

Client Management (CL)

CL: Manage Client Information Process				
Item	Details			
Description	The Manage Client Information business process is responsible for managing all operational aspects of agency client data, which is the source of comprehensive information about applicants and clients, and their interactions with the state agency. The client database includes demographic, financial, socio-economic, treatment, service, health status, and outcomes information. Business processes that generate applicant or client information send requests to the client database to add, delete, or change this information. The client database provides access to client records to internal and external users.			
MITA Reference	Source Process Name: <i>Manage Member Information</i> Source Process Business Area: <i>Member Management</i> References: Part 1 Appendix C, Business Process Model Details Part 1 Appendix D, Business Process Capability Matrix Details http://www.cms.hhs.gov/MedicaidInfoTechArch/04_MITAFramework.asp			
Sample Data	Client demographic, financial, socioeconomic, treatment, service, health status, and outcomes information Referral and placement information	Client communications history Services requested and provided Any interactions related to any client grievance/appeal		
CL: Manage Client Information: Maturity Levels				
Level 1	Level 2	Level 3	Level 4	Level 5
Description				
The business process is primarily designed to serve State BH programs and meet Federal reporting requirements. The process uses primarily paper/phone/fax based processing and some proprietary internal systems, using nonstandard formats and data. The process is inconsistent in the application of the rules, data reporting, and response timing. Data is usually shared on a scheduled or ad hoc basis. This Level complies with agency requirements.	The business process is extended by “work-arounds” to meet the needs of providers and other programs. The process is increasingly automated, incorporating Web interfaces with providers/contractors, basic business rules, and enhanced consistency of responses and timing. Formats and data are standardized within the state. Cases are received and responded to electronically. This Level includes additional data and quality edits.	The process has virtual access to client administrative and clinical records; self adjusting business rules; and uses some clinical data to improve monitoring. Data and formats are standardized nationally. Cross agency collaboration results in a one-stop shop, with shared processes for some steps. Interfaces use BH-MITA standardized data and are compatible with Medicaid MITA. At this Level data is standardized against HL7 RIM.	Client information is accessible to any authorized party through HIEs statewide. Pointers to selected clinical information link it to other client and provider/contractor data to allow ongoing monitoring and quality control. Client specific clinical data is accessible electronically. This Level adds clinical data.	Client information is federated with HIEs nationally so that any stakeholder can access or request client administrative and clinical information to the extent authorized anywhere in the country. This Level adds nationwide technical interoperability.

VA As Is				
VA To Be				
Automation				
Level 1	Level 2	Level 3	Level 4	Level 5
All/mostly paper	Internal processes mostly automated	Internal agency processes/interfaces mostly automated	External agency processes/interfaces mostly automated	Non-state entity processes/interfaces mostly automated
VA As Is				
VA To Be				
Standards				
Level 1	Level 2	Level 3	Level 4	Level 5
Use few or no national standards	Internal processes use national standards	Internal agency processes/interfaces mostly use national standards	External agency processes/interfaces mostly use national standards	Non-state entity processes/interfaces mostly use national standards
VA As Is				
VA To Be				
Cross Coordination				
Level 1	Level 2	Level 3	Level 4	Level 5
Little/no coordination across processes or with other programs	Internal agency operational processes coordinated	Internal agency program processes coordinated	External agency program and operational processes coordinated	Non-state entity program and operational processes coordinated
VA As Is				
VA To Be				
Client Data				
Level 1	Level 2	Level 3	Level 4	Level 5
Little/no access to client specific data	Internal processes have access to client specific data	Internal agency processes have access to client specific data	External agency processes have access to client specific data	Non-state entity processes have access to client specific data
VA As Is				
VA To Be				
Interoperability				
Level 1	Level 2	Level 3	Level 4	Level 5
None	Limited interoperability internally or limited to claims processing systems	Interoperability with internal agency systems other than claims processing	Interoperability with external agency systems other than claims processing	Interoperability with non-state entity systems
VA As Is				
VA To Be				