



FEI Systems

# Iowa Behavioral Health Reporting System (IBHRS)

## End User Guide

Date Submitted

July 1, 2021

Version 1

# Table of Contents

<b>Revision History .....</b>	<b>ii</b>
<b>Acronym Table.....</b>	<b>iii</b>
<b>1 Introduction.....</b>	<b>iv</b>
<b>2 Integrated Treatment (SUD/PG) Reporting.....</b>	<b>5</b>
2.1 Accessing IBHRS Reporting Module.....	5
2.2 XML File Submissions .....	6
2.2.1 Job Processing Steps and Error Types.....	6
2.2.2 XML File Naming and File Size .....	7
2.2.3 Submit XML Files via IBHRS Reporting Module .....	7
2.2.4 Review Uploaded Files.....	10
2.2.5 View Jobs via Portal .....	10
2.2.6 Jobs Workspace.....	11
2.2.7 How to Correct Job Errors.....	13
2.2.8 Vocabulary Mapping .....	14
2.2.9 Download Data.....	16
2.3 Data Entry.....	17
2.3.1 Enter Provider Client Data.....	19
2.3.2 Enter Provider Treatment Data.....	23
2.3.3 Enter Service Event Data .....	28
<b>3 IPN Claims – H837 Process.....</b>	<b>33</b>
3.1 Upload Instructions.....	33
3.2 999 Acknowledgment for Health Care Insurance .....	36
3.3 835 Health Care Claim Payment/Advice .....	37
<b>4 Reports .....</b>	<b>38</b>
4.1 Run Reports.....	38
4.1.1 How to run a report.....	39
4.1.2 Additional Notes .....	43
<b>5 User/Staff Management.....</b>	<b>44</b>
5.1 Overview .....	44
5.2 Troubleshooting Help for Staff Management .....	46
5.2.1 Use Case: Account in Use .....	46
5.2.2 Use Case: Reset Credentials Link Expired.....	48
5.2.3 Use Case: Reset TOTP.....	50

# Revision History

Version	Date	Author(s)	Revision Description
1	2/3/2021	Val Hewitt, Kory Schnoor	Initial draft
2	4/30/2021	Val Hewitt, Kory Schnoor	Updated UI
3	6/7/2021	Val Hewitt, Kory Schnoor	Updated Data Entry
4	6/30/21	FEI, IDPH	Finalize Draft

## Acronym Table

The following table includes acronyms used within IBHRS, and specifically this Training Document.

Acronym	Meaning
IDPH	Iowa Department of Public Health
IBHRS	Iowa Behavioral Health Reporting System
MH	Mental Health
PHI	Protected Health Information
SUD	Substance Use Disorder
SSAS	SQL Server Analysis Services
SSRS	SQL Server Reporting Services
SE	A Submitting Entity is a provider organization (or "Agency" as used within I-SMART)
URL	Uniform Resource Locator
XML	Extensible Markup Language

# 1 Introduction

The Iowa Behavioral Health Reporting System (IBHRS) is the integrated data reporting system for substance use disorder (SUD) and problem gambling (PG) treatment data for licensed SUD and PG treatment providers. IBHRS completes the integration of SUD/PG treatment licensure standards and data reporting requirements set in motion by Senate File 2425 (2008) and House File 811 (2009), where the Iowa Legislature directed the Iowa Department of Public Health (IDPH) to align SUD and PG treatment systems. IBHRS replaces the Central Data Repository (CDR) and Iowa Service Management and Reporting Tool (I-SMART) data systems.

The IBHRS Training Documentation includes detailed step-by-step instructions on how to utilize each functional area of the system. This document is organized by functional area and is designed so that users may easily reference the sections important to their roles within the system.

**This document is sectioned into the following IBHRS Modules:**

- Integrated Treatment (SUD/PG) Reporting
- H837 Claim Submission (IPN Only)
- Staff Administration (for IBHRS Agency Administrators)

**The document will be updated in a future version for:**

- Grant Management
- OTP Registry
- Statewide Waitlist

## 2 Integrated Treatment (SUD/PG) Reporting

### PURPOSE

IDPH collects treatment level data from licensed SUD/PG treatment providers to meet state and federal data (TEDS, etc.) reporting requirements. IDPH uses data to assist in decision making for system/network improvements, provider service delivery (access, engagement, retention, and completion of treatment), and linkages to associated services and support.

Providers may choose one of the two options for reporting each required Integrated Treatment (SUD/PG) data set as defined within the **IBHRS Submission Guide**, available at <https://idph.iowa.gov/Bureau-of-Substance-Abuse/Substance-Use-and-Problem-Gambling-Data/Iowa-Behavioral-Health-Reporting-System/IBHRS-Documentation>.

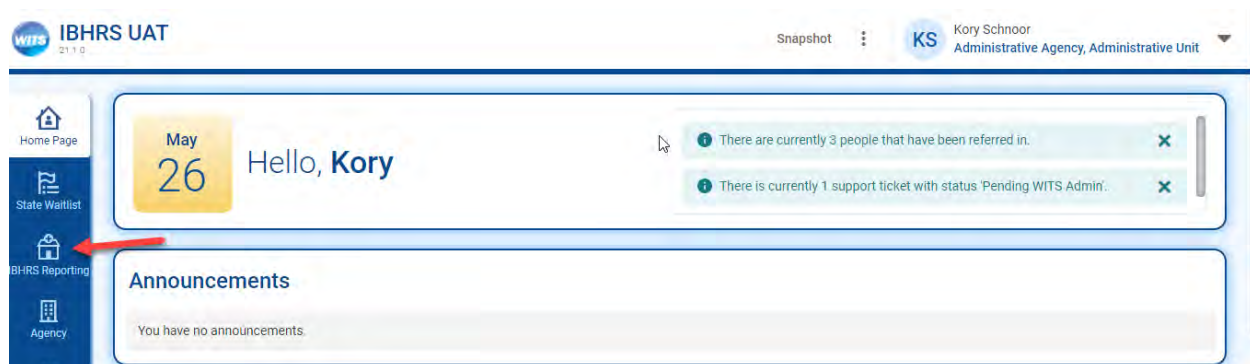
- A data entry option for those providers that either do not have an electronic health record or choose to report data manually via a data entry screen; or
- XML file upload for providers with electronic health records that support creation of XML files.

**Providers are required to submit data and pass all IBHRS validation checks by the 15th of each month for the previous month's data.** For example, data for April are due May 15th and data for May are due June 15th, and so on. Providers are encouraged to have a regular reporting and monitoring process. Some providers may find that submitting data more frequently than monthly may reduce the number of validation errors and improve the provider's data integrity. For providers submitting data via XML, it is recommended that data are submitted at least weekly to minimize errors and huge gaps in data submission.

### 2.1 Accessing IBHRS Reporting Module

Providers (i.e., Submitting Entities) may login to the IBHRS web-based portal and, based on their assigned roles, may access the Submission and/or Data Entry tabs.

1. Users with access to the IBHRS Reporting module will see the **IBHRS Reporting** menu item when they log into IBHRS.



2. Clicking on IBHRS Reporting will open a new browser tab for this module.

**Important** – Ensure your browser allows pop ups for this site.

NAME	SUBMITTER	USER	DATE	STATUS	SUCCESSFUL	ERRORS	WARNINGS
ClientDataSet_ValidExample	Demo Provider 6	kory.schnoor	04/01/2021 10:32 AM	COMPLETE	7	0	0
TreatmentEpisodeDataSet_ValidExample	Demo Provider 6	kory.schnoor	04/01/2021 10:32 AM	COMPLETE	30	1	0
ServiceEventDataSet_ValidExample	Demo Provider 6	kory.schnoor	04/01/2021 10:32 AM	COMPLETE	4	0	1

## 2.2 XML File Submissions

**This section is for providers reporting via XML files.**

IBHRS creates and processes jobs for each file uploaded through the IBHRS Reporting module. Files are processed according to a standard pipeline of events, such as verifying the submitter (Submitting Entity), validating the file, and then processing the file appropriately depending on the type of file.

The Submission screen displays a list of each job and users can view additional details for each job by downloading a report (available in PDF and Excel formats), or by clicking an individual job to open the Job Workspace screen within IBHRS.

Errors associated with each job are stored within the IBHRS database. Detailed error information and applicable messages are included in downloadable report files, and displayed on the Job Workspace screen.

NAME	SUBMITTER	USER	DATE	STATUS	SUCCESSFUL	ERRORS	WARNINGS
TreatmentEpisodeDataSet_ValidTreatmentEpisodeExample_Shared	FEI Test Submitter	jnab	04/07/2021 08:49 AM	COMPLETE	0	1	0

### 2.2.1 Job Processing Steps and Error Types

Job processing steps may vary based on the data set type associated with each job. For more information, see the **IBHRS Submission Guide** at <https://idph.iowa.gov/Bureau-of-Substance-Abuse/Substance-Use-and-Problem-Gambling-Data/Iowa-Behavioral-Health-Reporting-System/IBHRS-Documentation>.

#### Types of Job Processing Steps:

- File Name Validation
- Data Set Access Check
- XML Schema Validation
- Business Rule Validation
- Data Type Validation
- Data Linking

**Error Types:**

- Business Rule
- Warning
- Data link
- Invalid Vocabulary Code
- Schema validation
- Type Validation
- Related Entity

## 2.2.2 XML File Naming and File Size

Although submitters have some flexibility in how files are to be named, all filenames submitted to IBHRS must adhere to the below 3 requirements:

1. The name of the data set must be the first word in the file, followed by an underscore.
2. The filename must be unique in the submitters set of currently uploaded and unprocessed files.
3. The file must end with “.xml”. For current datasets, only .xml files will be accepted.

**i Note:** The required file name for each data set can be found in the respective section within the IBHRS Submission Guide.

To satisfy the naming requirement, it is suggested to append the date and time to each file after the underscore, using the **YYYYMMDDHHMMSS** format.

Some example acceptable filenames would be:

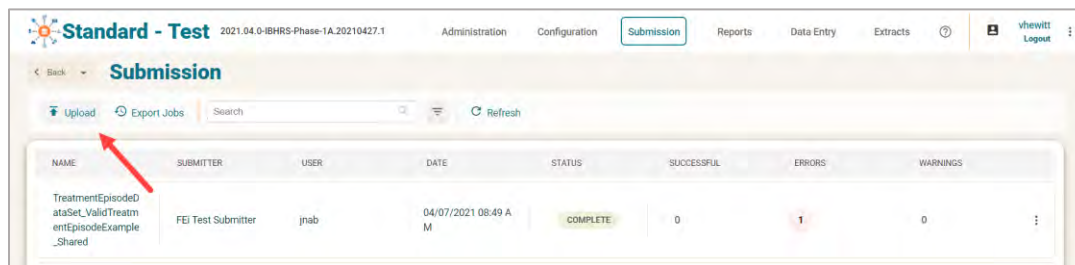
- ProviderDataSet\_20180215083045.xml
- ClientDataSet\_20180215083045.xml
- ClientDataSet\_20180222091530.xml

Any filename that does not meet this requirement will not be processed into IBHRS.

IBHRS will accept any data file that is 50mb or less in size.

## 2.2.3 Submit XML Files via IBHRS Reporting Module

1. On the Submission screen, click **Upload**. This will open the Upload window.



2. On the Upload window, there are **two (2) options** available to upload data files. Choose either option and then continue to **Step 4**.

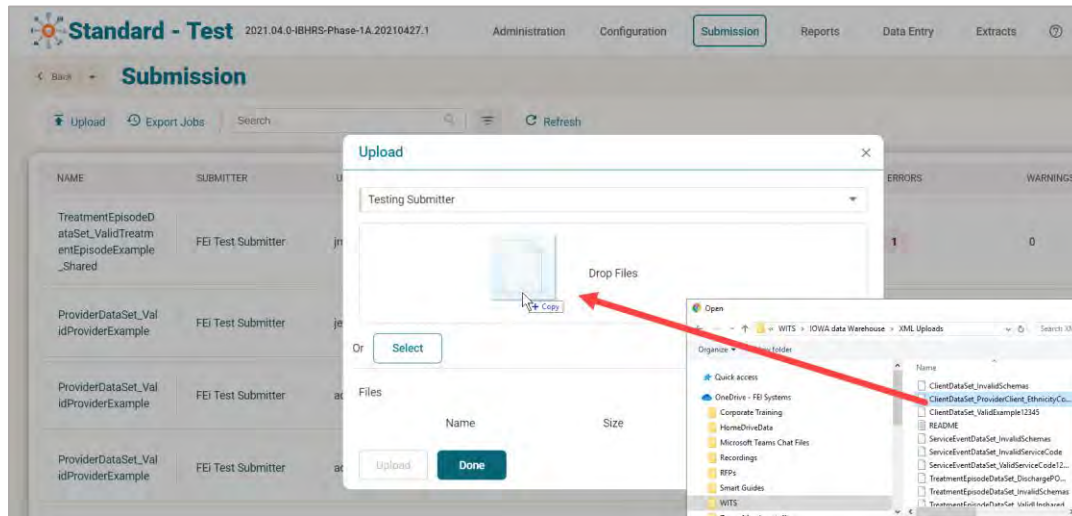
### 2.2.3.1 Option 1: Drop Files

- a. Open your computer's file explorer, or other location where files are stored.
- b. In your file explorer, or other location, select one or more files, and then drag the file(s) to the "Drop Files" section on the Upload window.



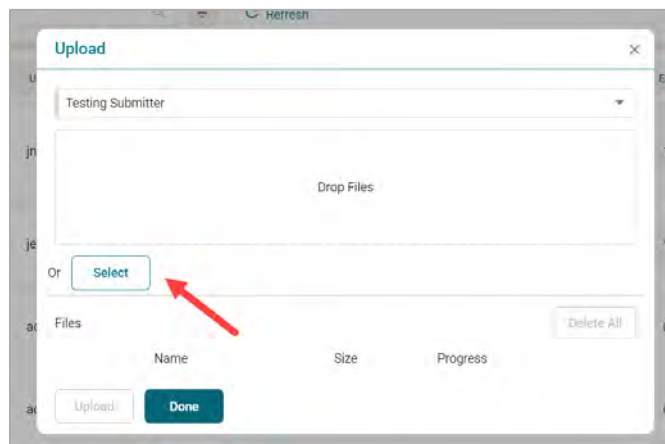
**i** **Tip:** To select multiple files, press the **Ctrl** key and click each file.

c. Continue to **Step 4**.

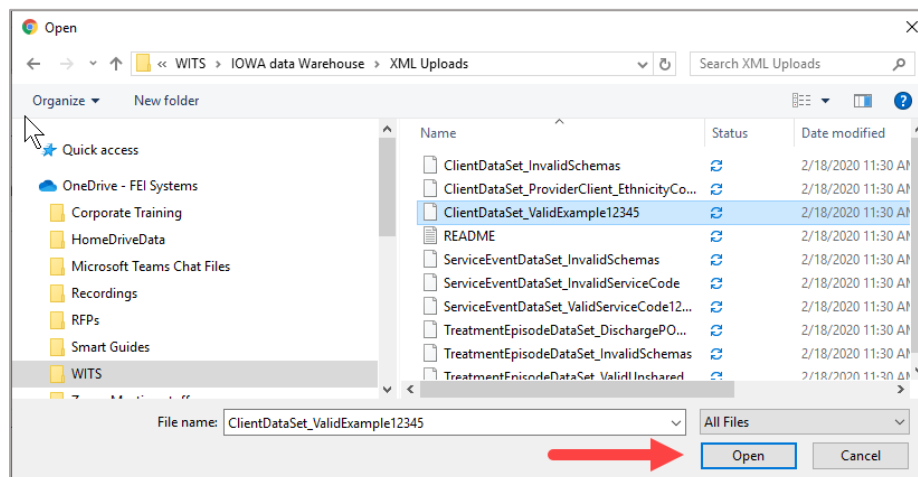


### 2.2.3.2 Option 2: Select Files

a. On the Upload window, click **Select** to open file explorer and search for your file(s).

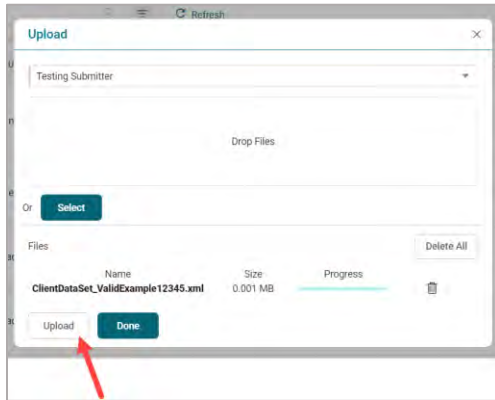


b. Select your file(s) and click **Open**.




**i** **Tip:** To select multiple files, press the **Ctrl** key and click each file.

- When your selected files are displayed in the Files section, click **Upload**. This will initiate the Job to begin processing the file(s).



**i** **Tip:** The **Progress** bar indicates the file's upload progress.

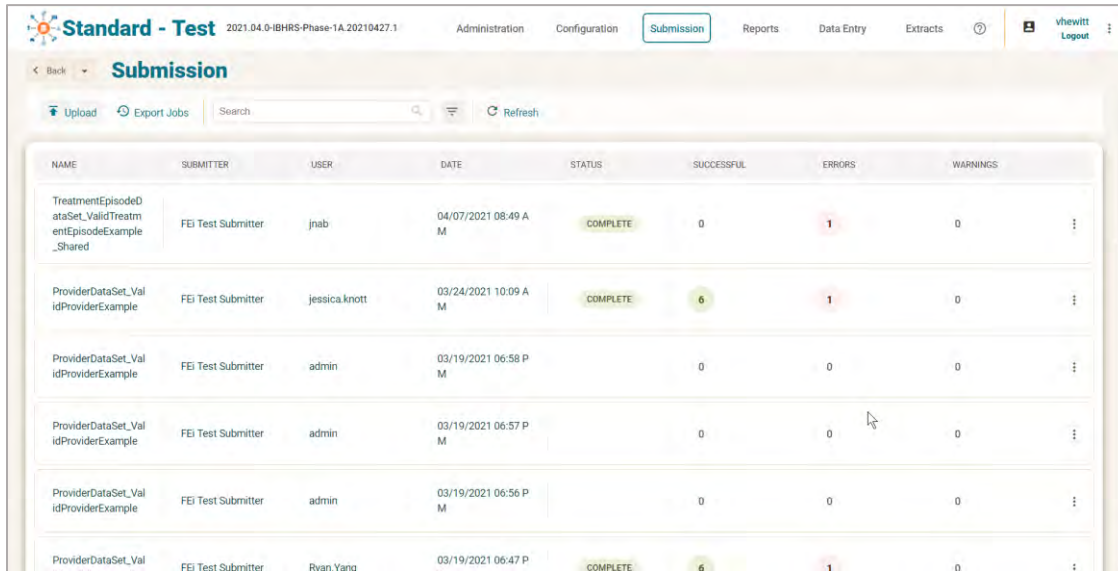
Name	Size	Progress	
ClientDataSet_ValidExample12345.xml	0.001 MB	<div style="width: 50%;"></div>	

- Once all submission files have been uploaded, click **Done**. This will close the Upload window.



## 2.2.4 Review Uploaded Files

1. After uploading your data file(s), review the **Jobs** list to make sure your file name(s) are displayed.

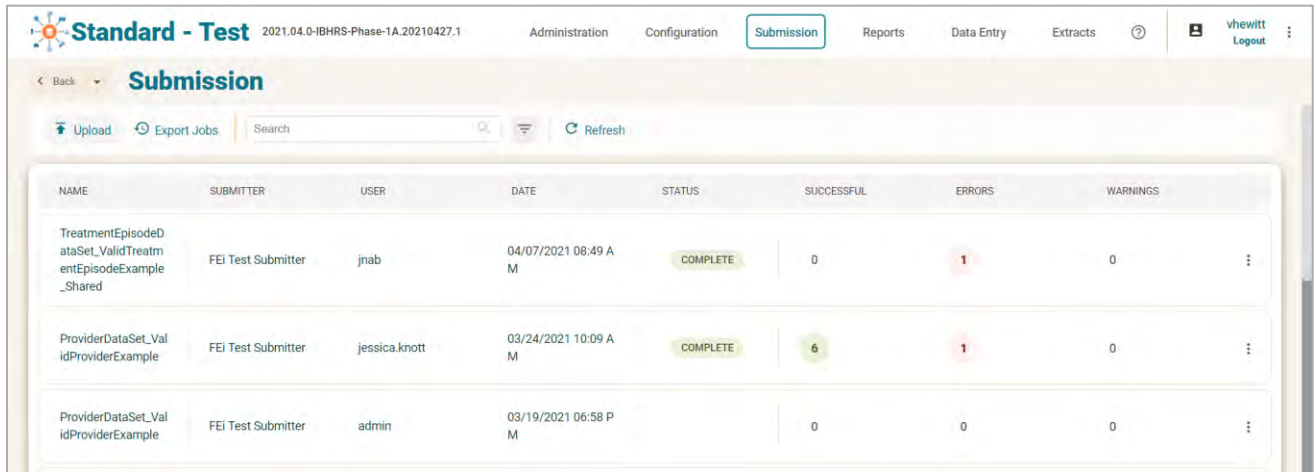


2. Continue to upload files as needed.
3. After all files are uploaded, check the Error statuses for each file submitted.

## 2.2.5 View Jobs via Portal

Once files have been uploaded to the IBHRS Portal, those jobs are displayed on the Submission screen.

On the Submission screen, users can sort the uploaded Jobs by clicking each column header: Name, Submitter, User, Date, Status, Successful, Errors and Warnings. Users can also use the search bar to locate a specific job and click the refresh button to view any newly processed jobs.



The following table provides a description of each column displayed in the Jobs tile.

Column	Description
Name	Displays the file name of the file uploaded.
Submitter	Displays the name of the Submitting Entity associated with the uploaded file.
User	Displays the name of the user who uploaded the file.

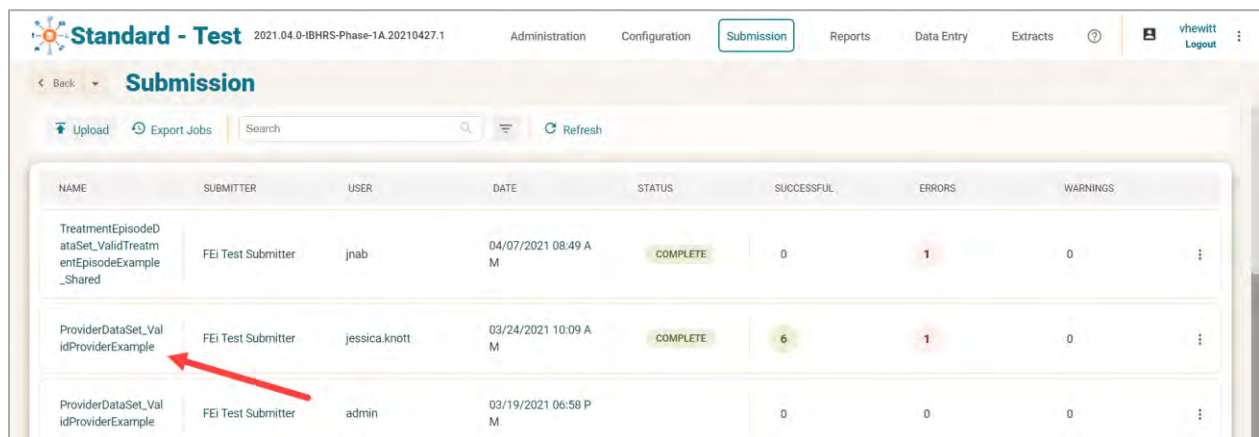
Column	Description
Date	Displays the date and time when the file was uploaded.
Status	Displays the status of the file uploaded. The status will change as the job is processing.
Successful	Displays the number of successful records within the Job.
Errors	Displays the number of errors associated within the Job. Errors will prevent data from entering IBHRS. The errors must be corrected and the file will need to be reprocessed.
Warnings	Displays the number of warnings associated with the Job.

The following Job Processing Statuses allow the user to know the status of all jobs:

- When a job begins processing, an **“Initialized”** status will display in the Portal.
- When a job is processing, a **“Running”** status will display in the Portal.
- When a job finishes processing, a **“Complete”** status will display in the Portal.

Follow the steps below to view detailed information about each Job:

1. On the **Submission** screen, in the Jobs tile, locate the desired job from the list.
2. Click the **Name** of the job to access detailed information. This will open the Jobs Workspace screen.

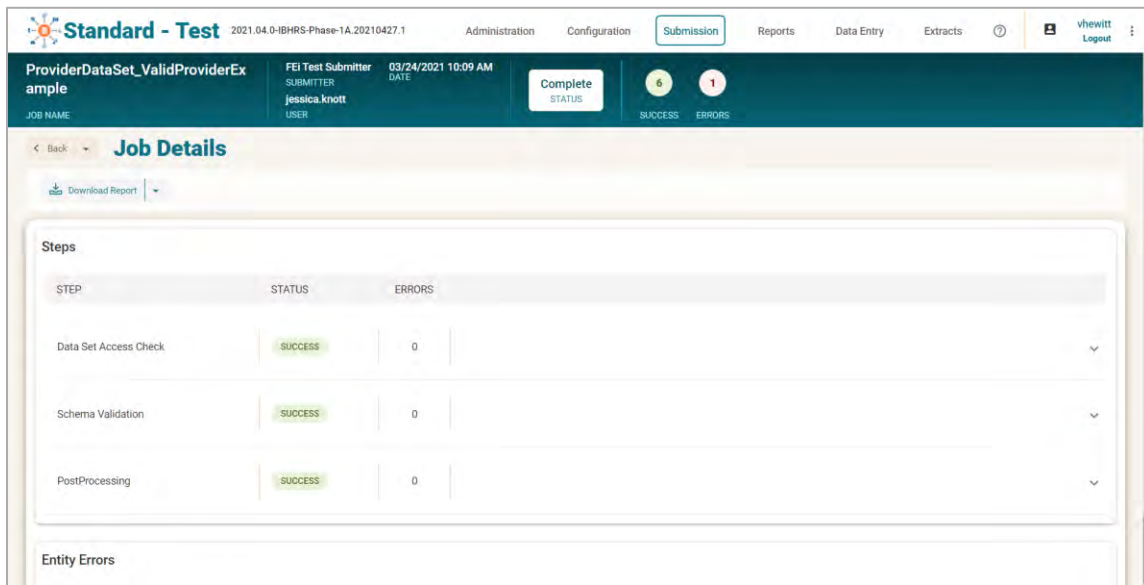


NAME	SUBMITTER	USER	DATE	STATUS	SUCCESSFUL	ERRORS	WARNINGS
TreatmentEpisodeD ataSet_ValidTreatm entEpisodeExample _Shared	FEI Test Submitter	jnab	04/07/2021 08:49 A M	COMPLETE	0	1	0
ProviderDataSet_Val idProviderExample	FEI Test Submitter	jessica.knott	03/24/2021 10:09 A M	COMPLETE	6	1	0
ProviderDataSet_Val idProviderExample	FEI Test Submitter	admin	03/19/2021 06:58 P M		0	0	0

## 2.2.6 Jobs Workspace

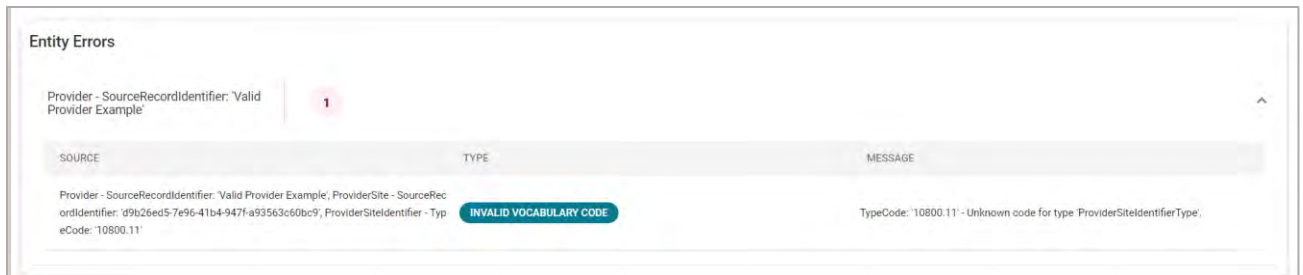
The Job Workspace displays detailed information about each job, including Job Name, Submitter (Submitting Entity), User, Date, Status, Successful (# of successful records), Errors (# of error records), Warnings (# of warning records), Job Steps (name, status, progress), and Job Errors (error type, error message, status, error reference information).

This detailed information can also be downloaded as a PDF or Excel file by clicking **Reports** on the Jobs Workspace.



Expand the entity errors/warning rows to view details for each error, including information about the entity involved. Errors are organized in a list with sortable columns displaying the **Source**, **Type**, and **Message**.

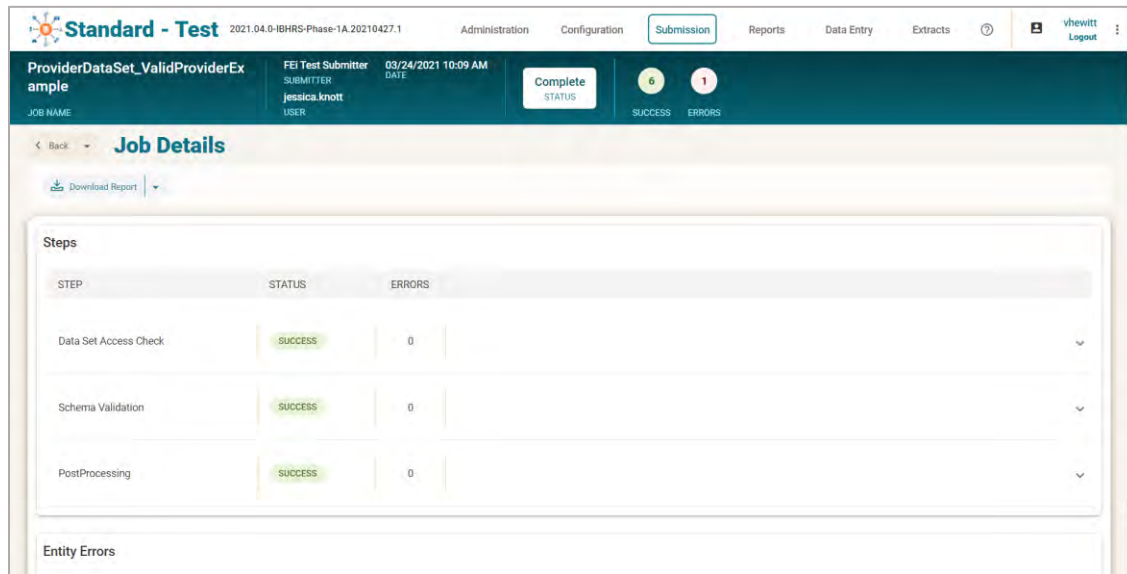
Column	Description
Source	Includes the entity name, and field names associated.
Type	Indicates the type of error.
Message	Messages can include the entity name, relevant field names, a description of the error, and the key information to associate the error to the correct record in the file.



## 2.2.7 How to Correct Job Errors

Follow the steps below to view and correct errors from the Jobs Workspace screen.

1. To identify the cause of an error, click the **Step**. This will expand the step to show additional information.

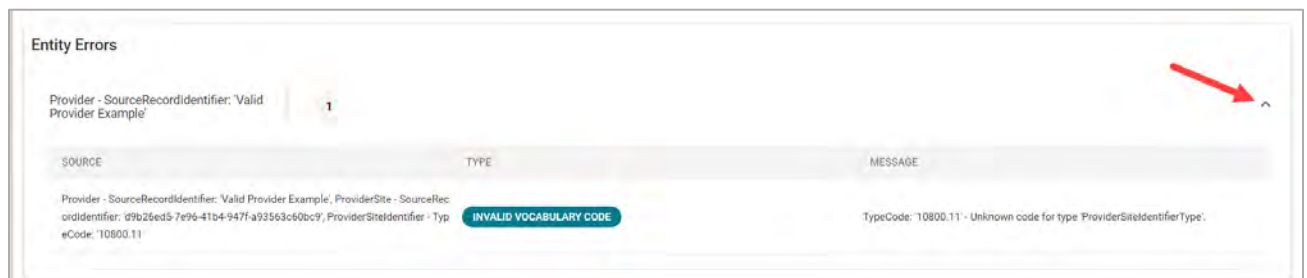


The screenshot shows the 'Job Details' page for a job named 'ProviderDataSet\_ValidProviderExample'. The job status is 'Complete'. The 'Steps' table is as follows:

STEP	STATUS	ERRORS
Data Set Access Check	SUCCESS	0
Schema Validation	SUCCESS	0
PostProcessing	SUCCESS	0

Below the steps table, there is an 'Entity Errors' section which is currently collapsed.

2. When the Step is expanded, review the **Source**, **Type**, and **Message** to identify the cause of the Error. Once the Error has been identified, use the information in the IBHRS Submission Guide on the [IBHRS website](#) to resolve the issue.



The screenshot shows the 'Entity Errors' section expanded. It displays the following error details:

Provider - SourceRecordIdentifier: 'Valid Provider Example' 1

SOURCE	TYPE	MESSAGE
Provider - SourceRecordIdentifier: 'Valid Provider Example', ProviderSite - SourceRecordIdentifier: '99b26ed5-7e96-41b4-947f-a93563c60bc9', ProviderSiteIdentifier - TypeCode: '10800.11'	INVALID VOCABULARY CODE	TypeCode: '10800.11' - Unknown code for type 'ProviderSiteIdentifierType'.

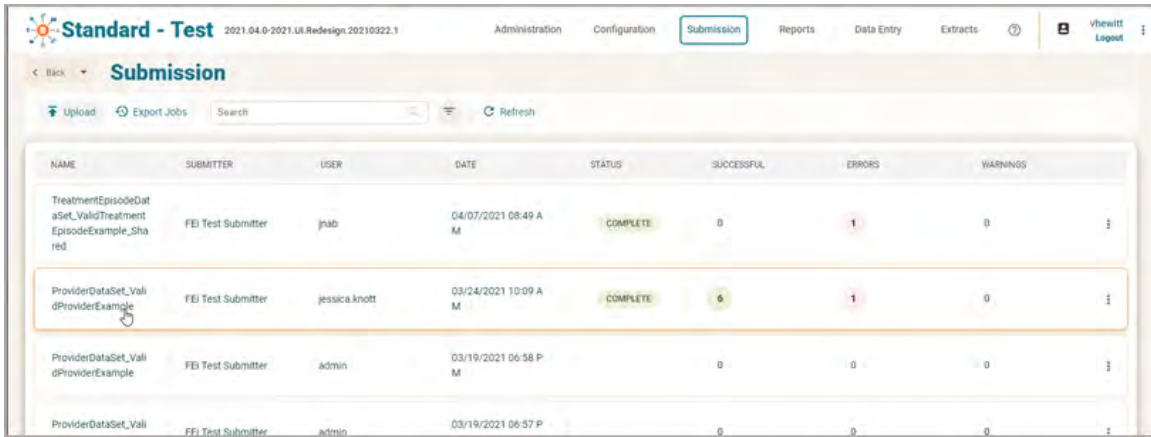
A red arrow points to the expand/collapse icon in the top right corner of the error details box.

3. Once the issue is fixed within the source system, resubmit the file.
4. Repeat the steps above to confirm all errors have been corrected.

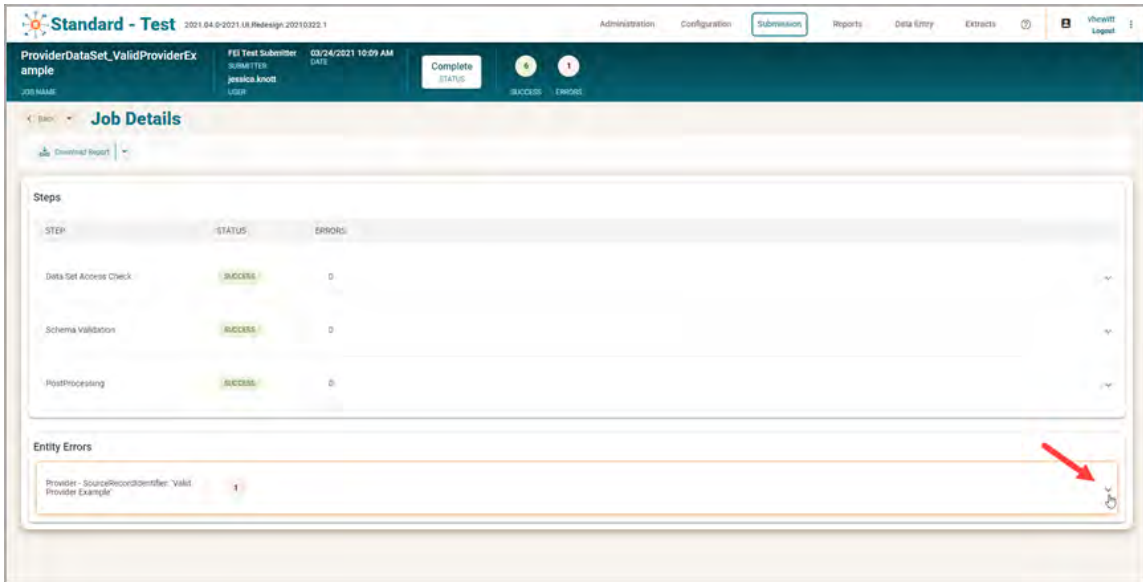
## 2.2.8 Vocabulary Mapping

If errors are found with vocabulary mapping, follow these steps to map the vocabulary.

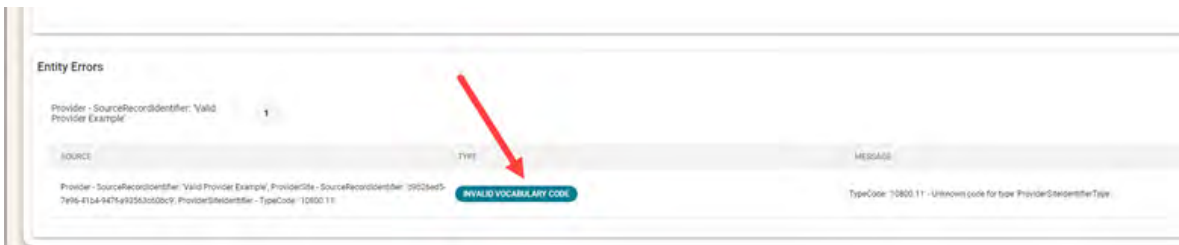
1. After submitting a file that shows errors, click on the file to open the job and review the errors.



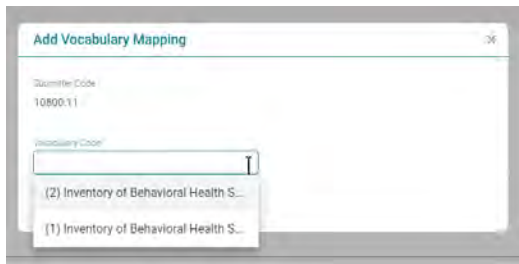
2. Click on the Entity Error row to expand the row to see more detail.



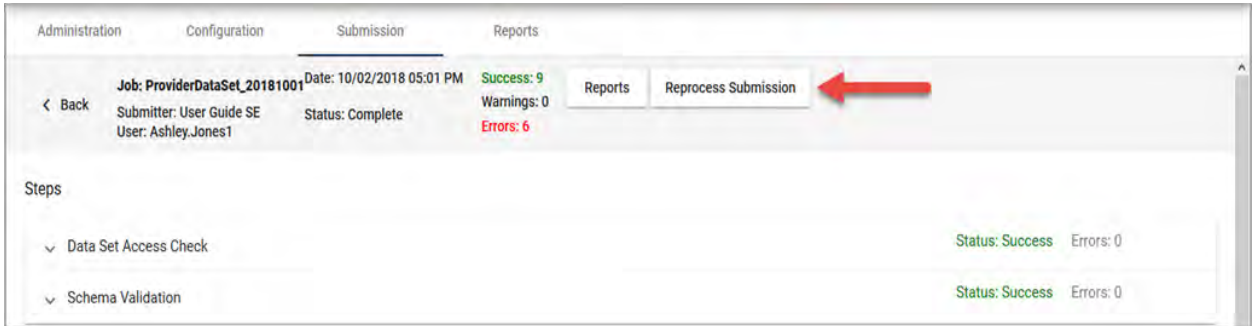
3. With the Entity Errors expanded, note the hyperlink with the Error Type of Invalid Vocabulary Code. Click on the hyperlink to view the invalid code and map it to the correct IBHRS code.



4. The Add Vocabulary Mapping window will open and will display the Submitter Code along with a drop-down menu showing the potential IBHRS codes for the file submission. In this example, the Submitter Code is 'M' and can be mapped to any of the four options in the drop-down (see below). Select the correct IBHRS Code that the Submitter Code should map to and then click **Add**.



- 5. To finalize the process, click **"Add"**, and then **"Reprocess Submission"**.





## 2.2.9 Download Data

Information about each Job can be downloaded as a PDF file or Excel spreadsheet.

The screenshot shows the 'Submission' page in the Standard - Test application. The page includes a navigation bar with 'Administration', 'Configuration', 'Submission', 'Reports', 'Data Entry', and 'Extracts'. Below the navigation bar, there are buttons for 'Upload', 'Export Jobs', a search field, and a 'Refresh' button. The main content is a table with columns: NAME, SUBMITTER, USER, DATE, STATUS, SUCCESSFUL, ERRORS, and WARNINGS. Three rows of submission data are visible. A dropdown menu is open over the second row, showing options for 'PDF' and 'Excel', and a 'Download Report' button.

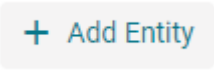
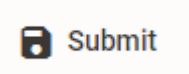


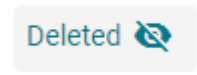

NAME	SUBMITTER	USER	DATE	STATUS	SUCCESSFUL	ERRORS	WARNINGS
TreatmentEpisodeDataSet_ValidTreatmentEpisodeExample_Shared	FEI Test Submitter	jnab	04/07/2021 08:49 AM	COMPLETE	0	1	0
ProviderDataSet_ValidProviderExample	FEI Test Submitter	jessica.knott	03/24/2021 10:09 AM	COMPLETE	6	1	0
ProviderDataSet_ValidProviderExample	FEI Test Submitter	admin	03/19/2021 06:58 PM		0		0

## 2.3 Data Entry

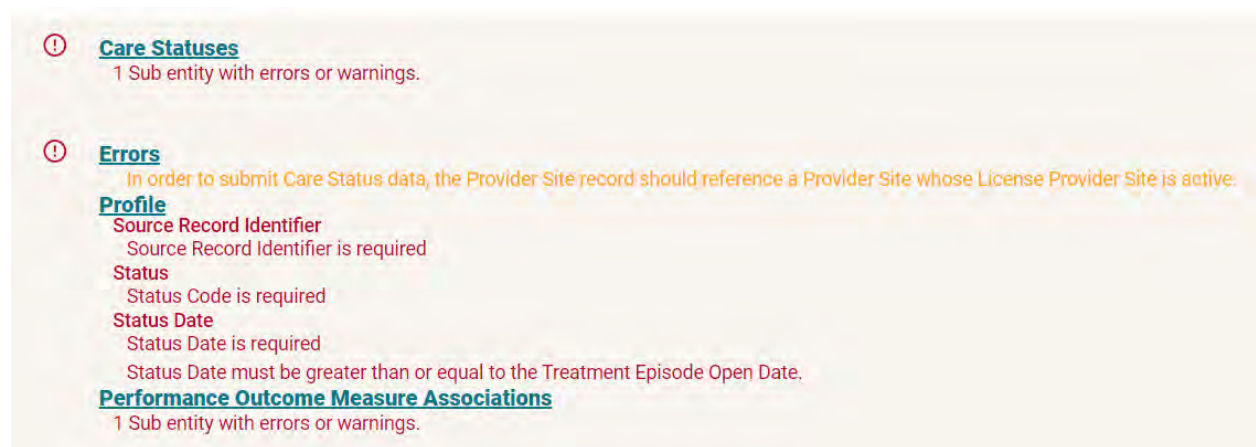
**This section is for providers manually reporting data via IBHRS Reporting module.**

IBHRS users who have had the data entry roles assigned by IDPH are able to input Integrated Treatment (SUD/PG) information directly into the system.

Below is a table of the Data Entry Screen Conventions in IBHRS.

Data Entry Screen Conventions	Name	Description
	Add Entity	Add information for a data set, or information within a data set.
	Submit Entry	Submits the information entered into IBHRS
	Source Record Identifier Generator	Generates a unique identifier for the SRI
	Delete	Delete Entity information
	Show Deleted Records	Will show records that have been deleted from IBHRS
	Duplicate	Will duplicate an Entity record (Only used in Performance Outcome Measure)

IBHRS Data Entry screens will display errors and warnings on screen upon Submission of the record. These will display at the top of the screen. Users may click on the error / warning at the top of the screen and IBHRS will take the user to that specific area within the screen itself.



Errors and Warnings will display under each applicable field within the Data Entry Screen itself. Note that all **Errors** (in red) must be corrected before the record can be successfully submitted. **Warnings** do not need to be corrected for the record to be submitted, but it's advised users do resolve Warnings appropriately.

## Profile

Source Record Identifier



Source Record Identifier is required

Status

Status Code is required

Status Date



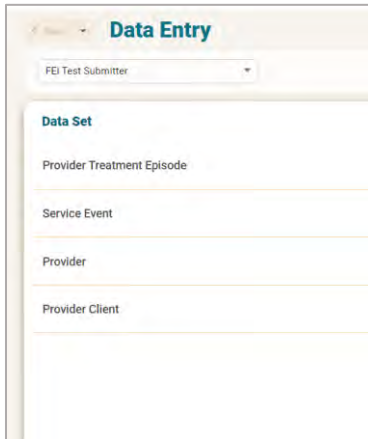
Status Date is required  
Status Date must be greater than or equal to the Treatment Episode Open Date.

Program Area

## 2.3.1 Enter Provider Client Data

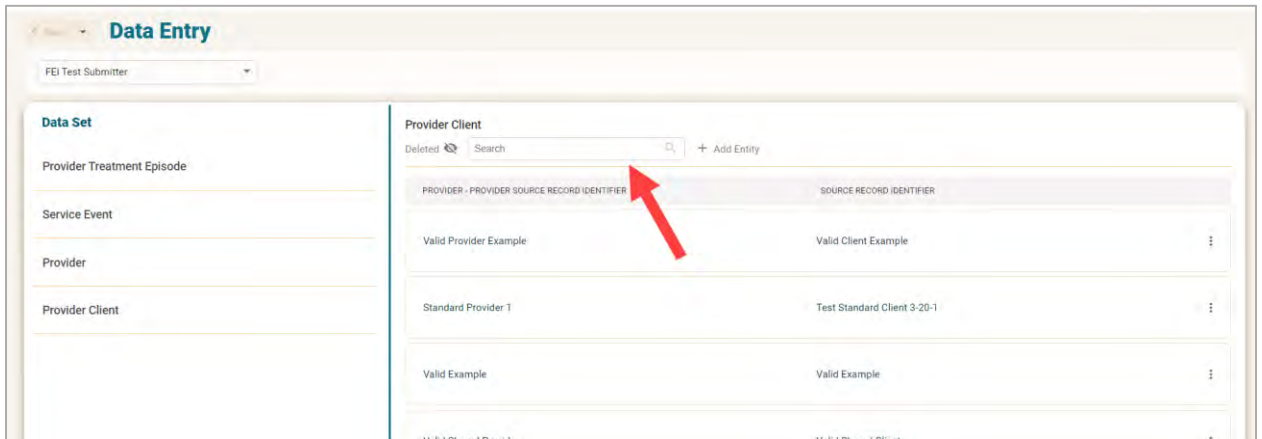
To enter client provider data, the provider must be entered first.

1. Click **Provider Client** on the Data Entry Screen.



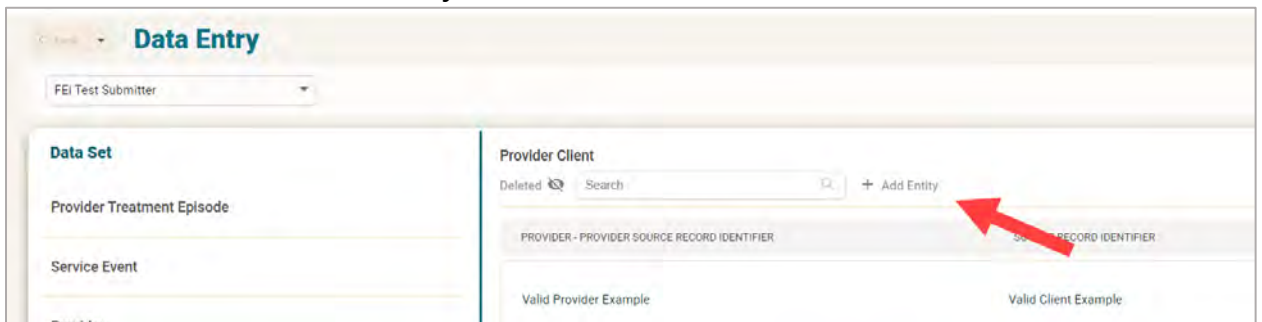
The screenshot shows the 'Data Entry' screen with a dropdown menu set to 'FEI Test Submitter'. Below this is a 'Data Set' section with several options: 'Provider Treatment Episode', 'Service Event', 'Provider', and 'Provider Client'. The 'Provider Client' option is highlighted, indicating it has been selected.

2. Search for the client before entering a client into the system with the search.



The screenshot shows the 'Data Entry' screen with the 'Data Set' section on the left and the 'Provider Client' section on the right. The 'Provider Client' section has a search bar and a '+ Add Entity' button. A red arrow points to the search bar. Below the search bar is a table with columns for 'PROVIDER - PROVIDER SOURCE RECORD IDENTIFIER' and 'SOURCE RECORD IDENTIFIER'. The table contains several rows of data, including 'Valid Provider Example', 'Standard Provider 1', and 'Valid Example'.

3. If the client is not found, click **+Add Entity**.



The screenshot shows the 'Data Entry' screen with the 'Data Set' section on the left and the 'Provider Client' section on the right. The 'Provider Client' section has a search bar and a '+ Add Entity' button. A red arrow points to the '+ Add Entity' button, indicating it should be clicked if the client is not found.

- 4. The Provider Client page will appear. Fill out the profile information.

- 5. Scroll down and fill out the provider Client Identifier. Click + **Add Entity**.

- 6. This will open the Provider Client page. Select the type of identifier, and input the information. When complete, click **Submit**, and then the back button to return to the client profile record.

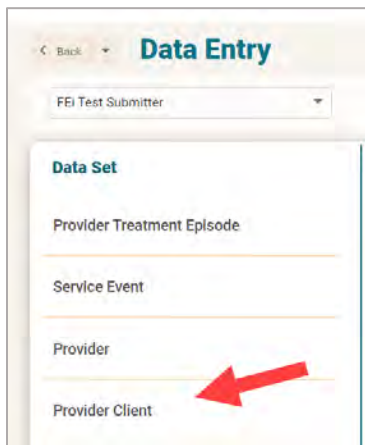
- 7. From the Client Profile page, add in the client's physical address.

- Fill out the address information for the client and click **Submit**, then the back button to return to the client profile page.

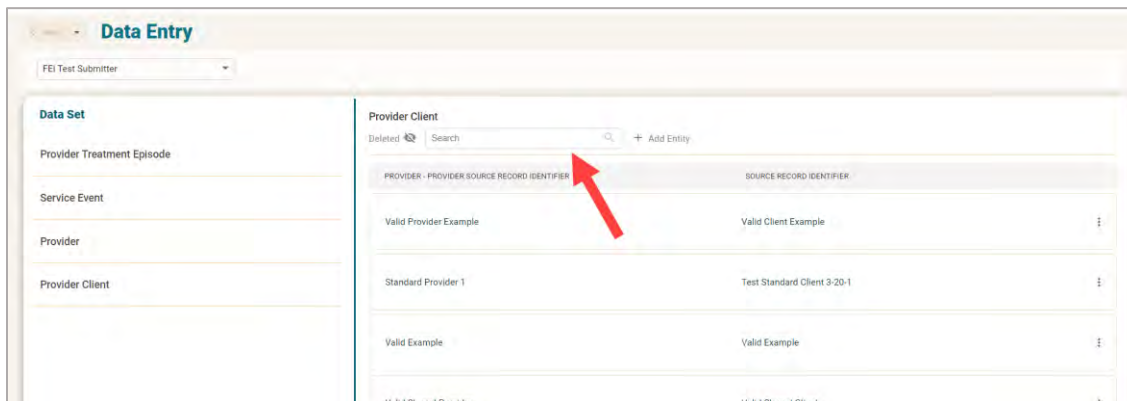
- When the whole record is complete, click **Submit** on the client profile page.

### 2.3.1.1 Edit Provider Client Information

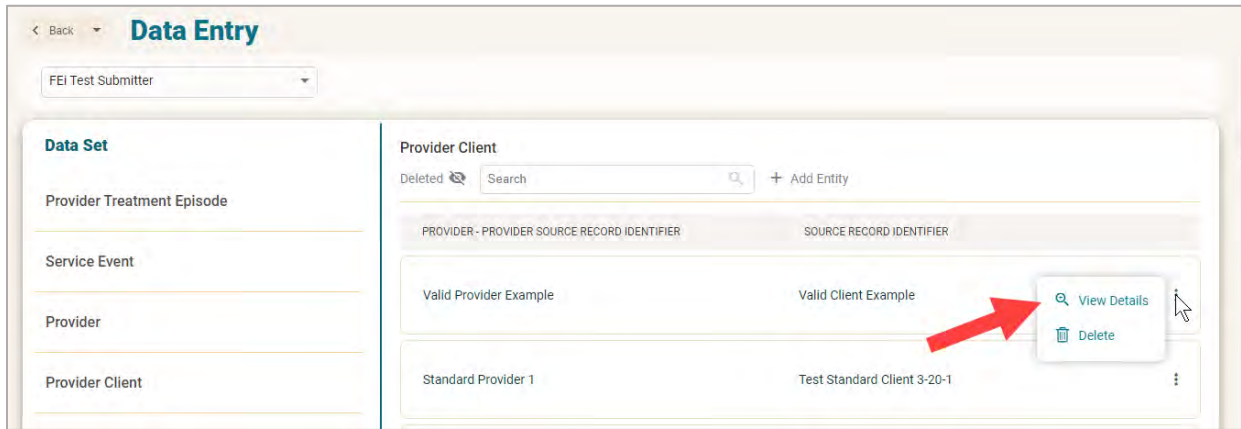
Step 1: Click **Client Provider** on the left side panel.



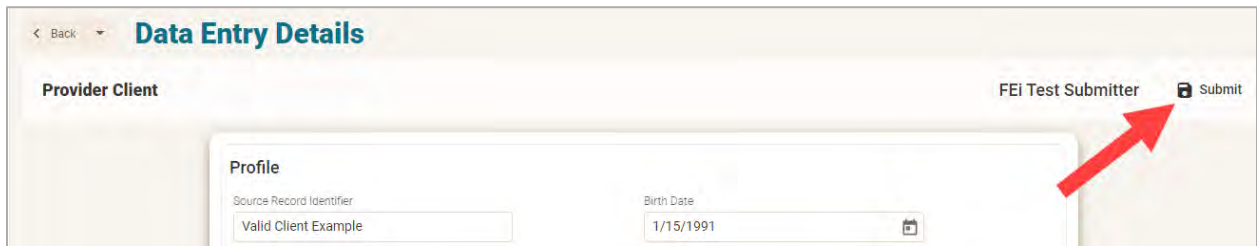
Step 2: Search for the Provider Client Record.



Step 3: When the Provider Client Record is identified, click the three dots to the right of the provider client, and go to **View Details**.



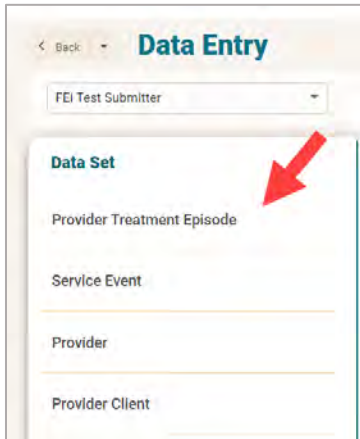
Step 4. Make your edits and click **Submit** when changes are complete.



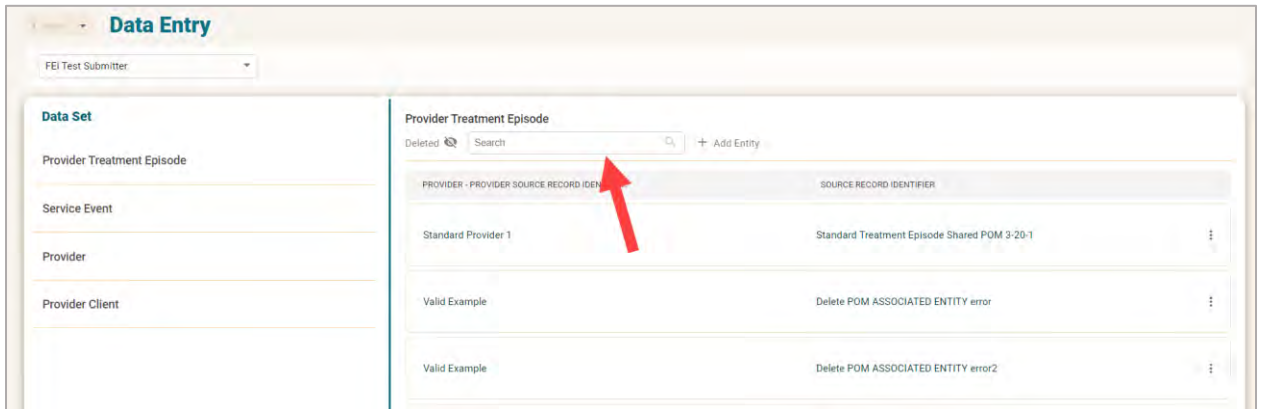
## 2.3.2 Enter Provider Treatment Data

To enter client provider treatment data, the client must be entered first.

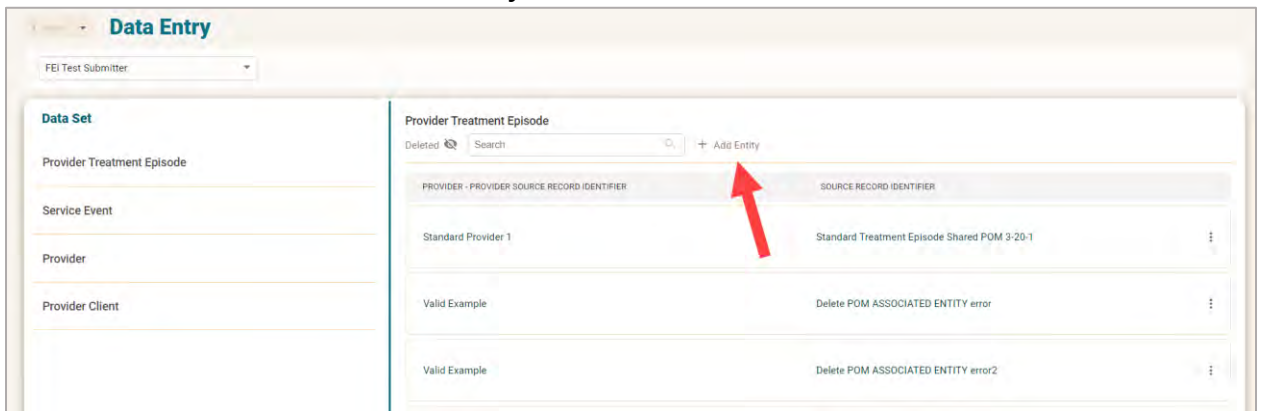
1. Click on Provider Treatment Episode on the Data Entry Screen.



2. Search for the treatment episode before entering a client into the system with the search.



3. If the record is not found, then click **+Add Entity**.





- 4. On the Provider Treatment Episode Page, fill out the profile information.

The screenshot shows the 'Provider Treatment Episode' form. The 'Profile' section contains the following fields: Source Record Identifier, Concerned Person, Evaluator Allowed To Contact Client, Involuntary Substance Use In Past 30 Days, Open Date, First Contact Date, Referral Source, Scheduled Admission Date, Pregnant At First Contact Date, and Closed Date. Each date field has a calendar icon. Below the profile section is a 'Provider' section with a dropdown menu.

- 5. Scroll down and click the **Provider** field to select.

This screenshot shows the 'Data Entry Details' page for the 'Provider Treatment Episode'. The 'Profile' section includes: Source Record Identifier, Residence County, HIV Positive, DUI Offender, Closed Date, First Contact Date, Injection Drug User, Referral Source, Start Date, and Discharge Residence County. A red arrow points to the 'Provider' dropdown field in the 'Provider' section.

- 6. This will bring up the Provider information. It will default to your provider number.

A close-up of the 'Provider' dropdown menu. The dropdown is open, showing a search bar with the number '1740' entered. There are search and refresh icons to the right of the search bar.

- 7. Scroll down and click the client field to select.

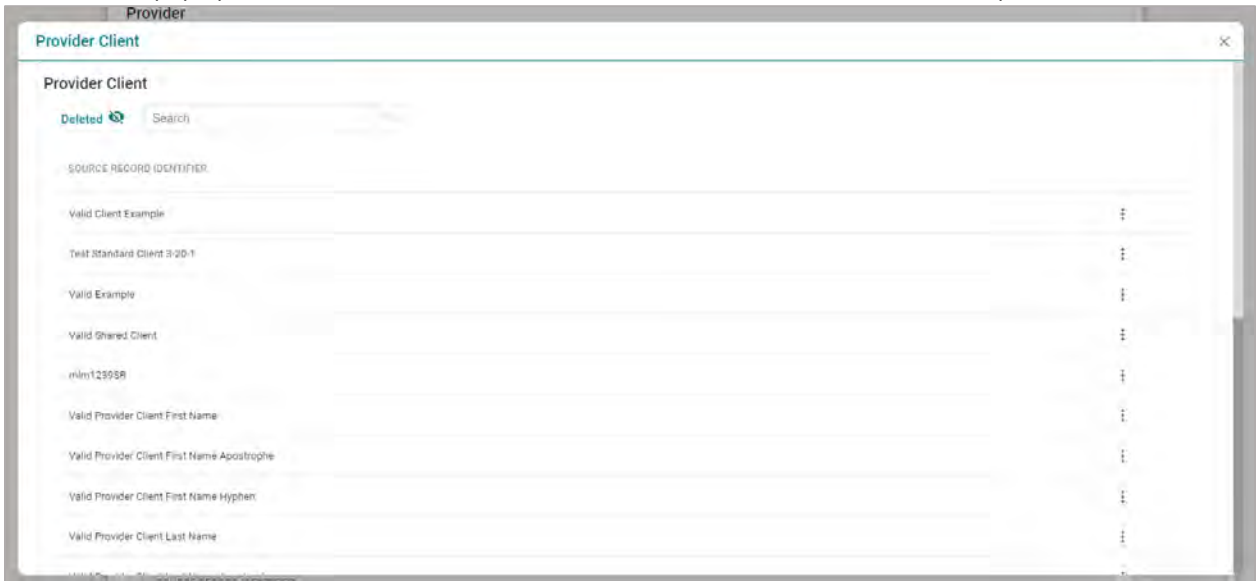


Provider Client

Provider Client

Search

- 8. A window will pop up with client names. Select the client to associate them to the Treatment Episode.



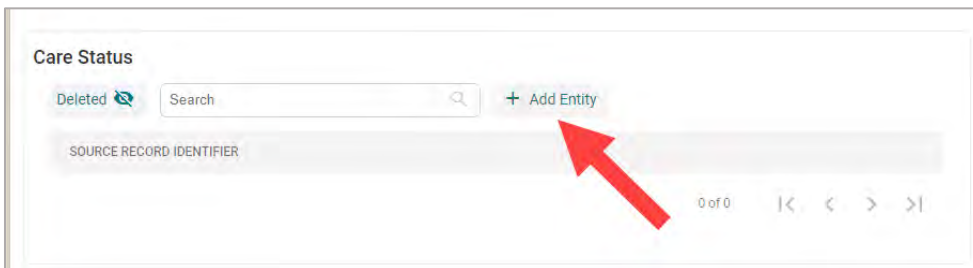
Provider Client

Deleted Search

SOURCE RECORD IDENTIFIER

- Valid Client Example
- Test Standard Client 9/20/1
- Valid Example
- Valid Shared Client
- nlm123998
- Valid Provider Client First Name
- Valid Provider Client First Name Apostrophe
- Valid Provider Client First Name Hyphen
- Valid Provider Client Last Name

- 9. Next, on the Care Status section, click **+Add Entity** to add admission information.



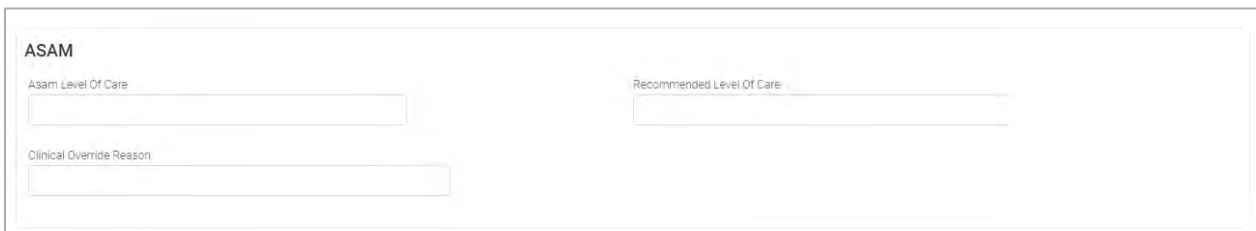
Care Status

Deleted Search + Add Entity

SOURCE RECORD IDENTIFIER

0 of 0 |< < > >|

- 10. Fill out the Care Status information.



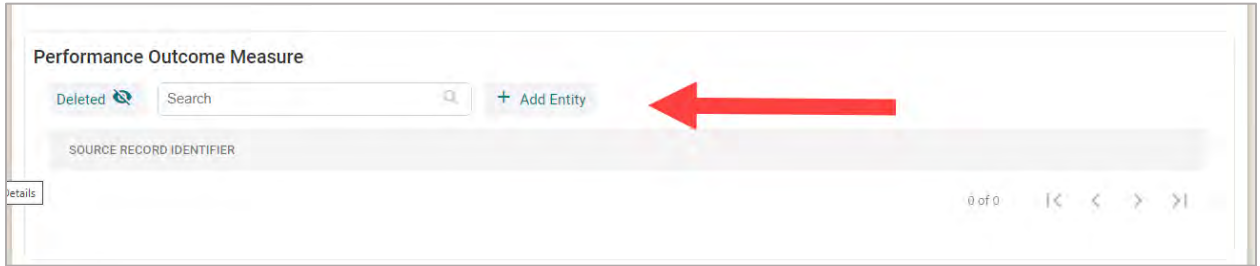
ASAM

Asam Level Of Care

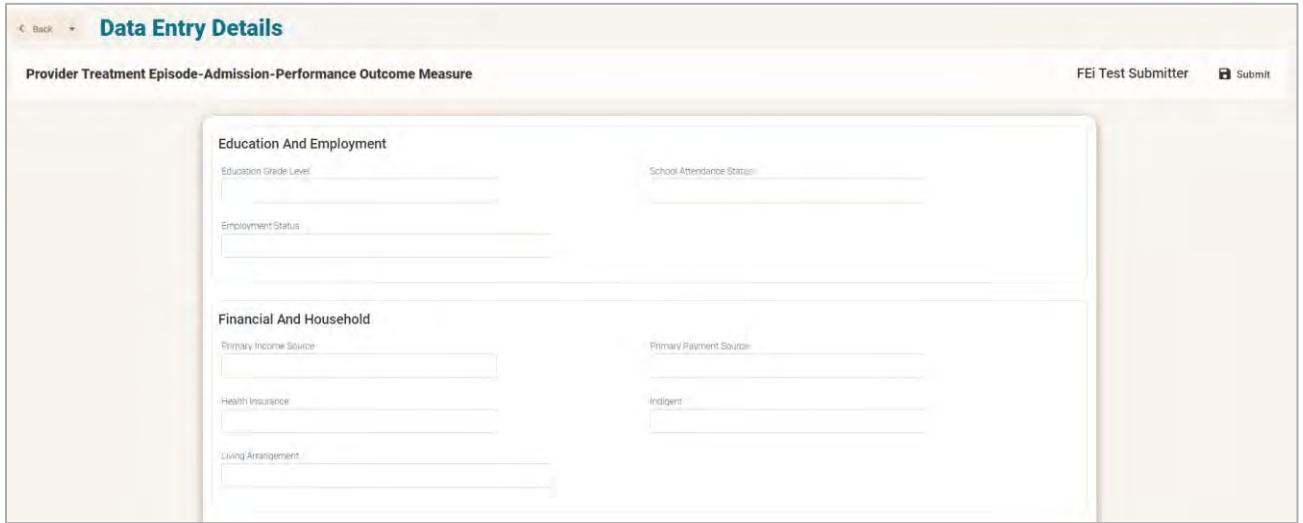
Recommended Level Of Care

Clinical Override Reason

- 11. In the Performance Outcome Measure section, click **+Add Entity** to enter the Performance Outcome Measure information.

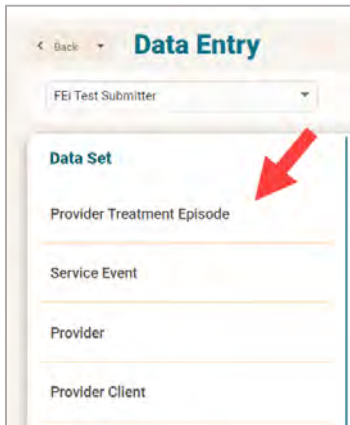


- 12. On the Performance Outcome measure page, enter the information, and click the **Submit** button.

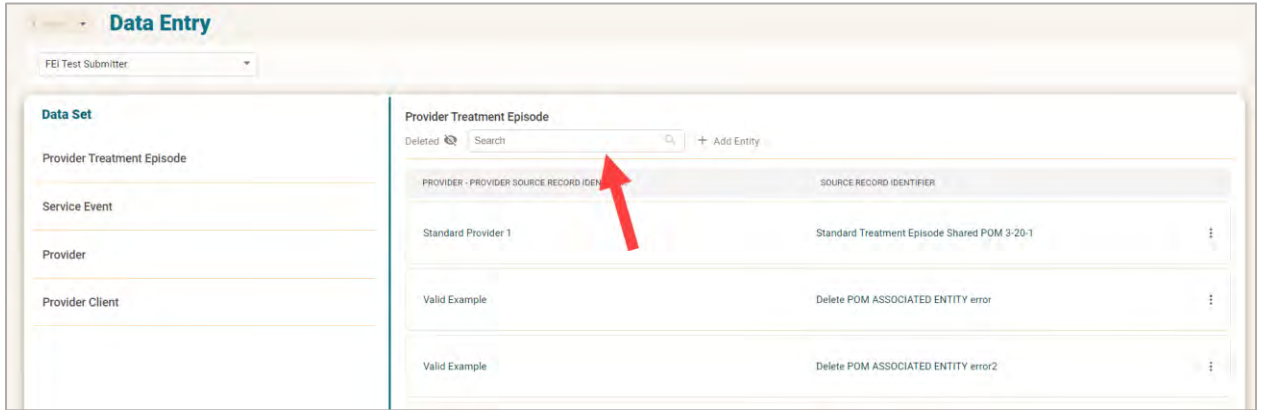


### 2.3.2.1 Edit Provider Treatment Information

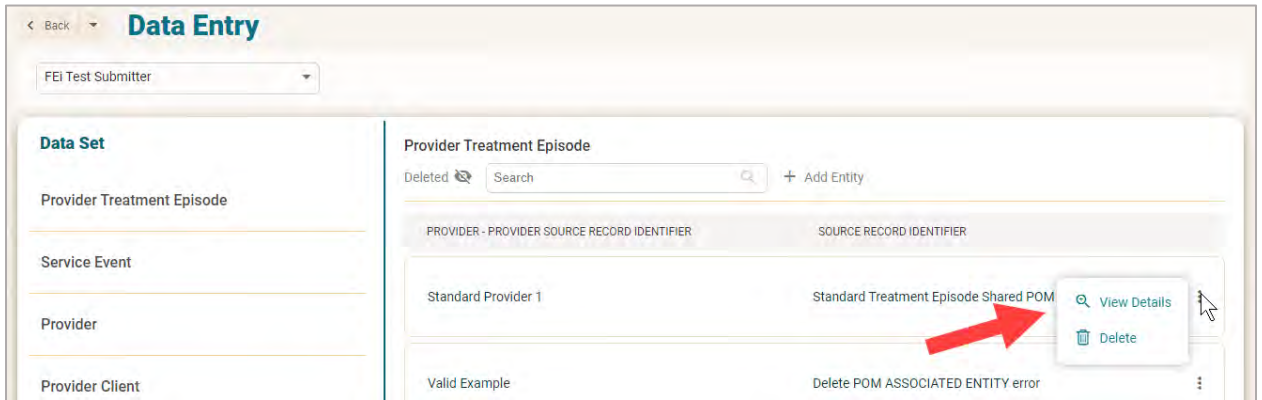
- 1. Click **Provider Treatment Episode** on the left side panel.



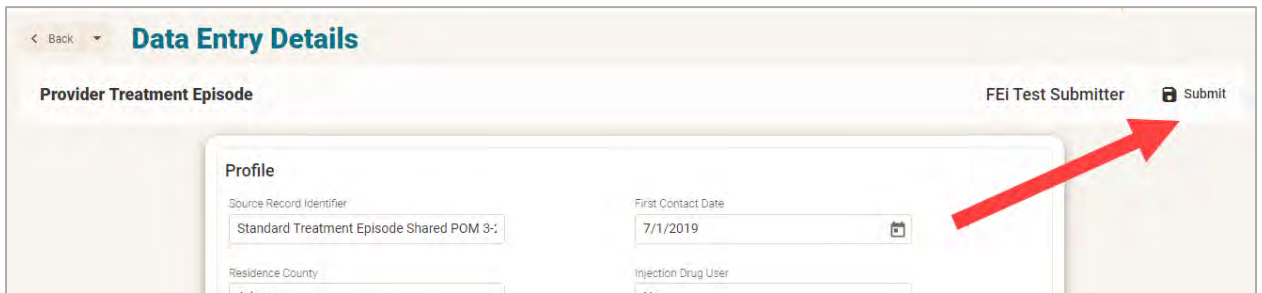
2. Search for the Provider Treatment Episode Record.



3. When the Provider Treatment Episode Record is identified, click the three dots to the right of the provider treatment episode, and go to **View Details**.



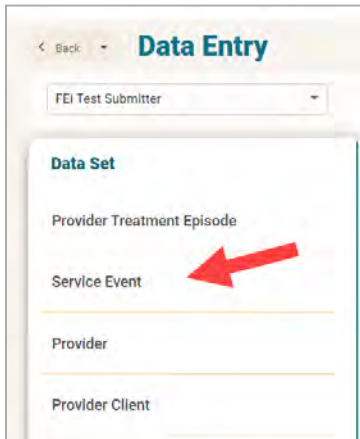
4. Make Edits and click **Submit** when changes are complete.



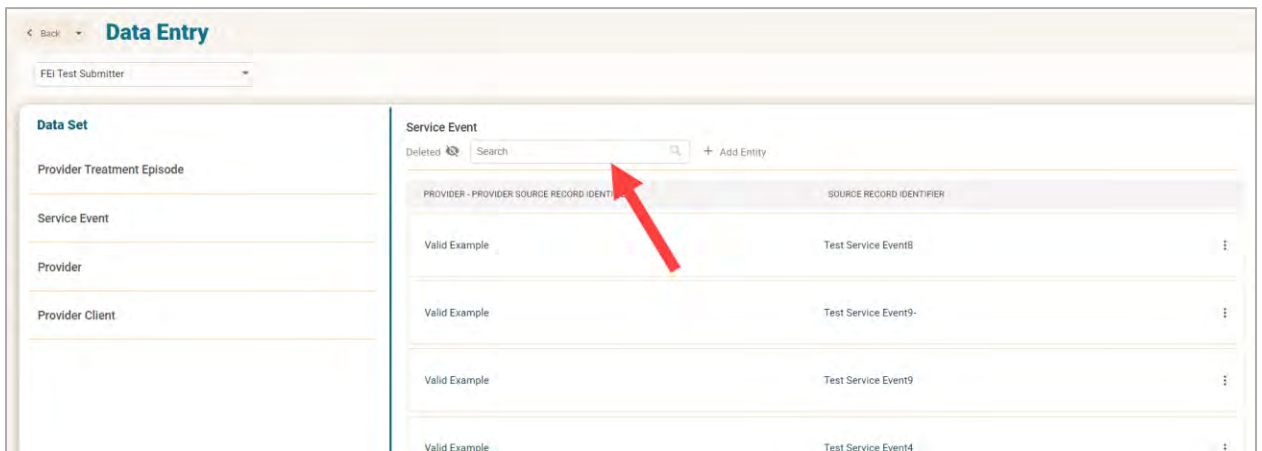
### 2.3.3 Enter Service Event Data

To enter Service Event data, the Treatment Episode must be entered first.

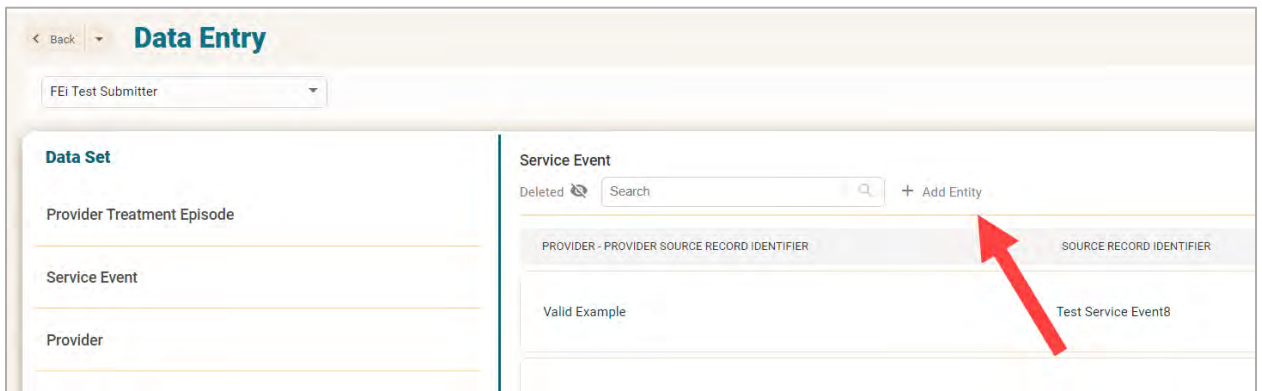
1. Click **Service Event** on the Data Entry Screen.



2. Search for the service event.



3. If the service event is not found, click + **Add Entity** to add a new service event.



- On the Service Event Screen, Enter the profile and provider information

- Search to connect the Provider Treatment Episode.

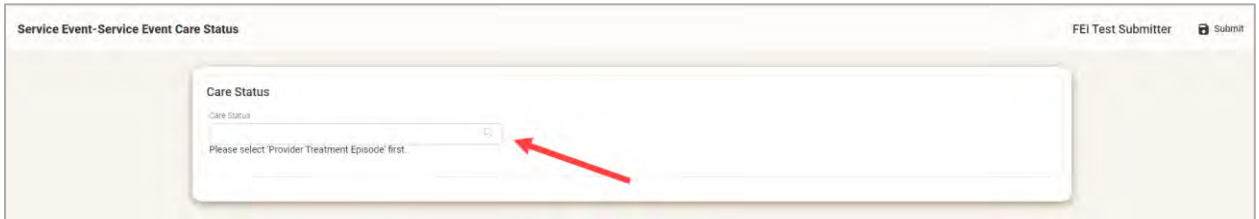
- Click Add Entity to add Service Event Procedure Modifier.

- Add the Modifier and the Sequence number, and click **Submit**.

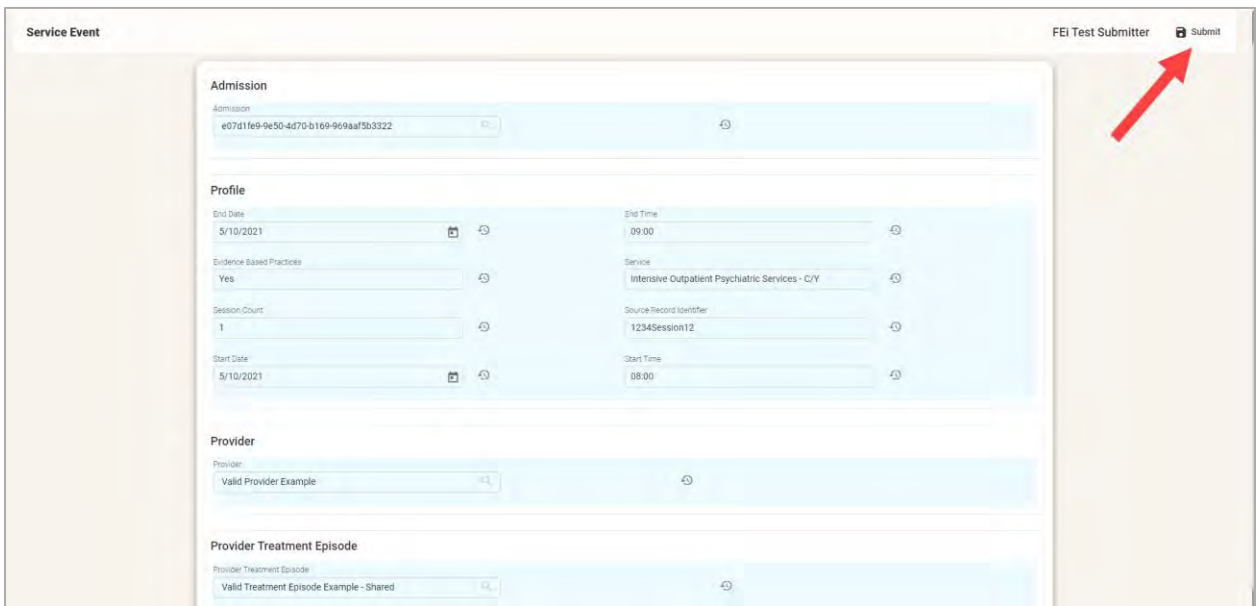
- Click Add Entity to add Service Event Care Status.



9. Use the search to connect the Care Status to the Service Event, and click **Submit**.

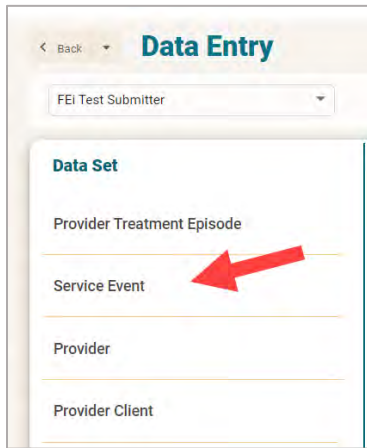


10. Once all fields are completed, Click the Submit button to submit the record.

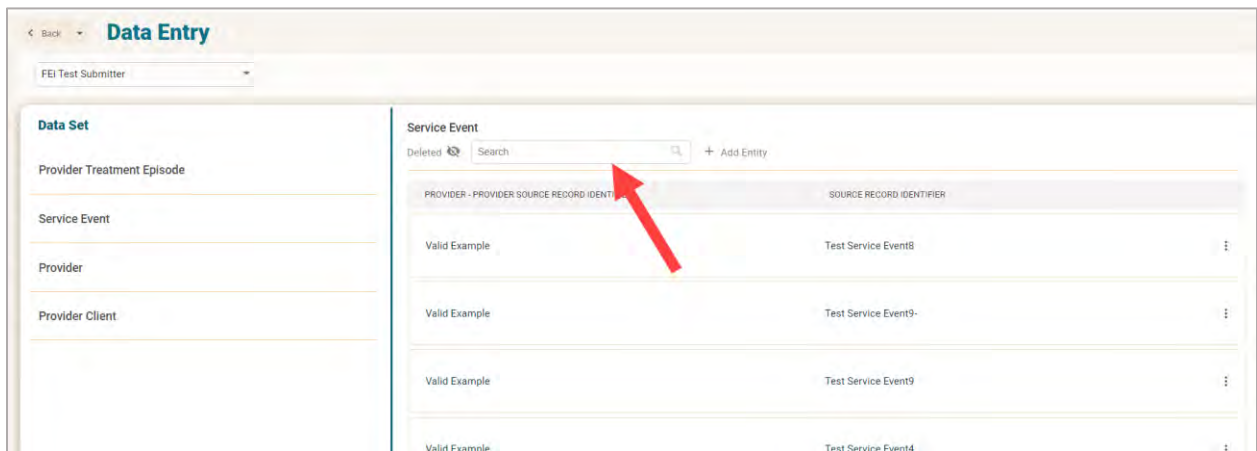


### 2.3.3.1 Edit Service Event Information

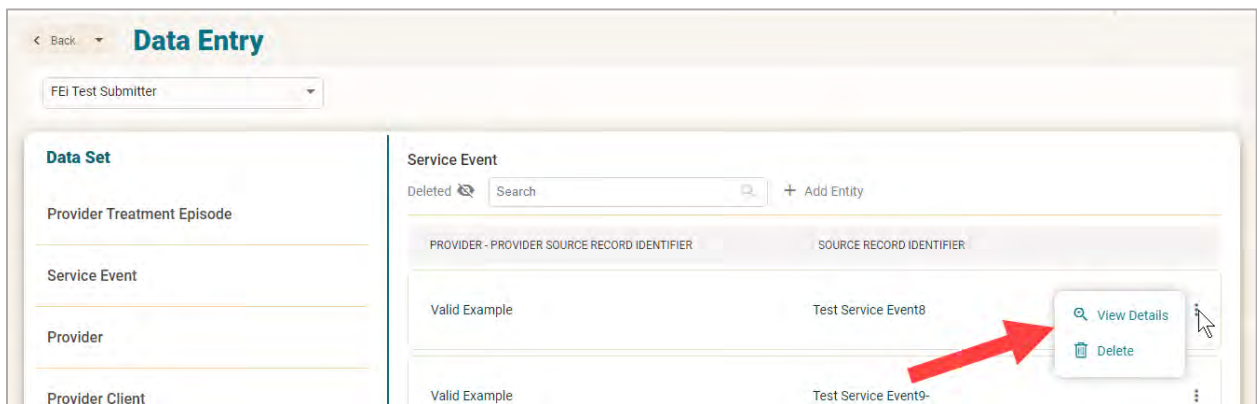
Step 1: Click Service Event on the left side panel.



Step 2: Search for the Service Event Record.

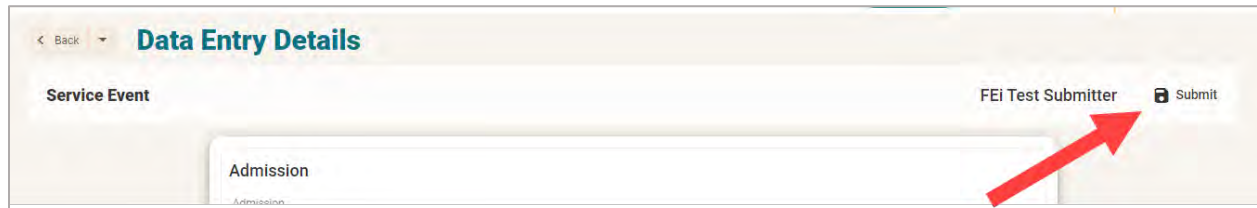


Step 3: When the Service Event Record is identified, click the three dots to the right of the Service Event, and go to **View Details**.





Step 4. Make your edits, and click **Submit** when changes are complete.



The screenshot displays a web interface for 'Data Entry Details'. At the top left, there is a '< Back' button. The main title is 'Data Entry Details'. Below this, there is a 'Service Event' section. On the right side of this section, there is a 'FEI Test Submitter' field and a 'Submit' button. A red arrow points to the 'Submit' button. Below the 'Service Event' section, there is an 'Admission' section with a sub-label 'Admission'.

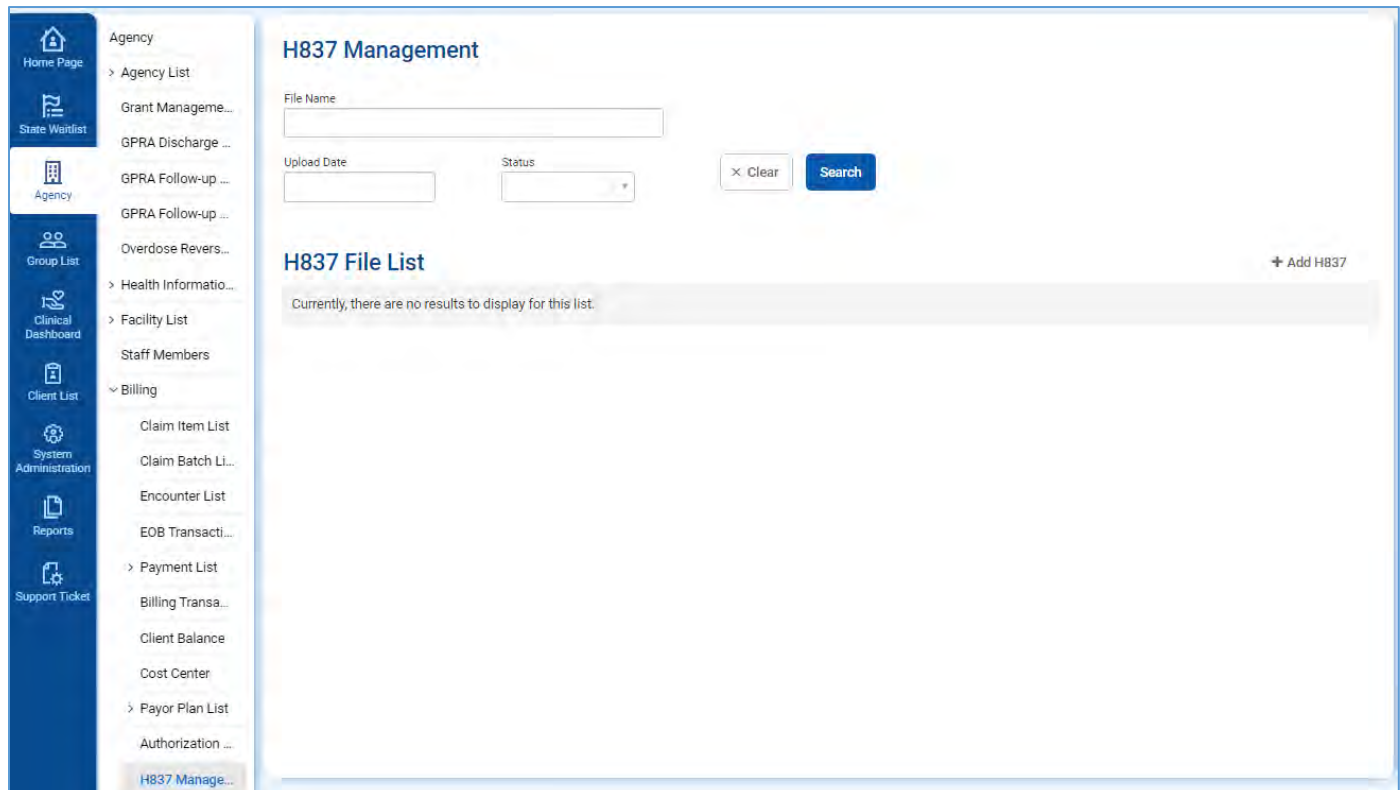
## 3 IPN Claims – H837 Process

IBHRS allows users to upload H837p files to submit IPN claims. This applies ONLY to IPN Providers. Further information regarding the requirements and specifications for the IPN H837p process is included in the **IBHRS 837p Companion Guide**, available at <https://idph.iowa.gov/Bureau-of-Substance-Abuse/Substance-Use-and-Problem-Gambling-Data/iowa-Behavioral-Health-Reporting-System/IBHRS-Documentation>.

### 3.1 Upload Instructions

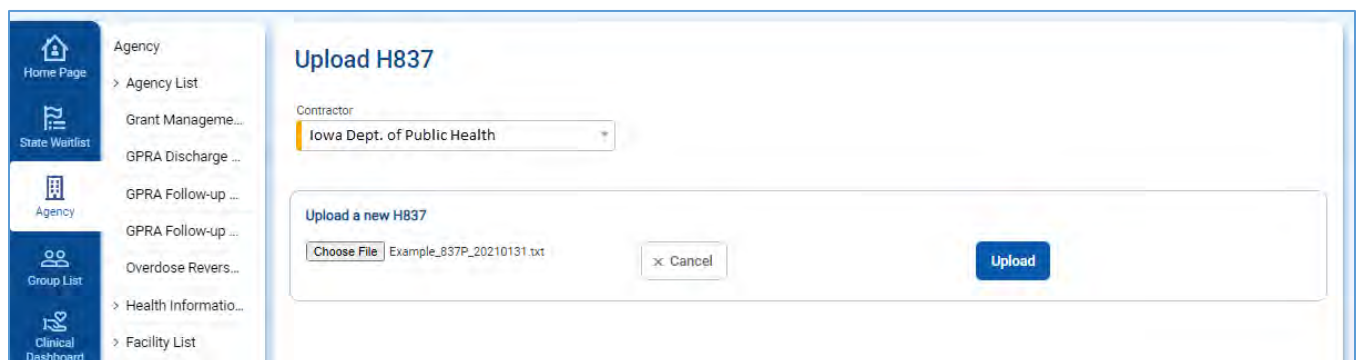
837P transactions are uploaded to IBHRS.

1. Navigate to the H837P Management screen under Agency/Billing and select **Add H837** from the list header.



The screenshot shows the 'H837 Management' interface. On the left is a navigation menu with categories like Agency, Billing, and Reports. The main area has a search form for H837 files and a list that is currently empty. A '+ Add H837' button is visible in the top right of the list area.

2. Click the **Choose File** button, select the file on your computer, and click the **Upload** button.



The screenshot shows the 'Upload H837' interface. The 'Contractor' dropdown is set to 'Iowa Dept. of Public Health'. The 'Upload a new H837' section shows a file named 'Example\_837P\_20210131.txt' selected, with 'Choose File', 'Cancel', and 'Upload' buttons.

- If the file is successfully uploaded, an information message is returned at the top of the screen. The file is queued for processing (Status = "Queued").

The screenshot shows the H837 Management interface. At the top, a green notification bar states: "File Example\_837P\_20210131.txt was uploaded successfully." Below this, the "H837 Management" section includes a search form with the following fields and values:

- File Name: Example\_837P\_20210131.txt
- Upload Date: 1/7/2021
- Status: Queued

The "H837 File List" table below shows one entry:

FILE NAME	UPLOADED DATE	STATUS
Example_837P_20210131.txt	1/7/2021	Queued

- Once processed, the file status changes to "Processed" or "Failed." Failed 837P transactions must be resubmitted by the provider agency.

The H837 File List may be filtered based on file name, upload date, and status.

The screenshot shows the H837 Management interface with a larger file list. The search form is empty. The "H837 File List" table contains the following entries:

FILE NAME	UPLOADED DATE	STATUS
Example_837P_20210131.txt	1/7/2021	Queued
Example2_GR707070_WI76102a_837.txt	11/18/2020	Failed
Example2_GR707070_WI76102_837.txt	11/18/2020	Failed
H8371_GR14231_WI76102g_837.txt	11/18/2020	Processed
H8371_GR14231_WI76102f_837.txt	11/18/2020	Failed
H8371_GR14231_WI76102e_837.txt	11/18/2020	Failed
H8371_GR14231_WI76102d_837.txt	11/18/2020	Failed
H8371_GR14231_WI76102c_837.txt	11/18/2020	Failed
H8371_GR14231_WI76102b_837.txt	11/18/2020	Failed
H8371_GR14231_WI76102_837.txt	11/18/2020	Failed

## Processed Submissions

Processed 837P transactions will be adjudicated by IBHRS. The adjudication schedule will be posted at on [IBHRS Documentation](#) webpage and on the [IPN Documents webpage](#).

## Failed Submissions

If the 837P fails during processing, the error messages are displayed on the submission profile. A full list of error messages and resolutions is provided in [Appendix D](#). Failed 837P submissions must be corrected and resubmitted. Provider agencies should notify IBHRS if they continue to receive an error after making necessary corrections.

The screenshot displays the 'H837 Profile' page in the IBHRS system. On the left is a navigation sidebar with icons for Home Page, State Waitlist, Agency, Group List, Clinical Dashboard, Client List, System Administration, Reports, and Support Ticket. The main content area is divided into two sections: 'H837 Profile' and 'Errors (Export)'. The 'H837 Profile' section contains several input fields for submission details: File Name (Test\_MS837\_6\_Error.txt), Contractor Agency (Contractor), Status (Failed), and Provider Agency (SA Provider). To the right of these fields are fields for Uploaded By (Warrier, Ashwin), Upload Date (11/5/2019), Process Start Date (11/5/2019), and Process End Date (11/5/2019). Below the profile fields are 'Finish', 'Search', and 'Clear' buttons. The 'Errors (Export)' section features a table with columns for 'CODE' and 'MESSAGE'. The table contains one entry: 'H837Processor' with the message 'One or more claim lines do not contain the Line Note Text in Loop 2400 NTE02.'

CODE	MESSAGE
H837Processor	One or more claim lines do not contain the Line Note Text in Loop 2400 NTE02.

## 3.2 999 Acknowledgment for Health Care Insurance

The 999 is returned for all 837P transactions that were successfully processed. Contact IBHRS if a 999 is not available for download within the expected timeframe. You will also receive an email when your file is accepted or rejected.

Navigate to the H999 Management screen under Agency/Billing. The 999 may be downloaded from the list or from the profile.

Note that a 999 is not returned for failed submissions. Refer to the [Failed Submissions](#) section for additional information.

### Download Instructions

1. Navigate to the H999 Management screen under Agency/Billing.
2. Select "Download" from the Action column to download the 999.

The screenshot displays the 'H999 Management' interface. On the left is a navigation sidebar with categories like Agency, Billing, and Client List. The main content area is titled 'H999 Management' and includes search filters for 'File Name' and 'Upload Date'. Below this is the 'H999 File List' table, which has columns for 'FILE NAME', 'UPLOAD DATE', and 'CREATED DATE'. The first row is highlighted in yellow and has a 'Download' button in its action column. Other rows show various file IDs and their corresponding upload and creation dates.

FILE NAME	UPLOAD DATE	CREATED DATE	Action
1234512_20191105133615_2345234-2.999		11/5/2019 12:36 PM	Profile Download
1234512_20200127095714_2345234-10.999		1/27/2020 8:57 AM	
1234512_20200608173607_2345234-12.999		6/8/2020 4:36 PM	
1234512_20200611194834_2345234-11.999		6/11/2020 6:48 PM	
1234512_20200612135110_2345234-13.999		6/12/2020 12:51 PM	
1234512_20200709161954_2345234-14.999		7/9/2020 3:19 PM	
1234512_20200709171156_2345234-15.999		7/9/2020 4:11 PM	
1234512_20201008101957_2345234-35.999		10/8/2020 9:19 AM	
135_20201217105422_2345234-36.999		12/17/2020 9:54 AM	

### 3.3 835 Health Care Claim Payment/Advice

The 835 is available for download once claims are adjudicated by IBHRS. Contact IBHRS if an 835 is not available for download within the expected timeframe.

#### Download Instructions

1. Navigate to the H835 Management screen under Agency/Billing.
2. Select "Download" from the Action column to download the 835.

The screenshot displays the H835 Management interface. On the left is a navigation sidebar with categories: Agency, Billing, and Support Ticket. The main content area is titled 'H835 Management' and includes search filters for File Name, Agency (set to 'SA Provider'), and Upload Date. Below the filters is a 'Search' button and a 'Clear' button. The 'H835 File List' table contains three rows of data. The first row is highlighted, and a context menu is open over it, showing 'Profile' and 'Download' options.

FILE NAME	UPLOADED DATE	STATUS	
1234512_20191113131125_2345234-35.835	11/13/2019 12:11 PM	Processed	Profile Download
1234512_20200612135410_2345234-36.835	6/12/2020 12:54 PM	Processed	
1234512_20201019125020_2345234-37.835	10/19/2020 11:50 AM	Processed	

## 4 Reports

### PURPOSE

The IBHRS administrative portal allows users to run reports based on data contained within IBHRS.

### 4.1 Run Reports

Follow the steps below to run reports within the IBHRS Portal.

Reports:

#### Client

**Client Search-** Providers can use this report to look up the client's Enterprise Unique Identifier (EUID). This will be important for IPN providers for 837 file submission.

#### Job Submission Performance

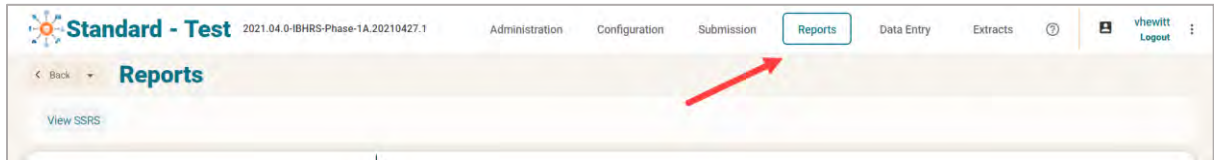
**Failed Records-** Providers can use this report to view the failed records in uploads in order to see what records need to be fixed to successfully upload. This report can be filtered by date range, error status, and data set type.

**Overall Job Performance-** This report illustrates with charts and graphs the overall job performance of uploaded files. It can be filtered by date range and data set.

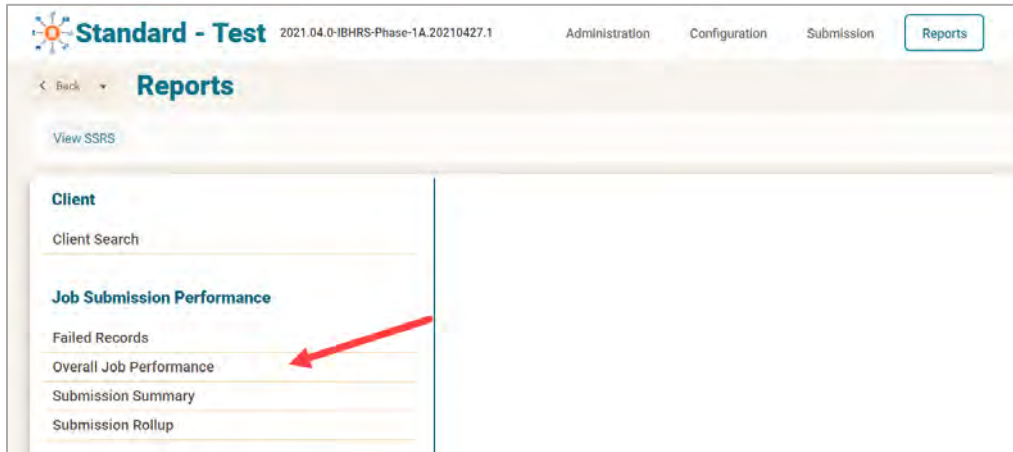
**Submission Summary-** This report will give a summary of all submission for a provider. It includes number of files, % without errors, Number of submitted records, number of successful records, number of failed records, and % of successful records. This report can be filtered by date range and provider.

### 4.1.1 How to run a report

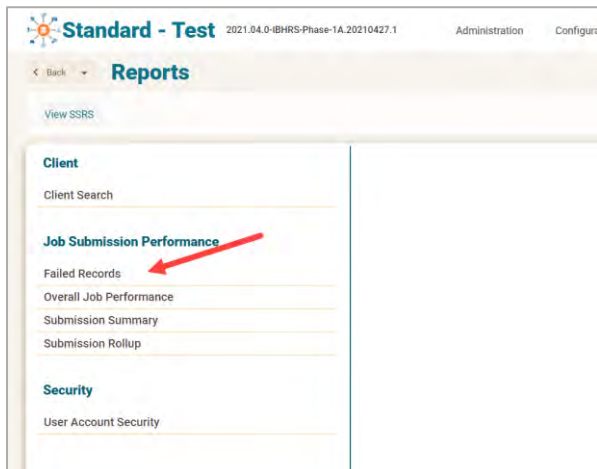
1. Log in to the IBHRS Portal.
2. Click the **Reports** tab. This will open the Reports screen.



3. On the Reports screen different report categories will be displayed in this left menu.

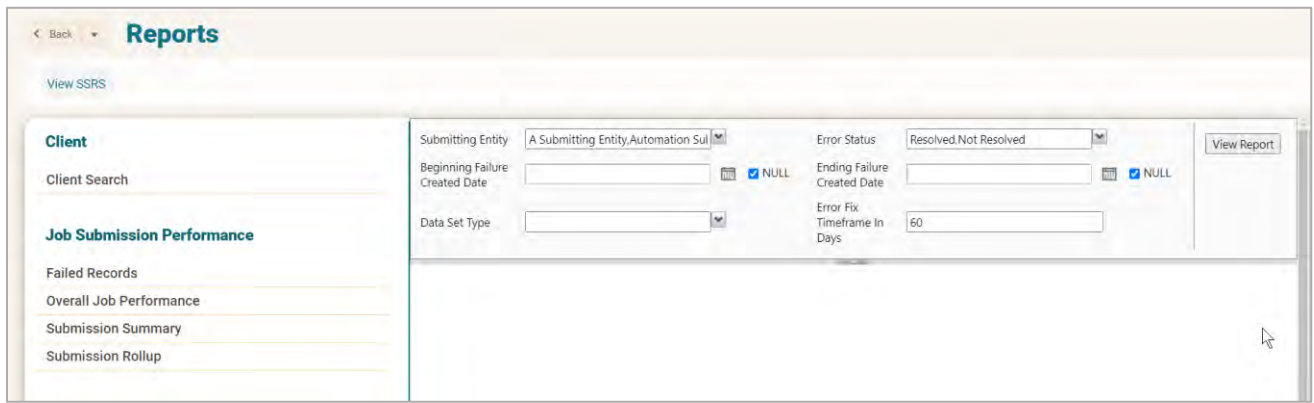


4. Click on any of the available report names.

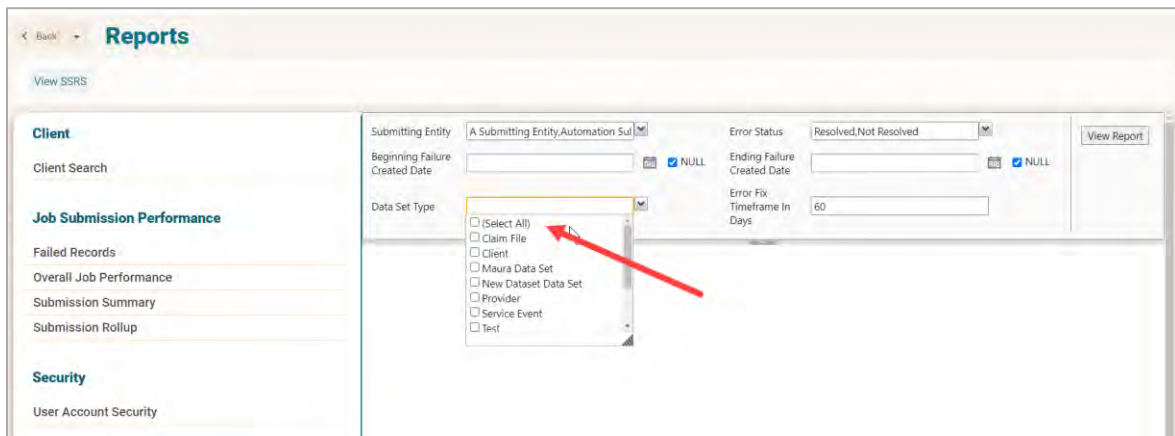


5. The screen will then refresh to display the report along with any associated parameters. Some reports may require you to select values for these parameters in order for the report to run. Unless the NULL checkbox is selected next to the parameter, the field is required.





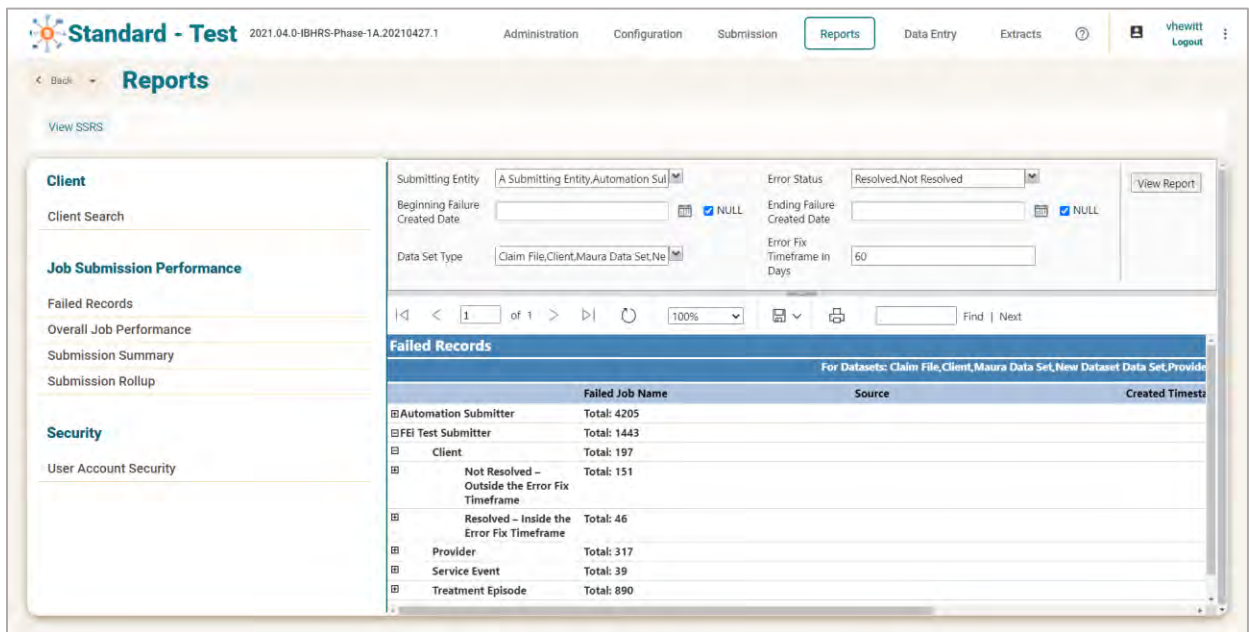
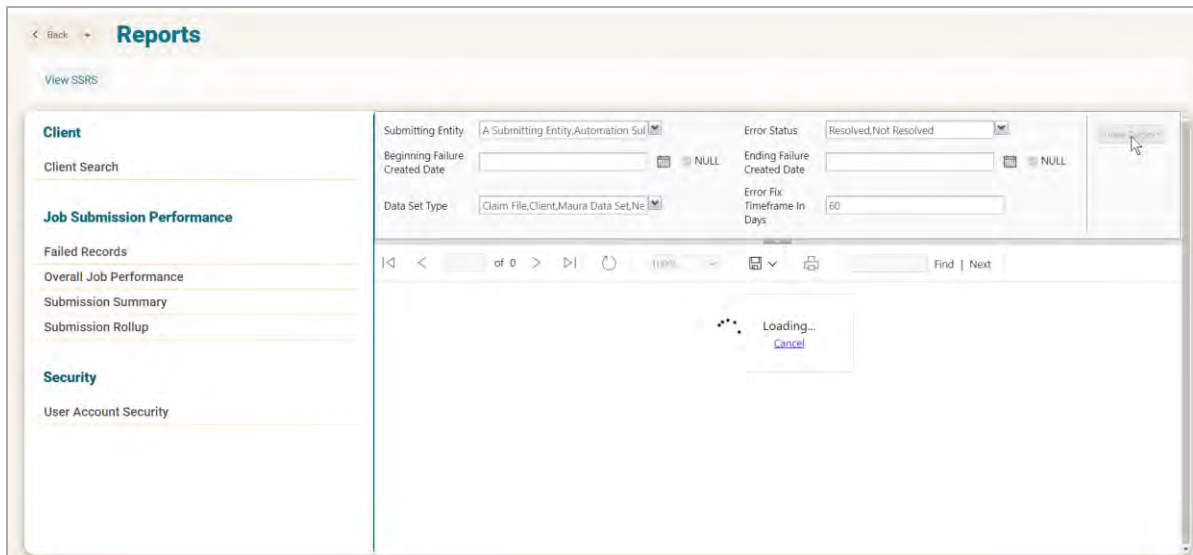
6. If the parameter fields are blank, enter or select values for each parameter. If the parameter fields have been pre-populated with values, modify those fields as needed.



7. After selecting or updating the parameters, click **View Report**.



8. The report will then generate based on the selected parameters and will be displayed on screen. If no data is available based on the parameters, the report will be blank.



9. Use the controls within the report toolbar to scroll through pages of the report, refresh, zoom, save to your computer, print, and search.

Start Date  End Date   
User  DataSet

1 of 2 ? 100% Find | Next

Over Job Performance: 1/1/2019 - 12/31/2019

### Overall Job Performance

Total Submissions: 1143

Data Set Submission Counts

Category	Count
Client	~650
Provider	~150
Provider Licensing	~350

Data Set Error Counts

Category	Count
Client	~650
Provider	~150
Provider Licensing	~350

Overall Job Count vs Error Count

Date	Job Count	Error Count
8/16/2019	~100	~100
8/19/2019	~100	~100
8/20/2019	~100	~100
9/5/2019	~100	~100
9/9/2019	~800	~1400
9/10/2019	~800	~1400
12/8/2019	~100	~100
12/9/2019	~100	~100
12/13/2019	~100	~100

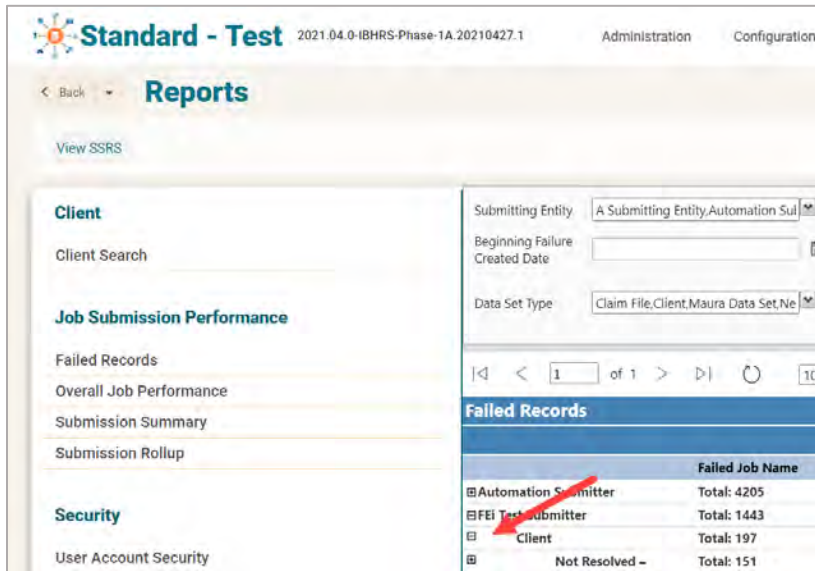
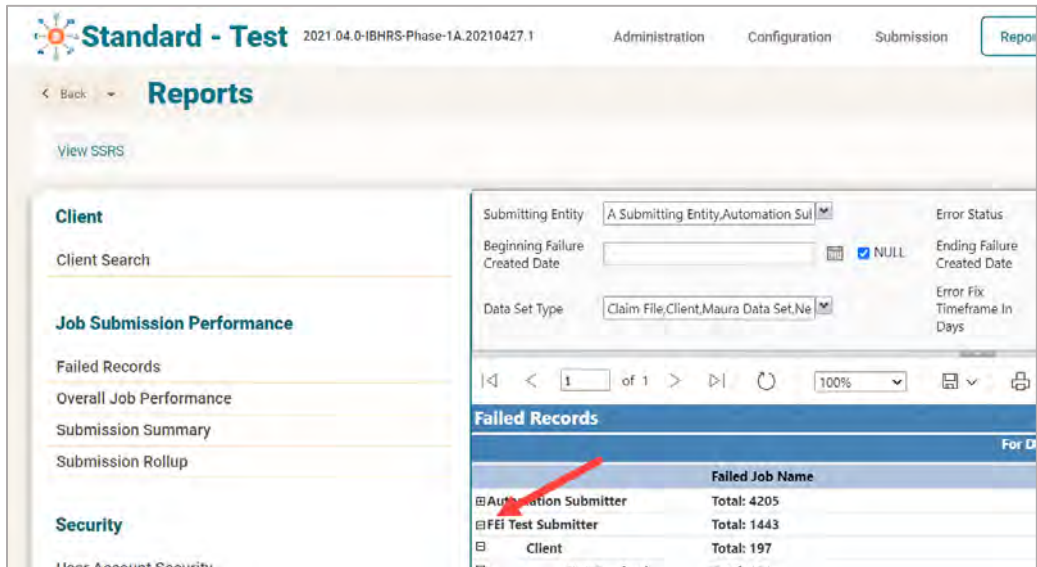
### FEi Test Submitter

Total Submissions: 150

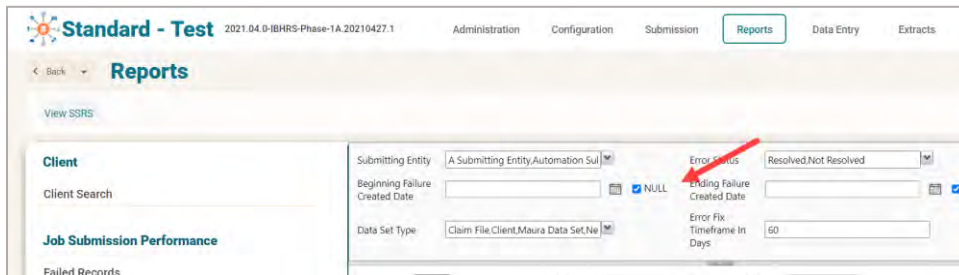
Data Set Error Counts

### 4.1.2 Additional Notes

Some reports may include detailed rows of information. These rows may be collapsed by default, and can be expanded by clicking the plus sign (+). To collapse a row, click the minus sign (-).



Uncheck "NULL" to select or enter a date.



## 5 User/Staff Management

### PURPOSE

IBHRS allows those with applicable permissions the ability to manage IBHRS user accounts.

### 5.1 Overview

Staff Management functionality is accessed within IBHRS under Agency and Staff Members. Staff Management managing staff member accounts that have been created by IDPH.

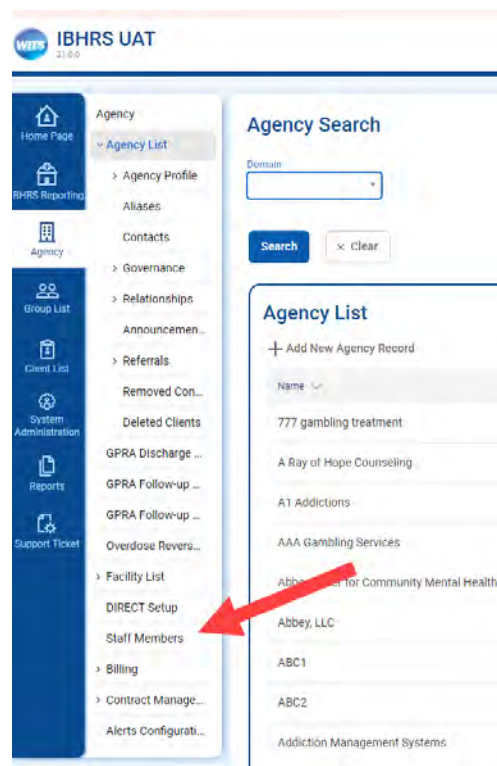
IBHRS Agency Administrators may complete the following actions for Staff Member accounts:

1. Update Staff Member Profile
2. Reset Credentials
3. Reset TOTP
4. Enable/Disable Accounts

Only IDPH may create new user accounts, assign roles and Lock/Unlock accounts.

#### Accessing the Staff Member Screen

On the left side panel, click Agency > Staff Members.



#### Searching for Staff Members

From the Staff Member Search screen, you can use the search bar to find existing staff members by searching for their first name, last name, email address or User ID (the User ID is displayed in the column titled, "Identifier").

The screenshot shows the 'Staff Member Search' page. On the left is a navigation sidebar with options like Home Page, Agency, Group List, Client List, System Administration, Reports, and Support Ticket. The main area has a search bar and a 'Search' button, which is highlighted by a red arrow. Below the search bar is a table of staff members with columns for First Name, Last Name, Agency, Status, Email, Identifier, Start Date, and Termination Date. The table shows several entries, including Admin, System, Pre-WITS Migration, David, SSRS, Amber, Andrew, and Andre.

**Table View**

This image shows a close-up of a table row. The row is highlighted in yellow and contains the following data: Val Hewitt, Administrative Agency, Active, val.hewitt@feisystems.com, vhewitt, 01/01/2021. A context menu is open on the right side of the row, listing actions: End IP Session, Lock Agency Access, Reset Credentials, and View Profile.

Val	Hewitt	Administrative Agency	Active	val.hewitt@feisystems.com	vhewitt	01/01/2021
Michael	George	Administrative Agency	Active	Michael.George@feisystems.com	mgeorge	
Admin	Train1	Administrative Agency	Active	Val.Hewitt@feisystems.com	Admintrain1	01/24/2021
Admin	Train2	Administrative Agency	Active	Val.Hewitt@feisystems.com	Admintrain2	01/24/2021
Admin	Train3	Administrative Agency	Active	Val.Hewitt@feisystems.com	admintrain3	01/24/2021

**Panel View**

The screenshot shows the 'Staff Member Workspace' for a user. The page has a breadcrumb '[< Staff Member Workspace](#)' and an 'Edit' button. On the left is a sidebar menu with options: Profile, Employment Profile, User Account, Contact Information, and Identifiers. The main content area is divided into two sections: 'Profile' and 'Employment Profile'. The 'Profile' section shows a blue circular avatar with 'AU' and the text 'USER, Admin', 'Unknown', and 'Date of Birth:'. The 'Employment Profile' section contains fields for Job Title, Staff Member Type (State Administrative Staff), Employment Type, Employment Date Range, Full Time Equivalent, Taxonomy Type, Taxonomy Classification, and Taxonomy Specialization. There is also a 'Relationships:' section at the bottom.

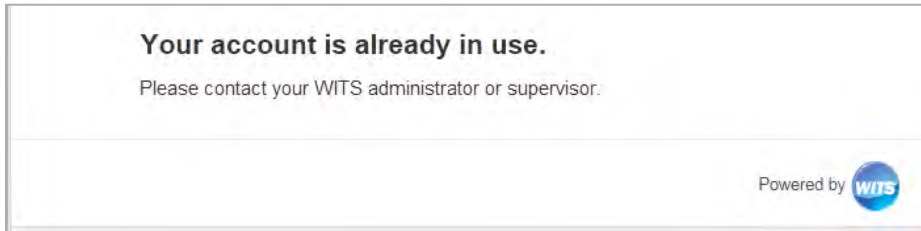
## 5.2 Troubleshooting Help for Staff Management

### 5.2.1 Use Case: Account in Use

**Message:** "Your Account is Already in Use"

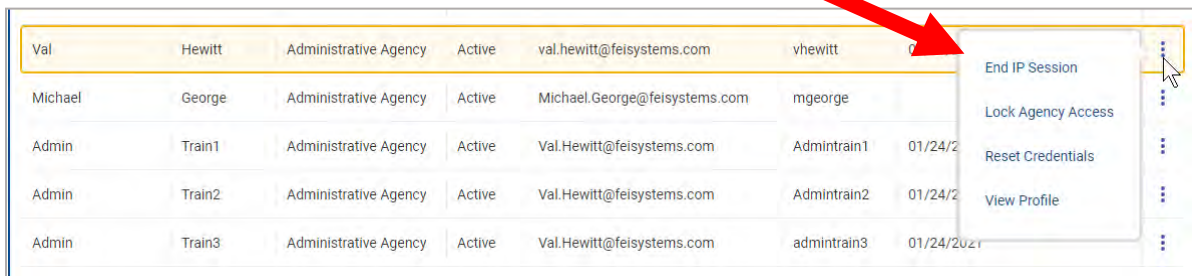
**Solution:** End IP System Session

There are two (2) options available to resolve this issue.



#### 5.2.1.1 Option 1: Staff Members List

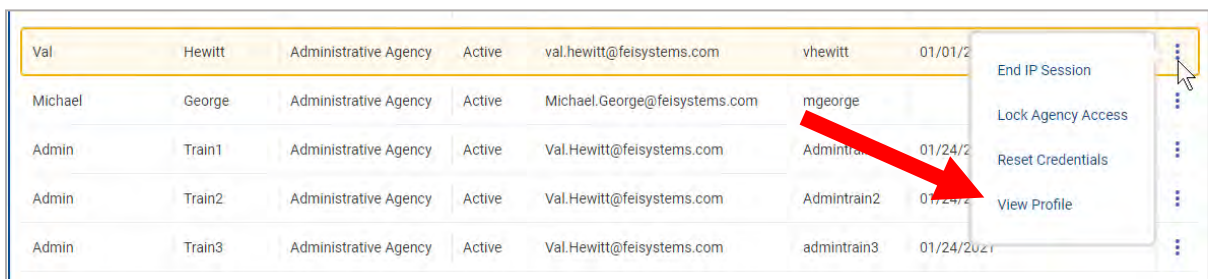
1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **End IP Session**.



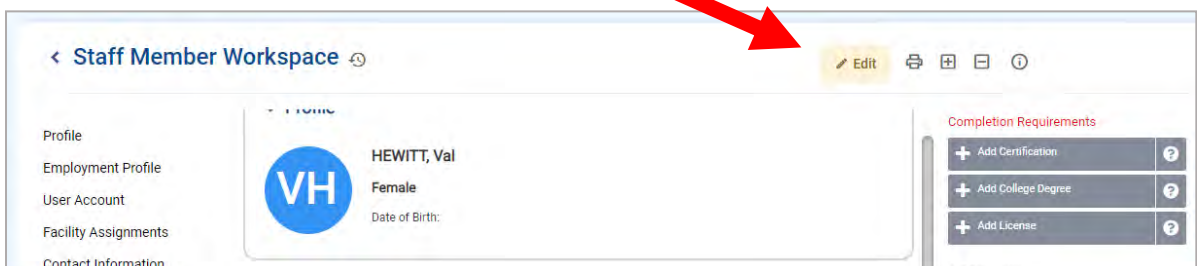
2. Ask the staff member to try logging in again.

#### 5.2.1.2 Option 2: Staff Member Profile

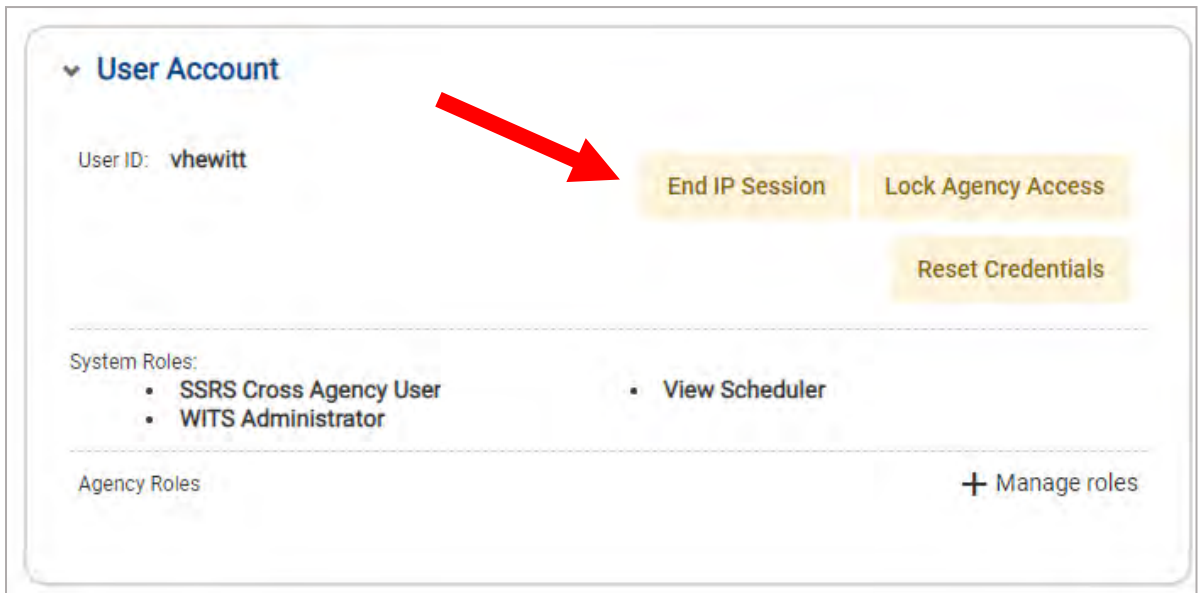
3. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **View Profile**.



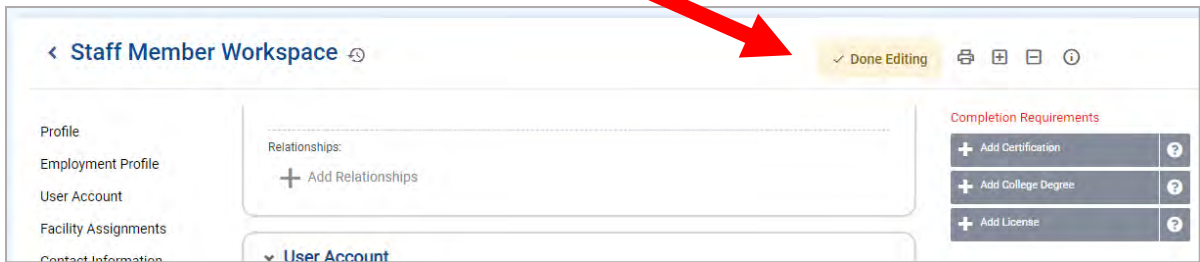
4. Click **Edit**.



5. In the User Account panel, click **End IP Session**.



6. Click **Done Editing**.



7. Ask the staff member to try logging in again.



## 5.2.2 Use Case: Reset Credentials Link Expired

**Message:** "Your Reset Credentials Link Has Expired"

**Solution:** Reset Credentials

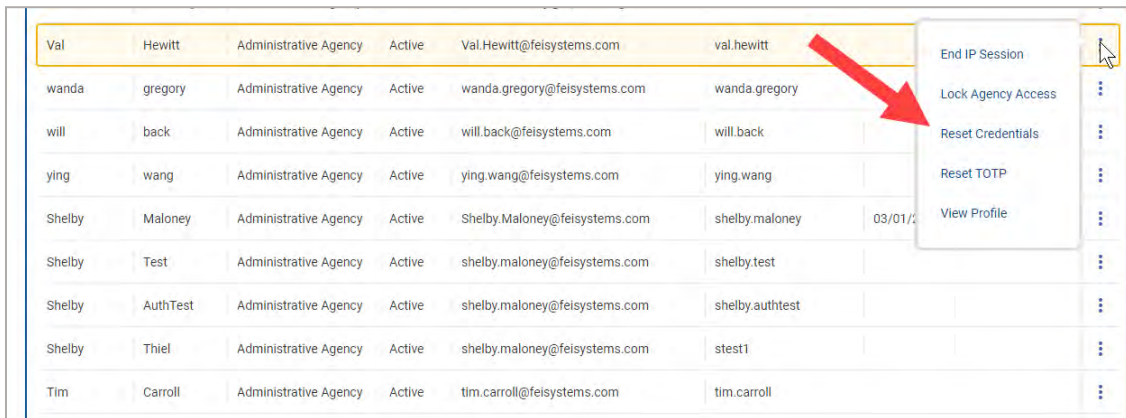
There are two (2) options available to resolve this issue.



**Note:** When resetting credentials, the staff member will receive an email containing a link to reset their credentials. Please note this link will remain active for 24 hours. If the staff member is unable to reset their credentials within that timeframe, they will need their credentials reset again.

### 5.2.2.1 Option 1: Staff Members List

- 8. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **Reset Credentials**.



### 5.2.2.2 Option 2: Staff Member Profile

- 9. On the **Staff Members** list, locate the staff member, point to the pencil icon and then click **View Profile**.

Val	Hewitt	Administrative Agency	Active	Val.Hewitt@feisystems.com	val.hewitt				End IP Session
wanda	gregory	Administrative Agency	Active	wanda.gregory@feisystems.com	wanda.gregory				Lock Agency Access
will	back	Administrative Agency	Active	will.back@feisystems.com	will.back				Reset Credentials
ying	wang	Administrative Agency	Active	ying.wang@feisystems.com	ying.wang				Reset TOTP
Shelby	Maloney	Administrative Agency	Active	Shelby.Maloney@feisystems.com	shelby.maloney	03/01/2			View Profile
Shelby	Test	Administrative Agency	Active	shelby.maloney@feisystems.com	shelby.test				
Shelby	AuthTest	Administrative Agency	Active	shelby.maloney@feisystems.com	shelby.authtest				
Shelby	Thiel	Administrative Agency	Active	shelby.maloney@feisystems.com	stest1				
Tim	Carroll	Administrative Agency	Active	tim.carroll@feisystems.com	tim.carroll				

10. Click **Edit**.

The screenshot shows the 'Staff Member Workspace' interface. At the top right, there is a toolbar with an 'Edit' button (pencil icon) highlighted by a red arrow. Below the toolbar, the profile of 'STAFFMEMBER, Joe' is displayed, including a profile picture with initials 'JS' and fields for 'Male' and 'Date of Birth'. To the right of the profile, there is a list of 'Additional Items' such as 'Define Employment Profile', 'Manage Accounts and Roles', etc.

11. In the User Account panel, click **Reset Credentials**.

The screenshot shows the 'User Account' panel for user 'val.hewitt'. The 'User ID' is 'val.hewitt'. There are three buttons: 'Disable', 'Reset Credentials', and 'Reset TOTP'. The 'Reset Credentials' button is highlighted with a red arrow. Below this, there is a section for 'IBHRS UAT' with buttons for 'End IP Session' and 'Lock Agency Access'. Under 'System Roles', 'WITS Administrator' is listed. Under 'Agency Roles', 'Agency Administrator' is listed. A '+ Manage roles' link is also present.

12. Click **Done Editing**.

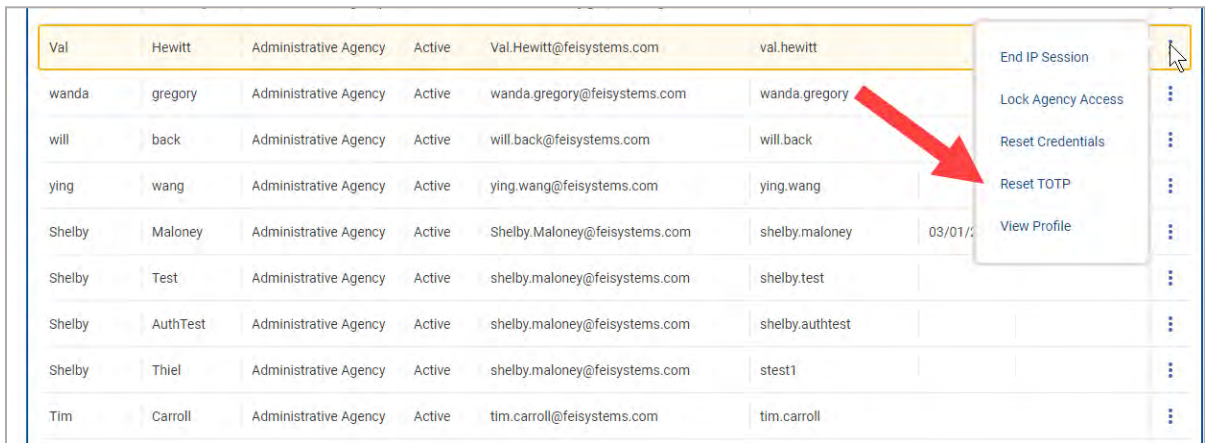
The screenshot shows the 'Staff Member Workspace' interface after editing. The 'Done Editing' button (checkmark icon) in the top right toolbar is highlighted with a red arrow. The rest of the interface, including the profile section, remains visible.

### 5.2.3 Use Case: Reset TOTP

**Note:** When resetting credentials, the staff member will receive an email containing a link to reset their credentials. Please note this link will remain active for 24 hours. If the staff member is unable to reset their credentials within that timeframe, they will need their credentials reset again.

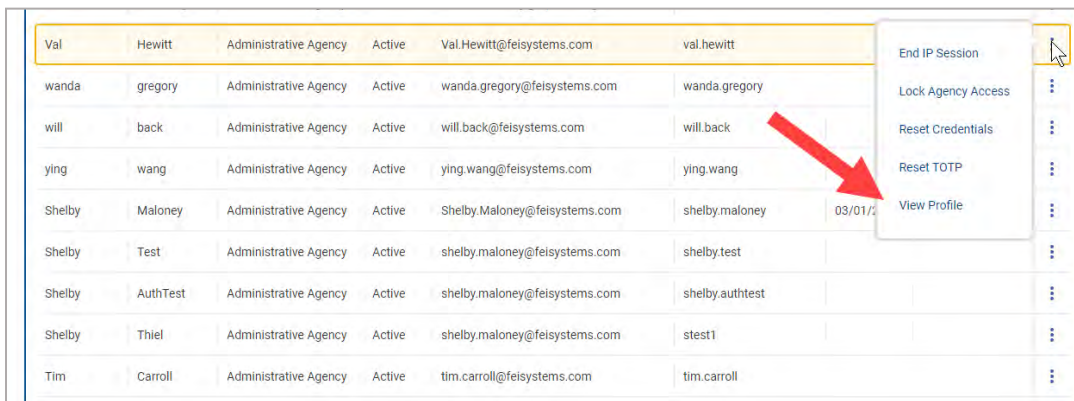
#### 5.2.3.1 Option 1: Staff Members List

13. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **Reset TOTP**.

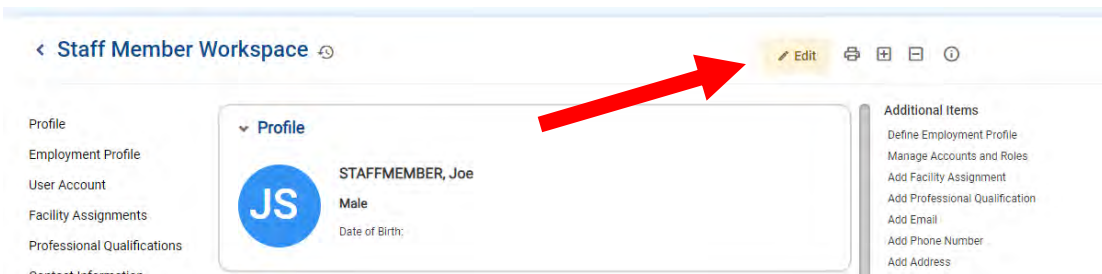


#### 5.2.3.2 Option 2: Staff Member Profile

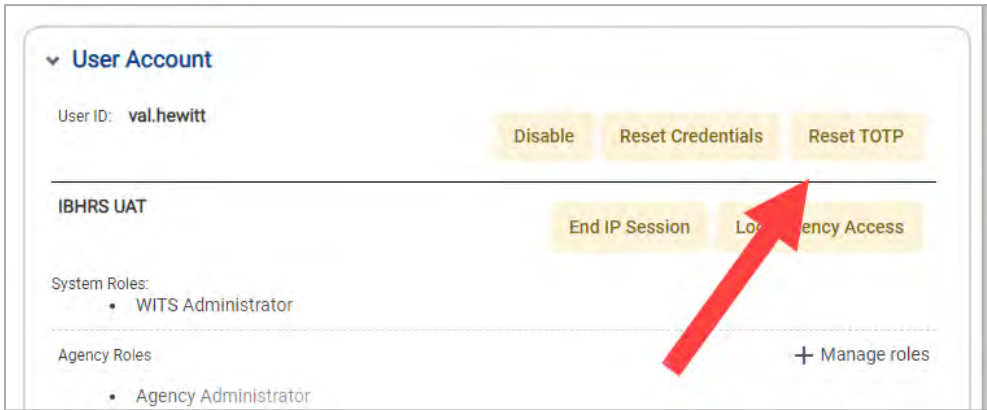
14. On the **Staff Members** list, locate the staff member, point to the pencil icon and then click **View Profile**.



15. Click **Edit**.



16. In the User Account panel, click **Reset Credentials**.



17. Click **Done Editing**.

