



FEI Systems

# Iowa Behavioral Health Reporting System (IBHRS)

## End User Guide

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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.

**Iowa Behavioral Health Reporting System - UAT** 2021.04.0-IBHRS-Phase-1A.20210510.1

Administration Configuration **Submission** Reports Data Entry Extracts ? kory.schnoor Logout

< Back **Submission**

Upload Export Jobs Search Refresh

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.

**Standard - Test** 2021.04.0-IBHRS-Phase-1A.20210427.1

Administration Configuration **Submission** Reports Data Entry Extracts ? vhwitt Logout

< Back **Submission**

Upload Export Jobs Search Refresh

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:

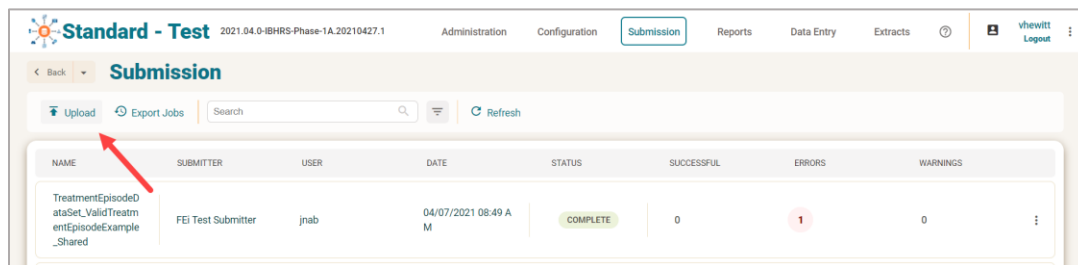
- ProviderDataSet\_20180215083045.xml
- ClientDataSet\_20180215083045.xml
- ClientDataSet\_20180222091530.xml

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**.

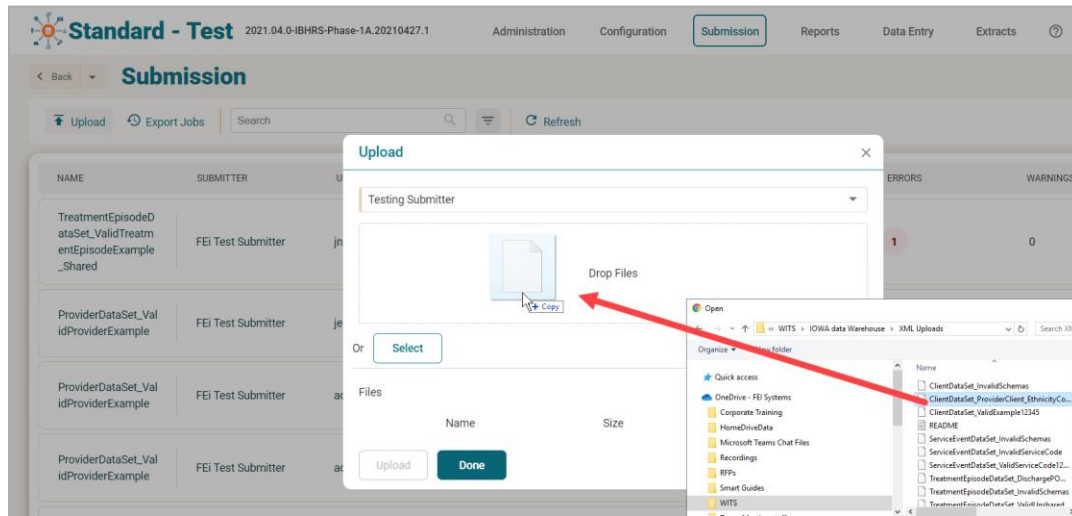
### 2.2.3.1 Option 1: Drop Files

- 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.



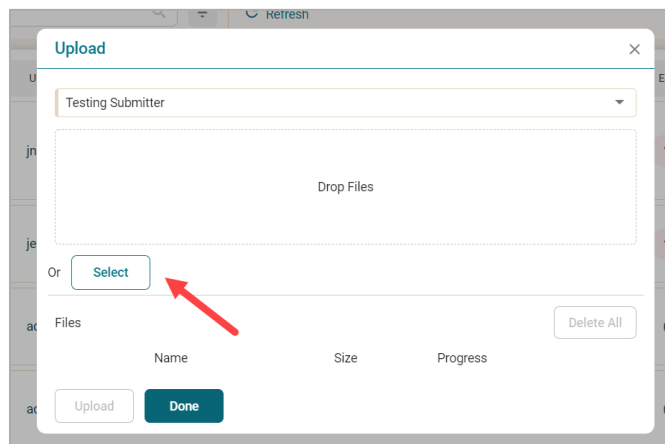
**i** **Tip:** To select multiple files, press the **Ctrl** key and click each file.

c. Continue to **Step 4**.

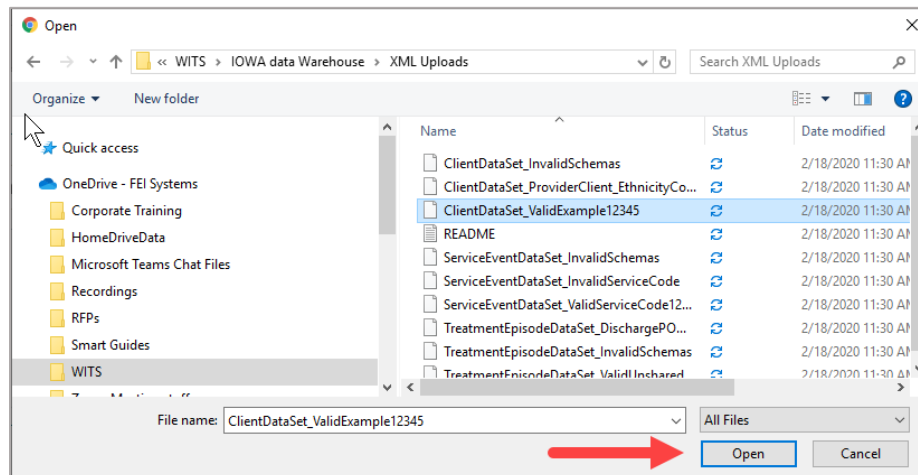


### 2.2.3.2 Option 2: Select Files

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

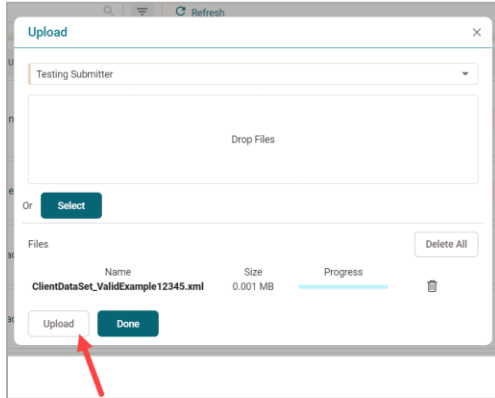


b. Select your file(s) and click **Open**.




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

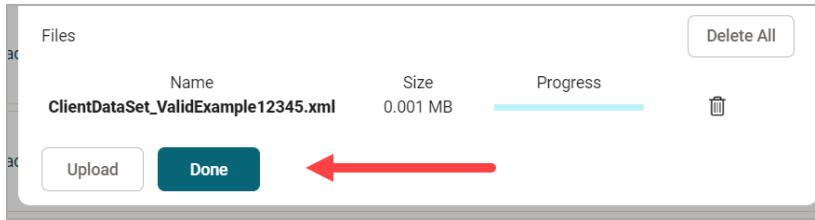
- When your selected files are displayed in the Files section, click **Upload**. This will initiate the Job to begin processing the file(s).



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

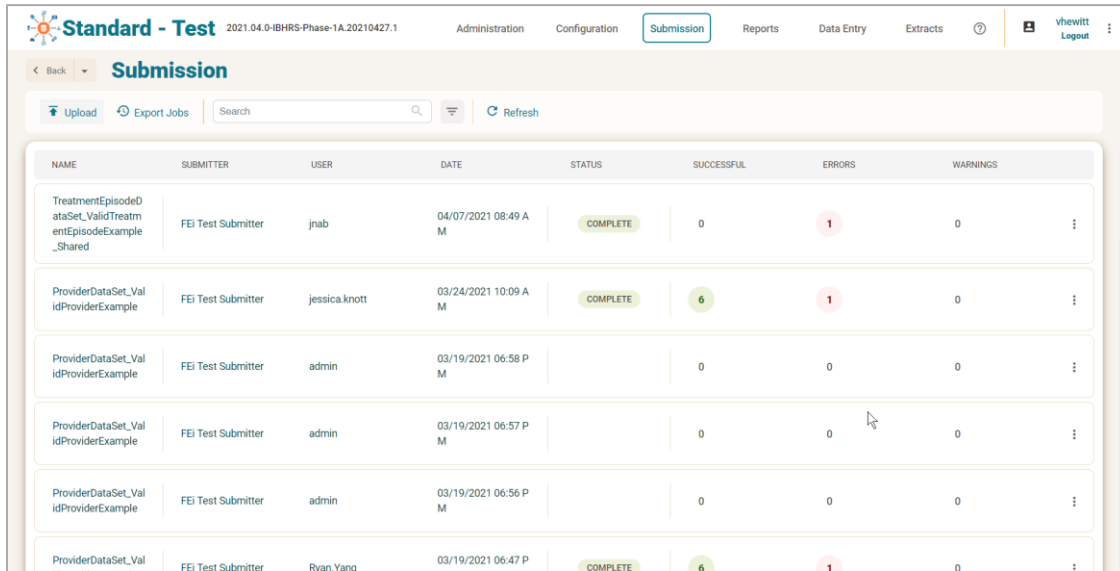
Name	Size	Progress	
ClientDataSet_ValidExample12345.xml	0.001 MB	<div style="width: 100%;"></div>	

- 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.

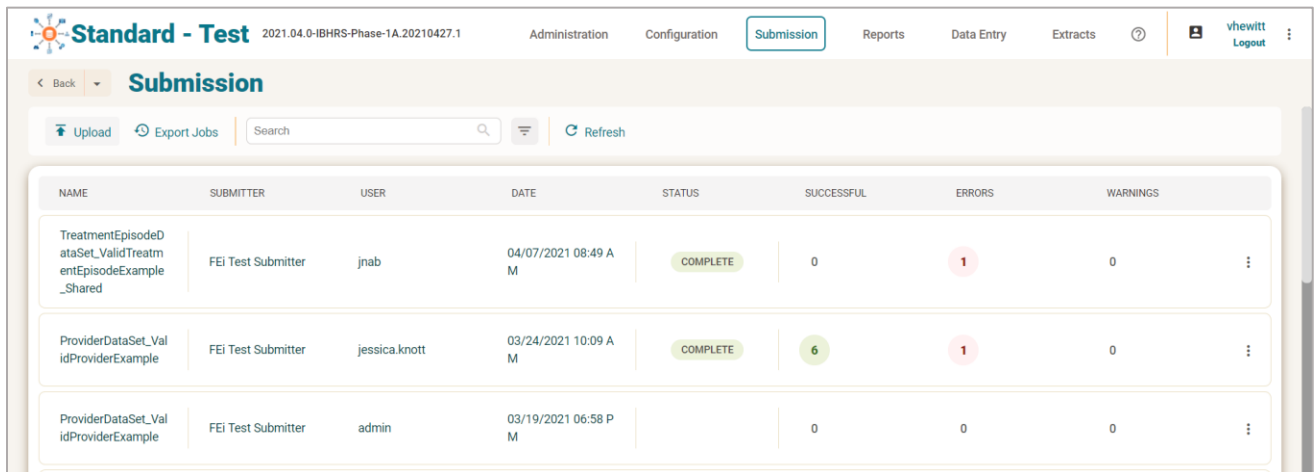


2. Continue to upload files as needed.
3. After all files are uploaded, check the Error statuses for each file submitted.

## 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.

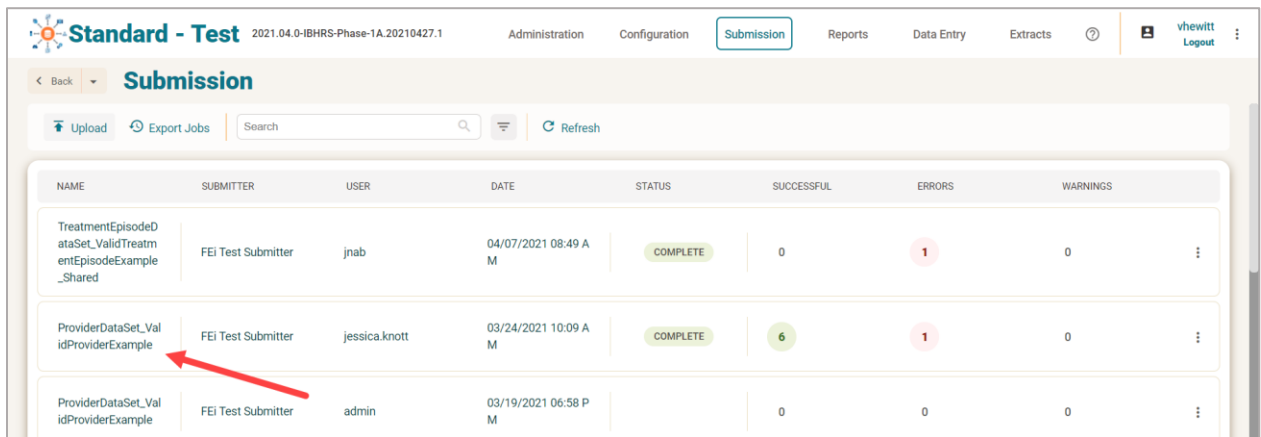
Column	Description
Date	Displays the date and time when the file was uploaded.
Status	Displays the status of the file uploaded. The status will change as the job is processing.
Successful	Displays the number of successful records within the Job.
Errors	Displays the number of errors associated within 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.



## 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.

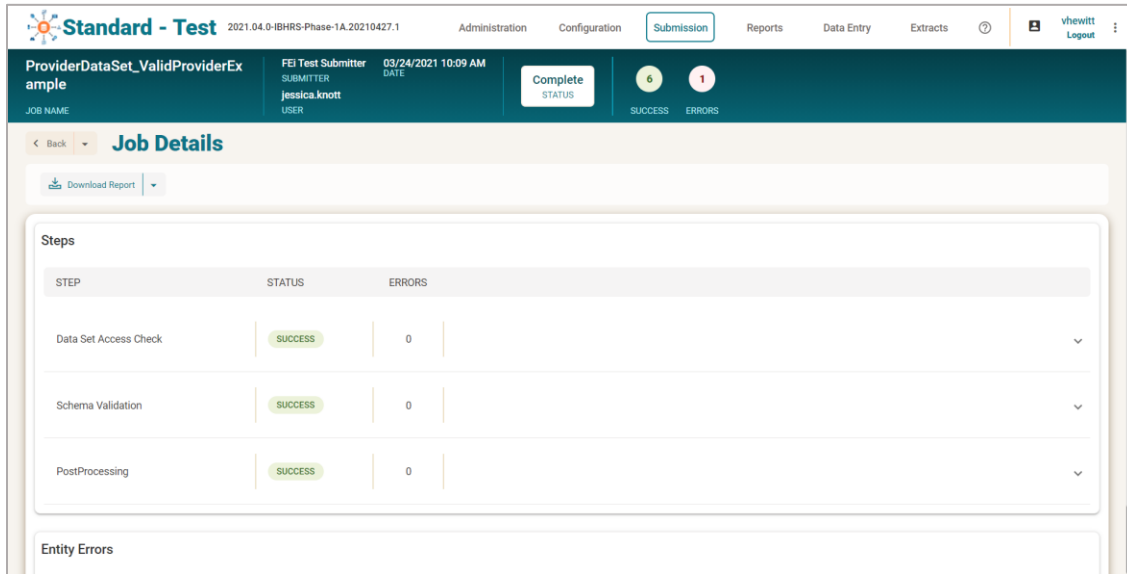
Expand the entity errors/warning rows to view details for each error, including information about the entity involved. Errors are organized in a list with sortable columns displaying the **Source**, **Type**, and **Message**.

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.

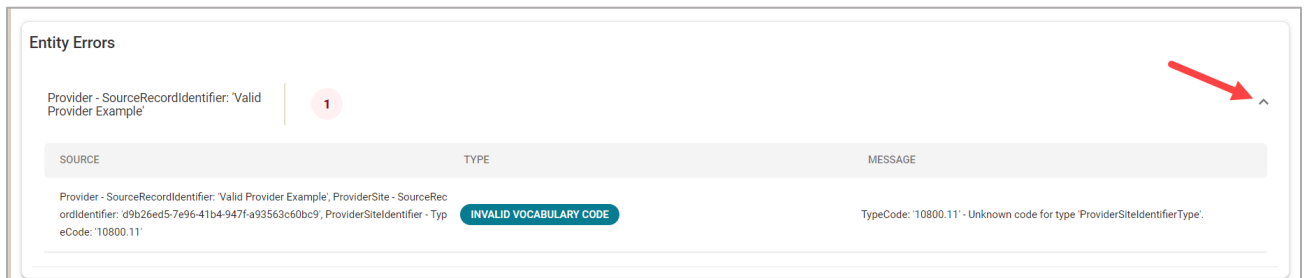
## 2.2.7 How to Correct Job Errors

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.



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.

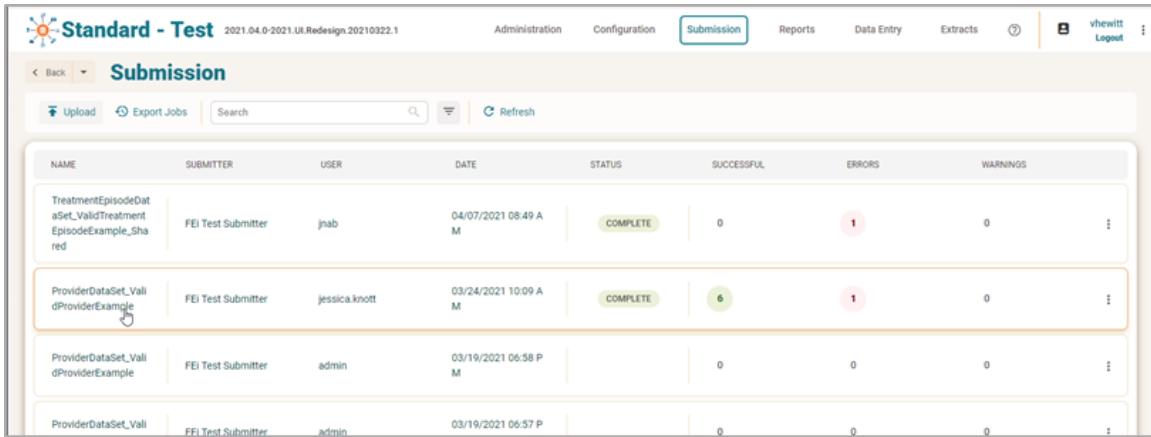


3. Once the issue is fixed within the source system, resubmit the file.
4. Repeat the steps above to confirm all errors have been corrected.

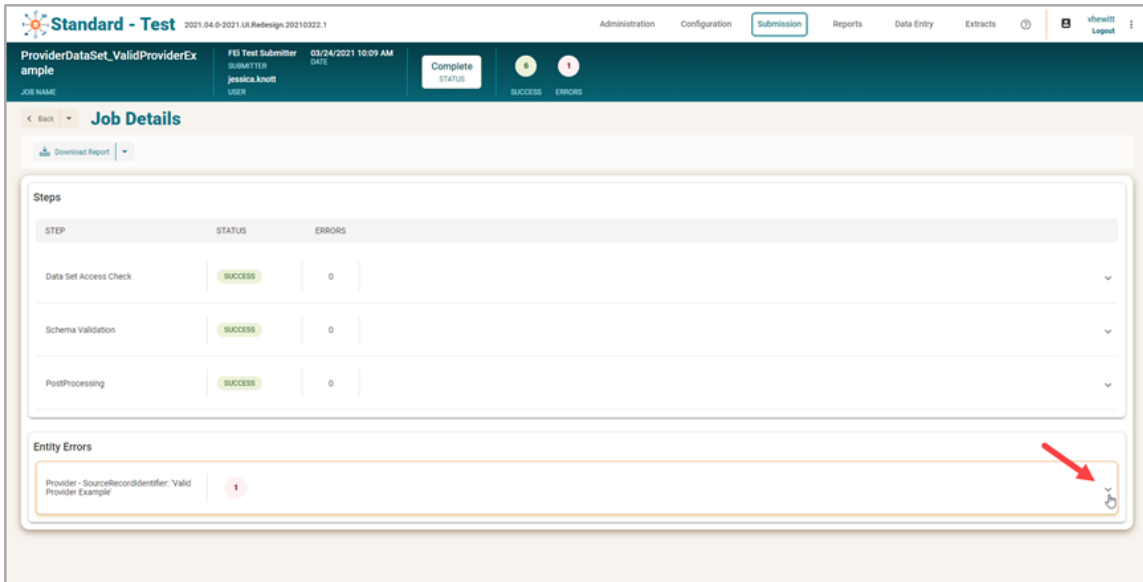
## 2.2.8 Vocabulary Mapping

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

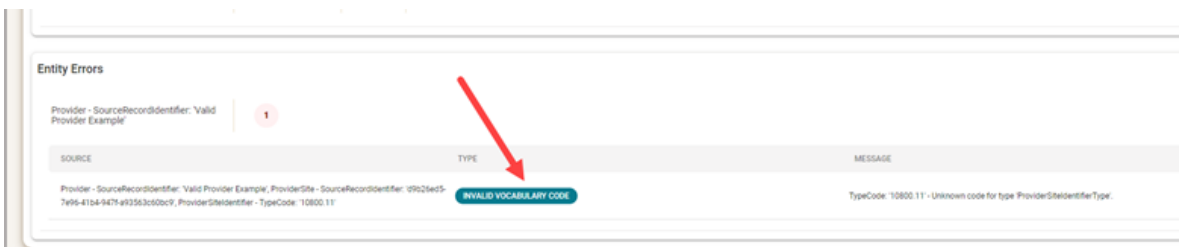
1. After submitting a file that shows errors, click on the file to open the job and review the errors.



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**.

**Add Vocabulary Mapping** [X]

Submitter Code  
10800.11

Vocabulary Code  
[Dropdown Menu]

- (2) Inventory of Behavioral Health S...
- (1) Inventory of Behavioral Health S...

**Add Vocabulary Mapping** [X]

Submitter Code  
10800.11

Vocabulary Code  
-BHS) Number for Mental Health (MH) facility

**Add** Cancel

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

Administration Configuration **Submission** Reports

**Job: ProviderDataSet\_20181001** Date: 10/02/2018 05:01 PM **Success: 9** **Warnings: 0** **Errors: 6**

Back Submitter: User Guide SE Status: Complete **Reports** **Reprocess Submission**

User: Ashley.Jones1

Steps

- Data Set Access Check **Status: Success** Errors: 0
- Schema Validation **Status: Success** Errors: 0



## 2.2.9 Download Data

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

The screenshot displays the 'Submission' page of the 'Standard - Test' application. The page header includes the application name, version (2021.04.0-IBHRS-Phase-1A.20210427.1), and navigation tabs for Administration, Configuration, Submission, Reports, Data Entry, and Extracts. The user 'vhevitt' is logged in. The main content area features a 'Submission' section with a search bar and a 'Refresh' button. Below this is a table of job submissions:

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

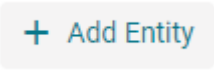
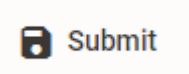




A dropdown menu is open over the 'Download Report' button for the second row, showing options for PDF and Excel.

## 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 	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.

 **Care Statures**  
1 Sub entity with errors or warnings.

 **Errors**  
In order to submit Care Status data, the Provider Site record should reference a Provider Site whose License Provider Site is active.

**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.

**Performance Outcome Measure Associations**  
1 Sub entity with errors or warnings.

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



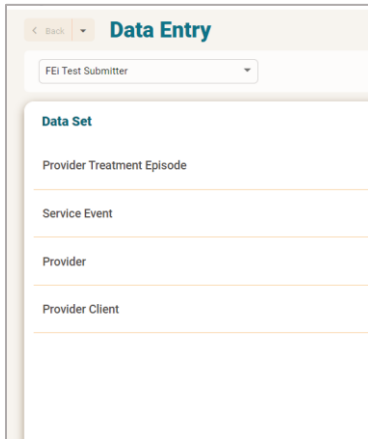
Status Date is required  
Status Date must be greater than or equal to the Treatment Episode Open Date.

Program Area

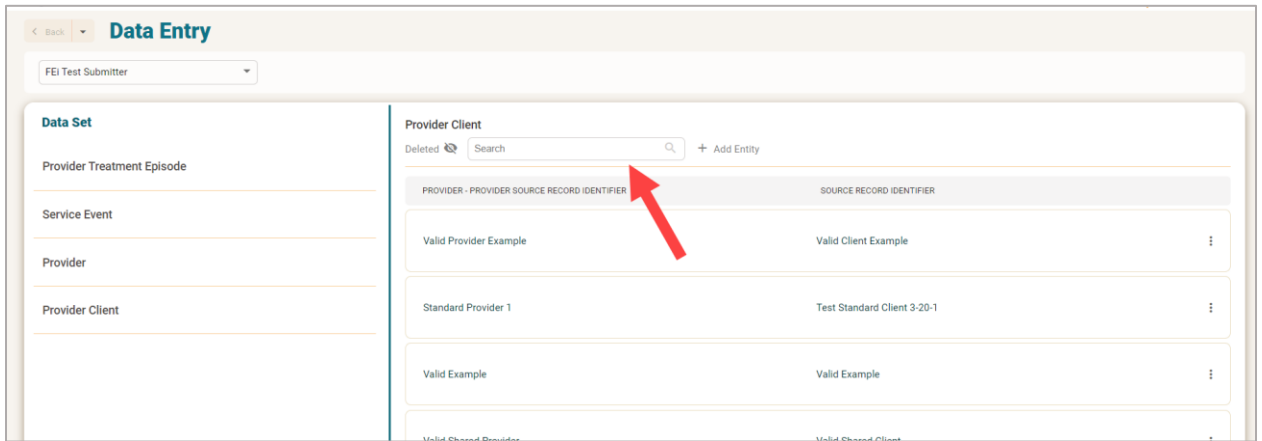
### 2.3.1 Enter Provider Client Data

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

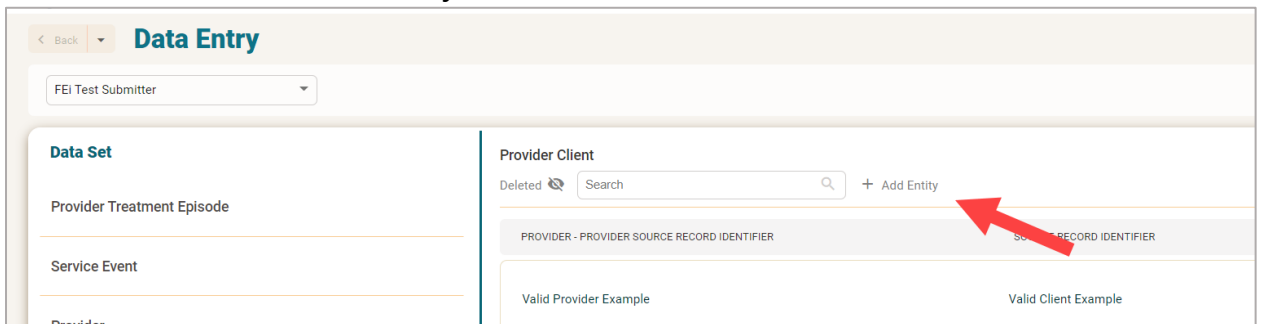
1. Click **Provider Client** on the Data Entry Screen.



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



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



- 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.

PROVIDER - PROVIDER SOURCE RECORD IDENTIFIER	SOURCE RECORD IDENTIFIER	
Valid Provider Example	Valid Client Example	⋮
Standard Provider 1	Test Standard Client 3-20-1	⋮
Valid Example	Valid Example	⋮

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**.

The screenshot shows the 'Data Entry' page with a dropdown menu set to 'FEI Test Submitter'. On the left, a 'Data Set' sidebar lists 'Provider Treatment Episode', 'Service Event', 'Provider', and 'Provider Client'. The main area is titled 'Provider Client' and includes a search bar and an '+ Add Entity' button. Below is a table with two columns: 'PROVIDER - PROVIDER SOURCE RECORD IDENTIFIER' and 'SOURCE RECORD IDENTIFIER'. The table contains two rows: one for 'Valid Provider Example' with 'Valid Client Example' and another for 'Standard Provider 1' with 'Test Standard Client 3-20-1'. A red arrow points to the 'View Details' button in the context menu for the 'Valid Client Example' entry.

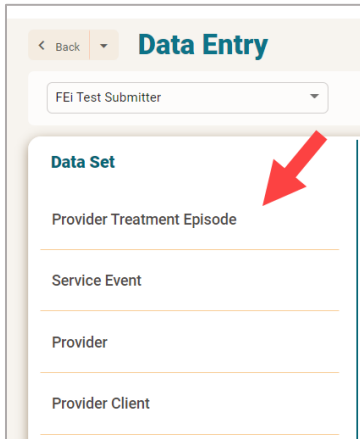
Step 4. Make your edits and click **Submit** when changes are complete.

The screenshot shows the 'Data Entry Details' page for a 'Provider Client'. The page title is 'Data Entry Details' and the client name is 'FEI Test Submitter'. A 'Submit' button is located in the top right corner. A red arrow points to this button. Below the header is a 'Profile' section with two input fields: 'Source Record Identifier' containing 'Valid Client Example' and 'Birth Date' containing '1/15/1991'.

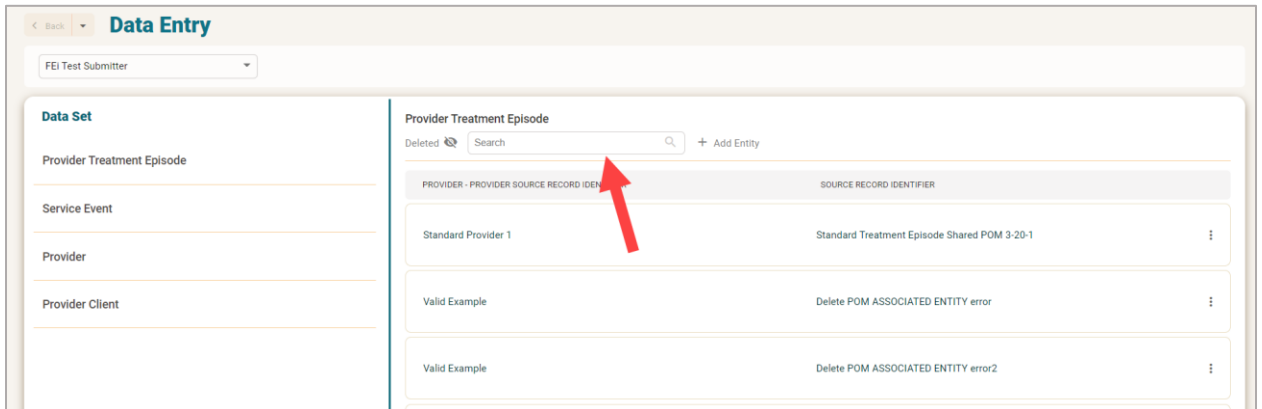
## 2.3.2 Enter Provider Treatment Data

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

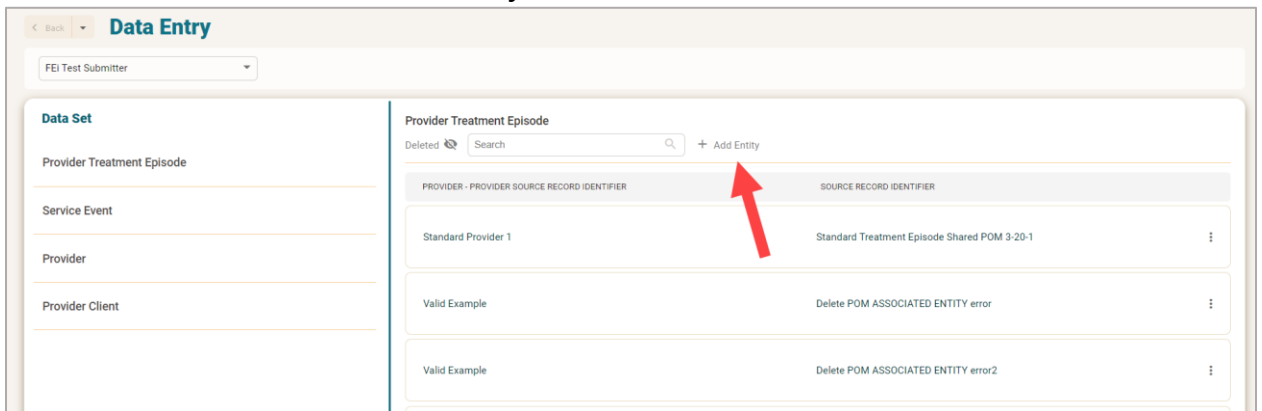
1. Click on Provider Treatment Episode on the Data Entry Screen.



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, Intravenous 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 a 'Provider Treatment Episode'. The 'Profile' section includes: Source Record Identifier, Residence County, HIV Positive, D U I 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.

The screenshot shows a dropdown menu for 'Provider' with the number '1740' selected. A search icon is on the right side of the dropdown, and a refresh icon is at the bottom right.

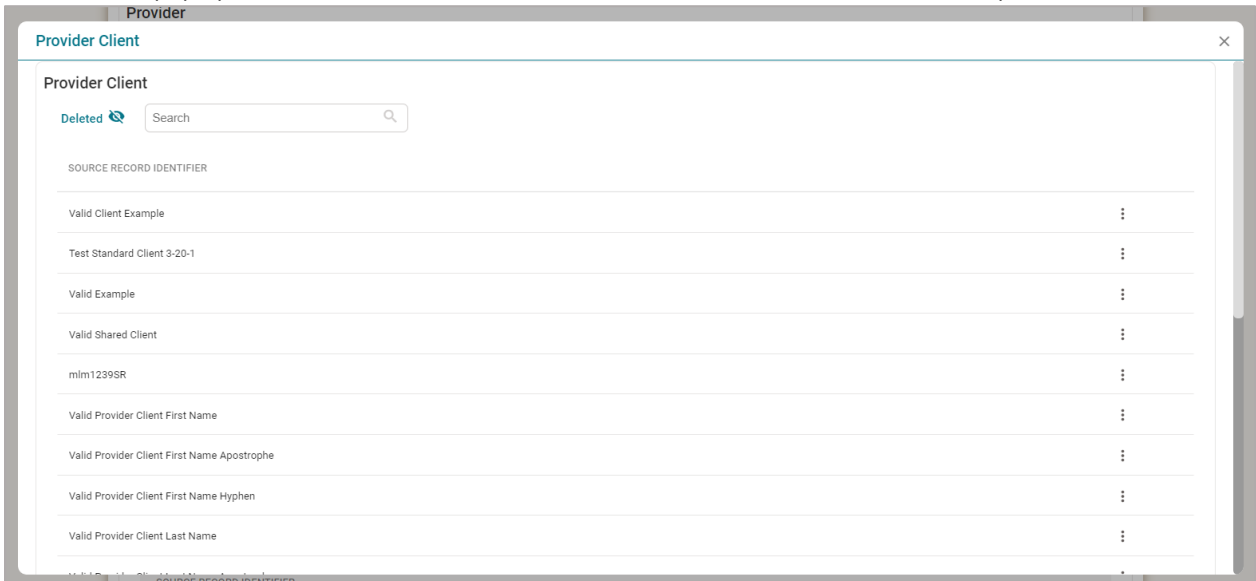
- 7. Scroll down and click the client field to select.





Provider Client

Provider Client  

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

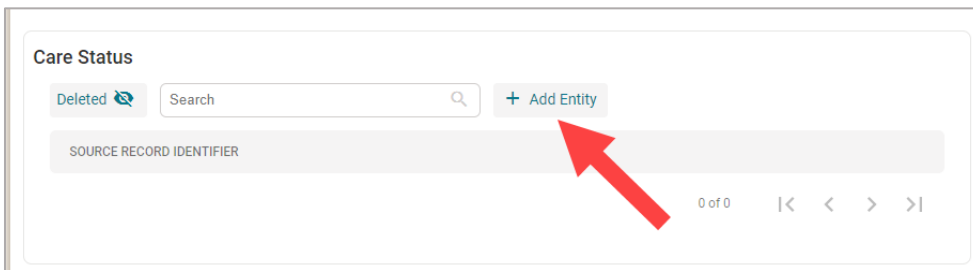


Provider Client



Deleted  Search  

SOURCE RECORD IDENTIFIER	
Valid Client Example	⋮
Test Standard Client 3-20-1	⋮
Valid Example	⋮
Valid Shared Client	⋮
mim1239SR	⋮
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.



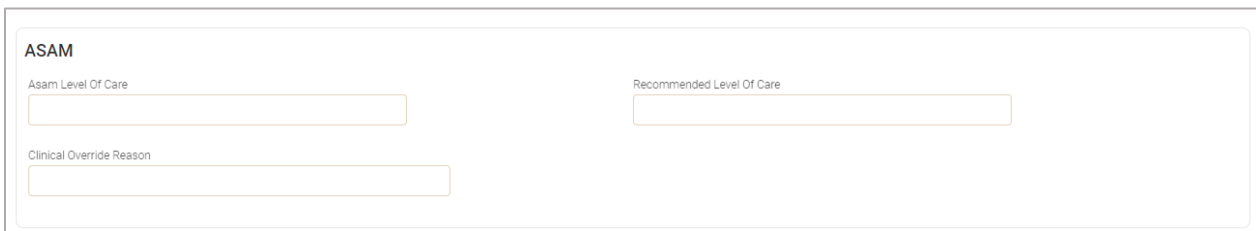
Care Status

Deleted  Search   **+ Add Entity**

SOURCE RECORD IDENTIFIER

0 of 0 |< < > >|

10. Fill out the Care Status information.



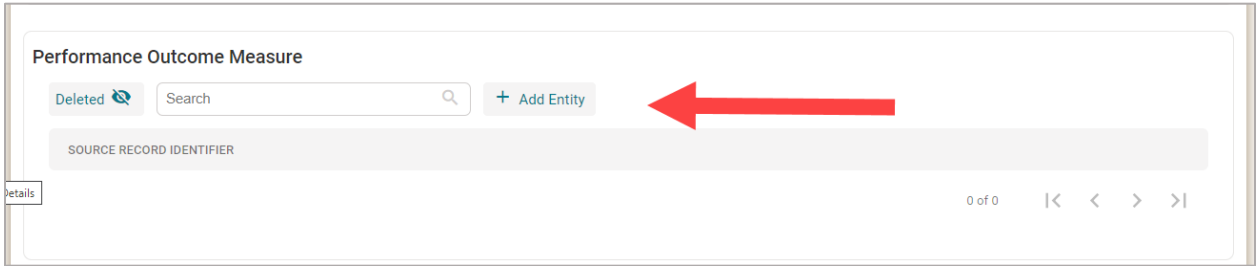
ASAM

Asam Level Of Care

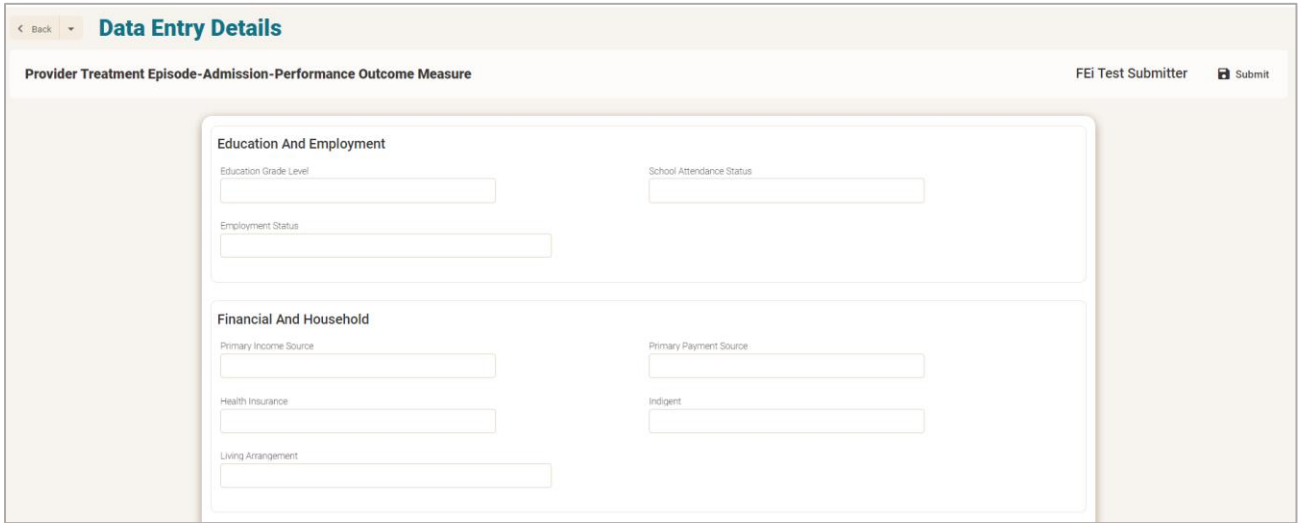
Recommended Level Of Care

Clinical Override Reason

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

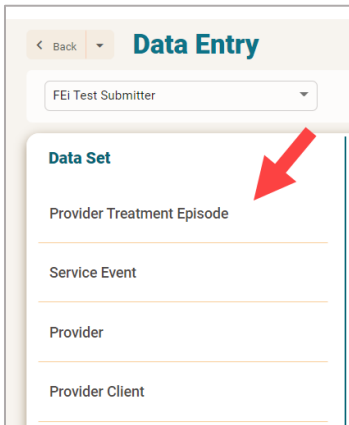


12. On the Performance Outcome measure page, enter the information, and click the **Submit** button.

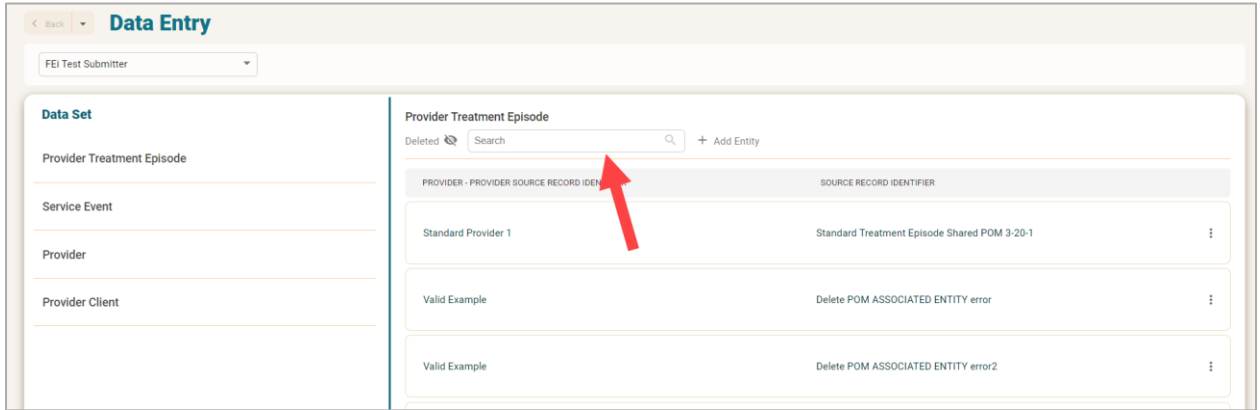


### 2.3.2.1 Edit Provider Treatment Information

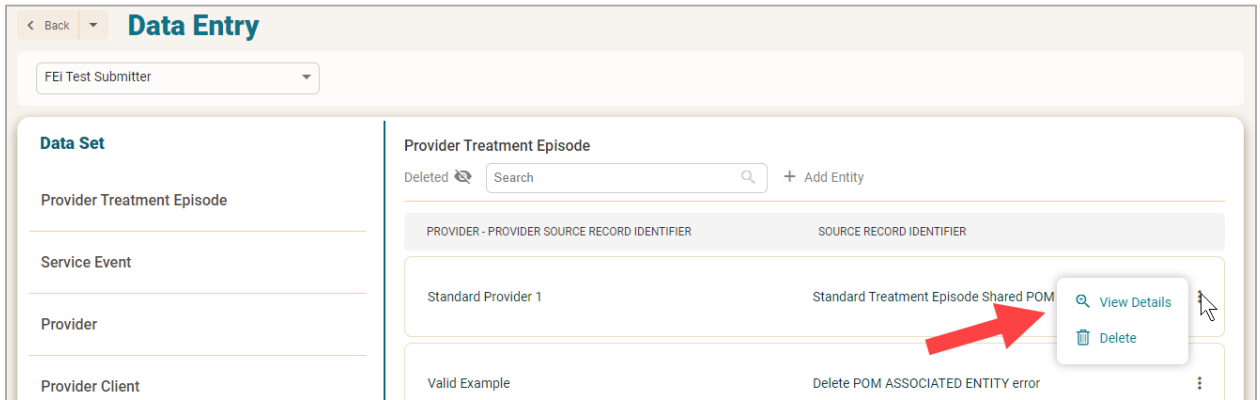
1. Click **Provider Treatment Episode** on the left side panel.



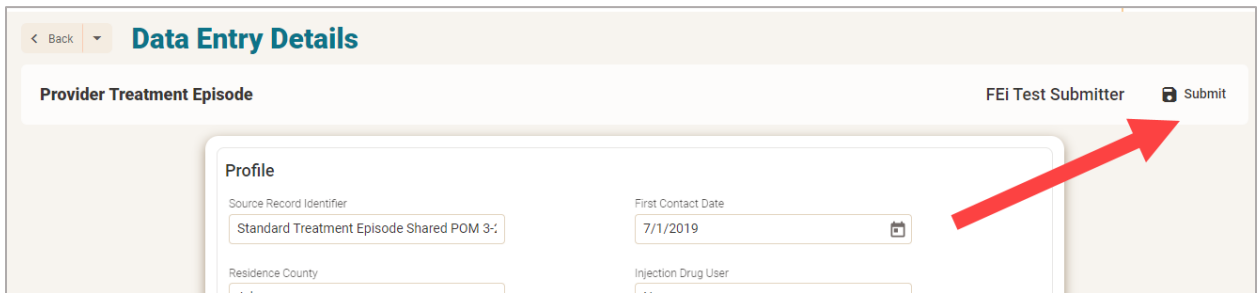
2. Search for the Provider Treatment Episode Record.



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**.



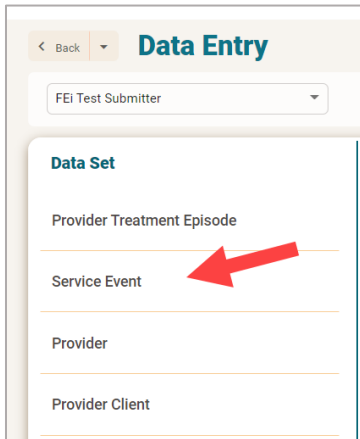
4. Make Edits and click **Submit** when changes are complete.



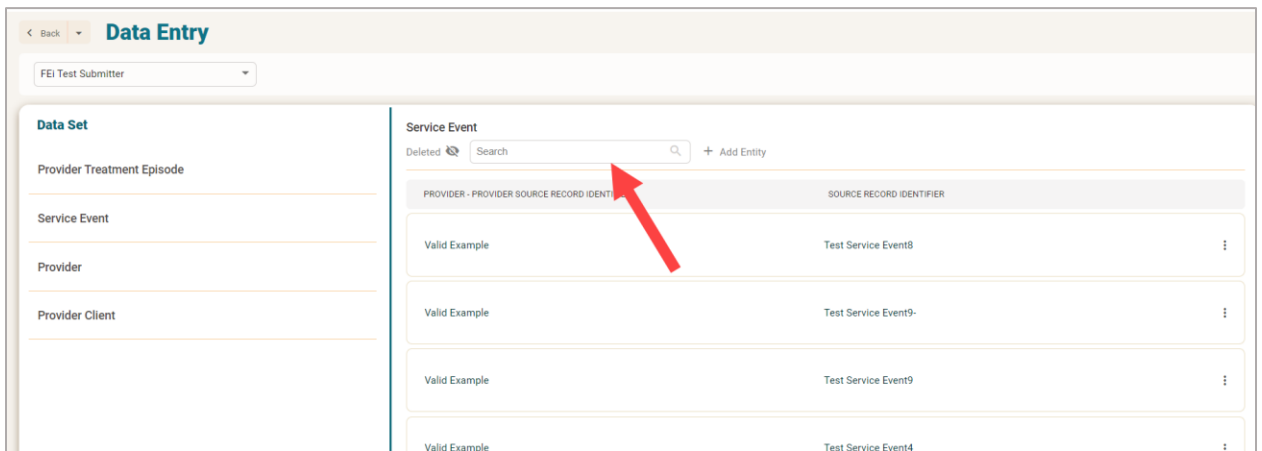
### 2.3.3 Enter Service Event Data

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

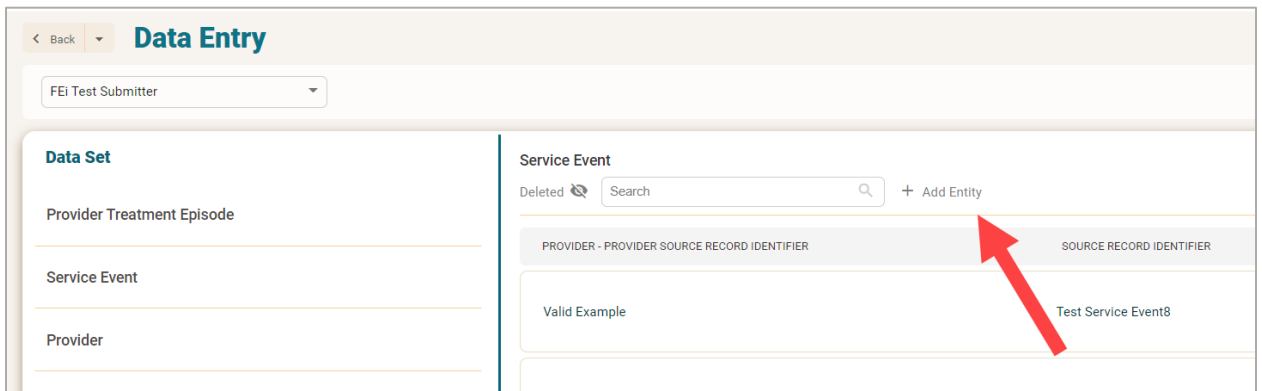
1. Click **Service Event** on the Data Entry Screen.



2. Search for the service event.



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



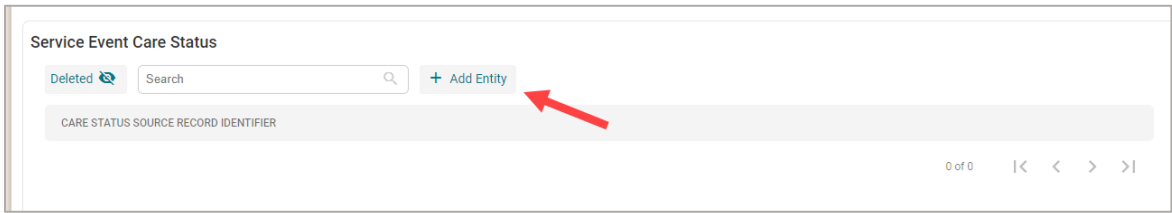
- On the Service Event Screen, Enter the profile and provider information

- Search to connect the Provider Treatment Episode.

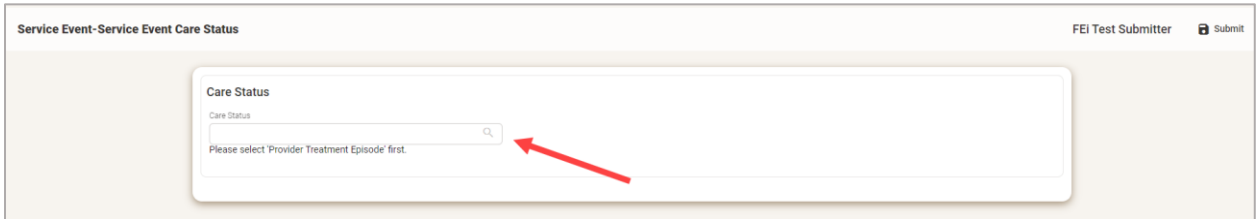
- Click Add Entity to add Service Event Procedure Modifier.

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

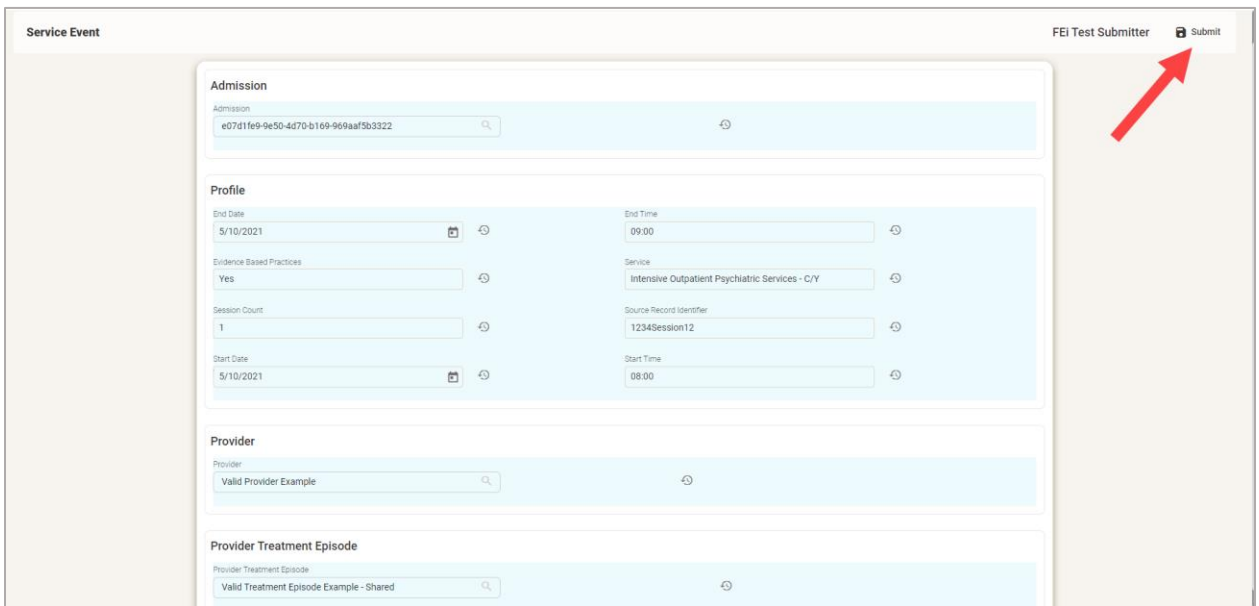
- Click Add Entity to add Service Event Care Status.



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

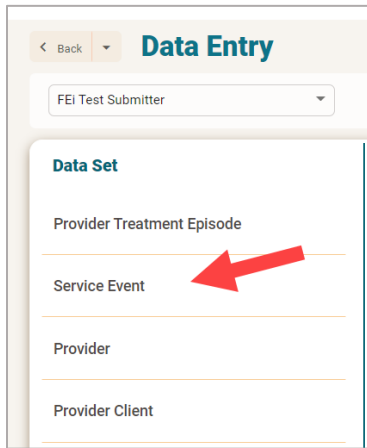


10. Once all fields are completed, Click the Submit button to submit the record.

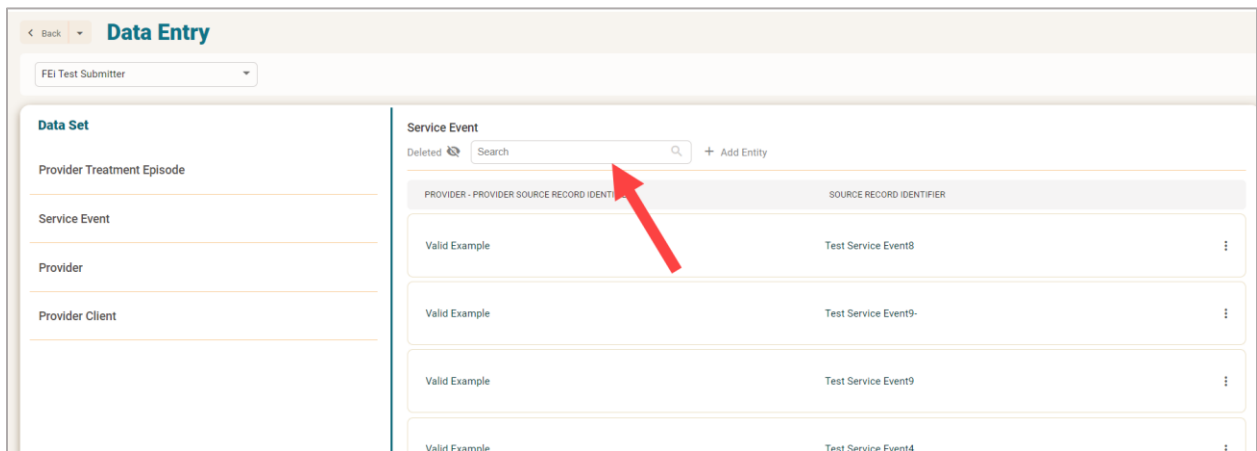


### 2.3.3.1 Edit Service Event Information

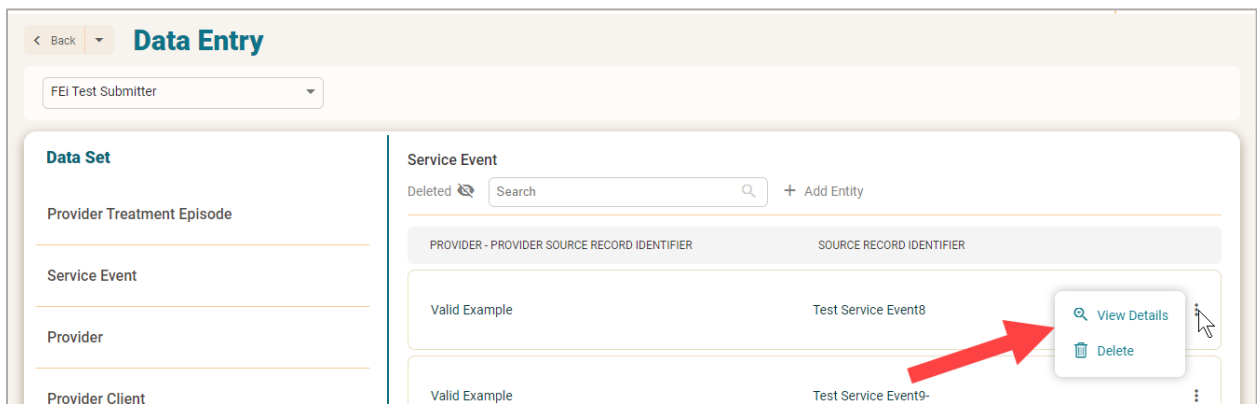
Step 1: Click Service Event on the left side panel.



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.



## 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.

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

- 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 contains a "File Name" input field with "Example\_837P\_20210131.txt", an "Upload Date" field with "1/7/2021", and a "Status" dropdown menu set to "Queued". There are "Clear" and "Search" buttons. 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 filtered file list. 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. 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: 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 fields are 'Finish', 'Search', and 'Clear' buttons. The 'Errors (Export)' section has a table with columns for 'CODE' and 'MESSAGE'. The table contains one row with the code 'H837Processor' and the message '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 vertical sidebar menu with icons and labels for various system functions: Home Page, State Waitlist, Agency, Group List, Clinical Dashboard, Client List, System Administration, Reports, and Support Ticket. The main content area is titled 'H999 Management' and includes search filters for 'File Name' and 'Upload Date', along with 'Search' and 'Clear' buttons. Below the filters is a section titled 'H999 File List' with an 'Export' button. A table lists 999 files with columns for 'FILE NAME', 'UPLOAD DATE', and 'CREATED DATE'. The first row is highlighted in yellow, and a context menu is open over it, showing 'Profile' and 'Download' options. The table contains the following data:

FILE NAME	UPLOAD DATE	CREATED DATE
1234512_20191105133615_2345234-2.999		11/5/2019 12:36 PM
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 vertical sidebar menu with icons and labels for various system functions: Home Page, State Waitlist, Agency, Group List, Clinical Dashboard, Client List, System Administration, Reports, and Support Ticket. The main content area is titled "H835 Management" and includes search filters for File Name, Agency (set to "SA Provider"), Upload Date, and Status. Below the filters are "Search" and "Clear" buttons. The "H835 File List" table contains three rows of data. The first row is highlighted in yellow, and a context menu is open over it, showing "Profile" and "Download" options. The table columns are FILE NAME, UPLOADED DATE, and STATUS.

FILE NAME	UPLOADED DATE	STATUS
1234512_20191113131125_2345234-35.835	11/13/2019 12:11 PM	Processed
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

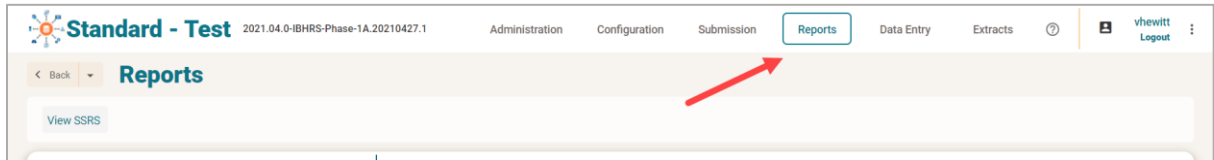
**Failed Records-** Providers can use this report to view the failed records in uploads in order to see what records need to be fixed to successfully upload. This report can be filtered by date range, error status, and data set type.

**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.

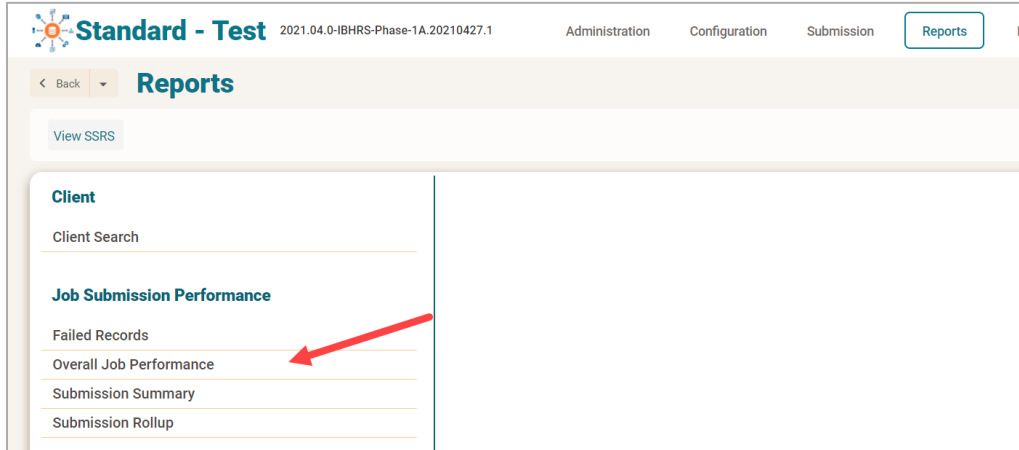
**Submission Summary-** This report will give a summary of all submission for a provider. It includes number of files, % without errors, Number of submitted records, number of successful records, number of failed records, and % of successful records. This report can be filtered by date range and provider.

### 4.1.1 How to run a report

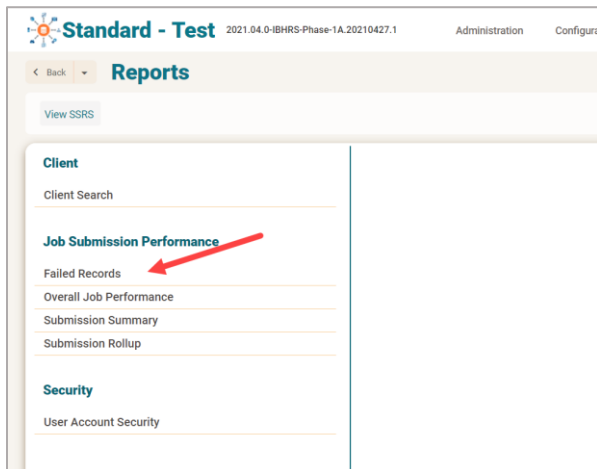
1. Log in to the IBHRS Portal.
2. Click the **Reports** tab. This will open the Reports screen.



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.



The screenshot shows the 'Reports' page with a sidebar on the left containing links for 'Client Search', 'Job Submission Performance' (with sub-links for 'Failed Records', 'Overall Job Performance', 'Submission Summary', and 'Submission Rollup'), and 'Security' (with a sub-link for 'User Account Security'). The main content area has a 'View SSRS' button at the top left. Below it is a form with several fields: 'Submitting Entity' (dropdown menu), 'Beginning Failure Created Date' (calendar icon and checkbox for NULL), 'Data Set Type' (dropdown menu), 'Error Status' (dropdown menu), 'Ending Failure Created Date' (calendar icon and checkbox for NULL), and 'Error Fix Timeframe In Days' (text input). A 'View Report' button is located on the right side of the form.

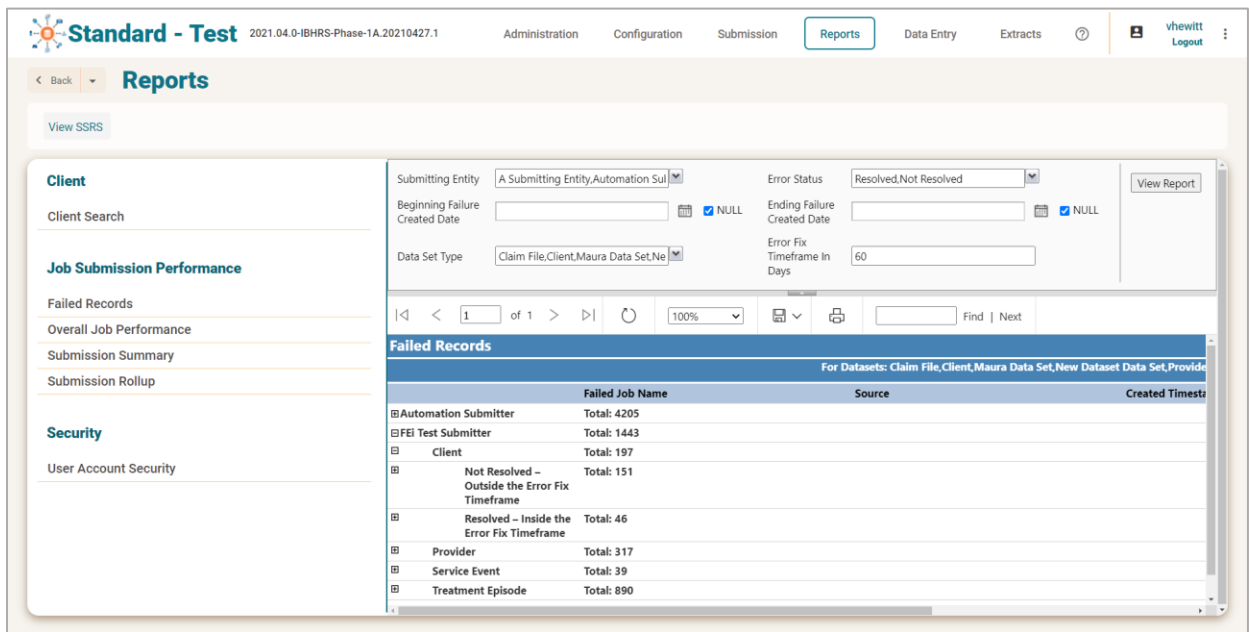
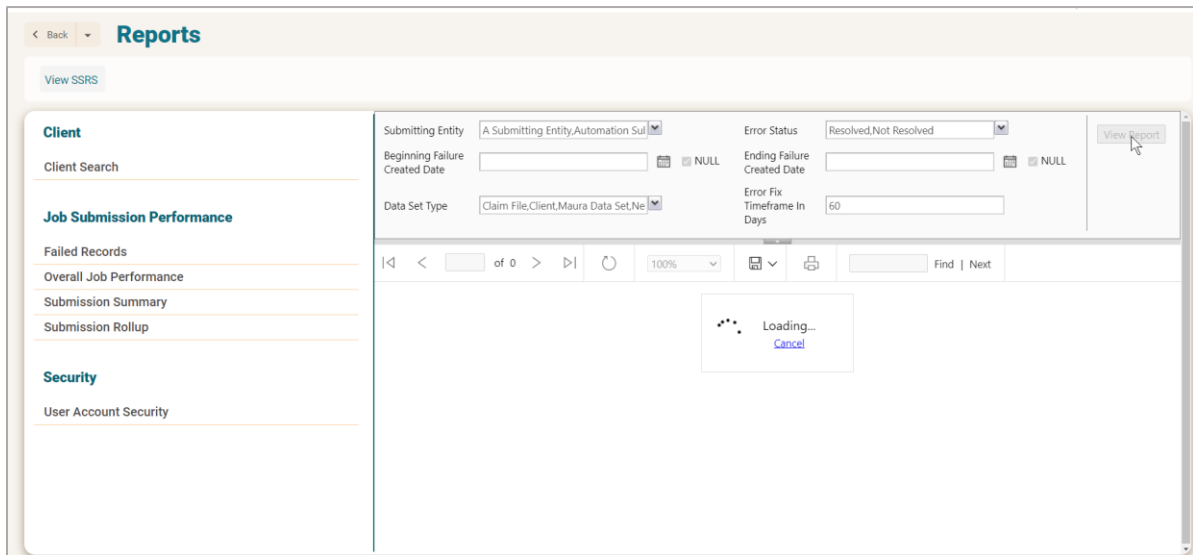
6. If the parameter fields are blank, enter or select values for each parameter. If the parameter fields have been pre-populated with values, modify those fields as needed.

This screenshot is similar to the previous one, but the 'Data Set Type' dropdown menu is open, showing a list of options: '(Select All)', 'Claim File', 'Client', 'Maura Data Set', 'New Dataset Data Set', 'Provider', 'Service Event', and 'Text'. A red arrow points to the 'Client' option in the list.

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

This is a close-up view of the 'View Report' button, which is highlighted with a red arrow. The button is located at the bottom right of the parameter selection form.

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	~100
Provider Licensing	~400

Data Set Error Counts

Category	Count
Client	~650
Provider	~100
Provider Licensing	~400

Overall Job Count vs Error Count

Date	Job Count	Error Count	Mov.Avg (ErrorCount)
8/16/2019	~100	~100	~100
8/19/2019	~100	~100	~100
8/20/2019	~100	~100	~100
9/5/2019	~100	~100	~100
9/9/2019	~800	~1400	~700
9/10/2019	~800	~1400	~700
12/8/2019	~100	~100	~100
12/9/2019	~100	~100	~100
12/13/2019	~100	~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 (-).

The screenshot shows the 'Standard - Test' Reports interface. On the left, there are navigation tabs for Client, Job Submission Performance, and Security. The main area contains filters for Submitting Entity, Beginning Failure Created Date, and Data Set Type. A 'Failed Records' table is displayed with the following data:

Failed Job Name	Total
Automation Submitter	4205
FEI Test Submitter	1443
Client	197

This screenshot is similar to the previous one but shows a different row selected in the 'Failed Records' table. The table data is as follows:

Failed Job Name	Total
Automation Submitter	4205
FEI Test Submitter	1443
Client	197
Not Resolved -	151

Uncheck "NULL" to select or enter a date.

This screenshot shows the 'Standard - Test' Reports interface with additional filters. The 'Error Status' dropdown is set to 'Resolved, Not Resolved' and the 'Error Fix Timeframe In Days' is set to 60. A red arrow points to the 'Error Status' dropdown.

## 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.


The screenshot displays the IBHRS UAT interface. On the left is a vertical navigation menu with icons and labels for various sections: Home Page, BHRS Reporting, Agency, Group List, Client List, System Administration, Reports, and Support Ticket. The 'Agency' section is expanded, showing a list of options including Agency Profile, Alliances, Contacts, Governance, Relationships, Announcements, Referrals, Removed Connections, Deleted Clients, GPRA Discharge, GPRA Follow-up, Facility List, DIRECT Setup, Staff Members (highlighted with a red arrow), Billing, and Contract Management. The main content area shows the 'Agency Search' section with a 'Domain' dropdown and 'Search' and 'Clear' buttons. Below this is the 'Agency List' section, which includes an 'Add New Agency Record' button and a table of agencies with columns for Name and Identifier. The table lists agencies such as '777 gambling treatment', 'A Ray of Hope Counseling', 'A1 Addictions', 'AAA Gambling Services', 'Abbey LLC', 'ABC1', 'ABC2', and 'Addiction Management Systems'.

#### 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").

**Staff Member Search** + Create New Staff Member

Search | Advanced Search

Search... Search 

Showing 1-32 of 32 Select Columns Select View Export Results

First Name	Last Name	Agency	Status	Email	Identifier	Start Date	Termination Date
Admin	User	Administrative Agency	Active	noreply@feisystems.com	admin		
System	User	Administrative Agency	Active	noreply@feisystems.com	system		
Pre-WITS Migration	Process	Administrative Agency	Active	rodney.conrad@feinfo.com	PProcess-105		
David	Webb	Administrative Agency	Active	david.webb@feisystems.com	dwebb		
SSRS	Adm	Administrative Agency	Active	Bo.Ling@feisystems.com	ssrsadm		
Amber	Riegel	Administrative Agency	Active	Amber.Riegel@feisystems.com	ariegel		
Andrew	Barden	Administrative Agency	Active	Andrew.Barden@feisystems.com	abarden		
Andre	radovanski	Administrative Agency	Active	andre.radovanski@feisystems.com	aradovanski		

**Table View**

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	⋮

- End IP Session
- Lock Agency Access
- Reset Credentials
- View Profile

**Panel View**

**< Staff Member Workspace** Edit

Profile

Employment Profile

User Account

Contact Information

Identifiers

**Profile**

AU

**USER, Admin**

Unknown

Date of Birth:

**Employment Profile**

Job Title:	Staff Member Type: <b>State Administrative Staff</b>	Employment Type:	Employment Date Range:
Full Time Equivalent:	Taxonomy Type:	Taxonomy Classification:	Taxonomy Specialization:

Relationships:

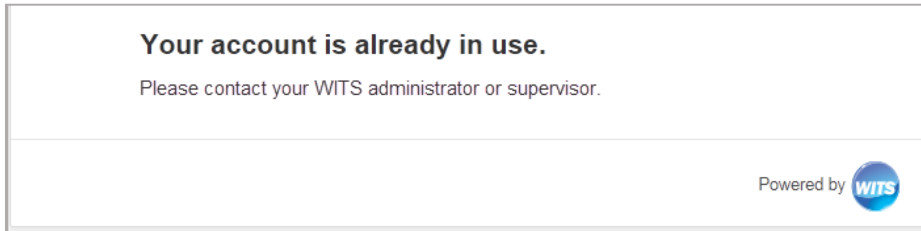
## 5.2 Troubleshooting Help for Staff Management

### 5.2.1 Use Case: Account in Use

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

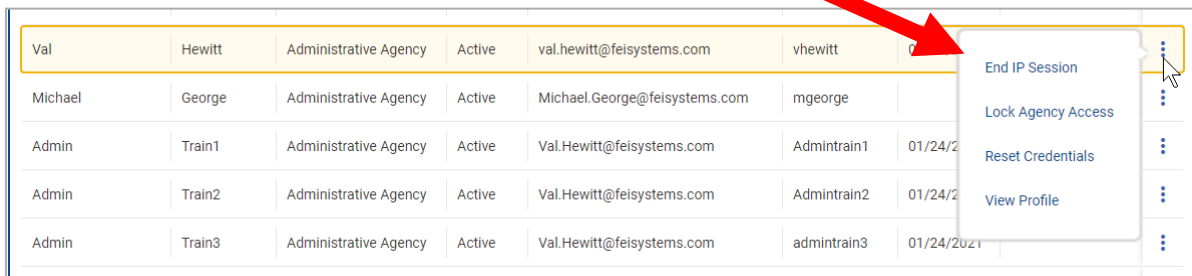
**Solution:** End IP System Session

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



#### 5.2.1.1 Option 1: Staff Members List

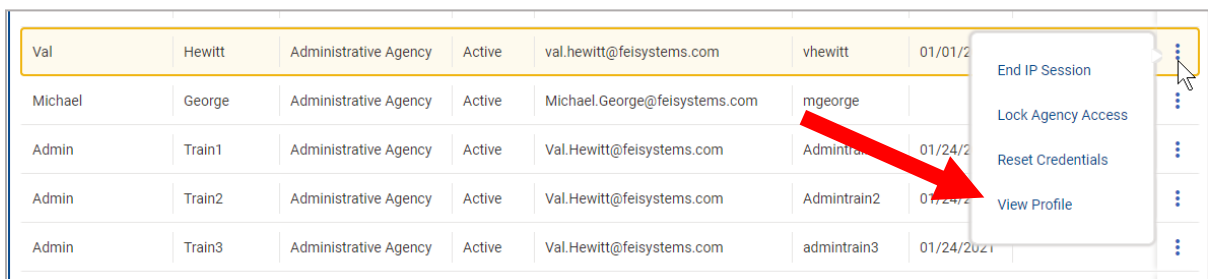
1. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **End IP Session**.



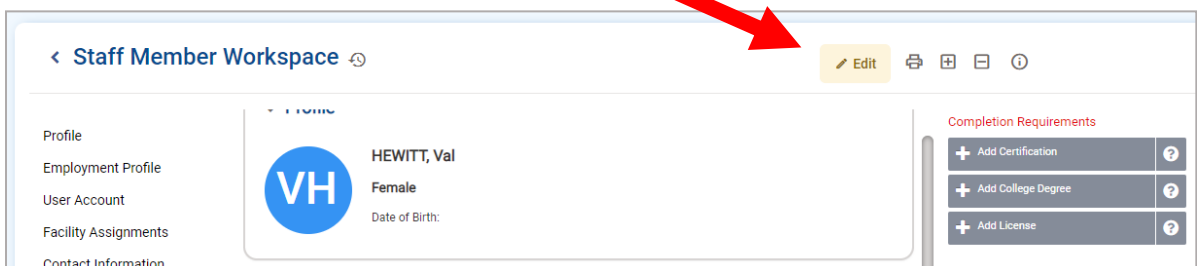
2. Ask the staff member to try logging in again.

#### 5.2.1.2 Option 2: Staff Member Profile

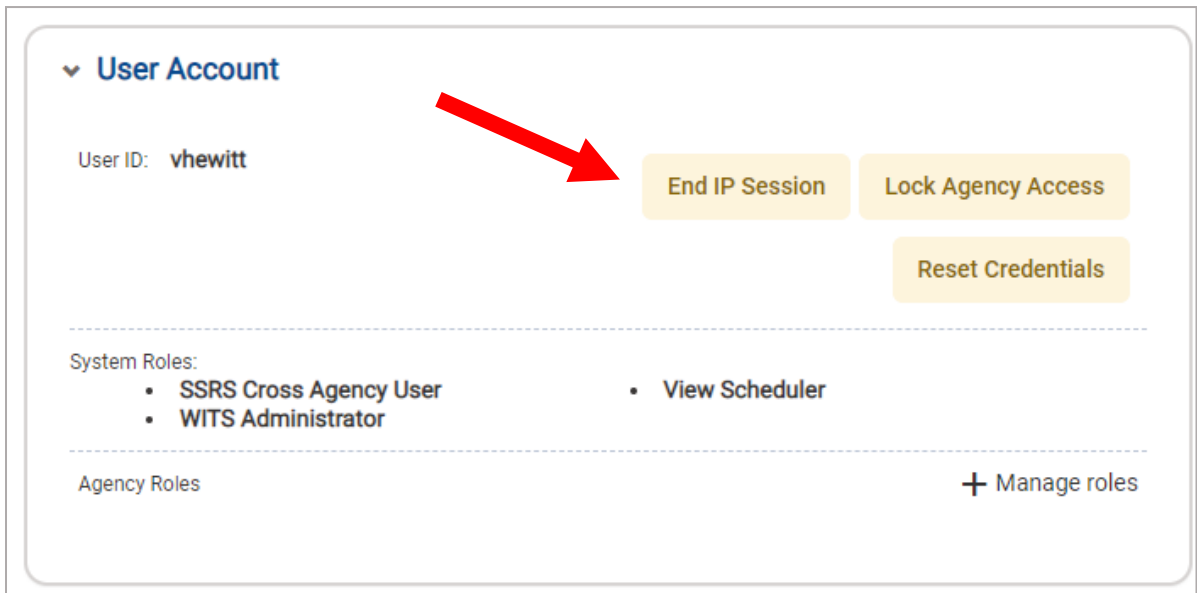
3. On the **Staff Members** list, locate the staff member, point to the pencil icon, and then click **View Profile**.



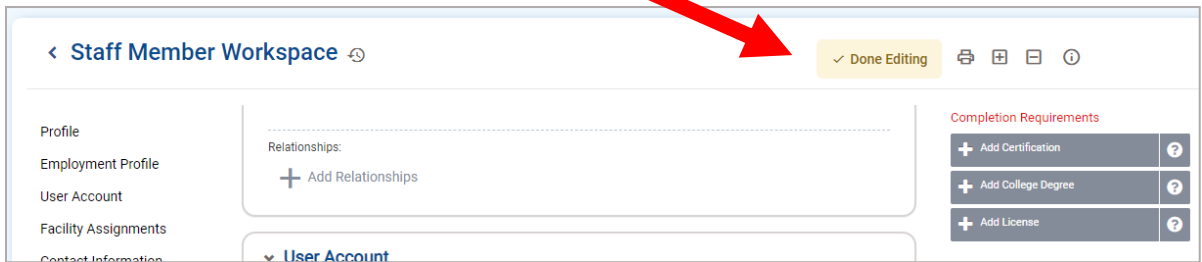
4. Click **Edit**.



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.



**i 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**.

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									

#### 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 an 'Edit' button with a pencil icon, which is highlighted by a red arrow. Below the header, there is a profile card for 'STAFFMEMBER, Joe' with a 'JS' avatar. To the right of the profile card is a list of 'Additional Items' including 'Define Employment Profile', 'Manage Accounts and Roles', 'Add Facility Assignment', 'Add Professional Qualification', 'Add Email', 'Add Phone Number', and 'Add Address'. On the left side, there is a sidebar menu with options like 'Profile', 'Employment Profile', 'User Account', 'Facility Assignments', 'Professional Qualifications', and 'Contact Information'.

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

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

12. Click **Done Editing**.

The screenshot shows the 'Staff Member Workspace' interface after editing. At the top right, the 'Edit' button has been replaced by a 'Done Editing' button with a checkmark icon, which is highlighted by a red arrow. The rest of the interface, including the profile card and sidebar menu, remains the same as in the previous screenshot.

### 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**.

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				

#### 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**.

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				

15. Click **Edit**.

**< Staff Member Workspace**

**Edit**
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Profile

Employment Profile

User Account

Facility Assignments

Professional Qualifications

Contact Information

**Profile**

**STAFFMEMBER, Joe**

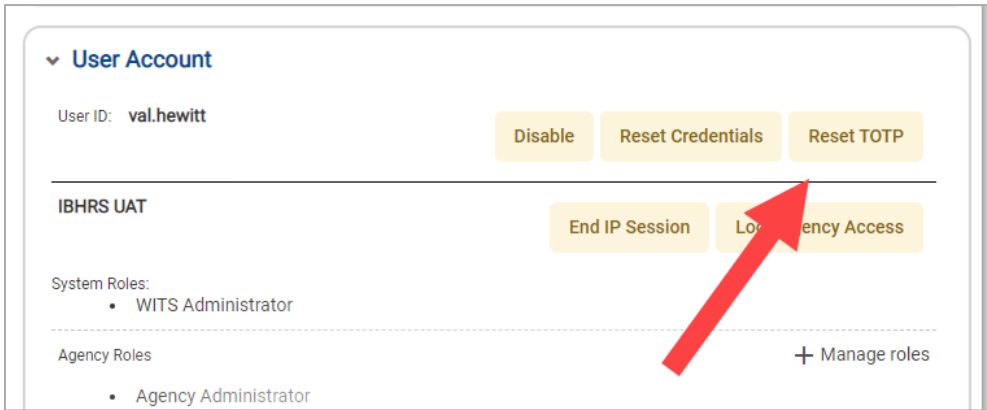
Male

Date of Birth:

**Additional Items**

- Define Employment Profile
- Manage Accounts and Roles
- Add Facility Assignment
- Add Professional Qualification
- Add Email
- Add Phone Number
- Add Address

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



17. Click **Done Editing**.

