

IBHRS Discharge Workflow for CDR Episodes

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About

The following **prerequisites** must be met in order to utilize this workflow:

- A client must have been added to your system prior to 7/1/2021
- The CDR Admission must have been exported and reported to ISMART (CDR)

Important notes:

- **CDR** was the State of Iowa's reporting method prior to IBHRS.
- A **CDR Admission** is treated as a **Care Status** within IBHRS.
- A **CDR Clinical Episode** is treated as a **Treatment Episode** without any IBHRS data gathering.

Workflow

Continuing Services

Clients meeting the prerequisites above returning for treatment can have Services provided without the need for either a Treatment Episode Form or Care Status Form being completed. If you complete these, the system will try to perform updates or possible duplication.

New Services will be linked to the CDR Admission for the Care Status Link and Services can only be reported on the given admission. If Level of Care changes or any other reason a Care Status must be completed, the entire Episode must be discharged.

1. Navigate to the client's Face Sheet: **Main Menu > Admissions Menu > Face Sheet**.
2. Edit the **IBHRS fields**: County, Gender at Birth, Gender Identity, Sexual Orientation, Ethnicity, Primary Race, Secondary Race.



Note: Only enter billable Services for the existing **CDR Admission**.

Discharging Episode

1. Navigate to the client's IBHRS Forms: **Main Menu > Clinical Forms > Unscheduled Forms**.
2. Complete a **Performance Outcome Measure Form**.
3. Complete a **Care Status Form**, linking the Treatment Episode link to the CDR Admission and Performance Outcome Measure. Linking the Treatment Episode link to the CDR Admission Form signifies a discharge for a CDR case.
4. Complete an **IBHRS Discharge Treatment Episode Form**, linking the Treatment Episode link to the CDR Admission.
5. Complete a NextStep Discharge Form ending treatment within the episode.

Level of Care Change

1. Complete the steps listed in **Continuing Services** section above.
2. Complete the steps listed in **Discharging Episode** section above.
3. Readmit the client for treatment on the Face Sheet, triggering a new **IBHRS Treatment Episode Assessment Form**.
4. Begin the IBHRS Workflow. No new CDR Forms or fields should be started or completed at this point.

Notes:



- If any Form mentioned above is not configured to link to the CDR Admission Form, that can be accomplished within Form Builder using the Form Link field.
- If a Clinical Episode has both CDR-reported documents and new IBHRS documents (Treatment Episode/differing Care Statuses from discharge), the episode will need to be fixed before exporting. Complete the Discharging Episode workflow above and Level of Care change above. Forms and Notes can be moved to the new episode. If reported prior to fixing may result in manual exporting data support requests.