

## Chapter 52 – SED Assessment Form

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#### **Important**

The required fields referenced in this chapter refer to both those required per business rules, and those that are system-required fields. These System-required fields are required in order for the form to be saved in Approved status. The information that is required due to policy may be different from those that are system required.

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# Person Administration Requirements

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**Introduction** Some KAMIS assessments require specific fields within Person Administration be completed before the assessment can be saved in Approved status. Other fields are required per business rules, but are not validated by the system. If system-required fields are left blank, the assessment will return an error message when an attempt is made to save it as Approved, indicating the missing Person Administration fields.

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**Required Fields for Person Administration** Personal Admin / Home Tab:  
***NAME (first) (last)*** – Customer Legal Name  
***Date of Birth***  
***SSN***  
***Marital Status***  
***Gender***  
***Ethnicity***  
***Race***  
***Speaks*** – Defaults to English  
***Reads*** – Defaults to English  
***Understands Only*** – Defaults to English

A **Residential Address Type** with:

***Street***

***City***

***County*** – If out of state – use County "ZZ"

***State*** – If out of country – use State "ZZ"

***Zip***

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**Page Navigation** **The Main navigational tab (page) in KAMIS forms must be saved before the rest of the form is accessible.** Once the Main page is successfully saved, the form will automatically advance to the next navigational page, and all other pages can be accessed.

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## Customer Information Heading

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**Introduction** The customer heading displays basic information regarding the customer status and organization associations in KAMIS.

Click on the 'More Person Info...' link to view the current demographic information of the customer.

KAMIS ID: 821309	Name: SMURF, YOUNG	Customer Status: ACTIVE	<a href="#">More Person Info...</a>
Orgs: Primary:	BERT NASH CMHC, INC	No Secondary	
MCO Org:	AMERIGROUP - MCO		

KAMIS ID: 821309	Name: SMURF, YOUNG	Customer Status: ACTIVE	<a href="#">More Person Info...</a>				
DOB	03/08/2008	Gender	MALE	SSN	999-03-2008	Medicaid Nbr	99903082008
Address	1234 SMURF ST TOPEKA, KS 66614-		County	SHAWNEE	Location	URBAN	
Home Phone		Work Phone		Cell Phone			
Ethnicity	NOT HISPANIC OR LATINO		Race	WHITE NON-HISPANIC			
Preferred Name		Effective Date	01/01/2021				
Orgs: Primary:	BERT NASH CMHC, INC	No Secondary					
MCO Org:	AMERIGROUP - MCO						

## Main Information Navigation Tab

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**Prerequisite** Add or update all customer and associate information before beginning the assessment data entry. Refer to the 'Person Administration Requirements' section at the beginning of this chapter for required Person Admin fields.

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**Tip** These instructions, with the exception of the information that references the Subscale Scores page, applies to both the Initial Assessment and the Annual Reassessment form. The Subscale Scores page only appears in the Initial Assessment.

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**Important** The Main navigational page must be saved before advancing to Subscale Scores. Once the save is successful the assessment will automatically advance to the Subscale Scores page.

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### Main Information Page

*Auto populated when form is saved*

KAMIS ID: 821309 Name: SMURF, YOUNG Customer Status: ACTIVE [More Person Info...](#)  
Orgs: Primary: BERT NASH CMHC, INC No Secondary

SED Initial Assessment  
Assessment Nbr:

Main Information | Subscale Scores  
Main

Assessment Information

- \* Organization: 4465 - BERT NASH CMHC, INC
- \* Form Status: WORK IN PROGRESS
- \* Assessment Date:
- \* Reassessment Due Date: 99903082008

Medicaid Card ID Number: 99903082008  
Converted Assessment: N

Cancel Create

Added By: on

SED Services History Prior to 07-1-2015  
SED Crisis Services History Prior to 07-1-2015

User Documentation

- KAMIS User Manuals
- SED Changes Due to Migration - 7/01/2015
- KAMIS SED Frequently Asked Questions - 7/07/2015

**Required Fields** All fields tagged with a red asterisk (\*) are required.

If the client has a Medicaid card ID number, it should be entered.

Note: The Reassessment Due Date field is auto populated when the assessment is saved by clicking on the **Create** button.

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**Form Status** The Form Status starts in Work in Progress status and if changed before the Main page is filled out and created, will cause an error when the Main page is saved for the first time.

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## Main Information Navigation Tab – File Upload

### Introduction

Once the form is created by saving the Main Information page, an additional region displays, containing the Document File Upload utility. Use this region to upload documents associated with the SED Assessment.

**Document File Upload**

ⓘ If you previously uploaded documents relevant to this assessment in a different upload file location, such as the SA Document File Upload region on the decommissioned Service Authorization form, or the View/Attach File(s) link on the Person Admin page, please re-upload them here.

**To Attach / Upload File:**

<p><b>Steps to Upload a File:</b></p> <ol style="list-style-type: none"> <li>1. Click on the "Choose File..." button.</li> <li>2. Browse to the file location.</li> <li>3. Click on the file and then the "Open" button.</li> <li>4. Enter an optional description of the file in the Description field.</li> <li>5. Click the "Upload" button.</li> </ol>	<p><b>To Delete a File:</b></p> <p>Click on the trash can next to the file to be deleted in the <i>Uploaded Files</i> section.</p> <p>Note: Only the person who uploaded the file can delete the file.</p>
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No file chosen

Description (Optional)

[Uploaded Files](#)

### Upload a File to the Assessment


Follow the steps in the table below to attach a file to the SED Assessment using the Document File Upload tool.

Step	Action	Result
1.	Click on the <b>Choose File...</b> button. (Some browsers label the button "Browse..." instead of Choose File)	A dialog box to choose the file displays.
2.	Navigate to the location on your local computer or agency network where the file is located.	The desired file name appears in the file list window.
3.	Click on the file you want to upload.	The file is highlighted.
4.	Click on the Open button.	The file name appears next to the Choose File button.
5.	Enter a short descriptive name in the <b>Description (Optional)</b> field if desired.	This is not a required field. Useful if the original filename is not descriptive enough to identify what the file contains.
6.	Click on the <b>Upload</b> button	The source file is uploaded to a secure KDADS file server, and is attached to the SED Assessment. A link to the uploaded file displays in a table in the 'Uploaded Files' region below the Document File Upload tool.
7.	Repeat these steps for any additional files that need to be uploaded .	

## Main Information Navigation Tab – File Upload, continued

### View an Attached File

After you have attached a file to a form, you can view it to confirm it uploaded successfully and is accessible.


Uploaded Files				
Delete	Filename	Description	Add Date	File Size (bytes)
	Test_SED.docx	ROI dated 3-1-2021	03/10/2021 13:27:54	12,125
				1 - 1

Step	Action	Result
1.	To view an uploaded file, click on the file name link in the Uploaded Files table.	The file may open automatically, or you may be prompted to open it.  Depending on your browser settings and the type of file that was uploaded, the file will open in a browser window/tab, or in the file's source application.
2.	After viewing the attachment, close the window/tab or the source application.	The Document File Upload region redisplay.

### Delete an Attached File

If you discover you uploaded the wrong file, or you decide you no longer need the file attached to the assessment, you can delete it. Deleting the attachment only deletes the file from the Assessment. The original source file located on your computer/network is not affected.

**NOTE:** Only the user that uploaded the file can delete the file. If the Delete icon (trash can) does not appear next to an uploaded file, it indicates you did not upload that file, and you cannot delete it.

Uploaded Files				
Delete	Filename	Description	Add Date	File Size (bytes)
	Test_SED.docx	ROI dated 3-1-2021	03/10/2021 13:27:54	12,125
				1 - 1

Step	Action	Result
1.	Click the <b>Delete icon</b> in the Uploaded Files table.	A confirmation message displays asking if you want to delete the file.
2.	Click on the <b>OK</b> button.	The attached file is deleted from the form and the entry is removed from the Uploaded Files table.

## Subscale Scores Navigation Tab

### Form Reference

Page 2a of the SED Initial Assessment form. This page is not in the Annual Reassessment form.

### Subscale Scores – CAFAS/CBCL Page

KAMIS ID: 821309 Name: SMURF, YOUNG Customer Status: ACTIVE [More Person Info...](#)  
Orgs: Primary: BERT NASH CMHC, INC No Secondary

SED Initial Assessment  
Assessment Nbr: 1757684

Main Information Subscale Scores

CAFAS Assessment - Subscale Scores

\* CAFAS Assessment Date:

\* School/Work Role Performance Score:  30  20  10  0

\* Home Subscale Role Performance:  30  20  10  0

\* Community Subscale Role Performance:  30  20  10  0

\* Behavior Toward Others:  30  20  10  0

\* Moods/Emotions Subscale:  30  20  10  0

\* Self-Harm Behavior Subscale:  30  20  10  0

\* Substance Use:  30  20  10  0

\* Thinking:  30  20  10  0

Total of Subscale Scores:

CBCL Assessment - Subscale Scores

\* CBCL Assessment Date:  Score Exception Approved?

T-Scores (2 digits or Check Not Computed)

\* T-Score on Total Problem Scale:  T-Score Total Problem Scale Not Computed:

\* T-Score on Internalizing Scale:  T-Score Internalizing Scale Not Computed:

\* T-Score on Externalizing Scale:  T-Score Externalizing Scale Not Computed:

Apply Changes

### Required Fields

All fields displayed on this page are required in order to save the page.

### Tip

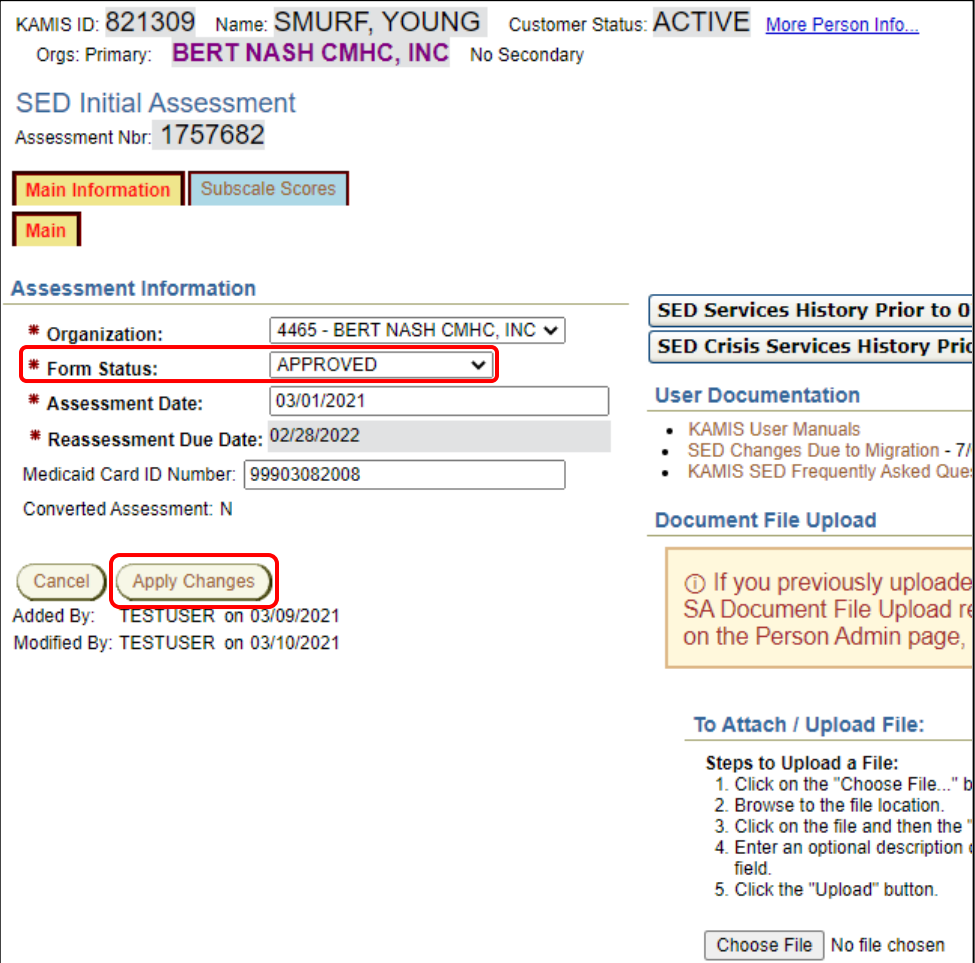
Once the page is saved, the page will automatically forward to the Main Information navigation tab so that the form status can be changed from Work in Progress to Approved.



# Approve (Complete) the Form

**Requirement** When the data entry of the SED Assessment form within KAMIS is completed, the form can be saved in “Approved” status. Once the form is saved in Approved status all fields will change to read only.

**How To** Follow the steps in the table below to complete the data entry process.

Step	Action	Result
1.	In the Form Status field, select “Approved”.	
	 <p>KAMIS ID: 821309 Name: SMURF, YOUNG Customer Status: ACTIVE <a href="#">More Person Info...</a>          Orgs: Primary: <b>BERT NASH CMHC, INC</b> No Secondary</p> <p><b>SED Initial Assessment</b>          Assessment Nbr: 1757682</p> <p><b>Main Information</b>   <b>Subscale Scores</b></p> <p><b>Main</b></p> <p><b>Assessment Information</b></p> <p>* Organization: 4465 - BERT NASH CMHC, INC ▼          * <b>Form Status:</b> <b>APPROVED</b> ▼          * Assessment Date: 03/01/2021          * Reassessment Due Date: 02/28/2022          Medicaid Card ID Number: 99903082008          Converted Assessment: N</p> <p><input type="button" value="Cancel"/> <input type="button" value="Apply Changes"/></p> <p>Added By: TESTUSER on 03/09/2021          Modified By: TESTUSER on 03/10/2021</p> <p><b>SED Services History Prior to 0</b>  <b>SED Crisis Services History Pri</b></p> <p><b>User Documentation</b></p> <ul style="list-style-type: none"> <li>• KAMIS User Manuals</li> <li>• SED Changes Due to Migration - 7/</li> <li>• KAMIS SED Frequently Asked Que</li> </ul> <p><b>Document File Upload</b></p> <p>ⓘ If you previously uploaded SA Document File Upload re on the Person Admin page,</p> <p><b>To Attach / Upload File:</b></p> <p><b>Steps to Upload a File:</b></p> <ol style="list-style-type: none"> <li>1. Click on the "Choose File..." b</li> <li>2. Browse to the file location.</li> <li>3. Click on the file and then the "</li> <li>4. Enter an optional description o field.</li> <li>5. Click the "Upload" button.</li> </ol> <p><input type="button" value="Choose File"/> No file chosen</p>	
2.	Click the <b>Apply Changes</b> button.	All validations are double-checked, both in Person Administration and within the Assessment.

*Continued on next page*

## Approve (Complete) the Form, continued

### How To

*Continued*

Step	Action	Result
3.	If a required field has not been completed, errors will display on the page.	
4.	The error listing will identify the missing fields, and their location.	Example below
	<div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> <p style="text-align: center; margin: 0;"><b>1 error has occurred</b></p> <ul style="list-style-type: none"> <li>• Customer is missing a current residential address. Please update the Person Admin page, then return to save this form as "Approved".</li> </ul> </div>	
5.	Navigate to the field and enter or correct the data.	Remember to save any pages that are updated.
6.	Once all the errors have been corrected, navigate back to the SED Assessment Main Information navigation tab.	
7.	In the Form Status field, select "Approved".	
8.	Click on <b>Apply Changes</b> .	The validations check will occur again.
9.	If there are no errors, the form will be saved as Approved and the form will be read only.	
<p><b>NOTE:</b> Files can still be uploaded to an assessment after it has been saved in Approved status.</p>		