CHESS Dashboard User Guide
Michigan Recovery Incentives Pilot
For Providers and State Stakeholders

Contents

Purpose of this Document

The purpose of this User Guide is to provide step-by-step instructions on how to navigate and utilize the CHESS Dashboard effectively. This guide is designed to help end users understand key features, functionalities, and workflows within the Dashboard to maximize its benefits. Please note that all patient data displayed in this guide is for demonstration purposes only and represents test data. No real patient information is included in this guide.

Access the CHESS Dashboard via MiLogin

Sign into MiLogin with your credentials from the State. Once in MiLogin, click on Incentive Manager Vender for Recovery Incentives, then click the "Terms and Conditions" box and you will be taken to the homepage of the CHESS Dashboard.

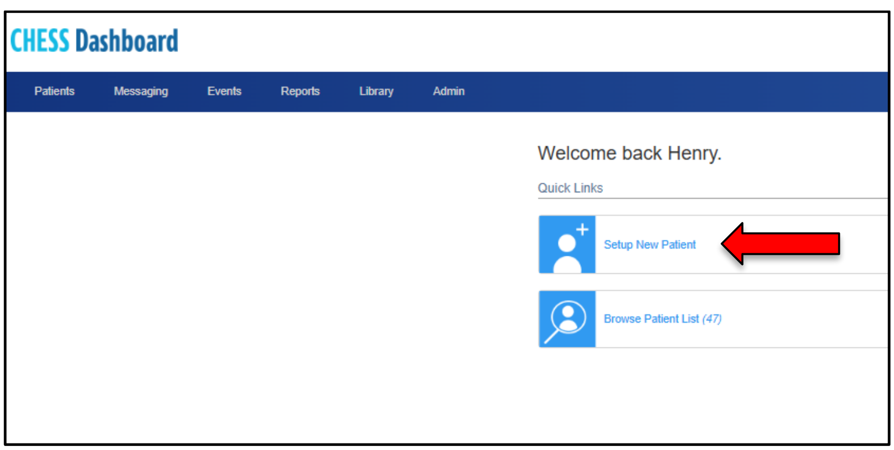
The CHESS Dashboard/IM Platform is a web-based application for staff/providers. This is where Patients are enrolled in the Rewards Incentive (RI) Pilot and where events (UDT appointments) are created and then updated to trigger reward distribution.

Please note that from time-to-time CHESS Health updates the Dashboard. To ensure you are utilizing the latest version, please refresh your account regularly. You do this by pressing Ctrl+Shift+R all at once.

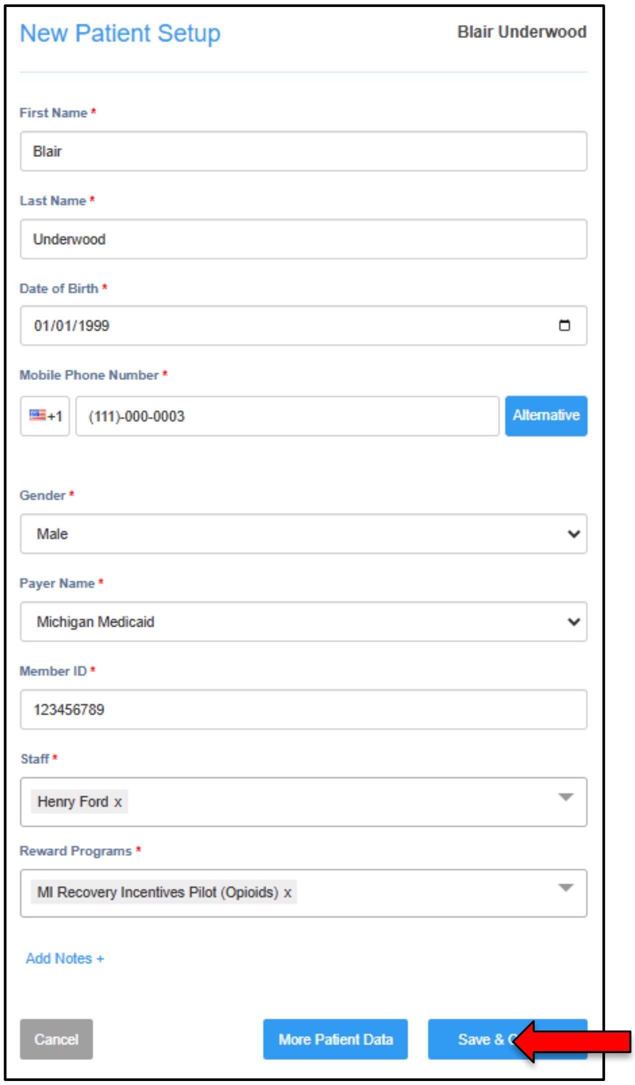
Enroll a New Patient

Upon successful login to CHESS Dashboard, the Home Page displays.

Click **Setup New Patient** to begin enrolling a new Patient.



The New Patient Setup form displays:

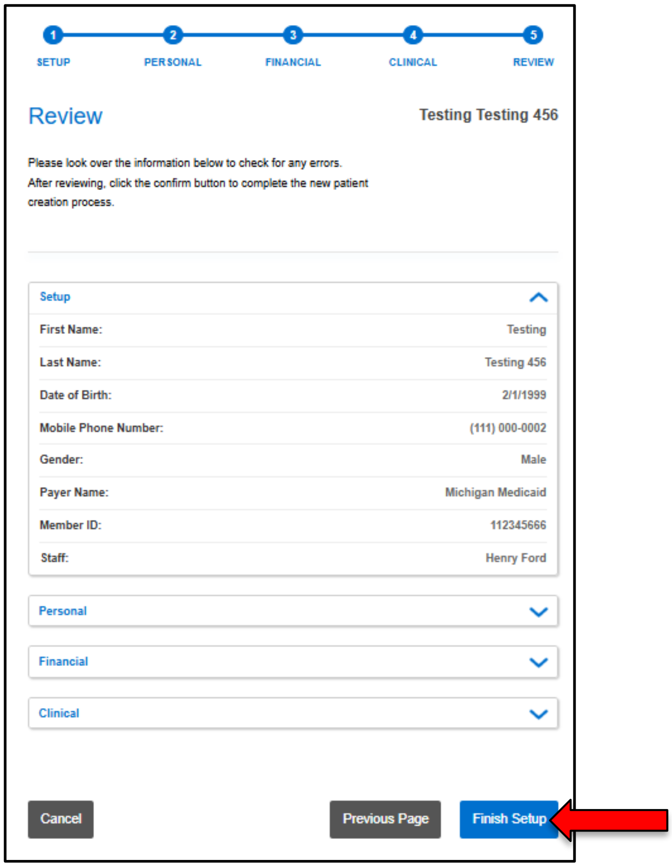


Fill out all required fields (they will be marked with a **red** asterisk)

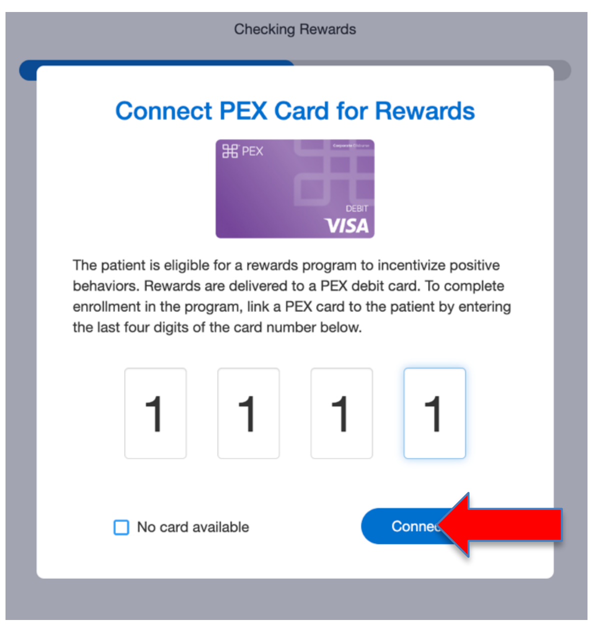
- **First Name:** Enter the Patient's given first name or nickname
- **Last Name:** Enter the Patient's last name
- **Date of Birth:** Enter the Patient's date of birth
- **Mobile Phone Number:** Enter the Patient's mobile phone number or choose 'Alternative' and 'Continue' to generate fake number.
- **Gender:** Enter the Patient's gender
- **Payer Name:** Choose "Michigan Medicaid"
- **Member ID:** Enter the Patient's Medicaid ID # (patients are only allowed to be associated with 1 clinic at a time. To prevent duplicate entries, if you attempt to enter a duplicate Medicaid ID, the system will not save the patient information. If needed, please contact CHESS Support for assistance)
- **Staff:** Select the staff member(s) associated with the Patient
- **Reward Programs:** Select applicable program (i.e.: Opioids **OR** Stimulants)

Confirm the set-up details are accurate and click **Save & Confirm**

If everything is accurate, click **Finish Setup**



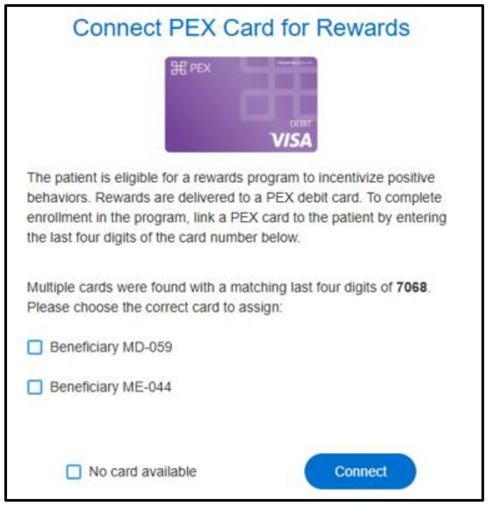
Next, a pop-up window will display to connect the newly enrolled Patient to their PEX card (which is the reloadable debit card which will get loaded with the patient's reward/incentive payments).



To link the patient to the card, enter the LAST 4 digits of the Patient's PEX card into the pop-up window and then click **Connect**.

The next pop up shows successful assignment of card to Patient. Click **Close** to move on.

If you receive an error message (that looks like the image below) due to multiple cards with the same last 4 digits, click the box next to the name on the card (i.e.: Beneficiary MD-059) you will be giving the patient you are enrolling. If you continue to receive an error message, try another card and contact CHESS Health Support via email at support@chess.health



VERY IMPORTANT: The card is 'Active'. The patient does **NOT** need to activate it.
If there is a sticker on the card with an instruction to activate the card, remove the sticker before handing the card to the patient. **Also, please remove the letter that is attached to the card prior to providing to the patient. This letter is not needed and will only cause confusion.**

Recording UDTs to Trigger Incentive/Reward Payments

Scheduling 2x Weekly UDTs

Patients will earn rewards for coming to clinic and providing a urine drug test (UDT) test result that is negative for the presence of opioids and stimulants; if the result is positive, or they do come to the clinic but are unable to provide a specimen, they will earn a smaller reward for doing so during the first twelve weeks of the program.

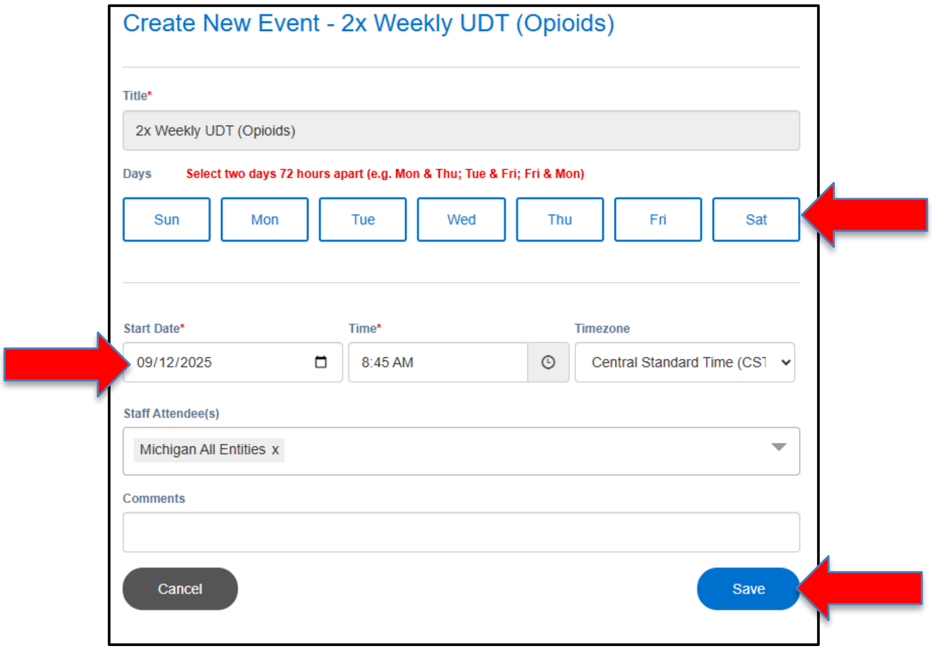
Providers will be recording in the CHESS Dashboard, with each visit, what the individual's test result was (or whether they didn't keep their visit to provide a UDT test result).

In order to make it easy to record a result twice a week for the first 12 weeks, and then once a week for the next 12 weeks, you will first schedule the visits (called "events" in the CHESS Dashboard). Then, each time the patient comes in, all you/your colleagues have to do is update the corresponding event with the status (e.g., positive, negative, etc.).

Please do not schedule any events outside of the 2, 12-week event series (instructions on scheduling events are found below) as these will interrupt the reward distribution schedule. If a patient misses an appointment, please do not schedule a make-up event. Instead all you need to do is update the event to the missed appointment status according to the instructions beginning on page 9.

As soon as you have linked the PEX card to the patient profile, you will see the following pop-up asking you to schedule the first 12 weeks of visits/events that correspond to when the patient will be coming in for their UDTs for the first 12 weeks. They will be coming in 2x per week for a total of 24 visits for the first 12 weeks. Click **Continue**

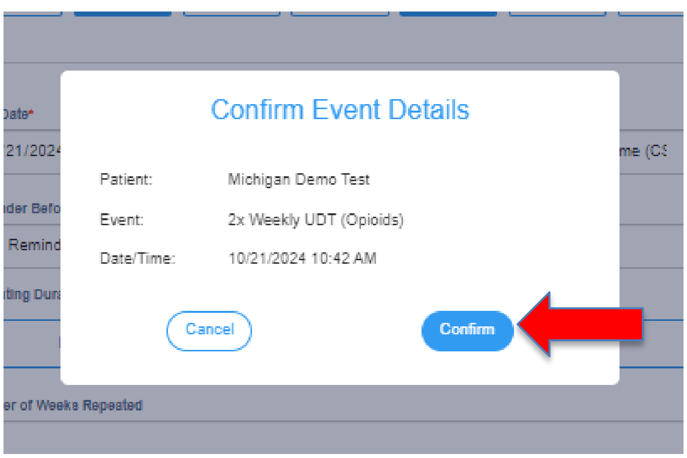
On the next pop up, indicate which two days of the week the patient will be expected to come in for their UDTs, during the first 12 weeks. It is recommended, but not required, that providers schedule the 2x weekly UDT appointments 72 hours apart. Please choose either: **Monday & Thursday** or **Tuesday & Friday** or **Friday & Monday**.



Put the **date of the first UDT in the Start Date field** (which could be today). Also indicate what **time they will be expected for their UDT tests**. If unsure about time, just choose 9:00 AM.

Nothing else needs to be changed. Just click **Save** and the first 12 weeks' worth of events will be scheduled for the patient.

This pop-up modal will appear. Confirm the date/time of the first UDT is correct.



If the date/time of the first UDT is right, click **Confirm**. If not, click Cancel and do again.

Entering Event Status to Trigger Rewards

For a Patient to receive a reward on their PEX card, a status of that event (UDT appointment) must be entered in the CHESS Dashboard. Once the status has been entered, if applicable, the Patient will immediately receive a monetary reward on their PEX card.

The event statuses you can choose from are:

- **Negative UDT** – no target substance present
- **Positive UDT** – target substance present
- **Missed Scheduled UDT (excused)** – Patient provided advanced notice that they could not attend the appointment
- **Missed Scheduled UDT (unexcused)** – Patient did not show to the appointment and did not provide advanced notice
- **Unable to Provide Specimen** – unable to provide specimen to be tested

Incentives will begin at $10 and will increase by $1.50 after every two consecutive negative UDTs. When a Patient's test shows that they used the target substance (positive UDT) or when the Patient has an unexcused absence (no advanced notice that they will miss), incentives will reset to a lower amount (the initial amount of $10). Once the Patient's UDT shows 2 consecutive negative results, incentives will increase.

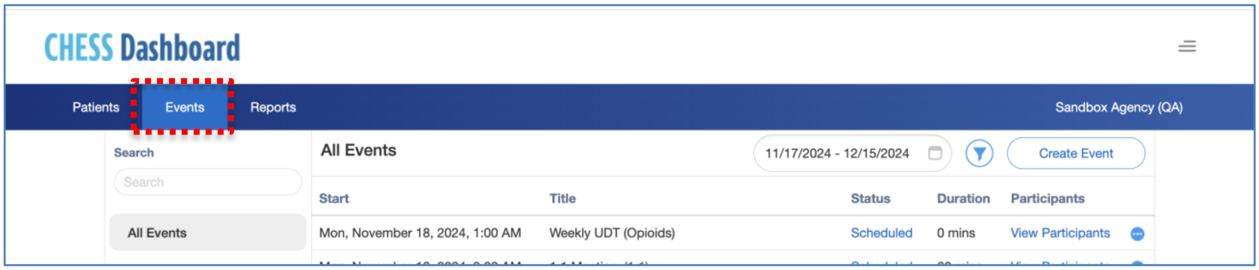
A "recovery" of the pre-reset value will occur after two consecutive UDTs that are negative for the target substance. At that time, the participating Patient will recover their highest, previously earned incentive amount without having to restart the process, no matter when in the course of the program the use of the target substance occurs. Patients will not be penalized for UDTs that return positive for other substances that are not being targeted under the RI Pilot.
A monetary reward of $5 is given on an unlimited basis for the Patient's continued engagement in treatment so the Patient can be rewarded for attending the appointment and participating in the UDT. This reward can be distributed no more than 1 time per day and only applies to the first 12 weeks of the pilot.

Important: Please update the status of a negative/positive UDT as soon as possible after the test results are available so that the patient gets their reward immediately. Ideally, this would be done prior to the patient leaving the clinic.

Very Important: Always record events in order. If a patient has events in the past that do not have statuses (such as if the patient missed their UDT visits and no one recorded these missed events), then **FIRST** mark the status of these past events (likely "Missed Scheduled UDT") and only then mark the status of today's event.

There are 2 ways you can find a patient's scheduled event to record the status so the reward payment goes their PEX card (via the Events TAB or via the Patient Detail Page)

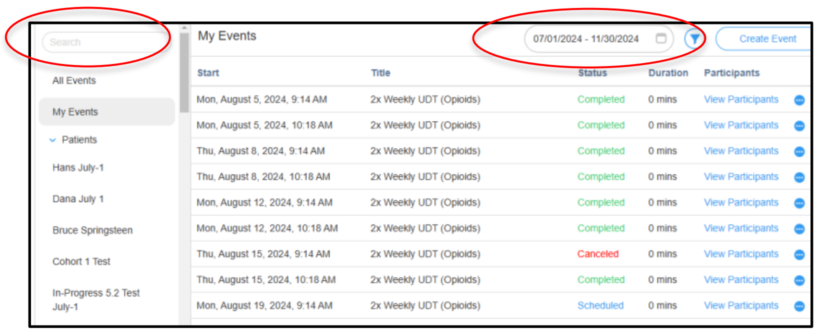
Via the Events TAB, click on the **Events** from the Navigation task bar of the CHESS Dashboard.



Here, by default, all events populate for all your patients.

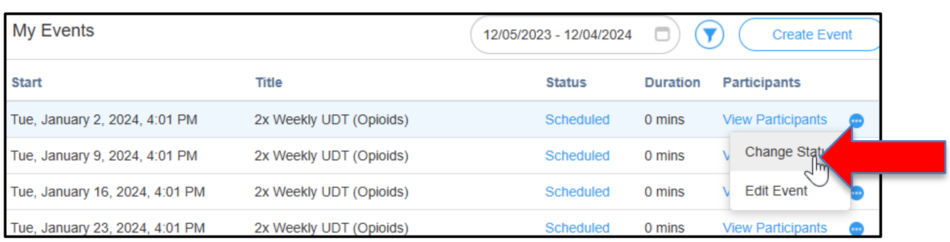
The default view shows you events and the status of events for the past 14 days and the next 14 days.

You can search for a specific patient by entering their name in the search box in the top left and you can change the date range, including just looking at today's results.



The status of the event will always populate as scheduled. You can change to canceled or completed. If the event (UDT appointment) has been completed, choose completed, if canceled, choose canceled. The purpose of this is to provide you with an overall view of the statuses of all your Patients. This list is what you will see when you click the Events TAB without entering in the Patient's name in the search field

To record the result of a patient UDT appointment (event status), click on the actual event that needs to be updated by going to the blue circle with the 3 dots inside. From the options listed (Change Status or Edit Event), choose **Change Status.**

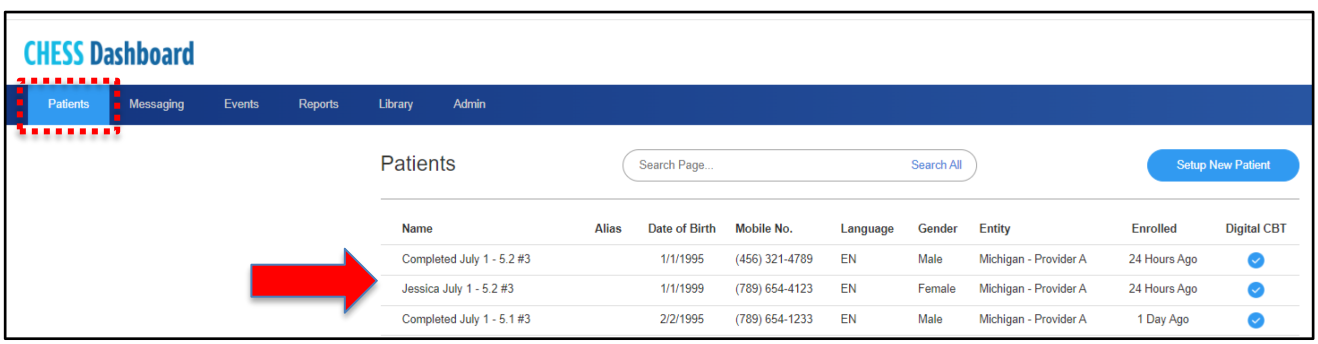


The next pop up will ask you to choose the status of the UDT Event/Appointment. Choose the applicable status from the drop-down. Then, next to the Patient's name, click to display the drop down and click on the applicable status (i.e.: Negative UDT, Positive UDT, Missed Scheduled UDT (excused), Missed Scheduled UDT (unexcused) or Unable to Provide Specimen). Once complete, click **Save.**

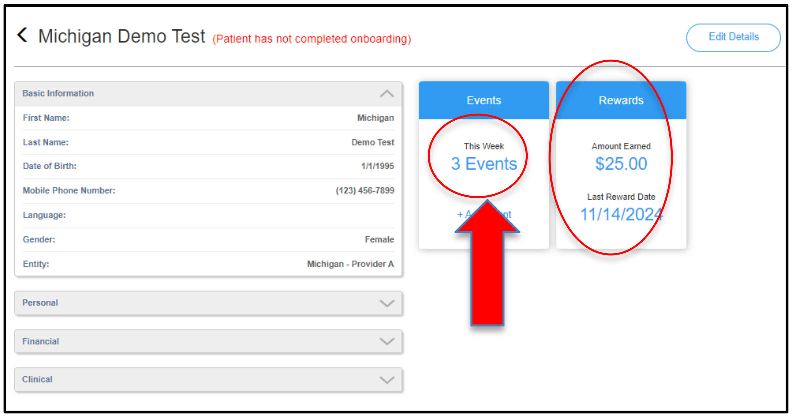
***** Reminder: Please be sure you update events in the correct order by date otherwise you risk interrupting the escalating reward amounts. *****

*****Important: prior to clicking Save, double check for accuracy. Click Cancel and start over if needed. Once a status has been assigned, it can't be changed*****
PLEASE NOTE: if you update an event inaccurately, please contact CHESS as soon as possible so we can fix and prevent the incentive schedule from being interrupted.

Via the Patient Detail Page, you'll need to access the Patient you want to update under the **Patients** TAB by choosing the applicable Patient from the patient list



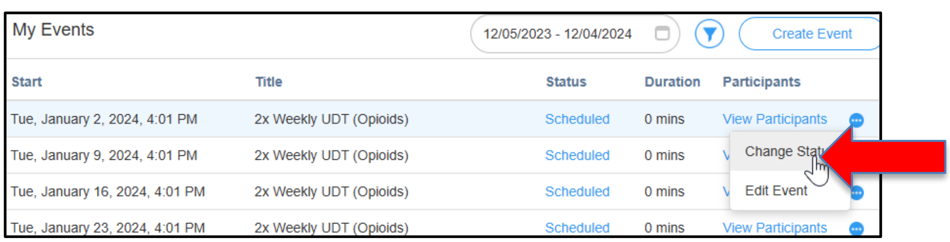
Then from inside the patient details page, click on **This Week** in the Events card.



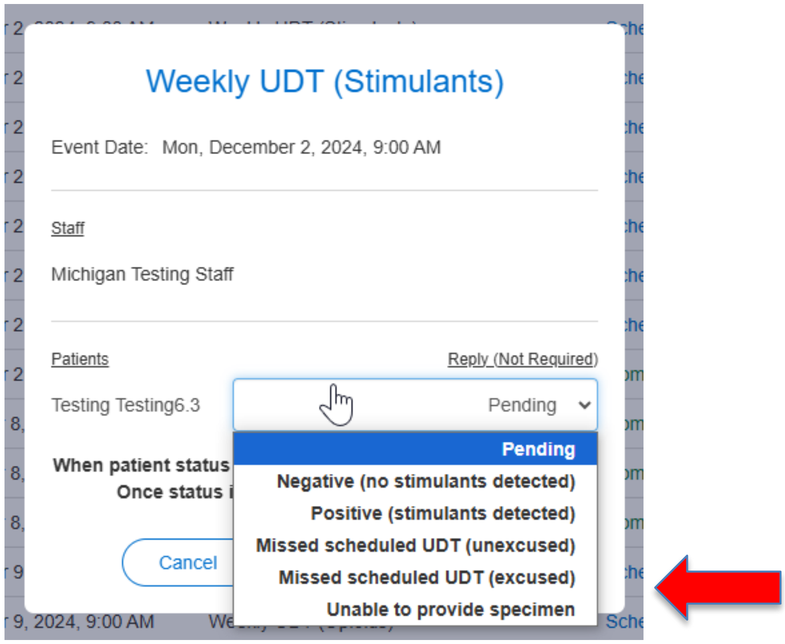
Please Note: From the Rewards card, you can see the amount of rewards earned to date and the date the last reward was received

Then you will see the default setting of events that are scheduled for Last & Next Week or you can change the setting to Next Week or Last 7 Days. Click on Open Full View to go to all events for that particular patient.

To record the result of a patient UDT appointment (event status), click on the actual event that needs to be updated by going to the blue circle with the 3 dots inside. From the options listed (Change Status or Edit Event), choose **Change Status.**



The next pop up will ask you to choose the status of the UDT Event/Appointment. Choose the applicable status from the drop-down. Then, next to the Patient's name, click to display the drop down and click on the applicable status (i.e.: Negative UDT, Positive UDT, Missed Scheduled UDT (excused), Missed Scheduled UDT (unexcused) or Unable to Provide Specimen). Once complete, click **Save.**

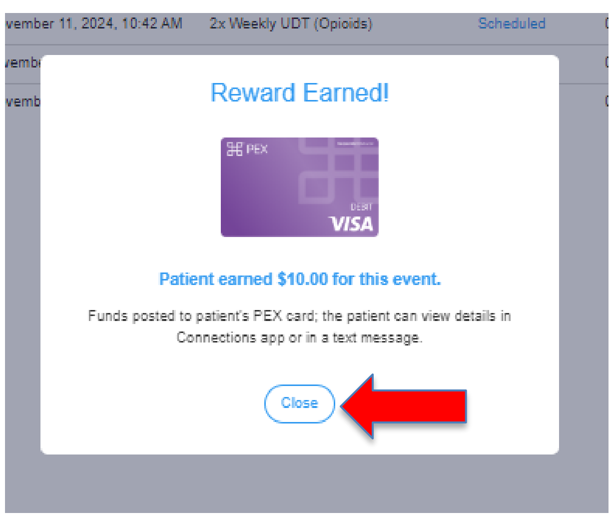


***** Reminder: Please be sure you update events in the correct order by date otherwise you risk interrupting the escalating reward amounts. *****

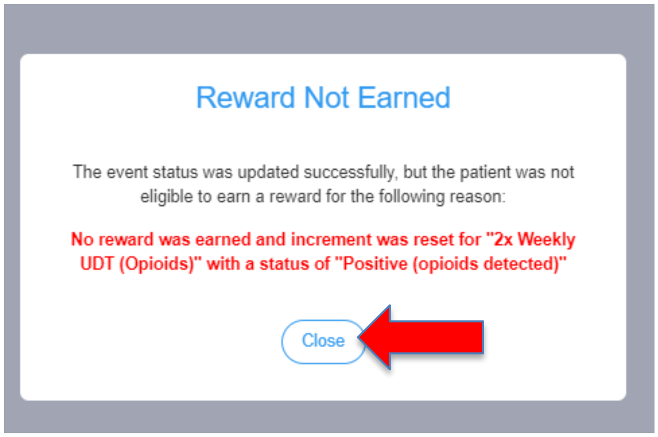
*****Important: prior to clicking Save, double check for accuracy. Click Cancel and start over if needed. Once a status has been assigned, it can't be changed*****

PLEASE NOTE: if you update an event inaccurately, please contact CHESS as soon as possible so we can fix and prevent the incentive schedule from being interrupted.

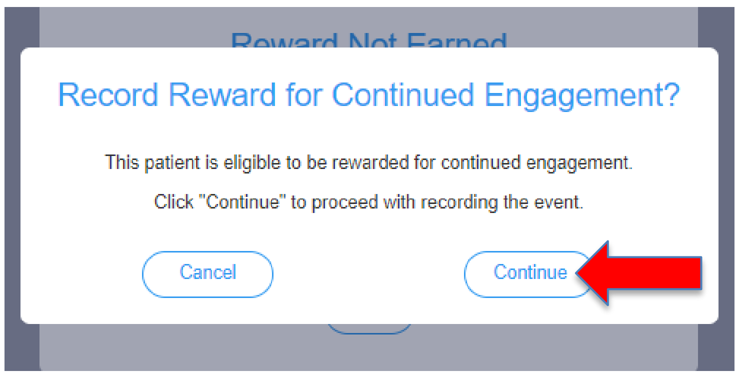
The next pop-up window confirms that the Patient has earned the applicable reward. Click **Close** to close this pop-up.



For **Positive UDT, Missed Scheduled UDT (unexcused/excused)** and **Unable to Provide Specimen** statuses only, a pop-up window appears informing you that the Patient did not receive a reward. For **Positive UDT** and **Missed Scheduled UDT (unexcused)** the Patient reward amount will be reset back to $10. Click **Close**

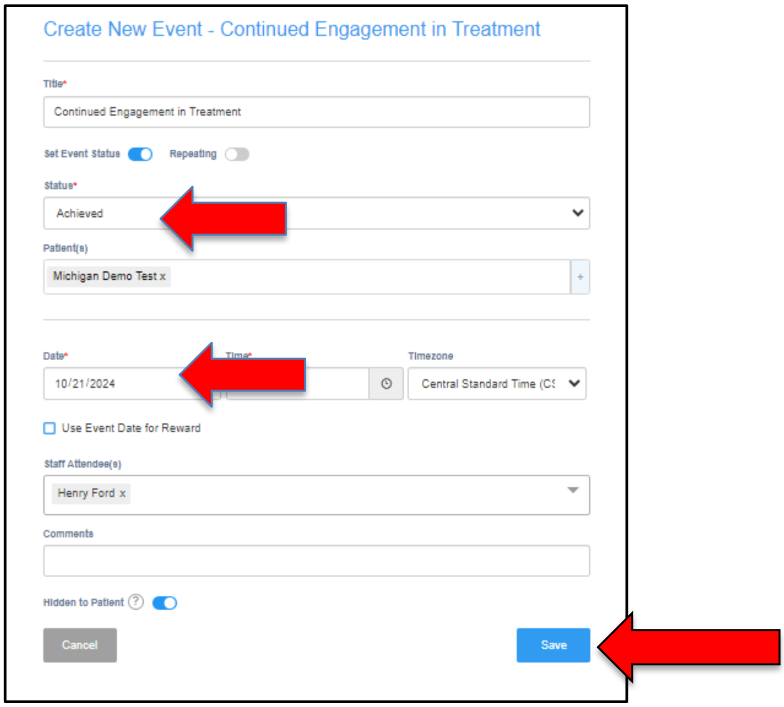


For **Positive UDT** and **Unable to Provide Specimen ONLY**, you will be asked to confirm you want to reward the Patient for Continued Engagement. Click **Continue**

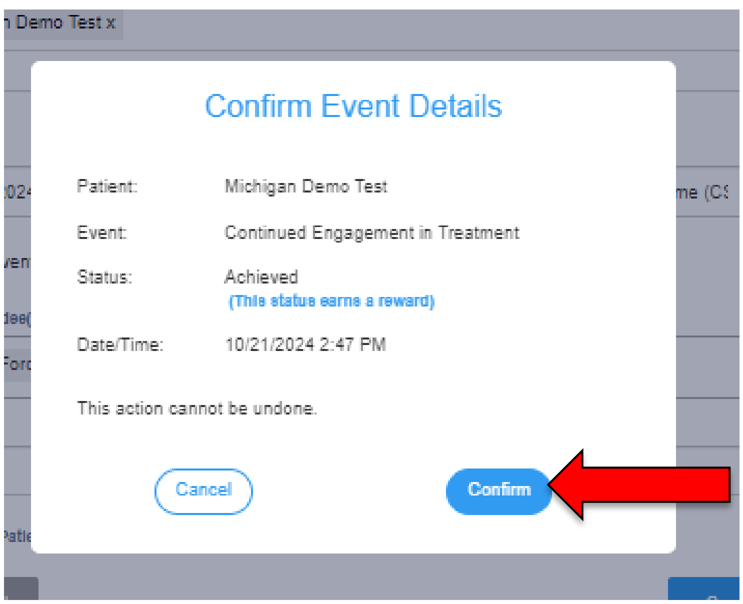


The next screen requires you to create the event to trigger the reward distribution for continued engagement in treatment.

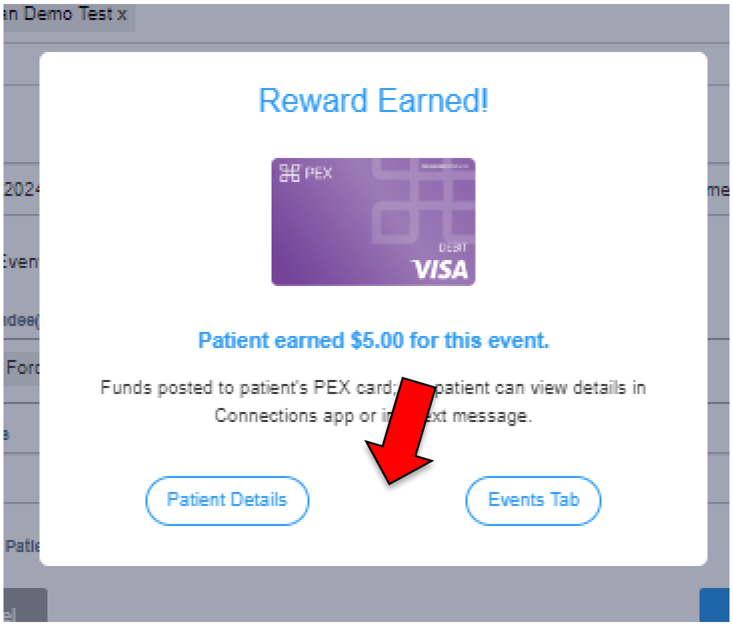
The **Achieved** status will be displayed automatically. Ensure all other information entered is complete and accurate. The date will automatically populate to the present day. Edit the date if applicable and click **Save**



Confirm the event details. If everything looks correct, click **Confirm**. If not, click **Cancel** and start over.



The Reward Distribution pop-up appears notifying the reward has been successfully distributed (reward for continued engagement is always $5). From here click either **Patient Details** or **Events Tab**.

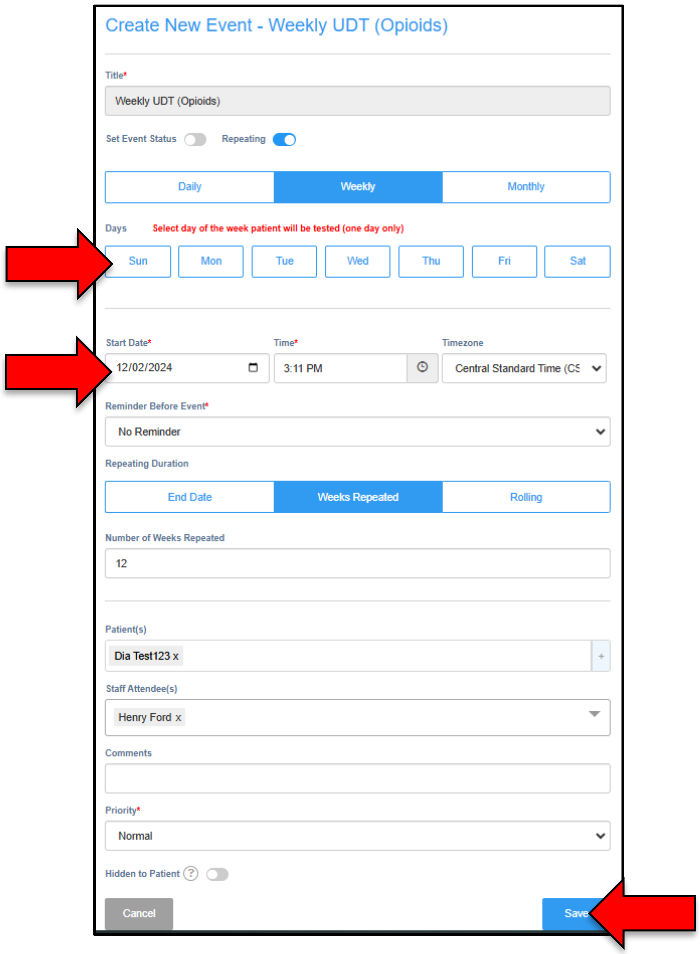


Scheduling Weekly UDTs

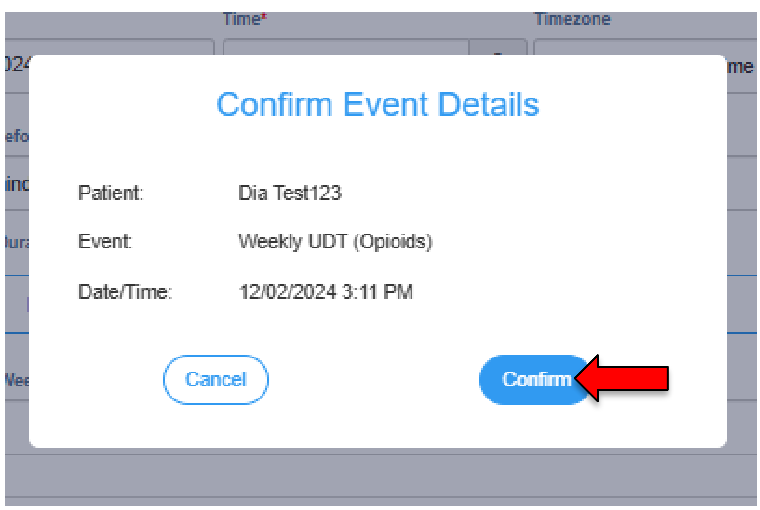
After you enter the status for your 24th event (the last event for 2x Weekly UDTs), you will see a pop up asking you if you want to schedule the next 12 events (Weekly UDTs). The pop up will look like this:

Click **Yes**

For Weekly UDTs, choose the one day of the week your patient will be coming in for their UDTs. Then choose the start date and time of the weekly appointments (if unsure on time, choose 9:00 AM). Click **Save**



Next, confirm the event details. If correct, click **Confirm**. If not, click Cancel and edit.



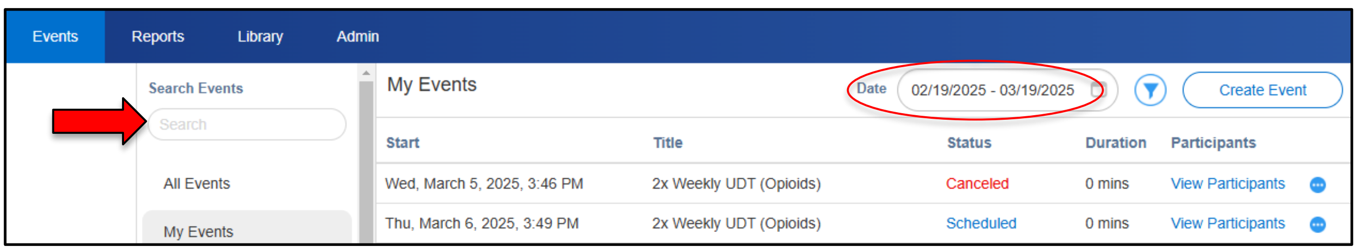
Edit Event Date or Cancel Events

Edit Events:
If one of the scheduled events falls on a holiday or the patient notifies you they won't be able to attend one of their events, you have 2 choices:

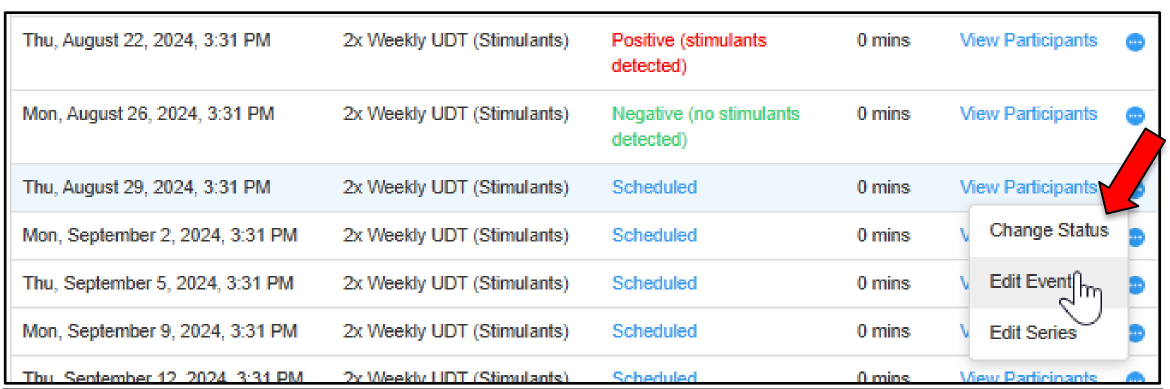
1. You can do nothing - leave the event date as scheduled and update the event with the applicable status when they complete the UDT
2. Or you can edit the event date to the rescheduled date by following the directions below

If your patient is unable to attend events on the same days that were established when you first created the series, you can edit the day of the events per the instructions below.

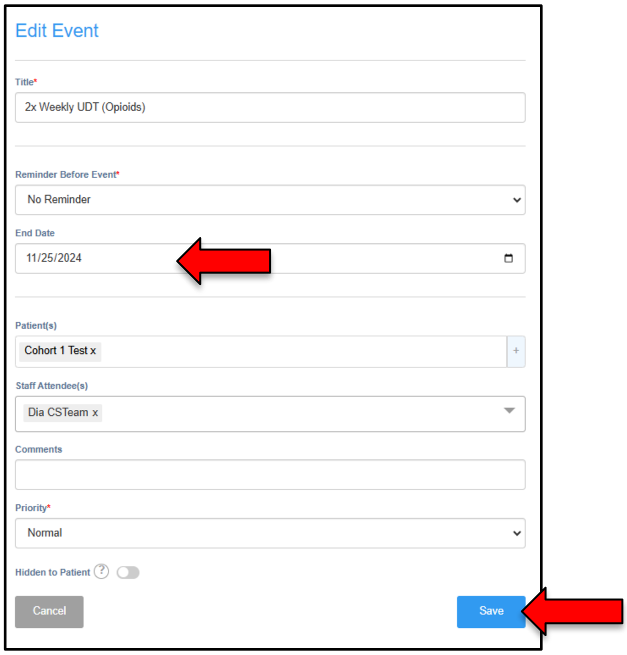
Editing Event Date:
To edit an event date, you'll first want to locate the applicable event in the CHESS Dashboard. To do this, you can search events by patient and you can filter to the applicable date range.



Once the event that needs to be edited populates, click on the 3 dots in the blue circle and select **Edit Event**



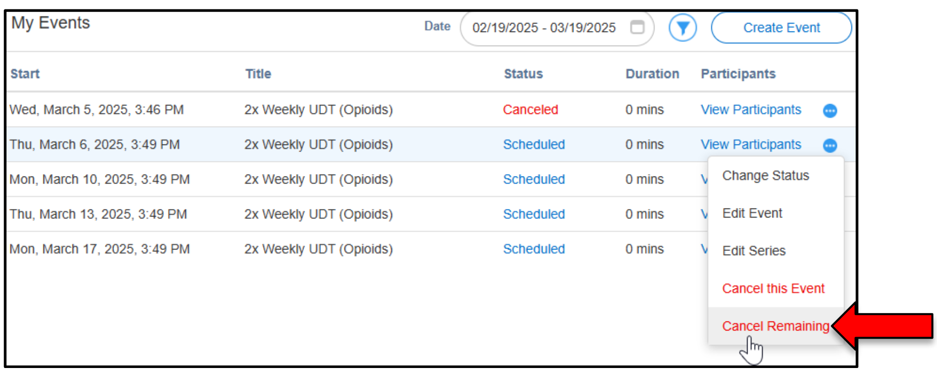
The event date will automatically populate to the same date of the originally scheduled event. Change the date to the date that is correct for the rescheduled UDT appointment. If everything looks correct, click **Save**



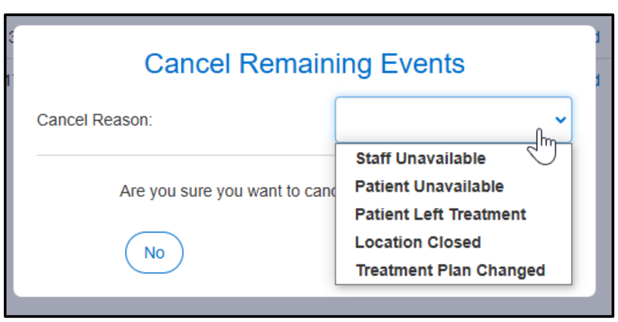
Cancel Events:

If a patient needs to be disenrolled from the rewards program, please ensure you cancel all remaining scheduled events for that patient. This helps prevent confusion on which events still need to be updated.

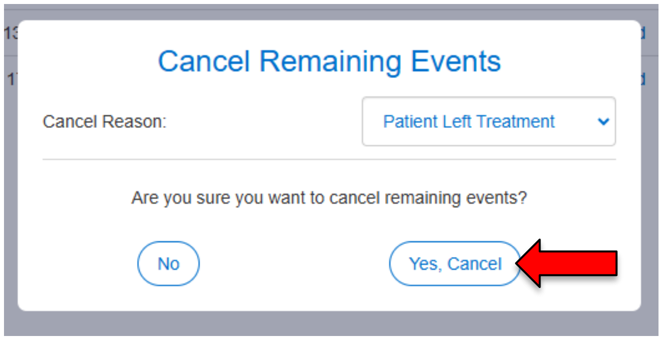
To do this, go to the Events TAB in the Dashboard and locate the first event in the series that needs to be canceled (see instructions above on locating events). Go to the first event listed in the series and click on the circle with the 3 dots inside.



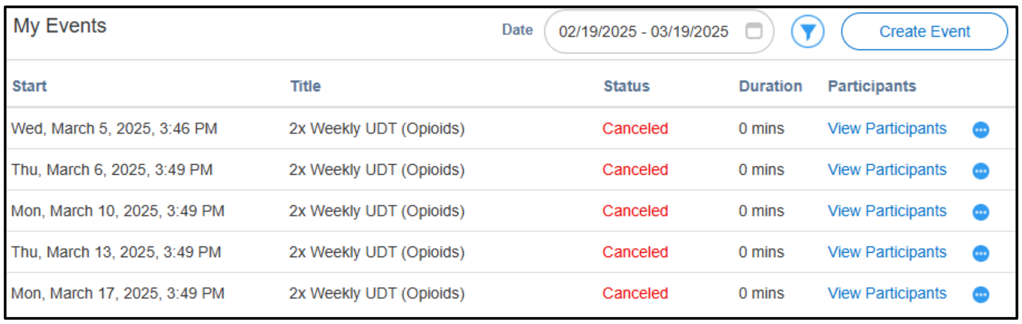
From the drop down, choose "**Cancel Remaining**" then choose the cancelation reason. Your options are Staff Unavailable, Patient Unavailable, Patient Left Treatment, Location Closed, and Treatment Plan Changed.



Choose the cancel reason and then click, **Yes, Cancel**

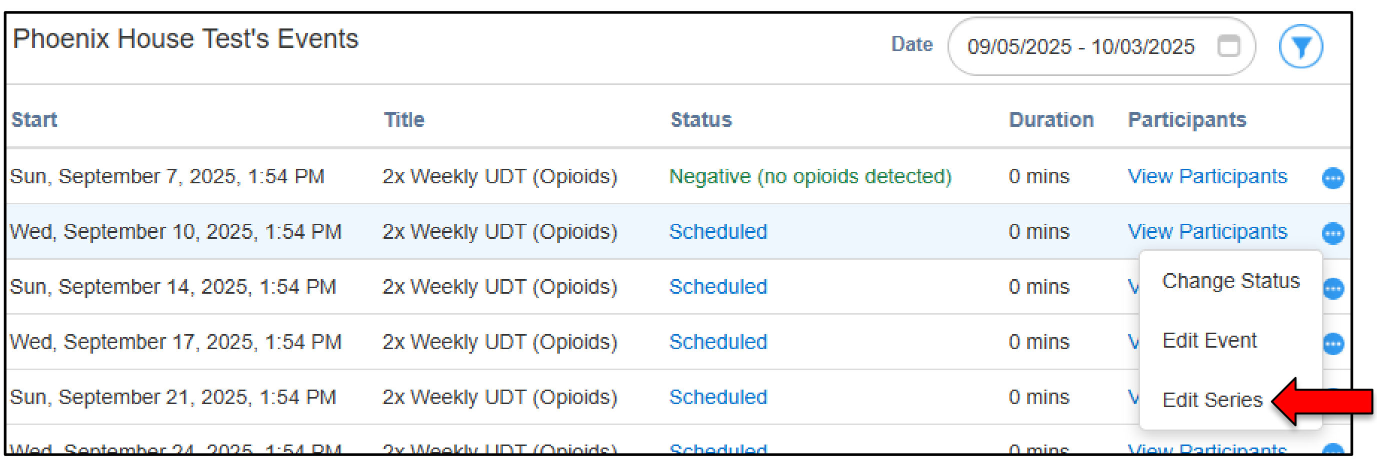


Once you choose to cancel, all events in the series will be updated to "Canceled" so you can easily identify which events no longer need to be updated

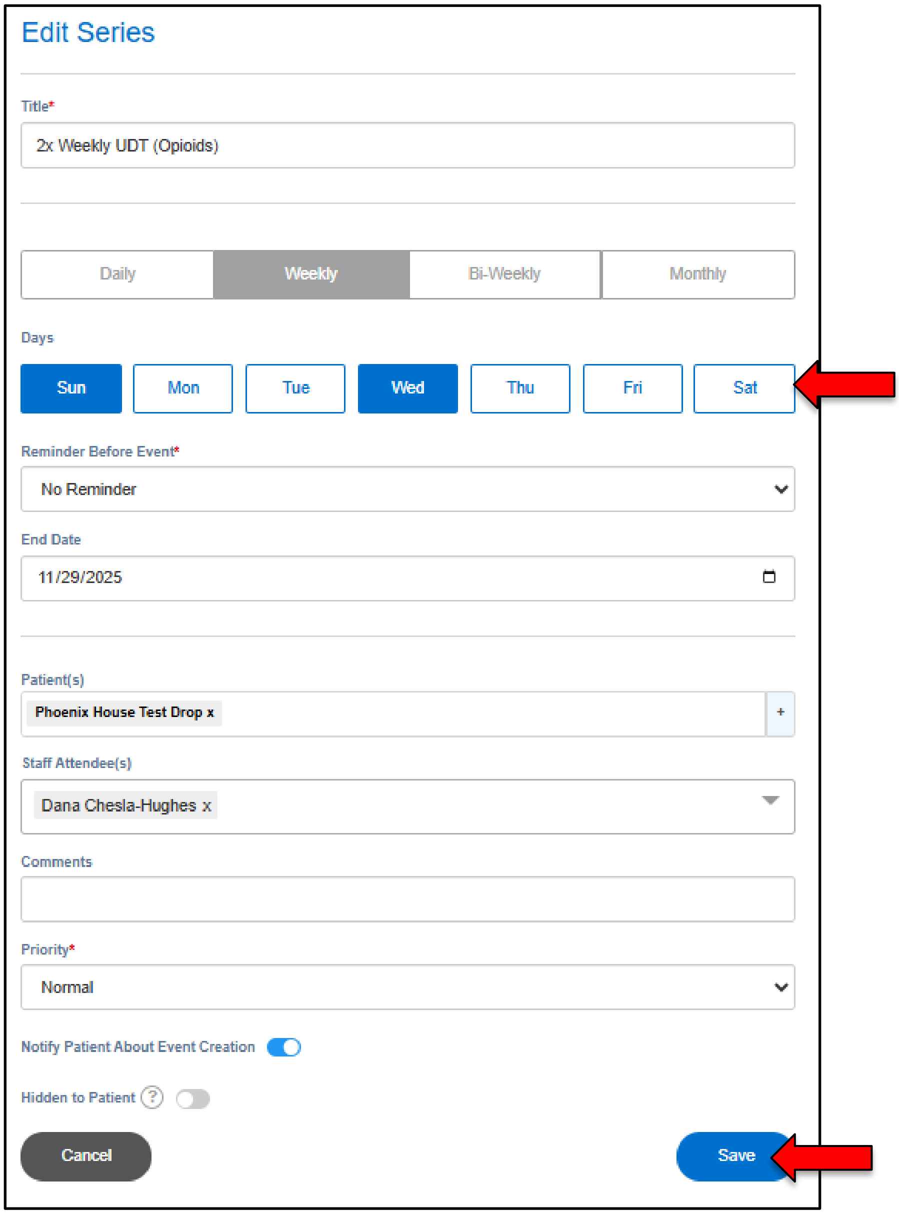


Edit Days of the Event:

As shown in the instructions above, find the first event of the series that you need to change and click on the blue circle with the 3 dots inside. Then choose **Edit Series**



Then you will see the following screen. Once on that screen, choose the applicable days of the week and then click **Save**.



Patients TAB

The Patients TAB of the CHESS Dashboard allows staff to easily search for a specific Patient or browse a list of existing Patients.

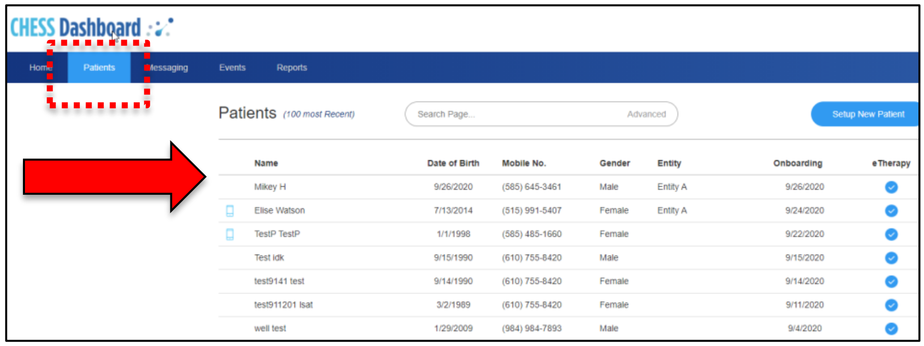
The Patients TAB contains the following functionality:

- Add a new Patient to the CHESS Dashboard
- Browse a list of existing Patients
- Search for a specific Patient
- Edit Patient details, such as Patient phone number, Medicaid ID, etc.
- Upload Patient Consent Form

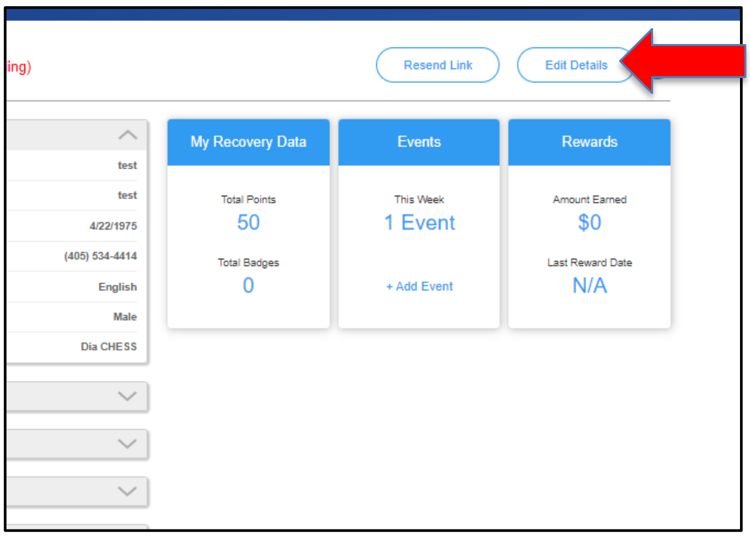
- Check details regarding the Rewards Program

Edit Patient Information

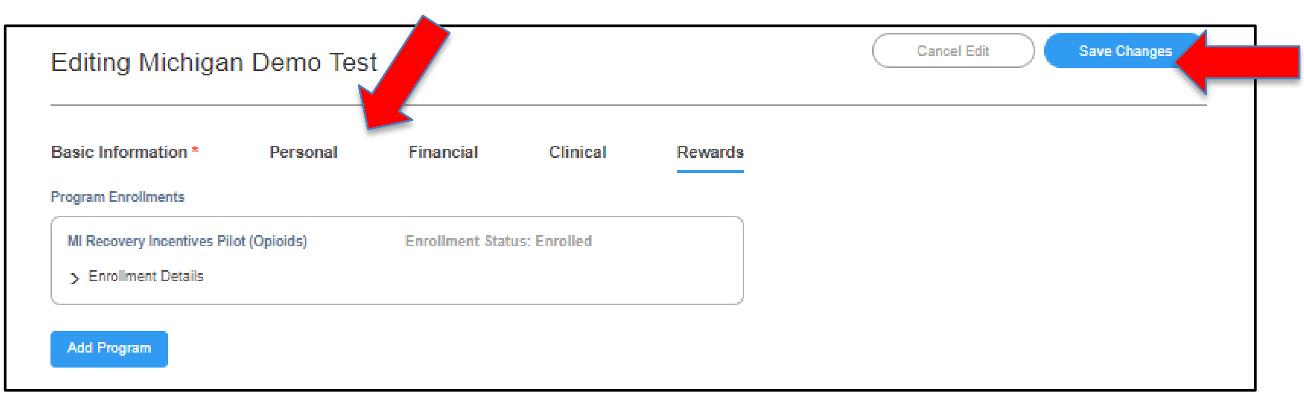
Click on the **Patients** TAB and select the Patient to view



Once the profile is open, click on **Edit Details**



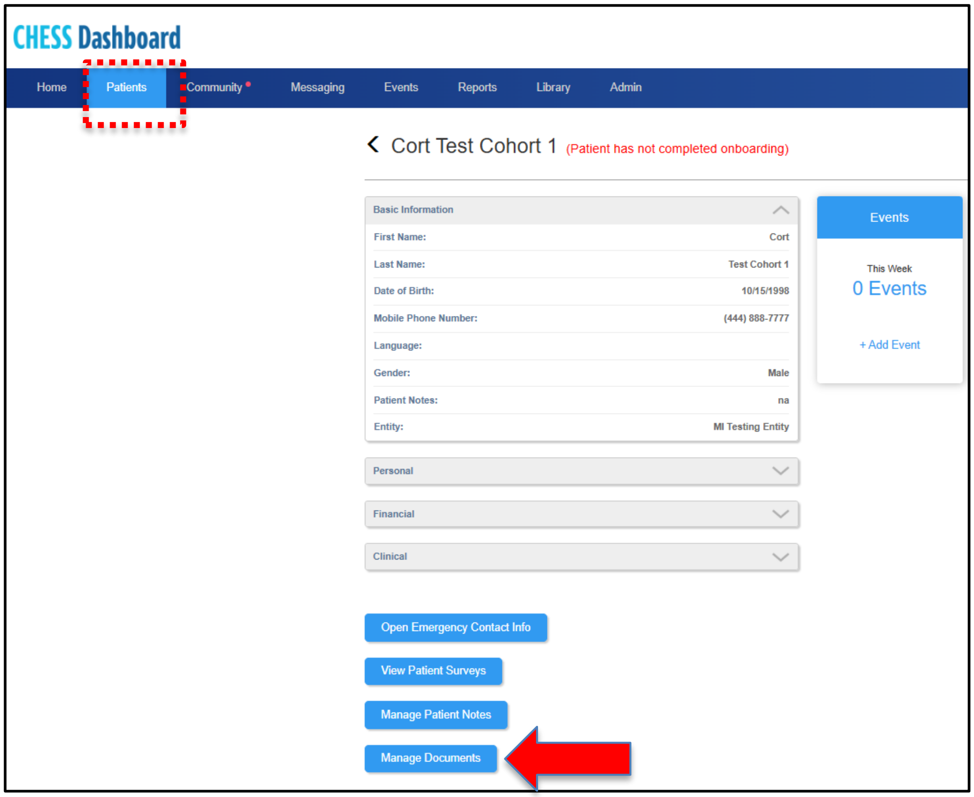
Choose a sub-tab (i.e.: Basic Information, Personal, Financial, Clinical or Rewards) as applicable and edit the information. When finished, click **Save Changes**



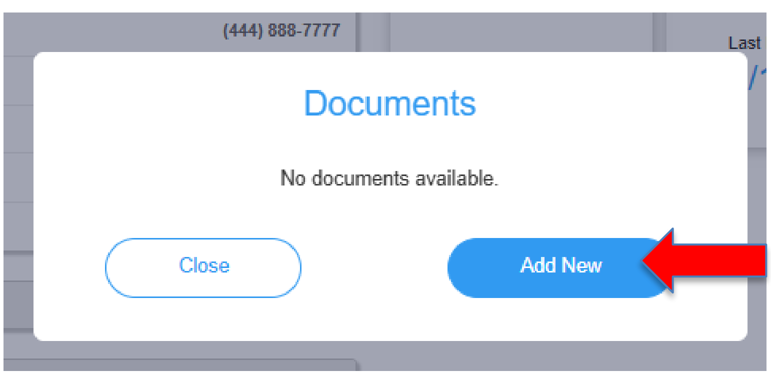
Adding Patient Consent Forms

You can attach documents to your Patient's profile (i.e.: consent forms). First you will need to ensure you have the document saved on your computer so it can be uploaded to the CHESS Dashboard.

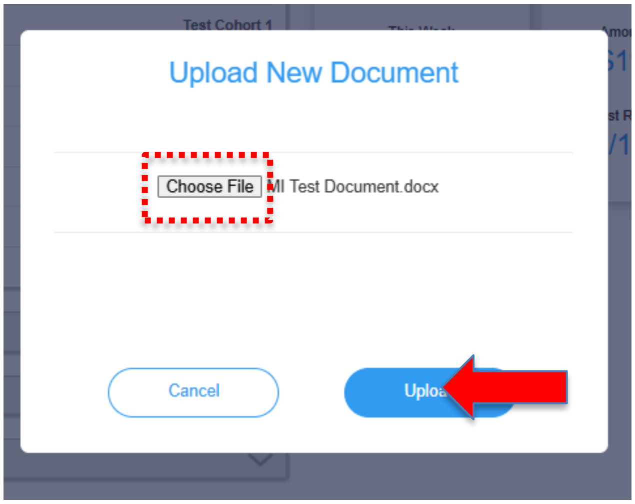
From the Patients TAB, click on the Patient's name to open their profile then click on **Manage Documents**



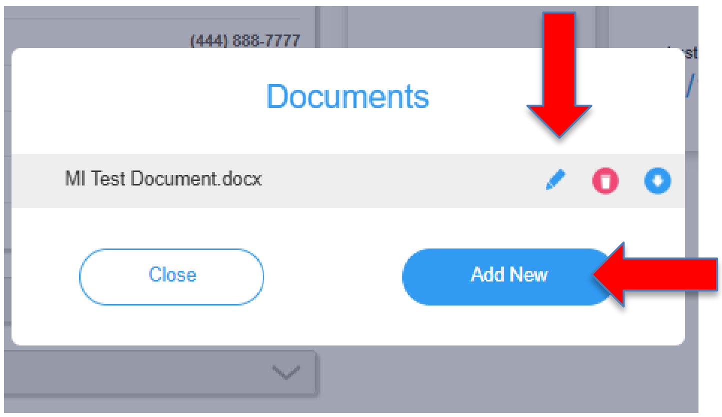
Next you will see a pop up that looks like the image below. Choose **Add New**



Then you will be asked to choose your file to upload. Once you have chosen your file, click **Upload**



You will then see that the file has been uploaded. From here you can edit the name of the file, delete the file, add an additional file, or download the file.

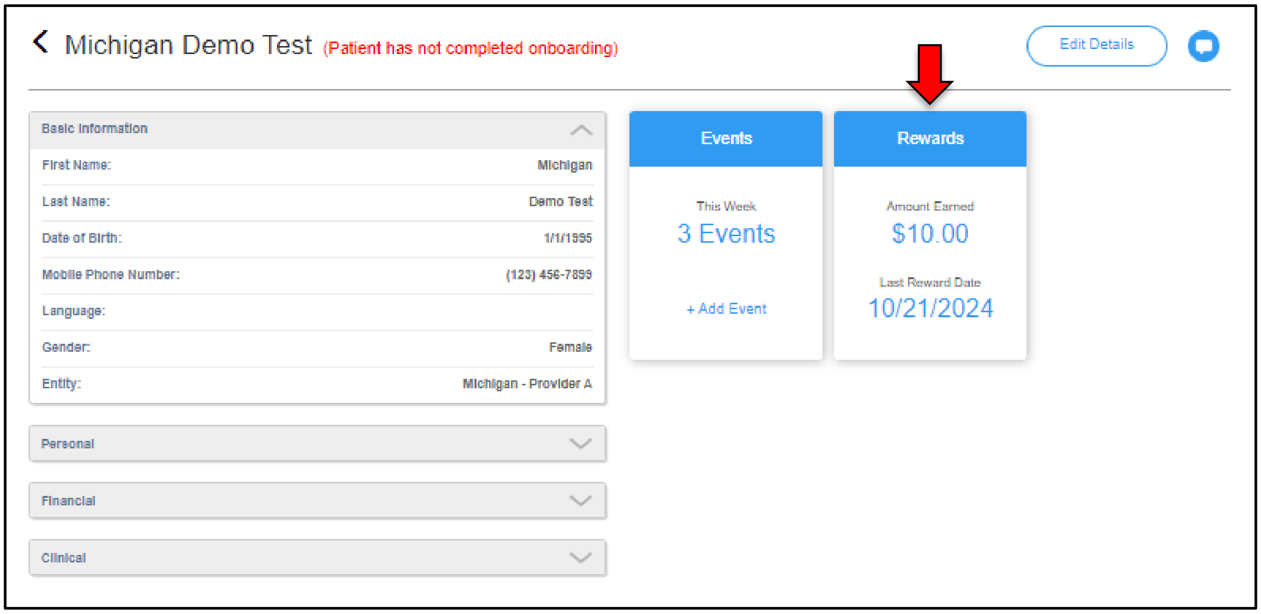


To access the file in the future, go to the Patient profile and click on **Manage Documents**

Rewards Module Details

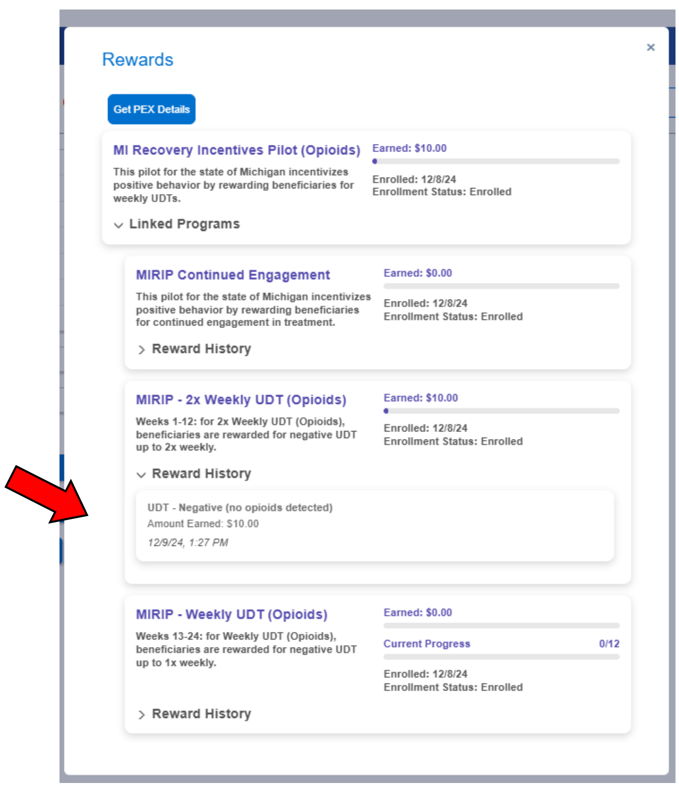
On the Rewards Card in the patient profile, you can see the amount of rewards earned to date and the date the last reward was earned.

Click on the Rewards Card to open the rewards information for the Patient chosen.



When this card is clicked, the Rewards details for the Patient will display including:

- Reward history, the amount of money earned to-date, and enrollment status. Click on the carrot next to Reward History to see the drop down that includes all rewards details



Enroll/Disenroll/Complete Patients in the Rewards Program

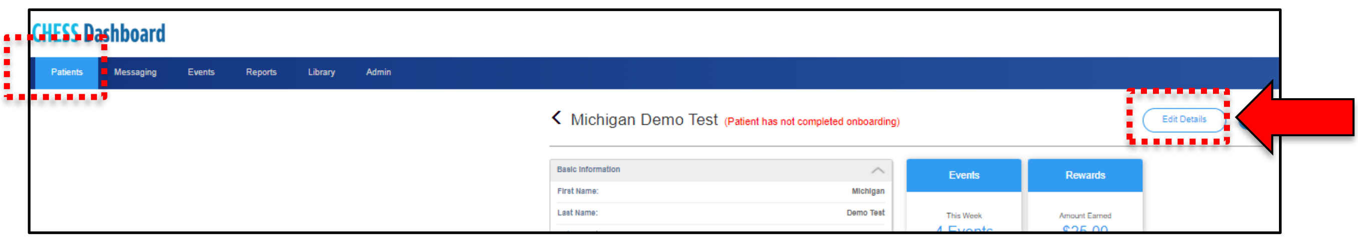
Patients' enrollment status in the rewards program should be entered in the CHESS Dashboard during the Patient set up as seen beginning on page 3 above.

Enrollment Status in the Rewards Program can be edited according to the following:

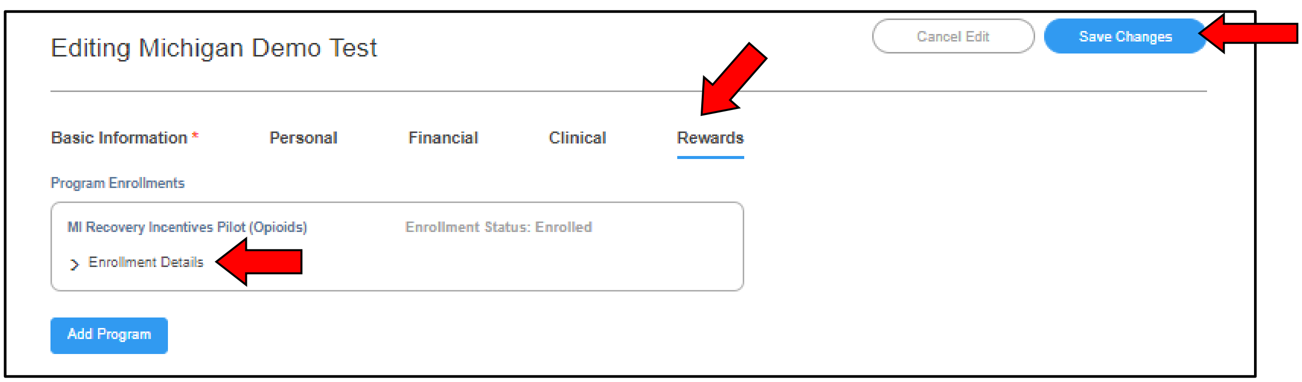
- **Enrolled** = Eligible for Rewards
- **Disenrolled** = Not eligible for Rewards (e.g., early withdrawals/terminations). If a Patient is erroneously enrolled in Rewards, use "Disenrolled" to turn off Rewards access.
- **Completed** = Completed weeks 1-12 (2x Weekly UDT) and completed weeks 13-24 (Weekly UDT)

There may be times when you need to disenroll your patient from the rewards program (i.e.: no longer Medicaid eligible, extended inpatient hospitalization/jail term, etc.). If it is determined after disenrollment the patient is eligible for rewards again (after hospitalization/jail term, etc.), please create a new enrollment for your patient. Patient's enrollments cannot be paused. They can only be disenrolled with a brand new enrollment being created, if needed, in the future.

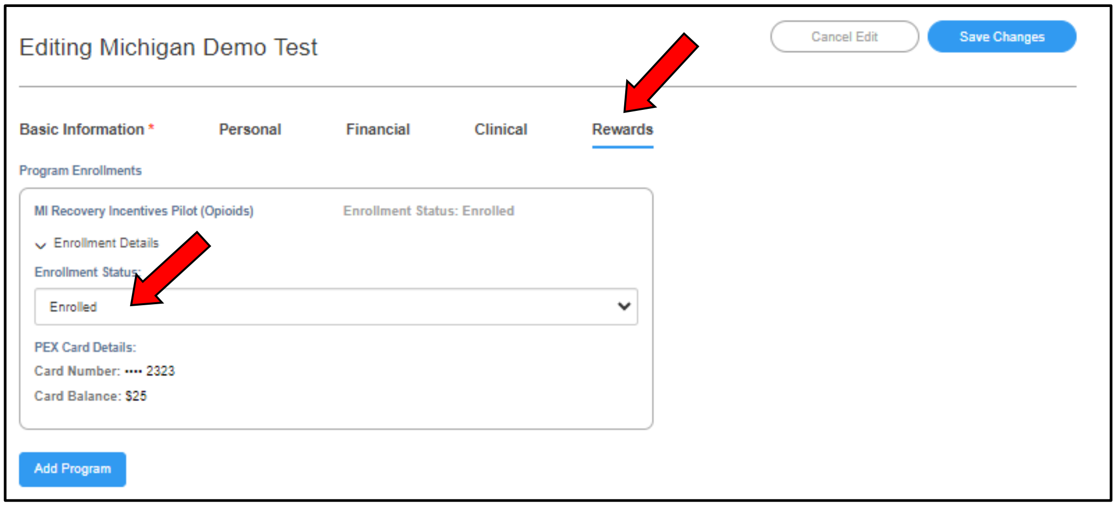
From the **Patients** TAB, open the Patient's detail page as outlined above. Click on the Patient's name to access their account, then click on **Edit Details**



In the patient profile, click the sub-tab **Rewards** and the following screen will populate. To disenroll or enroll a participant in the Rewards Program, click on the dropdown next to **Enrollment Details**

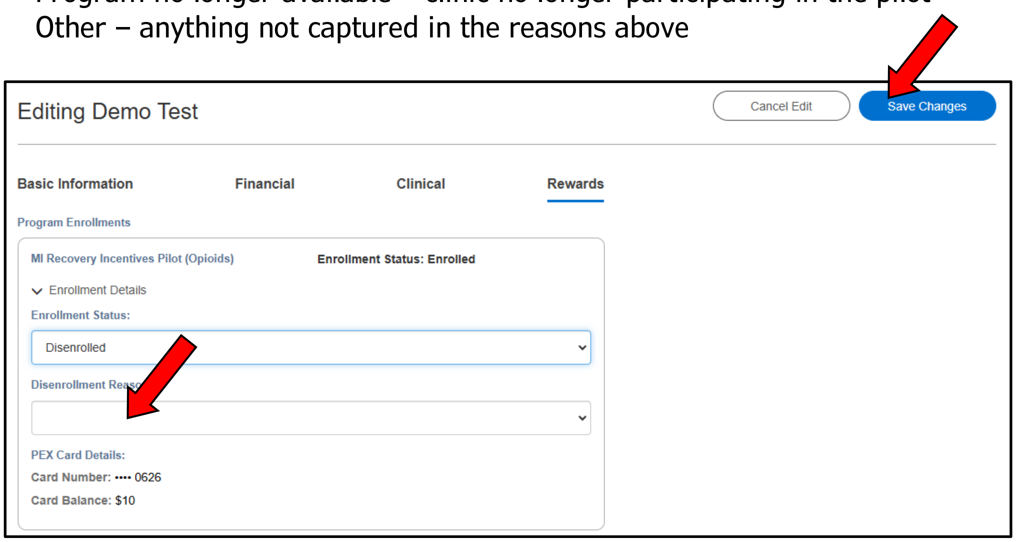


Edit participant **Enrollment Status** as appropriate:



When disenrolling a Patient, you can select the reason for disenrollment. Your options are as follows:

- Patient Non-Adherent - excessive unexcused absences or positive results
- Patient Ineligible/loss of coverage – no longer meets requirements to participate in the pilot (ex: loss of Medicaid coverage)
- Patient left treatment (AMA) – patient dropped out of clinic services against medical advice
- Patient moved to alternate LOC – patient is inpatient
- Patient changed providers – patient moved services to a different provider who does not participate in the Recovery Incentives Pilot
- Patient completed treatment – patient discharged from clinic services
- Patient deceased – patient passed away while being enrolled in the pilot
- Patient requested – patient asked to be taken out of the pilot
- Program no longer available – clinic no longer participating in the pilot
- Other – anything not captured in the reasons above



Once complete, click **Save Changes** in the upper right-hand corner.

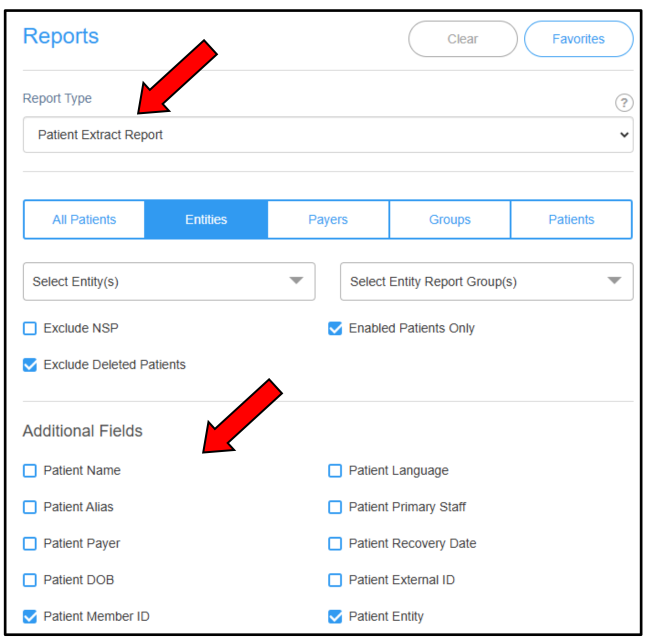
When you disenroll a patient from rewards, please be sure to cancel the remaining events they have scheduled. See page 19 of this document for instructions on canceling events.

Run Reports

If you would like to run reports for data analytics, you can easily do this from the CHESS Dashboard. Once you have logged into the Dashboard, click on the Reports TAB on the task bar

The next screen will populate. Choose the type of report you want to run from the Report Type dropdown. Reports applicable to the RI Pilot are Reward Program Analytics, Reward Program Disenrollment Increments, and Reward Event Analytics.

You also have the option to choose from a variety of Additional Fields. For example, Member ID # (this is the Patient Medicaid number), Patient Entity, etc.



Reward Reports are:

Reward Program Analytics: captures data on unique number of Patients who participate in the pilot, who successfully completed participation in the pilot, started in the pilot during the selected date range, Patients that dropped out of the pilot, average length of participation in pilot, percentage of available incentives earned across Patients, and average monetary value of incentive earned across Patients.

Reward Program Disenrollment Increments: captures data on the percentage of Patients who stop earning incentives at defined increments. Increments of time are established by weeks. For example, Week 1-3, Week 4-6, Week 7-9, etc. of the pilot.

Reward Event Analytics: captures number (or percentage) of UDT results that are positive and negative.

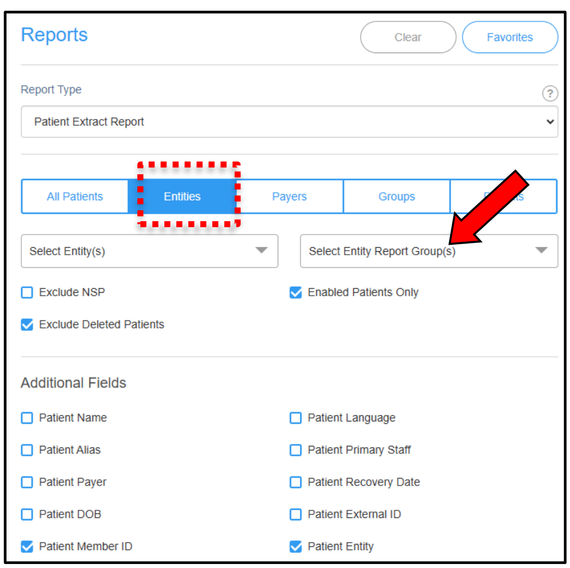
Reward Status Report: reflects earnings for individuals enrolled in the rewards program during the date range entered. It also shows which rewards program the patient is in, their enrollment status (i.e.: enrolled/disenrolled/completed), disenrollment date and disenrollment reason.

Reward Audit History Report: reflects data on reward statuses and how much money was distributed during the date range entered. Also shows what staff members initiated the reward distributions and on what day/time.

Report Groups

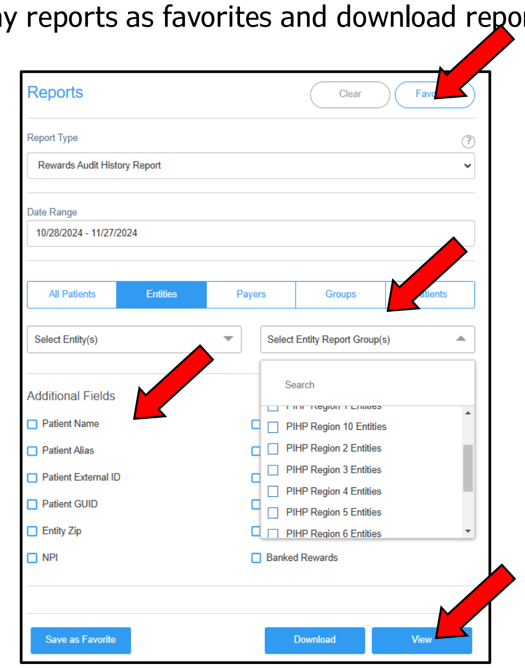
You can pull data for a specific entity or report group. Report groups allow for data pulls from multiple entities at one time. The RI Pilot report groups include entities by region for PIHP staff and cohorts for the State staff. Access to reporting groups is determined by allowable PHI to view.

To access your report group, follow the instruction above (i.e.: go to the Reports TAB and choose the type of report you want to view). Then once you click on Entities, you will see an option for Select Entity Report Group(s)



When you click on Select Entity Report Group(s), you will see a drop down of the available groups. Click the box to the left of the name of the group you want to access then click **View** to run the report.

*** Please note: you can save any reports as favorites and download reports into a .xls document.***



Important Information on PEX Cards

There will be instances where Patients lose their PEX card. When this happens, notify CHESS Health Support team immediately according to the contact information below. Pilot staff must contact CHESS Health on behalf of patients.

When you contact CHESS Support regarding a lost PEX card, you will need to provide the last 4 digits of the lost card and the last 4 digits of the replacement card so the support team can deactivate/activate accordingly. If there are any unspent funds on the lost card, the CHESS support team will transfer the funds to the replacement card.

CHESS Support is available to you on Mondays – Fridays from 8:00 AM ET to 6:00 PM ET. Emails are addressed quicker than phone calls.

Things to know about PEX cards:

- PEX cards can be used as debit or credit. If someone attempts to use as debit but the purchase will not work, they should request the charge be re-run as credit
- If the patient is getting gas, please instruct them to go into the store first and request a certain amount be added to the pump. PEX cards generally do not work at the pump
- Cards are not linked to a bank account and funds cannot be loaded onto the cards
- PEX cards do not require activation
- PEX cards do not require a PIN
- Loaded funds can only be used for direct Point-of-Sale (POS) transactions (cannot be used at an ATM)
- **The zip code for all MI Pilot PEX cards (incase a Patient needs to know for a purchase is: 48933)**
- PEX 24/7 Customer Service number is 1-866-685-0898
- This link provides information regarding the use of the PEX cards: https://www.pexcard.com/legal/cardholder-fifththird-guide/

CHESS Health Support:

Available M-F from 8 AM ET to 6 PM ET

Email: support@chess.health (quickest method of support)

Call: 844-692-4377