

# **COMPREHENSIVE REHABILITATION SERVICES DATA REPORTING SYSTEM USER GUIDE**

The Comprehensive Rehabilitation Services (CRS) Program works in partnership with local community agencies through contracts to provide rehabilitation services to individuals age 15 or above who have a diagnosis of Traumatic Brain Injury (TBI) and/or Traumatic Spinal Cord Injury Post-Acute Rehabilitation Services.

The CRS Data Reporting System is designed for use by Post-Acute Rehabilitation Service (PARS) providers of residential services. Providers of Traumatic Brain Injury (TBI) and Traumatic Spinal Cord Injury (TSCI) –Inpatient Comprehensive Medical Services, Non Residential Rehabilitation Services, and Outpatient Therapy Services are not required to enter data using the CRS Data Reporting System.

The CRS Data Reporting System is designed to track PABI residential services provided to each consumer on a daily basis. Each service entry will reflect key elements required by the CRS program. The data collected is used by CRS Program to analyze and assess services provided to consumers receiving PABI residential services. The CRS Data Reporting System will also be the new mechanism providers will use to report the Mayo Portland Adaptability Inventory- 4 (MPAI) for CRS consumers. This replaces the need to upload this information to the Secure File Transfer Protocol or SFTP site currently in use. MPAI data will consist primarily of MPAI T-scaled scores with one exception, the MPAI Pre-Existing Condition raw score.

This handbook is a guide that provides the user with instructions on how to access the different screens within the system and enter the required service records or MPAI data.

## **HELPFUL TIPS**

### **Using the Tab Key in the System**

While entering data in the system, use the **TAB** key to move to the next data field. If you use the **ENTER** key before entering all the data, the system will display an error message indicating the fields that still need to be entered.

### **System Timeout**

The system times out after 20 minutes of no activity.

### **System Lockout**

The system will lock a user's account after five unsuccessful attempts to log in to the system. If this occurs, please select reset password and the system will allow the user to reset their password and access the system. If this process is

unsuccessful, please email the CRS Program and the user's account will be unlocked.

### **Constraints**

The information available in the CRS Data Reporting System will be limited to service records and MPAI date entered by the PABI residential provider.

No consumer data is pre-populated in this system for PABI residential providers.

The CRS Data Reporting System does not link directly with the CRS case management system, making the need for accurate data entry of key data elements (such as case identification numbers and service authorization numbers) even more critical.

### **Confidentiality**

All information contained in the CRS Data Reporting System is confidential and parameters pertaining to confidential information apply to all users of this system.

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# Chapter 1: Accessing the CRS Data Reporting System

## 1.1 Website Location

The CRS Data Reporting System can be accessed at the following URL:

<https://dmzwebdev.dars.state.tx.us/prod/crs>

## 1.2 User Agreement and Log In

All users must read and agree to the terms and conditions on this user agreement in order screen to access CRS Data Reporting System. After the user has read the terms and conditions, the user may login to the system by entering the user name and password and selecting **sign in**. If the user does not agree to the terms and conditions, the user may close the screen to exit the system.

Screen Shot 1: User's Agreement

**CRS User's Agreement**

**When entering this system, the user agrees to the following terms and conditions:**

Information about consumers of HHSC services is strictly confidential under federal and state laws and HHSC policy.

Use of consumer information for purposes other than the provision of services is prohibited. For additional information go to HHSC Business Procedures Manual regarding: Confidentiality and Use of Consumer Records and Information.

Any questions regarding appropriate use of consumer information or reports of observed abuse should be discussed with your supervisor.

Use of this system is subject to monitoring. Abusers will be subject to disciplinary action and/or criminal prosecution.

If you do not agree to abide by the above terms and conditions, close.

Please enter your username and password.

**Account Information**

Email/User name

Password

[Forgot Password](#)

If a user does not have access rights, has been inactive, or typed in an incorrect user name and/or password, the user will see the following error message: **Login was unsuccessful. Please correct the errors and try again. ERROR: The user name or password provided is incorrect.**

On the log in screen, there is a “forgot password” option from which a user may also reset his/her password.

## Chapter 2: Navigating the System

### 2.1 Static Options

Users have access to several static options to assist with accessibility when using the system, which includes Skip to Content, Zoom Layout, Short Cut Keys, and Welcome.

### 2.2 Welcome Field

The **Welcome** field displays the name of the user currently logged in. The user name will appear above the **Case Search** box.

### 2.3 Zoom Layout

When the user selects the **Zoom Layout** option, the system will zoom into the content on the screen.

### 2.4 Top Navigation

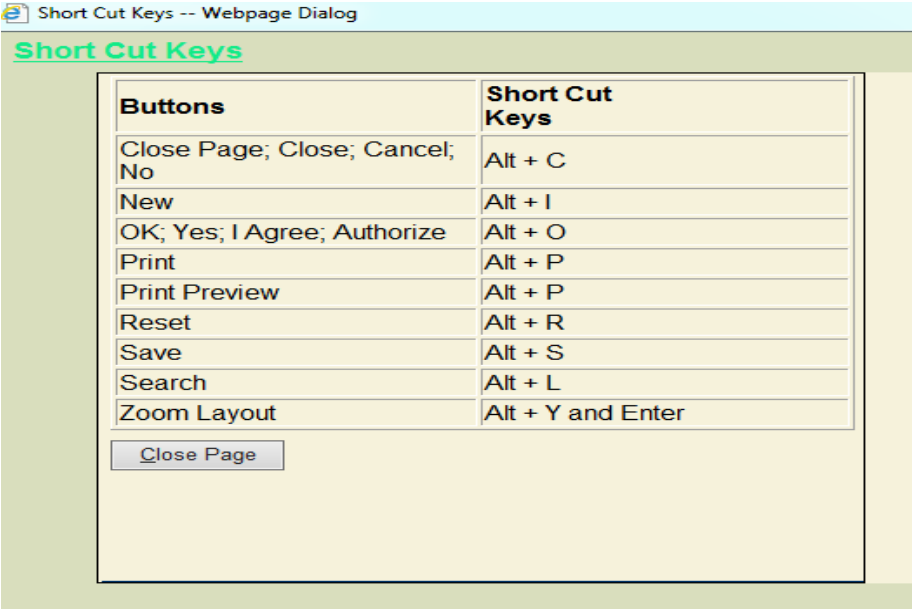
The application also populates a top navigation menu consisting of these options:

- Provider Administrators- the options are Case Search, My Account and Provider Admin (Administrator).
- Case Management – the options are Case Search and My Account.
- Provider Upload Only – the options are My Account and Provider Admin (Upload and Uploaded are the only options under Provider Admin option available for this user role).

### 2.5 Accessibility

When the user selects the **Accessibility** option, the application opens the **Short Cut Keys** page. These are keyboard short cuts for the user.

Screen Shot 2: Accessibility/Short Cut Keys



The screenshot shows a web browser window titled "Short Cut Keys -- Webpage Dialog". The page content is titled "Short Cut Keys" and features a table with two columns: "Buttons" and "Short Cut Keys". Below the table is a "Close Page" button.

Buttons	Short Cut Keys
Close Page; Close; Cancel; No	Alt + C
New	Alt + I
OK; Yes; I Agree; Authorize	Alt + O
Print	Alt + P
Print Preview	Alt + P
Reset	Alt + R
Save	Alt + S
Search	Alt + L
Zoom Layout	Alt + Y and Enter

Close Page

## Chapter 3: Provider Roles

Users may be assigned one of three types of roles in the CRS Data Reporting System: Provider Administrator, Case Management, or Provider Upload Only. It is important to remember that users can only have one assigned role in the CRS Data Reporting System. If more than one option is selected, an error message will be generated and displayed on the screen. All users will have access to the My Account tab which allows the user to change their password.

### 3.1 Provider Administrator

Provider administrators are designated by a facility and have user rights to add, modify or inactivate an employee's access to the CRS Data Reporting System. Provider Administrators can upload, edit, manually enter or cancel both service records and MPAI data uploaded as well as search cases in the CRS System on behalf of the PABI residential facility. Users with this designation can prompt an email to be sent to a user who can then reset his/her password. The Provider Administrator will have access to the provider facility information.

The screen shot below is the first screen a Provider Administrators sees after login to the CRS Data Reporting System.

Screen Shot 3: Provider Administrator Options

The screenshot displays the 'Case Search' interface for a Provider Administrator. The top navigation bar includes 'Case Search', 'My Account', and 'Provider Admin' tabs, with 'User Name: Trainer 1' displayed on the right. The 'Case Search' tab is selected. The main area contains the following fields and controls:

- Case ID**: Input field
- Local Case Number**: Input field
- CRS Case Number**: Input field
- First Name**: Input field
- Last Name**: Input field
- Provider Name**: Text field containing 'Training'
- Search**: Button
- Reset**: Button
- Export to Excel**: Button

#### 3.1.1 Provider Administrator User Maintenance

Providers with the role of Provider Administrator can perform User Maintenance for their assigned facility (ies). Users with this provider role can assign the following roles to employees in their facility (ies) that will have access to the CRS Data Reporting System. These assigned roles can include Provider Administrator,

Case Management or Provider Upload Only status. Users with this designation can also inactivate an employee who they no longer want to access the CRS Date Reporting System. It is important that Provider Administrators maintain the status of all users.

To enter a new user, select the **NEW** tab at the bottom of the screen. Enter the users first and last name, email address, phone, phone type, user name (same as email address) and select the type of role. The select **Save and Email New User** tab. This will send an email to the newly enter user and allow the user to create a password to access the system.

To change a user's status, select the users last name (in blue), the provider admin can update the contact information or make a user inactive. To make a user inactive enter a date then select **Save**. The screen shot below is an example of the type of information that a Provider Administrator will enter into the User' Maintenance Screen to designate employee roles with respect to the CRS Data Reporting System and the facility (ies) data.

Screen Shot 4: Provider Administrator User Maintenance Screen

The screenshot displays the 'User Maintenance' screen for the 'CRS Post-Acute Rehabilitation Services Data Reporting System'. The header includes the Texas Health and Human Services Commission logo and the system title. A navigation bar shows 'Case Search', 'My Account', and 'Provider Admin' (selected), with a 'User Name: CRS Trainer' indicator. The left sidebar contains 'User Maintenance', 'Upload File', and 'Uploaded Files'. The main form area is titled 'User' and contains the following fields: 'Provider Name: Training', 'First Name: CRS', 'Last Name: Trainer', 'Email: CRS.Trainer@dars.state.tx.us', 'Phone: (512) 555-5555', 'Phone Type: Work' (dropdown), and 'User name: CRS.Trainer@dars.state.tx.us'.

### 3.2 Case Management

Users assigned the provider role of case management have the ability to search for a case record or MPAI data that has been uploaded into the CRS Data Reporting System. They can also access the My Account option to change their password. User's with this designation cannot upload, edit or cancel a service record or MPAI data. The screen with the provider role of Case Management when accessing the CRS Data Reporting System will have the options noted in the screen shot below.

The first screen a user with the provider role of Case Management sees after login to the CRS Data Reporting System is noted in the screen shot below.



## Screen Shot 5: Case Management Options

The screenshot shows the user interface for the "Case Search" feature. At the top, there are navigation links: "Skip to Content", "Zoom Layout", "Accessibility", "User Guide", "Welcome Trainer", and "Log out". The Texas Health and Human Services Commission logo is in the top left. The main heading is "CRS Post-Acute Rehabilitation Services Data Reporting System". Below this, there are tabs for "Case Search" and "My Account", with the user name "Trainer 1" displayed. The "Case Search" tab is active, showing a sidebar with "Case Search" and a main area with the following search fields: "Case ID", "Local Case Number", "CRS Case Number", "First Name", "Last Name", and "Provider Name" (with "Training" selected).

### 3.3 Provider Upload Only

Users with the role of Provider Upload Only access the “Upload File” and “Uploaded File” features. This role allows users to upload CSV/tab delimited workbooks for service record or MPAI data.

The first screen a user with the provider role of Provider Upload Only sees after log in to the CRS Data Reporting System is noted in the screen shot below.

## Screen Shots 6: Provider Upload Only

The screenshot shows the user interface for the "Training" feature. At the top, there are navigation links: "Skip to Content", "Zoom Layout", "Accessibility", "User Guide", "Welcome Trainer", and "Log out". The Texas Health and Human Services Commission logo is in the top left. The main heading is "CRS Post-Acute Rehabilitation Services Data Reporting System" followed by "Training" in large blue text. Below this, there are tabs for "My Account" and "Provider Admin", with the user name "TrainerA 2" displayed. The "Provider Admin" tab is active, showing a sidebar with "Upload File" and "Uploaded Files" and a main area that is currently empty.

## Chapter 4: Uploading a Service Record or MPAI File

### 4.1 Preparing the File in Excel

The CRS Data Reporting System is designed to collect data on therapy services provided as well as MPAI data for consumers who are receiving residential PABI

services. Once the appropriate data is entered into the Excel workbook, the Excel workbook is saved in either a Comma-Separated Value (CSV) or tab delimited (.txt) file and uploaded into the CRS Data reporting System. This format can be used for the service record and the MPAI file.

#### 4.1.1 Comma-Separated Value (CSV) Format

Excel workbook can be saved using Comma-Separated Values or CSV by completing the following steps:

- Open the excel file
- Click on **File** and **Save as**.
- Select where you would like to save this file (desktop or drive).
- In the **File Name** area, name your document (must match column T of the excel workbook).
- In the Save as Type area, select **CSV (Comma Delimited) (\*.csv)** from the drop down menu.
- Click **Save**.
- A warning may be seen about saving format as CSV, select **Yes**.

#### 4.1.2 Tab Delimited Format

Excel workbook can be saved into a tab delimited format by completing the following steps:

- Open the excel file.
- Click the **File** and **Save as**.
- Select where you would like to save this file (desktop or drive).
- In the **File Name** area, name your document (must match column T of the excel workbook).
- In the Save as Type area, select **Text (Tab delimited) (\*.txt)** from the drop down menu.
- Click **Save**.
- A warning may be seen about saving format as Text (tab delimited), select **Yes**

#### 4.2 Data Requirements for Service Records

The correct sequence to enter data per column title: vendor identification (ID), CRS Case Number, Local Case Number, First Name, Last Name, Service Authorization Number, PABI setting, Service Type, CPT Code (optional), HCPC code (optional), Modifier (optional), Modality, Number of Participants (applicable only to group), Provided by, Service Location, Service Location (Other), Start date, Number of Therapists, Quantity and File Name.

##### a. Vendor Identification (ID) Number

Each Vendor (Provider) is assigned a unique vendor identification number. If a Vendor (Provider) has multiple locations, then multiple vendor identification numbers will be issued, one for each facility. For example: If a provider has provider has four facilities, each contracted with the CRS program to provide PABI residential services, then the CRS program would issue one unique facility code for each of those facilities for a total of four vendor codes. The vendor ID number is assigned to PABI residential providers by the CRS program.

**b. CRS Case Number**

This is the assigned case number for each consumer receiving services in the CRS program.

**c. Local Case Number**

Some facilities assign a local case number when a consumer enters the PABI residential program. If a PABI provider assigns consumers a local case number, this may assist the facility and CRS Program should further information or research be needed regarding a specific record. However, if the facility does not use such numbers or does not wish to share this information, the CRS case number may be used instead.

**d. Consumer First Name**

The consumer's legal first are noted in column with this heading. This information should correspond to the information contained on the consumer's legal identification. Users must not use nicknames when entering data into the CRS Data Reporting System.

**e. Consumer Last Name**

The consumer's legal last names are noted in column with this heading. This information should correspond to the information contained on the consumer's legal identification. Users must not use nicknames when entering data into the CRS Data Reporting System.

**f. Service Authorization Number**

Every service authorized by a CRS Counselor has a Service Authorization (SA) generated for the service. Each SA has an assigned number, this number must be on the CSV or tab delimited file or the file cannot be uploaded.

**g. Post-Acute Rehabilitation Services Setting**

Post-Acute Rehabilitation Services (PARS) services are provided in a residential setting. This field is pre-populated with Residential at this time as residential providers are required to use the system.

**h. Service Type**

Service types correlate to the approved therapy services in the service array for Post-Acute Rehabilitation Services Residential providers.

Codes	Service Type
1	Aquatic Therapy
2	Art Therapy
3	Behavior Management
4	Chemical Dependency Counseling/Treatment
5	Cognitive Rehabilitation Therapy (CRT)
6	Family Therapy
7	Message Therapy
8	Mental Restoration
9	Music Therapy
10	Neuropsychiatric Services
11	Neuropsychological Services
12	Occupational Therapy
13	Physical Therapy
14	Recreational Therapy
15	Speech/Language Pathology (Speech Therapy)

**i. Current Procedural Codes (CPT)**

This is an optional field that PARS residential providers can utilize to record CPT codes. Facilities can provide this information if used for billing.

**j. Healthcare Common Procedure Coding System (HCPCS)**

This is an optional field that PARS residential providers can utilize to record HCPCS codes. Facilities can provide this information if used for billing.

**k. Modifiers Code**

Modifier codes may describe whether multiple procedures or services were performed. This is an optional field.

**l. Modality**

The CRS Program has three approved service modalities for the delivery of therapy services in the service array for PARS include: individual, family or group. Service delivery codes correspond to each service modality provided as part of the therapeutic process.

Codes	Modality
1	Individual
2	Family
3	Group

**m. Number of Participants**

The number of individuals who participated in a group session, for CRS consumers the group participation size cannot exceed 10.

**n. Provided by Service Code**

Provided by service codes have been assigned based on the discipline.

<b>Codes</b>	<b>Provide by Service Code</b>
1	Board Certified Behavior Analyst
2	Certified Music Therapist
3	Certified Recreational Therapist
4	Licensed Chemical Dependency Counselor
5	Licensed Clinical Social Worker
6	Licensed Clinical Social Worker-Art Therapist
7	Licensed Psychiatrist
8	Licensed Psychologist
9	Licensed Marriage and Family Therapist
10	Licensed Master Social Worker (supervision required)
11	Licensed Professional Counselor
12	Licensed Professional Counselor-Art Therapist
13	Occupational Therapist
14	Occupational Therapist Assistant
15	Physical Therapist
16	Physical Therapist Assistant
17	Speech Language Pathologist
18	Speech Language Pathologist Assistant
19	Licensed Psychological Associate

**o. Service Location Code:**

Service location codes used to describe five possible locations where the service was provided which includes facility, clinic, community, home and other.

<b>Codes</b>	<b>Service Locations</b>
01	Facility: a contracted site of Post-Acute Rehabilitation Services Residential and Non-Residential Services
02	Clinic: a facility or program for diagnosis and treatment in an outpatient setting.
03	Community: A program or facility with is based in the community in which services are provided to the community in general (not program or person specific) i.e., shopping centers, movie theaters, restaurants.
04	Home: A consumer's place of residence

05	Other (please specify)
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**p. Service Location (Other)**

If “Other” is selected as the service location, the location must be specified.

**q. Start Date**

The start date must be the date of service and the date ranges must be within the in the calendar month reporting. In the CSV or tab delimited file, it is important to ensure that the date is recorded in an eight-digit format. For example, September 1, 2016 must be entered into this data field as 09/01/2016. If the date is not entered in the format noted above, the CSV or tab delimited file will not upload into the CRS Data Reporting System.

**r. Number of Therapists:**

The number of therapists who provided the therapy, i.e., multiple therapists can work together during a therapy session with a consumer but only one therapist can bill for each 15 minute increment of service provided to a consumer at a time. For example: An OT and PT work together with a consumer for one hour. The OT can bill for the first half or the hour, the PT for the second half of the hour but both therapists cannot each bill for one hour of therapy service for the same individual.

**s. Quantity**

Quantity is the number of 15 minute billing increments of therapy services that were provided by each licensed therapist to the consumer per day. For example, on 8/1/2016, a consumer received two hours of PT. The quantity of service for 8/1/2016 for PT would be 8 (2 hours = 8 (15 minute) billing units).

**t. File Name**

The file name entered into the last column of the workbook must match the file name uploaded into the CRS Provider Data Reporting System. File names can be saved using a CSV or tab delimited format. For example: SR\_101.csv or SR\_101.txt

**4.3 Data Requirements for Mayo Portland Adaptability Inventory (MPAI) Files**

The CRS Data Reporting System allows providers to upload scores for the Mayo Portland Adaptability Inventory (MPAI) - 4. This assessment is required at admission, discharge and six months after discharge for consumers receiving services from Post-Acute Rehabilitation Service residential providers. This information include the consumer’s CRS case identification number, consumer’s local case number, first name, last name, PARS service type, PARS admission date, PARS discharge date, evaluation type, evaluation status, MPAI Abilities T-score, MPAI Adjustment T-score, MPAI Participation T-Score, MPAI Total T-Score; MPAI Pre-existing condition raw score; and file name.

Specific information required to complete fields for the MPAI data fields are as follows:

**a. CRS Case Number**

This is the assigned case number for each consumer receiving services in the CRS program.

**b. Local Case Number**

Some facilities assign a local case number when a consumer enters the PABI residential program. If a PABI provider assigns consumers a local case number, this may assist the facility and CRS Program should further information or research be needed regarding a specific record. However, if the facility does not use such numbers or does not wish to share this information, the CRS case number may be used instead.

**c. Consumer First Name**

The consumer's legal first name is noted in column with this heading. This information should correspond to the information contained on the consumer's legal identification. Users must not use nicknames when entering data into the CRS Data Reporting System.

**d. Consumer Last Name**

The consumer's legal last names are noted in column with this heading. This information should correspond to the information contained on the consumer's legal identification. Users must not use nicknames when entering data into the CRS Data Reporting System.

**e. Vendor Identification (ID) Number**

Each Vendor (Provider) is assigned a unique vendor identification number. If a Vendor (Provider) has multiple locations, then multiple vendor identification numbers will be issued, one for each facility. For example: If a provider has four facilities, each contracted with the CRS program to provide PABI residential services, then the CRS program would issue one unique facility code for each of those facilities for a total of four vendor codes. The vendor ID number is assigned to PABI residential providers by the CRS program.

**f. PARS Service Type**

The service type identifies the manner in which services were delivered from the provider. At this time, the only service type available for selection is residential. **Enter the number 1 into this field.**

**g. PARS Admission Date**

The date that the consumer was admitted into post-acute rehabilitation services.

**h. PARS Discharge Date**

The date that the consumer was discharged from the post-acute rehabilitation services.

**i. Evaluation Type**

Evaluation type offers a selection which includes admission, discharge, post-discharge and six month follow-up.

Code	Evaluation Type
1	Assessment
2	Discharge
3	Post Discharge
4	Six Months Following Discharge

**j. Evaluation Status**

There are five options for evaluation status that includes evaluation completed, evaluation incomplete, no evaluation (goals not met), refused to participate and could not locate (post discharge follow-up only).

Code	Evaluation Status
1	Evaluation Completed
2	Evaluation Incomplete
3	No Evaluation (Goals not Met)
4	Refused to Participate
5	Could Not Locate (Post Discharge Follow-up Only)

**k. Evaluation Date**

The date the MPAI assessment was completed by the provider or received by the provider from the consumer (post discharge).

**l. MPAI Ability T-Score**

The Ability Scale assesses sensory, motor and cognitive abilities. Responses in this section are tallied and the sum of these scores converted to T-scores with reference to either the National or the Mayo sample or both as specified in the MPAI-4 guidelines.

**m. MPAI Adjustment T-Score**

The adjustment T-Score assesses mood and interpersonal interactions. Scores for this section are tallied and the sum of these scores converted to T-scores with reference to either the National or the Mayo sample or both as specified in the MPAI-4 guidelines.

**n. MPAI Participation T-Score**



The Participation scale assesses contacts, initiation and money management activities. Responses in this section are totaled and the sum of these scores converted to T-scores with reference to either the National or the Mayo sample or both as specified in the MPAI-4 guidelines.

**o. MPAI Total T-Score**

The Total T-Score is a sum of scores, minus specific items to achieve a total score for the MPAI, which is converted into a T-score using the appropriate table.

**p. MPAI Pre-existing Condition Raw Score**

The MPAI pre-existing condition raw score is obtain from Part D: Pre-existing and associated conditions subscale. This area of assessment does not contribute to the total score but are used to identify pre-injury/post-injury special needs and circumstances.

**q. File Name**

The file name entered into the last column of the workbook must match the file name uploaded into the CRS Provider Data Reporting System. File names can be saved using a CSV or tab delimited format. For example: SR\_101.csv or SR\_101.txt

**4.4 How to Upload a Service Record or MPAI File**

To upload a Service Record or MPAI file:

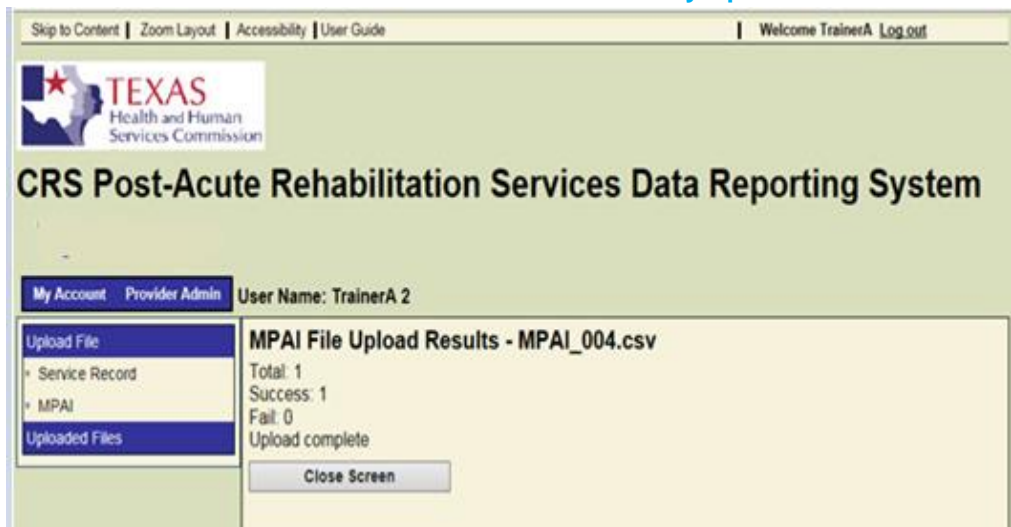
- Select the Provider Administrator tab
- Select Upload File
- Select the Service Record or MPAI
- Screen will show Service Record File Upload Select File
- Select the Browse button
- Select the file to be uploaded
- Select the open option and the file name to be uploaded
- Select Upload and the service record or MPAI file will be uploaded

Screen Shot 7: Uploading a Service Record or MPAI file



When a service record or MPAI record has been successfully uploaded, this pop up box is what the user will see on the screen.

Screen Shot 8: Notification of Successfully Uploaded File



#### 4.5 Verify File Uploaded Successfully

To determine if a file has uploaded, users can check the information by:

- Select the Uploaded Files tab
- Select Service Record Uploaded Files
- All of the files uploaded will be displayed.
- Review **Status** column- The status will show Successful or Validation Error

#### 4.6 Validation Error

If the user receives a Validation Error, Select **Validate** to determine the error in uploading the File. **NOTE: The Validation tab is only to show the error**

message. This does not validate your file upload. Users should consider this a VIEW ONLY option in the CRS Data Reporting System.

Screen Shot 9: Status- Validation Error

Case Search My Account Provider Admin User Name: Trainer 1

User Maintenance  
Upload File  
Uploaded Files  
Service Record Uploaded Files  
MPAI Uploaded Files

**SERVICE RECORD File Upload List**  
Records Returned: 6

Id	Vendor Name	Status	FileName	Created by	Created	Validate Document
<a href="#">301</a>	Training	Validation Error	Smith_001.csv.txt		8/7/2016	<a href="#">Validate</a>
<a href="#">300</a>	Training	Validation Error	MPAI_001.csv	TrainerA 2	8/6/2016	<a href="#">Validate</a>
<a href="#">299</a>	Training	Validation Error	MPAI_001.csv	TrainerA 2	8/6/2016	<a href="#">Validate</a>
<a href="#">298</a>	Training	Validation Error	MPAI_001.csv	TrainerA 2	8/6/2016	<a href="#">Validate</a>
<a href="#">297</a>	Training	Success	SR1_797.csv	CRS Trainer	8/5/2016	<a href="#">Validate</a>
<a href="#">296</a>	Training	Validation Error	MPAI_1234.csv	CRS Trainer	8/5/2016	<a href="#">Validate</a>

Close Screen Export to Excel

If a Service Record contains errors i.e., the information is not in the correct format, an error message specifying the issues will be generated. The issues must be corrected before the file can be uploaded successfully. It is important to note that the **first line of the error message contains the error**. The subsequent text in the error message simply notes how the data was entering into the workbook that was uploaded.

Screen Shot 10: Error Message(s)

No records were inserted into the database. Correct the errors and try again.

The first line of the file must be a header, either comma-delimited(.csv) or tab-delimited(.txt): vendor id;crs case number;local case number;first name;last name;service authorization number;pars setting;service type;cpt;hcpc;modifier;modality;number participants;provided by code;service location;service location other;start date;number therapists;quantity;filename;  
765535;846473;Joe;Public;96;1;5/2/2016;6/1/2016;2;1;1/1/2016;21;107;78;123;24;MPAI\_1234.csv  
- Filename: Can't upload a file with exactly the same data as a previous month under a new file name.

#### 4.7 Correcting Unsuccessful Uploads

The upload document can be viewed by selecting the Case ID and opening the file. NOTE: When viewing CSV or tab delimited files, users should consider the information while in the CRS Data Reporting System as View Only. Any changes made to the file must be saved to your local drive and then re-uploaded into the system. Any changes made to the workbook while in the data reporting system will not automatically save in the system.

User's must correct any errors in the data on the original CSV or tab delimited file and re-upload the file. **The user cannot make changes to the uploaded file in this screen.**

When searching for a service record or MPAl file, users will see this screen. Please note the columns at the bottom of the screen with the column headings Case ID, CRS Case Number, Consumer Name and Provider Name. The CRS Data Reporting System assigns each uploaded service record or MPAl file with a number to facilitate access to the service record/MPAl number and by selecting this number, can assess the information uploaded by the provider on a specific consumer.

## Chapter 5: Viewing and Editing an Uploaded Service Record or MPAl file

### 5.1 How to Search for a Case Record or MPAl File

There will be no cases to search until the provider has successfully completed an uploaded file for the consumer. Once a service record or MPAl for a consumer has been successfully uploaded, users can search for that consumer. The user can access information by entering Case Identification (ID), Local Case Number, and CRS Case Number or by entering the first or last name. The screen shot below illustrates the general appearance of the screen used to search for a case record.

Screen Shot 11: How to Search for a Case

The screenshot shows a web application interface for searching cases. At the top, there are tabs for 'Case Search' and 'My Account', and a user name 'Trainer 1'. The 'Case Search' section contains several input fields: 'Case ID', 'Local Case Number', 'CRS Case Number', 'First Name', and 'Last Name'. Below these is a 'Provider Name' dropdown menu set to 'Training'. There are three buttons: 'Search', 'Reset', and 'Export to Excel'. Below the search fields, it says 'Results: Records Returned: 6'. A table displays the search results with columns for Case ID, CRS Case Number, Consumer Name, and Provider Name.

Case ID	CRS Case Number	Consumer Name	Provider Name
146	1010101	Delbert Day	Training
142	264435	Joe Pubic	Training
143	231233	Joe Pubic	Training
144	999854	Joe Pubic	Training
145	236541	Joe Pubic	Training
141	765535	Joe Pubic	Training

### 5.2 Manually Adding Service Records or MPAl Files

An individual must have at least one service record or MPAl file entry uploaded to the system before a service record or MPAl file can be added manually. To add additional information:

- Go to Case Search tab
- Select Case Search button

- Scroll down the page, available service records or MPAI files will be listed
- Select the service record in which data is to be added by select the blue Case ID Submission number
- All of the data for the consumer selected will be displayed
- Select Service Record or MPAI tab depending on what type of record the user wants to add.
- Select the New Service Record or New MPAI
- A screen with the consumer's name, CRS Case ID number and Local Case Number and blank cells will be available for entering new data will appear
- Enter new data
- Select Save
- All entries pertaining to the consumer's case are displayed
- The information can be exported to an Excel workbook for provider records.

### **5.3 Editing Service Records or MPAI Files**

After data has been uploaded into the CRS Data Reporting System using a either a CSV or tab delimited file workbook, the data can be edited in the CRS Data Reporting System. Edit information contained in a Service Record by:

- Go to Case Search tab
- Select Case Search button
- Scroll down the page, available service records will be listed
- Select the service record or MPAI file to be edited by selecting the blue Case ID number
- Select either service record or MPAI file depending on what you want to edit
- Select service record ID
- All of the data for the consumer selected will be displayed
- A screen with the consumer's name, CRS Case ID number and Local Case Number along with data from the uploaded file will appear
- Data can be edited
- Scroll down to the bottom of the screen
- Select Save
- All entries pertaining to the consumer's case are displayed along with the corrections
- The information can be exported to an Excel workbook for provider records

### **5.4 Canceling a Service Record or MPAI File**

The CRS Data Reporting System allows providers to cancel an uploaded service record. This option allows providers to address errors in data that was incorrectly uploaded or a service record uploaded as one consumer but should actually be for another. To cancel a service record;

- Go to Case Search tab
- Select Case Search button
- Scroll down the page, available service records will be listed

- Select the service record or MPAI file to be edited by selecting the blue Case ID number
- Select either service record or MPAI file depending on what you want to edit
- Select service record ID
- All of the data for the consumer selected will be displayed
- A screen with the consumer's name, CRS Case ID number and Local Case Number along with data from the uploaded file will appear
- Click on cancel service record or MPAI file
- The system will return to the user back to the list of uploaded service records
- The Provider Administrator can check to ensure that the service record was canceled

When Provider Administrator checks to determine if the service record was canceled, by scrolling to the bottom of the screen, the Provider Administrator will see the data fields and cancel button as noted in the screen shot below.

**Screen Shot 12: Canceling a Service Record or MPAI File**

The screenshot displays a web form with the following fields and controls:

- Provided By:** A dropdown menu with the selected value "Occupational Therapist Assistant".
- Service Location:** A dropdown menu with the selected value "Home".
- Service Location Other:** An empty text input field.
- Start Date:** A date input field containing "04/01/2016".
- Number of Therapists:** A text input field containing the number "2".
- Quantity:** A text input field containing the number "1".
- Buttons:**
  - "Cancel Service Record" (a button with a light gray background)
  - "Save" (a button with a light gray background)
  - "Close Screen" (a button with a light gray background)