CaliforniaTEDS in SmartCare

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Overview

This user guide is meant for internal Streamline staff use. For customers, this information will be added to the state specific user guides which use the Core TEDS functionality.

TEDS stands for Treatment Episode Data Set. This is a set of data collected per client for the purpose of reporting data to the state. The Treatment Episode Data Set defines the data set by each episode of care for a client. The data generally constitutes demographic and assessment type information. Each state will have their own definition of what constitutes an Episode that is submitted to the state. Some states require one episode of treatment at a time. Other states require multiple episodes of treatment if a client is receiving different types of reportable services.

The purpose of the Core TEDS screens is to separate the ability to define the state reportable episodes of care and then to be able to connect the reported data to the correct state reportable episode of care. So the screens in this user guide will be incorporated into State Reporting processes, and thus customer facing documentation would be an inclusion of this information PLUS the state specific requirements linked to the TEDS screens.

System Setup

In order to set up the Core TEDS the following steps are taken:

1. Configuration Key

Set the System Configuration key ‘SetTedsServiceType’ to either “Program’ or ‘Procedure Code’

1. When the value of the key is set to "Program", the system uses the Program that is selected in the "Program Assignment" screen to determine the Service Type. The mapping of Program to Service Type is available in the table "TEDSEpisodePrograms". The Program and Service Type information will be inserted/updated into the table "TEDSEpisodeServiceTypes".
2. When the value of the key is set to "Procedure", the system uses the Procedure Code that is selected in the "Service Notes" or "Service Details" screen to determine the Service Type. The mapping of Procedure Code to Service Type is available in the table "TEDSEpisodeProcedureCodes". The Procedure Code and Service Type information will be inserted/updated into the table "TEDSEpisodeServiceTypes".

For California customers this will be set to “Program”.

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Set the System Configuration key 'Allow Multiple TedsEpisodes'

1. When the value of the key is set to "Yes", the system will allow multiple TEDS Episodes to be open and active at a given time.
2. When the value of the key is set to "No", the system will only allow one TEDS Episode to be open and active at a given time.

For California customers this will more often than not be set to "Yes" to allow both a CSI and CalOMS Episodes to be open simultaneously. Additionally this would allow new programs or providers to open their episodes timely even if a recently discharged episode has not discharged their TEDS Episode in a timely fashion. Certain customers may have a need to set this key to "No", if you are unsure consult with your implementation team.

Set the System Configuration key 'AllowMultipleTedsServiceType'

1. When the value of the key is set to "Yes", the system will allow more than one TEDS Episode of the same Episode Type and different Service Types to be open and active at a given time.
2. When the value of the key is set to "No", the system will allow only one TEDS Episode of a given Episode Type to be open and active at a given time.

For California customers this will vary depending on the customer's workflow needs.

3. Global Code Set Up

Set up the Global Code category for TEDS Episodes. The TEDS Episode represents the unique episodes of care which can be submitted to the state. These will be defined for each state by the DACS Product Manager. The category name is 'EpisodeToSubmit'.

1. Open the Global Codes screen in Administration.
2. Search for the category named 'EpisodeToSubmit'
3. Click on one of the rows of data to update the Global Code Names.
4. In the Details screen, set the Episodes applicable for the customer and their provided services. This will vary depending on the type of customer and should be discussed with the DACS Product Manager prior to setting up the values.
    a. For Episodes that will report CSI data, set the Code field to MH
    b. For Episodes that will report CalOMS data, set the Code to SUD.
5. Click Save on the screen to save the details.

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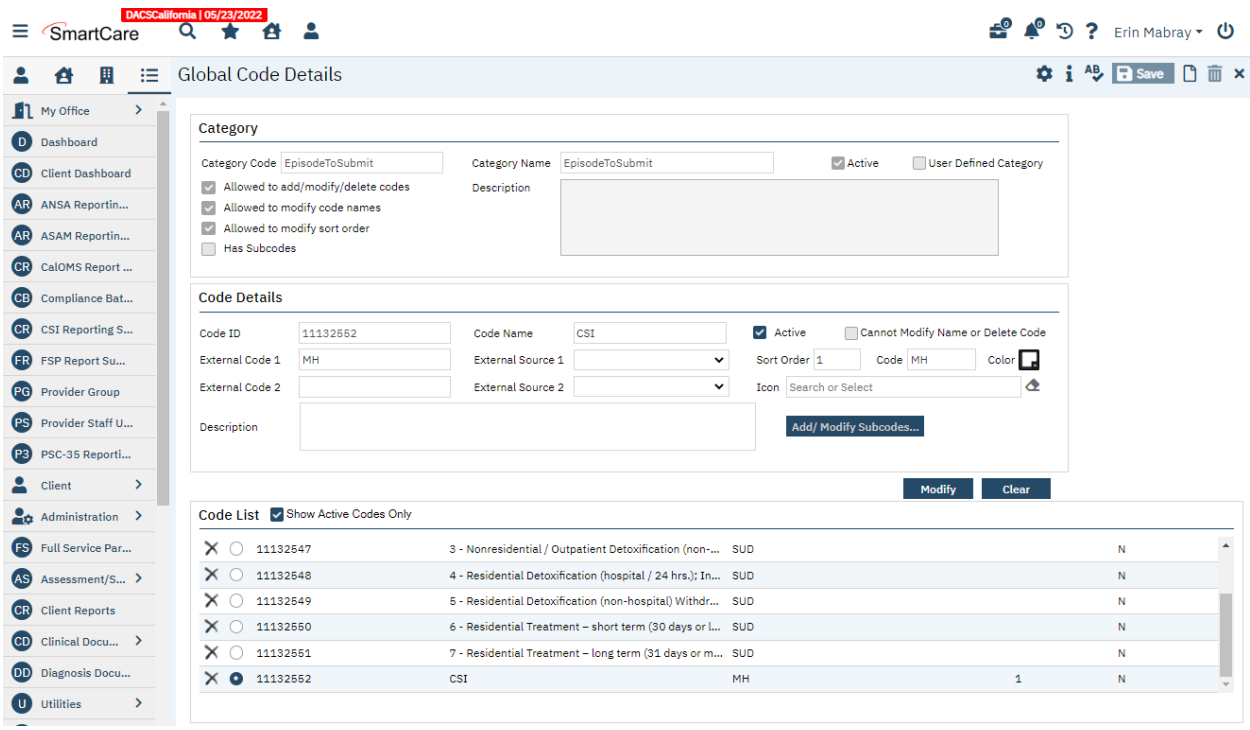

Set up the Global Code Category for TEDS Service Types. The definition of the Service Type is the different tracks or types of services that are reported underneath an Episode. The set up for these Service Types will vary by customer. The Category name is 'ServiceTypes'.

1. Open the Global Codes screen in Administration.
2. Search for the category named 'ServiceTypes'
3. Click on one of the rows of data to update the Global Code Names. You will enter all possible service types across all episode types. The mapping will be done later for linking a Service Type to an Episode.
4. In the Details screen, set the Episodes applicable for the state. .
    a. Click Save on the screen to save the details.

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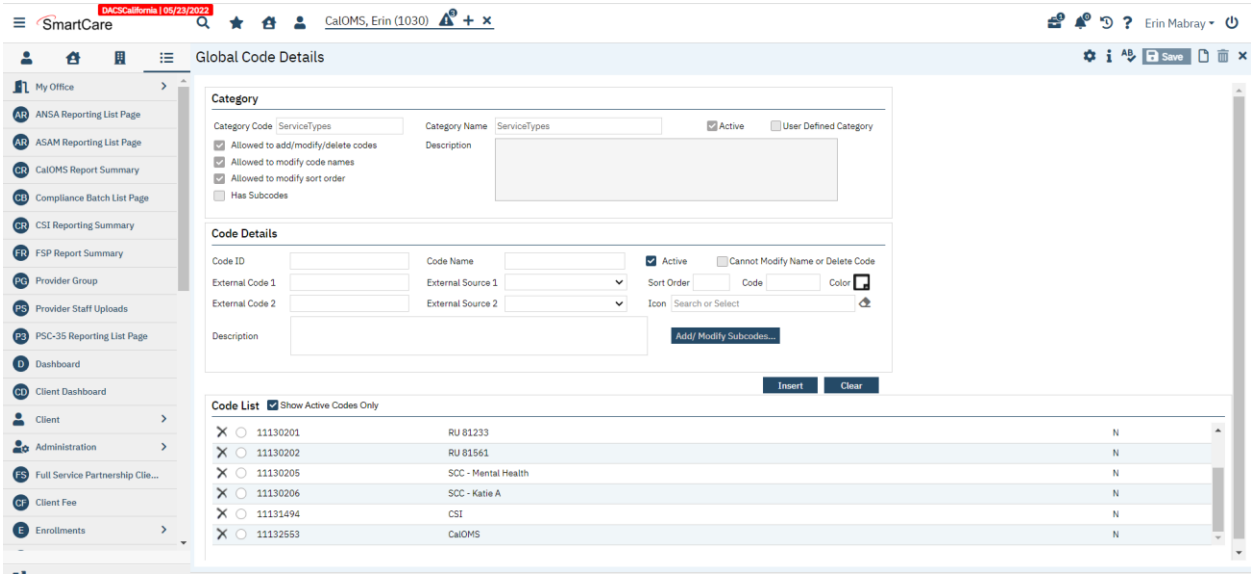

4. Role Definition and Permissions

Set the Role Definition for the applicable roles and what screens for the TEDS they should be able to access. There are the following Banners/Screens:

1. TEDS Setup List = The screen in Administration used to configure the TEDS Episodes and the related set up.
2. TEDS Setup Details = The details screen in Administration used to configure the TEDS Episodes and the related set up
3. TEDS Tracking List = The screen in the Client record which shows the assigned TEDS episodes.
4. TEDS Episode Details = The screen in the Client record which shows the selected TEDS episode specific details.

Be sure the logged in user who will be setting up the TEDS Episode information has permission to the role which has the permissions set.

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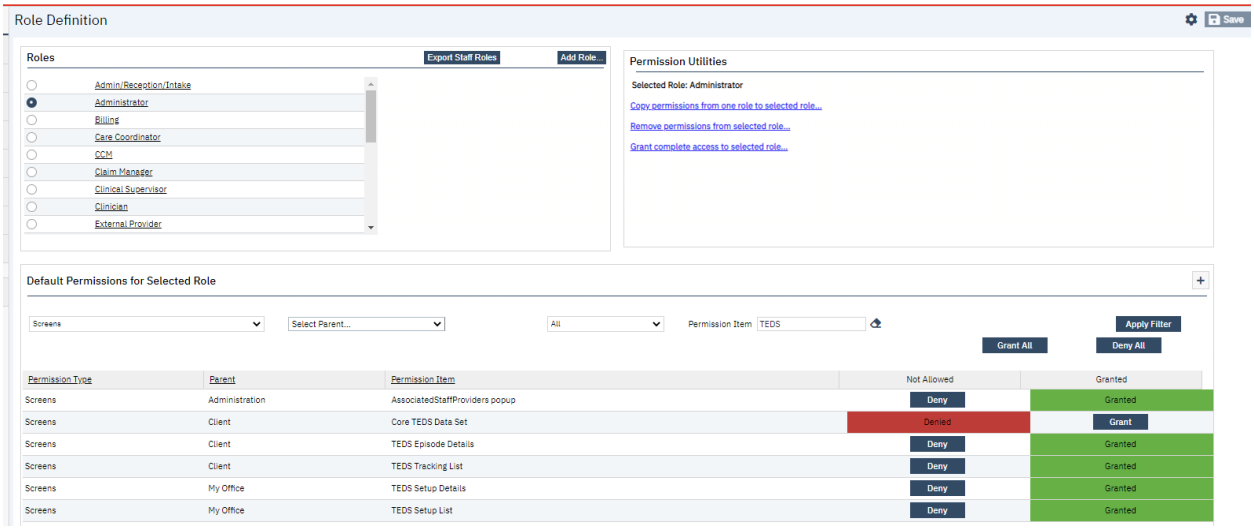


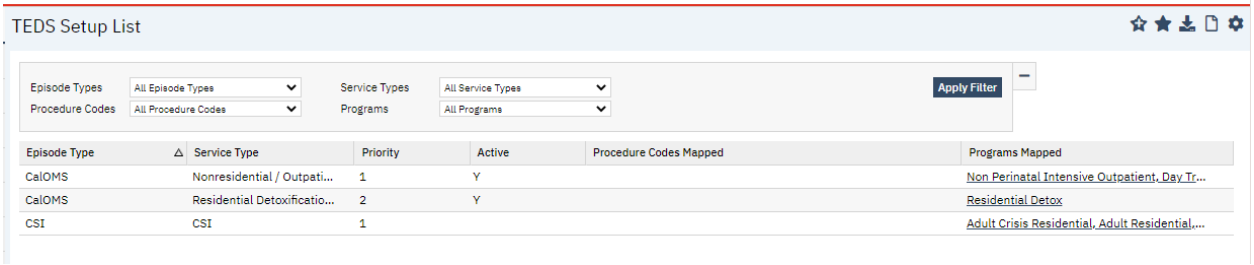
Teds Setup List

This screen is used to map the TEDS Episodes set up in the Global Codes to the Service Types. The purpose of this list page is to do the following:

1. Establish the Episodes that can be reported
2. Link each episode to one or more Service Types
3. Link each Episode/Service Type combination to one or more Programs or Procedure Codes to determine when an episode should be created.

To setup a TEDS Episode do the following:

1. From the TEDS Setup List Screen, click the New tool in the toolbar.



2. In the Details page:
    a. Choose the Episode
    b. Choose the Service Type you want to map the Episode to
    c. Set the Priority. Priority means, if the client has more than one Service Type for the Episode, which one takes priority if needed in the State Reporting. The Priority of 1 is the highest priority.

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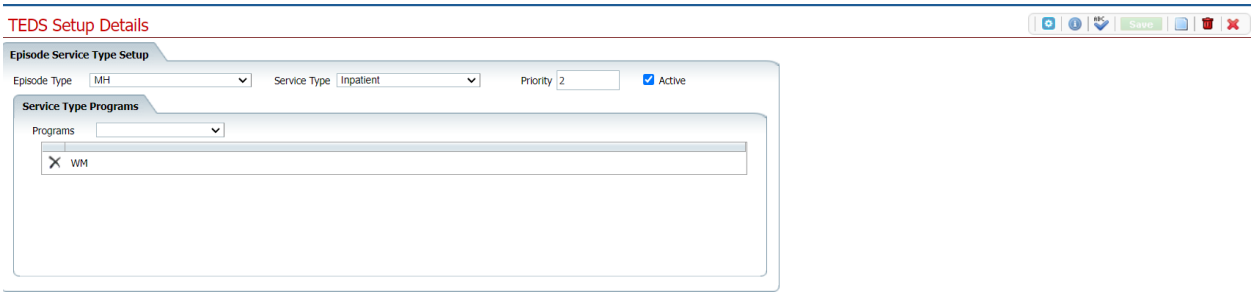
d. Set the Active checkbox as checked.
e. Based on the Configuration Key, you will either see the Program or Procedure Code setup. Choose the Program or Procedure Code name you want to map to the Episode and Service Combination. By mapping this Program or Procedure Code, you are telling the system which Programs or which Procedure Codes for this organization will be used to create the Episode and Service types in the Client record.
    i. Rules for setup:
        1. Multiple Programs or multiple Procedure Codes can map to 1 TEDS Episode Type.
        2. You cannot map one Program or one Procedure Code to
f. Click Save on the Screen.
g. To begin to enter another Service Type for the Episode, or set up a another Episode/Sertice Type combination, click the New Tool.



At the end of the setup of the TEDS Setup, there should be a list of all the Episode and Service Type combinations. And for each combination, all Programs which indicate the Treatment and Service Type should begin would be mapped.

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Version Control

Revision Date	Description	Updated By
12/20/2022	Update EpisodeToSubmit set up to include MH or SUD Code	EMabray

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