

CARE Act Training & Technical Assistance

**MECHANISMS FOR DATA
SUBMISSION AND
SURVEYMONKEY DEMO**

CARE Act Data Collection and Reporting

November 1, 2023



This session is presented by Health Management Associates. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement by, California Department of Health Care Services.



[Slide Image Description: This cover slide introduces the title and category of this training. It contains the logos for the California Department of Health Care Services and Health Management Associates.]

Welcome to this training presented by HMA and DHCS on Mechanisms for Data Submission and Survey Monkey Demo.

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Presenters



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Consultant
Health Management Associates



KARIS BURNETT
Consultant
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[Slide Image Description: This slide includes images of the presenters of this training on a light blue background.]

HMA is DHCS' Training and Technical Assistance Contractor for the CARE Act project. HMA provides project management support, TTA coordination, development, provision, and iteration as well as providing TA to counties. HMA also supports the CARE Act Data Collection and Reporting by performing the following functions:

- Developing and managing data collection and reporting process
- Supporting county behavioral health data collection efforts
- Supporting the development of annual report
- Assisting DHCS' independent evaluation contractor with data collection to determine program outcomes, impact, and lessons learned related to the CARE Act program

Our presenters today are Cha Lee and Karis Burnett.

Cha Lee is a data analyst and researcher with data collection, management, analysis, interpretation and visualization experience in both clinical and patient care settings. Prior to joining HMA, Cha was a clinical research coordinator at Mayo Clinic Health

System. In this role, Cha provided information to patients about open studies, managed research regulatory documents, maintained study and patient files and created Epic reports for open studies.

Karis Burnett is a proactive, talented, and self-motivated data analyst dedicated to using her skills to identify and alleviate inequalities within the health care system. In her current role as a Consultant with Health Management Associates, Ms. Burnett has built dynamic and interactive dashboards in Power BI analyzing community needs using both qualitative and quantitative data. Karis has experience analyzing claims data, identifying disparities within data, analyzing financial feasibility for hospital systems and departments. Karis is experienced in analyzing mental health data from an equity lens.

Objectives

At the end of the session, participants will have an increased ability to:

- › Identify county responsibilities for data submission
- › Describe the two options for submitting monthly data for CARE participants: SurveyMonkey and MOVEit
- › Understand the county data flow chart used to collect the required data points in SurveyMonkey
- › Enter data in SurveyMonkey using embedded logic to ensure collection of required data based on CARE Act statute

[Slide Image Description: This slide shows the learning objectives for this training with a light blue background.]

Let's take a look at our learning objectives for today.

Our goal is that by the end of the session, participants will have an increased ability to:

- Identify county responsibilities for data submission
- Describe the two options for submitting monthly data for CARE participants: SurveyMonkey and MOVEit
- Understand the county data flow chart used to collect the required data points in SurveyMonkey
- Enter data in SurveyMonkey using embedded logic to ensure collection of required data based on CARE statute

Agenda

Reporting Responsibilities & Data Submission Mechanisms

- Review data reporting responsibilities for Judicial Council and county behavioral health agencies
- Compare SurveyMonkey and MOVEit
- Provide context for live demo of SurveyMonkey

Live Demo: SurveyMonkey Platform

- Navigate directly within the SurveyMonkey platform

Q&A

- Please submit questions throughout the presentation to be answered at the end

[Slide Image Description: This slide shows the major sections of this training on a light blue background.]

We are here today specifically to provide information on how Judicial Council and county behavioral health agencies will submit data for CARE Act participants. To that end, we'll be covering the reporting responsibilities for both organizations, and we will provide an overview of the data submission mechanisms: SurveyMonkey and MOVEit. Then, we will move into a live demo of the SurveyMonkey platform. There will be an opportunity for Q&A after the demo.

Currently, HMA and counties are working on gaining access to the MOVEit platform and more information will be made available soon.

We hope this session can be interactive, so please, if you have questions during the introduction or especially during the live demo, please submit them using the chat features.

The agenda will include the following sections:

- Reporting Responsibilities & Data Submission Mechanisms

- Review data reporting responsibilities for Judicial Council and county behavioral health agencies
- Compare SurveyMonkey and MOVEit
- Provide context for live demo of SurveyMokey
- Live Demo: SurveyMonkey Platform
 - Navigate directly within the SurveyMonkey platform
- Q&A



[Slide Image Description: This is a section divider slide to indicate a major section of this training.]

In this next section, we want to give you an overview or data reporting responsibilities and reporting mechanisms for CARE Act participant data.

Data Reporting Responsibilities for Judicial Council

- » Judicial Council is responsible for overseeing data points 3.2.1 to 3.2.6 at the aggregated level
- » These data points will be reported and stratified by county



[Slide Image Description: This slide shows six blue boxes that list the data points Judicial Council will be reporting and stratifying by county.]

Here, we will review the data reporting responsibilities for Judicial Council. If helpful, please follow along with the data dictionary. A link will be placed in the chat now or you can follow the link provided on the slide.

Judicial Council is responsible for collecting 6 data points:

- 3.2.1: Total Petitions Submitted
- 3.2.2: total Initial Appearances (Initial Hearings) held
- 3.2.3: total Hearings Held
- 3.2.4: Total CARE Plan Ordered
- 3.2.5: Total CARE Agreements Approved
- 3.2.6: Total Petitions Dismissed

These data points will be reported at the aggregated level and stratified by county. Trial courts will not have a mechanism to submit data to DHCS; they will submit data to the Judicial Council who will submit data on their behalf.

Link to CARE Act Data Dictionary: <https://www.dhcs.ca.gov/Documents/Enclosure-I->

CARE-ACT-Data-Dictionary-Version-1-0.pdf

Data Reporting Responsibilities for County Behavioral Health Agencies

» County behavioral health agencies are responsible for the remaining data elements at the individual level, **to the extent that data is available**



[Slide Image Description: This slide shows eleven blue boxes that list the data points Behavioral Health Agencies will be reporting and stratifying at the individual level.]

Here we've provided the data reporting responsibilities for county behavioral health agencies. You'll see counties are responsible for the remaining data elements, 3.3 Basic Client Information to 3.13 Hospitalizations and Emergency Department Visits at the individual level to the extent that data is available.

Differently from Judicial Council, counties will report the data at the individual level. Link to CARE Act Data Dictionary: <https://www.dhcs.ca.gov/Documents/Enclosure-I-CARE-ACT-Data-Dictionary-Version-1-0.pdf>

SurveyMonkey vs. MOVEit

- » County behavioral health agencies can choose to manually enter all required data on SurveyMonkey

OR

- » County behavioral health agencies can use the file format and submit the data through MOVEit

During a single reporting quarter, county behavioral health agencies must submit data using only one mechanism.

[Slide Image Description: This slide shows a description of data entry options within SurveyMonkey and MOVEit. An image of a pen on a paper with a graph is shown.]

Now that we've covered data reporting responsibilities. Let's cover how Judicial Council and county behavioral health agencies will submit data.

There are two options for submitting data, either via SurveyMonkey or MOVEit. While there are two options for data submission, **every reporting quarter, counties can only choose one mechanism to submit the data.** For example, in January of 2024, if county A chooses to use SurveyMonkey, all data must be entered into SurveyMonkey manually.

Today, we will focus on Survey Monkey. HOWEVER, information in this training is relevant to counties planning to bulk upload data via MOVEit. Because we will be walking through the data elements required over time. Understanding this will help counties as they develop or adjust their data architecture to support collection of data for the different CARE client groups and where they are during the CARE process.

Next, we'll provide more detail on SurveyMonkey and MOVEit.

Data Collection & Submission for County Behavioral Health: SurveyMonkey

- » The CARE Act data collection and reporting tool (DCRT) is hosted by SurveyMonkey, a cloud-based service
- » Logic is embedded within the CARE DCRT, so it only requires submission of data points relevant to the CARE client's current status
- » County behavioral health agencies can utilize this option for manual data entry
- » Users are allowed to save and return to the responses. However, once users finish and exit out of the survey, they will not be able to make any changes



[Slide Image Description: This slide shows the SurveyMonkey logo with information about how the SurveyMonkey platform can be used.]

Here is a little more information on the SurveyMonkey platform. It is a popular survey and data collection tool, so many of you may have already heard of it or even used it in your work or personal life.

SurveyMonkey is the cloud-based service selected to host the CARE Act data collection and reporting tool, or "DCRT".

The DCRT has logic built in, so it will only require the data points that are relevant to the client's current CARE status.

For those county behavioral health agencies that want do **manual data entry**, they can utilize this option. Users can save and return to responses before submission. However, once the survey is submitted, users will not be able to make any changes.

Data Collection & Submission for County Behavioral Health: MOVEit

- » MOVEit is a mechanism used for automated file transfers of sensitive data
- » HMA will define a file format that aligns with the structure of the CARE Act data dictionary
- » The file format allows users to query data from their existing data systems
- » This file format will be submitted through MOVEit



[Slide Image Description: This slide shows the MOVEit logo with information about how the MOVEit platform can be used.]

The second option for county behavioral health data submission uses a process where a file template is uploaded to the MOVEit platform. MOVEit is an existing mechanism for the transfer of data used by DHCS.

HMA will provide a file template that aligns with the structure of the CARE Act data dictionary. The file format will allow Judicial Council and county behavioral health agencies to query data from their existing data systems.

County behavioral health agencies that don't want to enter or re-enter the data into SurveyMonkey manually can use this option.

SurveyMonkey & MOVEit for Unavailable Information



Unknown or Unapplicable Date

- » Use 09/09/9999 if the date is unknown
- » Sometimes the date is not applicable. If this is the case, please use 09/09/9998



"Unknown" Option

- » Use the "Unknown" option on SurveyMonkey
- » Use the value code 99999 for unknown on the file format



If the CARE Act Data Dictionary does not include the **"Unknown"** or **"Not applicable"** option for a data point, county behavioral health agencies can leave it blank

[Slide Image Description: This slide shows three colored boxes that detail how to enter unavailable information in SurveyMonkey and MOVEit.]

A common question we want to cover early on relates to unavailable information: What should you do when information for a data point is not available?

Date

For a date data point, the county behavioral health agencies can use 09/09/9999 to indicate that it is unknown. Sometimes the data is not applicable. If this is the case, please use 09/09/9998 to indicate that the data is not applicable.

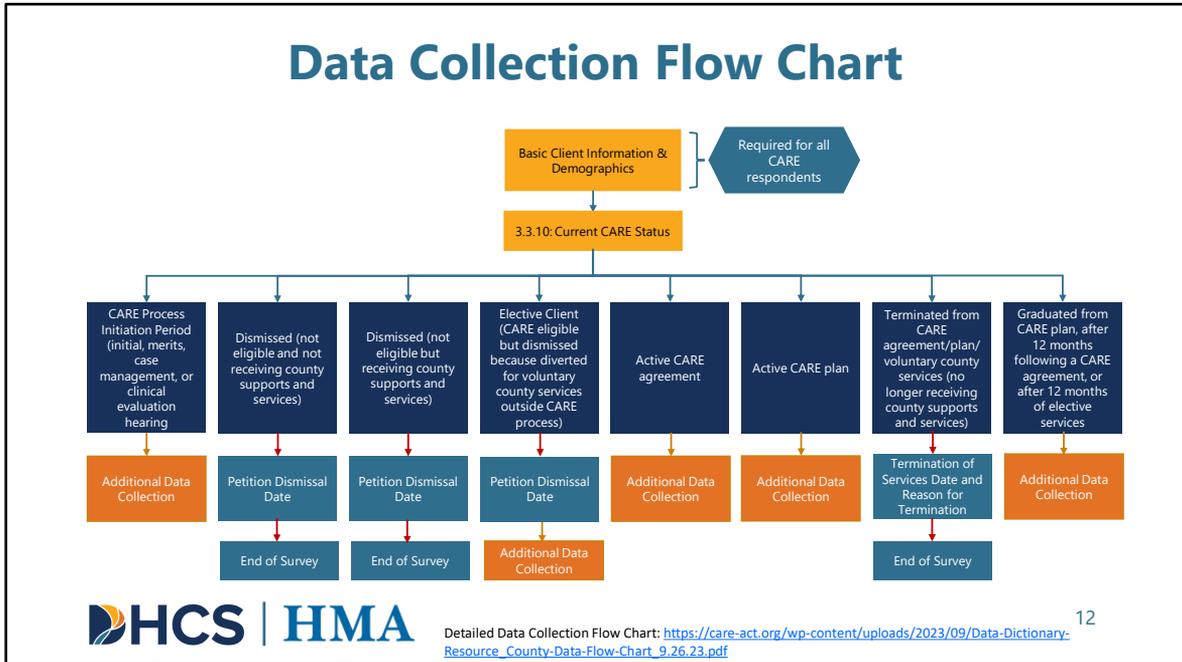
As an example, for **3.3.7 Petition File Date**, county behavioral health agencies can enter 09/09/9999 if the petition file date is unknown.

Numeric or Text

For the numeric or text data points, the option **"Unknown"** is available to be selected if using SurveyMonkey. If a file format is used, please the value code **99999**.

Sometime there will be a situation where information is unavailable for a data point,

but the CARE data dictionary does not have the option “**Unknown**” or “**Not applicable**” for that data point. If this is the case, county behavioral health agencies can **leave that data point blank**.



[Slide Image Description: This slide shows a flow chart that details the additional specifications for the 3.3.10 current CARE status.]

Now, we want to move into a demo of the SurveyMonkey platform. Before we do that, we think it’s helpful to review this high-level data collection flow chart that shows how 3.3.10 Current Care Status determines further data collection and reporting. The logic built into the SurveyMonkey platform is based on this flow chart.

The full flow chart has been provided as a resource in PDF form on the care-act website. You can download the full flow chart directly in the Resource Library, on the Training page, or using the link above. The full flow chart will detail all the required data points based on the current CARE status.

From the flow chart, Basic Client Information and Demographic information will be required for all CARE Respondents that flow through county behavioral health regardless of whether they end up receiving county behavioral health services.

Once the court has made a determination about the disposition of each CARE petition, county behavioral health will be asked to report on the CARE Status at the individual

level.

- In the Data Dictionary, it is 3.3.10 Current CARE Status.
- There are a number of options, and a client's CARE status could change over time.

Each potential CARE status is shown in the flow chart. You can see if additional data collection and reporting will be required depending on which CARE status is chosen. You will see that not all data points are going to be required for all clients.

For clients who are ineligible for CARE or those who do not end up receiving county behavioral health services, please note that these clients will not be tracked further by county behavioral health after counties provide their dates of dismissal from CARE Court. The flow chart here also states this information.

Link to Detailed Data Collection Flow Chart: https://care-act.org/wp-content/uploads/2023/09/Data-Dictionary-Resource_County-Data-Flow-Chart_9.26.23.pdf

Ideas in Action

- » Take 60 seconds now to review the data collection flow chart in-depth and identify any questions you have.



[Slide Image Description: This is an Ideas in Action slide that provides an opportunity for participants to practice using the information. It contains a checkbox and an arrow.]

Now, we want to pause to put these ideas into action. It's very important for those responsible for data reporting to be familiar with the detailed data collection flow chart we referenced on the previous slide. Take 60 seconds now to review the data collection flow chart in-depth and identify the required data points under each CARE status. Pay close attention to the required data points under "**Dismissed (not eligible and not receiving county supports and services)**" and "**Active CARE plan**" because these CARE status will be used as examples in the SurveyMonkey demo. I'll wait a few moments while you navigate to your browsers to view the full data collection flow chart.

As you take the survey in SurveyMonkey or use the file template, we highly recommend that you have this data flow chart open. It will tell you what to report in order from the first data point to the last data point.

Link to Detailed Data Collection Flow Chart: https://care-act.org/wp-content/uploads/2023/09/Data-Dictionary-Resource_County-Data-Flow-Chart_9.26.23.pdf



[Slide Image Description: This is a section divider slide to indicate a major section of this training.]

Now we will provide a live demo of the SurveyMonkey platform. First, we want to set the stage and share a case example that we will use to guide us through the data collection process.

What is Ming Wang's situation?

- » 42-years-old, single woman
- » Enrolled at Stanislaus County Behavioral Health
- » Diagnosed with schizophrenia
- » Living at Board and Care Home (B&C), but disappears for days at a time
- » Non-adherent to stabilizing medications
- » Progressively more paranoid regarding caregivers
- » Referred to the CARE Court by her family, confirmed eligible for services
- » Has a CARE plan that includes behavioral health treatment, housing and other supports



Case Example: Meet Ming Wang



*Disclaimer: This is a hypothetical case example.
Any resemblance to an actual person is purely coincidental*

[Slide Image Description: This slide shows a silhouette of a person representing Ming with a description of Ming's situation and eligibility.]

We will be using this vignette to demonstrate a hypothetical case that requires CARE Act data submission.

Let's meet Ming Wang.

Ming's situation:

- Ming is a 42-year-old single woman enrolled at Stanislaus County Behavioral Health, where she has been diagnosed with schizophrenia
- She lives at a Board and Care Home (B&C) but has been increasingly "disappearing" for up to days at a time
- She was non-adherent to stabilizing medications
- She was becoming more paranoid with her caregivers—accusing her caregivers of stealing from her and controlling her thoughts
- Her family referred her to the CARE program for services and supports
- **After the initiation process, she was determined to be eligible for CARE by the court**

- She is now on the CARE plan that includes behavioral health treatment, housing, and other supports

Disclaimer: This is a hypothetical case example. Any resemblance to an actual person is purely coincidental.

SurveyMonkey Live Demo's Key Takeaways

- » Demographic and basic client information are required every reporting month
- » 3.3.10 Current CARE Status is crucial every reporting month because it determines the required data points
- » The data flow chart is a guide to data collection and reporting for county behavioral health agencies. It lists all the required data points based on the CARE status, including the branching data points

[Slide Image Description: This slide shows a bullet point list of key takeaways from the live demo of SurveyMonkey.]

We think it's helpful to review the key takeaways from the demo before we begin. Please keep these in mind as we review the tool:

- Demographic and basic client information are required every reporting month
- 3.3.10 Current CARE Status is **crucial** every reporting month because it determines subsequent required data points
- The data flow chart is a guide to data collection and reporting for county behavioral health agencies . It lists all the required data points based on the CARE status, including the branching data points.

Logging into SurveyMonkey

- » Name of the survey: The Community Assistance, recovery, and Empowerment (CARE) Act (Final Draft V1)
- » Link to the survey: <https://www.surveymonkey.com/r/testingCARE2024>
- » Password: CARE2024!

[Slide Image Description: This slide shows a bullet point list of steps for logging into SurveyMonkey.]

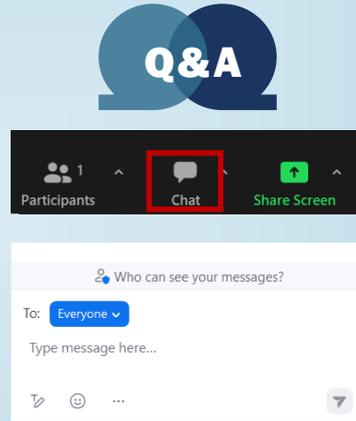
Before we start, I have provided the link to the survey in SurveyMonkey on the slide. We encourage you to follow along with the demo on your own browser. Please use the link and password provided. The link is [surveymonkey.com/r/testingCARE2024](https://www.surveymonkey.com/r/testingCARE2024) When you navigate to this page, it will ask you for a password. The monthly survey link is always going to be password protected. Only county staff who are responsible for data entry will have access to the link and password. The password to access the survey for today's demo is all capitals – CARE2024!

I'll wait a few moments here as people get logged on. Once you get to the welcome page, please hold.

Link to the survey: <https://www.surveymonkey.com/r/testingCARE2024>
Password: CARE2024!

Please submit your questions via the chat

- » Locate the “Chat” feature in the meeting control bar
- » A “Meeting Chat” window will open on the right side of your Zoom screen
- » Click “Type message here” to enter your question
- » Click the arrow icon on the bottom right to submit



[Slide Image Description: This slide includes text that reads “please submit your questions via the chat” and an image of two Q&A thought bubbles.]

We want this live demo portion to be as helpful as possible. If you have any questions as I move through the demo, please submit them using the chat feature and we will have time at the end of the session to review and respond to them. Please be as specific as possible so we can easily determine which part of the survey the question is referencing.

Now I will stop the presentation slide and go SurveyMonkey.

Live Demo: Introduction & Instruction

The Community Assistance, Recovery, and Empowerment Act Data Collection and Reporting Tool

Welcome to the Community Assistance, Recovery, and Empowerment (CARE) Act Data Collection and Reporting Tool (DCRT). This CARE Act DCRT is currently hosted by SurveyMonkey, a cloud-based service, for manual data entry. Logics are embedded within the DCRT so that it only requires data points relevant to the client's current status. County Behavioral Health Agencies are required to enter basic client information data throughout the measurement period to allow the DCRT to link information to clients over time. Demographic information data will be required for all new clients and those existing clients who have updated demographic information.

Within the CARE Act DCRT, users are able to save and return to the previous responses as responses are saved page by page. In order to save responses, click "next" to go to the next page of the CARE Act DCRT. It is required that users finish entering data for a client in one setting. Once the responses have been submitted, users will not be able to go back to those submitted responses.

When a response does not have an answer, please use 09/09/9999 for date and the "Unknown" option for non-date. If the "Unknown" or "Not applicable" option is not available, please leave the response blank.

The Department of Health Care Services (DHCS) contracted Health Management Associates (HMA) to provide training and technical assistance (TTA) to County Behavioral Health Agencies and providers to support data reporting for the CARE Act. If you need any technical assistance or need to edit the data for a client, please use the [Request CARE Act Data Collection and Reporting Assistance](#) form to submit the requests.



Next

[Slide Image Description: This slide shows an image of the introduction and instruction page of the SurveyMonkey tool.]

This is the first page of the tool in SurveyMonkey. It provides a welcome and short orientation to the survey. This page has instructions on how to save responses and how to deal with data points that are unavailable.

At the bottom of this introductory page, we include the link to the Request CARE Act Data Collection and Reporting Assistance form. If users need any technical assistance or need to edit the data for a client, they can use this form to submit the requests.

Data Collection and Reporting Technical Assistance Request Form:

https://docs.google.com/forms/d/e/1FAIpQLSeqgKj1SJRZHy_OEBhHCYRFghyJL7P3uDR0SGpxF5tMOsv_pw/viewform

Once you've read this information and are ready to move on, there will be a blue box at the bottom of the page that says "Next". Click "Next" to move to the next page in the survey.

Live Demo: Reporting Month

» 3.3.1 Reporting Month (Date)

Reporting Month

* 3.3.1: What is the reporting month for this submission?

Reporting Month (Date)

Date

MM – Two-digit month, must be a value from 01 through 12.
DD – Two-digit day, must be a value from 01 through 31 and a valid day for the month.

YYYY – Four-digit year, must be a value that is at least 2023.

Create a new submission for each new petition, even if it is associated with an individual who had a prior petition. If January 2024 data is being reported, please enter the date corresponding to the last day of that month 01/31/2024.

← 2%

Prev Next

[Slide Image Description: This slide shows an image of the reporting month page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

When you click “**Next**”, you will be directed to the first data point, which is **Reporting Month**. You will see an asterisk next to the question. This means a response is required. Each data point will also have a number associated with it, here it is 3.3.1. This number maps to the data dictionary. For more information on any data point referenced throughout this demo, please note the data element number and find that same number in the data dictionary.

This data point is required because it establishes a time stamp, which is very important for our back-end work. You cannot go to the next page until you enter a date.

On each page of the survey, we have included the data specifications in red text.

The specification for **Reporting Month** states that the date should correspond to the last day of the reporting month. If January 2024 data is being reported, the county should enter **01/31/2024**.



Let's assume that we are reporting data for **January 2024**. We will enter **01/31/2024** and then click "**Next**".

Live Demo: Basic Client Information

- » 3.3.1 County
- » 3.3.2 Current First Name
- » 3.3.3 Current Last Name
- » 3.3.4 Age
- » 3.3.5 Social Security Number
- » 3.3.6 Petition Case Number
- » 3.3.7 Petition File Date
- » 3.3.8 Date of Investigation
- » 3.3.9 Original Petitioner

Basic Client Information

* 3.3.1: Which county was assigned by the court to investigate or follow this client in the reporting month?

* 3.3.2: What is the client's current first name?

* 3.3.3: What is the client's current last name?

* 3.3.4: What is the client's date of birth?

Date of Birth

Date
MM/DD/YYYY

MM – Two-digit month, must be a value from 01 through 12.
DD – Two-digit day, must be a value from 01 through 31 and a valid day for the month.
YYYY – Four-digit year, must be a value that is at least 1899.
09/09/9999 – Use this date if the date of birth is unknown. Must update date of birth when it is known.

This data point will be used to determine the age of the client at the time the petition was submitted. If multiple petitions were submitted, use the date of birth included on the most recent petition. This will be used to link clients across survey submissions and will be asked at every time point.

[Slide Image Description: This slide shows an image of the basic client information page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

This page requests basic client information. **Basic Client Information** and **Demographic Information** are always required for all CARE respondents that flow through county behavioral health regardless of whether they end up receiving county behavioral health services.

If you refer to the high-level data flow chart provided, this is the first element. You will be required to report data points 3.3.1 to 3.3.9.

Let's now move through the questions on this page of the survey. **As a reminder, please always read the additional specification information in red text.**

We will use Ming Wang as an example.

3.3.1 Which county was assigned by the court to investigate or follow this client in the reporting month?

- We will select the reporting or investigating county.
- Let's select "**Stanislaus County**".

3.3.2: What is the client's current first name?

- We enter the client's first name.
- Let's enter "**Ming**".

3.3.3 What is the client's current last name?

- We enter the client's last name.
- Let's enter "**Wang**".

3.3.4: What is the client's date of birth?

- We enter the client's date of birth. We use the date of birth to determine age.
- Let's enter "**09/05/1981**".

3.3.5: What is the client's Social Security Number (SSN)? (If social security number is not available, please use the client's Medi-Cal beneficiary number.)

- We enter the client's **SSN**.
- Let's enter "**123-45-6789**".
- If the **SSN** is not available, please use the **Medi-Cal beneficiary number**. This information is stated in the additional specification.
- Please be consistent and report the same number every month. If you use the **SSN**, it has to be the **SSN** every month until there is no more tracking for this client. Do not switch between **SSN** and **Medi-Cal beneficiary number**

3.3.6: What is the CARE petition case number?

- We enter the petition case number.
- Let's enter "**123456789**".

3.3.7: What date was the CARE petition filed?

- We enter the petition file date.
- Let's enter a random date.

3.3.8: On what date did the court order the investigation?

- We enter the date of investigation.
- For Ming, the date of investigation is not applicable. From the additional specification, we will enter "**09/09/9998**".

3.3.9: Who filed the original CARE petition?

- We select the original petitioner.
- Ming is referred by a family member who live with her.
- We will select "**A person who lives with the respondent.**"

- There are many different options for the petitioner. Choose the option that makes the most sense for the client.

Now that we've entered all required data points from 3.3.1 to 3.3.9, we click "**Next**" to go to the next page.

Live Demo: New Client/New Demographic Information

New Client/New Demographic Information

* Was this client new, or does demographic information need to be updated?

Yes

No

Demographic information is required for all new clients. If the demographic information needs to be updated for an existing client, please also select "Yes" for this question.

NEW QUESTION

or Copy and paste questions

3%

Prev

Next

[Slide Image Description: This slide shows an image of the new client and new demographic information page of the SurveyMonkey tool.]

The next page will request **demographic information**. The **demographic information** is always required. To reduce the burden of re-entering demographic information for existing clients, we have added this question. As you can see, it doesn't have the data point number.

Selecting "**No**" will allow you to skip re-entering demographic information for existing clients. If the client is new or an existing client who has new demographic data, you will select "**Yes**", which will direct you to the demographic section. If you select "**No**", it will skip the demographic section and take you to the **Current CARE Status** section.

We have now updated demographic information for Ming, so we will select "**Yes**" and click "**Next**".

Live Demo: Demographic Information

- » 3.4.1 Sex
- » 3.4.2 Race
- » 3.4.3 Ethnicity
- » 3.4.4 Tribal Affiliation
- » 3.4.5 Tribal Services
- » 3.4.6 Disability
- » 3.4.7 Preferred Language
- » 3.4.8 Sexual Orientation
- » 3.4.9 Gender Identification
- » 3.4.10 Employment Status
- » 3.4.11 Veteran Status
- » 3.4.12 Immigration Status
- » 3.4.13 Health Care Coverage Status
- » 3.4.14 County of Residence

Demographics

(e)(1) The demographics of participants, including, but not limited to, the age, sex, race, ethnicity, disability, languages spoken, sexual orientation, gender identity, housing status, veteran status, immigration status, health coverage status, including Medi-Cal enrollment status, and county of residence, to the extent statistically relevant data is available.

* 3.4.1: What is the client's sex?

- Male
- Female
- Other
- Unknown

The use of unknown aligns with Medi-Cal data dictionary. When sex is intentionally not selected, use Unknown.

[Slide Image Description: This slide shows an image of the demographic information page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

Because we have indicated that Ming has new demographic information, next on the data flow chart and on SurveyMonkey is the **demographic information**.

If you have the data flow chart opened, you will see that data points **3.4.1** to **3.4.14** are required. The data flow chart also tells us that both **3.4.4 Tribal Affiliation** and **3.4.5 Tribal Services** will be available when “**Alaskan Native or American Indian**” is selected for **3.4.3 Race**.

From the data flow chart, the branching questions are in the orange box. To illustrate the branching questions, let’s assume that Ming is “**Alaskan Native or American Indian**” for **3.4.3 Race**. When we click “**Next**” on the demographic section, we should get **3.4.4 Tribal Affiliation** and **3.4.5 Tribal Services**.

Let’s go back to the demographic information section by clicking “**Prev**”. If we did not select “**Alaskan Native or American Indian**” and have selected “**Chinese**” for **3.4.3 Race**

instead, when we finish entering the demographic information and click “**Next**”, it should take us to **current CARE status information** page.

Live Demo: Important Specification Information for Current CARE Status

Important Specification Information for Current CARE Status

Please read this important specification information before continuing to the next page.

The next page will ask for the client's current CARE status. This data is based on the client's CARE status. It must be reported every month.

If there is a change in CARE status during the same calendar month, please complete the survey twice. For example, a client may undergo the CARE process initiation between 01/01/2024 to 01/14/2024 and receive court approval for a CARE agreement on 01/15/2024. The county will complete one survey for the CARE process initiation period and a second survey to capture services and supports received between 01/15/2024 through 01/31/2024 (Active Service Period). This applies to CARE status change from:

- CARE Process Initiation Period (initial, merits, case management, or clinical evaluation hearing) to Active CARE agreement
- CARE Process Initiation Period (initial, merits, case management, or clinical evaluation hearing) to Active CARE plan
- CARE Process Initiation Period (initial, merits, case management, or clinical evaluation hearing) to Elective Client (CARE eligible but dismissed because diverted for voluntary county services outside CARE process.)

The survey will be completed twice for these CARE status changes to establish baseline data during the CARE Process Initiation Period and capture data during the Active Service Period.

Termination is defined as premature exit from CARE process or voluntary county services.

For clients who are terminated from county supports and services, counties must report data from the Active Service Period during the month of termination.

[Slide Image Description: This slide shows an image of the important specification information for current CARE status page of the SurveyMonkey tool.]

This page has a very important specification information for **3.3.10 Current CARE Status**. It is important that you read this note before continuing to the next page and answering 3.3.10 Current CARE Status.

From the specification information, we learn that **3.3.10 Current CARE Status** is always required for every reporting month and users must complete the survey twice when there is a change of CARE status within the same reporting month for a client.

Once we have read the details, we can click **“Next”**.

Live Demo: 3.3.10 Current CARE Status

- » 3.3.10 Current CARE Status
 - 3.3.11 Petition Dismissal Date
 - 3.3.12 Termination of Services Date
 - 3.3.13 Reason for Termination
 - 3.3.14 Graduation Date

Current CARE Status Information

* 3.3.10: What is the client's current CARE status? 0

- CARE Process Initiation Period (initial, merits, case management, or clinical evaluation hearing)
- Dismissed (Not eligible and not receiving county supports and services)
- Dismissed (Not eligible but receiving county supports and services)
- Elective Client (CARE eligible but dismissed because diverted for voluntary county services outside CARE process)
- Active CARE agreement
- Active CARE plan
- Terminated from CARE agreement/plan/voluntary county services (no longer receiving county supports and services)
- Graduated from CARE plan, after 12 months following a CARE agreement, or after 12 months of elective services

or copy and paste questions

[Slide Image Description: This slide shows an image of the current CARE status page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

This page is where users will be asked to report current CARE status.

3.3.10 Current CARE Status is a very crucial data point and must be reported every reporting month. Based on the selected CARE status for the client in the reporting month, it will determine all the required data points.

There are 8 CARE statuses, and each CARE status will have different required branching data points.

Options 1 to 3 are only applicable for those clients during the **CARE initiation Period**.

Options 4 to 6 (**Elective, Active CARE agreement, Active CARE plan clients**) are only applicable for those clients during the **Active Service Period**. County behavioral health will track these clients.

Option 7 (**termination**) is only applicable for **Elective, Active CARE agreement, Active CARE plan clients** who got terminated from the Active Service Period.

Lastly, option 8 is used for the **Follow-Up Period**. This option is only applicable for the **Elective, Active CARE agreement, Active CARE plan clients** who have finished the **Active Service Period**.

Based on the selected current CARE status, the tool will show the different required data points. In this presentation, we will use **Dismissed (Not Eligible and Not Receiving County Supports and Services)** and **Active CARE plan for Ming** as examples.

Live Demo: Dismissed (Not Eligible and Not Receiving County Supports and Services)

Current CARE Status Information

* 3.3.10: What is the client's current CARE status?

- CARE Process Initiation Period (initial, merits, case management, or clinical evaluation hearing)
- Dismissed (Not eligible and not receiving county supports and services)
- Dismissed (Not eligible but receiving county supports and services)
- Elective Client (CARE eligible but dismissed because diverted for voluntary county services outside CARE process)
- Active CARE agreement
- Active CARE plan
- Terminated from CARE agreement/plan/voluntary county services (no longer receiving county supports and services)
- Graduated from CARE plan, after 12 months following a CARE agreement, or after 12 months of elective services

Progress bar: 1%

Prev Next

Date of Petition Dismissal

3.3.11: If applicable, on what date was the CARE petition dismissed?

Petition Dismissal Date

Date
MM/DD/YYYY

MM – Two-digit month, must be a value from 01 through 12.
DD – Two-digit day, must be a value from 01 through 31 and a valid day for the month.
YYYY – Four-digit year, must be a value that is at least 2023.

This field will be available when the options below are selected for Current CARE Status.

Dismissed (Not eligible and not receiving county supports and services)
Dismissed (Not eligible but receiving county supports and services)
Elective Client (CARE eligible but dismissed because diverted for voluntary county services outside CARE process)

Enter this data once when CARE clients are dismissed or diverted to voluntary county services outside CARE process.

Progress bar: 6%

Prev Next

[Slide Image Description: This slide shows an image of the current CARE status and date of petition dismissal pages of the SurveyMonkey tool.]

First, I'd like to show you what happens when you choose Dismissed (Not Eligible and Not Receiving County Supports and Services).

Ming is already on the CARE plan. Let's go back to the initiation period and assume that Ming got dismissed and never got put on the CARE plan.

We will select this current CARE status for **Ming** and click "Next".

If you have the data flow chart opened, you can see that we will only need to report **3.3.11 Petition Dismissal Date** and the survey should end after providing the dismissal date.

Let's provide a random date for **3.3.11 Petition Dismissal Date** and click "Next". The survey should end.

Live Demo: Active CARE Plan

Current CARE Status Information

* 3.3.10: What is the client's current CARE status?

- CARE Process Initiation Period (initial, merits, case management, or clinical evaluation hearing)
- Dismissed (Not eligible and not receiving county supports and services)
- Dismissed (Not eligible but receiving county supports and services)
- Elective Client (CARE eligible but dismissed because diverted for voluntary county services outside CARE process)
- Active CARE agreement
- Active CARE plan
- Terminated from CARE agreement/plan/voluntary county services (no longer receiving county supports and services)
- Graduated from CARE plan, after 12 months following a CARE agreement, or after 12 months of elective services



[Slide Image Description: This slide shows an image of the current CARE status page of the SurveyMonkey tool. With the active CARE plan option checked.]

Now, let's go back to 3.3.10 and choose **"Active CARE plan"** for **3.3.10 Current Care Status**.

If Ming has a change of CARE status from CARE process Initiation Period to Active CARE plan within the same month, we will first establish the baseline data by selecting the **"CARE Process Initiation Period"** option to report the data. After that, we will fill out another survey for Ming by selecting the **"Active CARE plan"** option.

Let's assume that we already have established the baseline data for Ming. We will select **"Active CARE plan"** and click **"Next"**.

Live Demo: Services and Supports

Statute 5985 for Services and Supports

(e)(2) The services and supports ordered, the services and supports provided, and the services and supports ordered but not provided.

(e)(4) Treatments continued and terminated at least one year following termination of the CARE plan, to the extent administrative data are available.

(e)(13) Statistics on the services and supports included in CARE plans, including court orders for stabilizing medications.

(e)(14) The rates of adherence to medication.



[Slide Image Description: This slide shows an image of the statute 5985 for services and supports page of the SurveyMonkey tool.]

If you look at the data flow chart, it shows that this status will require almost all the data elements.

After clicking “**Next**”, it should take us to a page that reviews the CARE Act statute language for **Services and Supports**. We will click “**Next**” again.

Live Demo: Mental Health Treatment Services

- » 3.5.1 Mental Health Treatment Services Provided
 - 3.5.6 Stabilizing Medications
 - 3.5.7 Type of Stabilizing Medication
 - 3.5.8 Stabilizing Medications Adherence
- » 3.5.2 Mental Health Treatment Services in CARE Agreement or Plan
 - 3.5.5 Stabilizing Medications in CARE Agreement or Plan
- » 3.5.3 Mental Health Treatment Services in CARE Agreement or Plan Not Provided
- » 3.5.4 Reason for Mental Health Services in CARE Agreement/Plan Not Provided

Services and Supports for Mental Health Treatment Services Provided

* 3.5.1: What mental health treatment services were provided to the client in the reporting month? (Check all that apply)

- Adult Crisis Residential Services
- Adult Residential Treatment Services
- Crisis Intervention
- Crisis Stabilization
- Day Rehabilitative (Half-Day & Full-Day)
- Day Treatment Intensive (Half-Day & Full-Day)
- Intensive Care Coordination
- Intensive Home Based Services
- Medication Support
- Psychiatric Health Facility Services
- Psychiatric Inpatient Hospital Services
- Targeted Case Management
- Therapeutic Behavioral Services
- Therapeutic Foster Care

[Slide Image Description: This slide shows an image of the services and supports for mental health treatment services provided page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

We will first focus on the **Mental Health Treatment Services** questions.

The first data point is **3.5.1: Mental Health Treatment Services Provided**.

“**Adult Crisis Residential Services**”, “**Adult Residential Treatment Services**”, and “**Crisis Intervention**” have been provided to Ming. We will select these options and click “**Next**”. It should take us to **3.5.2 Mental Health Treatment Services in CARE Agreement or Plan**.

We will click “**Prev**” and go back. If we look at the data flow chart, it tells us that **3.5.6 Stabilizing Medications**, **3.5.7 Type of Stabilizing Medication**, and **3.5.8 Stabilizing Medications Adherence** are only required when a preceding data point triggers them. “**Medication Support**” has to be selected from **3.5.1 Mental Health Treatment Services Provided** for these data points to show up.

Ming is non-adherent to stabilizing medications, and as a result, she has been prescribed the long-acting injectable medication every 3 months.

Now, on **3.5.1 Mental Health Treatment Services Provided**, we will select “**Medication Support**”, as well and click “**Next**”.

It will take us to **3.5.6 Stabilizing Medications**. We will provide an answer to it. If we select “**No**” or “**Unknown**”, we will be skipped to **3.5.2 Mental Health Treatment Services in CARE Agreement or Plan**.

Ming is receiving the long-acting injectable antipsychotic medication.

We will select “**Yes**” for **3.5.6 Stabilizing Medications** and click “**Next**”.

It will take us to **3.5.7 Type of Stabilizing Medication**. We will select “**Yes**” and click “**Next**”.

It will take us to **3.5.8 Stabilizing Medications Adherence**. Because Ming has the long-acting injectable and the dosage is not due in the reporting month, it will be option 1: “**Taken as prescribed 80% to 100% of the time**”. We will select option 1 and then click “**Next**”.

We should finish the branching questions and be on **3.5.2 Mental Health Treatment Services in CARE Agreement or Plan**. Let’s assume that the CARE plan lists “**Crisis Intervention**” and “**Crisis Stabilization**”. We will click these two options and click “**Next**”.

It will direct us to **3.5.3 Mental Health Treatment Services in CARE Agreement or Plan Not Provided**. From the data flow chart, we understand that we do not get **3.5.5 Stabilizing Medications in CARE Agreement or Plan** because “**Medication Support**” is not selected. The options should be the selected options from **3.5.2 Mental Health Treatment Services in CARE Agreement or Plan**. We should have “**Crisis Intervention**” and “**Crisis Stabilization**”.

The answer(s) on **3.5.3 Mental Health Treatment Services in CARE Agreement or Plan Not Provided** is looped with **3.5.4 Reason for Mental Health Services in CARE Agreement/Plan Not Provided**.

Let's assume that "**Crisis Intervention**" is not provided. We will select this option and click "**Next**".

We will be looped to provide a reason that "**Crisis Intervention**" were not provided. We will click "**Prev**" and go back.

On **3.5.3 Mental Health Treatment Services in CARE Agreement or Plan Not Provided**, if you select "**None**", it will uncheck all the other boxes and you will not be looped to provide a reason.

For Ming, both "**Crisis Intervention**" and "**Crisis Stabilization**" are not provided. We will select these two options and click "**Next**".

We will first be asked to provide a reason for "**Crisis Intervention**". Let's select "**Client declined**" as the main reason and click "**Next**".

We also have checked "**Crisis Stabilization**", so we will need to provide a reason for it. Let select "**Not available**" and click "**Next**".

Now we should be done with the mental health treatment services questions.

Live Demo: Substance Use Disorder

- » 3.5.9 Substance use Disorder Treatment Services
- » 3.5.10 SUD Treatment Services in CARE Agreement or Plan
- » 3.5.11 SUD Treatment Services in CARE Agreement/Plan Not Provided
- » 3.5.12 Reason for SUD Services in CARE Agreement/Plan Not Provide

Services and Supports for Substance Use Disorder Treatment Services

* 3.5.9: What SUD treatment services were provided to the client in the reporting month? (Check all that apply)

- Assessment
- Care Coordination
- Clinician Consultation
- Family Therapy
- Group Counseling
- Individual Counseling
- Medical Psychotherapy
- Medication Services
- Medication for Addiction Treatment (also known as medication assisted treatment (MAT) for Opioid Use Disorders (OUD))
- Medication for Addiction Treatment (also known as medication assisted treatment (MAT) for Alcohol Use Disorders (AUD) and Other Non-Opioid Substance Use Disorders)
- Medications for Addiction Treatment (Medications)
- Mobile Crisis Services: State Plan Amendment Forthcoming
- Patient Education

[Slide Image Description: This slide shows an image of the services and supports for substance use disorder treatment services page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

After mental health treatment services, we will focus on the substance use disorder questions. The rest follows very a similar structure as mental health treatment services. It will ask for the services and supports provided, listed in CARE plan or agreement, listed in CARE plan or agreement but not provided, and reason.

We will first start with 3.5.9: SUD Treatment Services. **“Assessment”**, **“Care Coordination”**, and **“Clinician Consultation”** have been provided to **Ming**. We will check these options and click **“Next”**.

It should take us to **3.5.10 SUD Treatment Services in CARE Agreement or Plan**. **“Medication Services”** is listed in the CARE plan. We will select this option and click **“Next”**.

We are now directed to **3.5.11 SUD Treatment Services in CARE Agreement/Plan Not Provided**. We need to confirm if **“Medication Services”** has been provided or not. Let’s

select “**None**” and click “**Next**”.

We should not be asked for a reason, and it should take us to the CalAIM questions.

Live Demo: CalAIM

- » 3.5.13 CalAIM Community Supports Provided
- » 3.5.14 CalAIM Community Supports in CARE Agreement/Plan
- » 3.5.15 CalAIM Community Supports in CARE Agreement/Plan Not Provided
- » 3.5.16 Reason for CalAIM Community Supports Not Provided

Services and Supports for CalAIM Community Supports

* 3.5.13: What CalAIM community support services were provided in the reporting month? (Check all that apply)

- Housing Transition Navigation Services
- Housing Deposits
- Housing Tenancy and Sustaining Services
- Short-Term Post-Hospitalization Housing
- Recuperative Care (Medical Respite)
- Respite Services
- Day Habilitation Programs
- Nursing Facility Transition/Diversion to Assisted Living Facilities such as Residential Care Facilities for the Elderly (RCFEs) and Adult Residential Facilities (ARFs)
- Community Transition Services/Nursing Facility Transition to a Home
- Personal Care and Homemaker Services
- Environmental Accessibility Adaptations (Home Modifications)
- Medically-Supportive Food/Meals/Medically Tailored Meals
- Sobering Centers

[Slide Image Description: This slide shows an image of the services and supports for CalAIM community supports page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

After SUD treatment services, we will focus on the CalAIM questions. We will go through the same structure.

Ming is at a Board and Care Home (B&C).

For **3.5.13 CalAIM Community Supports Provided**, let's select **"Nursing Facility Transition/Diversion to Assisted Living Facilities such as Residential Care Facilities for the Elderly (RCFEs) and Adult Residential Facilities (ARFs)"** and then click **"Next"**.

Now it asks for **3.5.14 CalAIM Community Supports in CARE Agreement/Plan**. Let select **"None"** and click **"Next"**.

It should skip to social services and supports. We will not have **3.5.15 CalAIM Community Supports in CARE Agreement/Plan Not Provided** and **3.5.16 Reason for CalAIM Community Supports Not Provided** because there is nothing on the CARE plan.

Live Demo: Social Services and Supports

- » 3.5.17 Social Services and Supports Provided
- » 3.5.18 Social Services and Supports in CARE Agreement/Plan
- » 3.5.19 Social Services and Supports in CARE Agreement/Plan Not Provided
- » 3.5.20 Reason for Social Services and Supports Not Provided

Services and Supports for Social Services and Supports

* 3.5.17: What social services and supports were provided to the client in the reporting month? (Check all that apply).

- Public Benefit - Supplemental Security Income/State Supplementary Payment (SSI/SSP)
- Public Benefit - Cash Assistance Program for Immigrants (CAPI)
- Public Benefit - CalWORKs
- Public Benefit - California Food Assistance Program
- Public Benefit - In-Home Supportive Services Program
- Public Benefit - CalFresh
- Other Service - Education and/or Employment Services
- Other Service - Family Education and Support Services
- Other Service - Benefits Advocacy Services (service professionals, family members, and friends who learn basic information about benefits programs to help people with disabilities)
- Unknown
- Other
-
- None

[Slide Image Description: This slide shows an image of the services and supports for social services and supports page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

After CalAIM, we will focus on the social services and supports questions.

We will start with **3.5.17 Social Services and Supports Provided**. Let's select **"Public Benefit - In-Home Supportive Services Program"** and **"Other Service - Education and/or Employment Services"** and then click **"Next"**.

Then, for **3.5.18 Social Services and Supports in CARE Agreement/Plan**, let's select **"Other Service - Education and/or Employment Services"** and click **"Next"**.

"Other Service - Education and/or Employment Services" is the only one on the CARE plan and it is not yet available to Ming.

On **3.5.19 Social Services and Supports in CARE Agreement/Plan Not Provided**, we will select **"Other Service - Education and/or Employment Services"** and then click **"Next"**.

Now we are directed to **3.5.20 Reason for Social Services and Supports Not Provided**.
We will select **“1-Not available”** and click **“Next”**.

Live Demo: Specialized Program

- » 3.5.21 Specialized Programs
 - 3.5.22 Full Service Partnership Program
 - 3.5.23 Reason for not engaging in Full Service Partnership

Services and Supports for Specialized Programs

* 3.5.21: Which of the following specialized programs was the client engaged in during the reporting month?

Full Service Partnership (FSP)

Assertive Community Treatment (ACT)

Forensic ACT (FACT)

Early Psychosis Intervention

Unknown

Other

If a client transitions from one program to another within the month, report the service enrolled at the end of the month (i.e., most recently enrolled service).

[Slide Image Description: This slide shows an image of the services and supports for specialized programs page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

The last set of questions are related to specialized programs.

If you take a quick look at the data flow chart, you will know that if **“Full Service Partnership (FSP)”** is selected for **3.5.21 Specialized Programs**, the survey will ask for **3.5.22 Full Service Partnership Program**.

IF **“Full Service Partnership (FSP)”** is not selected for **3.5.21 Specialized Programs**, the survey will ask for **3.5.23 Reason for not engaging in Full Service Partnership**.

On **3.5.21 Specialized Programs**, let’s select **“Forensic ACT (FACT)”** and click **“Next”**. Because we did not select FSP, we will be asked for **3.5.23 Reason for not engaging in Full Service Partnership**.

Let’s select **“1 – County FSP slots were full”** on **3.5.23 Reason for not engaging in Full Service Partnership** and click **“Next”**.



We should be done with 3.5 Services and Supports.

Live Demo: Housing Placements

- » 3.6.1 Housing Status/Living Situation
- » 3.6.2 Type of Housing Support

Housing Placements

* 3.6.1: What was the client's living situation in the reporting month?

- Homeless (or unhoused)
- Institutional
- Temporary
- Permanent
- Unknown
- Other

Housing status is defined as where the client spent the majority of their time. This data point will be collected as part of required demographic data and will also be tracked across time. Please see Appendix G for a specific definition for each living situation and DHCS Housing and Homelessness Incentive Program Measure 3.6 MCP members who remain successfully housed.

[Slide Image Description: This slide shows an image of the housing placements page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

We are now on the Housing Placements section. We will click “Next” to get to the questions.

Ming is living in the **Board and Care Home (B&C)** and **“The Behavioral Health Bridge Housing Program”** is paying for it.

We will select **“Institutional”** for **3.6.1 Housing Status/Living Situation** and **“The Behavioral Health Bridge Housing Program”** for **3.6.2 Type of Housing Support**.

After that, we will click **“Next”**. That's should be everything for Housing Placements.

Live Demo: Substance Use

- » 3.7.1 Diagnosed Substance Use Disorder
- » 3.7.2 Misuse of Illegal/Controlled Substances
- » 3.7.3 Primary Substance Use
- » 3.7.4 Primary Substance Frequency
- » 3.7.5 Secondary Substance Use
- » 3.7.6 Secondary Substance Frequency
 - 3.7.7 Alcohol Frequency

Substance Use

* 3.7.1: Does the client have a diagnosis of substance use disorder in the reporting month?

- Yes
- No
- Client declined to state
- Client unable to answer
- Unknown

* 3.7.2: Did the client misuse illegal or controlled substances in the reporting month?

- Yes
- No
- Client declined to state
- Client unable to answer
- Unknown

[Slide Image Description: This slide shows an image of the substance use page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

We should be on the Substance Use section. Click **“Next”** to get to the questions.

- 3.7.1 Diagnosed Substance Use Disorder
 - We will select **“Yes”**.
- 3.7.2 Misuse of Illegal/Controlled Substances
 - We will select **“Unknown”**.
- 3.7.3 Primary Substance Use
 - We will select **“Cocaine/Crack”**.
- 3.7.4 Primary Substance Frequency
 - Let’s assume that the client uses it daily.
 - We will select **“22 or more days per month”**.
- 3.7.5 Secondary Substance Use
 - We will select **“PCP”**.
- 3.7.6 Secondary Substance Frequency
 - Let’s assume that the client uses it once a month.

- We will select “**1 to 7 days per month**”.

Let’s click “**Next**”.

It should take us directly to **3.7.7 Alcohol Frequency**. From the additional specification in red and data flow chart, we know that we are required to report **3.7.7 Alcohol Frequency** because primary and second drugs are not Alcohol.

Let’s assume that we don’t have data for **3.7.7 Alcohol Frequency** . We will check “**Unknown**” and click “**Next**”.

That should be everything for Substance Use.

Live Demo: Detentions and other Lanterman-Petris-Short Act Involvement

- » 3.8.1 Detentions
- » 3.8.2 LPS Conservatorship

Detentions and other Lanterman-Petris-Short Act Involvement

* 3.8.1: Has the client been on an involuntary LPS hold in the reporting month? (Check all that apply)

- Yes, 72 Hours (LPS 5150 Hold)
- Yes, 14 Days (LPS 5250 Hold)
- Yes, 30 Days (LPS 5270 Hold)
- No
- Unknown

Count the hold that begins during the month. If the hold extends beyond the calendar month, do not count it again.

* 3.8.2: Has the client been placed in an LPS or Mental Health conservatorship (temporary or permanent) in the reporting month?

- Temporary Conservatorship for 30 Days
- Permanent Conservatorship for 12 Months
- No
- Unknown

[Slide Image Description: This slide shows an image of the detentions and other Lanterman-petris-short act involvement page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

After Substance Use, we should be on the Detentions and Lanterman-Petris-Short Act section. We will click “**Next**” to get to the questions.

In the reporting month, Ming has a 14 Days LPS hold and placed in a temporary conservatorship for 30 days.

For **3.8.1 Detentions**, we will select “**Yes, 14 Days (LPS 5250 Hold)**”.

And as for **3.8.2 LPS Conservatorship**, we will select “**Temporary Conservatorship for 30 Days**”.

That should be all for Detentions and LPS. We will click “**Next**”.

Live Demo: Criminal Justice

- » 3.9.1 Criminal Justice Status
- » 3.9.2 Number of Arrests
- » 3.9.3 Number of Jail Days
- » 3.9.4 Number of Prison Days
- » 3.9.5 Law Enforcement Contact

Criminal Justice

* 3.9.1: What was the client's criminal justice status in the reporting month? (Check all that apply)

- No criminal justice involvement
- Under parole supervision by CDCR (California Department of Correction & Rehabilitation)
- On parole from any other jurisdiction
- Post-release Community Supervision (AB 109) or on probation from any federal, state, or local jurisdiction
- Admitted under other diversion from any court under CA Penal Code, Section 1000
- Incarcerated
- Awaiting trial, charges or sentencing
- Client unable to answer
- Unknown

[Slide Image Description: This slide shows an image of the criminal justice page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

After Detentions and LPS, we will be on the Criminal Justice section. Click **“Next”** to get to the questions.

- **3.9.1 Criminal Justice Status**
 - We will select **“Awaiting trial, charges or sentencing”**.
- **3.9.2 Number of Arrests**
 - We will enter **“2”**.
- **3.9.3 Number of Jail Days**
 - Let’s assume that we don’t have this information. We will select **“Unknown”**.
- **3.9.4 Number of Prison Days**
 - We will enter **“0”**.
- **3.9.5 Law Enforcement Contact**
 - We will enter **“1”**.

That should be all the Criminal Justice questions. We will click “**Next**”.

Live Demo: Death and Causes of Death

- » 3.10.1 Deaths among participants
 - 3.10.2 Date of Death
 - 3.10.3 Cause of Death

Deaths among participants

* 3.10.1: Was the client reported as deceased in the reporting month?

- Yes
- No
- Unknown

Select "Unknown" for clients who are unable to be located during follow-up periods. Administrative data may be used if the client is no longer receiving county services at 1 year follow-up post CARE termination)

87%

Prev

Next

[Slide Image Description: This slide shows an image of the deaths among participants page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

After Criminal Justice, we will be on the Death and Causes of Death section. We will click **“Next”** to get to the questions.

We don’t have the data flow cart opened right now, but on that data flow chart, it tells us that we will be asked for the date and cause of death if the client has passed away.

Ming still alive and currently on the CARE plan.

On 3.10.1 Deaths among participants, clicking **“Yes”** will be directed to **Date of Death** and **Cause of Death**.

For Ming, we will select **“No”** and click **“Next”** to go to the next section. We should not be asked for Date of Death and Cause of Death.

Live Demo: Volunteer Supporters and PADs

- » 3.11.1 Volunteer Supporters
 - 3.11.2 Volunteer Supporter Relationship
 - 3.11.3 Reason for Volunteer Supporter Change
- » 3.11.4 Volunteer Supporter Presence
- » 3.11.5 Psychiatric Advance Directive
 - 3.11.6 Date of Psychiatric Advance Directive

Volunteer Supporters

* 3.11.1: Did the client elect, change, or remove a volunteer supporter in the reporting month?

- Yes
 No
 Unknown

Per W&I Code Section 5981 (a), the respondent may have a volunteer supporter present in any meeting, judicial proceeding, status hearing, or communication related to any of the following: (1) An evaluation. (2) Development of a CARE agreement or CARE plan. (3) Establishing a psychiatric advance directive. (4) Development of a graduation plan. A change in volunteer supporter will be captured in the value selected over time.



Prev Next

[Slide Image Description: This slide shows an image of the volunteer supporters page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

After Death and Causes of Death, we will be on the Volunteer Supporters and Psychiatric Advance Directives (PADs) section. We will click **“Next”** to begin.

On the data flow chart, it would tell us that if we answer **“Yes”** to **3.11.1 Volunteer Supporters**, we will be asked for **3.11.2 Volunteer Supporter Relationship** and **3.11.3 Reason for Volunteer Supporter Change**.

The same applies for **3.11.5 Psychiatric Advance Directive**. If we say **“Yes”** to PAD, we will be asked for **3.11.6 Date of Psychiatric Advance Directive**.

We will start with **3.11.1 Volunteer Supporters**. Ming has not had a supporter yet. We will select **“No”** and click **“Next”**.

It should take us to **3.11.4 Volunteer Supporter Presence**. We will select **“None”** since we have indicated that Ming does not have a supporter yet and click **“Next”**.

It should take us to **3.11.5 Psychiatric Advance Directive**. We will select “**Yes**” because Ming just established a PAD during the reporting month. Please note that we only answer “**Yes**” once for petition associated with a new case. We will click “**Next**”.

Because we select “**Yes**” for **3.11.5 Psychiatric Advance Directive**, we will be asked to provide **3.11.6 Date of Psychiatric Advance Directive**. Let’s enter a random date.

That should be all the questions. Click “**Next**”.

Live Demo: CARE Plan, CARE Agreement, and Graduation

- » 3.12.2 CARE Plan Ordered Date
- » 3.12.3 CARE Plan Completion Date
- » 3.12.4 One-Year Status Hearing
 - 3.12.5 Outcome of One-Year Status Hearing
 - 3.12.6 Graduation Plan

Care Plan

3.12.2: On what date was the CARE plan ordered by the court?

CARE Plan Ordered Date

Date
MM/DD/YYYY

MM – Two-digit month, must be a value from 01 through 12.
DD – Two-digit day, must be a value from 01 through 31 and a valid day for the month.
YYYY – Four-digit year, must be a value that is at least 2023.

Date the CARE plan was ordered by the court. This field will be available when "Active CARE plan" is selected for Current CARE Status. **Enter this date once for petitions associated with a new case.**

[Slide Image Description: This slide shows an image of the care plan page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

After Volunteer Supporters and PADs, we will be on the CARE Plan, CARE Agreement, and Graduation questions section. Click “**Next**” to get to the questions.

Ming is on the CARE plan, so we should only get questions related to the CARE plan.

We will get **3.12.2 CARE Plan Ordered Date** and **3.12.3 CARE Plan Completion Date**. We don’t get any question for CARE agreement or graduation status.

- **3.12.2 CARE Plan Ordered Date**
 - Let’s enter a random date.
- **3.12.3 CARE Plan Competition Date**
 - Let’s enter a random date.
 - Then click “**Next**”.
- **3.12.4: One-Year Status Hearing**
 - Ming has been on the CARE plan for almost a year and already has

- had the 1-Year Status Hearing.
 - We will select “Yes” and click “Next”.
- **3.12.5: Outcome of 1 Year Status Hearing**
 - Let select “Client elected to be graduated” and click “Next”.
- **3.12.6: Graduation Plan**
 - From data flow chart, we should be asked for Graduation Plan.
 - Let’s select “Yes” and click “Next”.

That should be all. We should be directed to our last section of the survey.

Live Demo: Hospitalizations and Emergency Department Visits

- » 3.13.1 Inpatient Hospitalizations
- » 3.13.2 Emergency Department Visits

Hospitalizations and Emergency Department Visits

* 3.13.1: How many times was the client admitted to an inpatient hospitalization stay in the reporting month?

- Client unable to answer
 Enter a value from 0 to 99:

Inpatient hospitalizations defined as the number of unique/separate admissions to a hospital for any reason (i.e., psychiatric hospitalization or hospitalization for a physical condition). Please do not include transfers from one facility to another as a unique admission.

* 3.13.2: How many emergency department visits (all cause) did the client have in the reporting month?

- Client unable to answer
 Enter a value from 0 to 99:

Count only discharge for emergency department visits; to avoid duplication of acute emergency department events, do not count emergency department visits that led to an inpatient hospitalization.

[Slide Image Description: This slide shows an image of the hospitalizations and emergency department visits page of the SurveyMonkey tool. A bullet point list of the data points included in the section is shown.]

We are now on our last section of the survey. Click **“Next”** to begin.

For **3.13.1 Inpatient Hospitalizations**, let’s enter **“6”**.

And for **3.13.2 Emergency Department Visits**, let’s enter **“4”**.

Again, from the specification for **3.13.2**, please don’t count ER visits that lead to an inpatient hospitalization.

That should be everything for the survey. Before clicking **“Done”**, please make any final edits because we will not be able to go back and edit the data for a client once the survey has been submitted.

Everything is good, so we will click **“Done”**.

Live Demo: Thank You

Thank you for completing the survey. If you need any technical assistance or need to edit the data for a client, please use the Request CARE Act Data Collection and Reporting Assistance form (https://docs.google.com/forms/d/e/1FAIpQLSeggKj1SJRZhY_OEBhHCYRFghyJL7P3uDR0SGpxF5tMOsv_pw/viewform) to submit the requests. A member of the data support team will respond as soon as possible.

Also, please do not forget to submit another survey if there is a change of CARE status.

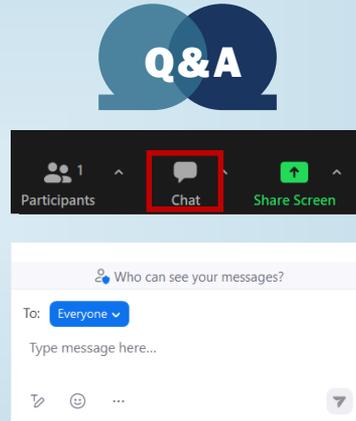
Done

[Slide Image Description: This slide shows an image of the ending thank you page of the SurveyMonkey tool.

After selecting “**Done**”, you will see a thank you screen. If you need any technical assistance or need to edit the data for a client, please copy and paste the link on the screen to submit a request for technical assistance. Click “**Done**” again to exit out of the survey or to start a new entry.

Please submit your questions via the chat

- » Locate the “Chat” feature in the meeting control bar
- » A “Meeting Chat” window will open on the right side of your Zoom screen
- » Click “Type message here” to enter your question
- » Click the arrow icon on the bottom right to submit



[Slide Image Description: This slide includes text that reads “please submit your questions via the chat” and an image of two Q&A thought bubbles.]

With that, we’ve reached the end of the survey and the end of the demo. I’ll now take a look at the chat and see what questions have been submitted. If you have any questions you’d like us to answer, please submit them now.

Objectives

At the end of the session, participants will have an increased ability to:

- › Identify county responsibilities for data submission
- › Describe the two options for submitting monthly data for CARE participants: SurveyMonkey and MOVEit
- › Understand the county data flow chart used to collect the required data points in SurveyMonkey
- › Enter data in SurveyMonkey using embedded logic to ensure collection of required data based on CARE Act statute

[Slide Image Description: This slide shows the learning objectives for this training with a light blue background.]

Thank you all for your time and attention today. As a reminder, we hoped that by the end of the session participants would have a increased ability to

- Identify county responsibilities for data submission
- Describe the two options for submitting monthly data for CARE participants: SurveyMonkey and MOVEit
- Understand the county data flow chart used to collect the required data points in SurveyMonkey
- Enter data in SurveyMonkey using embedded logic to ensure collection of required data based on CARE status

Next Steps

- » **COMING SOON:** MOVEit platform demo and information related to quality assurance checks of county behavioral health data
- » Please take the evaluation after this training
- » Email info@CARE-Act.org and share who should receive notice of TTA opportunities (county CARE program staff, data analyst, research managers, etc.). Include names, titles, and emails
- » Request Data Collection & Reporting TTA on the [CARE-Act.org](https://www.care-act.org) website using this [FORM](#)



[Slide Image Description: This slide shows bullets with next steps. It contains decorative arrows.]

There are a few next steps described here.

- Be on the lookout for an upcoming training and demo related to the MOVEit platform. HMA will also be releasing information related to quality assurance checks of county behavioral health agency data.
- You will be receiving a request to submit an evaluation survey related to this training. Your feedback will help improve future trainings.
- We will be sending out more information about training and technical assistance opportunities for CARE Act data collection and reporting soon and want to make sure our communications lists are complete. Those that should participate include CARE program staff, data analysts, research managers, and IT support. Please use info@CARE-Act.org to let us know who should receive notice of these TTA opportunities. Please include names, titles, and emails.
- The CARE Act Resource Center website at [Care-Act.org](https://www.care-act.org) has a TTA Request Form specific to data collection and reporting. To submit a request for assistance, click on the Contact dropdown and select Data Collection and Reporting Assistance. If you

jotted down questions today that we didn't get to, please submit them via this Data Collection and Reporting Assistance tab to help us tailor future trainings.

- The TA request form link will also be shared in chat:
https://docs.google.com/forms/d/e/1FAIpQLSeggKj1SJRZhY_OEBhHCYRFghyJL7P3uDROSGpxF5tMOsv_pw/viewform

Data Collection and Reporting Resources

Data Collection
FAQs

Data Dictionary
County Data
Flowchart

Data Dictionary
Summary Table

BHIN and Data
Dictionary

Data Quality
Assurance Checklist
Coming Soon!

[Slide image description: This slide shows five blue boxes that list the data collection and reporting resources.]

There are a variety of additional data collection and reporting resources available. The Quality Assurance Checklist will be used by counties to support data validation and accuracy prior to submitting their data and will be available soon.

- Link to Data Collection FAQs: <https://care-act.org/wp-content/uploads/2023/10/CARE-Act-Data-Frequently-Asked-Questions.pdf>
- Link to Data Flow Chart: https://care-act.org/wp-content/uploads/2023/09/Data-Dictionary-Resource_County-Data-Flow-Chart_9.26.23.pdf
- Link to Data Dictionary Summary Table: <https://www.dhcs.ca.gov/Documents/Enclosure-I-CARE-ACT-Data-Dictionary-Version-1-0.pdf#page=170>
- Link to Behavioral Health Information Notice (BHIN): <https://www.dhcs.ca.gov/Documents/BHIN-23-052-CARE-Act-Data-Collection-and-Reporting-Requirements-pdf.pdf>
- Link to Data Dictionary: <https://www.dhcs.ca.gov/Documents/Enclosure-I-CARE-ACT-Data-Dictionary-Version-1-0.pdf>

Questions?

[CARE-Act.org](https://www.care-act.org)



[Slide Image Description: This slide shows the CARE-act website and the email address.]

We are here to support you and provide you with those opportunities to connect and hear about implementing the CARE Act. The website is [CARE-Act.org](https://www.care-act.org)