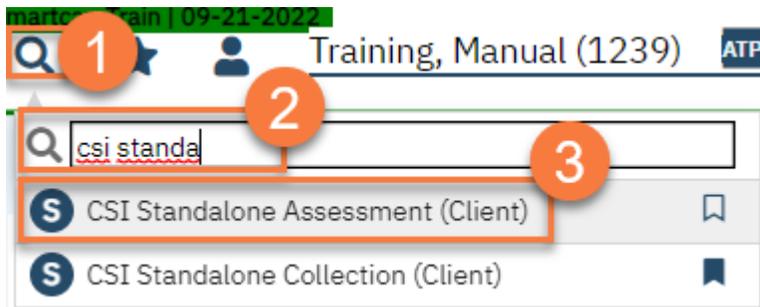
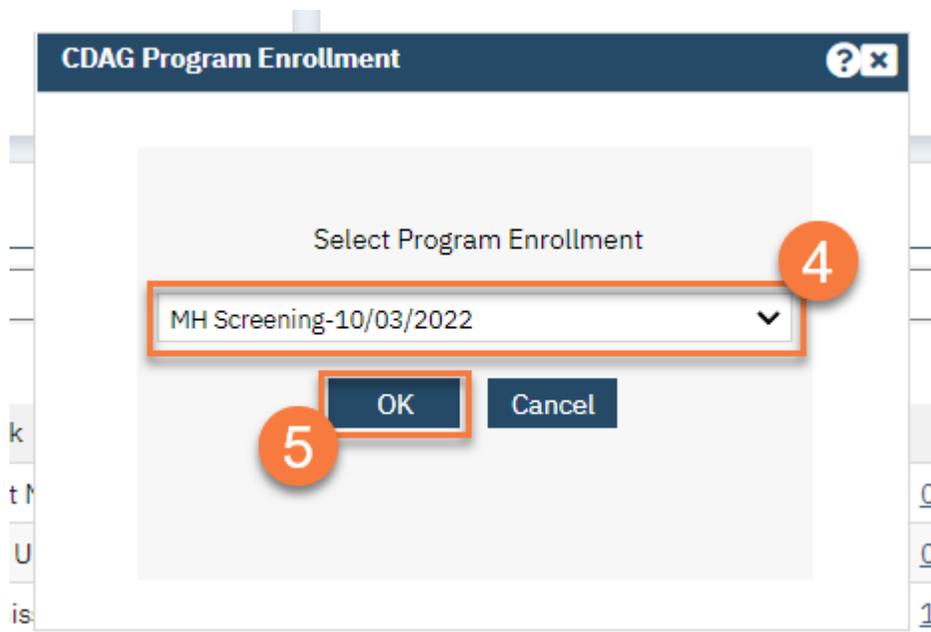


How to Complete a CSI Assessment Data Record

1. You must first have the client open, then **click the Search icon**.
2. **Type “CSI Standalone Assessment”** into the search bar.
3. **Select “CSI Standalone Assessment (Client)”** from the search results.



4. In the CDAG Program Enrollment window pop-up, **click the drop down** and **click to select** the appropriate program.
5. **Click OK** to continue.



6. The CSI Standalone Assessment document will open. **Complete the document**. This document has logic built in that will automatically pull in some information. Make sure to check any information already included for accuracy.

- a. Since the CSI Assessment Data Record is edited often before being completed, click Save each time you enter information.
- b. Only once the form is fully completed should you click Sign.

CSI Standalone Assessment

Effective 05/06/2023 Status New Author Clinician, Robert

Save Sign

Initial

CSI Assessment Data is required for all new clients and clients not seen in the past 12 months. This data is used to capture the timeliness of service provision from time of request for service to assessment and subsequent receipt of services. Dates must correspond to the appropriate date of contact, offered appointment or provided service as they relate to the client's CSI reportable services.

CSI Assessment

Request Date	04/17/2023	Referral Source	
First Offered Assessment Appointment Date		Second Offered Assessment Appointment Date	
Third Offered Assessment Appointment Date		Accepted Assessment Appointment Date	
Assessment Start Date		Assessment End Date	
First Offered Treatment Appointment Date		Second Offered Treatment Appointment Date	
Third Offered Treatment Appointment Date		Accepted Treatment Appointment Date	
Treatment Start Date		Closure Reason	
Closed Out Date		Referred To	
Other			