



PPS Quick Reference Guide for Mental Health & AODA Users

Searching for Consumers

1. Click  from the Navigation Menu on the left to search for a single consumer throughout all of PPS*.
2. You must enter the consumer's first name, last name, and birth date.
3. Click **GO**.

*You can search for consumers using the Workload Management page, but only users with existing episodes (active or inactive) will appear.

Basic Registration

1. If the consumer was not found in PPS, click  from the Navigation Menu.
2. At minimum, complete the required (*) fields and click **Next**.
3. The system will perform duplicate checking. If a match is found you will be asked to select the match or create a new consumer record. Only create a new record if you are certain there is not a match.


Consumer Profile

1. For **new consumers**, you must **add an Episode** in order to complete the Consumer Profile. If the consumer already has an episode, you may select it and update it.
2. At minimum, **complete the required (*) fields**. Although not all fields are required, please capture as much detail as possible about the consumer. If you have questions about the fields, please refer to PPS Mental Health Deskcard or the PPS AODA Deskcard.
3. When finished, click **Save** or **Next** to continue.

If the consumer is **homeless**, please document the reporting county's address, city, state, zip and county.

Consumer Status Report (for Mental Health)

This should be collected and entered at enrollment, every 6 months while a consumer is receiving services, and at discharge. This section will not appear for consumers receiving short-term services.


1. After completing the Consumer Profile, click **Next**.
2. From the Service and Status Summary page, click  in the **Status Report** section.
3. Complete the required (*) fields and include other consumer details if provided.

Documenting SPCs


Adding SPCs

1. If there are no existing SPCs, click **Add** to create a new service.
2. Enter the service details by completing the required (*) fields.
3. Click **Return**.


Duplicating SPCs

1. After you've added a service or have an existing service, click .
2. Duplicating will create a new service and copy forward the details from the service you duplicated.
3. This is helpful if you want to **enter in units for multiple months** and the services do not already exist. All you need to **change** is the **Quantity of Units** and the **SPC Delivery Month**.


Editing SPCs


1. From the workload management page select the appropriate consumer (service details will be defaulted) or from the search page, select Service and Status Summary and click Go.
2. Click the  next to the appropriate SPC.
3. Make any edits that you need (update hours or end reason for example).
4. Click **Return** or **Next Service** to make changes to another service for that consumer. You can edit multiple services for the consumer this way, which includes updating **Quantity of Units** and the **SPC Delivery Month**.

Closing Open SPCs

1. From Workload Management, search for the consumer.
2. In the search results section click **Go** next to the appropriate consumer (Service Details defaults)
3. Click the  next to the appropriate SPC.
4. Enter the **SPC End Date** and **SPC End Reason**.
5. You can either click **Next Service** to close additional service or **Return** to return to the Service and Status Summary page.

Deleting SPCs*

1. Click the  next to the appropriate SPC.

2. Click .
 3. When asked if you want to delete the service, click **Yes**.
- * If all SPCs are deleted, the system will ask you if you also want to delete the episode.

Workload Management

Running Searches using Workload Management

Using Workload Management allows you to search for single or particular groups of individuals using various data elements to search by. The results from this search allow you quick access to make updates to consumer information. Please refer to the report matrix for suggested search criteria.

Example: SPC Review Date Tickler Report

Agency: Defaults based upon the logged in user

Module Type: AODA

Open Services Records Only: Check the box

SPC Review Month From: 05/2012

SPC Review Month To: 06/2012

Entering Units using Workload Management

Once you've submitted your search criteria, the system will return all available search results.

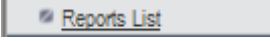
1. Identify the consumer you are interested in entering units for.
2. Click **Go**.
3. The system will display the first open SPC for the consumer.
4. If you need to update any of the existing services, you can do so by updating the fields and clicking **Next Service**.
 - a. For example, for the month of May you may need to update the quantity of units from 5 to a total of 10 for that delivery month.
5. If you need to **enter units for multiple months**, click **Duplicate** from the service you wish to enter additional monthly units. The data from the existing SPC will pull over to the new SPC.
6. Update the quantity of **Units** and the **SPC Delivery Month**.
7. Repeat steps 5-6 for each additional month you need to enter units for a service.
8. When finished, click **Return**.

Closing Episodes

1. From Workload Management, search for the consumer.
2. In the search results section, navigation defaults to Service Details, click **Go**.
3. Close any open SPCs for the consumer. You cannot close an Episode with open SPCs.
4. If you are closing a **Mental Health episode**, you will need to **record the final Consumer Status** data available at the time of discharge. Click **Add** to document a new Status Report.
5. When finished closing services, click **Return**. This will take you to the Consumer Profile.
6. Enter the **Episode End Date**.
7. For **AODA**, enter the **Substance Problem at End of Episode**.
8. For **Mental Health**, enter an **Episode End Reason**.
9. Click **Return** when finished.

Running Reports

The **Reports List** is similar to the online Mental Health or AODA reports you would run. It contains reports for Service Utilization and Treatment Outcomes. Reports are produced in Microsoft Excel. Please refer to the report matrix for suggested search criteria.

1. Click  from the Navigation menu on the left.
2. Click the **MH/AODA Report Criteria** Link.
3. You are required (*) to select the Report Type, Agency, Module Type, and Timeframe.
4. Select other criteria of interest.
5. Click **Submit**.