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Illinois Helpline for Opioids and Other Substances
Capacity Management System (CapMan) User Guide

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ILLINOIS HELPLINE
for Opioids & Other Substances

Help is here.

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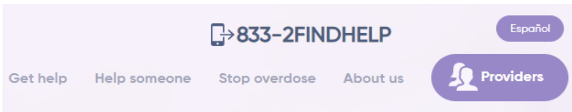
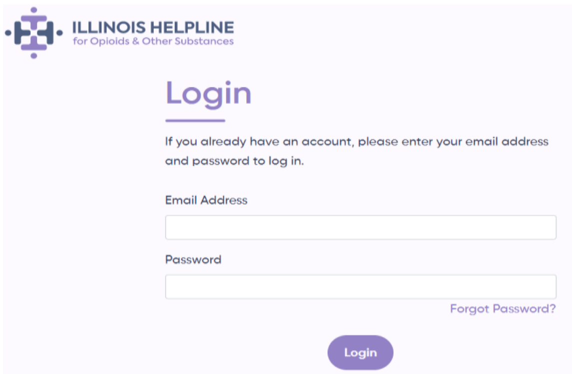
Getting Started – the basics

To start managing your capacity and waitlist(s), log into your Provider Portal account by visiting helplineil.org and clicking Providers (top right-hand side of Homepage).





This will bring you to the login screen. Log in using your Provider Portal account credentials.

After logging in, you will see the list of programs associated with your account.

Under the column labeled ***CapMan Type*** you will find the type of CapMan associated with each program.

- **Residential Treatment Providers** will see Residential CMS (Capacity Management System) listed.
- **OMT (Opioid Maintenance Therapy) Providers** will see OMT CMS (Capacity Management System) listed.

TEST AGENCY Apricot Agency • VIEW DETAILS

PROGRAM	CAPMAN TYPE	WAITING	RIN WAITING	STATUS
TEST PROGRAM Apple Program Updated 5700 Granite PKWY Plano 75024	Residential CMS	5	0	APPROVED
TEST PROGRAM Apple Program Updated 5700 Granite PKWY Plano 75024	OMT	0	0	APPROVED

The ***Waiting*** column displays the number of people currently waiting on your waitlist.

The ***RIN Waiting*** column, displays the number of people on your waitlist that are currently waiting to be assigned a RIN (Recipient Identification Number).

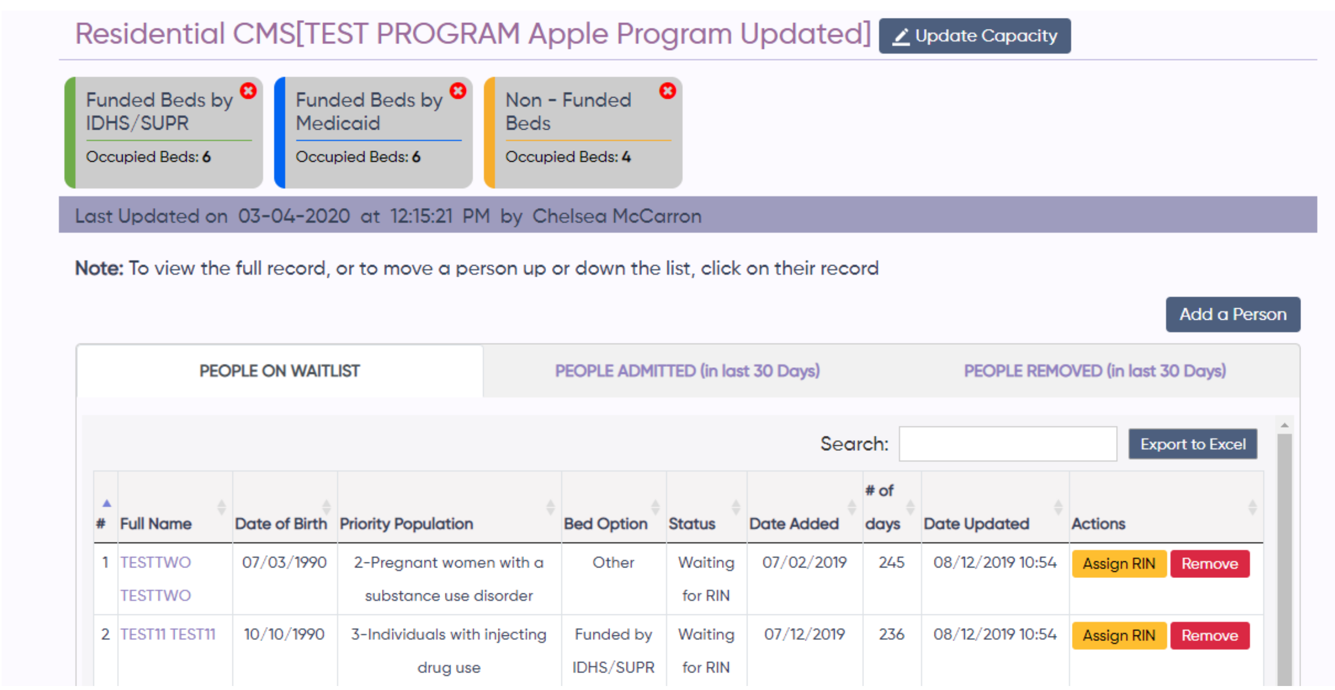
Please note: Programs cannot bill for services until a RIN is assigned. Adding a person to the waitlist without a RIN should be used for priority populations only.

To begin, select the CapMan type to the right of the program's name. The CapMan type names are clickable.

Outlined in yellow below.

Clicking on the CapMan type name will bring you to that program's CapMan landing page.

CapMan landing page example.



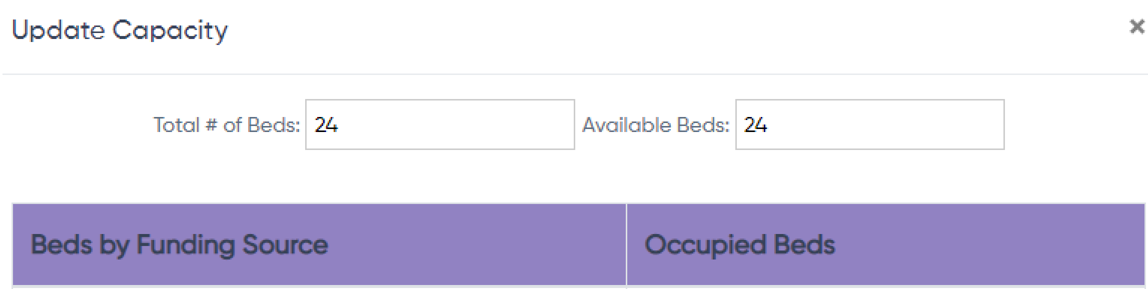
Updating Capacity

Residential Treatment and OMT program staff should **log in daily** to update the capacity for their program.

Residential Programs

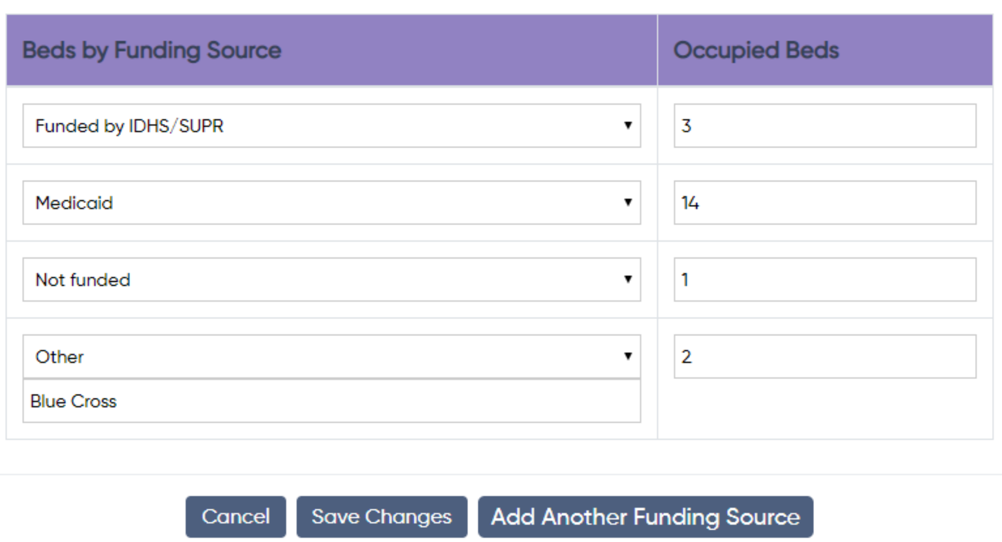
First time set-up

Select **UPDATE CAPACITY** to access the Update Capacity data field. In the Total # of Beds field, enter the total number of substance use treatment beds available at your facility. This number will remain static.



Next, to update current capacity, select the number of beds occupied by clients by their funding source. By default, the system will show funded by IDHS/SUPR under Funding Source. There are 3 additional funding options built into the system, and providers can add as many "Other" sources as desired.

- Select ***Add Another Funding Source*** to add additional funding sources.
- When you have added all funding sources, click ***Save Changes***.



After the funding sources, total bed number, and bed counts are added the first time, they will be saved by the system and always appear.

Providers will only need to update the Occupied Beds for each funding source daily.

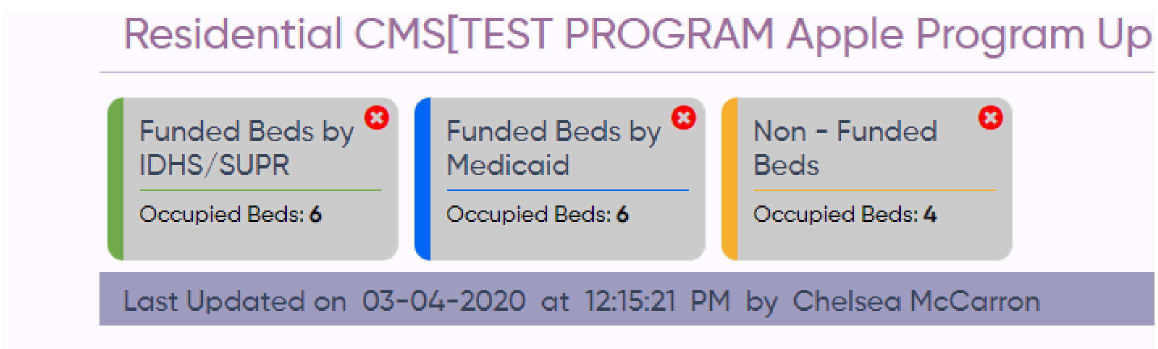
Ongoing maintenance

Each day**, program staff should update the occupied beds for each funding source.**

1. To update your program's capacity, click on the ***Update Capacity*** button to the right of the program name (found at the top of the screen)

2. This will bring up the Update Capacity screen where you can enter number of beds occupied per funding source. The occupied bed count will automatically deduct from the Total # of Beds, populating the Available Beds on the top of the page. Click ***Save Changes***.

3. After you have updated that day's availability, the system will display the time last time the system has been updated and by whom.

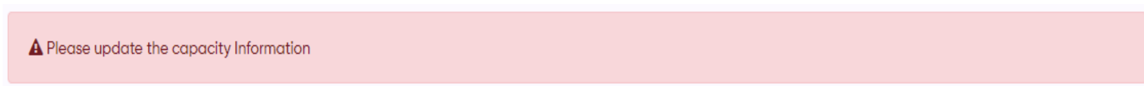


OMT Programs

OMT program staff should **log into the CapMan daily** and indicate if they are currently accepting clients for OMT services.

- You can do this by selecting either yes or no for "Are you accepting clients today?" (found under the program name at the top of the screen), then click ***Save***.

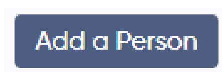
- If the capacity **is not updated within 24 hours**, providers will see the warning below displayed.



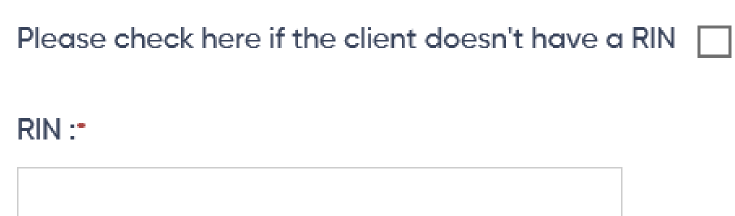
Editing Your Waitlist

Adding a client to your waitlist:

1. On your program's CapMan landing page, select ***Add a Person*** (found at the right-hand side of the screen above the waitlist).



2. Enter ***RIN*** and select ***Search.*** For clients awaiting a RIN assignment (please see *Clients without a RIN* for further instruction).



3. If a client ***has not*** been previously entered into the system, you will be asked if you'd like to add a new person.
    - Select ***Add a New Person*** (at the bottom left-hand side of the display box) to enter a new client. A new display box will appear. Complete the form to add the client to your waitlist.

4. If a client ***has*** previously been entered in the system, their name will appear, and you can select that person.
    - Update their personal and contact information to add them to your waitlist.
    - A form of contact is required when adding a person to the waitlist. If the client does not have a phone number, you may still add the person but are required to indicate an alternate form of contact in the ***Notes*** section.

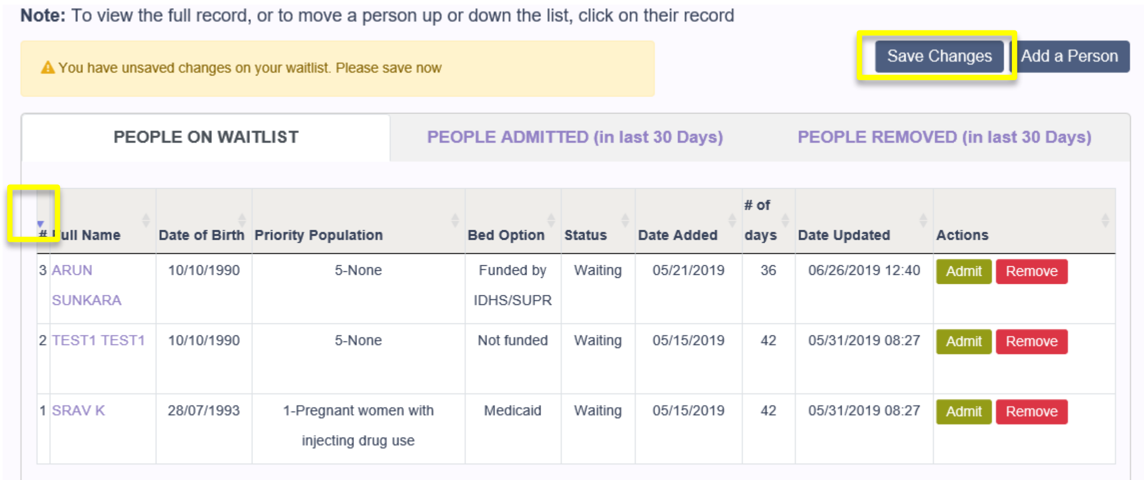
Moving a client position on your waitlist

You have the ability to move a client's place on your waitlist as you see fit. To move a client:

- Select the client you'd like to move and drag and drop their name into the desired spot.
- Click ***Save Changes*** to keep your changes.

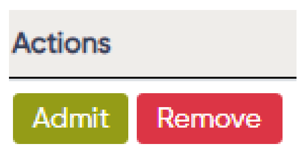
You can also use the triangle/arrow found at the top right corner of your waitlist to sort and view your list numerically in ascending or descending order.

Sorting and Save Changes buttons highlighted in yellow below.

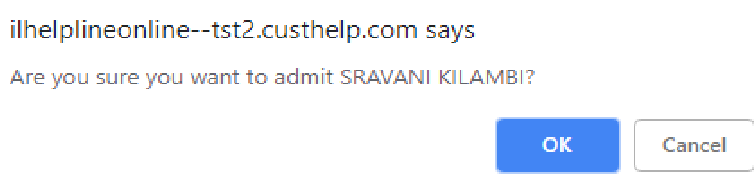


Admitting a client on your waitlist:

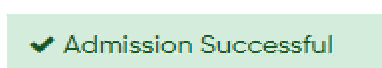
1. On your program's CapMan landing page, select the ***Admit*** button under the Actions column for the client you'd like to admit to your program.

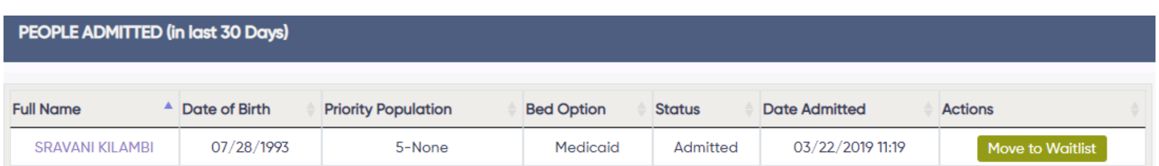


2. A dialog box will display, confirming that you'd like to admit the client.



3. A message of successful admission will display, and the client will be moved from your waitlist to the People Admitted (in the last 30 days) field.



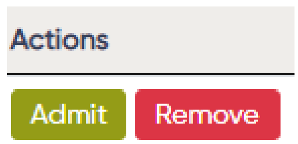


4. If you have accidentally admitted a client on your waitlist, you can move them back on to your waitlist by selecting ***Move to Waitlist*** (as pictured above). The client's *Date Added* will remain the original date they were added to your waitlist.

Removing a client from your waitlist:

Providers can remove clients from their waitlist when needed. Follow the process below if you need to remove a client from your waitlist.

1. On the CapMan, page select the ***Remove*** button under the Actions column for the client you'd like to remove from your waitlist.

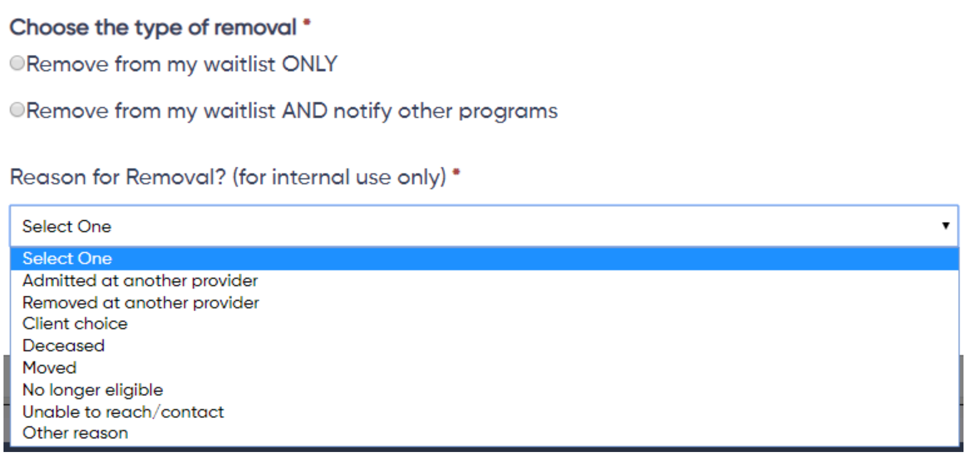


2. Select the reason for removal – this can only be seen internally even if you choose to notify other providers of the removal.

There are two options when removing a client from your waitlist:

- Option 1 - Removing a client from *ONLY* your waitlist.
- Option 2 - Removing a client from your waitlist *AND* notifying other providers.

Select either ***Remove from my waitlist ONLY*** or ***Remove from my waitlist AND notify others***.



***Remove from my waitlist AND notify others* option:**

This option helps to notify other providers that a client is being removed from a waitlist for reasons that are noteworthy and substantial. Examples include, if a client has passed away, moved out of state, or is currently incarcerated, etc.

The default option should be to remove clients from your program's waitlist only. Only notify other programs if the removal reason directly applies to other programs as well.

*Please note: If a client has been added without a RIN, you **will not** receive notifications or have the ability to notify other providers about this client's removal status until a RIN is entered.*

Clients removed from waitlist:
After a client has been removed form your waitlist, they will be moved into the ***People Removed in the last 30 Days*** field. Removed clients remain in this field for 30 days to give program staff the flexibility of quickly adding a client back to their waitlist, if needed.

You can add a removed client back to your waitlist by selecting ***Add to Waitlist*** under the Actions column. Their *Date Added* will remain the original date they were added to your waitlist, but the *Date Updated* will be current.

PEOPLE ON WAITLIST | PEOPLE ADMITTED (in last 30 Days) | PEOPLE REMOVED (in last 30 Days)

Full Name	Date of Birth	Priority Population	Bed Option	Status	Date Removed	Actions
TEST TEST	01/01/1990	2-Pregnant women with a substance use disorder	Medicaid	Removed	06/25/2019 01:05	Add to Waitlist

×Removal Reasons

Contact Name	Removal Reason	Removal Date
MARY POPPINS	Removed at another provider	03/12/2019

Close

You are also able to view removal reasons for all clients removed in the past 30 days by selecting ***View Removal Reasons***.

Provider notifications

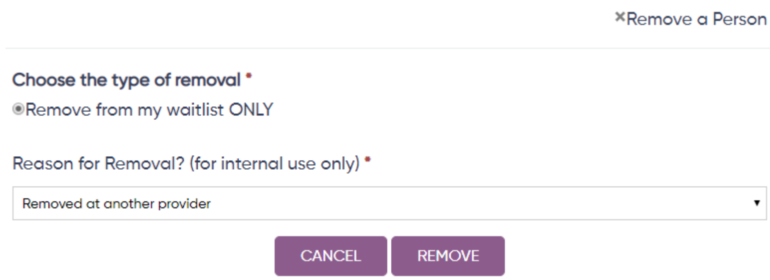
If you have been notified that a client on your waitlist has been removed or admitted by another provider, that clients name will be highlighted. The highlighted color is red for a removal and blue for an admission. You will have the option to either keep or remove that client.

#	Full Name	Date of Birth	Priority Population	Bed Option	Status	Date Added	# of days	Date Updated	Actions
1	⚠ NAVEEN CHERUPALLY	01/24/1990	3-Individuals with injecting drug use	Medicaid	Removed at another provider	03/22/2019	0	03/22/2019 13:26	Keep Remove

- To keep the client, select ***Keep***. A dialog box will appear to confirm that you want to keep the client.

- To remove the client, select ***Remove.*** A dialog box will appear for you to select a reason for removal.

The reason will default to 'Admitted at another provider' or 'Removed at another provider'. Select ***Remove*** on this window to remove the person or ***Cancel*** to keep them on your waitlist.



Clients without a RIN

Adding Clients without a RIN

If your client is of a **priority population *and* does not have a RIN**, select the checkbox to the right (shown below). Enter your client's first name, last name, and date of birth to search and add them to your waitlist. *A client without a RIN only populates to your program's waitlist and does not connect with any other programs or individuals in the system. You are not will not receive notifications about this client from other programs until a RIN is entered.*

Please check here if the client doesn't have a RIN ☑

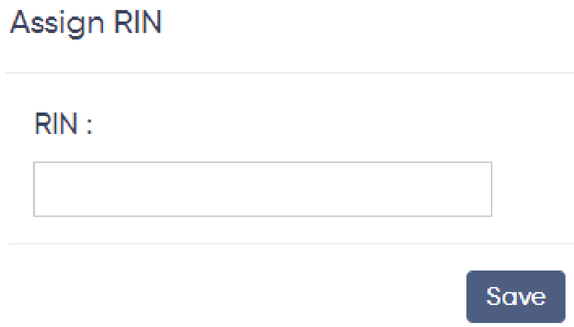
Note: Programs can not bill for services until a RIN is assigned. This option should be used for priority populations only.

Adding a RIN for clients already waiting

Clients added without a RIN will display on your waitlist with the option to add a RIN after they are assigned one. To request a RIN for your client, visit the IDHS website here.

3	TEST01 TEST01	01/01/1981	1-Pregnant women with injecting drug use	Funded by IDHS/SUPR	Waiting for RIN	04/26/2019	0	04/26/2019 11:28	Assign RIN Remove

To add a RIN after a client has been added to your waitlist, select **Assign RIN**. Enter the client's RIN and select save.



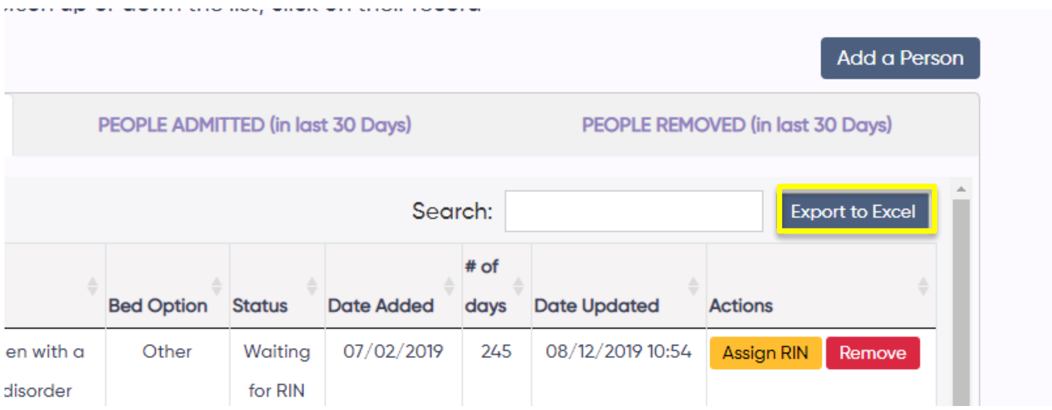
Add or remove client from your waitlist without a RIN

You can add and remove clients without a RIN to our waitlist, but their status cannot be changed to 'Admitted' until a RIN is entered. **Though this should not stop a provider from admitting a client for services**. A RIN will need to be added into the CapMan once it is assigned.

If a client is added without a RIN, you will not receive notifications or have the ability to notify other providers about this client's removal status until a RIN is entered. (Please see *Removing a Client from your waitlist* for more information.)

Reports

There are two ways to download data from the CapMan system. One, click the **Export to Excel** button located next to the *Search* field on each waitlist tab. This will create an excel file with correlating rows and columns.

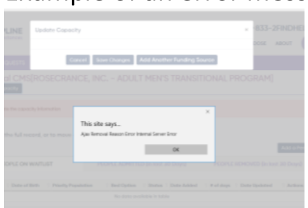
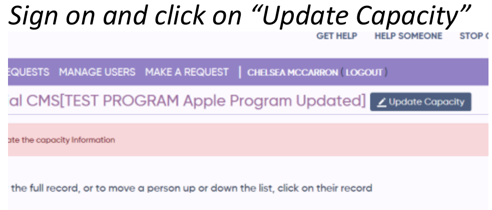


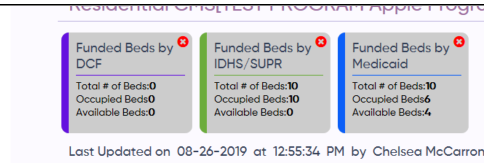
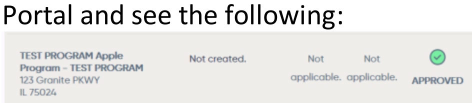
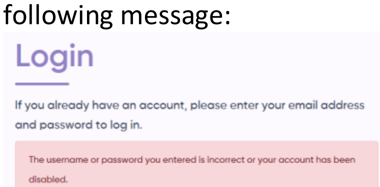
The second method of exporting data is by using the REPORTS section of the portal. Click REPORTS located on the navigation bar. This will navigate the user to a list of available reports filterable by various data fields. Reports include:

- Average wait time by waitlist
    - Filter by waitlist type, gender, priority population
- Average wait time across the region/state
    - Filter by waitlist type, gender, priority population, region
- Admitted Report
    - Filter by date rang, priority population
- Removed Report
    - Filter by date range, priority population
- Waiting Report
    - Filter by date range, priority population
- Interim Services Report
    - Filter by date range
- Capacity report by funding source
    - Filter by date range

Troubleshooting Guide

Below are the solutions to issues that may occur when using the CapMan system. For an issue or question not covered in this Capacity Management System User Guide or the Capacity Management System FAQ document, please reach out to a Helpline staff member via the Provider Portal at www.helplineil.org.

Issue	Description	Solution
No program visible	You have logged into the Provider Portal through the Helpline website and do not see your program or agency listed.	To see your program and agency in the Provider Portal, you must be associated with the program and have the correct permission levels. To be associated with your program, make a new request through the provider portal. To update your permission level for access to the CapMan and waitlist, contact your agency's SUPR administrative contact. You can also reach out to a Helpline staff member through the Provider Portal.
Error when saving capacity	Example of an error message: 	If you receive any error message from the CapMan system, please contact a Helpline staff member through the Provider Portal.
Total bed count is off	The bed count is not adding up correctly when entering the Capacity.	**Total # of Beds** refers to the total number of beds for the indicated funding source. Once the number of beds *per funding source* is entered, the system will combine each amount indicated for the total bed count for that program.
Deleting a funding source	Entered an incorrect funding source or the funding source has changed. How can it be corrected?	For ease of use, the system saves the most recent updated funding sources and number of beds for that source. If you need to delete a funding source, complete the following steps: *Sign on and click on "Update Capacity"*  *Complete the steps to update capacity, using "0" for Total # of Beds and "0" for occupied beds in the line for the funding source you plan to delete. Save your updates. You will be redirected to the home page with the funding source displayed.*

		 *For the funding source you wish to delete, click on the red x on the top, right hand corner of the box. The system will confirm your action, select "OK".* 
"Not created" and "N/A"	You have logged into the Provider Portal and see the following: 	This is not an error. Only programs that are licensed for service level 3.5 or OMT will be able to update capacity and access the waitlist functionality.
Gaining access to CapMan	You don't have the right permissions needed to update Capacity and the waitlist.	To gain access to your program's profile, CapMan and waitlist, contact your agency's SUPR administrative contact. You can also reach out to a Helpline staff member through the Provider Portal.
Trouble logging on	When logging in you keep receiving the following message: 	The message indicates that you are entering the wrong user name and/or password. Try resetting your information using the "Forgot Password" link. Also, be sure that you are on the correct webpage. The URL should read https://helplineil.org/app/utils/login_form
Wrong RIN entered	A client's RIN was entered incorrectly.	Contact a Helpline staff member through the Provider Portal. Once entered, a RIN can not be edited without assistance from Helpline IT.