

“Enter a CDS Element Transition” 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 element transition for Part 820 Residential Programs into the Client Data System (CDS). This User Guide is intended for external OASAS Applications users only.

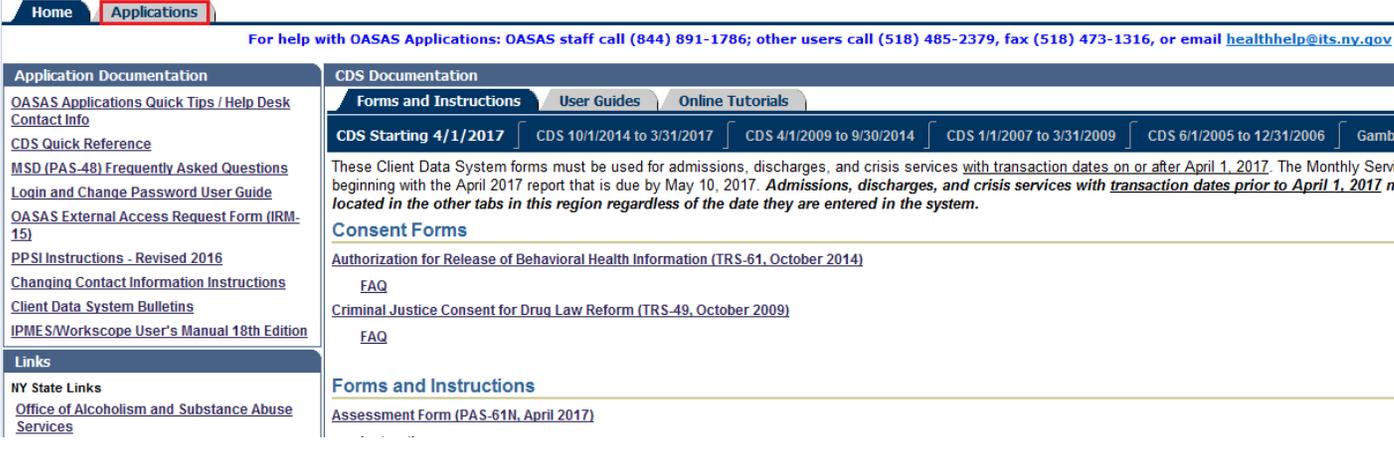
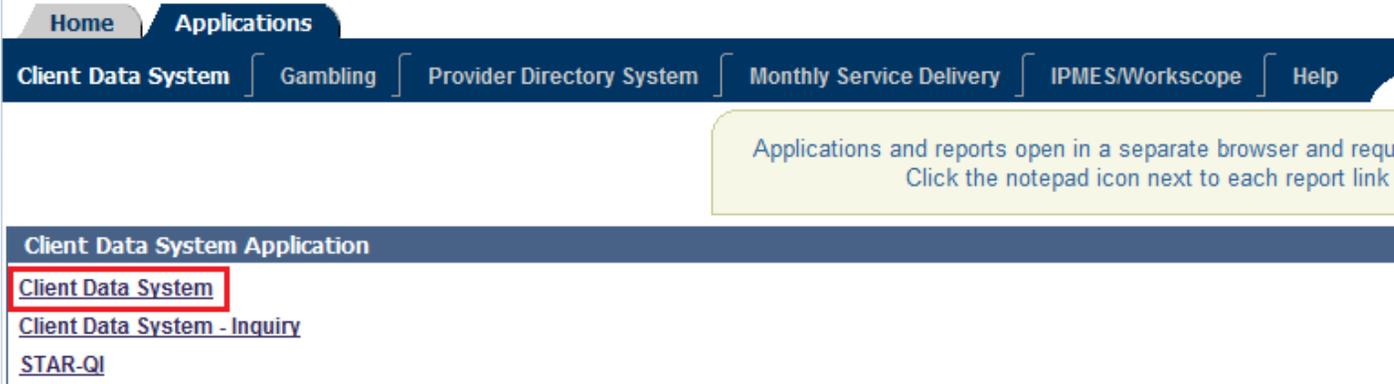
There are four topics in this User Guide:

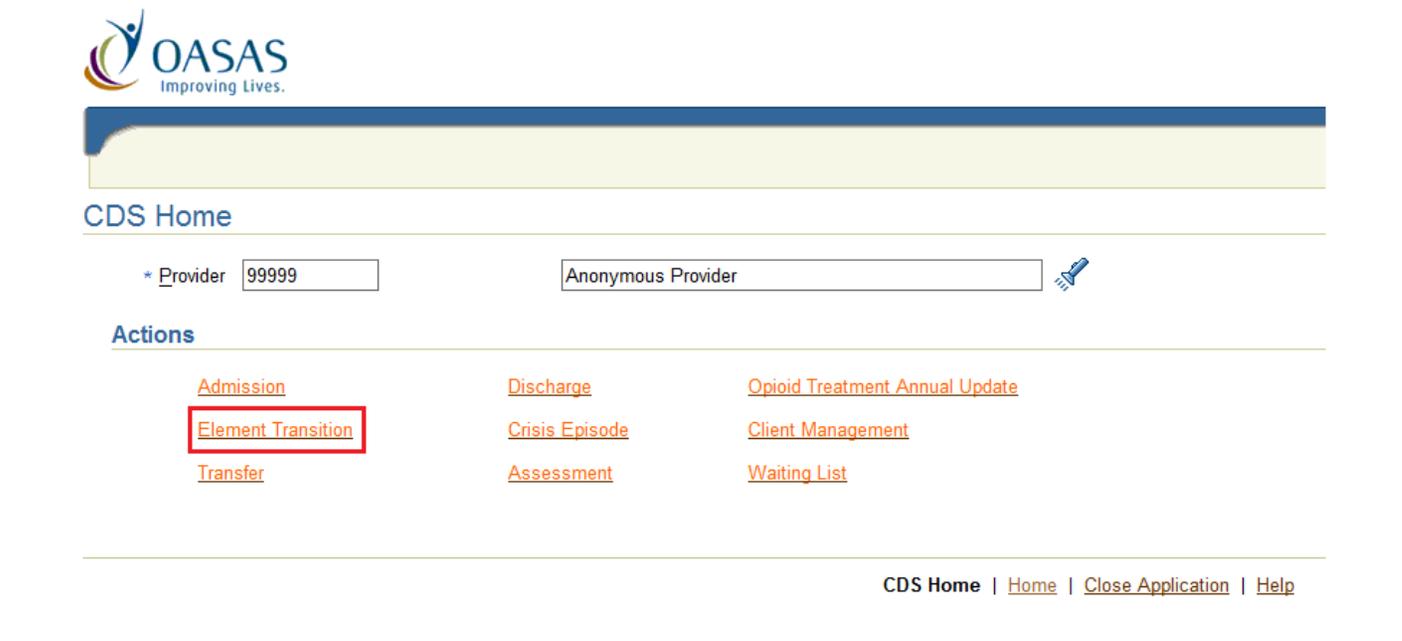
- Open the CDS Application
- Element Transition Search
- Enter the Transition Information
- Fixing Errors

When you are entering an Element Transition for a client, you will have already completed an Admission Form (PAS-44N) 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 the applications Home page, log in and then click Applications.</p> <p>Applications Home Page</p>	 <p>Home Applications</p> <p>For help with OASAS Applications: OASAS staff call (844) 891-1786; other users call (518) 485-2379, fax (518) 473-1316, or email healthhelp@its.ny.gov</p> <p>Application Documentation</p> <ul style="list-style-type: none"> 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 2016 Changing Contact Information Instructions Client Data System Bulletins IPMES/Workscope User's Manual 18th Edition <p>Links</p> <ul style="list-style-type: none"> NY State Links Office of Alcoholism and Substance Abuse Services <p>CDS Documentation</p> <ul style="list-style-type: none"> Forms and Instructions User Guides Online Tutorials <p>CDS Starting 4/1/2017 CDS 10/1/2014 to 3/31/2017 CDS 4/1/2009 to 9/30/2014 CDS 1/1/2007 to 3/31/2009 CDS 6/1/2005 to 12/31/2006 Gamb</p> <p>These Client Data System forms must be used for admissions, discharges, and crisis services with transaction dates on or after April 1, 2017. The Monthly Servi beginning with the April 2017 report that is due by May 10, 2017. Admissions, discharges, and crisis services with transaction dates prior to April 1, 2017 n located in the other tabs in this region regardless of the date they are entered in the system.</p> <p>Consent Forms</p> <ul style="list-style-type: none"> Authorization for Release of Behavioral Health Information (TRS-61, October 2014) FAQ Criminal Justice Consent for Drug Law Reform (TRS-49, October 2009) FAQ <p>Forms and Instructions</p> <ul style="list-style-type: none"> Assessment Form (PAS-61N, April 2017)
1a	<p>Once in the Client Data System home page click the link to Client Data System to reach the actions page.</p>	 <p>Home Applications</p> <p>Client Data System Gambling Provider Directory System Monthly Service Delivery IPMES/Workscope Help</p> <p>Applications and reports open in a separate browser and require a notepad icon. Click the notepad icon next to each report link!</p> <p>Client Data System Application</p> <ul style="list-style-type: none"> Client Data System Client Data System - Inquiry STAR-QI

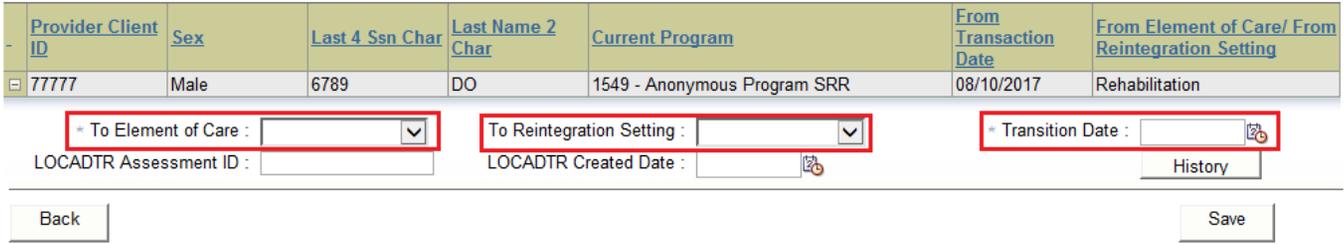
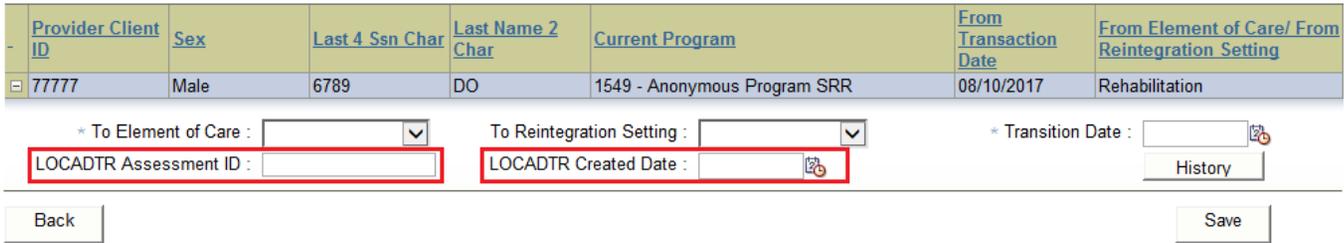
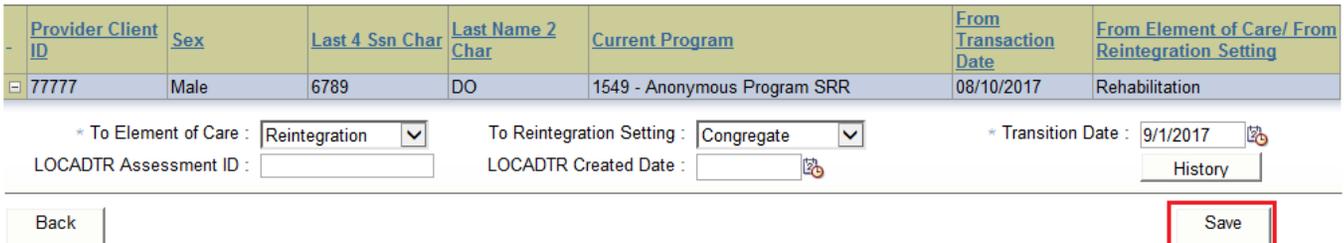
Step	Instructions	Image
2	<p>This is the “CDS Home” page. From here you can choose any of the links shown. This guide will focus on the Element Transition used only for Part 820 residential treatment programs.</p> <p>Select the Element Transition link to proceed with your transaction.</p>	

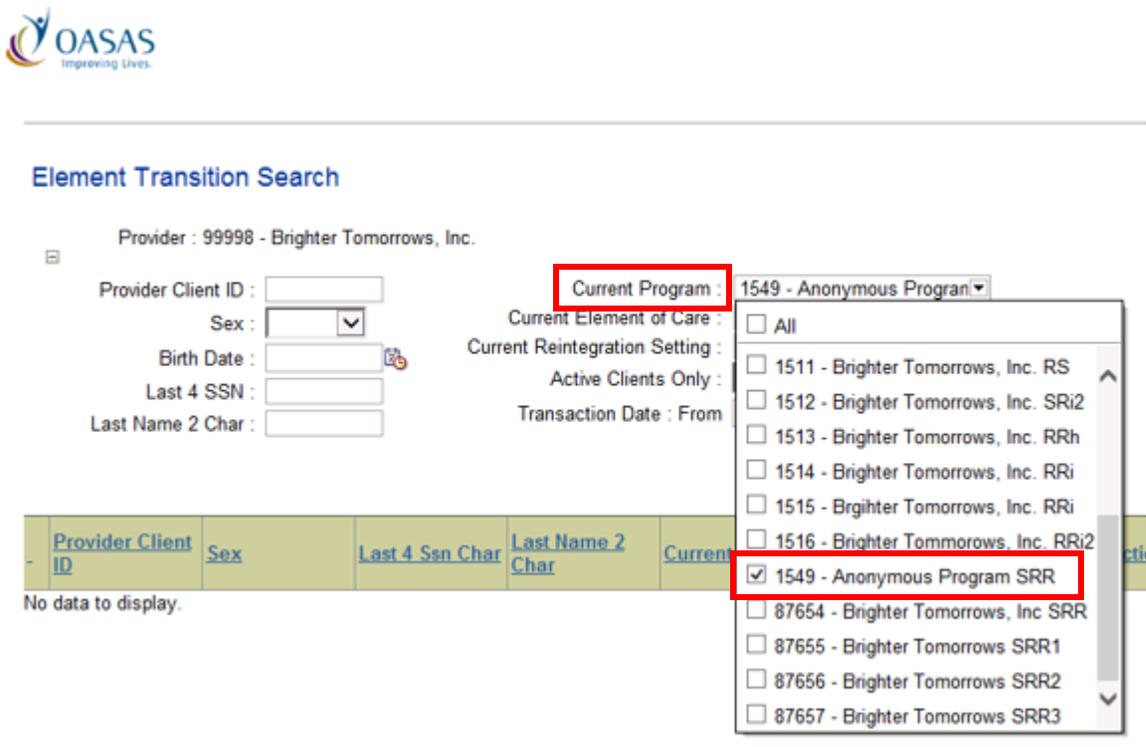
Step	Instructions	Image
<p>3</p>	<p>First you will need to find the client or clients that you would like to transition between elements. There are multiple ways to search seen at the top of the page and the results will display at the bottom.</p> <p>If you have a specific client in mind, simply enter the Provider Client ID in the identified search box and click Find.</p> <p>In addition, items such Sex, Birth Date, Last 4 SSN and Last Name 2 Char can enable you to search for a specific client or clients by entering only that information into one of the identified fields.</p>	<p>The screenshot shows the 'Element Transition Search' interface. At the top, it says 'Provider : 99999 - Anonymous Provider'. Below this are several search criteria: 'Provider Client ID' (highlighted with a red box), 'Sex' (dropdown), 'Birth Date' (text input with a calendar icon), 'Last 4 SSN' (text input), and 'Last Name 2 Char' (text input). To the right, there are more filters: 'Current Program' (dropdown), 'Current Element of Care' (dropdown), 'Current Reintegration Setting' (dropdown), 'Active Clients Only' (dropdown set to 'Yes'), and 'Transaction Date' (range selector with 'From' and 'To' fields). At the bottom right, there are 'Find' and 'Clear' buttons, with 'Find' highlighted by a red box. Below the search form is a table header with columns: 'Provider Client ID', 'Sex', 'Last 4 Ssn Char', 'Last Name 2 Char', 'Current Program', 'From Transaction Date', and 'From Element of Care/ From Reintegration Setting'.</p>

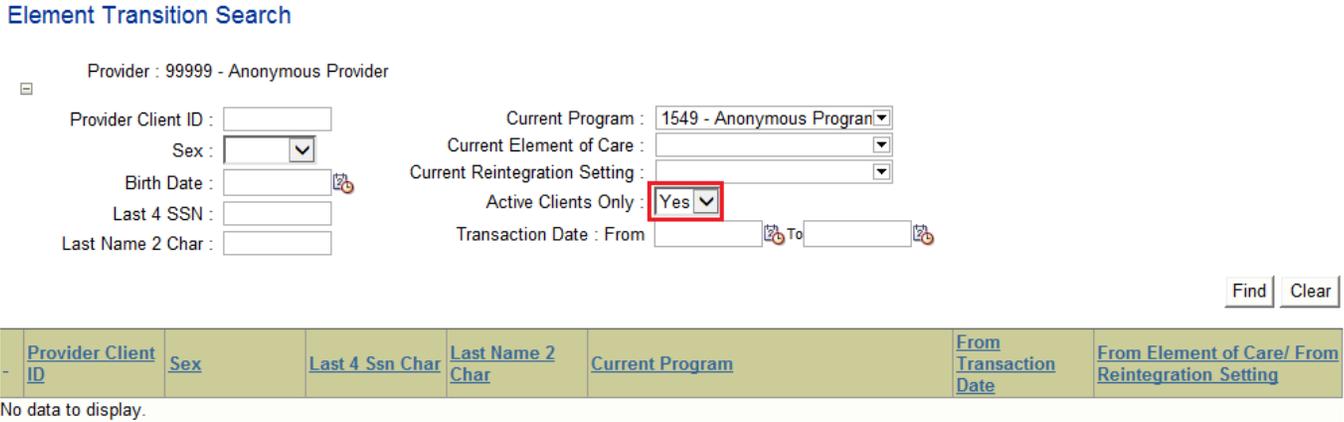
Enter Transition Element Search

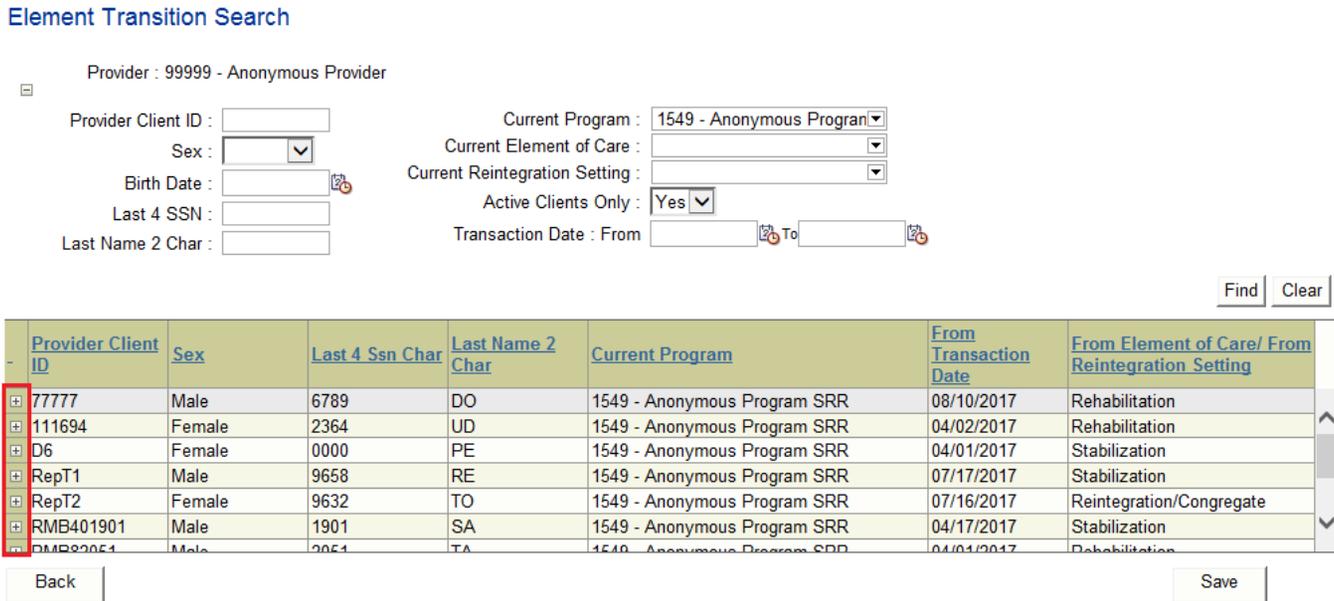
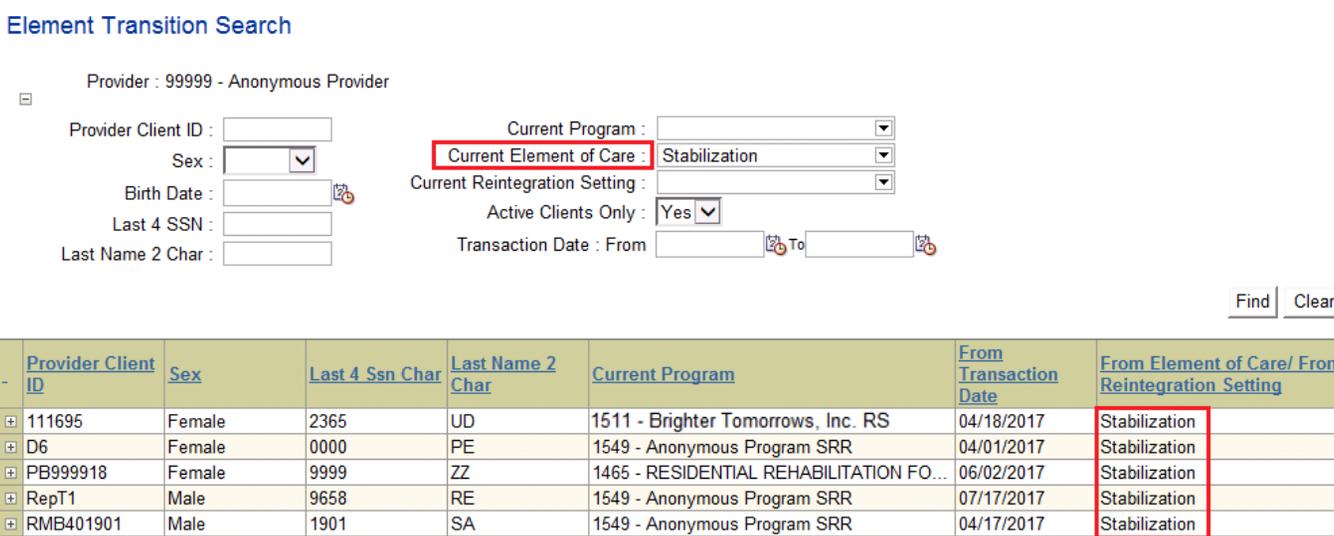
Step	Instructions	Image														
4	<p>When your search result appears, you will then need to click the <i>plus symbol</i> indicated here to expand the transition transaction items.</p> <p>Displayed in the search results is the client's ID information, current rogram, from transaction date and current element of care.</p>	<p>Element Transition Search</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : <input type="text" value="77777"/> Current Program : <input type="text"/></p> <p>Sex : <input type="text" value="Male"/> Current Element of Care : <input type="text"/></p> <p>Birth Date : <input type="text"/> Current Reintegration Setting : <input type="text"/></p> <p>Last 4 SSN : <input type="text"/> Active Clients Only : <input type="text" value="Yes"/></p> <p>Last Name 2 Char : <input type="text"/> Transaction Date : From <input type="text"/> To <input type="text"/></p> <p style="text-align: right;"><input type="button" value="Find"/> <input type="button" value="Clear"/></p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>08/10/2017</td> <td>Rehabilitation</td> </tr> </tbody> </table>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	77777	Male	6789	DO	1549 - Anonymous Program SRR	08/10/2017	Rehabilitation
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Step	Instructions	Image														
<p>5</p>	<p>When the transaction items are open, you can see the data items needed for the transition transaction. Also, notice the History button shown below Transition Date. Click this button to view the previous transactions for this client for this treatment episode.</p> <p>Follow this link for further explanation regarding Part 820 Element Transitions at Element Transition History.</p>	<p>Element Transition Search</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : 77777 Current Program : [Dropdown]</p> <p>Sex : [Dropdown] Current Element of Care : [Dropdown]</p> <p>Birth Date : [Text] Current Reintegration Setting : [Dropdown]</p> <p>Last 4 SSN : [Text] Active Clients Only : Yes [Dropdown]</p> <p>Last Name 2 Char : [Text] Transaction Date : From [Text] To [Text]</p> <p>[Find] [Clear]</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>08/10/2017</td> <td>Rehabilitation</td> </tr> </tbody> </table> <p>* To Element of Care : [Dropdown] To Reintegration Setting : [Dropdown] * Transition Date : [Text]</p> <p>LOCADTR Assessment ID : [Text] LOCADTR Created Date : [Text]</p> <p>History</p>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	77777	Male	6789	DO	1549 - Anonymous Program SRR	08/10/2017	Rehabilitation
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<p>6</p>	<p>This is an example of what the transition history for a client might look like. You can see the admission into Stabilization and then the subsequent transition into Rehabilitation on 8/10/2017.</p> <p>When finished reviewing the transactions click Close or X it out.</p>	<p>Transition History for Client 77777 [Close]</p> <table border="1"> <thead> <tr> <th>Program</th> <th>Date</th> <th>Transaction</th> <th>From/To Element of Care</th> </tr> </thead> <tbody> <tr> <td>1549</td> <td>8/1/2017</td> <td>Admission</td> <td>From: To: Stabilization</td> </tr> <tr> <td>1549</td> <td>8/10/2017</td> <td>Element Transition</td> <td>From: Stabilization To: Rehabilitation</td> </tr> </tbody> </table> <p>Close</p>	Program	Date	Transaction	From/To Element of Care	1549	8/1/2017	Admission	From: To: Stabilization	1549	8/10/2017	Element Transition	From: Stabilization To: Rehabilitation		
Program	Date	Transaction	From/To Element of Care													
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1549	8/10/2017	Element Transition	From: Stabilization To: Rehabilitation													

Step	Instructions	Image
7	<p>Once you have identified the transition you want to complete, use the dropdowns to select To Element of Care and Reintegration Setting, if needed. Then enter a Transition Date. You can enter a date (MM/DD/YYYY) in the box or select a date using the calendar that is shown next to the box.</p>	 <p>The screenshot shows a table with columns: Provider Client ID, Sex, Last 4 Ssn Char, Last Name 2 Char, Current Program, From Transaction Date, and From Element of Care/ From Reintegration Setting. Below the table are fields for: * To Element of Care (dropdown), To Reintegration Setting (dropdown), * Transition Date (calendar icon), LOCADTR Assessment ID, and LOCADTR Created Date (calendar icon). There are 'Back' and 'Save' buttons at the bottom.</p>
8	<p>LOCADTR Information consists of Assessment ID and Created Date 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 - LOCADTR 3.0</p>	 <p>The screenshot is similar to the previous one, but the 'LOCADTR Assessment ID' and 'LOCADTR Created Date' fields are highlighted in red.</p>
9	<p>Once the information is entered, click Save.</p>	 <p>The screenshot shows the form with 'To Element of Care' set to 'Reintegration', 'To Reintegration Setting' set to 'Congregate', and 'Transition Date' set to '9/1/2017'. The 'Save' button at the bottom right is highlighted in red.</p>

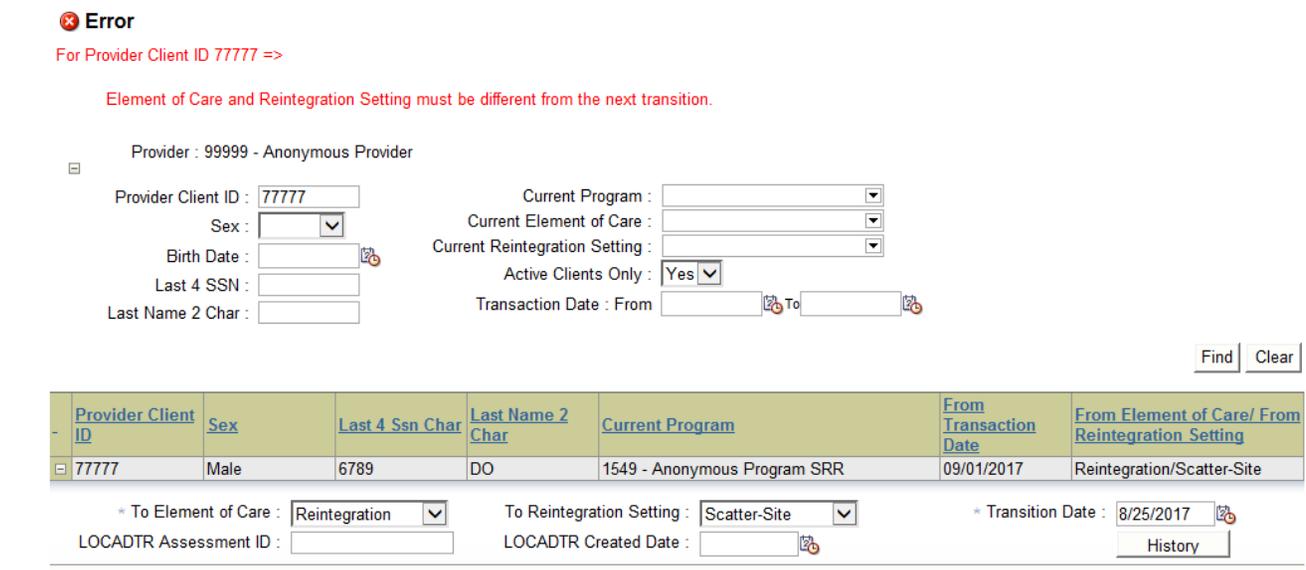
Step	Instructions	Image										
10	<p>Other ways to search for clients include the Current Program dropdown.</p> <p>When a program is selected, this search will display all the active clients in that program and their current element.</p>	 <p>OASAS Improving lives.</p> <hr/> <p>Element Transition Search</p> <p>Provider : 99998 - Brighter Tomorrows, Inc.</p> <p>Provider Client ID : <input type="text"/></p> <p>Sex : <input type="text" value="v"/></p> <p>Birth Date : <input type="text" value="05"/></p> <p>Last 4 SSN : <input type="text"/></p> <p>Last Name 2 Char : <input type="text"/></p> <p>Current Program : 1549 - Anonymous Program</p> <p>Current Element of Care : <input type="checkbox"/> All</p> <p>Current Reintegration Setting : <input type="checkbox"/> 1511 - Brighter Tomorrows, Inc. RS</p> <p>Active Clients Only : <input type="checkbox"/> 1512 - Brighter Tomorrows, Inc. SRRi2</p> <p>Transaction Date : From <input type="text"/> <input type="text"/></p> <p><input type="checkbox"/> 1513 - Brighter Tomorrows, Inc. RRh</p> <p><input type="checkbox"/> 1514 - Brighter Tomorrows, Inc. RRI</p> <p><input type="checkbox"/> 1515 - Brighter Tomorrows, Inc. RRI</p> <p><input type="checkbox"/> 1516 - Brighter Tomorrows, Inc. RRI2</p> <p><input checked="" type="checkbox"/> 1549 - Anonymous Program SRR</p> <p><input type="checkbox"/> 87654 - Brighter Tomorrows, Inc SRR</p> <p><input type="checkbox"/> 87655 - Brighter Tomorrows SRR1</p> <p><input type="checkbox"/> 87656 - Brighter Tomorrows SRR2</p> <p><input type="checkbox"/> 87657 - Brighter Tomorrows SRR3</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current</th> </tr> </thead> <tbody> <tr> <td colspan="5">No data to display.</td> </tr> </tbody> </table>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current	No data to display.				
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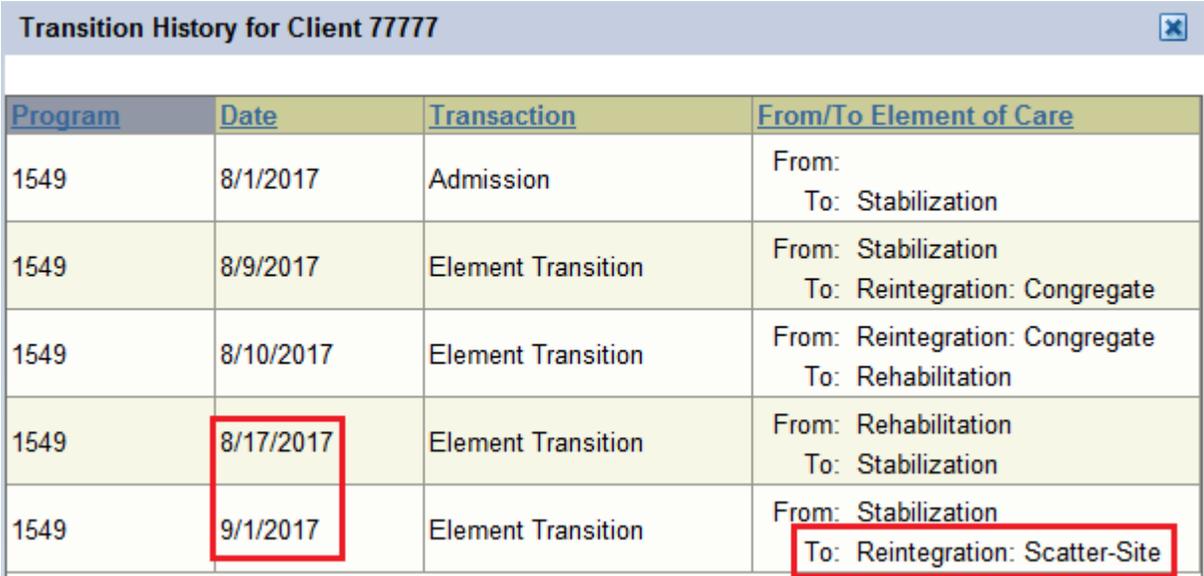
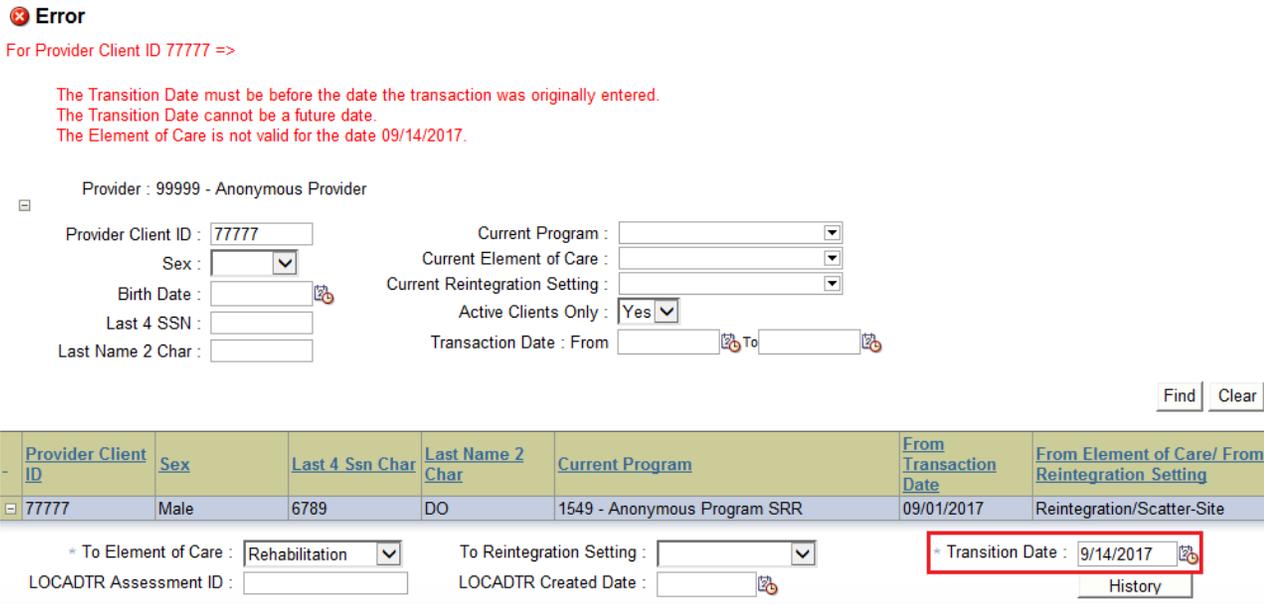
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11	<p>Notice the Active Clients Only dropdown, where you can indicate whether the search will include inactive clients or active only clients.</p>	 <p>Element Transition Search</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : <input type="text"/></p> <p>Sex : <input type="text" value=""/></p> <p>Birth Date : <input type="text"/></p> <p>Last 4 SSN : <input type="text"/></p> <p>Last Name 2 Char : <input type="text"/></p> <p>Current Program : <input type="text" value="1549 - Anonymous Program"/></p> <p>Current Element of Care : <input type="text"/></p> <p>Current Reintegration Setting : <input type="text"/></p> <p>Active Clients Only : <input type="text" value="Yes"/></p> <p>Transaction Date : From <input type="text"/> To <input type="text"/></p> <p><input type="button" value="Find"/> <input type="button" value="Clear"/></p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td colspan="7">No data to display.</td> </tr> </tbody> </table>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	No data to display.						
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<p>12</p>	<p>Using this search option, you can complete transition transactions for one or multiple clients by clicking the Plus (+) symbol to expand the transition transaction information and saving the transition information entered.</p>	 <p>Element Transition Search</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : <input type="text"/></p> <p>Sex : <input type="text" value=""/></p> <p>Birth Date : <input type="text"/></p> <p>Last 4 SSN : <input type="text"/></p> <p>Last Name 2 Char : <input type="text"/></p> <p>Current Program : 1549 - Anonymous Program</p> <p>Current Element of Care : <input type="text" value=""/></p> <p>Current Reintegration Setting : <input type="text" value=""/></p> <p>Active Clients Only : Yes</p> <p>Transaction Date : From <input type="text"/> To <input type="text"/></p> <p><input type="button" value="Find"/> <input type="button" value="Clear"/></p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>+ 77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>08/10/2017</td> <td>Rehabilitation</td> </tr> <tr> <td>+ 111694</td> <td>Female</td> <td>2364</td> <td>UD</td> <td>1549 - Anonymous Program SRR</td> <td>04/02/2017</td> <td>Rehabilitation</td> </tr> <tr> <td>+ D6</td> <td>Female</td> <td>0000</td> <td>PE</td> <td>1549 - Anonymous Program SRR</td> <td>04/01/2017</td> <td>Stabilization</td> </tr> <tr> <td>+ RepT1</td> <td>Male</td> <td>9658</td> <td>RE</td> <td>1549 - Anonymous Program SRR</td> <td>07/17/2017</td> <td>Stabilization</td> </tr> <tr> <td>+ RepT2</td> <td>Female</td> <td>9632</td> <td>TO</td> <td>1549 - Anonymous Program SRR</td> <td>07/16/2017</td> <td>Reintegration/Congregate</td> </tr> <tr> <td>+ RMB401901</td> <td>Male</td> <td>1901</td> <td>SA</td> <td>1549 - Anonymous Program SRR</td> <td>04/17/2017</td> <td>Stabilization</td> </tr> <tr> <td>+ RMB22051</td> <td>Male</td> <td>2051</td> <td>TA</td> <td>1549 - Anonymous Program SRR</td> <td>04/01/2017</td> <td>Rehabilitation</td> </tr> </tbody> </table> <p><input type="button" value="Back"/> <input type="button" value="Save"/></p>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	+ 77777	Male	6789	DO	1549 - Anonymous Program SRR	08/10/2017	Rehabilitation	+ 111694	Female	2364	UD	1549 - Anonymous Program SRR	04/02/2017	Rehabilitation	+ D6	Female	0000	PE	1549 - Anonymous Program SRR	04/01/2017	Stabilization	+ RepT1	Male	9658	RE	1549 - Anonymous Program SRR	07/17/2017	Stabilization	+ RepT2	Female	9632	TO	1549 - Anonymous Program SRR	07/16/2017	Reintegration/Congregate	+ RMB401901	Male	1901	SA	1549 - Anonymous Program SRR	04/17/2017	Stabilization	+ RMB22051	Male	2051	TA	1549 - Anonymous Program SRR	04/01/2017	Rehabilitation
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<p>13</p>	<p>Another method of client search is with the Current Element of Care dropdown.</p> <p>Use the Current Element of Care dropdown by selecting an element and you will see all the clients that are currently in that element of care across all programs within your provider.</p> <p>This can also be done with Current Reintegration Setting.</p>	 <p>Element Transition Search</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : <input type="text"/></p> <p>Sex : <input type="text" value=""/></p> <p>Birth Date : <input type="text"/></p> <p>Last 4 SSN : <input type="text"/></p> <p>Last Name 2 Char : <input type="text"/></p> <p>Current Program : <input type="text" value=""/></p> <p>Current Element of Care : Stabilization</p> <p>Current Reintegration Setting : <input type="text" value=""/></p> <p>Active Clients Only : Yes</p> <p>Transaction Date : From <input type="text"/> To <input type="text"/></p> <p><input type="button" value="Find"/> <input type="button" value="Clear"/></p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>+ 111695</td> <td>Female</td> <td>2365</td> <td>UD</td> <td>1511 - Brighter Tomorrows, Inc. RS</td> <td>04/18/2017</td> <td>Stabilization</td> </tr> <tr> <td>+ D6</td> <td>Female</td> <td>0000</td> <td>PE</td> <td>1549 - Anonymous Program SRR</td> <td>04/01/2017</td> <td>Stabilization</td> </tr> <tr> <td>+ PB999918</td> <td>Female</td> <td>9999</td> <td>ZZ</td> <td>1465 - RESIDENTIAL REHABILITATION FO...</td> <td>06/02/2017</td> <td>Stabilization</td> </tr> <tr> <td>+ RepT1</td> <td>Male</td> <td>9658</td> <td>RE</td> <td>1549 - Anonymous Program SRR</td> <td>07/17/2017</td> <td>Stabilization</td> </tr> <tr> <td>+ RMB401901</td> <td>Male</td> <td>1901</td> <td>SA</td> <td>1549 - Anonymous Program SRR</td> <td>04/17/2017</td> <td>Stabilization</td> </tr> </tbody> </table>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	+ 111695	Female	2365	UD	1511 - Brighter Tomorrows, Inc. RS	04/18/2017	Stabilization	+ D6	Female	0000	PE	1549 - Anonymous Program SRR	04/01/2017	Stabilization	+ PB999918	Female	9999	ZZ	1465 - RESIDENTIAL REHABILITATION FO...	06/02/2017	Stabilization	+ RepT1	Male	9658	RE	1549 - Anonymous Program SRR	07/17/2017	Stabilization	+ RMB401901	Male	1901	SA	1549 - Anonymous Program SRR	04/17/2017	Stabilization														
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+ PB999918	Female	9999	ZZ	1465 - RESIDENTIAL REHABILITATION FO...	06/02/2017	Stabilization																																																				
+ RepT1	Male	9658	RE	1549 - Anonymous Program SRR	07/17/2017	Stabilization																																																				
+ RMB401901	Male	1901	SA	1549 - Anonymous Program SRR	04/17/2017	Stabilization																																																				

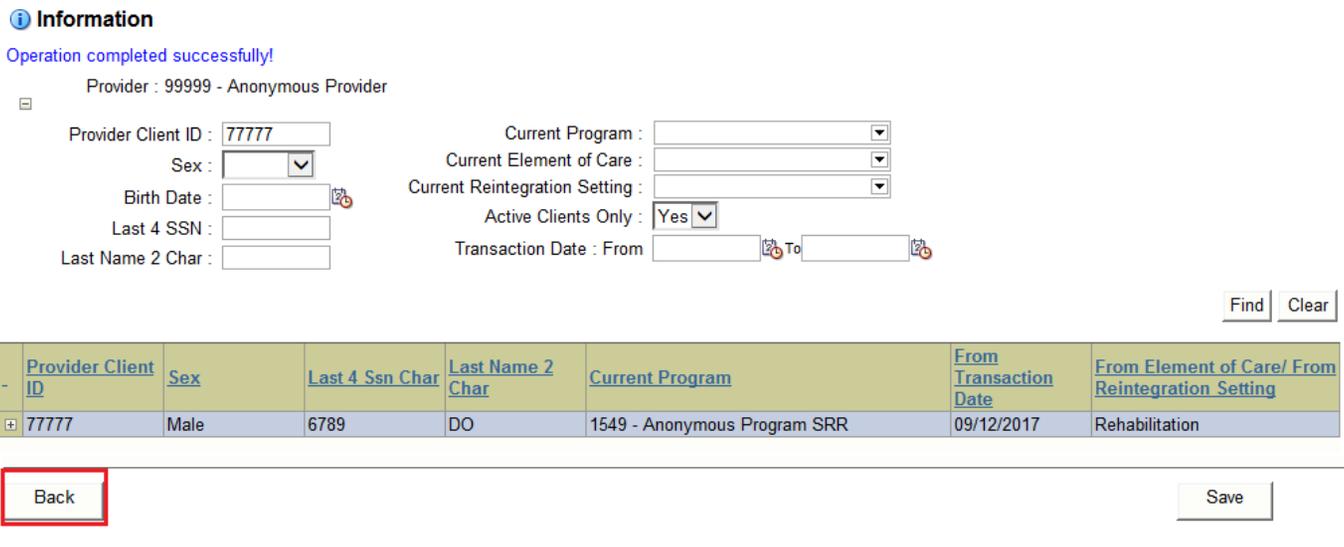
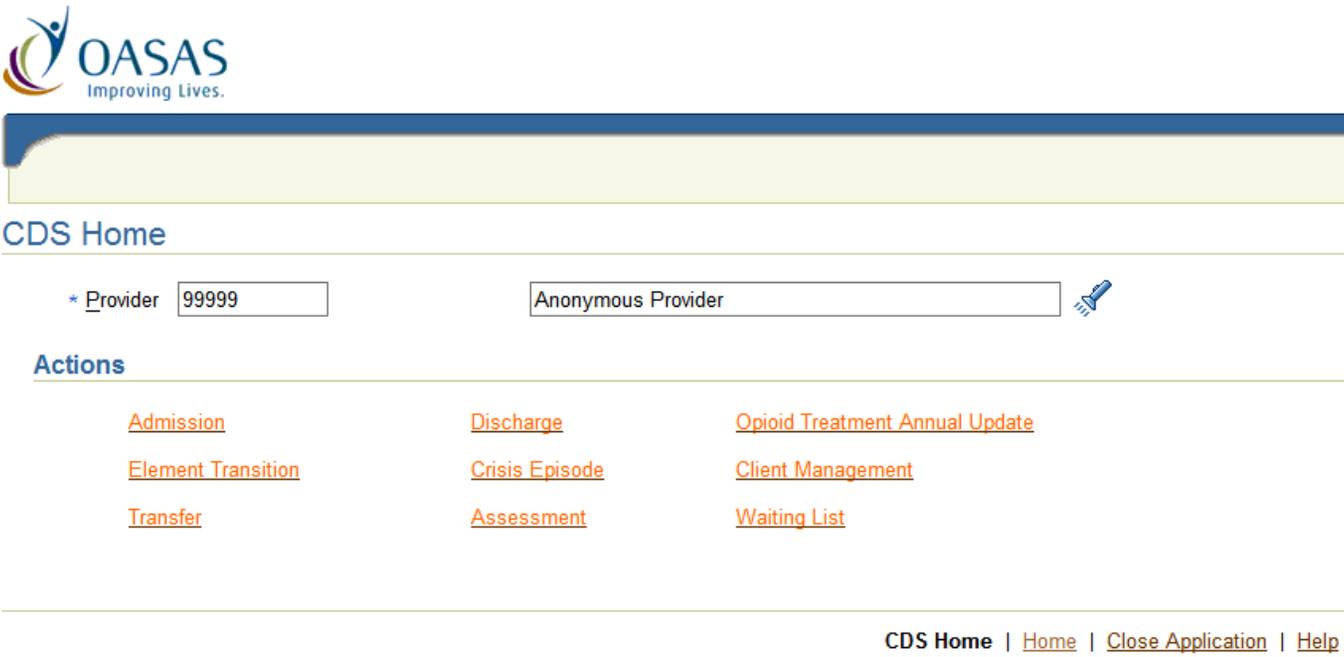
Step	Instructions	Image																					
<p>14</p>	<p>Another way to search for clients is by their From Transaction Date. This result will give you a client's last transaction that occurred between the dates that you specify using the Transaction Date and clicking Find.</p>	<p>Element Transition Search</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : <input type="text"/></p> <p>Sex : <input type="text" value="v"/></p> <p>Birth Date : <input type="text" value="c"/></p> <p>Last 4 SSN : <input type="text"/></p> <p>Last Name 2 Char : <input type="text"/></p> <p>Current Program : <input type="text" value="v"/></p> <p>Current Element of Care : <input type="text" value="v"/></p> <p>Current Reintegration Setting : <input type="text" value="v"/></p> <p>Active Clients Only : <input type="text" value="v"/></p> <p>Transaction Date : From <input type="text" value="08/01/2017"/> To <input type="text" value="08/31/2017"/></p> <p><input type="button" value="Find"/> <input type="button" value="Clear"/></p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>08/10/2017</td> <td>Rehabilitation</td> </tr> </tbody> </table>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	77777	Male	6789	DO	1549 - Anonymous Program SRR	08/10/2017	Rehabilitation							
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77777	Male	6789	DO	1549 - Anonymous Program SRR	08/10/2017	Rehabilitation																	
<p>15</p>	<p>To complete a transition all that is required is the Element of Care and Reintegration Setting if needed, along with the Transition Date, then click Save.</p> <p>Multiple transitions can be performed with one Save.</p>	<p>Provider Client ID : <input type="text" value="77777"/></p> <p>Sex : <input type="text" value="Male"/></p> <p>Last 4 Ssn Char : <input type="text" value="6789"/></p> <p>Last Name 2 Char : <input type="text" value="DO"/></p> <p>Current Program : <input type="text" value="1549 - Anonymous Program SRR"/></p> <p>From Transaction Date : <input type="text" value="08/10/2017"/></p> <p>From Element of Care/ From Reintegration Setting : <input type="text" value="Rehabilitation"/></p> <p>* To Element of Care : <input type="text" value="Reintegration"/></p> <p>To Reintegration Setting : <input type="text" value="Scatter-Site"/></p> <p>* Transition Date : <input type="text" value="9/1/2017"/></p> <p>LOCADTR Assessment ID : <input type="text"/></p> <p>LOCADTR Created Date : <input type="text"/></p> <p><input type="button" value="History"/></p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>08/10/2017</td> <td>Rehabilitation</td> </tr> <tr> <td>NR33</td> <td>Male</td> <td>1234</td> <td>NI</td> <td>1548 - 6089 Test</td> <td>08/01/2017</td> <td>Stabilization</td> </tr> </tbody> </table> <p>* To Element of Care : <input type="text" value="Rehabilitation"/></p> <p>To Reintegration Setting : <input type="text" value="v"/></p> <p>* Transition Date : <input type="text" value="9/4/2017"/></p> <p>LOCADTR Assessment ID : <input type="text"/></p> <p>LOCADTR Created Date : <input type="text"/></p> <p><input type="button" value="History"/></p> <p><input type="button" value="Back"/> <input type="button" value="Save"/></p>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	77777	Male	6789	DO	1549 - Anonymous Program SRR	08/10/2017	Rehabilitation	NR33	Male	1234	NI	1548 - 6089 Test	08/01/2017	Stabilization
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Step	Instructions	Image														
<p>16</p>	<p>An error message will appear if you attempt to transition a client into an Element or Reintegration Setting that they are currently in.</p>	<p>Error For Provider Client ID 77777 =></p> <p>Element of Care and Reintegration Setting must be different from the previous transition.</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : 77777 Current Program : [Dropdown]</p> <p>Sex : [Male] Current Element of Care : [Dropdown]</p> <p>Birth Date : [Date] Current Reintegration Setting : [Dropdown]</p> <p>Last 4 SSN : [Text] Active Clients Only : Yes [Dropdown]</p> <p>Last Name 2 Char : [Text] Transaction Date : From [Date] To [Date]</p> <p>[Find] [Clear]</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>09/01/2017</td> <td>Reintegration/Scatter-Site</td> </tr> </tbody> </table> <p>* To Element of Care : [Reintegration] To Reintegration Setting : [Scatter-Site] * Transition Date : 9/12/2017</p> <p>LOCADTR Assessment ID : [Text] LOCADTR Created Date : [Date] [History]</p>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	77777	Male	6789	DO	1549 - Anonymous Program SRR	09/01/2017	Reintegration/Scatter-Site
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<p>16a</p>	<p>This is an example of the same error message, but this time it identifies a transition date that conflicts with previously entered transition dates.</p> <p>The message states that the attempt to enter a transition to Stabilization with the date of 8/20/17 is the same as the <i>previous</i> transition.</p>	<p>Error For Provider Client ID 77777 =></p> <p>Element of Care and Reintegration Setting must be different from the previous transition.</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : 77777 Current Program : [Dropdown]</p> <p>Sex : [Male] Current Element of Care : [Dropdown]</p> <p>Birth Date : [Date] Current Reintegration Setting : [Dropdown]</p> <p>Last 4 SSN : [Text] Active Clients Only : Yes [Dropdown]</p> <p>Last Name 2 Char : [Text] Transaction Date : From [Date] To [Date]</p> <p>[Find] [Clear]</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>09/01/2017</td> <td>Reintegration/Scatter-Site</td> </tr> </tbody> </table> <p>* To Element of Care : [Stabilization] To Reintegration Setting : [Dropdown] * Transition Date : 8/20/2017</p> <p>LOCADTR Assessment ID : [Text] LOCADTR Created Date : [Date] [History]</p>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	77777	Male	6789	DO	1549 - Anonymous Program SRR	09/01/2017	Reintegration/Scatter-Site
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Step	Instructions	Image																								
17	<p>Using the History button, as indicated in Step 5, it will show that putting a transition into stabilization on 8/20/17 would be redundant since the client was already in that element as of that date.</p>	 <p>Transition History for Client 77777</p> <table border="1"> <thead> <tr> <th>Program</th> <th>Date</th> <th>Transaction</th> <th>From/To Element of Care</th> </tr> </thead> <tbody> <tr> <td>1549</td> <td>8/1/2017</td> <td>Admission</td> <td>From: To: Stabilization</td> </tr> <tr> <td>1549</td> <td>8/9/2017</td> <td>Element Transition</td> <td>From: Stabilization To: Reintegration: Congregate</td> </tr> <tr> <td>1549</td> <td>8/10/2017</td> <td>Element Transition</td> <td>From: Reintegration: Congregate To: Rehabilitation</td> </tr> <tr> <td>1549</td> <td>8/17/2017</td> <td>Element Transition</td> <td>From: Rehabilitation To: Stabilization</td> </tr> <tr> <td>1549</td> <td>9/1/2017</td> <td>Element Transition</td> <td>From: Stabilization To: Reintegration: Scatter-Site</td> </tr> </tbody> </table>	Program	Date	Transaction	From/To Element of Care	1549	8/1/2017	Admission	From: To: Stabilization	1549	8/9/2017	Element Transition	From: Stabilization To: Reintegration: Congregate	1549	8/10/2017	Element Transition	From: Reintegration: Congregate To: Rehabilitation	1549	8/17/2017	Element Transition	From: Rehabilitation To: Stabilization	1549	9/1/2017	Element Transition	From: Stabilization To: Reintegration: Scatter-Site
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18	<p>This is another example of an error message you might receive regarding entering a transition date that conflicts with previously entered transition dates.</p> <p>This message states that the attempt to enter a transition to Reintegration Scatter-Site with the date of 8/25/17 is the same element as the <i>next</i> transition.</p>	 <p>Error For Provider Client ID 77777 =></p> <p>Element of Care and Reintegration Setting must be different from the next transition.</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : 77777 Sex : <input type="checkbox"/> Male <input checked="" type="checkbox"/> Female Birth Date : <input type="text"/> Last 4 SSN : <input type="text"/> Last Name 2 Char : <input type="text"/></p> <p>Current Program : <input type="text"/> Current Element of Care : <input type="text"/> Current Reintegration Setting : <input type="text"/> Active Clients Only : <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Transaction Date : From <input type="text"/> To <input type="text"/></p> <p>Find Clear</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>09/01/2017</td> <td>Reintegration/Scatter-Site</td> </tr> </tbody> </table> <p>* To Element of Care : <input type="text"/> Reintegration <input type="text"/> * Transition Date : 8/25/2017 LOCADTR Assessment ID : <input type="text"/> LOCADTR Created Date : <input type="text"/> History</p>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	77777	Male	6789	DO	1549 - Anonymous Program SRR	09/01/2017	Reintegration/Scatter-Site										
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<p>19</p>	<p>Using the History button, it will show that putting a transition into Reintegration Scatter-Site on 8/25/17 would be redundant since the client was already in that element as of that date.</p> <p>To avoid these errors, review the Client History. Some transactions may need to be updated or deleted in <i>Client Management</i> to fully correct the <i>Client Transition History</i>.</p>	 <p>Transition History for Client 77777</p> <table border="1"> <thead> <tr> <th>Program</th> <th>Date</th> <th>Transaction</th> <th>From/To Element of Care</th> </tr> </thead> <tbody> <tr> <td>1549</td> <td>8/1/2017</td> <td>Admission</td> <td>From: To: Stabilization</td> </tr> <tr> <td>1549</td> <td>8/9/2017</td> <td>Element Transition</td> <td>From: Stabilization To: Reintegration: Congregate</td> </tr> <tr> <td>1549</td> <td>8/10/2017</td> <td>Element Transition</td> <td>From: Reintegration: Congregate To: Rehabilitation</td> </tr> <tr> <td>1549</td> <td>8/17/2017</td> <td>Element Transition</td> <td>From: Rehabilitation To: Stabilization</td> </tr> <tr> <td>1549</td> <td>9/1/2017</td> <td>Element Transition</td> <td>From: Stabilization To: Reintegration: Scatter-Site</td> </tr> </tbody> </table>	Program	Date	Transaction	From/To Element of Care	1549	8/1/2017	Admission	From: To: Stabilization	1549	8/9/2017	Element Transition	From: Stabilization To: Reintegration: Congregate	1549	8/10/2017	Element Transition	From: Reintegration: Congregate To: Rehabilitation	1549	8/17/2017	Element Transition	From: Rehabilitation To: Stabilization	1549	9/1/2017	Element Transition	From: Stabilization To: Reintegration: Scatter-Site
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1549	9/1/2017	Element Transition	From: Stabilization To: Reintegration: Scatter-Site																							
<p>20</p>	<p>This error message relates to a future Transition Date being entered for the client. All Transition Dates must be on or before the present day you are entering a transition.</p> <p>In this example the present day is 9/12/17.</p> <p>To correct this error simply enter a date on or before today for the Transition Date.</p>	 <p>Error For Provider Client ID 77777 =></p> <p>The Transition Date must be before the date the transaction was originally entered. The Transition Date cannot be a future date. The Element of Care is not valid for the date 09/14/2017.</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : 77777 Sex : <input type="text"/> Birth Date : <input type="text"/> Last 4 SSN : <input type="text"/> Last Name 2 Char : <input type="text"/></p> <p>Current Program : <input type="text"/> Current Element of Care : <input type="text"/> Current Reintegration Setting : <input type="text"/> Active Clients Only : Yes <input type="text"/> Transaction Date : From <input type="text"/> To <input type="text"/></p> <p>Find Clear</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>09/01/2017</td> <td>Reintegration/Scatter-Site</td> </tr> </tbody> </table> <p>* To Element of Care : Rehabilitation <input type="text"/> To Reintegration Setting : <input type="text"/> * Transition Date : 9/14/2017 <input type="text"/> LOCADTR Assessment ID : <input type="text"/> LOCADTR Created Date : <input type="text"/> History</p>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	77777	Male	6789	DO	1549 - Anonymous Program SRR	09/01/2017	Reintegration/Scatter-Site										
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Step	Instructions	Image														
21	<p>This same rule also applies to the LOCADTR Created Date.</p> <p>To correct the error, enter a LOCADTR Created Date on or before today's date, in this case present day is 9/12/14.</p>	<p>Error For Provider Client ID 77777 =></p> <p>The LOCADTR Created Date cannot be a future date.</p> <p>Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : 77777 Sex : Birth Date : Last 4 SSN : Last Name 2 Char : Current Program : Current Element of Care : Current Reintegration Setting : Active Clients Only : Yes Transaction Date : From To</p> <p>Find Clear</p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>09/01/2017</td> <td>Reintegration/Scatter-Site</td> </tr> </tbody> </table> <p>* To Element of Care : Rehabilitation * To Reintegration Setting : * Transition Date : 9/12/2017 LOCADTR Assessment ID : LOCADTR Created Date : 9/14/2017 History</p>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	77777	Male	6789	DO	1549 - Anonymous Program SRR	09/01/2017	Reintegration/Scatter-Site
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21a	<p>Another error message will prompt you to fill in the LOCADTR Assessment ID in its proper numeric form with a possible decimal point.</p>	<p>Error: LOCADTR Assessment ID :: '00000PPP' must be a signed decimal number. LOCADTR Assessment ID :: '00000PPP' must be a signed decimal number consisting of zero or more digits, that may be followed by a decimal point and fraction. Example: 198.23</p> <p>Provider Client ID : 77777 Sex : Male Birth Date : Last 4 SSN : 6789 Last Name 2 Char : DO Current Program : Current Element of Care : Current Reintegration Setting : Active Clients Only : Transaction Date : From To</p> <p>From Transaction Date: 09/01/2017 From Element of Care/ From Reintegration Setting: Reintegration/Scatter-Site</p> <p>* To Element of Care : Rehabilitation * Transition Date : 9/12/2017 LOCADTR Assessment ID : 00000PPP LOCADTR Created Date : 9/12/2017 History</p>														

Step	Instructions	Image														
22	<p>When the transition transaction has been correctly inputted you will receive the message <i>“Operation Completed Successfully!”</i> message in blue.</p> <p>Click the Back button to return to the CDS Actions page.</p>	 <p>Information Operation completed successfully! Provider : 99999 - Anonymous Provider</p> <p>Provider Client ID : <input type="text" value="77777"/> Current Program : <input type="text" value=""/> Sex : <input type="text" value="M"/> Current Element of Care : <input type="text" value=""/> Birth Date : <input type="text" value=""/> Current Reintegration Setting : <input type="text" value=""/> Last 4 SSN : <input type="text" value=""/> Active Clients Only : <input type="text" value="Yes"/> Last Name 2 Char : <input type="text" value=""/> Transaction Date : From <input type="text" value=""/> To <input type="text" value=""/></p> <p style="text-align: right;"><input type="button" value="Find"/> <input type="button" value="Clear"/></p> <table border="1"> <thead> <tr> <th>Provider Client ID</th> <th>Sex</th> <th>Last 4 Ssn Char</th> <th>Last Name 2 Char</th> <th>Current Program</th> <th>From Transaction Date</th> <th>From Element of Care/ From Reintegration Setting</th> </tr> </thead> <tbody> <tr> <td>77777</td> <td>Male</td> <td>6789</td> <td>DO</td> <td>1549 - Anonymous Program SRR</td> <td>09/12/2017</td> <td>Rehabilitation</td> </tr> </tbody> </table> <p><input type="button" value="Back"/> <input type="button" value="Save"/></p>	Provider Client ID	Sex	Last 4 Ssn Char	Last Name 2 Char	Current Program	From Transaction Date	From Element of Care/ From Reintegration Setting	77777	Male	6789	DO	1549 - Anonymous Program SRR	09/12/2017	Rehabilitation
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23	<p>From here you can begin a new transaction or update old transactions by selecting the appropriate link.</p>	 <p></p> <p>CDS Home</p> <p>* Provider <input type="text" value="99999"/> <input type="text" value="Anonymous Provider"/> </p> <p>Actions</p> <p style="text-align: center;"> Admission Discharge Opioid Treatment Annual Update Element Transition Crisis Episode Client Management Transfer Assessment Waiting List </p> <p style="text-align: right;">CDS Home Home Close Application Help</p>														