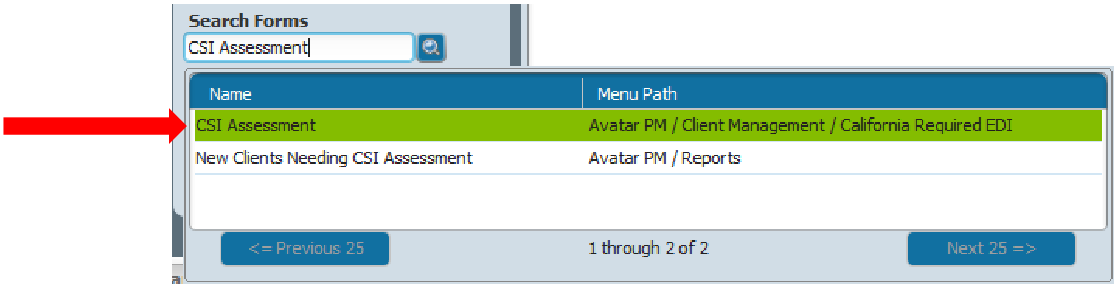
Timely Access forms Quick Guide

General Instructions for the CSI Assessment form and Client Alerts

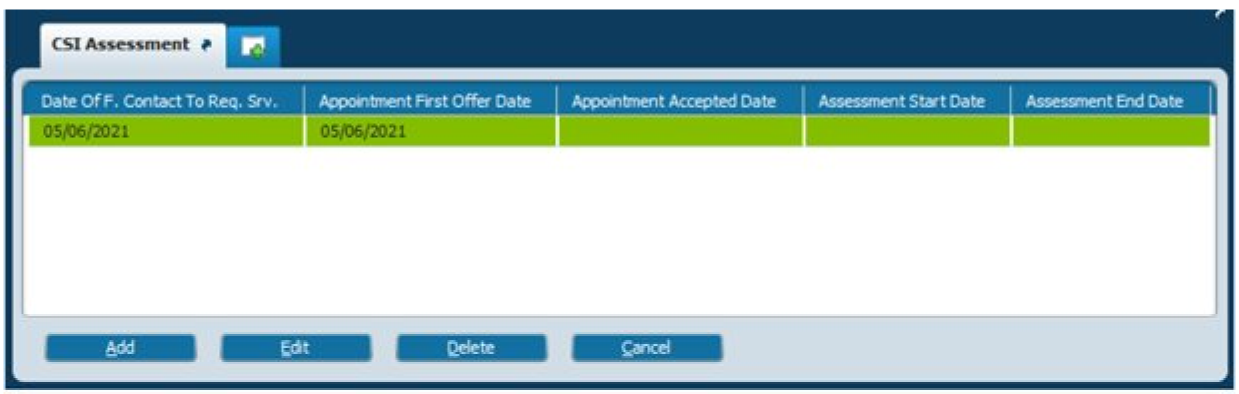
Contents

Creating or Editing a CSI Assessment form

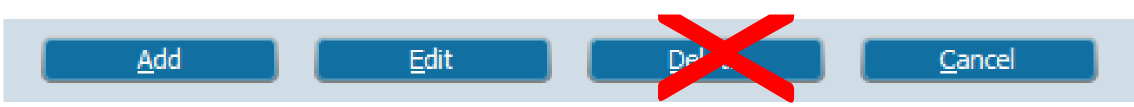
To find the form, type "CSI Assessment" into the "Search Forms" box in Avatar. Select the episode in which you will create the form.



- 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

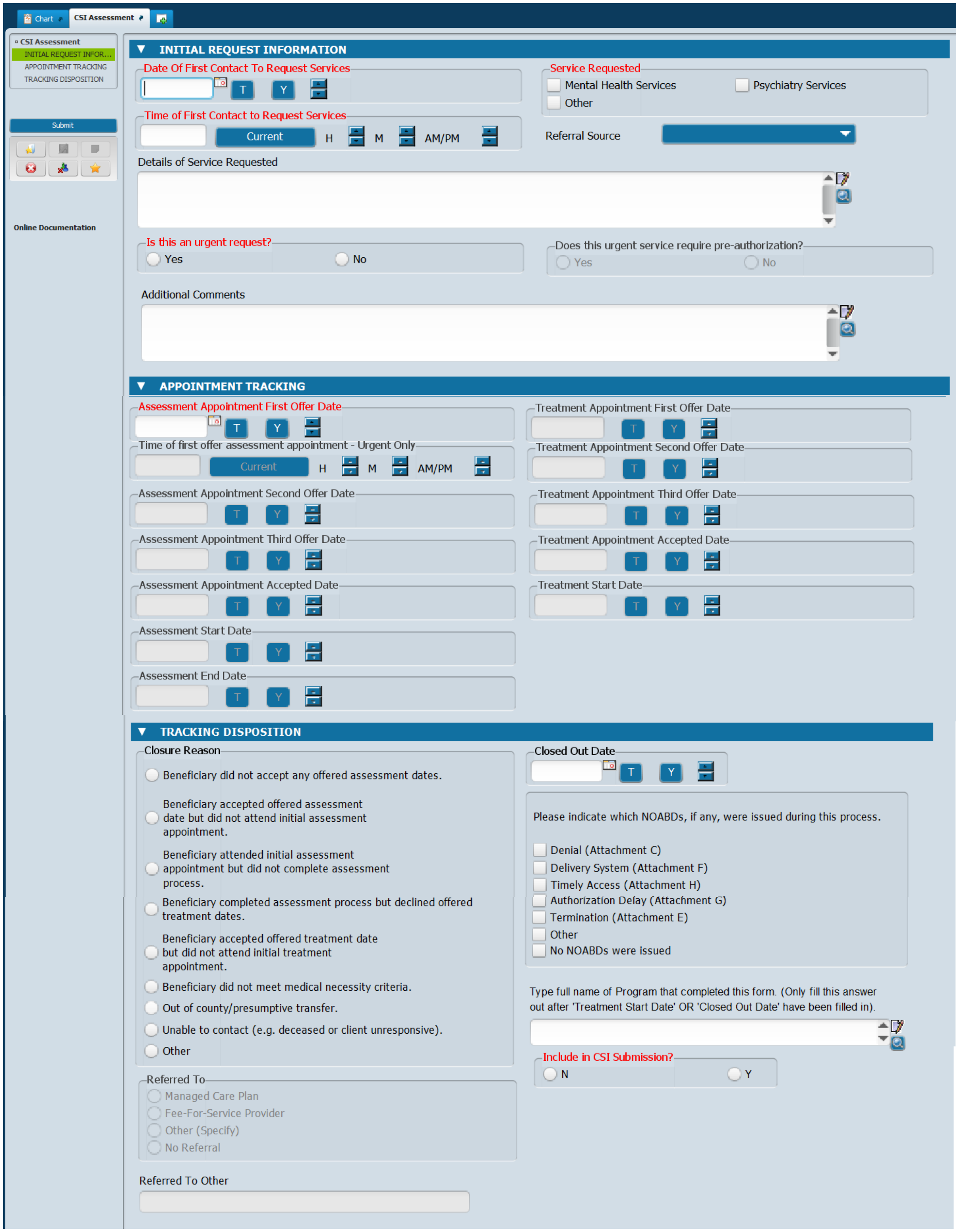


Chart | CSI Assessment

CSI Assessment
INITIAL REQUEST INFOR...
APPOINTMENT TRACKING
TRACKING DISPOSITION

Submit

Online Documentation

INITIAL REQUEST INFORMATION

Date Of First Contact To Request Services — T Y

Time of First Contact to Request Services — Current H M AM/PM

Service Requested: Mental Health Services; Psychiatry Services; Other

Referral Source

Details of Service Requested

Is this an urgent request? Yes / No

Does this urgent service require pre-authorization? Yes / No

Additional Comments

APPOINTMENT TRACKING

Assessment Appointment First Offer Date — T Y

Time of first offer assessment appointment - Urgent Only — Current H M AM/PM

Assessment Appointment Second Offer Date — T Y

Assessment Appointment Third Offer Date — T Y

Assessment Appointment Accepted Date — T Y

Assessment Start Date — T Y

Assessment End Date — T Y

Treatment Appointment First Offer Date — T Y

Treatment Appointment Second Offer Date — T Y

Treatment Appointment Third Offer Date — T Y

Treatment Appointment Accepted Date — T Y

Treatment Start Date — T Y

TRACKING DISPOSITION

Closure Reason
- 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

Referred To
- Managed Care Plan
- Fee-For-Service Provider
- Other (Specify)
- No Referral

Referred To Other

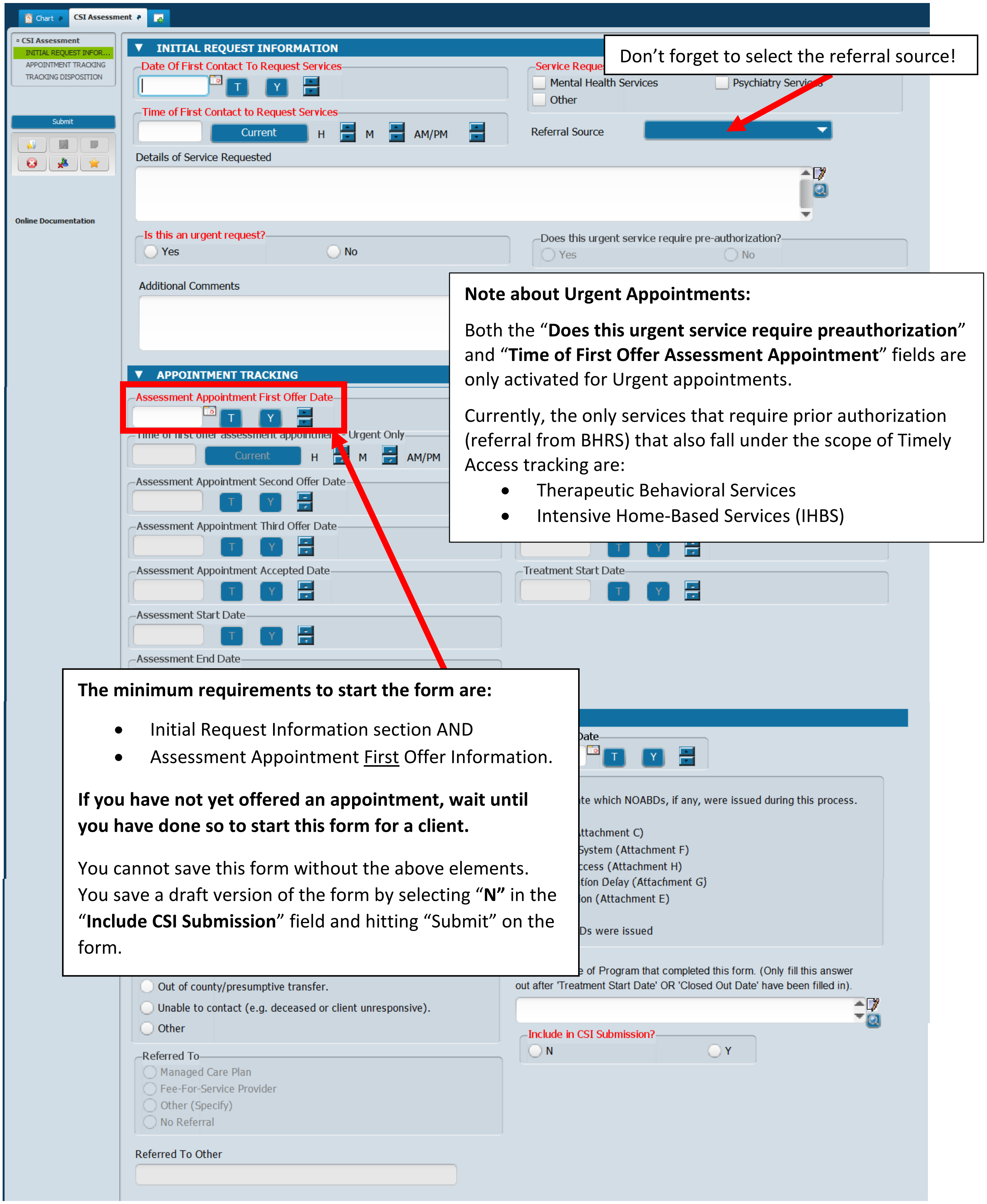
Closed Out Date — T Y

Please indicate which NOABDs, if any, were issued during this process.
- Denial (Attachment C)
- Delivery System (Attachment F)
- Timely Access (Attachment H)
- Authorization Delay (Attachment G)
- Termination (Attachment E)
- Other
- No NOABDs were issued

Type full name of Program that completed this form. (Only fill this answer out after 'Treatment Start Date' OR 'Closed Out Date' have been filled in).

Include in CSI Submission? N / Y

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:

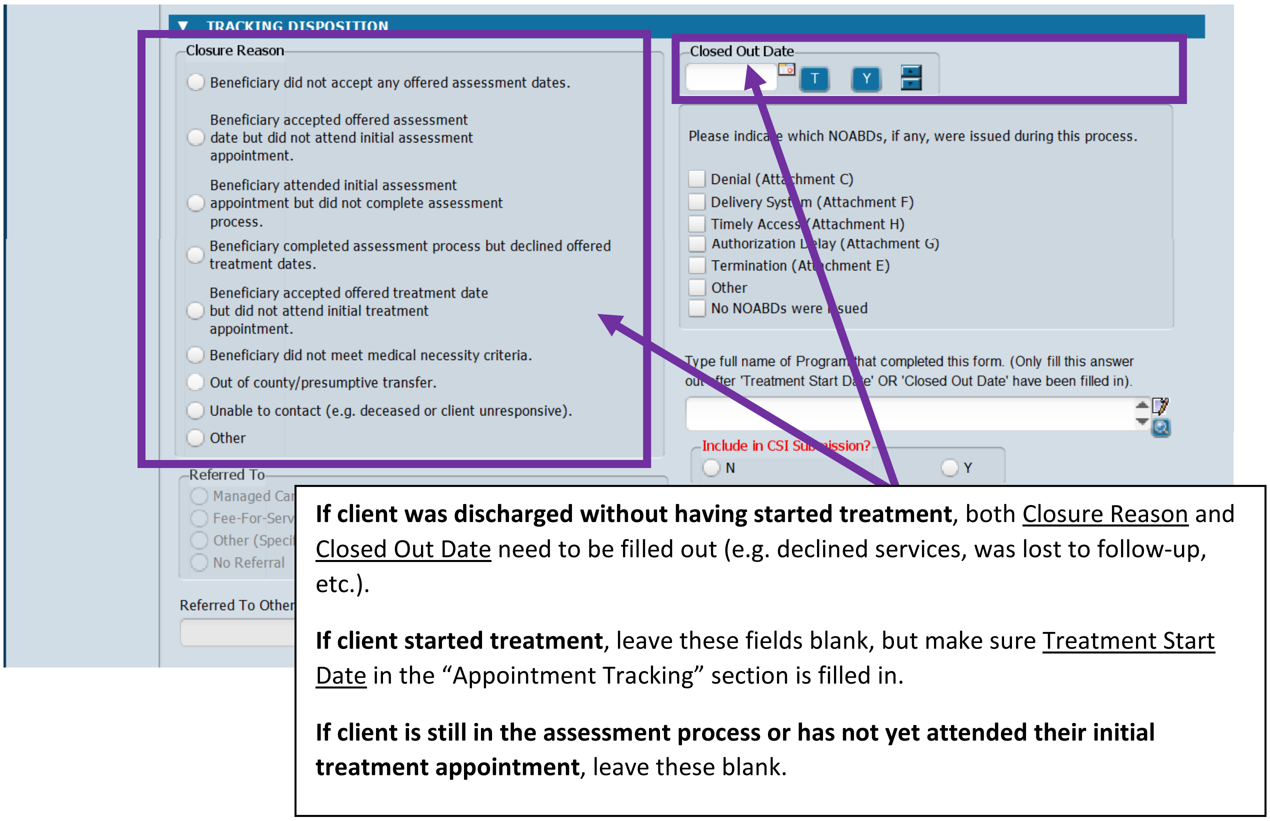
- Initial Request Information section AND
- Assessment Appointment <u>First</u> Offer Information.

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

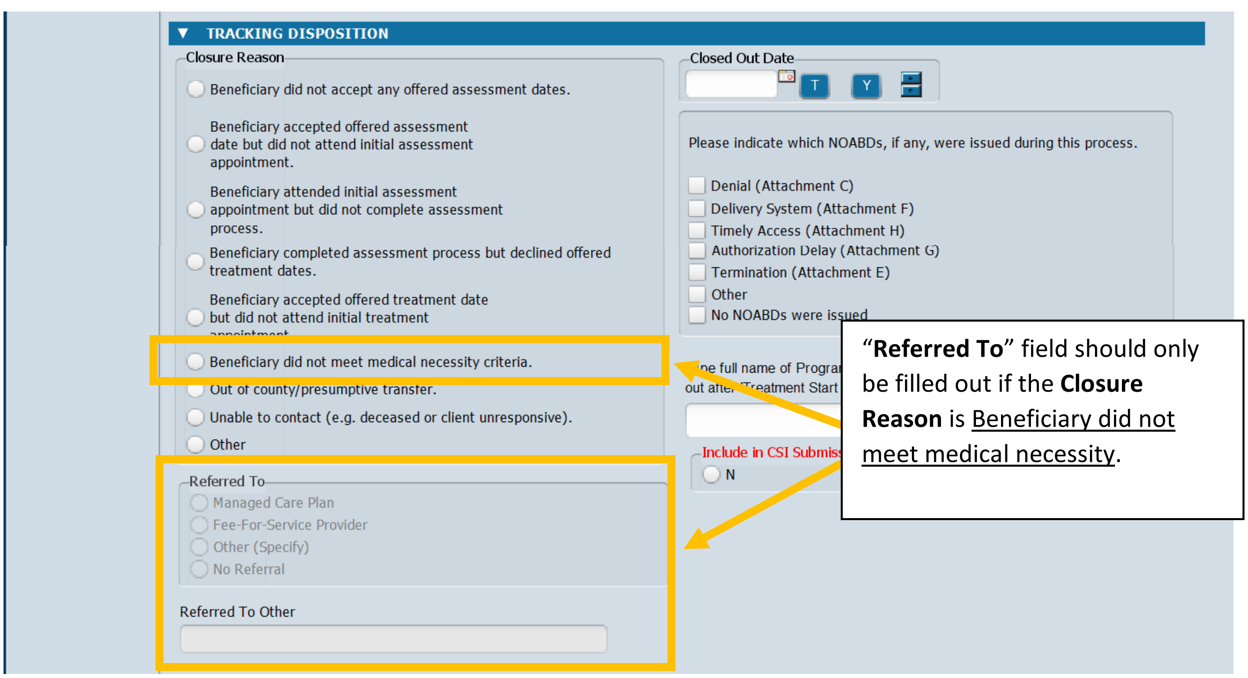


If client was discharged without having started treatment, both Closure Reason and Closed Out Date need to be filled out (e.g. declined services, was lost to follow-up, etc.).

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

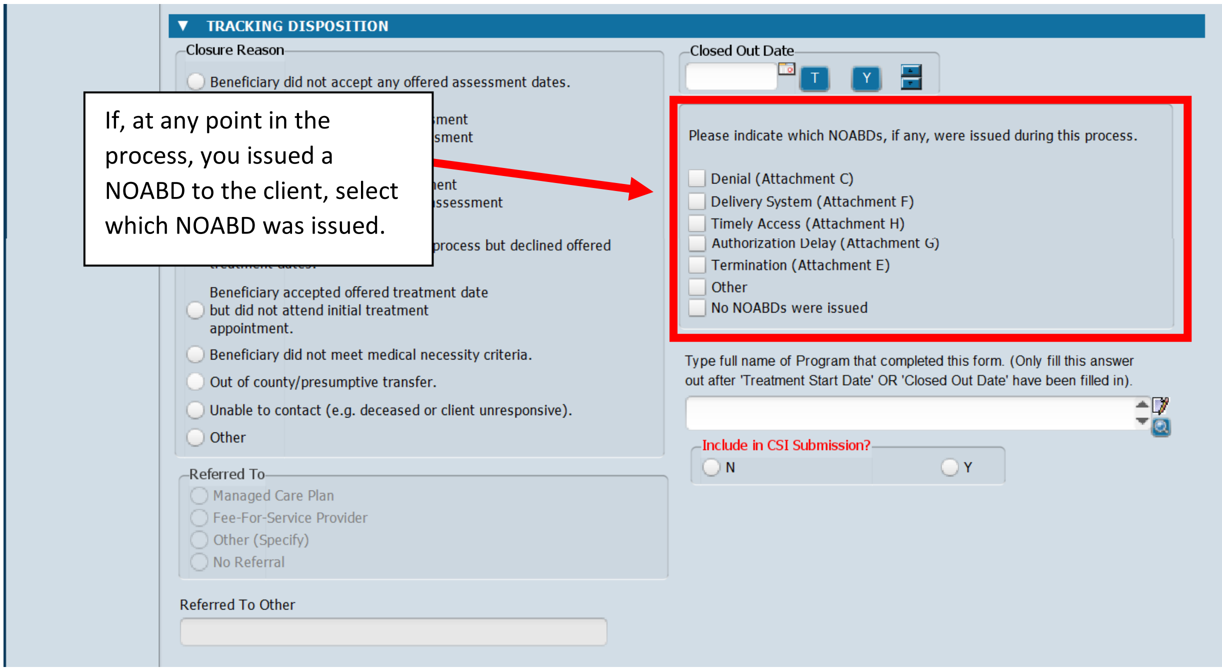
If client is still in the assessment process or has not yet attended their initial treatment appointment, leave these blank.

"Referred To…" Section

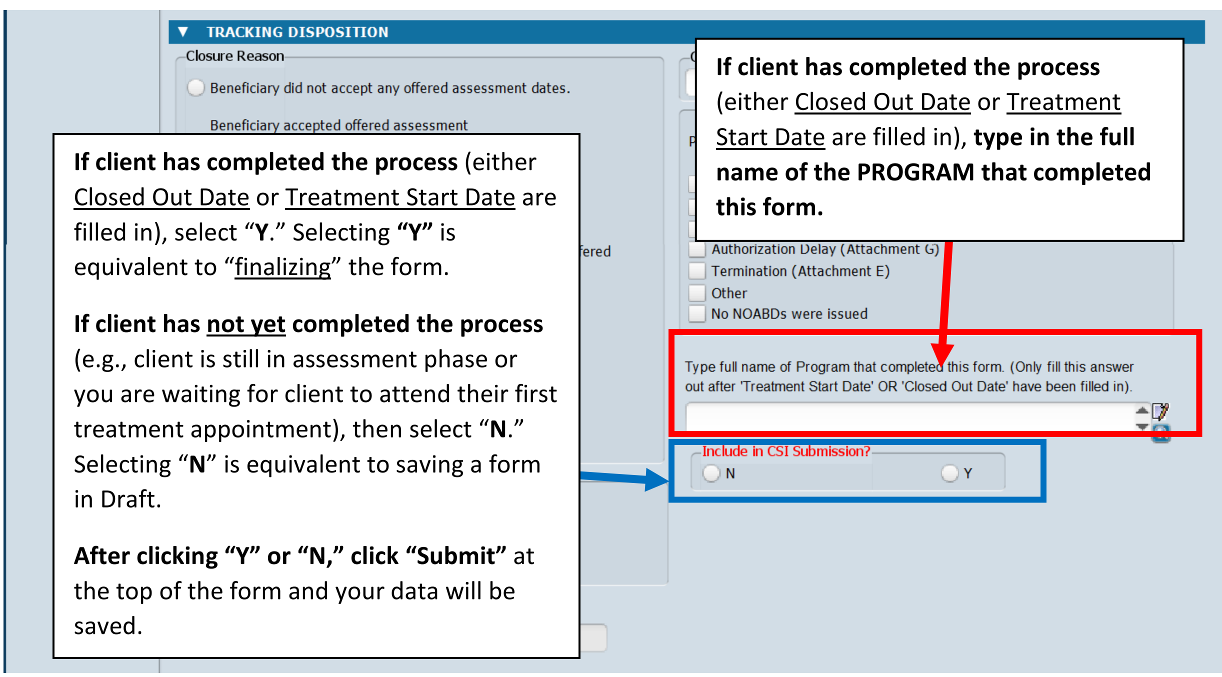


"**Referred To**" field should only be filled out if the **Closure Reason** is Beneficiary did not meet medical necessity.

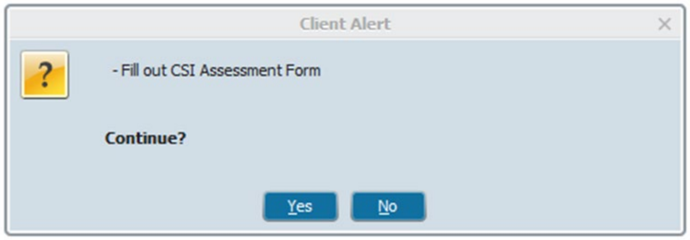
“NOABD” Section



“Include in CSI Submission” Section
“Full Name of Program” Field



Client Alert

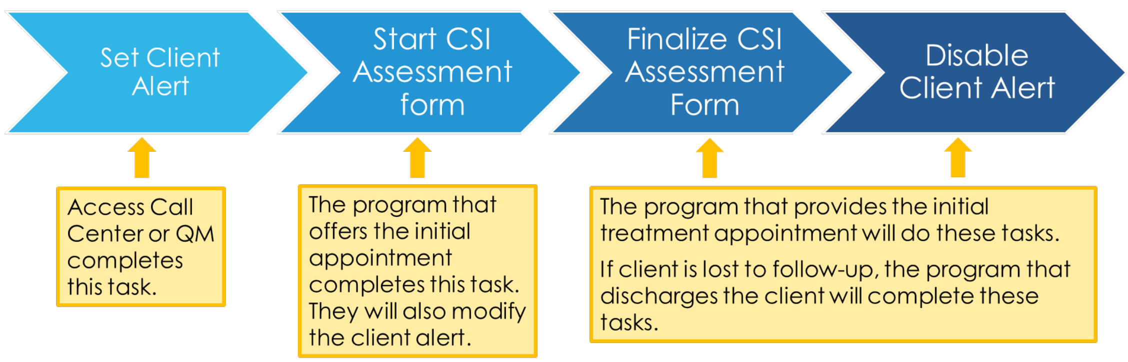


Client Alert Process

***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.

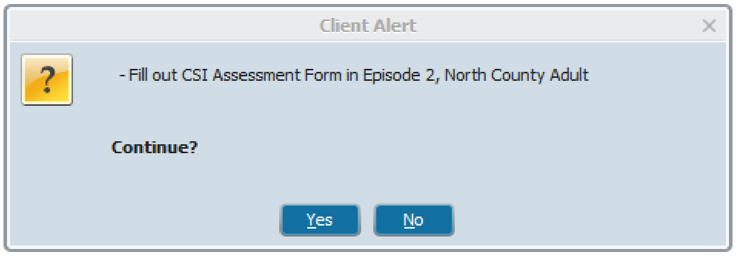
Please note: Not all new clients who have a Client Alert will have a CSI Assessment form created because the CSI Assessment form cannot be started until an initial appointment offer is made.



For more information on the full process for new clients, please refer to the "NOABD and Timely Access Process for New Clients Decision Tree" (https://www.smchealth.org/bhrs-policies/network-adequacy-standards-18-02).

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**.



Updating the Alert

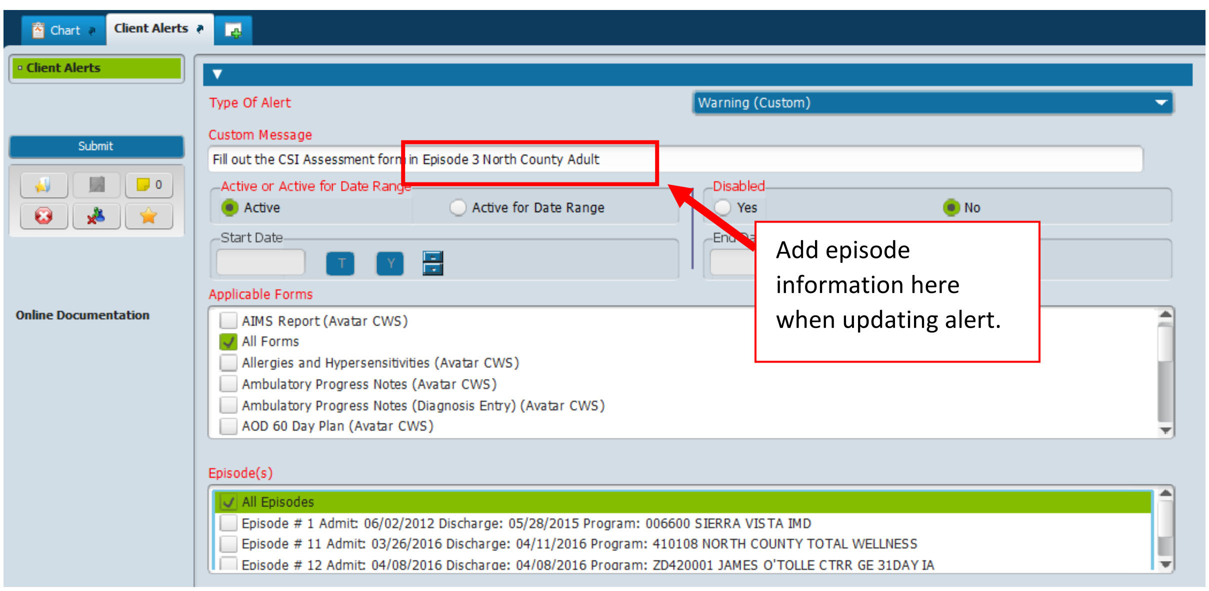
When a program starts the CSI Assessment form, it should also update the alert to include Episode information (example: "Fill out the CSI Assessment form in Episode 5 North County Adult.")

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 if 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.