

INSYST Client and Service Information (CSI) Assessment Record Data Screens Onboarding Instructions

The following step by step guide is provided to assist you in transitioning from using the e-Form to using the new CSI Assessment Record Data screens in INSYST for data tracking.

Step 1. Access

Special access is required to use the needed screens in InSYST. To receive access, please complete the [InSyst User Authorization](#) form and select “Yes” for the question “Does User Require access to CSI Assessment Screens?”

User Authorization Information

If the Contact Person and the Staff Person are the same individual, you will NOT be able to complete the request. You cannot submit account changes for yourself.

Confidentiality Agreement	<input type="text"/>	<input type="button" value="upload"/> (3 MB max)	<input type="button" value="?"/>
• User's Phone # :	<input type="text"/>		<input type="button" value="?"/>
• User's Email :	<input type="text"/>		<input type="button" value="?"/>
• Select Level of Authorization Required for this User :	Level 6 - INSYST Data Input (Admin Support Staff)		<input type="button" value="?"/>
InSyst Authorization Setup:	[on Management) Staff		
• Does User Require access to CSI Assessment Screens?	Yes No		
Set Permissions for User same as an Existing User (Provide a USERNAME) :	<input type="text"/>		<input type="button" value="?"/>
• Printer Queue :	<input type="text"/>		<input type="button" value="?"/>
• Primary Reporting Unit (RU) :	<input type="text"/>		
Other Reporting Unit (RU) :	<input type="text"/>		
Other Reporting Unit (RU) :	<input type="text"/>		
Other Reporting Unit (RU) :	<input type="text"/>		

Step 2. Training

All training materials, including two recorded training programs related to Network Adequacy requirements and use of the CSI Timeliness Assessment screens, can be found on the ACBH Provider Website, [Quality Assurance Training page](#), under Training Handouts and Resources, section titled: *Network Adequacy Certification Tool (NACT) – Timely Access Client Service Information (CSI) Assessment Record Data Submission Training for Community Based Organizations.*

For your convenience, the links have also been provided below. Users who are new to CSI Assessment Record Data collection and requirements should review all training materials provided prior to using the new screens. Users with previous knowledge of the CSI Assessment Record Data requirements, may choose to only review the recordings noted with asterisks ** below.

1. [INSYST CSI Timeliness Training Manual **](#)
2. [MHS CSI Timeliness Data Collection Form with Instructions**](#)
3. [CSI Assessment Record Data FAQ's](#)
4. [CSI Assessment Record Data Definitions](#)
5. [INSYST CSI Assessment Data Record Submission – Recorded Training**](#)
6. [Network Adequacy Certification Tool Training- Presentation Deck](#)
7. [Network Adequacy Certification Tool- Recorded Training](#)

Step 3. Begin Data Entry

Once you complete the first two steps, you are ready to begin using the CSI Assessment Record Data screens in InSYST, instead of the e-form, for your data entry.

Questions and Support

If you have questions about CSI Assessment Data Recording or utilizing the new INSYST CSI Assessment Record Data screens, please email QATA@acgov.org and HIS@acgov.org.