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1. Introduction

The Data Submission System (DSS) is a new data preparation and submission system that was developed in cooperation with SAMHSA and state representatives to replace the recently retired State Treatment Episode Data Set (TEDS) Submission System (STSS).\(^1\)

1.1 Purpose of the DSS

The DSS is designed to provide a more interactive and transparent data submission process by minimizing the burden of U.S. states and territories when reporting substance abuse and mental health data to TEDS. With the DSS, U.S. states and territories can use many different file formats to create a file extract of their existing database or databases. In addition to the TEDS ASCII fixed-width file format, which was supported by STSS, the DSS also accepts non-fixed width file formats, such as Excel and Comma Separated Values (CSV). The use of different file formats allows states and territories to tailor their TEDS file submissions to include only the variables that they collect.

Additionally, the DSS allows U.S. states and territories to visualize their data through graphics, review simplified edit reports, and apply corrective actions prior to file submission. These functions, along with the overall intuitive design of the DSS, provide U.S. states and territories easier access to, and the means to comply with, TEDS reporting requirements.

1.2 Document Scope

This document explains how to use the DSS application to properly submit substance abuse (admission and discharge) and mental health (admission, discharge, and update) files to TEDS.

1.3 Disclaimer

This manual is an instructional tool for the DSS; it does not provide definitions of data fields or explain TEDS reporting requirements. Please refer to the Combined Substance Abuse and Mental Health TEDS State Instruction Manual for reporting guidelines.

The functionality available depends upon permissions granted to each state user. If you have any questions, please contact the BHSIS Project Office through the Support page (Section 13, Support Page) or at BHSIS_Helpdesk@eagletechva.com.

Files submitted prior to June 1, 2017, are included in the list on the Submissions page. Submission details are available; however, the data, validation results, and summary and error reports currently cannot be viewed.

\(^1\) As of June 1, 2017, the STSS is no longer supported. All states and territories are required to use the DSS to submit substance abuse and mental health TEDS data.
2. Quick Guide for TEDS Data File Submission

The following steps provide a quick user guide for submitting a TEDS data file through the DSS. Please refer to each section of this manual for step-by-step instructions.

**Note:** Steps 3 and 4 are applicable only if you are submitting non-TEDS formatted files. If you are submitting a TEDS fixed-width format file, skip steps 3 and 4.

1. Access and log on to the DSS (see Section 3).
2. Upload a data file to the DSS (see Section 4.2).
3. If your data file is not in TEDS format, complete a Data Conversion Crosswalk (see Section 5).
4. Convert the data file to TEDS format by using a completed crosswalk (see Section 6).
5. Validate your data file using the **Run Validations** feature (see Section 7).
6. Review **Validation Results, Summary**, and **Error Reports** (see Section 8).
7. Correct data errors by using the **Edit feature**; then re-validate the data file (see Section 9).
8. Submit the data file to the BHSIS Project Office for final processing (see Section 10).
9. Access TEDS data files that have been processed by the BHSIS Project Office (see Section 11).

**Figure 2-1** provides a process flow for submitting a TEDS data file via the DSS.

![Data Submission Process Flow](image-url)
3. Accessing and Logging into the DSS

3.1 User ID and Password

Contact the BHSIS Project Office at BHSIS_Helpdesk@eagletechva.com to obtain a user ID and password.

Use the steps below to access and log in to the DSS.

2. Enter your user ID and password in the User ID and the Password fields; then click Submit.

Note: If you forgot your User ID or Password, click on the Forgot User ID? or Forgot Password? link located to the right of the Submit button.

3.2 Two-Factor Authentication

Once you have logged in, the Two-Factor Authentication page appears. This page is designed to provide an additional layer of security to the DSS application system.

A verification code is sent to the email address that we have on file. Please have your email account accessible when using the DSS.

The verification code expires within 3 minutes. You may select the Yes, register my computer option if you would like to register your computer. By selecting this option, you are not required to enter a verification code the next time you log in using the same computer and browser within a 30-day period.
**Note:** If you clear your browsing history, you are required to enter a new verification code the next time you attempt to log in to the DSS.

![Two-Factor Authentication Page](image)

*Figure 3-2. Two-Factor Authentication Page*

The system defaults to the **Files** page.

![Files Page](image)

*Figure 3-3. Files Page*

Use the navigation tabs (Files, Crosswalk, Submissions, Support, and Audit Trail) at the top of the page to access the desired functionality.
4. Managing Data Files in the File Repository

The File Repository is displayed on the Files tab. The repository is the basis for all actions in the DSS.

Once a data file is in the repository, you can view, query, and modify the data, as well as generate a data profile. You can download all, or subsets, of the data.

If your file is already in a TEDS format, you can run validations and then submit your data file for processing. Any file format beginning with teds_ is in the TEDS format and does not need to be converted.

If your data file is not in a TEDS format, you must use a completed Data Conversion Crosswalk to convert the data file to a TEDS format. After the file has been converted, you can run validations, and then submit your data file for processing. Please refer to Section 5, Completing a Data Conversion Crosswalk, and Section 6, Converting a File to the TEDS Format, for step-by-step instructions.

The File Repository contains files that the state user is testing and files that have been submitted to the BHSIS Project Office for processing. The following sections describe the functionality available on the Working Files and Submitted Files pages.

4.1 Working Files Page and Submitted Files Page Overview

All state data files that have been uploaded, converted, or validated are in the Working Files list on the Working Files page. They are presented in the order in which they were uploaded or created through data conversion. The most recent data files will be at the top of the list. These files will be in the list on the Working Files page until deleted or submitted to the BHSIS Project Office for processing.

All TEDS-formatted files that have been submitted for processing or have been processed by the BHSIS Project Office are available in the Submitted Files list on the Submitted Files page. They are presented in the order in which they were submitted. The most recent submissions will be at the top of the list.
Working Files Page and Submitted Files Page Description

The Working Files list on the Working Files page and the Submitted Files list on the Submitted Files page are similar.

The columns in the Working Files and Submitted Files lists are identical, except that the Submitted Files list has an additional column, Submissions. The status of the file depends on the processing stage and is unique to the Working Files or Submitted Files page.

A description of the columns on these pages and their contents is identified in Table 4-1.

<table>
<thead>
<tr>
<th>File Name</th>
<th>Name of the file</th>
</tr>
</thead>
<tbody>
<tr>
<td>Format</td>
<td>File structure and layout, e.g., CSV, Excel, fixed-width</td>
</tr>
<tr>
<td>Type</td>
<td>Specifies if the file contains Admission or Discharge data</td>
</tr>
<tr>
<td>Size</td>
<td>Size of the file in bytes</td>
</tr>
<tr>
<td>Initial Upload Date</td>
<td>First date that the file was uploaded</td>
</tr>
<tr>
<td>Last Upload Date</td>
<td>Last date that the file was uploaded after pausing or stopping an upload</td>
</tr>
</tbody>
</table>
| Status | **Working Files**

  * **Uploaded**: A file that has not been validated or converted
  * **TEDS Format File**: A TEDS Format data file that was created from a csv or excel file through the data conversion process, but has not yet been validated
**Converted to TEDS Format:** A csv or excel file that was uploaded to the DSS then was converted to a TEDS Format data file. This is the original file and cannot be validated.

**State Testing:** The State has run a trial validation on the file.

**Submitted Files**

- **Logged:** The file has been formally submitted by the state for final processing by the BHSIS Project Office.
- **Testing:** The BHSIS Project Office is reviewing and running validations on the submitted (logged) file.
- **Production:** The BHSIS Project Office has processed the file.

**Submissions**

- **Link to submission details for the file**

**Action**

- **Download**
- **Delete:** Working Files page only

### Table 4-1. Description of Working and Submitted Files Pages

<table>
<thead>
<tr>
<th>Function</th>
<th>Working Files</th>
<th>Submitted Files</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload Data File</td>
<td>Yes</td>
<td>No</td>
<td>Section 4.2</td>
</tr>
<tr>
<td>View File Details</td>
<td>Yes</td>
<td>Yes</td>
<td>Section 4.3</td>
</tr>
<tr>
<td>Convert to TEDS Format</td>
<td>Yes</td>
<td>No</td>
<td>Section 6</td>
</tr>
<tr>
<td>Generate Data Profile</td>
<td>Yes</td>
<td>Yes</td>
<td>Section 12</td>
</tr>
<tr>
<td>Download</td>
<td>Yes</td>
<td>Yes</td>
<td>Section 4.4</td>
</tr>
<tr>
<td>Delete</td>
<td>Yes</td>
<td>No</td>
<td>Section 4.5</td>
</tr>
<tr>
<td>Validate</td>
<td>Yes</td>
<td>No</td>
<td>Section 7</td>
</tr>
<tr>
<td>View Submission Details</td>
<td>No</td>
<td>Yes</td>
<td>Section 11</td>
</tr>
</tbody>
</table>

### 4.1.2 Working Files and Submitted Files Functionality

The functionality available on the **Working Files** and **Submitted Files** pages is similar, but there are very important differences. These differences are attributed to the processing stage of the file. Files can be uploaded only on the **Working Files** page. Files that have been submitted to the BHSIS Project Office for processing are on the **Submitted Files** page and cannot be modified, converted, validated, or deleted. Submission details can be viewed on the **Submitted Files** page only.

Table 4-2 identifies the basic functionality provided on each of these pages. It serves as a quick reference for directing you to the sections that provide more details and instructions for this functionality.

<table>
<thead>
<tr>
<th>Function</th>
<th>Working Files</th>
<th>Submitted Files</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload Data File</td>
<td>Yes</td>
<td>No</td>
<td>Section 4.2</td>
</tr>
<tr>
<td>View File Details</td>
<td>Yes</td>
<td>Yes</td>
<td>Section 4.3</td>
</tr>
<tr>
<td>Convert to TEDS Format</td>
<td>Yes</td>
<td>No</td>
<td>Section 6</td>
</tr>
<tr>
<td>Generate Data Profile</td>
<td>Yes</td>
<td>Yes</td>
<td>Section 12</td>
</tr>
<tr>
<td>Download</td>
<td>Yes</td>
<td>Yes</td>
<td>Section 4.4</td>
</tr>
<tr>
<td>Delete</td>
<td>Yes</td>
<td>No</td>
<td>Section 4.5</td>
</tr>
<tr>
<td>Validate</td>
<td>Yes</td>
<td>No</td>
<td>Section 7</td>
</tr>
<tr>
<td>View Submission Details</td>
<td>No</td>
<td>Yes</td>
<td>Section 11</td>
</tr>
</tbody>
</table>
4.2 Uploading a File

The **Working Files** page allows you to upload designated files only to the repository. If you have a file that you need for any process during the submission of your TEDS file, upload it here.

The following file formats can be uploaded in the DSS:

- CSV
- Excel
- TEDS Fixed Width Format (Please refer to Appendix A’s Admission and Discharge Records Structure and File Specifications.)
- TEDS Excel Format
- TEDS CSV Format
- SPSS (.sav)
- MS Access Database (.mdb)
- MS Access (.accde)
- Other

Files with the following file extensions can be uploaded in the DSS:

.accde, .asc, .bmp, .csv, .dat, .data, .doc, .docx, .gif, .jpeg, .mdb, .pdf, .png, .ppt, .pptx, .prn, .sav, .tiff, .txt, .xls, .xlsx

To upload a file to the repository, from the Files tab go to the Working Files page and follow the instructions below:

1. Click the **Upload File** button on the right side of the screen.

2. A **File Upload** disclosure pop-up box appears.

3. Click **OK**.

4. An **Upload File** pop-up box appears.
5. Click the **Drop File Here or Click to Browse** box; then browse the files and pick the file you wish to upload. Alternatively, you can drag and drop the file from your computer to the **Drop File Here or Click to Browse** box.

6. The **File Format** box will be populated with the format type of your file. Verify that the format of the file that you are attempting to upload matches the format in the **File Format** box. If the file extension does not match, use the **File Format** drop-down menu to select the correct format.

7. Use the **Submission Type** drop-down menu to select **Admission** or **Discharge** file. **Note:** If the file that you are uploading is not an **Admission** or **Discharge** file, select **Other**.

8. Enter a description in the **Description** text box, as applicable.

9. Click **OK** to upload the file.

10. A pop-up message stating that the file has been uploaded successfully appears.

11. Click **OK** to close the pop-up window.

12. Check the Working Files list to ensure that the status of the file appears as **Uploaded**.

   To pause or to stop the upload, click the **Pause** or the **Stop** button that appears at the top of the screen and to the right of the Upload Status bar. You can continue uploading the paused or stopped upload whenever you like, even if you log out and log back in.

**File Repository**

![Image of Upload Status Bar]

**Note:** You can upload two files with the same name in the DSS. The system creates separate entries for each uploaded file.

### 4.3 Viewing File Details

Information about a file, processing information, and the ability to work with a file are accessed via the file name in the Working Files list on the **Working Files** page or the Submitted Files list on the **Submitted**
Files page. Visible tabs and available functionality depend upon the format and status of the selected file.

To work with a file from the Working Files list or the Submitted Files list, click on the file name.

From the Working Files list only, you can select View Detail from the drop-down menu attached to the file name.

Note: The menu options will differ depending upon the file format.

The File Details page displays the records in the file.

![Figure 4-7. View Detail Option](image)

You can browse and query the data for all files that are on the Working Files and Submitted Files page.

You can edit all files that are on the Working Files page, except those where the Status is Converted to TEDS Format.
A description of the features on the Data page and instructions can be found in Section 9, Viewing and Correcting Data.

If a data profile has been generated, the Data Profile tab is visible. Information about data profiles can be found in Section 12, Generating a Data Profile for a TEDS-Formatted File.

The Validation Results, Summary Report, and Error Report tabs are visible for all TEDS-formatted files after running validations. When the file has not been validated, the Status remains as Uploaded. If you click on any of these tabs when the file has not been validated, the following message is displayed:

“Validations have not yet been run. Please click 'Run Validations' at the top right of the page.”

If the file has been validated, the pertinent information and appropriate functionality will be available under each tab. You cannot validate a file that is on the Submitted Files page.

Information about the Validation Results page can be found in Section 8.1, Viewing Validation Results.

Information about the Summary Report page can be found in Section 8.2, Summary Report.

Information about the Error Report page can be found in Section 8.3, Error Report.

4.4 Downloading a File

A file can be downloaded from the repository to your computer from the Working Files page or the Submitted Files page.

1. Click the Download icon under the Action column. A system pop-up prompts you to open or save the file.
2. Select Open or Save the file; then click OK.
4.5 Deleting a File

A file can be deleted from the repository to your computer from the Working Files page only.

1. Click the Delete icon in the Action column. The system displays a pop-up box asking if you want to delete the file.

2. Click Yes on the pop-up box. The system removes the file from the repository.

Note: If you mistakenly delete a file, you must send an email to the BHSIS Project Office (BHSIS_Helpdesk@eagletechva.com) to request that the file be re-uploaded to the repository.
5. Completing a Data Conversion Crosswalk

A non-fixed width format file cannot be validated until it has been converted to the TEDS Format. Conversion is accomplished using a completed **Data Conversion Crosswalk**. Step-by-step instructions for creating, modifying, viewing, and printing a Data Conversion Crosswalk are provided in the following sections.

### 5.1 Overview

The **Data Conversion Crosswalk** page contains a list of Data Conversion Crosswalks and pertinent crosswalk details: the crosswalk name, the uploaded file that was used to create the crosswalk, whether the crosswalk is the default crosswalk, the submission type, the date the crosswalk was created, the date the crosswalk was modified, and the status of the crosswalk. The page provides buttons that allow you to easily create a new crosswalk and modify, view, set as default, and delete an existing crosswalk. Most columns in the table can be sorted, and the standard navigation tools are provided.

![Crosswalk Page](image)

Prior to beginning the process of creating a completed Data Conversion Crosswalk, upload a non-fixed width format file that contains your state codes or ensure that an existing non-fixed width format file that was previously uploaded is in the File Repository on the **Working Files** page.

After creating the Data Conversion Crosswalk, you need to map the **State fields** to the corresponding **TEDS fields** and map the **State Codes** in certain fields to the corresponding **TEDS codes** within those fields. Details about the required mapping of State fields and codes to TEDS fields and codes, as well as the various mapping types that simplify the process, are provided in **Section 5.3, Mapping the State Field to the TEDS Field**, and **Section 5.4, Mapping State Codes to TEDS Codes**.
After mapping State fields and codes to TEDS fields and codes, you will need to verify that crosswalk mapping is complete. This is described in Section 5.5, Verifying Crosswalk Mapping. If the crosswalk mapping verification is successful, you will need to mark the crosswalk as complete, which is described in Section 5.6, Marking a Data Conversion Crosswalk as Complete. After finishing these steps, the crosswalk can be used for data conversion. Data Conversion is described in Section 6, Converting a File to the TEDS Format.

5.2 Creating the Data Conversion Crosswalk

To create a Data Conversion Crosswalk, ensure that you are on the Data Conversion Crosswalk page. Perform the following steps:

1. Click the Create Data Conversion Crosswalk button in the upper right corner on the Data Conversion Crosswalk page.

The Create Crosswalk page is displayed.

2. Enter the crosswalk name in the Crosswalk Name text box; then select the applicable Submission Type by clicking the Admission File or the Discharge File radio button.

3. Click the Pick from Existing Files button.

The Pick from Repository pop-up box is displayed.
4. Select a file by clicking the radio button next to the file name; then click OK. The popup is removed and the selected file name is displayed.
5. Click the Next button. The Edit Crosswalk page is displayed.

The crosswalk name, submission type, created date, default status, crosswalk status, legacy crosswalk use, and source for the State fields are displayed on the Edit Crosswalk page. Status is Incomplete. By default, the Legacy Crosswalk Reference is Yes.

The Fields to be Mapped list and Mapped Fields table are required for crosswalk creation and are discussed in the sections below. The Mapped Fields table is empty initially, but is populated as the state fields are mapped to the TEDS fields. Proceed to Section 5.3, Mapping State Fields to TEDS Fields, to continue the crosswalk creation process. The remaining steps required to complete a crosswalk are described in subsequent sections.
5.3 Mapping State Fields to TEDS Fields

The Edit Crosswalk page contains a one-to-one (or a one-to-many) mapping of state data fields and codes to the TEDS data fields and codes.

The State Field and TEDS Field columns are listed in the Fields to be Mapped box. Unmapped fields are yellow. As they are mapped, the color changes to blue and the mapped fields are displayed in the Mapped Fields table.

There are eight (8) required fields for an Admission file, and nine (9) required fields for a Discharge file. These required fields need to be mapped for the crosswalk to be complete. These required fields are highlighted in orange until they are mapped. A crosswalk cannot be set as Complete until all codes within the required fields have been mapped. Figure 5-6 shows the initial Edit Crosswalk page for an Admission file and Figure 5-7 shows the initial Edit Crosswalk page for a Discharge file.

![Figure 5-6. Edit Crosswalk Page for Admission File before Field Mapping]
Follow the steps below to map the State fields to the TEDS fields.

1. Ensure that the state fields appear in the State Field column under the Fields to be Mapped heading.
2. Draw a line from an item in the State Field column to an item in the TEDS Field column by using your mouse to click and drag a line from the State Field item to the corresponding TEDS Field item; then, release the mouse button to paste the line. Repeat this step for all fields.
Notes:

- After the first field is mapped, the Save button is available in the upper right corner of the Edit Crosswalk page. Click on it frequently.
- The DSS fills in the State Code field automatically; therefore, you do not need to map it to a TEDS Field item.
- If you accidentally map a State Field to the wrong TEDS Field or vice versa, click the X button that appears to the right of the row in the Mapped Fields table. The row with the incorrect mapping is removed from the Mapped Fields list.

3. Use the pagination tools in the State Field column and TEDS Field column to display fields that are not visible on this page.

In the Mapped Fields table, a Yellow Triangle is displayed to the left of the fields that need further action. You must click the Edit icon on the right side of the row for each incomplete field. There are four different Mapping Types. Each serves a different purpose when converting a file. The code mapping requirements will be different for each one. Please see Section 5.4, Mapping State Codes to TEDS Codes, for detailed instructions about mapping State codes to TEDS codes.
5.4 Mapping State Codes to TEDS Codes

Each field has a Mapping Type that is displayed in the Mapped Fields list between the State Field and the TEDS Field. The Mapping Type tells the conversion process how to convert the State codes in the original file to the TEDS codes in the new TEDS Format file.

Note: DSS Validation is performed on the newly created TEDS Format file.

The four different Mapping Types are Direct Copy, Date Format, Code Value Mapping, and Static Input.

- Direct Copy is represented by a C in the Mapping Type column.
- Date Format is represented by a D in the Mapping Type column.
- Code Value Mapping is represented by a V in the Mapping Type column.
- Static Input is represented by an I in the Mapping Type column.

If needed, the Mapping Type for any field can be changed from its default by clicking on the letter representation for the Mapping Type for that field. Follow the steps below to change the Mapping Type.

1. Click the Mapping Type for a field.

   Figure 5-11. Mapping Type

   The Select Mapping Type pop-up window is displayed.

   Figure 5-12. Mapping Type Pop-Up Box

2. Click the radio button next to the desired Mapping Type; then click OK.
   The Mapping Type is changed.
When code mapping needs to be performed, a **Yellow Triangle** icon is displayed to the left of each field where the Mapping Type is **Code Value Mapping** or **Date Format**. After code mapping has been completed for these fields, the **Yellow Triangle** icon disappears.

*Sections 5.4.1 through 5.4.4* explain the purpose of each of these Mapping Types and describes the steps required to map the **State** codes to the **TEDS** codes for each Mapping Type.

To complete the code mapping:

1. Click the **Edit** icon on the right side of the row for each incomplete field, and follow the instructions below for that Mapping Type.

   For example, in Figure 5-14, the **Reporting Date**, **Codependent/Collateral**, and **Client Transaction Type** fields require code mapping. The Mapping Type for **Reporting Date** is **Date Format** (D) and the Mapping Type for **Codependent/Collateral** and **Client Transaction Type** is **Code Value Mapping** (V). Refer to *Sections 5.4.2* for Date Format Mapping Type and *5.4.3* for Code Value Mapping Type.

2. After code mapping has been completed, proceed to *Section 5.5, Verifying Crosswalk Mapping*, to verify that all code mapping for the **Data Conversion Crosswalk** is complete, then continue the crosswalk creation process.

### 5.4.1 Mapping Codes for Direct Copy (C) Mapping Type Fields

Direct Copy mapping means that during data conversion, the system copies the data for that field from the state data file directly to the newly created TEDS Format data file without transforming the data.

If the **Mapping Type** for a field in the **Mapped Fields** list is **C**, Direct Copy, no action is required. A Yellow Triangle is not displayed for this Mapping Type.
5.4.2 Mapping Codes for Date Format (D) Mapping Type Fields

Date Format mapping means that, during data conversion, the system uses the date format specified in the Data Conversion Crosswalk to change the date format in the state data file to the required TEDS date format.

To complete code mapping, you need to edit this field and provide the date format that is in the state data file.

1. Click the **Edit** icon in the row where the Mapping Type is **D**.

   The **Date Format Selection** pop-up box appears. The **First few Values** box displays the state’s data from a few records for this field. In the example image below, **cd_date_admission** data is displayed.

   ![Figure 5-15. Date Format Selection Pop-Up Box](image)

2. Select the radio button that matches the state’s date format.

   If your state’s date format is not listed, click the **Other** radio button, and type the date format in the text box.

   ![Figure 5-16. Selecting Other on the Date Format Selection Pop-Up Box](image)
**Note:** The table below identifies the most common letters identifying date formats:

<table>
<thead>
<tr>
<th>Letter</th>
<th>Date or Time Component</th>
<th>Format Example</th>
<th>Output example</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Month in Year</td>
<td>MMM MM</td>
<td>Jul 07, 10</td>
</tr>
<tr>
<td>d</td>
<td>Day in Month</td>
<td>dd</td>
<td>03, 11</td>
</tr>
<tr>
<td>y</td>
<td>Year</td>
<td>yyyy yy</td>
<td>2016 16</td>
</tr>
</tbody>
</table>

*Table 4-3. Date formats*

3. Click **OK**.
4. Repeat steps 1–3 for all remaining fields in which the Mapping Type is Date Format (D).

**5.4.3 Mapping Codes for Code Value Mapping (V) Mapping Type Fields**

Code Value mapping means that during data conversion, the system reads the State code for this field in each record and uses the crosswalk to match it to the TEDS code. The TEDS code is written in the newly created TEDS Format file.

To complete code mapping, you need to edit this field in the crosswalk and match all State codes in the State data file for this field to the corresponding required TEDS code.

You can either use a Legacy Crosswalk to automatically enter the State data codes or you can manually enter the State data codes for this field and match them to the correct TEDS code.

**Note:** A Legacy Crosswalk is a state data crosswalk that has been approved by the BHSIS Project Office and is stored in the DSS crosswalk database. The Legacy Crosswalk can be viewed from the Edit Crosswalk page to assist you in filling your Data Conversion Crosswalk’s state code fields marked Value Mapping (V). Please refer to the *Combined Substance Abuse and Mental Health TEDS State Instruction Manual* for more information about state data crosswalks (Legacy Crosswalk).

**5.4.3.1 Using a Legacy Crosswalk for Code Value Mapping Type Fields**

When a Data Conversion Crosswalk is created, the Crosswalk Legacy Reference is set to **YES**. If your state has more than one Legacy Crosswalk, the first one will be selected. You can select a different Legacy Crosswalk as follows:

1. Click on the **Edit icon** to the right of the crosswalk name. The Edit Crosswalk pop-up box is displayed.
2. Select a Legacy Crosswalk from the drop-down menu, then click the **OK** button.
To enter the state data automatically using the **Legacy Crosswalk**, use the following steps:

1. Click the **Edit** icon in the row where the Mapping Type is **V**.

   The **Value Mapping** pop-up and **Legacy Crosswalk** pop-up boxes are displayed. The **Employment Status** field is used in the example in Figure 5-18.

2. Click the **Green Arrow** icon ( ) in the upper right corner of the **Legacy Crosswalk** pop-up box. The State codes and descriptions are mapped appropriately on the **Value Mapping** table.
3. Click **OK**.
4. Click the plus symbol (⁺) to the left of the field to expand the row to display the code mapping for the field.

![Figure 5-19. Mapped Legacy Crosswalk Pop-Up Box](image)

5.4.3.2 Code Value Mapping Without a Legacy Crosswalk

If you want to enter the State data codes manually, you will need to set the **Legacy Crosswalk Reference** to **NO**.

1. Click on the **Edit icon** to the right of the crosswalk name. The Edit Crosswalk pop-up box is displayed.

![Figure 5-20. Mapped Codes from Legacy Crosswalk](image)
To enter the State data codes manually, use the following steps:

1. Click the **Edit** icon in the row where the Mapping Type **V** is displayed.

   The **Value Mapping** pop-up is displayed. The image below shows the **Employment Status** field.

   ![Value Mapping Pop-Up Box for Field: Employment Status](image)

   **Figure 5-22. Value Mapping Pop-Up Box for Field: Employment Status**

2. Type the State codes and descriptions in the **STATE Value** column.
3. Click **OK**.
4. Click the plus symbol (+) to the left of the field to expand the row to display the code mapping for the field.

5. Repeat steps 1–4 for all remaining fields in which the Mapping Type is Code Value Mapping (V).

### 5.4.4 Mapping Codes for Static Input (I) Mapping Type Fields

Static Input mapping means that during data conversion, the system changes the code in a state data field to the one specified in the crosswalk. It uses that specified code for that field in all records in the newly created TEDS Format file.

If the Mapping Type is **Static Input (I)**, a text box appears in place of the **State Field** name.

1. Click the letter between the **State** field and the **TEDS** field. A pop-up displays.
2. Choose the radio button next to Static Input, and click OK.
3. A text box is displayed in place of the state field name.

4. Enter the text in the Static Input text box that you want to appear for all codes for this field in all records.
5. Repeat this step for all remaining fields in which the Mapping Type is Static Input (I).

5.5 Verifying Crosswalk Mapping

⚠️ Click on the Verify Mapping button only if all required fields (eight for an Admission file and nine for a Discharge file) and all other applicable fields have been mapped. The crosswalk will not pass verification if the crosswalk has not been properly mapped. All required code mapping must be complete. Yellow triangles should not be displayed.

1. Click the Save button. Once all changes have been saved, the Save button disappears.
2. Click the Verify Mapping button that is in the upper left corner of the Edit Crosswalk page.
3. The **Verify Mapping** confirmation pop-up box appears.

![Verify Mapping](image)

**Figure 5-27. Verify Mapping Button**

4. If verification is **not** successful, a pop-up message identifies the problems. Correct the crosswalk, and repeat Steps 1 and 2.

   If required fields have not been mapped, the pop-up identifies the fields that need to be mapped. See Figure 5-29.

![Verify Mapping](image)

**Figure 5-28. Verify Mapping: Success**

![Verify Mapping](image)

**Figure 5-29. Verify Mapping: Required Fields Not Mapped**

If codes have not been mapped or date formats have not been selected, the pop-up identifies the fields that need code mapping and date format selection. See Figure 5-30.
5. Save your crosswalk by clicking the **Save** button, located at the right corner of the screen.

6. When the crosswalk is complete, go to the next section (**Section 5.6, Marking a Data Conversion Crosswalk as Complete**).

### 5.6 Marking a Data Conversion Crosswalk as Complete

Use the following steps to mark your Data Conversion Crosswalk as Complete only if your crosswalk has passed verification:

1. Click the **Save** button; then click **OK** on the **Crosswalk – Saved** pop-up message.

2. Mark your crosswalk as Complete by clicking the **Mark as Complete** button.
The crosswalk can be used to convert files to the TEDS format, which is described in Section 6, Convert a File to the TEDS Format.

5.7 Editing a Data Conversion Crosswalk
If you need to edit a data conversion crosswalk, perform the following steps:

1. On the Data Conversion Crosswalk page, click the Edit icon in the Actions column.

Note: If you click the crosswalk name, you will be able to view, but not edit, the crosswalk.

2. When the crosswalk appears, make the necessary edits; then click the Save button.

3. Click the Verify Mapping button to verify that mapping is complete.

Note: If the crosswalk mapping was previously verified or the Status was Complete, you need to verify mapping again (see Section 5.5, Verifying Crosswalk Mapping) then mark the crosswalk as Complete (see Section 5.6, Marking a Data Conversion Crosswalk as Complete).

5.8 Setting a Data Conversion Crosswalk as the Default
A Data Conversion Crosswalk for each submission type (Admission/Discharge) can be designated to be the default crosswalk for future data conversion.

On the Data Conversion Crosswalk page, the Set as Default button is displayed in the Actions column when the Status of the crosswalk is Completed. Click the Set as Default button.
If you do not want a default crosswalk, you can remove the default setting from the crosswalk as follows:

1. On the Data Conversion Crosswalk page, click on the Edit Crosswalk icon. The Edit Crosswalk page is displayed.

2. Click on the Edit icon to the right of the crosswalk name.

3. Click the NO radio button next to Set as Default, then click the OK button.
The crosswalk is no longer a Default crosswalk and the **Set as Default** button is displayed in the **Actions** column.

### Crosswalks

#### Data Conversion Crosswalk

![Figure 5-37. Default Crosswalk Setting Removed](image)

5.9 **Viewing a Data Conversion Crosswalk**

All Data Conversion Crosswalks can be viewed in read-only mode (to eliminate the risk of accidentally making changes) by clicking on the file name in the **Crosswalk Name** column. The **View Crosswalk** page is displayed.

All mapped codes can be displayed by clicking on the **Expand All** button or the **Print** button in the **Mapped Fields** table. Refer to Section 5.10, **Printing a Mapped Data Conversion Crosswalk**, for details and instructions about printing the crosswalk.

Mapped codes for individual fields can be displayed by clicking on the plus symbol (⁺) to the left of the **State Field** name in the **Mapped Fields** table.
When viewing a data conversion crosswalk, you cannot map fields, remove mapped fields, change the mapping type, edit mapped fields, or change the crosswalk name, the legacy crosswalk reference, or the default setting.

If you need to edit the crosswalk, click on the **Edit Crosswalk** button.

The **Edit Crosswalk** page will be displayed. Please refer to *Section 5.7, Editing a Data Conversion Crosswalk*.

### 5.10 Printing a Mapped Data Conversion Crosswalk

Follow the steps below to print a mapped data conversion crosswalk:

1. Click the **Print** button in the upper right corner of the **Mapped Fields** table.
A printable form of the **Mapped Fields** box that includes the mapped fields and the Mapping Type and mapped codes for each field is displayed.

2. Click the **Print** button in the upper right corner of the **Crosswalk Mappings** box.
5.11 Deleting a Data Conversion Crosswalk

A Data Conversion Crosswalk with the **Status** of **Incomplete** can be deleted. The **Delete Crosswalk** icon is displayed in the **Actions** column for incomplete Data Conversion Crosswalks. If the **Status** of a crosswalk is **Complete**, a **Delete Crosswalk** icon is **not** available.

If you need to delete an incomplete Data Conversion Crosswalk,

1. Click the **Delete File** icon.
   
   A pop-up box asking if you want to delete the crosswalk is displayed.
   
   ![Figure 5-43. Delete Crosswalk Pop-Up Box](image)

2. Click **Yes** on the pop-up box.
   
   The crosswalk is removed from the **Data Conversion Crosswalk** page.
6. Converting a File to the TEDS Format

⚠️ Before you can convert a file to the TEDS format, you must have a completed Data Conversion Crosswalk. Please refer to Section 5, Completing a Data Conversion Crosswalk, for detailed instructions.

Data conversion will be successful when all codes in all fields in the data file have been mapped. Error checking during the data conversion process will identify any codes that were not mapped in the Data Conversion Crosswalk.

6.1 Using a Data Conversion Crosswalk

To convert a file to the TEDS format, perform the following steps:

Click the triangle (More Actions) next to the file name; then select the Convert to TEDS Format option.

![Figure 6-1. Convert to TEDS Format Option](image)

1. If you have more than one completed crosswalk for a file, the system prompts you to select one. Use the Choose one drop-down menu to select the crosswalk; then click OK.

**Note:** You may save a completed crosswalk as the default crosswalk for future data conversion purposes. Please see Section 5.8, Setting a Data Conversion Crosswalk as the Default, for detailed instructions on how to set a completed crosswalk to be the default for data conversion purposes.

![Figure 6-2. Checking Crosswalk for TEDS Data Conversion Pop-up Box](image)

2. Click OK if the system displays a pop-up box indicating that the conversion was successful.
3. The status of the file will change to Converted to TEDS Format.
4. A new file is added to the repository. The name is a combination of the file name and the crosswalk name (filename_crosswalkname.csv). The status of this file will be TEDS Format File.
5. To continue the **Validation** process, see Section 7, *Running Validations on a TEDS-Formatted File*.

**Note:** If data conversion was not successful, a message will identify the codes that have not been mapped. See Section 6.2, *Data Conversion Error Checking* for more details.

### 6.2 Data Conversion Error Checking

Data Conversion error checking is an iterative process. Each time that you select **Convert to TEDS Format**, an error message will identify any code in any of the fields that was not mapped. You will have to either change the data in the file or update the data conversion crosswalk to include the unmapped code.

If data conversion (*Section 6.1, Using a Data Conversion Crosswalk*) was not successful, a message identifies the codes that weren’t mapped.

![Figure 6-3. TEDS Data Conversion Error Pop-Up Box](image)

1. Either correct the Data Conversion crosswalk to include the unmapped code (see Section 5.7, *Editing a Data Conversion Crosswalk*) or modify the data file to exclude the unmapped code (see Section 9.2.1, *Editing Data within the DSS*).
2. Repeat steps 1 and 2 in Section 6.1, *Using a Data Conversion Crosswalk*.
3. If conversion is successful, follow steps 3 through 6 in Section 6.1, Using a Data Conversion Crosswalk.

Note: If another code is found that has not been mapped, the error message that identifies the field, the mapped codes, and the unmapped code is displayed. These steps will need to be repeated until all codes have been mapped in the crosswalk or excluded from the data file.
7. Running Validations on a TEDS-Formatted File

⚠️ The Run Validations function is available only for a TEDS-formatted file. If the file is not in a TEDS format, refer to Section 5, Creating a Data Conversion Crosswalk, and Section 6, Converting a File to a TEDS Format.

By performing validations, you will be able to see all the errors and edits that you need to address before you submit the file for processing. You can start the validation process either by selecting Run Validations from the drop-down menu attached to the file on the Working Files page in the File Repository or by clicking on the Run Validations button on the File Details page.

1. In the **File Repository on the Working Files page**, select Run Validations from the drop-down menu attached to the file name.

![Figure 7-1. Run Validations from the File Repository Page](image)

2. A confirmation message informs that the validation has been completed, and directs the user to view the results on the Validation Results page.

3. Click the OK button.

![Figure 7-2. Validation Completion Confirmation Message from File Repository Page](image)

Alternatively:

1. On the **File Details** page, click the Run Validations button located at the top right corner of the page.
2. A confirmation message informs you that the validation has completed and you can view the results on the **Validation Results** page.

3. Click the **OK** button.

4. Click the **Validation Results** tab to review fatal, non-fatal, and informational errors. See Section 8.1, *Viewing Validation Results*, for further explanation of the **Validation Results** page.
8. Reviewing Validation Results and Error Reports

Each data field in each record is checked to ensure that it contains valid codes before the record is accepted and added to the TEDS database. These checks are called field edits. If an invalid code is found, the field is filled with a code indicating Invalid data, and a warning error is generated. You must apply corrective action to these records, as specified in the Error Report. Please refer to Section 8.3, Error Report.

All errors are displayed on the Validation Results page. There are three different types of errors: Fatal, Warning, and Informational. Below is a summary of the different types of errors.

<table>
<thead>
<tr>
<th>Error Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fatal</td>
<td>A <strong>fatal</strong> error causes a record to be rejected. The record will not be added to the database. The state is expected to review the specified edit violations, take necessary corrective action, and resubmit the corrected record(s) or file(s) for reprocessing. Generally, fatal errors are the result of missing or invalid code(s) in key data fields as well as the presence of duplicates.</td>
</tr>
<tr>
<td>Warning</td>
<td>A <strong>warning</strong> error is <strong>non-fatal</strong> and usually results from invalid code(s) in non-key data fields. The record will be processed and appended to the database, with the value of the data field replaced by the system-defined <strong>Invalid data code</strong> unless specified otherwise. The state is expected to review the specified edit violations, take necessary corrective action, and resubmit the corrected record(s) as replacements. Preferably, these warning errors are corrected by the state during the testing period and prior to submitting the file for final processing.</td>
</tr>
<tr>
<td>Informational</td>
<td>An <strong>informational</strong> message, considered a <strong>non-fatal error</strong>, is generated to inform the state that an edit was not performed due to missing data or that the edit did not produce the expected outcome. A common situation that generates an informational message is when a State Provider Identifier in a record cannot be found in the SAMHSA Inventory of Behavioral Health Services (I-BHS). The record will be processed and appended to the TEDS database. The state is expected to determine whether the facility is eligible for inclusion in the I-BHS. If the facility is eligible, a corrective action should be undertaken; if the facility is not eligible, the state may ignore the informational message.</td>
</tr>
</tbody>
</table>

*Table 4-4. Types of Errors*
The following sections describe how the validation results are displayed, how to select the errors in which you are interested, and how to download those results to an Excel or CSV file.

### 8.1 Viewing Validation Results

After running validations, errors might be present. The **Validation Results** page displays errors both graphically and in a table format. The page identifies field errors and the records in which they occurred.

Field edits, the corresponding error statement, and the recommended corrective action are displayed. The results are described in three different formats: a summary of validation results, a field name list with errors, and a bar chart.

Errors are color coded depending upon whether they are Fatal, Warning, or Informational errors.

In addition to the breakdown and identification of individual errors, the total number of errors and percentage of those that are fatal are displayed. Detailed descriptions about the errors are displayed when the mouse hovers over the edit numbers in the Field Name list. After clicking on the edit number, the records with those specific errors are displayed in a table.

The validation results can be downloaded to an Excel or CSV file. Three different sets of download buttons and a search tool allow you to select the records to be downloaded. Please see *Section 8.1.5, Download Validation Results*, for downloading instructions.

From the **Validation Results** page, the validated file can be submitted to the BHSIS Project Office for processing.

The **Validation Results** page can be accessed from the **File Details** page by clicking on the **Validation Results** tab.
Summary of Validation Results

This section displays a summary of the Validation Results. The following information is displayed: submission type, state code, reporting date, date received, status, total number of records, and number
of adds, changes, and deletes, both processed and accepted. Additionally, a gauge identifies the percentage and count of records with fatal errors.

All validation results can be downloaded to an Excel or CSV file by clicking on the XLS or CSV buttons located above the Validation Results Summary. See Section 8.1.5, Downloading Validation Results, for instructions.

![Figure 8-3. Validation Results Summary](image)

### 8.1.2 Field Name List With Errors

This section displays a list of fields (see Field Name column) and their corresponding edit numbers (See Edit # column) where records failed. More information about the error is displayed when you hover over the edit number.

![Figure 8-4. Field Name List with Errors](image)
Validation results can be displayed based on error type (Fatal, Warning, Informational) by selecting or unselecting the appropriate checkbox.

![Field Name List – Error Type Selection and Download](image)

**Table 8-5. Field Name List – Error Type Selection and Download**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Edit #</th>
<th># Records</th>
<th>Error Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>SysTranType</td>
<td>O1a</td>
<td>282,864</td>
<td>Fatal</td>
</tr>
<tr>
<td>SysTranType</td>
<td>O3a</td>
<td>190,471</td>
<td>Fatal</td>
</tr>
<tr>
<td>GlobalAssess</td>
<td>A7</td>
<td>272,250</td>
<td>Warning</td>
</tr>
<tr>
<td>DelNLF</td>
<td>A28</td>
<td>1,791</td>
<td>Warning</td>
</tr>
<tr>
<td>SMISEDStat</td>
<td>A62a</td>
<td>420</td>
<td>Warning</td>
</tr>
<tr>
<td>DateBirth</td>
<td>A19c</td>
<td>57</td>
<td>Warning</td>
</tr>
<tr>
<td>Education</td>
<td>A32b</td>
<td>18</td>
<td>Warning</td>
</tr>
<tr>
<td>Pregnant</td>
<td>A51</td>
<td>3</td>
<td>Warning</td>
</tr>
<tr>
<td>ProviderID</td>
<td>A67</td>
<td>142,161</td>
<td>Informational</td>
</tr>
<tr>
<td>SchoolAtndStat</td>
<td>A59</td>
<td>510</td>
<td>Informational</td>
</tr>
</tbody>
</table>

*Figure 8-5. Field Name List – Error Type Selection and Download*

**All validation results or the subsets selected by error type** can be downloaded to an Excel or CSV file by clicking on the **XLS** or **CSV** buttons to the right of the error type checkboxes. See **Section 8.1.5, Downloading Validation Results**, for instructions.

### 8.1.3 Bar Chart

This section of the **Validation Results** page displays the errors in a bar chart. Each bar on the graph represents an edit violation. The vertical axis displays the number of failing records; the horizontal axis displays the Edit Number.

![Errors Bar Chart](image)

*Figure 8-6. Errors Bar Chart*
8.1.4 Detailed Error Listings

To view a list of records with a specific edit violation, click the row in the field name list or the bar in the bar chart that corresponds to the edit number. The row and the bar will be highlighted. The list of records with that edit violation will be displayed in a table.

![Figure 8-7. Detailed Error Listings](image)

Each row in the table identifies the record number in the file and contains the data in that record. Use the horizontal scrollbar to look at the data in all fields. Use the navigation and pagination tools to view the records in the table. Use the search field to search for subsets of records. Only those records that match the search criteria will be displayed in the table.

The validation results displayed in the table can be downloaded to an Excel or CSV file by clicking on the XLS or CSV buttons above the table to the right. See Section 8.1.5, Downloading Validation Results, for instructions.

8.1.5 Downloading Validation Results

Validation results can be downloaded to an Excel or CSV file. There are three sets of download buttons.

To download all validation results, click the XLS or CSV button located above the Validation Results summary. See the image in Section 8.1.1, Summary of Validation Results. A popup box is displayed that identifies the records to be downloaded and allows you to include columns with the record and edit numbers in the downloaded file.
To download all validation results or a subset of validation results selected by error type, click the XLS or CSV button located to the right of the error type checkboxes. For more information and an image, see Section 8.1.2, Field Name List with Errors. A popup box is displayed that identifies the records to be downloaded and allows you to include columns with the record and edit numbers in the downloaded file.

To download the validation results displayed in the table, click the XLS or CSV button located above the table to the right. For more information and an image, see Section 8.1.4, Detailed Error Listings. A popup box is displayed that identifies the records to be downloaded and allows you to include columns with the record and edit numbers in the downloaded file.

3. Select the desired columns and click Confirm. A system pop-up prompts you to open or save the file.

4. Select Open or Save the file; then click OK. The Excel or CSV file containing the downloaded validation results is created.
Note: More than 65,535 records cannot be downloaded to an Excel file. The system will display the error in Figure 8-11. If an Excel file is required, download as CSV, then open the file in Excel.

**Figure 8-11. More than 65,535 Records in Excel File Message**

### 8.2 Summary Report

The **Summary Report** displays the following information for each System Transaction Type *(Add, Change, Delete)*:

1. The total number of records submitted, accepted, and rejected;
2. The number of records rejected with fatal errors; and
3. Other summary statistics, such as the number of records with non-fatal errors and the number of discharge records for which linked admission records were not found.

The **Summary Report** provides an overall evaluation of the quality of the data file. If a state’s data extraction program is working correctly, the number of errors in any file submission should be minimal. If a field has many errors, it usually indicates a systemic error that, once corrected, will resolve the errors for all or many of the records.

On the **File Details** page, click the **Summary Report** tab.
8.3 Error Report

For each record with errors, the Error Report details the edit number, record number, field name and erroneous value, key fields, a brief description of the error, and the required corrective action.

This report assists in the identification of non-systemic errors. A listing of individual records can be viewed to identify the cause of the errors. This may help you to resolve the errors. Examination of this report will enable states to resolve most errors. Please refer to the Combined Substance Abuse and Mental Health TEDS State Instruction Manual for a list of edits when reviewing this report.

On the File Details page, click the Error Report tab.
## Figure 8-13. Error Report

<table>
<thead>
<tr>
<th>RECORD NUMBER</th>
<th>SYSTEM TRACETYPE</th>
<th>PROVIDER ID</th>
<th>CLIENT ID</th>
<th>CO-DEP</th>
<th>CLIENT TRACETYPE</th>
<th>DATE OF ADMISSION</th>
<th>SERVICE CODE</th>
<th>FIELD NAME</th>
<th>STATE REPORTED VALUE</th>
<th>TYPE OF ERROR (FATAL/ERROR)</th>
<th>EDIT VIOLATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A</td>
<td>2</td>
<td>M</td>
<td>04/30/2012</td>
<td>T2</td>
<td>AgeFirstUse1</td>
<td>12</td>
<td>Warning</td>
<td>Age at First Use has valid value (not '0')</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>A</td>
<td>2</td>
<td>M</td>
<td>04/30/2012</td>
<td>T2</td>
<td>AgeFirstUse2</td>
<td>14</td>
<td>Warning</td>
<td>Age at First Use has valid value (not '0')</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>A</td>
<td>2</td>
<td>M</td>
<td>04/30/2012</td>
<td>T2</td>
<td>AgeFirstUse3</td>
<td>16</td>
<td>Warning</td>
<td>Age at First Use has valid value (not '0')</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>A</td>
<td>2</td>
<td>M</td>
<td>04/30/2012</td>
<td>T2</td>
<td>DetailedDrug1</td>
<td>0201</td>
<td>Warning</td>
<td>Detailed Drug Code (Primary) has valid value (not '0')</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>A</td>
<td>2</td>
<td>M</td>
<td>04/30/2012</td>
<td>T2</td>
<td>DetailedDrug2</td>
<td>0602</td>
<td>Warning</td>
<td>Detailed Drug Code (Secondary) has valid value (not '0')</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>A</td>
<td>2</td>
<td>M</td>
<td>04/30/2012</td>
<td>T2</td>
<td>DetailedDrug3</td>
<td>2002</td>
<td>Warning</td>
<td>Detailed Drug Code (Tertiary) has valid value (not '0')</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>A</td>
<td>2</td>
<td>M</td>
<td>04/30/2012</td>
<td>T2</td>
<td>DaysWaitTreat</td>
<td>115</td>
<td>Warning</td>
<td>Days Waiting to enter SA Treatment has valid value (not '0')</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>A</td>
<td>2</td>
<td>M</td>
<td>04/30/2012</td>
<td>T2</td>
<td>AttendanceSA</td>
<td>06</td>
<td>Warning</td>
<td>Attendance at SA Self-Help Groups has valid value (not '0')</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>A</td>
<td>2</td>
<td>M</td>
<td>04/30/2012</td>
<td>T2</td>
<td>SimSEDStat</td>
<td>1</td>
<td>Warning</td>
<td>SimSED Status value does not confide (not '0')</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>A</td>
<td>2</td>
<td>M</td>
<td>04/30/2012</td>
<td>T2</td>
<td>CoOccuringSAMH</td>
<td>4</td>
<td>Warning</td>
<td>Co-occurring SA and MH Problems is not valid (not '0')</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Blank or an invalid value indicates that the field was reported blank or was not included in the file.
9. Viewing and Correcting Data

The sections below describe how to browse, query, and edit a data file within the DSS. These features are accessed via the file name in the Working Files list on the Working Files page or the Submitted Files list on the Submitted Files page.

From the Working Files list either click on the file name or select View Detail from the drop-down menu attached to the file name.

![Figure 9-1. View Detail Option](image)

**Note:** The menu options will differ depending upon the file format.

From the Submitted Files list, click on the file name.

The Data page on the File Details page is displayed.

**9.1.1 Querying Data**

The Query Data button enables viewing of a specific record or subset of records. It can be used to examine records with errors to help you to identify the source of those errors.

1. Click the Query Data button.

![Figure 9-2. Query Data Button](image)

The data cells are empty.
2. Enter value(s) for the variable(s) that you would like to query. (For example, to view all records for male clients from a specific provider, enter the State Provider ID and 1 (Male) in the **Gender** field.)

3. Click the **Submit Query** button.

   The results are displayed in the table. All functions such as **Navigation, Search, Selection,** and **Download** are available.
4. Click the **Hide Query** button to remove the Query template.

![Figure 9-4. Query Results](image)

9.1.1.1 Downloading a Table

**Note:** This option can be used to download all records or subsets of all records if you use the **Query Data** or **Filter Table** option.

![Figure 9-6. Download Table Option](image)

1. Click the **XLS** or **CSV** button to the right of **Download Table**. A system pop-up prompts you to open or save the file.
2. Select **Open** or **Save** the file; then click **OK**. The XLS or CSV file contains all records displayed in the table.
Note: More than 65,535 records cannot be downloaded to an Excel file. The system will display the error in Figure 9-7. If an Excel file is required, download as CSV, then open the file in Excel.

![Figure 9-7. More than 65,535 Records in Excel File Message](image)

### 9.1.2 Editing Data Within the DSS

All files that have not been submitted for processing can be edited. All data from a single record can be displayed and edited on one page.

1. From the Data page, click on the row in the table that corresponds to the record to be edited.

![Figure 9-8. Selecting a Record to Edit](image)

Or:

If the record number is known, enter the record number in the View Specific Record # field and click Go.

![Figure 9-9. View Specific Record # Field](image)

All fields for the selected record are displayed on one page.
2. Click the **Edit** button.

The fields are no longer read-only and the data can be changed. The revision number in the upper right corner increases. The **Edit** button is removed. **Save As New Revision** and **Discard Changes** buttons are visible and the file is identified to be in Draft mode.
3. Use the navigation buttons in the center of the page to view and edit more records.

4. Click the **Save as New Revision** button to save the changes. The file is no longer in *Draft* mode, the revision number is updated, and the *Edit* button is visible.
5. Click on the **Back to Table** button to remove the displayed individual record and view all records in the table.
10. Submitting a File for Final Processing

This function is only for TEDS-formatted files that have gone through the Validation process.

After your TEDS Format file has been validated, you can submit your data to the BHSIS Project Office for final processing. To do this, follow the directions below.

1. From the Working Files page, click on the file name or select View Detail from the drop-down menu attached to the file name.
2. Click the Validation Results tab.
3. If you are satisfied with your file, click the Submit for Processing button.
4. A confirmation pop-up box appears.
5. Click OK.

The Submit for Processing button is no longer available on the Validation Results page because the file has been formally submitted to the BHSIS Project Office for final processing. A message confirms that the file has been submitted for processing and provides directions to view updated Validation Results. The status changes to Logged and the file is removed from the Working Files list and is added to the Submitted Files list. After the BHSIS Project Office validates and submits the data to the TEDS database, the status changes to Production.

To view files that have been submitted for processing and files that have been processed, refer to Section 11, Viewing TEDS Processed Files.
11. Viewing TEDS Processed Files

The following sections describe the functions on the Submissions page.

11.1 Submissions Page

The Submissions page displays information about your state’s TEDS-formatted files that have been submitted for processing or have been processed by the BHSIS Project Office. All TEDS-formatted files that have been uploaded, validated, submitted for processing, and processed by the BHSIS Project Office are displayed on this page. Additional details and validation results for each submission can be viewed on a separate page by clicking on the file that you would like to see.

To display desired submissions, searches can be performed on each column using the drop-down menus on the Submission Type and Status columns or by entering full or partial search criteria in the input boxes below the Reporting Date, Date Received, Submitted By, File Name, # of Records, Earliest Date, and Latest Date columns. Standard navigation tools are provided to control the number of rows displayed and to view specific records.

![Figure 11-1. Submission Page](image-url)
11.2 Submissions Description

This page provides all logged and processed files and files that have been added to the TEDS database. The description of the columns are as follows:

<table>
<thead>
<tr>
<th>Submission Type</th>
<th>Specifies if the file contains Admission or Discharge records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting Date</td>
<td>Date the state created the file</td>
</tr>
<tr>
<td>Date Received</td>
<td>Date the file is uploaded</td>
</tr>
<tr>
<td>Submitted By</td>
<td>ID of the person that uploaded the file</td>
</tr>
<tr>
<td>File Name</td>
<td>Name of the file</td>
</tr>
</tbody>
</table>

**Status**

- **Uploaded**: A file that has not been validated or converted
- **State Testing**: The State has run a trial validation on the file
- **Logged**: The file has been formally submitted by the state for final processing by the BHSIS Project Office
- **Testing**: The BHSIS Project Office is reviewing and running validation on the submitted (logged) file
- **Production**: The BHSIS Project Office has processed the file

<table>
<thead>
<tr>
<th># of Records</th>
<th>Number of records in the file</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earliest Date</td>
<td>Earliest Admission/Discharge date in the file</td>
</tr>
<tr>
<td>Latest Date</td>
<td>Latest Admission/Discharge date in the file</td>
</tr>
</tbody>
</table>

*Table 4-5. DSS Submissions Columns Description*
12. Generating a Data Profile for a TEDS-Formatted File

The Generate a Data Profile option is available only for a TEDS formatted file.

12.1 Data Profile

The statistical data in the file is depicted through a Data Profile that contains graphs, tables, and figures. The Data Profile can be generated from the File Repository or from the File Details page. To generate a data profile, follow the directions in Section 12.1.2 or 12.1.3.

12.2 Generating a Data Profile from the File Repository

1. Click the triangle (More Actions) attached to the file name; then select the Generate Data Profile option.

2. Click OK if the system displays a pop-up box indicating that the data profile was successfully generated.

3. Click the file name; or select View Detail from the drop-down menu attached to the file name.

4. The File Details page appears.

5. Click the Data Profile tab to view graphs, tables, and figures that describe the file statistics.
12.3 Generating a Data Profile from the File Details page

1. Click the Generate Data Profile button.

![Figure 12-3. Generate a Data Profile from the File Details Page]

2. Click OK if the system displays a pop-up box indicating that the data profile was successfully generated; then click the Refresh Page to View Results button.

![Figure 12-4. Generate a Data Profile Confirmation Messages]

3. The Data Profile tab becomes available.
4. Click the Data Profile tab to view graphs, tables, and figures that describe the file statistics. See Section 12.1.4, Data Profile for Admission Files, and Section 12.1.5, Data Profile for Discharge Files.

12.4 Data Profile for Admission and Discharge Files

The Data Profiles for Admission and Discharge files contain tables, bar graphs, pie charts, histograms, and more. Please see the following examples:
Figure 12-5. Data Profile for an Admission File
Figure 12-6. Data Profile for a Discharge File
13. Support Page

The **Support** page allows the state users to send any questions or bug reports to the BHSIS Project Office. Additionally, on this page, you may access the *DSS State User Manual* and the *Combined Substance Abuse and Mental Health TEDS State Instruction Manual* on the **Manuals** tab and how-to videos on the **Videos** tab.

![Figure 13-1. Support Page](image-url)
14. Audit Trail

The Audit Trail displays the activity log for all users. This page provides detailed activities performed on the Files page, the Crosswalk page, and the Submissions page.

[Image: User Activity Log]

The Type column identifies the page names on the Menu bar: Files, Data Conversion Crosswalk, and Submissions.

The Name (ID) column identifies the name of the file that was processed.

The Action column identifies the activity performed on the file. It is specific to the Type.

- Files actions include Upload, Edit Data, Validate, Submit for Processing, Convert to TEDS, Sent Back to State, and Delete.
- Data Conversion Crosswalk actions include Create, Edit, Mark as Complete, Set as Default, and Delete.
- Submissions actions include Validate, Sent Back to State, and Submit to TEDS.

The Description column provides a more detailed description of the activity.

The by User column identifies the user id of the user that performed the action.

The Date & Time column provides a timestamp for the activity.

The Type and Date & Time columns can be sorted, and the standard navigation and search tools are provided.
15. Glossary

ACCDE: Microsoft Access Execute Only Database file format

ASC: ASCII Text Computing file format

ASCII: American Standard Code for Information Interchange

BHSIS: Behavioral Health Services Information System

BMP: Bit Map Image File

CBHSQ: Center for Behavioral Health Statistics and Quality

Crosswalk Mapping: Associating state data fields and codes to TEDS data fields and codes

CSV: Comma Separated Values text file format (ASCII)

DATA: Data Format File

Data Conversion Crosswalk: Contains specific instructions for mapping or translating the data fields and categories in the state system to the appropriate TEDS data fields and categories. It provides basic information necessary to extract and, if needed, to convert state data to the TEDS specifications.

DOC: Microsoft Word File Format

DOCX: Microsoft Word Open XML Document file format

DSS: Data Submission System

GIF: Graphical Interchange Format File

I-BHS: Inventory of Behavioral Health Services

JPEG: Format developed by Joint Photographic Experts Group for storing digital photos

Legacy Crosswalk: A state data crosswalk that has been approved by the BHSIS Project Office and is stored in the DSS crosswalk database

MDB: Microsoft Access Database file format

MH: Mental Health

PDF: Portable Document Format

PNG: Portable Network Graphics format

PPT: Microsoft PowerPoint file format

PPTX: PowerPoint Open XML Presentation file format

PRN: File created by choosing "Print to File" within the Print dialog box; contains text and other content to be printed as well as instructions for the printer

SA: Substance Abuse
**SAMHSA**: Substance Abuse and Mental Health Services Administration

**SAS**: Statistical Analysis Software format file

**SAV**: SPSS Data File format

**SPSS**: Statistical Package for the Social Sciences

**STSS**: State TEDS Submission System

**TEDS**: Treatment Episode Data Set

**TIFF**: Tagged Image File Format

**TXT**: Plain Text File format

**XLS**: Excel Spreadsheet format file

**XLSX**: Microsoft Excel Open XML Spreadsheet format file
Appendix A

Admission and Discharge Records Structure and File Specifications

For states that are submitting fixed-length ASCII flat files:

(1) Three fixed record length sizes are currently accepted by the DSS application.
    - Short fixed-length (Admissions-138, Discharges-137): For substance abuse reporting only. This is a backward compatible fixed length (i.e., the old file format continues to be accepted).
    - Medium fixed-length (Admissions-147, Discharges-137): For substance abuse reporting only. This becomes the applicable fixed-length for substance abuse admission records when the following data fields have been included: Diagnostic Code Set Identifier (SuDS 18) and Substance Abuse Diagnosis (SuDS 19). A discharge record with record length of 137 is deemed to have a field value of \textit{D Discharge – Substance abuse treatment} for Client Transaction Type (DIS 28).
    - Long fixed-length files (Admissions-178, Discharges-170): For mental health reporting as well as for substance abuse reporting when any of the optional mental health data fields are reported.

(2) Fields must occupy the column(s) specified in the file structure tables.
(3) All fields must have valid values Please refer to the \textit{Combined Substance Abuse and Mental Health TEDS State Instruction Manual} for guidelines.
(4) Only printable alphanumeric ASCII characters are valid.
(5) Numeric fields must be right-justified and filled with zeros.
(6) All alphanumeric fields must use valid entries with no blank spaces, except State Provider Identifier and Client Identifier, which must be left-justified and filled with blank spaces.
(7) A field populated with 9s, indicating \textit{Invalid data}, is reserved for use by the BHSIS Project Office.
(8) The end of a record may be indicated with either LF (line feed) or CR-LF (carriage return-line feed).
(9) End-of-file markers are optional, as is line feed (LF) for the last record in the file.

Admission Record Structure

The data fields of the admission record are:

- **System Data Set (SDS)**
  Fields 1–3 are processing control fields. They identify the type of submission, the state, and the reporting date. Each state is required to submit data for all SDS fields.

- **Minimum Data Set (MDS)**
  Fields 4–30 include demographic, substance abuse, and treatment characteristics. Each state is required to submit data for all MDS fields. Substance abuse data in the MDS fields are optional.
for mental health. However, states are encouraged to submit this information when collected for mental health clients with a co-occurring substance abuse problem.

**Supplemental Data Set (SuDS)**

Fields 31–47 include psycho-socioeconomic characteristics or additional detail for MDS data fields.

Except for those fields designated as National Outcome Measures (NOMs), reporting of SuDS data fields is optional for both mental health and substance abuse. However, states are encouraged to report all SuDS fields available in the state data system.

Fields 48–49 have been appended to the admission record. Field 48 identifies the diagnostic code set used to report the substance abuse and mental health diagnostic codes. SuDS 19 (field 49) will replace SuDS 4 and has been formatted to also accommodate the longer ICD-10 codes.

The introduction of these two new fields allows for flexibility in reporting diagnostic codes. States may use different code sets to report diagnostic codes across different records but should use a consistent code set for reporting the substance abuse and mental health diagnostic codes within the same record.

The substance abuse field allows for separate reporting of the substance abuse diagnosis and mental health diagnosis.

**Mental Health Admission Data Set (MHA)**

Fields 50–56 are mental health fields that have been appended to the admission record. These are optional reporting for substance abuse but states are encouraged to submit the information, if available, for substance abuse clients with a co-occurring mental health problem.

### Admission File Specifications

<table>
<thead>
<tr>
<th>Field Position</th>
<th>Field</th>
<th>Field Name</th>
<th>Data Type</th>
<th>Field Length</th>
<th>Begin Column</th>
<th>End Column</th>
<th>For fixed-length ASCII flat files</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>System Data Set</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>SDS 1</td>
<td>System Transaction Type</td>
<td>Alphanumeric</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2 KEY</td>
<td>SDS 2</td>
<td>State Code</td>
<td>Alphanumeric</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>SDS 3</td>
<td>Reporting Date</td>
<td>Numeric</td>
<td>6</td>
<td>4</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Minimum Data Set</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 KEY</td>
<td>MDS 1</td>
<td>State Provider Identifier</td>
<td>Alphanumeric</td>
<td>15</td>
<td>10</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>5 KEY</td>
<td>MDS 2</td>
<td>Client Identifier</td>
<td>Alphanumeric</td>
<td>15</td>
<td>25</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td>6 KEY</td>
<td>MDS 3</td>
<td>Codependent/Collateral</td>
<td>Numeric</td>
<td>1</td>
<td>40</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>7 KEY</td>
<td>MDS 4</td>
<td>Client Transaction Type</td>
<td>Alphanumeric</td>
<td>1</td>
<td>41</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>8 KEY</td>
<td>MDS 5</td>
<td>Date of Admission</td>
<td>Numeric</td>
<td>8</td>
<td>42</td>
<td>49</td>
<td></td>
</tr>
<tr>
<td>Field Position</td>
<td>Field</td>
<td>Field Name</td>
<td>Data Type</td>
<td>Field Length</td>
<td>Begin Column</td>
<td>End Column</td>
<td></td>
</tr>
<tr>
<td>----------------</td>
<td>---------</td>
<td>-------------------------------------------------</td>
<td>-----------</td>
<td>--------------</td>
<td>--------------</td>
<td>------------</td>
<td></td>
</tr>
<tr>
<td>9 KEY</td>
<td>MDS 18</td>
<td>Type of Treatment Service/Setting</td>
<td>Numeric</td>
<td>2</td>
<td>50</td>
<td>51</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>MDS 6</td>
<td>Previous SA Treatment Episodes</td>
<td>Numeric</td>
<td>1</td>
<td>52</td>
<td>52</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>MDS 7</td>
<td>Referral Source</td>
<td>Numeric</td>
<td>2</td>
<td>53</td>
<td>54</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>MDS 8</td>
<td>Date of Birth</td>
<td>Numeric</td>
<td>8</td>
<td>55</td>
<td>62</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>MDS 9</td>
<td>Gender</td>
<td>Numeric</td>
<td>1</td>
<td>63</td>
<td>63</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>MDS 10</td>
<td>Race</td>
<td>Numeric</td>
<td>2</td>
<td>64</td>
<td>65</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>MDS 11</td>
<td>Hispanic or Latino Origin (Ethnicity)</td>
<td>Numeric</td>
<td>2</td>
<td>66</td>
<td>67</td>
<td></td>
</tr>
<tr>
<td>16 NOM</td>
<td>MDS 12</td>
<td>Education</td>
<td>Numeric</td>
<td>2</td>
<td>68</td>
<td>69</td>
<td></td>
</tr>
<tr>
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**Mental Health Admission Data Set**

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Discharge/Update Record Structure

The data fields of the discharge or update record are described below. Each state is required to submit data for all fields except for CGAS/GAF score which remains optional.

System Data Set (SDS)

Fields 1–3 and 32 are processing control fields. They identify the type of submission, the state, and the reporting date.

Key Discharge Fields

Fields 4–10 are used to uniquely identify each record. Fields 4–9 are Key fields.

Fields from Admission Record

Fields 11–20 contain data from the admission record that is associated with the discharge record. The fields identified as “link” are those that are used to link the admission and discharge/update records, and the remaining fields are used for verification. Link records represent a complete treatment episode or a treatment event.

National Outcome Measures (NOMs)

Fields 21–31 contain the NOMs data fields and are collected at time of discharge from treatment or at time of data update.

Mental Health Discharge/Update Data Set (MHD)

Fields 33–40 are specific to mental health and are collected at time of discharge from treatment or at time of data update.

Discharge/Update File Specifications

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For fixed-length ASCII flat files

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