

Psychiatric Services and Clinical Knowledge Enhancement System (PSYCKES) Access and Training for Care Management Staff: Guidelines for Policies and Procedures

Care Management programs implementing PSYCKES should develop, document and implement policies and procedures for providing PSYCKES access and training, and for discontinuing PSYCKES access when it is no longer needed.

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Part One: PSYCKES Access

1. Obtain PSYCKES access for the agency
Once access is granted to the agency, the agency can grant PSYCKES access to individual users.

Relevant Procedures:

Follow steps 1-3 in the Protocol for PSYCKES Access. The steps for institutional access are:

- Complete and submit required documentation
- Register in OMH Security Management System (SMS)
- Designate Security Manager(s)¹

See [Access Protocol](http://www.omh.ny.gov/omhweb/psyckes_medicaid/initiatives/cm/implementation/access_protocol/) for details
(http://www.omh.ny.gov/omhweb/psyckes_medicaid/initiatives/cm/implementation/access_protocol/)

If the agency already has a Security Manager (e.g., to manage CAIRS access), consider adding another Security Manager to handle PSYCKES access.

1. “Security Manager” is a NYS OMH term referring to the individual within an institution who has been granted access to the OMH web-based Security Management System, through which they can grant any other staff at the institution access to PSYCKES and other OMH web-based applications.

2. Grant PSYCKES access to selected users

Designate PSYCKES users, identify the type of access they will need, and ask the Security Manager¹ to request access via SMS.

Relevant Policies:

- Staff must have HIPAA training before being granted PSYCKES access.*
- Each PSYCKES user has a unique User ID. Staff are not permitted to share PSYCKES user IDs, security tokens or PIN numbers. Staff should keep their tokens secure and their PIN numbers private.*
- Consider designating categories of staff that are permitted access to PSYCKES. (Note that all PSYCKES user types have access to clinical data.)*

*Existing policies may be sufficient but should be reviewed, and possibly modified, in relation to PSYCKES.

Relevant Procedures:

- Designate clearly which staff or categories of staff will be PSYCKES users and the type of access they will have:
 - Regular PSYCKES access: has access to PSYCKES data for all clients connected to the agency
 - Regular PSYCKES access *AND* Consent Module (“Registrar”) access: has access to PSYCKES data for the agency and its clients *AND* can grant access to additional client data by attesting that the client either has consented or is having a clinical emergency.

Note: PSYCKES does not limit the number or types of staff that can be PSYCKES users or registrars – this could include clinical, non-clinical, support staff, interns, etc., as needed.

- Designate staff to be point person(s) for coordinating PSYCKES access. (This may or may not be the Security Manager.)
- The point person(s) gather identifying information for each individual needing PSYCKES access and send access request to the Security Manager (if not the same person). Identifying information required for PSYCKES access:
 - Name
 - Title
 - Date of birth
 - Gender
 - Existing OMH User ID, if any
 - e-mail address
 - Mailing address
 - Type of access needed:
 - Regular PSYCKES access, *OR*
 - Regular PSYCKES access *plus* Consent Module (“Registrar”) access
- The Security Manager uses the on-line OMH Security Management System (SMS) to create User IDs and grant PSYCKES access.

Follow step 4 in the Protocol for PSYCKES Access: Security Manager enrolls PSYCKES users.

See [Access Protocol](#) for details

(http://www.omh.ny.gov/omhweb/psyckes_medicaid/initiatives/cm/implementation/access_protocol/).

- Security tokens for PSYCKES users are sent to the Security Manager. The Security Manager activates them and distributes them to the users or passes them to the point person(s) to distribute.
- Plan for ongoing operations; incorporate PSYCKES access request into existing procedures:
 - new employee orientation / paperwork
 - resident/fellow orientation / training

3. Revoke PSYCKES access when users no longer require access

When PSYCKES users terminate employment or no longer require PSYCKES access, the security manager disables their access. Users terminating employment should return their OMH security tokens

Relevant Policies:

- Only staff members who use PSYCKES should have access. PSYCKES access should be revoked for staff members who no longer need it.
- The OMH User IDs of terminated employees should be deactivated.

Relevant Procedures:

- Point person for coordinating PSYCKES access notifies Security Manager (if not the same person) when a staff member's access requirements change, either due to changing responsibilities or termination of employment.
- The Security Manager either deactivates the staff member's OMH User ID or revokes PSYCKES access, as appropriate.

Follow step 5 in the Protocol for PSYCKES Access: Security Manager revokes PSYCKES access for staff no longer requiring access. See [Access Protocol](#) for details (http://www.omh.ny.gov/omhweb/psyckes_medicaid/initiatives/cm/implementation/access_protocol/).

- Plan for ongoing operations: Disabling OMH User IDs and retrieving security tokens is integrated into existing procedures for departing employees

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Part Two: PSYCKES Training

4. Train initial cohort of implementation leadership

Relevant Procedures:

- Initial PSYCKES training group could include:
 - Member(s) of PSYCKES Care Management Implementation Team
 - Point person for coordinating PSYCKES access
 - Point person for PSYCKES training
 - Designated “super-users” (see below)
- Use PSYCKES resources
 - Attend training and train-the-trainer sessions
 - Attend PSYCKES webinars
 - Use PSYCKES online resources (recorded webinars, print materials)
 - Email [PSYCKES-Help](mailto:PSYCKES-Help@omh.ny.gov) (PSYCKES-Help@omh.ny.gov) with questions
- Designate a PSYCKES training point person who prepares to train broader staff

5. Train current staff who will use PSYCKES

Relevant Procedures:

- Develop internal PSYCKES training capability:
 - PSYCKES implementation leadership provides live training
 - Use PSYCKES “train the trainer” package
 - May supplement with PSYCKES live and/or recorded webinars
- Training should include:
 - Using PSYCKES:
 - Logging on
 - Clinical Summary
 - Recipient Search
 - Consent module
 - Internal policies and procedures related to PSYCKES, for example:
 - expectation of regular PSYCKES use; who is responsible for each task
 - PSYCKES security procedures (user ID, tokens)
 - how to introduce PSYCKES consent to clients
 - what is an emergency and who decides that emergency criteria are met
 - documentation requirements (e.g., Use only PSYCKES consent, retain clinical summary in chart, etc.)
 - any other policies and procedures developed by implementation team
- Optimal timing for training
 - Users already have access
 - Shortly before “go live” day

6. Develop “super-users”

Relevant Procedures:

- Identify one or two tech-savvy individuals
- Designate them as “super-users” and assign them to assist others with PSYCKES
- Train them well
- Consider having super-users start using PSYCKES before “go-live” day, to be better prepared to assist other staff

7. Provide support on “go live” day

Relevant Procedures:

- Designating a “go live day” and providing a high level of support on and around that day is crucial for success.
- Support is provided by
 - Implementation team leadership
 - Super-users
 - Email [PSYCKES-Help](mailto:PSYCKES-Help@omh.ny.gov) (PSYCKES-Help@omh.ny.gov) with questions

8. Plan for ongoing operations

Relevant Procedures:

- Develop training plan for new staff - e.g.: One-on-one training with administrator or super-user
- Use PSYCKES resources
 - Live webinars
 - Recorded webinars posted on website
 - Print materials posted on website
 - Email [PSYCKES-Help](mailto:PSYCKES-Help@omh.ny.gov) (PSYCKES-Help@omh.ny.gov) with questions
- Consider whether numbers are sufficient to include PSYCKES training in new hire orientation