episode for each client that was discharged and returns for treatment on or after the cutover date.
    - **Open Date** = date client returns for service (and an encounter is to be reported for this date) which is on/after cutover date
    - **Care Status** = Admission
    - **Care Status Date = Open Date**

Notes
- *For new clients that are seen for the first time on/after the cut-over date, the provider will submit via the IBHRS XML upload process from the new source system an IBHRS Provider Client, Treatment Episode and Service Event datasets.*
- *Please remember to insert the EHR prefix (three alpha characters) for each dataset entity source record identifier (SRI). This prefix can be obtained from the Department.*

Provider Licensure Change

For instances where a provider may undergo a change in ownership, or merge with another licensed provider, technical assistance can be provided to determine the appropriate IBHRS Cutover options. Please contact SAPGData@idph.iowa.gov to request technical assistance.