



Core Competencies Checklist

User Name: _____

Date: _____

All Users:

User Skill	Required Steps / Answer Key
<input type="checkbox"/> Log in to PSYCKES	Open PSYCKES web page; navigate to login page; enter unique User Identification (ID), password and token code
<input type="checkbox"/> Exit PSYCKES	Click "Log Off;" do not simply close browser

Clinicians:

User Skill	Required Steps / Answer Key
<input type="checkbox"/> Search for a client in Recipient Search	Click "Recipient Search" tab; enter Medicaid ID#, Social Security Number (SSN) or Client name; if searching by name, may need to add criteria to narrow the list; if desired, change setting of "Consent Status;" run the search; view/sort the results.
<input type="checkbox"/> Access a Clinical Summary from search results	Click on client's name.
<input type="checkbox"/> Set Clinical Summary time period, and read message re data with special protections <ul style="list-style-type: none"> ▪ Explain: What data has special protections? Is it hidden or shown in the summary you are viewing? 	Click on desired time period; read message about data with special protections; correctly identify what data has special protections and whether it is shown in the Clinical Summary.
<input type="checkbox"/> Use Integrated Graph to review services over time, and view desired details <ul style="list-style-type: none"> ▪ Does the client appear to be engaged in outpatient MH treatment? 	Zoom in on specific time period; hover cursor over dot on graph to see details.
<input type="checkbox"/> Find desired information in the Clinical Summary <ul style="list-style-type: none"> ▪ What quality flags (if any) does client have? ▪ Where and when was the client's most recent mental health outpatient visit? ▪ What (if any) are the client's current active medications (psychotropic and/or medical)? ▪ What can you learn about labs and diagnostic testing? 	<ul style="list-style-type: none"> ▪ Be familiar with the sections of the Clinical summary ▪ Be aware of which sections are broken out into Behavioral Health vs. Medical, and which are integrated ▪ Understand what the quality flags mean ▪ Be aware of what information is and is not available (e.g., labs and diagnostic tests are shown, but not results).
<input type="checkbox"/> "Drill down" to find details of items in the summary (medications and services) <ul style="list-style-type: none"> ▪ Does the client appear to be adhering to medication regimen? 	Click "see detail" icon for at least one medication and one service; for medication detail, switch between trials and orders.
<input type="checkbox"/> Print the Clinical Summary (and print details, if desired)	Click the "export to PDF" icon; select "all" or specific sections, and click "export;" click "open" (select "save" only if necessary and only to a secure server); print document.

PHI Access Module Users (“Registrar Access”):

User Skill	Required Steps / Answer Key
<input type="checkbox"/> Access Registrar menu	Click “Registrar Menu” tab.
<input type="checkbox"/> Enter in the PHI Access Module that your institution has the right to access a client’s data due to a signed consent, a clinical emergency, or attestation providing services to the client	Click “PHI Access” tab; click “Enable access to client’s clinical summary;” enter Medicaid ID# or SSN and search for client, verify that the right client was returned; select the reason for access to client data (signed consent, emergency, or attestation of service), and select how client’s identity was verified (known to staff or specify 2 forms of ID); and submit/quit or submit/ proceed to clinical summary.
<input type="checkbox"/> Print a consent form	Click “Consent Forms” tab; click desired form; click “open” (or “save” – it is okay to save blank consent); print document. To enter information to populate in consent form, prior to clicking “Consent Forms” tab, click “Administration” tab and enter relevant information.