

Update an Existing Transaction (and Enter Children into Client Record) User Guide

Summary

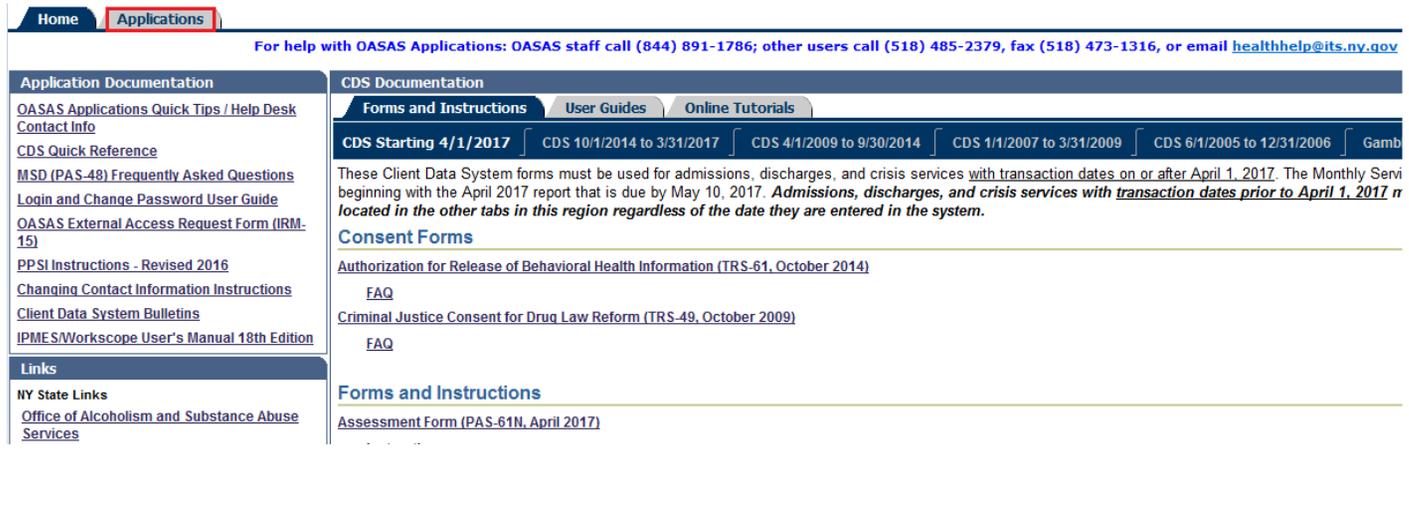
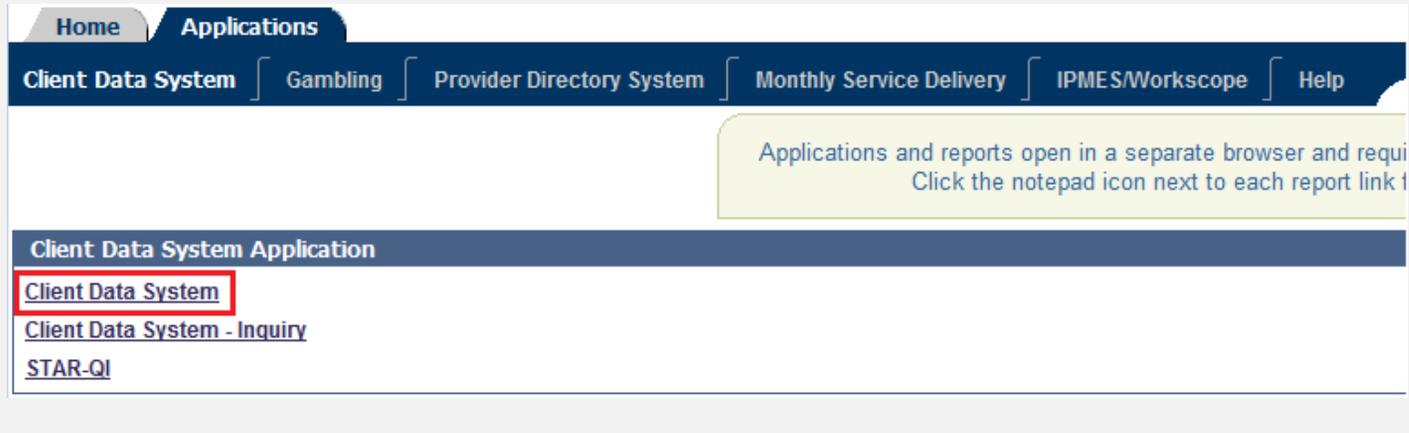
NOTE: Due to the dynamics of state government and the changing needs for the OASAS CDS (Client Data System), some items in this User Guide might have been removed from the live CDS. Similarly, some new information may appear in the live system that is not reflected in this User Guide. To find the most 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 you how to update an existing transaction (i.e., Admission) and then how to add a Child in Residence. A Child in Residence is a child who is in residence along with one or both parents who are in a residential treatment program.

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 Home page, located at <https://apps.oasas.ny.gov>.

Update an Existing Transaction (and Enter Children into Client Record)

Open the CDS Application

Step	Instructions	Image
1	<p>After you log into the OASAS Applications, you will be taken to the <i>OASAS Applications</i> page.</p> <p>To access OASAS Applications, you will click the Applications tab.</p> <p>Click the link below to reach our applications Home page and then click Applications. Apps Home Page</p>	 <p>The screenshot shows the OASAS Applications page. At the top, there is a navigation bar with 'Home' and 'Applications' tabs. The 'Applications' tab is highlighted. Below the navigation bar, there is a header with contact information: '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'. The main content area is divided into several sections: 'Application Documentation' (with links for 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, and IPMES/Workscope User's Manual 18th Edition), 'Links' (with a link for NY State Links Office of Alcoholism and Substance Abuse Services), 'CDS Documentation' (with tabs for Forms and Instructions, User Guides, and Online Tutorials), 'Forms and Instructions' (with a dropdown menu for CDS Starting 4/1/2017, 10/1/2014 to 3/31/2017, 4/1/2009 to 9/30/2014, 1/1/2007 to 3/31/2009, 6/1/2005 to 12/31/2006, and Gambling), 'Consent Forms' (with links for Authorization for Release of Behavioral Health Information (TRS-61, October 2014), Criminal Justice Consent for Drug Law Reform (TRS-49, October 2009), and Assessment Form (PAS-61N, April 2017)), and 'Forms and Instructions' (with a link for Assessment Form (PAS-61N, April 2017)).</p>
2	<p>Once in the Client Data System home page click the link to Client Data System to reach the actions page.</p>	 <p>The screenshot shows the Client Data System Application page. At the top, there is a navigation bar with 'Home' and 'Applications' tabs. The 'Applications' tab is highlighted. Below the navigation bar, there is a header with a navigation bar containing links for 'Client Data System', 'Gambling', 'Provider Directory System', 'Monthly Service Delivery', 'IPMES/Workscope', and 'Help'. The main content area contains a section titled 'Client Data System Application' with a red box highlighting the 'Client Data System' link. Below this link are other links: 'Client Data System - Inquiry' and 'STAR-QI'. A yellow callout box on the right side of the page contains the text: 'Applications and reports open in a separate browser and require a notepad icon. Click the notepad icon next to each report link to open the application in a separate browser window.'</p>

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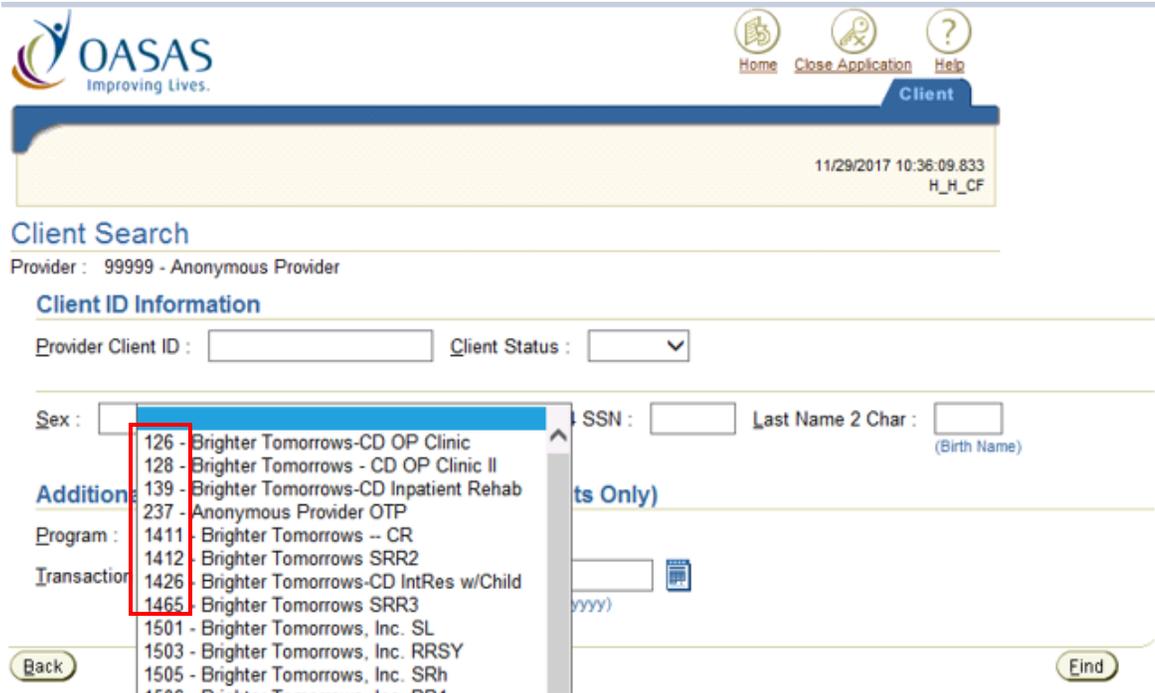
Step	Instructions	Image
3	This is the “CDS Home” page. From here you can choose any of the links shown.	
4	To begin updating an existing transaction from the “CDS Home” page, click the Client Management link to open the “Client Search” page.	

Update an Existing Transaction (and Enter Children into Client Record)

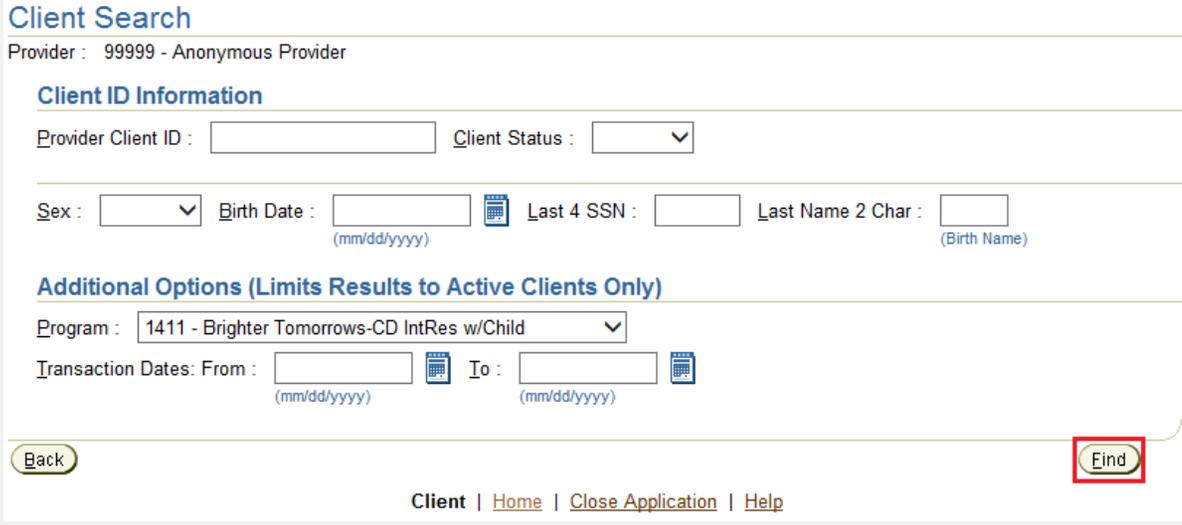
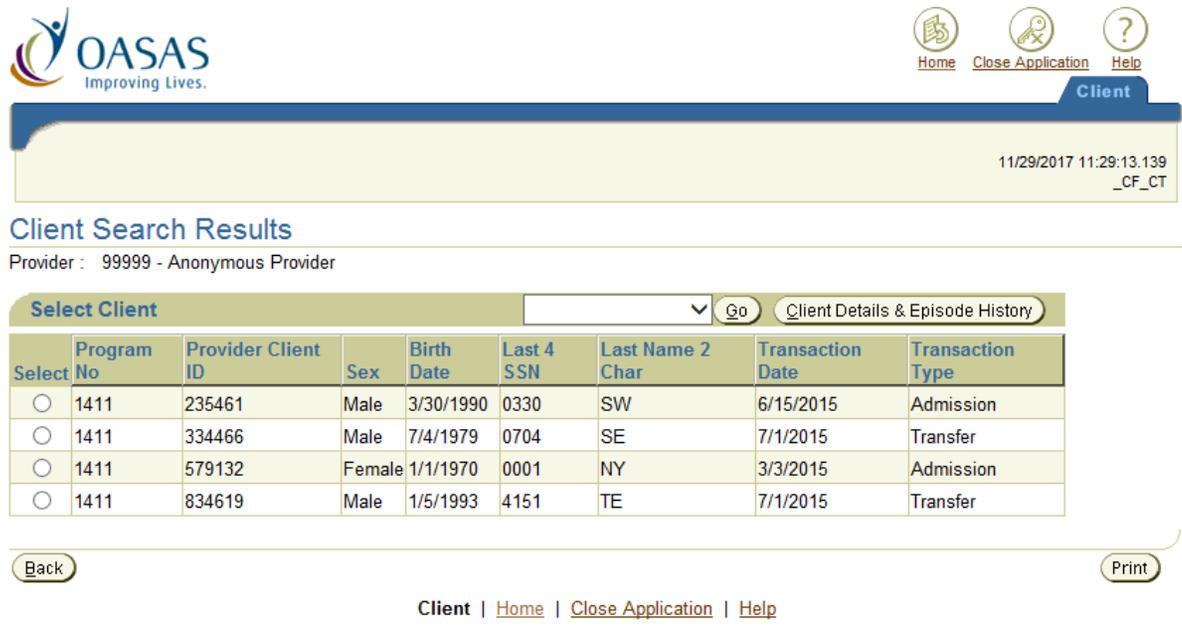
Step	Instructions	Image
5	<p>This is the “<i>Client Search</i>” page, where you can add various search criteria to search for clients. Use this page to produce one client record or a list of clients meeting the selected criteria.</p> <p>If you want a list of all clients for the provider (past and present), leave all search criteria blank.</p> <p>For more information on searching for clients, please review the Tutorial or User Guide titled “Enter Transactions from Client Management and Change Provider ID or Tracking ID” on the OASAS Applications Home page, located at Applications Home Page.</p>	<p>The screenshot displays the OASAS Client Search interface. At the top left is the OASAS logo with the tagline 'Improving Lives.'. To the right are icons for Home, Close Application, and Help. A blue 'Client' tab is positioned above a yellow header bar containing the date and time '11/29/2017 10:36:09.833' and the user ID 'H_H_CF'. The main heading is 'Client Search' followed by 'Provider : 99999 - Anonymous Provider'. The 'Client ID Information' section contains a text input for 'Provider Client ID', a dropdown for 'Client Status', a dropdown for 'Sex', a date input for 'Birth Date' (format mm/dd/yyyy), a text input for 'Last 4 SSN', and a text input for 'Last Name 2 Char' (format Birth Name). The 'Additional Options (Limits Results to Active Clients Only)' section features a dropdown for 'Program', two date inputs for 'Transaction Dates: From' and 'To' (format mm/dd/yyyy), and 'Back' and 'Find' buttons. A footer at the bottom contains the navigation links 'Client Home Close Application Help'.</p>

Enter Program and Client ID Information

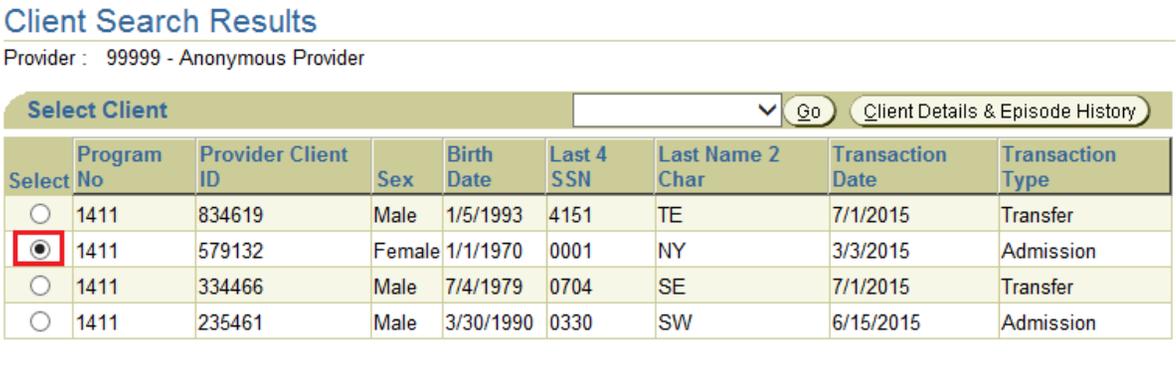
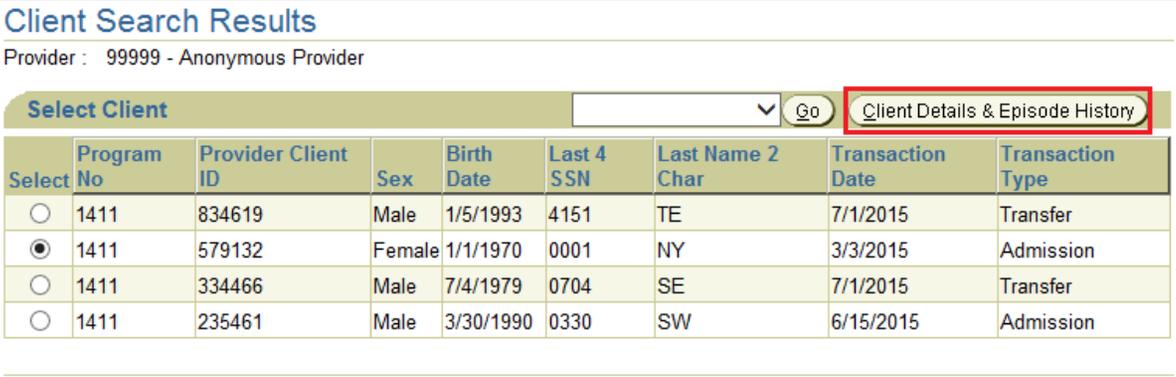
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6	<p>Use the Program dropdown list under the Additional Options (Limits Results to Active Clients Only) heading to select the program.</p> <p>NOTE: By using any of the fields in the Additional Options section (e.g., selecting a specific program), the Client Status field defaults to Active clients only.</p>	

Step	Instructions	Image
7	<p>In this User Guide, we will show how to update an existing Admission transaction (e.g., change the Admission Date) and, later, how to add a Child in Residence for a client being treated in the program “1411– Brighter Tomorrows CD IntRes w/ Child.”</p> <p>You can use either the keyboard or the mouse to select the Program.</p> <p>To use the keyboard, you can either press the down arrow key to scroll through each option one at a time or type the number that begins the item in the dropdown menu. In the latter case, you would type “1” to go to “1411- Brighter Tomorrows-CD OP Clinic.” To continue down the list to “1412 – SUPPORTIVE LIVING,” you would need to type “1” an additional time, as this would scroll through all the items that start with “1.” This is not shown in this User Guide.</p> <p>To use the mouse, click the down arrow for the Program field to open the dropdown list.</p>	

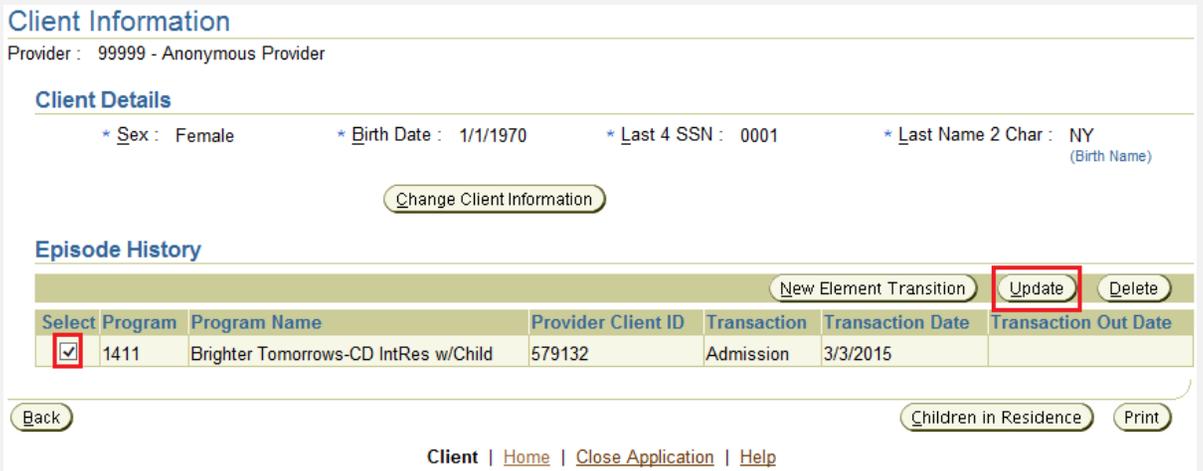
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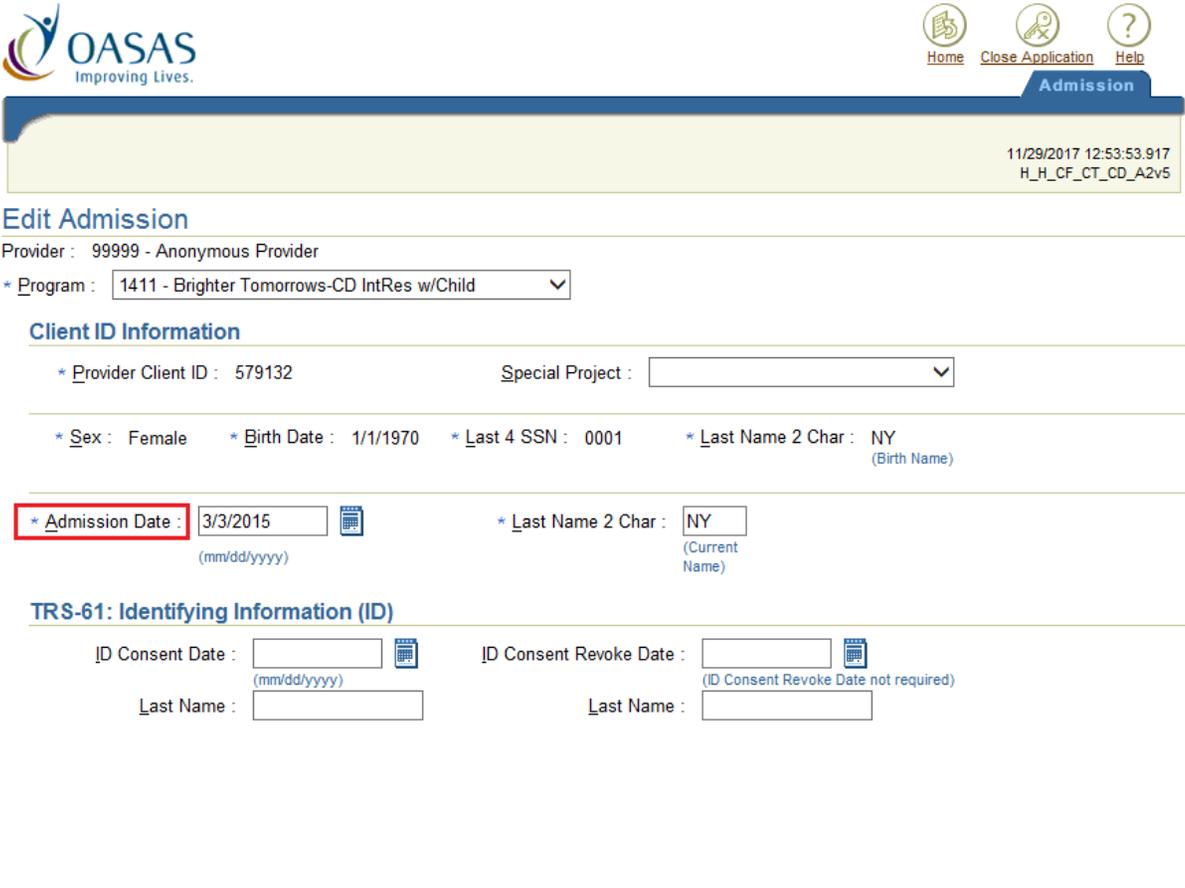
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<p>8</p>	<p>Then select the appropriate program from the Program dropdown list.</p> <p>In this example, the program “1411 – Brighter Tomorrows CD IntRes w/ Child” is selected.</p> <p>Click the Find button to view a list of active clients at the selected program.</p>	 <p>Client Search Provider : 99999 - Anonymous Provider</p> <p>Client ID Information</p> <p>Provider Client ID : <input type="text"/> Client Status : <input type="text"/></p> <p>Sex : <input type="text"/> Birth Date : <input type="text"/> Last 4 SSN : <input type="text"/> Last Name 2 Char : <input type="text"/> <small>(mm/dd/yyyy) (Birth Name)</small></p> <p>Additional Options (Limits Results to Active Clients Only)</p> <p>Program : <input type="text" value="1411 - Brighter Tomorrows-CD IntRes w/Child"/></p> <p>Transaction Dates: From : <input type="text"/> To : <input type="text"/> <small>(mm/dd/yyyy) (mm/dd/yyyy)</small></p> <p>Back Find</p> <p>Client Home Close Application Help</p>																																													
<p>9</p>	<p>This is the “<i>Client Search Results</i>” page. If you have a long list of clients, you could either revise the search criteria to limit the list or sort the list results according to selected criteria.</p>	 <p>OASAS Improving Lives.</p> <p>Home Close Application Help</p> <p>Client</p> <p>11/29/2017 11:29:13.139 _CF_CT</p> <p>Client Search Results Provider : 99999 - Anonymous Provider</p> <p>Select Client <input type="text"/> Go Client Details & Episode History</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>1411</td> <td>235461</td> <td>Male</td> <td>3/30/1990</td> <td>0330</td> <td>SW</td> <td>6/15/2015</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>334466</td> <td>Male</td> <td>7/4/1979</td> <td>0704</td> <td>SE</td> <td>7/1/2015</td> <td>Transfer</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>579132</td> <td>Female</td> <td>1/1/1970</td> <td>0001</td> <td>NY</td> <td>3/3/2015</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>834619</td> <td>Male</td> <td>1/5/1993</td> <td>4151</td> <td>TE</td> <td>7/1/2015</td> <td>Transfer</td> </tr> </tbody> </table> <p>Back Print</p> <p>Client Home Close Application Help</p>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	1411	235461	Male	3/30/1990	0330	SW	6/15/2015	Admission	<input type="radio"/>	1411	334466	Male	7/4/1979	0704	SE	7/1/2015	Transfer	<input type="radio"/>	1411	579132	Female	1/1/1970	0001	NY	3/3/2015	Admission	<input type="radio"/>	1411	834619	Male	1/5/1993	4151	TE	7/1/2015	Transfer
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<p>10</p>	<p>The “<i>Client Search Results</i>” page allows you to sort by any criteria visible on the page, (e.g., Provider Client ID, Birth Date, or Last 4 SSN).</p> <p>Click the shaded column heading to sort by the results of that field in ascending order. If you want to reverse the order of the sort (i.e., descending order), click the same shaded column heading again.</p> <p>For example, if you click on the Provider Client ID column heading, it will start the list with the lowest value first. If you click on it again, it will start with the highest value. These two results are shown in the two examples to the right.</p>	<p>Client Search Results Provider : 99999 - Anonymous Provider</p> <p>Select Client [] Go Client Details & Episode History</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>1411</td> <td>235461</td> <td>Male</td> <td>3/30/1990</td> <td>0330</td> <td>SW</td> <td>6/15/2015</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>334466</td> <td>Male</td> <td>7/4/1979</td> <td>0704</td> <td>SE</td> <td>7/1/2015</td> <td>Transfer</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>579132</td> <td>Female</td> <td>1/1/1970</td> <td>0001</td> <td>NY</td> <td>3/3/2015</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>834619</td> <td>Male</td> <td>1/5/1993</td> <td>4151</td> <td>TE</td> <td>7/1/2015</td> <td>Transfer</td> </tr> </tbody> </table> <p>Client Search Results Provider : 99999 - Anonymous Provider</p> <p>Select Client [] Go Client Details & Episode History</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>1411</td> <td>834619</td> <td>Male</td> <td>1/5/1993</td> <td>4151</td> <td>TE</td> <td>7/1/2015</td> <td>Transfer</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>579132</td> <td>Female</td> <td>1/1/1970</td> <td>0001</td> <td>NY</td> <td>3/3/2015</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>334466</td> <td>Male</td> <td>7/4/1979</td> <td>0704</td> <td>SE</td> <td>7/1/2015</td> <td>Transfer</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>235461</td> <td>Male</td> <td>3/30/1990</td> <td>0330</td> <td>SW</td> <td>6/15/2015</td> <td>Admission</td> </tr> </tbody> </table>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	1411	235461	Male	3/30/1990	0330	SW	6/15/2015	Admission	<input type="radio"/>	1411	334466	Male	7/4/1979	0704	SE	7/1/2015	Transfer	<input type="radio"/>	1411	579132	Female	1/1/1970	0001	NY	3/3/2015	Admission	<input type="radio"/>	1411	834619	Male	1/5/1993	4151	TE	7/1/2015	Transfer	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	1411	834619	Male	1/5/1993	4151	TE	7/1/2015	Transfer	<input type="radio"/>	1411	579132	Female	1/1/1970	0001	NY	3/3/2015	Admission	<input type="radio"/>	1411	334466	Male	7/4/1979	0704	SE	7/1/2015	Transfer	<input type="radio"/>	1411	235461	Male	3/30/1990	0330	SW	6/15/2015	Admission
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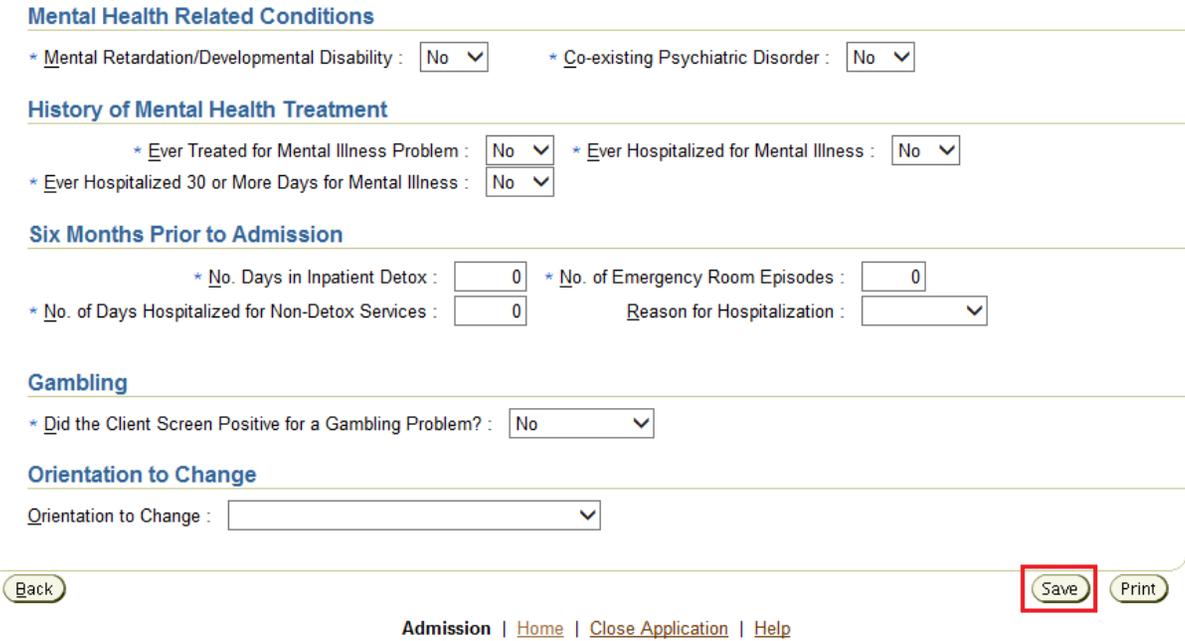
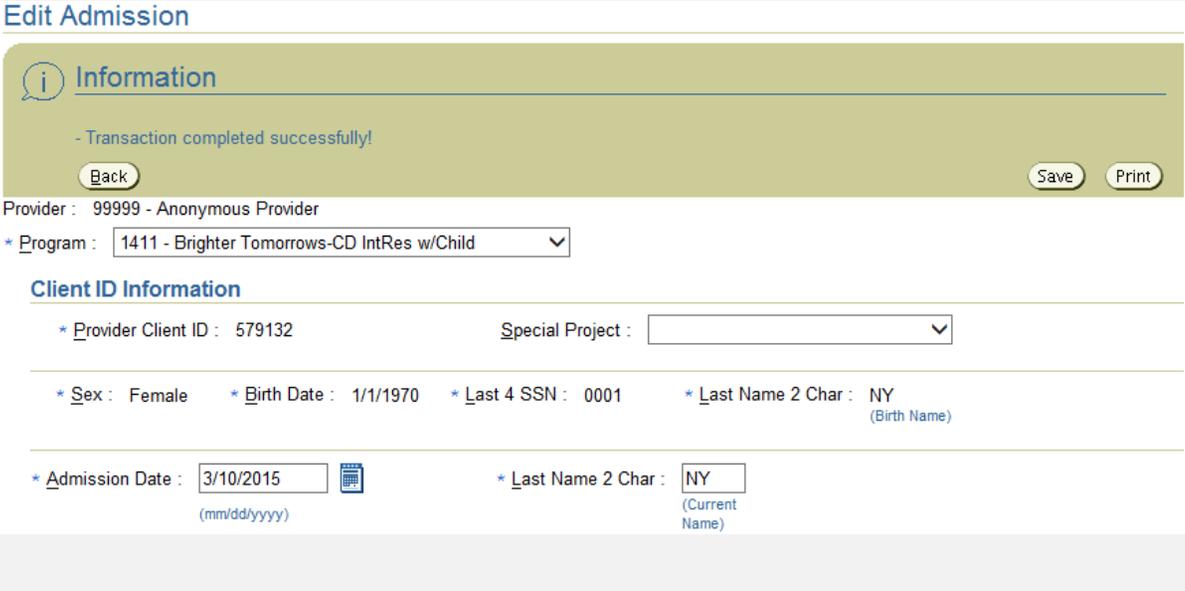
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<p>11</p>	<p>This screen shows the list resorted in descending order (highest to lowest value) by Provider Client ID.</p> <p>For this User Guide, the Admission transaction for the client whose Provider Client ID is “579132” will be updated.</p> <p>First, you must select the client. Since the list was sorted twice by Provider Client ID, she is now the first client on the list.</p> <p>To select the client whose information needs updating, click the radio button (○) in the “Select” column next to him/her. In this example, it is the client whose Provider Client ID is “579132.”</p>	 <p>Client Search Results Provider : 99999 - Anonymous Provider</p> <p>Select Client [dropdown] [Go] Client Details & Episode History</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>1411</td> <td>834619</td> <td>Male</td> <td>1/5/1993</td> <td>4151</td> <td>TE</td> <td>7/1/2015</td> <td>Transfer</td> </tr> <tr> <td><input checked="" type="radio"/></td> <td>1411</td> <td>579132</td> <td>Female</td> <td>1/1/1970</td> <td>0001</td> <td>NY</td> <td>3/3/2015</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>334466</td> <td>Male</td> <td>7/4/1979</td> <td>0704</td> <td>SE</td> <td>7/1/2015</td> <td>Transfer</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>235461</td> <td>Male</td> <td>3/30/1990</td> <td>0330</td> <td>SW</td> <td>6/15/2015</td> <td>Admission</td> </tr> </tbody> </table> <p>[Back]</p>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	1411	834619	Male	1/5/1993	4151	TE	7/1/2015	Transfer	<input checked="" type="radio"/>	1411	579132	Female	1/1/1970	0001	NY	3/3/2015	Admission	<input type="radio"/>	1411	334466	Male	7/4/1979	0704	SE	7/1/2015	Transfer	<input type="radio"/>	1411	235461	Male	3/30/1990	0330	SW	6/15/2015	Admission
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<p>12</p>	<p>Next, click the Client Details & Episode History button to open the “<i>Client Information</i>” page for the selected client.</p> <p>It is in the upper right corner of the “<i>Client Search Results</i>” page next to the Go button.</p>	 <p>Client Search Results Provider : 99999 - Anonymous Provider</p> <p>Select Client [dropdown] [Go] Client Details & Episode History</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program No</th> <th>Provider Client ID</th> <th>Sex</th> <th>Birth Date</th> <th>Last 4 SSN</th> <th>Last Name 2 Char</th> <th>Transaction Date</th> <th>Transaction Type</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td>1411</td> <td>834619</td> <td>Male</td> <td>1/5/1993</td> <td>4151</td> <td>TE</td> <td>7/1/2015</td> <td>Transfer</td> </tr> <tr> <td><input checked="" type="radio"/></td> <td>1411</td> <td>579132</td> <td>Female</td> <td>1/1/1970</td> <td>0001</td> <td>NY</td> <td>3/3/2015</td> <td>Admission</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>334466</td> <td>Male</td> <td>7/4/1979</td> <td>0704</td> <td>SE</td> <td>7/1/2015</td> <td>Transfer</td> </tr> <tr> <td><input type="radio"/></td> <td>1411</td> <td>235461</td> <td>Male</td> <td>3/30/1990</td> <td>0330</td> <td>SW</td> <td>6/15/2015</td> <td>Admission</td> </tr> </tbody> </table> <p>[Back]</p>	Select	Program No	Provider Client ID	Sex	Birth Date	Last 4 SSN	Last Name 2 Char	Transaction Date	Transaction Type	<input type="radio"/>	1411	834619	Male	1/5/1993	4151	TE	7/1/2015	Transfer	<input checked="" type="radio"/>	1411	579132	Female	1/1/1970	0001	NY	3/3/2015	Admission	<input type="radio"/>	1411	334466	Male	7/4/1979	0704	SE	7/1/2015	Transfer	<input type="radio"/>	1411	235461	Male	3/30/1990	0330	SW	6/15/2015	Admission
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<input type="radio"/>	1411	235461	Male	3/30/1990	0330	SW	6/15/2015	Admission																																							

Step	Instructions	Image
<p>13</p>	<p>This is the resulting “<i>Client Information</i>” page. The top of the page contains four client tracking fields (i.e., Sex, Birth Date, Last 4 SSN, Last Name 2 Char) for the selected client. The bottom section contains the client’s Episode History, including one or more transactions.</p> <p>In addition to updating an Admission transaction from this page, you can also update a variety of other transactions that may appear under the Episode History section (e.g., Transfer, Transition, Discharge, Crisis, Waiting List, Assessment, and Opioid Treatment Annual Update).</p>	<p>The screenshot shows the OASAS 'Client Information' page. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' links. The main content area is titled 'Client Information' and shows the provider as '99999 - Anonymous Provider'. Below this, the 'Client Details' section includes fields for Sex (Female), Birth Date (1/1/1970), Last 4 SSN (0001), and Last Name 2 Char (NY). A 'Change Client Information' button is located below these fields. The 'Episode History' section contains a table with one entry: Program 1411, Program Name 'Brighter Tomorrows-CD IntRes w/Child', Provider Client ID 579132, Transaction 'Admission', and Transaction Date 3/3/2015. The page also features buttons for 'New Element Transition', 'Update', 'Delete', 'Back', 'Children in Residence', and 'Print'.</p>

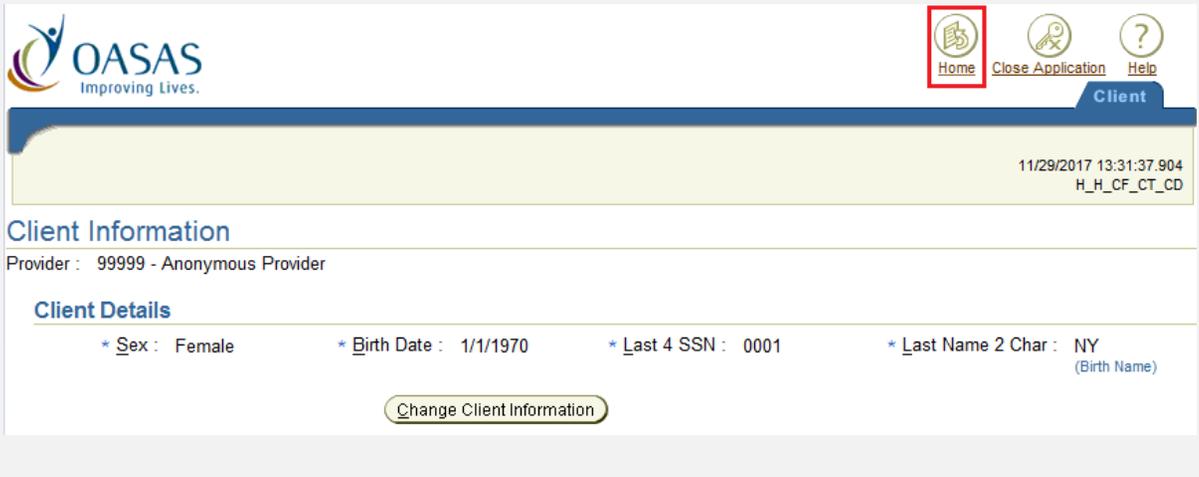
Step	Instructions	Image														
<p>14</p>	<p>Under the Episode History section, you will first need to select the transaction to be updated for that client by clicking the check box (<input type="checkbox"/>) in the “Select” column for that transaction.</p> <p>Click on the check box (<input type="checkbox"/>) in the “Select” column for the client’s existing transaction (e.g., Admission).</p> <p>NOTE: In this example, the Admission transaction being edited is the only one available for this client. Even if there is only one transaction listed, you must still click the check box (<input type="checkbox"/>) .</p> <p>Next click the Update button to open the transaction that was selected.</p>	 <p>Client Information Provider : 99999 - Anonymous Provider</p> <p>Client Details * Sex : Female * Birth Date : 1/1/1970 * Last 4 SSN : 0001 * Last Name 2 Char : NY <small>(Birth Name)</small></p> <p>Change Client Information</p> <p>Episode History</p> <p>New Element Transition Update Delete</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Program</th> <th>Program Name</th> <th>Provider Client ID</th> <th>Transaction</th> <th>Transaction Date</th> <th>Transaction Out Date</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>1411</td> <td>Brighter Tomorrows-CD IntRes w/Child</td> <td>579132</td> <td>Admission</td> <td>3/3/2015</td> <td></td> </tr> </tbody> </table> <p>Back Children in Residence Print</p> <p>Client Home Close Application Help</p>	Select	Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date	<input checked="" type="checkbox"/>	1411	Brighter Tomorrows-CD IntRes w/Child	579132	Admission	3/3/2015	
Select	Program	Program Name	Provider Client ID	Transaction	Transaction Date	Transaction Out Date										
<input checked="" type="checkbox"/>	1411	Brighter Tomorrows-CD IntRes w/Child	579132	Admission	3/3/2015											

Step	Instructions	Image
15	<p>The “<i>Edit Admission</i>” page is then opened, where you can update information in any of the existing fields.</p> <p>In this User Guide, you will be shown how to change the date in the Admission Date field, and then save the form.</p>	 <p>The screenshot shows the OASAS 'Edit Admission' page. At the top right, there are navigation icons for Home, Close Application, and Help, along with the text 'Admission' and a timestamp '11/29/2017 12:53:53.917 H_H_CF_CT_CD_A2v5'. The main content area is titled 'Edit Admission' and includes the following fields:</p> <ul style="list-style-type: none"> Provider: 99999 - Anonymous Provider * Program: 1411 - Brighter Tomorrows-CD IntRes w/Child (dropdown menu) * Admission Date: 3/3/2015 (calendar icon, highlighted with a red box in the original image) * Last Name 2 Char: NY (Current Name) * Sex: Female * Birth Date: 1/1/1970 * Last 4 SSN: 0001 * Last Name 2 Char: NY (Birth Name) * Special Project: (dropdown menu) * Provider Client ID: 579132 TRS-61: Identifying Information (ID) <ul style="list-style-type: none"> ID Consent Date: (calendar icon) ID Consent Revoke Date: (calendar icon, note: (ID Consent Revoke Date not required)) Last Name: (text input)

Step	Instructions	Image
<p>16</p>	<p>To change the Admission Date, you would enter the appropriate date (e.g., 3/10/2015) by typing it in the Admission Date field, or by clicking on the calendar icon to select it from the calendar.</p> <p>When using the keyboard to change this field in the live version of CDS, you must delete the original entry in the Admission Date field before entering the new date.</p> <p>Also, you would need to press the Tab key twice to move to the next field, which is Last Name 2 Char. If you press the Tab key once, it will take you only to the Calendar icon.</p> <p>NOTE: When changing Admission, Transfer, Transition or Discharge dates the system will verify if the date conflicts with other transactions and if so will display an error message.</p>	<p>The screenshot shows the OASAS 'Edit Admission' page. At the top, there is a navigation bar with 'Home', 'Close Application', and 'Help' links. The main content area is titled 'Edit Admission' and includes the following fields:</p> <ul style="list-style-type: none"> Provider: 99999 - Anonymous Provider * Program: 1411 - Brighter Tomorrows-CD IntRes w/Child Client ID Information <ul style="list-style-type: none"> * Provider Client ID: 579132 Special Project: [Dropdown] * Sex: Female * Birth Date: 1/1/1970 * Last 4 SSN: 0001 * Last Name 2 Char: NY (Birth Name) * Admission Date: 3/3/2015 (mm/dd/yyyy) with a calendar icon highlighted in red. * Last Name 2 Char: NY (Current Name) TRS-61: Identifying Information (ID) <ul style="list-style-type: none"> ID Consent Date: [Field] (mm/dd/yyyy) with a calendar icon. ID Consent Revoke Date: [Field] (ID Consent Revoke Date not required) with a calendar icon. Last Name: [Field]

Step	Instructions	Image
<p>17</p>	<p>Once you are done entering information, scroll down to the bottom of the page to save the data.</p> <p>Click the Save button to save the changed data (e.g., Admission Date).</p>	 <p>Mental Health Related Conditions</p> <p>* <u>M</u>ental Retardation/Developmental Disability : <input type="text" value="No"/> * <u>C</u>o-existing Psychiatric Disorder : <input type="text" value="No"/></p> <p>History of Mental Health Treatment</p> <p>* <u>E</u>ver Treated for Mental Illness Problem : <input type="text" value="No"/> * <u>E</u>ver Hospitalized for Mental Illness : <input type="text" value="No"/></p> <p>* <u>E</u>ver Hospitalized 30 or More Days for Mental Illness : <input type="text" value="No"/></p> <p>Six Months Prior to Admission</p> <p>* <u>N</u>o. Days in Inpatient Detox : <input type="text" value="0"/> * <u>N</u>o. of Emergency Room Episodes : <input type="text" value="0"/></p> <p>* <u>N</u>o. of Days Hospitalized for Non-Detox Services : <input type="text" value="0"/> Reason for Hospitalization : <input type="text"/></p> <p>Gambling</p> <p>* <u>D</u>id the Client Screen Positive for a Gambling Problem? : <input type="text" value="No"/></p> <p>Orientation to Change</p> <p>Orientation to Change : <input type="text"/></p> <p><input type="button" value="Back"/> <input type="button" value="Save"/> <input type="button" value="Print"/></p> <p style="text-align: center;">Admission Home Close Application Help</p>
<p>18</p>	<p>Once the change has been successfully completed, the screen will show the message “Transaction completed successfully!” (as shown in this example).</p> <p>NOTE: If you have any errors, error messages will be displayed at the top of the page. The first part of each error message will contain a link to the item in error. If that occurs, click the error link to move to that item and correct the data. The field in error will be preceded by a red “X” and the error message will appear below it.</p> <p>Correct the error and click the Save button to finalize the changes.</p>	 <p>Edit Admission</p> <p>Information</p> <p>- Transaction completed successfully!</p> <p><input type="button" value="Back"/> <input type="button" value="Save"/> <input type="button" value="Print"/></p> <p>Provider : 99999 - Anonymous Provider</p> <p>* Program : <input type="text" value="1411 - Brighter Tomorrows-CD IntRes w/Child"/></p> <p>Client ID Information</p> <p>* <u>P</u>rovider Client ID : 579132 Special Project : <input type="text"/></p> <p>* <u>S</u>ex : Female * <u>B</u>irth Date : 1/1/1970 * <u>L</u>ast 4 SSN : 0001 * <u>L</u>ast Name 2 Char : NY (Birth Name)</p> <p>* <u>A</u>dmission Date : <input type="text" value="3/10/2015"/> * <u>L</u>ast Name 2 Char : <input type="text" value="NY"/> (Current Name)</p>

Enter Children into Client Record

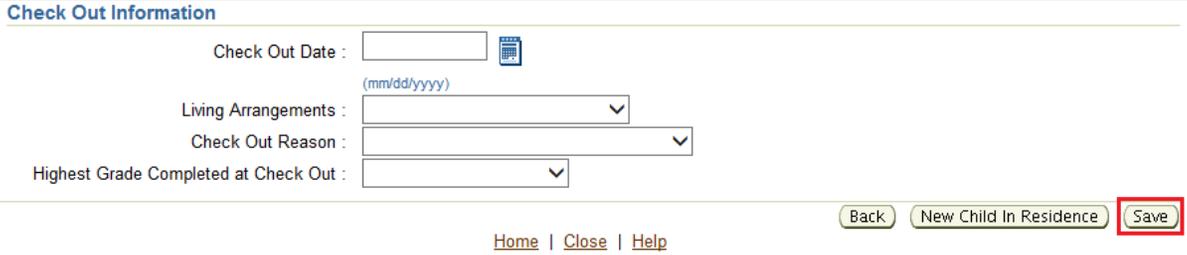
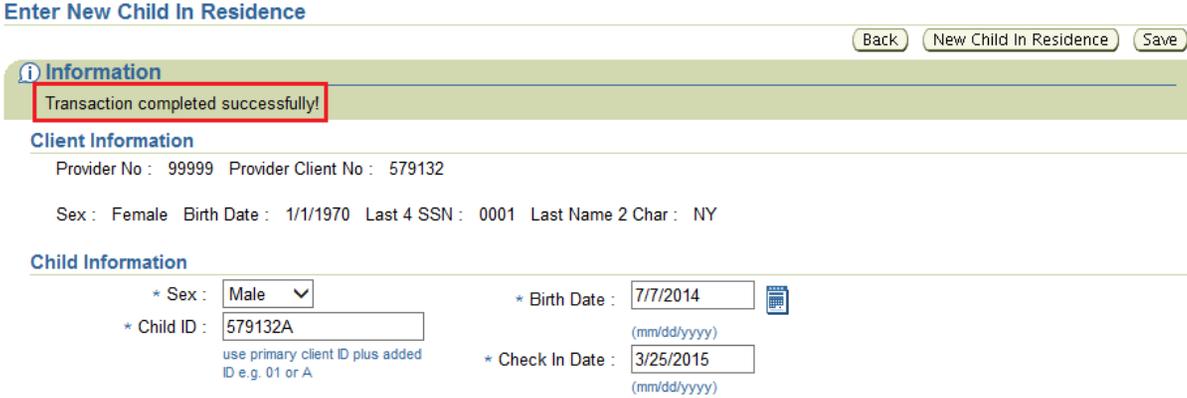
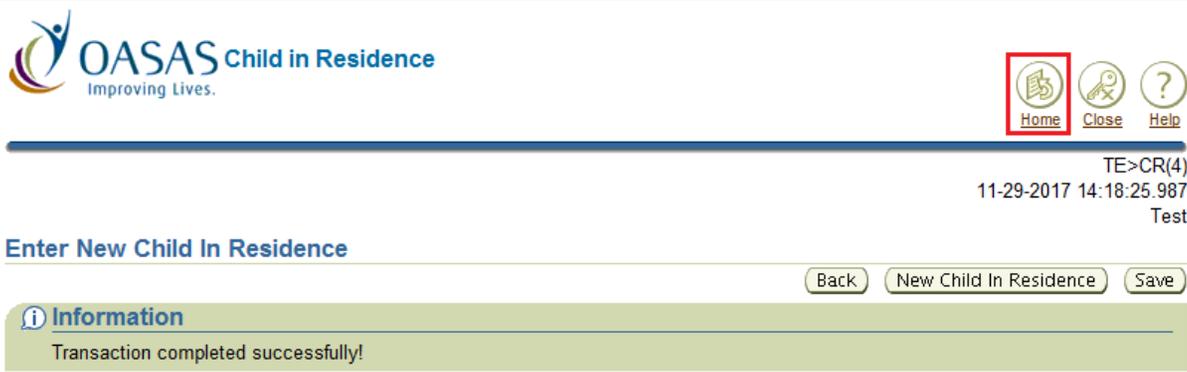
Step	Instructions	Image
19	<p>To enter a child in residence for the same client you are currently working on (as in this example), click the Back button at the bottom of the page you are updating to go back to the client's "<i>Client Information</i>" page and then click Children in Residence.</p>	 <p>The screenshot shows the 'Client Information' page for a provider. It includes sections for 'Client Details' (Sex: Female, Birth Date: 1/1/1970, Last 4 SSN: 0001, Last Name 2 Char: NY) and 'Episode History'. A table in the 'Episode History' section lists a transaction for 'Brighter Tomorrows-CD IntRes w/Child' on 3/10/2015. At the bottom, the 'Children in Residence' button is highlighted with a red box, along with 'Back' and 'Print' buttons.</p>
20	<p>If you want to add children in residence for clients other than the one you are currently working on, you must first click the Home button at the top of the page to search for a different client.</p> <p>NOTE: You can also enter a child in residence for a client using the Children in Residence button at the bottom of the Admission page.</p>	 <p>The screenshot shows the OASAS logo and navigation icons at the top. The 'Home' icon is highlighted with a red box. Below the navigation bar, the 'Client Information' page is visible, showing the same client details as in the previous screenshot.</p>

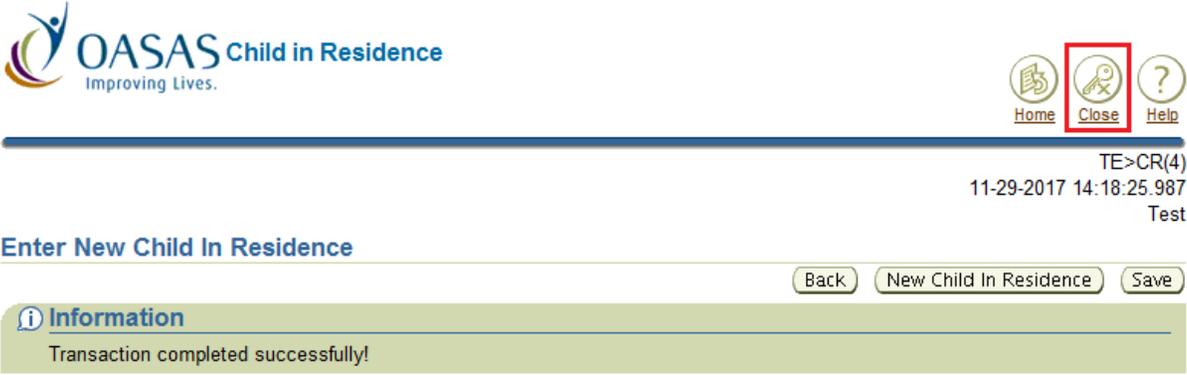
Step	Instructions	Image
<p>21</p>	<p>In this example, a child is being checked in for the same client who was admitted into Program 1411 on 3/10/2015 and whose Provider Client ID is 579132.</p> <p>To admit a child in residence, you will first select the relevant Admission transaction by clicking on the check box (<input type="checkbox"/>) in the “Select” column to choose the client’s appropriate Admission transaction.</p> <p>Even if there is only one transaction listed, you must still click the check box (<input type="checkbox"/>)</p> <p>After you have selected the appropriate transaction, you must then use the Children in Residence button to first view the client’s current list of children in residence.</p>	<p>The screenshot displays the 'Image' section of a client record. It includes a 'Client Details' section with fields for Sex (Female), Birth Date (1/1/1970), Last 4 SSN (0001), and Last Name 2 Char (NY). Below this is an 'Episode History' table with columns for Select, Program, Program Name, Provider Client ID, Transaction, Transaction Date, and Transaction Out Date. A single row is shown with a checked box in the 'Select' column. At the bottom right, the 'Children in Residence' button is highlighted with a red box.</p>

Step	Instructions	Image
<p>22</p>	<p>This is the “<i>View Child in Residence</i>” page, where you begin entering a child. This page lists any of the client’s children already entered (i.e., “checked in”).</p> <p>The client in this example does not yet have a child in residence listed for this program admission. This User Guide will show how to enter one child for this client, although multiple children can be added if applicable.</p> <p>NOTE: You would also use this page to delete a child in residence (e.g., if mistakenly entered) by selecting the child and then clicking the Delete Selected Children in Residence button.</p> <p>NOTE: To update existing information on a child in residence, you would also begin from this page (e.g., to “check out” a child from the program). If any children were listed, you would select the appropriate child and then click the Update button (not shown here), which would appear next to the “Children in Residence” heading. Then you would make the needed changes and save the data.</p> <p>To check in a new child in residence, click the New Child in Residence button to open the “<i>Enter New Child in Residence</i>” page.</p>	

Step	Instructions	Image
23	<p>This is the “<i>Enter New Child in Residence</i>” page, where the child’s information is to be completed.</p> <p>NOTE: The Child ID is the same as the Primary Client’s ID with an identifier added at the end (e.g., 01, 02, A, B). In this demonstration, the Child ID will include an “A” added to the end.</p>	<p>Enter New Child In Residence</p> <p>Back New Child In Residence Save</p> <p>Client Information Provider No : 99999 Provider Client No : 579132 Sex : Female Birth Date : 1/1/1970 Last 4 SSN : 0001 Last Name 2 Char : NY</p> <p>Child Information * Sex : <input type="text"/> <input type="text"/> * Birth Date : <input type="text"/> <input type="text"/> * Child ID : <input type="text"/> (mm/dd/yyyy) use primary client ID plus added ID e.g. 01 or A * Check In Date : <input type="text"/> (mm/dd/yyyy)</p> <p>Demographics * Race : <input type="text"/> * Hispanic Origin : <input type="text"/> * Type of Residence : <input type="text"/> * Highest Grade Completed at Check-in : <input type="text"/></p>

Step	Instructions	Image
<p>24</p>	<p>This is how the main fields for the “<i>Enter a New Child in Residence</i>” might look when they are filled out.</p> <p>This is all the required information you would need to enter to admit the child into residence.</p>	<p>Client Information Provider No : 99999 Provider Client No : 579132 Sex : Female Birth Date : 1/1/1970 Last 4 SSN : 0001 Last Name 2 Char : NY</p> <p>Child Information * Sex : Male * Birth Date : 7/7/2014 * Child ID : 579132A use primary client ID plus added ID e.g. 01 or A * Check In Date : 3/25/2015</p> <p>Demographics * Race : White * Hispanic Origin : Not of Hispanic Origin * Type of Residence : Private Residence * Highest Grade Completed at Check-in : No education</p> <p>Physical Health-Related Conditions * Hearing Impairment : No * Mobility Impairment : No * Other Major Physical Health Condition : No * Speech Impairment : No * Sight Impairment : No</p> <p>Mental Health-Related Conditions * Intellectual Disability/Developmental Disability : No * Co-existing Psychiatric Disorder : No</p> <p>Six Months Prior to Admission * No. of Days Hospitalized : 0 * Number of ER Visits : 0 Reason for Hospitalization :</p>
<p>25</p>	<p>NOTE: The last four fields on this page (Check Out Information) are to be completed at the time the child is checked out.</p>	<p>Check Out Information Check Out Date : Living Arrangements : Check Out Reason : Highest Grade Completed at Check Out :</p>

Step	Instructions	Image
26	<p>Finally, you must save the completed Children in Residence information.</p> <p>Click the Save button to save the completed information.</p>	 <p>Check Out Information</p> <p>Check Out Date : <input type="text"/>  <small>(mm/dd/yyyy)</small></p> <p>Living Arrangements : <input type="text"/></p> <p>Check Out Reason : <input type="text"/></p> <p>Highest Grade Completed at Check Out : <input type="text"/></p> <p style="text-align: right;"> Home Close Help Back New Child In Residence Save </p>
27	<p>When the transaction has been saved successfully, you will see the following confirmation message: “Transaction completed successfully!”</p> <p>NOTE: If there are any errors created when saving the entered data, error messages will appear at the top of the page. For more details on how to correct errors, see the “Enter a CDS Admission” tutorial.</p>	 <p>Enter New Child In Residence</p> <p style="text-align: right;">Back New Child In Residence Save</p> <p>Information</p> <p>Transaction completed successfully!</p> <p>Client Information</p> <p>Provider No : 99999 Provider Client No : 579132</p> <p>Sex : Female Birth Date : 1/1/1970 Last 4 SSN : 0001 Last Name 2 Char : NY</p> <p>Child Information</p> <p>* Sex : <input type="text" value="Male"/></p> <p>* Birth Date : <input type="text" value="7/7/2014"/>  <small>(mm/dd/yyyy)</small></p> <p>* Child ID : <input type="text" value="579132A"/> <small>use primary client ID plus added ID e.g. 01 or A</small></p> <p>* Check In Date : <input type="text" value="3/25/2015"/> <small>(mm/dd/yyyy)</small></p>
28	<p>To return to the “CDS Home” page to perform a different task, click the Home button at the top of the page.</p>	 <p>OASAS Child in Residence <small>Improving Lives.</small></p> <p style="text-align: right;">  Home  Close  Help </p> <p style="text-align: right;">TE>CR(4) 11-29-2017 14:18:25.987 Test</p> <p>Enter New Child In Residence</p> <p style="text-align: right;">Back New Child In Residence Save</p> <p>Information</p> <p>Transaction completed successfully!</p>

Step	Instructions	Image
29	<p>Once you are finished updating the transactions as needed, you can return to the <i>OASAS Applications</i> page by clicking on the Close Application button and exiting the application.</p>	 <p>The screenshot shows the OASAS Child in Residence application interface. At the top left is the logo with the text "OASAS Child in Residence" and "Improving Lives." Below the logo is a horizontal line. On the right side, there are three circular icons: "Home", "Close" (highlighted with a red box), and "Help". Below these icons, the text "TE>CR(4)", "11-29-2017 14:18:25.987", and "Test" is displayed. In the center, there is a section titled "Enter New Child In Residence" with a light green background. Below this section are three buttons: "Back", "New Child In Residence", and "Save". At the bottom, there is an "Information" section with a blue header and a message: "Transaction completed successfully!"</p>