Verifying correct Health Home Choice & Assessment Type in the UAS-NY (Attachment B)

This document outlines the steps for Health Home Care Management Agencies (CMAs) to verify correct Health Home choice and assessment type choice on CANS-NY Assessments in the UAS-NY.

Reminders:

- As long as your organization has attested to a business need to view member's information within the UAS-NY, and that functional consent has been obtained by your organization, the member will be added to your organization's case list. This will enable your organization to pull aggregate reports of members in your Health Home CMA.
- You can pull an aggregate report of all members on your UAS-NY case list as a way to verify if a correct Health Home and assessment type has been selected on a CANS-NY assessment. You can also use the Statewide Search Function in the UAS-NY to verify the correct Health Home/assessment type has been selected on a CANS-NY assessment.

Verifying the correct Health Home and Assessment Type has been selected on CANS-NY assessments in the UAS-NY using the aggregate report function (Health Home CMA)

1. Log in to the UAS-NY as a CANS-NY 15 or CANS-NY 50
2. Scroll over "Reports"
3. Select, "Aggregate Reports"
4. Select from list of Report Selection – CANS-NY Finalized Assessments or CANS-NY Assessments Not Finalized
5. Select Start Date and Select Stop Date (Can be up to a 12-month timeframe)
6. Currently Selected Organizations – is your CMA
7. Organization created by – do not filter and any Health Home selected on a CANS-NY will appear in your aggregate report (as long as your organization has created a case list)
8. Assessment Type – Select "All Assessment Types"
9. Select "Generate Report"
10. Review aggregate report member information for correct Health Home and assessment type selection

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Verifying the correct HH/Assessment Type has been selected using the Statewide Search Function (Health Homes and CMAs)

Please note that if your organization has not added members to your UAS-NY case list, **you will not be able to pull aggregate reports** and the only way to verify the correct Health Home has been selected on a CANS-NY assessment in the UAS-NY would be to manually search for a member using the statewide search function:

1. Log in to the UAS-NY
2. Select the Statewide Search option from the Search Menu
3. At the statewide search window, required search fields are noted by a red asterisk. You must enter data to:
   - Person's Last Name
   - Person's First Name or Initial

In addition, you are required to enter information to at least one field noted by a blue asterisk.

   - Date of Birth
   - Social Security Number
   - Medicaid ID
   - TABS ID (CAS roles only)
   - PID (CANS-NY roles only)

4. To add a case file to the organizational case list, the case file must be selected from the statewide search results table. Before the case file can be opened and added, you will be required to affirm the attestation to your organization's legitimate business need to access the case file. After selecting the case file from the search results table:
   - Click on the Open Case File command button.
   - Important Note: You may be prompted to verify that a person's consent to share information has been captured prior to attesting. Consent is required to open a case file.
   - The page will refresh and the attestation will be displayed. After carefully reading the attestation and accepting the responsibilities it describes:
   •Click on the Attest for your organization command button.

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5. The page will refresh and the case file will open. The case file has been added to your organization's case list.
6. Open the member's CANS-NY assessment in question by selecting "Assessments" and the date of the assessment
7. Select the node, "Reference Date". CANS-NY Assessment Type will show the CANS-NY assessment type selected.
8. Select the node, "Intake/Demographics". Beneath "Organization on whose behalf this assessment was conducted" will be the Health Home selected by the user.

*If you are having difficulty locating a member using the Statewide Search, please refer to UAS-NY course 1200-Managing Your Organization's Case List