2019 Washington Street, East
Charleston, WV 25305
Telephone: 304-558-2306
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West Virginia Purchasing Division

The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at *wvOASIS.gov*. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at *WVPurchasing.gov* with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Solicitation Response(SR) | Dept: 0511 | ID: ESR07072600000000105 | Ver.: 1 | Function: New | Phase: Final

Modified by batch , 07/14/2026

Header 4

List View

General Information | Contact | Default Values | Discount | Document Information | Clarification Request

Procurement Folder:	1985877
Procurement Type:	Request for Information
Vendor ID:	VS0000039144
Legal Name:	DIMAGI INC
Alias/DBA:	
Total Bid:	$0.00
Response Date:	07/13/2026
Response Time:	12:59
Responded By User ID:	ush-partnerships
First Name:	Molly
Last Name:	Maher
Email:	ush-partnerships-news@dir
Phone:	6176492214

SO Doc Code:	CRFI
SO Dept:	0511
SO Doc ID:	BMS2600000001
Published Date:	7/9/26
Close Date:	7/14/26
Close Time:	13:30
Status:	Closed
Solicitation Description:	RFI-TRACKING SYSTEM FOR SUBSTANCE USE DISORDER
Total of Header Attachments:	4
Total of All Attachments:	4

	Department of Administration **Purchasing Division** **2019 Washington Street East** **Post Office Box 50130** **Charleston, WV 25305-0130**	**State of West Virginia** **Solicitation Response**

Proc Folder:	1985877
Solicitation Description:	RFI-TRACKING SYSTEM FOR SUBSTANCE USE DISORDER PROVIDERS
Proc Type:	Request for Information

Solicitation Closes	Solicitation Response	Version
2026-07-14 13:30	SR 0511 ESR07072600000000105	1

VENDOR

VS0000039144
DIMAGI INC

Solicitation Number: CRFI 0511 BMS2600000001

Total Bid: 0 **Response Date:** 2026-07-13 **Response Time:** 12:59:36

Comments:

FOR INFORMATION CONTACT THE BUYER
Crystal G Hustead
(304) 558-2402
crystal.g.hustead@wv.gov

Vendor
Signature X **FEIN#** **DATE**

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Tracking System for Substance Use Disorder Providers				0.00

Comm Code	Manufacturer	Specification	Model #
93151507			

Commodity Line Comments:

Extended Description:

Tracking System for Substance Use Disorder Providers
PRICING IS NOT TO BE INCLUDED IN THIS SOLICITATION

Request for Information

West Virginia Department of Human Services

CRFI BMS2600000001

4.2.4. Responses: All responses must be submitted to the Purchasing Division **prior** to the date and time stipulated in the RFI as the opening date. All submissions must be in accordance with the provisions listed in Section 2: Instructions to Vendors Submitting Information.

By signing below, I certify that I have reviewed this Request for Information in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this information for review and consideration;

Dimagi, Inc.
(Company)

Lilian Olson, Managing Director - US Solutions
(Representative Name, Title)

617-852-3867
(Contact Phone/Fax Number)

July 13, 2026
(Date)

Case List Explorer Training

Table of Contents

About This Document

This guide is shared as an example of Dimagi's training materials. It has been sanitized to remove protected client information, and any data or screenshots shown are for illustrative purposes only. Dimagi reuses and localizes training resources such as this one for each implementation, so some details may differ from your project.

How to use Case List Explorer to Troubleshoot and Look-up Case Data

The Case List Explorer enables users to inspect their case data by building a custom-filtered view of their cases.

Purpose of Case List Explorer

This can be the easiest way to troubleshoot specific cases and quickly access case data. Within case list explorer you can narrow your search to find cases using specific case properties.

- L1 and L2 Support Team: including the case_id on a ticket can greatly reduce the time it takes to investigate the issue and ultimately shorten the turnaround time for a response. The support team can use the case list explorer to investigate tickets before escalating it to Dimagi Support.
- Using the case list explorer can help the [State Behavioral Health Agency] Program Team track down case information more quickly, as well as search for certain cases that need further investigation. While reports are extremely helpful for synthesizing data, case list explorer is a faster way to search for cases that need immediate attention.

What Is the Case List Explorer?

The Case List Explorer (CLE) is a built-in CommCare HQ tool that lets data managers and program staff build custom, filtered views of case data — directly in the browser, without needing to export files or write custom reports.

With the CLE you can:

- Find and validate test data during app development

- Identify cases that match very specific criteria (e.g. open cases modified in the last 7 days owned by a specific user)
- Spot data anomalies and outliers
- Do a quick case-level audit before a field visit or data review
- Export a filtered slice of data to Excel for further analysis

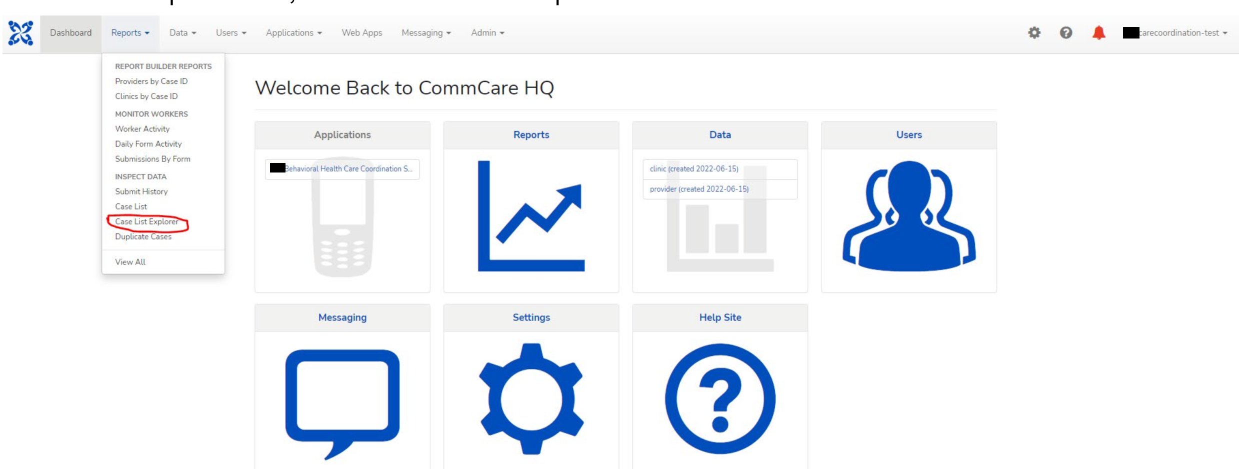
Who is this for?

Any user with [System] State User, [State Behavioral Health Agency] Training Admin or State Admin User roles. Typically data managers, or program supervisors who are already comfortable navigating CommCare HQ but have not used the CLE before.

Accessing the Case List Explorer

To access the Case List Explorer:

1. Head to the domain that you are attempting to search (for example: https://www.commcarehq.org/a/state-carecoordination-uat/dashboard/project/
2. Under the reports tab, select Case List Explorer



Tip — Bookmark it

Once you have the CLE open, bookmark the URL in your browser. The URL includes your project space name, so the bookmark will always take you straight to the right place. You can also save frequently used searches.

What You See by Default

When the CLE loads, it shows all cases in your project space with three default columns: Case Type, Case Name, and Last Modified Date. The "View Case" link in the first column opens the full case detail page for any row.

Filtering Your Cases

The CLE offers two ways to filter: dropdown filters for common criteria, and a search expression box for property-level filtering.

Search Expressions Box

The search box enables you to filter your cases based on the values of their case properties. Use the property name from the Data Dictionary as your search key. The syntax for searching case properties follows the syntax for xpath expressions:

- Available operators: and, or, =, !=, <. <=. >, >=, (,)
- Dates: dates can be filtered with format 'YYYY-MM-DD'. This must include the apostrophes around the date. The date() function is not necessary.

Basic search syntax

What You Want	Example Expression
Search by name (text match)	John OR Jane
Open cases only	Jane AND is:open
Filter on a case property value	current_status = "open"
Combine property filters	current_status = "open" AND client_gender = "woman"

Special Metadata Properties

In addition to your custom case properties, the following system properties can be used in search expressions and added as columns:

Property	Description
@case_id	Unique CommCare ID for the case
case_name	The name of the case
@case_type	The case type
@status	Open or closed status ("open" or "closed")

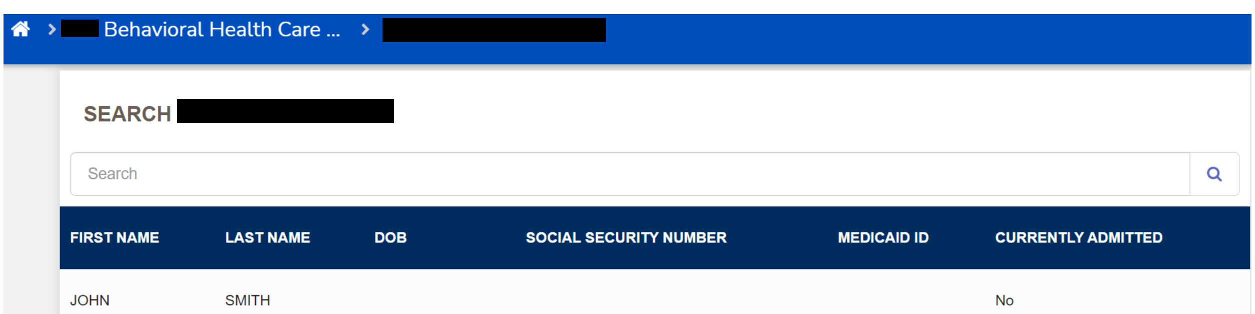
date_opened	Date/time the case was opened (UTC, format: YYYY-MM-DD HH:MM:SS)
last_modified	Date/time of the most recent form submission against this case (UTC)
opened_by_username	Username of the worker who created the case
last_modified_by_username	Username of the worker who most recently updated the case
owner_name	Display name of the current case owner (user, group, or location)
external_id	External ID used for integrations with other systems

Example Expressions

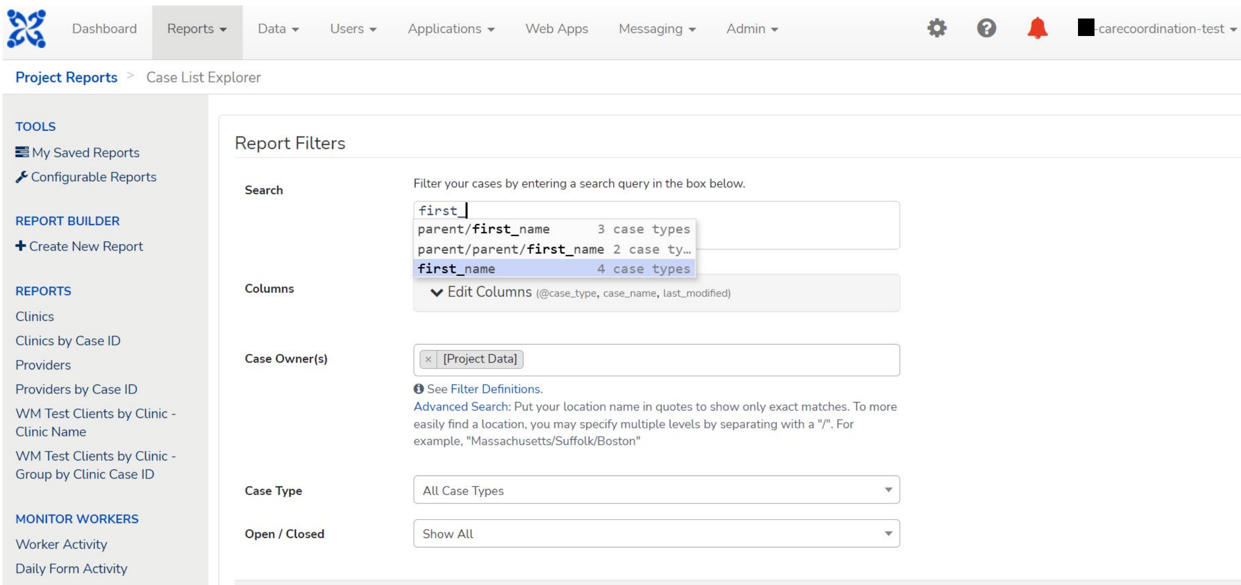
The following are the most common expressions that you will use:

1. SSN = 'XX-XX-XXXX'
2. consent_collected = *'yes'*
3. clinic_type = *'opioid_treatment_provider substance_use_services'*
4. case_type= *'clinic'*
5. @case_id = 'XXXXXXXXXXX'
6. phone_number = *'1234567890'*
7. *referral_status = 'pending'*
8. *service_status ='active'*

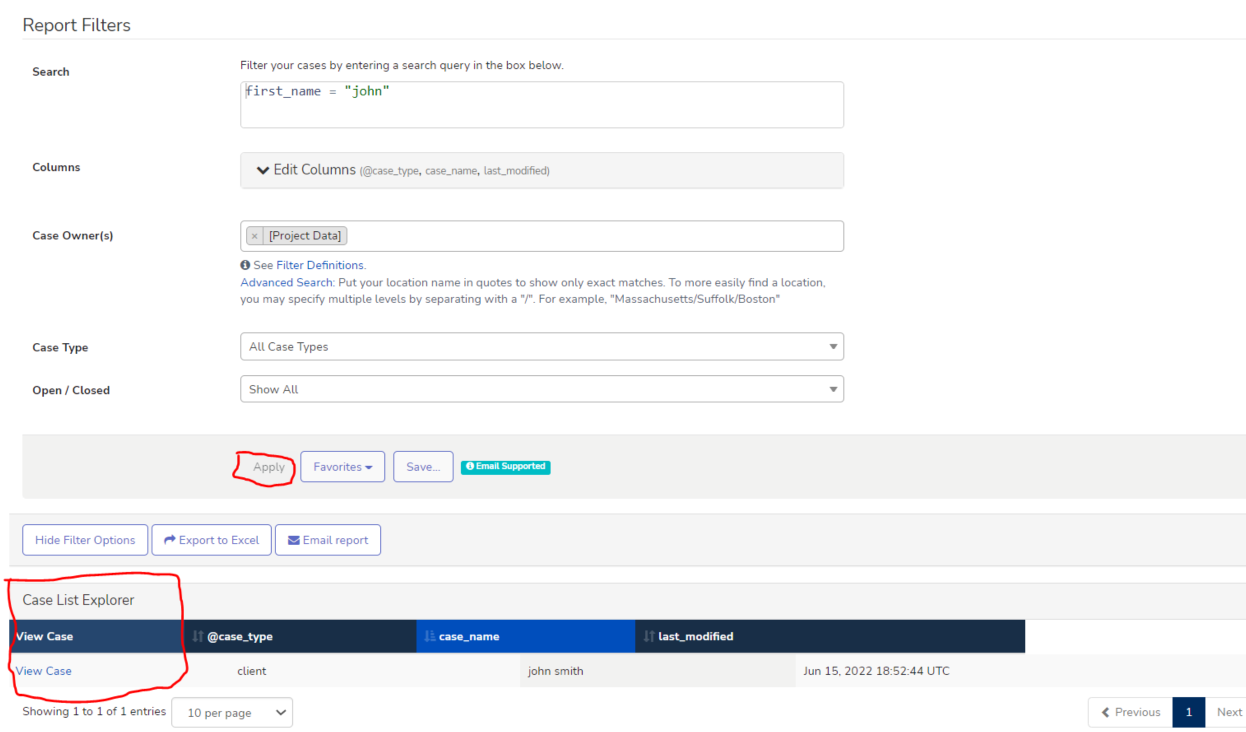
For example:



Take the Client property *first_name= "John"* and search for it in the Case List Explorer. Based on the search query, CommCare will autofill the desired expression.



Once the complete query is executed, select “Apply”. This will produce the desired search result.



Additional Dropdown Filters

These appear at the top of the CLE and are the quickest way to narrow your results:

Filter	How to Use It
Case Type	Only return all or one case type. The equivalent of searching for @case_type = 'provider'. Select one or more case types (e.g. client, referral, clinic,..). If nothing is selected, the search will be done toward all case types. Selecting this filter limits what is shown in the search box and column autocomplete lists.
Case Owners (Groups, Users or location)	Type a username, group name, or location. Type "All Data" to see all cases regardless of ownership. Filters the results by the owner of the case
Open / Closed	Filter to show only open cases, only closed cases, or both. . Uses opened_on and closed_on.

Selecting and Customizing Columns

Click the "Edit Columns" button to open the column configuration panel. From here you can add, remove, or relabel columns.

Adding a Column

1. Click "Edit Columns" to expand the column editor.
2. Click in the Property field. A dropdown of suggested case properties for the selected case type will appear.
3. Start typing the property name (as found in the Data Dictionary) to filter the dropdown.
4. Select the property you want.
5. Optionally, change the Label field to give the column a friendlier display name in your report. This does not affect the underlying property name.
6. Click "**Apply**" to refresh the results.

Default Columns

The CLE always includes these columns and they cannot be removed:

- View Case — a link to the full case detail page (always in the first column)
- Case Type
- Case Name

- Last Modified Date

Column labels are yours to customize
The Label field in column configuration defaults to the property name, but you can rename it to anything that is meaningful to your team. For example, "**pending_list_status**" could be labelled "Pending Admission List Status". This is especially helpful when sharing saved reports with colleagues.

Exporting to Excel

Once you have set your filters and columns, you can export the results to Excel for further analysis.

1. Click the "Export to Excel" button at the top of the CLE.
2. CommCare HQ will process the export and send an email to the address associated with your account.
3. Open the email and click the download link to retrieve the Excel file.

Important: link expires in 24 hours
The download link in the export email is only active for 24 hours. Download the file promptly after receiving the email. If the link expires, run the export again.

The exported file will include exactly the columns you configured in the CLE, with the labels you assigned. Filters you applied (case type, owner, search expression) are reflected in the exported data.

Saving and Reusing Searches

If you configure a view that you will want to revisit — for example, a weekly check of open cases modified in the last 7 days for a specific user group — you can save it.

Saving a Search

1. Set up your filters and columns as desired, then click the "Save" button.
2. Give the saved report a descriptive name.

3. The report will appear in "My Saved Reports" in the Reports section of CommCare HQ.

Using Favorites

Saved reports can be quickly accessed from the "Favorites" dropdown in the CLE. Selecting a favorite automatically loads the saved search criteria, columns, and custom labels.

> **Tip: Name your saves clearly**
> "Women in Pending Admission List (weekly)" is more useful than "My search". Include the purpose, scope, and any time-based intent so colleagues know what the saved report is for.

The Case Detail Page

Once you have selected the case you wish to view, there are a few options to further explore details of that case. This gives you a complete picture of a single case, its current state, all its property values, and the full history of form submissions that have touched it.

What You See on the Case Detail Page

The page is organized into a few key areas:

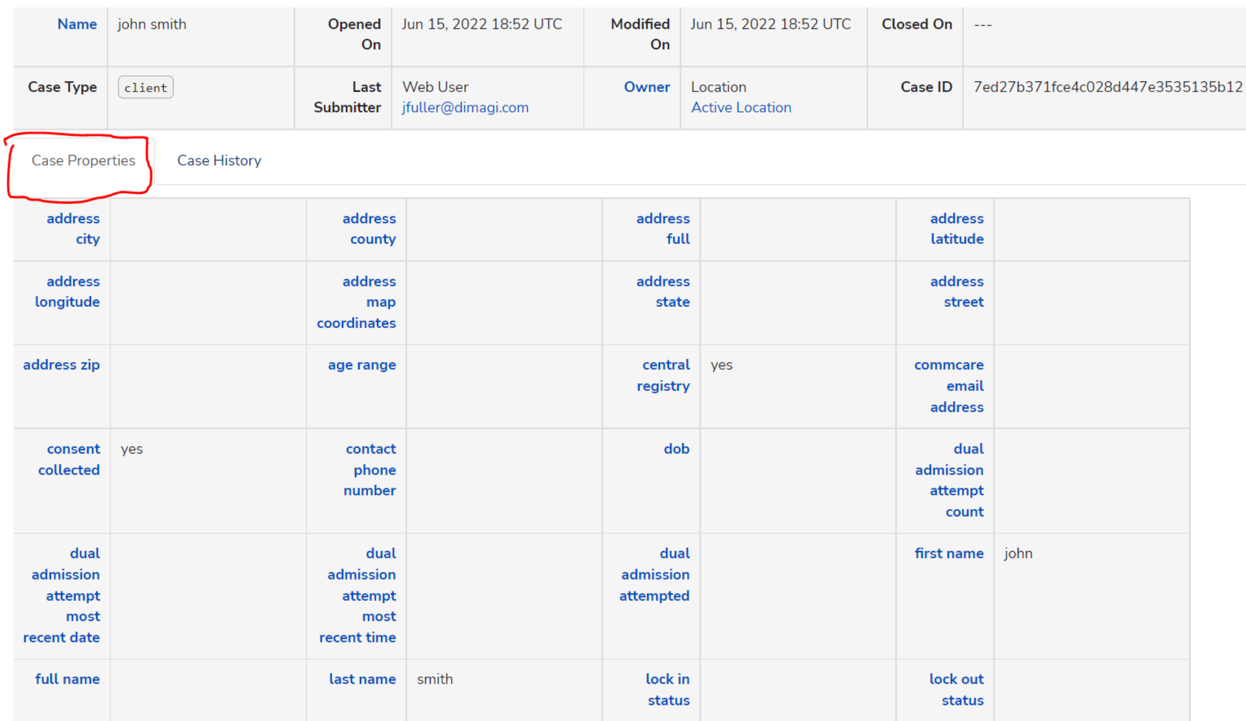
Area	What It Shows
Case Summary (top)	Core metadata: case name, case type, owner, open/closed status, date opened, date last modified, and the internal case ID.
Case Properties	All current property values for the case, organized by any groups defined in the Data Dictionary. Each property name is clickable (see Case Property History below).
Case History	A chronological list of every form submission that has updated this case, with the form name, submitting user, and submission date.

This is read-only

Like the CLE itself, the Case Detail page is a view-only tool. You cannot edit case properties directly from this page. Changes to case data must be made through the Application itself or via Case Import.

Case Properties

These are case properties that are filled in from questions in the Admit Client form and populated here. This is a quick way to view responses from the form and see which questions were completed. When searching in case list explorer, any of the case properties can be used to search by.



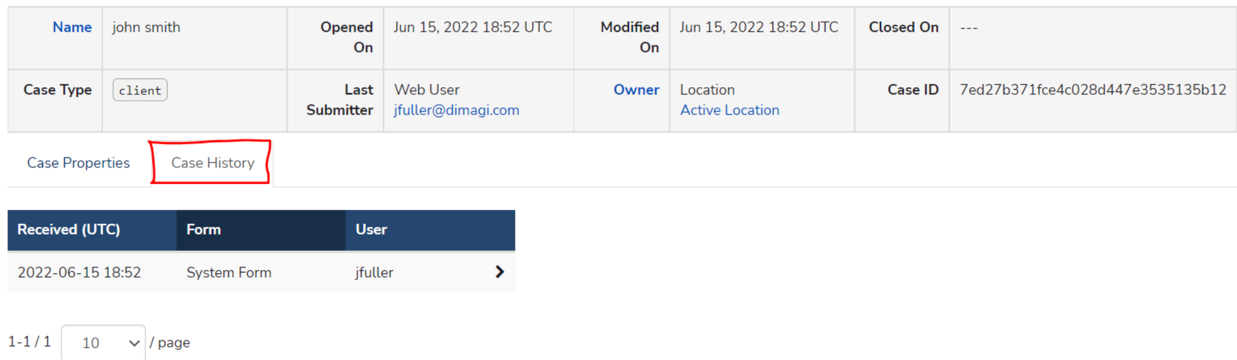
Name	john smith	Opened On	Jun 15, 2022 18:52 UTC	Modified On	Jun 15, 2022 18:52 UTC	Closed On	---
Case Type	client	Last Submitter	Web User jfuller@dimagi.com	Owner	Location Active Location	Case ID	7ed27b371fce4c028d447e3535135b12

Case Properties | Case History

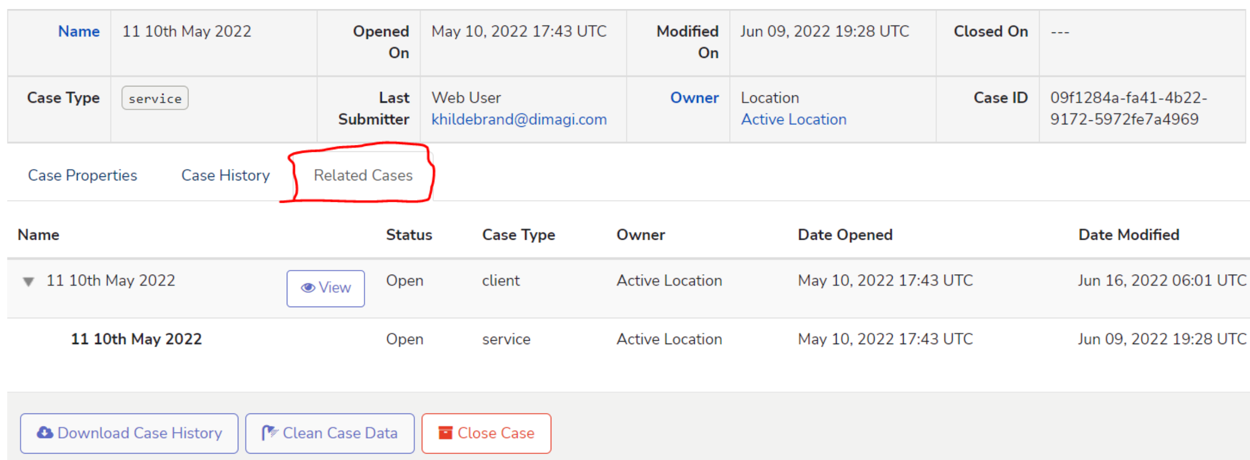
address city		address county		address full		address latitude	
address longitude		address map coordinates		address state		address street	
address zip		age range		central registry	yes	commcare email address	
consent collected	yes	contact phone number		dob		dual admission attempt count	
dual admission attempt most recent date		dual admission attempt most recent time		dual admission attempted		first name	john
full name		last name	smith	lock in status		lock out status	

Case History

This section allows you to see the date the form was completed, which form(s) was completed, and which system user worked on that form.



Related Cases



This section will show if this case is related to any other case - i.e. what client case a service case is connected to.

Navigating Back to the CLE

Use your browser's back button to return to your CLE results. Your search filters and column configuration will still be in place.

Using the Data Dictionary to Find Case Properties

Before you can filter or add columns in the CLE, you need to know the exact name of the case property you want to use. The Data Dictionary is the best place to look this up.

What Is the Data Dictionary?

The Data Dictionary is a registry of all case types and their case properties in your project. It documents the property name (exactly as it is stored in CommCare), along with optional labels, descriptions, and data types.

- [External] [System] Data Dictionary
- [Shared] [System] Data Dictionary

How to Navigate the Data Dictionary

1. Review the first tab ("Case Types" or "Record Types") for a description of the different types of cases used in the application and to identify which case you're interested in.
2. Navigate to the tab with the name of the case type you're interested in.
3. The first column shows the case property names. These are the names you will use in the CLE.

Why this matters

The CLE uses the internal property name — not the label shown to mobile workers. For example, a question labelled "Mother's Age" in the app might be stored as "mother_age_years". Always copy the name from the Data Dictionary to avoid typos.

Reading the Data Dictionary

Column	What It Tells You
Property	The exact property name to use in CLE searches and column selections
UI Label	A human-readable display name (may differ from the stored name)
Description	Notes on what the property captures, valid values, or relationships to other properties
Data Type	The expected format: Plain, Date, Number, Multiple choice, GPS, Phone, etc.
Allowed Values/Backend Values	Details about how the data type is formatted, for example, the syntax of a date or the list of valid multiple choice values. This will help you format your search.

Tips, Limitations, and FAQs

Key Limitations to Know

- Read-only — you can view cases but cannot edit them from the CLE.
- One case type at a time — cross-case-type analysis is not possible in a single CLE view.
- Export link expires in 24 hours — download promptly after receiving the email.
- Performance — very large projects with hundreds of thousands of cases may see slower load times.

Frequently Asked Questions

Q: The property I want is not in the column dropdown. What should I do?

The dropdown is filtered to properties known for the selected case type. If the property is not appearing, make sure you have selected the correct Case Type filter. If the property was never saved to any case, it will not appear — check the Data Dictionary to confirm it exists. You can also type the property name directly into the Property field rather than relying on the dropdown.

Q: My search returned no results but I know the cases exist. What went wrong?

Check that (a) you have selected the right Case Type, (b) the Case Owner filter is not limiting to a user who does not own those cases — try "All Data", and (c) the Open/Closed filter is set correctly. Also double-check the exact property name and value in your search expression — the match is case-sensitive for property values.

Q: I need to compare data across two case types. How do I do that?

The CLE does not support cross-case-type views in a single query. The best approach is to run separate CLE exports for each case type, then join them in Excel using a shared key (like a case ID or external ID).

Q: Can I share my saved report with a colleague?

Saved reports in "My Saved Reports" are personal to your account. To share a specific view with a colleague, share the URL from your browser when the filters and columns are configured so they can then save it themselves.

Q: Where can I learn more about advanced search syntax?

CommCare has a dedicated Case Query Language reference page: [Case Query Language — CommCare Help Site]

Quick-Reference Cheat Sheet

Task	How
Navigate to CLE	Reports > Inspect Data > Case List Explorer
Find a property name	Data > View All > Data Dictionary > select case type
Filter by case owner	Type username or group in "Groups or Users" box; use "All Data" to remove owner filter
Filter by property value	Enter property_name = "value" in the Search box
Add a column	Click "Edit Columns", select property, optionally rename label
Export results	"Export to Excel" — check email for download link (expires 24h)
Save a search	"Save" button > name it > access later via My Saved Reports

[State Behavioral Health Agency] Provider Services Application

User Guide for Clinic and Provider Users

Last Updated: Feb. 01, 2023

About This Document

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245 Main Street, 2nd Floor

Cambridge, MA 02142, United States

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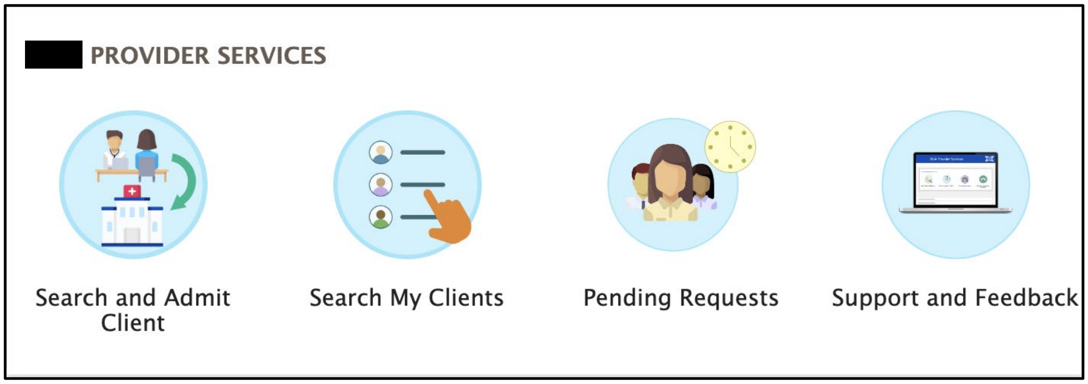
Cambridge, MA 02142, United States

CommCare Basics

[State Behavioral Health Agency] Provider Services [System] is a secure, web-based application for Opioid Treatment Providers (OTPs) in [State] to register clients who are receiving Medicated-Assisted Treatment (MAT) for monitoring by the [State Behavioral Health Agency]. This [System] User Guide assists “Clinic” users in setting up their account, navigating the system, troubleshooting and escalating issues.



[State Behavioral Health Agency] Provider Services also includes an analytics platform consisting of several integrated data tools including [Snowflake](#) for data storage and processes, [Tableau](#) for data visualization, and [Excel](#) for bulk data entry used to create reports on [System] data. This application is accessible to authorized [State Behavioral Health Agency] employees, as well as “Clinic” and “Provider” users.

Logging in and getting started

Setting up your account

Confirming Account via Email

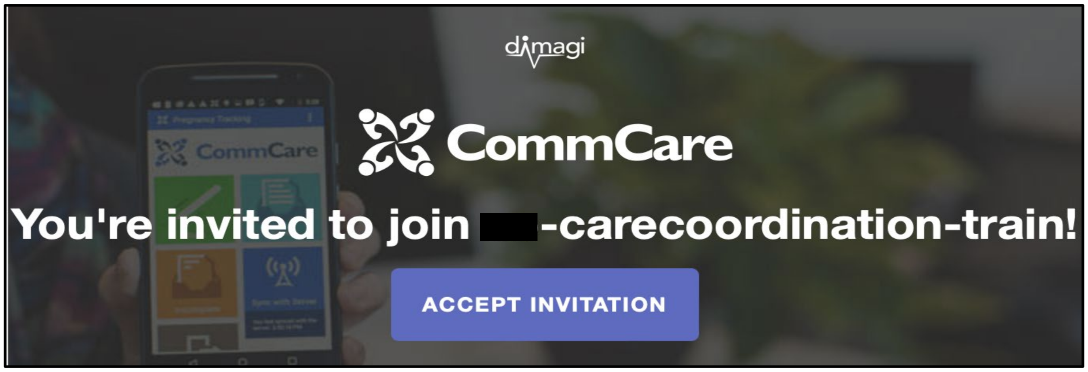
To use the [System], you will need access to CommCare, a web-based platform that hosts [State Behavioral Health Agency] Provider Services.

Initially, you will receive an email notification inviting you to join the Training project space (state-carecoordination-train). This email comes from commcarehq-noreply@dimagi.com. If you cannot find this email in your mail Inbox, please look in your spam folder. If it is not either in your Inbox or spam folder, please contact [provider support email] for further assistance.

You should not enter PHI in the training environment.

Before you officially begin using the [System], you will receive a second email notification inviting you to join the Production (live) project space (state-carecoordination). This project space contains real data and protected health information (PHI).

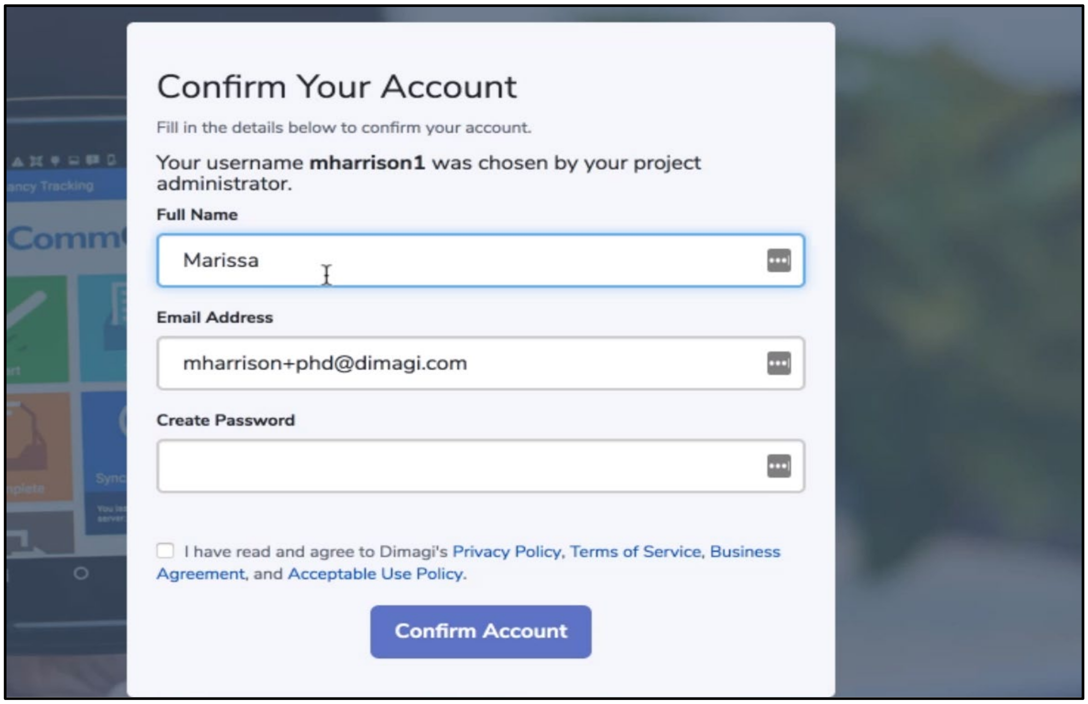
You will have 30 days to accept each invite from CommCare. Open the email from commcarehq-noreply@dimagi.com. Click the purple 'Accept Invitation' button in the body of the email, as pictured below.



If the invitation has expired (more than 30 days passed since the email was sent to you) please contact [provider support email] for further assistance.

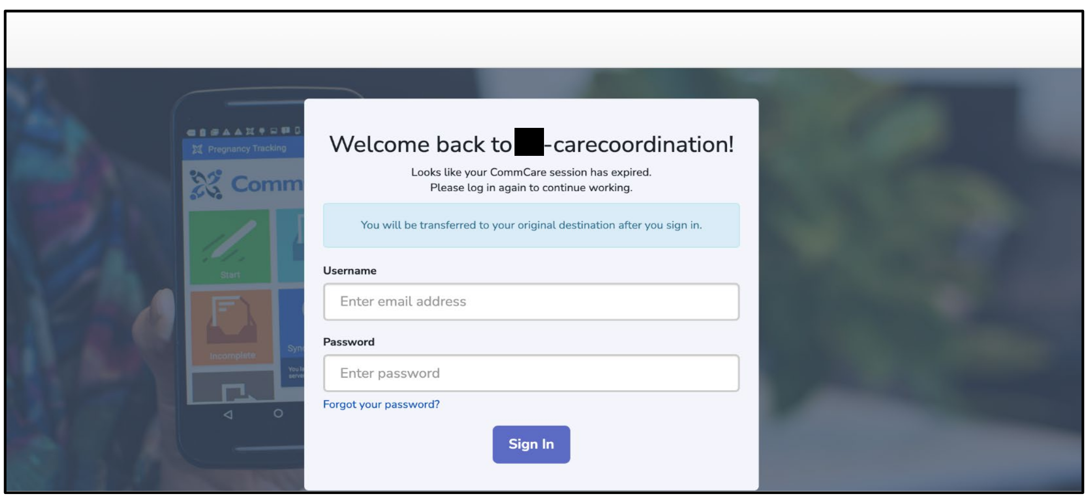
Finalize Account Details

Clicking the "Accept Invitation" button in the email will open a new tab in your browser. This tab contains a form like the one pictured below. Enter the information requested in the form to finalize the details of your account. Create your password, then click the purple 'Confirm Account' button. Then you will see a new window where you will be prompted to log in.



System Log-In

We recommend that you bookmark the login page (https://www.commcarehq.org/a/state-carecoordination/login) for easy access going forward. Enter the account credentials that you just created into the login window, then click ‘Log in’.

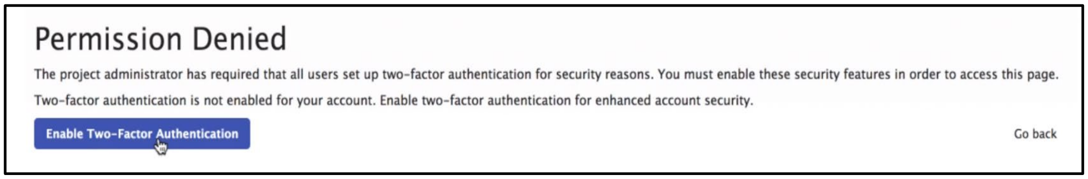


245 Main Street, 2nd Floor
Cambridge, MA 02142, United States

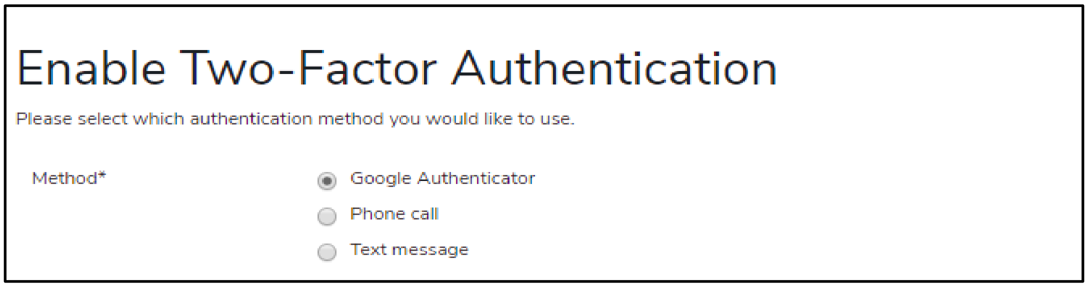
Setting up Two Factor Authentication

For additional security measures you are required to use two-factor authentication (2FA) when accessing the production environment. 2FA is a measure to strengthen security by requiring two methods to verify your identity (i.e. login credentials and an SMS code).

After you finish your initial login, you will see a window like the one pictured below. To set up 2FA, click the button labeled "Enable Two-Factor Authentication" in this window.



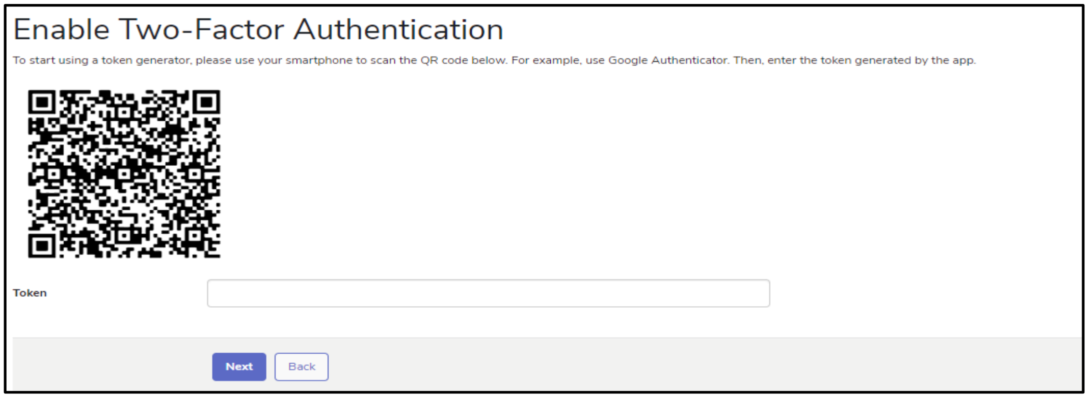
- Clicking that button will bring up a different window, as pictured below. This window offers you a choice of mechanism for authenticating yourself to the system each time you login. You may choose between
  - Receiving a text message
  - Receiving a phone call, or
  - Using an app that you can load on your smart phone that is called the "Google Authenticator."



Once you set up 2FA, you will also receive a series of backup codes. **You should save the backup codes to a secure location.** These can be used in the event that you lose access to your second mechanism of authorization.

Each time you log into [State Behavioral Health Agency] Provider Services, you will be asked for a token that you will obtain using the mechanism that you choose. A token is a secret series of numbers, specific to you, that change every few minutes.

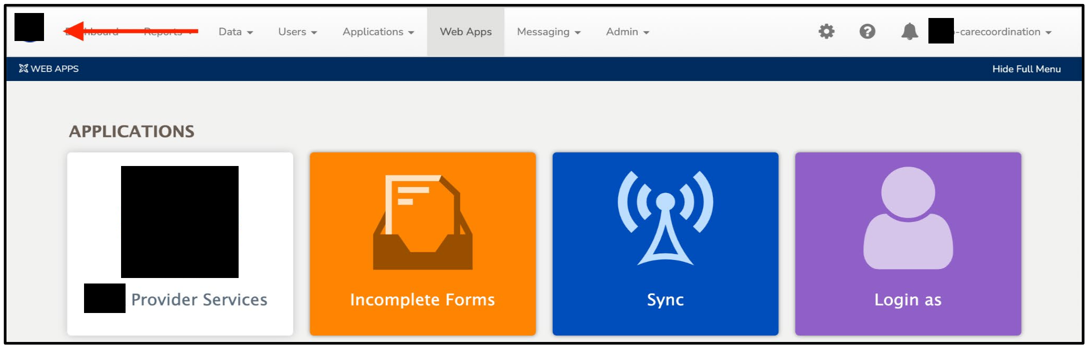
- You will submit the login token you received in the text input field labeled “Token.” This submission will complete the Two-Factor Authentication set-up process and will log you into the system.



NOTE: **DO NOT** USE THE QR code in the picture below to complete your 2FA. Only use the QR code that appears in the 2FA window on your screen.

Access the Application

Click the navigation item at the top of the screen labeled, “Web Apps” to be directed to the application home screen. If the navigation is hidden, you may have to click “Show Full Menu” in the top right corner of the screen. Select the icon labeled, “[State Behavioral Health Agency] Provider Services'' application to start using the app.

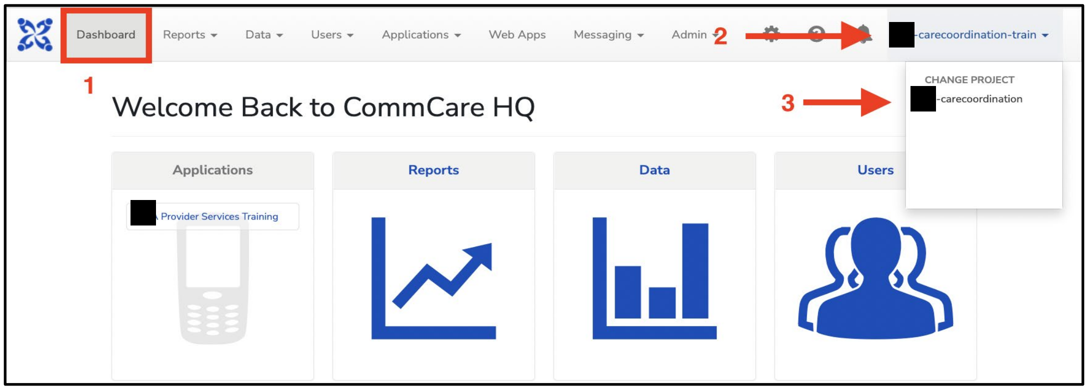


Navigating CommCare Environments

As mentioned above, you will have received an invitation to the CommCare training environment and production (i.e. live) environment upon setting up your account. The production environment is where the live [System] exists with real client data and PHI. The training environment is where you can familiarize yourself with the application and its workflows.

It’s important to ensure that you are in the correct environment when entering PHI and accessing the [System]. You can navigate from one environment to another using one of two methods:

1. Clicking one of the links below (this will work if you have accepted the invitations to both environments)
    - Production environment: [link]
    - Training environment: [link]
2. From the desired environment
    - (1) Navigate to the Dashboard in your CommCare view
    - (2) Select the dropdown in the top right corner of the screen.
    - (3) Select the environment that you would like to navigate to



Support

Submitting a support request

Please navigate to the [State Behavioral Health Agency] Provider Services Helpdesk Ticket Submission Form. This form will require the necessary information to assist with any questions, concerns, issues, and suggestions.

If you prefer to utilize email to voice your concerns or issues send an email to [provider support email] using the following template:

Contact Information: Your organization, email address, and alternate contact information (if desired to include)

Subject: Support Request <summary of issue>

Body:

- Summary: <complete detailed summary of issue>
- Reproduction Steps: <steps to reproduce the issue>
- Issue Location: <menu where the error or blockage occurred>
- Priority: <priority of issue - impact - is it blocking your work - data issue - #users affected>
- (If applicable) Work Around: <description of work around>
- Reproduction Steps: <steps to reproduce the issue>
- (If applicable) Errors Messages: <copy and paste exact error>
- Screenshot/Attachments of Error: <visual evidence of issue>
- Additional Context: <additional notes> <screenshots> <timeline>

[redacted]

[redacted] Provider Services Helpdesk Ticket Submission Form

Welcome to the helpdesk support ticketing system for the [redacted] Provider Services system that includes the new [redacted]. We are committed to addressing any concerns, issues, or suggestions to improve the system and customer experience.

Your organization *

Enter your name

Email address *

Enter your email address

Alternate contact information

Enter your answer

In as much detail as possible, please describe your pending concern(s), issue(s), or suggestion(s). Please be as specific as possible. *

Enter your answer

In the best way you can, tell us how you reached you step by step *

Each menu you have navigated through to the point your reached your block or error.

Enter your answer

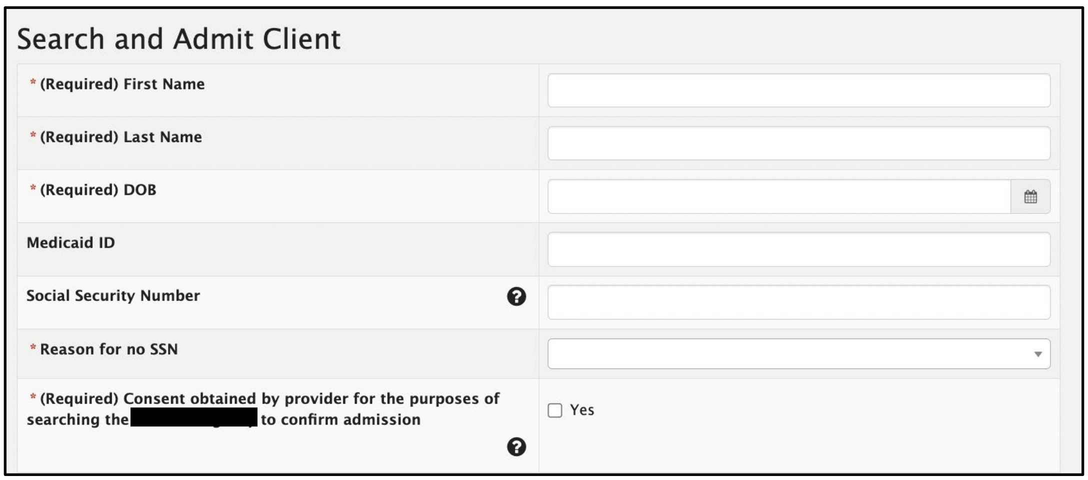
After you have submitted the form, it will be reviewed by the [State Behavioral Health Agency] Support Desk within 2 hours of submission. Please standby for any additional questions, information, or updates. The email inbox is monitored from 8 - 5 pm MT, Monday - Friday.

Using [State Behavioral Health Agency] Provider Services

Case Search and Case Lists

Case Search (Search and Admit Client, Search My Clients)

Case Searches allow users to search across client data using the search criteria listed. In some cases, using a case search is required to view case data. Search and Admit Client the primary case search module within the [System].



Tips for using Case Search:

- Fields with a red asterisk and the word “(Required)” indicate fields that must be completed in order to submit a search.

Case Lists (Search My Clients, Pending Requests)

Case Lists allow users to find and view data about a client. Different case lists are visible depending on your user permissions in the application (see [Workflows by user types](#) section below).

SEARCH MY CLIENTS

Search

LAST NAME	FIRST NAME	DATE OF BIRTH	SOCIAL SECURITY NUMBER	MEDICAID ID	CURRENTLY ADMITTED
Altoid	Suzanne	Mar 05, 1984	123-45-6789	L987654	Discharged

Tips for using Case lists:

- The column headings first name, last name, and DOB can be reordered alphabetically or numerically by clicking the column headings.
- The search bar above a list allows users to search for identifying terms to quickly isolate a client or clinic, or set of clients or clinics, matching specific criteria. The search bar does NOT return results for cases that are not already in the case list.
- At the bottom of Search My Clients, there is a button "Filter Search My Clients". Users can select this to conduct a case search across the clients in their Search My Clients list.

First Name	
Last Name	
Social Security Number	
Medicaid ID	
Date of Birth	
* (Required) Admission Status	Active
Admission Date	
Discharge Date	

Syncing

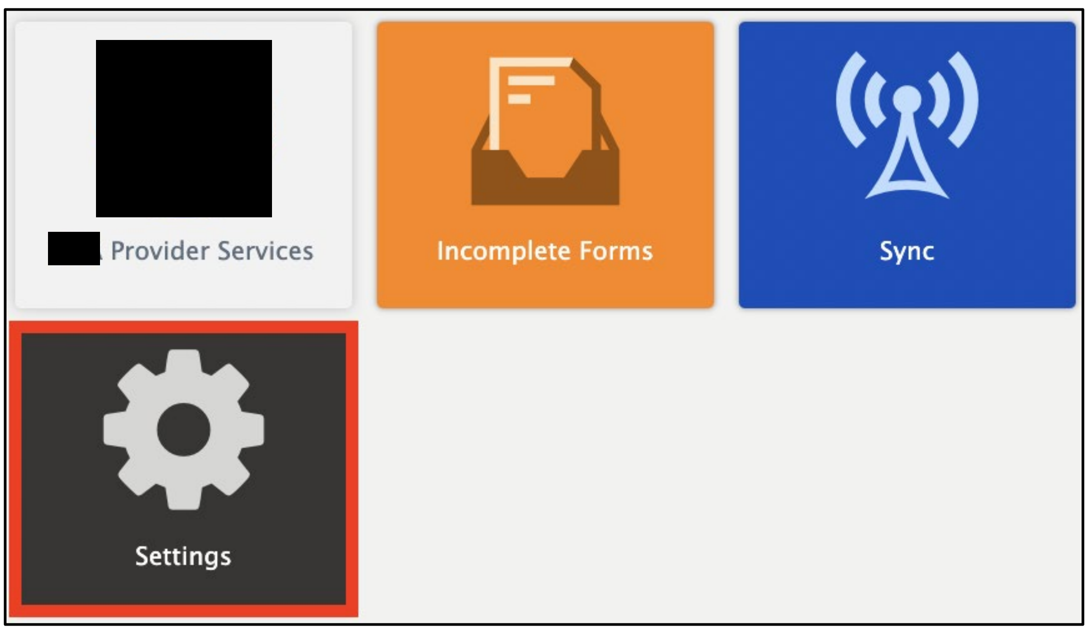
Because multiple people can access the [System] at a time, it is necessary to use the sync feature to ensure that your data is up-to-date with the most recent updates in the system. You can use " Sync" if you notice a discrepancy in the system. However, CommCare automatically syncs for you every 5 minutes and every time you submit a form.

Troubleshooting

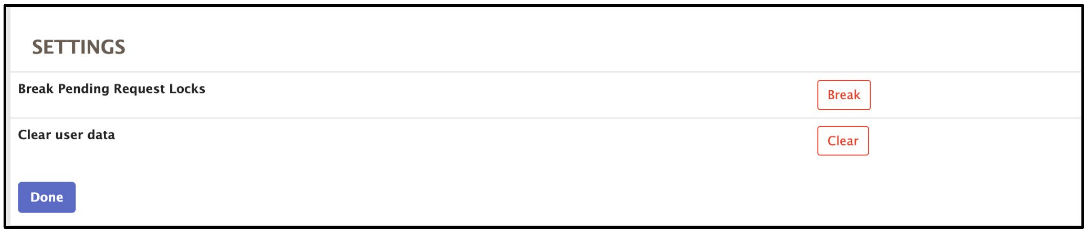
Clearing User Data and Breaking Lock Requests

If you are encountering an error message or seeing a discrepancy in the data and have already tried to resolve your issue by syncing the application, you can try clearing user data or breaking lock requests as a second line of troubleshooting.

In the Web Apps home screen, select the Settings button.



Next, click “Break” to break pending request locks or “Clear” to clear user data. This ensures that your user is aligned with the current system and that any processes that were causing an issue are cleared.



Workflows by user type

The [System] is configured differently for the various users within the system.

“State” users are part of the [State Behavioral Health Agency] team. These users review and respond to requests from clinic and provider users including admission reviews, client information updates, and lock statuses. They can admit and discharge clients, update lock statuses, resolve duplicates, and edit client information.

“Clinic” users have permissions to access one clinic location. “Clinic” users can use the application to admit a client when there is no conflict, (conflict ex: client currently admitted or has an active lock status) request an admission when there is a potential conflict, discharge clients admitted to their location, request a lock-in/lock out status, request an update to a client record, and view clients at their location.

“Providers” users have the same permissions as “Clinic” users except that they can be assigned to multiple clinic locations.

Email Notifications

All users are notified via email (from provider support email) when a change has been made in the app that requires their attention or for them to take an action. Emails will be sent to the email used for log in. Email notifications will occur to “State”, “Clinic” and Provider” users in the event of:

- Admission
    - "State" users will receive an email when a new admission request is submitted.
    - "Clinic" users will receive an email when an admission determination has been made for a pending request.
- Lock status

    - "State" users will receive an email when a new lock status request has been submitted.
    - "Clinic" users will receive an email when a determination has been made for a pending lock in/out request.
- Client information update request
    - "State" users will receive an email when a new client information update request has been submitted.
    - "Clinic" users will receive an email when a determination has been made for a pending client information update request.
- Update Admission Information Request
    - "State" users will receive an email when a new update admission information update request has been submitted.
    - "Clinic" users will receive an email when a determination has been made for a pending update admission information update request.
- Admission & discharge on the same date
    - "State" users will receive an email when a client is admitted and discharged from a clinic on the same date.
- Retroactive admission
    - "State" users will be notified of when a client is admitted with an admission date in the past.

Email notifications requiring user follow-up will include a smart link with accompanying instructions prompting the user to take action. Below are examples of email notifications generated from:

- An admission request event (triggered by a “Clinic” user, received by a “State” user)

> A admission request was submitted by Aurora Therapy Center LLC - 13th Ave on 9/5/2022, 2:34 PM. Please log-in to [redacted] Provider Services https://www.google.com/url?q=https://www.commcarehq.org/a/[redacted] dev/app/v1/541f3359a4c642cb9f74db9a692d872b/state_pending_requests/?case_id%3D4ddda8c5-b47c-4d30-903f-0142283b050b&source=gmail-imap&ust=1663007665000000&usg=AOvVaw0qEy3bJkYwKP-X6VyT3WFW to review the admission request.
> —
> Thank you for using [redacted] Provider Services. If you have any questions, please email [redacted]

- An admission determination event (submitted by a “State” user, received by a “Clinic” user)

The admission request submitted on 9/2/2022, 3:53 PM has been reviewed. Please log-in to [redacted] Provider Services https://www.google.com/url?q=https://www.commcarehq.org/a/[redacted]/v1/541f3359a4c642cb9f74db9a692d872b/clinic_my_clients/?case_id%3D(&source=gmail-imap&ust=1662753377000000&usg=AOvVaw34nF2FHRybhD_g8EybglKZ?) to review the status of the admission request.

—

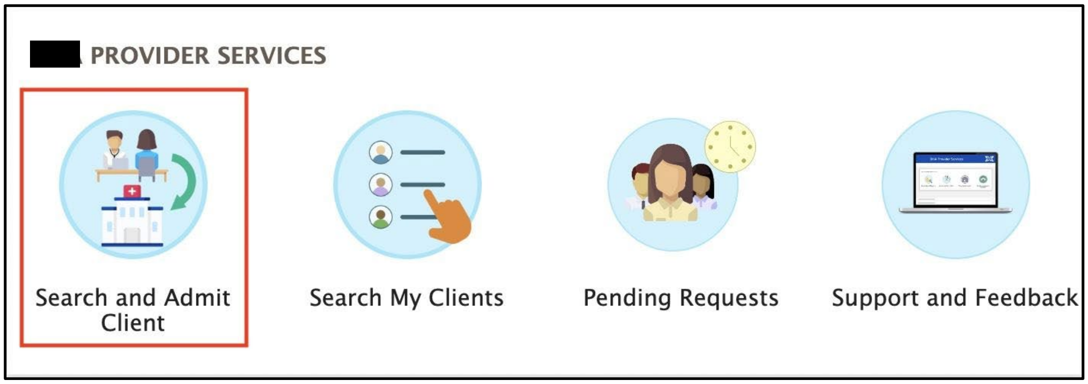
Thank you for using [redacted] Provider Services. If you have any questions, please email [redacted]

Admitting/Discharging a Client

Admitting a client

Description: Admitting a client that is not currently admitted to the [System] and does not have an active lock status.

1. Select "Search and Admit Client"



2. In the Search and Admit Client screen:

Search and Admit Client

* (Required) First Name	
* (Required) Last Name	
* (Required) DOB	
Medicaid ID	
Social Security Number	
* Reason for no SSN	
* (Required) Consent obtained by provider for the purposes of searching the [redacted] to confirm admission	☐ Yes

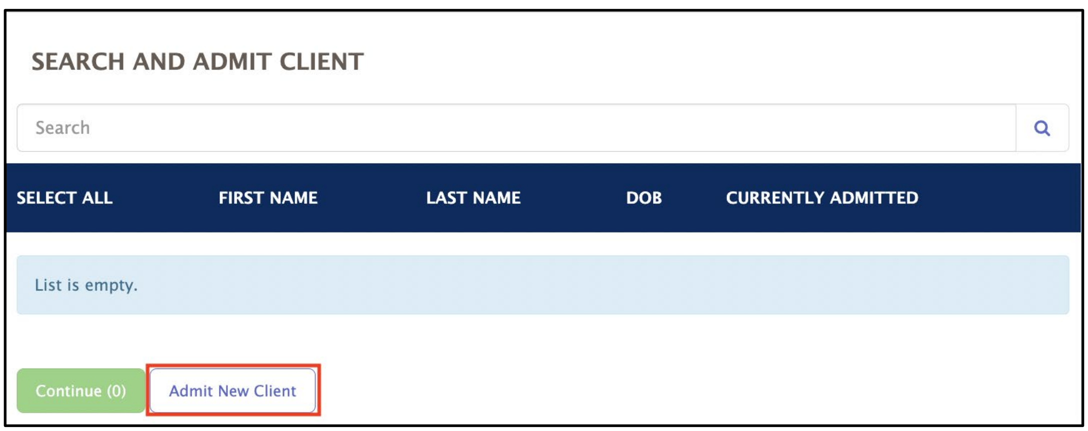
a. First, you must check the [System], to see if your client is currently admitted at another location or has an active lock status. Enter as much information as you have about the client including First Name, Last Name, DOB, (optional) Medicaid ID, and (optional) Social Security Number. Use the following formats:

   i. First Name: Use the whole name (not an abbreviated version)
   ii. Last Name: Use the whole name (not an abbreviated version)
   iii. DOB: YYYY-MM-DD / YY-MM-DD / MM-DD-YY / MM-DD-YYYY
   iv. Medicaid ID: 1 letter followed by 6 numbers (eg., a123456)
   v. Social Security Number: XXX-XX-XXXX (**must include dashes**).
   vi. If you do not include a SSN, you will be prompted to provide a reason

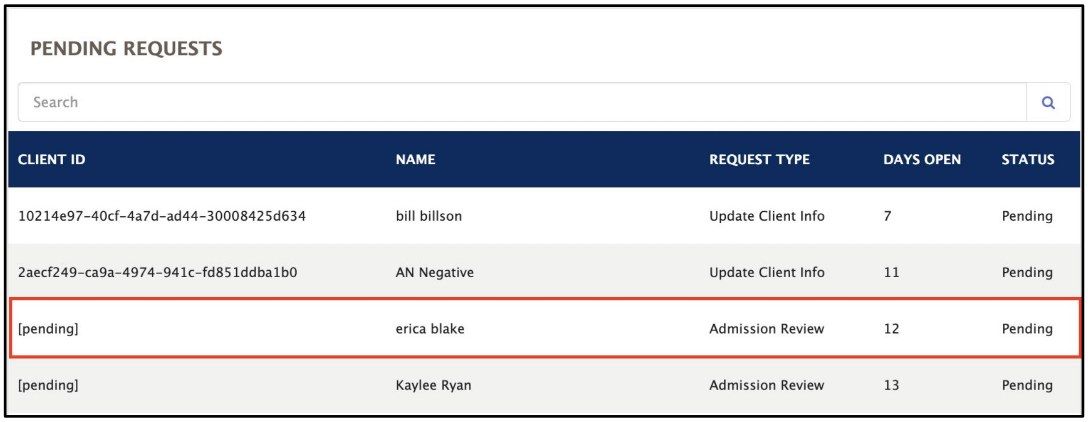
b. Before performing the search, you must confirm that you have received consent: "Consent obtained by the provider for the purposes of searching the [System] to confirm admission" and select “YES”

c. Submit search by clicking Submit.

3. If no results are returned, that means there are no active records in the system that match the information you entered. Select the Admit New Client button.



a. If one or more client records are returned, you will be taken to the Request Admission Review form to proceed with the admission request (proceed to [Request an Admission](#) for further instruction).

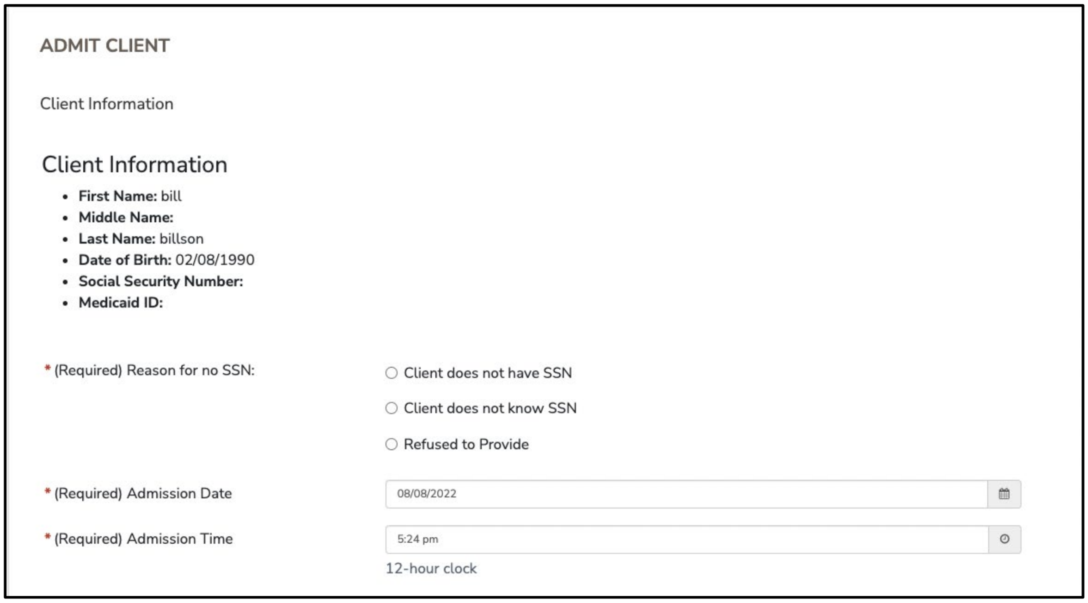


PENDING REQUESTS

Search

CLIENT ID	NAME	REQUEST TYPE	DAYS OPEN	STATUS
10214e97-40cf-4a7d-ad44-30008425d634	bill billson	Update Client Info	7	Pending
2aecf249-ca9a-4974-941c-fd851ddba1b0	AN Negative	Update Client Info	11	Pending
[pending]	erica blake	Admission Review	12	Pending
[pending]	Kaylee Ryan	Admission Review	13	Pending

4. Complete Admit Client form. Please note that users with the “Clinic” user permissions can only admit to one location. Users with the “Provider” permissions can admit to multiple locations.



ADMIT CLIENT

Client Information

Client Information

- **First Name:** bill
- **Middle Name:**
- **Last Name:** billson
- **Date of Birth:** 02/08/1990
- **Social Security Number:**
- **Medicaid ID:**

* (Required) Reason for no SSN: ○ Client does not have SSN ○ Client does not know SSN ○ Refused to Provide

* (Required) Admission Date: 08/08/2022

* (Required) Admission Time: 5:24 pm

12-hour clock

   a. You can access a receipt of admission by clicking on the client's name from the Search My Clients module and then clicking on the form labeled, “Admit/Discharge Summary.”

5. Newly admitted clients will appear in Search My Clients list with Currently Admitted status set to *Yes.* Note that the Currently Admitted column reflects the client’s status at the clinic where the user is provisioned.

SEARCH FOR CLIENTS

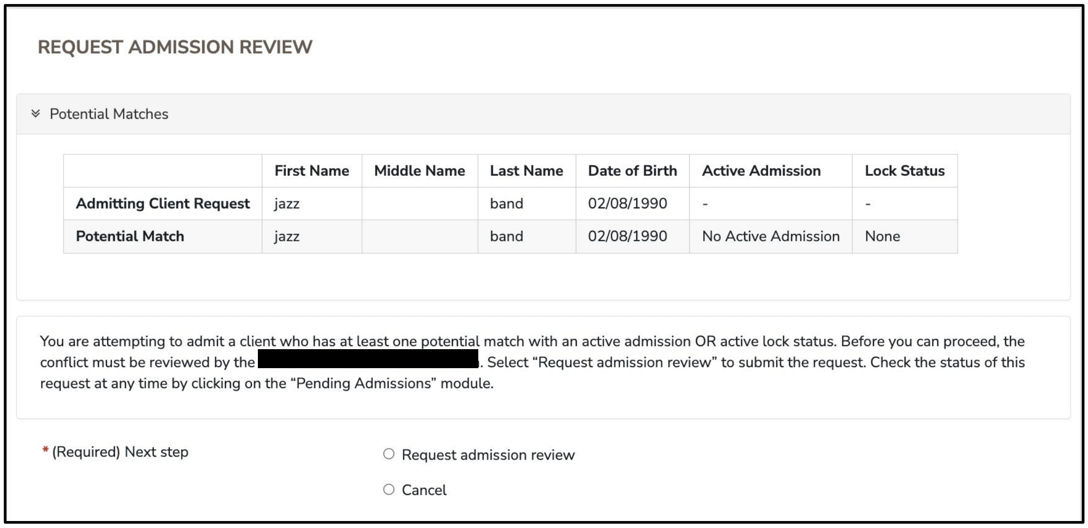
Search

FIRST NAME	LAST NAME	DOB	SOCIAL SECURITY NUMBER	MEDICAID ID	CURRENTLY ADMITTED
bill	billson	Feb 08, 1990			Yes
bill	billson	Feb 08, 1990			No

Request an admission

Description: When you attempt to admit a client that matches a record for a client currently admitted to the [System] or with an active lock status, you must request an admission from [State Behavioral Health Agency]. Continuation of 3A Admitting a Client (i.e. if a client is returned from a search using “Search and Admit”).

1. In the Request Admission Review form, review the potential matches and complete the “(Required) Next Step” field and submit the form for [State Behavioral Health Agency] review by clicking Submit.



REQUEST ADMISSION REVIEW

Potential Matches

	First Name	Middle Name	Last Name	Date of Birth	Active Admission	Lock Status
Admitting Client Request	jazz		band	02/08/1990	-	-
Potential Match	jazz		band	02/08/1990	No Active Admission	None

You are attempting to admit a client who has at least one potential match with an active admission OR active lock status. Before you can proceed, the conflict must be reviewed by the [redacted]. Select “Request admission review” to submit the request. Check the status of this request at any time by clicking on the “Pending Admissions” module.

* (Required) Next step

- Request admission review
- Cancel

2. The client will now appear in the Pending Request case list with a status of “Pending.” Upon submission, the state user will receive an email notifying them that a request has been submitted for review.

PENDING REQUESTS

Search

CLIENT ID	NAME	REQUEST TYPE	DAYS OPEN	STATUS
[pending]	jazz band	Admission Review	0	Pending
[pending]	erica blake	Admission Review	4	Pending
10214e97-40cf-4a7d-ad44-30008425d634	bill billson	Update Service Info	5	Pending

3. Once the admission is approved or rejected, the clinic user will receive an email notification to alert them that a determination has been made. The admission will appear in the Pending Request list with a new status of “Approved” or “Denied” for 24 hours.

PENDING REQUESTS

Search

CLIENT ID	NAME	TYPE	ACTION	DAYS OPEN	STATUS
[pending]	jazz band	Client	Admit	0	Approved
04af0cc4-659c-4c4c-9d4f-1eec8a54ee26	Jed Walker	Client	Update	0	Approved
46f7adbe-4287-467c-be74-ad1d124ea0b6	Chandlyn Smyth	Lock Status	Create	0	Approved

4. To finalize the admission, select the approved pending admission and you will be taken to the Pending Admission Management form

PENDING ADMISSION MANAGEMENT

Admission Summary

- **Client Name:** jazz band
- **Date of Birth:** 02/08/1990
- **Social Security Number:** -
- **Medicaid ID:** -
- **Admission** [redacted]
- **Controlled Dispensed Medication:** -

Status

The admission request for *jazz band* **was approved** ✅.

The [redacted] (state.user) determined that the requested client **did have other client records** and therefore the records were merged.

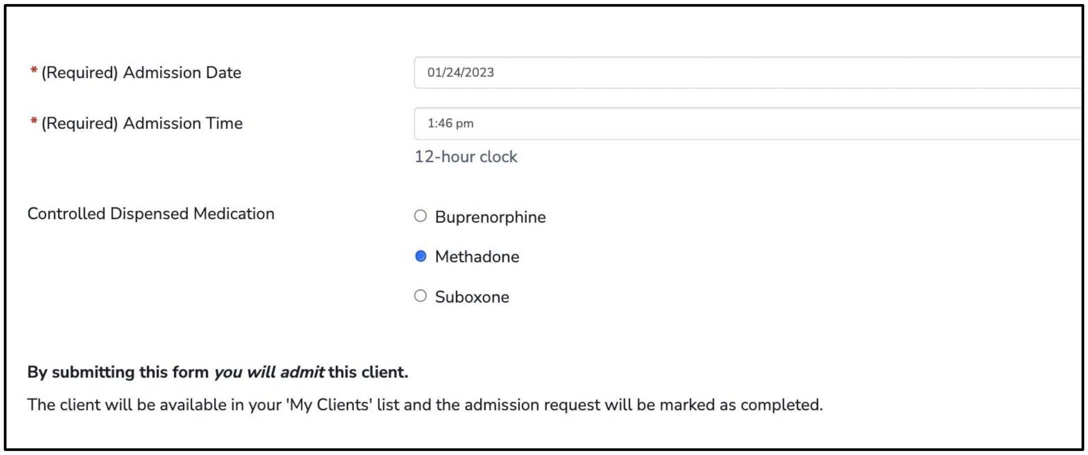
Please choose if you would like to finalize or cancel this pending admission.

Next Action

* (Required) Submit admission of *jazz band*?

- ○ Yes, complete this request and admit them to [redacted]
- ○ No, cancel this Pending Admission
- ○ No, keep this Pending Admission open

5. Complete the required questions in the Next Action.
    a. If you select Yes to complete the admission, complete the admission questions



* (Required) Admission Date: 01/24/2023

* (Required) Admission Time: 1:46 pm

12-hour clock

Controlled Dispensed Medication

- ○ Buprenorphine
- ● Methadone
- ○ Suboxone

By submitting this form *you will admit* this client.

The client will be available in your 'My Clients' list and the admission request will be marked as completed.

6. Submit the form to finalize your admission.

Discharging a Client

Description: Discharging a client that is currently admitted to an OTP clinic within the [System].

Please note that users with the “Clinic” User permissions can only discharge from one location. Users with the “Provider” permissions can discharge from multiple locations.

1. Navigate to the Search My Clients list

2. Navigate to the desired client record

Search

First Name	
Last Name	
Social Security Number	
Medicaid ID	
Date of Birth	
* (Required) Admission Status	Active
Admission Date	
Discharge Date	

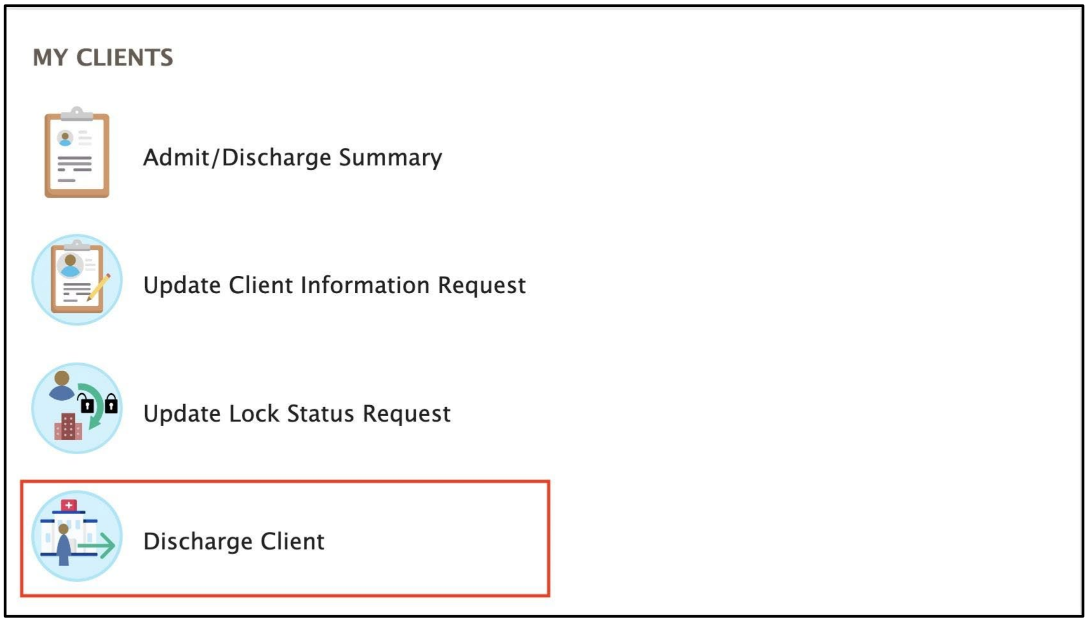
FILTER MY CLIENTS

Search

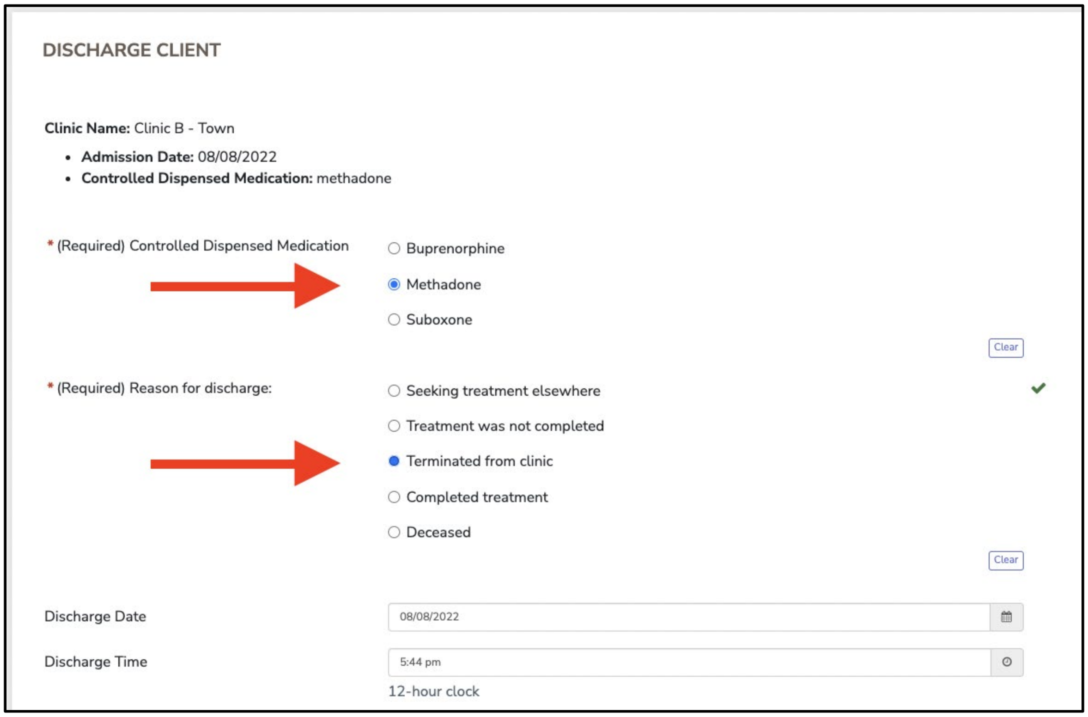
FIRST NAME	LAST NAME	DATE OF BIRTH	SOCIAL SECURITY NUMBER	MEDICAID ID	CURRENTLY ADMITTED
Coco	Johnson	Mar 04, 1978	325-65-9876		No

Filter My Clients

3. Select Discharge Client from the Search My Clients menu.



4. Complete the required fields and submit the form by clicking Submit.



   a. You can access a receipt of the discharge by clicking on the client's name from the Search My Clients module and then clicking on the form labeled, “Admit/Discharge Summary.”

5. The client will appear in the Search My Clients list but the “Currently Admitted” status will be changed to “No”.

FILTER MY CLIENTS

Search

FIRST NAME	LAST NAME	DATE OF BIRTH	SOCIAL SECURITY NUMBER	MEDICAID ID	CURRENTLY ADMITTED
Adam	Smith	Oct 01, 1972	111-22-1111		No
bill	billson	Feb 08, 1990			No

Request a client lock status

1. Navigate to Search My Clients list

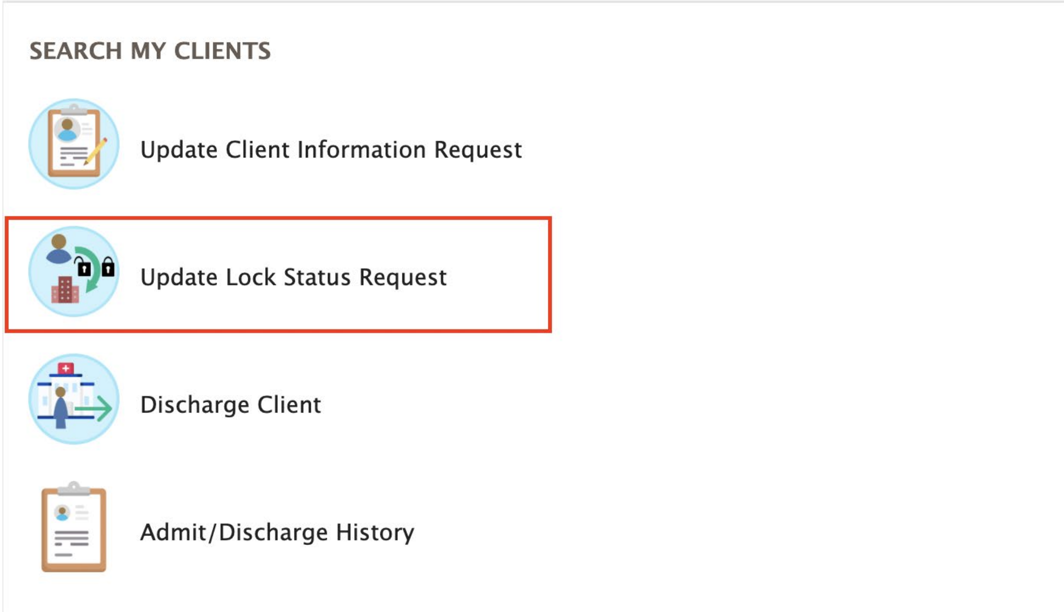
2. Navigate to the desired client record.

SEARCH MY CLIENTS

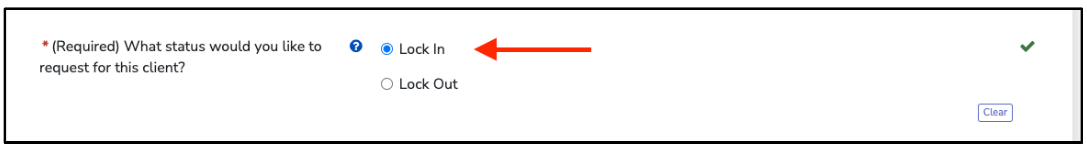
Search

LAST NAME	FIRST NAME	DATE OF BIRTH	SOCIAL SECURITY NUMBER	MEDICAID ID	CURRENTLY ADMITTED
billson	bill	Feb 08, 1990			Admitted

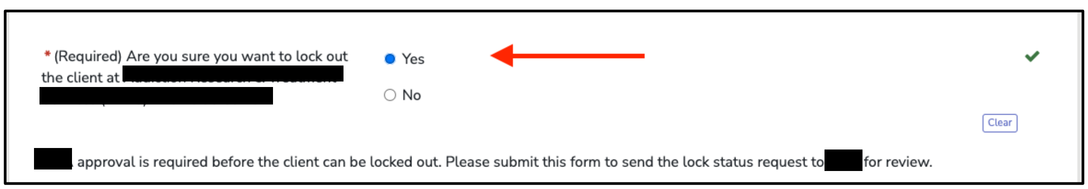
3. From the Search My Client menu select Update Lock Status Request.



4. In the Update Lock Status Request form, select the type of lock you are requesting using the radio buttons next to "What status would you like to request for this client?"
    a. Lock in: The client cannot visit another clinic other than the one indicated.
    b. Lock out: The client cannot visit the clinic that is indicated.



5. Select "Yes" from "Are you sure you want to lock in / lock out the client at [clinic name]"



6. Submit the form by clicking Submit.
7. The pending lock status request will now appear in both the "Clinic" and "State" users' Pending Request case lists, awaiting the "State" user's approval or rejection. The "State" user will also receive an email notification notifying them that a pending request is awaiting review by a [State Behavioral Health Agency] team member.

PENDING REQUESTS

Search

CLIENT ID	NAME	REQUEST TYPE	DAYS OPEN	STATUS
10214e97-40cf-4a7d-ad44-30008425d634	bill billson	Lock Status	0	Pending
[pending]	jazz band	Admission Review	0	Pending

8. Once the lock status is approved or denied, the “Clinic” user will receive another email notification to alert them that a determination has been made by the state.

Request Client Information Update

1. Navigate to Search My Clients list

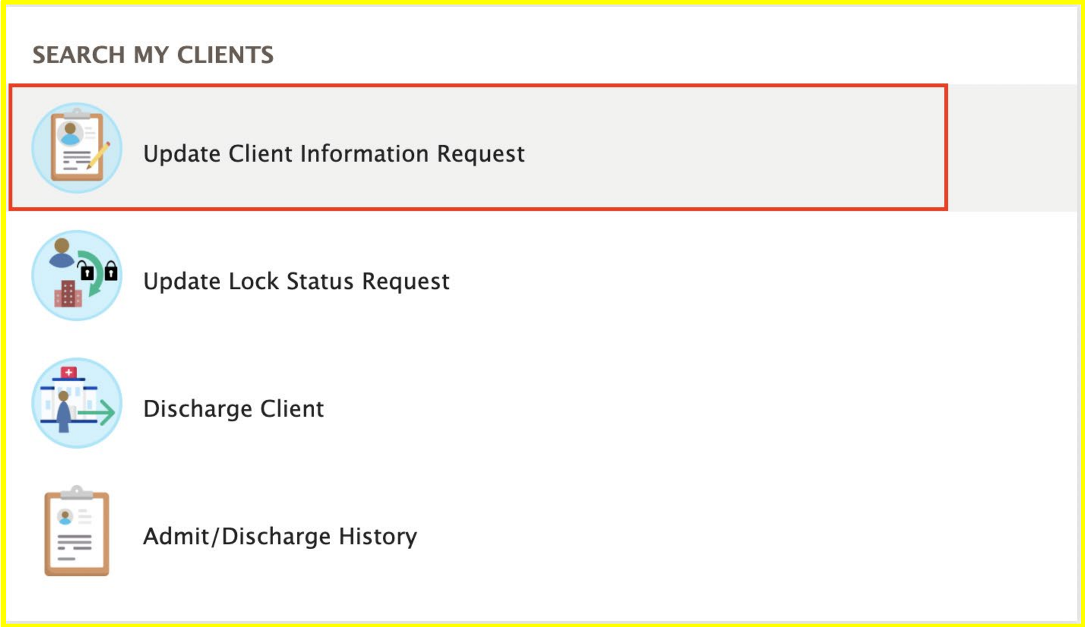
2. Navigate to the desired client record

SEARCH MY CLIENTS

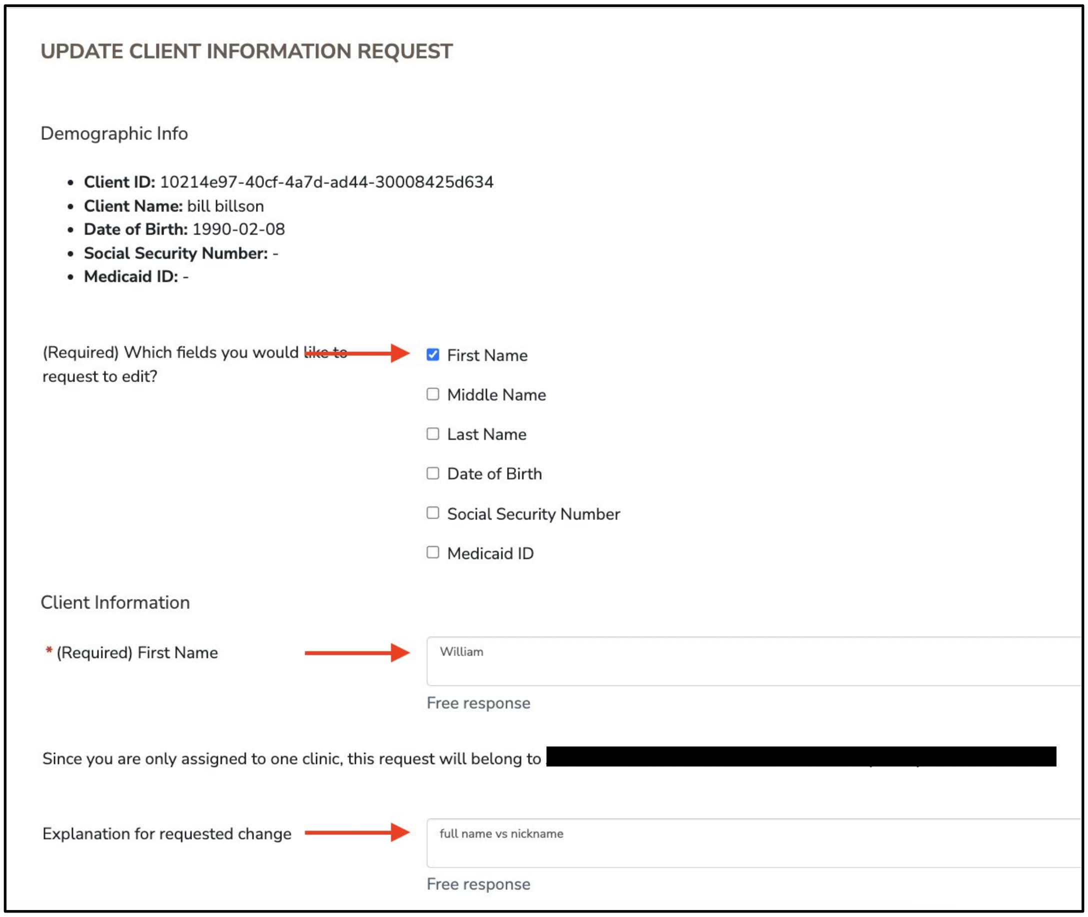
Search

LAST NAME	FIRST NAME	DATE OF BIRTH	SOCIAL SECURITY NUMBER	MEDICAID ID	CURRENTLY ADMITTED
billson	bill	Feb 08, 1990			Admitted

3. From the Search My Client menu select Update Client Information Request



4. Complete the Update Client Information Request form



UPDATE CLIENT INFORMATION REQUEST

Demographic Info

- **Client ID:** 10214e97-40cf-4a7d-ad44-30008425d634
- **Client Name:** bill billson
- **Date of Birth:** 1990-02-08
- **Social Security Number:** -
- **Medicaid ID:** -

(Required) Which fields you would like to request to edit?

- [x] First Name
- [ ] Middle Name
- [ ] Last Name
- [ ] Date of Birth
- [ ] Social Security Number
- [ ] Medicaid ID

Client Information

* (Required) First Name: William

Free response

Since you are only assigned to one clinic, this request will belong to [redacted]

Explanation for requested change: full name vs nickname

Free response

5. Submit the form by clicking Submit.
6. The pending update client information request will now appear in both the “Clinic” and “State” users’ Pending Request case lists, awaiting their approval or rejection. The “State” user will also receive an email notification notifying them that a pending request is awaiting review by a [State Behavioral Health Agency] team member.

PENDING REQUESTS

Search

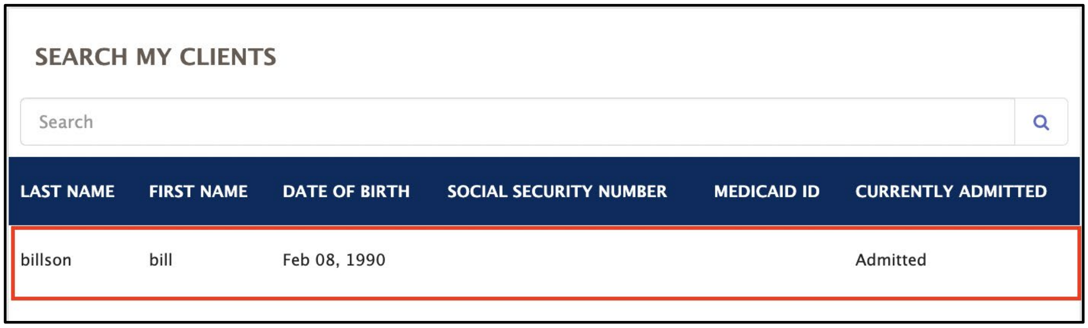
CLIENT ID	NAME	REQUEST TYPE	DAYS OPEN	STATUS
10214e97-40cf-4a7d-ad44-30008425d634	bill billson	Update Client Info	0	Pending

7. Once the pending request is approved or denied, the “Clinic” user will receive another email notification to alert them that a determination has been made by the state.

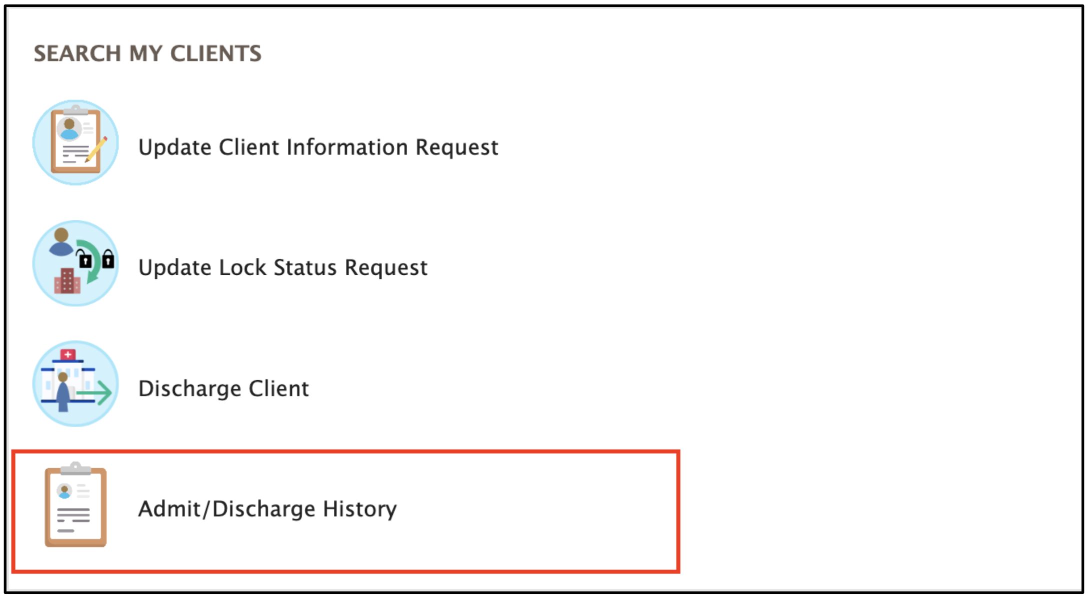
Request Admission Information Update

1. Navigate to Search My Clients list

2. Navigate to the desired client record



3. From the Search My Client menu select Admit/Discharge History



4. In the Search Admission case list, select the desired admission

SEARCH ADMISSIONS

Search

CLIENT ID	CLINIC NAME	ADMISSION DATE	CURRENTLY ADMITTED (YES/NO)	DISCHARGE DATE
10214e97-40cf-4a7d-ad44-30008425d634	[redacted]	Sep 01, 2022	No	Sep 01, 2022
10214e97-40cf-4a7d-ad44-30008425d634	[redacted]	Aug 31, 2022	Yes	

Filter

5. In the Admit/Discharge Summary Form, review the Demographic Information and Admission Summary

Demographic Info

Lock-in: *Lock-in status indicates that the client cannot visit another clinic other than the one indicated. Requests for lock-in status must be approved by* [redacted]

Lock-out: *Lock-out status indicates that the client cannot visit the clinic that is indicated. Requests for lock-out status must be approved by* [redacted]

- **Client ID:** 10214e97-40cf-4a7d-ad44-30008425d634
- **Client Name:** bill billson
- **Date of Birth:** 02/08/1990
- **Social Security Number:** -
- **Medicaid ID:** -
- **Alias(es):** bill billson, new alias
- **Lock Status(es):**

Admission Summary

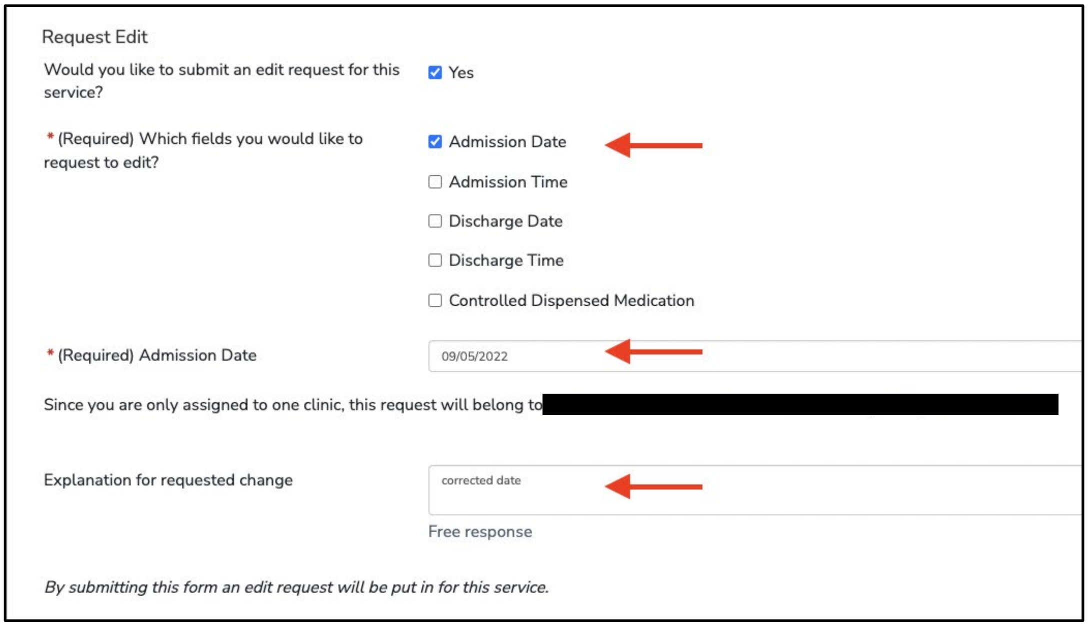
- **Admission Clinic:** [redacted]
- **Admission Date:** 09/01/2022
- **Admission Time:** 2:29 PM
- **Controlled Dispensed Medication:** Methadone
- **Discharge Date:** 09/01/2022
- **Discharge Time:** 2:37 PM

6. Select "Yes" for Request Edit

Request Edit

Would you like to submit an edit request for this service? ☑ Yes

7. New questions will appear in the Request Edit section, select the desired fields to edit and input the updated information.



Request Edit

Would you like to submit an edit request for this service? ☑ Yes

* (Required) Which fields you would like to request to edit?
- ☑ Admission Date
- ☐ Admission Time
- ☐ Discharge Date
- ☐ Discharge Time
- ☐ Controlled Dispensed Medication

* (Required) Admission Date: 09/05/2022

Since you are only assigned to one clinic, this request will belong to [redacted]

Explanation for requested change: corrected date

Free response

By submitting this form an edit request will be put in for this service.

8. Submit the form by clicking Submit.
9. The pending update admission information request will now appear in both the "Clinic" "State" users' Pending Request case lists, awaiting the "State" user's approval or rejection. The "State" user will also receive an email notification notifying them that a pending request is awaiting review by a [State Behavioral Health Agency] team member.

PENDING REQUESTS

Search

CLIENT ID	NAME	REQUEST TYPE	DAYS OPEN	STATUS
10214e97-40cf-4a7d-ad44-30008425d634	bill billson	Update Client Info	0	Pending

10. Once the pending request is approved or denied, the "Clinic" user will receive another email notification to alert them that a determination has been made by the state.

Reports ("Clinic" users)

The Reports section of this User Guide includes information on accessing pre-configured reports in the [State Behavioral Health Agency] Provider Services System. Reports in [State Behavioral Health Agency] Provider Services [System] consist of dashboards generated from Tableau and are embedded within the [State Behavioral Health Agency] Provider Services reporting interface. These reports contain tables and graphs that display data related to client admissions, client discharges, and average lengths of stay on a monthly and annual basis. The types of reports available for each user depend upon their permissions.

Note: All screenshots in this guide use illustrative test data; the guide does not show real patient data.

Permissions

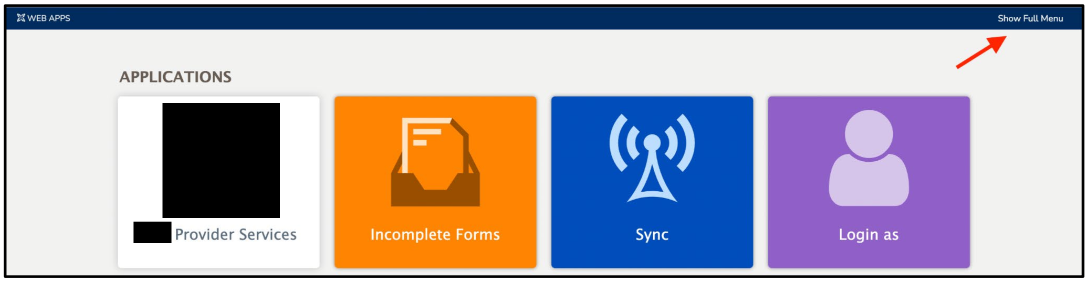
As mentioned above, access to reports and report data are granted based on roles within the [State Behavioral Health Agency] Provider Services [System]. User permissions allow users to access reports and data relating to the clinic(s) they are assigned to.

- **"Clinic"** user permissions allow users to access reports and data relating to their assigned clinics. All reports accessible by "Clinic" users, will be autofiltered to display only information for the users assigned clinics.
- **"Provider"** user permissions allow users to access reports and data for all clinics within a single provider network
- **"State**" admin user permissions allow state administrators to access reports for all data within the [State Behavioral Health Agency] Provider Services [System]. They are the only user able to access deduplication reports (see report #19 below for more information)

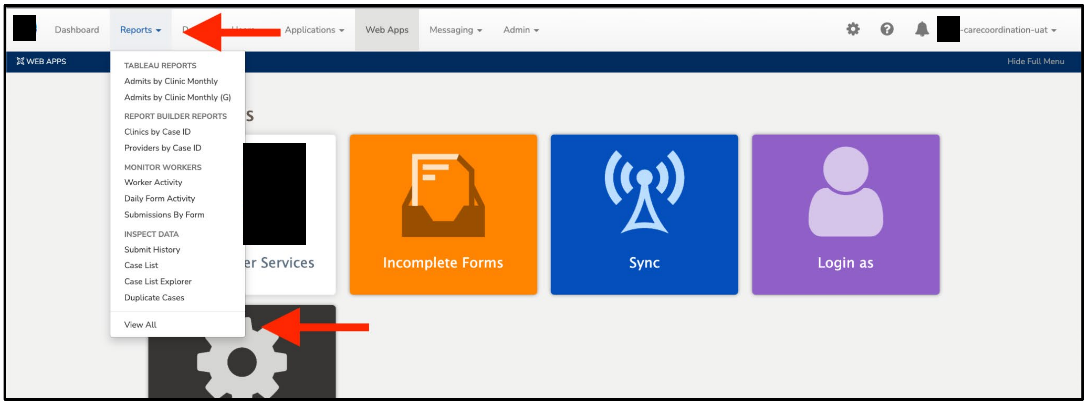
Navigation

Where to find reports

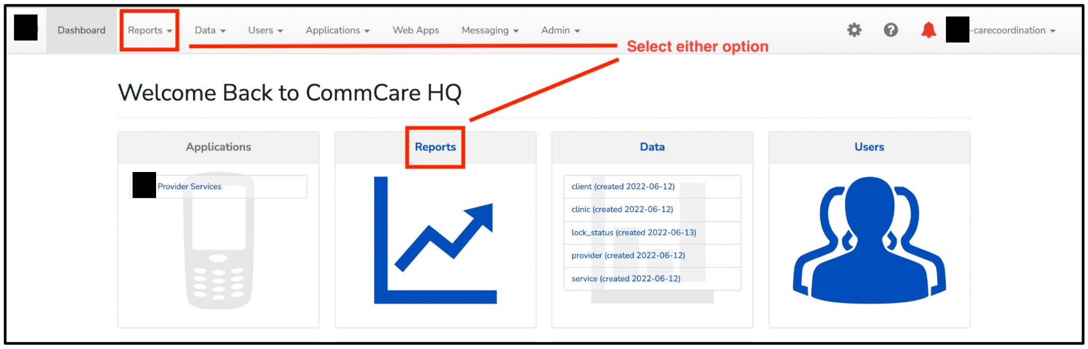
1. Click on Show Full Menu from the home screen of the Web Application. This will reveal a top-level menu at the top of the page.



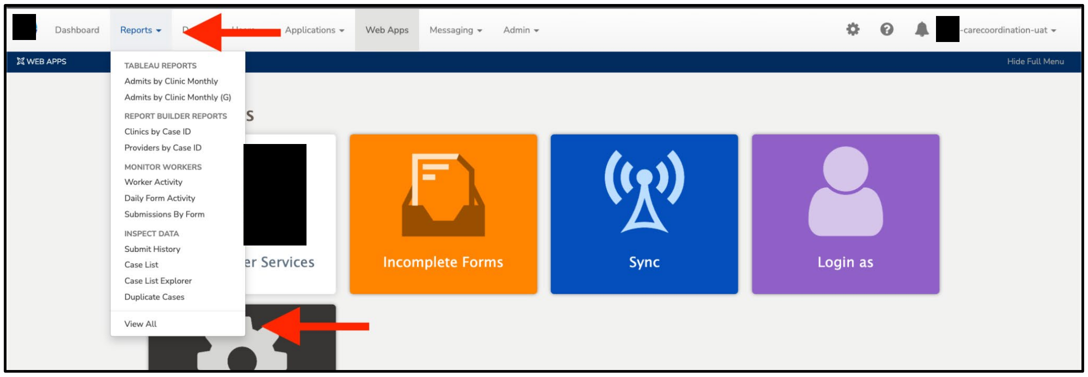
2. Click on "Reports". After selecting the "Reports" tab, a dropdown will appear displaying a list of pre-configured Tableau reports available for your user type.



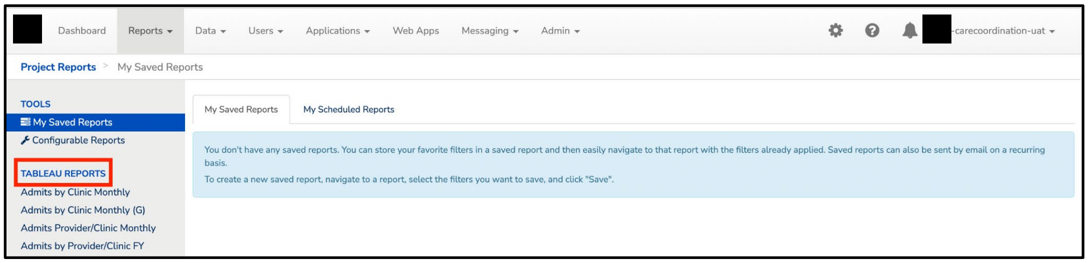
a. **Note:** You can also access reports in the [State Behavioral Health Agency] Provider Services System by selecting “Reports” from the top-level navigation menu or by selecting “Reports” from the CommCare main menu (also known as the “Dashboard”) when you first log in to the system.



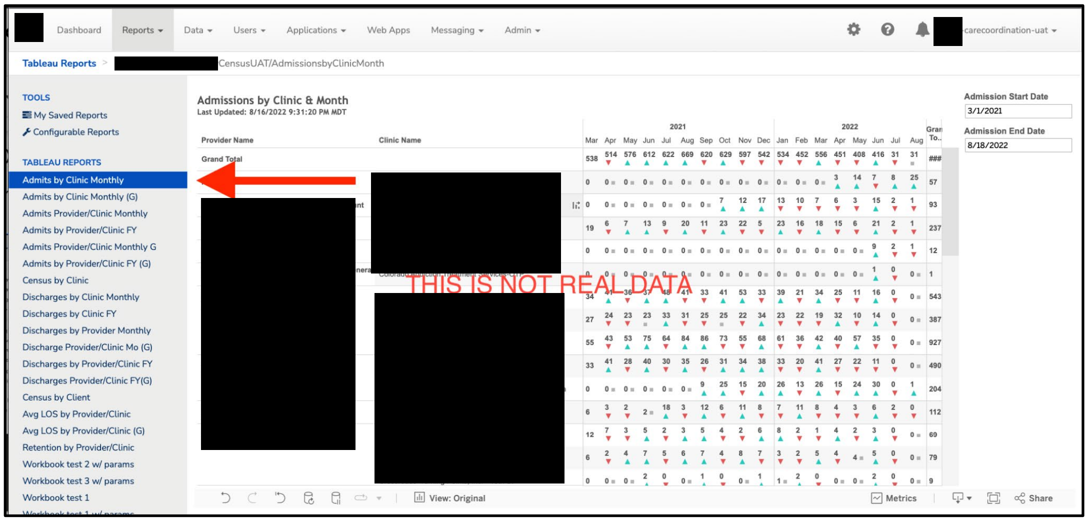
3. Select a specific report or click View All



4. After opening the Reports module by selecting “View All” the top-level navigation menu or “Reports” from the CommCare Dashboard, the pre-configured reports available for your clinic or provider network will be listed under the “Tableau Reports” section on the left panel.

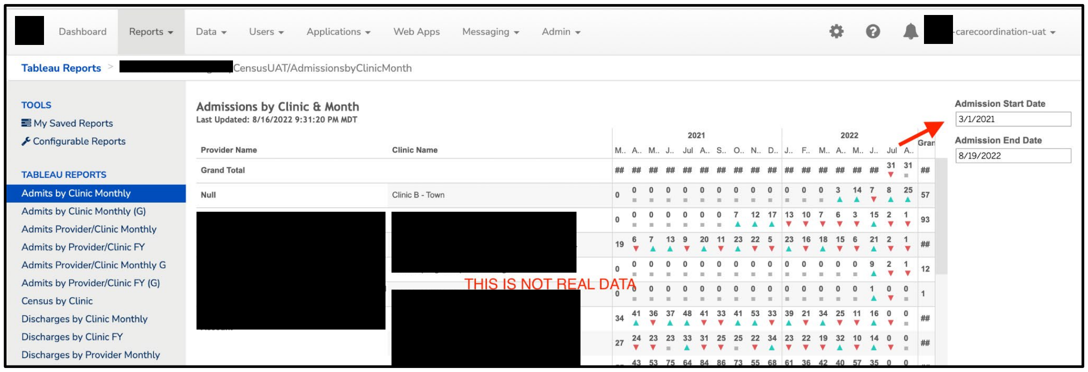


5. Select a report from the list to view data



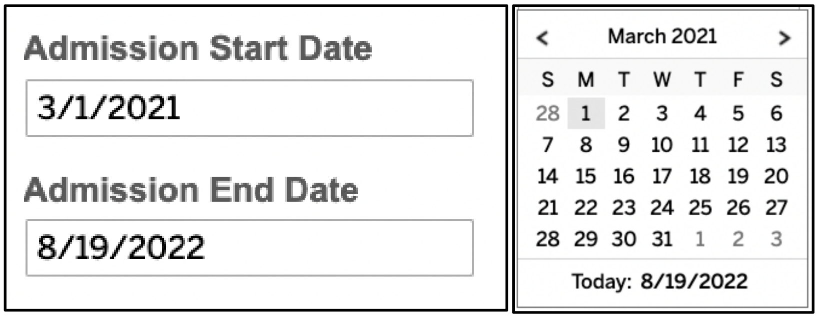
Adjusting report filters

Pre-configured filters are available in the upper right-hand corner of each report. Report filters can be adjusted by users to see various time, date, and clinic configurations of data.

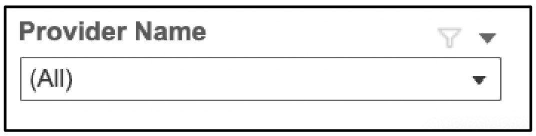


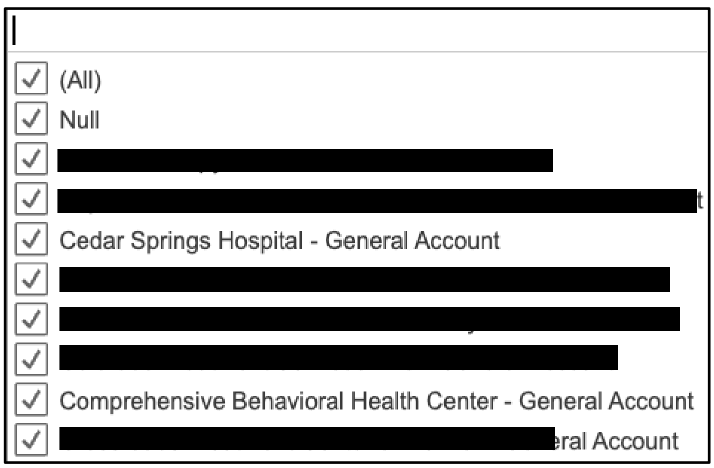
Below is an overview of the available filter types:

- **Date (Type or calendar entry)**



- **Multi-select (dropdown, checkbox)**
    - **Dropdown (include search bar)**

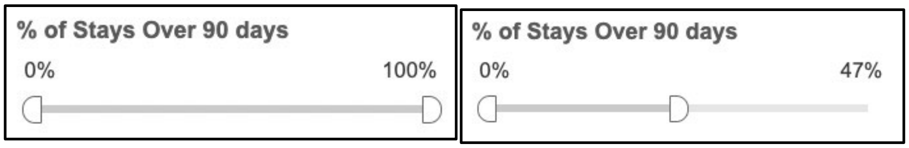




Note: The clinic dropdown field (shown above) is only available to state users as clinic level users have their reports autofiltered to only display data from the appropriate clinic.

    - **Checkbox**

- **Percentage (drag and drop bar)**



Downloading reports

“Clinic” users and “Provider” users can also download the reports and underlying data that is visible to them. To download a report, graph, or dataset, navigate to the bottom right hand side of the screen and select the download icon.

It’s recommended that you download first and then print because printing directly from the application may result in an incomplete display. The download icon reveals a list of format options for download:

- **Image** - selecting this option will download a static image of the table or graph displayed
- **Data** - selecting this option will open a popup window of the table or graph displayed
- **Crosstab** - selecting this option will download a CSV or Excel file with the data underlying for table or graph displayed
- **PDF** - selecting this option will download a PDF document of the table or graph displayed
- **Powerpoint** - selecting this option will download a PowerPoint file of the table or graph displayed with a cover sheet containing the report name.

Note: Follow your clinic's guidelines and policies for handling sensitive health data when exporting reports to avoid exposing PHI/PII.

Miscellaneous

Reports are updated every hour at the top of the hour (i.e. data entered in the application at 11:15AM will be reflected in reports at 12:00PM).

Specific Reports

Note: The tables below use illustrative report names & test data; report names will differ slightly based on clinic or provider network.

Report Key:

- FY = Full Year, This report displays data for the full calendar year
- G = Graph-only, this report contains only a graph

Name	Description	Available filters
1. Admits by Clinic Monthly	Table of monthly admissions by clinic, grouped by calendar year.	• Admission start date • Admission end date

Admissions by Clinic & Month
Last Updated: 8/16/2022 9:31:20 PM MDT

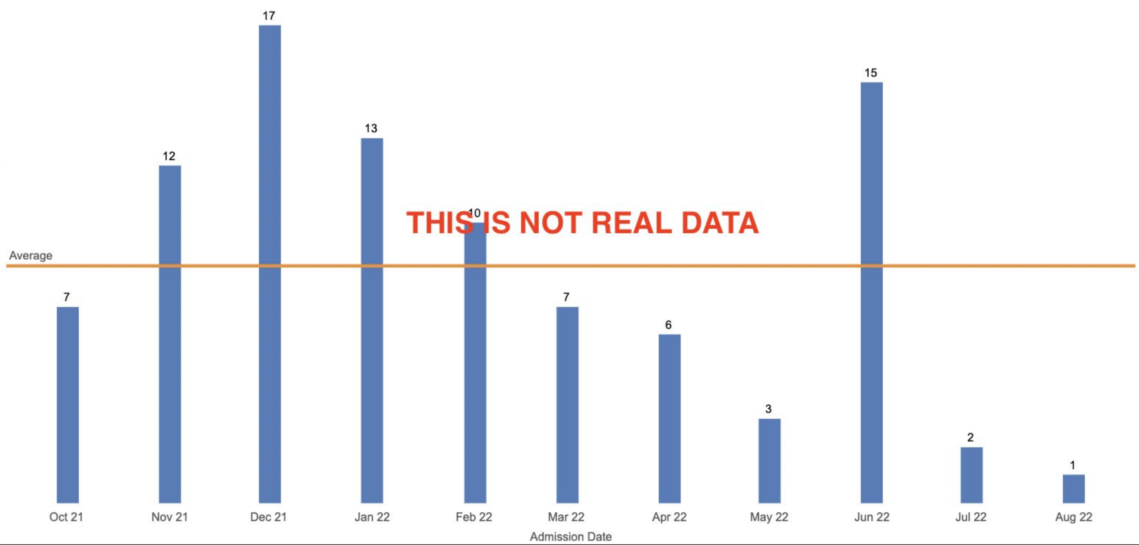
THIS IS NOT REAL DATA

		2021			2022								
Provider Name	Clinic Name	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Grand Total
Grand Total		7	12 ▲	17 ▲	13 ▼	10 ▼	7 ▼	6 ▼	3 ▼	15 ▲	2 ▼	1 ▼	93
[redacted] Therapy Center LLC - General Account	[redacted] Therapy Center LLC - 13th Ave	7	12 ▲	17 ▲	13 ▼	10 ▼	7 ▼	6 ▼	3 ▼	15 ▲	2 ▼	1 ▼	93

Name	Description	Available filters
2. Admits by Clinic Monthly (G)	Graph of monthly admissions by clinic, grouped by calendar year.	• Admission state date • Admission end date

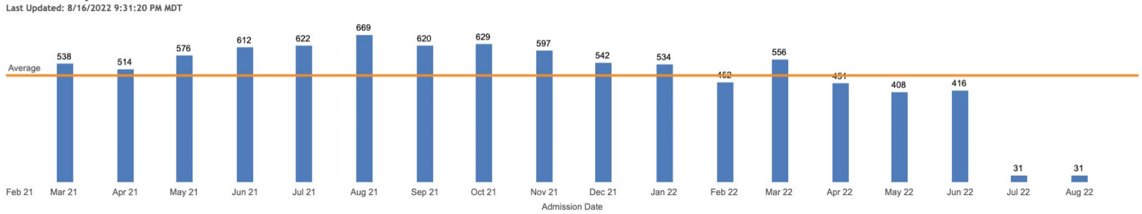
245 Main Street, 2nd Floor
Cambridge, MA 02142, United States

Admissions by Month
Last Updated: 8/16/2022 9:31:20 PM MDT



Name	Description	Available filters
3. Admits Provider/Clinic Monthly	Table and graph of monthly admissions by clinic, grouped by calendar year.	• Clinic name • [System] • Provider name • Service status • Admission start date • Admission end date

Admissions by Month
Last Updated: 8/16/2022 9:31:20 PM MDT



Admission Start Date
3/1/2021

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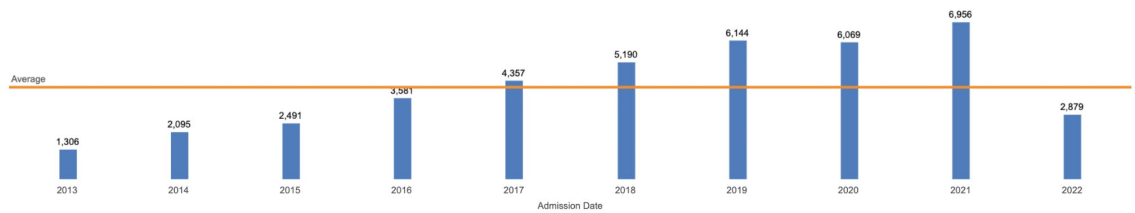
Admission End Date
8/19/2022

Admissions by Clinic & Month
Last Updated: 8/16/2022 9:31:20 PM MDT

		2021										2022								
Provider Name	Clinic Name	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Grand Total
Grand Total		538	514 ▼	576 ▲	612 ▲	622 ▲	669 ▲	620 ▼	629 ▲	597 ▼	542 ▼	534 ▼	452 ▼	556 ▲	451 ▼	408 ▼	416 ▲	31 ▼	31 ■	8,798
Null	Clinic B - Town	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	3 ▲	14 ▲	7 ▼	8 ▲	25 ▲	57
[redacted] Therapy Center LLC - General Account	[redacted] Therapy Center LLC - 13th Ave	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	7 ▲	12 ▲	17 ▲	13 ▼	10 ▼	7 ▼	6 ▼	3 ▼	15 ▲	2 ▼	1 ▼	93
[redacted]	[redacted]	19	6 ▼	7 ▲	13 ▲	9 ▼	20 ▲	11 ▼	23 ▲	22 ▼	5 ▼	23 ▲	16 ▼	18 ▲	15 ▼	6 ▼	21 ▲	2 ▼	1 ▼	237
Cedar Springs Hospital - General Account	Cedar Springs Hospital - [redacted]	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	9 ▲	2 ▼	1 ▼	12
[redacted]	[redacted]	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	1 ▲	0 ▼	0 ■	1

Name	Description	Available filters
4. Admits by Provider/Clinic (FY)	Table and graph of yearly admissions by clinic	• Provider name • Clinic name • Service status • [System] • Admission start date • Admission end date

Admissions by Year
Last Updated: 8/16/2022 9:31:20 PM MDT

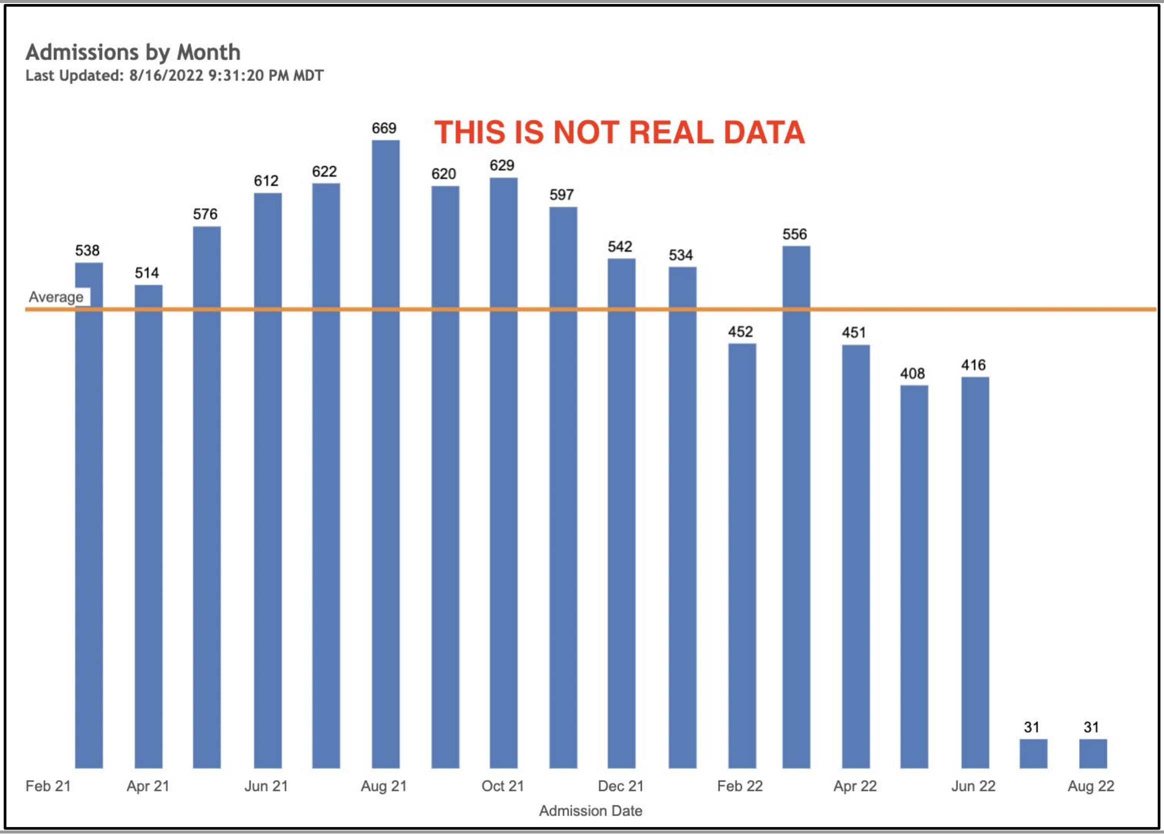


Admission Start Date
1/1/2013
Admission End Date
THIS IS NOT REAL DATA
8/19/2022

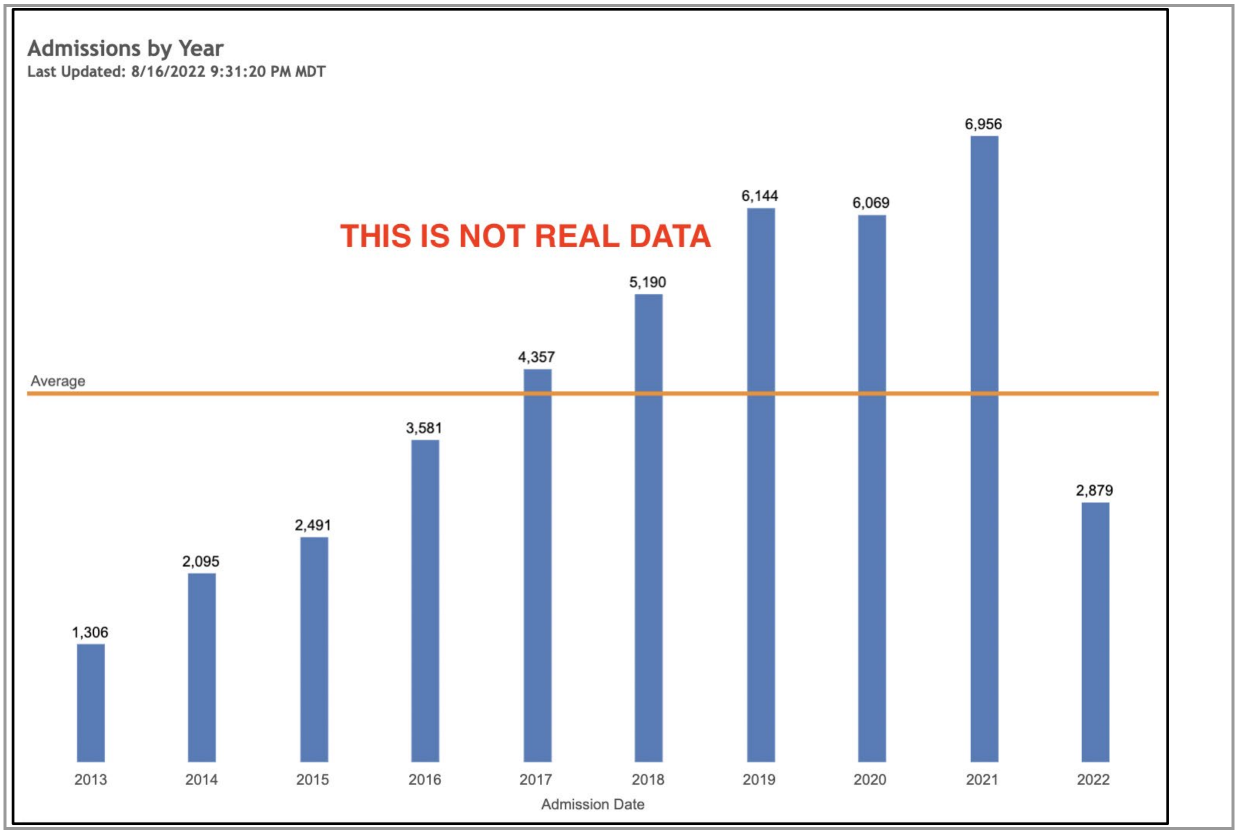
Admissions by Clinic & Year
Last Updated: 8/16/2022 9:31:20 PM MDT

Provider Name	Clinic Name	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Grand T..
Grand Total		1,306	2,095 ▲	2,491 ▲	3,581 ▲	4,357 ▲	5,190 ▲	6,144 ▲	6,069 ▼	6,956 ▲	2,879 ▼	41,068
Null	Clinic B - Town	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	57 ▲	57
[redacted] Therapy Center LLC - General Account	[redacted] Therapy Center LLC - 13th Ave	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	36 ▲	57 ▲	93
[redacted]	[redacted]	74	6 ▼	0 ▼	0 ■	0 ■	1 ▲	184 ▲	164 ▼	168 ▲	102 ▼	699
Cedar Springs Hospital - General Account	Cedar Springs Hospital - [redacted]	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	12 ▲	12
[redacted]	[redacted]	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	1 ▲	1
[redacted]	[redacted]	171	166 ▼	124 ▼	234 ▲	222 ▼	395 ▲	595 ▲	567 ▼	479 ▼	146 ▼	3,099

Name	Description	Available filters
5. Admits Provider/Clinic Monthly (G)	Graph of monthly admissions by clinic	• Admission start date • Admission end date • Provider Name • Clinic name • Service status • [System]



Name	Description	Available filters
6. Admits by Provider/Clinic (FY)(G)	Graph of yearly admissions by clinic	• Admission start date • Admission end date • Provider Name • Clinic name • [System]



Name	Description	Available filters
7. Census by Clinic	Table of open services cases (active admissions), total closed service cases (discharged cases), and distinct clients.	● Provider Name ● Clinic Name ● [System]

dimagi

Current Census
Last Updated: 8/16/2022 9:31:20 PM MDT

THIS IS NOT REAL DATA

Provider Name	Clinic Name	Not Discharged	Total Active Servi..	Total Closed Servi..	Total Null Service ..	Distinct Clients
Null	Null	2	2	0	0	2
	Clinic B - Town	81	51	29	30	96
[redacted] Therapy Center LLC - General Account	[redacted] Therapy Center LLC - [redacted]	71	69	34	0	98
[redacted]	[redacted]	226	225	1,079	0	1,123
Cedar Springs Hospital - General Account	Cedar Springs Hospital - Southgate	15	13	7	0	20
[redacted]	[redacted]	1	1	1	0	2
[redacted]	[redacted]	1	1	0	0	1
[redacted]	[redacted]	554	554	3,486	0	3,237
	Colorado Treatment Services LLC Greeley	266	266	665	0	717
	Colorado Treatment Services LLC Pueblo	735	735	1,924	0	2,017
[redacted] Behavioral Health Center - General Account	[redacted] Behavioral Health Center - [redacted]	387	384	1,795	0	1,566
	[redacted] Behavioral Health Center, Inc. [redacted]	96	96	108	0	169

Name	Description	Available filters
8. Census by Client	Full details of individual client history within the [System] at specified clinic(s).	• Admission Date • Client First Name • Client Last Name • Provider Name • Client [System] Filter • Service Status

Central Registry: Individual Client Census
Last Updated: 8/16/2022 9:31:20 PM MDT

THIS IS NOT REAL DATA

Client Row	Client SSN	Client Full Name	Aliases	Client Date of Birth	Client Lock In Status	Admission Date	Discharge Date	Dispensed Controlled Medication	Provider Name
1	Null	2, fn	fn 2	6/17/2027	Null	5/12/2022	Null	Methadone	[redacted]
2	Null	Acosta, Hamza	Null	7/9/1951	Null	10/21/2013	Null	Buprenorphine	[redacted]
3	Null	Adams, Victor	Null	4/22/1952	Null	9/20/2021	Null	Buprenorphine	Health Solutions - General Account
4	Null	Adams, Vincenzo	Null	1/24/1965	Null	12/5/2019	Null	Buprenorphine	[redacted] Recovery Group - General Account
5	Null	Adkins, Dalton	Null	[illegible]	[illegible]	[illegible]	Null	Buprenorphine	[redacted]
6	Null	Aguilar, Andres	Null	12/31/1966	Null	4/14/2021	Null	Buprenorphine	[redacted], BHG - General Account
7	Null	Ahmed, Davion	Null	7/31/1955	Null	9/19/2017	Null	Buprenorphine	[redacted], BHG - General Account
						7/29/2021	Null	Methadone	[redacted], BHG - General Account
8	Null	Alexander, Langston	Null	2/27/1941	Null	1/24/2020	Null	Methadone	[redacted]
9	Null	Alexander, Scott	Null	7/9/1952	Null	3/22/2016	Null	Buprenorphine	[redacted], BHG - General Account
						3/16/2017	Null	Methadone	[redacted] Recovery Group - General Account

Name	Description	Available filters

9. Discharges by Clinic Monthly	Table of monthly discharges by clinic, grouped by calendar year.	• Discharge start date • Discharge end date

Discharges by Clinic & Month
Last Updated: 8/16/2022 9:31:20 PM MDT

THIS IS NOT REAL DATA

Provider Name	Clinic Name	2021 Oct	2021 Nov	2021 Dec	2022 Jan	2022 Feb	2022 Mar	2022 May	2022 Jun	2022 Jul	Grand Total
Grand Total		1	[illegible]	4 ▲	5 ▲	7 ▲	9 ▲	1 ▼	2 ▲	2 ■	32
[redacted] Therapy Center LLC - General Account	[redacted] Therapy Center LLC - [redacted]	1	1 ■	4 ▲	5 ▲	7 ▲	9 ▲	1 ▼	2 ▲	2 ■	32

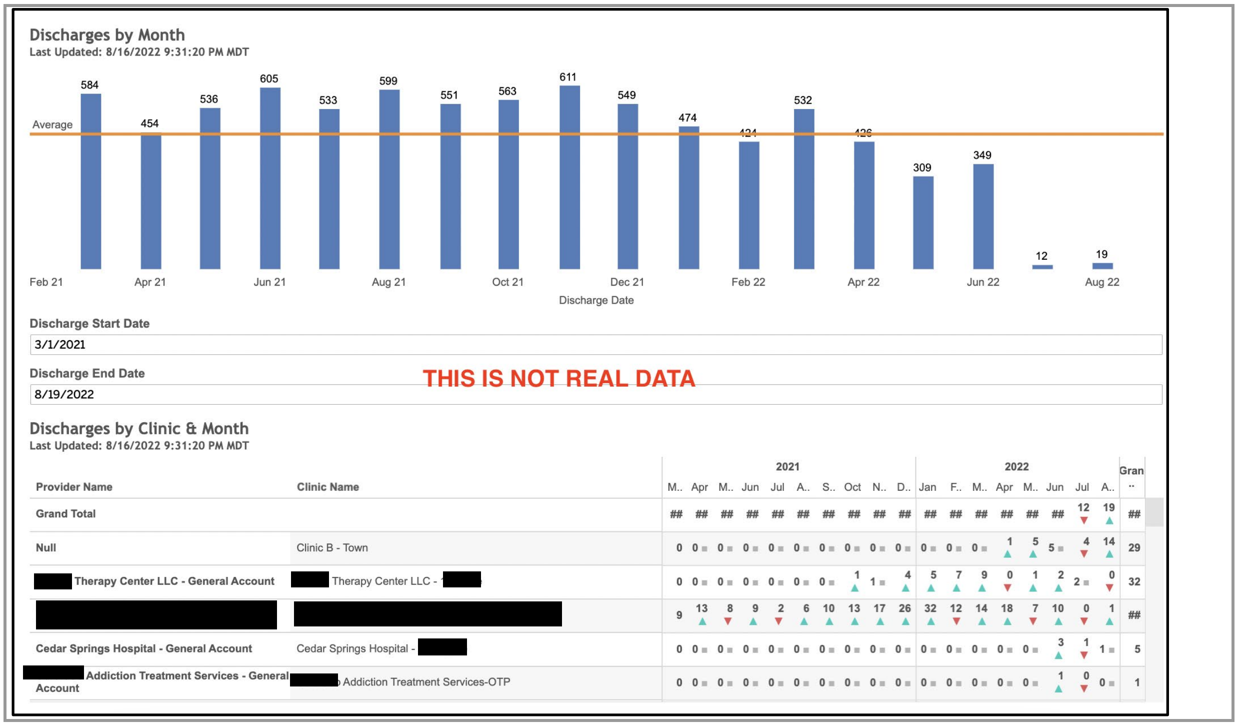
Name	Description	Available filters
10. Discharges by Clinic (FY)	Table of yearly discharges by clinic	• Discharge start date • Discharge end date

Discharges by Clinic & Year
Last Updated: 8/16/2022 9:31:20 PM MDT

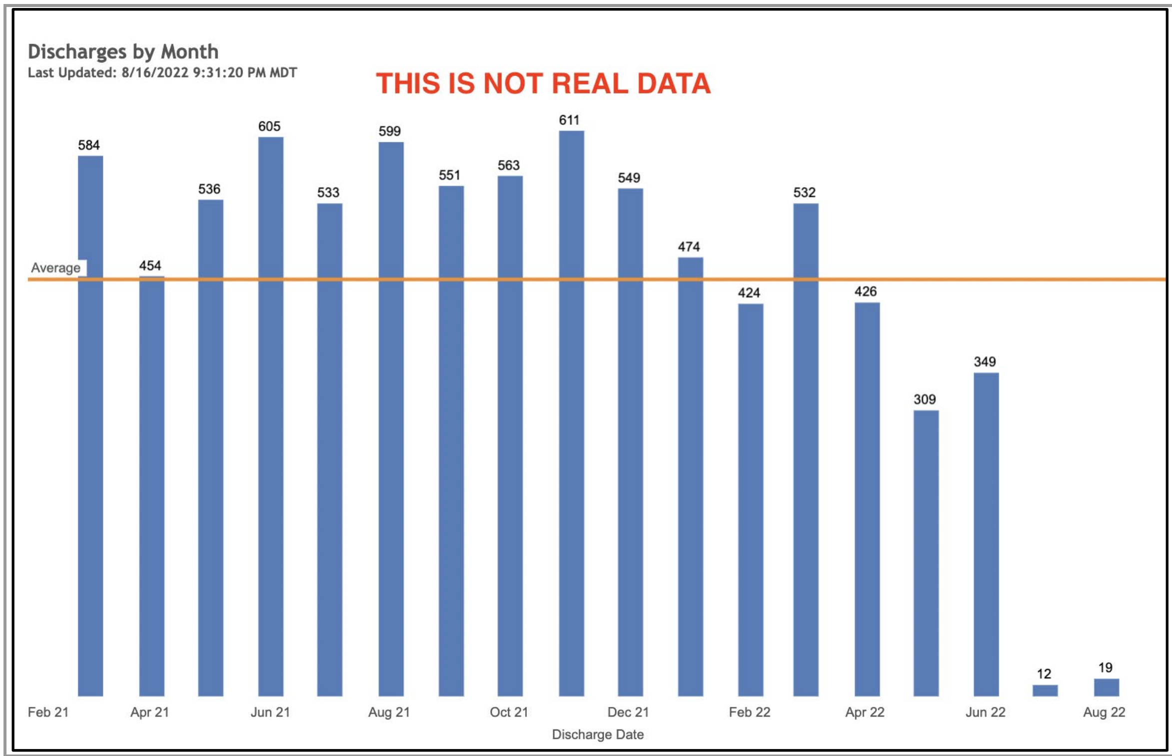
THIS IS NOT REAL DATA

Provider Name	Clinic Name	2021	2022	Grand Total
Grand Total		6	26 ▲	32
[redacted] Therapy Center LLC - General Account	[redacted] Therapy Center LLC - [redacted]	6	26 ▲	32

Name	Description	Available filters
11. Discharges by Provider, Monthly	Table and graph of monthly discharges by clinic, grouped by calendar year	• Provider name • Clinic name • Service status • [System] (OTP) • Discharge start date • Discharge end date

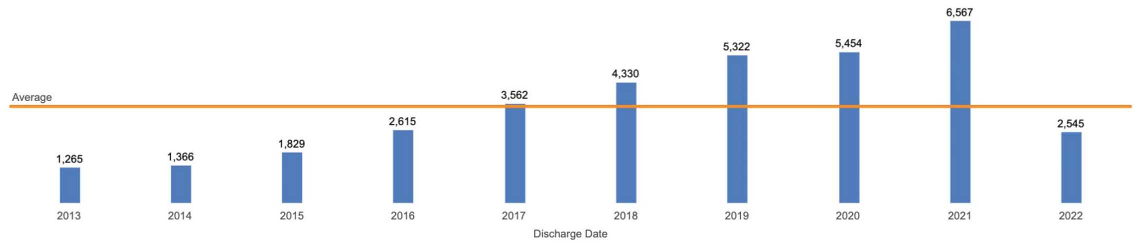


Name	Description	Available filters
12. Discharge Provider/Clinic Monthly (G)	Graph of monthly discharges by clinic, grouped by calendar year.	● Discharge start date ● Discharge end date ● Provider name ● Clinic name ● [System]



Name	Description	Available filters
13. Discharges by Provider/Clinic (FY)	Table and graph of yearly discharges by clinic	• Provider name • Clinic name • Service status • [System] • Discharge start date • Discharge end date

Discharges by Year
Last Updated: 8/16/2022 9:31:20 PM MDT



Discharge Start Date
1/1/2013

Discharge End Date
8/19/2022

THIS IS NOT REAL DATA

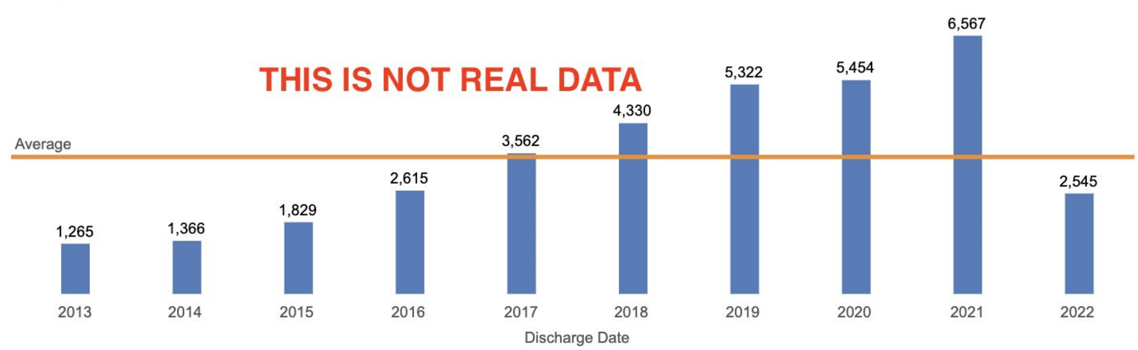
Discharges by Clinic & Year
Last Updated: 8/16/2022 9:31:20 PM MDT

Provider Name	Clinic Name	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Gran..
Grand Total		1,265	1,366 ▲	1,829 ▲	2,615 ▲	3,562 ▲	4,330 ▲	5,322 ▲	5,454 ▲	6,567 ▲	2,545 ▼	34,855
Null	Clinic B - Town	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	29 ▲	29
[redacted] Therapy Center LLC - General Account	[redacted] Therapy Center LLC - [redacted]	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	6 ▲	26 ▲	32
[redacted]	[redacted]	46	42 ▼	9 ▼	7 ▼	3 ▼	85 ▲	83 ▼	75 ▼	142 ▲	94 ▼	586
Cedar Springs Hospital - General Account	Cedar Springs Hospital - [redacted]	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	5 ▲	5
[redacted] Addiction Treatment Services - General Account	[redacted] Addiction Treatment Services-OTP	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	1 ▲	1
[redacted] Treatment Services LLC - General	[redacted] Treatment Services LLC - [redacted]	160	155 ▼	137 ▼	185 ▲	169 ▼	230 ▲	507 ▲	531 ▲	555 ▲	204 ▼	2,833

Name	Description	Available filters
14. Discharges Provider/Clinic (FY)(G)	Graph of yearly discharges by clinic	• Discharge state date • Discharge end date

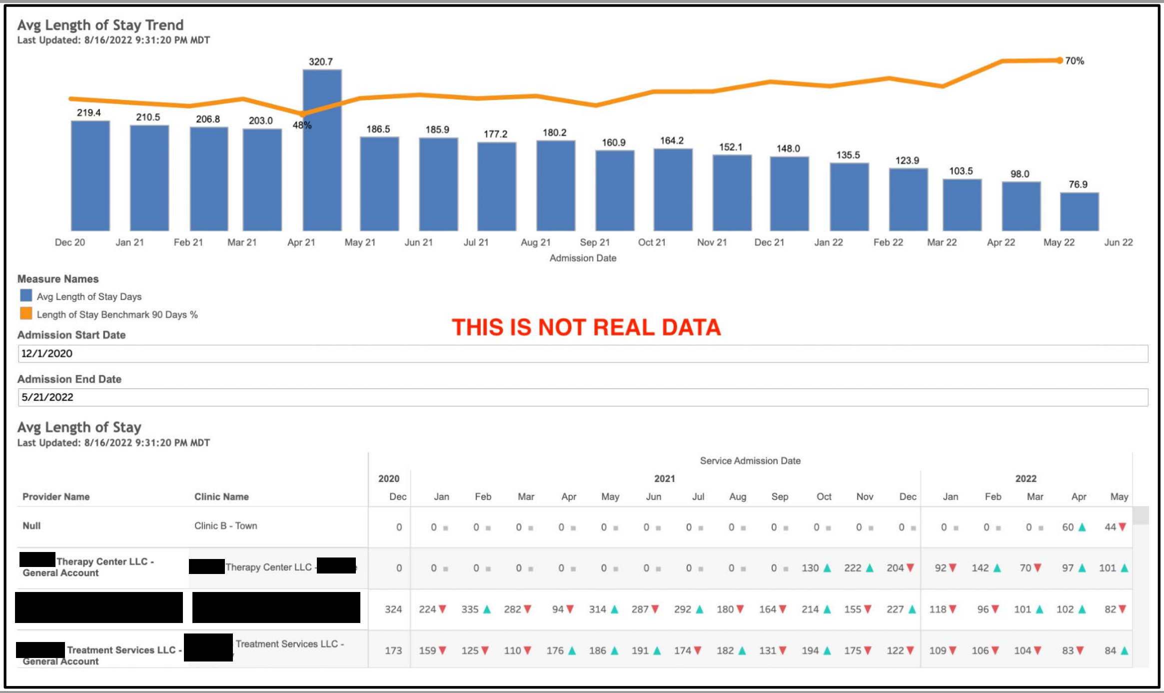
Discharges by Year
Last Updated: 8/16/2022 9:31:20 PM MDT

THIS IS NOT REAL DATA



Name	Description	Available filters
15. Retention by Provider/Clinic (G)	Table and graph of average length of stay per clinic, sorted by month. Only for clients registered in the [System].	• Provider Name • Clinic Name • % of Stays over 90 days • Client [System]

		• Admission start date • Admission end date



Name	Description	Available filters
16. Avg LOS) by Provider/Clinic	Table of average length of stay for clients per clinic, grouped by month.	• Admission start date • Admission end date • Provider Name • Case Name • Service Length of Stay Days Grouped • Client [System]

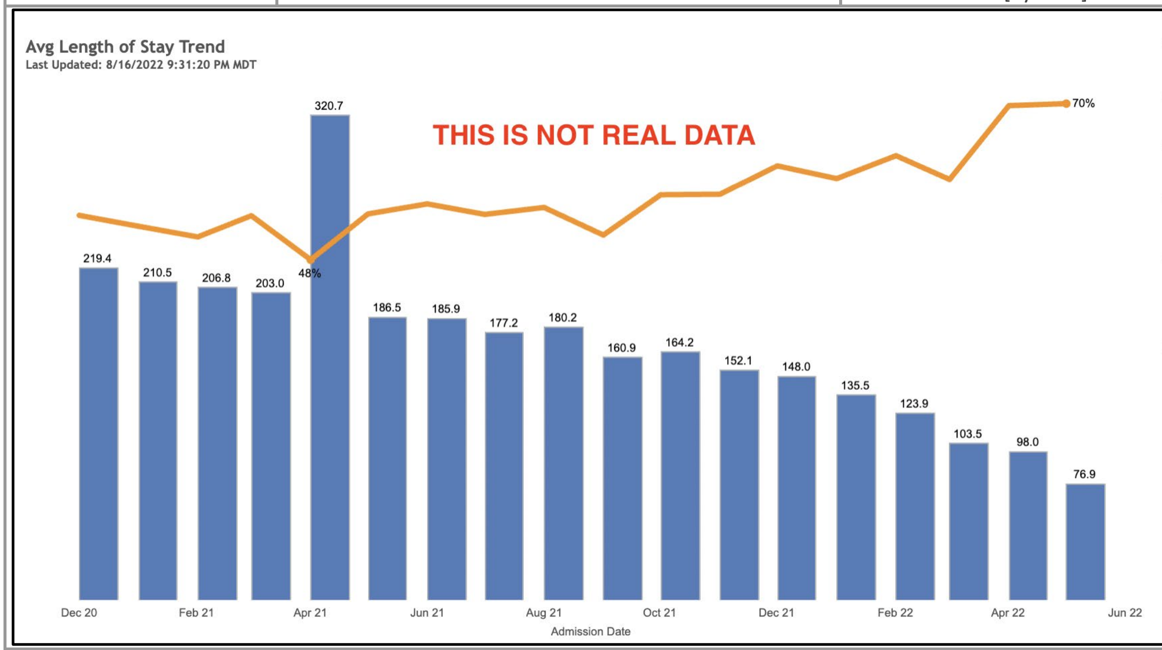
Avg Length of Stay
Last Updated: 8/16/2022 9:31:20 PM MDT

		Service Admission Date																
		2020	2021												2022				
Provider Name	Clinic Name	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Null	Clinic B - Town	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	60 ▲	44 ▼
[redacted] Therapy Center LLC - General Account	[redacted] Therapy Center LLC - [redacted]	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	130 ▲	222 ▲	204 ▼	92 ▼	142 ▲	70 ▼	97 ▲	101 ▲
[redacted]	[redacted]	324	224 ▼	335 ▲	282 ▼	94 ▼	314 ▲	287 ▼	292 ▲	180 ▼	164 ▼	214 ▲	155 ▼	227 ▲	118 ▼	96 ▼	101 ▲	102 ▲	82 ▼
[redacted] Treatment Services LLC - General Account	[redacted] Treatment Services LLC -	173	159 ▼	125	110	176	186	191	174	182	131	194	175 ▼	122 ▼	109 ▼	106 ▼	104 ▼	83 ▼	84 ▲
	[redacted] Treatment Services LLC	225	206 ▼	[illegible]	[illegible]	[illegible]	[illegible]	212 ▲	164 ▼	170 ▲	182 ▲	181 ▼	167 ▼	103 ▼	121 ▲	132 ▲	68 ▼	88 ▲	41 ▼
	Colorado Treatment Services LLC Pueblo	249	205 ▼	209 ▲	165 ▼	176 ▲	194 ▲	182 ▼	152 ▼	175 ▲	160 ▼	147 ▼	118 ▼	128 ▲	101 ▼	129 ▲	86 ▼	88 ▲	84 ▼
Comprehensive Behavioral Health Center - General Account	Comprehensive Behavioral Health Center - [redacted]	149	189 ▲	163 ▼	144 ▼	218 ▲	97 ▼	145 ▲	130 ▼	121 ▼	160 ▲	84 ▼	73 ▼	141 ▲	139 ▼	107 ▼	82 ▼	90 ▲	44 ▼
	Comprehensive Behavioral Health Center, Inc. [redacted]	0	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	0 ■	161 ▲	160 ▼	140 ▼	55 ▼	147 ▲	76 ▼	70 ▼	63 ▼	66 ▲
Crossroads Treatment Center of [redacted] - General Account	Crossroads Treatment Center of Denver [redacted]	328	332 ▲	218 ▼	339 ▲	63 ▼	459 ▲	424 ▼	191 ▼	88 ▼	226 ▲	246 ▲	160 ▼	120 ▼	212 ▲	94 ▼	129 ▲	40 ▼	0 ▼
[redacted]	[redacted]	341	223 ▼	0 ▼	280 ▲	249 ▼	306 ▲	157 ▼	263 ▲	289 ▲	222 ▼	307 ▲	0 ▼	140 ▲	140 ▲	114 ▼	157 ▲	110 ▼	75 ▼

THIS IS NOT REAL DATA

Data Visualization

Name	Description	Available filters
17. Avg LOS by Provider/Clinic (G)	Graphs of 1) average length of stay for clients per clinic, grouped by month (bar graph) and 2) percentage of clients that stayed more than 90 days (line graph).	• Admission start date • Admission end date • Provider Name • Client [System]



Name	Description	Available filters
18. Percentage LOS > 90 days	Table view of percentages where length of stays exceed 90 days of service.	● Admission start date ● Admission end date ● Provider Name ● Service Length of Stay Days Grouped ● Client [System]

	Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130	**State of West Virginia** **Centralized Request for Information** **Info Technology**

Proc Folder: 1985877

Doc Description: RFI-TRACKING SYSTEM FOR SUBSTANCE USE DISORDER PROVIDERS

Proc Type: Request for Information

Reason for Modification:
ADDENDUM 1
TO PROVIDE ANSWERS TO VENDOR QUESTIONS

Date Issued	Solicitation Closes	Solicitation No	Version
2026-07-09	2026-07-14 13:30	CRFI 0511 BMS2600000001	2

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON WV 25305
US

VENDOR

Vendor Customer Code: VS0000039144

Vendor Name : Dimagi, Inc.

Address : 245 Main Street, 2nd Floor

Street :

City : Cambridge

State : Massachusetts **Country :** United States **Zip :** 02142

Principal Contact : Lilian Olson, Managing Director - US Solutions

Vendor Contact Phone: 617-852-3867 **Extension:**

FOR INFORMATION CONTACT THE BUYER
Crystal G Hustead
(304) 558-2402
crystal.g.hustead@wv.gov

Vendor Signature X Lilian Olson (Jul 13, 2026 10:30:00 EDT) **FEIN#** 83-0343298 **DATE** July 13, 2026

All offers subject to all terms and conditions contained in this solicitation

SOLICITATION NUMBER: CRFI BMS2600000001
Addendum Number: 1

The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

Applicable Addendum Category:

[ ] Modify bid opening date and time

[ ] Modify specifications of product or service being sought

[✓] Attachment of vendor questions and responses

[ ] Attachment of pre-bid sign-in sheet

[ ] Correction of error

[ ] Other

Description of Modification to Solicitation:

1. To provide answers to vendor questions

No other changes

Additional Documentation: Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

Terms and Conditions:

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.

2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Question 1: **How many providers fall under the scope of the solution being requested? Can an approximate patient panel size associated with that provider network be provided?**

Answer 1: All current BMS certified residential treatment providers.

Question 2: **Does the Agency currently utilize a solution that tracks some or all of the performance outcome measures identified in Section 3.2.2 of the RFI? If so, are there known gaps or limitations with the existing solution that this procurement is intended to address?**

Answer 2: No solution currently provides these services.

Question 3: **What is the anticipated contract value for this service?**

Answer 3: The State of WV does not provide budget information.

Question 4: **Is there a timeline in pursuing the project?**

Answer 4: There is no current timeline for this project, responses to the RFI may assist in developing any timeline and future steps.

Question 5: **Is there a current vendor providing this service or is it a new requirement? If there is a current vendor, could you please provide the current contract documents/information?**

Answer 5: There is no current vendor providing this service.

Addendum 1_Dimagisigned

Final Audit Report 2026-07-13

Created:	2026-07-10
By:	Melissa Clements (ush-partnerships-news@dimagi.com)
Status:	Signed
Transaction ID:	CBJCHBCAABAAM8QB_idUzWue_bXr8VvjGeFCXej8g156

"Addendum 1_Dimagisigned" History

Document created by Melissa Clements (ush-partnerships-news@dimagi.com)
2026-07-10 - 7:30:52 PM GMT

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2026-07-10 - 7:30:59 PM GMT

Email viewed by Lilian Olson (lolson@dimagi.com)
2026-07-13 - 2:29:18 PM GMT

Document e-signed by Lilian Olson (lolson@dimagi.com)
Signature Date: 2026-07-13 - 2:30:00 PM GMT - Time Source: server - Signature Appearance Selected: DRAW

Agreement completed.
2026-07-13 - 2:30:00 PM GMT

West Virginia

Rural Health Transformation Program

Dimagi, Inc. response to RFI #CRFI 0511 BMS2600000001: Tracking System for Substance Use Disorder Providers

Vendor information:
Dimagi, Inc.
245 Main Street, 2nd Floor, Cambridge, MA 02142
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Point of Contact:
Lilian Olson
Managing Director of Strategy, US Solutions
lolson@dimagi.com

July 13, 2026

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Cover Letter

Dear West Virginia Department of Human Services (DoHS), Bureau for Medical Services (BMS),

Dimagi appreciates the opportunity to respond to the Request for Information and help inform future planning and procurement activities related to statewide substance use disorder provider tracking and outcome reporting. This response is intended to share practical examples from Dimagi's experience designing and implementing statewide behavioral health technology systems that support data collection, reporting, and care coordination.

Our response highlights our ongoing partnership with the Colorado Behavioral Health Administration (BHA). Since 2022, Dimagi's CommCare platform has served as the technical infrastructure behind the BHA's care coordination and statewide reporting system. We also describe how CommCare supports behavioral health initiatives currently underway in Philadelphia and planned for the Commonwealth of Pennsylvania.

Dimagi works as a long-term partner to state and local government agencies, configuring solutions around each program's existing data infrastructure and evolving needs. CommCare does more than track outcome measures. The same platform can run central registries, referral coordination, and other behavioral health operations, so a state can build on one platform rather than adding new systems as needs grow. Providers can report data through manual entry, file upload, or API integration, matched to their existing technical capacity. We design every provider-facing workflow directly with the staff who use it daily, so the system fits how providers already work rather than adding a separate reporting burden.

Separately, Dimagi also responded to the Connected Care Grid Request for Information, highlighting complementary capabilities through our SureAdhere platform for virtual care and patient engagement. Together, these responses reflect our interest in supporting West Virginia's broader behavioral health infrastructure and long-term planning efforts.

Thank you for your consideration. We appreciate the opportunity to contribute to this planning effort and welcome continued discussion as the State's approach and future procurement strategy evolve.

Sincerely,

Lilian Olson
Managing Director of Strategy, US Solutions
lolson@dimagi.com

3.1 General Information:
Dimagi & Tracking System Solutions

Dimagi builds configurable data systems for state behavioral health and substance use disorder programs, including outcome tracking, care coordination, and reporting. Our low-code platform, CommCare, captures agencies' unique outcome measures and workflows without custom development, so the system can change as program requirements evolve. This approach currently supports statewide behavioral health data infrastructure for the Colorado Behavioral Health Administration and an upcoming engagement with Pennsylvania's Department of Drug and Alcohol Programs.

About Dimagi

Dimagi is a mission-driven technology services and SaaS provider specializing in the design, implementation, and ongoing operation of secure, statewide public health and behavioral health data systems. We partner with state and local government agencies to deliver configurable, cloud-based solutions that support a variety of use cases including real-time capacity visibility, care coordination, and program oversight across complex, multi-jurisdictional environments.

Dimagi offers multiple technologies including CommCare, our flagship low-code platform, and SureAdhere, a patient engagement platform for medication adherence monitoring included in Dimagi's response to West Virginia Rural Health Transformation Program RFI# CCG1 Outpatient Remote Monitoring.

Proven Platform for Behavioral Health

Dimagi offers a cloud-hosted, SaaS solution that joins two primary components: CommCare, Dimagi's open-source low-code application platform, which serves as a provider- and administrator-facing web application, and the Dimagi Data Platform, a suite of industry-leading tools for data exchange, transformation, storage, and reporting.

CommCare: CommCare is a proven platform for deploying statewide solutions. Its flexibility enables solutions that feel tailored to local requirements, while relying on the stability and scalability of an established platform. CommCare offers critical reporting capabilities, while retaining the ability to adapt as West Virginia expands to new care settings or functionality.

Data and Analytics: The Dimagi Data Platform is a comprehensive suite of tools designed to streamline data integration, support reporting, and enable advanced analysis with user-friendly, configurable capabilities. Hosted on AWS, the solution ensures leading security, scalability, and reliability. Key components of the solution include:

- **Snowflake:** A state-of-the-art data warehousing platform that aggregates data seamlessly from diverse sources, including EHRs, CommCare, and other external systems. Snowflake supports unlimited data storage and transformation.

- **Tableau:** A robust data visualization and reporting tool that empowers users to create custom reports and dashboards tailored to reporting requirements. Reports can be accessed directly within CommCare for a unified user experience or through Tableau's interface by authorized users, ensuring flexibility and accessibility.

Together, these tools already enable care coordination, data collection, and reporting in behavioral health and human services, including a multi-year engagement with the State of Colorado Behavioral Health Administration and an upcoming project with the Commonwealth of Pennsylvania Department of Drug and Alcohol Programs, both described below. Dimagi's solutions support both nearterm outcome tracking and other potential needs in behavioral health care coordination, reporting, and program oversight.

Our Experience

For more than 20 years, Dimagi has partnered with more than 25 U.S. states, over 100 countries, and multiple federal agencies. We serve as a technology partner on complex, multi-year engagements, working closely with state agencies and their provider stakeholders to support care coordination, data collection, and reporting. Our team provides end-to-end technology services and configurable digital solutions that respond to program goals, existing workflows, and long-term operational needs.

Our behavioral health experience includes a multi-year engagement with the Colorado Behavioral Health Administration (BHA), recently started work with the City of Philadelphia Department of Behavioral Health and Intellectual disAbility Services, and upcoming work with the Commonwealth of Pennsylvania's Department of Drug and Alcohol Programs. We have also delivered statewide and regional data systems for the Indiana Department of Health, the Vermont Agency of Human Services, and the City of Somerville. Each is described below.

Colorado Behavioral Health Administration - 2022 to present

Since February 2022, Dimagi has served as the technical services provider to the Colorado Behavioral Health Administration (BHA), designing, implementing, and supporting a statewide behavioral health data ecosystem. The implementation includes the Medication-Assisted Treatment (MAT) Central Registry, Provider Directory, Capacity Tracker, referral workflows, and a statewide reporting and analytics platform.

MAT Central Registry: The registry enables providers to verify enrollment status and complete intake within a single digital workflow. Since launch, it has supported more than 32,000 MAT admissions, including more than 10,000 active admissions for the first time in the state's history. Average intake time has been reduced to approximately 2.25 minutes, 97% of admissions no longer require direct state intervention, and automated deduplication workflows have resolved more than 6,600 duplicate enrollment instances. Providers complete intake independently through the registry rather than contacting state staff for verification, reducing a step that previously applied to every admission.

Provider Directory and Capacity Tracker: Building on the Central Registry, Dimagi developed real-time capacity tracking and referral workflows that connect clients with appropriate behavioral health services based on need and provider availability, supporting statewide coordination across Colorado's behavioral health provider network.

Statewide Data Platform. The Dimagi Data Platform manages an integration pipeline from CommCare to Snowflake, with embedded Tableau dashboards feeding the Colorado Performance Hub, a public-facing tool that also supports state and federal reporting, including SAMHSA block grant reporting. The platform provides secure, role-based access for more than 650 users across 233 facilities, with data sharing governed by 42 CFR Part 2 confidentiality requirements for substance use treatment records.

Expanding Behavioral Health Portfolio

Philadelphia Department of Behavioral Health and Intellectual disAbility Services - May 2026 - Present: Dimagi is implementing a Centralized Bed Registry giving participating providers visibility into behavioral health bed availability, referrals across levels of care, and divert status, with Tableau-based reporting integrated into the City's data warehouse.

Pennsylvania Department of Drug and Alcohol Programs - Kicking off in 2026: Dimagi is preparing to implement a statewide Data Reporting System replacing three legacy systems with a modular CommCare solution covering substance use disorder treatment, prevention, gambling prevention, fiscal reporting, and problem gambling treatment, paired with a Snowflake-based data platform for state operations and federal reporting.

Additional Statewide and Regional Implementations

Vermont Agency of Human Services - October 2022 to March 2024: Dimagi partnered with four distinct state departments to deploy a case management and referral platform within three weeks of contract execution, supporting approximately 3,000 households transitioning out of emergency housing amid the expiration of federal motel voucher funding. The platform tracked more than 1,000 referrals across employment, housing, healthcare, and benefits services and was later expanded to support a statewide Social Determinants of Health screening pilot. The platform was built to require minimal training prior to deployment, reducing the upfront training investment needed to bring four agencies onto a shared system within the three-week timeline.

Indiana Department of Health, Maternal and Child Health - May 2026 to present: Dimagi is engaged to support the Indiana Department of Health (IDOH) in developing a new statewide Maternal and Child Health (MCH) Data System. This initiative will replace outdated systems and manual workarounds with an integrated platform built on CommCare and the Dimagi Data Platform, providing actionable data for the State, its partners, and its grantees.

The system will automate the integration of data from seven source systems into a case management and workflow tool, supporting 26,000 users across hospitals, birthing centers, program providers, and outreach agencies. Functionality includes patient-centric profile views, streamlined workflows, and systematic communication with families (e.g., generation of tailored letters for follow-up care needs). By leveraging CommCare, the system will enhance collaboration across the Continuum of Care, providing timely, accurate information to improve pregnancy outcomes and early childhood health in Indiana.

City of Somerville, Massachusetts - January 2025 to present: Dimagi is partnering with the City of Somerville's Department of Health and Human Services to implement a comprehensive data management system for the Public Health Nursing and Community Health Worker divisions serving Somerville, Medford, and Arlington, Massachusetts. Previously reliant on spreadsheets, these teams faced inefficiencies, inaccuracies, and security risks in managing client data.

The new system, built on CommCare, provides secure, centralized tools for case management, document storage, service notes, and longitudinal care tracking. Key capabilities include HIPAA-compliant data protections, support for advanced analytics, and intuitive user interfaces requiring minimal training.

3.1.1. Dimagi Tracking System Solutions

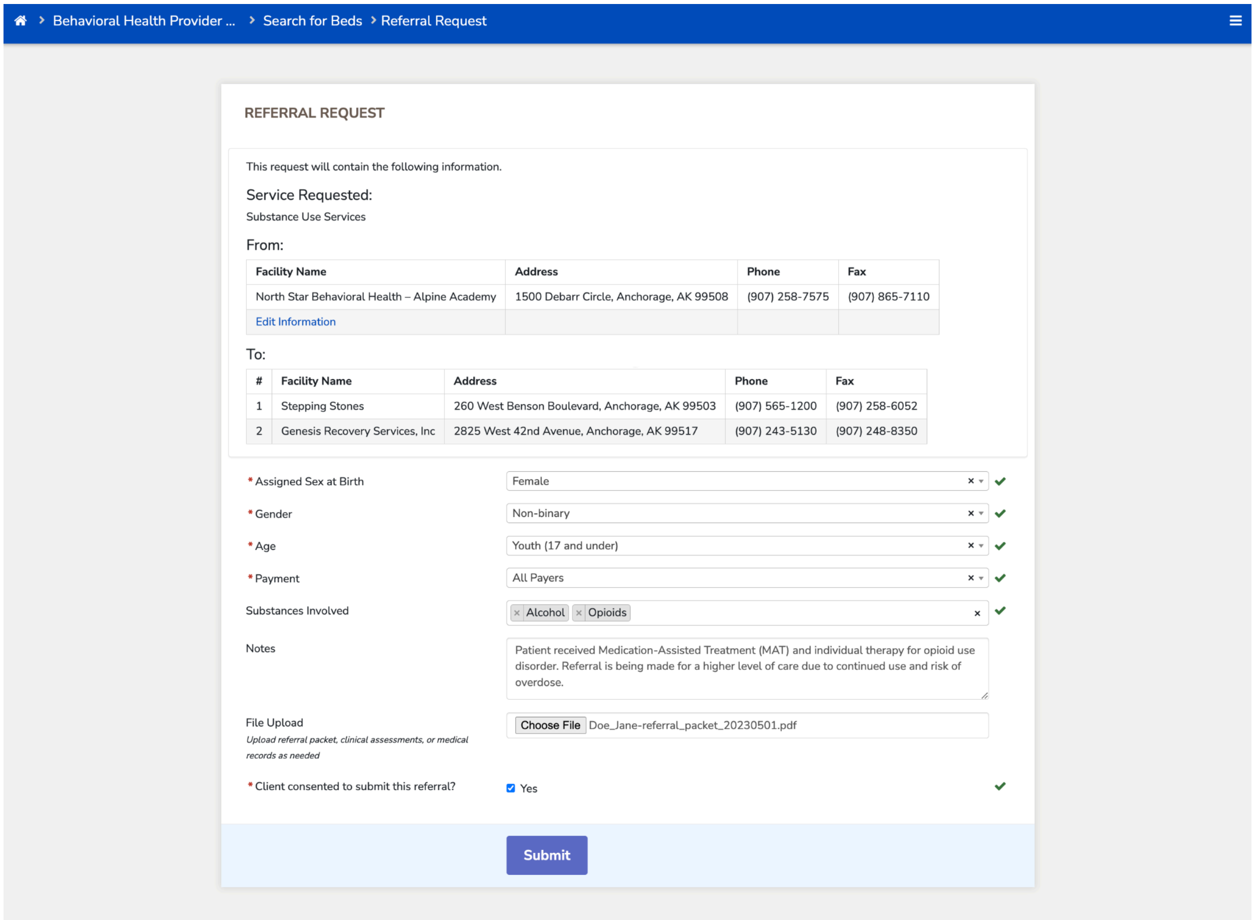
Dimagi designs each tracking system implementation around the specific outcome measures, workflows, and reporting formats a program requires. Using CommCare and our integrated data tools, Dimagi has applied this approach to statewide behavioral health and substance use disorder tracking for Colorado BHA, and is applying it next to an upcoming engagement with Pennsylvania's Department of Drug and Alcohol Programs. Core capabilities of Dimagi's tracking system solutions include:

- **Low-code configuration.** Forms, fields, and workflows are built and changed through CommCare's application builder rather than custom software development. When a program adds or revises an outcome measure, the system can be updated with drag-and-drop, intuitive tooling that reduces the resources needed to maintain the solution over time.
- **A flexible data model built for reporting.** CommCare's data structure lets administrators create record types and fields aligned to specific reporting requirements, and link related records, for example intake, follow-up, and discharge records tied to a single treatment episode, so episodic data stays connected for reporting. This is paired with a data lake built on a medallion architecture, with raw, integration, and presentation layers configured for each state, so downstream reporting reflects that state's specific data model rather than a fixed schema.
- **Data quality controls.** Field-level validation, conditional form sections, and structured selection lists reduce entry errors at the point of collection. Required-field settings can block incomplete records from being submitted for downstream reporting.
- **Deduplication and identity matching.** The platform reconciles records for the same individual across time and across data sources. This capability supported Colorado's MAT Central Registry, where automated deduplication resolved more than 6,600 duplicate enrollment instances.

Provider-friendly design

Dimagi configures provider-facing workflows directly with the staff who use them, using responsive forms that reveal or auto-populate fields based on prior entries, deep-linked reminders that route providers straight to the form they need, and role-based views that show each user only what's relevant to their role. Where a provider's existing systems support it, Dimagi pulls outcome data through automated integrations rather than requiring manual entry, and offers multiple integration pathways, from full API-based data exchange to manual entry, so providers at different levels of technical readiness can participate without a uniform infrastructure requirement.

Figure 1. Example Referral Request Form



Behavioral Health Provider ... > Search for Beds > Referral Request

REFERRAL REQUEST

This request will contain the following information.

Service Requested:
Substance Use Services

From:

Facility Name	Address	Phone	Fax
North Star Behavioral Health – Alpine Academy	1500 Debarr Circle, Anchorage, AK 99508	(907) 258-7575	(907) 865-7110
Edit Information			

To:

#	Facility Name	Address	Phone	Fax
1	Stepping Stones	260 West Benson Boulevard, Anchorage, AK 99503	(907) 565-1200	(907) 258-6052
2	Genesis Recovery Services, Inc	2825 West 42nd Avenue, Anchorage, AK 99517	(907) 243-5130	(907) 248-8350

* Assigned Sex at Birth: Female
* Gender: Non-binary
* Age: Youth (17 and under)
* Payment: All Payers

Substances Involved: Alcohol, Opioids

Notes: Patient received Medication-Assisted Treatment (MAT) and individual therapy for opioid use disorder. Referral is being made for a higher level of care due to continued use and risk of overdose.

File Upload
Upload referral packet, clinical assessments, or medical records as needed
Choose File Doe_Jane-referral_packet_20230501.pdf

* Client consented to submit this referral? Yes

Submit

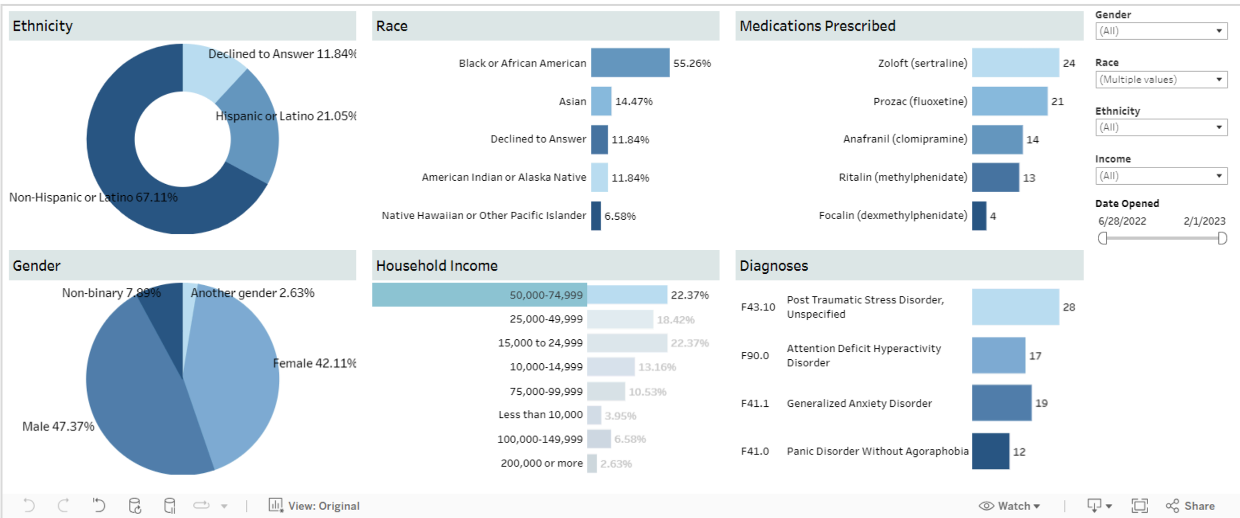
Reporting and Analytics

CommCare and our integrated data tools include Snowflake for data warehousing and Tableau for dashboards and reporting. States can use this reporting layer directly, or integrate the data into their own analytics environment through APIs and standards-aligned data exchange. This same configurable approach has supported federal reporting obligations tied to specific funding requirements, including SAMHSA's TEDS reporting for Colorado BHA, and can accommodate new or revised federal reporting requirements as they are announced.

Access Control and Data Privacy

Access to this data is role-based and organization-based, and can be limited to assigned patients, geographic regions, or other implementation-specific criteria. Reports can also be configured to present aggregate or deidentified data where full record-level access is not appropriate, letting a state limit access to identifiable SUD records in line with 42 CFR Part 2 while still supporting program-wide outcome reporting. Section 3.3 details Dimagi's full security and privacy compliance posture.

Figure 2. Example Image of Embedded Tableau in CommCare



Beyond Outcome Tracking

Dimagi's tracking system solutions also support central registries and referral coordination, including Colorado's MAT Central Registry and Pennsylvania's prevention program tracking. The same platform handles these adjacent workflows within a single system, avoiding the need for separate point solutions for each function.

Alignment with the Statewide Data Spine

West Virginia is separately procuring a Statewide Data Spine under RHTP to serve as the foundational infrastructure integrating clinical, claims, community, workforce, and public health data across the Connected Care Grid. Dimagi's tracking system connects to this infrastructure once it is established.

The same medallion-architecture data lake and Snowflake-based reporting layer support data transformation aligned to industry standards including HL7 and FHIR. As part of this architecture, Dimagi builds a presentation layer: a set of views prepared specifically for downstream use by other systems or reporting tools. This layer is built from configured queries and view definitions, not custom-developed software, so Dimagi can format data to match a specific target model, such as a Common Information Model the state adopts for the Data Spine, without building a separate integration system. This is a per-implementation configuration step. Dimagi has applied the same pattern in both Colorado BHA and the Commonwealth of Pennsylvania, carrying reusable structures into how it approaches each new target format.

3.2 Response to Specific Questions

3.2.1. Outcome Measures Tracked in Current Implementations

Dimagi's tracking system solutions play a part at multiple levels of the reporting landscape, from the point of care to statewide public reporting. Colorado BHA's implementation illustrates how this works in practice.

How Measures Are Captured and Reported for Colorado BHA

Colorado BHA's implementation draws on three layers of Dimagi's platform, each serving a different role in the state's data strategy:

- **Direct capture in CommCare, as part of provider workflows and care coordination:** CommCare is the application providers use to complete intake and coordinate referrals, so this data is captured as a byproduct of the workflow itself, not through separate reporting. Additional discrete reporting data can be collected through data entry forms on CommCare.
- **Integration with external clinical and agency data sources, through the data management infrastructure Dimagi built:** As BHA's technology partner, Dimagi established the data integrations, medallion architecture layers, and reporting pipeline that combine CommCare data with external sources such as claims and other agency systems, and continues to maintain and extend that infrastructure as BHA's reporting needs evolve.
- **Publication through Colorado's public Performance Hub**: Dimagi's data infrastructure supports creation of public-facing reports on behavioral health in the state. Many of the measures below are published for public transparency at bha.colorado.gov/data-and-reports/performance-hub.

Measures Tracked

Across these three layers, Colorado BHA tracks measures spanning treatment access, facility capacity, population utilization, acute care events, and long-term retention:

Treatment, enrollment, and referral

- Unique enrollments in medication-assisted treatment (MAT)
- Number of 72-hour holds placed, by reason, initiation, and outcome
- Referrals made and referral disposition or outcome
- Opioid Treatment Program (OTP) measures, including active clients by week, admissions and discharges, and locations by county

Bed capacity and facility data

- Available beds by service level, estimated future availability, baseline and denominator, and admission criteria
- Number of residential beds for SUD treatment in Colorado, by county, service level (ASAM), and time

Population-level utilization

- Number of people who received SUD care under a BHA-funded or overseen program, filterable by time, demographics, and location
- Number of people who received publicly funded community mental health services, filterable by time, demographics, location, and association with regional administrative agencies (Behavioral Health Administrative Service Organizations - BAHSOs)
- Number of people with health insurance and at least one claim who received mental health services, filterable by demographics, time, location, acuity, and diagnosis volume

Retention and program planning

- Length of stay in treatment, tracked at both the clinic and statewide level
- Return-to-care rate, showing approximately 26% of patients who leave treatment later re-enter care
- Geographic access gaps, used to inform program expansion decisions such as Colorado's expansion of opioid treatment providers from 25 to 52 locations

Additional Upcoming Implementations

With the **Commonwealth of Pennsylvania**, Dimagi's planned SUD Treatment Module is scheduled for the first phase of implementation, occurring 12 to 15 months into the engagement with the Department of Drug and Alcohol Programs. Planned data categories include:

- GPRA episodic outcome data, including intake, follow-up, and discharge records tied to a client's treatment episode
- TEDS clinical, treatment, and outcomes data aligned to state and federal reporting specifications
- Admission, discharge, and capacity tracking for medication-assisted treatment and other treatment types
- Prevention program tracking, including plans segmented by funding source

The specific outcome measures within these categories will be finalized during implementation, in the same collaborative process Dimagi used with Colorado BHA to define measurement standards.

With the **City of Philadelphia,** Dimagi is currently implementing a Unified Bed Registry (UBR) for the Department of Behavioral Health and Intellectual disAbility Services, with planned go-live in 2026. The system tracks real-time bed availability and capacity across levels of care, referral activity and disposition, and Crisis Response Center (CRC) divert status. Reporting includes utilization and referral reports for DBHIDS staff and providers, plus a public Tableau dashboard on CRC divert status for publication on the City's website, with data integrated into the City's Enterprise Data Warehouse.

3.2.2. Ability to Address a Wide Variety of Outcome Measures

CommCare and our integrated data tools can address these outcome measures through three methods: direct entry into the system, calculation from clinical and claims data, or integration with external agency data sources. Depending on what each source system supports, integration can take the form of secure file transfer, bulk import, or API-based integration, including FHIR. The right approach for each measure depends on what data sources West Virginia has available, providers' integration readiness, and how the state wants to govern the underlying data model. That determination should be made collaboratively, grounded in provider technology capabilities and aligned to 42 CFR Part 2 consent procedures.

Direct entry

Providers without the ability to integrate structured data, or measures that lack an obvious structured data source, can be captured through direct entry into CommCare's configurable forms. This could also be used for any data capture desired, including clinical data, social determinants data, etc.

Clinical and claims data integration

Where structured clinical and claims data is available, whether through state infrastructure or direct connections to EHRs or clinical data repositories, CommCare can calculate outcome measures directly from that data instead of requiring manual entry. Data well suited for this method include readmission, follow-up, and primary care connection outcomes.

Depending on what WV's providers currently submit, this pathway could also extend to social determinants of health tracking, medication-assisted treatment status, and verified abstinence, if those data elements are captured in usable form.

Integration with external agency data sources

In addition to clinical and claims data, CommCare can accept data from external agency sources to support measures that fall outside a typical behavioral health data infrastructure. These could include housing, employment training, benefits enrollment, and criminal justice data. This depends on data-sharing arrangements and aligning identity matching across sources. Establishing these feeds is as much a governance and data-sharing exercise as a technical one.

Determining Feasibility

Colorado's approach offers a relevant model for how this determination could happen. BHA convened providers, counties, and other stakeholders through a multistakeholder framework to define measurement standards for its Performance Hub, documented publicly at bha.colorado.gov/data-and-reports/performance-hub/performance-hub-framework. Dimagi can offer technical partnership for a similar collaborative approach with West Virginia to confirm which measures are best captured directly, which can be calculated from data already flowing through the system, and which require new data-sharing relationships with other state agencies.

3.2.3. Solutions Designed for Provider Acceptance

Reporting and tracking systems require a user-friendly interface and a low burden on the providers, while ensuring a high quality of data. CommCare's form and workflow tools, including responsive fields, role-based views, and point-of-entry validation, are built to make routine reporting fast and straightforward for the people using it daily. Dimagi configures these workflows directly with provider staff, building for usability from the outset. Colorado's Behavioral Health Administration (BHA) Central Registry, built on CommCare, illustrates both the adoption results and the design principles Dimagi would bring to a West Virginia tracking system.

A platform that evolves with provider needs

Because CommCare is a low-code platform, BHA has been able to reconfigure workflows as program needs changed rather than requiring new development for each change. Over the past year, Dimagi's BeHealth team has supported BHA's growing reporting needs, including regular and ad hoc Tableau dashboards and federal reporting, and built compliance and performance monitoring reports so BHA can track the two Behavioral Health Administrative Service Organizations (BHASOs) accountable for provider oversight in each region. These additions were configured on the existing platform, not built as separate systems. A WV tracking system built on the same foundation could adapt as the State's outcome measures and reporting requirements change, without a new procurement cycle for each update.

Provider-friendly design features

Three configuration patterns from Dimagi's CommCare implementations directly reduce provider reporting burden:

- **Responsive forms.** Forms reveal, hide, or auto-populate fields based on what a provider has already entered, and can limit response options to what's valid for a given case. This reduces the number of fields a provider must complete manually and improves data quality by constraining entry errors at the point of collection.
- **Deep-linked reminders.** Reminder emails link directly to the specific form a provider needs to complete, rather than to a general login page, cutting the steps required for recurring or periodic submissions.

- **Point-of-entry validation.** Forms apply configurable, human-readable error messages and can flag inconsistencies, such as mismatched demographic totals across related fields, before a provider submits a record.
- **Role-based views.** Providers see only the forms, patient lists, and data relevant to their role. A frontline intake worker and a program administrator see different interfaces built on the same underlying application, so neither is exposed to information or workflow steps outside their responsibility.
- **Data entry options matched to provider capacity.** Providers can enter outcome data directly, or CommCare can receive it through integration with existing systems, including secure file transfer, bulk import, or API-based exchange such as FHIR. The right method for each provider and each data source is a determination West Virginia would make with Dimagi based on provider technology readiness.

Evidence from BHA Implementation: Reduced Provider Burden

Colorado's Behavioral Health Administration (BHA) Central Registry, built on CommCare, shows what provider-level adoption looks like once a workflow is configured around how providers actually work. Since 2022, the registry has supported more than 32,000 MAT admissions statewide, replacing a manual verification process that required providers to contact state staff before every intake.

- **Intake time:** 2.25 minutes average, measured through CommCare workflow timestamps, down from a process that previously took several hours to as long as four days.
- **State intervention required:** approximately 3% of admissions, down from 24.09% in 2024, calculated by comparing admissions providers completed independently against those escalated for manual state review.
- **Data quality:** 6,600+ duplicate records identified and resolved to date through automated detection, reducing manual reconciliation work for both providers and state staff.

Providers report that independently querying the registry has accelerated intake and reduced administrative burden. State administrators report spending substantially less time manually reconciling records and coordinating admissions across facilities.

3.2.4. Ensuring the Security and Confidentiality of Data

As a technology partner for government agencies, Dimagi routinely implements solutions that manage protected health information and other sensitive data, including statewide behavioral health programs that require compliance with HIPAA and protections under 42 CFR Part 2. Dimagi has successfully completed numerous state and local security reviews, executes data sharing agreements, and works closely with government partners to align practices with existing ecosystems.

Dimagi protects sensitive data through secure cloud infrastructure and configurable application controls. CommCare is hosted in a secure, ISO 27001-certified environment in the United States. The hosting environment meets FedRAMP, HIPAA, GDPR, and FERPA requirements. Data is encrypted in transit and at rest, and comprehensive audit logs capture changes to system data to support monitoring, compliance, and investigation. Dimagi's control environment aligns with industry-recognized standards and incorporates safeguards consistent with NIST SP 800-53 control families, including access control, contingency planning, system integrity, and audit accountability. Detailed control descriptions and auditor testing results are available in the SOC 2 Type II report, which may be provided to West Virginia under NDA. Dimagi also conducts regular vulnerability assessments and penetration testing to identify and mitigate security risks.

CommCare's configurable user administration allows each implementation to align data access with program and organizational requirements. Role-based and organization-based access controls allow administrators to define which users can view, enter, edit, or report on data. Access can be limited to assigned patients, geographic regions, organizations, or other implementation-specific criteria, including consent as required for 42 CFR Part 2. Reports can also be configured to present aggregate or deidentified data where appropriate, enabling organizations to tailor data visibility to program and reporting requirements.

3.3 Supporting Documents

Dimagi provides the following supporting documents in response to this RFI:

3.3.1 Example Training Materials: Redacted examples of the *Case List Explorer Training* and *User Guide for Clinic and Provider Users* from a statewide behavioral health provider management implementation. These documents demonstrate Dimagi's approach to user onboarding, system training, and end-user documentation. Materials have been redacted to comply with contractual obligations and are tailored and maintained for each client implementation to reflect program-specific workflows, system configuration, and business processes.