



bhworks User Guide

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Navigating the Workspace

Participants

Find Participant Recently Completed

Find Participants assigned to your programs or worklist

Show: My Worklist 25 Per Page Episode of Care: Active Name, UIC, Email, or Phone ### Search + New Participant

<input type="checkbox"/>	NAME	UIC	DATE OF BIRTH	GENDER	ZIPCODE	LOCATION	EPISODE OF CARE
<input type="checkbox"/>				Female	48197	Lincoln Senior High School	Active (Started 3/18/2024)
<input type="checkbox"/>				Male	48198	Lincoln Senior High School	Active (Started 4/19/2024)

Help

Participants: The Participants tab is where staff will create, manage, and monitor the participants with which they are working.

Groups: The Groups tab is where staff can create, manage, and monitor groups when meeting with multiple students at once.

Referrals: The Referrals tab is where staff can view referrals that their organization has made or referrals that have been made to their organization. Users can view these referrals and monitor them for follow-up as needed. *Not currently being used by the district.*

My Services: The My Services tab can be used for documentation of indirect services such as consultations, attending meetings, or providing a training.

Resources: The Resources tab allows staff users to access and view materials that will help with setup, training, and implementation of bhworks into their organization. This tab is accessed from the sidebar menu of the bhworks screen and provides templates, guides, and training slides.

Reports: The Reports tab allows specified staff to view aggregate data that has been collected for their organization. Those with permission are able to view summary statistics with visuals (heat maps, bar graphs, charts, lists) representing data across an organization, program, or study.



Creating a Participant

Providers may have to manually enter information for a student if their name does not appear when entered in the search bar.

1. On the **Participants** tab, click on the **New Participant** button.

Participants

Find Participant Recently Completed

Find Participants assigned to your programs or worklist

Show: My Worklist 25 Per Page Episode of Care: Active

Name, UIC, Email, or Phone ### Search ? + New Participant

<input type="checkbox"/>	NAME	UIC	DATE OF BIRTH	GENDER	ZIPCODE	LOCATION	EPISODE OF CARE
<input type="checkbox"/>				Female	48197	Lincoln Senior High School	Active (Started 3/18/2024)
<input type="checkbox"/>				Male	48198	Lincoln Senior High School	Active (Started 4/19/2024)

2. Enter the student's full first and/or last name. Click **Search**.

3. If the student is in bhworks, their name will appear and you can click it to access their profile. If the student is not yet in bhworks, you will click **manually enter a new participant**.

The screenshot shows the 'Enter Referral' form. At the top, there is a title 'Enter Referral'. Below it, there is a section for 'Participant's Organization' with a dropdown menu showing 'Milan Area Schools'. Underneath is a 'Name' field with the placeholder text 'name'. To the right of the name field are two buttons: 'Search' and 'Back'. Below the form, a message states 'No matches found. Try searching again or manually enter a new participant.' A red arrow points to the 'manually enter a new participant' link, which is highlighted with a yellow box.

4. Select the **school** where the referral is from, which will also be the program. **Referral To** will always be **Milan School Based Mental Health**. Complete the rest of the Enter Referral page with relevant information. All required fields are indicated with an asterisk.

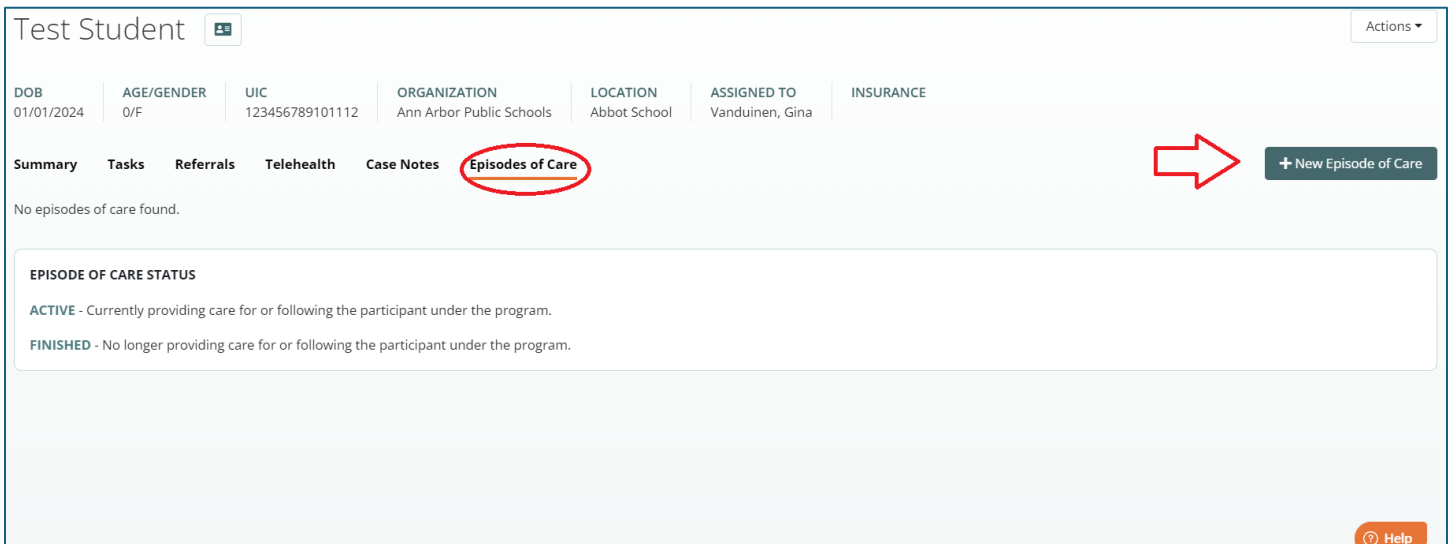
The screenshot shows the 'Enter Referral' form with the following fields filled out: '* Referral From' is set to 'Milan Area Schools > Milan Middle School'; '* Program' is set to 'Milan Middle School (MI-81100-05691)'; '* Referral To' is set to 'Milan School Based Mental Health'; and 'Referral Date' is set to '10/29/2024'. There is a search icon next to the 'Referral To' dropdown.

8. Click **Continue and Create Participant** to create the participant or Back if you do not want to save the information

Students assigned to you will appear on your Participants dashboard.

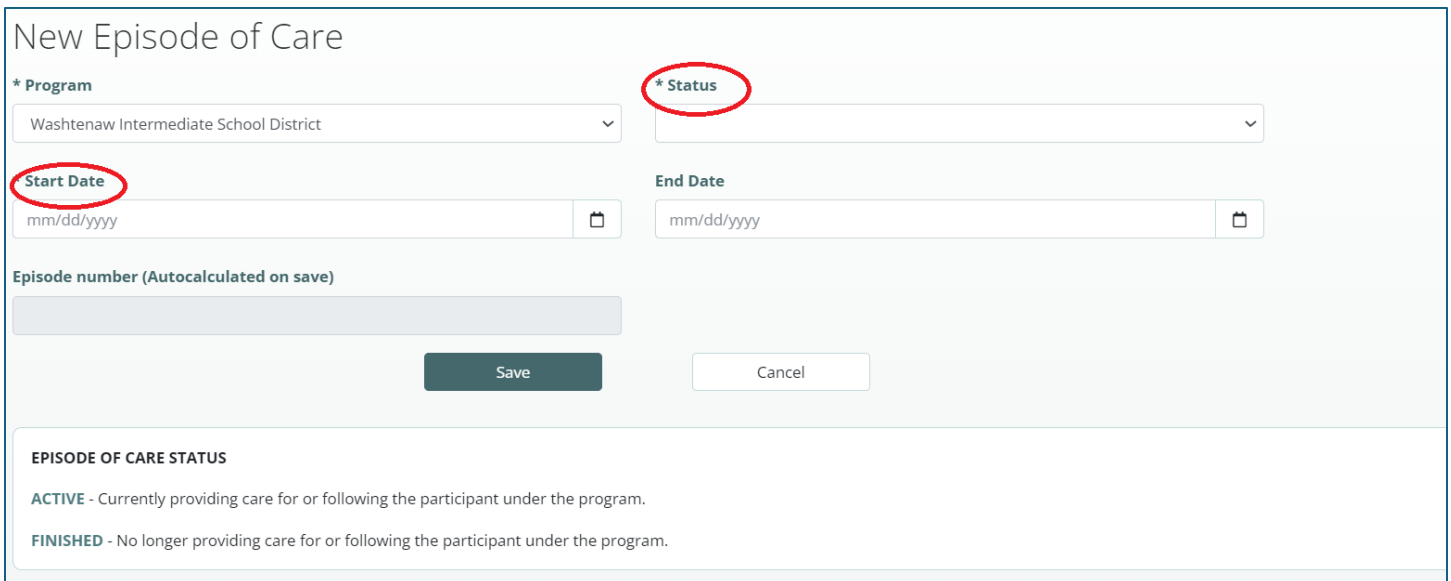
Episode of Care

1. When you receive a new referral, you will **start an episode of care**. In the student's profile, select the Episode of Care tab. Then click **New Episode of Care**. *This is used to track which participants are active on a program.*



The screenshot shows a student profile for 'Test Student'. At the top right is an 'Actions' dropdown. Below the name is a table with columns: DOB (01/01/2024), AGE/GENDER (0/F), UIC (123456789101112), ORGANIZATION (Ann Arbor Public Schools), LOCATION (Abbot School), ASSIGNED TO (Vanduinen, Gina), and INSURANCE. Below the table are tabs: Summary, Tasks, Referrals, Telehealth, Case Notes, and Episodes of Care (circled in red). To the right of the tabs is a red arrow pointing to a '+ New Episode of Care' button. Below the tabs, it says 'No episodes of care found.' There is a section titled 'EPISODE OF CARE STATUS' with two options: 'ACTIVE - Currently providing care for or following the participant under the program.' and 'FINISHED - No longer providing care for or following the participant under the program.' A 'Help' button is in the bottom right corner.

2. Click **Status** and select **Active**. Enter a **start date** and click **save** when completed.



The screenshot shows the 'New Episode of Care' form. It has fields for '* Program' (Washtenaw Intermediate School District), '* Status' (circled in red), 'Start Date' (mm/dd/yyyy, circled in red), and 'End Date' (mm/dd/yyyy). Below these is an 'Episode number (Autocalculated on save)' field. At the bottom are 'Save' and 'Cancel' buttons. There is also a section titled 'EPISODE OF CARE STATUS' with two options: 'ACTIVE - Currently providing care for or following the participant under the program.' and 'FINISHED - No longer providing care for or following the participant under the program.'

3. Enter an **end date** when you have finished your work with the student and they have been **removed from your caseload**.

Consent Form

Consent to bill and treat for the purpose of providing mental health services and Medicaid billing shall be obtained from the parent(s)/guardian(s) by the provider prior to delivery of mental health services.

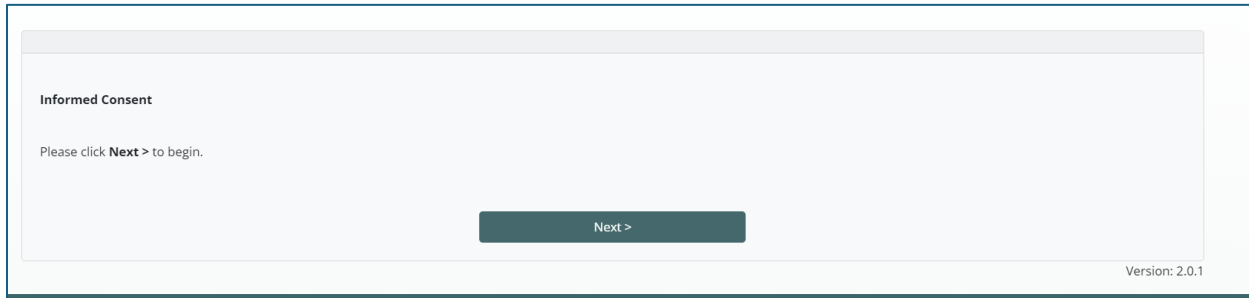
- Consent is obtained through either an **electronic signature** in bhworks or a **printed signature uploaded** into the bhworks platform.
- a. Click on the **start** button next to **Informed Consent**.

The screenshot shows a software interface with two main sections: 'Active Programs' and 'Active Groups'. Under 'Active Programs', there are three tasks listed: 'Informed Consent', 'Baseline Assessment Tasks', and 'WCSO-SECA - Short Form'. Each task has a 'Start' button to its right. A red arrow points to the 'Start' button for 'Informed Consent'. Below the tasks is a 'Past Week:' section with the text 'No activity.'. At the bottom, there is a navigation bar with buttons for 'Edit', 'Assign Program', 'Assign Staff', 'Summary', 'Tasks', 'Telehealth', and 'Case Notes'.

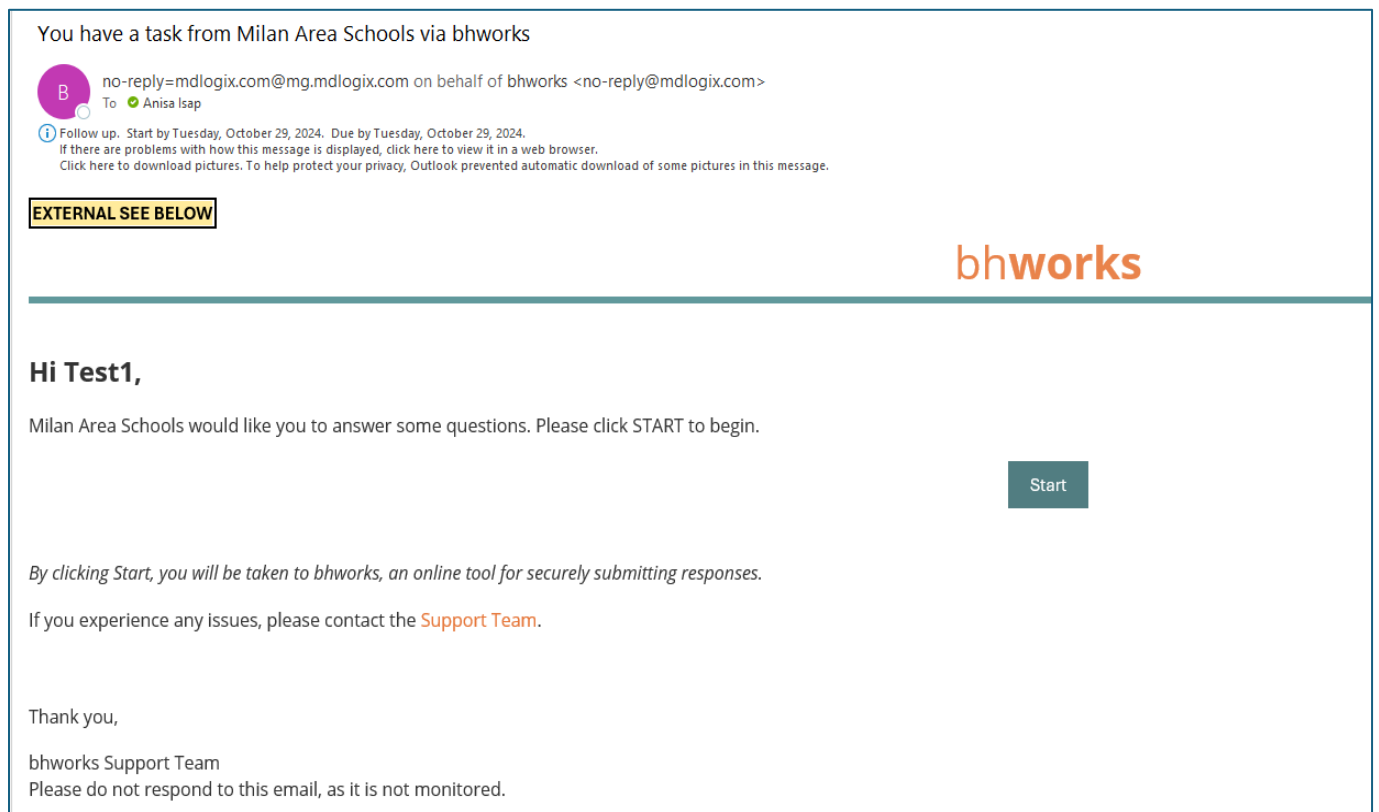
- b. A task mode window will appear. If the student is **18+** and may consent to services themselves, you will select **Participant**. If a parent or guardian will be consenting to services, you will select **parent/guardian**.

The dialog box is titled 'Who will complete the task?'. It has three radio button options: 'Participant', 'Parent/Guardian' (which is selected), and 'Provider'. Below this is the question 'How will the task be completed?' with four options: 'Hand this device to Parent/Guardian' (selected), 'Generate QR Code', 'Send Link to' (with a dropdown menu showing 'Other'), and 'Copy Link to Clipboard'. At the bottom right are 'Cancel' and 'Continue' buttons.

- c. If the person consenting is with you and wants to electronically sign on your device, select **Hand this device to Parent/Guardian** and click **Continue**. *Note: you will be signed out of Bhworks at this time.*
- d. Then click **Next** on the screen and a consent form will appear. This consent form can be electronically signed at the bottom of the page.



- e. If the person consenting is with you and would like to sign using their phone or tablet, select **Generate QR code** and click **continue**. A new screen with a QR code will appear. The person consenting can then scan the QR code on their device and the consent form will appear for them to sign. *Note: the QR code will be available for 5 minutes.*
- f. There is also an option to send a link via email to the individual signing the consent form. Select **Send link to** and then type in the appropriate email address. You may select “notify me when this task is completed” to receive an email alert when the consent form has been signed. This will send an auto-email to the parent or guardian from bhworks that looks like the below:



- g. You can also click **Copy Link to Clipboard** and craft your **own email** to the parent/guardian requesting their signature instead of the automated one from bhworks.
- h. Finally, you can upload a **manually signed form** by clicking under **Who will complete the task?** and then **Upload Document**.

Referral Details

One of the options that will initially appear in the window when you click on a student's name is **Complete Referral Details**.

1. Click the **start** button to complete this task at the **beginning of services**.

DOB	AGE/GENDER	UIC	ORGANIZATION	LOCATION	ASSIGNED TO
01/01/2024	0/F	123456789101112	Ann Arbor Public Schools	Abbot School	Vanduin, Gina

Referral Tasks

- STAFF** Referral Details
- Informed Consent

Baseline Assessment Tasks

- Behavioral Health Screen for Ages 6-14
- WCSD-SECA - Short Form

Summary Tasks Telehealth Case Notes

2. You will be taken to a new page to complete this task. Input pertinent information and click **Save and Review** at the bottom of the page.

REFERRAL DETAILS

Please provide additional details to support this referral.

STUDENT & REFERRAL INFO

Is the student an emancipated minor? Yes No Unsure

Current Student Support(s) IEP 504 Plan Other (please specify)

Grade: 9th grade

Primary Referral Reason: Aggressive Behaviors / Fighting

PARENT / GUARDIAN INFO (if applicable)

Parent/Guardian 1 Name: Mary Mom
Phone: (999) 999-9999
Relationship to Student: Biological Mother

Parent/Guardian 2 Name: David Dad
Phone: (888) 888-8888
Relationship to Student: Biological Father

PERSON MAKING REFERRAL (if entering on behalf of)

Name: Terri Teacher
Email: terri@school.edu
Phone: (777) 777-7777

Save and Return Cancel

1. Staff enters details by filling out the form
2. Clicks Save & Review button

3. You will be able to review the information you entered and make any necessary changes. When all the information looks correct, click “Finalize” to save the referral details to the student’s profile.

The screenshot displays the 'bhworks ISD / RESA Demo BETA' interface. The main content area contains a form with 17 numbered fields. Fields 7 and 8 are for general information, while fields 9-17 provide contact and relationship details for two guardians and the person making the referral. Each field has a 'Change' button to its right. At the bottom of the form, there are two buttons: 'Exit >' on the left and 'Finalize >' on the right. The 'Finalize >' button is highlighted with a red rectangular box. A callout bubble points to this button, containing the following instructions:

1. Staff reviews the referral details
2. Click Finalize button

7	When and where are the problems occurring?	Change	
8	Additional Information / Summary of Needs	Change	
9	Parent/Guardian Name 1:	Mary Mom	Change
10	Phone #	(999) 999-9999	Change
11	Relationship to Student	Biological Mother	Change
12	Parent/Guardian Name 2:	David Dad	Change
13	Phone #	(888) 888-8888	Change
14	Relationship to Student 2	Biological Father	Change
15	Person Making Referral Name (If entered on behalf of another person):	Terri Teacher	Change
16	Email:	terri@school.edu	Change
17	Phone:	(777) 777-7777	Change

Assigning Therapy Tasks

When the consent form is completed, start billable services and complete a plan of care.

1. The window that appears when you click on a student's name will have several options at the bottom

SELECTED PARTICIPANT

Student, Test

DOB	AGE/GENDER	UIC	ORGANIZATION	LOCATION	ASSIGNED TO
01/01/2024	0/F	123456789101112	Ann Arbor Public Schools	Abbot School	Vanduinen, Gina

Active Programs
Washtenaw Intermediate School District

Referral Tasks

Task	Action
Informed Consent	Start
STAFF Referral Details	Review

Baseline Assessment Tasks

Task	Action
Behavioral Health Screen for Ages 6-14	Start
WCSD-SECA - Short Form	Start

Past Week:
No activity.

Buttons: Edit, Assign Program, Assign Staff, Summary, **Tasks**, Telehealth, Case Notes

2. Clicking **Tasks** will take you to the Tasks tab of the student's profile. There is an **Actions** button in the top right corner of the page.

Test Student

DOB	AGE/GENDER	UIC	ORGANIZATION	LOCATION	ASSIGNED TO	INSURANCE
01/01/2024	0/F	123456789101112	Ann Arbor Public Schools	Abbot School	Vanduinen, Gina	

Summary **Tasks** Referrals Telehealth Case Notes Episodes of Care

BASELINE ASSESSMENT TASKS Assigned by Gina Vanduinen on 06/06/2024

Task	Scheduled	Started	Completed	Due	Status	Action	Referral Status	Activity	More Actions
Behavioral Health Screen for Ages 6-14	6/6/2024				Unstarted	Start			...
WCSD-SECA - Short Form	6/6/2024				Unstarted	Start			...

REFERRAL TASKS Assigned by Gina Vanduinen on 06/06/2024

Task	Scheduled	Started	Completed	Due	Status	Action	Referral Status	Activity	More Actions
STAFF Referral Details	6/6/2024	06/06/2024			Under Review	Review			... Help
Informed Consent	6/6/2024				Unstarted	Start			...

3. Clicking actions will bring up a drop-down menu. Under **Assign task list** select **Therapy Tasks**.

The screenshot shows the 'Test Student' profile page with the 'Tasks' tab selected. The page displays a table of tasks under 'BASELINE ASSESSMENT TASKS' and 'REFERRAL TASKS'. A dropdown menu is open, showing options: 'Edit Participant', 'Assign Program', 'Assign Staff', 'Assign Task List (select one below):', 'Baseline Assessment Tasks', 'Therapy Tasks', 'Crisis Stabilization Tasks', and 'Discharge Tasks'. A red arrow points to the 'Therapy Tasks' option.

Task	Scheduled	Started	Completed	Due	Status	Action	Referral Status	Activity	More Actions
Behavioral Health Screen for Ages 6-14	6/6/2024				Unstarted	Start			⋮
WCSD-SECA - Short Form	6/6/2024				Unstarted	Start			⋮

4. A window will appear asking for the **Start Date**. Enter the date when you first met with the student. *Note: case notes for meetings with students prior to the consent form being signed will be non-billable: other.

The screenshot shows a modal window titled 'THERAPY TASKS'. It contains a 'Start Date' label and an input field with a calendar icon. Below the input field are 'Save' and 'Cancel' buttons.

5. After entering a Start Date and clicking save, a new box will appear at the bottom of the page with a Plan of Care Task.

The screenshot shows the 'THERAPY TASKS' table after a new task has been added. The table now includes a 'Plan of Care' task.

Task	Scheduled	Started	Completed	Due	Status	Action	Referral Status	Activity	More Actions
STAFF Confirm 1st Appointment	6/5/2024	N/A			Unstarted	Complete			⋮
STAFF Plan of Care	6/5/2024			07/05/2024	Unstarted	Start			⋮

Mental Health Assessment

A mental health assessment will be completed for every student that starts services. This assessment helps to identify presenting challenges, treatment goals, and appropriate Z code.

1. When documenting an assessment, start a **new case note**.

The screenshot shows the 'Test Student' profile page. At the top, there are fields for 'DOB' (01/01/2024), 'AGE/GENDER' (0/F), 'UIC' (123456789101112), 'ORGANIZATION' (Ann Arbor Public Schools), 'LOCATION' (Abbot School), 'ASSIGNED TO' (Vanduinen, Gina), and 'INSURANCE'. Below these fields is a navigation bar with tabs for 'Summary', 'Tasks', 'Documents', 'Referrals', 'Telehealth', 'Case Notes', and 'Episodes of Care'. The 'Case Notes' tab is currently selected and underlined. To the right of the navigation bar is a '+ New Case Note' button, which is highlighted with a red arrow.

2. Select **Mental Health Assessment (H0031 HA)** from the **Services** dropdown menu

The screenshot shows the 'New Case Note' form. The form has several fields: '* Program' (Washtenaw Intermediate School District), '* Date' (empty), '* Funding Source' (Billable-Parent/Guardian Consent), '* Site' (empty), and '* Encounter Status' (empty). The '* Service' dropdown menu is open, showing a list of services. The service 'Mental Health Assessment (H0031HA)' is highlighted in blue. Other services in the list include 'Eval: Developmental Screen w/score', 'Eval: Developmental Testing 31 to 76 minutes', 'Family Psychotherapy [conjoint] w/o Student- must be in POC', 'Family Psychotherapy with Student', 'Group Psychotherapy (90853HA)', 'Neurobeh Status Exam and Rpt Not for SPED el', 'Neurobehavioral Status exam: add 60 mins', 'Non-Billable: Brief Intervention (see student more than once but less than 30 days)', 'Non-Billable: Case Management/Care Coordination', 'Non-Billable: Formal Meeting/Consultation', and 'Non-Billable: Monthly Progress Note'.

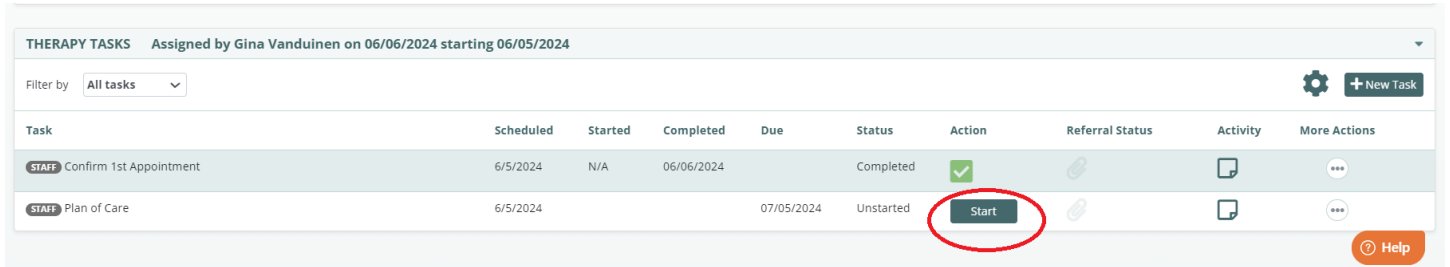
3. Enter the relevant details and/or **upload any separate assessment documents** under Supporting Materials. Select **Save and Finish** when complete.

The screenshot shows the 'Supporting Materials' section of the 'New Case Note' form. It includes a header 'Supporting Materials PDF, PNG and JPG only' and an 'Attach documents' field with a 'Browse' button. Below this is a large text area for '* Notes'. At the bottom of the form, there are three buttons: 'Save and Return', 'Save and Finish', and 'Cancel'. A status bar at the very bottom indicates 'Last saved at 11:06:53 AM'.

Plan of Care

A Plan of Care (POC) should be created within 30 calendar days from the first date that services were provided for a specific condition. The POC must include specific and achievable goals for each condition and be relevant to the individual student's well-being and lifestyle. Treatment goals should be measurable, and time bound as appropriate. The individualized POC must be developed, maintained, and updated based on status or goal changes by licensed medical providers acting within their scope of practice. All POCs must be updated at least annually.

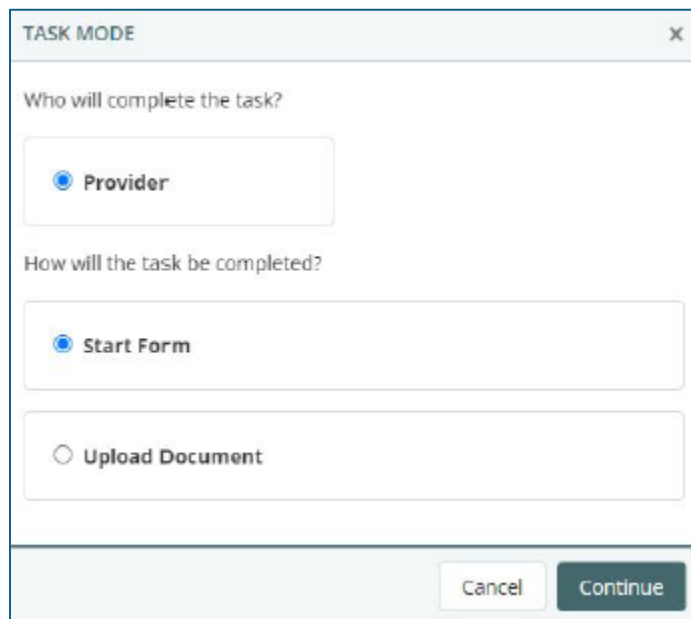
1. When ready to start the **Plan of Care**, select **Start**.



The screenshot shows a table titled 'THERAPY TASKS' with the subtitle 'Assigned by Gina Vanduinen on 06/06/2024 starting 06/05/2024'. The table has columns for Task, Scheduled, Started, Completed, Due, Status, Action, Referral Status, Activity, and More Actions. The 'Plan of Care' task is highlighted, and its 'Start' button in the 'Action' column is circled in red.

Task	Scheduled	Started	Completed	Due	Status	Action	Referral Status	Activity	More Actions
STAFF Confirm 1st Appointment	6/5/2024	N/A	06/06/2024		Completed	✓			⋮
STAFF Plan of Care	6/5/2024			07/05/2024	Unstarted	Start			⋮

2. Select **Provider** under **Who will complete the task?** Select **Start Form** or **Upload Document**.





The 'TASK MODE' dialog box contains two sections. The first section, 'Who will complete the task?', has a radio button selected for 'Provider'. The second section, 'How will the task be completed?', has radio buttons for 'Start Form' (selected) and 'Upload Document'. At the bottom are 'Cancel' and 'Continue' buttons.

3. Complete **Plan of Care** with information you have obtained from student, parent/guardian, and referral source. Areas with red asterisk next to them are required fields.

[Show Instructions](#)

PLAN OF CARE

For Social Emotional or Behavioral Health Needs
To be Completed within 30 calendar days of First Initial Contact for Ongoing Services (Medicaid Requirement)

* Student Name	Test Student
* Date of Birth	01/01/2024 
Building	Abbot School
Grade	<input type="text"/> ▼
Developed during School Year	2023-2024 ▼
Homeroom Teacher	<input type="text"/>
* This Plan is a	<input checked="" type="radio"/> New Plan of Care <input type="radio"/> Continuation of existing Plan of Care <input type="radio"/> Amendment to existing Plan of Care
* Consent Given On	<input type="text"/> 
* Consent Given By	<input type="text"/>

PARTICIPANTS

Click +Add for each participant

- You will be asked to detail how you are **coordinating with other service providers** as this is a Medicaid requirement.
- When all information has been ready and you are ready to finish the Plan of Care, you will **electronically sign** the document. You have options to Save and Return, Save and Review, or cancel. When the document is ready to be finalized, click **Save and Review**. Make sure all needed information has been entered and is accurate. If all information looks correct, then click **Finalize**.


Name of Staff Person who Completed Plan of Care

* Signature of Qualified Staff Approving Plan of Care

Clear

* Credential of Qualified Staff Approving Plan of Care

* Signature Date

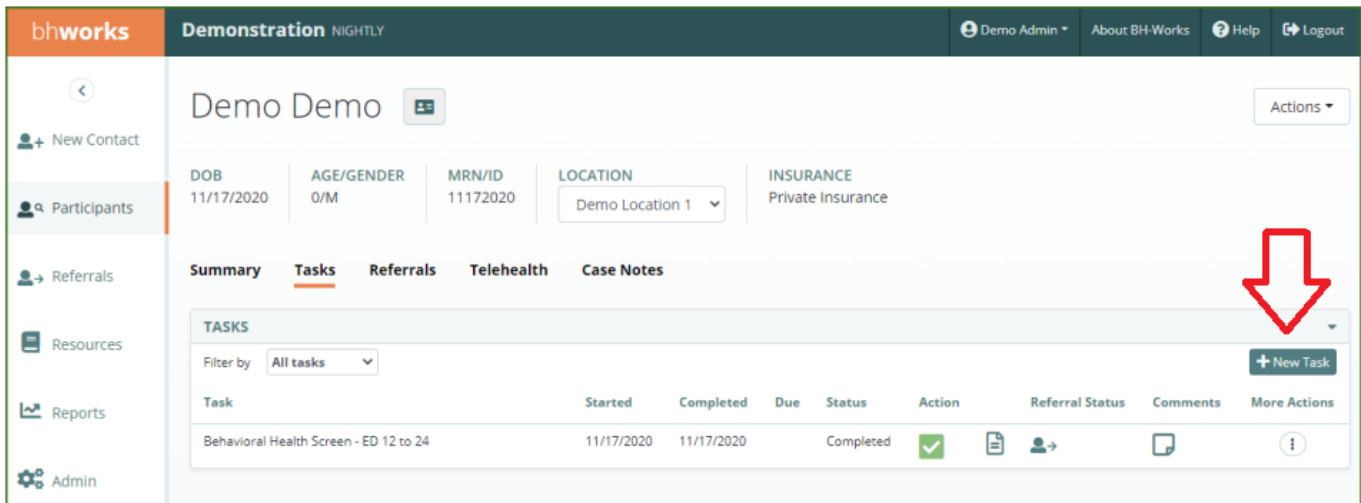


[Show Instructions](#)

Assign a New Task

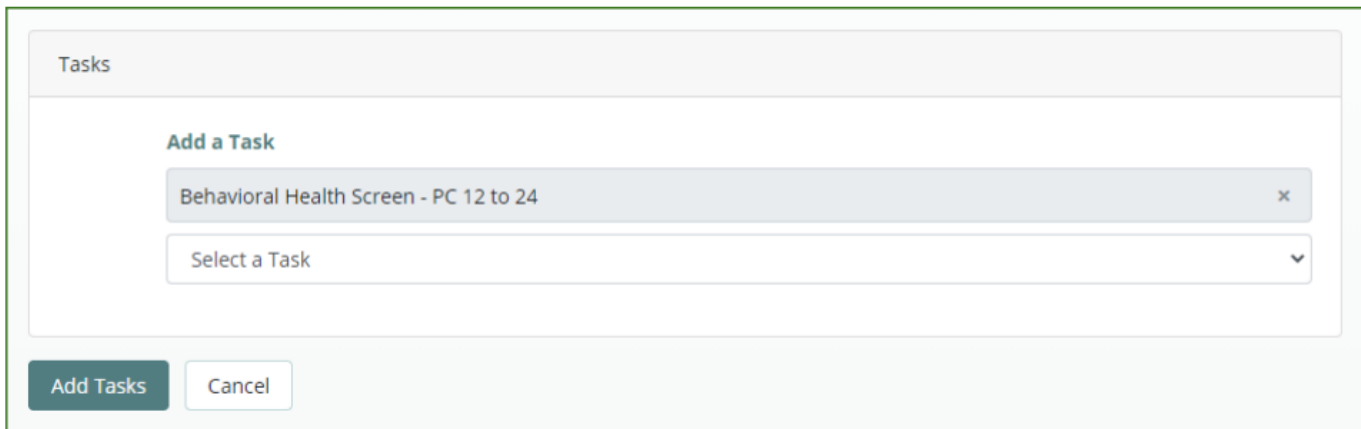
Staff can assign other **new tasks (assessments, crisis stabilization, discharge)** on the participant's task list as needed. To assign a task, staff will:

1. Click **Participants** tab in the side panel .
2. Click on desired **participant**.
3. Click on **Tasks** button next to the participant's name to view tasks (forms).
4. Click on **+ New Task** button.
5. Select the desired Task in the dropdown menu under Add a Task.
6. Click **Add Tasks** to save the assigned task or Cancel to undo the action.



The screenshot shows the 'bhworks' interface for a participant named 'Demo Demo'. The 'Participants' tab is selected in the left sidebar. The 'Tasks' tab is active in the main content area. A table lists tasks, with one task 'Behavioral Health Screen - ED 12 to 24' shown as completed. A red arrow points to the '+ New Task' button in the top right corner of the task list.

Task	Started	Completed	Due	Status	Action	Referral Status	Comments	More Actions
Behavioral Health Screen - ED 12 to 24	11/17/2020	11/17/2020		Completed	✓			



The screenshot shows the 'Add a Task' modal dialog. The task 'Behavioral Health Screen - PC 12 to 24' is selected in the dropdown menu. The 'Add Tasks' button is highlighted.

Tasks

Add a Task

Behavioral Health Screen - PC 12 to 24

Select a Task

Add Tasks Cancel

Case Notes

Case Notes are a critical component for providers and staff when interacting with a student and/or providing activities and services. This documentation support progress and treatment options and is also crucial for billing purposes.

The Case Notes tab shows the participant's case notes, including:

- Date - data collection tasks
- Service - monitoring referrals
- Provider - recent services
- Status - session status
- Duration - session length
- Notes - case notes

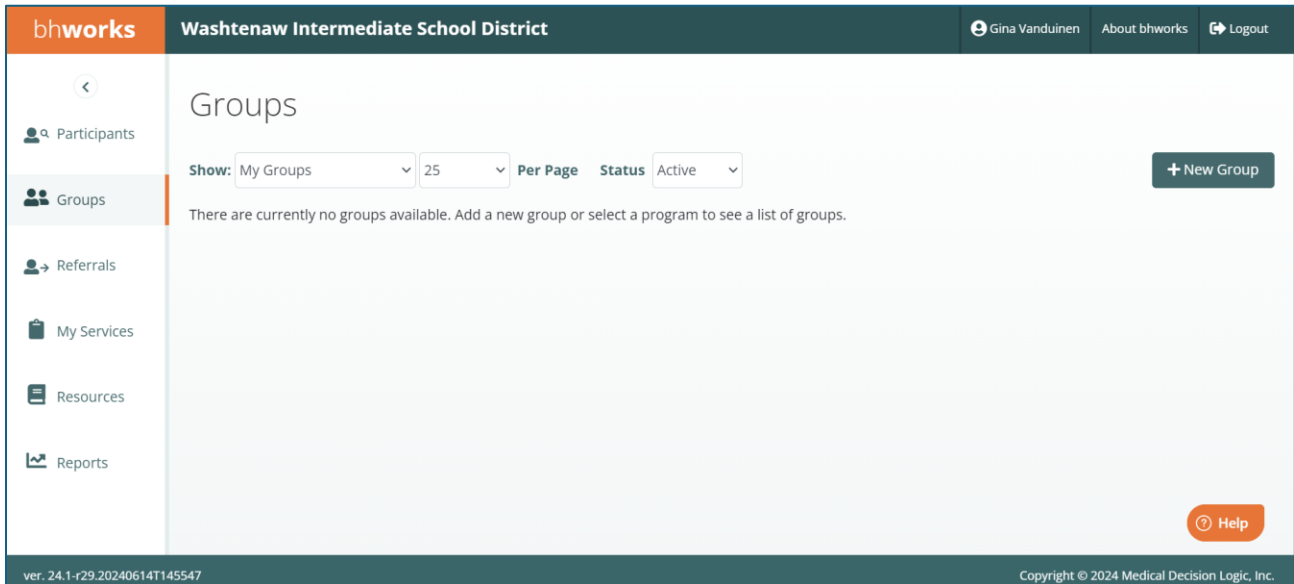
To record a case note:

1. Click **Participants** tab in the side panel.
2. Click the desired participant.
4. Select **Case Notes** at the bottom of the window.
5. Select **+New Case Note**.
6. Enter required info (marked with an *)
7. **Describe session/treatment**
 - Ensure that the Service Detail Note is sufficiently detailed to allow reconstruction of what transpired for each service billed.
 - Describe the “medical’ goal of the service.
 - Indicate the result of the therapy session (student’s response).
 - ***If the student is Medicaid eligible, you will also need to complete a monthly summary describing progress towards goals. Select Non-billable: Monthly Progress Note as the service type and choose the last school day of the month.***
8. Click Save and Return to exit the case note and complete it at a later time. To finalize a case note, the staff member will select **Save and Finish**. If after that point anything needs to be changes, you must select the three dots and click “amend” to unlock it.

Groups

If you are facilitating ongoing sessions with multiple meetings at the same time, creating a group will save you time when entering case notes. **To create a group:**

1. Select **Group** from the side panel and click **+New Group**.



2. Enter Group information, selecting **Milan School Based Health** from the drop down under **Program**.

New Group

* **Group Name**
Test

* **Status**
Active

* **Organization**
Milan School Based Mental Health

* **Program**
Milan School Based Mental Health

3. When you have entered all applicable information, select **Save** to create a new group
4. Once your group has successfully been created, it will appear on the **Group dashboard**.
5. Clicking on the **Group Name** will cause a new window to pop up, similar to when you click on an individual participant name.

6. You can add participants to the group by clicking **Group Members**.

The screenshot shows a modal window titled "SELECTED GROUP" with a close button in the top right corner. The group name "Test Group" is displayed at the top. Below the name is a table with the following data:

STATUS	LAST SESSION	SIZE	ORGANIZATION	PROGRAM	ASSIGNED TO
Active		0	Washtenaw Intermediate School District	Washtenaw Intermediate School District	Vanduinen, Gina

Below the table, there is a section titled "Group Members" with the text "Click on Group Members to add participants." At the bottom of the modal, there are three buttons: "Group Information", "Group Members", and "Sessions". A red arrow points down to the "Group Members" button.

7. Clicking on Group Members will bring you to a new page. On this page, you can **search for participants** and click on their name to **select and add them to the group**.

- A. Note: Bhworks does not let you add more than 10 students to a group. **HOWEVER, Medicaid reimbursement will only allow billing for groups between 2-8 students.**

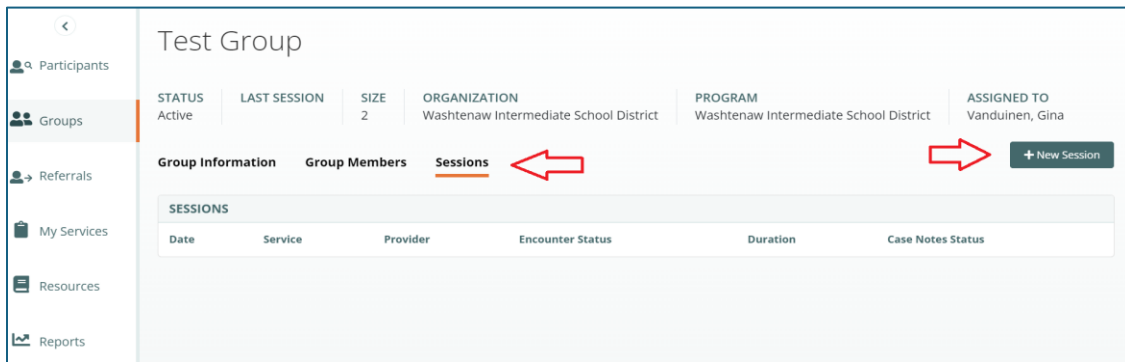
The screenshot shows the main application interface for "Test Group" within the "bhworks" system for "Washtenaw Intermediate School District". The user is logged in as "Gina Vanduinen". The interface includes a sidebar with navigation options: Participants, Groups, Referrals, My Services, Resources, and Reports. The main content area shows the group details and a search bar for participants. The "Group Members" tab is selected, and the "Add" button is highlighted with a red arrow.

Search for participants and click on their name to select and add them to the group.

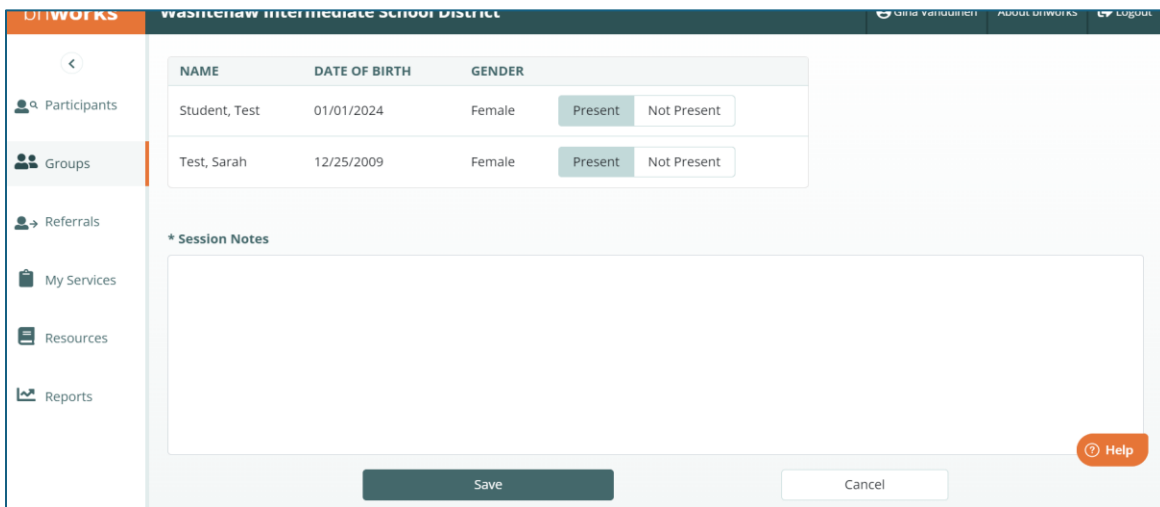
Name or UIC Add

NAME	UIC	DOB	GENDER	ZIPCODE	LOCATION
------	-----	-----	--------	---------	----------

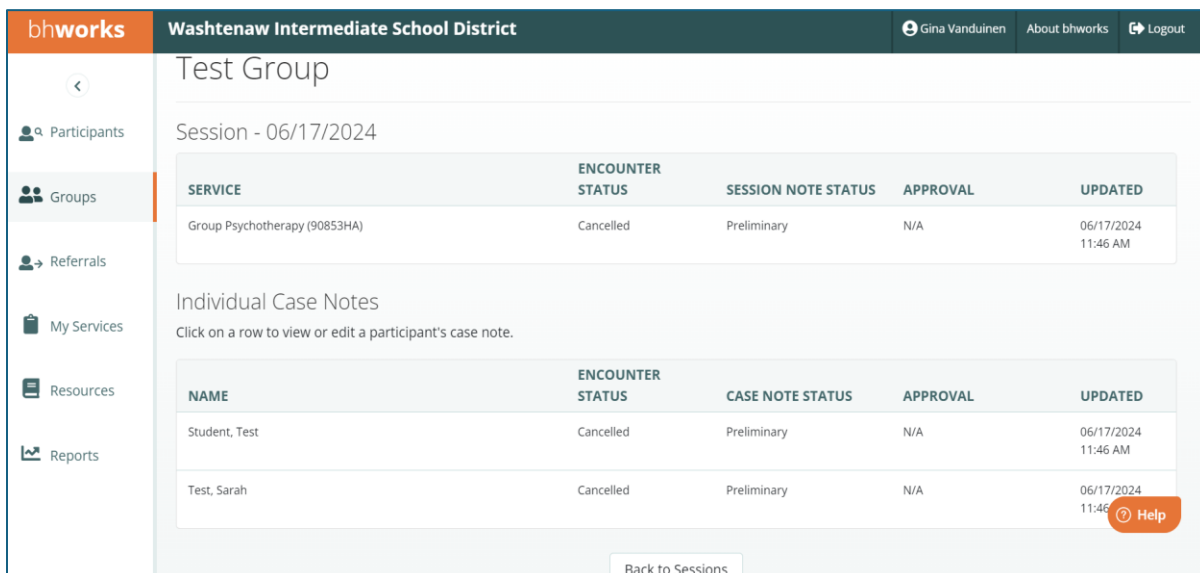
8. When you have completed a group session, document it by clicking on **Sessions** and **+ New Session**.



9. Enter relevant information and **session notes/a general note (specific notes for each student will be entered in the next screen)**. All fields marked with an asterisk are required. When complete, click **Save**.



10. After saving, you will then need to click **on each individual group member** and enter **a note specific to that student** detailing their progress and participation in group.



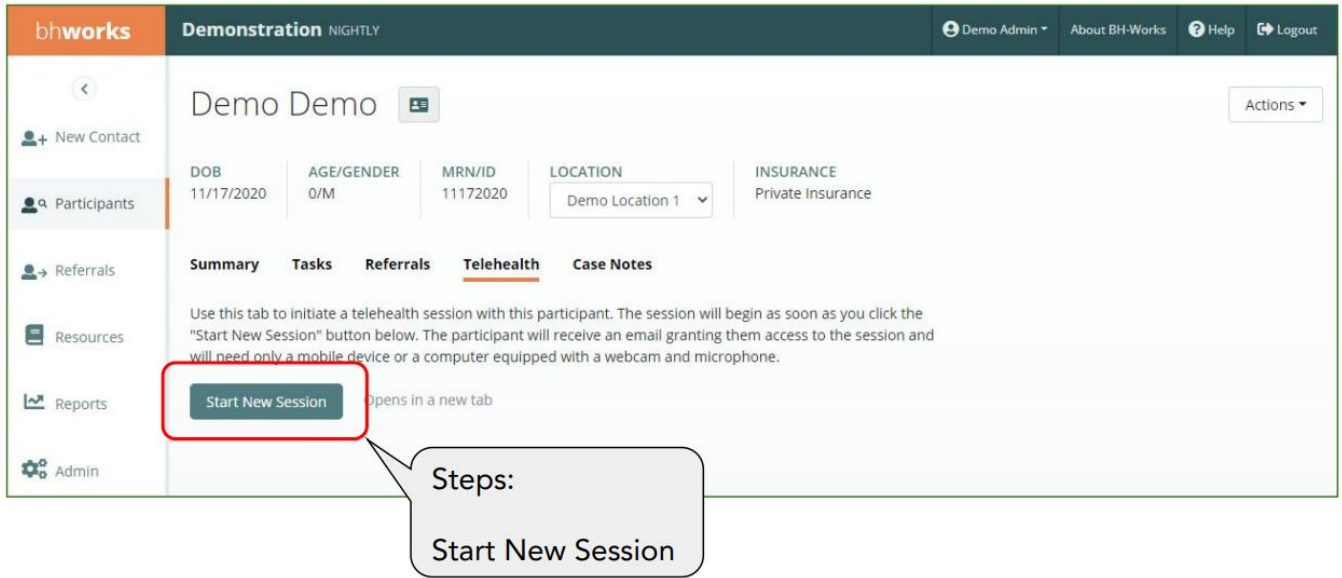
11. After entering relevant information for the individual student, you will have the option to Save and Return or Save and Finish. Note that once you click **Save and Finish**, you will not be able to edit the group note or individual note unless you click on the three dots and select “amend.”

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains a back arrow icon and several menu items: 'Participants' (with a magnifying glass icon), 'Groups' (with a group of people icon), 'Referrals' (with a person and arrow icon), 'My Services' (with a clipboard icon), 'Resources' (with a document icon), and 'Reports' (with a bar chart icon). The 'Groups' item is highlighted with an orange vertical bar. The main content area has a breadcrumb 'Test Group > Test Student' and a section titled 'Supporting Materials'. Below this is a section for 'Session Notes' which is currently empty. A large text area labeled 'Notes' is positioned below the session notes. At the bottom of the interface, there are three buttons: 'Save and Return' (dark teal), 'Save and Finish' (dark teal), and 'Cancel' (white with a grey border). A red 'Help' button with a question mark icon is located in the bottom right corner of the main content area.

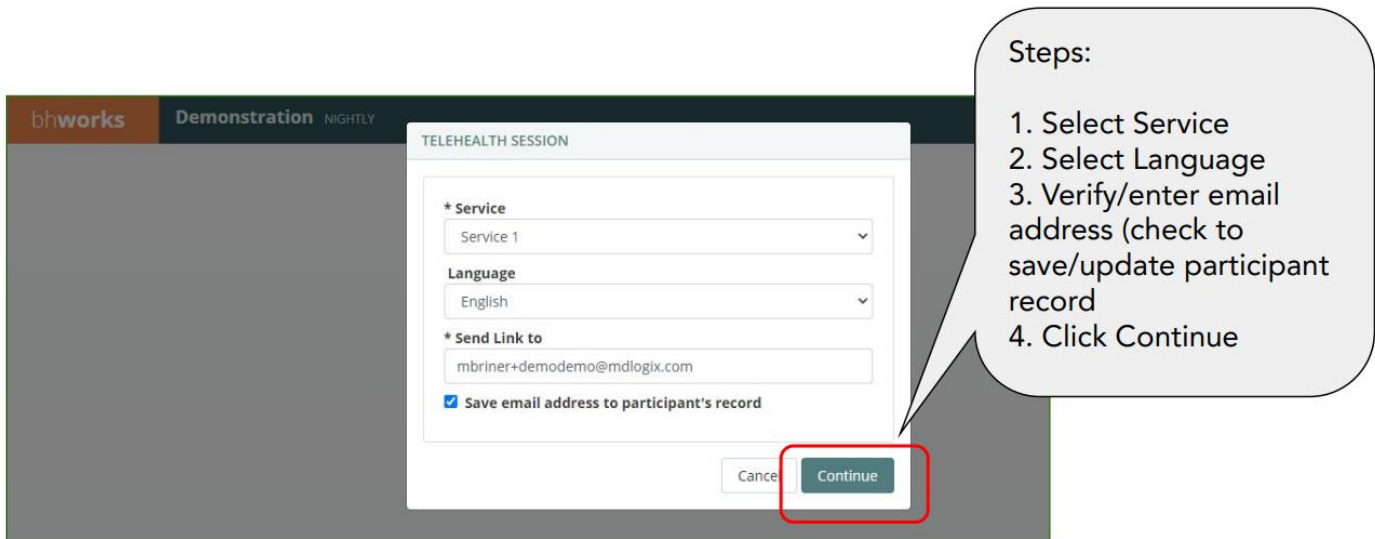
Telehealth

Bhworks includes telehealth (virtual care) functions that allow you to work with participants (patients, clients, students, or employees) remotely.

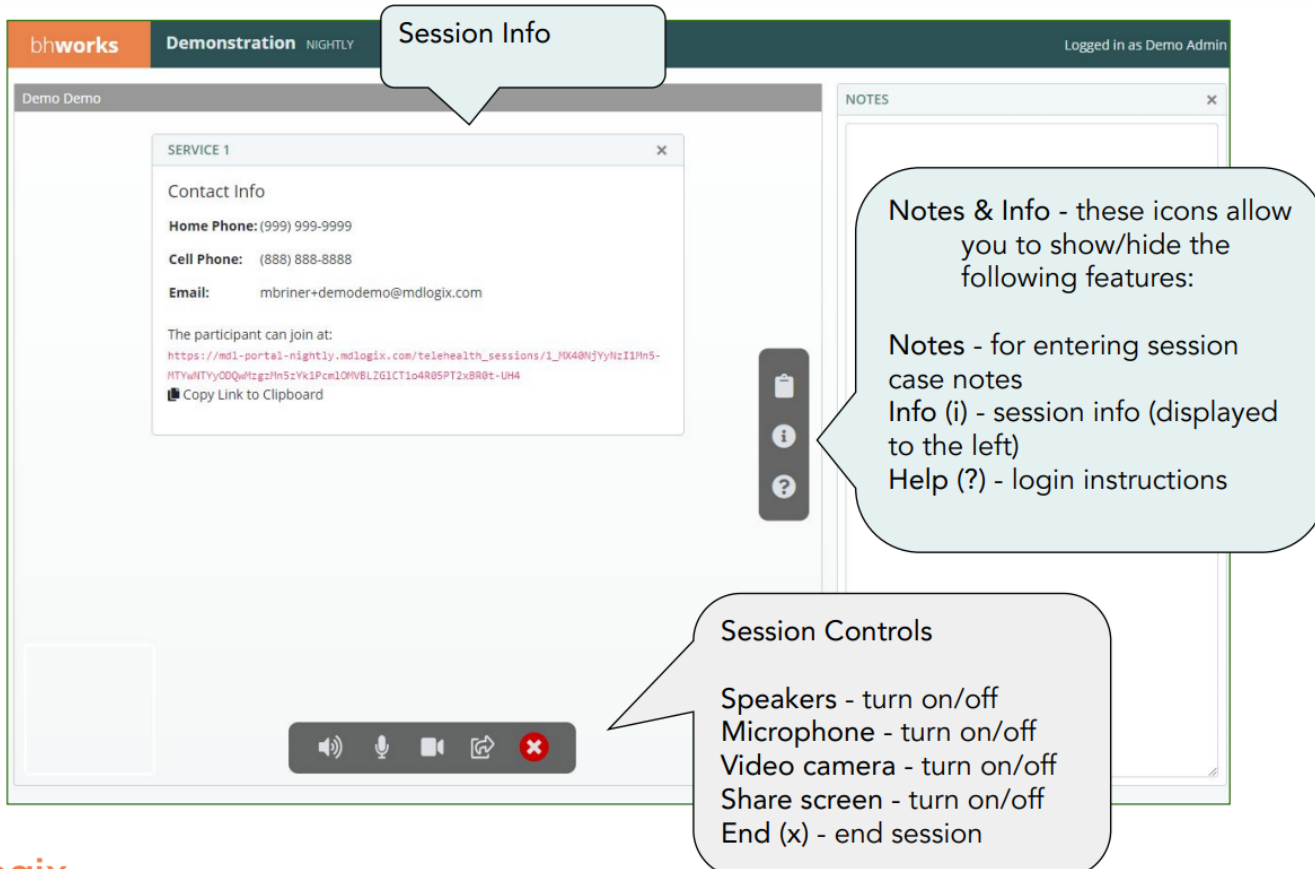
- a. In a participant's profile, one of the tabs says **Telehealth**. When you are ready to start a Telehealth session with that participant, click **Start New Session**.



- b. Click **continue**.

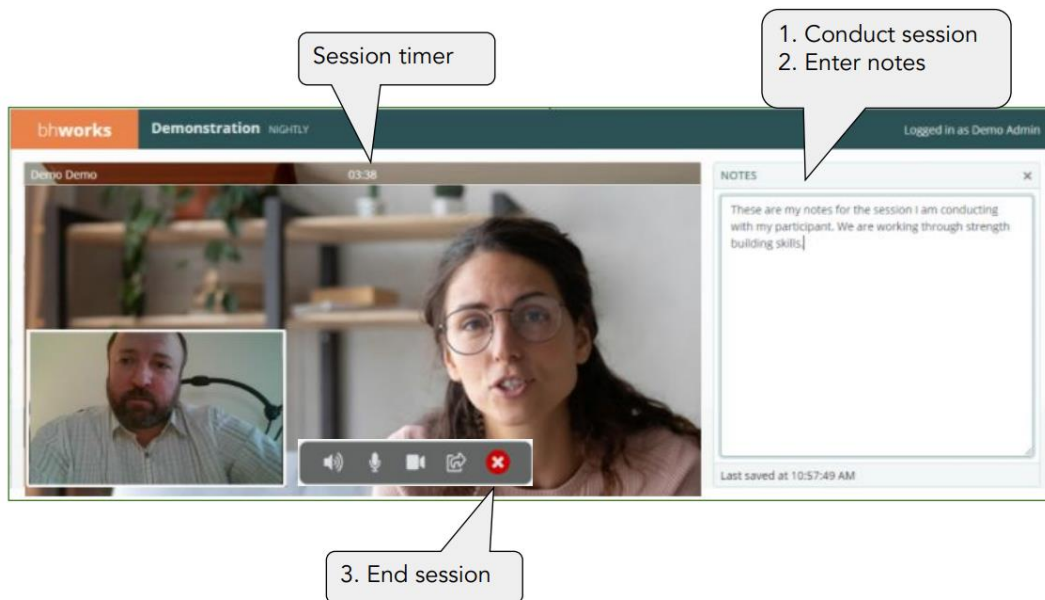


- c. A link to the session will have been sent to the participant's email address that was entered and they will be able to join the session.



doxix

- d. During the session, you will be able to take notes. The length of the session will be tracked and will end when you click the X



Service 1 with Demo Demo

Service	Service 1	Encounter Date	11/17/2020
Site of Encounter	Telehealth	Encounter Status	Finished
Language	English	Start Time	10:54 AM
		End Time	10:59 AM
		Duration	00:04:40
Documentation time		Travel time	

Notes
These are my notes for the session I am conducting with my participant. We are working through strength building skills.

Buttons: Edit, OK

Session Info - All session information (including notes entered) is saved when session is ended and a confirmation pop-up displayed.

Steps:
1. Click OK or Edit to update session info

PREVIOUS SESSIONS

Date	Service	Provider	Send to	Status	Duration	Notes
11/17/2020	Service 1	Admin, Demo	mbriner+demodemo@mdlogix.com	Finished	00:04:40	These are my notes for...

Previous Sessions show the participant's telehealth sessions, including:

- Date - data collection tasks
- Service - monitoring referrals
- Provider - recent services
- Sent to - email recipient
- Status - session status
- Duration - session length
- Notes - case notes

Steps:
Click to View/Edit session

bhworks Demonstration NIGHTLY Demo Admin About BH-Works Help Logout

Edit Case Note

* Service: Service 1 * Encounter Date: 11/17/2020

* Site of Encounter: Telehealth * Encounter Status: Finished

Language: English

* Start Time: 10 AM : 54 * End Time: 10 AM : 59

Documentation time: min. Travel time: min. Duration: 00:05:00

Service strategies
No service strategies have been assigned to this organization.

Notes
These are my notes for the session I am conducting with my participant. We are working through strength building skills.

Save Cancel

Steps:

1. Edit session info
2. Click *Save* button

Indirect Services

My Indirect Services

Indirect services are activities that do not involve interaction with a specific participant. Direct services (Case Notes) for a participant should be entered on the participant's Case Notes tab.

Date to Location

[+ Add Indirect Service](#)

INDIRECT SERVICES								TOTAL: 1:50 HOURS
Date	Service	Location	Grade	Attendees	Duration	Status	Updated	Documents
05/14/2024	Grief Support	Washtenaw ISD		3	01:15	Final	06/05/2024 11:00 PM	
05/14/2024	Grief Support	Washtenaw ISD		2	00:35	Final	06/05/2024 11:00 PM	

[Help](#)

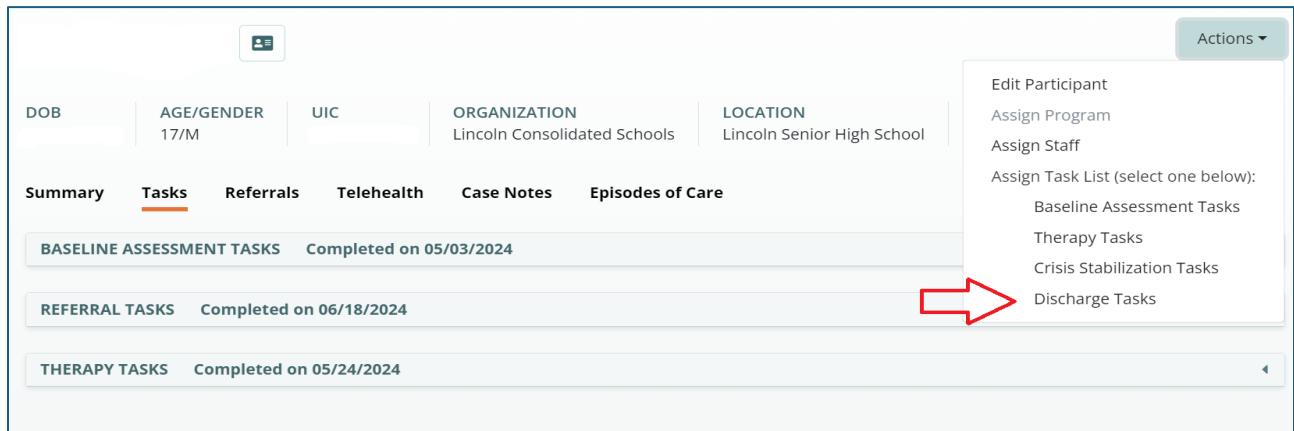
Indirect Non-caseload Student services include: school-wide crisis response, committee and special group meetings, , meeting with a school administrator, building/classroom-wide tier 1 supports, students attending tier 2 group sessions, or providing grief support.

Discharging a Student from Services

This should be discussed in advance with the student, parent(s)/guardian(s), and/or the administrator as able. The provider should also discuss and prepare the student for discharge several sessions prior to the final session and provide appropriate outside resources when necessary.

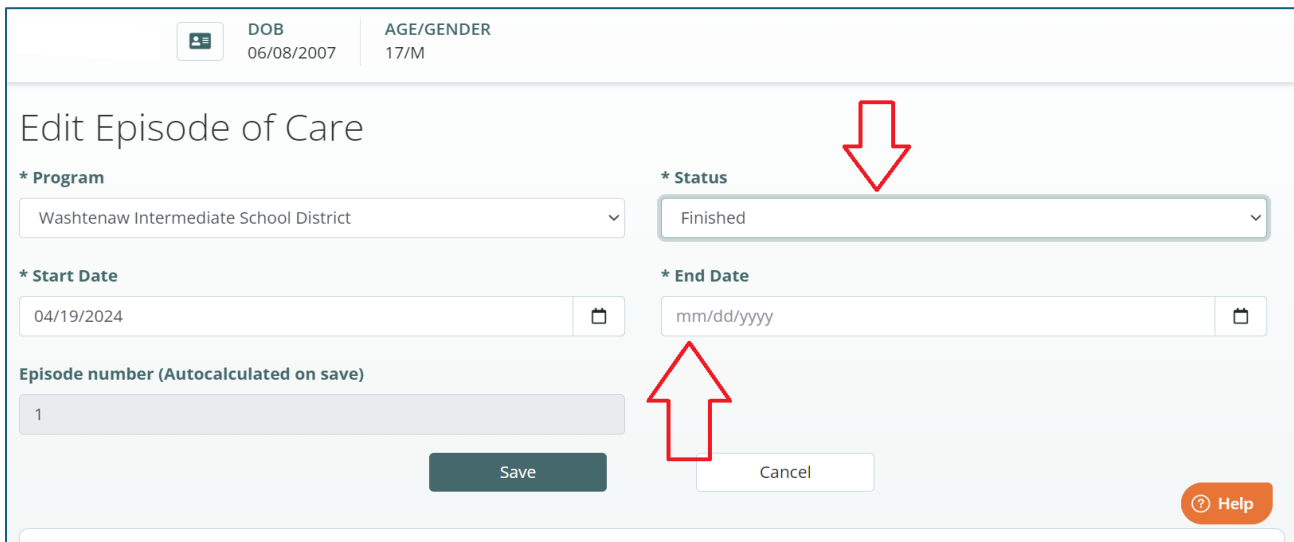
To exit a student from services:

- **Assign Discharge Tasks** under the **Actions** dropdown.



The screenshot shows a participant record page with the following details: DOB, AGE/GENDER (17/M), UIC, ORGANIZATION (Lincoln Consolidated Schools), and LOCATION (Lincoln Senior High School). The 'Tasks' tab is active, showing a list of tasks: BASELINE ASSESSMENT TASKS (Completed on 05/03/2024), REFERRAL TASKS (Completed on 06/18/2024), and THERAPY TASKS (Completed on 05/24/2024). The 'Actions' dropdown menu is open, showing options: Edit Participant, Assign Program, Assign Staff, Assign Task List (select one below): Baseline Assessment Tasks, Therapy Tasks, Crisis Stabilization Tasks, and Discharge Tasks. A red arrow points to 'Discharge Tasks'.

- Complete the **Discharge Summary**.
- Change the current **Episode of Care to Finished** and **input the End Date** under the Episode of Care tab.



The screenshot shows the 'Edit Episode of Care' form with the following details: Program (Washtenaw Intermediate School District), Status (Finished), Start Date (04/19/2024), and End Date (mm/dd/yyyy). The 'Episode number (Autocalculated on save)' is 1. The 'Save' and 'Cancel' buttons are visible. A red arrow points to the 'Status' dropdown menu, and another red arrow points to the 'End Date' field.

- To **remove a student** from your participant list. **Click the checkbox** next to their name. Select **Actions** and then **Unassign Staff**.

Informed Consent

Dear Parent/Guardian:

You are receiving this because your child has been referred to the Mental Health Services Team to assess if additional support is needed. We are very excited about the opportunity to collaborate with you and provide tools and strategies that will help your child succeed both in and out of school. Please fill out and return this form.

These services are intended to gather important data that will help support your child behaviorally, academically, socially, and emotionally. These services may include:

- Observing the Student in the School Setting
- Using Screening Tools
- Attending Team Meetings
- Individual and/or Group Therapy
- Community Resources
- Telehealth

Should schools go to remote learning, or you decide to have your child participate in remote learning, mental health services will continue to be available through telemental health.

Information and data gathered is intended to be kept confidential. However, information that will enhance the child's success in school may be shared with his/her teacher(s) and/or administrator(s) on a need-to-know basis. If there is specific information you do not want shared, please notify us. The therapeutic process is one that requires trust between the client and therapist; therefore, the student's confidentiality will be maintained. Limits to confidentiality required by law, include if a child discloses that he/she or another child is being hurt or is in danger and if a child threatens to harm him/herself or another person. Measures will be made to protect confidentiality, however, telehealth communications may be at greater risk of information being accessed by non-authorized persons, as computers and cell phones could be hacked, lost, or stolen.

Medicaid: If your child receives medical or social/emotional services listed above, has a Plan of Care, or needs crisis support services and is eligible or becomes eligible for Medicaid benefits at any time during the school year, we will share your child's information with the state Medicaid agency and its affiliates to obtain reimbursement. This may include name, address, date of birth, student ID, Medicaid ID, disability, dates, and services your child received.

The Medicaid School-Based Services Program:

- Provides partial reimbursement to school districts for school-based mental health services.
- Does NOT affect a family's Medicaid insurance benefits and there is NO cost to the family, now or in the future.
- Helps the school districts to offset some of the costs of health care provided to children.

This consent remains in effect one year from signature date. You have the right to withdraw this consent at any time by notifying your school district in writing.

AGREEMENT FOR TREATMENT/SERVICES

_____ YES - I AGREE for my child to receive school-based services as described above

_____ NO - I DO NOT AGREE for my child to receive school-based services as described above

CHILD NAME: _____

PARENT/LEGAL GUARDIAN NAME: _____

DATE: _____

By signing this form, I acknowledge that I have read and understand the above information.

SIGNATURE: _____

We believe working as a team is one of the most beneficial ways to support student progress, and we look forward to the possibility of being part of your child's team. Please provide your contact information.

EMAIL: _____

PHONE: _____