User Guide: CSI Assessment Standalone

Version 1.0 (California)

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Table of Contents

v.6.14.2021

User Guide: CSI

General Information

The CSI Standalone Assessment document is utilized in SmartCare to complete the information gathering for clients for county level state reporting. The data from the completed document is now eligible for batching and submission.

For a new client who does not have a SmartCare episode, you must first do the following:

- Complete Registration Document with enrollment into CSI Program.

If Client is already receiving services with another program, you must first:

- Enroll client into the CSI program you are completing this form for.

Navigating to and Creating the CSI Standalone Assessment Document

From the Client Search or Quick link

You can create the document from the client tab. In order to do this, you must first search for the client or select the client from your primary list in client search drop down.

Navigate to the 'Person Icon'. Click the dropdown and select 'Client Search' or choose the client name in the drop down. If using search functionality, see below:
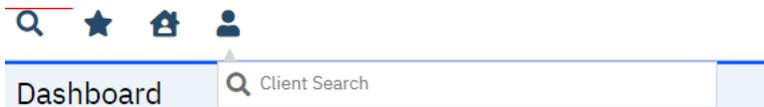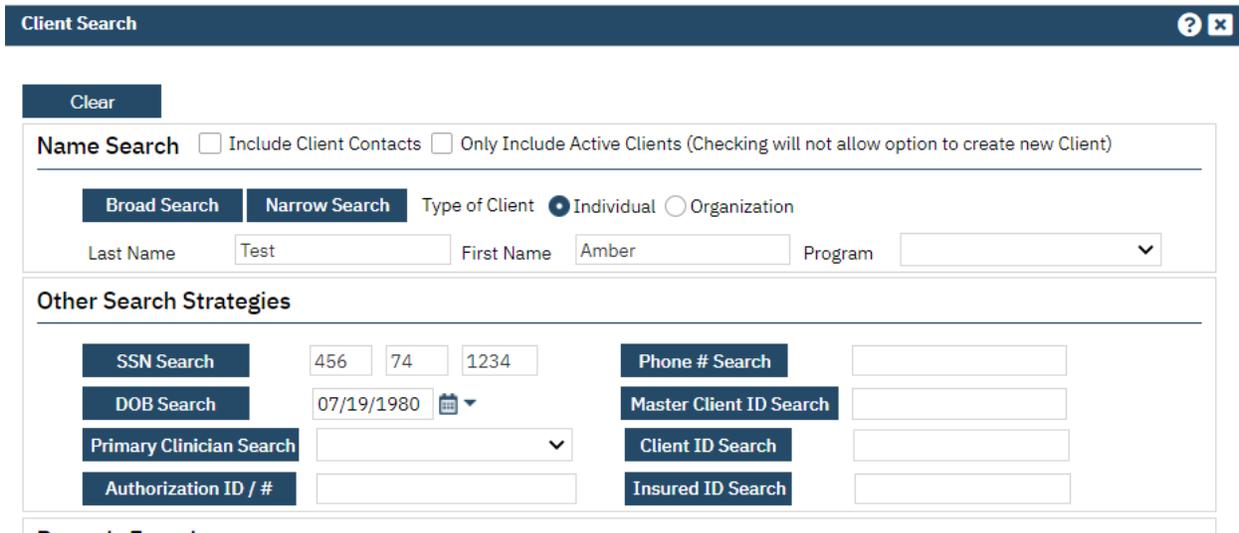

You will be presented with the 'Client Search' screen. On this screen, you will be able to search for a client by a number of parameters.

- Broad Search - Allows for the search of a client by name, partial name, sounds like.
- Narrow Search - Returns for search of exact name match
- SSN Search - Social Security Number search
- DOB Search - Date of Birth search
- Primary Clinician Search - Search by assigned primary clinician
- Authorization ID/# - Search by authorization ID or number recorded in SmartCare
- Phone # Search - Client phone number search

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- Master Client ID Search - Used in Care Management; Search by client's Master Record ID. Your organization will not use this button.
- Client ID Search
- Insured ID Search-search by insurance ID.

Upon opening client search you will note that the only button to the bottom right that is actionable is 'Cancel.' Your client should already exist at this point of your workflow, so you can enter information in each of the fields you would like to use for a search parameter and click the corresponding search button for each, as shown outlined in below.

If the client for whom you are searching already has a record in SmartCare, you will have the ability to select the existing record.

- Select - This will open the selected client's record

Click the 'Select' button to open the existing client. Once the client has been opened, you will note that there is a new tab open with the client's name and ID displayed.

This is the client tab. When a client is selected, the client's name will appear on the toolbar. This is where you will be able to create the CSI document.

By using the magnifying glass to search for the CSI Standalone Collection document you can search for the assessment or locate the assessment using a quick link.

CSI Assessment Document

General

Under the CSI Assessment Document label, note the information pertaining to the status of the document.
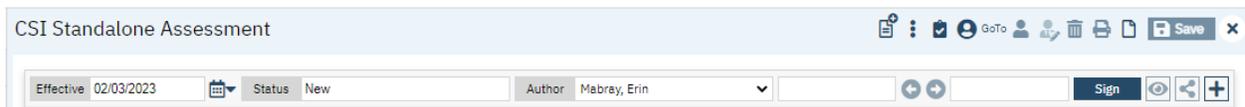
We will explore these fields more thoroughly when completing the CSI Assessment document. However, note at this time that an effective date will be required to complete the document and it is defaulting to today's date. This default is configurable and can be changed, depending on your organization.

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CSI Assessment

Initial

CSI Assessment Data is required for all new clients and clients not seen in the past 12 months. This data is used to capture the timeliness of service provision from time of request for service to assessment and subsequent receipt of services. Dates must correspond to the appropriate date of contact, offered appointment or provided service as they relate to the client's CSI reportable services.

CSI Assessment

Request Date		Referral Source	⌄
First Offered Assessment Appointment Date		Second Offered Assessment Appointment Date	📅 ▾
Third Offered Assessment Appointment Date	📅 ▾	Accepted Assessment Appointment Date	📅 ▾
Assessment Start Date	📅 ▾	Assessment End Date	📅 ▾
First Offered Treatment Appointment Date	📅 ▾	Second Offered Treatment Appointment Date	📅 ▾
Third Offered Treatment Appointment Date	📅 ▾	Accepted Treatment Appointment Date	📅 ▾
Treatment Start Date	📅 ▾	Closure Reason	⌄
Closed Out Date	📅 ▾	Referred To	⌄
Other			

- Request Date
  - This will initialize the Inquiry Start Date field from the most recent inquiry.
    - You can edit it if that date is not accurate.

- Referral Source
  - Select the source of the clients referral to the organization from the following values.
    - Crisis Services
    - Emergency Room
    - Faith-based Organization
    - Family Member
    - Federally Qualified Health Center
    - Fee-For-Service Provider
    - Friend / Neighbor

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- Homeless Services

- Jail / Prison

- Juvenile Hall / Camp / Ranch / Division of

- Juvenile Justice

- Medi-Cal Managed Care Plan

- Mental Health Facility / Community Agency

- Mobile Evaluation

- Other County / Community Agency

- Other referred

- Probation / Parole

- School

- Self

- Significant Other

- Social Services Agency

- State Hospital

- Street Outreach

- Substance Abuse Treatment Facility / Agency

- First Offered Assessment Appointment Date
    - This will initialize from the first appointment offered from Appointment Search where user selected client declined and it is greater than or equal to the request date.
- Second Offered Assessment Appointment Date
    - This will initialize the second appointment offered from Appointment Search where user selected client declined and it is greater than or equal to First Offered Assessment Appointment Date.
- Third Offered Assessment Appointment Date

- o This will initialize the third appointment offered from Appointment Search where user selected client declined and it is greater than or equal to Second Offered Assessment Appointment Date.
- ● Accepted Assessment Appointment Date
  - o This will initialize from the scheduled service where procedure code is defined as Reportable CSI Assessment (see set up considerations) AND date is greater than or equal to Request Date AND status = Scheduled, Show, or Complete.
- ● Assessment Start Date
  - o This will initialize from the scheduled service where procedure code is defined as Reportable CSI Assessment (see set up considerations) AND date is greater than or equal to Request Date AND status = Complete.
- ● Assessment End Date
  - o This will initialize as the same date of Accepted Assessment Appointment Date, once the status = Complete.
- ● First Offered Treatment Appointment Date
  - o This will initialize from the first appointment offered from Appointment Search where user selected client declined and it is greater than or equal to the Assessment Start date.
- ● Second Offered Treatment Appointment Date
  - o This will initialize the second appointment offered from Appointment Search where user selected client declined and it is greater than or equal to First Offered Treatment Appointment Date.
- ● Third Offered Treatment Appointment Date
  - o This will initialize the third appointment offered from Appointment Search where user selected client declined and it is greater than or equal to Second Offered Treatment Appointment Date.
- ● Accepted Treatment Appointment Date
  - o This will initialize from the scheduled service where procedure code is defined as Reportable CSI Service (see set up considerations) AND date is greater than or equal to Request Date AND status = Scheduled, Show, or Complete.
- ● Treatment Start Date
  - o This will initialize from the scheduled service where procedure code is defined as Reportable CSI Service (see set up considerations) AND date is greater than or equal to Request Date AND status = Complete.
- ● Closure Reason
  - o If this should be closed due to admin reasons, user can select one of the following values:
   - ▪ Beneficiary did not accept any offered assessment dates

- ▪ Beneficiary accepted offered assessment date but did not attend initial assessment appointment.

- ▪ Beneficiary attended initial assessment appointment but did not complete assessment process.

- ▪ Beneficiary completed assessment process but declined offered treatment dates.

- ▪ Beneficiary accepted offered treatment date but did not attend initial treatment appointment.

- ▪ Beneficiary did not meet medical necessity criteria.

- ▪ Out of county/presumptive transfer.

- ▪ Unable to contact (e.g., deceased or client unresponsive).

- ▪ Other
  - o **If user enters a Closed Out Date, this field is required**.
- ● Closed out Date
  - o **This field is required when user enters a Closure Reason.**
- ● Referred To
  - o User can select one of the following values:

    - ▪ Managed Care Plan

    - ▪ Fee-For-Service Provider

    - ▪ Other(Specify)

    - ▪ No Referral

- ● Other
  - o This field only shows and is required when user selects 'Other (specify)' to the previous question.

Completing the CSI Assessment Document
Now, you have two options: sign or save. If there is a compelling reason not to complete and sign the document, it can be saved and returned to at a later time by clicking the save button in the toolbar.

However, keep in mind that if the CSI Assessment document is not signed information will not initialize into the client record, where applicable. To sign the document, it is not required that you save it first. Signing will both save and sign the document. First, ensure that the document has an effective date, and then click the blue 'Sign' button.
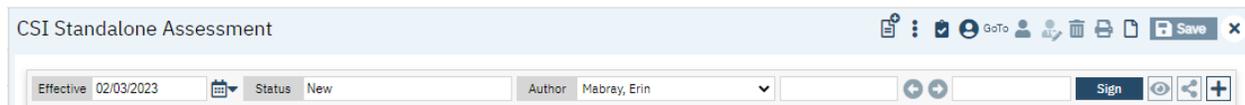

When you click the sign button, if you have fields that are required that you did not enter data into, you will receive a validation message like the one below.
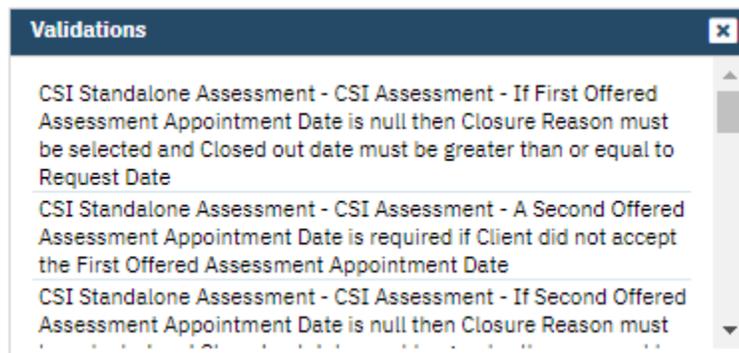
The validation message will tell you exactly where you need to go to complete the requirement. The first part of the message (e.g. CSI Standalone) will tell you on what tab you will find the requirement on. The second part of the message (e.g.CSI Assessment) will tell you which section to find the requirement in. The third part of the message (e.g If First Offered Assessment…) will tell you what the requirement itself is.

Once all requirements have been completed, click the sign button again (if validations occurred). You will then be presented with the signature screen. By typing in your password and clicking 'Sign' the document will be signed and applicable information initialized to the client record.
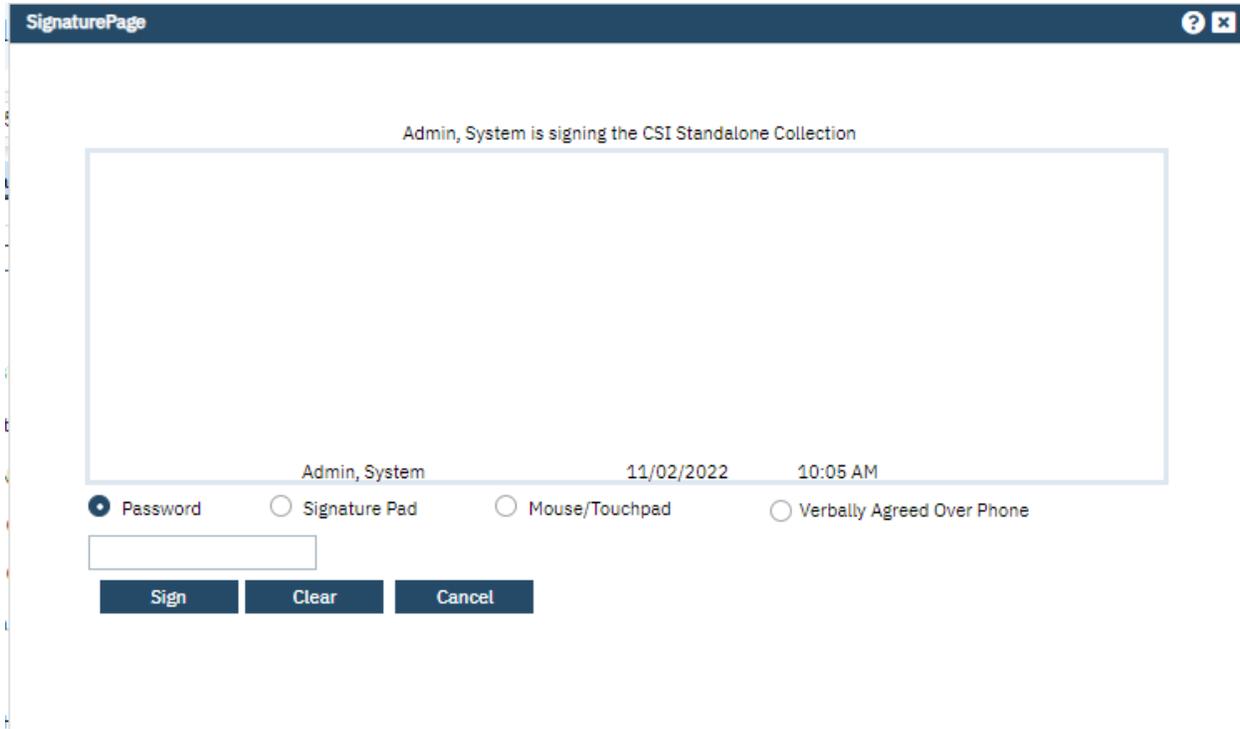
Once the document is signed, you should see a PDF of the document on the screen and status should change to complete.

Set-Up Considerations (Administrative Purpose)

This section outlines all items needed for setting up this document for use with your organization, including any necessary configurations/details around how to set up other areas of your system that work directly with this document.

Procedure Codes

Procedure Code Category 1

All assessment services that are reportable to CSI must be marked as Reportable CSI Assessment in this field to count in the CSI Assessment initialization logic.

- Go to Procedure/Rates
- Open each procedure code considered to be a Reportable CSI Assessment code and do the following for each:
  - Update Procedure Code Category 1 field to indicate 'Reportable CSI Assessment'

All Treatment Services that are reportable to CSI must be marked as Reportable CSI Service in this field to county as a Treatment Service. Please follow instructions to update all procedure codes where this field should be designated.

Configuration Keys

Go to Configuration Keys screen and find the configuration key name you are looking to modify.

County Mapping

Field Name	Configuration Key Category Name
County of Submission	XSetCountyCodeForCaliforniaStateReporting

If your organization only provides services to clients within ONE county, then you should enter the County Code as defined by your state here. If nothing is entered, then on the form, user will be required to select the County every time. If something is entered here, then user will not see the field and it will prepopulate in the table for this document to be sent for reporting to the accurate county.

If your organization provides services to clients in more than one county and you report to each of those counties, then you should indicate 'None' in this key or leave it blank and users will be required to select the county each time they do the document.

If there are counties you do not provide services to, you can go to the DACSManagingEntity Global Code category in the Global Codes screen and deactivate any counties you do not want staff to see in the drop down. You should only do this for counties that NONE of your programs are serving. You should keep all counties that at least one program serves as active.

CSI Assessment Tab Show/Hide

Field Name	Configuration Key Category Name
CSI Assessment Tab (show or hide)	XShowCSIAssessmentTabOnCSIStandaloneDoc

If user selects 'N' as the value for this configuration key, it will hide this tab and force user to complete the standalone CSI Assessment Document that only contains these fields. Otherwise, when 'Y' is entered, user can capture whatever fields are available at time of signing this document and then complete a standalone CSI Assessment document to capture remaining fields required for reporting, at a later date.

Setting Up CSI Assessment Instructional Text

Field Name	Configuration Key Category Name
CSI Assessment Instructional Text	XSetCSIAssessmentInstructionalText

Administrators can define instructional text that makes the most sense for their organization's workflows by going to this Configuration Key and updating the Value field to the text they want to see appear here. It will be Read Only on the document for the user.

v.6.14.2021