REGION 10 PREPAID INPATIENT HEALTH PLAN
Promoting Opportunities for Recovery, Discovery, Health and Independence

PI SUD Appointment Tracker

Region 10 is required to report Performance Indicators (PIs) to MDHHS on a quarterly basis and maintain related documentation. Performance indicators 2b and 4b are relevant to our Susbtance Use Disorder (SUD) network. The attached template is in regard to Indicator 2b, as it is defined below.

Indicator 2b is defined as the percentage of new persons during the quarter receiving a face-to-face service for treatment or supports within 14 calendar days of a non-emergency request for service for persons with Substance Use Disorders.

For Indicator 2b, the PIHP is required to maintain documentation that includes dates offered, scheduled, declined, cancelled/rescheduled and/or no showed and the reasons why an individual wasn't admitted within 14 days of the request for services. PI 2b tracks consumers from the initial request to the date of admission or until 60 days after the initial request, whichever comes first. Therefore, you should track consumer contacts and appointment dates through the admission or the end of 60 days. Admission dates used in the Performance Indicator rates are calculated by MDHHS and include service start dates as reported on the BH-TEDS admissions records. Individuals who are not admitted will then not have an admission date.

In past quarters, Region 10 staff contacted our providers for more information when we were unable to retrieve sufficient information from MIX. To add efficiencies and to take a proactive approach in gathering the required information, we have created a template to aid staff in keeping track of the appointment trail and details relating to the status of those appointments. The document is attached.

Providers will utilize the Quarterly Appointment Tracking Spreadsheet to maintain a record of Region 10 SUD client appointments offered, scheduled, declined, cancelled/rescheduled and/or no showed. Any details that will help explain why an appointment was missed, cancelled, or rescheduled should be noted in the spreadsheet. This spreadsheet is due to the PIHP by the 15th of the month following the end of the quarter.

Please follow the guidelines listed below for using the *Quarterly Region 10 Client Appointment Tracking spreadsheet*:

1. Begin by ensuring you are working in the correct tab for the quarter. The tabs are located along the bottom of the worksheet. For example, first quarter will be the first tab, "Qtr 1 (Oct-Dec)".
    a. If a client is referred at the end of the quarter, copy their row from the current quarter's tab, into the next quarter's tab in order to continue tracking this client through admission.
2. When an intake appointment is scheduled, fill in the following fields of the spreadsheet: Consumer Name, PIHP Case #, Request Date, First Scheduled Assessment/Admission Appointment, Referral Date, Appointment Status, Expiration Date. The First Scheduled Assessment/Admission Appointment will typically be the date that Region 10 Access set up/coordinated.
3. In the Appointment Status column, mark whether the appointment was kept, no showed, cancelled, or rescheduled. This column is only for the original appointment.
4. The Notes column is to be used to document the reasons for cancelled or rescheduled appointments (client was sick, had a transportation issue, etc). It is important to note all appointment dates offered/declined/rescheduled in this column. Also use this space to document non-admittable consumers in cases when appointments are kept but the individual was not admitted to the agency.
5. This spreadsheet is due to Region 10 PIHP no later than the 15th of the month following the end of the quarter. Please make a copy of the spreadsheet, upload it and send via MIX message to Tayler Job, Heather Shellenbarger, and Nancy Scott.

Region 10
Prepaid Inpatient Health Plan

PI SUD Appointment Tracker
Provider Name:
Date Range: Qtr 1 (October - December)

Consumer Name	PIHP Case #	Request Date	First Scheduled Assessment/Admission Appointment	Referral Date	Appointment Status (Was Admission appointment kept, no showed, cancelled/rescheduled)	Expiration Date	Notes:

REGION 10

Prepaid Inpatient Health Plan

PI SUD Appointment Tracker

Provider Name:

Date Range: Qtr 2 (January - March)

Consumer Name	PIHP Case #	Request Date	First Scheduled Assessment/Admission Appointment	Referral Date	Appointment Status (Was Admission appointment kept, no showed, cancelled/rescheduled)	Expiration Date	Notes:

PI SUD Appointment Tracker

Provider Name:

Date Range: Qtr 3 (April - June)

Consumer Name	PIHP Case #	Request Date	First Scheduled Assessment/Admission Appointment	Referral Date	Appointment Status (Was Admission appointment kept, no showed, cancelled/rescheduled)	Expiration Date	Notes:

PI SUD Appointment Tracker
Provider Name:
Date Range: Qtr 4 (July - September)

Consumer Name	PIHP Case #	Request Date	First Scheduled Assessment/Admission Appointment	Referral Date	Appointment Status (Was Admission appointment kept, no showed, cancelled/rescheduled)	Expiration Date	Notes: