

NYSCRI Operational System v3.0 OMH Clinic Release Notes	
Template Name	Type of Change
December 8, 2016	
Treatment / Recovery Plan Review/Revision 3.1.1	<ul style="list-style-type: none"> <li>Fixed text field to allow text to flow properly: Comments (including discharge criteria, collaterals participating...)</li> <li>Corrected fonts in some values which had been bold.</li> <li>Reordered signature prompts from: Name/Title/Credentials to: Name / Credentials / Title</li> </ul>
Comprehensive Assessment v3.0.4	<ul style="list-style-type: none"> <li>Fixed text field to allow text to flow properly: p. 3 – For Children: Note any Child Protective Services involvement...</li> <li>Reordered signature prompts from: Name/Title/Credentials to: Name / Credentials / Title</li> </ul>
October 26, 2016	
Evaluation and Management Note (E & M), v3.0.2	<ul style="list-style-type: none"> <li>Removed heading reference for Established patient</li> <li>Fixed missing CPT coding for New Patients by adding: 99202-99205.</li> <li>Added clarifying language in coding section.</li> </ul>
June 8, 2016	
Comprehensive Assessment, (CA), v3.03, 06-2016	<ul style="list-style-type: none"> <li>Clinical Formulation section: Amended language to align with language found in Pre-Admission / Admission Decision Note, Disposition section. Upon Decision to Admit, <i>include services to meet the Prioritized Assessed Needs</i>).</li> <li>Suicide and Self-Harm Screen / Assessment: Removed Hyperlink in Safety Management Plan section for Patient Safety Plan Template. This template has updated language and is now available in fillable PDF on the NYSCRI OMH v3.0 Dashboard.</li> </ul>
Patient Safety Plan Template	<ul style="list-style-type: none"> <li>Added this fillable PDF version with additional prompts from the previously linked version in CA, per input from Dr. Stanley.</li> </ul>
Pre-Admission	<ul style="list-style-type: none"> <li>Changed name to Pre-Admission / Admission Decision: better reflects the purpose of this note.</li> <li>Disposition section:</li> </ul>

Pre-Admission (Continued)	- Reordered and restructured section to provide better direction, including allowing for continuing the assessment after admission (by removing <i>OR</i> ).
Psychotherapy / Contact Note	<ul style="list-style-type: none"> <li>• Psychotherapy Service section: Streamlined Family service options by removing first reference to Family (select one).</li> <li>• Modifiers section: added Psychiatrist / MD / NPP option which was inadvertently not included.</li> </ul>
Substance Use / Addictive Behaviors Assessment	<ul style="list-style-type: none"> <li>• Fillable PDF version with additional prompts to synchronize with the CA.</li> </ul>
Treatment Review  Treatment Review Continued	<ul style="list-style-type: none"> <li>• Under Goal(s) / Objective(s) Review section: Added <i>Revised Treatment Plan</i> to better direct providers that once existing goals/objectives are assessed, this section now becomes the updated treatment plan going forward.</li> <li>• Added language under the Revised Treatment Plan section to make any adjustments to Discharge Criteria, collateral involvement and allowing for notation of the individual's participation in this revised treatment plan.</li> </ul>
v3.0.2 April 11, 2016	
Comprehensive Assessment	<ul style="list-style-type: none"> <li>• Fixed 1 missing and 1 broken hyperlink ("assessment") in Substance Use Screen sections.</li> </ul>
v3.0.1 April 1, 2016	
All Forms	<ul style="list-style-type: none"> <li>• Added Form Field to the Signature areas of each of the forms – if the provider / EMR has this functionality, it may enable electronic signatures rather than having to print out the form and have it signed</li> <li>• Updated Template headings: v3.0.1 and release date, 03-2016</li> </ul>
Comprehensive Assessment	<ul style="list-style-type: none"> <li>• Fixed Audit – C Pre-screen to enable scores to properly tabulate</li> </ul>
New Fillable PDF Templates Replacing Word documents of same title	<ul style="list-style-type: none"> <li>• Self-Assessment</li> <li>• Relapse Prevention</li> </ul>
Initial Release – v3.0.0 March 3, 2016	
General Changes (listed here rather than by form type)	<ul style="list-style-type: none"> <li>• Removed non-Clinic language / reporting / data elements</li> <li>• Language/wording changes throughout</li> <li>• Removed Billing Strips</li> </ul>

General Changes (Continued)	<ul style="list-style-type: none"> <li>• Updated headers and signature sections</li> <li>• Added radio buttons and checkboxes to indicate one choice versus multiple choice options</li> </ul>
Comprehensive Assessment (CA)	<p>Broad changes:</p> <ul style="list-style-type: none"> <li>• 2015 OMH Patient Characteristic Survey data points included in part when clinically or logistically helpful</li> </ul> <p>Added Sections</p> <ul style="list-style-type: none"> <li>• Identifying Information, Preferred Language, Health Insurance Coverage, Preferences and Barriers to Achieving Preferences, Assisted Outpatient Treatment/ Voluntary Agreements, Financial Situation; Expanded Legal / Forensic Involvement; Self/Cultural Identification; Personal Representation; Advance Directives</li> </ul> <p>Significantly Revised Sections</p> <ul style="list-style-type: none"> <li>• Family/Significant Others</li> <li>• Traumatic Experiences</li> <li>• Co-occurring Substance Use Disorder / Addictive Behavior</li> <li>• Diagnosis</li> <li>• Decline/Defer/Refer section removed</li> <li>• OMH Disposition removed (covered via Pre-Admission Note)</li> <li>• Billing Strip: Removed</li> </ul>
OMH Health Screen and Assessment	<ul style="list-style-type: none"> <li>• Revised heading and set of Health Conditions for self-report</li> <li>• Aligned categories, as possible, with ICD-10 major categories</li> <li>• Promoting clinical rather than reporting focus</li> <li>• Added additional question to address personal/cultural preferences</li> </ul>
Evaluation & Management Note	<ul style="list-style-type: none"> <li>• New form aligned with CMS Guidance for Psychiatric Examination</li> </ul>

Medication List	<ul style="list-style-type: none"> <li>• Changed order of elements for better flow; added drop down for status</li> <li>• Added capability to continuously add additional medications rather than having to start another form</li> </ul>
Treatment Plan	<ul style="list-style-type: none"> <li>• Restructured plan date section</li> <li>• Strengths/Skills and Barriers combined for each goal, now one section for entire plan listing Needs and Strengths</li> <li>• Streamlined Goal / Objective(s) section</li> <li>• Expanded ability to use pdf form to add additional goal/objective(s)</li> <li>• Removed Modality and aligned language in table with OMH regulations /standards</li> <li>• Removed PROS and ACT only elements</li> <li>• Revised Transition/Discharge Criteria</li> <li>• Removed Diagnosis from latter part and included it at beginning of form</li> <li>• Revised input/participation sections as well as signature section</li> </ul>
Treatment Plan Review / Revision	<ul style="list-style-type: none"> <li>• Restructured Note; Review form will become the Revised Treatment Plan</li> <li>• Streamlined Review section</li> <li>• Expanded ability to use pdf form to add additional goal/objective(s) for review and addition</li> <li>• Aligned language with Treatment Plan</li> <li>• Removed section for Discharge Criteria</li> <li>• Revised signature section</li> </ul>
Relapse Prevention Plan	<ul style="list-style-type: none"> <li>• Removed “safety” from title as term now reserved by OMH for Suicide Prevention</li> <li>• Removed section on Health Care Proxy and Advance Directives – similar information is now contained in the Comprehensive Assessment</li> </ul>
Discharge Summary/Plan - Part A	<p>Removed</p> <ul style="list-style-type: none"> <li>• Legal Status section</li> <li>• Reason for Discharge drop downs and replaced with narrative using OMH language</li> <li>• Additional comments, outcomes, strengths and abilities lines, Living arrangements, OASAS only item</li> </ul>

Discharge Summary/Plan - Part A (Continued)	<ul style="list-style-type: none"> <li>• Medications section, Financial /Benefit Status element, Individual's Response</li> </ul> Revised <ul style="list-style-type: none"> <li>• Diagnosis section, Referrals,</li> </ul>
OMH Part 599 Clinic Pre-Admission Note	Removed <ul style="list-style-type: none"> <li>• OASAS Session Summary</li> </ul> Revised <ul style="list-style-type: none"> <li>• Session Summary revised and particular OMH language included</li> </ul> Added <ul style="list-style-type: none"> <li>• Number of Pre-Admission Service, if applicable</li> <li>• Types of service with CPT codes</li> <li>• Modifiers</li> </ul>
Complex Care / Crisis Intervention / Contact Note and/or Psychotherapy / Contact Note	New
Psychotherapy / Contact Note  Psychotherapy Continued	Removed <ul style="list-style-type: none"> <li>• Mental Status</li> <li>• New Issues section</li> </ul> Added <ul style="list-style-type: none"> <li>• Date of Service</li> <li>• Duration</li> <li>• Location</li> <li>• Type of Service</li> <li>• Language around intervention, response, Plan</li> <li>• Need for Complex Care Management</li> <li>• Modifiers</li> </ul>
Health Monitoring/Injectable Psychotropic Medication Administration / with Monitoring and Education	New form
Military Assessment	Revised Re-ordered Yes No, to No Yes (making consistent with rest of form set) Direction throughout: (Describe in comments section each element) <ul style="list-style-type: none"> <li>• Change from: Have you ever been in a war-zone, fought in a war, or lived in a place where war was happening? Yes No - If no, please skip to the next section, If Yes, Did you:</li> </ul>

<p>Military Assessment (Continued)</p>	<ul style="list-style-type: none"> <li>• To: Have you ever been in a war-zone, fought in a war, or lived in a place where war was happening?</li> </ul> <p>No Yes</p> <ul style="list-style-type: none"> <li>• Have you: (Check wording of each phrase to assure fidelity as some minor changes were made)</li> <li>• VFW acronym spelled out</li> </ul>
<p>Military Assessment - Significant other</p>	<p>Revised</p> <ul style="list-style-type: none"> <li>• VFW acronym spelled out</li> <li>• From: Does the service member or family members have difficulty with mood changes, depression, irritability or anger management? To: Does the service member or do family members...</li> <li>• From: Is the service member or significant other experiencing flashbacks or reliving of traumatic events? To: Is anyone experiencing flashbacks or reliving of traumatic events?</li> <li>• Does the service member or others sleep with weapons? From: Do the school social worker and teacher know the child is from a military family? To: Do key school staff, including the teacher, know the child is from a military family?</li> </ul>