



Behavioral Health Information System
(BHIS)

User Manual

Version: 1.0

March 30, 2016



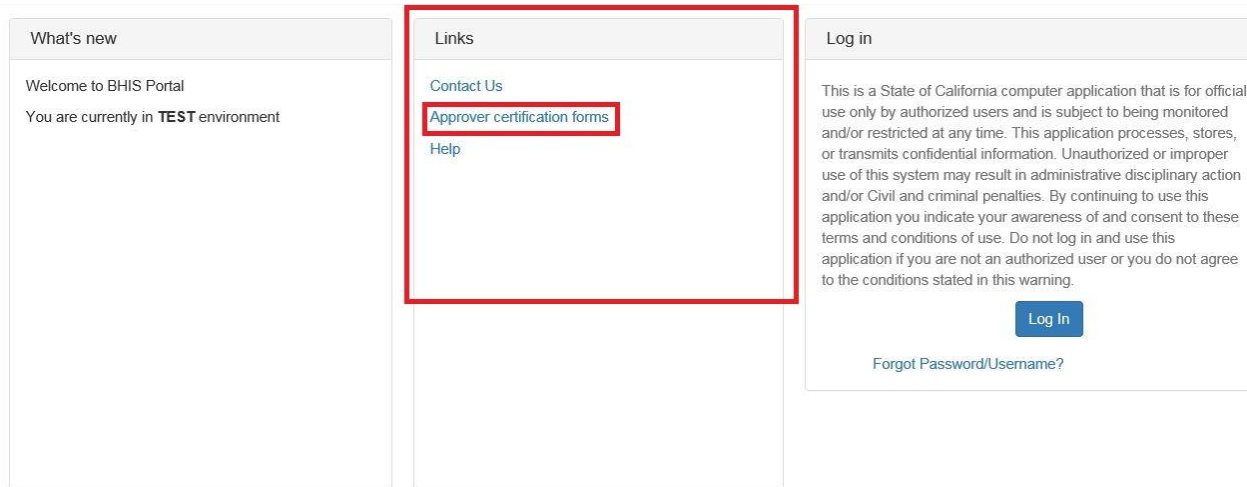
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1.0 Enrollment Process for Approvers

Step #1: The organization head (County Mental Health Director / Alcohol and Drug Administrator) designates two approvers and one Vendor (if applicable) for each system, by submitting the Approver certification & Vendor designation form, to Department of Health Care Services (DHCS). The approver certification forms are available on the BHIS portal website.

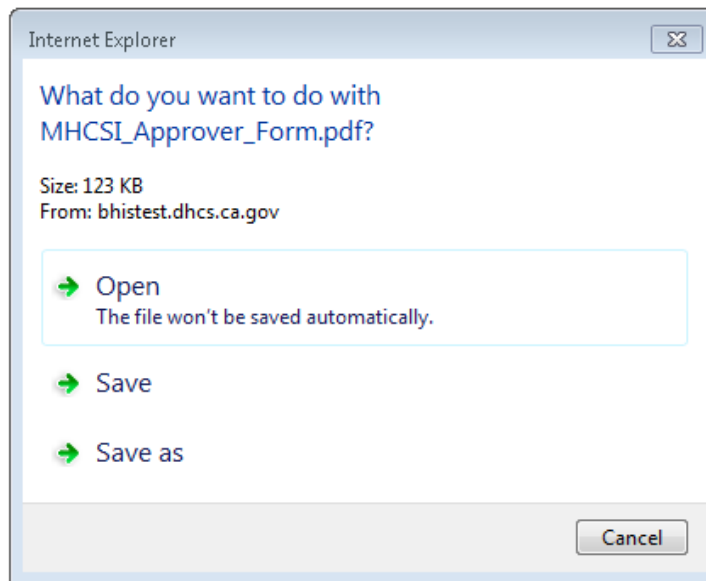
- Please go to BHIS Portal website. There you will find “Approver Certification Forms” in Links section as shown below:



- Once you click on the link you will be redirected to another page where you will find a list of all the systems associated with BHIS Portal as shown below:

Approver Certification Forms		Back
Mental Health Client and Services Information (MHCSI)	This form is for use by the county Behavioral Health director to designate two contacts to be responsible for managing the county and vendor staff (if applicable) access to the DHCS Mental Health Client and Services Information (MHCSI).	Download
Substance Use Disorders Cost Reporting System (SUDCRS)	This form is for use by the county alcohol and drug program (AOD) administrator to designate two contacts to be responsible for managing the county and vendor staff (if applicable) access to the DHCS Substance Use Disorders Cost Reporting System (SUDCRS).	Download

- Please click on the Download button for the appropriate system you wish to be an Approver for. At this time you will be given the option to save the file on your local machine or to Open the file directly as shown below:



- Please choose your option and fill in the form completely with the appropriate information.
- Once filled and signed, please send the form to the appropriate e-mail address as mentioned in the Instructions section of the downloaded form.

Step #2: DHCS processes the approver and vendor certification forms and creates the user accounts for the designated approvers, and assigns them Approver role in the BHIS Portal for both Production and Staging environment.

Step #3: Approvers receive an encrypted email (refer to Section 6.0 for How to open encrypted email) with the assigned username and temporary password. Approvers must change the password using the instructions in the email.

Step #4: Once the temporary password has been changed, Approvers can login to the BHIS portal and manage (Add/Remove/Update) user accounts and user roles. (Approvers will use the same username and password to login to BHIS staging and production portals). Please refer to Sections 4.0 and 5.0 to learn more about managing users and user roles.

2.0 Enrollment process for Users

This section will guide the User on how to get added to the BHIS Portal.

- **Step #1:** New User (county employee or vendor employee) needs to contact the designated county Approver, for the system, to get added to BHIS Portal.
- **Step #2:** Designated Approver creates user profile and assigns Role(s) for the new user
- **Step #3:** DHCS assigns Username, Activates the Username and Grants the Role(s) assigned by the Approver.
- **Step #4:** User receive an encrypted email (refer to Section 6.0 for Instruction to open encrypted email) with the assigned username and temporary password. User must change the password using the instructions in the email.
- **Step #5:** Once the temporary password has been changed, User can login to the BHIS portal. Users can access applications, manage profile information and request additional roles. Please refer to Sections 9.0 and 10.0 to learn more about managing profile information and requesting additional user role(s).

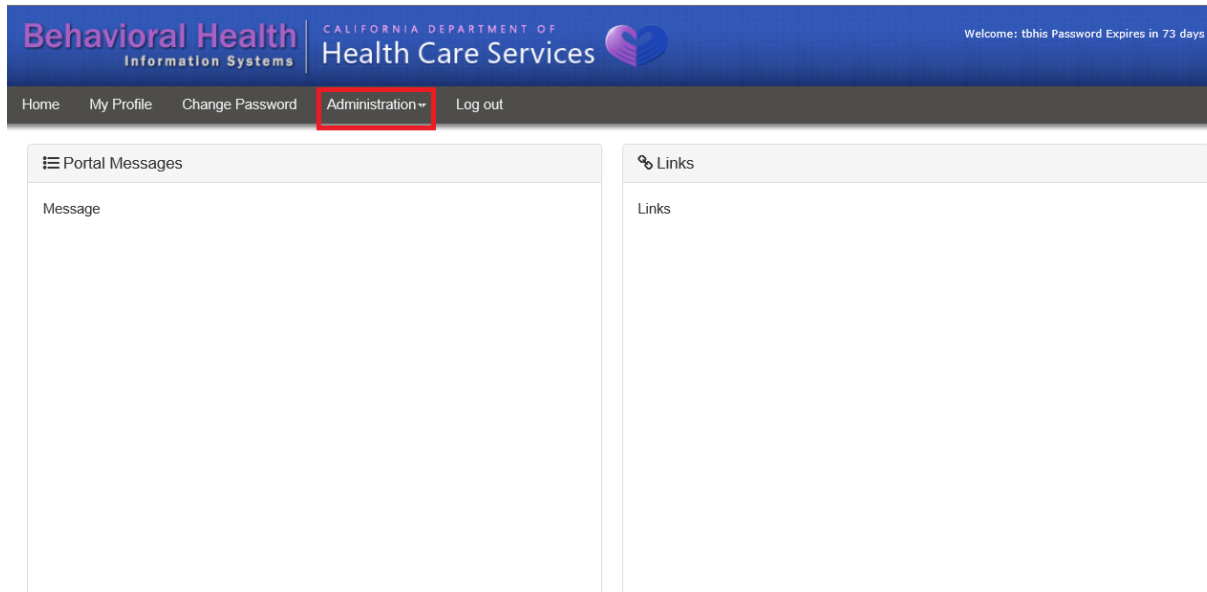
3.0 Staging vs. Production Environment

- BHIS has a Production and Staging environment. The Staging environment is used for testing purpose (User Acceptance Testing (UAT) and Quality Assurance (QA). Personal Identifiers (PI) and Personal Health Information (PHI) information must not be used in the Staging environment.
- Staging Website URL - <https://bhisstage.dhcs.ca.gov/>
- Production Website URL - <https://bhis.dhcs.ca.gov/>
- User access granted in production will not be automatically copied to the staging environment. The Approver must manage Users and User roles separately as required.
- If a User has been granted access to both Production and Staging, DHCS will create only one account. Therefore, the same username and password is used to access both staging and production.

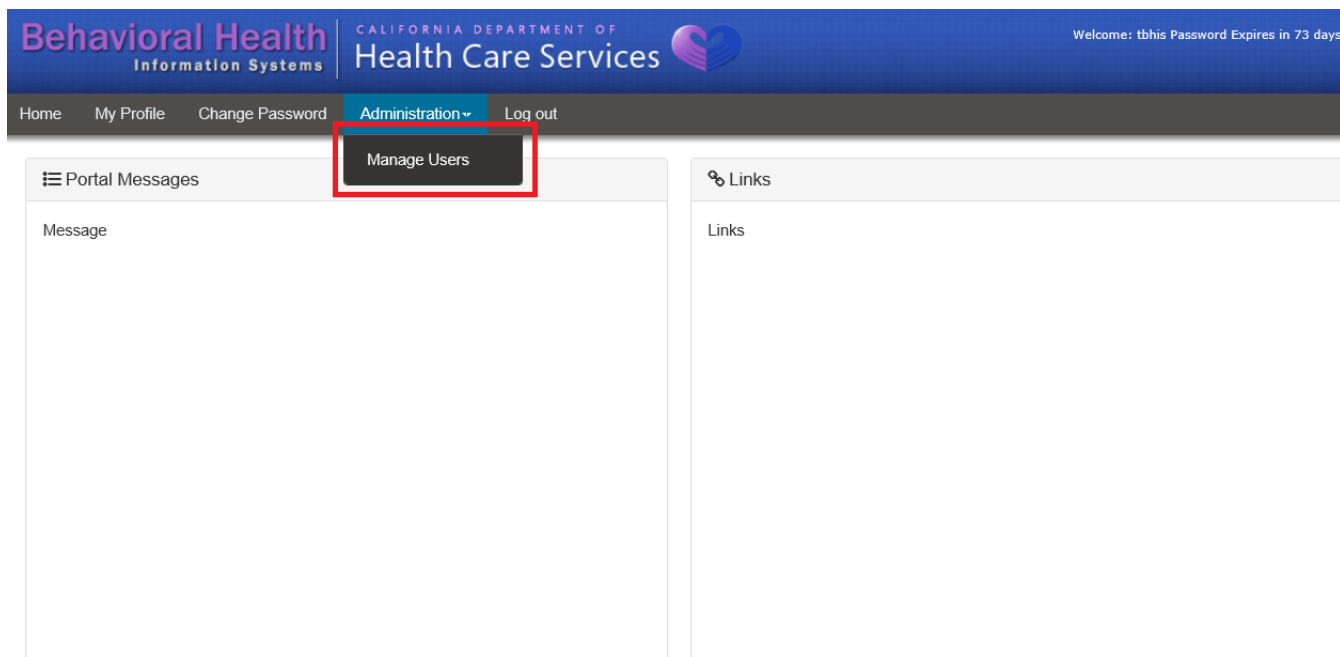
4.0 Manage Users - Applies only to Approvers

This section will guide the Approver to add new Users and remove existing Users for your Employment Organization and vendor Organization (if designated).

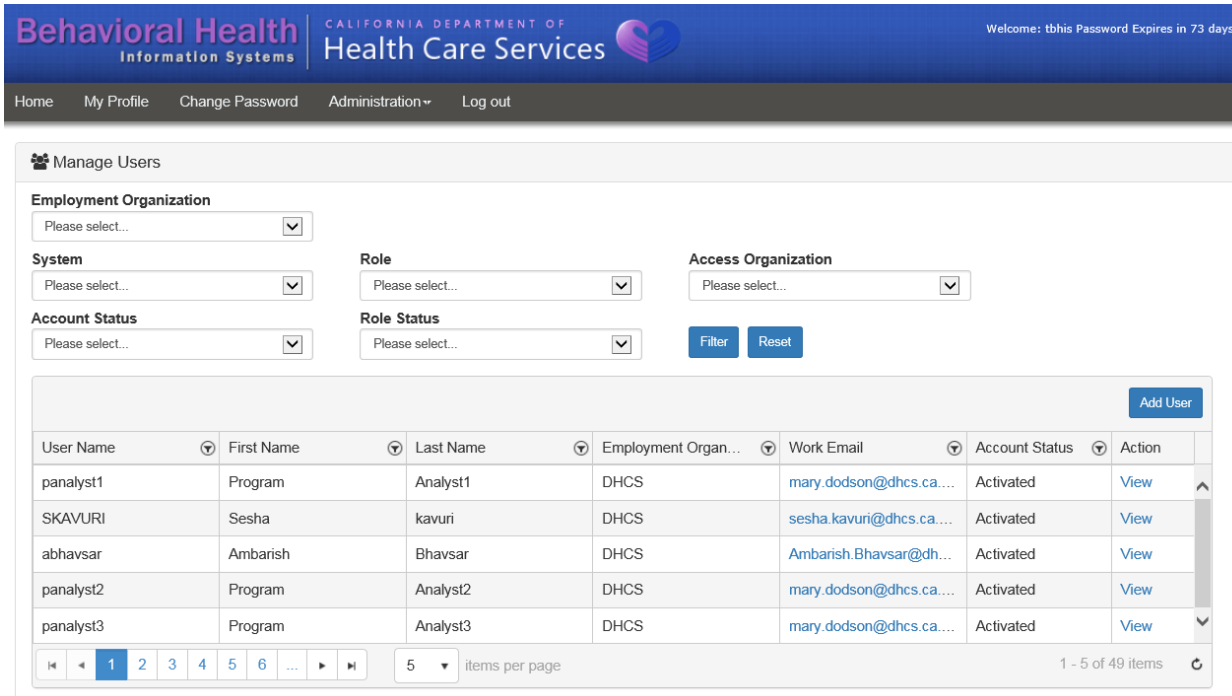
- Please login into the environment that you wish to create Users for. You will find the Administration option within the Menu bar on your Portal landing page as shown below:



- Click on Administration and it will give you an option to Manage Users as shown below:



- Click on Manage Users and you will be redirected to another screen as shown below:



Behavioral Health Information Systems | CALIFORNIA DEPARTMENT OF Health Care Services | Welcome: tbhis Password Expires in 73 days

Home My Profile Change Password Administration Log out

Manage Users

Employment Organization
Please select...

System
Please select...

Account Status
Please select...

Role
Please select...

Role Status
Please select...

Access Organization
Please select...

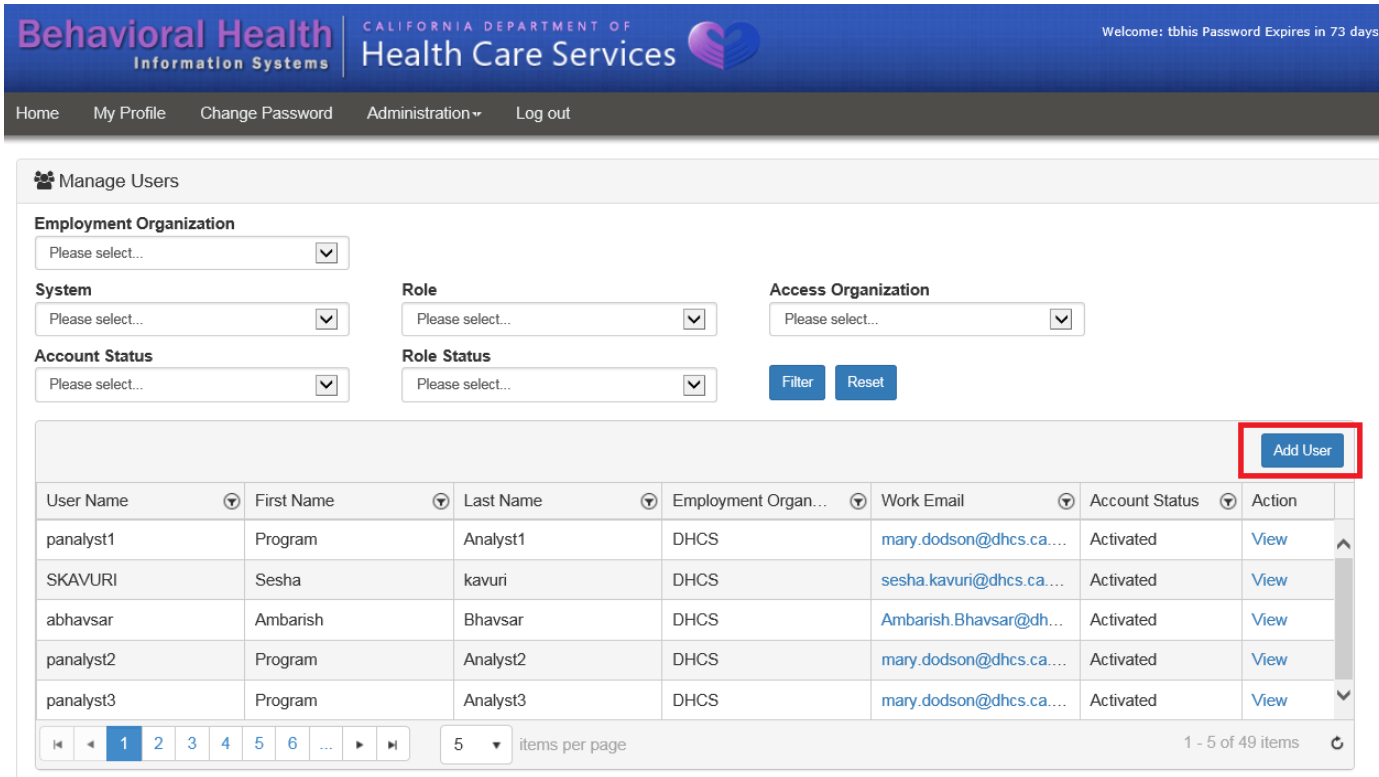
Filter Reset

Add User

User Name	First Name	Last Name	Employment Organ...	Work Email	Account Status	Action
panalyst1	Program	Analyst1	DHCS	mary.dodson@dhcs.ca...	Activated	View
SKAVURI	Sesha	kavuri	DHCS	sesha.kavuri@dhcs.ca...	Activated	View
abhavsar	Ambarish	Bhavsar	DHCS	Ambarish.Bhavsar@dh...	Activated	View
panalyst2	Program	Analyst2	DHCS	mary.dodson@dhcs.ca...	Activated	View
panalyst3	Program	Analyst3	DHCS	mary.dodson@dhcs.ca...	Activated	View

1 - 5 of 49 items | 5 items per page

- In the top section of the Manage Users page you will find various filter options. These options are given for your convenience to find available Users within BHIS Portal.
- Please filter by the First Name and Last Name of the new User you are trying to add to your System and confirm that the User does not exist within the BHIS Portal. If you find a User with a matching First Name and Last Name, please see Section 5.0 Manage User Roles for further details.
- Once you have confirmed that the User does not exist in BHIS Portal, click on Add User as shown below:



Behavioral Health Information Systems | CALIFORNIA DEPARTMENT OF Health Care Services

Welcome: tthis Password Expires in 73 days

Home My Profile Change Password Administration Log out

Manage Users

Employment Organization
Please select...

System
Please select...

Account Status
Please select...

Role
Please select...

Role Status
Please select...

Access Organization
Please select...

Filter Reset

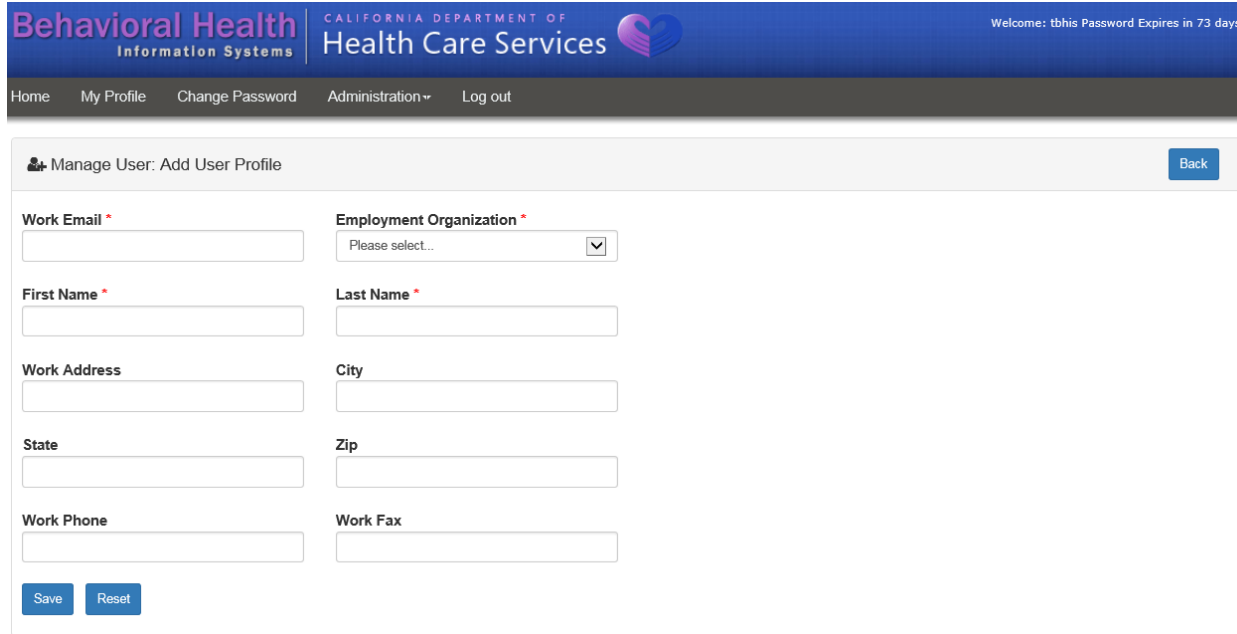
Add User

User Name	First Name	Last Name	Employment Organ...	Work Email	Account Status	Action
panalyst1	Program	Analyst1	DHCS	mary.dodson@dhcs.ca...	Activated	View
SKAVURI	Sesha	kavuri	DHCS	sesha.kavuri@dhcs.ca...	Activated	View
abhavsar	Ambarish	Bhavsar	DHCS	Ambarish.Bhavsar@dh...	Activated	View
panalyst2	Program	Analyst2	DHCS	mary.dodson@dhcs.ca...	Activated	View
panalyst3	Program	Analyst3	DHCS	mary.dodson@dhcs.ca...	Activated	View

5 items per page 1 - 5 of 49 items

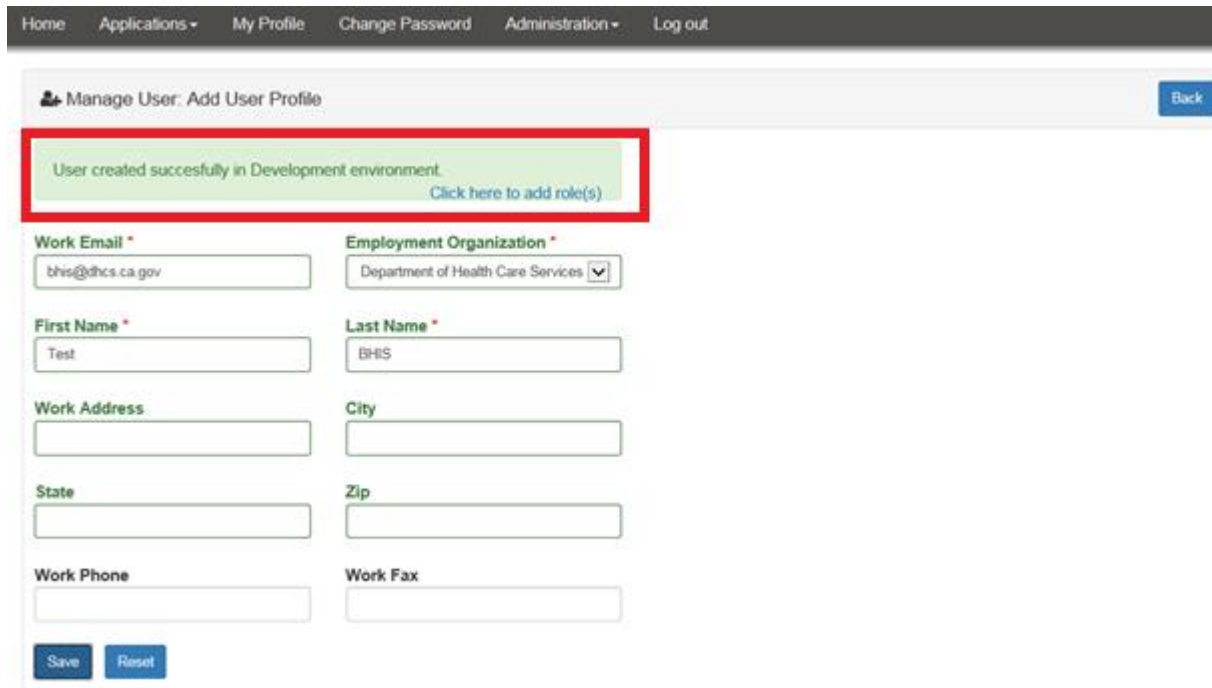
- This will take you to another screen wherein it will ask for following User details (where * denotes required fields):
 - User Work E-mail*
 - User Employment Organization*
 - User First Name*
 - User Last Name*
 - User Work Address
 - User Work City
 - User Work State
 - User Work Zip
 - User Work Phone

○ User Work Fax



The screenshot shows a web interface for adding a user profile. At the top, there is a blue header with the text "Behavioral Health Information Systems" and "CALIFORNIA DEPARTMENT OF Health Care Services". A navigation bar below the header contains links for "Home", "My Profile", "Change Password", "Administration", and "Log out". A welcome message on the right says "Welcome: tthis Password Expires in 73 days". The main content area is titled "Manage User: Add User Profile" and includes a "Back" button. The form contains several input fields: "Work Email *", "Employment Organization *" (a dropdown menu with "Please select..." and a downward arrow), "First Name *", "Last Name *", "Work Address", "City", "State", "Zip", "Work Phone", and "Work Fax". At the bottom of the form are "Save" and "Reset" buttons.

- Please complete all the available information and click on the Save button
- If the User is created successfully you will receive a confirmation message as shown below:



Home Applications - My Profile Change Password Administration - Log out

Manage User: Add User Profile [Back](#)

User created successfully in Development environment.
[Click here to add role\(s\)](#)

Work Email * Employment Organization *

First Name * Last Name *

Work Address City

State Zip

Work Phone Work Fax

[Save](#) [Reset](#)

- You can refer to Section 5.0 Manage User Roles for adding roles to a newly added User.
- Following is the list of all the available User Account Status' and their brief descriptions:
 - Pending, waiting for DHCS to Activate – Approver has added a new User account in BHIS Portal. DHCS will be notified with the new User details. DHCS will create username and temporary password and will send out an Encrypted e-mail to User's Work e-mail address. User will have to change this temporary password into a more permanent password using the link given in the encrypted e-mail. Only after a permanent password is created the user can log onto BHIS Portal with the username and password.
 - Activated - Approver has added a new User account in BHIS Portal. DHCS has confirmed the username and password has been created for the same User.
 - Pending, waiting for DHCS to Deactivate – Approver has sent in a request to remove a User account from BHIS Portal. DHCS will be notified with the User details. DHCS will perform the necessary action to remove the User from the system.

- Deactivated - Approver has requested to remove a User account from BHIS Portal. DHCS has confirmed removal of the account for the same User.

5.0 Manage User Roles - Applies only for Approvers

This section will guide the Approver to add, remove or modify User Roles from an existing User's Profile for your Employment Organization and vendor Organization (if designated).


- Please login into the environment that you wish to add, remove or modify User Roles.
- You will find the Administration option within the Menu bar on your Portal landing page.
- Click on Administration and it will give you the Manage Users option.
- Click on Manage Users and you will be redirected to another screen.
- In the top section of the Manage Users page you will find various filter options. These options are given for your convenience to find available Users within BHIS Portal.
- Please filter by First Name and Last Name of the User you are trying make changes to the user roles. If the User does not exist in BHIS Portal then please refer to Section 3.0 Manage Users for further details.
- Once the User is found click on the View link next to the User and it will redirect you to another screen where you will see User Profile Information as well as the User Role History in a grid view.
- Make sure that the requested User Role does not exist in the list already and then click on the Add button for adding a new role or Edit button to modify an existing User Role.
- Following is the list of status' you will find in the User Roles grid view and their descriptions as stated below:
 - Pending, waiting for approval – User has sent in a request to get added to a specific User Role and the request is pending for an Approver's approval.
 - Approved, waiting for DHCS to Grant – The Approver has Approved the User request. DHCS gets notified of the User Role modification. DHCS will take necessary action to Grant the access as per User Role requested.
 - Granted – The User Role has been granted by both Approver and DHCS.
 - Denied – The User Role request has been denied.

- Removed, waiting for DHCS to Revoke – The Approver has removed a User Role from User’s Profile. DHCS gets notified of the User Role modification. DHCS will take necessary action to revoke the access as per Approver’s request.
- Revoked – The User Role was granted at some earlier Date and has been revoked.


6.0 How to open Encrypted E-mail

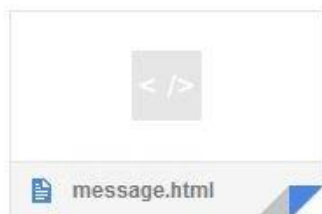
- Once a new account is created in the BHIS Portal, the User/Approver will receive an Encrypted e-mail from “BHIS@dhcs.ca.gov” as seen below: (depending on the setting of your browser you may have to turn off the pop-up blocker the instructions are given at the bottom of this document)

 **BHIS@dhcs.ca.gov** via departmentofhealthcareservices.onmicrosoft.com
to me 

You've received an encrypted message from BHIS@dhcs.ca.gov
To view your message
Save and open the attachment (message.html), and follow the instructions.
Sign in using the following email address: 

This email message and its attachments are for the sole use of the intended recipient or recipients and may contain confidential information. If you have received this email in error, please notify the sender and delete this message.

 Message encryption by Microsoft Office 365



- If you click on the message file (the attachment) it will take you to another screen as shown below:

Encrypted Message

Encrypted message

From
BHIS@dhcs.ca.gov

To

[Redacted]

To view the message on your computer...

Save and open the attachment (message.html), and then follow the instructions from there.

To view the message on an iPhone or iPad...

Open the message again, tap and hold the attachment, and select **Open in OME Viewer**.

If you don't have the OME Viewer app, [download it now](#).

To view the message on an Android device...

Open the message again, tap the attachment, and select **OME Viewer**.

If you don't have the OME Viewer app, [download it now](#).

To view the message, sign in with a Microsoft account, your work or school account, or use a one-time passcode.

[→ Sign in](#)

[→ Use a one-time passcode](#)

- Please click on the “Use a one-time passcode” link and you will be directed to another screen as shown below:

Encrypted Message

We sent a passcode to [REDACTED]

Please check your email, enter the passcode that corresponds with the reference code, and click continue. The passcode will expire in 15 minutes.

Reference code: 5123

Passcode

This is a private computer. Keep me signed in for 12 hours.

[→](#) Continue

[Didn't receive the passcode? Click here to get another one.](#)

- As mentioned on this page, please refer to your work e-mail inbox for an e-mail from “MicrosoftOffice365@messaging.microsoft.com” for the one time passcode. You will receive an e-mail as shown below:

 **Microsoft Office 365 Message Encryption** <MicrosoftOffice365@messaging.microsoft.com>
to me ▾

 Office 365

Use the passcode to sign in

68977588

To view your message, type the passcode into the web page where you requested it. This passcode matches reference code 5123.

NOTE: This passcode expires 15 minutes after it was requested.

This message is automatically generated. Please don't reply to it.

- Use the passcode in the e-mail from “MicrosoftOffice365@messaging.microsoft.com” as shown above and input it into the “Passcode box” as shown in the previous screenshot. Once done correctly you will be directed to the actual e-mail from “BHIS@dhcs.ca.gov” with your BHIS Portal username, a temporary password and a link to change the password to access BHIS Portal.

Encrypted Message

BHIS Web Admin Utility Notification [secure]



DHCS BHIS <BHIS@dhcs.ca.gov>

To: [REDACTED]

Here is your User Name and new temporary password for your BHIS Extranet Account.

Your User name is: [REDACTED]

Your New Temporary Password is: X_o3wN7%H

Please click the link below to update your account information and to create your permanent password.

<https://ext2.dhcs.ca.gov/WebPassMgr/default.aspx>

If the above link is not clickable then copy and paste it into your web browsers address bar.

Note: Please change your password within four (4) days from today's date or your account may become inactive and your password will need to be reset.

Please make a note that the temporary password sent here must be changed before you login for the first time to the BHIS Portal. Under no circumstance should you use the temporary password given to login to the BHIS Portal.

- Please click on the link, provided in the email, and follow on screen directions to change the temporary password.

7.0 How to turn off POP-UP blocker

Internet Explorer

- a. Go to Tools -> Internet Options -> Security -> Trusted Sites -> Sites
- b. Enter "https://*.ca.gov" click Add

Google Chrome

- a. Go to 'Customize and Control Chrome' > Settings > Show Advanced Settings
- b. Under Privacy option, click 'Content settings'
- c. Under Pop-ups, click 'Manage exceptions'
- d. Type in "*.ca.gov" in the Hostname pattern textbox. Make sure the setting selected is 'Allow'
- e. Click Done > Done. Close the Control window

Safari

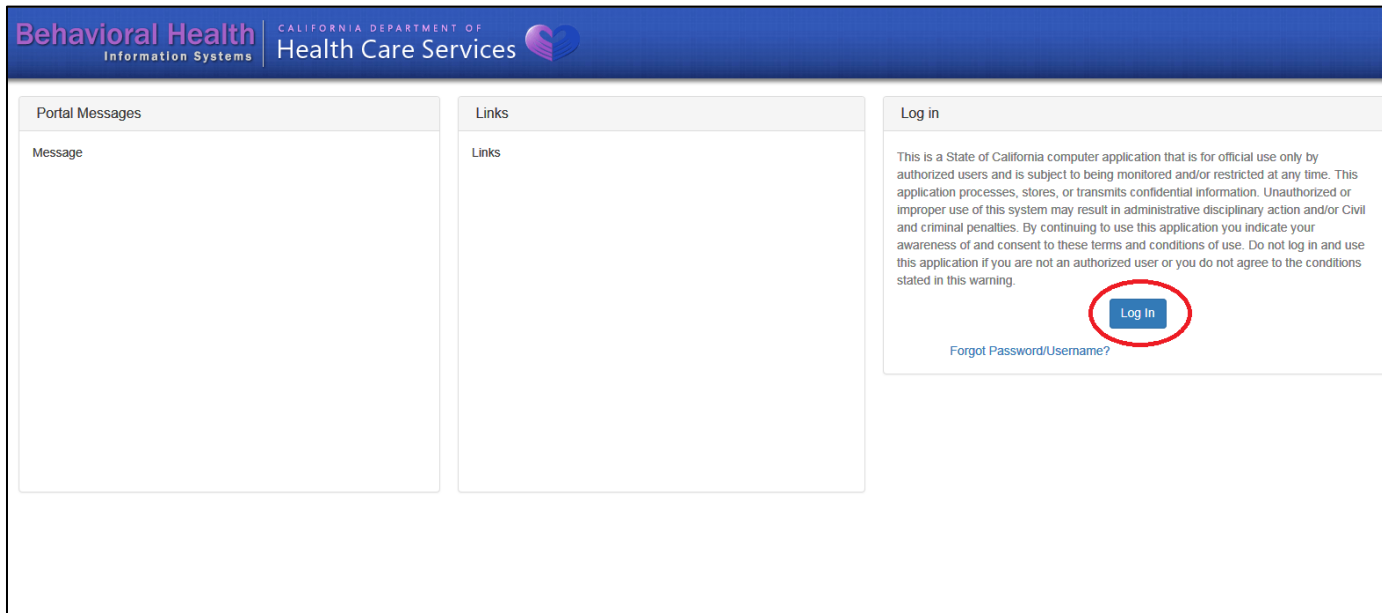
- a. Safari does not have an "allowed sites" function. To enable pop-ups only for certain websites in Safari, you will have to turn off the pop-up blocker while on the site and turn it on again when leaving the site.
- b. Go to Settings > uncheck 'Block Pop-up Windows'

8.0 How to Change the password

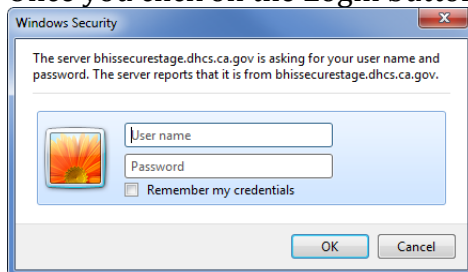
- Please click on the "Change Password" link provided on BHIS (you will be redirected to password change website). Follow the on screen instructions to change the password.

9.0 Manage Profile Information

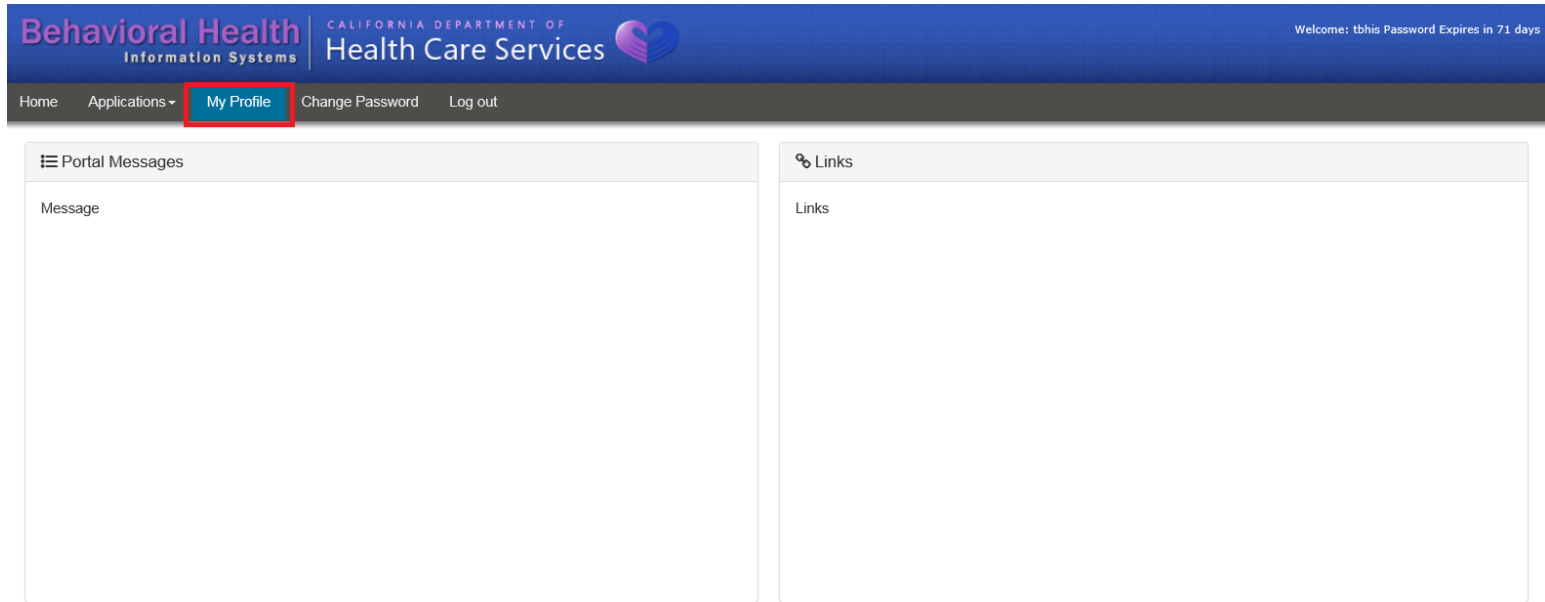
- Please log onto BHIS as follow:



- Once you click on the Login button you will be prompted to enter a username and password.



- Please enter username and password and select OK.
- Now you will see a screen as below:



Behavioral Health Information Systems | CALIFORNIA DEPARTMENT OF Health Care Services

Welcome: tthis Password Expires in 71 days

Home Applications **My Profile** Change Password Log out

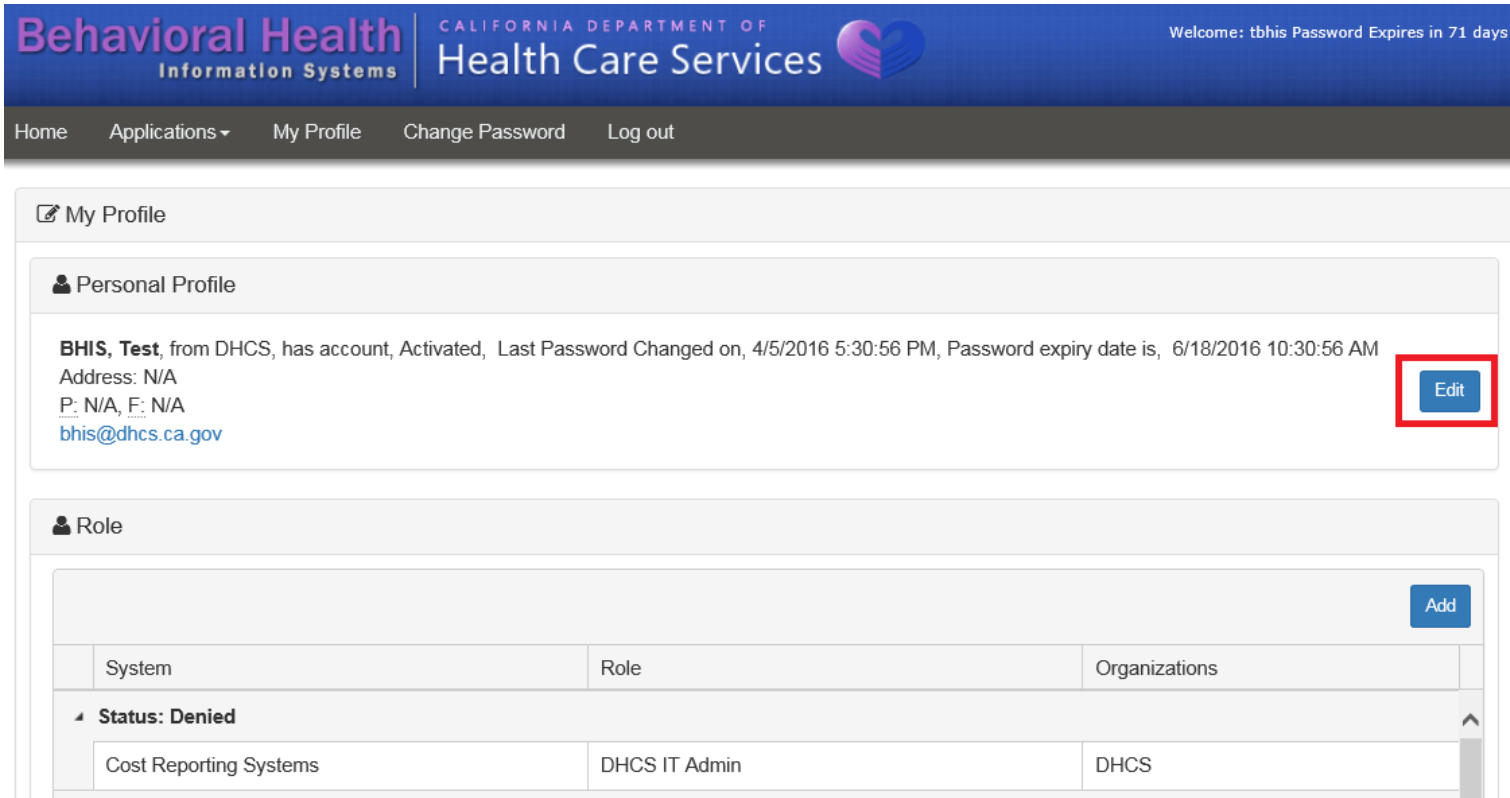
☰ Portal Messages

Message

🔗 Links

Links

- Please click on My Profile and you will see your profile details as follows:



Behavioral Health Information Systems | CALIFORNIA DEPARTMENT OF Health Care Services

Welcome: tbhis Password Expires in 71 days

Home Applications ▾ My Profile Change Password Log out

My Profile

Personal Profile

BHIS, Test, from DHCS, has account, Activated, Last Password Changed on, 4/5/2016 5:30:56 PM, Password expiry date is, 6/18/2016 10:30:56 AM
Address: N/A
P: N/A, E: N/A
tbhis@dhcs.ca.gov

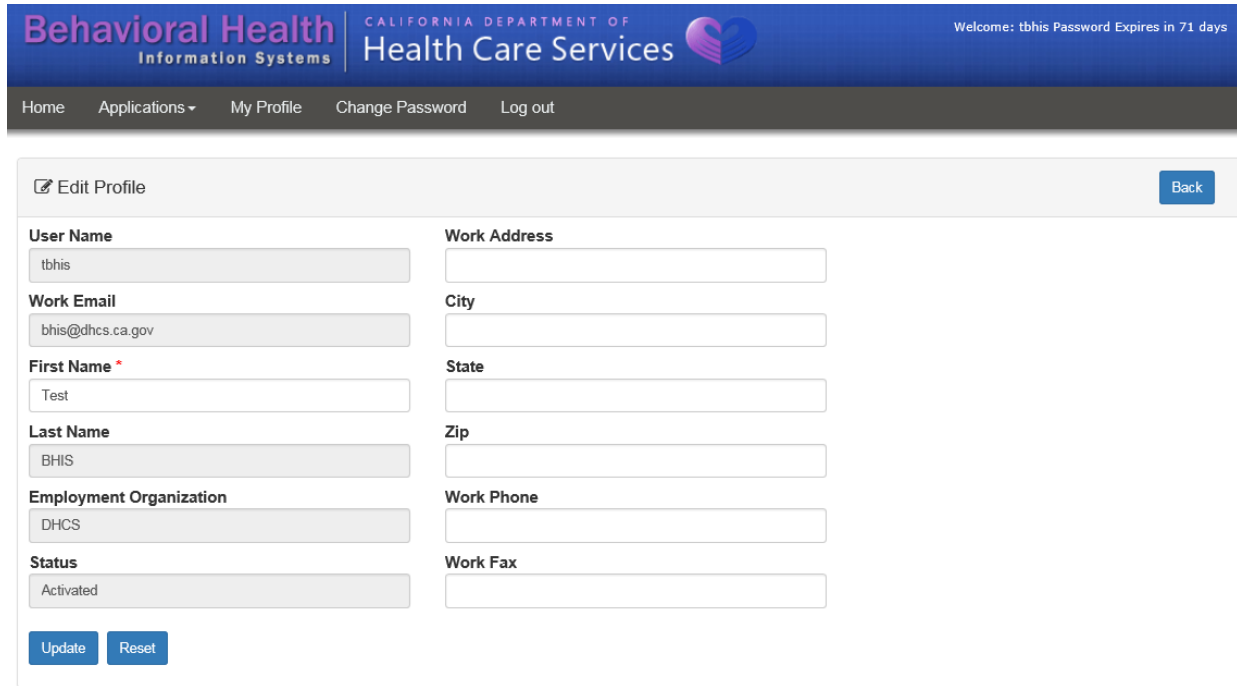
Edit

Role

Add

System	Role	Organizations
Status: Denied		
Cost Reporting Systems	DHCS IT Admin	DHCS

- You can change your Personal Profile information by clicking the Edit button. As you click on the Edit Button you will be directed to the screen as shown below:



Behavioral Health Information Systems | CALIFORNIA DEPARTMENT OF Health Care Services | Welcome: tthis Password Expires in 71 days

Home Applications My Profile Change Password Log out

Edit Profile Back

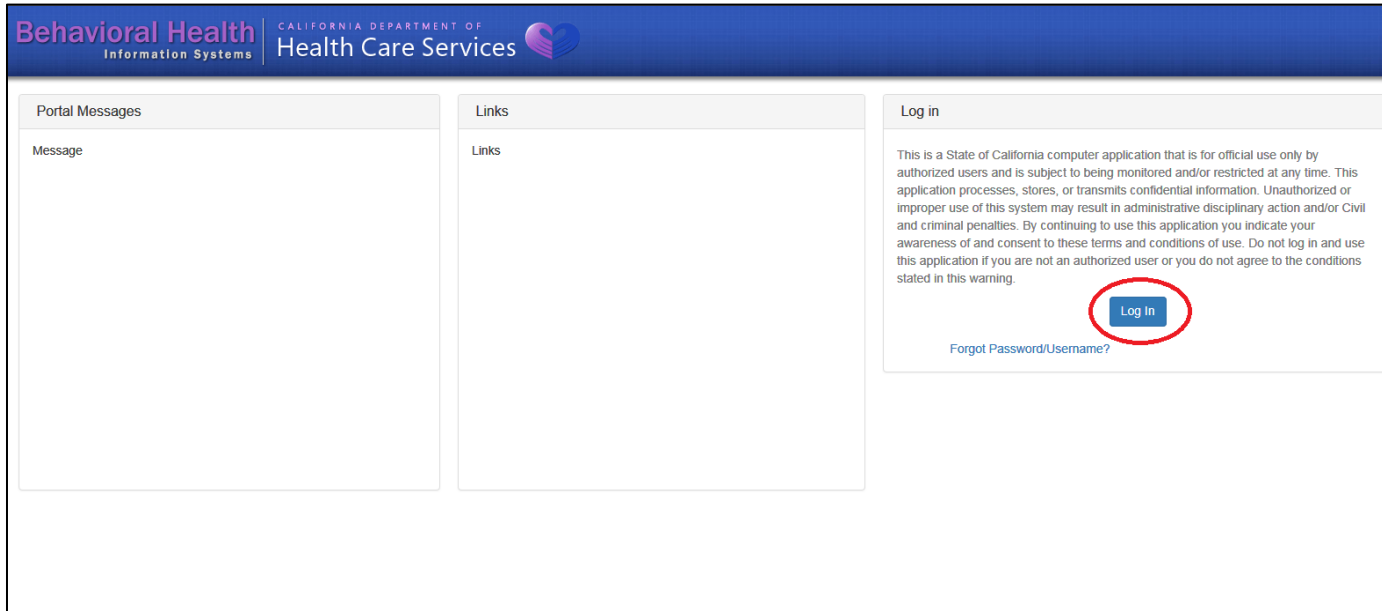
User Name tbhis	Work Address
Work Email bhis@dhcs.ca.gov	City
First Name * Test	State
Last Name BHIS	Zip
Employment Organization DHCS	Work Phone
Status Activated	Work Fax

Update Reset

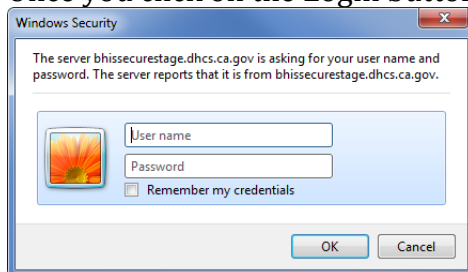
- Here you are allowed to change your First Name, Work Address, Work Phone and Work Fax. You can do that by making changes to the above mentioned fields and clicking on the Update button.
- **You will not be allowed to modify your Username, Work Email, Last Name, Employment Organization and Status. If you need to change any of these, you will need to contact bhis@dhcs.ca.gov.**

10.0 Request Additional Role(s)

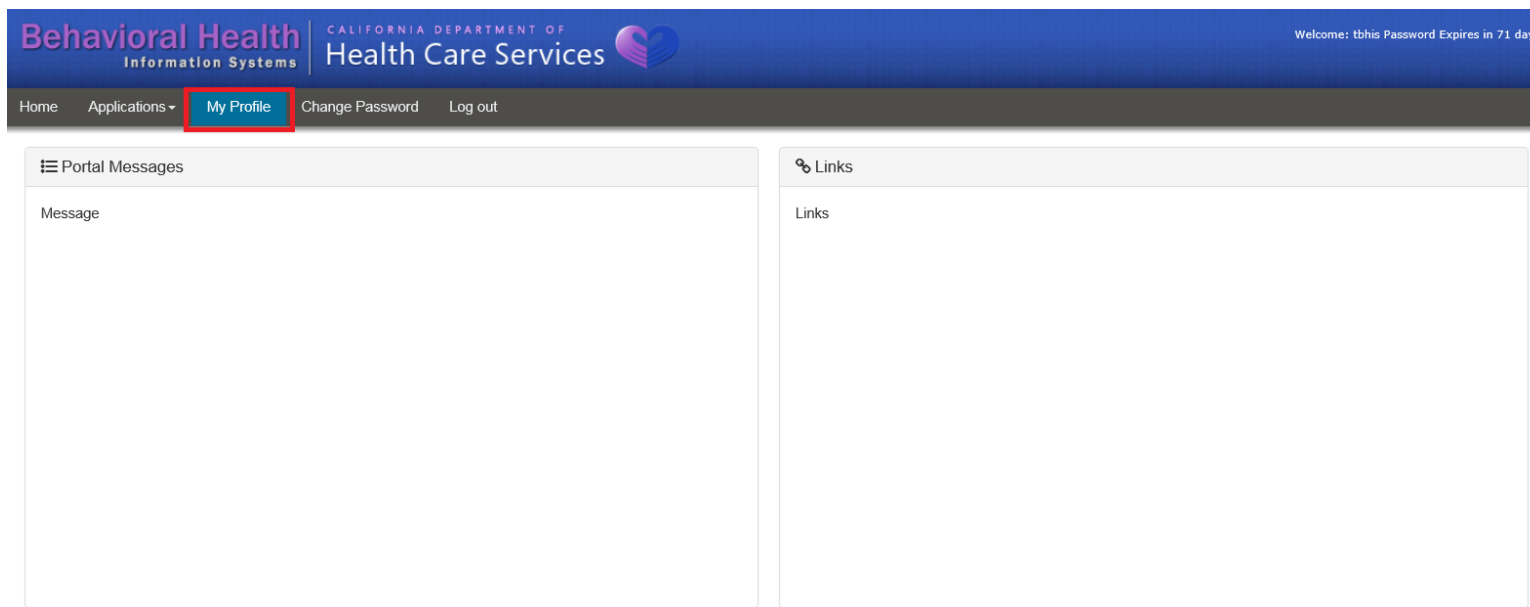
- Please log onto BHIS as follow:



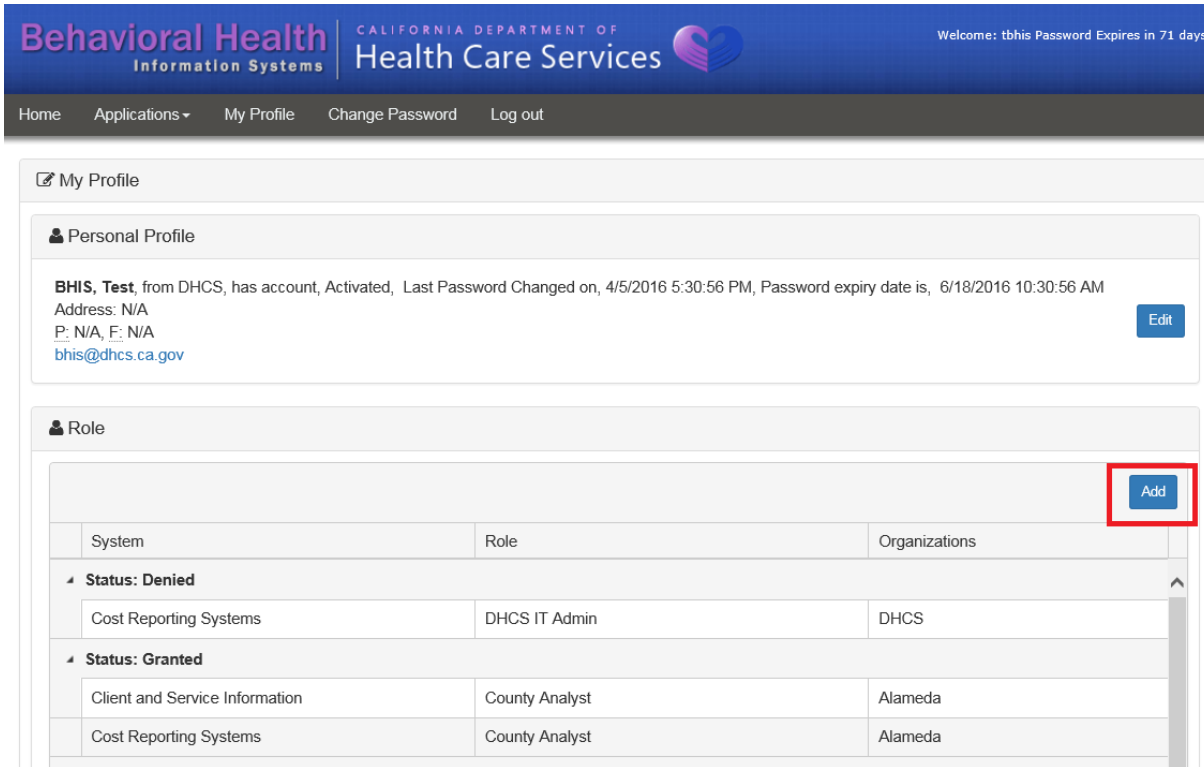
- Once you click on the Login button you will be prompted to enter a username and password.



- Please enter username and password and select OK.
- Now you will see a screen as below:



- Please click on My Profile and you will see your profile details as follows:



Behavioral Health Information Systems | CALIFORNIA DEPARTMENT OF Health Care Services | Welcome: tthis Password Expires in 71 days

Home Applications My Profile Change Password Log out

My Profile

Personal Profile

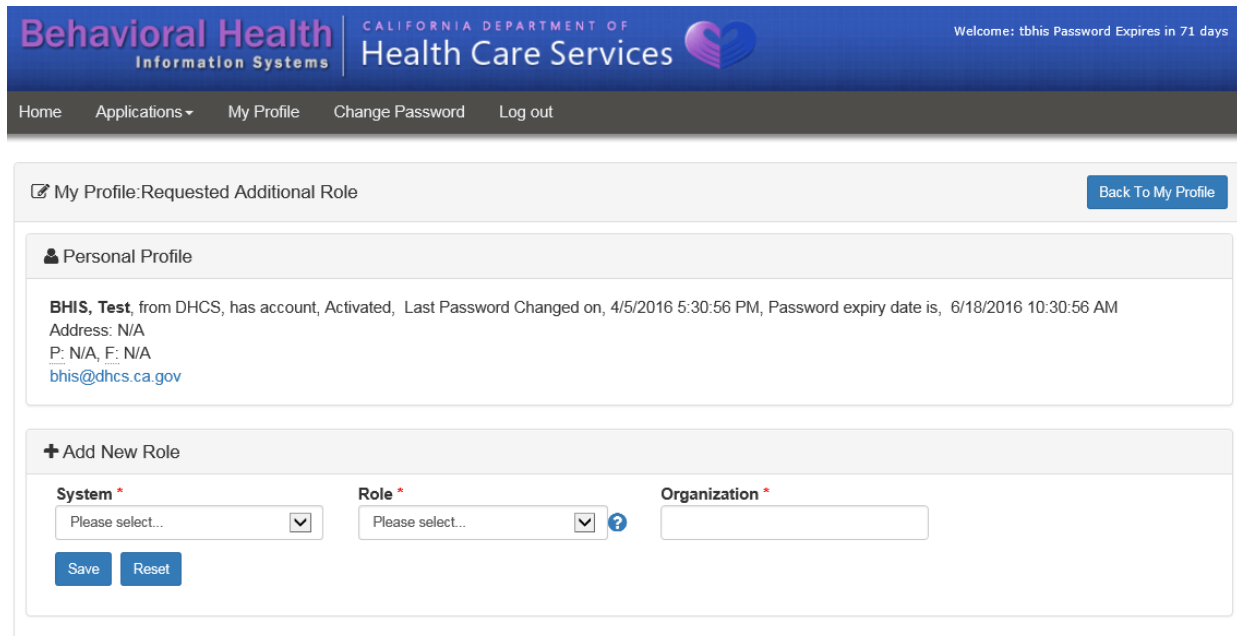
BHIS, Test, from DHCS, has account, Activated, Last Password Changed on, 4/5/2016 5:30:56 PM, Password expiry date is, 6/18/2016 10:30:56 AM
Address: N/A
P: N/A, F: N/A
bhis@dhcs.ca.gov [Edit](#)

Role

System	Role	Organizations
Status: Denied		
Cost Reporting Systems	DHCS IT Admin	DHCS
Status: Granted		
Client and Service Information	County Analyst	Alameda
Cost Reporting Systems	County Analyst	Alameda

[Add](#)

- You can request for additional User Roles by selecting the Add button at the right hand corner of the Role section as shown above. Once the Add button you will be redirected to another screen as shown below:



Behavioral Health Information Systems | CALIFORNIA DEPARTMENT OF Health Care Services | Welcome: tthis Password Expires in 71 days

Home Applications My Profile Change Password Log out

My Profile: Requested Additional Role [Back To My Profile](#)

Personal Profile

BHIS, Test, from DHCS, has account, Activated, Last Password Changed on, 4/5/2016 5:30:56 PM, Password expiry date is, 6/18/2016 10:30:56 AM
Address: N/A
P: N/A, F: N/A
bhis@dhcs.ca.gov

+ Add New Role

System * **Role *** **Organization ***

- Please select appropriate System, Role and Organization from the lists provided and click on the Save button.
- Your request will be directed to the appropriate county provided Approver.
- The decision to accept the requested role(s) will be made by the county provided Approver.

11.0 Password Expiration

- The User will be sent a reminder e-mail to his/her work e-mail address 10 days prior to the password expiration. Please follow the instruction in the email to change the password.
- In the event where the User's account becomes inactive, the User can contact DHCS as mentioned in Section 12.0

12.0 Help

- Please see Contact Us link on the BHIS Portal website as shown below:

What's new

Welcome to BHIS Portal
You are currently in **TEST** environment

Links

- [Contact Us](#)
- [Approver certification forms](#)
- [Help](#)
- [BHIS Development Website](#)
- [BHIS Staging Website](#)
- [BHIS Production Website](#)

Log in

This is a State of California computer application that is for official use only by authorized users and is subject to being monitored and/or restricted at any time. This application processes, stores, or transmits confidential information. Unauthorized or improper use of this system may result in administrative disciplinary action and/or Civil and criminal penalties. By continuing to use this application you indicate your awareness of and consent to these terms and conditions of use. Do not log in and use this application if you are not an authorized user or you do not agree to the conditions stated in this warning.

Note: *BHIS portal does not allow login using temporary passwords. If you have received a temporary password, please follow instructions in the email to reset it before login in.*

[Log In](#)

[Forgot Password/Username?](#)