

CSI Assessment Form (Timely Access): Key Definitions

Referral Information	A new client who needs to be tracked for Timely Access is a Medi-Cal beneficiary who is requesting outpatient specialty mental health services (SMHS) and is currently not open to any BHRS Medi-Cal program (includes CBOs).	
	Date of First Contact to Request Services	The date the client, client representative (someone legally authorized to consent for services for the client, e.g. parent of minor), or a provider (if the client is aware of the referral) requests mental health services for the client.
	Urgent	An urgent appointment means that it has been determined that taking the standard time to provide an appointment could seriously jeopardize the beneficiary’s life, physical or mental health or ability to attain, maintain, or regain maximum functioning. <ul style="list-style-type: none"> If another provider indicates an appointment is urgent, consider it urgent. If a client says their request is urgent, BHRS/CBO should assess their need and make a determination of whether or not an appointment is urgently needed. This assessment should be documented in the client’s chart.
Assessment Phase	Assessment appointments that count toward the Timely Access requirement are assessment appointments which involve gathering assessment information directly from the client or the client representative (someone legally authorized to consent for services for the client, e.g. parent of minor).	
	Assessment Appt Offer Dates	You can record up to three offer dates for the initial assessment appointment. The offered appointment dates should be within Timely Access standards. Second and Third offers only need to be made if the client did not accept the previous offer(s).
	Assessment Appt Accepted Date	This is the appointment offer date that the client or their representative accepts. This must be the same date as the first offer date if no second or third offer; or the same date as the second offer date if no third offer. Can be later than or same date as third offer.
	Assessment Start Date	The date the client attends their initial Assessment appointment. This must be the same date as or later than the Assessment Appointment Accepted Date.
	Assessment End Date	The date that you make a determination of medical necessity and finalize the full assessment.
Treatment Phase	Treatment Appointment that counts toward the Timely Access requirement includes Crisis Intervention, Mental Health Services (Individual Therapy, Rehab, etc.), Case Management type services, Medication Support Services.* “Plan Development” does <u>not</u> count as a Treatment appointment. Remember, “Planned services” are provided AFTER both the assessment and treatment plan are finalized.	
	*Note: The treatment service must involve direct contact with the client or guardian. For medication support services, the service should involve the prescriber and the client/guardian.	
	Treatment Appt Offer Dates	You can record up to three offer dates for the initial treatment appointment. The offered appointment dates should be within Timely Access standards. Second and Third offers only need to be made if the client did not accept the previous offer(s).
	Treatment Appt Accepted Date	This is the appointment offer date that the client or their representative accepts. This must be the same date as the first offer date if no second or third offer; or the same date as the second offer date if no third offer. Can be later than or same date as third offer.
	Treatment Start Date	This is the date that the client attends their initial Treatment appointment. This date marks <u>the end of Timely Access tracking</u> . This date must be same date as or later than the Treatment Appointment Accepted Date.
Closing	Referred To	Where client was referred to if referred out. Required only if client did NOT meet medical necessity for SMI/SED services. Otherwise, leave blank.
	Closed Out Date	Only fill this out if the client was discharged and <u>DID NOT attend</u> their first treatment appointment. The discharge date would be the Closed Out Date and <u>the end of Timely Access tracking</u> . A Closure Reason must be selected in order to submit a Closed Out Date.