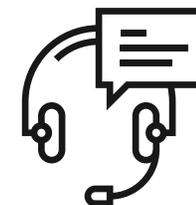




# IS YOUR BEHAVIORAL HEALTH CLINIC INTERESTED IN THE COLLECTIVE PLATFORM?

FOLLOW THIS GUIDE TO GET STARTED.

UPDATED SEPTEMBER 2022



## BACKGROUND

Learn more about privacy and consent within the collective platform

See [Page 2](#) & [Page 3](#)

## STEP 1

Complete and submit the provider discovery form

See [Page 4](#), [Page 5](#), & [Page 6](#)

## STEP 2

Receive an automated message with a ticket number to track request. Review [Resources for More Information](#).

See [Page 7](#)

## STEP 3

An onboarding specialist reaches out with next steps to onboard the behavioral health clinic

See [Page 8](#), [Page 9](#), & [Page 10](#)



## 42 CFR PART 2

42 CFR Part 2 is an added level of privacy for patients with relationships with substance use disorder (SUD) treatment facilities. Importantly, part 2 applies to a setting, not to content. This means that SUD content coming from an ED does not require consent to be shared, while content coming from a SUD treatment facility (a Part 2 covered entity) does require consent in order to be shared.

## COLLECTIVE PLATFORM CONSENT: HOW IT WORKS

"Sensitive Information" was never meant to be "Siloed Information". In most cases, granting consent only gives a provider permission to share patient information with another specific provider organization.

With the Collective Platform's consent format, behavioral health information can be shared when it's needed, with the providers who need it--all while remaining within the revised guidelines set by SAMHSA. Using the standard Collective Consent Form, a patient can give **full consent, partial consent, or no consent**, for behavioral health information to be shared. Consent can be revoked at any time.

Sensitive information may be disclosed via the Collective Network, only where the facility has indicated, based on the type of consent provided.

A full webinar on how Behavioral Health Providers can Optimize the Collective Platform is available [here](#).

You must have access to Collective Community in order to access the webinar. If you don't have access, you can request it [here](#).

## THERE ARE THREE TYPES OF CONSENT MESSAGES



### 1. NO CONSENT

No consent is the default setting for consent enabled portals. All sensitive information from a facility using Collective's consent model is housed within a separate consent enabled portal. This makes the facility's relationship to the patient invisible by default to the rest of the Collective Network.



### 2. PARTIAL CONSENT

Only the facility's relationship to the patient and any encounters at this facility are shared via the Collective Network to the patient's other treating providers.



### 3. FULL CONSENT

The facility's relationship to the patient, the patient's encounter history at this facility, and any other content generated by this facility on the Collective Platform are shared via the Collective Network to the patient's other treating providers.



# STEP 1: COMPLETE AND SUBMIT THE PROVIDER DISCOVERY FORM

The first step in gaining access to the Collective Platform is to complete and submit the Provider Discovery Form. There are two options for completing this form:

## OPTION 1: COMPLETE THE DISCOVERY FORM INDEPENDENTLY

### OVERVIEW OF PROCESS

1. Visit the following URL for the Discovery Form:  
<https://www.tfaforms.com/4676242>
2. There are four pages to the form:
  - a. Your information
  - b. Organization's information
  - c. Contact information
  - d. Personnel & patient services information, technical information, and additional information
3. All pertinent information must be inputted in order for the onboarding process to begin.

**(See [page 5](#) and [page 6](#) of this toolkit for an overview of all information required for the Discovery Form).**

## OPTION 2: REACH OUT TO THE COLLECTIVE MEDICAL SUPPORT TEAM TO GET STARTED

### SAMPLE EMAIL TEMPLATE

**Address:** support@collectivemedical.com

**Subject:** Behavioral Health Clinic request for Collective Platform Access

**Message Body:**

Support Team,

Our behavioral health clinic [Name] would like to begin the onboarding process with the Collective Platform.

Please be in touch with the next steps.



# STEP 1: COMPLETE AND SUBMIT THE PROVIDER DISCOVERY FORM

## What is a Discovery Form?

This 'Discovery' form is intended to collect important information about your organization as well as confirm key contact information. The Discovery form will assist the Collective Medical team with better understanding your organization and providing assistance in the future. You can find the Discovery Form online here: <https://www.tfaforms.com/4676242>

## What information is required to complete a Discovery Form?

There are four main pages to the Discovery Form, each with its own set of required information.

### Page 1) Your Information

- This page obtains the contact information for the individual filling out the form. Input your name, job title, email, phone, and how you learned about Collective Medical.

### Page 2) Organization Information

- This page obtains information about the organization that will be using the Collective Platform. Key elements that are required on this page include: **Organization NPI, DBA/Preferred Name, NPI Taxonomy Description, Organization Contact Information, whether a health plan or ACO is sponsoring implementation, and if the organization has multiple locations or other affiliations.**

### Page 3) Contact Information

- This page obtains contact information for the individuals responsible for implementation. Required information includes:
  - **Primary contact:** Individual that will be responsible for project management.
  - **Clinical contact:** Individual that will be responsible for training and use.
  - **IT Contact:** Individual that will be responsible for the IT setup.
  - **Account Manager Contact:** Individual that will be responsible for managing the organization's Collective Medical account.
  - **Additional Contacts:** Any additional contacts that may be helpful during the implementation process.



# STEP 1: COMPLETE AND SUBMIT THE PROVIDER DISCOVERY FORM

## What information is required to complete a Discovery Form? (continued)

### Page 4) Personnel & Patient Services, Technical, & Additional Information

- **Personnel & Patient Services Information**

- This section of the page obtains more information about your organization. Information includes:
  - Does your organization have a direct healthcare relationship with a patient population?
  - Describe the patient services provided by your organization.
  - Classification of your organization (PCP, FQHC, SNF, BH, SUD, etc.)
  - 42 CFR part 2 protections
  - Information about personnel (directly employed, estimated number, participation in case management/utilization)
  - Participation in state or other incentive programs
  - What health plans (or ACO) is your organization a contracted provider for?
  - Is your organization fully capitated or receive capitated payments for any population or patients?

- **Technical Information**

- Are IT resources available? If so, are they provided internally or by an outside party?
- Does your organization use an EMR/EHR?
- Collective requires a 'Patient File' to be provided to Collective Medical on a regular interval (e.g., daily, weekly, or monthly). This file would include basic patient demographic information (name, DOB, address, phone, etc.). Would your organization be able to meet this requirement and provide an updated patient file on a regular interval?
  - For a description of Eligibility Files and their required processes, see [page 9](#) and [page 10](#) of this toolkit.

- **Additional Information**

- Anything else that you would like to ask or request of Collective that would be beneficial in implementation of the Collective Platform.



## STEP 2: RECEIVE A TICKET NUMBER TO TRACK REQUEST

Once you have submitted the Discovery Form, an Onboarding Specialist will be contacting you with any questions. While you wait for step three, there are many useful resources to help you get acquainted with the Collective Platform.

### Collective Community ("Help" section)

- Once you implement the Collective Platform, the Collective Community is available directly from the Help page within the platform.
- While you wait for full access to the Collective Platform, you can still request access to the Collective Community at:
  - <https://community.collectivemedical.com/>
  - You won't have access to PHI—just webinars, materials and other helpful resources.
- Within the Community, there's an Oregon Resources section:
  - <https://community.collectivemedical.com/tag/oregon-resources>
- Key Community resources:
  - [Collective Platform for Beginners](#)
  - [Oregon HIT Commons Care Coordination Tools for Behavioral Health](#)

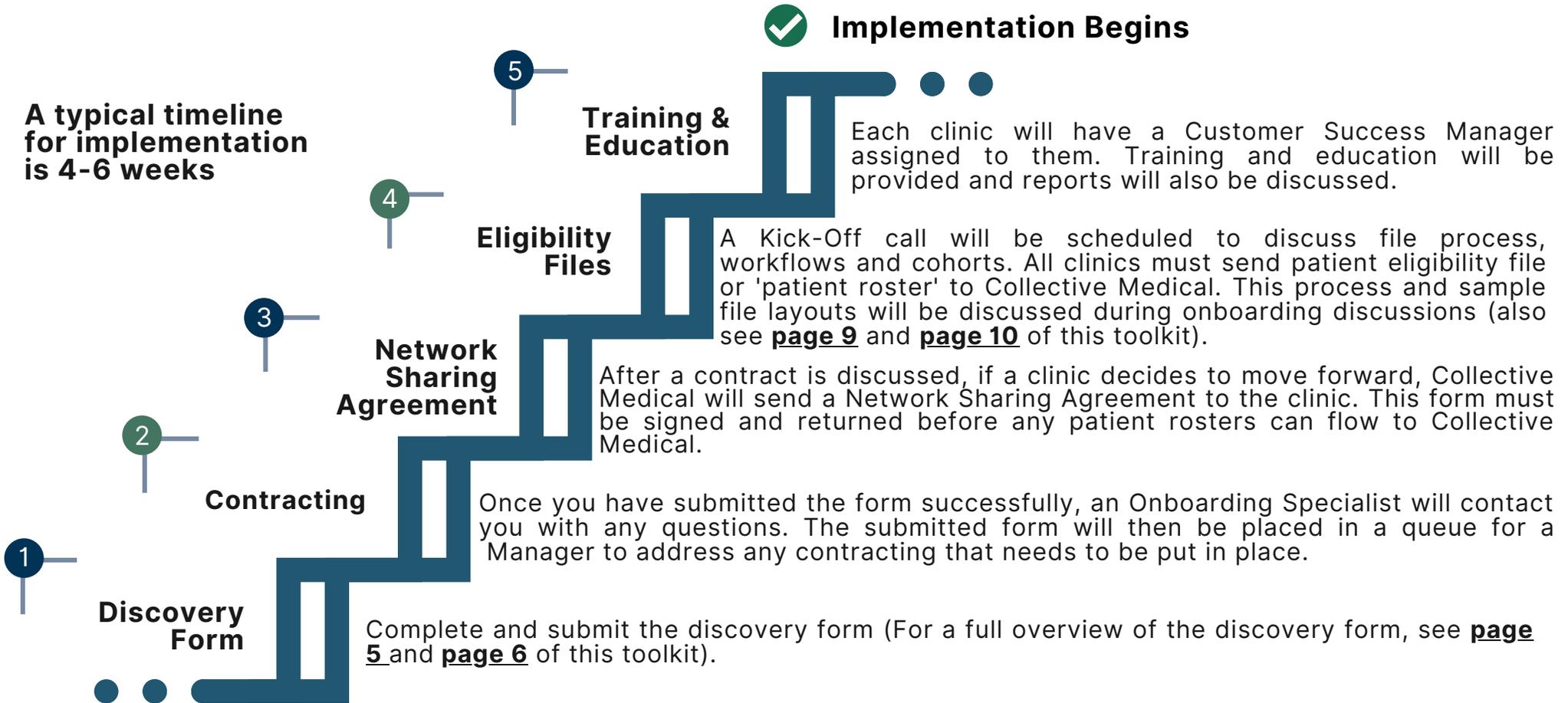
### HIT Commons Resources

- HIT Commons has multiple resources on their website to assist with the Collective Platform.
- [HIT Commons website](#)
- [General Resources](#)
  - [Getting Started with Collective Platform-an Implementation Guide for Clinics](#)
  - [Sharing Information on the Collective Platform: A Resource Guide for Users](#)
- [Webinars and Best Practices](#)
  - [Back to Basics Webinar](#)
  - [2021 Behavioral Health Collaborative Presentations and Recordings](#)

# STEP 3: COLLECTIVE SUPPORT TEAM REACHES OUT WITH NEXT STEPS TO ONBOARD THE CLINIC

FOR A BEHAVIORAL HEALTH CLINIC, WHAT DOES THE FULL ONBOARDING PROCESS LOOK LIKE?

A typical timeline for implementation is 4-6 weeks





# ELIGIBILITY FILE/PATIENT ROSTER LAYOUT

The eligibility file/patient roster is the source of truth and mechanism for how Collective manages consent. If consent is revoked, the eligibility file must be updated. An overview of eligibility files and consent can be found [here \(20:00 - 27:37\)](#).

## Eligibility File Layout

- Clinics are required to upload an eligibility file at a regular cadence (tbd during onboarding).
- Must be a .csv, .txt (pipe or tab).
- File names must remain consistent.
  - ex: Collective\_Medical\_01252021.csv (date can vary).
- Column headers, once established, must remain consistent.
  - ex: Date of Birth cannot be changed to DOB.
- Format for all date fields must contain a 4-digit year (2021).
- Column formats must remain consistent throughout the entire column.
  - Ex: can be one character (m/f) or full text (male/female) but not both.
- All members/patients must have a unique ID (MRN) that remains consistent with that member only.
- Leave blank values when information is not available.
  - No Null or N/A
  - No placeholders (ex: DOB 1/1/1900)
- Please include only active patients in file.

## Columns Headers for Behavioral Health Clinics

### • Standard Column Headers (Required)

- Unique Identifier (MRN)
- First and Last Names
- Date of Birth
- Gender
- SSN (if available)
- Address 1
- Address 2 (if applicable)
- City
- State
- Zip
- Phone Number
- Consent Disclosure Status (Y, N, NA or Blank)
- Date of Consent
- Date of Revocation

### • Care Team Column Headers (Optional)

- Provider Name
- Provider NPI
- Provider Facility Address
- Provider City
- Provider State
- Provider Zip
- Provider Phone Number
- Provider Taxonomy Code

**Full Eligibility File example excel sheet is available for download on Collective Community. [Link here.](#)**



# ELIGIBILITY FILES/PATIENT ROSTERS: COMMON ISSUES

A full webinar on Best Practices for building Eligibility Files can be found [here](#).  
You must have access to Collective Community in order to access the webinar.

## Most Frequent Issues with Eligibility Files

- Column headers have changed.
- Header rows not consistent.
- Date format change.
  - ex: 1/1/1900 to 1900/1/1
- Group values change.
- File name changes.
- New columns added.
- Not including your full active population.
- Adding SSN as a member ID.
- Not following the correct date format.
  - All dates must be a 4-digit value.
- Phone numbers and SSN containing dashes or nonnumeric values.
- Dropping leading zeros in any numeric value.
- If you add something new, be sure to update Collective Medical so that they can process those changes and recognize the change in your eligibility file.

## Automatic Email Confirmation

- Once Collective Platform is implemented, you can request an automatic email confirmation from Collective Support team that confirms files have successfully been received and processed.
  - Example: If you are sending eligibility files on a weekly basis, you will get an email each week that automatically confirms that you file has successfully been uploaded.
  - Email [support@collectivemedical.com](mailto:support@collectivemedical.com) to request this confirmation.
- If you ever need to update consent, be sure to update it both within the Collective Platform AND within eligibility file.
  - Revoking consent on the platform alone is not sufficient. The eligibility file must also be updated.

Full Eligibility File example excel sheet is available for download on Collective Community. [Link here.](#)



# TERMINOLOGY

**Collective Medical:** vendor of the Collective Platform and EDIE. Collective Medical operates the largest real-time care collaboration network in the United States which connects hospitals, emergency departments, skilled nursing facilities, primary care providers, mental and behavioral health clinics, and others to improve patient outcomes by closing the communication gaps that undermine patient care. The Collective Platform assists healthcare organizations and payers to facilitate actionable collaboration to make better care decisions.

**Collective Platform:** The Collective Platform (formerly known as PreManage) is a web-based platform with two applications. EDIE is the first application. The other application, often generally referred to as the Collective Platform or Collective Ambulatory, is the second application which is used in non-hospital facility types including primary care clinics, behavioral health organizations, CCOs, health plans, and others. Users can only see information on a patient with whom they have an established HIPAA-TPO relationship. This relationship is identified through an **eligibility file (patient roster)** provided by each organization to the Collective Platform. This information provides the ability to rapidly identify at risk patients or members and support them in getting the right care through improved care coordination.

**EDIE:** Emergency Department Information Exchange. EDIE is one of two applications of the Collective Platform, provided through Collective Medical. EDIE provides hospital facilities key care summaries for patients with high utilization of emergency department services and/or who have been identified to have complex care needs with care guidelines. EDIE queries for hospitals to see if a patient is in the system and meets criteria for a notification. The goal is to reduce unnecessary hospital services and improve outcomes.

**OHA, OHLC, and HIT Commons manage the EDIE Utility in Oregon which leverages the Collective Platform.**

**If you have any other questions or need more information please reach out to:**

**Collective Medical Support Team**  
support@collectivemedical.com

**HIT Commons**  
HITInfo@hitcommons.org