

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

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# **Getting Started – the basics**

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

<b>□</b> →833-2FINDHELP	Español
ne Stop overdose About us	Providers
vou already have an account, please ent id password to log in.	ter your email address
issword	Forgot Password?

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 •						
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.

### CAPMAN TYPE PROGRAM **TEST PROGRAM Apple Residential CMS** Program Updated 5700 Granite PKWY Plano 75024 **TEST PROGRAM Apple** OMT Program Updated 5700 Granite PKWY Plano 75024

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

### CapMan landing page example.

les	sidential	CMS[TE	ST PROGRAM A	ople Pro	gram	Updated	] ∠	Update Capacity		
DF	nded Beds by IS/SUPR rupied Beds: <b>6</b>	Med	licaid Beds	· Funded ied Beds: 4	8					
ast	Updated on	03-04-202	20 at 12:15:21 PM by Ch	nelsea McCo	arron					
		PLE ON WAITI	or to move a person up a		,			PEOPLE REMO	OVED (in last 3	Add a Person 30 Days)
						Sea	rch:		Exp	ort to Excel
#	Full Name	Date of Birth	Priority Population	Bed Option	\$ Status	Date Added	# of days	Date Updated	Actions	÷
1	TESTTWO TESTTWO	07/03/1990	2-Pregnant women with a substance use disorder	Other	Waiting for RIN	07/02/2019	245	08/12/2019 10:54	Assign RIN	Remove
2	TEST11 TEST11	10/10/1990	3-Individuals with injecting	Funded by	Waiting	07/12/2019	236	08/12/2019 10:54	Assign RIN	Remove

Help is here



### Outlined in yellow below.



# **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.

Update Capacity				×
Total # of Beds:	24	Available Beds	: 24	
Beds by Funding Source	ce	Occup	ied Beds	

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*.

Beds by Funding Source		Occupied Beds
Funded by IDHS/SUPR	•	3
Medicaid	•	14
Not funded	•	1
Other	•	2
Blue Cross		





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)

Residential CMS[LSSI - MEN'S RESIDENCE NORTH]	🗾 Update Capacity
A Please update the capacity Information	

- 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.

Funded Beds by <sup>8</sup>	Funded Beds by <sup>8</sup>	Non - Funded <sup>8</sup>
IDHS/SUPR	Medicaid	Beds
Occupied Beds: 6	Occupied Beds: 6	Occupied Beds: 4

#### **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*.





OMT CMS[STEPPING STONES, INC. TEST OMT]

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

igar A Please update the capacity Information

### **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).

Add a Person

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

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

RIN :

- 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.





Search a Person			x
[*] All four fields are required.			
RIN # :*			
000000000			
			Search Cancel
First Name	Last Name	Date of Birth	Action
No person found. Add a new perso	'n		
Person not found? Add a new person	I .		

- 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.

Search a Person			×
Please check here if the client doesn'	t have a RIN		
RIN :*			
555555555			
			Search Cancel
First Name	Last Name	Date of Birth	Action
JERRY	CHERRY	05/05/1995	Select

#### 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.





A You have unsa	ved changes or	i your waitlist. Please save now					Save	Changes Add a Pers
PEO	PLE ON WA	TLIST PEO	OPLE ADMIT	TED (in la	st 30 Days)		PEOPLE REMOV	ED (in last 30 Days)
# uli Name	Date of Birth	Priority Population	Bed Option	\$tatus	Date Added	# of days	Date Updated	Actions
3 ARUN SUNKARA	10/10/1990	5-None	Funded by IDHS/SUPR	Waiting	05/21/2019	36	06/26/2019 12:40	Admit Remove
2 TEST1 TEST1	10/10/1990	5-None	Not funded	Waiting	05/15/2019	42	05/31/2019 08:27	Admit Remove
1 SRAV K	28/07/1993	1-Pregnant women with injecting drug use	Medicaid	Waiting	05/15/2019	42	05/31/2019 08:27	Admit Remove

#### 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.

Actions	
Admit	Remove

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

ilhelplineonlinetst2.custhelp.com says		
Are you sure you want to admit SRAVANI KILA	MBI?	
	ОК	Cancel

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.

				🗸 🗸	dmission S	uccessfu	l i		
PEOPLE ADMITTED	(ir	ı last 30 Days)							
Full Name	•	Date of Birth	Priority Populati	on 🔶	Bed Option	Status	Date Admitted	Actions	\$
SRAVANI KILAMBI		07/28/1993	5-Nor	ie	Medicaid	Admitted	03/22/2019 11:19	Move to Waitlist	

 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.

Actions	
Admit	Remove

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 <u>ONLY</u> your waitlist.
- Option 2 Removing a client from your waitlist <u>AND</u> notifying other providers.

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

Choose the type of removal \*

Remove from my waitlist ONLY

Remove from my waitlist AND notify other programs

Reason for Removal? (for internal use only)\*

	Select One
	Select One
Г	Admitted at another provider
	Removed at another provider
	Client choice
	Deceased
н	Moved
н.	No longer eligible
1	Unable to reach/contact
	Other reason

#### *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 <u>without a RIN</u>, 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.

PEO	PEOPLE ON WAITLIST		PEOPLE ADI	AITTED (i	in last 30 Days)	PEOPLE REMOVED (in last 30 Days)		
Full Name	▲ Date of Birth	Priority	y Population	Bed Option	Ştatus	Date Removed	Actions	
TEST TEST	01/01/1990		regnant women with a ostance use disorder	Medicaid	Removed	06/25/2019 01:05	Add to Waitlist	
					×Removal Reasons			
			Contact Name Remo	val Reason	Removal Date			
			MARY Remo POPPINS provid	wed at and der	other 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.

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

• 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.

	*Remove a Person
Choose the type of removal *	
Remove from my waitlist ONLY	
Reason for Removal? (for internal use only) *	
Removed at another provider	T
CANCEL	

### **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 <u>here</u>.

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

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





# Assign RIN

RIN :		
		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.

		Sear	rch:		Export to Excel
l Option	\$ Status	Date Added	# of days <sup>♠</sup>	Date Updated	Actions
	Waiting	07/02/2019	245	08/12/2019 10:54	Assign RIN Remove
			Option Status Date Added   Other Waiting 07/02/2019	OptionStatusDate AddeddaysDtherWaiting07/02/2019245	Option     Status     Date Added     # of days     Date Updated       Other     Waiting     07/02/2019     245     08/12/2019 10:54

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 <u>www.helplineil.org</u>.

Description	Solution
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.
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.
The bed count is not adding up correctly when entering the Capacity.	<b>Total # of Beds</b> refers to the total number of beds for the indicated funding source. Once the number of beds <i>per funding source</i> is entered, the system will combine each amount indicated for the total bed count for that program.
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" GETHER HERSONED STORE GLESTS MANAGE USERS MAKE A RECUEST   GELEVANCCAMENT (COCONT) al CMS[TEST PROGRAM Apple Program Updated] Z (Moder Concenty) The full record, or to move a person up or down the list, click on their record the full record, or to move a person up or down the list, click on their record Complete the steps to update capacity, using "O" for Total # of Beds and "O" 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
	You have logged into the Provider Portal through the Helpline website and do not see your program or agency listed. Example of an error message: The bed count is not adding up correctly when entering the Capacity. Entered an incorrect funding source or the funding source has changed. How

Help is here





		Funded Beds by   Funded Beds by   Funded Beds by     Total # of Beds 0   Total # of Beds 10   Coupled Beds 0     Available Beds 0   Total # of Beds 10   Coupled Beds 0     Available Beds 0   Total # of Beds 10   Coupled Beds 0     Available Beds 0   Total # of Beds 10   Coupled Beds 0     Available Beds 0   Available Beds 0   Coupled Beds 0     Available Beds 0   Available Beds 0   Available Beds 0     Available Beds 0   Available Beds 0   Available Beds 0     Available Beds 0   Available Beds 0   Available Beds 0     Available Beds 0   Available Beds 0   Available Beds 0     Available Beds 0   Available Beds 0   Available Beds 0     Available Beds 0   Funded Beds 0   Available Beds 0     System will confirm your action, select "OK".   Total # of Beds 10     Funded Beds 0   Funded Beds by   Funded Beds by     Funded Beds 10   Funded Beds by   Funded Beds by     Funded Beds 10   Funded Beds by   Funded Beds by     Cocupied Beds 10   Funded Beds by   Funded Beds by     Funded Beds 10   Funded Beds by   Funded Beds Bo
"Not created" and "N/A"	You have logged into the Provider Portal and see the following: TEST PROGRAM Apple Program - LEST PROGRAM T2S Grant PROY L 75024	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: Login If you already have an account, please enter your email address and password to log in. The username or password you entered is incorrect or your account has been cliabled.	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 <u>https://helplineil.org/app/utils/login_form</u>
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.



Help is here