

# *“Enter a CDS Discharge” User Guide*

## **Summary**

**NOTE:** Due to the dynamics of state government and the changing needs for the OASAS CDS (Client Data System), some items in this tutorial might have been removed from the live CDS. Similarly, some new items may appear in the live system that are not reflected in this tutorial. To find the most updated versions of CDS forms and instructions, click the Forms and Instructions tab on the [OASAS Applications Home page](#), located under CDS Documentation.

This User Guide will show the user how to enter a standard client discharge into the Client Data System (CDS). This User Guide is intended for external OASAS Applications users only.

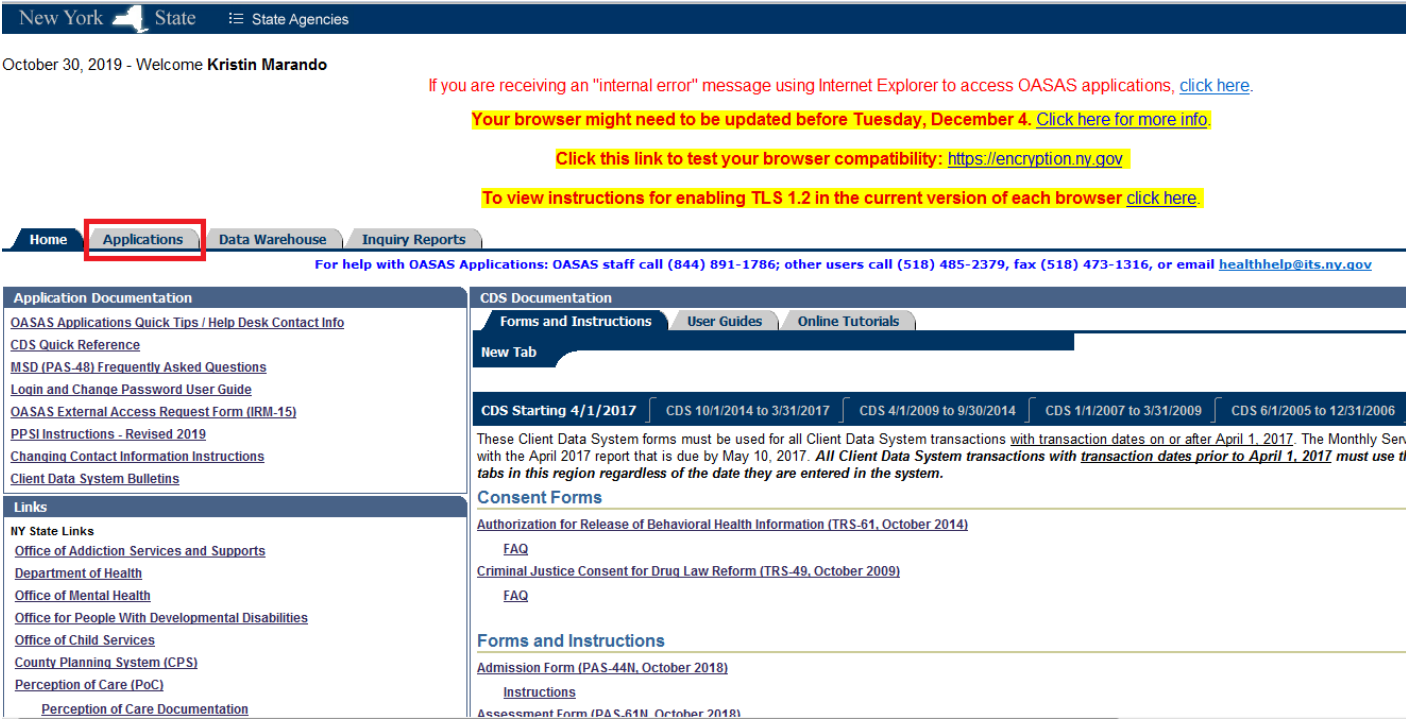
There are four sections in this User Guide:

- Open the CDS Application
- Enter Program and Client ID Information
- Enter the Discharge Information
- Fixing Errors

When you are entering a discharge for a client, you will probably have a completed Discharge Form (PAS-45N) for the client.

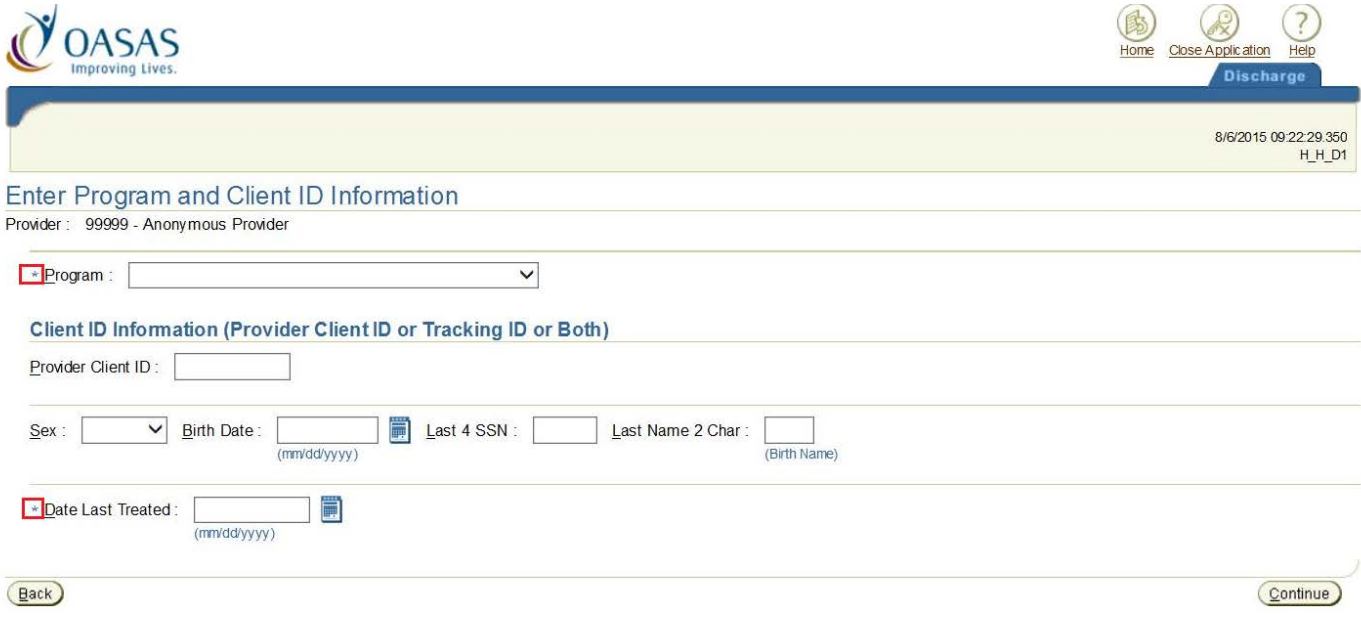
NOTE: It would be most helpful to be logged into the OASAS Client Data System application to better follow this user guide. For more information on logging into the OASAS Client Data System application, please review the Login and Change Password Tutorial or User Guide on the OASAS Applications site, located at <https://apps.oasas.ny.gov>.

## Open the CDS Application

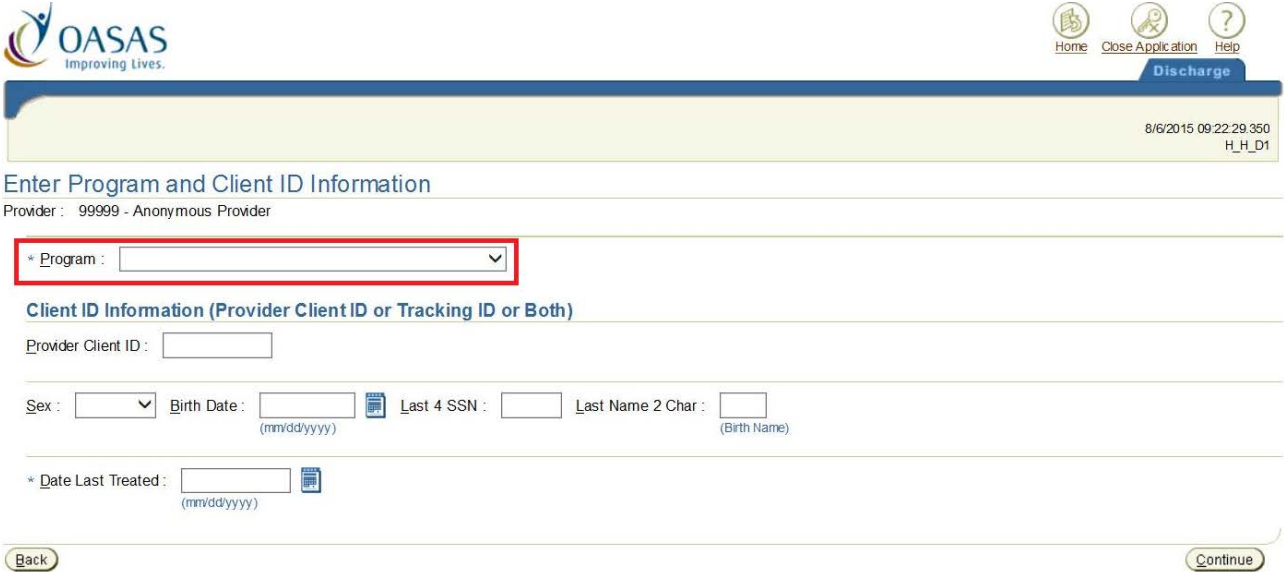
Step	Instructions	Image
1	<p>Click the link below to reach our applications Home page and then click Applications. <a href="#">Apps Home Page</a></p>	 <p>The screenshot shows the OASAS Applications Home Page. At the top, there is a header with 'New York State' and 'State Agencies'. Below the header, there is a welcome message for Kristin Marando dated October 30, 2019. A navigation menu is visible with 'Applications' highlighted in a red box. The main content area is divided into several sections: 'Application Documentation' with links like 'OASAS Applications Quick Tips / Help Desk Contact Info', 'CDS Quick Reference', 'MSD (PAS-48) Frequently Asked Questions', 'Login and Change Password User Guide', 'OASAS External Access Request Form (IRM-15)', 'PPSI Instructions - Revised 2019', 'Changing Contact Information Instructions', and 'Client Data System Bulletins'; 'Links' with various state agency links; 'CDS Documentation' with tabs for 'Forms and Instructions', 'User Guides', and 'Online Tutorials'; 'Consent Forms' with links for 'Authorization for Release of Behavioral Health Information (TRS-61, October 2014)' and 'Criminal Justice Consent for Drug Law Reform (TRS-49, October 2009)'; and 'Forms and Instructions' with links for 'Admission Form (PAS-44N, October 2018)' and 'Assessment Form (PAS-64N, October 2018)'. A red box highlights the 'Applications' link in the navigation menu.</p>

Step	Instructions	Image
1a	Once in the Client Data System home page click the link to <b>Client Data System</b> to reach the actions page.	<p>The screenshot shows the Client Data System home page. At the top, there is a header with 'New York State' and 'State Agencies'. Below the header, there is a navigation bar with 'Home' and 'Applications' tabs. Under 'Applications', there are links for 'Client Data System', 'Gambling', 'Provider Directory System', 'Monthly Service Delivery', 'IPMES/Workscope', and 'Help'. A yellow box contains a message: 'Applications and reports open in a separate browser and require pop-ups to be allowed for this website. Click the notepad icon next to each report link for details about the report.' Below this, there is a section titled 'Client Data System Application' with a red box around the 'Client Data System' link. Further down, there are sections for 'STAR-QI Reports' and 'Client Data System Batch System'.</p>

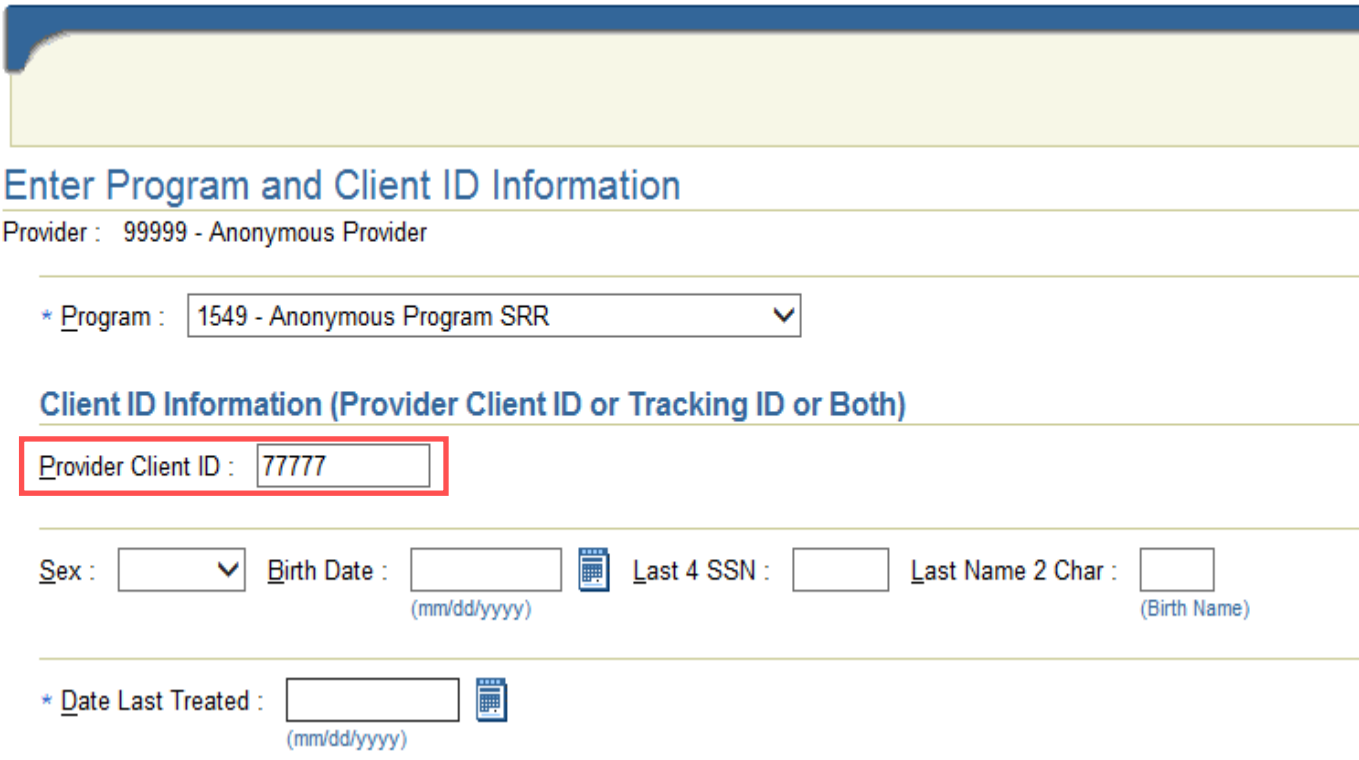
Step	Instructions	Image
2	<p>This is the “CDS Home” page. From here you can choose any of the links shown.</p> <p>To begin to enter a Discharge transaction, first click the <b>Discharge</b> link.</p>	

Step	Instructions	Image
3	<p>The discharge entry has two pages. When you begin the discharge entry process, first start on the “Enter Program and Client ID Information” page, which contains the program and client information. Here, you must identify the client that is to be discharged.</p> <p>NOTE: An asterisk (*) indicates that the field is required and must be completed.</p>	 <p>The screenshot shows the OASAS web application interface. At the top left is the OASAS logo with the tagline 'Improving Lives.'. At the top right are navigation icons for Home, Close Application, and Help, along with a 'Discharge' button. Below the navigation bar is a yellow header area containing the date and time '8/6/2015 09:22:29.350' and the user identifier 'H_H_D1'. The main content area is titled 'Enter Program and Client ID Information' and shows the provider as '99999 - Anonymous Provider'. The form contains several input fields: a dropdown menu for 'Program', a text box for 'Provider Client ID', a dropdown for 'Sex', a date field for 'Birth Date' (format mm/dd/yyyy), a text box for 'Last 4 SSN', a text box for 'Last Name 2 Char' (format Birth Name), and a date field for 'Date Last Treated' (format mm/dd/yyyy). At the bottom of the form are 'Back' and 'Continue' buttons.</p>

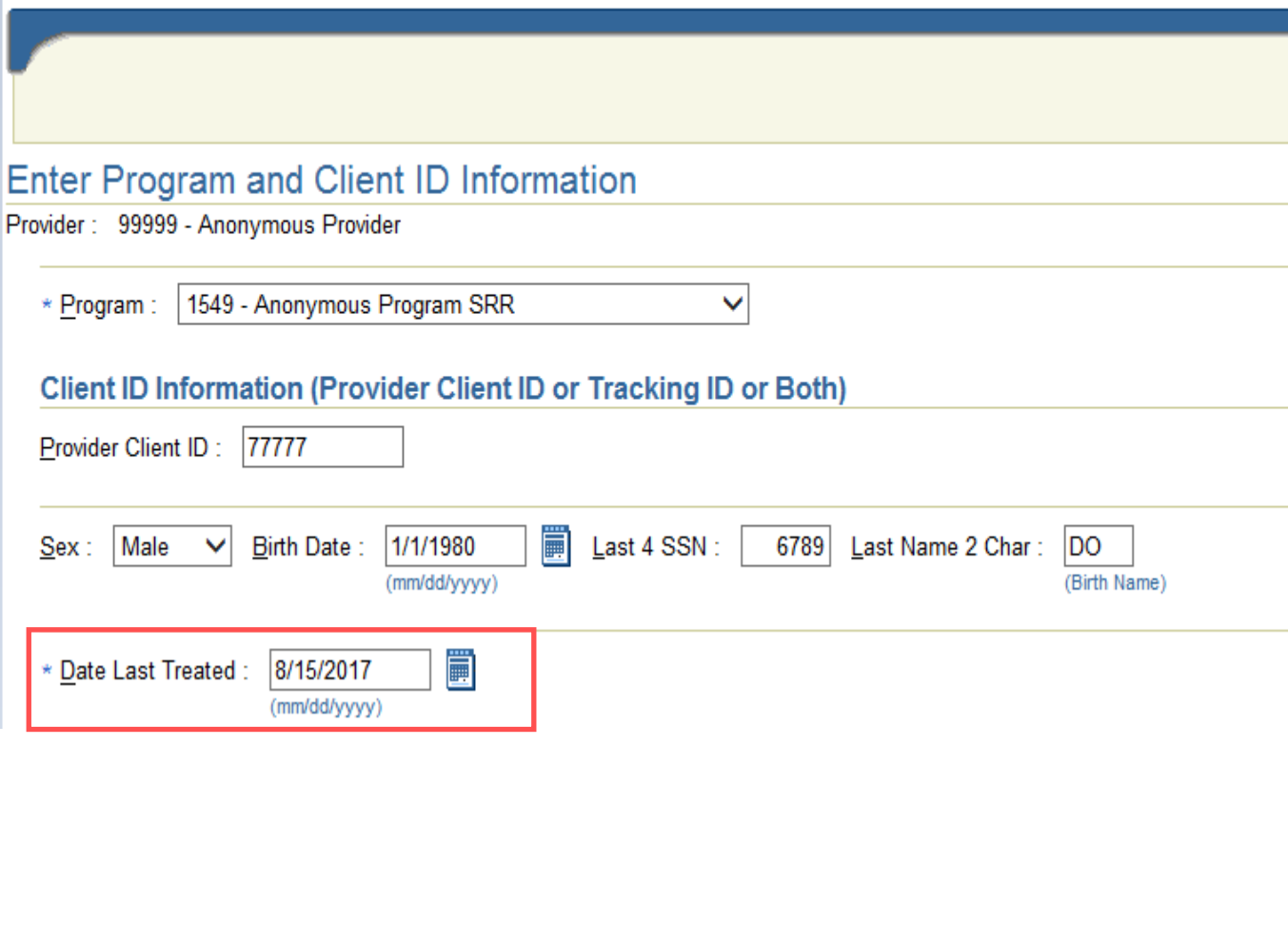
## Enter Program and Client ID Information

Step	Instructions	Image
<p><b>3a</b></p>	<p>First, use the dropdown list to select the <b>Program</b> from which the client is being discharged.</p> <p>NOTE: You can use the keyboard to select items from the dropdown lists. When selecting an item from the <b>Program</b> list, if you type the first digit of one of the program numbers, you will move to the first entry beginning with that digit. If you press the same digit again, you will move to the next entry beginning with that digit.</p> <p>In this User Guide example, the <b>Program</b> field is selected using the mouse.</p> <p>First, click the <b>down arrow</b> for the <b>Program</b> field to open the dropdown list.</p>	 <p>The screenshot shows the OASAS web application interface. At the top left is the OASAS logo with the tagline 'Improving Lives.'. On the top right, there are navigation icons for Home, Close Application, and Help, along with a 'Discharge' button. Below the header, the page title is 'Enter Program and Client ID Information'. The provider information is 'Provider : 99999 - Anonymous Provider'. The main form area contains a dropdown menu for '* Program :', which is highlighted with a red border. Below this is the section 'Client ID Information (Provider Client ID or Tracking ID or Both)'. It includes a text field for 'Provider Client ID :'. Further down are fields for 'Sex :', 'Birth Date : (mm/dd/yyyy)', 'Last 4 SSN :', and 'Last Name 2 Char : (Birth Name)'. At the bottom of the form is a field for '* Date Last Treated : (mm/dd/yyyy)'. At the very bottom of the page, there are 'Back' and 'Continue' buttons.</p>

Step	Instructions	Image
<p><b>3b</b></p>	<p>Select the appropriate program from the list.</p> <p>For this User Guide example, we selected “<b>1549 – Anonymous Program SRR.</b>”</p> <p>The programs that appear when you access the live CDS Application will be different for your provider.</p>	

Step	Instructions	Image
4	<p>To identify the client to be discharged, enter the Provider Client ID or Client Tracking ID (or both). In this User Guide example, we entered only the <b>Provider Client ID</b> number (i.e., the ID number that your program has already assigned to this client).</p> <p>Alternatively, the other four client fields could be entered instead (i.e., <b>Sex</b>, <b>Birth Date</b>, <b>Last 4 SSN</b>, and <b>Last Name 2 Char</b>) to identify the client.</p>	 <p><b>Enter Program and Client ID Information</b></p> <p>Provider : 99999 - Anonymous Provider</p> <p>* Program : 1549 - Anonymous Program SRR</p> <p><b>Client ID Information (Provider Client ID or Tracking ID or Both)</b></p> <p>Provider Client ID : 77777</p> <p>Sex : Birth Date : Last 4 SSN : Last Name 2 Char :  <small>(mm/dd/yyyy) (Birth Name)</small></p> <p>* Date Last Treated :  <small>(mm/dd/yyyy)</small></p>



Step	Instructions	Image
5	<p>Next is the required field <a href="#">Date Last Treated</a>.</p> <p>This is the date of the client’s last face-to-face treatment contact with program staff. Notice that this definition varies slightly by program type. For further information, see the <a href="#">Discharge Form Instructions</a> found on the OASAS Applications web site under the “CDS Documentation” section, under the “Forms and Instructions” tab.</p> <p>When entering dates, enter the date directly or use the calendar icon to select the date. CDS suggests that you enter the date using the following format: mm/dd/yyyy.</p> <p>NOTE: You can also enter the date using just one number for the month (or day) so that Aug 15, 2017 would be “8/15/2017” as in the example to the right.</p>	 <p>The screenshot shows a web form titled "Enter Program and Client ID Information". At the top, it says "Provider : 99999 - Anonymous Provider". Below that is a dropdown menu for "Program" set to "1549 - Anonymous Program SRR". A section titled "Client ID Information (Provider Client ID or Tracking ID or Both)" contains a text box for "Provider Client ID" with the value "77777". Below this are fields for "Sex" (Male), "Birth Date" (1/1/1980), "Last 4 SSN" (6789), and "Last Name 2 Char" (DO). The "Date Last Treated" field is highlighted with a red box and contains the value "8/15/2017".</p>

Step	Instructions	Image
6	<p>Once the identifying client information has been entered, click the <b>Continue</b> button in the lower right corner of the page.</p> <p>The application will then search for the matching admission record for that client.</p>	<p><b>Enter Program and Client ID Information</b></p> <p>Provider : 99999 - Anonymous Provider</p> <p>* Program : 1549 - Anonymous Program SRR</p> <p><b>Client ID Information (Provider Client ID or Tracking ID or Both)</b></p> <p>Provider Client ID : 77777</p> <p>Sex : Male Birth Date : 1/1/1980 Last 4 SSN : 6789 Last Name 2 Char : DO  <small>(mm/dd/yyyy) (Birth Name)</small></p> <p>* Date Last Treated : 8/15/2017  <small>(mm/dd/yyyy)</small></p> <p>Back <span style="float: right;">Continue</span></p>

Step	Instructions	Image
7	<p>Now you are on the “<i>Discharge Information</i>” page. Notice that all the information you entered on the first page is displayed at the top of this page.</p> <p>Some fields will be verified in the system by comparing them to other fields. This will be explained further along in the User Guide. Verification does not occur until you click the <b>Save</b> button. For more information on the fields and how the questions should be answered, see the “Discharge Form Instructions” on the OASAS Applications web site.</p> <p>For <b>Part 820 residential treatment programs</b> the count of days spent in each element will be prepopulated under “<i>Part 820 Program Element Information</i>”.</p> <p>For clients that engaged in a Part 820 residential treatment program the “<i>History</i>” button will display their transitions From and To each element of care that they participated in during this treatment episode.</p> <p>Follow this link for further explanation regarding Part 820 Element Transitions at <a href="#">Element Transition History</a>.</p>	<p>The screenshot displays a web form with the following sections:</p> <ul style="list-style-type: none"> <li><b>Discharge Information:</b> Provider : 99999 - Anonymous Provider; Program : 1549 - Anonymous Program SRR.</li> <li><b>Client ID Information:</b> Provider Client ID : 77777; Sex : Male; Birth Date : 1/1/1980; * Last 4 SSN : 6789; * Last Name 2 Char : DO (Birth Name).</li> <li><b>Part 820 Program Element Information:</b> Days in Stabilization : 23; Days in Rehabilitation : 7; Days in Reintegration (Congregate) : 1; Reintegration (Scatter-Site) : 13. A "History" button is highlighted with a red box.</li> <li><b>LOCADTR Information:</b> LOCADTR Assessment ID : [input]; Created Date : [input] (mm/dd/yyyy).</li> <li><b>TRS-61: Identifying Information (ID):</b> ID Consent Date : 8/1/2017; ID Revoke Date : [input]; Last Name : Doe (Birth Name); First Name : John; Medicaid Client ID : XX00000X; Last Name : Doe (Current Name); Social Security Number : 123-45-6789.</li> </ul>

Step	Instructions	Image																								
7a	<p>This is how the History for a client's Element Transitions might look.</p> <p>Shown are the dates and transaction types along with the From and To Element of Care that coincides with each transition.</p>	<table border="1"> <thead> <tr> <th data-bbox="667 196 835 224">Program</th> <th data-bbox="835 196 1037 224">Date</th> <th data-bbox="1037 196 1377 224">Transaction Type</th> <th data-bbox="1377 196 1984 224">From/To Element of Care</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 240 835 267">1549</td> <td data-bbox="835 240 1037 267">08/01/2017</td> <td data-bbox="1037 240 1377 267">Admission</td> <td data-bbox="1377 240 1984 284">From : To : Stabilization</td> </tr> <tr> <td data-bbox="667 300 835 328">1549</td> <td data-bbox="835 300 1037 328">08/09/2017</td> <td data-bbox="1037 300 1377 328">Element Transition</td> <td data-bbox="1377 284 1984 344">From : Stabilization To : Reintegration: Congregate</td> </tr> <tr> <td data-bbox="667 360 835 388">1549</td> <td data-bbox="835 360 1037 388">08/10/2017</td> <td data-bbox="1037 360 1377 388">Element Transition</td> <td data-bbox="1377 344 1984 404">From : Reintegration: Congregate To : Rehabilitation</td> </tr> <tr> <td data-bbox="667 420 835 448">1549</td> <td data-bbox="835 420 1037 448">08/17/2017</td> <td data-bbox="1037 420 1377 448">Element Transition</td> <td data-bbox="1377 404 1984 464">From : Rehabilitation To : Stabilization</td> </tr> <tr> <td data-bbox="667 480 835 508">1549</td> <td data-bbox="835 480 1037 508">09/01/2017</td> <td data-bbox="1037 480 1377 508">Element Transition</td> <td data-bbox="1377 464 1984 524">From : Stabilization To : Reintegration: Scatter-Site</td> </tr> </tbody> </table> <p data-bbox="1283 560 1371 597" style="text-align: center;">Close</p>	Program	Date	Transaction Type	From/To Element of Care	1549	08/01/2017	Admission	From : To : Stabilization	1549	08/09/2017	Element Transition	From : Stabilization To : Reintegration: Congregate	1549	08/10/2017	Element Transition	From : Reintegration: Congregate To : Rehabilitation	1549	08/17/2017	Element Transition	From : Rehabilitation To : Stabilization	1549	09/01/2017	Element Transition	From : Stabilization To : Reintegration: Scatter-Site
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Step	Instructions	Image
8	<p>LOCADTR Information consists of <a href="#">Assessment ID</a> and <a href="#">Created Date</a> and are optional items that can be entered at the program's discretion. Further Information about Level of Care for Alcohol and Drug Treatment Referral can be found here - <a href="#">LOCADTR 3.0</a></p> <p>The TRS-61 section consists of the Identifying Information (ID). This information will prefill based on data previously entered on the Admission transaction or the Opioid Annual Treatment Update.</p> <p>Links to the <i>Authorization for Release of Behavioral Health Information Form (TRS-61)</i> as well as an FAQ document can be found on the Forms and Instructions tab of the <a href="#">OASAS Applications Home</a>.</p>	<p>The screenshot displays the following sections:</p> <ul style="list-style-type: none"> <li><b>Discharge Information:</b> Provider : 99999 - Anonymous Provider; Program : 1549 - Anonymous Program SRR</li> <li><b>Client ID Information:</b> Provider Client ID : 77777; Sex : Male; Birth Date : 1/1/1980; * Last 4 SSN : 6789; * Last Name 2 Char : DO (Birth Name); Date Admitted to Program : 8/1/2017; * Date Last Treated : 8/15/2017 (mm/dd/yyyy)</li> <li><b>Part 820 Program Element Information:</b> Days in Stabilization : 14; Days in Reintegration (Congregate) : 0; Days in Rehabilitation : 0; Reintegration (Scatter-Site) : 0; History button</li> <li><b>LOCADTR Information:</b> Assessment ID : [input]; Created Date : [input] (mm/dd/yyyy)</li> <li><b>TRS-61: Identifying Information (ID):</b> ID Consent Date : 8/1/2017; Last Name : Doe (Birth Name); First Name : John; Medicaid Client ID : XX00000X; ID Revoke Date : [input]; Last Name : Doe (Current Name); Social Security Number : 123-45-6789</li> </ul>

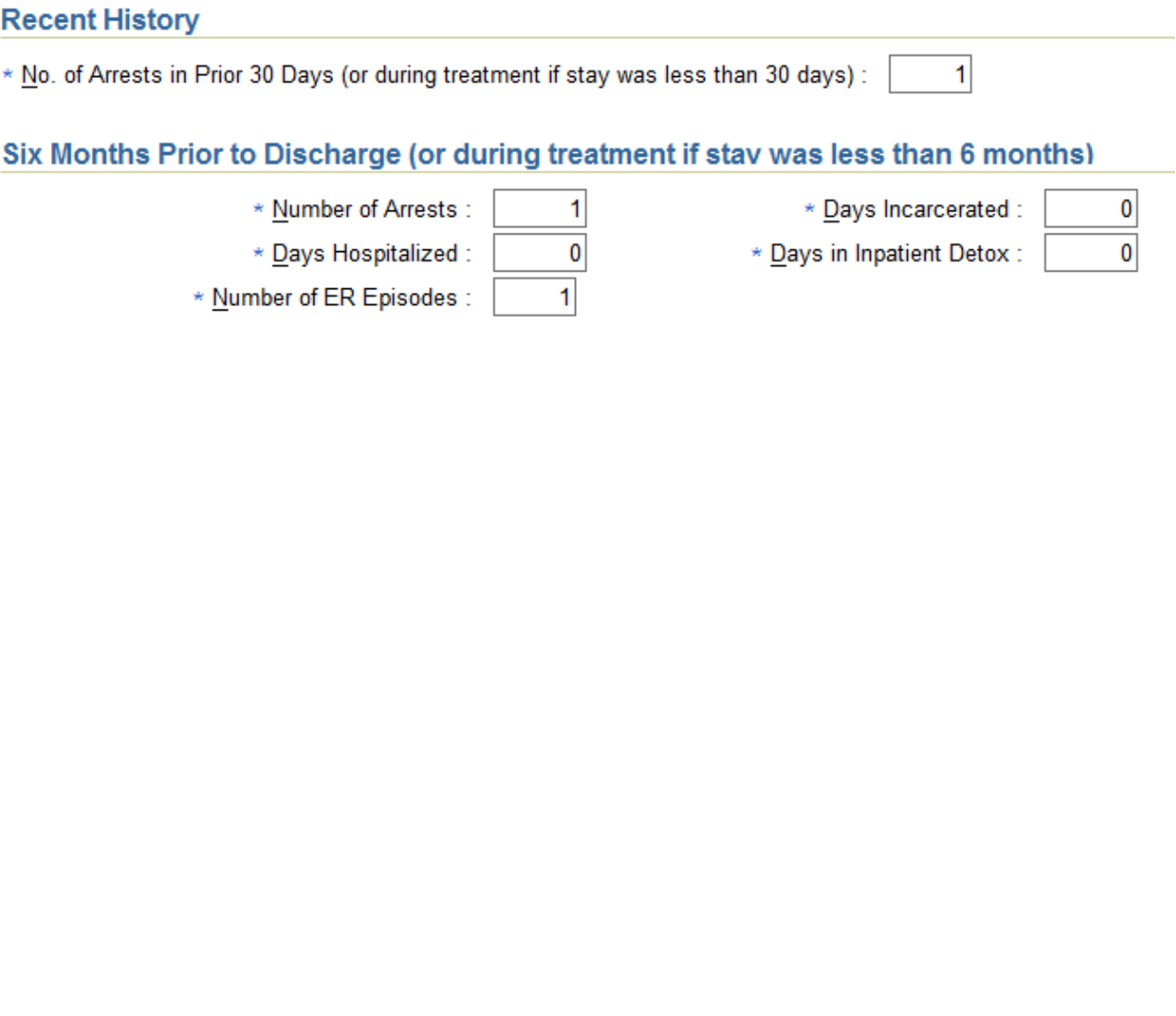
## Enter the Discharge Information

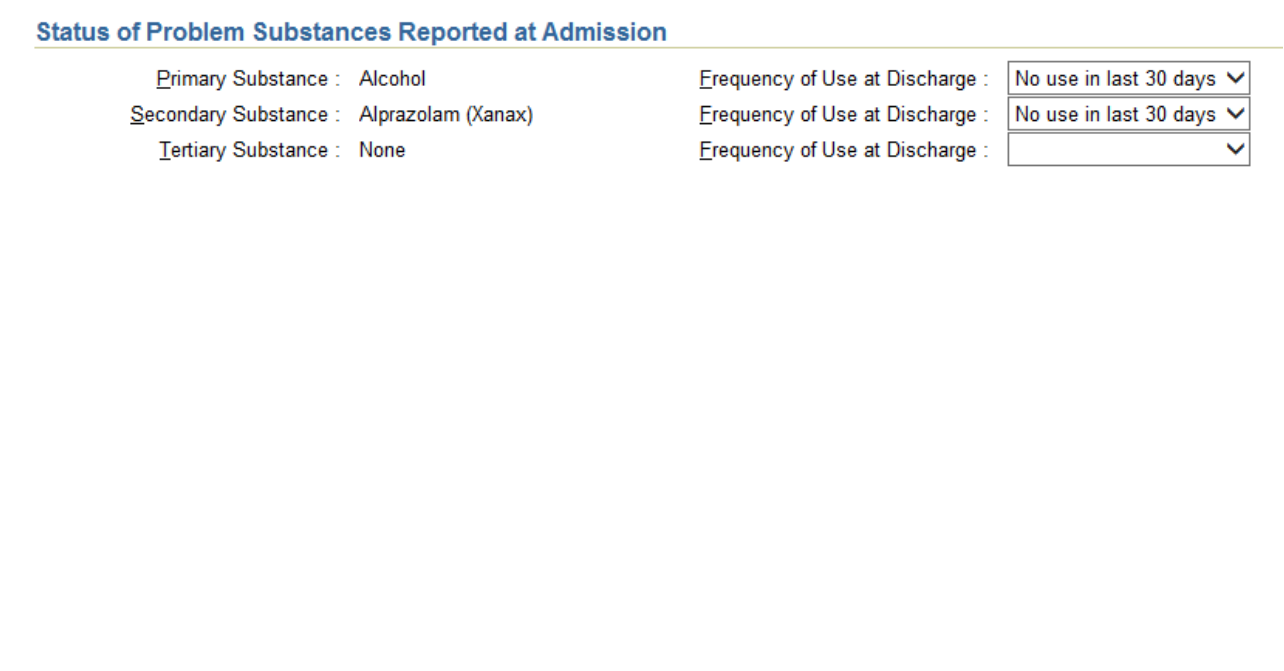
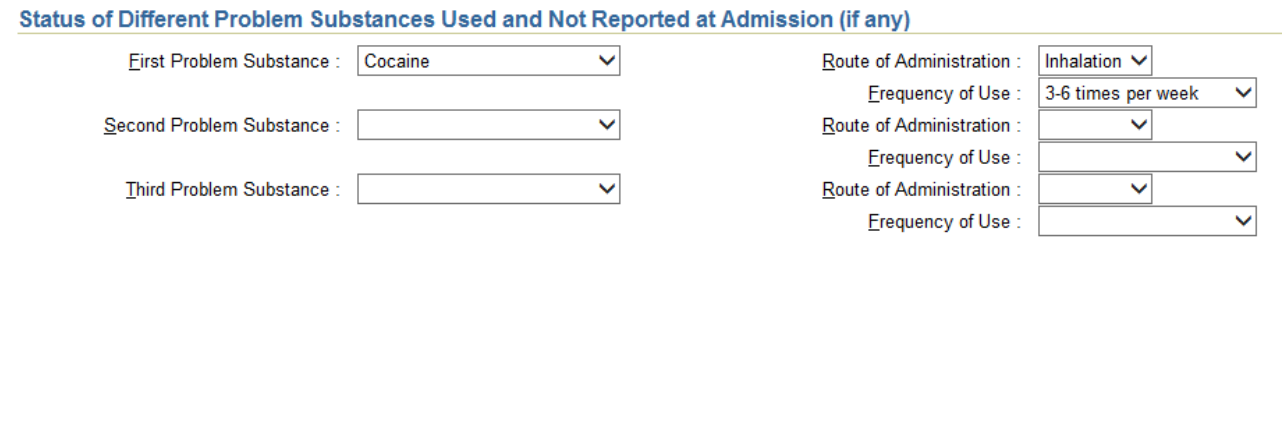
Step	Instructions	Image
<p><b>9</b></p>	<p>The next section requiring data entry, Demographics, shows the client's <b>Education at Admission</b>. This is taken from the client's admission record. It is displayed to reduce the chance of making a data entry error for <b>Education at Discharge</b>. <b>Education at Discharge</b> must be the same or higher level than <b>Education at Admission</b>.</p> <p>Note: Recall that the asterisk (*) indicates that the field is required. Many of the fields on this page are required.</p>	<p><b>TRS-61: Identifying Information (ID)</b></p> <p>ID Consent Date : 8/1/2017          Last Name : Doe          (Birth Name)          First Name : John          Medicaid Client ID : XX00000X</p> <p>ID Revoke Date :          Last Name : Doe          (Current Name)          Social Security Number : 123-45-6789</p> <p><b>Demographics</b></p> <p>Education at Admission : High School Diploma</p> <p>* Education at Discharge : <span style="border: 2px solid red; padding: 2px;">▼</span></p> <p>* Employment : ▼</p> <p>Length of Employment at Discharge : ▼</p> <p>* Type of Residence : ▼</p> <p>* Living Arrangements : ▼</p> <p>* Primary Payment Source : ▼</p>
<p><b>9a</b></p>	<p>The Demographics section includes data on a client's education, employment, and type of residence, living arrangements at time of discharge, and the primary payment source.</p>	<p><b>Demographics</b></p> <p>Education at Admission : High School Diploma</p> <p>* Education at Discharge : <span style="border: 2px solid red; padding: 2px;">▼</span></p> <p>* Employment : ▼</p> <p>Length of Employment at Discharge : ▼</p> <p>* Type of Residence : ▼</p> <p>* Living Arrangements : ▼</p> <p>* Primary Payment Source : ▼</p>

Step	Instructions	Image
9b	<p>Here is what the Demographics section might look like once you have entered all the appropriate data.</p>	 <p><b>Demographics</b></p> <p>Education at Admission : High School Diploma</p> <p>* Education at Discharge : High School Diploma</p> <p>* Employment : Unemployed, Looking</p> <p>Length of Employment at Discharge :</p> <p>* Type of Residence : Homeless, Shelter</p> <p>* Living Arrangements : Living Alone</p> <p>* Primary Payment Source : Medicaid</p>
10	<p>The next section of data is titled Mental Health.</p> <p>Here is what they might look like once you have entered all the appropriate data.</p>	 <p><b>Mental Health</b></p> <p>* Co-existing Psychiatric Disorder : Yes</p> <p>* Ever Hospitalized for Mental Illness : No</p> <p>* Ever Treated for Mental Illness : No</p> <p>* Ever Hospitalized 30 or More Days for Mental Illness : No</p>
11	<p>The next sections are Gambling and Tobacco Goal Achievements. This is what the section might look like once you have entered all the data.</p>	 <p><b>Gambling and Tobacco Goal Achievements</b></p> <p>* Gambling : Not Applicable</p> <p>* Tobacco (Nicotine) : Not Applicable</p>

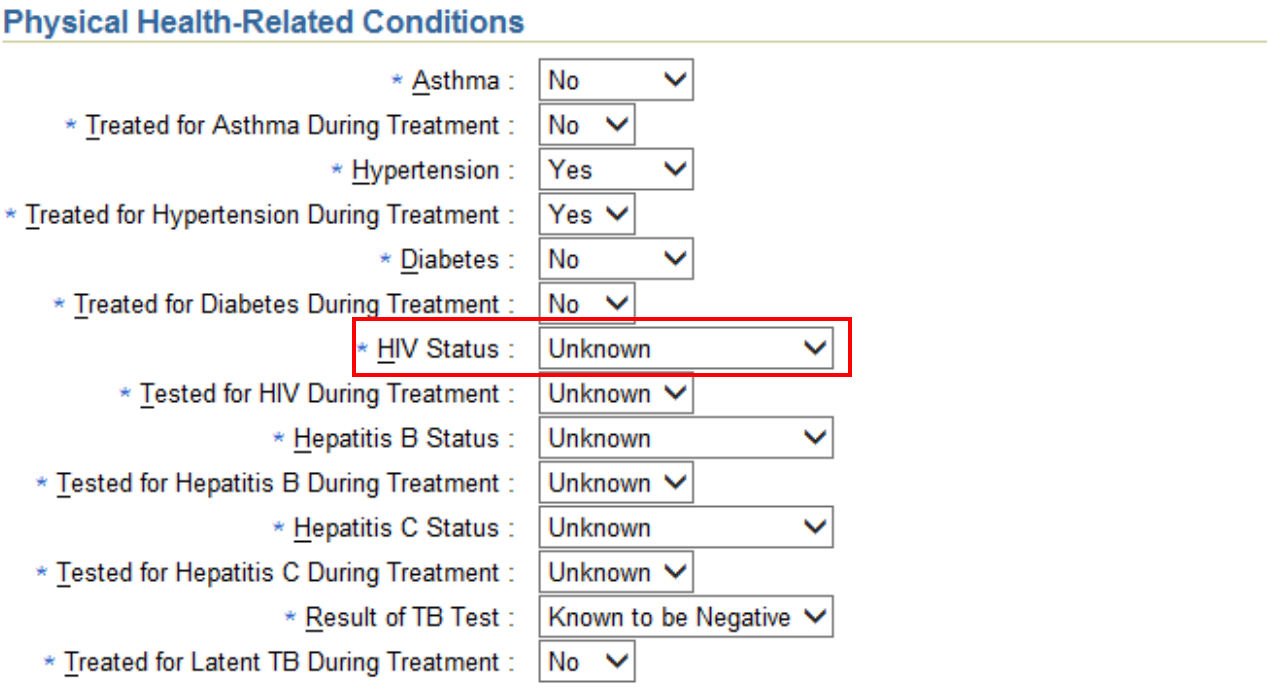
Step	Instructions	Image														
12	<p>The next section on treatment visits and counseling sessions is intended for use by non-opioid treatment outpatient programs.</p> <p>For outpatient programs, <b>Total Treatment Visits</b> must be greater than 0. The <b>Sessions</b> fields should not be left blank, i.e., enter 0 for these fields if 'none'. For residential programs and opioid treatment programs, leave all four fields <b>blank</b>.</p> <p>Here is what this section, Total Treatment Visits (for Outpatient Programs Only, excluding methadone), might look like when it is filled in (i.e., by a non-opioid outpatient treatment program).</p>	<p><b>Total Treatment Visits (for outpatient programs Only, excluding methadone)</b></p> <table border="1"> <tr> <td>Total Treatment Visits :</td> <td>46</td> </tr> <tr> <td>Individual Counseling Sessions :</td> <td>10</td> </tr> <tr> <td></td> <td>(Provided by a Primary Counselor)</td> </tr> <tr> <td>Group Counseling Sessions :</td> <td>28</td> </tr> <tr> <td></td> <td>(Provided by a Primary Counselor)</td> </tr> <tr> <td>Family Counseling Sessions :</td> <td>3</td> </tr> <tr> <td></td> <td>(Provided by any Direct Care Staff)</td> </tr> </table>	Total Treatment Visits :	46	Individual Counseling Sessions :	10		(Provided by a Primary Counselor)	Group Counseling Sessions :	28		(Provided by a Primary Counselor)	Family Counseling Sessions :	3		(Provided by any Direct Care Staff)
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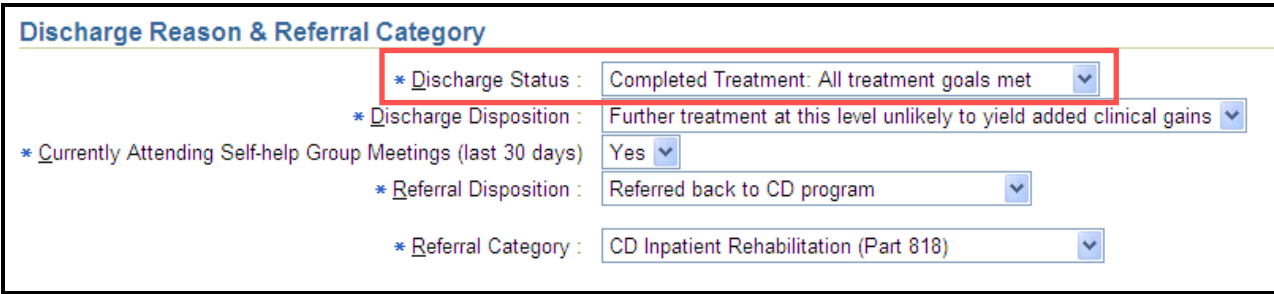
Step	Instructions	Image
13	<p>The next two related sections focus on arrests, incarcerations, and hospitalizations. These two sections are:</p> <ul style="list-style-type: none"> <li>Recent History, and</li> <li>Six Months Prior to Discharge (or during the treatment episode if stay was less than 6 months).</li> </ul> <p>The one section involves recent history and contains one additional field that reflects the number of arrests that occurred during the 30 days prior to discharge. Please note that the <b>Number of Arrests</b> (in prior six months) cannot be less than the <b>No. of Arrests in Prior 30 Days</b> (since the past six months includes the past 30 days). Otherwise, you will receive an error message upon saving the form.</p> <p>One other section contains five fields that refer to the period during the past six months prior to discharge. If the client was in treatment less than six months, the question refers to the period of treatment (i.e., less than six months).</p> <p>The example here shows how these two sections might look filled in.</p>	 <p><b>Recent History</b></p> <p>* <b>No. of Arrests in Prior 30 Days</b> (or during treatment if stay was less than 30 days) : <input type="text" value="1"/></p> <hr/> <p><b>Six Months Prior to Discharge (or during treatment if stay was less than 6 months)</b></p> <p>* <b>Number of Arrests</b> : <input type="text" value="1"/>                      * <b>Days Incarcerated</b> : <input type="text" value="0"/></p> <p>* <b>Days Hospitalized</b> : <input type="text" value="0"/>                      * <b>Days in Inpatient Detox</b> : <input type="text" value="0"/></p> <p>* <b>Number of ER Episodes</b> : <input type="text" value="1"/></p>

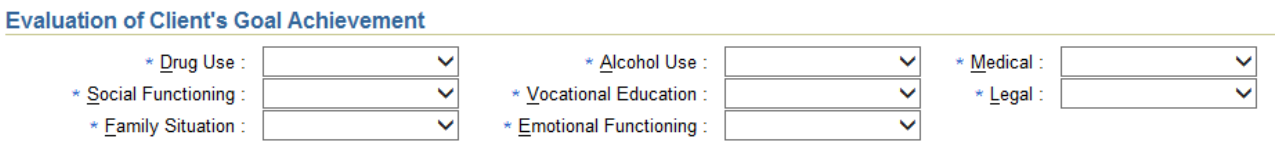
Step	Instructions	Image
14	<p>Next is the section on the Status of Problem Substances Reported at Admission.</p> <p>NOTE: The problem substances reported at admission are already shown on the left-hand side of the screen. For each of those substances, the data entered should reflect the frequency of use at discharge.</p> <p>If there was no related substance problem reported at admission (e.g., tertiary substance), the related frequency field on the right-hand side should be left blank. In this example, the frequency field would remain blank for the Tertiary Substance.</p>	 <p><b>Status of Problem Substances Reported at Admission</b></p> <p>Primary Substance : Alcohol      Frequency of Use at Discharge : No use in last 30 days ▼</p> <p>Secondary Substance : Alprazolam (Xanax)      Frequency of Use at Discharge : No use in last 30 days ▼</p> <p>Tertiary Substance : None      Frequency of Use at Discharge : ▼</p>
15	<p>This next section allows for reporting up to three additional problem substances that were not reported at admission. This section is titled Status of Different Problem Substances Used at Discharge and Not Reported at Admission (if any).</p> <p>For each additional problem substance added, record both the route of administration and the frequency of use.</p>	 <p><b>Status of Different Problem Substances Used and Not Reported at Admission (if any)</b></p> <p>First Problem Substance : Cocaine ▼      Route of Administration : Inhalation ▼      Frequency of Use : 3-6 times per week ▼</p> <p>Second Problem Substance : ▼      Route of Administration : ▼      Frequency of Use : ▼</p> <p>Third Problem Substance : ▼      Route of Administration : ▼      Frequency of Use : ▼</p>

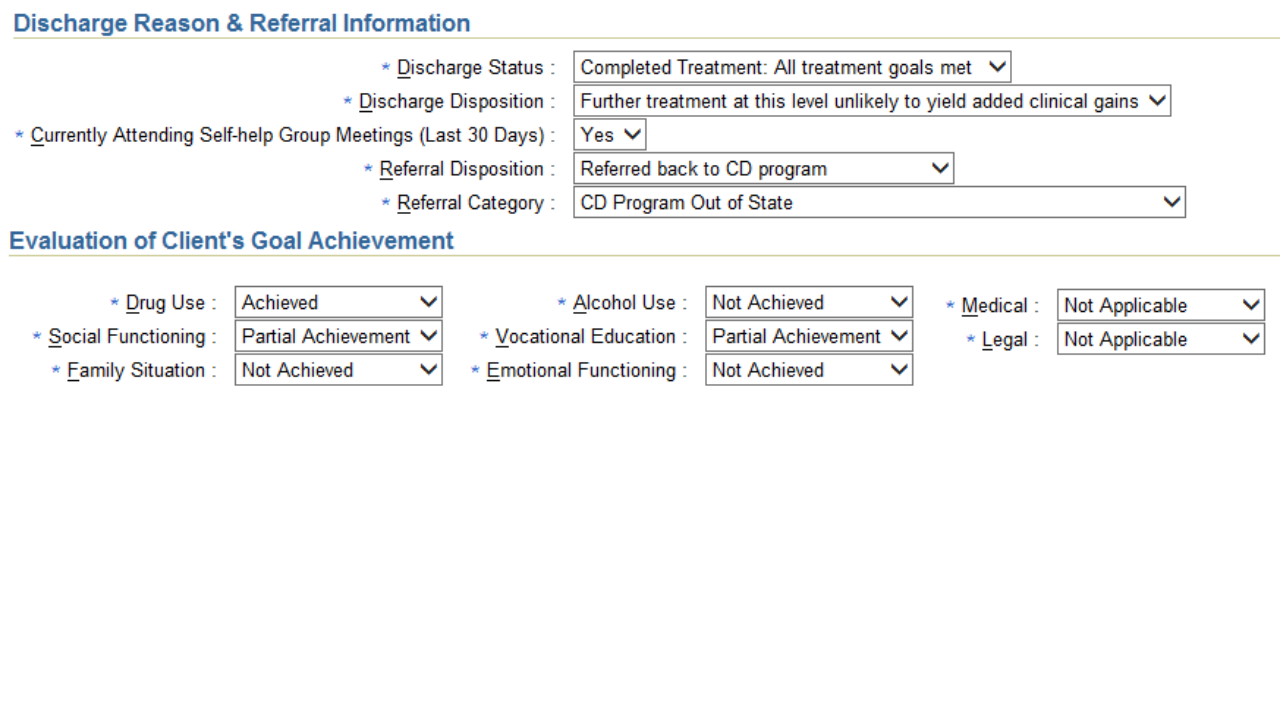
Step	Instructions	Image
15a	<p>This is how these two sections might look when properly filled in.</p> <p>The next two sections are Tobacco and Physical Health.</p>	<p><b>Status of Problem Substances Reported at Admission</b></p> <p>Primary Substance : Alcohol      Frequency of Use at Discharge : No use in last 30 days ▾</p> <p>Secondary Substance : Alprazolam (Xanax)      Frequency of Use at Discharge : No use in last 30 days ▾</p> <p>Tertiary Substance : None      Frequency of Use at Discharge : ▾</p> <hr/> <p><b>Status of Different Problem Substances Used and Not Reported at Admission (if any)</b></p> <p>First Problem Substance : Cocaine ▾      Route of Administration : Inhalation ▾</p> <p>Second Problem Substance : ▾      Frequency of Use : 3-6 times per week ▾</p> <p>Third Problem Substance : ▾      Route of Administration : ▾</p> <p>Frequency of Use : ▾</p>
16	<p>For the <b>Frequency of Tobacco Use</b>, if “No Use in the last 30 days” is selected, no information is entered in <b>Date Last Used</b>.</p>	<p><b>Tobacco</b></p> <hr/> <p>* <b>Frequency of Use (Past 30 Days)</b> : No use in last 30 days ▾  <small>(if stay is less than 30 days, since Admission or last Opioid Treatment Annual Update)</small></p> <p><b>Date Last Used</b> : <input type="text"/>  <small>(mm/yyyy - not entered if stay less than 30 days)</small></p> <p><b>Primary Route of Administration</b> : <input type="text"/> ▾</p>

Step	Instructions	Image
17	<p>If the client has not consented to the release of this information on the <i>Authorization for Release of Behavioral Health Information Form (TRS-61)</i> indicate “<b>Unknown</b>” for the HIV status question located under <b>Physical Health</b>.</p>	 <p><b>Physical Health-Related Conditions</b></p> <ul style="list-style-type: none"> <li>* <u>A</u>sthma : No ▾</li> <li>* <u>T</u>reated for Asthma During Treatment : No ▾</li> <li>* <u>H</u>ypertension : Yes ▾</li> <li>* <u>T</u>reated for Hypertension During Treatment : Yes ▾</li> <li>* <u>D</u>iabetes : No ▾</li> <li>* <u>T</u>reated for Diabetes During Treatment : No ▾</li> <li>* <u>H</u>IV Status : Unknown ▾</li> <li>* <u>T</u>ested for HIV During Treatment : Unknown ▾</li> <li>* <u>H</u>epatitis B Status : Unknown ▾</li> <li>* <u>T</u>ested for Hepatitis B During Treatment : Unknown ▾</li> <li>* <u>H</u>epatitis C Status : Unknown ▾</li> <li>* <u>T</u>ested for Hepatitis C During Treatment : Unknown ▾</li> <li>* <u>R</u>esult of TB Test : Known to be Negative ▾</li> <li>* <u>T</u>reated for Latent TB During Treatment : No ▾</li> </ul>

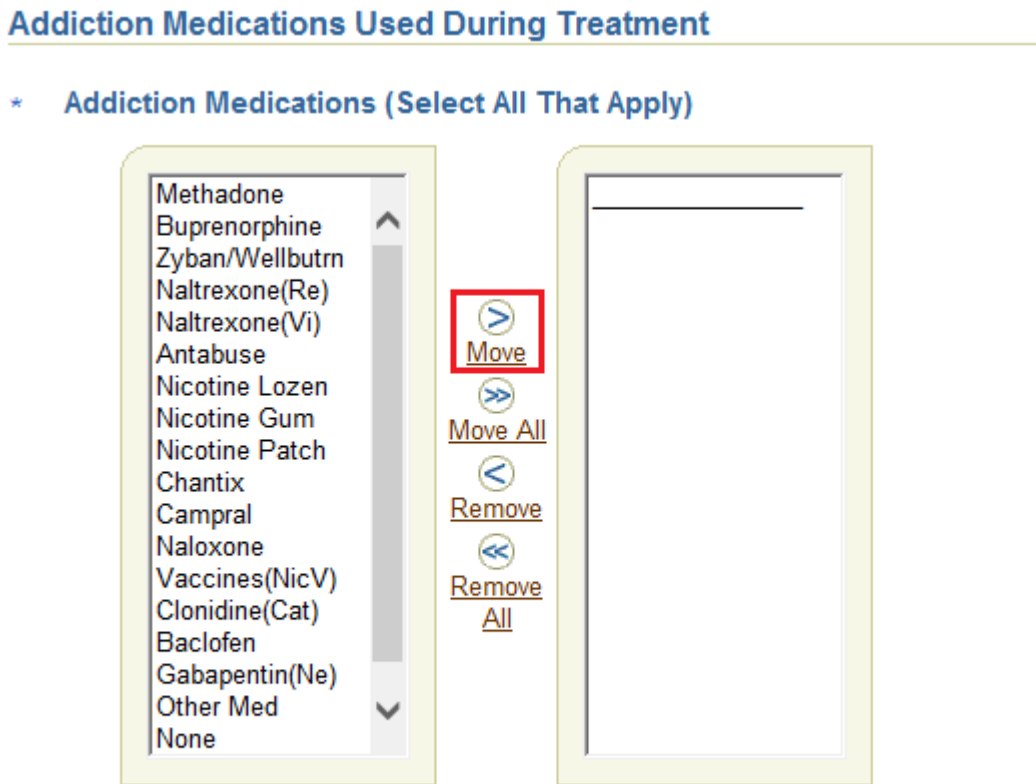
Step	Instructions	Image
18	<p>Next are two related sections:</p> <ol style="list-style-type: none"> <li>1) Discharge Reason &amp; Referral Category</li> <li>2) Evaluation of Client's Goal Achievement</li> </ol> <p>The data entered must be consistent and meet cross-edit rules built into the system. Violations of these rules will result in error messages upon saving the form.</p> <p>For more details on appropriate code combinations, you may download two documents detailing the cross-edits. These are found on the <a href="#">OASAS Applications</a> site under the "CDS Documentation" section. Under the "Forms and Instructions" tab you will find the following related documents:</p> <ul style="list-style-type: none"> <li>▪ Discharge Edit Codes</li> <li>▪ Discharge Status/Goal Achievement Cross Edits</li> </ul>	<p>The screenshot displays two sections of a web form. The first section, titled "Discharge Reason &amp; Referral Information", contains five dropdown menus: "Discharge Status", "Discharge Disposition", "Currently Attending Self-help Group Meetings (Last 30 Days)", "Referral Disposition", and "Referral Category". The second section, titled "Evaluation of Client's Goal Achievement", contains six dropdown menus: "Drug Use", "Alcohol Use", "Medical", "Social Functioning", "Vocational Education", and "Legal". The "Family Situation" dropdown is partially visible at the bottom left of this section.</p>

Step	Instructions	Image
18a	<p>For the purposes of this User Guide, we have entered an error for <b>Discharge Status</b> to illustrate how an error in one field may be inconsistent with several other fields and cause multiple errors.</p> <p>In the Fixing Errors section of this User Guide, this error will be corrected. You will also see how correcting this one error will resolve the other related errors.</p>	 <p>The screenshot shows a form titled "Discharge Reason &amp; Referral Category" with the following fields:</p> <ul style="list-style-type: none"> <li>* <b>Discharge Status</b> : Completed Treatment: All treatment goals met (highlighted with a red box)</li> <li>* <b>Discharge Disposition</b> : Further treatment at this level unlikely to yield added clinical gains</li> <li>* <b>Currently Attending Self-help Group Meetings (last 30 days)</b> : Yes</li> <li>* <b>Referral Disposition</b> : Referred back to CD program</li> <li>* <b>Referral Category</b> : CD Inpatient Rehabilitation (Part 818)</li> </ul>

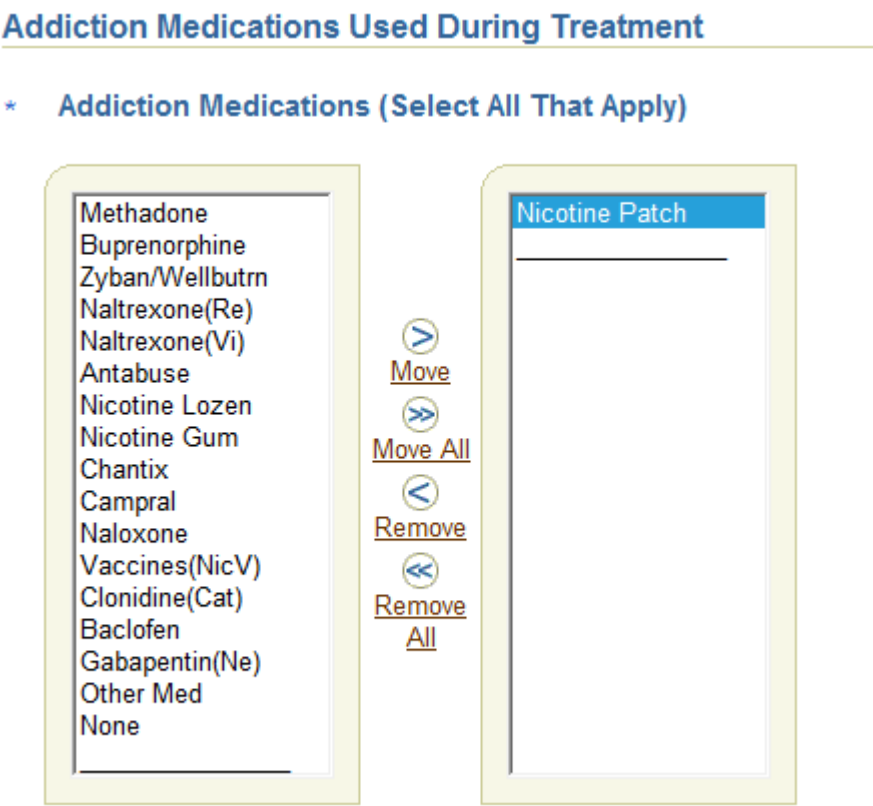
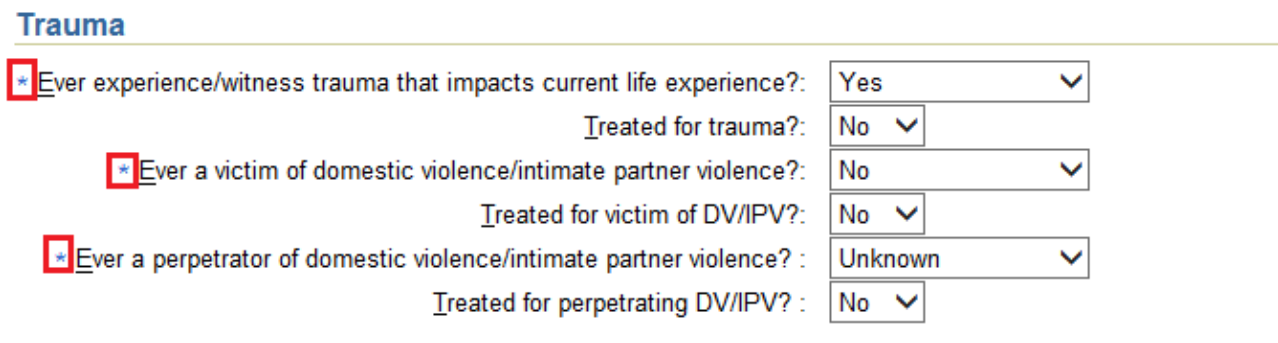
Step	Instructions	Image
19	<p>We now move to the second related section, Evaluation of Client’s Goal Achievement. This section should reflect the clinician’s judgment about how well the client has achieved specific set goals at the time of client discharge.</p> <p>Because treatment programs serve clients with diverse needs, not all goal areas listed are applicable for every client. If the clinician determined during treatment that a goal did not apply to the client, the answer chosen for that goal should be “Not Applicable.”</p> <p>The ratings assigned to the <a href="#">Client’s Goal Achievement</a>, as well as <a href="#">Discharge Status</a>, must be supported by information documented in the client’s case record.</p> <p>As already noted, data entered here will be checked by the system for consistency to answers in the previous section.</p>	 <p>The image shows a screenshot of a web-based form titled "Evaluation of Client's Goal Achievement". The form contains eight dropdown menus arranged in two columns. The first column includes: * Drug Use, * Social Functioning, and * Family Situation. The second column includes: * Alcohol Use, * Vocational Education, * Emotional Functioning, * Medical, and * Legal. Each dropdown menu has a small downward-pointing arrow on its right side.</p>

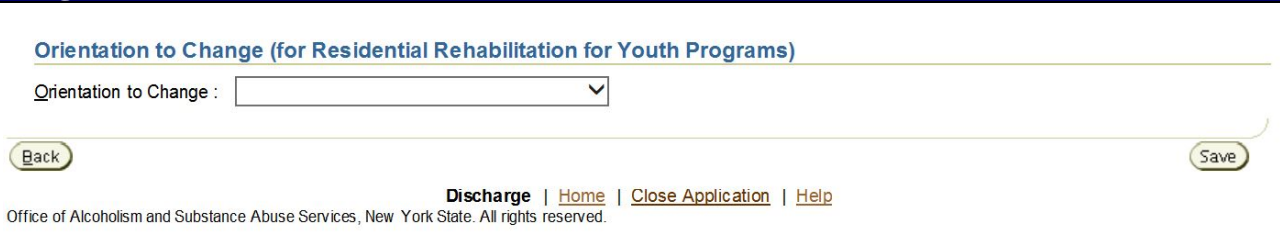
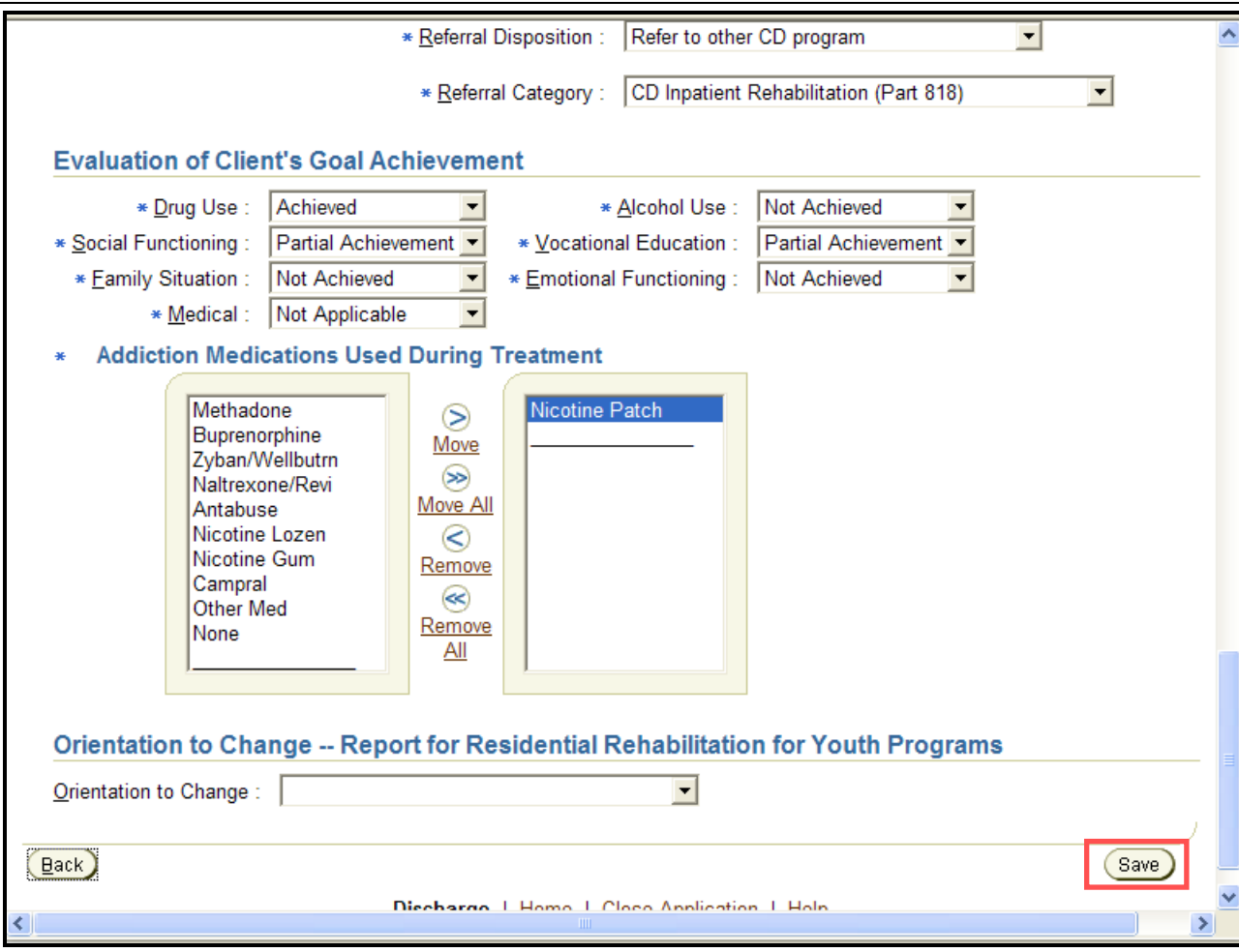
Step	Instructions	Image
20	<p>This is how the two sections Discharge Reason &amp; Referral Category and Evaluation of Client’s Goal Achievement might look when they are filled in.</p> <p>NOTE: Some of the data entered in the Evaluation of Client’s Goal Achievement section will conflict with the data entered for <b>Discharge Status</b> in the previous section. This is because <b>Discharge Status</b> cannot be “Treatment Complete: All Goals Met” if any Goal Achievement fields indicate “<b>Not Achieved</b>” or “<b>Partial Achievement.</b>” This error will later help illustrate what happens when cross-edit rules are violated and how to correct them.</p>	 <p>The screenshot displays two sections of a form. The first section, 'Discharge Reason &amp; Referral Information', contains the following fields: 'Discharge Status' (Completed Treatment: All treatment goals met), 'Discharge Disposition' (Further treatment at this level unlikely to yield added clinical gains), 'Currently Attending Self-help Group Meetings (Last 30 Days)' (Yes), 'Referral Disposition' (Referred back to CD program), and 'Referral Category' (CD Program Out of State). The second section, 'Evaluation of Client's Goal Achievement', contains several fields: 'Drug Use' (Achieved), 'Alcohol Use' (Not Achieved), 'Medical' (Not Applicable), 'Social Functioning' (Partial Achievement), 'Vocational Education' (Partial Achievement), 'Legal' (Not Applicable), 'Family Situation' (Not Achieved), and 'Emotional Functioning' (Not Achieved).</p>



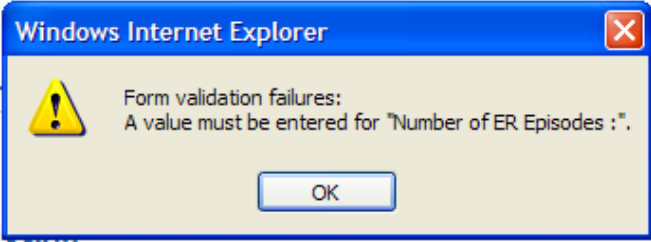
Step	Instructions	Image
21	<p>We will now move to the section titled Addiction Medications Used During Treatment, where you can enter any/all addiction medications that the client used during treatment.</p> <p>You can select the applicable addiction medications used by choosing one of the following methods:</p> <ol style="list-style-type: none"> <li>1) To select each, you can click the mouse on the addiction medication and then click <b>Move</b> to move the chosen item over to the selection box on the right.</li> <li>2) Another method is to double-click on a substance to move it to the selection box on the right.</li> <li>3) If you are selecting multiple medications, you should hold down the <b>Ctrl</b> button and click on multiple selected choices. Then click "<b>Move.</b>"</li> </ol>	 <p>The screenshot displays the 'Addiction Medications Used During Treatment' section. At the top, there is a title 'Addiction Medications Used During Treatment' followed by a sub-header '* Addiction Medications (Select All That Apply)'. Below this, there are two main components: a list of medications on the left and a selection box on the right. The list of medications includes: Methadone, Buprenorphine, Zyban/Wellbutrn, Naltrexone(Re), Naltrexone(Vi), Antabuse, Nicotine Lozen, Nicotine Gum, Nicotine Patch, Chantix, Campral, Naloxone, Vaccines(NicV), Clonidine(Cat), Baclofen, Gabapentin(Ne), Other Med, and None. To the right of the list are four buttons: 'Move' (highlighted with a red box), 'Move All', 'Remove', and 'Remove All'. The selection box on the right is currently empty.</p>

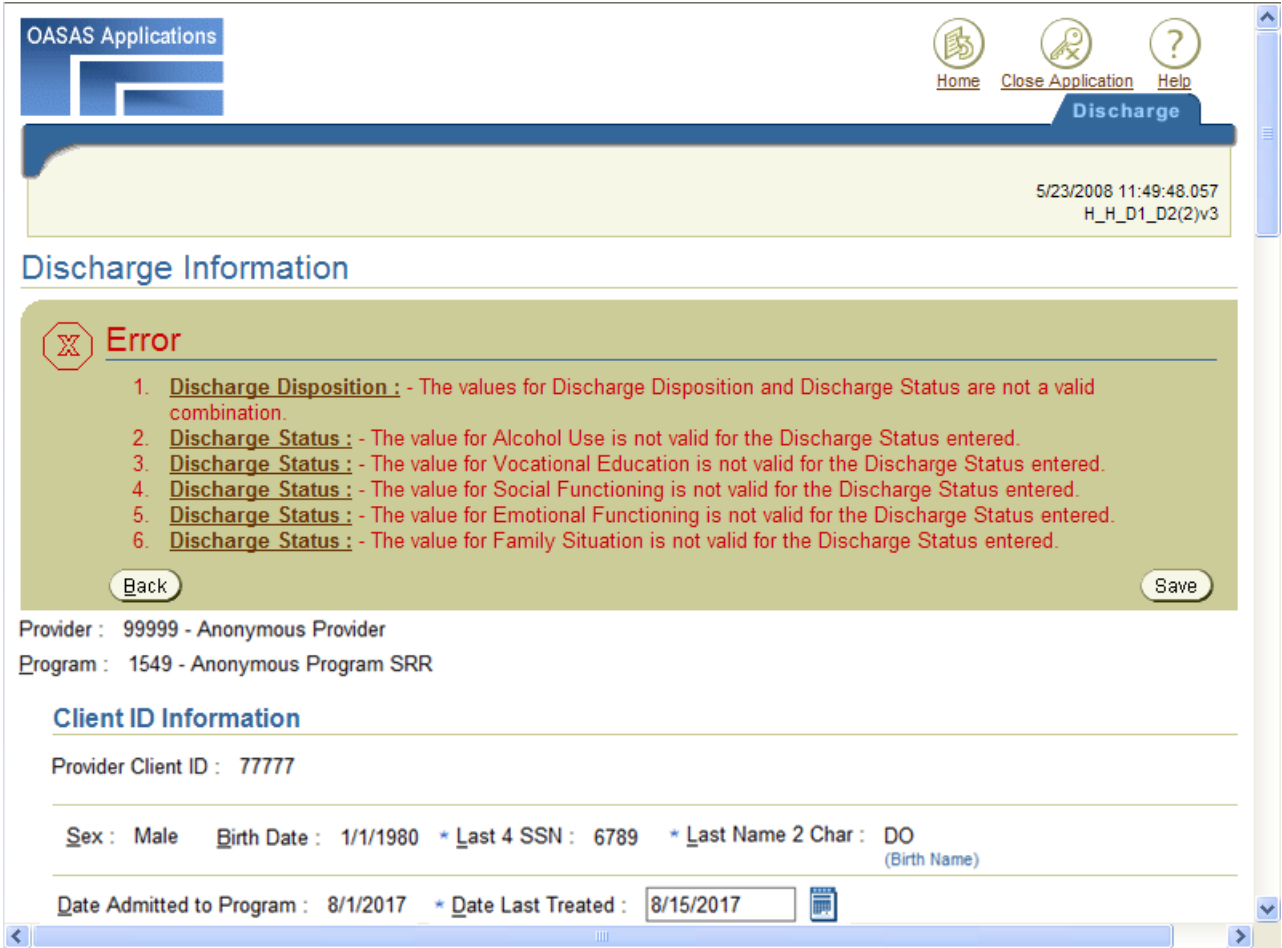
Step	Instructions	Image
21a	<p>NOTE: If you make a mistake, you can move a medication back to the left-hand box by selecting it and clicking <b>Remove</b>.</p> <p>To remove all items in the right-hand box, click <b>Remove All</b>.</p>	<p>The screenshot displays the 'Addiction Medications Used During Treatment' interface. At the top, there is a title 'Addiction Medications Used During Treatment' followed by a sub-header '* Addiction Medications (Select All That Apply)'. Below this, there are two main components: a list of medications on the left and a target box on the right. The medication list includes: Methadone, Buprenorphine, Zyban/Wellbutrn, Naltrexone(Re), Naltrexone(Vi), Antabuse, Nicotine Lozen, Nicotine Gum, Nicotine Patch, Chantix, Campral, Naloxone, Vaccines(NicV), Clonidine(Cat), Baclofen, Gabapentin(Ne), Other Med, and None. Between the two boxes are five action buttons: 'Move' (with a right arrow), 'Move All' (with a double right arrow), 'Remove' (with a left arrow), 'Remove All' (with a double left arrow), and 'All'. A red rectangular box highlights the 'Remove' and 'Remove All' buttons.</p>

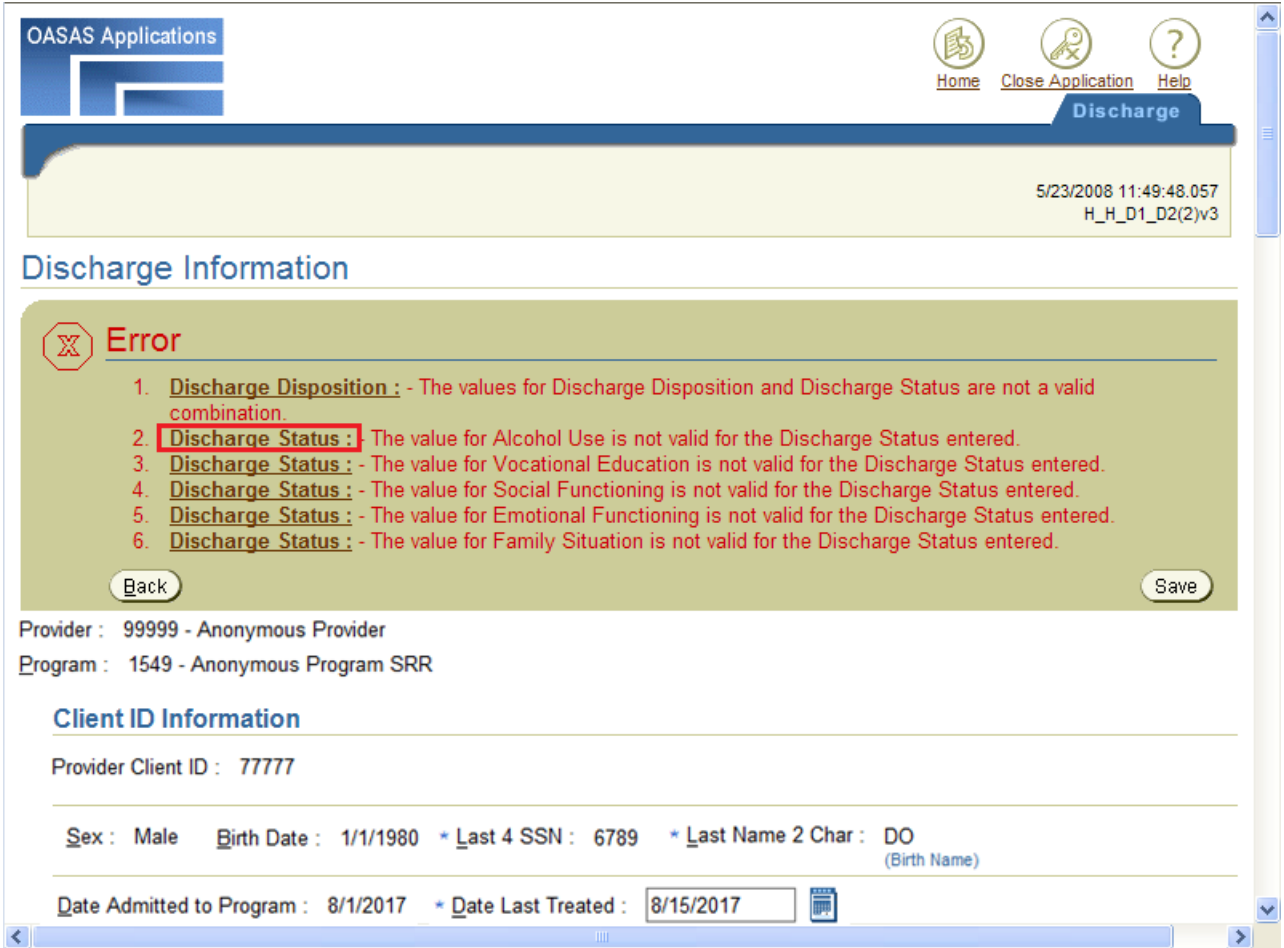
Step	Instructions	Image
21b	<p>This is how the Addiction Medications Used During Treatment section might look once it is filled in.</p>	 <p style="text-align: center;"><b>Addiction Medications Used During Treatment</b></p> <p style="text-align: center;">* <b>Addiction Medications (Select All That Apply)</b></p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid #ccc; padding: 5px; width: 40%;"> <p>Methadone Buprenorphine Zyban/Wellbutrn Naltrexone(Re) Naltrexone(Vi) Antabuse Nicotine Lozen Nicotine Gum Chantix Campral Naloxone Vaccines(NicV) Clonidine(Cat) Baclofen Gabapentin(Ne) Other Med None</p> </div> <div style="text-align: center;"> <p>&gt; Move</p> <p>&gt;&gt; Move All</p> <p>&lt; Remove</p> <p>&lt;&lt; Remove All</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 40%; background-color: #f9f9f9;"> <p style="background-color: #2196f3; color: white; padding: 2px;">Nicotine Patch</p> <hr style="border: 0.5px solid #ccc;"/> </div> </div>
22	<p>In this section, <i>Trauma</i>, enter all information as appropriate.</p> <p>Remember: the asterisk (*) indicates required fields.</p>	 <p><b>Trauma</b></p> <p><input checked="" type="checkbox"/> Ever experience/witness trauma that impacts current life experience?: Yes ▾</p> <p style="padding-left: 150px;">Treated for trauma?: No ▾</p> <p><input checked="" type="checkbox"/> Ever a victim of domestic violence/intimate partner violence?: No ▾</p> <p style="padding-left: 150px;">Treated for victim of DV/IPV?: No ▾</p> <p><input checked="" type="checkbox"/> Ever a perpetrator of domestic violence/intimate partner violence? : Unknown ▾</p> <p style="padding-left: 150px;">Treated for perpetrating DV/IPV? : No ▾</p>

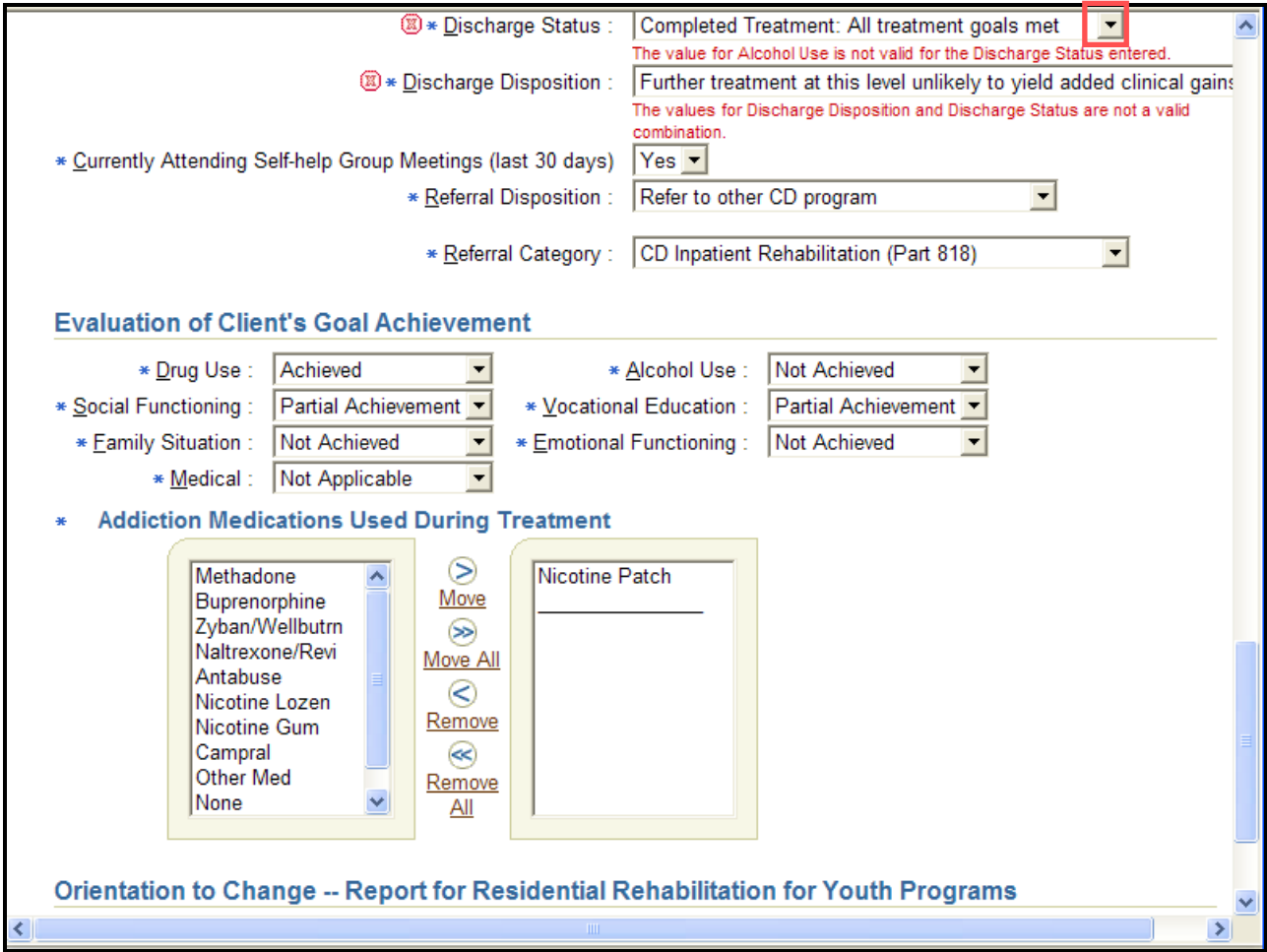
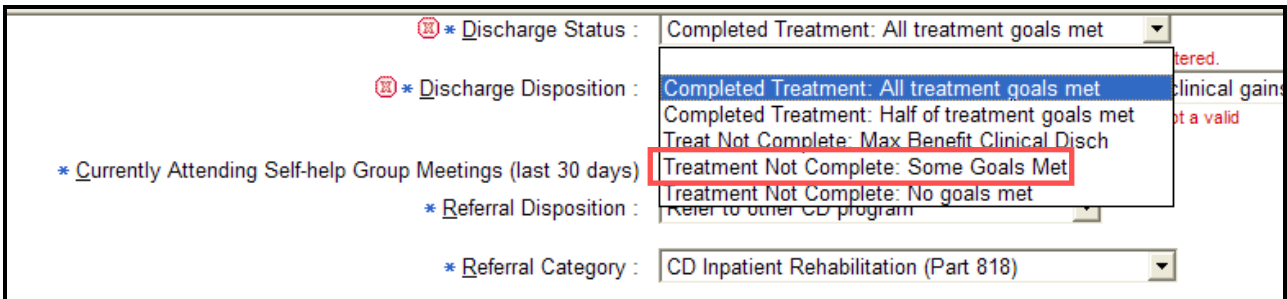
Step	Instructions	Image
23	<p>NOTE: <b>Orientation to Change</b> is usually left blank. It is only reported by a limited number of programs that serve youth.</p>	 <p><b>Orientation to Change (for Residential Rehabilitation for Youth Programs)</b></p> <p>Orientation to Change : <input type="text"/></p> <p><input type="button" value="Back"/> <input type="button" value="Save"/></p> <p><a href="#">Discharge</a>   <a href="#">Home</a>   <a href="#">Close Application</a>   <a href="#">Help</a> Office of Alcoholism and Substance Abuse Services, New York State. All rights reserved.</p>
24	<p>Once the discharge information is completed, you must save the data.</p> <p>Click the <b>Save</b> button and the system will first verify that you have entered all the required fields.</p>	 <p>* Referral Disposition : <input type="text" value="Refer to other CD program"/></p> <p>* Referral Category : <input type="text" value="CD Inpatient Rehabilitation (Part 818)"/></p> <p><b>Evaluation of Client's Goal Achievement</b></p> <p>* Drug Use : <input type="text" value="Achieved"/>      * Alcohol Use : <input type="text" value="Not Achieved"/></p> <p>* Social Functioning : <input type="text" value="Partial Achievement"/>      * Vocational Education : <input type="text" value="Partial Achievement"/></p> <p>* Family Situation : <input type="text" value="Not Achieved"/>      * Emotional Functioning : <input type="text" value="Not Achieved"/></p> <p>* Medical : <input type="text" value="Not Applicable"/></p> <p>* <b>Addiction Medications Used During Treatment</b></p> <div style="border: 1px solid gray; padding: 5px; width: fit-content;"> <p>Methadone Buprenorphine Zyban/Wellbutrn Naltrexone/Revi Antabuse Nicotine Lozen Nicotine Gum Campral Other Med None</p> </div> <p style="text-align: center;"> <input type="button" value="Move"/> <input type="button" value="Move All"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/> </p> <div style="border: 1px solid gray; padding: 5px; width: fit-content;"> <p>Nicotine Patch</p> </div> <p><b>Orientation to Change -- Report for Residential Rehabilitation for Youth Programs</b></p> <p>Orientation to Change : <input type="text"/></p> <p><input type="button" value="Back"/> <input type="button" value="Save"/></p> <p><a href="#">Discharge</a>   <a href="#">Home</a>   <a href="#">Close Application</a>   <a href="#">Help</a></p>

## Fixing Errors

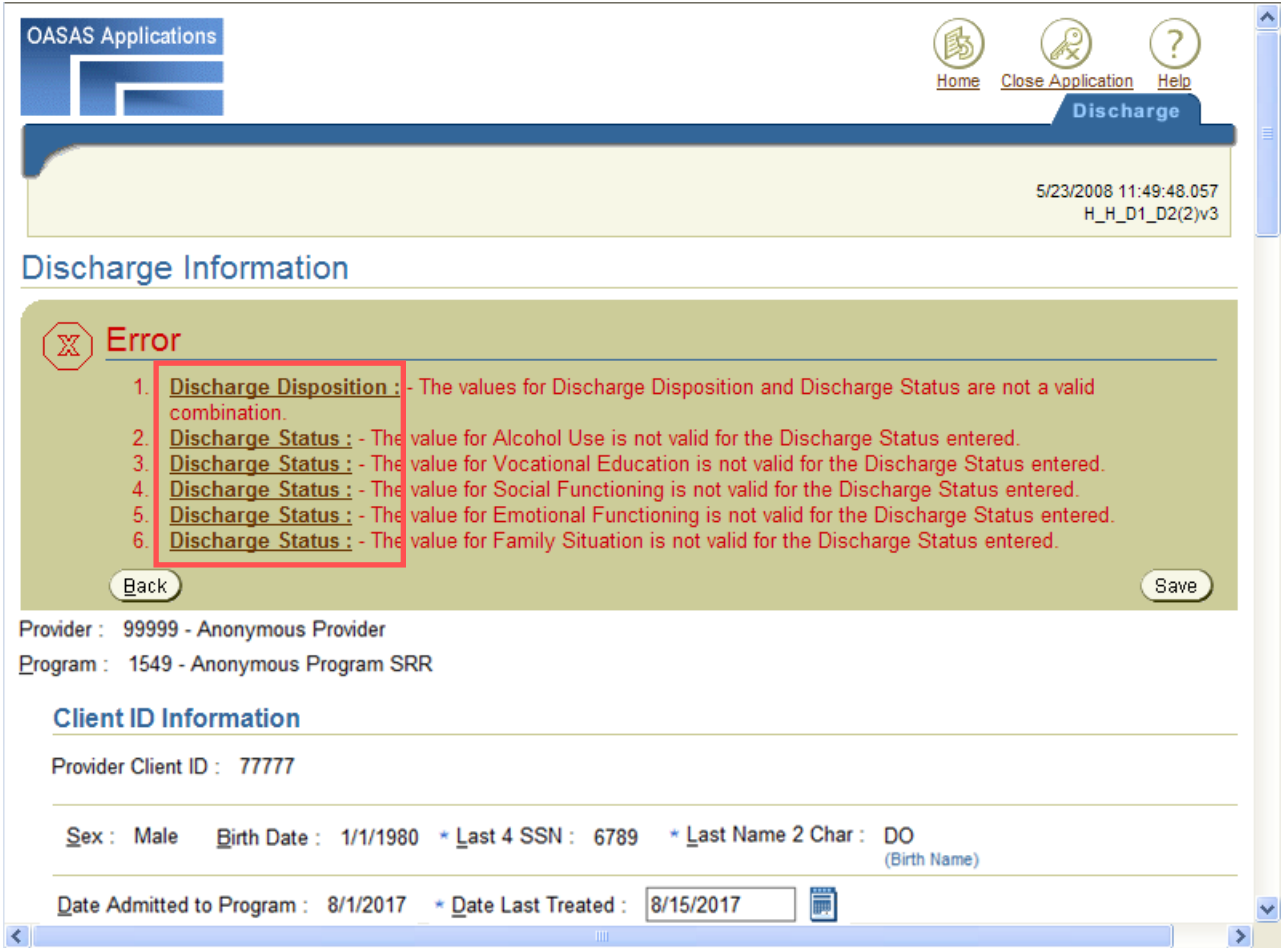
Step	Instructions	Image
25	<p>If any required fields were left blank, you would first see a pop-up error message indicating those fields' still requiring data, as in the pop-up example shown to the right. It may refer to one or more fields.</p> <p>If this happens, you would click the <b>OK</b> button to close the message window and then enter the required data. Once entered, you would then click the <b>Save</b> button to save the changes (e.g., as shown in the "Enter an Admission" User Guide).</p> <p>NOTE: For the discharge example in this User Guide, there are no missing required fields, so there is no pop-up window.</p>	

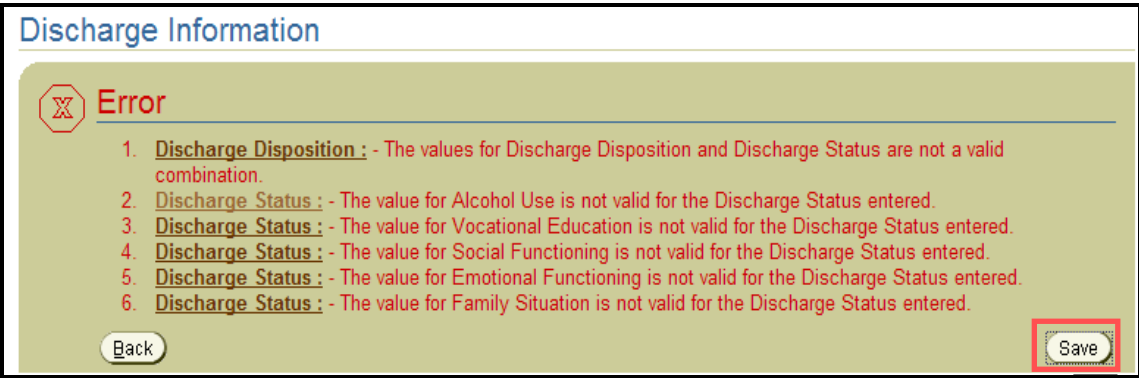
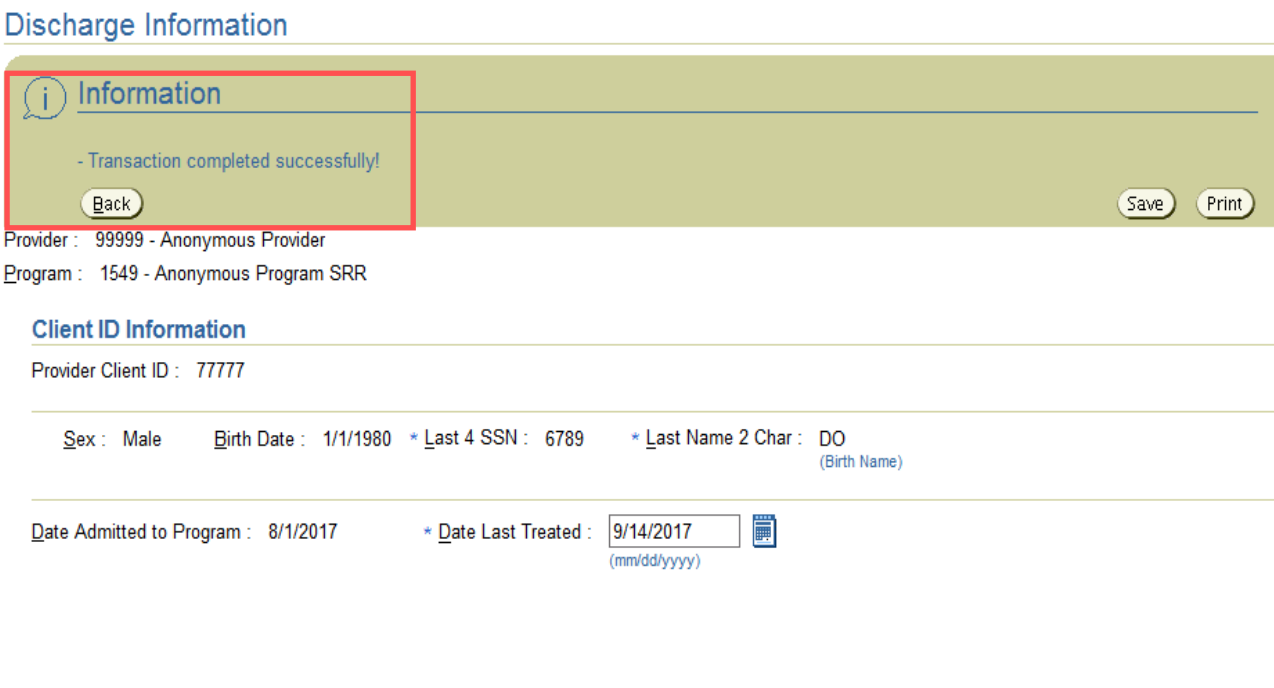
Step	Instructions	Image
26	<p>After any missing data are completed and saved (if applicable), then the system checks for invalid data.</p> <p>If errors are detected, error messages appear at the top of the page. Fields in error will be marked with a red <b>X</b> and display the error message. The name of the field is the link to move to that field on the page. This will save you time when correcting errors.</p> <p>In this User Guide example, the incorrect data is in the field <b>Discharge Status</b> (rather than <b>Discharge Disposition</b>). <b>Discharge Status</b> should be “Treatment Not Complete: Some Goals Met.” The initial answer “Completed Treatment: All treatment goals met” is causing multiple error messages. It conflicts with both <b>Discharge Disposition</b> as well as several of the client’s Goal Achievements.</p> <p>For instance, the status “All treatment goals met” can be used only if all the client’s Goal Achievements were “Achieved.” These errors occurred since several of the client’s Goal Achievements indicate “Not Achieved” or “Partial Achievement” (e.g., family situation, alcohol use, vocational education, and emotional functioning).</p>	 <p>The screenshot shows the OASAS Applications interface. At the top, there are navigation icons for Home, Close Application, and Help. The page title is "Discharge" and the timestamp is "5/23/2008 11:49:48.057 H_H_D1_D2(2)v3". The main section is "Discharge Information" and contains an "Error" message with a red 'X' icon. The error message lists six items:</p> <ol style="list-style-type: none"> <li>1. <b>Discharge Disposition</b> : - The values for Discharge Disposition and Discharge Status are not a valid combination.</li> <li>2. <b>Discharge Status</b> : - The value for Alcohol Use is not valid for the Discharge Status entered.</li> <li>3. <b>Discharge Status</b> : - The value for Vocational Education is not valid for the Discharge Status entered.</li> <li>4. <b>Discharge Status</b> : - The value for Social Functioning is not valid for the Discharge Status entered.</li> <li>5. <b>Discharge Status</b> : - The value for Emotional Functioning is not valid for the Discharge Status entered.</li> <li>6. <b>Discharge Status</b> : - The value for Family Situation is not valid for the Discharge Status entered.</li> </ol> <p>Below the error message are "Back" and "Save" buttons. Further down, the page shows "Provider : 99999 - Anonymous Provider" and "Program : 1549 - Anonymous Program SRR". The "Client ID Information" section includes "Provider Client ID : 77777". At the bottom, there are fields for "Sex : Male", "Birth Date : 1/1/1980", "Last 4 SSN : 6789", "Last Name 2 Char : DO (Birth Name)", "Date Admitted to Program : 8/1/2017", and "Date Last Treated : 8/15/2017".</p>

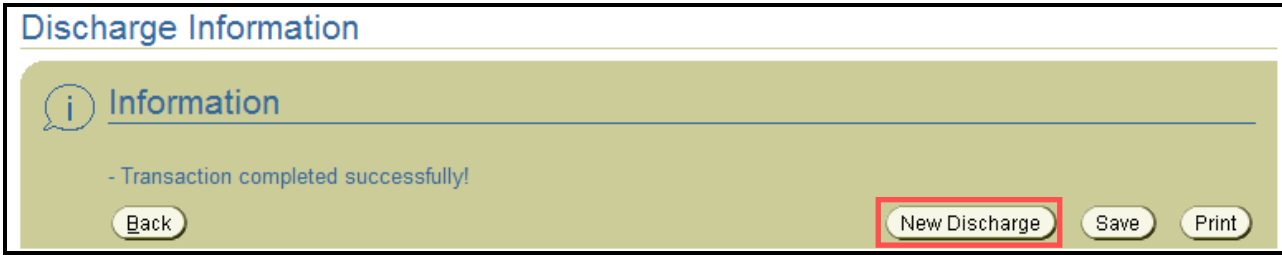


Step	Instructions	Image
27	To correct the error in this example, you would click the link in the second error message that is labeled “Discharge Status” to move to that field.	 <p>The screenshot shows the OASAS Applications interface. At the top, there are navigation icons for Home, Close Application, and Help, along with a 'Discharge' tab. The main content area is titled 'Discharge Information' and contains an error message. The error message is titled 'Error' and lists six items, each starting with 'Discharge Status'. The second item, 'Discharge Status', is highlighted in red. Below the error message are 'Back' and 'Save' buttons. At the bottom, there is client information including 'Provider: 99999 - Anonymous Provider', 'Program: 1549 - Anonymous Program SRR', and 'Client ID Information' with fields for Sex, Birth Date, Last 4 SSN, Last Name 2 Char, and Date Admitted to Program.</p>

Step	Instructions	Image
28	<p>You would then be moved to the area where the field is located, as in this example.</p> <p>To correct this field in error (e.g., <a href="#">Discharge Status</a>), you would click the <b>down arrow</b> to open the <a href="#">Discharge Status</a> dropdown list.</p>	 <p>The screenshot shows a form with several fields. The 'Discharge Status' field is set to 'Completed Treatment: All treatment goals met'. A red box highlights the dropdown arrow. Below this field, there are error messages: 'The value for Alcohol Use is not valid for the Discharge Status entered.' and 'The values for Discharge Disposition and Discharge Status are not a valid combination.' Other fields include 'Discharge Disposition' (Further treatment at this level unlikely to yield added clinical gains), 'Currently Attending Self-help Group Meetings (last 30 days)' (Yes), 'Referral Disposition' (Refer to other CD program), and 'Referral Category' (CD Inpatient Rehabilitation (Part 818)). Below these are sections for 'Evaluation of Client's Goal Achievement' with various goal status dropdowns (e.g., Drug Use: Achieved, Alcohol Use: Not Achieved) and 'Addiction Medications Used During Treatment' with a list of medications and a 'Move' button.</p>
29	<p>You would then select the correct response (e.g., “<b>Treatment Not Complete: Some Goals Met</b>” from the <a href="#">Discharge Status</a> dropdown list).</p>	 <p>This screenshot shows the same form as the previous one, but the 'Discharge Status' dropdown menu is open. The option 'Treatment Not Complete: Some Goals Met' is highlighted with a red box. Other options visible in the dropdown include 'Completed Treatment: All treatment goals met', 'Completed Treatment: Half of treatment goals met', and 'Treatment Not Complete: Max Benefit Clinical Disch'. The error messages from the previous screenshot are still visible.</p>



Step	Instructions	Image
30	<p>If there were other errors to correct, you would then move to the next field in error by scrolling to the top of the page and clicking on the next link in the error message or by clicking directly on the field.</p> <p>NOTE: If you suspect that one field may be causing multiple errors (as in this example), you could then save the form first to confirm whether other errors still required correcting.</p>	 <p>The screenshot shows the OASAS Applications interface. At the top, there are navigation links for Home, Close Application, and Help. The page title is 'Discharge' and the timestamp is '5/23/2008 11:49:48.057 H_H_D1_D2(2)v3'. The main section is 'Discharge Information'. An error message is displayed, listing six items, all related to 'Discharge Status' being invalid for various reasons. The first item, 'Discharge Disposition', is highlighted with a red box. Below the error message are 'Back' and 'Save' buttons. The provider information is '99999 - Anonymous Provider' and the program is '1549 - Anonymous Program SRR'. The client ID information includes 'Provider Client ID : 77777', 'Sex : Male', 'Birth Date : 1/1/1980', '* Last 4 SSN : 6789', and '* Last Name 2 Char : DO (Birth Name)'. The date admitted to the program is '8/1/2017' and the date last treated is '8/15/2017'.</p>

Step	Instructions	Image
31	<p>To save the correction and determine if there are any remaining errors, you could click the <b>Save</b> button at the top or bottom of the screen.</p>	 <p><b>Discharge Information</b></p> <p><b>Error</b></p> <ol style="list-style-type: none"> <li><b>Discharge Disposition</b> : - The values for Discharge Disposition and Discharge Status are not a valid combination.</li> <li><b>Discharge Status</b> : - The value for Alcohol Use is not valid for the Discharge Status entered.</li> <li><b>Discharge Status</b> : - The value for Vocational Education is not valid for the Discharge Status entered.</li> <li><b>Discharge Status</b> : - The value for Social Functioning is not valid for the Discharge Status entered.</li> <li><b>Discharge Status</b> : - The value for Emotional Functioning is not valid for the Discharge Status entered.</li> <li><b>Discharge Status</b> : - The value for Family Situation is not valid for the Discharge Status entered.</li> </ol> <p>Buttons: Back, Save</p>
32	<p>When the transaction has been saved successfully without error, you will see the following confirmation message: “Transaction completed successfully!”</p> <p>NOTE: All other related errors disappeared in this example.</p>	 <p><b>Discharge Information</b></p> <p><b>Information</b></p> <p>- Transaction completed successfully!</p> <p>Buttons: Back, Save, Print</p> <p>Provider : 99999 - Anonymous Provider          Program : 1549 - Anonymous Program SRR</p> <p><b>Client ID Information</b></p> <p>Provider Client ID : 77777</p> <p>Sex : Male    Birth Date : 1/1/1980    * Last 4 SSN : 6789    * Last Name 2 Char : DO (Birth Name)</p> <p>Date Admitted to Program : 8/1/2017    * Date Last Treated : 9/14/2017 (mm/dd/yyyy)</p>

Step	Instructions	Image
33	If you need to enter another discharge, you would click the <b>New Discharge</b> button.	 <p>The screenshot shows a web interface titled "Discharge Information". Below the title is a green banner with an information icon and the word "Information". A message below the banner reads "- Transaction completed successfully!". At the bottom of the interface, there are three buttons: "Back", "New Discharge" (highlighted with a red box), "Save", and "Print".</p>
34	To return to the " <i>CDS Home</i> " page to perform a different task, you would click <b>Home</b> at the top of the page.	 <p>The screenshot shows a navigation bar with three buttons: "Home" (highlighted with a red box), "Close Application", and "Help". Below these buttons is a blue bar with the word "Discharge".</p>
35	Once you are finished entering transactions, you can return to the <i>OASAS Applications</i> page by clicking on the <b>Close Application</b> button to exit the application.	 <p>The screenshot shows a navigation bar with three buttons: "Home", "Close Application" (highlighted with a red box), and "Help". Below these buttons is a blue bar with the word "Discharge".</p>