

ALAMEDA COUNTY

BEHAVIORAL HEALTH CARE SERVICES

INSYST

SUD MINI MANUAL

V10.02

BHCS – Information System Support Services

Phone: (510) 567-8181

(M-F 7:30am to 4:30pm)

FAX: (510) 567-8161

E-Mail: HIS@acbhcs.org

BHCS Web Site: <https://go.bhcsportal.org>

Provider Relations (800) 878-1313

Contents

CHAPTER 1: LOGGING ON 4

CHAPTER 2: BASIC CLIENT INFORMATION 12

CLIENT NAMING CONVENTION RULES..... 16

CHAPTER 3: CLIENT EPISODES 29

CHAPTER 4: DIRECT SERVICES 46

CHAPTER 5: REPORTS 58

CHAPTER 6: UTILITIES..... 67

COUNTY/ STATE CODES 71

CLIENT REGISTRATION & EPISODE DATA ENTRY CODES 76

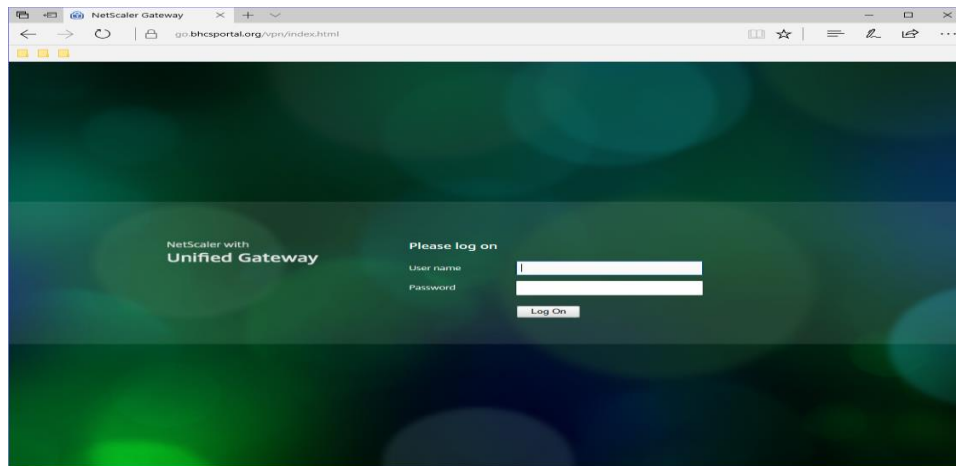
INSYST MENU SHORTCUT & COMMANDS 80

Chapter 1: Logging On

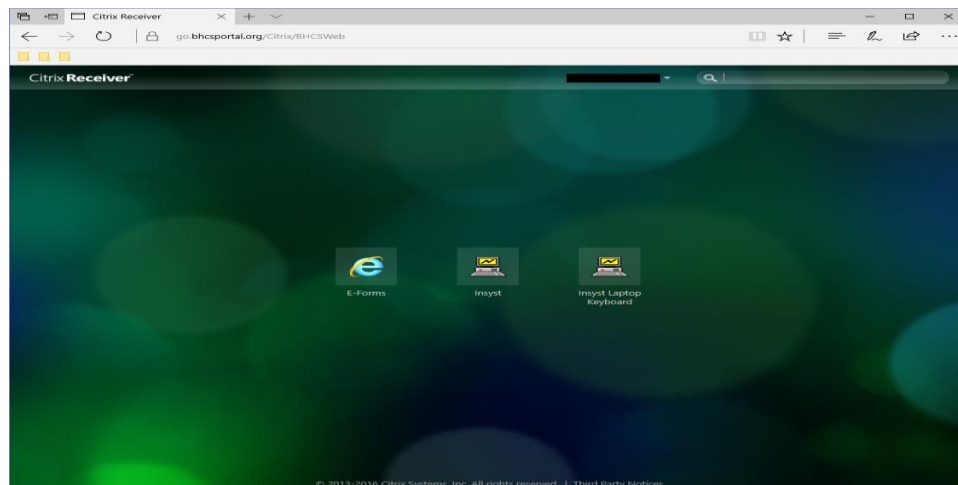
Logging onto the BHCS Web Portal

You must log onto the BHCS Web Portal to access INSYST.

1. The BHCS Web Portal address is: <https://go.bhcsportal.org>
2. Type your Username, and press Tab
3. Type your password and press Return or click Logon button. To protect its secrecy, your password is displayed on your screen as dots.



4. Chose the type of computer (Desktop or Laptop) you are using.

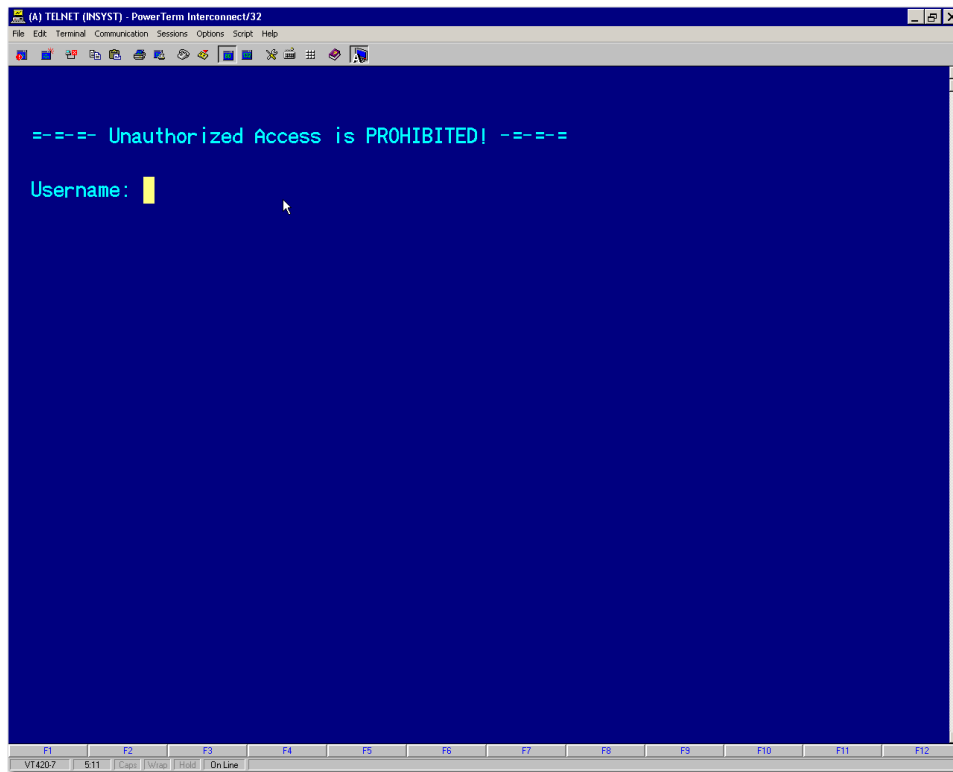


A new Internet Explorer Window will open with the INSYST Logon Screen.

Make sure you **LOGOFF** the Web Portal **BEFORE** closing the Internet Explorer Window.

Logging on to INSYST

1. Your screen displays the prompt: **USERNAME:** Type your Username, and press Return.
2. Then the computer prompts you for your password. Type your password and press Return. To protect its secrecy, your password is not displayed on your screen.
3. INSYST displays its Logo and any notices or messages. Press Return to scroll to the first of two bulletin boards, followed by the Main Menu.



Note:

Make sure you **LOGOFF** the INSYST **BEFORE** closing the Internet Explorer Window.

Using Menus

An INSYST menu is a list of items that you may select. Figure 1.1 shows a sample Main Menu. The Main Menu is different based on data input requirements. Below is an example of an Opening Main Menu for user who is entering data for both Mental Health Services and Alcohol and Other Drugs Services. Most users don't have this menu option.

I n S y s t

11-Aug-17 04:07 PM

MAIN MENU

Selection:

Selection	Description
MHS	MHS Menus
DAS	DAS Menus
UTILITIES	General Utilities Menu

Figure 1.1: Main Menu

The menu structure is virtually the same for the MHS and the DAS systems. Some screens are different for the two systems; this manual only provides details MHS screens. The SUD Main Menu is shown in Figure 1.2.

After you make a selection from the Main Menu, the system displays a submenu. For example, if you choose UTILITIES in the Main Menu, you will move to the Utilities Menu, with options that you select to use INSYST utilities.

Based on your User Authorization all menu options may not be activated.

I n S y s t

11-Aug-17 04:00 PM

MAIN MENU
Alcohol & Drug

Selection:

Selection	Description
CLIENTS	Client Maintenance Menu
DDP	DDP Maintenance Menu
APPTS	Appointment Maintenance Menu
EPISODES	Episode Maintenance Menu
SERVICES	Service Maintenance Menu
INDIR_SERV	Indirect Service Maintenance Menu

Figure 1.2: SUD Main Menu

All INSYST menus let you make selections in three ways: by using the list of options in the menu selection area, or by typing an alpha or numeric option directly in the command line.

To select a command in the Menu Selection Area:

1. Press the Tab key and the blinking cursor will move from the Command Line into the list of items in the Menu Selection Area of the screen. Then move the cursor up and down through the menu using the Up and Down Arrow keys.
2. When you have moved the cursor to the item you want, type "X" and press Return.

At the bottom corners of the Menu Selection Area there is often a flashing "V." This indicates that there are more items on your menu than you can see at one time. Press the Down Arrow key and the menu will scroll to display more items.

If you want to return to the Command Line, press Enter.

To select an item from the Command Line:

1. Type the name or number of the item on the Command Line. The command line is the solid bar next to the word Selection, where the cursor is when you first display the menu. You may type the entire name of the item, or just enough make it distinct from the others. For example, if you want to choose SERVICES from the Main Menu, you may type either "SERVICES" or "SER". You may also type the number of the selection. For example, if Client Records Maintenance is the first item on the menu, you can just type "1" to select it.
2. Press Return to display the screen or sub-menu you selected.

Leaving a Menu

Press Num Lock (Gold)-E, or enter a hyphen (-) in the Command line to move back one menu to the previous menu. For example, if you are on the Files Menu, "-" will take you back to the Utilities Menu, and a second "-" will take you back to the Main Menu.

Using Num Lock (Gold) and Control Keys

To use a Num Lock (Gold) Key sequence:

1. Press and release the Num Lock (Gold) Key.
2. Press and release the other key in the sequence.

For example, if the instructions say, "Press Num Lock (Gold)-E", you should press and release the Num Lock (Gold) key, and then and release press "E".

Menu and Control Key Commands are located on the last page and the back of this manual.

Laptop Users

Use the "F9" Key as the Num Lock key if your laptop does not have a ten key pad.



Menu Shortcuts

You can go directly from one menu to a screen that is under another menu, rather than moving through the menu system one menu at a time. In the command line of the current menu, enter the Menu names that you would normally enter in the command lines of one menu after another.

For example, to go from the Main Menu to the Episode Opening screen, you normally enter “EP” in the Main Menu to display the Episode Records Menu, and then enter “OP” to display the screen. As a shortcut, you can enter the command “EP OP” in the Main Menu command line (Figure 1.3).



Figure 1.3: Using Menu Shortcuts

Using Screens

INSYST's menu system displays the data screens (Figure 1.4) that let you enter, look up, change and delete information.

In Screens, data is entered or displayed in areas called **fields**. For example, a screen may have a field for a client's last name and another field for address. Most screens have special fields, called **key fields** that identify each record such as the client number field that identifies each client.

Each screen has a different function—*e.g.*, to register a client, review a client’s account, or update episode information. Screens are assigned to you based on your responsibilities.

Client Locator Screen

SMITH			N
Last Name	First Name	Clt Idx No.	Soundex
Client Number	000-00-0000	0	0
	Social Security No.	Account No.	Other ID

First	M	Last	Number	Birth Date	Sex	SSN	CIN
*ANN		L SMITH	271	31-Jan-1963	F	Unknown	
*AVERY		SMITH	178	04-Jul-1958	M	001-22-0609	
*BABS		SMITH	315	10-Dec-1940	F	Unknown	
BEAVIS		Q SMITH	383	20-Aug-1947	M	Unknown	

Selection:

EPISODE	Mini Open Episode Status
FINANCIAL	Mini Financial Status

Confidential Information USER: COUNTY1

4 clients displayed.

Figure 1.4: An INSYST Screen with a List

Moving through Fields

Use these keys to move through a screen's fields:

- **Tab:** Move the cursor to the next field to enter data. (If you fill a field entirely, the cursor will move to the next field automatically).
- **Control/H: (F12)** Move the cursor back one field.
- **Return:** Skip over optional fields and move to the next required field or to the prompt used to leave the screen.

Moving Through Lists

Many screens have lists, like the list of insurance companies shown in Figure 1.4 above. To move down one item in the list, press the Tab or Down Arrow key. To move up one item in the list, press the Up Arrow key.

If a list has more items than fit in one screen, you can page through it to see more items by pressing:

- **Num Lock (Gold)-M: (More)** View the next page of information.
- **Num Lock (Gold)-B: (Backup)** View the previous page of information.

To speed up performance, lists usually include only two pages of information by default. If you have to see more items than this, you should request unlimited paging by pressing **Num Lock (Gold)-A** before you display the list.

Leaving a Screen

To leave a screen, press:

- **Return:** In most cases, pressing Return moves the cursor to the prompt used to leave the screen. (In some cases, Return skips over optional fields to the next required field.)

- **Num Lock (Gold)-E:** Exits from the current screen and returns to the menu, without saving data entered in the screen.
- **Num Lock (Gold)-S:** Exits from the current screen, and saves the data entered. This sequence retains the current Client and Reporting Unit, so it automatically displays it in the next screen you use.

Note: Menu and Control Key Commands are located on the last page and the back of this manual and in Appendix C on page 74 of this manual.

Client Confidentiality

INSYST helps your staff in maintain confidentiality, as required by HIPAA, federal, state, and local regulations.

Do not let anyone else use your account. You username is recorded on some records in the database.

Each registered user has a password. **Do not give out your password** for use by other staff or post it near your terminal.

Do not browse through records looking for friends, acquaintances or known persons. **This is illegal.** You must have a legitimate purpose for looking-up a person.

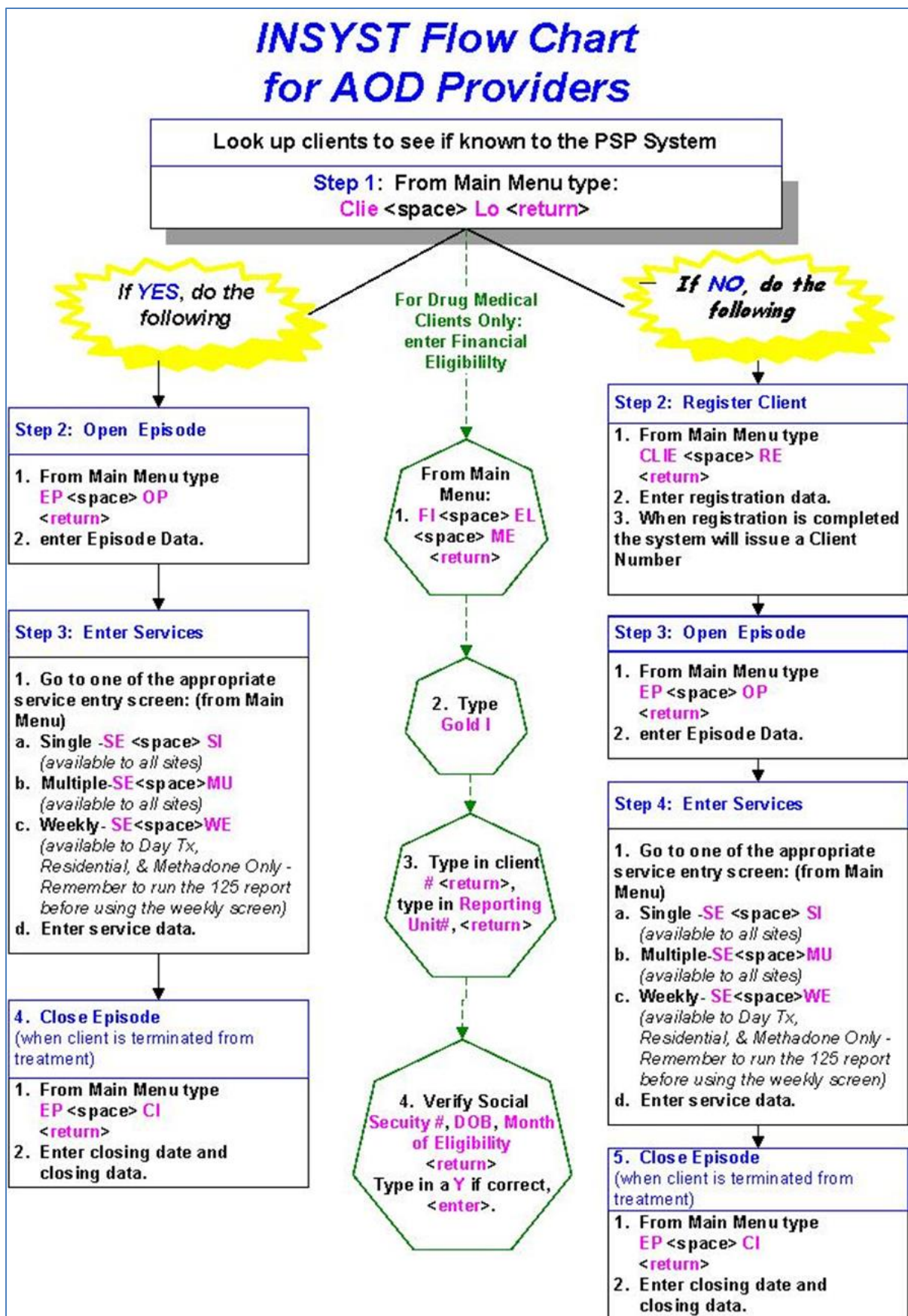
Do not release data without authorization. For more information, consult your Medical Records Department.

Logging Off the Computer

To log out of INSYST, enter the word "Exit" on the command line of any menu.

Never exit the Internet Explorer Window until you have seen a message confirming that you are logged off INSYST. The message includes your name, the date and time that you log off the computer.

Note: Make sure you **LOGOFF** the Web Portal **BEFORE** closing the Internet Explorer Window.



Chapter 2: Basic Client Information

The Client Number

Before you can work with any client information, the client must have a client number. If a client is new to your program, you must determine whether the client has a number, by using the Client Locator screen, described below. If you cannot find the client number, assign a new client number using the Client Registration Screen, described later in this chapter.

Locating Clients

The Client Locator Screen lets you find out if someone has ever been a client and lets you display information about clients

To use the Client Locator Screen:

- 1. Choose CLIENTS from the Main Menu.
- 2. Choose LOCATOR from the Client Maintenance menu to display the Client Locator screen (Figure 2.1).

TIP:

From the Main Menu “1 7” is a great Menu Short Cut to the Client Locator Screen.

Client Locator Screen

Last Name		First Name		N Soundex	
Client Number	Social Security No.		Account No.	Other ID Number	

Selection:

EPISODE	Mini Open Episode Status
FINANCIAL	Mini Financial Status

Confidential Information

USER: SMITH

Enter information for client location.

Figure 2.1: Client Locator Screen

Client Information Area

The top section of the screen is the Client Information Area, where you enter criteria to search for a client, and where information is displayed when the client is found.

Note:

Before registering a new client, be sure you have tried all possible spellings of the client's name and aliases. Press Num Lock (Gold)-R to restart the screen and search with other spellings of the client's name. If necessary, press Num Lock (Gold)-A before doing the new search, so the list is not limited to 8 names.

To search for a client:

1. Make an entry in one or more fields of the Client Information Area.
2. Press Return at any time to search for a client matching the information you have entered.

The Client Information Area has the following fields:

- **Client Name:** Enter the client's full name or only the first few letters of the client's name. For example, if you enter "And" as the last name, you will find clients with the names Anders, Anderson, Andrews, *etc.*
- **Client Number:** If you know the Client Number, the fastest way to look up the client is to press Num Lock (Gold)-C to move to the Client Number field and enter the client's number.
- **Social Security Number:** If you do not have a Client Number, the Social Security Number is the fastest way to find the client. If you have the client's Social Security Number, press the Tab key to skip the other fields and enter the SSN here. You do not need to enter "-" between the numbers.

Note:

If you enter the Social Security Number and Client Name, the computer searches on the Social Security Number and returns the client information if it finds a match. This may not be the client name you have entered, if another client has used that Social Security Number. If there is no match on Social Security Number, the search is based on name.

Note:

All SUD (Substance Use Disorder) programs must follow the data collection protocols as detailed in the CalOMS Data Collection guide found on the CalOMS page of the BHCS Provider Website: www.acbhcs.org/providers

If there is an exact match, all fields on the top half of the screen are filled with information about the client (Figure 2.2).

If there is no match, the system displays the message: Client/Clients not found.

If there are several possible matches, they are listed in the Client Selection Area of the screen, described below.

Client Locator Screen

GLASS Last Name		BUDDY First Name		N Soundex	
500000040 Client Number	333-44-5555 Social Security No.		0 Account No.	Other ID Number	

STATUS LINES

Client messages: 3 active messages.

Selection:

EPISODE	Mini Open Episode Status
FINANCIAL	Mini Financial Status

Confidential Information

USER: SMITH

Figure 2.2: An Exact Match in the Client Information Area

Client Selection Area

The second section of the screen is the Client Selection Area. If there is more than one possible match, records beginning with the first possible match are listed alphabetically here (Figure 2.3).

To use the Client Selection Area:

- 1. Move through the list using the methods described in the section on Moving Through Lists in Chapter 1.

Client Locator Screen

GL Last Name		First Name		N Soundex	
Client Number	- - Social Security No.		Account No.	Other ID Number	

First	M	Last	Number	Birth Date	Sex	Eth	SS Number
BUDDY	L	GLASS	500000040	08-Jul-1943	M	A	333-44-5555
SEYMOUR		GLASS	500000039	05-Mar-1935	M	A	123-45-3211
WILLIAM		GRUMPY	500000041	29-Oct-1950	M	A	222-33-6666
EMILY		MOTHERSON	500000028	01-Dec-1942	F	A	Unknown

Selection

EPISODE	Mini Open Episode Status
FINANCIAL	Mini Financial Status

4 clients displayed.

Confidential Information

USER: SMITH

Figure 2.3: Possible Matches in the Client Selection Area

- 2. Type “X” next to the client you want, and press Return. Data on that client is displayed in the Client Information Area.

You can select multiple clients on a page by putting “X” next to each, and then pressing Return. Then you display data on them by using the Previous and Next options in the Menu Selection Area (described below).

Aliases are displayed in the Client Selection Box with an asterisk (*) next to the name. They are selected like other names in the list, but the computer displays the client's real name in the Client Information Area.

If you find the target client in this list, note the client number, so you can use it to work with the client. If you do not find the target client, you must register the client into the system.

- **Num Lock (Gold)-F: (Face Sheet)** request the menu to select Face Sheets, and then press **F6** to complete the request. The Face Sheet is placed in your printer queue ready to print.

Menu Selection Area

The lowest portion of the Locator screen is the Menu Selection Area, where you can enter commands to find more information on the client who is displayed in the Client Information Area.

As with any INSYST menu, you may select a menu item by entering the first letters of your menu choice (For Example, Figure 2.4 illustrates the choice of "E" for Episodes), or by using Tab key to move to the item you want and typing an "X" next to it.

Client Locator Screen			
GLASS Last Name	SEYMOUR First Name	N Soundex	
500000039 Client Number	123-45-3211 Social Security No.	0 Account No.	Other ID Number
STATUS LINES			
Client messages: 2 active messages. Opened at: Test OP (99999) 30-Dec-86			
Selection: E XXXXXXXXXX			
EPISODE	Mini Open Episode Status		
FINANCIAL	Mini Financial Status		
Confidential Information USER: SMITH			

Figure 2.4: Selecting a Menu Item

The menu gives you the following options:

- **EPISODE Mini Open Episode Status:** Gives you a short listing of all programs (or reporting units) at where the client is currently admitted.
- **FINANCIAL Mini Financial Status:** Displays current account information and charges for the client.
- **STATUS Client Status Summary Report:** Takes you to the Client Status Summary Report Screen, which displays the client's current open episodes, closed crisis episodes, and current account information.
- **NEXT Display Next Client:** If you selected multiple clients in the Client Selection Area, this option will display data on the next one in the Client Information Area.
- **PREVIOUS Display Previous Client:** If you selected multiple clients in the Client Selection Area, this option will display data on the previous one in the Client Information Area.

Some of these options display data in the same area that you used for client selection, as you can see in Figure 2.4, where message status is displayed there.

Registering a New Client

If you cannot find new clients using the Client Locator Screen, you must register them to give them a client number before you can open episodes and enter services for them. Follow the client naming convention rules to enter the client's information into InSyst.

Client Naming Convention Rules:

Last Name

- Enter a last name with up to 16 letters
- Last Name must ALWAYS exactly match Medi-Cal/Medicare name
- Leave out apostrophes and blank spaces unless the Medi-Cal/Medicare name has them.
 - "O'Connor" should be typed "OCONNOR"
 - "Torres-Smith" should be typed "TORRES-SMITH" or as stated on Medi-Cal/Medicare card
- DO NOT enter Jr., Sr., etc. in the Last Name field, these are to be entered in the Generation field (see below)
- DO NOT enter spaces in front of name

First Name

- Enter a first name with up to 12 letters
- First Name **must** ALWAYS exactly **match** Medi-Cal/Medicare name
- Leave out apostrophes and blank spaces unless the Medi-Cal/Medicare name has them.
- DO NOT enter spaces in front of name

Middle Name

- Enter a middle name with up to 16 letters
- Middle Name **must** ALWAYS exactly **match** Medi-Cal/Medicare name
- Leave out apostrophes, dashes and blank spaces unless the Medi-Cal/Medicare name has them.
- DO NOT enter spaces in front of name

Client Generation

- Enter a generation title that is part of the client's name, such as Jr., Sr., or the Roman Numerals II, III, etc.
 - Do not enter titles like M.D. or ESQ.

Alias Name

- Enter any alternate forms that the client name may be presented.
 - "O'Connor" should be typed without the apostrophe in the regular name field; it should be entered in the alias field with an apostrophe.
 - "Torres-Smith" should be typed "TORRES-SMITH" in the regular name field; it should be entered in the alias field as "Torres Smith".
- DO NOT enter spaces in front of name

NOTE: Birth Name, Place of Birth and Mother's First Name MUST be entered on Screen "2"

To register a client:

1. Choose CLIENTS from the Main Menu.
2. Choose REGISTER from the Client Maintenance Menu to display the Client Registration screen (Figure 2.5).

Client Registration (Decentralized)			
Reporting Unit: 99999 TEST			
Last: JOHN Generation: CIN: 143562	First: JOHNSON Birthdate: 05/01/1960	Sex: M SSN: 999-99-9999	Middle: Z2
Education: 12 Disability: 10 Language: 1 Ethnicity: A B C D E Hispanic Origin: 1 Marital Status: 1 Family Size: 02 Annual Income: 300000	Other Factors: Service Group: Primary RU: 45015 Chart Location: Ref. Staff ID: 7197	Other ID: Local Code: Program Code: Research Item:	Enter Address: N Significant Others: N
Aliases	Last	First	Middle
Form Ok Y/N: Y Confidential Information USER: COHEN_ET			

Figure 2.5: Client Registration Screen 1

Because the information entered in the Client Registration screen establishes the client's identity, it is best to ask the client for a Driver's License, Social Security Card, or other document and copy the information from it. Three critical pieces of information must be entered correctly: client name, birth date, and Social Security Number.

3. Enter data in the following fields:

- **RU:** Enter the Reporting Unit Number for the program where you are registering the client. This field establishes whether you are using decentralized or centralized registration. With decentralized registration, the system automatically assigns a client number and you can enter episodes and services for the client. With centralized registration, you can register a client and enter episodes, but you cannot to enter services until the registration has been evaluated by a central registration auditor. After you have entered the Reporting Unit, the screen title changes to Client Registration (Centralized) or Client Registration (Decentralized).
- **Last Name:** Enter a last name with up to 16 letters. Leave out apostrophes, dashes and blank spaces. For example "O'Connor" should be typed "OCONNOR".
- **First Name:** Enter a first name with up to 12 letters.
- **Middle Initial:** Enter one letter as a middle initial, or press the Tab key or space bar to skip this field if there is no middle initial.
- **Client Generation:** Enter a generation title that is part of the client's name, such as Jr., Sr., or the Roman Numerals II, III, etc.
- **Birthdate:** Enter the birth date in MM/DD/YYYY format.
- **Sex:** Enter "F" for female, "M" for male, or "U" for unknown, or "Z3" for other
- **Social Security Number:** Enter a nine-digit Social Security Number. It is best to copy this key information directly from the client's Social Security Card if possible. If the client does not have one, enter all 9's in this field. Enter "Z0", "Z2" or "Z4" in the field to the right of SSN, if Social Security Number is all 9's.

- **Client Index Number:** Enter a nine-digit Client Index Number.
- **Education:** Enter the number of the highest grade completed. For example, if the client has completed high school, enter “12”. If the highest grade is greater than 20, enter “20”. Enter “Z0” or “Z4” if client declined to state or unable to answer.
- **Disability:** Add the number codes for all of the client’s physical disabilities, and enter the total in this field. InSyst’s standard disability codes are listed in Appendix C of this manual, but your local agency may use different codes. Add the number codes for all of the client’s physical disabilities, and enter the total in this field. Enter “Z0” or “Z4” if client declined to state or unable to answer.
- **Language:** Enter the code for the language the client prefers to speak, as reported by the client. InSyst’s standard language codes are listed in Appendix C of this manual, but your local agency may use different codes.
- **Ethnicity:** Enter up to five (5) Ethnicity codes. The codes are listed on the Client Registration form.
- **Hispanic Origin:** Enter the appropriate Hispanic Origin as reported by the client. The codes are listed on the Client Registration form.
- **Marital Status:** Enter the Marital Status code. InSyst’s standard codes are listed in Appendix C, but your agency may use different codes. (Note that Code 1, Never Married, is used for a single person who does not live with girlfriend/boyfriend and has never been married.)

Client Registration (Decentralized)											
New Client Number: 0	Reporting Unit: 99991 PSP OPT										
<table border="1"> <tr> <td>Client Birth Name:</td> <td>First: ETTIE</td> </tr> <tr> <td>Last: ARNON</td> <td>Mother first name: MAL</td> </tr> <tr> <td>Birth place: 38 CA</td> <td></td> </tr> <tr> <td>Driver's License:</td> <td>State: CA</td> </tr> <tr> <td>Number: 12322576</td> <td></td> </tr> </table>		Client Birth Name:	First: ETTIE	Last: ARNON	Mother first name: MAL	Birth place: 38 CA		Driver's License:	State: CA	Number: 12322576	
Client Birth Name:	First: ETTIE										
Last: ARNON	Mother first name: MAL										
Birth place: 38 CA											
Driver's License:	State: CA										
Number: 12322576											
Form Ok Y/N: <input checked="" type="checkbox"/>	Confidential Information USER: COHEN_ET										

Figure 2.6: Client Registration Screen 2

- **Birth Last Name:** Enter a last name with up to 16 letters. Leave out apostrophes, dashes and blank spaces. For example “O’Connor” should be typed “OCONNOR”.
- **Birth First Name:** Enter a first name with up to 12 letters or enter “Z2”.
- **Birth County:** Enter Clients’ birth county or “Z3”.
- **Birth State:** Enter Clients’ birth state or “Z3”.
- **Mother’s First Name:** Enter a first name with up to 12 letters. If unknown enter “Mother”.
- **Driver’s license Number:** Enter Client’s driver’s license number or “Z0”, “Z2”, “Z4”.
- **Driver’s license State:** Enter Client’s driver’s license state or “Z0”, “Z2”, “Z4”.

Client Address Insert													
Client Number: XXXXXXXXXX		Effective Date: 05/26/87											
Reporting Unit: XXXXXXXXXX													
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 2px;">Street Number:</td> <td style="width: 50%; padding: 2px;">City:</td> </tr> <tr> <td style="padding: 2px;">Direction:</td> <td style="padding: 2px;">State: Zip Code: 00000+0000</td> </tr> <tr> <td style="padding: 2px;">Name:</td> <td style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">Type:</td> <td style="padding: 2px;">Phone Number: () - Ext.:</td> </tr> <tr> <td style="padding: 2px;">Apartment:</td> <td style="padding: 2px;">Census Tract: .</td> </tr> </table>				Street Number:	City:	Direction:	State: Zip Code: 00000+0000	Name:		Type:	Phone Number: () - Ext.:	Apartment:	Census Tract: .
Street Number:	City:												
Direction:	State: Zip Code: 00000+0000												
Name:													
Type:	Phone Number: () - Ext.:												
Apartment:	Census Tract: .												
<div style="border: 1px solid black; height: 1.2em; margin-bottom: 5px;"></div> Bad Address													
County of Responsibility:													
Form Ok Y/N:		Confidential Information USER: SMITH											

Figure 2.7: Client Registration Screen 3

- **Enter Address:** This is not a data field; it is a question. The system is defaulted with “Y”, the system will jump to the Address Screen, described later in this chapter. Once you are done with that screen, the system will return you to the Registration Screen.
- **Enter Significant Other:** This is not a data field; it is a question. The system is defaulted with “N”, the system will jump to the Significant Other Screen when set to “Y”, described later in this chapter. Once you are done with that screen, the system will return you to the Registration Screen.
- **Aliases:** If the client has ever used aliases, enter them here. As you add information, this section of the screen scrolls upward to allow more information to be entered. You may enter up to six aliases via the Client Registration Screen, and enter more through the Client Maintenance screen if necessary.

Error Messages

If there is a Social Security Number in the system that is the same as the one you just entered, it displays an error message and it does not let you continue. If you're sure that the number you have entered is correct refer the case to your supervisor.

If there is a client in the system with the same name and birth date you have just entered, it displays an error message and does not let you continue. Refer the case to your supervisor.

If two different clients do have the exact same name and birth date, a supervisor may use the Num Lock-A sequence to override the match, so registration can occur. You cannot override a Social Security Number match.

Maintaining Client Records

To maintain client records:

1. Choose CLIENTS from the Main menu.
2. Choose MANAGEMENT from the Client Maintenance Menu to display the Client Maintenance Screen (Figure 2.8).

3. Use the fields at the top of the screen to identify the client and maintenance type:
- **Client Number:** Enter the number of the client whose record you want.
 - **Maintenance Type:** If the client number is valid, you can enter the Maintenance Type “L” (for Lookup) or “U” (for Update).

Client Maintenance

Client Number: Maintenance Type:

Last:Generation:Birthdate:First: / /Sex:Middle:SSN: 000-00-0000CIN:

Education:Disability:Language:Ethnicity:Hispanic Origin:Marital Status:Family Size:Annual Income:

Other Factors:Service Group:Primary RU:Chart Location:Ref. Staff ID:

Other ID:Local Code:Program Code:Research Item:

Client UR Needed:

AliasesLastFirstMiddle

Form Ok Y/N:Confidential InformationUSER: COHEN_ET

Figure 2.8: Client Maintenance Screen

Client Lookup

If you enter “L”, InSyst displays the Client Lookup Screen (Figure 2.9). This screen only lets you view information, and so it can be used by people who are not authorized to change client information.

Client Look-up

Client Number: 100000055Maintenance Type: LLast Changed: 16-FEB-2006

Last: 99904Generation:Birthdate: 2 / 1 / 1998First: 99902Sex: FMiddle:SSN: 999-99-9999 Z0CIN: 19904467

Education: 10Disability: 000Language: AEthnicity: A B C D EHispanic Origin: 1Marital Status: 1Family Size: 0Annual Income: 0

Other Factors: 0Service Group:Primary RU:Chart Location:Ref. Staff ID: 0

Other ID: 0Local Code:Program Code:Research Item:

Client UR Needed:

AliasesLastFirstMiddle

Continue: ☒Page aliases or continue.Confidential InformationUSER:

Figure 2.9 Client Look-Up screen 1

20

Client Look-up													
Client Number:	10067802												
Reporting Unit:													
<table><tbody><tr><td>Client Birth Name:</td><td></td></tr><tr><td> Last: TEST</td><td>First: ADAM</td></tr><tr><td>Birth place: Z3 SC</td><td>Mother first name: MOM</td></tr><tr><td>Driver's License:</td><td></td></tr><tr><td> Number: 12345678</td><td>State: CA</td></tr><tr><td>SED Effective Date: / /</td><td>SED Expiration Date: / /</td></tr></tbody></table>		Client Birth Name:		Last: TEST	First: ADAM	Birth place: Z3 SC	Mother first name: MOM	Driver's License:		Number: 12345678	State: CA	SED Effective Date: / /	SED Expiration Date: / /
Client Birth Name:													
Last: TEST	First: ADAM												
Birth place: Z3 SC	Mother first name: MOM												
Driver's License:													
Number: 12345678	State: CA												
SED Effective Date: / /	SED Expiration Date: / /												
Continue: <input type="checkbox"/>	Confidential Information												
USER: GILLMAN													

Figure 2.10: Client Look-up Screen 2

If the client has aliases listed, you may use Num Lock key sequences to page through them, as described in the section on “Moving Through Lists” in Chapter 1.

When you are done, enter “Y” to continue looking up more clients, or press Num Lock-S to leave the Maintenance Screen and save the client number, so it is entered automatically in the next screen you use.

Client Update

If you enter “U”, InSyst displays the Client Update Screen (Figure 2.11).

To modify client data:

- 1. Press Tab to move through the fields, and edit them as necessary.
- 2. Tab to the Form OK prompt, and enter “Y” to save the changes, or “N” to discard them.

The data in all these fields was described in the section on the Client Registration Screen, earlier in this chapter. The Client Number cannot be changed.

Client Update

Client Number: 100000055Maintenance Type: ULast Changed: 16-FEB-2006

Last: 99904Generation: CIN: 19904467

First: 99902Birthdate: 2 / 1 / 1998Sex: F

Middle:SSN: 999-99-9999 Z0

Education: 10Disability: 000Language: A

Other Factors:Service Group:Primary RU: 99995

Ethnicity: A B C D EHispanic Origin: 1

Chart Location:Ref. Staff ID: 55555

Marital Status: 1Family Size: 0

Annual Income: 0

Other ID:Local Code:Program Code:Research Item:

Client UR Needed:

AliasesLastFirstMiddle

Form Ok Y/N: ☒Input requiredConfidential InformationUSER: COHEN_ET

Figure 2.11: Client Update Screen

Client Update

Client Number: 10067802Reporting Unit:

Client Birth Name:
Last: TEST
Birth place: Z3 SC
Driver's License:
Number: 12345678
SED Effective Date: / /

First: ADAM
Mother first name: MOM
State: CA
SED Expiration Date: / /

Form Ok Y/N: ☐Input requiredConfidential InformationUSER: GILLMAN

Figure 2.11-2: Client Update Screen 2

The Registration Approved field only applies to systems using centralized registration, and it can only be changed by the Central Registrar. The Client UR Needed field can only be changed by authorized staff.

Aliases cannot be changed, but any user can add new aliases or can delete an alias by entering “D” on its line.

Client Last Name, First Name, Middle Initial, Social Security Number, Birthdate, and Sex can only be changed by a Supervisor. If you are authorized as a supervisor, you can press Num Lock-A to display the Client Update Screen in Supervisor mode (Figure 2.12).

Supervisor Screen Image.

If the client has aliases listed, you may use Num Lock (Gold) -M key sequences to page through them, as described in the section on Moving Through Lists in Chapter 1.

Entering a New Client Address

Any authorized user can enter a new address for a client with an open episode.

INSYST goes directly to this screen when registering a new client.

To enter a new address:

1. Choose ADDRESS from the Client Maintenance Menu to display the Address Maintenance Selection Screen, as described above.
2. Press Num Lock (Gold)-I (I stands for Insert) to display the Client Address Insert Screen
3. Enter data in the following fields:
 - **Client Number:** Enter the number for the client whose address you want to enter. If you are already viewing a list of the client's addresses when you press Num Lock (Gold)-I, the Client Number is entered automatically.
 - **Reporting Unit:** Enter the Reporting Unit Number for the program that has an open episode for the client. The Effective Date of the address you are entering must fall within this episode.
 - **Effective Date:** By default, the Effective Date is today's date. Only Supervisors can alter it.
 - **Street Number:** Enter a street number with up to five (5) digits.
 - **Street Direction:** If the address has one, enter a street direction, such as "N", "NE", "E", "SE", "S", "SW", "W", "and NW".

Client Address Insert																											
Client Number: XXXXXXXXXX		Effective Date: 05/26/87																									
Reporting Unit: XXXXXXXXXX																											
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="padding: 2px;">Street</td> <td colspan="2" style="padding: 2px;">City:</td> </tr> <tr> <td style="padding: 2px;">Number:</td> <td style="padding: 2px;"></td> <td style="padding: 2px;">State:</td> <td style="padding: 2px;">Zip Code: 00000+0000</td> </tr> <tr> <td style="padding: 2px;">Direction:</td> <td style="padding: 2px;"></td> <td colspan="2" style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">Name:</td> <td colspan="3" style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">Type:</td> <td style="padding: 2px;"></td> <td style="padding: 2px;">Phone Number: () - Ext.:</td> <td style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">Apartment:</td> <td style="padding: 2px;"></td> <td style="padding: 2px;">Census Tract:</td> <td style="padding: 2px;">.</td> </tr> </table>				Street		City:		Number:		State:	Zip Code: 00000+0000	Direction:				Name:				Type:		Phone Number: () - Ext.:		Apartment:		Census Tract:	.
Street		City:																									
Number:		State:	Zip Code: 00000+0000																								
Direction:																											
Name:																											
Type:		Phone Number: () - Ext.:																									
Apartment:		Census Tract:	.																								
Bad Address																											
County of Responsibility:																											
Form Ok Y/N:		Confidential Information																									
		USER: SMITH																									

Figure 2.11: Client Address Insert Screen

- **Street Name:** Enter a street name with up to twenty characters. (Do not enter “Street”, “Road”, or other street type here.) Enter “**Homeless**” as a street name if the client is Homeless.
- **Street Type:** Enter an abbreviation for the street type, such as “ST”, “BL”, “RD”, and “AV”.
- **Apartment/Unit/Space #:** Enter up to four characters. Do not enter the symbol “#”, and do not enter a period at the end.
- **City:** Enter a city name with up to twenty characters. Enter a city name even if the client is **Homeless**. Enter the **Zip Code +4** for the **City Hall** of the city where the client indicates they most often sleep (in a shelter or on the street).
- **State:** Enter the two letter abbreviation for the state name.
- **Zip Code:** Enter the Zip Code +4, and the cursor moves to the plus-four digits, which you can enter if available.

The **CITY, STATE AND ZIP CODE** MUST match or the system will NOT ALLOW ENTRY. Another requirement is that ZIP+4 now MUST be INCLUDED in the ZIP CODE. This change is a requirement of the Medi-Cal program and HIPAA was effective January 1, 2012.

**ALL REJECTED SERVICE CLAIMS WILL BE SENT BACK TO THE
PROGRAM FOR ZIP CODE +4 CORRECTIONS.**

- **City** names MUST be spelled correctly or the system will give an error message
- **State** abbreviation must be same as the state which the city is located
- **Zip Code** must be the valid zip code (for the city and state) and include the +4 for the address entered.
- **Homeless:** Enter the **Zip Code +4** for the **City Hall** of the city where the client indicates they most often sleep (in a shelter or on the street).

City Hall +4 Zip: Codes use for Homeless Client Address			
Alameda	94501-4477	Newark	94560-3727
Albany	94706-2226	Oakland	94612-1904
Berkeley	94704-1122	Piedmont	94611-4031
Castro Valley	94546-5878	Pleasanton	94566-7016
Dublin	94568-2658	San Leandro	94577-3729
Emeryville	94608-3517	San Lorenzo	94580-2453
Fremont	94538-1514	Sunol	94586-9509
Hayward	94541-5007	Union City	94587-4452
Livermore	94550-4813		

ZIP CODE +4

The Zip Code +4 can be found on the USPS website:

<http://zip4.usps.com/zip4/welcome.jsp>

Enter the address on the first screen and click submit.

Address is displayed with Zip Code +4 on the second screen.

- **Phone Number:** Enter the telephone number, if available. If you do not want to enter the Area Code, you must type three blank spaces in its place.
 - **Extension:** Enter an extension for the telephone number, if there is one.
 - **County of Responsibility:** If you do not make an entry here, INSYST will use your county's code when it reports to state client data systems. To report to the state that another county is responsible, enter the two-digit county code in this field. (This section is generally used by California Mental Health Programs.)
4. Enter "Y" at the Form OK prompt to validate and save the data.

Maintaining Addresses

The Address Maintenance Selection screen is used to maintain either Client addresses or Account Addresses, the addresses that bills are sent to.

To maintain addresses:

- 1. Choose ADDRESS from the Client Maintenance Menu to display the Address Maintenance Selection Screen, as described above
- 2. Use the fields at the top of the screen to display a list of addresses:
 - **Client Number:** Enter a Client Number to display that client’s addresses.

The screen lists all addresses for the client or account (Figure 2.12), with the most recent listed first.

Address Maintenance Selection

Client Number: 500000006 HOLDEN CRAUFIELD
Account Number:

Effective	Address
21-May-87 9999-5	45 NE TAYLOR RD Apt. 1 SAN FRANCISCO, CA 94124
01-May-87 9999-9	135 E DUCK AV Apt. 202 SAN FRANCISCO, CA 94118
- -	
- -	
- -	

Confidential Information USER: SMITH

2 records displayed. Last page displayed.

Figure 2.12: Address Maintenance Selection Screen

- 3. Move through the list using the methods described in the section on Moving Through Lists in Chapter 1. Select address records to maintain by typing “L” (lookup), “U” (update), or “D” (delete) next to them. When you have finished selecting records, press Return.

Client Address Lookup

If you entered a Client Number and entered “L” next to the address, it is displayed in the Client Address Lookup screen (Figure 2.12). You cannot change the data. Press Return to display the next address, or press “N” and Return to exit.

Client Address Lookup

Client: 500000006 HOLDEN CRAUFIELD
RU: 999905 45 NE TAYLOR RD Apt. 1
SAN FRANCISCO, CA 94124

Effective Date: 05/21/87 Address Stamp: 21-May-87

Street	
Number: 245	City: SAN FRANCISCO
Direction: NE	State: CA Zip Code: 94124+0000
Name: TAYLOR	
Type: RD	Phone Number: (415) 752-3333 Ext.: 0
Apartment: 1	Census Tract: .00

Bad Address

County of Responsibility: 0

Continue: ☒ Confidential Information USER: SMITH

Press <Return> to continue or <N><Return> to exit.

Figure 2.12: Client Address Lookup Screen

Client Address Delete

If you entered a Client Number and entered “D” next to the address, it is displayed in the Client Address Delete screen (Figure 2.13). Enter “Y” at the Delete OK prompt and “Y” again at the CONFIRM prompt to delete the address.

Client Address Delete													
Client: 500000006	HOLDEN CRAUFIELD												
RU: 999905	135 E DUCK AV Apt. 202												
	SAN FRANCISCO, CA 94118												
Effective Date: 05/01/87 Address Stamp: 22-May-87													
<table><tr><td colspan="2">Street</td></tr><tr><td>Number: 135</td><td>City: SAN FRANCISCO</td></tr><tr><td>Direction: E</td><td>State: CA Zip Code: 94118+0000</td></tr><tr><td>Name: DUCK</td><td></td></tr><tr><td>Type: AV</td><td>Phone Number: (415) 752-3333 Ext.: 0</td></tr><tr><td>Apartment: 202</td><td>Census Tract: .00</td></tr></table>		Street		Number: 135	City: SAN FRANCISCO	Direction: E	State: CA Zip Code: 94118+0000	Name: DUCK		Type: AV	Phone Number: (415) 752-3333 Ext.: 0	Apartment: 202	Census Tract: .00
Street													
Number: 135	City: SAN FRANCISCO												
Direction: E	State: CA Zip Code: 94118+0000												
Name: DUCK													
Type: AV	Phone Number: (415) 752-3333 Ext.: 0												
Apartment: 202	Census Tract: .00												
Bad Address													
County of Responsibility: 0													
Delete OK:	Confidential Information USER: SMITH												
Okay to delete this record (Y/N)?													

Figure 2.14: Client Address Delete Screen

Client Address Update

If you entered a Client Number and entered “U” next to the address, it is displayed in the Client Address Update screen (Figure 2.15)

You can change most of its data. However, you cannot change the Client Number, the Reporting Unit, the Effective Date, or the Address Stamp (which shows when the Address was entered). Because you cannot change the Reporting Unit, if the wrong program has been entered for an address, you must delete the record and enter a new one.

Client Address Update													
Client: 500000006	HOLDEN CAUFIELD												
RU: 999905	45 NE TAYLOR RD Apt. 1												
	SAN FRANCISCO, CA 94124												
Effective Date: 05/21/87 Address Stamp: 21-May-87													
<table><tr><td colspan="2">Street</td></tr><tr><td>Number: 245</td><td>City: SAN FRANCISCO</td></tr><tr><td>Direction: NE</td><td>State: CA Zip Code: 94124+0000</td></tr><tr><td>Name: TAYLOR</td><td></td></tr><tr><td>Type: RD</td><td>Phone Number: (415) 752-3333 Ext.: 0</td></tr><tr><td>Apartment: 1</td><td>Census Tract: .00</td></tr></table>		Street		Number: 245	City: SAN FRANCISCO	Direction: NE	State: CA Zip Code: 94124+0000	Name: TAYLOR		Type: RD	Phone Number: (415) 752-3333 Ext.: 0	Apartment: 1	Census Tract: .00
Street													
Number: 245	City: SAN FRANCISCO												
Direction: NE	State: CA Zip Code: 94124+0000												
Name: TAYLOR													
Type: RD	Phone Number: (415) 752-3333 Ext.: 0												
Apartment: 1	Census Tract: .00												
Bad Address													
County of Responsibility: 49													
Continue: Y	Confidential Information												
Successful update. Update total = 1.													
USER: SMITH													

Figure 2.15: Client Address Update Screen

When you have made all changes, press Return. The next record you selected to maintain is displayed. If there are no more selected records, you return to the Address Maintenance Selection Screen.

Chapter 3: Client Episodes

An Episode is a period of treatment for a client at a program. Before you can enter services for a client, there must be an open Episode for the client in the program providing the service.

Opening New Episodes, Substance Abuse Programs

Before services for a client can be entered into the system, an Episode must be opened.

To open an episode for a client:

1. Choose EPISODES from the Main Menu.
2. Choose OPEN from the Episode Maintenance Menu to display Panel 1 of the Episode Opening Screen (Figure 3.1).

Episode Opening			
ADAM	R TEST	CALOMS TEST	
Client Number:	10067802	RU:	99991
Admit Date:	03/14/2017	Coded Remarks	Position
Axis: I:	305.00	CDC Number:	Z0 1-6
Axis: II:	799.9	Veteran:	N 10
Staff:	61794 Referred From: 3	Perinatal	
Admission Status:	1	Case Mgt:	14
Initial Admission:	Y	Indicator 1:	15
Admission Legal Status:	1	Indicator 2:	16
Admission Employment Status:	01	Medi-Cal:	N 17
Number of Children in Household:		CalWORKs	
Number of Children Under 3:		Recipient:	Z1 22
Client Pregnant at Admission:	N	Sub Abuse Trmt:	Z1
Client Homeless at Admission:	1		
Arrests in Last 24 Months:	0		
Special Contract County:	00 Number: 0	CalOMS Zip Code:	94606
ICD10 Pri:	F10.129 Sec: F19.229		
Pri:	Alcohol abuse with intoxication, unspecified		
Sec:	0th psychoactive substance dependence w intoxication, unsp		
Form Ok Y/N:	Y	Confidential Information	USER: GILLMAN
Displaying ICD-10 diagnoses and labels. Press <Return> to continue.			

Figure 3.1: Episode Opening Screen, Panel One

3. Use the fields at the top of this panel to identify the record:
 - **Reporting Unit:** Enter the reporting unit number for your program.
 - **Client Number:** Enter the client number. If necessary, use the Client Locator Screen, described in Chapter 2, to find the correct client number.
4. The system does not let you open an episode, if the client already has an open episode at this reporting unit. After the identifying fields are validated, you enter data in the following fields:
 - **Admit Date:** Enter the admission date. The current date is the default. You cannot enter future dates or

dates when the program is not open.

- **Staff:** Enter the primary staff identification number.
- **Referred From:** Enter the referral code. You can enter a Reporting Unit number, an Agency Code, or a generic code to indicate self or other or a type of local agency. Ask your system manager about these codes.
- **Admission Status:** Enter the client's Admission Status using the codes in Table 3.2. (Categories 2 through 6 are considered Co-Dependents.)

Code	Meaning
1	Substance Abuser
2	Spouse of Substance Abuser
3	Adult Child of Substance Abuser
4	Minor Child of Substance Abuser
5	Parent of Substance Abuser
6	Other Co-Dependent of Substance Abuser

Table 3.2: Admission Status Codes

- **Initial Admission:** If this is the first time the client has ever been to a Substance Abuse program, enter "Y". If this is a transfer from another program, enter "N".
- **Admission Legal Status:** Enter the client's legal status, using the codes in Table 3.3.

Code	Meaning	Code	Meaning
1	Not Applicable	5	Admitted under diversion from any court
2	Under Parole Supervision by CDC	6	Incarcerated
3	On parole from any other jurisdiction	7	Awaiting Trial
4	Post Release Community Service AB109 or On Parole from any federal, state or legal jurisdiction can be used with Referral Code 22	Z4	Unable to answer

Table 3.3: Admission Legal Status Codes

- **Admission Employment Status:** Enter the client's current employment status. Ask your system manager for a list of these codes.
- **Client Pregnant at Admission:** Enter "Y" or "N" to indicate whether the client is pregnant. Enter "N" if the client is male.
- **Current Living Situation (Homeless At Admission):** Enter "1" if Homeless, "2" if Dependent Living, "3" if Independent Living
- **# of Arrests in Last 24 Months:** Enter the number of times the client has been arrested in the last twenty-four months.

- **Special Contract County:** Enter CalOMS Special Contract County or enter “Z2”.
- **Special Contract Number:** Enter the CalOMS Special Contract Number assigned by the state, if applicable or enter “Z2”.
- **Primary and Secondary ICD10 Dx:** Primary and Secondary fields accept valid ICD-10 diagnosis codes (F10-F19)
- **Primary and Secondary ICD10 Dx Descriptions:** The ICD-10 Diagnosis description will auto populate from the Primary (Prim) and Secondary (Sec) ICD-10 diagnosis code value.
- **CDC Number:** Enter the client’s California Department of Correction identification number or enter ”Z0”, “Z1”, “Z2” or “Z4”.
- **Veteran:** Enter “Y” if client is a U.S. veteran, “N” if not or enter “Z0” or “Z4”.
- **Medi-cal Beneficiary:** Enter “Y” if client is Medical Beneficiary, “N” if not or enter “Z4”.
- **CalWORKs Recipient:** Enter “Y” if client is CalWORKs recipient, “N” if not or enter “Z1”.
- **CalWORKs Sub Abuse Treatment:** Enter “Y” if client is undergoing substance abuse treatment under CalWORKs, “N” if not or enter “Z1”.
- **CalOMS Zip Code:**

Enter the current zip code if the client is NOT homeless (Episode Opening Item #12 – Current Living Situation = “2” or “3”).

“00000” if client is homeless (Episode Opening Item # 12 – Current Living Situation = “1”)

“xxxxx” if client declines to state their zip code

“zzzzz” if client is unable to give their zip code (client must be in a Detox Program or Client Registration Item # 8 includes “16 Developmentally Disabled”)

Panel Two (Figure 3.4)

- **# of Prior Admits to any substance abuse treatment program:** Enter a number from 0 to 9. If the client has been admitted to programs more than nine times, enter 9.
- **Medication Prescribed:** Enter the medication prescribed to this client. The codes are 1 = None, 2 = Methadone or LAAM, 3 = Other.
- **Has This Client Used Needles During the Past Year:** If the primary or secondary route of administration is by injection with a frequency of use Used in Past Year, you should answer this “Yes”.
- **Problem - Primary, Secondary, Tertiary:** Enter the Primary, Secondary and Tertiary Problems, using the Substance Problem codes shown on the back of the Episode Opening/Closing/Annual Update forms or enter “Z1” or “Z3” (for Primary and Secondary only). For clients admitted for methadone treatment, the Primary Drug should be 01 or 15. You must use a different code for each problem. Secondary and Tertiary fields may be left blank..

Episode Opening			
TRACY	T	TESCASE	PSP OPT
Client Number:	1000058		RU: 99991
Number of Prior Admits: 2			
Medication Prescribed: 2			
Needles Used Past Yr: Y			
	Primary	Secondary	Tertiary
Problem:	17	2	0
Drug Name:	INHALANT	ALCOHOL	
Route of Admin:	3	2	
Freq of Use:	10	30	
Age First Use:	018	015	
Detox Schedule: A			
Form Ok Y/N: Y	Confidential Information		USER: COHEN_ET

Figure 3.4: Episode Opening Screen, Panel Two

- **Route of Administration - Primary & Secondary:** Enter the method that the client uses to administer the substances entered as Primary and Secondary Problems, using the codes shown in Table 3.5.

Code	Meaning
1	Oral
2	Smoking
3	Inhalant
4	Injection (IV or intramuscular)
5	Other/Unknown

Table 3.5: Route of Administration Codes

- **Frequency of Use:** Primary and Secondary: Enter the frequency of use for the substances. Allowed value 0 – 30 or “Z2”. This field requires leading zeroes.
- **Age of First Use:** Primary & Secondary: Enter the age when the client first used the substances entered as the Primary and Secondary Problem. The age must be at least 5 years. This field requires leading zeroes.
- **Drug Name - Primary, Secondary:** Enter the Primary and Secondary drug name
- **Emergency Methadone Admission:** For Methadone Maintenance clients only, enter “Y” or “N” to indicate whether the client is being admitted as an exemption to methadone regulations. That is, the client would not be eligible for admission under the regular Title 9 criteria which specify a two year history of addiction and 2 prior treatment failures. **(ONLY USED BY METHADONE PROGRAMS)**
- **Detox Schedule:** For Methadone Maintenance clients only, enter a the number, 1 through 4, for the client’s detox schedule, as defined by the program or county. **(ONLY USED BY METHADONE PROGRAMS)**

Note:

For heroin detoxification programs, if a client has been open within 90 days preceding the opening date, the system will display an error message saying “Detox Hold”. Only someone with supervisor authorization for Episodes may override this (by pressing Num Lock-A after entering the reporting unit and client number).

Panel Three (Figure 3.6)

- **Alcohol Frequency:** Enter the number of days the client has used alcohol in the past 30 days. Allowed value is 0 – 30 or “Z2”. This field requires leading zeroes.
- **IV Use:** Enter the number of days in which the client has injected in the past 30 days. Allowed value is 0 – 30 or “Z0”, “Z4”. This field requires leading zeroes.
- **Paid Days Work:** Enter the number of days the client has been paid for working in the past 30 days. Allowed value is 0 – 30 or “Z0”, “Z4”. This field requires leading zeroes.
- **Number of Arrests:** Enter the number of days the client has been arrested in the past 30 days. Allowed value is 0 – 30 or “Z4”. This field requires leading zeroes.
- **Days in Jail:** Enter the number of days the client has been in jail in the past 30 days. Allowed value is 0 – 30 or “Z4”. This field requires leading zeroes.
- **Days in Prison:** Enter the number of days the client has been in prison in the past 30 days. Allowed value is 0 – 30 or “Z4”. This field requires leading zeroes.
- **Days of 12 Steps/Other:** Enter the number of days the client has participated in the following social support activities in the past 30 days.

12 -Step Meetings

Other Self Help Meetings

Religious /Faith Recovery or Self-Help Meetings

Attending Meetings of organizations other than those listed above

Interactions with Family Member and/or Friend Support of Recovery

Allowed value is 0 – 30. This field requires leading zeroes.

- **Days Living with Substance User:** Enter the number of days the client has lived with someone who uses alcohol or drugs in the past 30 days. Allowed value is 0 – 30 or “Z0”, “Z4”. This field requires leading zeroes.
- **Conflict Days with Family:** Enter the number of days the client has had a serious conflicts with family in the past 30 days. Allowed value is 0 – 30 or “Z0”, “Z4”. This field requires leading zeroes.
- **Emergency Room Visits:** Enter the number of days the client has used the emergency room for physical health problem in the past 30 days. Allowed value is 0 – 99 or “Z4”. This field requires leading zeroes.
- **Hospital Overnights:** Enter the number of days in the client has stayed overnight in a hospital for physical health problem in the past 30 days. Allowed value is 0 – 30 or “Z4”. This field requires leading zeroes.
- **Days of Physical Problem:** Enter the number of days in the client has experienced physical health problem in the past 30 days. Allowed value is 0 – 30 or “Z4”. This field requires leading zeroes.
- **Outpatient Emergency Services:** Enter the number of days in the client has received outpatient emergency services for mental health needs in the past 30 days. Allowed value is 0 – 99 or “Z4”. This field requires leading zeroes.
- **Hospital/Psychiatric Facility Visits:** Enter the number of days in the client has stayed form more than 24 hours in a hospital or psychiatric facility for mental health needs in the past 30 days. Allowed value is 0 – 30 or “Z4”. This field requires leading zeroes.

- **Prescribed Medication Taken:** Has the client taken prescribed medication for mental health needs in the past 30 days? Enter Y, N or “Z4”.

Episode Opening

ETTIE	ARNON	PSP OPT
Client Number: 100000055		RU: 99991

In The Last 30 Days:

Alcohol Frequency: 10	Physical Health problem:
IV Use: 03	Emergency Room Visits: 07
Paid Days Work: 25	Hospital Overnights: 05
Number of Arrests: 02	Days Of Physical Problem: 05
Days In Jail: 01	
Days In Prison: 02	Mental Health problem:
Days Of 12 Steps/Other: 14	Outpatient Emergency Svcs: 01
Days Living With Substance User: 03	Hospital/Psychiatric Facility Visits: 01
Conflict Days With Family: 06	Prescribed Medication Taken: Y

Form Ok Y/N: <input checked="" type="checkbox"/>	Confidential Information	USER: COHEN_ET
--	--------------------------	----------------

Figure 3.6 Episode Opening Screen, Panel 3

Panel Four (Figure 3.7)

- **Consent for Future Contact:** Is there a consent form allowing future possible contact signed by the client on file within your agency? Enter Y or N.
- **Treatment Waiting Days:** Enter the number of days the client has been on a waiting list before being admitted to this treatment program. Enter a value between 0 – 999 or “Z1”, “Z4”. This field requires leading zeroes.
- **Enrolled in Job Training:** Is the client currently enrolled in a job training program? Enter Y, N or “Z0”, “Z4”.
- **Enrolled in School:** Is the client currently enrolled in school. Enter Y, N or “Z0”, “Z4”.
- **Diagnosed with Tuberculosis:** Has the client been diagnosed with Tuberculosis? Enter Y, N or “Z0”, “Z4”.
- **Diagnosed with Hepatitis C:** Has the client been diagnosed with Hepatitis C? Enter Y, N or “Z0”, “Z4”.
- **Diagnosed with sexually Transmitted Disease:** Has the client been diagnosed with a sexually transmitted disease? Enter Y, N or “Z0”, “Z4”.
- **Hiv/Aids Tested:** Has the client been tested for HIV/AIDS? Enter Y, N or “Z0”, “Z4”.
- **Hiv/Aids Result:** Does the client have the result of the HIV/AIDS test? Enter Y, N or “Z0”, “Z4”.
- **Prior Mh Diagnosis:** Has the client ever been diagnosed with mental illness? Enter Y, N or “Z1”.

- **Children Aged 17 or Less:** Enter the number of children the client has, aged 17 or less. Allowed value is 0 – 30 or “Z4”. This field requires leading zeroes.
- **Children Aged 5 or Less:** Enter the number of children the client has, aged 5 or less. Allowed value is 0 – 30 or “Z4”. This field requires leading zeroes.
- **Children in CPS Placement:** Enter the number of children the client has who are living with someone else due to child protection court order. Allowed value is 0 – 30 or “Z4”. This field requires leading zeroes.
- **Children in Placement with no Parental Rights:** Enter the number of children the client has who are living with someone else due to child protection court order AND for whom the client’s parental rights have been terminated. Allowed value is 0 – 30 or “Z4”. This field requires leading zeroes.
- **Parolee Services Network:** Enter “Y” if client is a parolee in the Parolee Services Network, “N” if not or enter “Z4”.
- **FOTP Parolee:** Enter “Y” if client is a parolee in the Female Offender Treatment Program, “N” if not or enter “Z4”.
- **FOTP Priority Status:** Enter client’s FOTP Priority Status. Allowed value is 1, 2, 3 or “Z2”, “Z4”.

Episode Opening		
ETTIE	ARNON	PSP OPT
Client Number: 100000044		RU: 99991
Consent For Future Contact : Y		Parolee Services network: Z4
Treatment Waiting Days: 18		FOTP Parolee: Y
Enrolled In Job Training: N		FOTP Priority Status: 3
Enrolled In School : Y		
Diagnosed With Tuberculosis: N		
Diagnosed With Hepatitis C: N		
Diagnosed With Sexually Transmitted Disease: N		
HIV/AIDS Tested: Y		
HIV/AIDS Result: Y		
Prior MH Diagnosis: N		
Children Aged 17 Or Less: 00		
Children Aged 5 Or Less: 00		
Children In CPS Placement: 00		
Children In Placement With No Parental Rights: 00		
Form OK Y/N: <input checked="" type="checkbox"/>	Confidential Information	USER: COHEN_LET

Figure 3.7 Episode Opening Screen, Panel 4

Closing Episodes, Substance Abuse Programs

The Episode Closing screen is similar to the Episode Opening Screen. Instead of Admit Date, it has Discharge Date. Instead of Referred From, it has Referred To. It omits the fields Diagnosis, Arrests and Prior Admits, which are collected at Episode Opening only. It adds fields, such as Client Adherence to Tx Plan, that are only collected at Episode Closing.

To close an episode:

1. Choose EPISODES from the Main Menu.
2. Choose CLOSE from the Episode Maintenance Menu to display the Episode Closing screen (Figure 3.8).

Episode Closing			
Client Number: XXXXXXXXXX		CALOMS TEST RU: 99991	
Administrative Discharge: N			
Discharge Date: / /		Discharge Status:	
Referred To:		Employment Status:	
Client Adherence to Treatment Plan:		Primary Problem:	
Discharge Children in Household:		Primary Route/Freq: /	
Pregnant During TX:		Secondary Problem:	
Pregnancy Termination Reason:		Secondary Route/Freq: /	
Date of Termination: / /		Tertiary Problem:	
Followup on Ref. Prior to Discharge:		00000000011111111112222	
Client Homeless at discharge:		12345678901234567890123	
CalOMS Zip Code:		Remarks:	
Program Goal 1:		2: 3: 4:	
Primary Drug Name:			
Secondary Drug Name:			
Form Ok Y/N:		Confidential Information USER: GILLMAN	
Successful closing. Session total = 1			

Figure 3.8: Episode Closing, Panel 1

3. Use the fields at the top of the screen to identify the Episode:

- **Client Number:** Enter a Client Number.
- **RU:** Enter the Reporting Unit number for the program.

4. The system displays an error message, if it cannot locate an open episode for that client in that program or if you are not authorized to close episodes in that program. If it finds the episode and you can close it, it displays the Admit Date. Enter data in the following fields:

- **Discharge Date:** Enter the discharge date. The current date is the default. You cannot enter a future date or a date before the opening date. Validation against table Discharge_Reason_Master.

- **Referred To:** Enter a Reporting Unit number if the client was discharged to another program, or a specific Agency Code assigned by your system, or a generic code to indicate self or other or a type of local agency. For information on referral codes, contact your system manager.
 - **Discharge Status:** Enter a Discharge Status Code from back of the Episode Opening/Closing/Annual Update forms.
 - **Employment Status:** Enter the two-digit code that represents the client's employment status at discharge. Validation against table `Employment_status_Master`.
 - **Client Adherence to Tx Plan:** Enter "Y" or "N".
 - **Discharge Children in Household:** Enter the number of children living with the client at discharge.
 - **Client Pregnant During Treatment:** Enter "Y" or "N" to indicate whether the client became pregnant while in treatment or enter "Z1". Enter "N" for males.
 - **Pregnancy Termination Reason:** Field not used.
 - **Date of Termination:** Field not used.
 - **Follow-up on Referral Prior to Discharge:** Enter "Y" or "N" to indicate whether the client followed up on a referral prior to discharge.
 - **Primary, Secondary and Tertiary Problems (Admission Status = 1 only):** Update these fields if necessary. See the Episode Opening documentation for valid codes. Validation of Primary and Secondary problems against tables `Primary_Problem_Master` and `Secondary_Problem_Master`.
 - **Program Goals:** This field is defined by each county. Ask your system manager for more information.
5. Enter "Y" at the Form OK prompt to save your entries. If data is invalid, the system displays error messages and returns the cursor to the field that should be corrected.
 6. Episode Closing panel 2 will be displayed now (Figure 3.9). Enter the following data fields:
 - **Alcohol Frequency:** Enter the number of days the client has used alcohol in the past 30 days. Allowed value is 0 – 30 or "Z2".
 - **IV Use:** Enter the number of days in which the client has injected in the past 30 days. Allowed value is 0 – 30 or "Z0", "Z4".
 - **Paid Days Work:** Enter the number of days the client has been paid for working in the past 30 days. Allowed value is 0 – 30 or "Z0", "Z4".
 - **Number of Arrests:** Enter the number of days the client has been arrested in the past 30 days. Allowed value is 0 – 30 or "Z4".
 - **Days in Jail:** Enter the number of days the client has been in jail in the past 30 days. Allowed value is 0 – 30 or "Z4".
 - **Days in Prison:** Enter the number of days the client has been in prison in the past 30 days. Allowed value is 0 – 30 or "Z4".

- **Days of 12 Steps/Other:** Enter the number of days the client has participated in the following social support activities in the past 30 days. Allowed value is 0 – 30.
 12 -Step Meetings
 Other Self Help Meetings
 Religious /Faith Recovery or Self-Help Meetings
 Attending Meetings of organizations other than those listed above
 Interactions with Family Member and/or Friend Support of Recovery
- **Days Living with Substance User:** Enter the number of days the client has lived with someone who uses alcohol or drugs in the past 30 days. Allowed value is 0 – 30 or “Z0”, “Z4”.
- **Conflict Days with Family:** Enter the number of days the client has had a serious conflicts with family in the past 30 days. Allowed value is 0 – 30 or “Z0”, “Z4”.
- **Emergency Room Visits:** Enter the number of days the client has used the emergency room for physical health problem in the past 30 days. Allowed value is 0 – 99 or “Z4”.
- **Hospital Overnights:** Enter the number of days in the client has stayed overnight in a hospital for physical health problem in the past 30 days. Allowed value is 0 – 30 or “Z4”.
- **Days of Physical Problem:** Enter the number of days in the client has experienced physical health problem in the past 30 days. Allowed value is 0 – 30 or “Z4”.
- **Outpatient Emergency Services:** Enter the number of days in the client has received outpatient emergency services for mental health needs in the past 30 days. Allowed value is 0 – 99 or “Z4”.
- **Hospital/Psychiatric Facility Visits:** Enter the number of days in the client has stayed form more than 24 hours in a hospital or psychiatric facility for mental health needs in the past 30 days. Allowed value is 0 – 30 or “Z4”.
- **Prescribed Medication Taken:** Has the client taken prescribed medication for mental health needs in the past 30 days? Enter Y, N or “Z4”.

Episode Closing		
ETTIE	ARNON	PSP OPT
Client Number: 100000055		RU: 99991
In The Last 30 Days:		
Alcohol Frequency: 10	Physical Health problem:	
IV Use: 03	Emergency Room Visits: 07	
Paid Days Work: 25	Hospital Overnights: 05	
Number of Arrests: 02	Days Of Physical Problem: 05	
Days In Jail: 01	Mental Health problem:	
Days In Prison: 02	Outpatient Emergency Svcs: 01	
Days Of 12 Steps/Other: 14	Hospital/Psychiatric Facility Visits: 01	
Days Living With Substance User: 03	Prescribed Medication Taken: Y	
Conflict Days With Family: 06		
Form Ok Y/N: <input checked="" type="checkbox"/>		
Confidential Information		
USER:		

Figure 3.9 Episode closing, Panel 2

7. Enter “Y” at the Form OK prompt to save your entries. (Values “Z0” through “Z4” are converted to 99900 through 99904 before being written into the database). If data is invalid, the system displays error messages and returns the cursor to the field that should be corrected.
8. Episode Closing panel 3 will be displayed now (Figure 3.10). Enter following data fields:
 - **Consent for Future Contact:** Is there a consent form allowing future possible contact signed by the client on file within your agency? Enter Y or N.
 - **Enrolled in Job Training:** Is the client currently enrolled in a job training program? Enter Y, N or “Z0”, “Z4”.
 - **Enrolled in School:** Is the client currently enrolled in school. Enter Y, N or “Z0”, “Z4”.
 - **Hiv/Aids Tested:** Has the client been tested for HIV/AIDS? Enter Y, N or “Z0”, “Z4”.
 - **Hiv/Aids Result:** Does the client have the result of the HIV/AIDS test? Enter Y, N or “Z0”, “Z4”.
 - **Prior Mh Diagnosis:** Has the client ever been diagnosed with mental illness? Enter Y, N or “Z1”.
 - **Children Aged 17 or Less:** Enter the number of children the client has, aged 17 or less. Allowed value is 0 – 30 or “Z4”.
 - **Children Aged 5 or Less:** Enter the number of children the client has, aged 5 or less. Allowed value is 0 – 30 or “Z4”.
 - **Children in CPS Placement:** Enter the number of children the client has who are living with someone else due to child protection court order. Allowed value is 0 – 30 or “Z4”.
 - **Children in Placement with no Parental Rights:** Enter the number of children the client has who are living with someone else due to child protection court order AND for whom the client’s parental rights have been terminated. Allowed value is 0 – 30 or “Z4”.

Episode Closing		
ETTIE ARNON Client Number: 100000055		PSP OPT RU: 99991
Consent For Future Contact : Y Enrolled In Job Training: Y Enrolled In School : N HIV/AIDS Tested: N HIV/AIDS Result: N Prior MH Diagnosis: N Children Aged 17 Or Less: 01 Children Aged 5 Or Less: 02 Children In CPS Placement: 01 Children In Placement With No Parental Rights: 01		
<div style="display: flex; justify-content: space-between;"> Form Ok Y/N: <input checked="" type="checkbox"/> Confidential Information USER: </div>		

Figure 3.10: Episode Closing, Panel 3

Maintaining Episodes, Substance Abuse Programs

To maintain Episode records:

1. Choose EPISODES from the Main Menu.
2. Choose MANAGEMENT from the Episode Maintenance Menu to display the Episode Maintenance Selection screen (Figure 3.11).

Episode Maintenance Selection

Client Number:
 Reporting Unit: -
 CGN Number: -
 Admit Date: / /
 CADDs Number:

Provider Code	Provider Name	Admission Date	Discharge Date	Staff ID	Staff Name

Confidential Information USER: SMITH

Figure 3.11: Episode Maintenance Selection Screen

3. To find Episodes, enter either a client number or CGN number (County Generated Number). To limit the search, you may also enter a reporting unit number or admit date. (Enter a full date, just a month, a month and day, or just a year; if you do not include the year, the system assumes the current year.)
4. The screen displays episodes, open or closed, that match the criteria you entered, listed in chronological order with the most recent first. If there are more records that it can display at one time, page through the list using the Num Lock Keys or Special Function Keys, described in Appendix A and B.
5. Select episodes for maintenance by using the Tab key or the Down Arrow key to move down the list and entering "L" (lookup), "U" (update), or "D" (delete) next to the episodes you want to maintain (Figure 3.12). Then press Return.

Episode Maintenance Selection

Client Number: 73 JOHN BANNING
 Reporting Unit: -
 CGN Number: -
 Admit Date: / /
 CADDs Number:

Provider Code	Provider Name	Admission Date	Discharge Date	Staff ID	Staff Name
U 99822	RES TEST	17-Oct-91		55555	TEST
L 99854	TCADDs - D	15-Oct-91	16-Oct-91	55555	TEST
D 99855	TCADDs - A	01-Oct-91	15-Oct-91	55555	TEST

Confidential Information USER: SMITH

Figure 3.12: Episode Maintenance Selection Screen with Episodes Listed

Episode Lookup

If you entered “L”, the system displays the Episode Look-up Screen, Panel 1 (Figure 3.13), Panel 2 (Figure 3.14) - if Admission Status is 1 – , panel 3 (Figure 3.15) and panel 4 (Figure 3.16). You can view the data for the Episode but cannot change it.

Episode Look-up	
ADAM	TEST
Client Number: 10067802	CALOMS TEST RU: 99991
Admit Date: 8 /12/2010	Discharge Date: / /
Axis: I: 304.20 II: 799.9	Annual Update Date: / / Type:
Staff: 61794 Referred From: 10	Program Goals:
Admission Status: 1	Referred To:
Initial Admission: Y	Discharge Status:
Admission Legal Status: 7	Client Adhered to TX:
Admission Employment Status: 4	Current Legal Status: 7
Admission Children in Household: 0	Discharge Employment Status:
Number of Children Under 3: 0	Discharge Children in Household:
Client Pregnant at Admission: N	Client Pregnant During TX:
Client Homeless: 1/	Termination Reason: Date: / /
Arrests in Last 24 Months: 4	Current Census Tract: .00
Census Tract on Entry: .00	CALOMS Zip Code: 94568/
Spc Contract Cnty: Z2 Number: Z2	Remarks: 0
ICD10 Pri: F14.20 Sec: R69	
Pri: Cocaine dependence, uncomplicated	
Sec: Illness, unspecified	
Continue: <input checked="" type="checkbox"/> Confidential Information	USER: GILLMAN

Figure 3.13: Episode Look-up Screen, Panel One

Episode Look-up																					
ADAM	TEST																				
Client Number: 10067802	CALOMS TEST RU: 99991																				
Number of Prior Admits: 01																					
Medication Prescribed: 01																					
Needles Used Past Yr: N																					
	<table border="1"> <thead> <tr> <th></th> <th>Primary</th> <th>Secondary</th> <th>Tertiary</th> </tr> </thead> <tbody> <tr> <td>Problem:</td> <td>08 /</td> <td>00 /</td> <td>0/</td> </tr> <tr> <td>Route of Admin:</td> <td>03 /</td> <td>Z2 /</td> <td></td> </tr> <tr> <td>Freq of Use:</td> <td>15 /</td> <td>Z2 /</td> <td></td> </tr> <tr> <td>Age First Use:</td> <td>15</td> <td>Z2</td> <td></td> </tr> </tbody> </table>		Primary	Secondary	Tertiary	Problem:	08 /	00 /	0/	Route of Admin:	03 /	Z2 /		Freq of Use:	15 /	Z2 /		Age First Use:	15	Z2	
	Primary	Secondary	Tertiary																		
Problem:	08 /	00 /	0/																		
Route of Admin:	03 /	Z2 /																			
Freq of Use:	15 /	Z2 /																			
Age First Use:	15	Z2																			
Primary Drug Name Adm.:																					
Primary Drug Name Dis.:																					
Second. Drug Name Adm.:																					
Second. Drug Name Dis.:																					
	Testing Schedule: 4																				
Continue: <input checked="" type="checkbox"/> Confidential Information	USER: GILLMAN																				
Press <Return> to continue or <N Return> to process a new client.																					

3.14: Episode Lookup Screen, Panel Two

Most of the data here is taken from the Episode Opening and Closing screens; for explanations see the documentation on these screens earlier in this chapter. This screen may also contain five additional fields, which are used by selected drug programs only:

- **Census:** Census tract numbers are based on client address and cannot be changed. This field is in Panel 1.
- **TAR:** A Treatment Authorization Request number (for detox Medi-Cal clients only). This field is in Panel 2.
- **Pick-up Schedule:** “Y” is displayed next to days of the week when a Methadone Maintenance client is scheduled to pick-up dose(s) at the clinic. This field is in Panel 2.
- **Detox Schedule:** This number (1 - 4) represents the prescribed methadone dosing schedule for a Methadone detox client. This field is in Panel 2.
- **Testing Schedule:** This number (1 - 4) represents urine testing schedule for a Drug client. This field is in Panel 2.

Episode Look-up		
99902	99904	PSP OPT
Client Number: 100000055		RU: 99991
In The Last 30 Days:		
Alcohol Frequency: 01	Physical Health problem:	
IV Use: 01	Emergency Room Visits: 01	
Paid Days Work: 02	Hospital Overnights: 01	
Number of Arrests: 02	Days Of Physical Problem: 01	
Days In Jail: 01	Mental Health problem:	
Days In Prison: 03	Outpatient Emergency Svcs: 01	
Days Of 12 Steps/Other: 02	Hospital/Psychiatric Facility Visits: 01	
Days Living With Substance User: 03	Prescribed Medication Taken: N	
Conflict Days With Family: 01		
Continue: <input checked="" type="checkbox"/> Confidential Information USER: COHEN_ET		
Press <Return> to continue or <N Return> to process a new client.		

Figure 3.15: Episode Lookup Screen, Panel Three

Episode Look-up		
99902	99904	PSP OPT
Client Number: 100000055		RU: 99991
Consent For Future Contact : N	CDC Number: 32241	
Treatment Waiting Days: 020	Veteran: Z4	
Enrolled In Job Training: N	Medi-Cal: Y	
Enrolled In School : Y	CalWORKs Recipient: N	
Diagnosed With Tuberculosis: N	CalWORKs Sub Abuse Trmt: N	
Diagnosed With Hepatitis C: N	Parolee Services network: N	
Diagnosed With Sexually Transmitted Disease: N	FOTP Parolee: N	
HIV/AIDS Tested: N	FOTP Priority Status: 3	
HIV/AIDS Result: N		
Prior MH Diagnosis: N		
Children Aged 17 Or Less: 00		
Children Aged 5 Or Less: 00		
Children In CPS Placement: 00		
Children In Placement With No Parental Rights: 00		
Continue: Y Confidential Information USER: COHEN_ET		
Press <Return> to continue or <N Return> to process a new client.		

Figure 3.16: Episode Lookup Screen, Panel Four

Press Return to display the next record for maintenance, or enter “N” to go back to the Client Episode Maintenance Selection Screen.

Episode Delete

If you entered “D”, the system displays the Episode Deletion Screen (Figure 3.17). If you are authorized, you can enter “Y” at the prompt and enter “Y” again at the confirm prompt to delete the episode. Then press Return to display the next episode selected for maintenance.

If services have been recorded for this Episode, the system displays an error message saying it may not be deleted. Refer these cases to your Supervisor.

Episode Deletion		
99902	99904	PSP OPT
Client Number: 100000055		RU: 99991
Admit Date: 1 /25/2006	Discharge Date: / /	
Staff: 55555	Annual Update Date: 2 /20/2006	
Axis: I: 302.2 II: 799.9	1 2 3 4	
Referred From: 1	Program Goals:	
Admission Status: 1	Referred To:	
Initial Admission: Y	Discharge Status:	
Admission Legal Status: 1	Client Adhered to TX:	
Admission Employment Status: 1	Current Legal Status: 1	
Admission Children in Household: 0	Discharge Employment Status:	
Number of Children Under 3: 0	Discharge Children in Household:	
Client Pregnant at Admission: N	Client Pregnant During TX:	
Client Homeless at Admission: N	Termination Reason:	
Arrests in Last 24 Months: 11	Termination Date: / /	
Census Tract on Entry: .00	Current Census Tract: .00	
Special Contract County: 38	12345678901234567890123	
Special Contract Number: 1131	Remarks: 0 N NN	
Delete OK:	Confidential Information	USER: COHEN_ET
Okay to delete this episode? (Y/N)		

Figure 3.17: Episode Deletion Screen

Episode Update

If you entered “U” and you are authorized to update Episode information for the specified program, the system displays the Episode Update Screen, Panel 1 (Figure 3.18), Panel 2 (Figure 3.19) - if Admission Status is 1 – , panel 3 (Figure 3.20) and panel 4 (Figure 3.21).

Only Supervisors can change Admit Date, Discharge Date and CADDs Form Serial Number (if entered manually).

Episode Update		
99902	99904	PSP OPT
Client Number: 100000055		RU: 99991
Admit Date: 1 /25/2006	Discharge Date: / /	
Staff: 55555	Annual Update Date: 02/20/2006	
Axis: I: 302.2 II: 799.9	1 2 3 4	
Referred From: 1	Program Goals:	
Admission Status: 1	Referred To:	
Initial Admission: Y	Discharge Status:	
Admission Legal Status: 1	Client Adhered to TX:	
Admission Employment Status: 1	Current Legal Status: 1	
Admission Children in Household: 0	Discharge Employment Status:	
Number of Children Under 3: 0	Discharge Children in Household:	
Client Pregnant at Admission: N	Client Pregnant During TX:	
Client Homeless at Admission: N	Termination Reason:	
Arrests in Last 24 Months: 11	Termination Date: / /	
Census Tract on Entry: .00	Current Census Tract: .00	
Special Contract County: 38	12345678901234567890123	
Special Contract Number: 1131	Remarks: 0 N NN	
Form OK: <input checked="" type="checkbox"/>	Confidential Information	USER: COHEN_ET
Input required		

Figure 3.18: Episode Update Screen - Panel One

Most of the data here is taken from the Episode Opening and Closing screens; for explanations see the documentation on these screens earlier in this chapter. This screen may also contains five additional fields, used by selected drug programs only, Census, TAR, Pick-up Schedule, Detox Schedule and Testing Schedule. These are described in the documentation on the Episode Lookup screen, above.

Episode Update			
99902 99904 Client Number: 100000055		PSP OPT RU: 99991	
Number of Prior Admits: 03 Medication Prescribed: 02 Needles Used Past Yr: N			
	Primary	Secondary	Tertiary
Problem:	02 /	17 /	0 /
Drug Name:	ALCOHOL /	INHALANT /	
Route of Admin:	01 /	3 /	
Freq of Use:	01 /	1 /	
Age First Use:	05	05	
<div style="display: flex; justify-content: space-between;"> Form OK: Y Confidential Information USER: COHEN_ET </div>			

Figure 3.19: Episode Update Screen - Panel Two

Episode Update	
ETTIE ARNON Client Number: 100000055	
PSP OPT RU: 99991	
In The Last 30 Days:	
Alcohol Frequency: 10 IV Use: 03 Paid Days Work: 25 Number of Arrests: 02 Days In Jail: 01 Days In Prison: 02 Days Of 12 Steps/Other: 14 Days Living With Substance User: 03 Conflict Days With Family: 06	Physical Health problem: Emergency Room Visits: 07 Hospital Overnights: 05 Days Of Physical Problem: 05 Mental Health problem: Outpatient Emergency Svcs: 01 Hospital/Psychiatric Facility Visits: 01 Prescribed Medication Taken: Y
<div style="display: flex; justify-content: space-between;"> Form OK: <input checked="" type="checkbox"/> Confidential Information USER: COHEN_ET </div>	

Figure 3.20: Episode Update Screen - Panel Three

Episode Update	
99902 99904 Client Number: 100000055	
PSP OPT RU: 99991	
Consent For Future Contact : N Treatment Waiting Days: 020 Enrolled In Job Training: N Enrolled In School : Y Diagnosed With Tuberculosis: N Diagnosed With Hepatitis C: N Diagnosed With Sexually Transmitted Disease: N HIV/AIDS Tested: N HIV/AIDS Result: N Prior MH Diagnosis: N Children Aged 17 Or Less: 00 Children Aged 5 Or Less: 00 Children In CPS Placement: 00 Children In Placement With No Parental Rights: 00	CDC Number: 322411 Veteran: Z4 Medi-Cal: Y CalWORKs Recipient: N CalWORKs Sub Abuse Trmt: N Parolee Services network: N FOTP Parolee: N FOTP Priority Status: 3
<div style="display: flex; justify-content: space-between;"> Form OK: <input checked="" type="checkbox"/> Confidential Information USER: COHEN_ET </div>	

Figure 3.21: Episode Update Screen - Panel Four

CDC number, Veteran, Medi-Cal, CalWORKs Recipient and CalWORKs Sub Abuse Treatment are described in Episode Opening Panel One.

To confirm your entries, press Return to go to the Form OK prompt, and enter “Y”. If you entered any invalid data, the system displays an error message and returns the cursor to the field you must correct.

Episode Update, Supervisor Authorization

Only Supervisors can change episode opening and closing dates, and CADDs Form Serial Numbers (if they have been entered manually). They can also remove Episode delete information and, in effect re-open an episode.

To display the Episode Update Screen in Supervisor mode:

1. Display the Episode Update screen as described above.
2. Press Num Lock-A. The screen title changes to Episode Update Supervisor.

If you have selected a closed episode to update, the cursor will be positioned at a special field available only to supervisors, called Re-open Episode. To remove Episode Closing information and reopen a closed episode, enter “Y” here.

Chapter 4: Direct Services

This chapter covers the different ways to record services provided by programs directly to clients. It ends with a section on substance abuse services, which use some additional data entry screens. All of these screens are on the Service Maintenance Menu.

Before services can be recorded, the client must be registered and there must be an Episode open for the client in the program providing the service on the date being recorded. See Chapter 2 for information on registering clients, and see Chapter 4 for information on opening episodes.

Entering New Direct Services

InSyst gives you based on your User Authorization and Program Site several ways of entering services:

- Single Service Entry for all programs
- Weekly Service Entry for Methadone and Residential Programs
- Multiple Service Entry to enter the same information for a number of services

Multiple Service Entry is most common and can sometimes save you time in data entry.

Single Service Entry

To do single service entry:

1. Choose SERVICES from the Main Menu.
2. Choose SINGLE from the Service Maintenance Menu to display the Single Service Entry Screen (Figure 4.1).

Single Service Entry

Client Number: Service Date: 12/10/2009 RU: [yellow box]

Procedure:

Staff: Staff Duration: : Number in Group: 01

Co-Staff: Location:

Billing Code: Modifier_1: Modifier_2:

EBP/SS: Client Pregnant: N Emergency: N

Form Ok Y/N: Confidential Information USER: COUNTY1

Enter a reporting unit.

Figure 3.1: Single Service Entry Screen

3. Enter data in the following fields:

- **RU:** Enter the reporting unit number for your program and press Return. The system validates the number and displays the program's name.
- **Client Number:** Enter the Client Number. When all the data has been entered, the system will display the name of the client. At that time, review the client name to be sure you are entering services for the correct client.
- **Date:** Enter a date in the format MM/DD/YY. You cannot enter a future date. You must enter a date when the client's episode is open and the program operates.
- **Procedure:** Enter a three-digit procedure code. It must be a valid procedure for the program.
- **Staff:** Enter a staff identification number. The staff number will be validated for authorization to perform the services you are entering.
- **Co-Staff:** If there was co-staff, enter the staff identification number. You may only enter one co-staff in this system.
- **Staff Duration:** Enter the number of hours and minutes this staff person spent in this service. Enter up to twenty-three hours and up to fifty-nine minutes in the two portions of this field. There is a fixed minimum and maximum time for some services.
- **Co-Staff Duration:** If there was co-staff, enter the time they spent on the service, in the same way as Staff Duration.
- **Number in Group:** Enter a number from 1 to 99 indicating how many *clients* were involved in the service. The default is 01, for an individual service. If you are recording group services, enter the number of clients in the group. (For example, if Staff Person A and B have a group with 10 members that met today for 1 hour with all members present, enter 10 here. InSyst will record a service for each client number, with the staff numbers of A and B, the procedure code for a group, a group count of 10, and the time each staff person spent in the service. Each client will be billed correctly for the group service, and each staff person will be credited correctly for the time spent in the service.)
- **Location:** Enter a location code from 1 to 6: 1 = Office, 9 = Residential. The default is 1 for Office.
- **EBP/SS:** Field is not used at this time.
- **Client Pregnant:** Enter "Y" when the client meets the Client Pregnant definition on page 42.
- **Emergency:** Enter "Y" when the client meets the Emergency definition on page 42.

You MUST use location "9" when entering Inpatient Services on the Multiple or Single Entry screens.

4. When you are done, enter "Y" at the Form OK prompt. The system validates the data and displays the client's name. If there are incorrect values in any field, it will display an error message and return the cursor to that field.
5. Once the data is correct, the system will ask for confirmation before saving it. Enter "Y" at the Confirm prompt to save the entry.

After service entry has ended, the cursor returns to the Client Number field. You may enter a new Client Number and Date to continue entering services. If you want to enter services for another reporting unit, press Num Lock-P to move to the RU field.

Special Authorizations for the Single Service Entry Screens

Authorized personnel can use these special features of the Single Service Entry Screen.

- **Late Entry:** Press Num Lock-A once to invoke Late Entry authorization. For example, if data entry for April is closed on May 5, Late Entry authorization lets you enter services after that time.

Note:

LATE ENTRY (Num Lock-A) CANNOT BE USED WITH WEEKLY SCREENS, late services must be entered using the Single or Multiple Entry Screens ONLY.

- **Supervisor:** Press Num Lock-A twice to invoke Supervisor authorization, which lets you override system validations in the Staff, Co-Staff, Group Count, Staff Duration, Co-Staff Duration and Location fields, but not episode boundaries. This is useful for recording unusual services.
- **Supervisor and Late Entry:** Press Num Lock-A three times to invoke both Supervisor and Late Entry authorization.

When entering services in INSYST, an enhanced edit feature will identify possible duplicate services within the same Reporting Unit. The edit feature may determine a possible Medi-Cal duplicate service when claimed to DMH. Consult with providing Clinician to determine the appropriate override code.

The service entry screen will now propose an override code and display the 3 allowable override codes:

- 59 Distinct Procedural Service
- 76 Repeat Procedure by the Same Person
- 77 Repeat Procedure by a Different Person

Weekly Service Entry

Use this screen to enter one week of services at a time for all of the clients in your program. It is used by programs that have one primary procedure code and only one possible unit of time for the service. Residential Programs and certain types of Day Treatment programs are authorized to enter data on a weekly basis rather than a daily basis.

If an episode is open in a Residential or Day Treatment program, the client's name and number are automatically listed in the Weekly Service Entry Screen, after Report PSP 125 is run for the week.

Note:

Programs that use the Weekly Service Entry Screen must use the Reports menu to produce Report PSP125 *each week* before data can be entered. This report creates the data displayed in the Weekly Log Screen, and also produces a paper log with the same data, which can be used for data entry. For more information, see the Reports Manual.

Note:

LATE ENTRY (Num Lock-A) CANNOT BE USED WITH WEEKLY SCREENS, late services must be entered using the Single or Multiple Entry Screens.

To do weekly service entry:

1. Choose SERVICES from the Main Menu.
2. Choose WEEKLY from the Service Maintenance Menu to display the Weekly Service Entry Screen (Figure 4.2).
3. Enter search criteria in the fields at the top of the screen:
 - **Start Date:** Enter the first day of the week in the format MM/DD/YY. Your Operations Staff defines start date options in a Systems Option File. The Start Date must be a Sunday or a Monday. Data entry can be done on the last work day of the week or after the week is past.
 - **RU:** Enter the Reporting Unit Number for your program.

Weekly Service Entry									
Start Date: 03/22/87					RU: 999905 PSP House				
Client Number	Client Name	Procedure							
		Sun	Mon	Tue	Wed	Thu	Fri	Sat	OK
500000060	CAUFIELD, HOLDEN	135	165	165	165	165	165	165	
500000086	DRIBBLE, WALDO (PENDING)								
500000065	FLASH, JACK	165	165	165	165	165	165	165	
500000017	GLASS, BESSIE	165	165	165	165	165	165	165	
500000081	GLASS, WAKER				165	165	165	165	
500000041	GRUMPY, WILLIAM	165	165	165	165	165	165	165	
500000016	HENDERSON, EUGENE	165	165	165	165	000	000	000	
500000074	LEVINSKY, LEON	165	165	165	165	165	165	165	
500000083	MARCH, AUGIE	165	165	165	165	165	165	165	
500000075	MARKER, HARVEY	165	165	165	165	165	165	165	

Form Ok Y/N: Y Confidential Information USER: SMITH
 Please enter services for first 10 clients. More clients may exist.

Figure 4.2: Weekly Service Entry Screen

4. If a valid Start Date and Reporting Unit are entered, the Weekly Service Entry Screen lists all clients open in that program for that week in alphabetical order, ten at a time. For each record in the list, enter data in the following fields:
 - **Procedure Code:** This field displays the default procedure code for the reporting unit. In most cases this is the only procedure code allowed, except for "000" to indicate that no service was given. There are a few programs that also have other Procedure Codes. You may accept one day's procedure code by pressing Tab, or accept a week's procedure codes by pressing Return to move to the end of the line. (When the services records are recorded, they use the default time for the procedure code entered.)
 - **OK:** This field lets you confirm that the information for this client is correct. Enter "W" to Write the services, "S" to Skip the line, or "D" to Drop the client from this Entry Screen. (If you enter "S", all of the services for that client will be skipped. To write some services for the client but not all, enter "000" for the day the client is to be skipped, and enter "W" in the "OK" field.)
5. Enter "Y" at the Form OK prompt to save the data (Figure 4.3). The system validates the data, and if there are any errors, it returns the cursor to the field that must be corrected and displays an error message.
6. If there are more clients in the program, press Return to display the next 10 clients.

The screen lets you record services only for the days the client was open in the program. If a client is opened in the program on Wednesday, the screen will not allow you to enter services for the client for Sunday, Monday, or Tuesday.

If a client’s registration status is pending, this is noted on the screen and you cannot enter services for that client until the registration has been approved. See the Client Maintenance section in Chapter 2 of this User Manual for information on pending registrations.

- **Client Pregnant:** Enter “Y” when the client meets the Client Pregnant definition on page 42.

Client Pregnant- The pregnancy indicator is required when the client is known to the provider to be either pregnant or postpartum. The indicator will be used for adjudicating claims and for statistical purposes, for which the client’s perinatal eligibility is relevant. The “Y” code indicates that the patient is pregnant/postpartum. If the field is not used it means the client is not pregnant/postpartum.

Perinatal Programs Note:

The Single, Multiple and Weekly Service Entry screens have been updated to automatically change the “Client Pregnant” status from “N” to “Y”. The change occurs when you submit the service and displays the following message:

“Client Pregnant is superseded. Enter 'Y' to accept, 'N' to override.”

Enter “Y” to confirm as ALL clients receiving services in a Perinatal Program qualify as being pregnant.

- **Emergency:** Enter “Y” when the client meets the Emergency definition on page 42.

Emergency- This indicator is now required by the State when the service is known to be an emergency by the provider. DMH defines emergency as: The patient requires immediate medical/mental health intervention as a result of severe, life threatening, or potentially disabling conditions. Note: There is no requirement that a service must be provided in a hospital setting to meet the definition of an emergency.

Client Number	Client Name	Staff	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Pr	CI	Em	FI	OK
											N	N		
											N	N		
											N	N		
											N	N		
											N	N		
											N	N		
											N	N		
											N	N		
											N	N		
											N	N		

Figure 4.3: Weekly Service Entry Screen, Service Entry

If you have used “S” to skip all of the services for one or more clients, you can still use the Weekly Service Entry Screen to record those services by leaving the screen and then displaying it again to begin data entry. The clients you originally skipped are listed on the screen.

If you have skipped some services for clients, but not all, those clients will not appear again on the Weekly Service Entry screen for that week. To enter services for them, use the Single Service Entry Screen, described earlier in this chapter.

If you are unsure which services have been recorded and which have not, press Num Lock-S to leave the screen saving the current Reporting Unit Number. Choose SERVICES from the Main Menu, and then choose MANAGEMENT from the Service Maintenance Menu. When the screen prompts you, enter a Client Number and press Return, to display services for that client in the program. Then return to the Weekly Service Entry Screen to continue service entry.

Note:

It is best to use this screen is to enter services weekly. **You must enter services chronologically.** For example, if you need to enter services for the week of Sunday, March 1 through Saturday, March 7th, Wednesday, March 2, and Thursday, March 3, then you must enter services for Tuesday first, then for Wednesday, then for Thursday. If you accidentally enter services for March 3, you cannot use this screen for March 1 and 2; you must use the Single Service Entry Screen.

Multiple Service Entry

The Multiple Service Entry Screen makes it easy to enter repetitive data—for example, to enter a number of services for one client or one staff person, or to enter all of one type of service for a day. It lets you create user-defined defaults that enter the repetitive data automatically.

To do multiple service entry:

- 1. Choose SERVICES from the Main Menu.
- 2. Choose MULTIPLE from the Service Maintenance Menu to display the Multiple Service Entry screen (Figure 4.4). This screen resembles the Single Service Entry screen.

Client	Service Date	Proc Staff Dur	Co Staff	L	Grp c Pr FI
				o CI Em	

Figure 4.4: Multiple Service Entry Screen

3. To identify the program you are doing data entry for, enter:
 - **Reporting Unit:** Enter the Reporting Unit Number for the program, and the screen displays its name. (To enter services for a different program during the same session, press Num Lock-P to move the cursor back the RU field, or press Num Lock-R to restart the screen.)
4. The cursor moves to the Defaults box (Figure 4.5). Data you enter here will be repeated for every service you enter in the list below, until you enter new defaults. You can enter default data for one or more of the following fields:

The screenshot shows a terminal window titled "Multiple Service Entry". At the top right, it displays "RU: 99991 WEST MHS". Below this is a table with columns: Client, Service Date, Proc, Staff, Dur, Co Staff, Dur, Grp, and L o c. The "Defaults" section is highlighted with a dashed box. Inside, the "Service Date" is set to "12/10/2009", and the "Grp" is set to "1". Below the table, there is a prompt "EBP/SS:" and a "Form OK Y/N:" field. At the bottom, it says "Confidential Information" and "User: COUNTY1".

Client	Service Date	Proc	Staff	Dur	Co Staff	Dur	Grp	L o c
	12/10/2009						1	1
	/ /							
	/ /							
	/ /							
	/ /							
	/ /							

EBP/SS:
Form OK Y/N: Confidential Information User: COUNTY1

Figure 4.5: Multiple Service Entry Screen, Entering Defaults

- **Client Number:** Enter a client number.
 - **Service Date:** Enter a date in the format MM/DD/YY.
 - **Procedure:** Enter a three-digit procedure code. The field accepts only direct service procedure codes that are valid for your program.
 - **Staff:** Enter a staff identification number. It will be validated for authorization to perform the services you enter.
 - **Duration:** Enter the number of hours (up to 23) and minutes (up to 59) the staff person spent in this service. Counties set fixed time ranges for some services.
 - **Co-Staff:** Enter the Co-staff identification number, if there is one. It will also be validated for authorization to perform the services you enter. (Your screen may not include this column.)
 - **Number in Group:** Enter a number from 1 to 99 indicating how many *clients* were involved in the service. The default is "01" for an individual session.
 - **Location:** Enter the location code, from the following options: 1 = Office, 9= Residential. Use the location where the most basic component of the service occurred. The default is "1" for office.
5. After you have entered defaults, enter "Y" at the Form OK prompt. The system validates data and prompts you to correct any errors.

Note:

LATE ENTRY (Num Lock-A) CANNOT BE USED WITH THE WEEKLY SCREENS, late services must be entered using the Single or Multiple Entry Screens ONLY.

You MUST use location “9” entering Residential Services on the Multiple or Single Entry screens.

6. Now, you can use the defaults to enter up to 20 services using the default information. The information you entered in the default box is displayed automatically as you enter data in the screen’s service entry lines. You can modify the default data, if necessary, or just press Tab to accept the default value and move to the next field. At the end of each line you want to save, you must enter “W” to write the service.
7. When you are done entering service data, press Return to move to the Form OK prompt and enter “Y” to accept the data. After the system validates the data, enter “Y” at the Confirm prompt to save the data.

The screen is cleared and the cursor moves back to the defaults line, so you can enter additional services or change the defaults.

You can imagine how useful this screen would be, for example, if you had to enter the same service for a client for a large number of service dates. You could just change the date and accept the defaults for all the other fields.

Perinatal Programs Note:

The Single, Multiple and Weekly Service Entry screens have been updated to automatically change the “Client Pregnant” status from “N” to “Y”. The change occurs when you submit the service and displays the following message:

“Client Pregnant is superseded. Enter 'Y' to accept, 'N' to override.”

Enter “Y” to confirm as ALL clients receiving services in a Perinatal Program qualify as being pregnant.

Maintaining Direct Services

To maintain direct services:

1. Choose SERVICES from the Main Menu.
2. Choose MANAGEMENT from the Service Maintenance Menu to display the Service Maintenance Selection Screen (Figure 4.6).
3. To display a list of services, enter:
 - **Client Number:** You must enter the number of the client who received the services.
 - **Reporting Unit:** To narrow the search, you may also enter a Reporting Unit number.
 - **Service Date:** To narrow the search, you may also enter a complete date or a partial date that is just a month or year. If you leave out the year, the system uses the current year.

Service Maintenance Selection

Client Number: [REDACTED]

Reporting Unit:

Service Date: / /

Service Date	Reporting Unit	Procedure	Therapist	Time HH:MM	Service Cost
-	-				
-	-				
-	-				
-	-				
-	-				
-	-				

Confidential Information

USER: SMITH

Figure 4.6: Service Maintenance Selection Screen

4. The Screen displays the Client Name and all the services for the client that match the criteria entered, listed with the most recent services first (Figure 4.7). Move through the list using the methods described in the section on Moving Through Lists in Chapter 1. Enter “L” (lookup) or “D” (delete) next to the services you want to maintain (Figure 4.8).

Services are NEVER updated, only DELETED and re-entered. We have found that services that are updated don’t bill correctly which could impact your revenue.

Service Maintenance Selection

Client Number: 500000045

JERSEY

GLASS

Reporting Unit:

Service Date: / /

Service Date	Reporting Unit	Procedure	Therapist	Time HH:MM	Service Cost
31-Mar-87	PSP Crisis	999984 CRISIS	370 GORODEZKY	03:00	75.00
27-Mar-87	PSP Clinic	999989 INDIVIDUAL	340 KOSINSKY	01:00	50.00
26-Mar-87	PSP Clinic	999989 INDIVIDUAL	340 KOSINSKY	01:00	50.00
25-Mar-87	PSP Clinic	999989 INDIVIDUAL	340 KOSINSKY	01:00	50.00
22-Mar-87	PSP Crisis	999984 CRISIS	370 SMITH	03:00	75.00
19-Mar-87	PSP Clinic	999989 INDIVIDUAL	340 GORODEZKY	02:00	50.00

6 services displayed.

Confidential Information

USER: SMITH

Figure 4.7: Service Maintenance Selection Screen with Services Listed

5. You may select up to 24 services. When you are done, press Return to display them for maintenance.

Service Maintenance Selection

Client Number: 500000045 JERSEY GLASS
 Reporting Unit:
 Service Date: / /

Service Date	Reporting Unit	Procedure	Therapist	Time HH:MM	Service Cost
U 31-Mar-87	PSP Crisis	999904 CRISIS	370 GORODEZKY	03:00	75.00
L 27-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 KOSINSKY	01:00	50.00
D 26-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 KOSINSKY	01:00	50.00
25-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 KOSINSKY	01:00	50.00
22-Mar-87	PSP Crisis	999904 CRISIS	370 SMITH	03:00	75.00
19-Mar-87	PSP Clinic	999909 INDIVIDUAL	340 GORODEZKY	02:00	50.00

Confidential Information USER: SMITH

6 services displayed.

Figure 4.8: Service Maintenance Selection Screen, Selecting Services for Maintenance

Note:

Num Lock (Gold)-A: (Unlimited or Continuous Paging) Allows the user to speed up performance as maintenance screens usually include only two pages of information by default. If you have to see more items than this, you should request unlimited paging by pressing Num Lock (Gold)-A before you display the list

Direct Service Lookup

If you entered "L" next to a service, it is displayed in the Service Look-up screen (Figure 4.9). The data cannot be changed.

Service Look-up

JERSEY GLASS
 Client: 500000045 RU: 999909

Last Changed: 03-Apr-87 Cost: \$50.00 Service Stamp: 26-MAR-87

Service Date: 03/26/87		Procedure: 340 INDIVIDUAL	
Staff: 99999	Staff Duration: 1 :0	Number in Group: 1	
Co-Staff: 0	Co-Staff Duration:	Location: 1	

Continue: Y Confidential Information USER: SMITH
 Press <Return> to continue or <N><Return> to process a new records.

Figure 4.9: Service Look-up Screen

In addition to the data in the Service Maintenance selection screen, this screen displays:

- **Last Changed:** The date that the displayed record was last modified by a user or system program.

- **Cost:** The amount charged for the displayed service.
- **Service Stamp:** The date that the service was originally entered into the system.

Press Return to display the next record selected in the Service Maintenance Selection Screen. Type “N” and press Return to go back to the Service Maintenance Selection Screen.

Direct Service Delete

If you entered “D” next to a service, it is displayed in the Service Delete Screen (Figure 4.10). If you are authorized, you can enter “Y” at the Delete OK prompt and “Y” again at the confirm prompt to delete the service.

Service Delete											
JERSEY GLASS											
Client: 500000045		RU: 999909									
Last Changed: 03-Apr-87	Cost: \$50.00	Service Stamp: 26-MAR-87									
<table><tr><td colspan="2">Service Date: 03/26/87</td><td>Procedure: 340 INDIVIDUAL</td></tr><tr><td>Staff: 99999</td><td>Staff Duration: 1 :0</td><td>Number in Group: 1</td></tr><tr><td>Co-Staff: 0</td><td>Co-Staff Duration:</td><td>Location: 1</td></tr></table>			Service Date: 03/26/87		Procedure: 340 INDIVIDUAL	Staff: 99999	Staff Duration: 1 :0	Number in Group: 1	Co-Staff: 0	Co-Staff Duration:	Location: 1
Service Date: 03/26/87		Procedure: 340 INDIVIDUAL									
Staff: 99999	Staff Duration: 1 :0	Number in Group: 1									
Co-Staff: 0	Co-Staff Duration:	Location: 1									
Confirm: █	Confidential Information	USER: SMITH									
Are you sure you want to delete this service? (Y/N)											

Figure 4.10: Service Delete Screen

If a service has been posted in the billing system, the service may not be deleted unless you have the correct authorization. If this occurs, tell your supervisor.

Late Entry, and Supervisor Authorization

Late Entry and Supervisor Authorization are available in all three of the Maintenance Screens.

In the Update screen (Figure 4.11), Supervisor Authorization lets you change Service Date and Procedure.

Service Update Supervisor		
JERSEY GLASS Client: 500000045		RU: 999909
Last Changed: 01-Apr-87 Cost: \$50.00 Service Stamp: 1-Apr-87 19:59:59.77		
Service Date: 03/18/87		Procedure: 350 GROUP
Staff: 99994	Staff Duration: 3:0	Number in Group: 8
Co-Staff: 99996	Co-Staff Duration: 3:0	Location: 1
Service/Client Acct: 101001/535087		Original FRC: 31
Posting Status: 5	Potent FRC: 31	Clearances: 0
UR Status: 0	Tried FRC: 0	Screen Source: 1
UR Posted:	Actual FRC: 0	CDS Date: 17-NOV-58
Contact UID:	Episode Stamp: 3/31/87 09:13:59.35	
Form OK:	Confidential Information	USER: SMITH
Supervisor authorization in effect.		

Figure 4.11: Service Update Screen, Supervisor Mode

In the Lookup and Update Screens, Supervisor Authorization lets you view these additional Fields

- **Posting Status:** The service status within the billing system.

Original FRC: All Payor sources (Medicaid, Medicare, County, Insurance, Patient) that can be billed for this type of service in your system.

- **Potential FRC:** All Payor sources (Medicaid, Medicare, County, Insurance, Patient) that can be billed for this particular service.
- **Tried FRC:** Payor sources (Medicaid, Medicare, County, Insurance, and Patient) that you have tried to bill for the service.
- **Actual FRC:** Payor sources (Medicaid, Medicare, Short-Doyle, Insurance, Patient) that have actually been billed for the service.
- **Episode Stamp:** The Episode to which the Service is attached. Episodes can be positively identified by their Key Entry Date which is referred to here as Episode Stamp.
- **Clearances:** The Clearances Flagword in the database. This code will identify which systems have processed this service (POSTING, BILLING, CDS, UR, POE).
- **Screen Source:** The screen used to enter the service.

In the Delete Screen, the Supervisor Authorization lets you delete a service that has been posted by the billing system. In this case, the Delete Screen deletes the service and also writes an adjustment to the client's account. Supervisor Authorization alone does not allow you to delete a service that has been claimed to a payor source: you must also have additional authorization.

To use late entry and Supervisor authorization:

1. Display the Service Lookup, Delete or Update screen.
2. Press Num Lock-A to display the screen in Late Entry mode, to enter data for a time period whose deadline has passed.
3. Press Num Lock-A a second time to display the screen in Supervisor mode.
4. Press Num Lock-A a third time to display the screen in both Supervisor and Late Entry mode.

Chapter 5: Reports

Reports available are based on your User Authorizations and Program Site. The main two types of Reports available are Caseload and Service.

To run a report:

1. Choose REPORTS from the Main Menu
2. Choose one of the submenu options of the Report Menu (Figure 17.1). As you can see, this menu lets you choose submenus with reports that are used for different purposes.

Selection	Description
ACCOUNT	Account Reports
CASELOAD	Caseload Reports
CLINICAL	Clinical Reports
INSURANCE	Insurance Reports
OPERATIONS	Special Reports For Operations
REVENUE	Revenue Reports
SERVICE	Service Reports

Figure 17.1: A Typical Report Menu

3. Choose the report from the submenu.

Your local Operations Staff controls how these submenus are organized, and you should ask them which menus you should have and where specific reports are.

The standard InSyst package includes these submenus for reports:

- **Caseload Reports:** contains reports on the management of the workload at the clinic level: staff caseload reports, clinic caseload reports, productivity reports, etc.
- **Service Reports:** contains staff productivity, service audit and program productivity reports.

Running Reports

Once you select a report from one of the Reports Menu, you may be prompted for information needed to produce the report. First the system will ask you questions about when the report will be created, or where the report will be printed. After that, it will ask you questions that control the content of the report, such as client number, reporting unit number, or date range that it will report on.

The following example (Figure 17.2) shows the dialogue similar to what you may see on the screen when you produce a report. The symbol <RETURN> means that pressing Return will accept the default answer to the question.

```

REPORT_PSP118
This report may only be run in "BATCH" mode
Specify when the report generation should start up:
time    = hold until specified date/time (DD-MMM-YYYY:HH:MM)
<RETURN> = start up immediately
?
Specify print destination
NOPRINT  = do not print report (save as disk file)
queue name = name of printer queue (e.g.. COMMON)
<RETURN>  = print on the default printer: pq_myprinter
?
Specify number of copies
number   = number of times to print this report
<RETURN> = 1 copy
?
Specify print setup/form
examples:
CONDENSE = print 132 columns on 80 column paper
DRAFT    = print in normal 'FAST' mode
LETTER   = print in slower 'LETTER QUALITY' mode
<RETURN> = print using the default
?
Send mail notification when report has completed?:
YES/NO   = send mail/do not send mail
<RETURN> = do not send mail
?
Parameters selected:
Send to batch (release terminal)
, start report generation immediately
, use printer: CHANATE
, print 1 copy of report
, default printer form/setup
, no mail notification
OK to continue? <Y/N> Y
Enter Case Number for Episode History Report
? 10000015
Submitting report REPORT_PSP118 to run in batch mode on REPORT_MHS$BATCH
Job REPORT_PSP118 SMITH (queue REPORT_MHS$BATCH, entry 1) started on REPORT_MHS$BATCH
Jobname  Username  Entry  Blocks  Status
-----
REPORT_PSP118 SMITH
          SP_SNMHS_RPT  1      Executing
          On batch queue REPORT_MHS$BATCH
***** all done *****
press <RETURN> to return to Menu

```

Figure 17.2: Sample Report Dialogue

Note: You can terminate your report request at any time by typing Control/Z. The report dialogue will terminate itself if you do not respond after a short time.

After you finished the dialog, the system displays all the options you have chosen and displays the prompt: OK to continue. Enter “Y” to produce the report, or if an option is incorrect, enter “N” to use the dialog again.

Report Dialog Questions

This section explains some questions the system may ask you. Which questions are displayed depends on the report and your level of authorization. Here is an explanation of some questions commonly used in dialogs.

Specify when the report generation should start up:

Enter a date and time, such as 19-SEP-1997:18 (September 19th at 6:00 PM), or just a time, such as 19 (today at 7:00 PM).

Some reports can be run at any time during the day. Some reports that use system resources heavily, can only be run in the evening or weekends. If you try to run a report immediately, the system may display a message with the times you can run the report.

Automatically distribute reports to program printers?:

Some reports are automatically sent to the correct printer for each reporting unit. Instead of the printer section of the dialogue show above, the dialog might say:

Automatically distribute reports to program printers?:
YES/NO = distribute reports/do not distribute reports
<RETURN> = distribute reports
?

If you select this option, the system will send the needed version of the report to the printer for each reporting unit.

Specify print destination

Enter a printer name. If the report is set up to print at the printer assigned to the person requesting it, this printer's name will be displayed as the default. If the report is set up to print at a specific printer, this question is not asked.

Specify number of copies

Enter a number to print more than one copy of the report.

Send mail notification when report has completed?:

Enter Yes to have the system send you e-mail message when the report is completed and ready for printing. Because you generally are only notified of mail messages when you log on, this option may not be effective for most users.

Enter the Reporting Unit Number for your program

Enter the six digit reporting unit number for your program reporting units. Never enter “*” as this will request the report for **EVERY** reporting unit in the County.

Enter a starting date for the report

For service and productivity reports, you enter a date range. At this prompt, enter the first day of the range.

Enter an ending date for the report

For service and productivity reports, you enter a date range. At this prompt, enter the last day of the range.

Enter a client number

For client oriented reports, enter the client number.

Report PSP 121

Program Caseload Report

Report Description:

This report lists all the clients with open cases for each reporting unit. It includes client number, name, opening date, age, primary diagnosis, and primary staff.

Running the Report:

Operations Staff runs this report monthly or more frequently if needed. It is routed to each Reporting Unit's printer. If you do not receive this report, contact local Operations Staff.

Users can also run this report using the Report menu.

It prompts you to enter a Reporting Unit (or enter "*" for all units) and to enter a target date. The report finds all clients open on the target date.

Using the Report:

The report is used as a management tool by program managers, to balance the work among staff or to quickly review the types of client being served. It is also used to direct the distribution of other reports, such as the Utilization Review reports.

The report might also show that it is necessary to improve the data entry process. Any duplicate clients should be reported to Operations Staff.

Output File:

MHS_OUTPUT_REPORT:

PROGRAM_CASELOAD_PSP121.*****_LIS

Program Caseload

2-Aug-2017
Page 1

Report PSP121

Day Treatment - Oakland (99433)

Cases active as of: 2-Aug-2017

Client Name	Client Number	Opening Date	A G E	PrmDX / ICD10	Primary Staff	Last Svc
SHEILA A_CLIENT	90200122	7/24/92	21	305.2 / F12.10	ANDERSON	6/11/17
PHILLIP B_CLIENT	90200192	12/01/86	21	/ F12.10	ARGOUNT	6/29/17
JAMES C_CLIENT	90000015	7/01/92	26	305.2 / F12.10	ARGOUNT	
MICHAEL D_CLIENT	90000001	9/01/92	31	305.2 / F12.10	ANDERSON	6/29/17
MAXINE CLIENT	95700048	9/11/92	28	/ F12.10	ANDERSON	6/27/17
IRENE CLIENT	90000045	9/01/92	22	/ F12.10	ANDERSON	6/26/17
BERNADETTE CLIENT	91900031	9/01/86	38	305.2 / F12.10	ARGOUNT	
ANDREW CLIENT	90000070	9/24/92	55	305.2 / F12.10	ANDERSON	
MIKE CLIENT	02390198	7/10/92	22	/ F12.10	ARGOUNT	6/28/17
JOSEPH CLIENT	00390027	4/10/86	57	305.2 / F12.10	ARGOUNT	6/30/17

TOTAL OPEN CASES FOR Day Treatment 39

 Confidential Information

Report PSP 131

Reporting Unit Service Summary by Provider

Report Description:

This report shows the total services by type for the specified reporting unit during the specified time period.

Running the Report:

Use the Report menu to run this report as needed. You are prompted to enter the reporting unit, time period, and printer. Enter Reporting Unit number.

Using the Report:

Use this report as a planning tool, to audit service entry and program productivity. .

Output File:

MHS_OUTPUT_REPORT:

RU_SERVICE_SUMMARY_PSP131.*****_LIS

REPORT_PSP131_FILE.LIS

Service Summary
Direct and Indirect Services

18-Aug-2017
Page 1

Report PSP131
Reporting Period: From 1-Mar-2017 to 31-Mar-2017

Service Site	Service Total	Total Hours
WESTSIDE OUTPATIENT (99991)		
311 COLLATERAL	3	3.00
343 IND NON-MC	60	60.00
351 GROUP	46	69.00
355 T PLANNING	3	3.00
356 D PLANNING	1	1.00
411 FAMCT ADOL	173	86.50
441 CHKIN ADOL	175	87.50
451 MFAM ADOL	9	13.50
555 INTAKE	8	8.00
571 CASE MGMT	203	101.50
701 IND VISIT	15	15.00
709 GRP VISIT	47	70.50
Sub Total for Direct Services	743	518.50
Total Services for 99991	743	518.50

Confidential Information

Report PSP 125

WEEKLY LOG CLEANUP REPORT

Weekly Attendance Log

Report Description:

Weekly Log Records 14 Days or Older Which Have Been Skipped

Please evaluate these records, and enter services or drop records as needed. Clients appearing on this report have been skipped using the Weekly Service Entry Screen. If necessary, clients should be given services using the Weekly Service Entry Screen or the Single Service Entry Screen. These records will be deleted after one month. If the clients should not continue to appear on the Weekly Service Entry Screen, they should be dropped or their episodes closed.

Output File:

MHS_OUTPUT_REPORT:
WEEKLY_LOG_CLEANUP_PSP125.*****_LIS

Weekly Log Records 14 Days or Older Which Have Been Skipped

18-Aug-2017

Page 1

REPORT MHS 125B

Please evaluate these records, and enter services or drop records as needed. Clients appearing on this report have been skipped using the Weekly Service Entry Screen. If necessary, clients should be given services using the Weekly Service Entry Screen or the Single Service Entry Screen. These records will be deleted after one month. If the clients should not continue to appear on the Weekly Service Entry Screen, they should be dropped or their episodes closed.

NEW BRIDGE RES. COUNTY (99991)

Client Name		Client Number	Sun Date	Status
TEST	CASE I	01111111	25-Jun-2017	Skipped
TEST	CASE II	09999999	2-Jul-2017	Skipped

Confidential Information

Chapter 6: Utilities

Use the Utilities Menu to manage the **printer queue**, and maintain your logon password.

Passwords

When you log on to the computer system, you must enter your Username and your Password. Passwords are vital to system security. Passwords expire every sixty days. Two or three days earlier, you will receive warnings that your Password is about to expire.

To change your Password:

1. Choose UTILITIES from the Main Menu.
2. Choose PASSWORD from the Utilities Menu to display the Password Menu. This has only two options: Primary Password and Secondary Password.

You may have only one password, the Primary Password. Only change your Primary Password.

To change your Primary Password:

1. Choose PASSWORD from the Utilities Menu.
2. Choose Primary Password from the Password Menu.
3. The system displays the prompt: **CHANGE PRIMARY LOGON PASSWORD Allow system to generate a password?**
<yes>: If you enter “Yes” or press Return, the system will ask you for your old password and then displays a list of nonsense words. You can use one of these options as your password or ask the system to generate another list of words. If you enter “No”, the system lets you enter your own new password later.
4. The system displays the prompt: **Old Password:** Enter your current Password.
5. The system displays the prompt: **New Password:** Enter your new password.
6. The system displays the prompt: **Verification:** Re-type your new password. If this is not the same as the new password you entered originally, the system displays the message “password verification error”, and returns you to the previous menu. To change your password, you must start again.

Passwords that you type are not displayed on the screen. After you change your password successfully, you are returned to the previous menu with no message.

To exit, type Control/Z at any time.

Printer and Queue Management

A **printer queue** is a software holding place for reports.

The Department assigns a name to the printer attached to your logon/program site, such as PQ1_CHILDRENS, or SONOMA. The **queue** refers to the waiting line for the printer. If there are no items to be printed, the queue is empty. When a report is requested it is sent to your printer queue. When you start your queue, it send output to your default printer.

The Printer and Queue Management menu lets you manage print jobs.

Show Queue

To view the printer queue:

1. Choose UTILITIES from the Main Menu.
2. Choose PRINTER from the Utility Menu.
3. Choose SHOW from the Printer and Queue Management Menu to display the Show Queue Screen.
4. Use the field at the top to identify the queue:
 - **Queue Name:** Enter the name of a print queue, or press Return to select your print queue. The screen lists all the jobs waiting in your queue to be printed, in the order that they will be printed. (Figure 6.0).
5. After viewing the Queue, press Return to go back to the Printer and Queue Management Menu.

The statuses of jobs in the queue are:

- **Pending:** a job waiting to be printed.
- **Holding:** a job put on hold, or delayed. In some cases, a time can be associated with this status, e.g. "holding until 15-Jun-1987 02:00".
- **Printing:** a job now printing.
- **Paused:** a job delayed in the midst of printing.
- **Aborted:** a job deleted in the midst of printing.

Queues Utility

Show Queue

Queue Name: PQ_SUNSET

Terminal queue PRINT_TXA0, stopped, on TXA0:, mounted form DEFAULT,
 /BASE_PRIORITY=4/DEFAULT=<FEED,FORM=DEFAULT>/LIBRARY=SYSDEVCTL_LA100
 Lowercase/RETAIN=ERROR/SCHEDULE=<NOSIZE>/SEPARATE=<RESET=RESET_CONDENSE>

Jobname	Username	Entry	Status
ACCOUNT_DOCUMENT	SMITH	1642	Pending
- ACMS	SMITH	1643	Pending
- DATABASE_OSCAR	SMITH	1644	Pending
- DX_REPORT	SMITH	1645	Pending
-			
-			

USER: SMITH

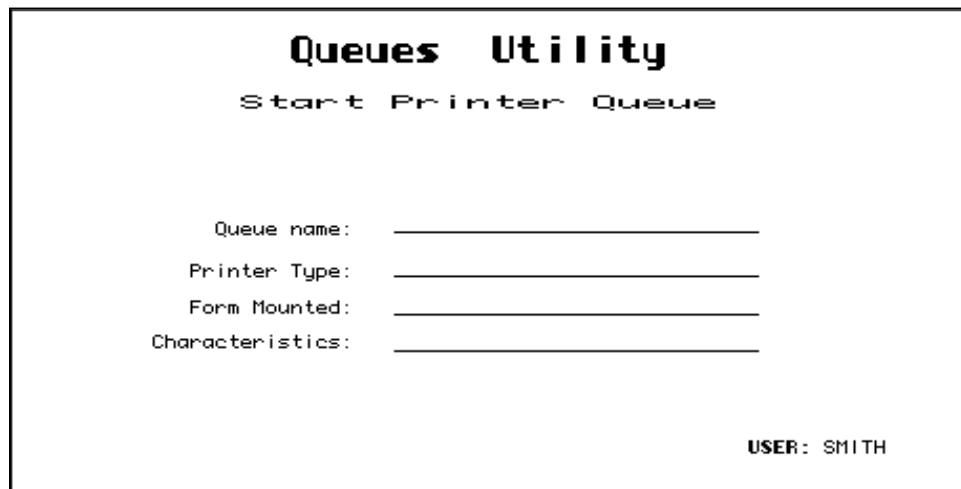
Figure 6.0: Show Queue Screen

Start Printer Queue

Use Start Printer Queue to print everything that waiting to be printed is printed, in the order that it is listed. If there is nothing to be printed, the printer readies itself.

To start the printer queue:

1. Choose UTILITIES from the Main Menu.
2. Choose PRINTER from the Utility Menu.
3. Choose START from the Printer and Queue Management Menu to display the Start Printer Queue screen (Figure 6.1). It has the following fields:



Queues Utility

Start Printer Queue

Queue name: _____

Printer Type: _____

Form Mounted: _____

Characteristics: _____

USER: SMITH

Figure 6.1: Start Printer Queue Screen

- **Queue Name:** To start your printer, enter and press Return.

The system continues printing all jobs on the queue.

To stop the printer:

1. Press the Spacebar key. Do not press Spacebar more than once. Do not turn off your printer. If several people are using the computer system, it can take a couple of minutes to stop printing.
2. After you have stopped the printer, the system displays a message asking what it should do with the current print job. You must choose one of the options within 30 seconds, or the system will continue printing the current job. You have the following options:
 - **Restart:** Restarts the current job at the beginning.
 - **Stop:** Stops the printer. When you start the printer again, the job continues printing.
 - **Wait:** Stops the printer temporarily.
 - **Continue:** Continues printing the current job to continue printing where it left off.

Restarting Stopped Print Jobs

If you use the Stop Command while printing a file, the printer is stopped and you are returned to the menu.

To continue printing that job:

1. Choose START from the Printer and Queue Management Menu.
2. Use the Start Printer Queue screen to start the printer, as described above.
3. The system displays the prompt: Stop before next entry. Press Return to accept the default “N” to print all jobs on the queue, or enter “Y” to print only this job and stop again. The system displays the prompt: Continue printing this entry. Press Return to continue the job.

County/ State Codes

COUNTY CODES

Alameda	01
Alpine	02
Amador	03
Butte	04
Calaveras	05
Colusa	06
Contra Costa	07
Del Norte	08
El Dorado	09
Fresno	10
Glenn	11
Humboldt	12
Imperial	13
Inyo	14
Kern	15
Kings	16
Lake	17
Lassen	18
Los Angeles	19
Madera	20
Marin	21
Mariposa	22
Mendocino	23
Merced	24
Modoc	25
Mono	26
Monterey	27
Napa	28
Nevada	29
Orange	30

Placer	31
Plumas	32
Riverside	33
Sacramento	34
San Benito	35
San Bernardino	36
San Diego	37
San Francisco	38
San Joaquin	39
San Luis Obispo	40
San Mateo	41
Santa Barbara	42
Santa Clara	43
Santa Cruz	44
Shasta	45
Sierra	46
Siskiyou	47
Solano	48
Sonoma	49
Stanislaus	50
Sutter	51
Tehama	52
Trinity	53
Tulare	54
Tuolumne	55
Ventura	56
Yolo	57
Yuba	58
Unknown California County	99
Not California County	00

STATE CODES

Alabama	AL
Alaska	AK
Arizona	AZ
Arkansas	AR
California	CA
Colorado	CO
Connecticut	CT
Delaware	DE
District of Columbia	DC
Florida	FL
Georgia	GA
Hawaii	HI
Idaho	ID
Illinois	IL
Indiana	IN
Iowa	IA
Kansas	KS
Kentucky	KY
Louisiana	LA
Maine	ME
Maryland	MD
Massachusetts	MA
Michigan	MI
Minnesota	MN
Mississippi	MS
Missouri	MO
Montana	MT

Nebraska	NE
Nevada	NV
New Hampshire	NH
New Jersey	NJ
New Mexico	NM
New York	NY
North Carolina	NC
North Dakota	ND
Ohio	OH
Oklahoma	OK
Oregon	OR
Pennsylvania	PA
Rhode Island	RI
South Carolina	SC
South Dakota	SD
Tennessee	TN
Texas	TX
Utah	UT
Vermont	VT
Virginia	VA
Washington	WA
West Virginia	WV
Wisconsin	WI
Wyoming	WY
Unknown State	UN
Not US State	00

COUNTRY CODES

AFGHANISTAN	AF
ALBANIA	AL
ALGERIA	AG
AMERICAN SAMOA	AQ
ANDORRA	AN
ANGOLA	AO
ANGUILLA	AV
ANTARCTICA	AY
ANTIGUA AND BARBUDA	AC
ARGENTINA	AR
ARMENIA	AM
ARUBA ISLANDS	AA
ASHMORE/CARTIER ISLANDS	AT
AUSTRALIA	AS
AUSTRIA	AU
AZERBAIJAN	AJ
BAHAMAS	BF
BAHRAIN	BA
BAKER ISLAND	FQ
BANGLADESH	BG
BARBADOS	BB
BASSAS DA INDIA	BS
BELARUS	BO
BELGIUM	BE
BELIZE	BH
BENIN	BN
BERMUDA	BD
BHUTAN	BT
BOLIVIA	BL
BOSNIA/HERZEGOVINA	BK
BOTSWANA	BC
BOUVET ISLAND	BV
BRAZIL	BR
BRITISH INDIAN OCEAN TERRITORY	IO
BRITISH VIRGIN ISLANDS	VI
BRUNEI	BX
BULGARIA	BU
BURKINA	UV
BURMA	BM
BURUNDI	BY

CAMBODIA	CB
CAMEROON	CM
CANADA	CA
CAPE VERDE	CV
CAYMAN ISLANDS	CJ
CENTRAL AFRICAN REPUBLIC	CT
CHAD	CD
CHILE	CI
CHINA	CH
CHRISTMAS ISLAND	KT
CLIPPERTON	IP
COCOS (KEELING) ISLANDS	CK
COLOMBIA	CO
COMOROS	CN
CONGO	CF
COOK ISLANDS	CW
CORAL SEA ISLANDS	CR
COSTA RICA	CS
COTE D'IVOIRE	IV
COUNTRY NOT LISTED	0
CROATIA	HR
CUBA	CU
CYPRUS	CY
CZECH REPUBLIC	EZ
DENMARK	DA
DJIBOUTI	DJ
DOMINICA	DO
DOMINICAN REPUBLIC	DR
ECUADOR	EC
EGYPT	EG
EL SALVADOR	ES
EQUATORIAL GUINEA	EK
ERITREA	ER
ESTONIA	EN
ETHIOPIA	ET
EUROPA ISLAND	EU
FALKLAND ISLANDS/MALVINAS	FK
FAROE ISLANDS	FO
FEDERATED STATES OF MICRONESIA	FM
FIJI	FJ

FINLAND	FI
FRANCE	FR
FRENCH GUIANA	FG
FRENCH POLYNESIA	FP
FRENCH SOUTHERN/ANTARCTIC	FS
GABON	GB
GAMBIA	GA
GAZA STRIP	GZ
GEORGIA	GG
GERMANY	GM
GHANA	GH
GIBRALTAR	GI
GLORIOSO ISLANDS	GO
GREECE	GR
GREENLAND	GL
GRENADA	GJ
GUADELOUPE	GP
GUAM	GQ
GUATEMALA	GT
GUERNSEY	GK
GUINEA	GV
GUINEA-BISSAU	PU
GUYANA	GY
HAITI	HA
HEARD ISLAND/MCDONALD ISLANDS	HM
HONDURAS	HO
HONG KONG	HK
HOWLAND ISLAND	HQ
HUNGARY	HU
ICELAND	IC
INDIA	IN
INDONESIA	ID
IRAN	IR
IRAQ	IZ
IRELAND	EI
ISRAEL	IS
ITALY	IT
JAMAICA	JM
JAN MAYEN	JN
JAPAN	JA
MONGOLIA	MG
MONTENEGRO	MW
MONTSERRAT	MH
MOROCCO	MO
MOZAMBIQUE	MZ
NAMIBIA	WA
NAURU	NR
NAVASSA ISLAND	BQ
NEPAL	NP

JARVIS ISLAND	DQ
JERSEY	JE
JOHNSTON ATOLL	JQ
JORDAN	JO
JUAN DE NOVA ISLAND	JU
KAZAKHSTAN	KZ
KENYA	KE
KINGMAN REEF	KQ
KIRIBATI	KR
KOREA DEMOCRATIC REPUBLIC	KN
KOREA, REPUBLIC OF	KS
KUWAIT	KU
KYRGYZSTAN	KG
LAOS	LA
LATVIA	LG
LEBANON	LE
LESOTHO	LT
LIBERIA	LI
LIBYA	LY
LIECHTENSTEIN	LS
LITHUANIA	LH
LUXEMBOURG	LU
MACAU	MC
MACEDONIA	MK
MADAGASCAR	MA
MALAWI	MI
MALAYSIA	MY
MALDIVES	MV
MALI	ML
MALTA	MT
MAN, ISLE OF	IM
MARSHALL ISLANDS	RM
MARTINIQUE	MB
MAURITANIA	MR
MAURITIUS	MP
MAYOTTE	MF
MEXICO	MX
MIDWAY ISLANDS	MQ
MOLDOVA	MD
MONACO	MN
SPAIN	SP
SPRATLY ISLANDS	PG
SRI LANKA	CE
ST. HELENA	SH
ST. KITTS AND NEVIS	SC
ST. LUCIA	ST
ST. PIERRE AND MIQUELON	SB
ST. VINCENT/THE GRENADINES	VC
SUDAN	SU

NETHERLANDS	NT
NETHERLANDS	NL
NEW CALEDONIA	NC
NEW ZEALAND	NZ
NICARAGUA	NU
NIGER	NG
NIGERIA	NI
NIUE	NE
NORFOLK ISLAND	NF
NORTHERN MARIANA ISLANDS	CQ
NORWAY	NO
OMAN	MU
PAKISTAN	PK
PALAU	PS
PALMYRA ATOLL	LQ
PANAMA	PM
PAPUA NEW GUINEA	PP
PARACEL ISLANDS	PF
PARAGUAY	PA
PERU	PE
PHILIPPINES	RP
PITCAIRN ISLANDS	PC
POLAND	PL
PORTUGAL	PO
PUERTO RICO	RQ
QATAR	QA
REUNION	RE
ROMANIA	RO
RUSSIA	RS
RWANDA	RW
SAN MARINO	SM
SAO TOME AND PRINCIPE	TP
SAUDI ARABIA	SA
SENEGAL	SG
SERBIA	SR
SEYCHELLES	SE
SIERRA LEONE	SL
SINGAPORE	SN
SLOVAKIASI/SLOVENIA	LO
SOLOMAN ISLANDS	BP
SOMALIA	SO
SOUTH AFRICA	SF
SOUTH GEORGIA/SANDWICH ISLANDS	SX

SURINAME	NS
SVALBARD	SV
SWAZILAND	WZ
SWEDEN	SW
SWITZERLAND	SZ
SYRIA	SY
TAIWAN	TW
TAJKISTAN	TI
TANZANIA	TZ
THAILAND	TH
TOGO	TO
TOKELAU	TL
TONGA	TN
TRINIDAD AND TOBAGO	TD
TROMELIN ISLAND	TE
TUNISIA	TS
TURKEY	TU
TURKMENISTAN	TX
TURKS AND CAICOS ISLANDS	TK
TUVALU	TV
UGANDA	UG
UKRAINE	UP
UNITED ARAB EMIRATES	TC
UNITED KINGDOM	UK
UNITED STATES	US
URUGUAY	UY
UZBEKISTAN	UZ
VANUATU	NH
VATICAN CITY	VT
VENEZUELA	VE
VIETNAM	VM
VIRGIN ISLANDS	VQ
WAKE ISLAND	WQ
WALLIS AND FUTUNA	WF
WEST BANK	WE
WESTERN SAHARA	WI
WESTERN SAMOA	WS
YEMEN	YM
ZAIRE	CG
ZAMBIA	ZA
ZIMBABWE	ZI
Unknown Country	99

Client Registration & Episode Data Entry Codes

Refer to INSYST FORMS page

On the BHCS Provider Website

@

<https://go.bhcsportal.org>

Appendix A: Special Key Sequences

The Num Lock (Gold) key sequences, Control key combinations, and Special Function keys used in INSYST are listed below.

Num Lock (Gold) Key Sequences

The Num Lock (Gold) Key is the PF1 Key on Digital Equipment Corporation terminals, and is the Num Lock key on PCs. Other keys may be used on other terminals.

To use Num Lock (Gold) Key sequences, press the Num Lock (Gold) Key, release it, and then press the next key. For example, if the instructions say you should press Num Lock (Gold)-E, it means you should press the Num Lock (Gold) key, release it and then press “E” and release it.

Num Lock (Gold) Key sequences used in INSYST are:

- **Num Lock (Gold)-A: (All / Authorize)** gives you additional functions in entry and maintenance screens, such as All Clients/Services, Supervisor Mode and Late Entry Mode.
- **Num Lock (Gold)-A: (Unlimited or Continuous Paging)** Allows the user to speed up performance as maintenance screens usually include only two pages of information by default. If you have to see more items than this, you should request unlimited paging by pressing
- **Num Lock (Gold)-A** before you display the list.
- **Num Lock (Gold)-B: (Backup)** makes the screen page back one page, to display records in a list that cannot fit on a single screen.
- **Num Lock (Gold)-C: (Client #)** moves the cursor to the Client Number field on some screens.
- **Num Lock (Gold)-D: (Down Two)** makes the screen page forward two pages, to display records in a list that cannot fit on a single screen.
- **Num Lock (Gold)-E: (Exit)** exits from the current screen and returns to the menu, without saving data entered in the screen, or returns to the previous menu.
- **Num Lock (Gold)-F: (Face Sheet)** request the menu to select Face Sheets, and then press F6 to complete the request.
- **Num Lock (Gold)-H: (Home)** moves the cursor to its home position on the current screen, the field on the screen where data entry began.
- **Num Lock (Gold)-I: (Insert)** inserts a new record when you are using the Maintenance Selection screens.
- **Num Lock (Gold)-M: (More)** makes the screen page forward one page, to display records in a list that cannot fit on a single screen.
- **Num Lock (Gold)-R: (Refresh)** restarts the screen, with no values entered. This is useful if you made mistakes in data entry.
- **Num Lock (Gold)-S: (Save and Exit)** leaves the current data entry or maintenance screen, and saves the data entered. This sequence retains the current Client and Reporting Unit, so it automatically displays it in the next screen you use.

- **Num Lock (Gold)-U: (Up Two)** makes the screen page back two pages, to display records in a list that cannot fit on a single screen.

Control Key Combinations

To use Control Key combinations, continue holding down the Ctrl Key while you press the next key in the sequence. For example, if the instructions say to press Control/W, you should press the Ctrl Key, keep holding it down while you press “W”, and then release both.

Control Key combinations used in INSYST are:

- **Control/H: (Hop Back)** moves the cursor back one field.
- **Control/J: (Junk)** clears a field.
- **Control/W:** repaints or refreshes the screen. Use it if the screen display has been disturbed.
- **Control/Z:** ends an editing session in the Mail, Files, and Client Message utilities.

INSYST MENU SHORTCUT & COMMANDS

CLIENT SCREENS

Screen	Alpha Menu Commands	Numeric Menu Commands
Client Locator	CLIE LO	1 7
Client Registration	CLIE RE	1 1
Client Management (Maintenance/Update)	CLIE MA	1 2
Client Address	CLIE AD	1 6
Client Periodic Data (MHS ONLY)	CLIE CSI	1 8

EPISODE SCREENS

Screen	Alpha Menu Commands	Numeric Menu Commands
Episode Open	EP OP	4 1
Episode Close	EP CL	4 2
Episode Management (Maintenance/Update)	EP MA	4 4

SERVICE ENTRY SCREENS

Screen	Alpha Menu Commands	Numeric Menu Commands
Service Single Entry	SER SI	5 1
Service Multiple Entry	SER MU	5 4
Service Management (Maintenance/Update)	SER MA	5 9

MOST USED COMMANDS

Clear Field	Ctrl J
All Clients (Continuous Paging) Authorization (Supervisor & Late Entry)	Num Lock (Gold) A
Insert new data (Address, CSI & Utilization Control data entry screens)	Num Lock (Gold) I
Move Cursor forward one Field	TAB Key
Move Cursor backward one Field	F12 Key
Move Down to next Page (i.e. list of clients)	Num Lock (Gold) M
Move Back to last Page (i.e. list of clients or services)	Num Lock (Gold) B
Exit Screen (go back to last screen/menu)	Num Lock (Gold) E
Refresh Screen (Clear a screen without leaving the screen)	Num Lock (Gold) R
Save the client information and go back one screen	Num Lock (Gold) S

PRINTER COMMANDS

Show Printer Queue	UT PR SH	13 4 1
Start Printer Queue	UT PR ST	13 4 2

