Timely Access forms Quick Guide

General Instructions for the CSI Assessment form and Client Alerts

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Creating or Editing a CSI Assessment form

To find the form, type “CSI Assessment” into the “Search Forms” box in Avatar. Select the episode in which you will create the form.

- If the client has never had a CSI Assessment form started in the selected episode, then it will automatically open a blank form when you click on “CSI Assessment”
- If the client has had a CSI Assessment form started/completed in the past in the episode you selected, then you will see a screen listing all of the past and current CSI Assessment forms for that client that had been created in that episode.

- If the list of the client’s current/past Timeliness forms pops up, you will see edit options on the bottom left corner of the screen.
  - Click “Add” to add a new CSI Assessment form if the client does not already have one created for the current request.
  - Click “Edit” to edit an existing CSI Assessment form if a CSI Assessment form has already been created for the current request.
  - Do **NOT** click **Delete** unless QM gives permission to do so. This is because if the data has already been submitted to the state, it may cause problems if the record for that suddenly disappeared. If you made a mistake and believe you need to delete an existing form, please contact ASK QM at HS_BHRS_ASK_QM@smcgov.org so they can look into if that data may be deleted.
CSI Assessment Form Overview

![Image of the CSI Assessment Form]

Initial Request and Appointment Information

Don’t forget to select the referral source!

Note about Urgent Appointments:
Both the “Does this urgent service require preauthorization” and “Time of First Offer Assessment Appointment” fields are only activated for Urgent appointments.

Currently, the only services that require prior authorization (referral from BHRS) that also fall under the scope of Timely Access tracking are:

- Therapeutic Behavioral Services
- Intensive Home-Based Services (IHBS)

The minimum requirements to start the form are:
- Initial Request Information section AND
- Assessment Appointment First Offer Information.

If you have not yet offered an appointment, wait until you have done so to start this form for a client.

You cannot save this form without the above elements. You save a draft version of the form by selecting “N” in the “Include CSI Submission” field and hitting “Submit” on the form.
Tracking Disposition

“Closure Reasons” Section

If client was discharged without having started treatment, both Closure Reason and Closed Out Date need to be filled out (e.g. declined services, was lost to follow-up, etc.).

If client started treatment, leave these fields blank, but make sure Treatment Start Date in the “Appointment Tracking” section is filled in.

If client is still in the assessment process or has not yet attended their initial treatment appointment, leave these blank.

“Referred To…” Section

“Referred To” field should only be filled out if the Closure Reason is Beneficiary did not meet medical necessity.
“NOABD” Section

If, at any point in the process, you issued a NOABD to the client, select which NOABD was issued.

“Include in CSI Submission” Section

“Full Name of Program” Field

If client has completed the process (either Closed Out Date or Treatment Start Date are filled in), select “Y.” Selecting “Y” is equivalent to “finalizing” the form.

If client has not yet completed the process (e.g., client is still in assessment phase or you are waiting for client to attend their first treatment appointment), then select “N.” Selecting “N” is equivalent to saving a form in Draft.

After clicking “Y” or “N,” click “Submit” at the top of the form and your data will be saved.
Client Alert

Client Alert Process

*All new clients who need to be tracked for Timely Access will have a client alert pop up on their Avatar chart.

QM will also send emails to Unit Chiefs and/or Program Specialists (or contract agency contact) to notify them if any clients recently admitted to their program meet criteria for Timely Access tracking.

Please note: Not all new clients who have a Client Alert will have a CSI Assessment form created because the CSI Assessment form cannot be started until an initial appointment offer is made.


Instructions for How to Setup Client Alerts for Timely Access

1. Search “Client Alerts” in the Search Forms field.
2. Enter the client ID in the Client Name/ID field, click Enter.
3. If the client is associated with previous alerts, the Pre-Display displays.
   - Select the client alert, click Add.
4. In the Type of Alert field, select the alert type.
   - Select Warning to display a warning alert and allow the user to open the form.
   - Use the Warning alert type to create an alert for Timely Access tracking.
5. In the Custom Message field, enter the alert message: “Fill out CSI Assessment form.”
6. [If appropriate, in the Disabled field, select Yes only when you want to disable/deactivate the alert type.]
7. In the Active or Active for Date Range field, enter Active to create an alert type that is not associated with a date range.
8. In the Applicable Forms field, select All Forms to select all forms. This selection is included alphabetically in the list.
9. In the Episodes field, select All Episodes to select all client episodes.
10. Click Submit.
Client Alert

**Updating the Alert**
When a program starts the CSI Assessment form, it should also update the alert to include Episode information (example: “Fill out the CSI Assessment form in Episode 5 North County Adult.”)

**To Update Information in an Existing Alert for Timely Access:**
Select *Edit* instead of *Add* in step 3 of the “Instructions for How to Setup Client Alerts.” Select the appropriate existing alert (Custom Message will show as “Fill out CSI Assessment form”) and add the episode information in the following format:

“Fill out the CSI Assessment form in Episode [number], [Episode name]”
(example: “Fill out CSI Assessment form in Episode 3 Central Youth Team”).

**Deactivating/Disabling the Alert**
Do this when the CSI Assessment is finalized/completed (“Y” is marked for “Include in CSI Submission”)

**To Deactivate/Disable an Existing Alert for Timely Access:**
When the client has reached the end of the tracking process and the CSI Assessment is completed (“Yes” marked for “Include in CSI Submission”), go to step 6 of the “Instructions for How to Setup Client Alerts” and select “Yes” to deactivate/disable the alert.