



# CSI Reporting User Guide

Standalone CSI Reporting Workflow

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## Table of Contents

<b>Overview</b>	<b>3</b>
<b>Reporting Process</b>	<b>3</b>
Reporting User Interface	3
Monitoring Reporting Prior to Submission	5
Reporting Summary Widget	6
Creating a New Batch and Submitting Files	8
Viewing Batch Details	9
Accepting or Rejecting a Batch	10
Accepting or Rejecting an Individual Record	11
<b>Workflows for Collecting Data</b>	<b>12</b>
<b>File Logic</b>	<b>15</b>
Record Types	15
Client Record	15
Periodic Record	15
Assessment Record	16
Service Record	16
Key Change Record	16
<b>System Setup</b>	<b>17</b>
Global Codes	17
External Mapping	17
Programs	17
Procedure Code	18
System Configuration Keys	18
Roles and Permissions	19

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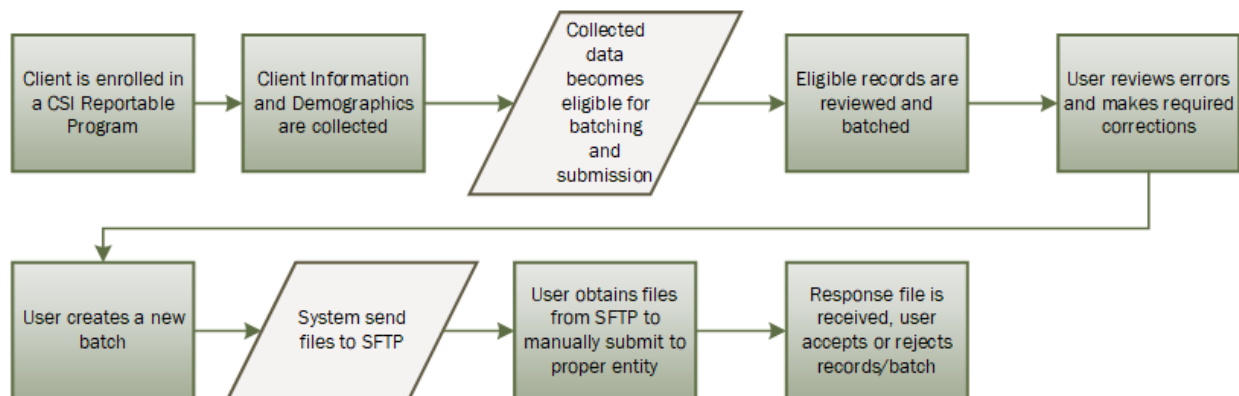




## Overview

The CSI data collection process begins at time of program enrollment. A user will create a Program Assignment for a CSI reportable program with a Program Status of enrolled. This may be done using the Program Details Screen or the Program tab in the SC Core Registration. Once the Program Assignment is created a job will run at scheduled intervals that creates a TEDS episode for the reporting episode. Customers may create a Tracking Protocol based on their workflow needs that assigns a flag to the responsible user to complete the CSI Standalone Collection Document. This document collects the data required for the CSI Client and Periodic Records. Similarly, customers may also create a Tracking Protocols based on their needs for the CSI Annual Update requirements to assign a flag to the user responsible for collecting corresponding data. CSI Service Records report data collected through Service's for CSI reportable programs. Once these documents have been signed as complete the data sets become eligible candidate records for batching and submission.

## 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 CSI 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 CSI Reporting Summary List Page.

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

CSI Reporting Summary (7)

From: 10/01/2022 To: 11/03/2022 Record ID: Managing Entity: All Entities Batch ID:

Program: All Programs Batch Type: CSI Provider: All Providers

Record Type: All Record Types Record Status: All Record Statuses Client ID:

Responsible Staff: All Staff Time to Assessment: All Time to Assessment Time to First Service: All Time to First Service

Errors: All Errors **Apply Filter**

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	Responsible Staff	Entry Date	Admission Date	Discharge Date
1	Client	Error	PrimaryLanguage is Mi...	11/04/2022	CSI, Erin(2023)	CSI	CSI			Mabray, Erin	11/03/2022		
2	Service	Error	CountyCityMentaHeal...	11/07/2022	CSI, Erin(2023)	CSI	CSI			Mabray, Erin	11/03/2022		
2	Service	Error	CountyCityMentaHeal...	11/07/2022	CSI, Erin(2023)	CSI	CSI			Mabray, Erin	11/03/2022		
1	Periodic	Error	CountyCityMentaHeal...	09/26/2022	Lastname, Clie...	CSI	CSI			Admin, System	07/21/2022	07/21/2022	
2	Periodic	Error	EmploymentStatus is ...	09/29/2022	Test, TEDS(1012)	CSI	CSI			Admin, System	09/27/2022	09/01/2022	
3	Periodic	In Progress		11/04/2022	CSI, Erin(2023)	CSI	CSI			Mabray, Erin	11/03/2022		
1	Assessment	Error	ReferralSource is Miss...	11/04/2022	CSI, Erin(2023)	CSI	CSI			Mabray, Erin	11/03/2022		

The CSI Reporting Summary List Page displays all eligible CSI 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 CSI 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 CSI record
- Managing Entity - the county that the CSI records are to be reported to may be selected.
- Batch ID - if a record has previously been batched, this field will filter on a specific Batch ID.
- Program - indicates which program the CSI record is associated with

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- Batch Type - this will default to CSI Batch Type
- Provider - if the customer is a County entity and is utilizing MCO, this will indicate which Contracted Provider the CSI record is associated with
- Record Type - this filter allows for differentiating between the different CSI record types; Admission, Annual Update and Discharge.
- Record Status - indicates the current status of the record.
- Client ID - this is the unique SC identifier of the client record associated with the CSI record.
- Responsible Staff - the staff who completed the data collection for the record will display
- Time to Assessment - based on a calculation from date of request to date of assessment appointment, this allows filtering based on time frames of 0-7, 8-14, 15-30, and 30+ days.
- Time to First Service - based on a calculation from date of request to date of service appointment, this allows filtering based on time frames of 0-7, 8-14, 15-30, and 30+ days.
- Errors - this multi select filter will display the applicable errors.

CSI Reporting Summary (7)

From 10/01/2021 To 11/03/2022 Record ID Managing Entity All Entities Batch ID

Program All Programs Batch Type CSI Provider All Providers

Record Type All Record Types Record Status All Record Statuses Client ID

Responsible Staff All Staff Time to Assessment All Time to Assessment Time to First Service All Time to First Service

Errors All Errors **Apply Filter**

## 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 CSI 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 CSI 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 CSI Reporting Summary List page and use the check box to select the record(s) that have been corrected then select

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Refresh Data from the Action drop down to pull the corrected data into that record to later be batched for submission.

Record ID	Record Type	Record Status	Errors	Record Date	Client	Program / Provider	Batch Type	Last Batch Submission Date	Last Batch ID	Responsible Staff	Entry Date	Admission Date	Discharge Date
<input type="checkbox"/>	1	Client	Sent	PrimaryLanguage is Mi...	11/04/2022	CSI, Erin(2023)	CSI	11/07/2022	51	Mabrey, Erin	11/03/2022		
<input checked="" type="checkbox"/>	1	Service	Error	CountyCityMentalHeal...	11/07/2022	CSI, Erin(2023)	CSI			Mabrey, Erin	11/03/2022		
<input checked="" type="checkbox"/>	2	Service	Error	CountyCityMentalHeal...	11/07/2022	CSI, Erin(2023)	CSI			Mabrey, Erin	11/03/2022		
<input checked="" type="checkbox"/>	1	Periodic	Error	CountyCityMentalHeal...	09/26/2022	Lastname, Clie...	CSI			Admin, System	07/21/2022	07/21/2022	
<input type="checkbox"/>	2	Periodic	Error	EmploymentStatus is ...	09/29/2022	Test, TEDS(1012)	CSI			Admin, System	09/27/2022	09/01/2022	
<input type="checkbox"/>	2	Periodic	In Progress		11/04/2022	CSI, Erin(2023)	CSI			Mabrey, Erin	11/03/2022		
<input type="checkbox"/>	1	Assessment	Error	ReferralSource is Misl...	11/04/2022	CSI, Erin(2023)	CSI			Mabrey, Erin	11/03/2022		

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 CSI 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 CSI Reporting Summary Widget
3. Enter a number of past days for which to filter the records.
4. Select All or a specific Program using the drop down.
5. Click the refresh icon in the right hand corner of the widget if filters were modified.
6. 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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CSI Reporting Summary 	
Records in Past	<input type="text" value="0"/> Days
	All Programs 
Total Records	<a href="#">7</a>
Total Unsubmitted Record Count	<a href="#">6</a>
Total Records with Errors	<a href="#">5</a>
Total Records Submitted	<a href="#">1</a>
Total Record Accepted Count	<a href="#">0</a>
Total Record Rejected Count	<a href="#">0</a>
% of Success of Submitted Records	0%
% of Rejected Count	0%
Total # of Batches Submitted	<a href="#">1</a>

The CSI 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.
- % 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.

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- 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 CSI 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.

The screenshot shows the 'CSI Reporting Summary (7)' interface. At the top, there is a green notification bar that says 'Action Processed Successfully'. Below this, there is a filter panel with the following fields: 'From' (10/01/2021), 'To' (11/03/2022), 'Record ID' (empty), 'Managing Entity' (All Entities), 'Batch ID' (empty), 'Program' (All Programs), 'Batch Type' (CSI), 'Provider' (All Providers), 'Record Type' (All Record Types), 'Record Status' (All selected), 'Client ID' (empty), 'Responsible Staff' (All Staff), 'Time to Assessment' (All Time to Assessment), 'Time to First Service' (All Time to First Service), and 'Errors' (All Errors). An 'Apply Filter' button is located at the bottom right of the filter panel.

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

1. Navigate to the CSI Reporting Summary List Page.

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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.
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 CSI folder.
4. Retrieve the file for the desired batch.

The screenshot shows the 'Compliance Batch List Page (1)' with various filters and a table of batch records. The filters include 'All Batch Statuses' and 'All Batch Submitted To'. The table has columns for Batch ID, Batch Type, Batch Status, Submitted To, Batch CreationDate / Time, Batch Data Start, Batch Data End, Total Record Count, Rejected, and % Success.

Batch ID	Batch Type	Batch Status	Submitted To	Batch CreationDate / Time	Batch Data Start	Batch Data End	Total Record Count	Rejected	% Success
1	CSI	Sent	Alameda	11/07/2022 01:59:06	11/02/2021	11/03/2022	1	0	0.00%

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

1. Navigate to the Compliance Batch List Page using the search or Quicklinks as applicable.
2. Filter for Batch Type = CSI
3. Select other filters as appropriate.
4. Click Apply to refresh the List Page results.
5. Select the desired batch by clicking the Batch ID hyperlink, this will direct you to the Batch Detail Page.

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

## 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:

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

Compliance Batch Details Page

Batch Summary			
Batch ID	51	Batch Type	CSI
Batch Status	Accepted	Reporting To	Alameda
Batch Data Start Date	11/02/2021	Batch Data End Date	11/03/2022
Batch Created By	Mabray, Erin	Batch Creation Date/Time	11/07/2022 01:59:06

To mark batches as rejected:

1. Navigate to the Compliance Batch List Page
2. Set Batch Type Filter to CSI, 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.

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## Compliance Batch Details Page

Batch Summary			
Batch ID	51	Batch Type	CSI
Batch Status	Rejected	Reporting To	Alameda
Batch Data Start Date	11/02/2021	Batch Data End Date	11/03/2022
Batch Created By	Mabrey, Erin	Batch Creation Date/Time	11/07/2022 01:59:06

## 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 CSI 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 or Page.
4. Use the Action drop down to select Accept Records.

The screenshot shows the 'CSI Reporting Summary (7)' interface. It includes a filter section with fields for 'From' (10/01/2021), 'To' (11/03/2022), 'Record ID', 'Managing Entity' (All Entities), 'Batch ID', 'Program' (All Programs), 'Batch Type' (CSI), 'Provider' (All Providers), 'Record Type' (All Record Types), 'Record Status' (All selected), 'Client ID', 'Responsible Staff' (All Staff), 'Time to Assessment', 'Time to First Service', and 'Errors' (All Errors). An 'Apply Filter' button is present. Below the filters is a table with columns: Record ID, Record Type, Record Status, Errors, Record Date, Client, Program / Provider, Batch Type, Last Batch Submission Date, Last Batch ID, Responsible Staff, Entry Date, Admission Date, and Discharge Date. The table contains 8 rows of data, with the first row selected (checked).

Record ID	Record Type	Record Status	Errors	Record Date	Client	Program / Provider	Batch Type	Last Batch Submission Date	Last Batch ID	Responsible Staff	Entry Date	Admission Date	Discharge Date
1	Client	Sent	PrimaryLanguage is ML...	11/04/2022	CSI, Erin(1023)		CSI	11/07/2022	51	Mabrey, Erin	11/03/2022		
1	Service	Error	CountyCityMentalHeal...	11/07/2022	CSI, Erin(1023)		CSI			Mabrey, Erin	11/03/2022		
2	Service	Error	CountyCityMentalHeal...	11/07/2022	CSI, Erin(1023)		CSI			Mabrey, Erin	11/03/2022		
1	Periodic	Error	CountyCityMentalHeal...	09/26/2022	Lastname, Clien...		CSI			Admin, System	07/21/2022	07/21/2022	
2	Periodic	Error	EmploymentStatus is ...	09/29/2022	Text, TEDS(1012)		CSI			Admin, System	09/27/2022	09/01/2022	
2	Periodic	In Progress		11/04/2022	CSI, Erin(1023)		CSI			Mabrey, Erin	11/03/2022		
1	Assessment	Error	ReferralSource is Miss...	11/04/2022	CSI, Erin(1023)		CSI			Mabrey, Erin	11/03/2022		

To mark records as rejected:

5. Navigate to the CSI 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 or Page.
8. Use the Action drop down to select Reject Records.

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CSI Reporting Summary (7)

From: 10/01/2021 To: 11/03/2022 Record ID: Managing Entity: All Entities Batch ID:

Program: All Programs Batch Type: CSI Provider: All Providers

Record Type: All Record Types Record Status: All selected Client ID:

Responsible Staff: All Staff Time to Assessment: All Time to Assessment Time to First Service: All Time to First Service

Errors: All Errors **Apply Filter**

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

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	Responsible Staff	Entry Date	Admission Date	Discharge Date
<input checked="" type="checkbox"/>	1 Client	Sent	PrimaryLanguage is Mi...	11/04/2022	CSI, Erin(2023)		CSI	11/07/2022	51	Mabrey, Erin	11/03/2022		
<input type="checkbox"/>	1 Service	Error	CountyCityMentalHeal...	11/07/2022	CSI, Erin(2023)		CSI			Mabrey, Erin	11/03/2022		
<input type="checkbox"/>	2 Service	Error	CountyCityMentalHeal...	11/07/2022	CSI, Erin(2023)		CSI			Mabrey, Erin	11/03/2022		
<input type="checkbox"/>	1 Periodic	Error	CountyCityMentalHeal...	09/26/2022	Lastname, Clie...		CSI			Admin, System	07/21/2022	07/21/2022	
<input type="checkbox"/>	2 Periodic	Error	EmploymentStatus is ...	09/29/2022	Test, TEDS(1012)		CSI			Admin, System	09/27/2022	09/01/2022	
<input type="checkbox"/>	2 Periodic	In Progress		11/04/2022	CSI, Erin(2023)		CSI			Mabrey, Erin	11/03/2022		
<input type="checkbox"/>	1 Assessment	Error	ReferralSource is Missi...	11/04/2022	CSI, Erin(2023)		CSI			Mabrey, Erin	11/03/2022		

## Workflows for Collecting Data

The clients that are eligible for reporting have been enrolled in or discharged from a CSI reportable program and have the proper documentation completed which has collected the CSI required data. CSI has age fields that are dependent on age as well as differing requirements for Submissions, Re-Submission and Deletions. Please see the CSI File Mapping for more detailed specifications than the summary provided here.

SmartCare Screen	Description of Data	File Reported To
CSI Collection Document	C-01.0 BIRTH NAME C-02.0 MOTHER'S FIRST NAME C-04.0 PLACE OF BIRTH C-05.0 GENDER C-07.0 PRIMARY LANGUAGE C-08.0 PREFERRED LANGUAGE C-09.0 ETHNICITY C-10.0 RACE S-26.0 TRAUMA S-12.0 SPECIAL POPULATION S-19.0 PATIENT STATUS CODE S-20.0 LEGAL CLASS - ADMISSION S-21.0 LEGAL CLASS - DISCHARGE S-22.0 ADMISSION NECESSITY CODE S-34.0 GENERAL MEDICAL CONDITION SUMMARY CODE	Client Service Periodic

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SmartCare Screen	Description of Data	File Reported To
	S-37.0 SUBSTANCE ABUSE / DEPENDENCE S-38.0 SUBSTANCE ABUSE / DEPENDENCE DIAGNOSIS S-39.0 DISTRICT OF RESIDENCE P-01.0 DATE COMPLETED P-02.0 EDUCATION P-03.0 EMPLOYMENT STATUS P-08.0 CONSERVATORSHIP / COURT STATUS P-09.0 LIVING ARRANGEMENT P-10.0 CAREGIVER	
Client Information	H-02.0 COUNTY CLIENT NUMBER (CCN) C-03.0 DATE OF BIRTH S-02.0 CURRENT LEGAL NAME / BENEFICIARY NAME S-03.0 SOCIAL SECURITY NUMBER K-01.0 FIRST SOURCE COUNTY CLIENT NUMBER K-02.0 ADDITIONAL SOURCE COUNTY CLIENT NUMBER	Control/Headers Client Service Key Change
CSI Assessment	A-02.0 Date of First Contact to Request Services A-03.0 Referral source A-04.0 Assessment Appointment First Offer Date A-05.0 Assessment Appointment Second Offer Date A-06.0 Assessment Appointment Third Offer Date A-07.0 Assessment Appointment Accepted Date A-08.0 Assessment Start Date A-09.0 Assessment End Date A-10.0 Treatment Appointment First Offer Date A-11.0 Treatment Appointment Second Offer Date A-12.0 Treatment Appointment Third Offer Date A-12.0 Treatment Appointment Accepted Date A-14.0 Treatment Start Date A-15.0 Closure Reason A-16.0 Closed Out Date A-17.0 Referred To	Assessment
Program Details	S-05.0 MODE OF SERVICE S-13.0 PROVIDER NUMBER	Service
Program	S-15.0 ADMISSION DATE	Service

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SmartCare Screen	Description of Data	File Reported To
Assignment	S-18.0 DISCHARGE DATE	
Service Note Details	S-25.0 EVIDENCE-BASED PRACTICES / SERVICE STRATEGIES S-01.0 RECORD REFERENCE NUMBER (RRN) S-07.0 UNITS OF SERVICE S-08.0 UNITS OF TIME S-09.0 PRINCIPAL MENTAL HEALTH DIAGNOSIS S-10.0 SECONDARY MENTAL HEALTH DIAGNOSIS S-11.0 ADDITIONAL MENTAL OR PHYSICAL HEALTH DIAGNOSIS S-11.0 ADDITIONAL MENTAL OR PHYSICAL HEALTH DIAGNOSIS S-11.0 ADDITIONAL MENTAL OR PHYSICAL HEALTH DIAGNOSIS S-16.0 FROM/ENTRY DATE S-17.0 THROUGH/EXIT DATE S-23.0 DATE OF SERVICE S-24.0 PLACE OF SERVICE	Service
Procedure Code Details	S-06.0 SERVICE FUNCTION	Service
Coverage Plan Details	S-14.0 COUNTY/CITY/MENTAL HEALTH PLAN WITH FISCAL RESPONSIBILITY FOR CLIENT	Service
Client Coverage Plans	S-27.0 CLIENT INDEX NUMBER (CIN)	Service
System Generated	H-01.0 COUNTY/CITY/MENTAL HEALTH PLAN SUBMITTING RECORD (SUBMITTING COUNTY CODE) H-03.0 RECORD TYPE H-04.0 TRANSACTION CODE X-0.1.0 Test-Prod-Indicator X-02.0 FROM REPORT PERIOD X-03.0 THROUGH REPORT PERIOD X-04.0 CREATION DATE X-05.0 KEY CHANGE RECORD COUNT X-06.0 CLIENT RECORD COUNT	Control/Headers Client

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SmartCare Screen	Description of Data	File Reported To
	X-07.0 SERVICE RECORD COUNT X-08.0 PERIODIC RECORD COUNT X-09.0 Assessment-Record-Count C-11.0 DATA INFRASTRUCTURE GRANT INDICATOR	
TEDS Details	A-01.0 Assessment Reference Number	Assessment

## File Logic

### Record Types

The CSI records are reported as four distinct record types, each with their own logic that drives the extraction of data for the submission file.

#### Client Record

The Client Record is the first record submitted for any client.

For a record to be included as a Client 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 CSI Standalone Collection Document

#### Periodic Record

The Periodic Record is used to report the periodic data set at time of admission and annually thereafter. This data is collected using the CSI Standalone Collection Document.

For a record to be included as a Periodic 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 CSI Standalone Collection Document which submitted a Client Record and was accepted
  - a. This can be collected using the same CSI Collection Document used to collect the Periodic data and submitted concurrently.

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## Assessment Record

The Assessment Record includes the CSI timeliness data collected using the CSI Assessment DFA. This may be done as part of the CSI Standalone Collection Document or as a standalone DFA.

For a record to be included as an Assessment 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 CSI Collection Document which submitted a Client Record and was accepted.
  - a. This can be collected using the same CSI Collection Document used to collect the Assessment data and submitted concurrently.
3. If the Assessment data collected using the CSI Collection Document did not include all requirements to submit an Assessment Record per the CSI Data Dictionary, then the client must also have a completed standalone CSI Assessment DFA.

## Service Record

The Service Record includes the service data for CSI reportable services completed for the client. This data comes from the SmartCare service record along with some data collected using the CSI Standalone Collection Document at the episode level.

For a record to be included as an Service 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 CSI Collection Document which submitted a Client Record and was accepted.
3. The client must have a completed service for a procedure code with the setup and configuration detailed in the System Setup section of this guide.

## Key Change Record

The Key Change Record is the only record not tied to data collection via documents or other input screens. Rather the system will generate a Key Change Record when a SmartCare Client Id is merged with another Client Id in the system.

For a record to be included as a Key Change 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.

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2. The client must have a completed CSI Collection Document which submitted a Client Record and was accepted for the Client ID that was established first.
3. The client must have a completed CSI Collection Document which submitted a Client Record and was accepted for the Client ID that was established second.
4. The two established Client IDs must be merged in SC using Administration > Merge Clients.
  - a. A Key Change record will then be created for the extinguished Client ID (Source CCN) and the continuing Client ID (Target CCN) so the state database may delete/update associated Client, Service, Periodic and Assessment records accordingly.

## System Setup

In order to properly submit acceptable data the environment needs to be configured with allowable values and configurations.

### Global Codes

All of the Global Codes which need to be set up are in the Global Codes tab of the CSI File Mapping spreadsheet. Please reference the File Mapping for details.

### External Mapping

The ExternalMapping table is used to map either Core or customer defined Place of Service values to the CSI reportable values. These should be reviewed as part of the File Mapping. Any customer defined mapping should be provided to the DACS PM to be loaded into the customer environment.

### Programs

CSI reporting will use a combination of Program setup and TEDS functionality to accurately compile the records. For further information on setting up and configuring the TEDS screens please reference the California TEDS User Guide.

To set the required program information navigate to Administration > Programs, click the Program Name from the list to open the Program Details Navigate to the Custom Fields Tab. Within this tab is the California Reporting section in which 2 fields are required.

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1. CSI Mode of Service- this field indicates the Mode of Service and is required for reporting Service Records.
2. MH Provider ID - this is a required 4 digit field for reporting the Provider Number for Service Records.

## Procedure Code

To accurately report Service Records, CSI reportable services require configuration of the associated Procedure Code.

To set the required information navigate to Administration > Programs/Rates, click the Procedure Name from the list to open the Procedure Code Details. Navigate to the Custom Fields Tab.

1. CSI Service Function - this value indicates the CSI Service Function Code that is required for Service Record reporting.

## 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 CSI Documents. 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>

FIPS	County	FIPS	County	FIPS	County	FIPS	County

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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		

## 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 CSI Documents
  - a. Select Permission Type > Document Codes (View)
  - b. Grant CSI Standalone Collection Document
  - c. Select Permission Type > Screens
  - d. Grant CSI Admission and CSI Update/Discharge
2. To edit CSI Documents

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

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