



# **Unicare Report Request Form**

## **User's Guide**

*Revision 2.0*

## Revision History

Date	Change	Modified By	Version
9/23/09	Initial Release	Lek Taylor	1.0
11/9/09	Replaced Katherine Christian with Julie Sizelove as the DADS Request Approver.	Lek Taylor	2.0

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## Introduction

This document describes the online form and procedure for requesting a Unicare report from Behavioral Services Information System Department (BHS IS).

## Purpose

The purpose is to provide an on-line form and a formal procedure as an efficient channel for users to obtain data from UNICARE Pro-filer system.

## Benefits

Following are the benefits for having the form and the procedure:

- An on-line tool for user to create a clear report definition.
- An efficient method for users to accurately communicate report specifications to Mental Health (MH) , Drugs and Alcohol (DADS), or Health and Hospital Systems (HHS) admins for approval.
- The ability to effectively manage report requests and estimate turn-around time.
- The ability to collect the data for Report Reference Guide.

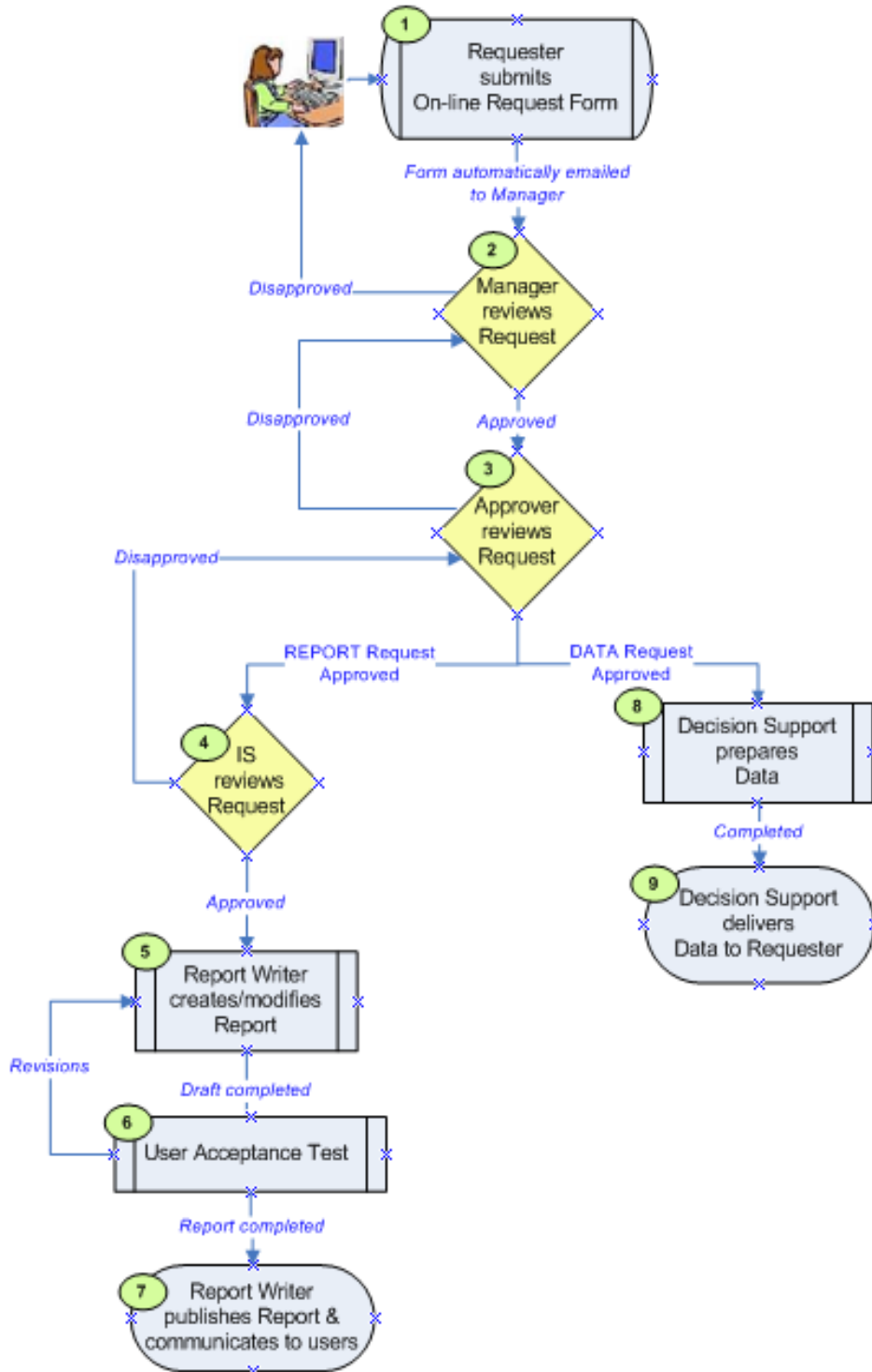
## The Form

The Unicare Report Request Form is available on BHS Unicare website, MH Department website, DADS Department website, and Valleypages. Users will complete and submit the form on-line. The request will be processed according to the procedure described in the next section of this document.

The screenshot shows the 'Unicare Report Request' form. It includes instructions, a date field, a 'New or Existing Report' section with radio buttons for 'New Report', 'Existing Report', and 'Data Only'. There are sections for 'Requestor Information' and 'Manager Information', each with fields for Name, Email, Phone, and Location. The 'Purpose and Brief Description of Report' section contains dropdown menus for 'Estimated Frequency of Use', 'Anticipated Number of Users', and 'This report needs data from:'. It also has a 'Purpose' text area with a note: '(For example: The report is intended to find clients that haven't had an appointment at a location for over 30 days, so they can be discharged. Be as detailed as possible)'. A 'Description' text area follows with a note: '(As detailed as possible. If a similar report exists to use as a beginning reference, please list the name and number of that report. Also list any other reports that are similar to this report and where data is or isn't used in the report)'. The 'Report Users' section has a 'General Provider Type' dropdown and a grid of checkboxes for 'Admin Research/Decision Support/CI', 'Clinicians', 'Call Center', 'Managers', 'Clerical', and 'Unicare SAT Team'.

# The Procedure

## Unicare Report Requesting Procedure



## Unicare Report Requesting Procedure

<p><b>1) Requester submits on-line request form.</b></p>	<p>a) The on-line request form contains the report definition which includes all required information. When submitted, the request is automatically emailed to the requester’s manager for approval. A copy is also emailed to the requester to acknowledge that it has been submitted successfully.</p>
<p><b>2) Requester’s manager reviews the request for approval.</b></p>	<p>a) Requester’s manager reviews the request to determine if the report will enhance user's productivity, is beneficial to a large group of users, etc.</p> <p>b) If approved, the form is emailed to either MH Approver<sup>1</sup> or DADS Approver<sup>2</sup> based on the type of request.</p> <p>c) If disapproved, the requester will be informed of the reasons for disapproving.</p>
<p><b>3) MH Approver or DADS Approver reviews the request for approval.</b></p> <p><b>For report request, go to step 4.</b></p> <p><b>For data request, go to step 8.</b></p>	<p>a) MH Approver/DADS Approver reviews the request to determine if it's useful and realistic, and may suggest a report to the requester if one already exists. . The Approver may also enhance or modify the request to make it useful to a larger number of users.</p> <p>For financial report requests, the Approver will forward them to either Martha Paine (MH) or Mel Whitlow (DADS) to review.</p> <p>b) If approved, the request is forwarded to BHS IS Manager along with priority information.</p> <p>c) If disapproved, the requester’s manager will be informed of the reasons for disapproving.</p> <p>Note: The Approver is expected to review and pass on the request as quickly as possible. The Approver should apply their reports knowledge at hand and should not hold up the request for further research (e.g. to determine if an existing report can be modified or a new report is needed, etc.). The Approver will work with IS report writing staff for further clarification of the requirements.</p>

<sup>1</sup> MH Approver is Hung Nguyen.

<sup>2</sup> DADS Approver is Julie Sizelove.

<b>Report Request</b>	<b>4) BHS IS Manager reviews the request for approval.</b>	<p>a) BHS IS Manager reviews the request.</p> <p>b) If approved, the request and the priority information will be forwarded to BHS IS report writing staff.</p> <p>c) If disapproved, the MH Approver/DADS Approver will be informed of the reasons for disapproving.</p>
	<b>5) Report writer reviews the request and creates or modifies the report.</b>	<p>a) Report Writer reviews the report requirements and discusses with the requester, MH Approver, or DADS Approvers if there are any questions, or if additional information is required to determine the best implementation approach (e.g. the most effective place to obtain the data, etc.). Report Writer also determines if there is an existing report that can be modified to satisfy the request or if a new report is needed.</p> <p>b) In some cases, the Report Writer may broaden the scope of the request to completely resolve the problem (e.g. modify all of the reports that have a similar problem, etc.).</p> <p>c) Report Writer creates/modifies report, tests, and validates the data.</p> <p>d) Report Writer communicates with requester and/or MH Approver/DADS Approver to resolve questions/issues as needed.</p> <p>e) Report Writer completes the first draft of the report and posts it in Pro-filer as work-in-progress.</p>
	<b>6) User Acceptance Test</b>	<p>a) Report Writer informs the requester, cc MH Approver/DADS Approver, that the report draft is ready for testing.</p> <p>b) Requester tests the report and provides feedback to the Report Writer, cc MH Approver/DADS Approver, who may also test and provide feedback to Report Writer at the same time.</p> <p>c) Report Writer modifies the report.</p> <p>d) Steps a to c are repeated until all requirements are met.</p>
	<b>7) Report writer publishes the</b>	<p>a) Report Writer posts the final version of the report, performs final testing in Pro-filer, and allows appropriate users access to the</p>

	<p><b>report in Pro-filer and make an announcement to the user community.</b></p> <p><i>Request is now completed.</i></p>	<p>report.</p> <p>b) Requester formally signs off the request via email.</p> <p>c) Report Writer creates final report definition from the information on the request form and any modifications to the requirements for distribution and for the Report Reference Guide (which will be available in the future).</p> <p>d) Report Writer sends an email, including the report definition, to the requester, the requester’s manager, the MH Approver/DADS Approver, and the Unicare SAT team to inform them that the report is now available. The Unicare SAT team coordinator will inform the appropriate user group(s) that the report is available.</p>
<p><b>Data Request</b></p>	<p><b>8) Decision Support prepares the data.</b></p>	<p>a) Decision Support prepares the data that is being requested.</p>
	<p><b>9) Decision Support delivers the data.</b></p> <p><i>Request is now completed.</i></p>	<p>a) Decision Support delivers the data to the requester.</p>

# How to Access the Form & Procedure

For Contractors:

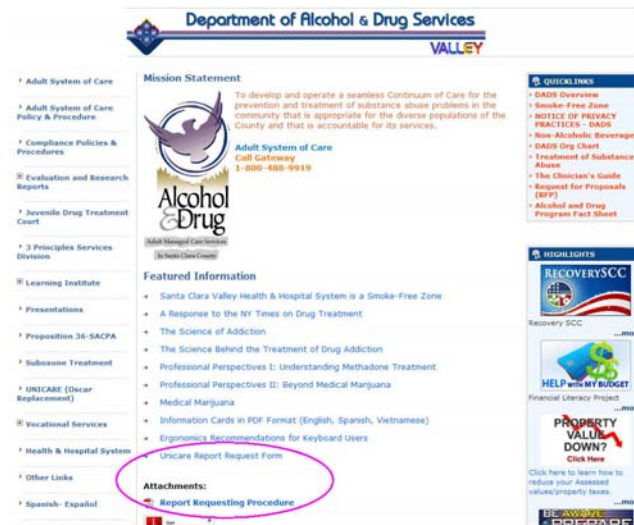
Mental Health Website:

<http://www.sccgov.org/portal/site/mhd/agencychp?path=%2Fv7%2FMental%20Health%20Services%20%28DEP%29%2FStaff%20%26%20Contractor%20Information>



Drugs and Alcohol Website:

<http://www.sccgov.org/portal/site/dads/>



For County users:

**BHS Unicare Website:**

<https://apps.sccbhs.hhs.co.santa-clara.ca.us/>

**Santa Clara Valley Health & Hospital Systems**  
Mental Health/Drug & Alcohol Services  
**Behavioral Health Systems**

**\*\*\* Unicare Update on Progress Note Font Size \*\*\***

The latest upgrade enlarged the progress note font size to 12 point. IS has received many help desk calls about this new feature. At this time the default font size is not able to be changed. You can highlight the progress note, and change it to your font/size before print. We appreciate your patience as we work with the vendor on possible solutions. -- Unicare Team

**\*\*\* Service Entry Deadline for FY09\*\*\*** The deadline for entering units of service to be included in the FY09 Short Doyle Medical cost report is September 30, 2009. Thank You.

**Reminder:** What: Unicare User's Group meeting:  
When: Sep. 11, 2009 (Friday)  
Time: Mental Health at 9:00 to 10:30 am  
Where: 2325 Enborg Lane, San Jose, 95128  
1st Floor Conference Room

\*\*\*\*\*

This system is for the use of authorized users only.  
**DISCLAIMER:** Unauthorized access, attempted access, or any unauthorized use of this computing system is a violation of Section 502 of the California Penal Code and applicable Federal Laws. Individuals using this system are subject to having all of their activities on this system monitored and recorded by system personnel. In the course of monitoring, individuals improperly using the system, or in the course of system maintenance, the activities of authorized users may also be monitored. Anyone using this system expressly consents to such monitoring and is advised that if such monitoring reveals possible evidence of criminal activity, system personnel may provide the evidence of such monitoring to law enforcement officials.

**Information**

- Billing - PC
- Billing - Thin Client
- User's Group
- Training - PC
- Training - Thin Client

**Updates**

- Mental Health Alcohol and Drug

**Resources**

- Help Desk - PC
- Help Desk - Thin Client
- Request Forms \*

**Other Links**

**ValleyPages:**

<http://www.sccgovatwork/portal/site/HHS/agencychp?path=%2Fv7%2FHHS%20%28EMP%29%29%2FForms%2FBehavioral%20Health%20Services>

**sccgov@work**  
Service, Community, Innovation

COUNTY OF SANTA CLARA

SEARCH GO

Working at SCC | Benefits | County Link

YOU ARE HERE: HHS (EMPLOYEES) > Forms > Behavioral Health Services

**Forms - Behavioral Health Services** Print this article | Email this article

To request a service from the Behavioral Health Services IS department, please fill out one of the following forms. For assistance, please contact the HHS IS Service Desk at 885-2300

- Unicare Report Request Form
- Report Requesting Procedure
- Unicare Home Care Request Form (November 2008)
- Unicare Confidentiality Form

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**we SCC**

- Login
- Register

**Quick Links**

- Occurrence Report
- Office Depot - Order Online
- Other HHS Intranets
- RDS and HHC Information
- Staff Directory
- HHS Campus Directory
- File Share
- Conference Room Schedules

**REGISTRATION**

Employee Wellness Newsletter

**CONNECTIONS**

## Technical Support

- Users will call or email IS Helpdesk if they have any problems accessing or using the form or the procedure.
- Helpdesk staff will troubleshoot the problem to identify the point of failure as normally done on all Helpdesk tickets.
  - If the link to the form or procedure is broken, please contact Sue Chou. Sue will work with Rafael Gameros who is responsible for maintaining the form and the links to the form if needed.
  - If the MH website is down, please contact Karen Roberts.
  - If that DADS website is down, please contact Charito Abordo.
  - As a temporary solution, you may email the link below to the user so he/she can submit the form. The form works regardless of the condition of the websites. The link to the procedure can be found in the Instruction section which is located at the top of the form.  
<https://eforms.sccgov.org/lfserver/UnicareReportRequestForm>
  - For questions on the procedure or form functionalities, please contact Lek Taylor or Douglas Klinkerman.

## Project Contacts

Topic	Contact	Phone#	E-mail
Request Forms link on BHS Unicare Website	Sue Chou	(408)-885-4564	<a href="mailto:Sue.Chou@hhs.sccgov.org">Sue.Chou@hhs.sccgov.org</a>
Form & Procedure links on MH Website	Karen Roberts	(408)-792 3908	<a href="mailto:Karen.Roberts@hhs.sccgov.org">Karen.Roberts@hhs.sccgov.org</a>
Form & Procedure links on DADS Website	Charito Abordo	(408)-885-3761	<a href="mailto:Charito.Abordo@hhs.sccgov.org">Charito.Abordo@hhs.sccgov.org</a>
Form maintenance, Publishing of Form & Procedure on SCVHHS Internet server, BHS Forms Page on Valley pages	Rafael Gameros	(408)- 885 7097	<a href="mailto:Rafael.Gameros@hhs.sccgov.org">Rafael.Gameros@hhs.sccgov.org</a>
Form functionalities, Procedure	Lek Taylor, Douglas Klinkerman	(408)-885-5365 (408)-885-4688	<a href="mailto:Lek.Taylor@hhs.sccgov.org">Lek.Taylor@hhs.sccgov.org</a> <a href="mailto:Douglas.Klinerman@hhs.sccgov.org">Douglas.Klinerman@hhs.sccgov.org</a>