

# CaliforniaTEDS in SmartCare

Version 5.0  
7.1.24

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## Overview

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

### Configuration Key

Set the System Configuration key 'SetTedsServiceType' to either "Program" or "Procedure Code"

- For California customers this will be set to "Program".
  - 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".
  - 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".

Set the System Configuration key 'Allow Multiple TedsEpisodes'

- 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.
- 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”. At this time there are no known use cases amongst existing California customers, if you are unsure consult with your implementation team.

Set the System Configuration key ‘AllowMultipleTedsServiceType’

- 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.
- 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. For examples, please reference [TEDS Set Up Examples](#).

## Recode Set Up

Set the Recode Category ‘XCATEDSEpisodeStartDate’. This category is used to set the date in which the system will recognize the starting date to include Program Assignments in the TEDS Episode creation. When this recode is set, Programs that are mapped to a TEDS Episode Type and have Discharge Date occurring prior to the recode value will be excluded from the TEDS Episode logic.

If no value is provided TEDS Episode will be generated for all Program Assignments mapped to TEDS Episode Types.

To set the Recode a From Date and Character Code Id are required. The From Date is considered the Recode Active Date and when the logic will begin to be triggered in the system. The Character Code Id is the date the system will use as the TEDS go live date. Enrollments with discharges prior to this date will be considered for the exclusion logic.

## Recode Detail

### Recodes

Category	
Category Code	XCATEDSEpisodesGoLiveDate
Category Name	XCATEDSEpisodesGoLiveDate
Mapping Entity	TEDSEpisodes.DischargeDate
Description	This record category is used to set the recode Character Code Id in which the system will recognize that the counties go live date and prevent them from created unwanted TEDS Episodes for the counties. The Date form for this recode is MM/DD/YYYY.

### Recode Details

Code Name	<input type="text"/>
Start Date	<input type="text"/>
End Date	<input type="text"/>
Character Code Id	<input type="text"/>
Integer Code Id	<input type="text"/>

### Recode List

	Code Name	From Date	To Date	Character Code Id	Integer Code Id
<input checked="" type="checkbox"/>	XCATEDSEpisodesGoLiveDate	04/17/2024		04/17/2024	

## Global Code Set Up

### Episode Types

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 by the customer based on the business and workflow needs. 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 External Code 1 field to MH
  - b. For Episodes that will report CalOMS data, set the External Code1 to SUD.
5. Click Save on the screen to save the details.

SmartCare DMSCalifornia | 05/23/2022 Erin Mabray

### Global Code Details

- My Office
- Dashboard
- Client Dashboard
- ANSA Reportin...
- ASAM Reportin...
- CalOMS Report ...
- Compliance Bat...
- CSI Reporting S...
- FSP Report Su...
- Provider Group
- Provider Staff U...
- PSC-35 Reporti...
- Client
- Administration
- Full Service Par...
- Assessment/S...
- Client Reports
- Clinical Docu...
- Diagnosis Docu...
- Utilities

#### Category

Category Code:  Category Name:   Active  User Defined Category

Allowed to add/modify/delete codes  
 Allowed to modify code names  
 Allowed to modify sort order  
 Has Subcodes

Description:

#### Code Details

Code ID:  Code Name:   Active  Cannot Modify Name or Delete Code

External Code 1:  External Source 1:  Sort Order:  Code:  Color:

External Code 2:  External Source 2:  Icon:

Description:

[Add/Modify Subcodes...](#)

[Modify](#) [Clear](#)

#### Code List Show Active Codes Only

<input checked="" type="checkbox"/>	<input type="checkbox"/>	11132547	3 - Nonresidential / Outpatient Detoxification (non-...	SUD		N
<input checked="" type="checkbox"/>	<input type="checkbox"/>	11132548	4 - Residential Detoxification (hospital / 24 hrs.); In...	SUD		N
<input checked="" type="checkbox"/>	<input type="checkbox"/>	11132549	5 - Residential Detoxification (non-hospital) Withdr...	SUD		N
<input checked="" type="checkbox"/>	<input type="checkbox"/>	11132550	6 - Residential Treatment - short term (30 days or L...	SUD		N
<input checked="" type="checkbox"/>	<input type="checkbox"/>	11132551	7 - Residential Treatment - long term (31 days or m...	SUD		N
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11132552	CSI	MH	1	N

## Considerations

Customers reporting both CSI and CalOMS may take different approaches when setting up the EpisodeToSubmit codes between the two different reporting types. For examples, please reference [TEDS Set Up Examples](#).

### CSI

CSI records are not truly episodic, meaning data is reported to the state for a particular client and not tied to a particular episode. Therefore may be set up as one Episode Type unless otherwise required by a customer's business needs.

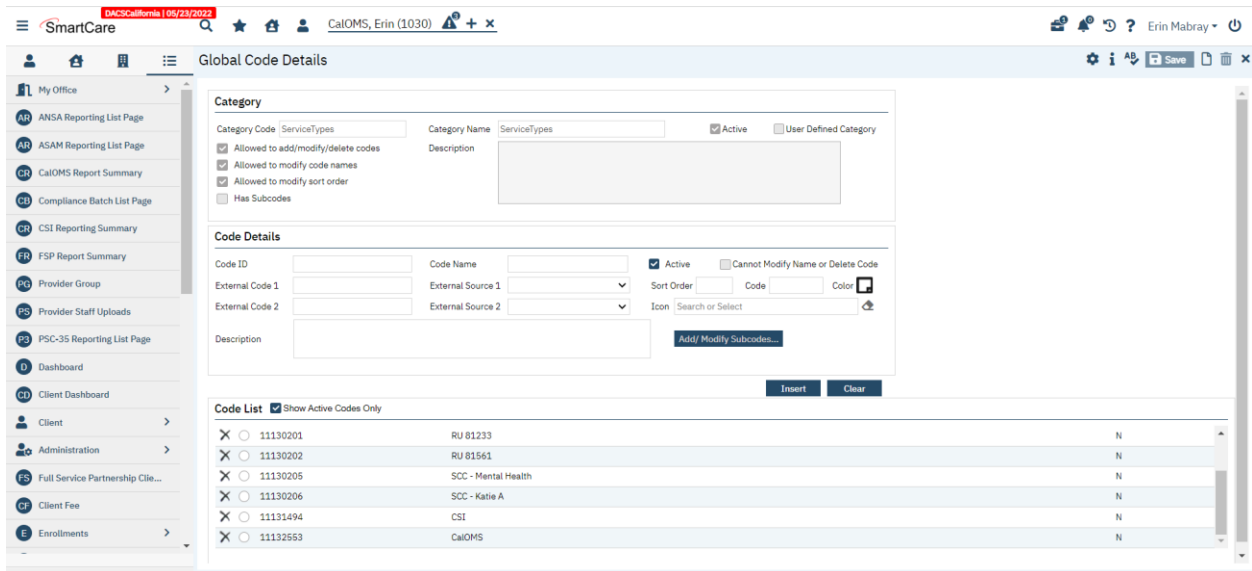
### CalOMS

CalOMS records must be reported within their specific episode which is identified with a unique id, the Form Serial Number (FSN). The FSN is either migrated to, generated by and manually entered into the TEDS Episode Details > Episode Number field. This field is episode specific. Meaning that for any instance where a client may have two CalOMS episodes open simultaneously and those episodes must have their own unique FSN, those would need to be two distinct episode types. In the simplest of terms, any Program that would require a unique FSN per each client enrollment would need to be its own Episode Type

## Service Types

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.



Code ID	Code Name	Status
11130201	RU 81233	N
11130202	RU 81561	N
11130205	SCC - Mental Health	N
11130206	SCC - Katie A	N
11131494	CSI	N
11132553	CalOMS	N

## Considerations

Customers reporting both CSI and CalOMS may take different approaches when setting up the ServiceTypes codes between the two different reporting types.

### CSI

CSI records are service type specific and therefore may be set up as one ServiceType unless otherwise required by a customer's business needs.

### CalOMS

CalOMS records report their state allowed CalOMS Type of Treatment Service based on the Program. Since the file is not looking at the TEDS Set Up for file field level data, customers may choose to set up one CalOMS TEDS Service Type or multiple. This is based on customer preference.

## Set Up Example and Use Cases

When deciding how to set up EpisodeToSubmit for the CalOMS episode type there are 3 currently recommended approaches. These 3 potential set up configurations are summarized below, additional details and mock data can be found in the [TEDS Set Up Examples](#) workbook. Please note that this is not comprehensive of all potential scenarios but are the ones currently known and used by current customers. If these options do not meet customer needs then consultation with Implementation and DACS should be scheduled.

### EpisodeToSubmit : CalOMS Service Type

For this setup configuration the TEDS EpisodeToSubmit (Episode Type) is equal to the CalOMS Type of Treatment Service. Each Program within the CalOMS Type of Treatment Service is mapped to the same Episode Type. This will result in one FSN if a client is enrolled to two Program within the same CalOMS Type of Treatment Service simultaneously.

### EpisodeToSubmit : Program

For this setup configuration the TEDS EpisodeToSubmit (Episode Type) is equal to the CalOMS Program. Each Program is mapped 1:1 with an Episode Type. This will result in a unique FSN for every enrollment to a CalOMS program.

### EpisodeToSubmit : Provider:CalOMS Service Type

For this setup configuration the TEDS EpisodeToSubmit (Episode Type) is equal to the Provider and CalOMS Type of Treatment Service combination. For each CalOMS Type of Treatment Service a Provider has programs in which a TEDS Episode Type exists. This will result in any enrollment to programs within the same provider organization being assigned the same FSN

## 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.



Role Definition Save

**Roles** Export Staff Roles Add Role

- Admin/Reception/Intake
- Administrator
- Billing
- Care Coordinator
- CCM
- Claims Manager
- Clinical Supervisor
- Clinician
- External Provider

**Permission Utilities**

Selected Role: Administrator

[Copy permissions from one role to selected role...](#)

[Remove permissions from selected role...](#)

[Grant complete access to selected role...](#)

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**Default Permissions for Selected Role** +

Screens  All  TEDS

Permission Type	Parent	Permission Item	Not Allowed	Granted
Screens	Administration	AssociatedStaffProviders popup	<input type="button" value="Deny"/>	<input type="button" value="Granted"/>
Screens	Client	Core TEDS Data Set	<input type="button" value="Denied"/>	<input type="button" value="Grant"/>
Screens	Client	TEDS Episode Details	<input type="button" value="Deny"/>	<input type="button" value="Granted"/>
Screens	Client	TEDS Tracking List	<input type="button" value="Deny"/>	<input type="button" value="Granted"/>
Screens	My Office	TEDS Setup Details	<input type="button" value="Deny"/>	<input type="button" value="Granted"/>
Screens	My Office	TEDS Setup List	<input type="button" value="Deny"/>	<input type="button" value="Granted"/>

## 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.

TEDS Setup List Star Download Print Settings

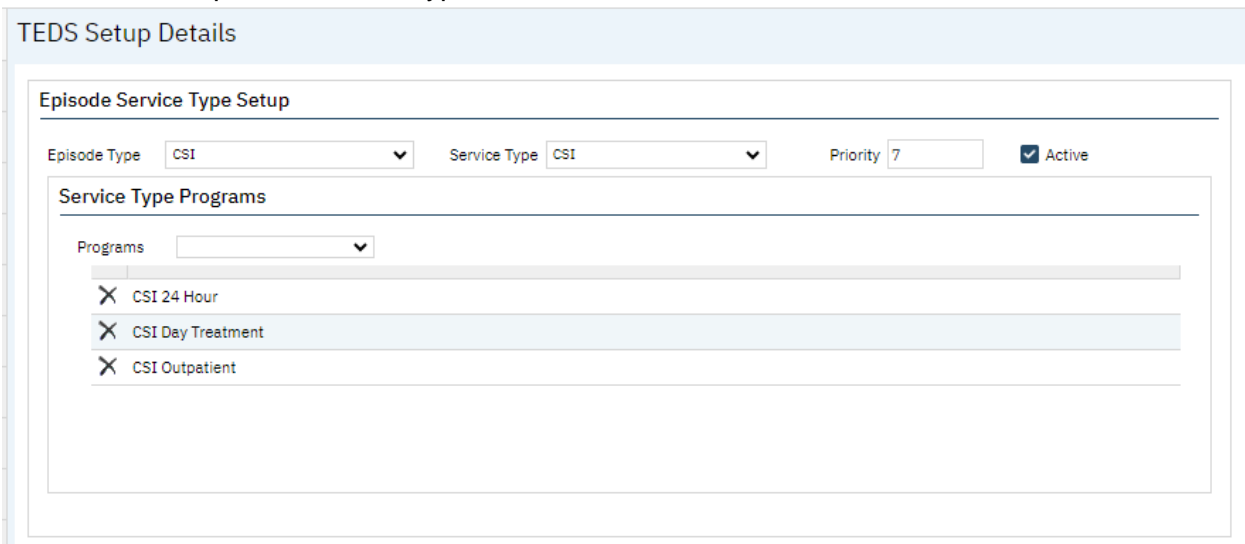
Episode Types  Service Types

Procedure Codes  Programs

Episode Type	Service Type	Priority	Active	Procedure Codes Mapped	Programs Mapped
CalOMS	Nonresidential / Outpati...	1	Y		<a href="#">Non Perinatal Intensive Outpatient, Day Tr...</a>
CalOMS	Residential Detoxificatio...	2	Y		<a href="#">Residential Detox</a>
CSI	CSI	1			<a href="#">Adult Crisis Residential, Adult Residential...</a>

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.
  - 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 more than one Episode Type.
- f. Click Save on the Screen.
- g. To begin to enter another Service Type for the Episode, or set up a another Episode/Service 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.

## Common Troubleshooting Questions

I am not seeing a TEDS Episode Created for a Client who I enrolled in a program. Why?

Check the following areas of SmartCare when trying to understand why a TEDS Episode isn't created when you think it should be:

1. In the TEDS Setup List page, filter for the Program the client was enrolled in to confirm the program is mapped to a TEDS Episode with the Active checkbox checked. Also make sure that program is not mapped to more than one TEDS Episode and Service Type combination.
2. In the Recode Category, XCATEDSEpisodesGoLiveDate, confirm the date set in the Start Date field and Character field are before the Enrolled date of the Client's program. If the Client's Program Details → Enrollment Date field is before the date set in the Recode Category, this is why the client's TEDS Episode is not being created.
3. Is the Client already enrolled in the same TEDS episode? For the mapping checked in step 1, is more than one program mapped to the Episode Type you expect the client to have? If so, and the client is already enrolled in another program in the mapping, the client may already have the Episode Type in the Client TEDS Episode list page, so the system will not create a second one.

## Version Control

Revision Date	Description	Updated By
12/20/2022	Update EpisodeToSubmit set up to include MH or SUD Code	EMabray
12/12/2023	Added section to detail set up considerations and examples	EMabray
1/23/24	Added updates to reference example documentation	EMabray
5/21/24	Added Recode Set Up	EMabray
7/1/24	Add Common Troubleshooting Questions	KMorrow