

Client Services Information (CSI) Assessment¹ Record

¹Assessment: Assessment for CSI purposes refers to the process of determining if a beneficiary meets medical necessity criteria.

²Offered Assessment Appointments: Assessment Appointment First, Second, and/or Third Offer Dates have to be within ten business days of Date of First Contact.

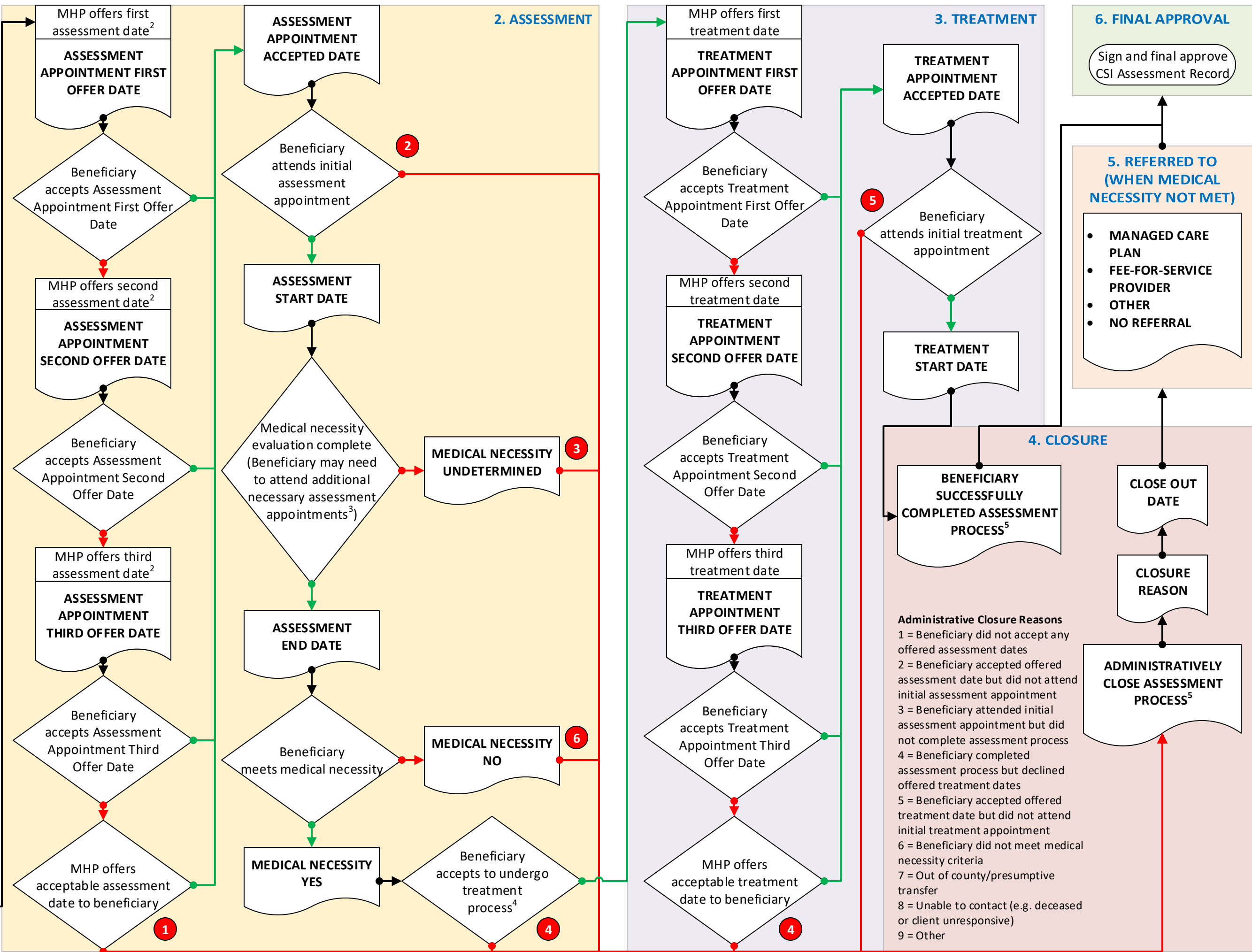
³Assessment Appointments: As soon as a client has been determined to meet medical necessity criteria, the client should be marked as such and the next appointment can be counted toward treatment.

⁴Rejecting Treatment Process: If beneficiary rejects to undergo treatment process, a Treatment Appointment First Offer Date must still be filled in. Recommend using Assessment End Date.

⁵Closure – Completing Assessment Process: A client who does not complete the entire process is to be administratively closed. Successful completion of the assessment process includes attending initial treatment appointment. An accurate record must have either a Treatment Start Date or a Closure Date.

Circled #s: Circled numbers are associated with the administrative closure reasons. Reasons 7 – 9 are not noted on the flowchart.

Green/Red Paths: Green paths are for answering yes. Red is for answering no or for administrative closures.



- Administrative Closure Reasons**
- 1 = Beneficiary did not accept any offered assessment dates
 - 2 = Beneficiary accepted offered assessment date but did not attend initial assessment appointment
 - 3 = Beneficiary attended initial assessment appointment but did not complete assessment process
 - 4 = Beneficiary completed assessment process but declined offered treatment dates
 - 5 = Beneficiary accepted offered treatment date but did not attend initial treatment appointment
 - 6 = Beneficiary did not meet medical necessity criteria
 - 7 = Out of county/presumptive transfer
 - 8 = Unable to contact (e.g. deceased or client unresponsive)
 - 9 = Other