



California CANS Reporting User Guide

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Overview

This user guide provides the overview of how to run the reports in SmartCare to produce the CANS reporting for the Department of Health Care Services (DHCS). The Child Adolescent Needs and Strengths (CANS) is built for reporting required data to the Department of Health Care Services (DHCS). The data must be submitted to DHCS on a monthly basis. The CANS is to be completed for all children/youth from age 6 through age 20. Data collected in a given must be reported by the last day of the following month. The data will be submitted in batch files.

Reporting Process

Reporting User Interface

Once the data has been collected and is eligible for submission the records are available to be reviewed via the CANS Reporting Summary List Page. There the user can review the available candidate records, errors the records may have and the field level data for each record.

Navigating to the CANS Reporting Summary List Page.

1. Search for the CANS Reporting Summary List Page. (My Office) using the Search icon. Click on the CANS Reporting Summary List Page in the typable drop down. This will open the CANS Reporting Summary List Page.
2. Alternatively, locate the CANS Reporting Summary List Page using the Quicklink if this has been configured in your environment.

CANS Reporting Record Summary List Page (19)

From Date: 08/01/2022 To Date: 10/28/2022 Apply Filter

Record Id: Batch Id: Client Id:

All Programs All Providers All Record Types All selected All Staff All Managing Entities All Batch types All Errors

Select: All, All on Page, None

Record ID	Record Type	Record Status	Errors	Record Date	Client	Program/Provider	Batch Type	Last Batch Submission Date	Last Batch ID
<input type="checkbox"/> 11	CANS	Error	ProviderNumber is Mis...	10/06/2022	Bacon, Crunchy(1008)		CANS		
<input type="checkbox"/> 12	CANS	Error	CIN is Missing,Provide...	10/18/2022	Bacon, Smoked(1020)		CANS		
<input type="checkbox"/> 13	CANS	Error	ProviderNumber is Mis...	10/19/2022	Test, CANS EC(1017)		CANS		
<input type="checkbox"/> 14	CANS	Error	ProviderNumber is Mis...	10/19/2022	Test, CANS EC(1017)		CANS		
<input type="checkbox"/> 15	CANS	Sent	ProviderNumber is Mis...	10/19/2022	Test, CANS(1016)	Outpatient	CANS	10/19/2022	32
<input type="checkbox"/> 16	CANS	Sent	ProviderNumber is Mis...	10/19/2022	Test, CANS(1016)	Outpatient	CANS	10/19/2022	32
<input type="checkbox"/> 17	CANS	Sent	ProviderNumber is Mis...	10/19/2022	Test, CANS(1016)	Outpatient	CANS	10/19/2022	32
<input type="checkbox"/> 9	CANS	Sent	CIN Is Not In Format,...	10/06/2022	Lastname, Client(2)		CANS	10/31/2022	36
<input type="checkbox"/> 10	CANS	Sent	ProviderNumber is Mis...	10/06/2022	Bacon, Crunchy(1008)		CANS	10/31/2022	35

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The CANS Reporting Summary List Page displays all eligible CANS submission records according to the following Status Types:

- In Progress = a record was created but not yet batched for reporting.
- Cancel = a record was created and batched for submission then later canceled. These records are no longer eligible for batching.
- Sent = the record was batched for submission and is awaiting response. These records are no longer eligible for batching.
- Accepted = A response file was received for the batch the record was included in and the record was marked as Accepted. These records are no longer eligible for batching.
- Reject = A response file was received for the batch the record was included in and the record was marked as Rejected. These records are no longer eligible for batching.

There are filters available in the CANS Reporting Summary List Page. These are as follows:

- Select a date range (From Date and To Date) for which data to be pulled for
- Record ID - this is the unique id assigned to the CANS record
- Batch ID - if a record has previously been batched, this field will filter on a specific Batch ID.
- Client ID - this is the unique SC identifier of the client record associated with the CANS record.
- Program - indicates which program the CANS record is associated with
- Provider - if the customer is a County entity and is utilizing MCO, this will indicate which Contracted Provider the CANS record is associated with
- Record Type - this filter allows for differentiating between the different CANS record types; Admission, Annual Update and Discharge.
- Record Status - indicates the current status of the record.
- Responsible Staff - the staff who completed the data collection for the record will display
- Managing Entity - the county that the CANS records are to be reported to may be selected.
- Batch Type - this will default to CANS.
- Errors - this multi select filter will display the applicable errors.

The screenshot shows the 'CANS Reporting Record Summary List Page (19)' with various filter fields. At the top, there are 'From Date' and 'To Date' fields with calendar icons, set to '08/01/2022' and '10/28/2022' respectively. Below these are input fields for 'Record Id', 'Batch Id', and 'Client Id'. A blue 'Apply Filter' button is located to the right of the date fields. Below the input fields are several dropdown menus: 'All Programs', 'All Providers', 'All Record Types', 'All Managing Entities', 'All selected', 'All Staff', 'All Batch types', and 'All Errors'. Each dropdown menu has a downward arrow icon.

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Monitoring Reporting Prior to Submission

To monitor records throughout the reporting period, prior to your submission deadline, you can complete the following steps:

1. Navigate to the CANS Reporting Summary List Page.
2. Review or filter for records in a status of In Progress and/or Error since the last batch creation date or the last review date.
3. For records with a status of Error, use the Record ID hyperlink to navigate to the CANS Record Detail Page to further review of error messages and record data.
4. Work error messages by navigating to the screen in which the source data resides.
5. Once data has been corrected, navigate back to the CANS Reporting Summary List page and use the check box to select the record(s) that have been corrected then select Refresh Data from the Action drop down to pull the corrected data into that record to later be batched for submission.

CANS Reporting Record Detail Page

General			
Record Type ID :	3	Errors :	ProviderNumber is Missing
Record ID :	13	Batch Type :	CANS
Record Type :	CANS	Last Batch Submission Date :	
Record Status :	Error	Record Date :	10/19/2022
Last Batch Id :		program/Provider :	
Client :	Test, CANS EC(1017)		

Administrative Data

Repeat these steps as many times as needed in order to view errors, make corrections and confirm the errors are resolved.

Reporting Summary Widget

Another utility available for monitoring records throughout the reporting period is the CANS Reporting Summary Widget. From the Dashboard a user can review basic statistics of records within a specific day range and Program(s).

1. Navigate to My Office > Dashboard
2. Locate the CANS Reporting Summary Widget
3. Enter a number of past days for which to filter the records.
4. Click the refresh icon in the right hand corner of the widget if filters were modified.
5. Within the widget are hyperlinks that will direct the user to prefiltered list pages where they can review records, modify statuses or work errors as needed.

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CANS Reporting Summary ↻	
Records in Past	<input type="text"/> Days
Total Records	18
Total Unsubmitted Record Count	12
Total Records with Errors	12
Total Records Submitted	6
Total Record Accepted Count	0
Total Record Rejected Count	0
% of Success of Submitted Records	0 %
% of Rejected Count	0 %
Total # of Batches Submitted	13
CIN is Missing or Mismatch	12
CfQ30TraditionsAndRituals is Missing	5
CfQ29Language is Missing	5
CbQ9AdjustmentToTrauma is Missing	5

The CANS Reporting Summary Widget displays the follow information:

- Total Records - distinct count of all records.
- Total Unsubmitted Record Count - distinct count of all records with a status of In Progress, Error, or Canceled. Clicking the number hyperlink will direct the user to the list page pre-filtered for these values.
- Total Records with Errors - distinct count of all records with a status Error. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.
- Total Records Submitted - distinct count of all records with a status Sent. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.
- Total Records Accepted Count - distinct count of all records with a status Accepted. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.
- Total Record Rejected Count - distinct count of all records with a status Rejected. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.
- % of Success of Submitted Records - displays the percentage of records with a status of Accepted of the records sent during the reporting period.

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- % of Rejected Count - displays the percentage of records with a status of Rejected of the records sent during the period.
- Total # of Batches Submitted - this displays the distinct count of batches that were generated during the period. Clicking the number hyperlink will direct the user to the Compliance Batch list page pre-filtered for these values.
- Top 10 Errors - up to 10 errors will display in the last rows of the widget. This will display the top 10 most common errors for the period based on distinct counts. Clicking the number hyperlink will direct the user to the list page pre-filtered for applicable error.

Creating a New Batch and Submitting Files

To create a batch for submission there are two options, creating a batch file without errors or creating a batch file with errors.

To create a batch without errors:

1. Navigate to the CANS Reporting Summary List Page.
2. Filter records as desired based on last batch date or other requirements.
3. For Record Status set filter to In Progress.
4. Apply filter.
5. Review displayed records as needed.
6. Select the appropriate records. This can be done for individual records using the check boxes in the left hand column, clicking Select All or Select All on Page.
7. Once desired records have been selected use the Action drop down in the top right to select Create Batch Submission.
8. A pop up window will appear confirming the action to batch X number of records.
9. Click OK.
10. Once results have processed a green message will display above the filters confirming the action was successful.
11. The batched file is now available for retrieval via the Batch Detail Page or the SFTP.

Under certain circumstances it may be necessary to create a batch record with errors. In this situation, follow these steps:

1. Navigate to the CANS Reporting Summary List Page.
2. Filter records as desired based on last batch date or other requirements.
3. For Record Status set filter to In Progress and Error.
4. Apply filter.
5. Review displayed records as needed.

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6. Select the appropriate records. This can be done for individual records using the check boxes in the left hand column, clicking Select All or Select All on Page.
7. Once desired records have been selected use the Action drop down in the top right to select Create Batch Submission.
8. A pop up window will appear confirming the action to batch X number of records.
9. Click OK
10. Once results have processed a green message will display above the filters confirming the action was successful.
11. The batched file is now available for retrieval via the Batch Detail Page or the SFTP.

Viewing Batch Details

Once the batch has been generated there are two options for retrieving the file for submission. The first being from the customer's SFTP folder.

1. Navigate to the customer's SFTP folder.
2. Within that folder select the State Reporting folder.
3. Select the CANS folder.
4. Retrieve the file for the desired batch.

The second option is to utilize the Compliance Batch List Page.

Navigate to the Compliance Batch List Page using the search or Quicklinks as applicable.

Compliance Batch List Page (13)

Filters: CANS, All Batch Statuses, All Batch Submitted To, Apply Filter

Batch Creation Start: 10/01/2021, Batch Creation End: 11/01/2022, Batch ID: []

Batch Data Start: [], Batch Data End: []

Select: All, All on Page, None

Batch ID	Batch Type	Batch Status	Submitted To	Batch CreationDate / Time	Batch Data Start	Batch Data End	Total Record Count	Rejected	% Success
<input type="checkbox"/> 11	CANS	Sent	Imperial	10/06/2022 12:13:46	09/26/2022	10/03/2022	1	0	0.00%
<input type="checkbox"/> 12	CANS	Sent	Alameda	10/06/2022 01:30:13	09/01/2022	10/04/2022	2	0	0.00%
<input type="checkbox"/> 13	CANS	Sent	Alpine	10/06/2022 01:30:14	09/01/2022	10/04/2022	1	0	0.00%
<input type="checkbox"/> 14	CANS	Sent	Butte	10/07/2022 07:16:14	09/01/2022	10/07/2022	1	0	0.00%
<input type="checkbox"/> 20	CANS	Sent	Imperial	10/11/2022 09:37:03	09/26/2022	10/03/2022	1	0	0.00%
<input type="checkbox"/> 21	CANS	Sent	Imperial	10/11/2022 05:19:40	09/26/2022	10/03/2022	1	0	0.00%
<input type="checkbox"/> 22	CANS	Sent	Butte	10/12/2022 03:33:54	09/01/2022	10/07/2022	1	0	0.00%
<input type="checkbox"/> 24	CANS	Sent	Butte	10/14/2022 11:07:40	09/01/2022	10/07/2022	1	0	0.00%
<input type="checkbox"/> 25	CANS	Sent	Imperial	10/14/2022 11:07:41	09/01/2022	10/07/2022	1	0	0.00%
<input type="checkbox"/> 32	CANS	Sent	Glenn	10/19/2022 11:52:02	07/01/2021	10/28/2022	3	0	0.00%

1. Filter for Batch Type = CANS
2. Select other filters as appropriate.
3. Click Apply to refresh the List Page results.
4. Select the desired batch by clicking the Batch ID hyperlink, this will direct you to the Batch Detail Page.

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- From the Batch Detail Page click the hyperlink to the file in the Batch Details to download the results.

Compliance Batch Details Page

Batch Summary

Batch ID	11	Batch Type	CANS
Batch Status	Sent	Reporting To	Imperial
Batch Data Start Date	09/26/2022	Batch Data End Date	10/03/2022
Batch Created By	Admin, System	Batch Creation Date/Time	10/06/2022 12:13:46

Batch Details

Data Set Name	Total Records	Rejected Records	Accepted Records	File
CANS	1	0	0	13_1120221006_Processed...

Accepting or Rejecting a Batch

Once the batch file has been sent to the appropriate entity, batches can be marked as accepted or rejected. To mark batches as accepted:

- Navigate to the Compliance Batch List Page
- Set Batch Type Filter to CANS, set other filters as appropriate.
- Click Apply Filter
- To accept multiple batches select the check boxes on the left, click All or All on Page.
- Use the action
- Accepting a batch can also be done individually by clicking the Batch Id hyperlink that directs you to the Compliance Batch Detail Page.
- In the Batch Summary section select Accept from the Batch Status drop down.

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Compliance Batch Details Page

✖ Batch Status Changed

Batch Summary

Batch ID	11	Batch Type	CANS
Batch Status	Rejected	Reporting To	Imperial
Batch Data Start Date	09/26/2022	Batch Data End Date	10/03/2022
Batch Created By	Admin, System	Batch Creation Date/Time	10/06/2022 12:13:46

To mark batches as rejected:

1. Navigate to the Compliance Batch List Page
2. Set Batch Type Filter to CANS, set other filters as appropriate.
3. Click Apply Filter
4. To reject multiple batches select the check boxes on the left, click All or All on Page.
5. Accepting a batch can also be done individually by clicking the Batch Id hyperlink that directs you to the Compliance Batch Detail Page.
6. In the Batch Summary section select Accept from the Batch Status drop down.

Compliance Batch Details Page

✖ Batch Status Changed

Batch Summary

Batch ID	11	Batch Type	CANS
Batch Status	Accepted	Reporting To	Imperial
Batch Data Start Date	09/26/2022	Batch Data End Date	10/03/2022
Batch Created By	Admin, System	Batch Creation Date/Time	10/06/2022 12:13:46

Accepting or Rejecting an Individual Record

Once the batch file has been sent to the appropriate entity, if a portion of records were accepted these can be marked as such. To mark records as accepted:

1. Navigate to the CANS Reporting Summary List Page.
2. Filter the results to display the records needing to be accepted. This can be done a number of ways including by date, Status, or Batch ID
3. Select the records you wish to accept using the check boxes, clicking All or All on Page.
4. Use the Action drop down to select Accept Records.

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CANS Reporting Record Summary List Page (5)

From Date: 08/01/2022 To Date: 10/28/2022 Apply Filter

Record Id: Batch Id: Client Id:

All Programs: All Providers: All Record Types: Sent All Staff: All Managing Entities: All Batch types: All Errors:

Select: All, All on Page, None

Record ID	Record Type	Record Status	Errors	Record Date	Client	Program/Provider	Batch Type	Last Batch Submission Date	Last Batch ID	Respon	
<input checked="" type="checkbox"/>	15	CANS	Sent	ProviderNumber is Mis...	10/19/2022	Test, CANS(1016)	Outpatient	CANS	10/19/2022	32	Mabrey,
<input checked="" type="checkbox"/>	16	CANS	Sent	ProviderNumber is Mis...	10/19/2022	Test, CANS(1016)	Outpatient	CANS	10/19/2022	32	Mabrey,
<input checked="" type="checkbox"/>	17	CANS	Sent	ProviderNumber is Mis...	10/19/2022	Test, CANS(1016)	Outpatient	CANS	10/19/2022	32	Mabrey,
<input type="checkbox"/>	9	CANS	Sent	CIN Is Not In Format...	10/06/2022	Lastname, Client(1)		CANS	10/31/2022	36	Mabrey,
<input type="checkbox"/>	10	CANS	Sent	ProviderNumber is Mis...	10/06/2022	Bacon, Crunchy(1008)		CANS	10/31/2022	35	Mabrey,

Action: Accept Records, Cancel, Create Batch Submission, Create Batch Submission with Errors, Refresh Data, Reject Records

To mark records as rejected:

5. Navigate to the CANS Reporting Summary List Page.
6. Filter the results to display the records needing to be accepted. This can be done a number of ways including by date, Status, or Batch ID
7. Select the records you wish to reject using the check boxes, clicking All or All on Page.
8. Use the Action drop down to select Reject Records.

CANS Reporting Record Summary List Page (5)

From Date: 08/01/2022 To Date: 10/28/2022 Apply Filter

Record Id: Batch Id: Client Id:

All Programs: All Providers: All Record Types: Sent All Staff: All Managing Entities: All Batch types: All Errors:

Select: All, All on Page, None

Record ID	Record Type	Record Status	Errors	Record Date	Client	Program/Provider	Batch Type	Last Batch Submission Date	Last Batch ID	Respon	
<input checked="" type="checkbox"/>	15	CANS	Sent	ProviderNumber is Mis...	10/19/2022	Test, CANS(1016)	Outpatient	CANS	10/19/2022	32	Mabrey,
<input checked="" type="checkbox"/>	16	CANS	Sent	ProviderNumber is Mis...	10/19/2022	Test, CANS(1016)	Outpatient	CANS	10/19/2022	32	Mabrey,
<input checked="" type="checkbox"/>	17	CANS	Sent	ProviderNumber is Mis...	10/19/2022	Test, CANS(1016)	Outpatient	CANS	10/19/2022	32	Mabrey,
<input type="checkbox"/>	9	CANS	Sent	CIN Is Not In Format...	10/06/2022	Lastname, Client(1)		CANS	10/31/2022	36	Mabrey,
<input type="checkbox"/>	10	CANS	Sent	ProviderNumber is Mis...	10/06/2022	Bacon, Crunchy(1008)		CANS	10/31/2022	35	Mabrey,

Action: Accept Records, Cancel, Create Batch Submission, Create Batch Submission with Errors, Refresh Data, Reject Records

Workflows for Collecting Data

The clients that are eligible for reporting have a completed CA CANS Document in the specified reporting period. Please see the CANS File Mapping for more detailed specifics than the summary provided here.

SmartCare Screen	Description of Data	File Reported To
CA CANS Document	CNTY_CD ASSESS_DT	CANS

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SmartCare Screen	Description of Data	File Reported To
	CAREGIVER CANS_CB_Q1 CANS_CB_Q2 CANS_CB_Q3 CANS_CB_Q4 CANS_CB_Q5 CANS_CB_Q6 CANS_CB_Q7 CANS_CB_Q8 CANS_CB_Q9 CANS_LD_Q10 CANS_LD_Q11 CANS_LD_Q12 CANS_LD_Q13 CANS_LD_Q14 CANS_LD_Q15 CANS_LD_Q16 CANS_LD_Q17 CANS_LD_Q18 CANS_LD_Q19 CANS_LD_Q20 CANS_RB_Q21 CANS_RB_Q22 CANS_RB_Q23 CANS_RB_Q24 CANS_RB_Q25 CANS_RB_Q26 CANS_RB_Q27 CANS_RB_Q28 CANS_CF_Q29 CANS_CF_Q30 CANS_CF_Q31 CANS_SD_Q32 CANS_SD_Q33 CANS_SD_Q34 CANS_SD_Q35 CANS_SD_Q36 CANS_SD_Q37 CANS_SD_Q38 CANS_SD_Q39 CANS_SD_Q40	

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SmartCare Screen	Description of Data	File Reported To
	CANS_CR_Q41 CANS_CR_Q42 CANS_CR_Q43 CANS_CR_Q44 CANS_CR_Q45 CANS_CR_Q46 CANS_CR_Q47 CANS_CR_Q48 CANS_CR_Q49 CANS_CR_Q50	
Client Information	CCN CLIENT_NAME CLIENT_DOB	CANS
Client Coverage Plans	CIN	CANS
Program	PROVIDER_NUM	CANS
System Generated	TRANS_CD ASSESS_TOOL_CD	CANS

File Logic

The CA CANS submission includes one record type, CANS.

For a record to be included as a CANS record the following must occur:

1. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.
2. The client must have a completed CA CANS Document

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System Setup

Global Codes

The following global code categories are loaded into the system but may require additional configuration depending on customer need.

Global Code Category	Field in CANS Reports	What to Set Up
DACSMANAGINGENTITY	County CNTY_CD	Customers should deactivate counties that they do not report to.
XCAGrade	Grade, not included in CANS submission	Not Applicable

System Configuration Keys

System Configuration keys are set up in the Configuration Keys banner in SmartCare's Administration tab. The Key name can be filtered on. Then opening to the detail page allows the user to modify the Value field as indicated below. Then Saving the screen will update the information.

Configuration Key Name	Description
XSetCountyCodeForCaliforniaStateReporting	<p>This configuration key may be set in order to default and hide the county of submission field on the CANS Document. If the customer is a county MHP or only reports to one California County this configuration key can be used to set the county for which all data will be reported for/to. If not set, the County field is available and the user will be required to select the county from the available Global Code.</p> <p>To set the configuration key find the FIPS County Code in the following table and enter it into the Value field.</p>

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FIPS	County	FIPS	County	FIPS	County	FIPS	County
6001	Alameda	6031	Kings	6061	Placer	6091	Sierra
6003	Alpine	6033	Lake	6063	Plumas	6093	Siskiyou
6005	Amador	6035	Lassen	6065	Riverside	6095	Solano
6007	Butte	6037	Los Angeles	6067	Sacramento	6097	Sonoma
6009	Calaveras	6039	Madera	6069	San Benito	6099	Stanislaus
6011	Colusa	6041	Marin	6071	San Bernardino	6101	Sutter
6013	Contra Costa	6043	Mariposa	6073	San Diego	6103	Tehama
6015	Del Norte	6045	Mendocino	6075	San Francisco	6105	Trinity
6017	El Dorado	6047	Merced	6077	San Joaquin	6107	Tulare
6019	Fresno	6049	Modoc	6079	San Luis Obispo	6109	Tuolumne
6021	Glenn	6051	Mono	6081	San Mateo	6111	Ventura
6023	Humboldt	6053	Monterey	6083	Santa Barbara	6113	Yolo
6025	Imperial	6055	Napa	6085	Santa Clara	6115	Yuba
6027	Inyo	6057	Nevada	6087	Santa Cruz		
6029	Kern	6059	Orange	6089	Shasta		

Recodes

The following Recode is required to pull the Client Index Number (CIN) into the CANS file.

Recode Category	Purpose	Character Code ID
XMediCal	This Category is used to identify which Coverage Plans are considered to be	From the Plans Administration screen, use the Plan Id to map each plan

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	California Medi-Cal Plans	to the recode category
--	---------------------------	------------------------

Roles and Permissions

Depending on the logged in user's responsibilities they will need access to the following permissions. Navigate to Administration > Role Definition and permission the items below by role as needed.

1. To view CANS Documents
 - a. Select Permission Type > Document Codes (View)
 - b. Grant CANS Standalone Collection Document
 - c. Select Permission Type > Screens
 - d. Grant CANS Admission and CANS Update/Discharge
2. To edit CANS Documents
 - a. Select Permission Type > Document Codes (Edit)
 - b. Grant CANS Standalone Collection Document
 - c. Select Permission Type > Screens
 - d. Grant CANS Admission and CANS Update/Discharge
3. To view the CANS Reporting Summary Widget
 - a. Select Permission Type > Widgets
 - b. Grant CANS Reporting Summary
4. To view CANS Records
 - a. Select Permission Type > Screens
 - b. Grant CANS Report Summary and CANS Report Summary Details
5. To view CANS Batch Records
 - a. Select Permission Type > Screens
 - b. Grant Compliance Batch List Page and Compliance Batch Detail Page

Version Control

Revision Date	Description	Updated By
03/02/2023	Update Recode instructions	EMabray

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