

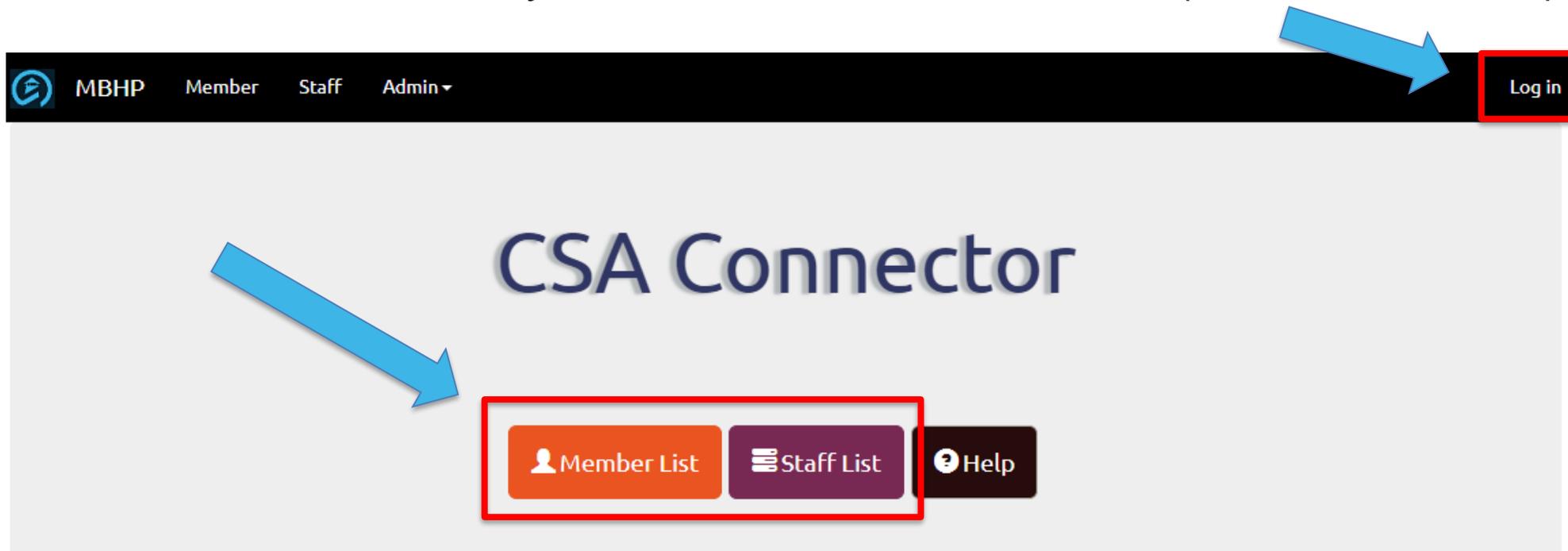
CSA Connector

User Guide



How to View/Enter Data in the New CSA Connector Website

- Navigate to either the production site: www.csaconnector.com or the test site: <http://www.csasbx.com.asp1-101.lan3-1.websitetestlink.com/>
- Select the “log in” link on the top right corner or use one of the buttons in order directly access the desired section (Member or staff).



Member List Overview

Upon logging into the Member section, the complete list of members will be displayed.

CSA Name

Bay State, Coastal

Log off

Member List

Create New Member

Find member by name:

Search

Clear results:

Clear

Select Disposition: All

Filter

Download list:

Download

Youth Name	Referral Date	Date Family Requests ICC	Date Initial Appointment Offered	Date Service Started	ICC Staff Name	Family Partner Name	Age	Timeline	Status	Disposition	Manage
csa1patient1187	09/04/2018				StaffCSA41	NONE			Family Not Yet	New	<ul style="list-style-type: none">EditDetailsDelete

Filter/Download

Manage Member data

Create New Member

The “Create New Member” button allows access to the create Member form.

Member Staff Admin ▾

Member List

 Create New Member

Find member by name:

Search

Clear results:

Clear

Select Disposition:

All

Create New Member Form

Create Member

CSA

Coastal

Youth Name

Please enter youth name

MassHealth ID

Please enter MassHealth ID

Youth Birth Date

Please enter date of birth

Referral Date

Please enter referral date

Referral Source

Select Referral Source

Please enter referral source

Required fields
to create new
Member

Submit Member Data

Once the initial Member data is entered, click on the “Create” button to submit and automatically return to the Member list.

MCE

Discharge Date

Discharge Reason

Create

[◀ Back to List](#)

Edit Member Data

Member List

SearchClear results:

Select Disposition: All

Download list:

	Date Family Requests ICC	Date Initial Appointment Offered	Date Service Started	ICC Staff Name	Family Partner Name	Discharge Date	Timeline	Status	Disposition	Manage
18	10/16/2018			NONE	NONE		17 Day(s)	Waiting		<input type="button" value="Edit"/> <input type="button" value="Details"/> <input type="button" value="Delete"/>

Edit member data

Edit Member Form

Date Family Requests ICC	10/16/2018
Reason Not Started	Waiting because of language capacity ▼
Date Initial Appointment Offered	
ICC Staff Name	Select ICC Staff ▼
Family Partner Name	Select Family Partner ▼
Date Service Started	
Language	Haitian Creole ▼
MCE	Berkshire Fallon Health Collaborative ▼
Discharge Date	
Discharge Reason	Select Discharge Reason ▼
Date Updated	10/16/2018

Save

As additional Member information is gathered, this page should be updated accordingly. Depending upon the type of information Entered, you will be prompted to fill out additional fields.

Member Details

Member List

Search

Clear results: Clear

Select Disposition: All Filter

Download list: Download

	Date Family Requests ICC	Date Initial Appointment Offered	Date Service Started	ICC Staff Name	Family Partner Name	Discharge Date	Timeline	Status	Disposition	Manage
18	10/16/2018			NONE	NONE		17 Day(s)	Waiting because of capacity	Pending Sta	Edit Details Delete

Display Member details

View Member Details

Member Details

CSA	Coastal
Provider	Bay State Community Services Inc.
Youth Name	john jones
MassHealth ID	123456789012
Youth Birth Date	10/10/2008
Referral Date	08/17/2018
Referral Source	Family/Youth
Date Family Requests	10/16/2018
ICC	
Reason Not Started	Waiting because of language capacity
Date Initial Appointment Offered	
ICC Staff Name	NONE
Family Partner Name	NONE
Date Service Started	
Language	Haitian Creole
MCE	Berkshire Fallon Health Collaborative
Discharge Date	
Discharge Reason	
Status	Waiting because of language capacity
Disposition	Pending Start
Date Updated	10/31/2018

 Edit

 Back to List

This page shows the details for a particular Member. The user has the option of editing Member information or returning to the previous page.

Pending Start Filter/Download

Member List

Clear results:

Select Disposition:

ial ment	Date Service Started	ICC Staff Name	Family Partner Name	Timeline
		NONE	NONE	17 Day(s)

Disposition Dropdown:

- All
- All
- New
- Pending Start**
- Active
- Discharged
- Never Started

The Disposition drop-down shows the various disposition options. Select “Pending Start” and then click on the “Filter” button to get the list of Members in “Pending Start.”

Pending Start Filter/Download

Click on the “Download” button to download the list in MS Excel format.

Member List

ults:

Select Disposition:

Download list:

Pending Start Filter/Download

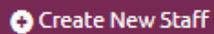
Date Updated
t 10/31/2018
t 11/01/2018

- On the Excel spreadsheet, the “Date Updated” column refers to the last time the Member information has been updated in the system. Any youth whose date is not between the 14th and 21st of the month must be updated. Example: Referral date from October needs an update date between Nov. 14 – Nov. 21.
- *Tip: An easy way to maintain this list would be to update a youth’s record every time the weekly waitlist call has been completed.*

Staff List Overview

“Create New Staff” button allows access to the create staff form.

Staff List

 Create New Staff

Find staff by name:

Search

Clear results:

Clear

Select Active Status:

Active

Filter

Download list:

Download

Staff Name	FTE	Position	Type	Start Date	End Date	Tom #1	Tom #2	Status	TOM #1 Due	TOM #2 Due	Edit
staffcsa1number82	1	FP	FP	07/13/2015		10/15/2015		Active	No	No	
staffcsa1number87	0.8	FP	FP	12/14/2015				Active	No		

Filter/Download

Edit Staff Data

Create New Staff Form

Create Staff

Staff Name
Please enter staff name

FTE
Please enter FTE

Start Date
Please enter start date

Position 
The Position field is required.

Required fields to create staff.

Tom #1

Tom #2

CSA 

[◀ Back to List](#)

Edit Staff Data

Staff List

Search **Clear results:** Clear **Select Active Status:** Active Filter **Download list:** Download

type	Start Date	End Date	Tom #1	Tom #2	Active Status	TOM #1 Due	TOM #2 Due	Edit
P	12/14/2015		11/01/2018		Active	No	No	
P	12/14/2015				Active	Yes	No	

Edit staff data

Edit Staff Form

Edit Staff

Staff Name	<input type="text" value="StaffCSA1Number82"/>
FTE	<input type="text" value="1"/>
Start Date	<input type="text" value="07/13/2015"/>
End Date	<input type="text"/>
Position	<input type="text" value="FP"/> ▼
Tom #1	<input type="text" value="10/15/2018"/>
Tom #2	<input type="text"/>
CSA	<input type="text" value="Coastal"/> ▼

While updating staff information, there may be warnings depending on the information entered. Please follow the warnings in order to enter accurate information.

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Thank you!

