

# User Guide: CSI Standalone Collection

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## User Guide: CSI

### General Information

The CSI Standalone Collection document is utilized in SmartCare to complete the information gathering for clients for county level state reporting. Client requires regular updates to be done for 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:

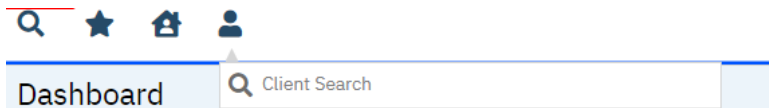
- Enroll client into the CSI program you are completing this form for.

### Navigating to and Creating the CSI Standalone Collection 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:

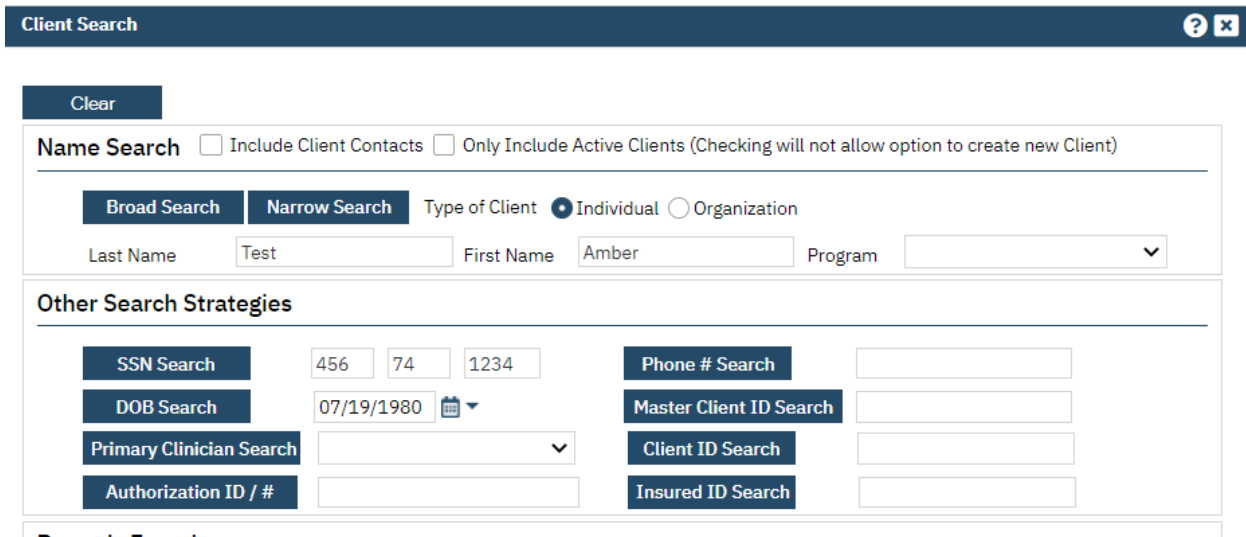


You will be presented with the 'Client Search' screen. On this screen, you will be able to search for a client by a number of parameters.

- 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

- 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.



The screenshot shows the 'Client Search' window. At the top is a 'Clear' button. Below it is the 'Name Search' section with checkboxes for 'Include Client Contacts' and 'Only Include Active Clients (Checking will not allow option to create new Client)'. There are two search modes: 'Broad Search' and 'Narrow Search'. The 'Type of Client' is set to 'Individual' (radio button selected) with an option for 'Organization'. Search fields include 'Last Name' (Test), 'First Name' (Amber), and 'Program' (dropdown). Below this is the 'Other Search Strategies' section with several search buttons and input fields: 'SSN Search' (456, 74, 1234), 'DOB Search' (07/19/1980), 'Primary Clinician Search' (dropdown), 'Authorization ID / #' (input), 'Phone # Search' (input), 'Master Client ID Search' (input), 'Client ID Search' (input), and 'Insured ID Search' (input).

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

Client Search
?
✕

Clear

**Name Search**  Include Client Contacts  Only Include Active Clients (Checking will not allow option to create new Client)

---

Broad Search

Narrow Search

Type of Client  Individual  Organization

Last Name

First Name

Program

---

**Other Search Strategies**

SSN Search

DOB Search

Primary Clinician Search

Authorization ID / #

Phone # Search

Master Client ID Search

Client ID Search

Insured ID Search

---

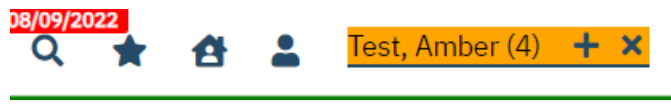
**Records Found**

	ID	Master ID	Client Name	SSN/EIN	DOB	Status	City	Primary Clinician
4	4		Test, Amber	1234	07/19/2010	Active	Auburn	Lindemann, Ashley

Select

Cancel

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.

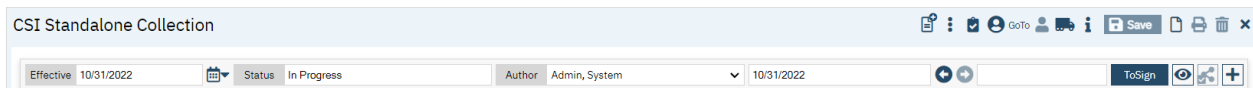
By using the magnifying glass to search for the CSI Standalone Collection document you can search for the assessment or locate the assessment using a quick link.



## CSI Document

### General

Under the CSI Document label, note the information pertaining to the status of the document.



The screenshot shows the top section of a web form titled "CSI Standalone Collection". It includes a toolbar with icons for save, print, and close. Below the toolbar, there are several input fields: "Effective" with a date picker set to 10/31/2022, "Status" with a dropdown menu set to "In Progress", "Author" with a dropdown menu set to "Admin, System", and another "Effective" date field set to 10/31/2022. There is also a "ToSign" button and a plus icon for additional options.

We will explore these fields more thoroughly when completing the CSI 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.

Beneath the authorship, status, and effective date fields, information in the CSI document is broken out into two possible tabs:

- Client Information
- CSI Assessment

In completing your client's CSI document, you will navigate across the tabs, left to right, beginning with Update/Discharge, but you can jump around as often as you like, as long as all required fields are completed prior to signing.

Each tab on the CSI, as you will note throughout SmartCare, is broken out into sections. We will look at each section per tab in turn, paying specific attention to which fields have been required by your organization.

## Client Information

### Client Record

Client Information		CSI Assessment	
<b>Client Record</b>			
Client ID	1007	County of Submission	Butte
First Name at Birth	test	Last Name at Birth	test
Middle Name at Birth	test	Suffix at Birth	JR
Mother's First Name	test	Date of Birth	1970/1/1
Place of Birth - Country	ARUBA	Place of Birth - State	Not a US State
Place of Birth - County	Not a California	Gender	Male
Primary Language	Croatian	Preferred Language	French
Is the client of Hispanic or Latino ethnicity?	Yes	Race(s)	<input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian Indian <input type="checkbox"/> Black or African American

- County of Submission – Not seen in screenshot above
  - If your organization is the county level provider or a CBO who only reports to one county, then this field will not show due to configuration. See Set Up Considerations – Configuration Keys section for more information.
  - If your organization is providing services on contract for more than one county and will report to the counties, then you must select the county from this drop down. Your organization can hide counties that you do not provide services for within the global code category. See Set Up Considerations – Configuration Keys section for more information on how to hide counties from the drop down.
  - **This is a required field.**
- First Name at Birth
  - This field will initialize from client’s first name in record if no previous CSI document exists, otherwise it will initialize from most recently signed CSI Document. It can be modified. It will not update the client record if you modify it on this form.
  - Max 15 Characters
  - **This is a required field.**
- Middle Name at Birth

- This field will initialize from client's middle name in record if no previous CSI document exists, otherwise it will initialize from most recently signed CSI Document. It can be modified. It will not update the client record if you modify it on this form.
  - Max 15 Characters
- Last Name at Birth
  - This field will initialize from client's last name in record if no previous CSI document exists, otherwise it will initialize from most recently signed CSI Document. It can be modified. It will not update the client record if you modify it on this form.
  - Max 20 Characters
  - **This is a required field.**
- Suffix at Birth
  - User can select a value from the following values:
    - JR
    - SR
    - II
    - III
    - IV
  - This field will initialize from client's Suffix in record if no previous CSI document exists, otherwise it will initialize from most recently signed CSI Document. It can be modified. It will not update the client record if you modify it on this form.
- Mother's First Name
  - This field will initialize from most recently signed CSI document, if one exists.
  - Max 15 Characters
  - **This is a required field.**
- Date of Birth – This is a Read Only field. It will initialize from the client record.
- Place of Birth – Country
  - User can choose from the following values:
    - Country Not Listed
    - Unknown Country
    - United States
    - Any other country in the list



- This field will initialize from most recently signed CSI document, if one exists.
  - **This is a required field.**
- Place of Birth - State
  - User can select from the following values:
    - Not a US State
    - Unknown State
    - Any state in the list
  - If client was born in any country other than United States, then this value will default to Not a US State and become Read Only.
  - This field will initialize from most recently signed CSI document, if one exists.
  - **This is a required field.**
- Place of Birth - County
  - User can select from the following values:
    - Not a California County
    - Unknown County
    - Any California County in the list.
  - If Client was born in any country other than the United States OR Client was born in any state other than California, then this value will default to Not a California County and become Read Only.
  - This field will initialize from most recently signed CSI document, if one exists.
  - **This field is required.**
- Gender
  - User can select one of the following values
    - Male
    - Female
    - Other
    - Unknown
  - This field will initialize from most recently signed CSI Document, if one exists.
  - **This is a required field.**
- Primary Language
  - User can select from the following values:

- 0 = American Sign Language (ASL)
- 1 = Spanish
- 2 = Cantonese
- 3 = Japanese
- 4 = Korean
- 5 = Tagalog
- 6 = Other Non-English
- 7 = English
- A = Other Sign Language
- B = Mandarin
- C = Other Chinese Dialects
- D = Cambodian
- E = Armenian
- F = Ilocano
- G = Mien
- 9 = Unknown / Not Reported
- H = Hmong
- I = Lao
- J = Turkish
- K = Hebrew
- L = French
- M = Polish

- N = Russian
- P = Portuguese
- Q = Italian
- R = Arabic
- S = Samoan
- T = Thai
- U = Farsi
- V = Vietnamese
- This field will initialize from most recently signed CSI Document, if one exists.
- **This is a required field.**
- Preferred Language
  - User can select from the following values:
    - 0 = American Sign Language (ASL)
    - 1 = Spanish
    - 2 = Cantonese
    - 3 = Japanese
    - 4 = Korean
    - 5 = Tagalog
    - 6 = Other Non-English
    - 7 = English
    - A = Other Sign Language
    - B = Mandarin
    - C = Other Chinese Dialects
    - D = Cambodian

- E = Armenian
- F = Ilocano
- G = Mien
- 9 = Unknown / Not Reported
- H = Hmong
- I = Lao
- J = Turkish
- K = Hebrew
- L = French
- M = Polish
- N = Russian
- P = Portuguese
- Q = Italian
- R = Arabic
- S = Samoan
- T = Thai
- U = Farsi
- V = Vietnamese
- This field will initialize from most recently signed CSI Document, if one exists.
- **This is a required field.**
- Is the client of Hispanic or Latino ethnicity?
  - User can select from the following values:
    - Yes
    - No

- Unknown
  - This field will initialize from most recently signed CSI Document, if one exists.
  - **This is a required field.**
- Race(s)
  - User can select multiple of the following values (up to 5 total)
    - 1 = White or Caucasian
    - 3 = Black or African American
    - 5 = American Indian or Alaska Native
    - 7 = Filipino
    - 8 = Other
    - 9 = Unknown / Not Reported
    - C = Chinese
    - H = Cambodian
    - I = Hmong
    - J = Japanese
    - K = Korean
    - L = Other Pacific Islander
    - M = Samoan
    - N = Asian Indian
    - O = Other Asian
    - P = Native Hawaiian
    - R = Guamanian
    - S = Mien
    - T = Laotian

- V = Vietnamese
- This field will initialize from most recently signed CSI document, if one exists.
- **This field is required.**

### Global Codes

Field Name	Global Code Category Name
Suffix at Birth	CLIENTNAMESUFFIX
Gender	
Place of Birth - Country	XCABirthCountry
Place of Birth - State	XCADriverLicState
Place of Birth - County	XCABirthCounty
Primary Language	LANGUAGE
Preferred Language	LANGUAGE
Race(s)	XCACSIRace
Is the Client of Hispanic or Latino ethnicity?	XCALatino

## Additional Client Information

Additional Client Information			
Current First Name	<input type="text" value="Kim"/>	Current Last Name	<input type="text" value="Test"/>
Current Middle Name	<input type="text"/>	Current Suffix	<input type="text" value="v"/>
Social Security Number	<input type="text" value="999999999"/>	Client Index Number (CIN)	<input type="text"/>
Has the Client Experienced a Traumatic Event?	<input type="text" value="v"/>	Special Population	<input type="text" value="v"/>
<input type="checkbox"/> Client is being admitted to an acute 24-Hour Mental Health Service			
Legal Class at Admission	<input type="text" value="v"/>	Admission Necessity Code	<input type="text" value="v"/>
<input type="checkbox"/> Client is being discharged from an acute 24-Hour Mental Health Service			
Legal Class at Discharge	<input type="text" value="v"/>	Patient Status Code	<input type="text" value="v"/>
<b>General Medical Condition(s)</b>			
1.	<input type="text" value="v"/>	2.	<input type="text" value="v"/>
		3.	<input type="text" value="v"/>
Does the client have a Substance Abuse/Dependence issue? <input type="text" value="v"/>			

- Current first name
  - This field will initialize from client's first name in record. It will not update the client record if you modify it on this form.
  - Max 15 Characters
  - **This is a required field.**
- Current Middle Name
  - This field will initialize from client's first name in record. It will not update the client record if you modify it on this form.
  - Max 15 Characters
  - **This is a required field.**
- Current last name
  - This field will initialize from client's first name in record. It will not update the client record if you modify it on this form.
  - Max 20 Characters
  - **This is a required field.**
- Current Suffix
  - User can select a value from the following values:
    - JR
    - SR

- II
- III
- IV
- This field will initialize from client's Suffix in record. It can be modified. It will not update the client record if you modify it on this form.
- **This is a required field.**
- What is the client's social security number?
  - This will initialize from the client record and is read only.
    - It will initialize from Pseudo SSN, if one exists, otherwise from client record SSN field.
- Client Index Number (CIN)
  - This will initialize from client coverage plan insured ID that is mapped to Medi-Cal.
    - See Set Up Considerations to learn how coverage plan must be set up to map to Medi-Cal.
  - If blank, user must enter the insured ID and rules are as follows:
    - Must begin with 9, followed by 7 numeric digits and ends with A, C through H, M, N, S through Y.
  - the client record if you modify it on this form.
  - **This is a required field.**
- Has the client experienced a traumatic event?
  - User can select from the following values:
    - Yes
    - No
    - Unknown
  - This field will initialize from most recently signed CSI document, if one exists.
  - **This field is required.**
- Special Population
  - User can select from the following values:
    - N = No special population service(s)
    - A = Assisted Outpatient Treatment service(s) (AB 1421)



- C = Individualized Education Plan (IEP) required service(s) (AB 3632)
- G = Governors Homeless Initiative (GHI) service(s)
- W = Welfare-to-Work plan specified service(s)
- This field will initialize from most recently signed CSI document, if one exists.
- **This field is required.**
- District of Residence
  - Limited to 7 characters
  - **This field is required when user selected ‘Individualized Education Plan (IEP)...’ as a response to the previous question. Any other selection to the previous field and this field is hidden.**
  - This field will initialize from most recently signed CSI document, if one exists.
- Client is being admitted to an acute 24-Hour Mental Health Services
  - This is an optional checkbox.
- Legal Class at Admission
  - User can select from the following values:
    - Voluntary
    - 72 Hour Evaluation and Treatment for Adults
    - 72 Hour Evaluation and Treatment for Children
    - 14 Day Intensive Treatment
    - Additional 14 Day Hold
    - Additional 30 Day Hold
    - Additional 180 Day Hold
    - Other involuntary civil status
    - Charges and/or convictions pending
    - Determination of competency to stand trial
    - Found “not guilty by reason of insanity” or “guilty but insane”
    - Determination of sexual psychopathy and related legal categories

- Transferred from correctional facilities
- Other involuntary criminal status
- Unknown / Not Reported
- **This field is only required when user selects 'Client is being admitted to an acute 24-Hour Mental Health Services' checkbox.**
- Admission Necessity Code
  - User can select from the following values:
    - Emergency
    - Planned (Prior Authorization)
    - Unknown/Not Reported
  - **This field is only required when user selects 'Client is being admitted to an acute 24-Hour Mental Health Services' checkbox.**
- Client is being discharged from an acute 24-Hour Mental Health Service
  - This is an optional checkbox.
- Legal Class at Discharge
  - User can select from the following values:
    - Voluntary
    - 72 Hour Evaluation and Treatment for Adults
    - 72 Hour Evaluation and Treatment for Children
    - 14 Day Intensive Treatment
    - Additional 14 Day Hold
    - Additional 30 Day Hold
    - Additional 180 Day Hold
    - Other involuntary civil status
    - Charges and/or convictions pending
    - Determination of competency to stand trial

- Found “not guilty by reason of insanity” or “guilty but insane”
- Determination of sexual psychopathy and related legal categories
- Transferred from correctional facilities
- Other involuntary criminal status
- Unknown / Not Reported
- **This field is only required when user selects ‘Client is being discharged from an acute 24-Hour Mental Health Services’ checkbox.**
- Patient Status Code
  - User can select from the following values:
    - Still a patient or expected to return
    - Discharged to home, self care, foster care, shelter care
    - Discharged/transferred to Residential/Board and Care (not locked, supervised living, no treatment)
    - Discharged/transferred to Community Residential Treatment (not locked, custodial)
    - Discharged/transferred to Community Treatment Facility (locked, no nursing care)
    - Discharged/transferred to Skilled Nursing Facility/Intermediate Care Facility (unlocked or locked)
    - Discharged/transferred to Acute Care Hospital or Psychiatric Health Facility (PHF)
    - Discharged/transferred to State Hospital
    - Discharged/transferred to Jail
    - Unplanned discharge
    - Expired
    - Other

- Unknown / Not Reported
- **This field is only required when user selects 'Client is being discharged from an acute 24-Hour Mental Health Services' checkbox.**
- General Medical Conditions 1, 2 and 3
  - For each field, User can select from the following values:
    - No general medical condition
    - 01 = Arterial Sclerotic Disease
    - 02 = Heart Disease
    - 03 = Hypercholesterolemia
    - 04 = Hyperlipidemia
    - 05 = Hypertension
    - 06 = Birth Defects
    - 07 = Cystic Fibrosis
    - 08 = Psoriasis
    - 09 = Digestive Disorders (Reflux, Irritable Bowel Syndrome)
    - 10 = Ulcers
    - 11 = Cirrhosis
    - 12 = Diabetes
    - 13 = Infertility
    - 14 = Hyperthyroid
    - 15 = Obesity
    - 16 = Anemia
    - 17 = Allergies
    - 18 = Hepatitis

- 19 = Arthritis
  - 20 = Carpal Tunnel Syndrome
  - 21 = Osteoporosis
  - This will initialize from the most recently signed CSI Document, if one exists.
  - **Each field requires a value**
  - If user selects No General Medical Condition for field 1, then field 2 and 3 will default to No General Medical Condition
  - If user selects No General Medical Condition for only field 2, then field 3 will default to No General Medical Condition.
- Does the Client have a substance abuse/dependence issue?
  - User can select from the following values:
    - Yes, the client has a substance abuse / dependence issue
    - No, the client does not have a substance abuse / dependence issue
    - Unknown
    - Not Reported
  - This field will initialize from most recently signed CSI document, if one exists.
  - **This field is required.**
- Substance Abuse/Dependence Diagnosis
  - This field is not shown in the screenshot and only appears when user selects Yes to the previous question. It is required when it is shown.
  - User is type search and to select from the following values:
    - Any from the Allowable CSI Sub Use Dep Dx table below
  - This field will initialize from most recently signed CSI document, if one exists.

### Global Codes

Field Name	Global Code Category Name
Current Suffix	CLIENTNAMESUFFIX
Has the client experienced a traumatic event?	TraumaticEvent
Special Population	XCACSIspecialPop

Legal class at admission	LegalClass
Admission necessity code	AdmissionNecessity
Legal class at discharge	LegalClass
Patient status code	PatientStatus
General Medical Conditions	XCAMedicalCondition
Does the client have a substance abuse/dependence issue?	XCAClientAbusedep

## Periodic Record

**Periodic Record**

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Current Employment Status  Highest Completed Education Level

Conservatorship/Court Status  Living Arrangement

# of Persons under the age of 18 the client is responsible for more than 50% of the time

# of Persons over the age of 17 the client is responsible for more than 50% of the time

- Current Employment Status
  - User can choose from the following values:
    - A = Full time, 35 hours or more per week in competitive job market
    - B = Part time, less than 35 hours per week in competitive job market
    - C = Full time, 35 hours or more per week in noncompetitive job market
    - D = Part time, less than 35 hours per week in noncompetitive job market
    - Not in the paid work force
    - E = Actively looking for work
    - F = Homemaker
    - G = Student

- H = Volunteer Worker
- I = Retired
- J = Resident / inmate of institution
- K = Other
- U = Unknown / Not Reported
- This field initializes from most recently signed CSI document, if one exists.
- **This field is required.**
- Highest Completed Education Level
  - User can select from the following options:
    - None
    - Kindergarten
    - Grade 1
    - Grade 2
    - Grade 3
    - Grade 4
    - Grade 5
    - Grade 6
    - Grade 7
    - Grade 8
    - Grade 9
    - Grade 10
    - Grade 11
    - Grade 12
    - Grade 13

- Grade 14
- Grade 15
- Grade 16
- Grade 17
- Grade 18
- Grade 19
- Grade 20
- GED
- Bachelor's
- Master's
- Doctorate
- Other Postsecondary Education Program
- Other - Includes vocational education and training
- Unknown / Not Reported
- This field initializes from most recently signed CSI document, if one exists.
- **This field is required.**
- Conservatorship/Court Status
  - User can select from the following values:
    - Payee Without Conservatorship (W&I Code, Section 5686)
    - G = Juvenile Court, Dependent of the Court (W&I Code, Section 300)
    - H = Juvenile Court, Ward - Status Offender (W&I Code, Section 601)
    - I = Juvenile Court, Ward - Juvenile Offender (W&I Code, Section 602)
    - J = Not Applicable
    - U = Unknown / Not Reported



- This field initializes from most recently signed CSI document, if one exists.
- **This field is required.**
- Living Arrangement
  - User can select from the following values:
    - A = House or apartment (includes trailers, hotels, dorms, barracks, etc.)
    - B = House or apartment and requiring some support with daily living activities (applies to adults only)
    - C = House or apartment and requiring daily support and supervision (applies to adults only)
    - D = Supported housing (applies to adults only)
    - E = Foster family home
    - F = Group Home (includes Levels 1-12 for children)
    - G = Residential Treatment Center (includes Levels 13-14 for children)
    - H = Community Treatment Facility
    - I = Board and Care
    - J = Adult Residential Facility, Social Rehabilitation Facility, Crisis Residential, Transitional Residential, Drug Facility, Alcohol Facility
    - K = Mental Health Rehabilitation Center (24 hour)
    - L = Skilled Nursing Facility/Intermediate Care Facility/Institute of Mental Disease (IMD)
    - M = Inpatient Psychiatric Hospital, Psychiatric Health Facility (PHF), or Veterans Affairs (VA) Hospital
    - N = State Hospital
    - O = Justice related (Juvenile Hall, CYA home, correctional facility, jail, etc.)
    - P = Homeless, no identifiable residence
    - Q = Other

- U = Unknown / Not Reported
  - This field initializes from most recently signed CSI document, if one exists.
  - **This field is required.**
- # of Persons under the age of 18 the client is responsible for more than 50% of the time
  - Allowable values
    - 0-99
  - This field initializes from most recently signed CSI document, if one exists.
  - **This field is required.**
- # of Persons over the age of 17 the client is responsible for more than 50% of the time
  - Allowable values
    - 0-99
  - This field initializes from most recently signed CSI document, if one exists.
  - **This field is required.**

### Global Codes

Field Name	Global Code Category Name
Current Employment Status	XCAEmpStatus
Highest Completed Education Level	XCAHighCompEdu
Conservatorship/Court Status	Conservatorship
Living Arrangement	XCALivingArrangement

### CSI Assessment

This tab may be hidden for your organization. When hidden, you must complete this as a stand alone document called 'CSI Assessment'. See Set Up Considerations, Configuration Key section below for how to hide this tab when requiring staff to do as stand alone.

This tab/document does not have to be done if user has had an active CSI Episode where there is NO discharge OR discharge happened less than 12 months ago.

None of the fields on this tab are required to sign this document. The file will not be sent until all required fields are captured whether that be on this form on the standalone CSI Assessment Document.

## CSI Assessment

### CSI Assessment Instructions

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	<input type="text"/>				
First Offered Assessment Appointment Date	<input type="text"/>	Second Offered Assessment Appointment Date	<input type="text"/>	Third Offered Assessment Appointment Date	<input type="text"/>
Accepted Assessment Appointment Date	<input type="text"/>	Assessment Start Date	<input type="text"/>	Assessment End Date	<input type="text"/>
First Offered Treatment Appointment Date	<input type="text"/>	Second Offered Treatment Appointment Date	<input type="text"/>	Third Offered Treatment Appointment Date	<input type="text"/>
Accepted Treatment Appointment Date	<input type="text"/>	Treatment Start Date	<input type="text"/>	Closure Reason	<input type="text"/>
Closed Out Date	<input type="text"/>	Referred To	<input type="text"/>		

- 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.
- 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
  - 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
  - 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

- 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
  - This will initialize as the same date of Accepted Assessment Appointment Date, once the status = Complete.
- First Offered Treatment 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 Assessment Start date.
- Second Offered Treatment 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 Treatment Appointment Date.
- Third Offered Treatment Appointment Date
  - 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
  - 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
  - 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
  - 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
  - **If user enters a Closed Out Date, this field is required.**
- Closed out Date
  - **This field is required when user enters a Closure Reason.**
- Referred To
  - User can select one of the following values:
    - Managed Care Plan
    - Fee-For-Service Provider
    - Other(Specify)
    - No Referral
- Other
  - This field only shows and is required when user selects 'Other (specify)' to the previous question.

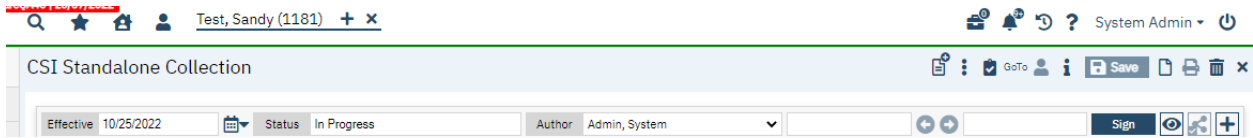
## Completing the CSI Document

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 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.

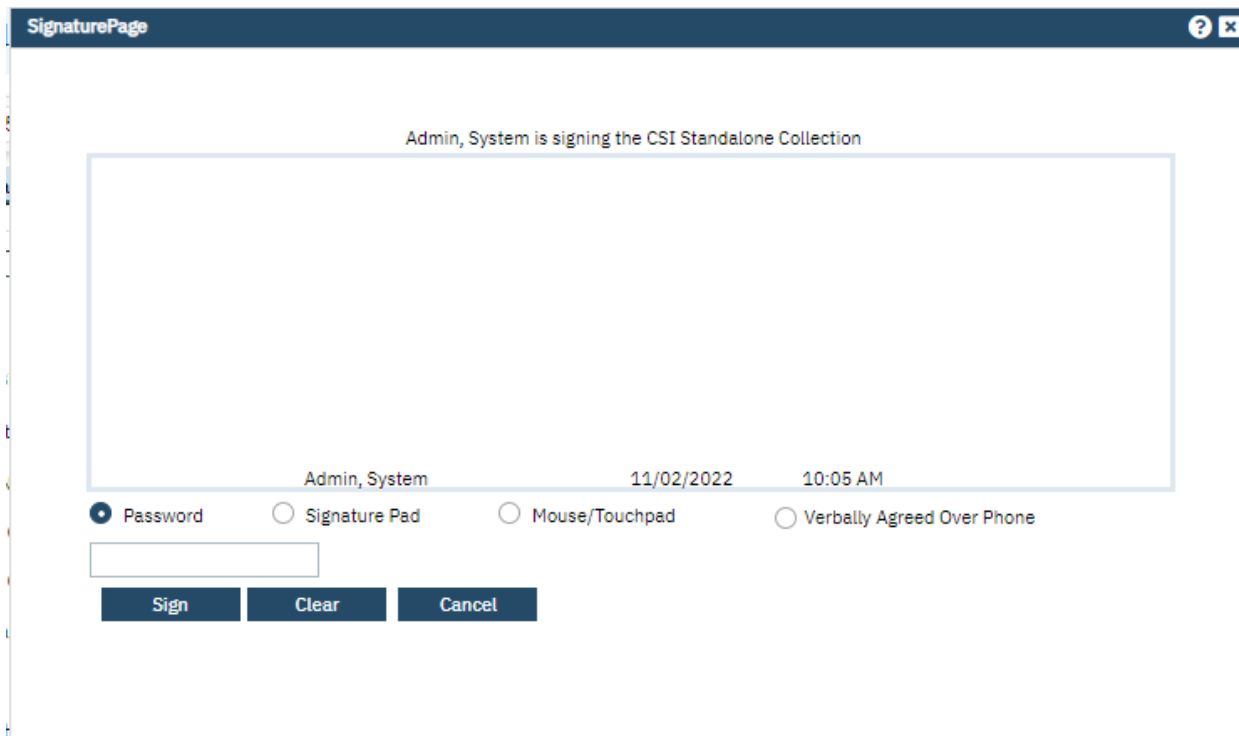


When you click the sign button, if you have fields that are required that you did not enter data into, you will receive a validation message like the one below.



The validation message will tell you exactly where you need to go to complete the requirement. The first part of the message (e.g. Admission) will tell you on what tab you will find the requirement on. The second part of the message (e.g. CalOMS Admission) will tell you which section to find the requirement in. The third part of the message (e.g Form Serial Number is required) 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.

## References

### CSI Sub Use Dep Dx

Code	Description
F10.10	Alcohol abuse, uncomplicated
F10.11	Alcohol abuse, in remission
F10.120	Alcohol abuse with intoxication, uncomplicated
F10.121	Alcohol abuse with intoxication delirium
F10.129	Alcohol abuse with intoxication, unspecified
F10.130	Alcohol abuse with withdrawal, uncomplicated
F10.131	Alcohol abuse with withdrawal delirium
F10.132	Alcohol abuse with withdrawal with perceptual disturbance
F10.139	Alcohol abuse with withdrawal, unspecified

F10.14	Alcohol abuse with alcohol-induced mood disorder
F10.150	Alcohol abuse with alcohol-induced psychotic disorder with delusions
F10.151	Alcohol abuse with alcohol-induced psychotic disorder with hallucinations
F10.159	Alcohol abuse with alcohol-induced psychotic disorder, unspecified
F10.180	Alcohol abuse with alcohol-induced anxiety disorder
F10.181	Alcohol abuse with alcohol-induced sexual dysfunction
F10.182	Alcohol abuse with alcohol-induced sleep disorder
F10.188	Alcohol abuse with other alcohol-induced disorder
F10.19	Alcohol abuse with unspecified alcohol-induced disorder
F10.20	Alcohol dependence, uncomplicated
F10.21	Alcohol dependence, in remission
F10.220	Alcohol dependence with intoxication, uncomplicated
F10.221	Alcohol dependence with intoxication delirium
F10.229	Alcohol dependence with intoxication, unspecified
F10.230	Alcohol dependence with withdrawal, uncomplicated
F10.231	Alcohol dependence with withdrawal delirium
F10.232	Alcohol dependence with withdrawal with perceptual disturbance
F10.239	Alcohol dependence with withdrawal, unspecified
F10.24	Alcohol dependence with alcohol-induced mood disorder
F10.250	Alcohol dependence with alcohol-induced psychotic disorder with delusions
F10.251	Alcohol dependence with alcohol-induced psychotic disorder with hallucinations
F10.259	Alcohol dependence with alcohol-induced psychotic disorder, unspecified
F10.26	Alcohol dependence with alcohol-induced persisting amnesic disorder
F10.27	Alcohol dependence with alcohol-induced persisting dementia
F10.280	Alcohol dependence with alcohol-induced anxiety disorder
F10.281	Alcohol dependence with alcohol-induced sexual dysfunction
F10.282	Alcohol dependence with alcohol-induced sleep disorder
F10.288	Alcohol dependence with other alcohol-induced disorder
F10.29	Alcohol dependence with unspecified alcohol-induced disorder
F10.920	Alcohol use, unspecified with intoxication, uncomplicated
F10.921	Alcohol use, unspecified with intoxication delirium
F10.929	Alcohol use, unspecified with intoxication, unspecified
F10.930	Alcohol use, unspecified with withdrawal, uncomplicated



F10.931	Alcohol use, unspecified with withdrawal delirium
F10.932	Alcohol use, unspecified with withdrawal with perceptual disturbance
F10.939	Alcohol use, unspecified with withdrawal, unspecified
F10.94	Alcohol use, unspecified with alcohol-induced mood disorder
F10.950	Alcohol use, unspecified with alcohol-induced psychotic disorder with delusions
F10.951	Alcohol use, unspecified with alcohol-induced psychotic disorder with hallucinations
F10.959	Alcohol use, unspecified with alcohol-induced psychotic disorder, unspecified
F10.96	Alcohol use, unspecified with alcohol-induced persisting amnesic disorder
F10.97	Alcohol use, unspecified with alcohol-induced persisting dementia
F10.980	Alcohol use, unspecified with alcohol-induced anxiety disorder
F10.981	Alcohol use, unspecified with alcohol-induced sexual dysfunction
F10.982	Alcohol use, unspecified with alcohol-induced sleep disorder
F10.988	Alcohol use, unspecified with other alcohol-induced disorder
F10.99	Alcohol use, unspecified with unspecified alcohol-induced disorder
F11.10	Opioid abuse, uncomplicated
F11.11	Opioid abuse, in remission
F11.120	Opioid abuse with intoxication, uncomplicated
F11.121	Opioid abuse with intoxication delirium
F11.122	Opioid abuse with intoxication with perceptual disturbance
F11.129	Opioid abuse with intoxication, unspecified
F11.13	Opioid abuse with withdrawal
F11.14	Opioid abuse with opioid-induced mood disorder
F11.150	Opioid abuse with opioid-induced psychotic disorder with delusions
F11.151	Opioid abuse with opioid-induced psychotic disorder with hallucinations
F11.159	Opioid abuse with opioid-induced psychotic disorder, unspecified
F11.181	Opioid abuse with opioid-induced sexual dysfunction
F11.182	Opioid abuse with opioid-induced sleep disorder
F11.188	Opioid abuse with other opioid-induced disorder
F11.19	Opioid abuse with unspecified opioid-induced disorder
F11.20	Opioid dependence, uncomplicated
F11.21	Opioid dependence, in remission
F11.220	Opioid dependence with intoxication, uncomplicated

F11.221	Opioid dependence with intoxication delirium
F11.222	Opioid dependence with intoxication with perceptual disturbance
F11.229	Opioid dependence with intoxication, unspecified
F11.23	Opioid dependence with withdrawal
F11.24	Opioid dependence with opioid-induced mood disorder
F11.250	Opioid dependence with opioid-induced psychotic disorder with delusions
F11.251	Opioid dependence with opioid-induced psychotic disorder with hallucinations
F11.259	Opioid dependence with opioid-induced psychotic disorder, unspecified
F11.281	Opioid dependence with opioid-induced sexual dysfunction
F11.282	Opioid dependence with opioid-induced sleep disorder
F11.288	Opioid dependence with other opioid-induced disorder
F11.29	Opioid dependence with unspecified opioid-induced disorder
F11.90	Opioid use, unspecified, uncomplicated
F11.920	Opioid use, unspecified with intoxication, uncomplicated
F11.921	Opioid use, unspecified with intoxication delirium
F11.922	Opioid use, unspecified with intoxication with perceptual disturbance
F11.929	Opioid use, unspecified with intoxication, unspecified
F11.93	Opioid use, unspecified with withdrawal
F11.94	Opioid use, unspecified with opioid-induced mood disorder
F11.950	Opioid use, unspecified with opioid-induced psychotic disorder with delusions
F11.951	Opioid use, unspecified with opioid-induced psychotic disorder with hallucinations
F11.959	Opioid use, unspecified with opioid-induced psychotic disorder, unspecified
F11.981	Opioid use, unspecified with opioid-induced sexual dysfunction
F11.982	Opioid use, unspecified with opioid-induced sleep disorder
F11.988	Opioid use, unspecified with other opioid-induced disorder
F11.99	Opioid use, unspecified with unspecified opioid-induced disorder
F12.10	Cannabis abuse, uncomplicated
F12.11	Cannabis abuse, in remission
F12.120	Cannabis abuse with intoxication, uncomplicated
F12.121	Cannabis abuse with intoxication delirium
F12.122	Cannabis abuse with intoxication with perceptual disturbance
F12.129	Cannabis abuse with intoxication, unspecified

F12.13	Cannabis abuse with withdrawal
F12.150	Cannabis abuse with psychotic disorder with delusions
F12.151	Cannabis abuse with psychotic disorder with hallucinations
F12.159	Cannabis abuse with psychotic disorder, unspecified
F12.180	Cannabis abuse with cannabis-induced anxiety disorder
F12.188	Cannabis abuse with other cannabis-induced disorder
F12.19	Cannabis abuse with unspecified cannabis-induced disorder
F12.20	Cannabis dependence, uncomplicated
F12.21	Cannabis dependence, in remission
F12.220	Cannabis dependence with intoxication, uncomplicated
F12.221	Cannabis dependence with intoxication delirium
F12.222	Cannabis dependence with intoxication with perceptual disturbance
F12.229	Cannabis dependence with intoxication, unspecified
F12.23	Cannabis dependence with withdrawal
F12.250	Cannabis dependence with psychotic disorder with delusions
F12.251	Cannabis dependence with psychotic disorder with hallucinations
F12.259	Cannabis dependence with psychotic disorder, unspecified
F12.280	Cannabis dependence with cannabis-induced anxiety disorder
F12.288	Cannabis dependence with other cannabis-induced disorder
F12.29	Cannabis dependence with unspecified cannabis-induced disorder
F12.90	Cannabis use, unspecified, uncomplicated
F12.920	Cannabis use, unspecified with intoxication, uncomplicated
F12.921	Cannabis use, unspecified with intoxication delirium
F12.922	Cannabis use, unspecified with intoxication with perceptual disturbance
F12.929	Cannabis use, unspecified with intoxication, unspecified
F12.93	Cannabis use, unspecified with withdrawal
F12.950	Cannabis use, unspecified with psychotic disorder with delusions
F12.951	Cannabis use, unspecified with psychotic disorder with hallucinations
F12.959	Cannabis use, unspecified with psychotic disorder, unspecified
F12.980	Cannabis use, unspecified with anxiety disorder
F12.988	Cannabis use, unspecified with other cannabis-induced disorder
F12.99	Cannabis use, unspecified with unspecified cannabis-induced disorder
F13.10	Sedative, hypnotic or anxiolytic abuse, uncomplicated

F13.11	Sedative, hypnotic or anxiolytic abuse, in remission
F13.120	Sedative, hypnotic or anxiolytic abuse with intoxication, uncomplicated
F13.121	Sedative, hypnotic or anxiolytic abuse with intoxication delirium
F13.129	Sedative, hypnotic or anxiolytic abuse with intoxication, unspecified
F13.130	Sedative, hypnotic or anxiolytic abuse with withdrawal, uncomplicated
F13.131	Sedative, hypnotic or anxiolytic abuse with withdrawal delirium
F13.132	Sedative, hypnotic or anxiolytic abuse with withdrawal with perceptual disturbance
F13.139	Sedative, hypnotic or anxiolytic abuse with withdrawal, unspecified
F13.14	Sedative, hypnotic or anxiolytic abuse with sedative, hypnotic or anxiolytic-induced mood disorder
F13.150	Sedative, hypnotic or anxiolytic abuse with sedative, hypnotic or anxiolytic-induced psychotic disorder with delusions
F13.151	Sedative, hypnotic or anxiolytic abuse with sedative, hypnotic or anxiolytic-induced psychotic disorder with hallucinations
F13.159	Sedative, hypnotic or anxiolytic abuse with sedative, hypnotic or anxiolytic-induced psychotic disorder, unspecified
F13.180	Sedative, hypnotic or anxiolytic abuse with sedative, hypnotic or anxiolytic-induced anxiety disorder
F13.181	Sedative, hypnotic or anxiolytic abuse with sedative, hypnotic or anxiolytic-induced sexual dysfunction
F13.182	Sedative, hypnotic or anxiolytic abuse with sedative, hypnotic or anxiolytic-induced sleep disorder
F13.188	Sedative, hypnotic or anxiolytic abuse with other sedative, hypnotic or anxiolytic-induced disorder
F13.19	Sedative, hypnotic or anxiolytic abuse with unspecified sedative, hypnotic or anxiolytic-induced disorder
F13.20	Sedative, hypnotic or anxiolytic dependence, uncomplicated
F13.21	Sedative, hypnotic or anxiolytic dependence, in remission
F13.220	Sedative, hypnotic or anxiolytic dependence with intoxication, uncomplicated
F13.221	Sedative, hypnotic or anxiolytic dependence with intoxication delirium
F13.229	Sedative, hypnotic or anxiolytic dependence with intoxication, unspecified
F13.230	Sedative, hypnotic or anxiolytic dependence with withdrawal, uncomplicated
F13.231	Sedative, hypnotic or anxiolytic dependence with withdrawal delirium
F13.232	Sedative, hypnotic or anxiolytic dependence with withdrawal with perceptual disturbance
F13.239	Sedative, hypnotic or anxiolytic dependence with withdrawal, unspecified

F13.24	Sedative, hypnotic or anxiolytic dependence with sedative, hypnotic or anxiolytic-induced mood disorder
F13.250	Sedative, hypnotic or anxiolytic dependence with sedative, hypnotic or anxiolytic-induced psychotic disorder with delusions
F13.251	Sedative, hypnotic or anxiolytic dependence with sedative, hypnotic or anxiolytic-induced psychotic disorder with hallucinations
F13.259	Sedative, hypnotic or anxiolytic dependence with sedative, hypnotic or anxiolytic-induced psychotic disorder, unspecified
F13.26	Sedative, hypnotic or anxiolytic dependence with sedative, hypnotic or anxiolytic-induced persisting amnesic disorder
F13.27	Sedative, hypnotic or anxiolytic dependence with sedative, hypnotic or anxiolytic-induced persisting dementia
F13.280	Sedative, hypnotic or anxiolytic dependence with sedative, hypnotic or anxiolytic-induced anxiety disorder
F13.281	Sedative, hypnotic or anxiolytic dependence with sedative, hypnotic or anxiolytic-induced sexual dysfunction
F13.282	Sedative, hypnotic or anxiolytic dependence with sedative, hypnotic or anxiolytic-induced sleep disorder
F13.288	Sedative, hypnotic or anxiolytic dependence with other sedative, hypnotic or anxiolytic-induced disorder
F13.29	Sedative, hypnotic or anxiolytic dependence with unspecified sedative, hypnotic or anxiolytic-induced disorder
F13.90	Sedative, hypnotic, or anxiolytic use, unspecified, uncomplicated
F13.920	Sedative, hypnotic or anxiolytic use, unspecified with intoxication, uncomplicated
F13.921	Sedative, hypnotic or anxiolytic use, unspecified with intoxication delirium
F13.929	Sedative, hypnotic or anxiolytic use, unspecified with intoxication, unspecified
F13.930	Sedative, hypnotic or anxiolytic use, unspecified with withdrawal, uncomplicated
F13.931	Sedative, hypnotic or anxiolytic use, unspecified with withdrawal delirium
F13.932	Sedative, hypnotic or anxiolytic use, unspecified with withdrawal with perceptual disturbances
F13.939	Sedative, hypnotic or anxiolytic use, unspecified with withdrawal, unspecified
F13.94	Sedative, hypnotic or anxiolytic use, unspecified with sedative, hypnotic or anxiolytic-induced mood disorder
F13.950	Sedative, hypnotic or anxiolytic use, unspecified with sedative, hypnotic or anxiolytic-induced psychotic disorder with delusions
F13.951	Sedative, hypnotic or anxiolytic use, unspecified with sedative, hypnotic or anxiolytic-induced psychotic disorder with hallucinations

F13.959	Sedative, hypnotic or anxiolytic use, unspecified with sedative, hypnotic or anxiolytic-induced psychotic disorder, unspecified
F13.96	Sedative, hypnotic or anxiolytic use, unspecified with sedative, hypnotic or anxiolytic-induced persisting amnesic disorder
F13.97	Sedative, hypnotic or anxiolytic use, unspecified with sedative, hypnotic or anxiolytic-induced persisting dementia
F13.980	Sedative, hypnotic or anxiolytic use, unspecified with sedative, hypnotic or anxiolytic-induced anxiety disorder
F13.981	Sedative, hypnotic or anxiolytic use, unspecified with sedative, hypnotic or anxiolytic-induced sexual dysfunction
F13.982	Sedative, hypnotic or anxiolytic use, unspecified with sedative, hypnotic or anxiolytic-induced sleep disorder
F13.988	Sedative, hypnotic or anxiolytic use, unspecified with other sedative, hypnotic or anxiolytic-induced disorder
F13.99	Sedative, hypnotic or anxiolytic use, unspecified with unspecified sedative, hypnotic or anxiolytic-induced disorder
F14.10	Cocaine abuse, uncomplicated
F14.11	Cocaine abuse, in remission
F14.120	Cocaine abuse with intoxication, uncomplicated
F14.121	Cocaine abuse with intoxication with delirium
F14.122	Cocaine abuse with intoxication with perceptual disturbance
F14.129	Cocaine abuse with intoxication, unspecified
F14.13	Cocaine abuse, unspecified with withdrawal
F14.14	Cocaine abuse with cocaine-induced mood disorder
F14.150	Cocaine abuse with cocaine-induced psychotic disorder with delusions
F14.151	Cocaine abuse with cocaine-induced psychotic disorder with hallucinations
F14.159	Cocaine abuse with cocaine-induced psychotic disorder, unspecified
F14.180	Cocaine abuse with cocaine-induced anxiety disorder
F14.181	Cocaine abuse with cocaine-induced sexual dysfunction
F14.182	Cocaine abuse with cocaine-induced sleep disorder
F14.188	Cocaine abuse with other cocaine-induced disorder
F14.19	Cocaine abuse with unspecified cocaine-induced disorder
F14.20	Cocaine dependence, uncomplicated
F14.21	Cocaine dependence, in remission
F14.220	Cocaine dependence with intoxication, uncomplicated
F14.221	Cocaine dependence with intoxication delirium

F14.222	Cocaine dependence with intoxication with perceptual disturbance
F14.229	Cocaine dependence with intoxication, unspecified
F14.23	Cocaine dependence with withdrawal
F14.24	Cocaine dependence with cocaine-induced mood disorder
F14.250	Cocaine dependence with cocaine-induced psychotic disorder with delusions
F14.251	Cocaine dependence with cocaine-induced psychotic disorder with hallucinations
F14.259	Cocaine dependence with cocaine-induced psychotic disorder, unspecified
F14.280	Cocaine dependence with cocaine-induced anxiety disorder
F14.281	Cocaine dependence with cocaine-induced sexual dysfunction
F14.282	Cocaine dependence with cocaine-induced sleep disorder
F14.288	Cocaine dependence with other cocaine-induced disorder
F14.29	Cocaine dependence with unspecified cocaine-induced disorder
F14.90	Cocaine use, unspecified, uncomplicated
F14.920	Cocaine use, unspecified with intoxication, uncomplicated
F14.921	Cocaine use, unspecified with intoxication delirium
F14.922	Cocaine use, unspecified with intoxication with perceptual disturbance
F14.929	Cocaine use, unspecified with intoxication, unspecified
F14.93	Cocaine use, unspecified with withdrawal
F14.94	Cocaine use, unspecified with cocaine-induced mood disorder
F14.950	Cocaine use, unspecified with cocaine-induced psychotic disorder with delusions
F14.951	Cocaine use, unspecified with cocaine-induced psychotic disorder with hallucinations
F14.959	Cocaine use, unspecified with cocaine-induced psychotic disorder, unspecified
F14.980	Cocaine use, unspecified with cocaine-induced anxiety disorder
F14.981	Cocaine use, unspecified with cocaine-induced sexual dysfunction
F14.982	Cocaine use, unspecified with cocaine-induced sleep disorder
F14.988	Cocaine use, unspecified with other cocaine-induced disorder
F14.99	Cocaine use, unspecified with unspecified cocaine-induced disorder
F15.10	Other stimulant abuse, uncomplicated
F15.11	Other stimulant abuse, in remission
F15.120	Other stimulant abuse with intoxication, uncomplicated
F15.121	Other stimulant abuse with intoxication delirium

F15.122	Other stimulant abuse with intoxication with perceptual disturbance
F15.129	Other stimulant abuse with intoxication, unspecified
F15.13	Other stimulant abuse with withdrawal
F15.14	Other stimulant abuse with stimulant-induced mood disorder
F15.150	Other stimulant abuse with stimulant-induced psychotic disorder with delusions
F15.151	Other stimulant abuse with stimulant-induced psychotic disorder with hallucinations
F15.159	Other stimulant abuse with stimulant-induced psychotic disorder, unspecified
F15.180	Other stimulant abuse with stimulant-induced anxiety disorder
F15.181	Other stimulant abuse with stimulant-induced sexual dysfunction
F15.182	Other stimulant abuse with stimulant-induced sleep disorder
F15.188	Other stimulant abuse with other stimulant-induced disorder
F15.19	Other stimulant abuse with unspecified stimulant-induced disorder
F15.20	Other stimulant dependence, uncomplicated
F15.21	Other stimulant dependence, in remission
F15.220	Other stimulant dependence with intoxication, uncomplicated
F15.221	Other stimulant dependence with intoxication delirium
F15.222	Other stimulant dependence with intoxication with perceptual disturbance
F15.229	Other stimulant dependence with intoxication, unspecified
F15.23	Other stimulant dependence with withdrawal
F15.24	Other stimulant dependence with stimulant-induced mood disorder
F15.250	Other stimulant dependence with stimulant-induced psychotic disorder with delusions
F15.251	Other stimulant dependence with stimulant-induced psychotic disorder with hallucinations
F15.259	Other stimulant dependence with stimulant-induced psychotic disorder, unspecified
F15.280	Other stimulant dependence with stimulant-induced anxiety disorder
F15.281	Other stimulant dependence with stimulant-induced sexual dysfunction
F15.282	Other stimulant dependence with stimulant-induced sleep disorder
F15.288	Other stimulant dependence with other stimulant-induced disorder
F15.29	Other stimulant dependence with unspecified stimulant-induced disorder
F15.90	Other stimulant use, unspecified, uncomplicated
F15.920	Other stimulant use, unspecified with intoxication, uncomplicated



F15.921	Other stimulant use, unspecified with intoxication delirium
F15.922	Other stimulant use, unspecified with intoxication with perceptual disturbance
F15.929	Other stimulant use, unspecified with intoxication, unspecified
F15.93	Other stimulant use, unspecified with withdrawal
F15.94	Other stimulant use, unspecified with stimulant-induced mood disorder
F15.950	Other stimulant use, unspecified with stimulant-induced psychotic disorder with delusions
F15.951	Other stimulant use, unspecified with stimulant-induced psychotic disorder with hallucinations
F15.959	Other stimulant use, unspecified with stimulant-induced psychotic disorder, unspecified
F15.980	Other stimulant use, unspecified with stimulant-induced anxiety disorder
F15.981	Other stimulant use, unspecified with stimulant-induced sexual dysfunction
F15.982	Other stimulant use, unspecified with stimulant-induced sleep disorder
F15.988	Other stimulant use, unspecified with other stimulant-induced disorder
F15.99	Other stimulant use, unspecified with unspecified stimulant-induced disorder
F16.10	Hallucinogen abuse, uncomplicated
F16.11	Hallucinogen abuse, in remission
F16.120	Hallucinogen abuse with intoxication, uncomplicated
F16.121	Hallucinogen abuse with intoxication with delirium
F16.122	Hallucinogen abuse with intoxication with perceptual disturbance
F16.129	Hallucinogen abuse with intoxication, unspecified
F16.14	Hallucinogen abuse with hallucinogen-induced mood disorder
F16.150	Hallucinogen abuse with hallucinogen-induced psychotic disorder with delusions
F16.151	Hallucinogen abuse with hallucinogen-induced psychotic disorder with hallucinations
F16.159	Hallucinogen abuse with hallucinogen-induced psychotic disorder, unspecified
F16.180	Hallucinogen abuse with hallucinogen-induced anxiety disorder
F16.183	Hallucinogen abuse with hallucinogen persisting perception disorder (flashbacks)
F16.188	Hallucinogen abuse with other hallucinogen-induced disorder
F16.19	Hallucinogen abuse with unspecified hallucinogen-induced disorder
F16.20	Hallucinogen dependence, uncomplicated
F16.21	Hallucinogen dependence, in remission

F16.220	Hallucinogen dependence with intoxication, uncomplicated
F16.221	Hallucinogen dependence with intoxication with delirium
F16.229	Hallucinogen dependence with intoxication, unspecified
F16.24	Hallucinogen dependence with hallucinogen-induced mood disorder
F16.250	Hallucinogen dependence with hallucinogen-induced psychotic disorder with delusions
F16.251	Hallucinogen dependence with hallucinogen-induced psychotic disorder with hallucinations
F16.259	Hallucinogen dependence with hallucinogen-induced psychotic disorder, unspecified
F16.280	Hallucinogen dependence with hallucinogen-induced anxiety disorder
F16.283	Hallucinogen dependence with hallucinogen persisting perception disorder (flashbacks)
F16.288	Hallucinogen dependence with other hallucinogen-induced disorder
F16.29	Hallucinogen dependence with unspecified hallucinogen-induced disorder
F16.90	Hallucinogen use, unspecified, uncomplicated
F16.920	Hallucinogen use, unspecified with intoxication, uncomplicated
F16.921	Hallucinogen use, unspecified with intoxication with delirium
F16.929	Hallucinogen use, unspecified with intoxication, unspecified
F16.94	Hallucinogen use, unspecified with hallucinogen-induced mood disorder
F16.950	Hallucinogen use, unspecified with hallucinogen-induced psychotic disorder with delusions
F16.951	Hallucinogen use, unspecified with hallucinogen-induced psychotic disorder with hallucinations
F16.959	Hallucinogen use, unspecified with hallucinogen-induced psychotic disorder, unspecified
F16.980	Hallucinogen use, unspecified with hallucinogen-induced anxiety disorder
F16.983	Hallucinogen use, unspecified with hallucinogen persisting perception disorder (flashbacks)
F16.988	Hallucinogen use, unspecified with other hallucinogen-induced disorder
F16.99	Hallucinogen use, unspecified with unspecified hallucinogen-induced disorder
F17.200	Nicotine dependence, unspecified, uncomplicated
F17.201	Nicotine dependence, unspecified, in remission
F17.203	Nicotine dependence unspecified, with withdrawal
F17.208	Nicotine dependence, unspecified, with other nicotine-induced disorders
F17.209	Nicotine dependence, unspecified, with unspecified nicotine-induced disorders

F17.210	Nicotine dependence, cigarettes, uncomplicated
F17.211	Nicotine dependence, cigarettes, in remission
F17.213	Nicotine dependence, cigarettes, with withdrawal
F17.218	Nicotine dependence, cigarettes, with other nicotine-induced disorders
F17.219	Nicotine dependence, cigarettes, with unspecified nicotine-induced disorders
F17.220	Nicotine dependence, chewing tobacco, uncomplicated
F17.221	Nicotine dependence, chewing tobacco, in remission
F17.223	Nicotine dependence, chewing tobacco, with withdrawal
F17.228	Nicotine dependence, chewing tobacco, with other nicotine-induced disorders
F17.229	Nicotine dependence, chewing tobacco, with unspecified nicotine-induced disorders
F17.290	Nicotine dependence, other tobacco product, uncomplicated
F17.291	Nicotine dependence, other tobacco product, in remission
F17.293	Nicotine dependence, other tobacco product, with withdrawal
F17.298	Nicotine dependence, other tobacco product, with other nicotine-induced disorders
F17.299	Nicotine dependence, other tobacco product, with unspecified nicotine-induced disorders
F18.10	Inhalant abuse, uncomplicated
F18.11	Inhalant abuse, in remission
F18.120	Inhalant abuse with intoxication, uncomplicated
F18.121	Inhalant abuse with intoxication delirium
F18.129	Inhalant abuse with intoxication, unspecified
F18.14	Inhalant abuse with inhalant-induced mood disorder
F18.150	Inhalant abuse with inhalant-induced psychotic disorder with delusions
F18.151	Inhalant abuse with inhalant-induced psychotic disorder with hallucinations
F18.159	Inhalant abuse with inhalant-induced psychotic disorder, unspecified
F18.17	Inhalant abuse with inhalant-induced dementia
F18.180	Inhalant abuse with inhalant-induced anxiety disorder
F18.188	Inhalant abuse with other inhalant-induced disorder
F18.19	Inhalant abuse with unspecified inhalant-induced disorder
F18.20	Inhalant dependence, uncomplicated
F18.21	Inhalant dependence, in remission
F18.220	Inhalant dependence with intoxication, uncomplicated

F18.221	Inhalant dependence with intoxication delirium
F18.229	Inhalant dependence with intoxication, unspecified
F18.24	Inhalant dependence with inhalant-induced mood disorder
F18.250	Inhalant dependence with inhalant-induced psychotic disorder with delusions
F18.251	Inhalant dependence with inhalant-induced psychotic disorder with hallucinations
F18.259	Inhalant dependence with inhalant-induced psychotic disorder, unspecified
F18.27	Inhalant dependence with inhalant-induced dementia
F18.280	Inhalant dependence with inhalant-induced anxiety disorder
F18.288	Inhalant dependence with other inhalant-induced disorder
F18.29	Inhalant dependence with unspecified inhalant-induced disorder
F18.90	Inhalant use, unspecified, uncomplicated
F18.920	Inhalant use, unspecified with intoxication, uncomplicated
F18.921	Inhalant use, unspecified with intoxication with delirium
F18.929	Inhalant use, unspecified with intoxication, unspecified
F18.94	Inhalant use, unspecified with inhalant-induced mood disorder
F18.950	Inhalant use, unspecified with inhalant-induced psychotic disorder with delusions
F18.951	Inhalant use, unspecified with inhalant-induced psychotic disorder with hallucinations
F18.959	Inhalant use, unspecified with inhalant-induced psychotic disorder, unspecified
F18.97	Inhalant use, unspecified with inhalant-induced persisting dementia
F18.980	Inhalant use, unspecified with inhalant-induced anxiety disorder
F18.988	Inhalant use, unspecified with other inhalant-induced disorder
F18.99	Inhalant use, unspecified with unspecified inhalant-induced disorder
F19.10	Other psychoactive substance abuse, uncomplicated
F19.11	Other psychoactive substance abuse, in remission
F19.120	Other psychoactive substance abuse with intoxication, uncomplicated
F19.121	Other psychoactive substance abuse with intoxication delirium
F19.122	Other psychoactive substance abuse with intoxication with perceptual disturbances
F19.129	Other psychoactive substance abuse with intoxication, unspecified
F19.130	Other psychoactive substance abuse with withdrawal, uncomplicated
F19.131	Other psychoactive substance abuse with withdrawal delirium

F19.132	Other psychoactive substance abuse with withdrawal with perceptual disturbance
F19.139	Other psychoactive substance abuse with withdrawal, unspecified
F19.14	Other psychoactive substance abuse with psychoactive substance-induced mood disorder
F19.150	Other psychoactive substance abuse with psychoactive substance-induced psychotic disorder with delusions
F19.151	Other psychoactive substance abuse with psychoactive substance-induced psychotic disorder with hallucinations
F19.159	Other psychoactive substance abuse with psychoactive substance-induced psychotic disorder, unspecified
F19.16	Other psychoactive substance abuse with psychoactive substance-induced persisting amnesic disorder
F19.17	Other psychoactive substance abuse with psychoactive substance-induced persisting dementia
F19.180	Other psychoactive substance abuse with psychoactive substance-induced anxiety disorder
F19.181	Other psychoactive substance abuse with psychoactive substance-induced sexual dysfunction
F19.182	Other psychoactive substance abuse with psychoactive substance-induced sleep disorder
F19.188	Other psychoactive substance abuse with other psychoactive substance-induced disorder
F19.19	Other psychoactive substance abuse with unspecified psychoactive substance-induced disorder
F19.20	Other psychoactive substance dependence, uncomplicated
F19.21	Other psychoactive substance dependence, in remission
F19.220	Other psychoactive substance dependence with intoxication, uncomplicated
F19.221	Other psychoactive substance dependence with intoxication delirium
F19.222	Other psychoactive substance dependence with intoxication with perceptual disturbance
F19.229	Other psychoactive substance dependence with intoxication, unspecified
F19.230	Other psychoactive substance dependence with withdrawal, uncomplicated
F19.231	Other psychoactive substance dependence with withdrawal delirium
F19.232	Other psychoactive substance dependence with withdrawal with perceptual disturbance
F19.239	Other psychoactive substance dependence with withdrawal, unspecified

F19.24	Other psychoactive substance dependence with psychoactive substance-induced mood disorder
F19.250	Other psychoactive substance dependence with psychoactive substance-induced psychotic disorder with delusions
F19.251	Other psychoactive substance dependence with psychoactive substance-induced psychotic disorder with hallucinations
F19.259	Other psychoactive substance dependence with psychoactive substance-induced psychotic disorder, unspecified
F19.26	Other psychoactive substance dependence with psychoactive substance-induced persisting amnesic disorder
F19.27	Other psychoactive substance dependence with psychoactive substance-induced persisting dementia
F19.280	Other psychoactive substance dependence with psychoactive substance-induced anxiety disorder
F19.281	Other psychoactive substance dependence with psychoactive substance-induced sexual dysfunction
F19.282	Other psychoactive substance dependence with psychoactive substance-induced sleep disorder
F19.288	Other psychoactive substance dependence with other psychoactive substance-induced disorder
F19.29	Other psychoactive substance dependence with unspecified psychoactive substance-induced disorder
F19.90	Other psychoactive substance use, unspecified, uncomplicated
F19.920	Other psychoactive substance use, unspecified with intoxication, uncomplicated
F19.921	Other psychoactive substance use, unspecified with intoxication with delirium
F19.922	Other psychoactive substance use, unspecified with intoxication with perceptual disturbance
F19.929	Other psychoactive substance use, unspecified with intoxication, unspecified
F19.930	Other psychoactive substance use, unspecified with withdrawal, uncomplicated
F19.931	Other psychoactive substance use, unspecified with withdrawal delirium
F19.932	Other psychoactive substance use, unspecified with withdrawal with perceptual disturbance
F19.939	Other psychoactive substance use, unspecified with withdrawal, unspecified
F19.94	Other psychoactive substance use, unspecified with psychoactive substance-induced mood disorder
F19.950	Other psychoactive substance use, unspecified with psychoactive substance-induced psychotic disorder with delusions

F19.951	Other psychoactive substance use, unspecified with psychoactive substance-induced psychotic disorder with hallucinations
F19.959	Other psychoactive substance use, unspecified with psychoactive substance-induced psychotic disorder, unspecified
F19.96	Other psychoactive substance use, unspecified with psychoactive substance-induced persisting amnesic disorder
F19.97	Other psychoactive substance use, unspecified with psychoactive substance-induced persisting dementia
F19.980	Other psychoactive substance use, unspecified with psychoactive substance-induced anxiety disorder
F19.981	Other psychoactive substance use, unspecified with psychoactive substance-induced sexual dysfunction
F19.982	Other psychoactive substance use, unspecified with psychoactive substance-induced sleep disorder
F19.988	Other psychoactive substance use, unspecified with other psychoactive substance-induced disorder
F19.99	Other psychoactive substance use, unspecified with unspecified psychoactive substance-induced disorder

## 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
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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.

## Recodes

### Map Medi-Cal to Coverage Plans

1. XCAMedical
  - a. This is used to tie a coverage plan to Medi-Cal in reference to initializing the CIN.
    - i. Find the list of Medi-Cal coverage plans and their CoveragePlanId from either the UI in the information icon or the CoveragePlans table. You will need this ID for the steps below
    - ii. Open Recodes screen
    - iii. Select Recode Category Name from Category dropdown (you can type search)
      1. Select a value and select 'Clear'
      2. Repeat the following steps for each coverage plan that is considered a Medi-Cal coverage plan
        - a. Enter name of recode (usually same as Coverage Plan name for this scenario)
        - b. Enter Start Date
          - i. Must be equal to or prior to today's date
        - c. Enter Integer ID
          - i. This is the Coverage Plan ID from the list you obtained above.
        - d. Select Insert
      3. Save once you have finished inserting all coverage plans.