

Child & Adolescent Health Centers



Clinical Reporting Tool: SWP

A quick-start guide to using the CRT to enter, edit and view quarterly reports for School Wellness Program models

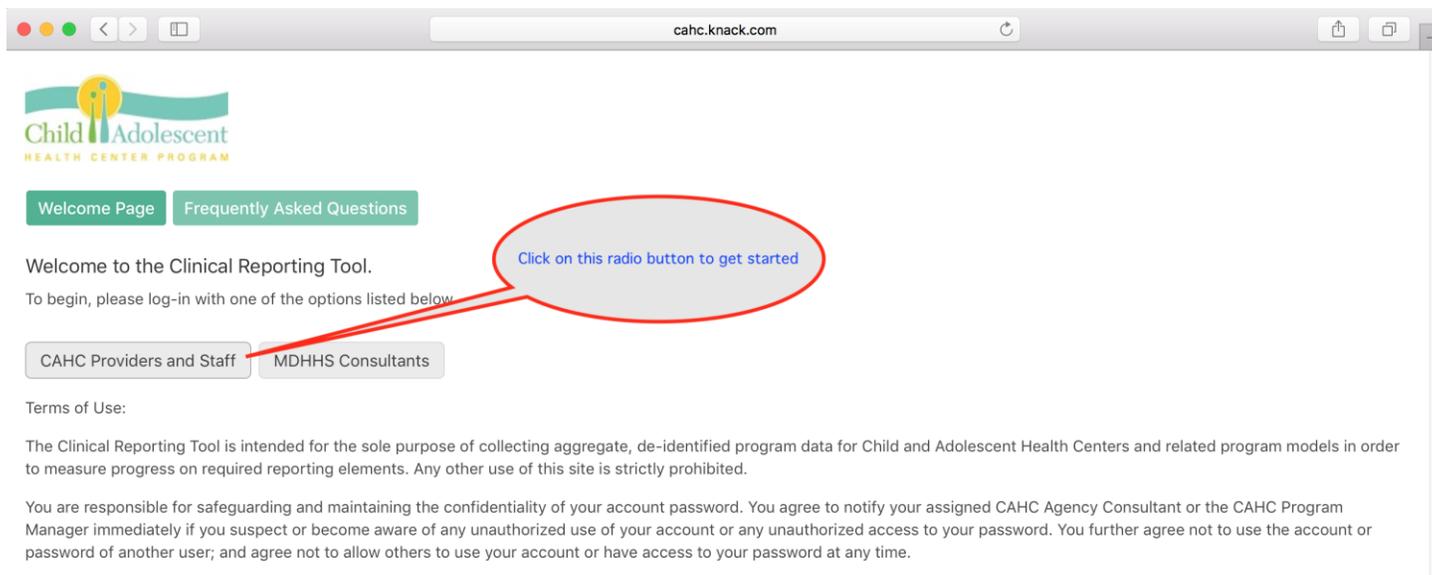
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Getting Started

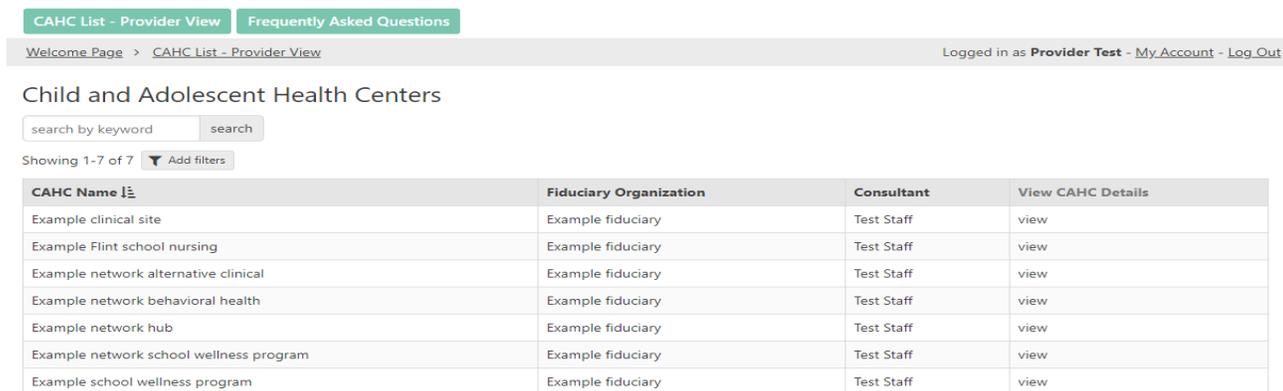


Welcome Page

To begin reporting data for your Child and Adolescent Health Center (CAHC) School Wellness Program model (SWP) and Flint School Nursing model (FSN), click on this link: [CAHC Clinical Reporting Tool](#). This link will take you to the Welcome Page for the Clinical Reporting Tool (CRT) as shown in the screenshot above. As a SWP provider or other staff member who uses the CRT to enter, edit or view data, select the radio button "CAHC Providers and Staff" to begin the log-in process. This will take you to the log-in page where you will enter your email address and password. The first time you log in, you will be prompted to change your password. Once your password is changed, you are ready to use the CRT. For more information on changing your password, see p. 30.

Access Page

After logging in, you will be directed to your access page. This page will show you a table listing all sites to which you have access; along with the assigned Agency Consultant. Select a SWP to begin working with by clicking on "view" in the far-right column (see screenshot below).



You will be directed to that site's main page. This page will list SWP details such as SWP name, model and linkage type, fiduciary organization (sponsoring agency), assigned Agency Consultant and location (either county or city of Detroit) (see screenshot below). If any of this information appears incorrect or should happen to change, contact your assigned Agency Consultant to request an update. As you scroll down the page, you will see two series of radio buttons: a series for viewing reports (View Reports) and a series for entering and/or editing report data (Enter or Edit Data). You will begin by entering data, as reports will not populate until data has been entered.



[CAHC List - Provider View](#)

[Frequently Asked Questions](#)

[Welcome Page](#) > [CAHC List - Provider View](#) > [View Clinic Details](#)

Logged in as **Provider Test** - [My Account](#) - [Log Out](#)

View CAHC Details

CAHC Name	Example school wellness program
Model	School wellness program
Linkage Type	School Based
Fiduciary Organization	Example fiduciary
Consultant	Test Staff
Location	Saginaw County

View Reports

[2018 Quarterly Report](#) [2018 Annual Billing Report](#) [2018 Financial Status Report](#)

Enter or Edit Data

[Unduplicated Users](#) [Users by Race](#) [Users by Ethnicity](#) [Visits](#) [Physical Exams and Immunizations](#) [Medical Tests](#) [RN Services](#)
[Medicaid Outreach](#) [Health Education](#) [Quality Measures](#) [Budget and Expenditures](#) [Billing](#) [Top Diagnoses](#) [Referrals](#)

[Back to CAHC List - Provider View](#)

Tips and Reminders

Navigating to your SWP Main Page or between Report Sections

If, at any time, you want to go to the SWP's main page or view a report (e.g., quarterly data), click on the View Clinic Details hyperlink located at the top of the page.

Navigating between SWPs

If you work with multiple sites and, at any time, you want to work with or view another site, select the "CAHC List – Provider View" radio button or hyperlink located at the top of the page.

Navigating between Fields

When entering or editing data, use the "Tab" key or mouse click to move between fields.

Required Data

You must enter a "0" (zero) when you have no data to report in any of the required data fields. You will receive an error message and will be prompted to make corrections if any required fields are left blank. Due to the nature of how the CRT is programmed, there are some areas where SWPs will enter zeroes in data fields, as these elements only apply to the CAHC program.

Data Validation

Data validation has been built into the system for certain data fields. You will receive an error message and will be prompted to make corrections if any fields contain errors that violate the data validation rules.

Fiscal Years

Fiscal years begin on October 1 and end on September 30 (e.g., Fiscal Year 2019: October 1, 2018 – September 30, 2019).

Quarters and Quarterly Report Due Dates

<i>Quarter</i>	<i>Reports Due by</i>	<i>CRT Locks for Quarter on</i>
Quarter 1: October 1 – December 31	January 30	March 1
Quarter 2: January 1 – March 31	April 30	June 1
Quarter 3: April 1 – June 30	July 30	September 1
Quarter 4: July 1 – September 30 <i>(includes annual/year-end only reports)</i>	October 30	December 1

Reporting FAQ

If you have a question on a reporting element, note there is a link to a reporting FAQ, that may have the answer you're looking for, at the top of each page. You can also visit the SWP website at www.michigan.gov/swp for the most up-to-date Report Definitions.

Entering or Editing Data

Process for Entering and Editing Data

The process for entering and editing data is the same across multiple subsections of the reports (e.g., unduplicated users, including users by race and by ethnicity), visits, medical tests (pregnancy, chlamydia, gonorrhea and HIV testing), Medicaid outreach, health education and quality measures. Therefore, the process for entering and editing data will be described once, using data entry for unduplicated users as an example. Separate instructions are highlighted where there are variations to the process or where specific instructions pertain to a single report.

Data Entry Process Example: Unduplicated Users

Select the "Unduplicated Users" radio button from the "Enter and Edit Data" section on your site's main page (see screenshot below).

The screenshot displays the 'Child Adolescent Health Center Program' interface. At the top, there are navigation tabs for 'CAHC List - Provider View' and 'Frequently Asked Questions'. Below this is a breadcrumb trail: 'Welcome Page > CAHC List - Provider View > View Clinic Details' and a user status indicator: 'Logged in as Provider Test - My Account - Log Out'.

The main content area is titled 'View CAHC Details' and contains a table with the following information:

CAHC Name	Example school wellness program
Model	School wellness program
Linkage Type	School Based
Fiduciary Organization	Example fiduciary
Consultant	Test Staff
Location	Saginaw County

Below the table is a 'View Reports' section with three buttons: '2018 Quarterly Report', '2018 Annual Billing Report', and '2018 Financial Status Report'.

The 'Enter or Edit Data' section features a grid of buttons. A red arrow points to the 'Unduplicated Users' button. The other buttons in the grid are: 'Users by Race', 'Users by Ethnicity', 'Visits', 'Physical Exams and Immunizations', 'Medical Tests', 'RN Services', 'Medicaid Outreach', 'Health Education', 'Quality Measures', 'Budget and Expenditures', 'Billing', 'Top Diagnoses', and 'Referrals'.

At the bottom left, there is a link: 'Back to CAHC List - Provider View'.

You will now see an option to enter new data by selecting the “Add Unduplicated Users” radio button, as well as a table that displays any data that has previously been entered (see screenshot below).

The screenshot shows the top navigation bar with the logo for Child & Adolescent Health Center Program. Below the navigation bar, there are tabs for 'CAHC List - Provider View' and 'Frequently Asked Questions'. The breadcrumb trail reads: 'Welcome Page > CAHC List - Provider View > View Clinic Details > Unduplicated Users'. The user is logged in as 'Provider Test' with links for 'My Account' and 'Log Out'. The main heading is 'Example school wellness program'. Below this is the text 'Example fiduciary' and 'Enter Data'. A red arrow points to a button labeled 'Add Unduplicated Users'. Below the button is the heading 'View Unduplicated Users' and a table with the following structure:

Fiscal Year	Quarter	Gender	0 through 4	5 through 9	10 through 17	18 through 21	Edit Data
No Data							

A data entry form will display. Select the current fiscal year. Select the current quarter. Select the gender for which you will be entering data first (male or female). Enter the number of users for the selected gender by the appointed age ranges. When all data is entered, click the “Submit” radio button at the bottom of the form (see screenshot below).

The screenshot shows the 'Add Unduplicated Users' form. The breadcrumb trail is: 'Welcome Page > CAHC List - Provider View > View Clinic Details > Unduplicated Users > Add unduplicated users'. The user is logged in as 'Provider Test' with links for 'My Account' and 'Log Out'. The form title is 'Add Unduplicated Users' with a sub-instruction: 'Enter the unduplicated user count for the quarter. You must enter male and female unduplicated users separately.' The form contains the following fields:

- Fiscal Year: 2018
- Quarter: 1
- Gender: Male
- 0 through 4: 2
- 5 through 9: 0
- 10 through 17: 100
- 18 through 21: 210

A red arrow points to the 'Submit' button at the bottom of the form.

You will receive a message indicating your form has been successfully submitted. You will see a hyperlink near the bottom of the page that will allow you to “Reload the Form” and enter data for the other gender. You can also select the “Add Unduplicated Users” hyperlink at the top of the page to reload the form and enter data for the other gender (see screenshot on the next page).

Add Unduplicated Users

Enter the unduplicated user count for the quarter. You must enter male and female unduplicated users separately.

Form successfully submitted.

[↻ Reload form](#)

Select either hyperlink to reload the form and complete data for the other gender

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[Back to Unduplicated Users](#)

After data is entered and submitted, you can click on one of the “Unduplicated Users” hyperlinks (there is one located at both the top and bottom of the page). This action will take you back to the “Unduplicated Users” main page where you can view a table with unduplicated user data. If you see an error as you double-check your data entry, simply select the “edit” hyperlink in the far right column of the data for the row (quarter/gender) that you wish to correct. The form will display and you can make necessary edits in this form. You can also opt to go back to viewing clinic details if you don’t wish to review your data at this time; and/or to move to the next section of the report. You can also select the “CAHC List – Provider View” radio button or hyperlink at the top of the page to move to another site (see screenshot below).

Example school wellness program

Example fiduciary

Enter Data

[Add Unduplicated Users](#)

View Unduplicated Users

Select to move to another SWP

Select either hyperlink to move to another section of the report

Select to edit data

Fiscal Year	Quarter	Gender	0 through 4	5 through 9	10 through 17	18 through 21	Edit Data
2018	3	Male	2	0	100	0	edit

[Back to View Clinic Details](#)

Data Entry Process Example: RN Services

Select the "RN Services" radio button from the "Enter and Edit Data" section on your site's main page (see screenshot below).

The screenshot shows the 'View CAHC Details' section for an 'Example school wellness program'. Below this is the 'View Reports' section with buttons for '2018 Quarterly Report', '2018 Annual Billing Report', and '2018 Financial Status Report'. The 'Enter or Edit Data' section contains a row of buttons: 'Unduplicated Users', 'Users by Race', 'Users by Ethnicity', 'Visits', 'Physical Exams and Immunizations', 'Medical Tests', and 'RN Services'. A red arrow points to the 'RN Services' button. Below the buttons is a 'Back to CAHC List - Provider View' link.

You will now see an option to enter new data by selecting the "Add RN Services" radio button, as well as a table that displays any data that has previously been entered (see screenshot below).

The screenshot shows the 'RN Services' page for the 'Example school wellness program'. Under the 'Example fiduciary' section, the 'Add RN Services' button is highlighted with a red arrow. Below this is the 'View RN Services' section, which features a table with columns: 'Fiscal Year', 'Quarter', 'Care Coordination', 'Client Education', 'Communicable Disease', 'Crisis Intervention', 'Immunization Promotion', 'Medication Administration', and 'Screening'. The table currently displays 'No Data'. A 'Back to View Clinic Details' link is located below the table. At the bottom of the page, it says 'Powered by Knack'.

A data entry form will display. Select the current fiscal year. Select the current quarter. Enter nursing contact data for each of the types of nursing services listed (see screenshot below). These measures are new for FY19. Basic definitions are included in the CRT, but for more detailed definitions, refer to the "SWP Quarterly Reporting Definitions" document which is posted at www.michigan.gov/swp.

Add RN Services

Fiscal Year *

Quarter *

Nursing Contacts

Nursing Contacts include services that occur within a visit, or follow-up care that is documented in the client's record.

Care Coordination *

Report contacts (parent/guardian, primary care provider, agency, school staff) for care coordination and chronic disease management (asthma, allergies, etc).

Client Education *

Report contacts where one-on-one education was provided to a client related to a specific disease process, medications, prevention, or health promotion.

Communicable Disease *

Report contacts (community, local health department, parent/guardian, primary care provider, school staff) to decrease and manage the incidence and prevalence of contagious disease.

Crisis Intervention *

Report contacts with clients where short-term counseling was provided to help the client cope with a crisis.

Immunization Promotion *

For chronic condition management data, detailed definitions can be found at www.michigan.gov/swp. A clarification e-mail was distributed to SWPs on December 21, 2018 regarding how to track obesity as a chronic condition. Remember, if the % of clients with chronic conditions with case management plans in place is greater than 100%, an error message will pop up and you will not be able to submit this data.

When all data is entered, click the "Submit" radio button at the bottom of the form (see screenshot below).

Chronic Condition Management

For this measure, report the YTD number each quarter. Note that this is different than other quarterly reporting elements, where data is reported by quarter for that specific quarter only. Also, remember when reporting the following two Chronic Condition measures, report the unduplicated number of CLIENTS, not the number of services or contacts.

Clients with Chronic Conditions *

Report the unduplicated number of clients seen with a diagnosis of a chronic disease, including allergies, asthma, diabetes, epilepsy and/or obesity.

Chronic Conditions with Case Management *

Report the unduplicated number of clients seen with a diagnosis of a chronic disease who have an individualized care plan and/or action plan, which may include annual medication monitoring.

Percent of Clients with Chronic Conditions with Case Management

0.0%

If this percentage is greater than 100%, there is an error in your data. Please check your Chronic Conditions Management data entries.

Data Entry Process Example: Medicaid Outreach

Select the "Medicaid Outreach" radio button from the "Enter and Edit Data" section on your site's main page (see screenshot below).



CAHC List - Provider View Frequently Asked Questions

Welcome Page > CAHC List - Provider View > View Clinic Details

Logged in as **Provider Test** - My Account - Log Out

View CAHC Details

CAHC Name	Example school wellness program
Model	School wellness program
Linkage Type	School Based
Fiduciary Organization	Example fiduciary
Consultant	Test Staff
Location	Saginaw County

View Reports

2018 Quarterly Report 2018 Annual Billing Report 2018 Financial Status Report

Enter or Edit Data

Unduplicated Users **Users by Race** Users by Ethnicity Visits Physical Exams and Immunizations Medical Tests RN Services
Medicaid Outreach Health Education Quality Measures Budget and Expenditures Billing Top Diagnoses Referrals

[Back to CAHC List - Provider View](#)

You will now see an option to enter new data by selecting the “Add Medicaid Outreach” radio button, as well as a table that displays any data that has previously been entered.

A data entry form will display (see screenshot below). Select the current fiscal year. Select the current quarter. Enter Medicaid Outreach data for Outreach Areas 1 and 2. SWPs are not required to report on Outreach Area 5 so please place zeroes in this section. For a reminder of what activities are eligible under each Medicaid Outreach Area, visit the [FAQ tab](#) at the top of the page. Detailed quarterly reporting definitions can be found at www.michigan.gov/swp.

When all data is entered, click the “Submit” radio button at the bottom of the form.

Add Medicaid Outreach

Fiscal Year *

Quarter *

Outreach Area 1

Medicaid Outreach / Public Awareness

Number contacted *

Outreach Area 2

Facilitating Medicaid Eligibility Determination

Uninsured clients *

Assisted with enrollment *

Enrolled in Medicaid *

Outreach Area 5

Medicaid-Specific Trainings

Medicaid-specific trainings *

Medicaid training participants *

Data Entry Process Example: Quality Measures

Select the "Quality Measures" radio button from the "Enter and Edit Data" section on your site's main page (see screenshot below).



CAHC List - Provider View Frequently Asked Questions

Welcome Page > CAHC List - Provider View > View Clinic Details Logged in as **Provider Test** - My Account - Log Out

View CAHC Details

CAHC Name	Example school wellness program
Model	School wellness program
Linkage Type	School Based
Fiduciary Organization	Example fiduciary
Consultant	Test Staff
Location	Saginaw County

View Reports

2018 Quarterly Report 2018 Annual Billing Report 2018 Financial Status Report

Enter or Edit Data

Unduplicated Users Users by Race Users by Ethnicity **Visits** Physical Exams and Immunizations Medical Tests RN Services

Medicaid Outreach Health Education **Quality Measures** Budget and Expenditures Billing Top Diagnoses Referrals

[Back to CAHC List - Provider View](#)

You will now see an option to enter new data by selecting the "Add Quality Measures" radio button, as well as a table that displays any data that has previously been entered. A data entry form will display. Select the current fiscal year. Select the current quarter. Enter data for up-to-date risk assessment and mental health quality measures. The following measures do not apply to the SWP program: up-to-date physical exams, clients with complete immunizations for age, asthma quality measures, BMI quality measures, and tobacco quality measures. Please place zeroes in these sections (see example screenshot below). When all data is entered, click the "Submit" radio button at the bottom of the form.

[View the current ACIP recommended vaccine schedule](#)

Add Quality Measures

For each of the following Quality Measures, report the YTD NUMBER each quarter. Each quarter, your data should be at least equal to, but likely greater than, the previous quarter (with the exception of immunizations, which may fluctuate depending on client age and where clients are in a series). Note that this is different than the quarterly reporting elements, where data is reported by quarter for that specific quarter only. Refer to the Frequently Asked Questions or your model's Report Definitions for more information on each quality measure.

Fiscal Year *

Quarter *

Clients with an up-to-date physical exam *

Report the unduplicated number of clients that have an up-to-date, documented, comprehensive physical exam (well-child, EPSDT) regardless of where exam provided.

Clients with an up-to-date risk assessment *

Report the unduplicated number of clients with an up-to-date risk assessment / anticipatory guidance.

Clients with complete immunizations for age *

Report the unduplicated number of clients complete with current, ACIP-recommended immunizations for age on the date of service.

Asthma Quality Measures

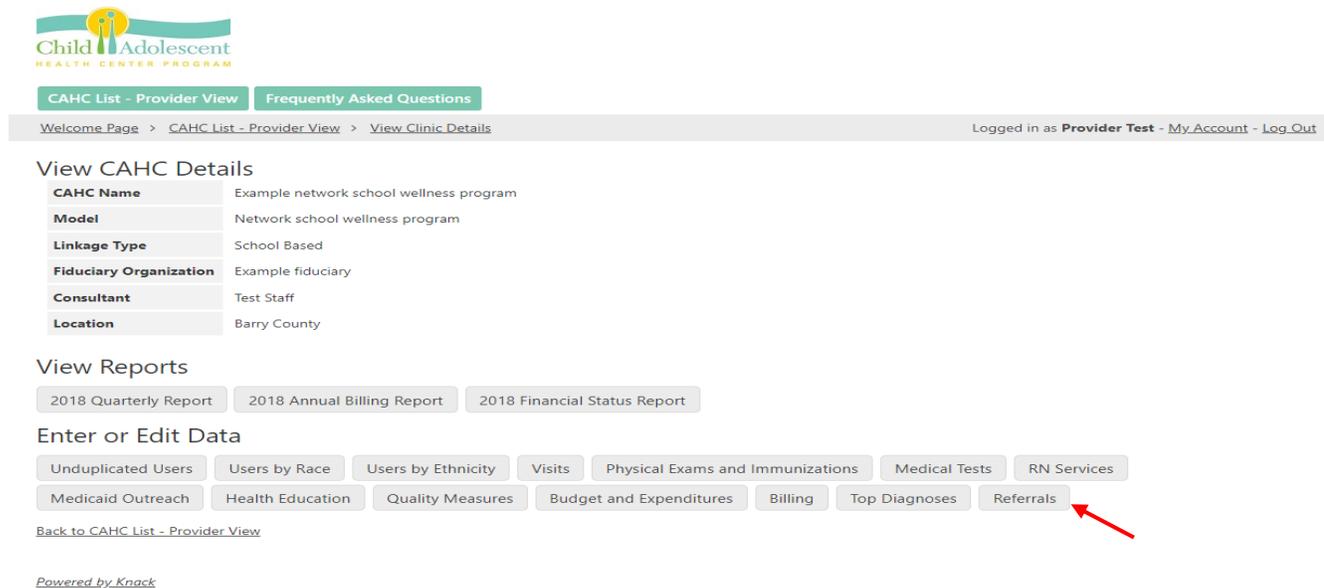
Clients with asthma diagnosis *

Report the unduplicated number of clients with a diagnosis of asthma.

Clients with asthma care plan *

Network SWPs: Reporting Referrals

For Network SWPs only, you will report both "Referrals Received" and "Referrals Provided." To do so, click on the "Referrals" tab under "Clinic Details."



The screenshot shows the "View CAHC Details" page for an "Example network school wellness program". The "Referrals" tab is highlighted with a red arrow. The interface includes a navigation menu, a breadcrumb trail, and a list of data entry options.

View CAHC Details

CAHC Name	Example network school wellness program
Model	Network school wellness program
Linkage Type	School Based
Fiduciary Organization	Example fiduciary
Consultant	Test Staff
Location	Barry County

View Reports

2018 Quarterly Report | 2018 Annual Billing Report | 2018 Financial Status Report

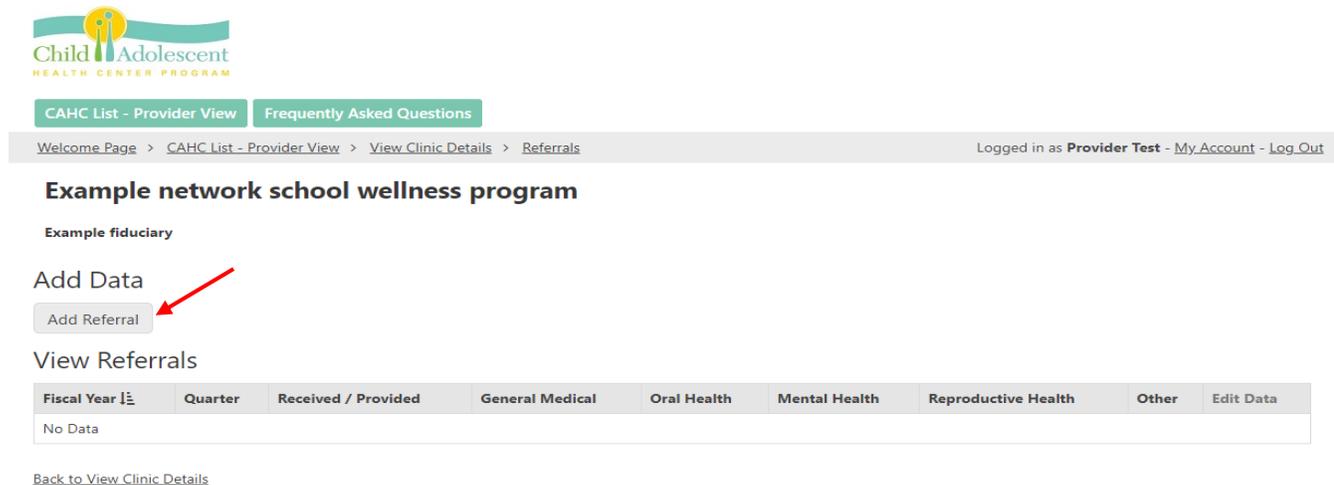
Enter or Edit Data

Unduplicated Users | Users by Race | Users by Ethnicity | Visits | Physical Exams and Immunizations | Medical Tests | RN Services | Medicaid Outreach | Health Education | Quality Measures | Budget and Expenditures | Billing | Top Diagnoses | **Referrals**

[Back to CAHC List - Provider View](#)

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Click on "Add Referral" on the next screen.



The screenshot shows the "Add Data" screen for the "Example network school wellness program". The "Add Referral" button is highlighted with a red arrow. The interface includes a navigation menu, a breadcrumb trail, and a table for viewing referrals.

Example network school wellness program

Example fiduciary

Add Data

Add Referral

View Referrals

Fiscal Year 	Quarter	Received / Provided	General Medical	Oral Health	Mental Health	Reproductive Health	Other	Edit Data
No Data								

[Back to View Clinic Details](#)

Network Referrals Continued

A data entry form will display. Select the current fiscal year. Select the current quarter. Select the type of referral for which you will be entering data first (received or provided). Enter the number of referrals for the selected referral type by the appointed categories (general medical, oral health, mental health, reproductive health, and other). When all data is entered, click the "Submit" radio button at the bottom of the form (see screenshot below).

The screenshot shows the 'Add Referrals' form with the following fields and values:

- Fiscal Year ***: 2018
- Quarter ***: 3
- Received / Provided ***: Received
- General Medical ***: 20
- Oral Health ***: 10
- Mental Health (Psychiatric/Intensive Mental Health) ***: 15
- Reproductive Health ***: 10
- Other ***: 5

A red arrow points to the **Submit** button at the bottom of the form.

You will receive a message indicating your form has been successfully submitted. You will see a hyperlink near the bottom of the page that will allow you to "Reload the Form" and enter data for the other referral type. You can also select the "Add Referrals" hyperlink at the top of the page to reload the form and enter data for the other referral types.

Reports and Reporting Elements that Do Not Pertain to SWP Models

There are some reports, and some reporting elements within reports, that SWP sites are not required to complete. The following list should help you navigate the various reports.

As a reminder, the [FAQ tab](#) at the top of the page will provide basic clarifications on reporting measures by model types, however, for a complete list of detailed definitions refer to “SWP Quarterly Reporting Definitions” document which is posted at www.michigan.gov/swp.

Visits: You can ignore the “Add Visits” and “Add Mental Health Visits” radio buttons. SWPs have a unique radio button titled, “Add SWP and FSN Visits.”

Physical Exams: Under the “Add Physical Exams and Immunizations” tab, please place zeroes under “total physical exams” and “physical exams billed to Medicaid” as SWP sites do not report on these elements. However, you still need to report on “immunizations” under this same tab. Please add data for “total immunizations” and “immunizations billed to Medicaid” by quarter. If your SWP does not provide immunizations, please place zeroes under immunizations so that program staff know immunizations were not provided.

Medicaid Outreach Report: SWP sites are not required to report on Medicaid Outreach Area 5 (Medicaid-specific training). While you do not have to report data for this outreach area, this is a required field for other CAHC models; therefore, you will need to enter zeroes in the corresponding fields in order to submit the form (report).

Quality Measures Report: SWP sites are not required to report all Quality Measures. SWPs are required to report: clients with an up-to-date (UTD) risk assessment/anticipatory guidance, clients age 10-21 years who are UTD with a depression screen (flag), clients age 12 and up with a positive depression screen (assessment), and clients age 12 and up with a positive depression screen (assessment) who have documented, appropriate follow-up. Because all fields (all quality measures) are required for other CAHC models, you will need to enter zeroes in the fields that do not pertain to the SWP model in order to submit the form (report). For questions related to the depression screening, please see the [Mental Health Quality Measure Tip Sheet](#).

Budgets and Expenditures (Financial Status Report/FSR)

Data Entry Process for the Budget

From your SWP's main page, select the "Budget and Expenditures" radio button under the "Enter and Edit Data" section. The top half of the "Budget and Expenditures" main page displays budget information. The bottom half of the page displays "Expenditures" information. You will see tables that display any data that has previously been entered according to budget categories (View Categorical Budgets) and funding source (View Fund Source Budgets), as well as a table with links to view and edit Quarterly Expenditures. Under the section marked "Enter Budget Data," select the "Add Budget" radio button. (see screenshot below).

The screenshot shows a web browser window with the URL cahc.knack.com. The page header includes the logo for "Child Adolescent HEALTH CENTER PROGRAM" and navigation links: "Welcome Page", "CAHC List - Provider View", and "Frequently Asked Questions". The breadcrumb trail is: "Welcome Page > CAHC List - Provider View > View Clinic Details > Budget". The user is logged in as "Provider Test" with links for "My Account" and "Log Out".

ACCESS Child and Adolescent Health Center

ACCESS

Enter Budget Data

Add Budget

Budgets

View Categorical Budgets

Fiscal Year	Salary and Wage	Fringe Benefits	Travel	Supplies and Materials	Contractual	Equipment	Other	Indirect	Total Budget
No Data									

View Fund Source Budgets

Fiscal Year	State Agreement	Local	Federal	Other Source	Fees and Collections	Total Budget
No Data						

Expenditures

Select a fiscal year budget to add quarterly expenditures.

A data entry form will display. Each year in quarter 1, you will select the current fiscal year from the drop down menu and enter the budgeted dollar amounts both by category and by funding source; per the approved budget agreement that was submitted and approved as part of the NCAP (non-competitive application) process, and was subsequently included in the CAHC grant contract.

Double-check your budget data prior to submitting the form. When all budget data is entered and verified for accuracy, click the “Submit” radio button at the bottom of the form (see screenshot below).

The screenshot shows a web browser window with the URL cahc.knack.com. The page is titled "Enter Budget by Category" and contains several sections for budget entry. Each section has a label followed by a red asterisk and an input field with a value. The categories and values are: Salary and wage budget (200,000), Fringe benefits budget (100,000), Travel budget (3,000), Supplies and materials budget (6,500), Contractual budget (0), Equipment budget (0), Other budget (10,000), and Indirect budget (0). Below this is the "Enter Budget by Fund Source" section with: State agreement budget (250,000), Local budget (75,000), Federal budget (0), Other source budget (25,000), and Fees and collections budget (75,000). A red arrow points to the "Fees and collections budget" input field. At the bottom, there is a "Submit" button and a disclaimer: "Please verify that your budget is accurate before submission. You will not be able to edit your budget once submitted. If you do need to make corrections to a submitted budget, please contact your consultant."

You will receive a message indicating your form has been successfully submitted. You will see a hyperlink at the bottom of the page that will allow you to go “Back to Budget;” or you can select the “Budget” hyperlink at the top of the page. Either action will take you back to the “Budget and Expenditures” main page where you can now view your budget and enter first quarter expenditures.

Note there is no “edit” hyperlink for the budget in this table as there is for other report data. This feature prevents budgets from being amended without prior approval. If you made a data entry error, contact your assigned Agency Consultant.

You can also opt to go back to viewing clinic details if you want to move to the next section of the report portal; or select the “CAHC List – Provider View” radio button or hyperlink to move to another health center (see screenshot on following page).

Data Entry Process for Expenditures (Financial Status Report/FSR)

On the bottom half of the “Budget and Expenditures” main page, you will see a section marked “Expenditures” with a table titled “Add Quarterly Expenditures.” In this table, select the “view and edit” hyperlink for the current fiscal year for which you are reporting (see screenshot on following page). (Note that this is the same page and process you will use to enter subsequent quarterly expenditures to the FSR.)

Child & Adolescent Health Center Program

Welcome Page | CAHC List - Provider View | Frequently Asked Questions

Welcome Page > CAHC List - Provider View > View Clinic Details > Budget

ACCESS Child and Adolescent Health Center

ACCESS

Enter Budget Data

Add Budget

Budgets

View Categorical Budgets

Fiscal Year	Salary and Wage	Fringe Benefits	Travel	Supplies and Materials	Contractual	Equipment	Other	Indirect	Total Budget
2018	\$200,000.00	\$0,000,000.00	\$3,000.00	\$6,500.00	\$0.00	\$0.00	\$10,000.00	\$0.00	\$319,500.00

View Fund Source Budgets

Fiscal Year	State Agreement	Local	Federal	Other Source	Fees and Collections	Total Budget
2018	\$250,000.00	\$75,000.00	\$0.00	\$25,000.00	\$75,000.00	\$425,000.00

Expenditures

Select a fiscal year budget to add quarterly expenditures.

Add Quarterly Expenditures

Fiscal Year	Quarterly Expenditures
2018	view and edit

[Back to View Clinic Details](#)

At the top of the "Expenditures" page, you will see a section marked "Add Quarterly Expenditures" as well as tables that display expenditures according to category (Quarterly Expenditures by Category) and funding source (Quarterly Expenditures by Fund Source). This page also includes a "Certification" section which displays at the bottom of the page. At the top of the page, under the section marked "Add Quarterly Expenditures," select the "Add Expenditures" radio button (see screenshot below).

Child & Adolescent Health Center Program

Welcome Page | CAHC List - Provider View | Frequently Asked Questions

Welcome Page > CAHC List - Provider View > View Clinic Details > Budget > Quarterly expenditures

ACCESS Child and Adolescent Health Center

Add Quarterly Expenditures

Add Expenditures

Quarterly Expenditures by Category

Quarter	Salaries and Wages	Fringe Benefits	Travel	Supplies and Materials	Contractual	Equipment	Other	Indirect Costs	Total Expenditures	Edit Expenditures
No Data										

Quarterly Expenditures by Fund Source

Quarter	State Agreement	Local	Federal	Other Source	Fees and Collections	Total Expenditures (Source)	Edit Expenditure
No Data							

Certifications

Quarter	Certification Signature	Certification Date	Add Certification
No Data			

[Back to Budget](#)

A data entry form will display. Select the current quarter for which you are reporting from the drop down menu, and enter the dollar amounts for expenditures by category (e.g., salaries and wages, fringe benefits, etc.) and by funding source (e.g., state agreement, local funds, etc.) for the quarter. At the bottom of the form, you will see the "Add Certification" section. Select the current date (which should be the default date) from the calendar in the "Certification Date" field. Using your mouse, sign the "Certification Signature" box and click on the "Submit" radio button. (Note you have options to undo key strokes or reset the signature if your signature is not legible.) See screenshot on next page.

Other *

1000

Indirect costs *

0

Enter Expenditures by Fund Source

State agreement *

75,789

Local *

10,000

Federal *

0

Other source *

2,000

Fees and collections *

34,000

Add Certification

Add a signature to certify that your data is finalized for the quarter. You may leave this field blank if your data is not finalized at this time. To add a certification to previously entered data, click the 'certify' link in the Certifications table above.

Certification Date

01/03/2018

Certification Signature

reset

I certify that I am authorized to sign on behalf of the local agency and that this is an accurate statement of expenditures and collections for the report period. Appropriate documentation is available and will be maintained for the required period to support costs and receipts reported.

Submit

You will receive a message that the form has been successfully submitted. You will see a hyperlink at the bottom of the page that will allow you to go back to the “Quarterly Expenditures” page. You can also select the “Budget” hyperlink at the top of the page to go back to the “Budget and Expenditures” main page (see screenshot below).

Child Adolescent HEALTH CARE PROGRAM

Welcome Page CAHC List - Provider View Frequently Asked Questions

Welcome Page > CAHC List - Provider View > View Clinic Details > Budget > Quarterly expenditures > Add expenditures

Logged in as Provider Test - My Account - Log Out

Add Expenditures

Form successfully submitted.

Reload form

Powered by Knack

Back to Quarterly expenditures

Select to move back to the Budget and Expenditures main page

Select either hyperlink to move back to the Quarterly Expenditures main page

Navigating to “Quarterly Expenditures” will take you back to the “Expenditures” page where you can now view your quarterly expenditures.

If you see an error and need to edit expenditures, click on the “edit” hyperlink in the far right column of the table titled “Add Quarterly Expenditures” (see screenshot on following page). Two tables will display; one showing “Quarterly Expenditures by Category” and one showing “Quarterly Expenditures by Fund Source.” In the far right column of the table that corresponds to the edit you wish to make (category or fund source and quarter), select the “edit” hyperlink (see screenshot on following page). The form will reload and you will then be able to edit data.

cahc.knack.com

Child Adolescent Health Center Program

Welcome Page | CAHC List - Provider View | Frequently Asked Questions

Welcome Page > CAHC List - Provider View > View Clinic Details > Budget > Quarterly expenditures

Logged in as Provider Test - My Account - Log Out

ACCESS Child and Adolescent Health Center

Add Quarterly Expenditures

Add Expenditures

Quarterly Expenditures by Category

Quarter	Salaries and Wages	Fringe Benefits	Travel	Supplies and Materials	Contractual	Equipment	Other	Indirect Costs	Total Expenditures	Edit Expenditures
1	\$52,168.00	\$24,223.00	\$150.00	\$300.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$77,841.00	edit
YTD expenditures	\$52,168.00	\$24,223.00	\$150.00	\$300.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$77,841.00	

Quarterly Expenditures by Fund Source

Quarter	State Agreement	Local	Federal	Other Source	Fees and Collections	Total Expenditures (Source)	Edit Expenditure
1	\$75,789.00	\$10,000.00	\$0.00	\$2,000.00	\$34,000.00	\$121,789.00	edit
YTD expenditures	\$75,789.00	\$10,000.00	\$0.00	\$2,000.00	\$34,000.00	\$121,789.00	

Certifications

Quarter	Certification Signature	Certification Date	Add Certification
1		01/03/2018	certify

[Back to Budget](#)

To view the complete FSR, navigate back to the health center's main page by selecting the "View Clinic Details" hyperlink at the top of the page and click the "Financial Status Report" radio button under the "View Reports" section.

Budget and FSR Reminders

New budget line items cannot be added during the fiscal year without first having an approved budget amendment on record. As a result, you will not be able to enter expenditures for any line items that are not included on the original approved budget, regardless of the source of funds.

A cost deviation allowance of 15% or \$10,000 per line item (whichever is greater) is permitted. Any deviations over this amount will be flagged on the Financial Status Report in bold red font. **If you anticipate exceeding the cost deviation allowance on any line item, a budget amendment must be requested and approved in advance.**

Any and all budget amendments must be requested and approved by July 1. **No exceptions can be made to that deadline.**

Budgets will be unlocked for editing (and/or only until July 15) so that any approved changes can be made to the budget by your assigned Agency Consultant.

Annual (Year-End) Only Reports

Annual Billing Report (for SWPs currently billing)

This section only pertains to SWP sites that are currently billing for mental health and/or RN services. If your site is not currently billing, please skip this section of the report. Do not enter zeroes or complete any of the fields.

From your site's main page, select the "Billing Report" radio button under the "Enter or Edit Data" section. You will now see an "Enter Data" section with radio buttons providing options to "Add Billing Data" and "Add Claims Denial Information." You will also see tables that display any previously-entered billing data and claims denial information. To begin, select the "Add Billing Data" radio button (see screenshot below).

The screenshot shows the CAHC List - Provider View interface. At the top left is the logo for the Child Adolescent Health Center Program. Below the logo are two buttons: "CAHC List - Provider View" and "Frequently Asked Questions". A breadcrumb trail reads: "Welcome Page > CAHC List - Provider View > View Clinic Details > Billing". On the right, it says "Logged in as Provider Test - My Account - Log Out". The main heading is "Example school wellness program". Below this is "Example fiduciary" and a note: "This report is required **once annually**, as part of the year-end report due by October 30 each year." The "Enter Data" section has two buttons: "Add Billing Data" (highlighted with a red arrow) and "Add Claim Denial Information". Below this is a "View Billing Data" table with columns: "Fiscal Year", "Insurance Category", "Claims Submitted", "Claims Received", and "Edit Data". The table currently shows "No Data". Below the table is a "View Claim Denial Information" section, also showing "No Data". At the bottom left is a link: "Back to View Clinic Details".

A data entry form will display. Select the current fiscal year for which you are reporting from the drop down menu. Under the "Insurance Category" field, select a Medicaid Health Plan, Medicaid Fee for Service, Commercial, Self-Pay or Other from the dropdown menu. Enter the dollar amount in claims submitted during the fiscal year regardless of whether or not claims were paid during the fiscal year, per the selected payor. Enter the dollar amount in claims received during the fiscal year regardless of whether or not the revenue resulted from claims filed during the fiscal year, per the selected payor. Click on the "Submit" button (see screenshot on following page).

Add Billing Data

Report the dollar amount in claims submitted for services provided from October 1 to September 30, regardless of whether or not the claims were paid this fiscal year. Report the dollar amount received in revenue from October 1 through September 30 regardless of whether or not revenue resulted from claims filed during the fiscal year.

Fiscal Year *
2018

Insurance Category *
Blue Cross Complete of Michigan

Claims Submitted (\$) *
12000

Claims Received (\$) *
6000

Submit

You will receive a message that the form was successfully submitted. Select the "Reload the Form" hyperlink to enter information for another payor, repeating the process until data for all payors are reported. After all data is reported, select the "Back to Billing" hyperlink at either the top or bottom of the page (see screenshot below) to return to the "Billing Report" main page.



Add Billing Data

Report the dollar amount in claims submitted for services provided from October 1 to September 30, regardless of whether or not the claims were paid this fiscal year. Report the dollar amount received in revenue from October 1 through September 30 regardless of whether or not revenue resulted from claims filed during the fiscal year.

Form successfully submitted.

[Reload form](#)

Powered by Knack

[Back to Billing](#)

Select either hyperlink to return to Billing Report main page

On the "Billing Report" main page, under the "View Billing Data" section, you will see a table displaying the reported claims and revenue information by payor. As you review data, if you see an error, select the "edit" hyperlink in the far right column that corresponds to the data (row) which requires editing (see screenshot on following page). The form will reload and you can make the necessary edits (e.g., correcting the payor name and/or dollar amounts). (Note: if you inadvertently entered data for a health plan for which you did not submit claims or receive reimbursement, you can zero out the dollar amounts.) When billing data entry is complete, you can select the "Add Claims Denial Information" radio button to continue with the next section of the Billing Report.

Example school wellness program

Example fiduciary

This report is required **once annually**, as part of the year-end report due by October 30 each year.

Enter Data

[Add Billing Data](#)
[Add Claim Denial Information](#)

Select to move to the second half of the billing report

View Billing Data

Fiscal Year 	Insurance Category	Claims Submitted	Claims Received	Edit Data
2018	Blue Cross Complete of Michigan	\$12,000.00	\$6,000.00	edit

Select to edit billing data

View Claim Denial Information

No Data

[Back to View Clinic Details](#)

A data entry form will display. Select the current fiscal year for which you are reporting from the drop down menu. Click on the checkboxes which correspond to the five most frequent reasons for denial of claims submitted during the current fiscal year. (These reasons are overall reasons for rejection of claims across payors.) In the textbox at the bottom of the form, you have the option to identify any Medicaid Health Plan with whom your health center had significant rejection/reimbursement issues during the fiscal year along with a brief summary of these issues. Click on the "Submit" button (see screenshot below).

Fiscal Year *

2018 

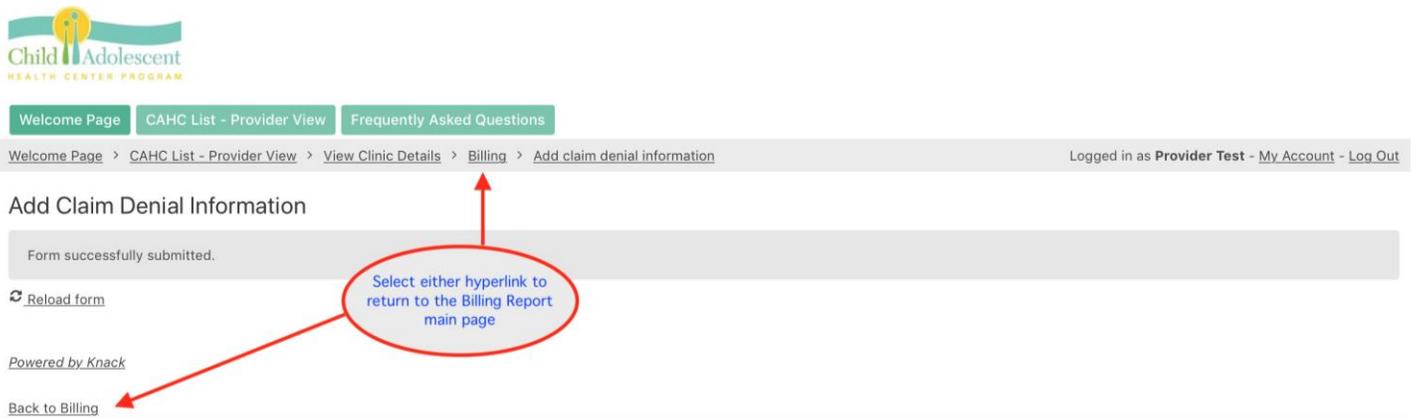
Select the five most frequent reasons for denial of claims submitted during the current fiscal year.

- Insufficient information on coordination of benefits
- Incorrect insurance entered for date of service
- Service provided after termination of client coverage
- Maximum benefit reached
- Time limit for filing expired
- Coding errors
- Diagnosis code not payable or not a covered benefit
- No prior authorization
- Not a known beneficiary
- Provider not credentialed with plan
- Out of network provider
- Other

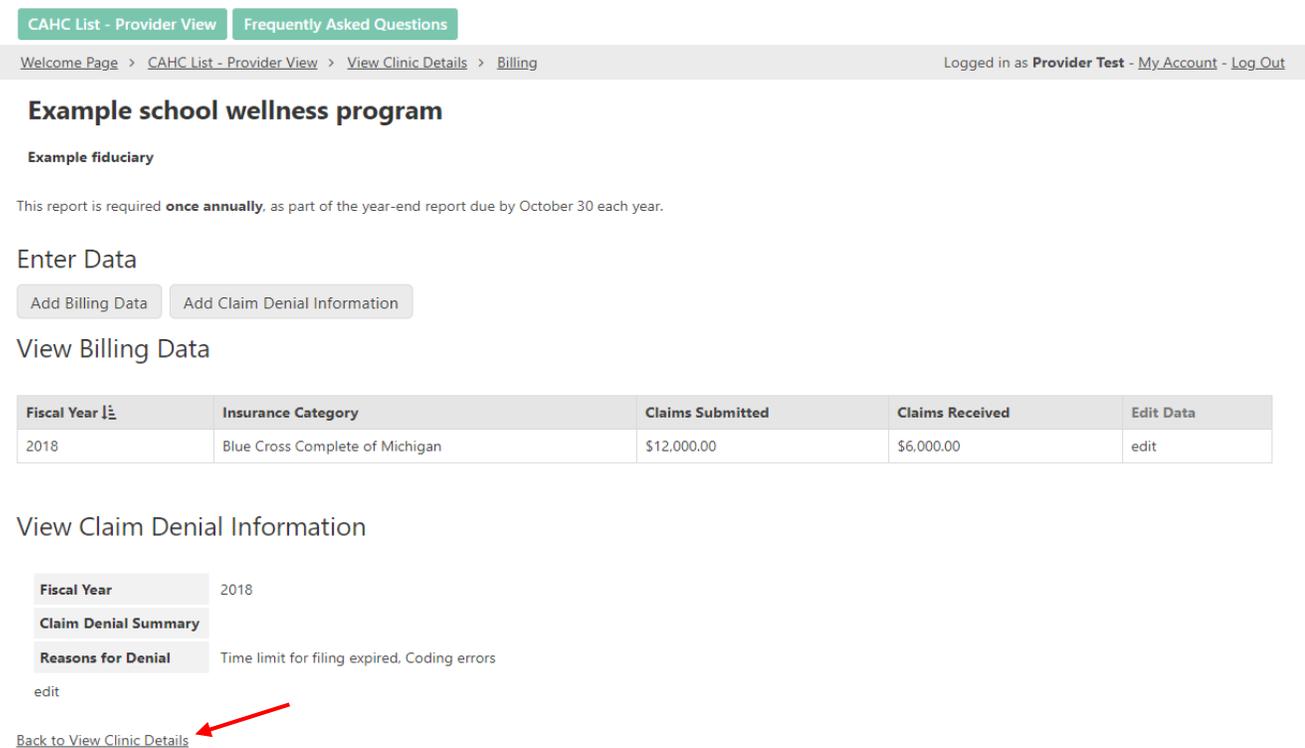
Identify the Medicaid Health Plan(s) which denied the most claims during the current fiscal year and BRIEFLY summarize issues experienced with this plan(s).

Submit 

You will receive a message that the form was successfully submitted. Select the “Back to Billing” hyperlink at the bottom of the page or the “Billing” hyperlink at the top of the page to return to the “Billing Report” main page (see screenshot below).



On the “Billing Report” main page, under the “View Claim Denial Information” section, you will see a summary of the claims denial information. As you review data, if you see an error, select the “edit” hyperlink that corresponds to the data which requires editing (see screenshot below). The form will reload and you can then edit the data.



To view the complete annual billing report, navigate back to the site’s main page by selecting the “View Clinic Details” hyperlink at either the top or bottom of the page. From the site’s main page, click the “Annual Billing Report” radio button under the “View Reports” section.

Top Diagnoses (Top Five Diagnoses and CPT Codes)

The process for entering and editing data is the same for the diagnoses and CPT codes. Therefore, the process for entering and editing data will be described once, using data entry for top five mental health problem diagnoses as an example.

From the site's main page, select the "Add Top Mental Health Problem Diagnoses" radio button under the "Enter or Edit Data" section. You will now see a series of radio buttons for top primary diagnoses, medical problem diagnoses, mental health problem diagnoses and CPT codes; followed by a series of tables which will display data once entered (see screenshot below). You will ignore the "Add Top Primary Diagnoses" and "Add Top Medical Problem Diagnoses" radio buttons as you will not enter this data for the SWP model.

The screenshot shows a web interface for 'CAHC List - Provider View'. The breadcrumb trail is 'Welcome Page > CAHC List - Provider View > View Clinic Details > Top Diagnoses'. The user is logged in as 'Provider Test'. The page title is 'Example school wellness program' for 'Example fiduciary'. A note states: 'This report is required **once annually**, as part of the year-end report due by October 30 each year.' The 'Add Data' section contains four buttons: 'Add Top Primary Diagnoses', 'Add Top Medical Problem Diagnoses', 'Add Top Mental Health Problem Diagnoses' (highlighted with a red arrow), and 'Add Top CPT Codes'. Below are two empty tables for 'Top Five Mental Health Problem Diagnoses' and 'Top Five CPT Codes', both showing 'No Data'. A 'Back to View Clinic Details' link is at the bottom.

Data Entry Process Example: Top Five Mental Health Problem Diagnoses

Select the "Add Top Five Mental Health Problems Diagnoses" radio button from the "Add Data" section on the "Top Diagnoses" main page. A data entry form will display (see screenshot on following page). Select the current fiscal year from the dropdown menu. There are five fields for entering the codes, the descriptions (names/titles of the diagnoses or procedures) and the frequencies. Begin by starting with the most frequent code in form field 1. Tabbing will move you through the form vertically, therefore you will complete all codes first, followed by descriptions, and finishing with frequencies. When you are finished entering data, select the "Submit" radio button.

Add Top Five Mental Health Problem Diagnoses

Provide the top five mental health PROBLEM diagnoses (from the mental health provider) for the selected fiscal year.

Fiscal Year *

1. Code *	1. Description *	1. Frequency *
<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Code *	2. Description *	2. Frequency *
<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Code *	3. Description *	3. Frequency *
<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Code *	4. Description *	4. Frequency *
<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Code *	5. Description *	5. Frequency *
<input type="text"/>	<input type="text"/>	<input type="text"/>

You will receive a message indicating your form has been successfully submitted. You will see a "Return to Top Diagnoses" hyperlink at the bottom of the page and a "Top Diagnoses" hyperlink at the top of the page. Click on either link to return to the "Top Diagnoses" main page where you can continue data entry for other diagnoses/CPT codes by selecting the corresponding radio buttons; and also to view data entries.

When reviewing your data, use the scroll bar to scroll to the far right, to the end of the table. If you see data that requires editing, click on the "edit" hyperlink in the far right column. The form will reload and you will then be able to edit data. After editing data, click the "Submit" radio button.

Viewing Reports

On your SWP site main page, you will also see two series of radio buttons: a series for viewing reports (View Reports) and a series for entering and/or editing report data (Enter or Edit Data). Reports will populate after data has been entered.

To print any report, click on the "Print" hyperlink in the top right corner of the report's page.

You can navigate back to the SWP site main page by selecting the "View Clinic Details" hyperlink or select the "CAHC List – Provider View" radio button or hyperlink at the top of the page to navigate back to your main access page.

Viewing the Quarterly Data Report

Navigate to the health center's main page by selecting the "View Clinic Details" hyperlink at the top of the page and click the "Quarterly Report" radio button under the "View Reports" section (see screenshot below).

The screenshot shows the 'View CAHC Details' section with fields for CAHC Name, Model, Linkage Type, Fiduciary Organization, Consultant, and Location. Below this is the 'View Reports' section with three buttons: '2018 Quarterly Report', '2018 Annual Billing Report', and '2018 Financial Status Report'. A red arrow points to the '2018 Quarterly Report' button. Below that is the 'Enter or Edit Data' section with various buttons for different report types. At the bottom is a 'Back to CAHC List - Provider View' link.

The report will populate with a combination of graphs, charts and tables displaying reporting elements, including quality measures. (see screenshot below for example).

The screenshot shows the '2018 Quarterly Report' for 'Example school wellness program'. It includes a table for 'Unduplicated Users' and a section for 'Users by Race'.

Fiscal Year	Quarter	Gender	0 through 4	5 through 9	10 through 17	18 through 21	Total Users
2018	3	Male	2	0	100	0	102
		Total	2		100		102

Users by Race

Fiscal Year	Quarter	White	Black / African American	Asian	Native Hawaiian / Pacific Islander	American Indian / Alaskan Native	More than One Race	Total Users
No Data								

Viewing the Annual Billing Report

Navigate to the site's main page by selecting the "View Clinic Details" hyperlink at the top of the page. Select the "Annual Billing Report" radio button under the "View Reports" section (see screenshot below).

The screenshot shows the 'View CAHC Details' section with the following information:

CAHC Name	Example school wellness program
Model	School wellness program
Linkage Type	School Based
Fiduciary Organization	Example fiduciary
Consultant	Test Staff
Location	Saginaw County

Below this is the 'View Reports' section with three buttons: '2018 Quarterly Report', '2018 Annual Billing Report' (highlighted with a red arrow), and '2018 Financial Status Report'.

The 'Enter or Edit Data' section contains the following buttons: 'Unduplicated Users', 'Users by Race', 'Users by Ethnicity', 'Visits', 'Physical Exams and Immunizations', 'Medical Tests', 'RN Services', 'Medicaid Outreach', 'Health Education', 'Quality Measures', 'Budget and Expenditures', 'Billing', 'Top Diagnoses', and 'Referrals'.

At the bottom left, there is a link: [Back to CAHC List - Provider View](#)

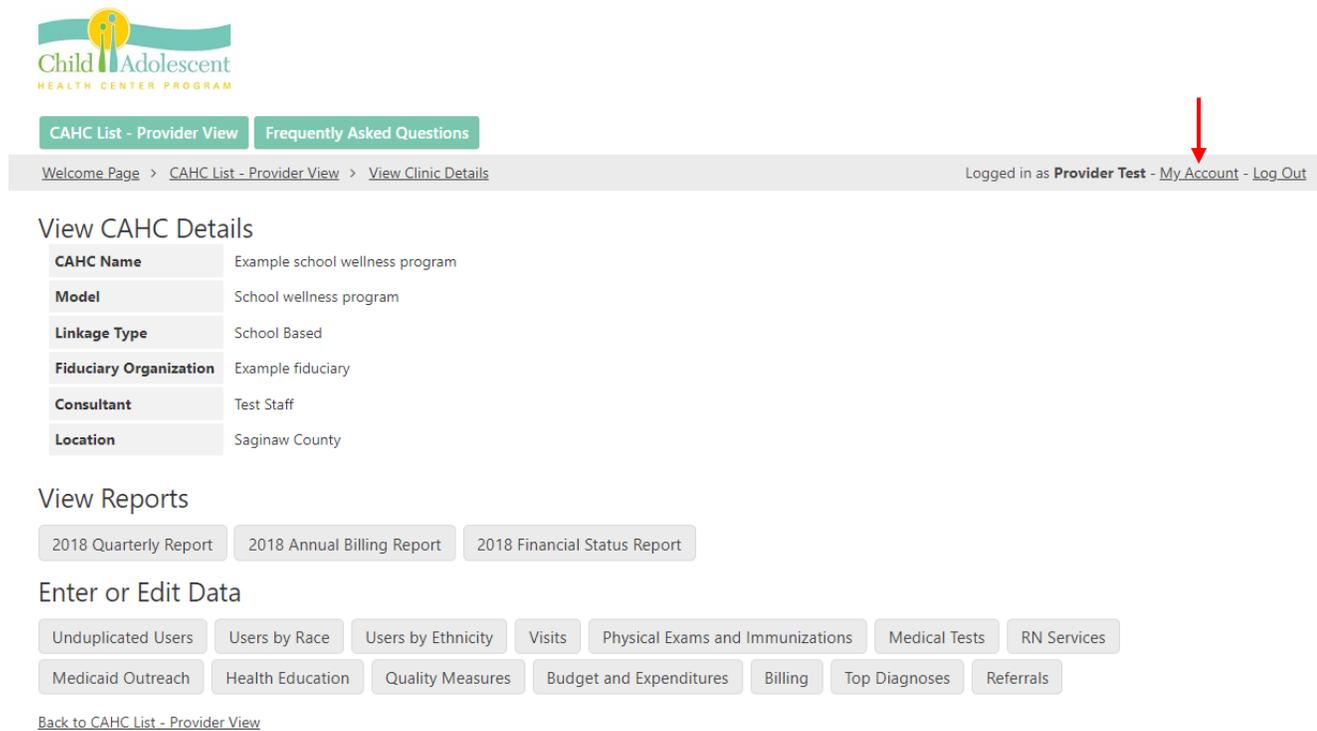
The Annual Billing Report contains a table displaying the dollar amounts of claims submitted and reimbursement by individual payor, as well as pie charts displaying the (estimated) percent of claims paid by major payor categories (e.g., all Medicaid Health Plans, Commercial, Self-Pay and Other). There is also a bar graph depicting (an estimated) percent of claims paid by individual Medicaid Health Plan. A pie chart displaying payor mix is also included, displaying percentage of revenue received by major payor categories.

Changing your Password

Changing your Password

As a system security and user maintenance feature, you will be prompted to change your password at regular intervals. If your password is not changed by the deadline set forth in the reminder, further system access will be denied and you will need to contact a system administrator for assistance.

You can also change your password at any time by clicking on the “My Account” hyperlink in the top right hand corner (see screenshot below).



The screenshot shows the top navigation bar of the Child Adolescent Health Center Program website. The logo is on the left, followed by two menu items: "CAHC List - Provider View" and "Frequently Asked Questions". Below the logo is the text "Child Adolescent HEALTH CENTER PROGRAM". The breadcrumb trail reads "Welcome Page > CAHC List - Provider View > View Clinic Details". On the right, it says "Logged in as Provider Test - My Account - Log Out". A red arrow points to the "My Account" link. Below the navigation bar, the "View CAHC Details" section shows a table with fields: CAHC Name (Example school wellness program), Model (School wellness program), Linkage Type (School Based), Fiduciary Organization (Example fiduciary), Consultant (Test Staff), and Location (Saginaw County). The "View Reports" section has three buttons: "2018 Quarterly Report", "2018 Annual Billing Report", and "2018 Financial Status Report". The "Enter or Edit Data" section has two rows of buttons: "Unduplicated Users", "Users by Race", "Users by Ethnicity", "Visits", "Physical Exams and Immunizations", "Medical Tests", "RN Services" in the first row; and "Medicaid Outreach", "Health Education", "Quality Measures", "Budget and Expenditures", "Billing", "Top Diagnoses", "Referrals" in the second row. A "Back to CAHC List - Provider View" link is at the bottom left.

Child Adolescent HEALTH CENTER PROGRAM

CAHC List - Provider View Frequently Asked Questions

Welcome Page > CAHC List - Provider View > View Clinic Details Logged in as **Provider Test** - [My Account](#) - [Log Out](#)

View CAHC Details

CAHC Name	Example school wellness program
Model	School wellness program
Linkage Type	School Based
Fiduciary Organization	Example fiduciary
Consultant	Test Staff
Location	Saginaw County

View Reports

[2018 Quarterly Report](#) [2018 Annual Billing Report](#) [2018 Financial Status Report](#)

Enter or Edit Data

[Unduplicated Users](#) [Users by Race](#) [Users by Ethnicity](#) [Visits](#) [Physical Exams and Immunizations](#) [Medical Tests](#) [RN Services](#)

[Medicaid Outreach](#) [Health Education](#) [Quality Measures](#) [Budget and Expenditures](#) [Billing](#) [Top Diagnoses](#) [Referrals](#)

[Back to CAHC List - Provider View](#)