

## Instructions for CSA Forms Completion

Note: You will receive an email when forms are updated. To ensure you are using the most recent form version, download it from the CSA web site for each use.

All program materials are numbered for easy reference. Please note the document number (and title) when contacting CSA for assistance with materials.

Most forms are provided in both, PDF format for printing and completing manually; and in editable PDF format for completing electronically, then printing (save to your computer before completing, using the patient's name).

Forms provided in both PDF and editable PDF format will appear twice in the list of forms, with the same document number; the editable forms will include the term "editable" at the end of the file name.

Only the checklist (form #11) is provided only in PDF format for printing and manual completion.

### How to use CSA forms with editable fields:

1. Do not attempt to fill out the forms while on the internet. The forms' automatic calculations tend to perform poorly, and errors may occur.  
Save the selected form to a folder on your computer before beginning to complete the form.
2. If you wish to pre-fill some fields with your specific facility's information:
  - a. First save the form to your computer
  - b. Edit the form with the information about your facility that must be included for every form
  - c. Save the changes
  - d. The form is now ready to be used for individual patients and you will not need to re-enter the facility information again.
3. To use the form:
  - a. You may copy the prefilled form, past it into a file and rename it for the patient for which you are completing the form or
  - b. You may open the form and use the "save as" feature to save it under a different name (the patient's name).
  - c. It is highly recommended that you include the date of the form entries in the file name to ensure that you can easily identify the file later.

For example: CSA\_Applic\_YulBrenner\_10.12.13

4. It is recommended that you periodically save the changes to the forms as you make edits or enter the patient's information, to prevent loss of information should you be interrupted.
5. Further, it is recommended that you create folders on your computer and label them with pertinent names to help you to locate files later.

For example, the folder name might be: CSA\_Applications\_FY2014

6. The forms with editable fields may also be printed and completed manually. The blank editable forms will have a different appearance to each field that must be completed.

It is recommended that you print the PDF format instead for manual completion.

7. Please contact our office if you discover any issues with use of the editable forms, or have questions about any program materials.