

CCBHC-E National Training and  
Technical Assistance Center  
*CCBHC Data Foundations Learning Series*  
*Session 4*

February 20, 2024

**CCBHC-E National Training and Technical Assistance Center**

*Funded by Substance Abuse and Mental Health Services Administration and operated by the National Council for Mental Wellbeing*

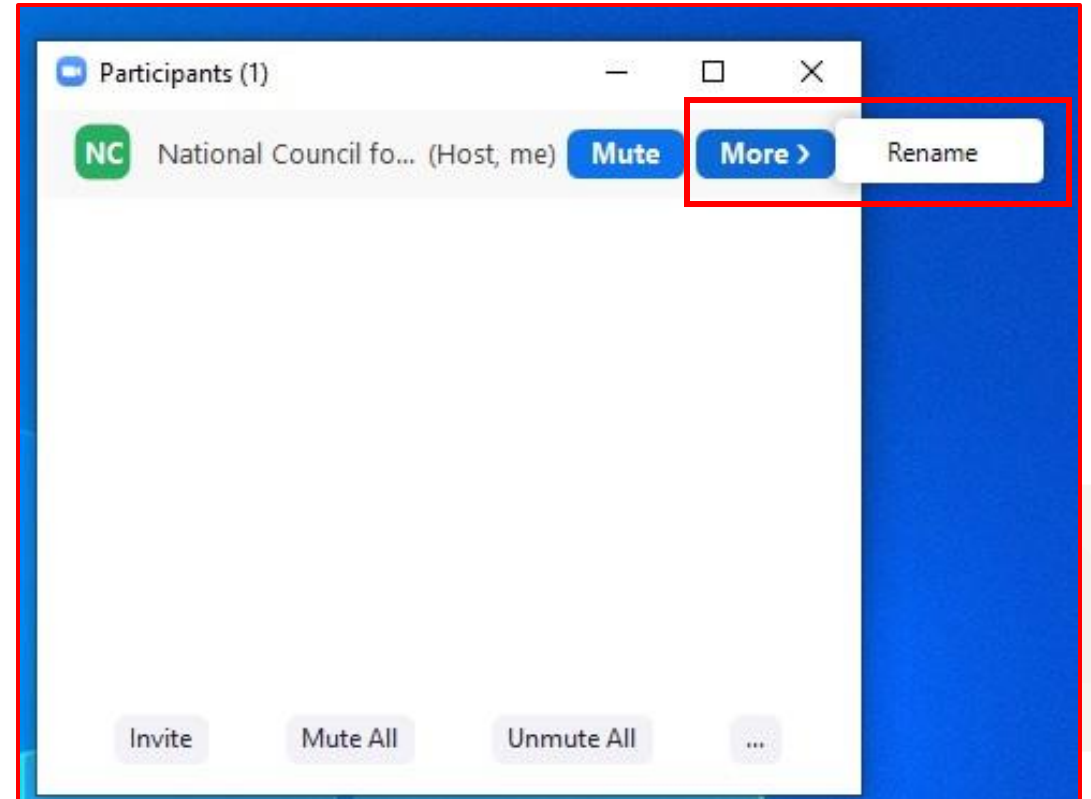
# Acknowledgements and Disclaimer

*This session was made possible by Grant Number 1H79SM085856 from the Substance Abuse and Mental Health Services Administration (SAMHSA). Its contents are solely the responsibility of the authors and do not necessarily represent the official views, opinions, or policies of SAMHSA, or the U.S. Department of Health and Human Services (HHS).*



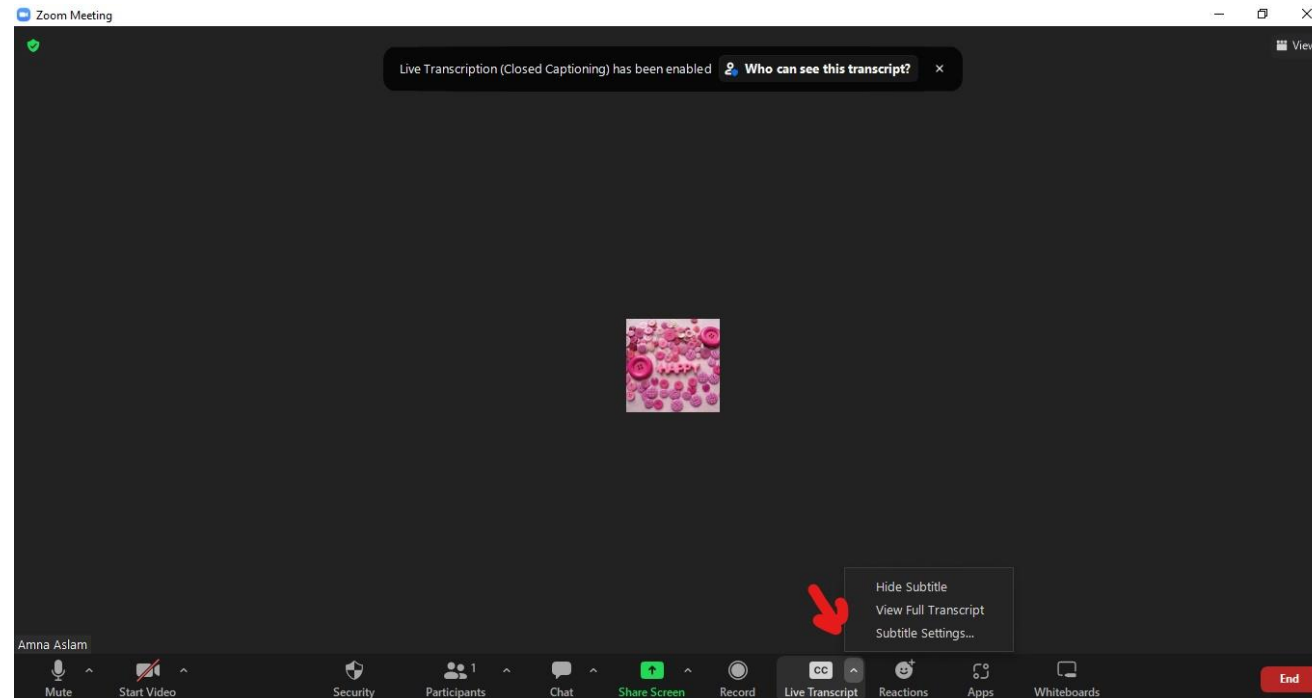
# Logistics

- Please rename yourself so your name includes your organization.
  - *For example:*
    - **Blaire Thomas, National Council**
  - *To rename yourself:*
    - Click on the **Participants** icon at the bottom of the screen
    - Find your name and hover your mouse over it
    - Click **Rename**
- If you are having any issues, please send a Zoom chat message to **Kathryn Catamura, National Council**



# How to Enable Closed Captions (Live Transcript)

Next to “Live Transcript,” click the arrow button for options on closed captioning and live transcript.



# Today's Session: Slides and Recording

Slides and the session recording link will be available on the [CCBHC-E NTTAC website](#) under “Training and Events” > “Past Events” within 2 business days.

The screenshot shows the website interface. On the left, a navigation menu titled "Training & Events" is highlighted with a red arrow. The menu items are: About Us, Resources, Training & Events (highlighted), Learning Communities, On-Demand Modules/Lessons, Learning and Action Series, and Request Training/Assistance. To the right, a "Calendar of Events" section is visible. It includes a search bar, "Start Date" and "End Date" fields with calendar icons, and a "Select Event" dropdown menu. The dropdown menu is open, showing "Future Events" (selected), "Future Events", "Past Events" (highlighted in blue), and "Apply". A red arrow points from the "Past Events" option in the dropdown to the "Training & Events" menu item.



# Today's Objectives

- Discuss strategies CCBHCs can explore to build effective infrastructure and workflow processes for NOMs data collection, analysis, and reporting
- Provide case examples to demonstrate how CCBHCs can collect, enter, and analyze NOMs data to improve performance and inform decision making



# Today's Agenda



- Building Infrastructure and Practices for NOMs Data Collection, Analysis, and Reporting
- Case Examples
- Questions and Answers



# Today's Presenters



Leigh Fischer, MPH  
Principal  
TriWest Group



Hailey Hyde-Robertson, MPH  
Senior Consultant  
TriWest Group



Eric Sagel  
Business Intelligence Report Developer  
North Range Behavioral Health



John Gavino, LCSW, BHWC  
Associate Chief Program Officer  
Family and Children's Services, Inc.



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# Learning Series Curriculum

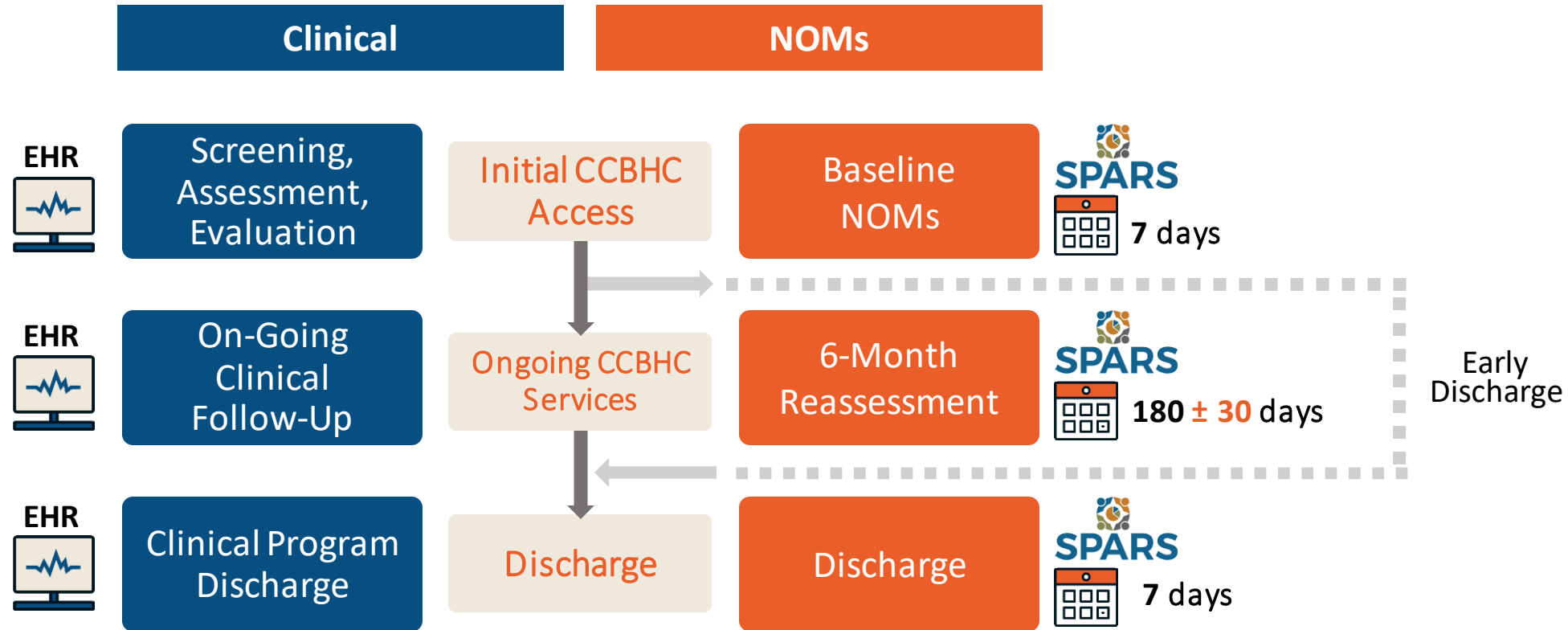
Month	Topic
Nov 2023	Building Infrastructure for Data Collection, Analysis, and Reporting
Dec 2023	Disparity Impact Statement & Data Requirements
Jan 2024	Community Needs Assessment
Feb 2024	Focus on NOMs
March 2024	Leveraging your Grant Evaluation for Sustainable Continuous Quality Improvement

# Session 4: Building Infrastructure for NOMs

- Establish your data team!
- Draft and test workflows for NOMs data collection
  - Randomization
  - Baseline
  - Reassessment
  - Discharge
- Determine roles and responsibilities, and train staff using SPARS resources
  - Data collection and prep
  - SPARS entry
- Develop processes for monitoring
- Report and share results

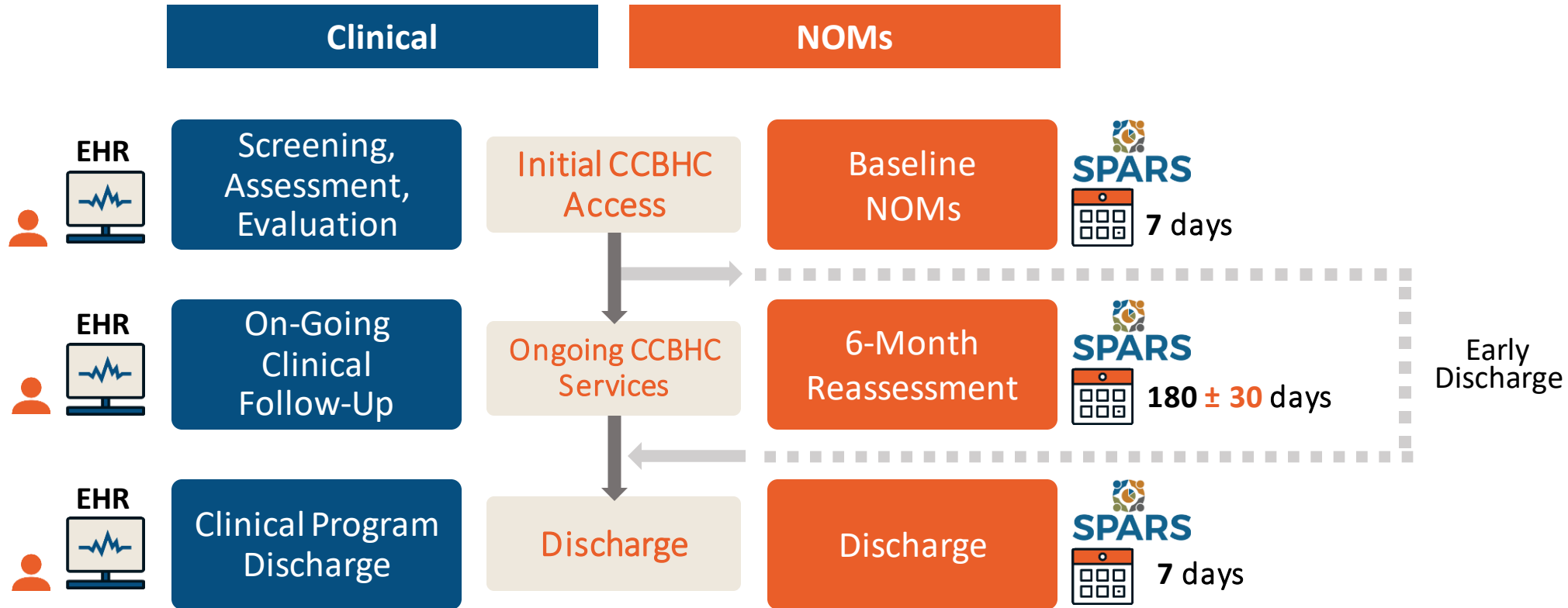


# NOMs Collection and Clinical Workflow Example



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# NOMs Collection and Clinical Workflow Example

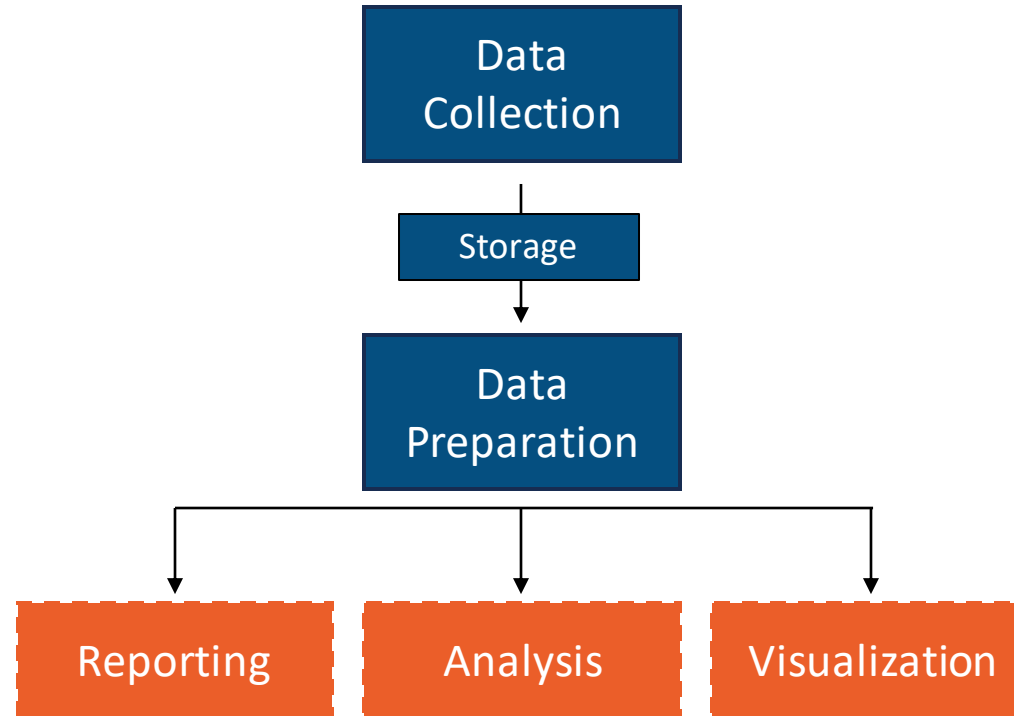


Examples of team members who can administer NOMs

Admin Support    
 Evaluator    
 Clinician    
 RSS/Care Coordinator

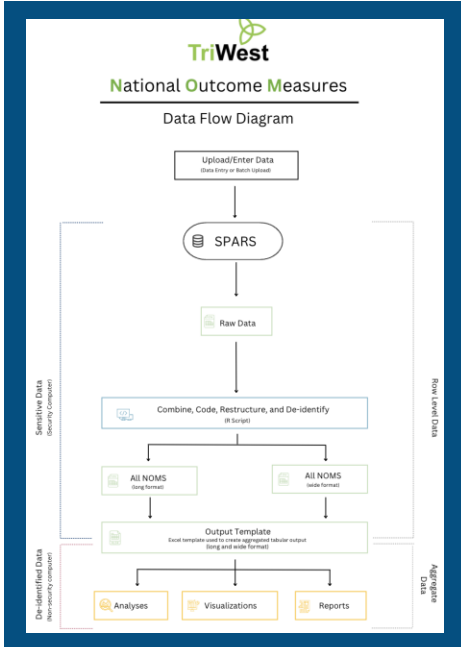
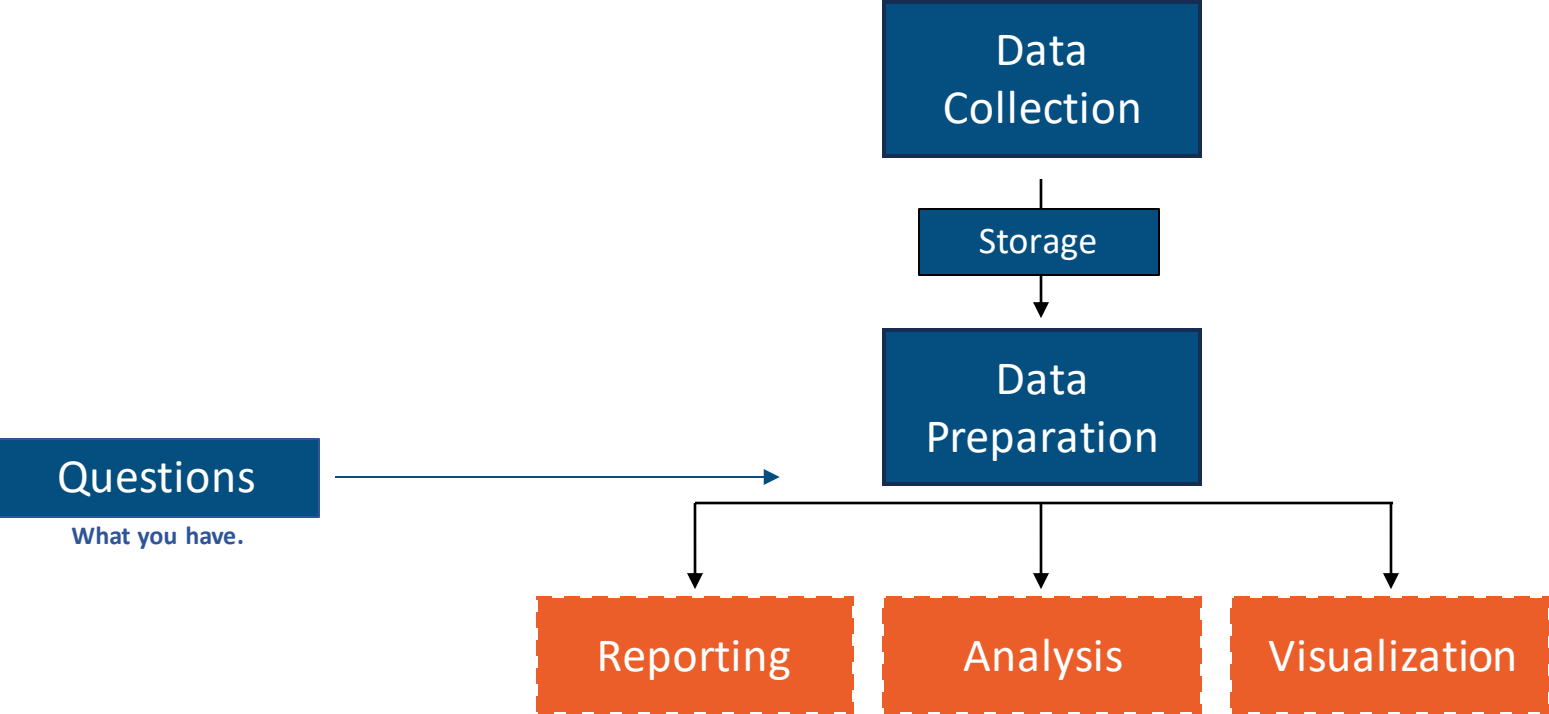


# Reporting and Sharing Results



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# Reporting and Sharing Results

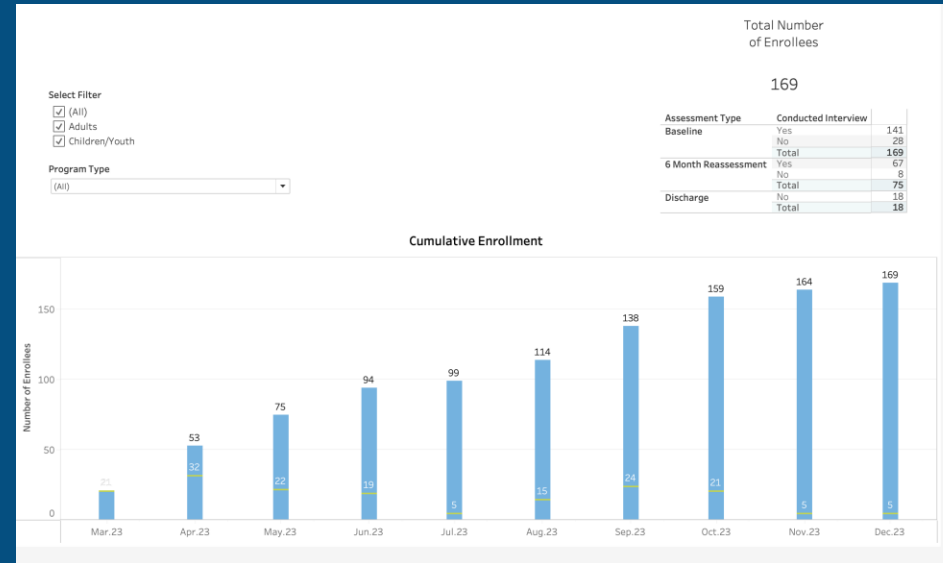
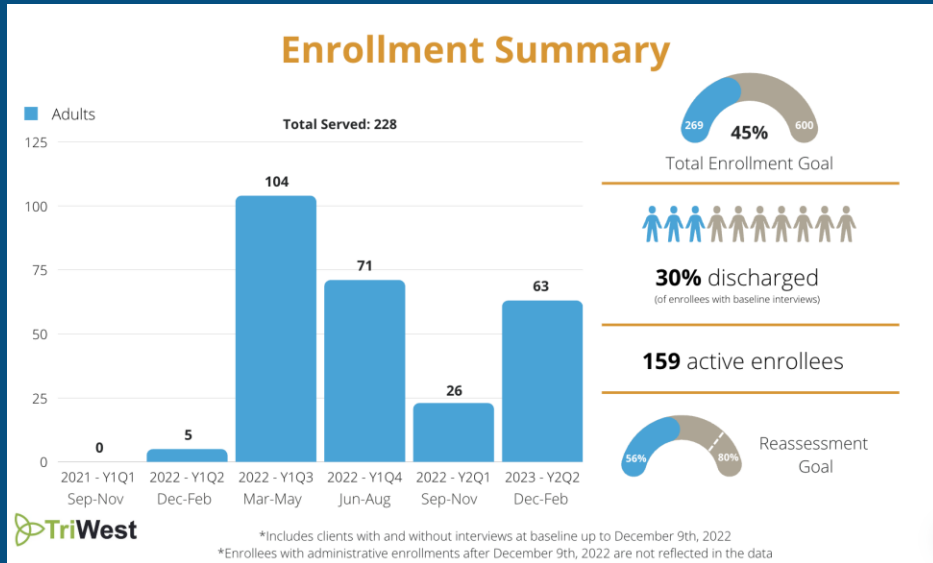


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# Reporting and Sharing Results



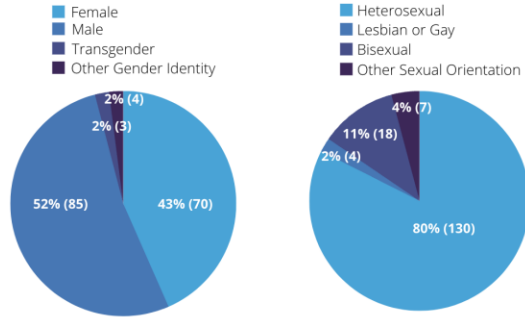
# Reporting and Sharing Results





## Demographics

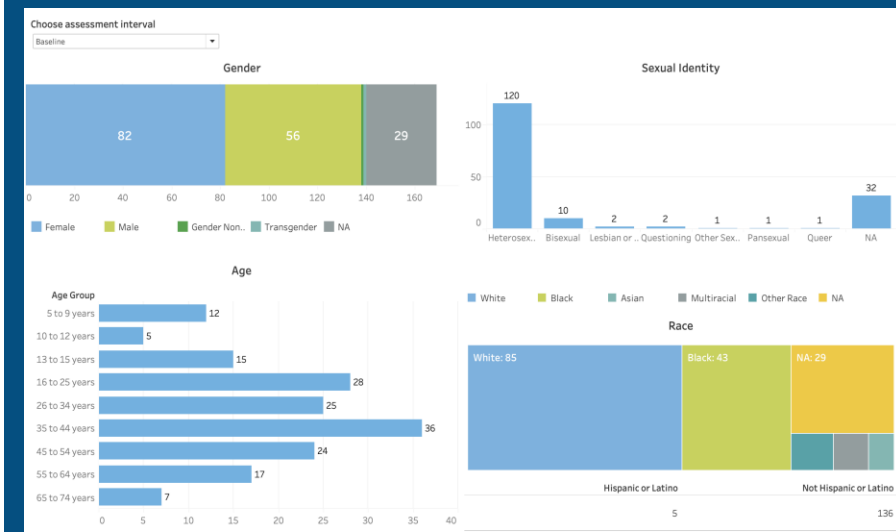
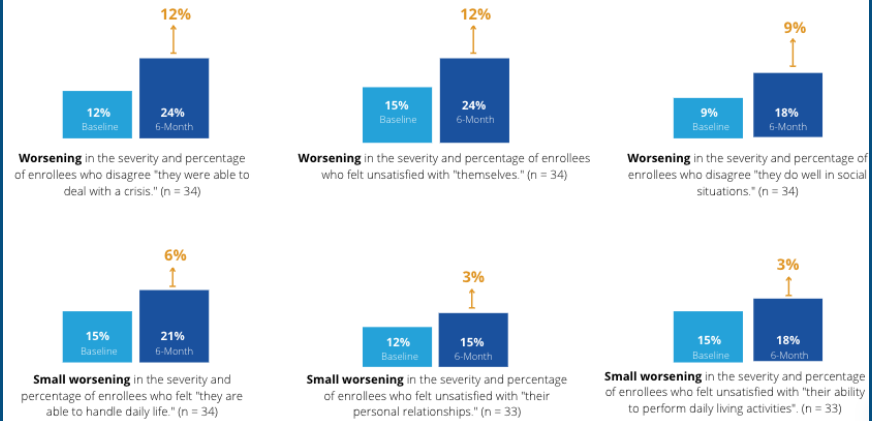
### Gender Identity and Sexual Orientation



Jones, J. M. (2022, February 17). LGBT Identification in U.S. Ticks Up to 7.1%. Gallup

## Preliminary Outcomes At Six-Months

### Individual Self-Reported Functioning and Wellness Items with the Least/No Improvement





## Case Example: Prepping and Uploading NOMs Data

# About North Range Behavioral Health

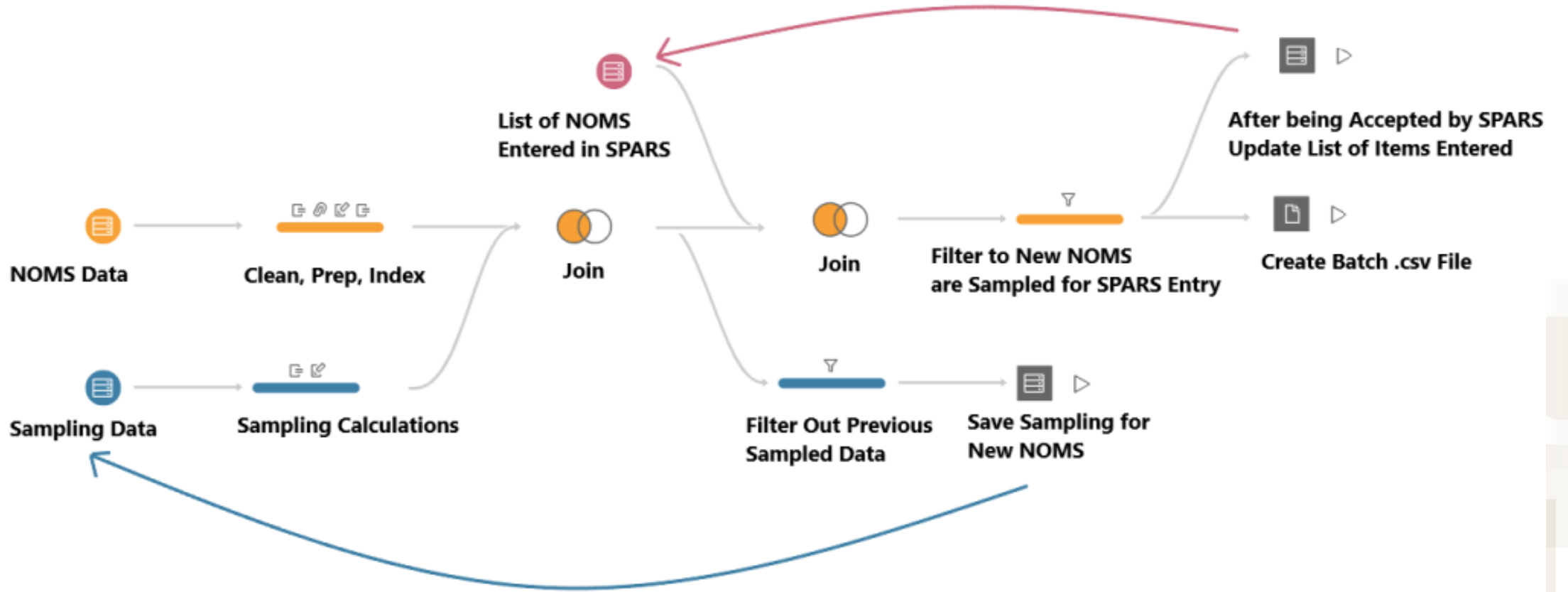
- Community Mental Health Center for Weld County, Colorado
- Established as a 501c3 in 1971
- Certified Community Behavioral Health Clinic (CCBHC) designation
- 23 locations, 565 team members



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# Overview



# Interview Process

**Access Team**

**Clients 8 years and above w/out legal involvement  
or specific programmatic needs**

**NOMS Assessment, Initial Clinical Assessment,  
Diagnosis, and Colorado State reporting tools**

**Access Team tracks Reassessments, Discharges,  
and Engagement**

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# Sampling Process

**Create Index of NOMS**

**Reduce Index to Single Digit 0-9**

**A Baseline with Index 0 is sampled for entry into SPARS = True**

**A Reassessment or Discharge that comes after an index 0 Baseline = True**



# Batch Process

**Convert NOMS data to SPARS format**

**Filter to only NOMS marked as True in Sampling**

**Export into Excel and upload into SPARS**

**After accepted by SPARS update list of entered NOMS**



# Resources

- CMHS NOMs CSV Upload template
- CMHS NOMS Client-Level Measures Codebook
- <https://spars.samhsa.gov/resources>





# Contact Information

Eric Sagel

Business Intelligence Report Developer

[Eric.Sagel@NorthRange.org](mailto:Eric.Sagel@NorthRange.org)

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Case Example:  
NOMs Data  
Infrastructure



Family &  
Children's  
SERVICES

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*Life Changing.*

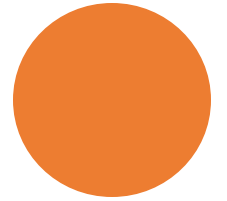


# National Outcome Measures

- Data Specialist -Role
- Tracking Spreadsheet
- NOMs Consent Form
- NOMs Entry
- Emails
- Placeholders
- Outreach Text Messages
- Tracking of Reassessment Rates
- Discharge Reports
- Data Meetings

# Data Specialist

- Effectively monitors, administers, and tracks all NOMs and data collection tools and assessments.
- Schedules clients for data collection, report out to staff data due dates and data entry into SPARS.
- Position will communicate program outcomes and trends to supervisor, program Evaluator, and team for effective data driven decision making.



# Tracking Spreadsheets

- Spreadsheet for Staff
  - Dates of eligibility for NOMS
  - Uploaded on Team SharePoint Site

SPARS	patid	client_name	Admitting_Clinician	Baseline_Da	Reassessme	Earliest Date of Eligibili	Due Date	Latest Date of Eligibili	Next_Appt	Cell_Phone
5000	123	Test Client 1	Staff 1	1/31/2022	6th-month	6/30/2022	7/31/2022	8/31/2022	7/9/2022	123-456-7890
5001	456	Test Client 2	Staff 2	2/2/2022	6th-month	7/2/2022	8/2/2022	9/2/2022	7/20/2022	456-7890-123
5002	789	Test Client 3	Staff 3	2/8/2022	6th-month	7/8/2022	8/8/2022	9/8/2022	7/11/2022	789-123-4567

- Spreadsheet for Data Specialist
  - Data entry into SPARS

SPARS ID	FCS Pat_ID	First Name	Last Name	Date of SPARS Intal	SPARS Intake Entered Initi	Intake SPARS enter	Discharge De	6 - Month Initials	6-m SPARS entered
5000	123	Test	Client 1	1/31/2022	SW	1/31/2022	12/2/2022	SK	7/15/2022
5001	456	Test	Client 2	2/2/2022	SW	2/2/2022		SK	8/1/2022
5002	789	Test	Client 3	2/8/2022	SW	2/8/2022	5/1/2022		



# NOMs Consent

Chart SAMHSA Survey Client Consent

**Survey Client Consent**  
English  
Spanish

Submit

Consent Date / Fecha de Consentimiento  
Language / Idioma  
English Spanish  
Evaluator / Evaluador  
Tara Saylor Tri West and Healthy Minds Policy Initiative  
Phone / Teléfono:

**English**

**Purpose and Benefits:**  
Family & Children's Services is offering you a program that focuses on your medical and psychiatric care. The study will look at ways the services help you and other people in the community. The study will look at the services you receive and how you are doing. The results of the study will help Family & Children's Services inform and improve our services to give the best help possible to you and other people. The results of the study will be shared with the Substance Abuse and Mental Health Services Administration (SAMHSA); they use the data from this study to determine how best to direct governmental funding to mental health programs.

**Procedures:**  
You will get the services you need whether or not you participate in this study. Even if you say that you want to be in the study now, you can stop being in study at any time. There are many services available. Some are intensive, some are less intensive. As your needs change, different services will be available. If you agree to be in the study, we will look at some information from your clinical record. This information will be kept at Family & Children's Services. We may also look at other computer and paper records they keep. These will tell us about the types of help you have received. They will also tell us how you are doing. We may also ask the people who are helping you to answer questions about you. We will also ask you to provide information on how you are doing and how you think Family & Children's Services is helping you. Also, your clinician or one of our study interviewers will contact you six months from now for a reassessment to measure your progress.  
We will group your answers with answers of other people in the study. This will let us see how Family & Children's Services is doing as it tries to help. We also try to learn how they can do better in the future.

**Risks, Stress, or Discomfort:**  
You may feel that some questions are very personal. Giving samples and information will also take some time and effort. In order to take less of your time, we are asking for your permission to let Family & Children's Services share what they know about you. This will let people on the evaluation team see some of your private information.

**Other Information:**  
We will keep your study information confidential. We will do this within the limits of the law. Some information will be from your clinical record and some from surveys. Only the people helping you and the researchers will have access to this information. The name of the lead researcher is listed on the top of this form. We will keep the information we collect about you in a safe place. We will destroy all information that could identify you. We will do this no more than two years after the study ends.  
There are some times when confidentiality must be broken. For example, we must tell the authorities if we suspect that someone might hurt himself or herself or someone else.  
If you have questions about this study, you may ask them now or contact the researchers later at a number listed on the top of this form. If you have questions about your rights as a study participant, you may also call. If you need help contacting the researcher, your Case Manager will help you.

**Participant's Statement:**  
"I have read this form and understand it. I was able to ask questions, and my questions were answered. The study has been explained to me, and I want to be in it. I know I can refuse to answer any question or stop being in the study at any time and continue receiving services. I know I can ask questions about the study at any time."

**Spanish**

**Propósito y beneficios** Family & Children's Services le ofrece un programa centrado en su atención médica y psiquiátrica. El estudio analizará las formas en que estos servicios lo ayudan a usted y a otras personas en la comunidad. Analizará los servicios que recibe y cómo los recibe. Los resultados del estudio ayudarán a Family & Children's Services a mejorar y ofrecer mejores servicios a los clientes. Los datos de este estudio serán compartidos con la Administración de Servicios de Salud Mental y Abuso de Sustancias (SAMHSA); ellos usan los datos de este estudio para determinar la mejor manera posible de dirigir el financiamiento gubernamental a los programas de salud mental.

# NOMs Entry

Chart NOMs Entry

**Records Management**

- Behavioral Health Diagn...
- Demographic Data
- A. Functioning
- B. Stability in Housing
- C. Education and Emplo...
- D. Crime and Criminal J...
- E. Perception of Care
- F. Social Connectedness
- G8. CCBHC Program-Spe...
- H. Services Received an...

**RECORD MANAGEMENT** information is collected by grantee staff at **BASELINE, REASSESSMENT, and CLINICAL DISCHARGE**, even w/ an assessment interview is not conducted.

Assessment Date

Client ID

Grant ID

Site ID

1. Indicate Assessment Type

Baseline Assessment

Reassessment

Clinical Discharge Assessment

1a. [IF QUESTION 1 IS BASELINE] Enter the MONTH and YEAR when the client first received services under this grant for this episode of care.

02/01/2019

1b. Which Reassessment Month?

3-month  6-month

2. What is the client's month and year of birth?

01/01/1970

3. Was the assessment interview conducted?

Yes  No

3a. [IF QUESTION 3 IS YES] When?

3b. [IF QUESTION 3 IS NO] Why not? Choose only one.

Not able to obtain consent from proxy

Client was impaired or unable to provide consent

Client refused this interview

Client was not reached for interview


Client refused all interviews

4. [CHILD ONLY] Was the respondent the child or caregiver?

Child  Caregiver

Submit




# Emails

 Send

To [SAMHSA CCBHC Enrollment](#)

Cc

Subject Test Client 12345 - Baseline NOMS

-  NOMS 2 MB
-  Workflow 290 KB
-  OHCA 136 KB

Send as Adobe Document Cloud link

Test Client 12345|

Client is now admitted into Bridge and consented to all forms but refused survey. Consent forms are in Avatar.

Client's comprehensive care plan is **active**.

Client **does** have Medicaid.

Client is **not** eligible for field-based services.

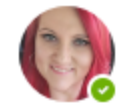
Client's CM needs are: **medication management, housing, food**

Client scheduled with **Medication Clinic Prescriber** on **2/7/2023 at 12:30pm in Office**

Case Manager – **Staff 1** – Next appointment on **2/7/23 11:30am in Office**

Client is scheduled with **Nurse Staff** for nursing assessment on **2/9/2023, 1:00 pm Telehealth**

Baseline NOMs cl # 12345 Spars 123



Lisa Walizer  
To ● John Gavino

Baseline entered in Avatar and Spars.

*Lisa Walizer RSS*

**Mental Health- Lead Data Specialist/Data and Systems Admin  
Pathways to Care**

Family & Children's Services, Inc.  
2325 S Harvard Ave.  
Tulsa, Ok. 74114





# More Emails: Reminders to Staff

## REASSESSMENTS DUE



Brenda Wooten

To  Carlos Meeks

Cc  John Gavino;  Wakeelah Adelegan;  Ashleigh Means

Retention Policy Never Delete Anything (Never)

Expires Never

### PLACEHOLDERS:

**ROBERT:** Test Client 1; 6MO  
Test Client 2; 6MO **\*\*SPARS LOCK 9/2/22\*\***

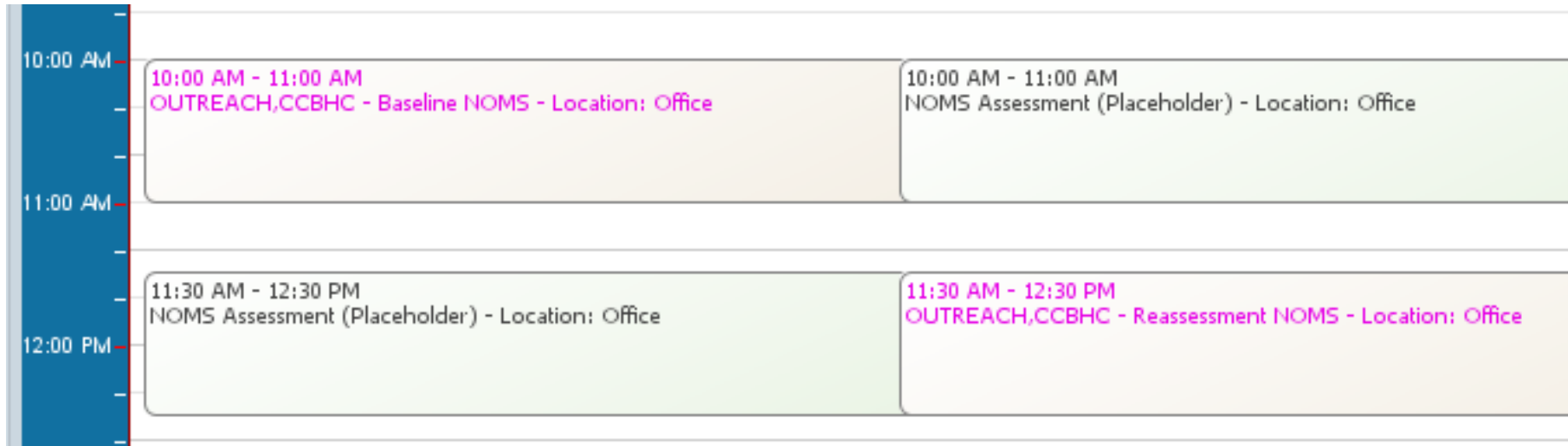
**KANDRA:** Test Client 3; 6MO

**LAUREN:** Test Client 4; 6MO |

SPARS	patid	client_name	Admitting_Clinician	Baseline_Da	Reassessme	Earliest Date of Eligibili	Due Date	Latest Date of Eligibili	Next_Appt	Cell_Phone
5000	123	Test Client 1	Staff 1	1/31/2022	6th-month	6/30/2022	7/31/2022	8/31/2022	8/25/2022	123-456-7890
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5002	789	Test Client 3	Staff 3	2/8/2022	6th-month	7/8/2022	8/8/2022	9/8/2022		789-123-4567

# Placeholders

- Placeholders go over scheduled appointments
  - Notifies Staff on baselines, reassessments, and discharges



# Outreach Text Messages

- Text messages get better responses than voicemails

The screenshot displays a text messaging application interface. At the top, it says "Messenger" with "Total: 791" and buttons for "New Message" and "Settings". Below this is a search bar with "Search" and "Date" filters. The main area is split into two panes: a list of messages on the left and a detailed view of a conversation on the right.

**Message List (Left Pane):**

Message Content	Date	Time
Angie Tucker marked messages as read.	02/02/2023	10:12 AM
Angie Tucker marked messages as read.	02/02/2023	10:12 AM
\$30 QT Card here at Family & Children's services. You are eligible for a \$30 Quick Trip Card if y...	02/01/2023	10:17 AM
! \$30 QT Card here at Family & Children's services. You are eligible for a \$30 Quick Trip Card if y...	01/31/2023	10:18 AM
Good morning! This is Family & Children's Services letting you know that your appt today will be by telephon...	01/31/2023	09:04 AM
Angie Tucker marked messages as read.	01/30/2023	01:09 PM
Angie Tucker marked messages as read.	01/30/2023	12:40 PM

**Activity View (Right Pane):**

**Activity** Mark as Unread

- Family & Children's Services** via Sara Kerns · 01/24/2023 12:57 PM  
! \$30 QT Card here at Family & Children's services. You are eligible for a \$30 Quick Trip Card if you complete your 6-month assessment over the phone. Please reply "Y" back to this message and I will get you scheduled. Or call your case manager Payton @ 539-777-5456 Thank you!!
- [User] · 02/01/2023 12:24 PM  
Y
- Family & Children's Services** via Angie Tucker · 02/01/2023 12:27 PM  
Good afternoon! what days and times are good for you?
- [User] · 02/01/2023 12:28 PM  
Any day Monday through Friday and any time 9am - 5pm
- [User] · 02/01/2023 12:28 PM  
Can we do one now or today
- Family & Children's Services** via Angie Tucker · 02/01/2023 12:42 PM  
Yes. my name is Angie and I can call you at 2:30.
- [User] · 02/01/2023 12:43 PM  
Ok
- Angie Tucker marked messages as read. 02/02/2023 10:12 AM

# SPARS Entry

## Interviews for 5001

				Assessment	Interview Date	Updated Date	Conducted?
View	Edit	Del	Print	Baseline Assessment	1/31/2022	01/31/2022	Yes
View	Edit	Del	Print	6-Month Reassessment	8/24/2022	08/24/2022	Yes
View	Edit	Del	Print	Clinical Discharge	12/2/2022	12/06/2022	Yes



# Tracking Reassessment Rates

- Frequent monitoring of reassessment rates

Cohort	Grant ID	Grant Org Info	GPO	Grantee has set Services goals for FFY 2022 & all future years <sup>2,3</sup>	Grantee has served at least 70% of Services goal for FFY 2022 <sup>2,4,5</sup>	Grantee reassessment rate is at least 60.0% in 2022 <sup>2,6,11</sup>
CCBHC-E 03	SM83179	Family and Children's Services Oklahoma - OK 05/01/2020-04/30/2022	Mary Blake	Yes	Yes Achieved: 1,097% Prorated Goal: 82	Yes 61%
CCBHC-E -C03	SM83179 C	Family and Children's Services Oklahoma - OK 05/01/2020-04/30/2022	Mary Blake	Yes	Yes Achieved: 282% Prorated Goal: 6	Yes 89%

Cohort	Grant ID	Grant Org Info	GPO	Grantee has served at least 70% of Services goal for FFY 2023 <sup>2,4,5</sup>	Grantee reassessment rate is at least 60.0% in 2023 <sup>2,6,11</sup>
CMHC-01	SM85451	Family and Children's Services Oklahoma - OK 09/30/2021-02/29/2024	Andrea Ratliff	Yes Achieved: 360% Goal: 499	Yes 78%

Program	Cohort	Grant ID	Grant Org Info	GPO	Grantee has set Services goals for FFY 2024 & all future years <sup>2,3</sup>	Grantee has served at least 70% of Services goal for FFY 2024 <sup>2,4,5</sup>	Grantee reassessment rate is at least 60.0% in 2024 <sup>2,6,11</sup>
CCBHC-E -IA	CCBHC-E -IA-01	SM86405	FAMILY AND CHILDREN'S SERVICES, INC. - OK 09/30/2022-09/29/2026	Kate Schlatter	Yes	Yes Achieved: 634% Prorated Goal: 61	Yes 90%



# Discharge Reports

- Tracking your client discharges is essential to monitor client activity and to keep your reassessment rates manageable.



# Data Meetings

- Leadership Data Meetings
- Team Data Meetings
- Meetings with Evaluator
- Meetings with BI Team/EHR
- Supervision and Data Team



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# Thank You and Questions



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# Closing: Sharing and Preparing



- **Volunteers:** What did you hear from others in terms of questions and ideas?
- **Question Log:** Take 2–3 minutes to put any questions you have about the learning series curriculum in the chat



# Final Session

- [Session 5: Leveraging Your Grant Evaluation for Sustainable Continuous Quality Improvement](#) - March 19, 3-4:30 p.m. ET



# Thank You!





Thank you for attending today's event.


Slides and the session recording link will be available on the CCBHC-E NTTAC website under "Training and Events" > "Past Events" within 2 business days.

Your feedback is important to us!

Please complete the brief event survey that will open in a new browser window at the end of this meeting. Your input helps us improve our support offerings and meet our SAMHSA data metrics.

## Calendar of Events

Search  Start Date  End Date  Select Event 

Future Events   
Future Events  
Past Events  
Apply

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