

CRMS Web

Version 1.0



Amended under the authority of the President of CRMS Software
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Introduction

CRMS Web is the latest iteration of CRMS Software, following the design queues of CRMS V2. CRMS Web has been designed to allow staff to access CRMS from any web based computer - whether a Windows based PC, a Macintosh OS/X computer, a Linux based computer, or even a mobile device such as a tablet or smartphone.

CRMS Web has been designed following the same queues as CRMS v2 thereby saving CRMS Administrators valuable time when training new or existing staff members.

Please note that this product is still in development and constantly evolving. As such the documentation is still being finalized.



*****UNDER CONSTRUCTION***** - *This manual is still under construction. Please contact CRMS Support to determine if an update is available.*

Please contact CRMS Support should you experience any issues or require any assistance with this product.

CRMS Support

Submitting a Ticket - Refer to page 316 for how to submit a ticket. This is the best method to ensure your issues is dealt in a timely manner.

Email – support@crms-software.com

Phone – 1.800.617.2767 x 221

Login into CRMS Web

1. Open your favourite web browser and navigate to the CRMS Web link provided by your IT.



Please contact your IT Department if you are unsure of your CRMS Web link. It will vary for each agency.

2. Figure 1 below demonstrates the login screen after visiting the CRMS Web website.

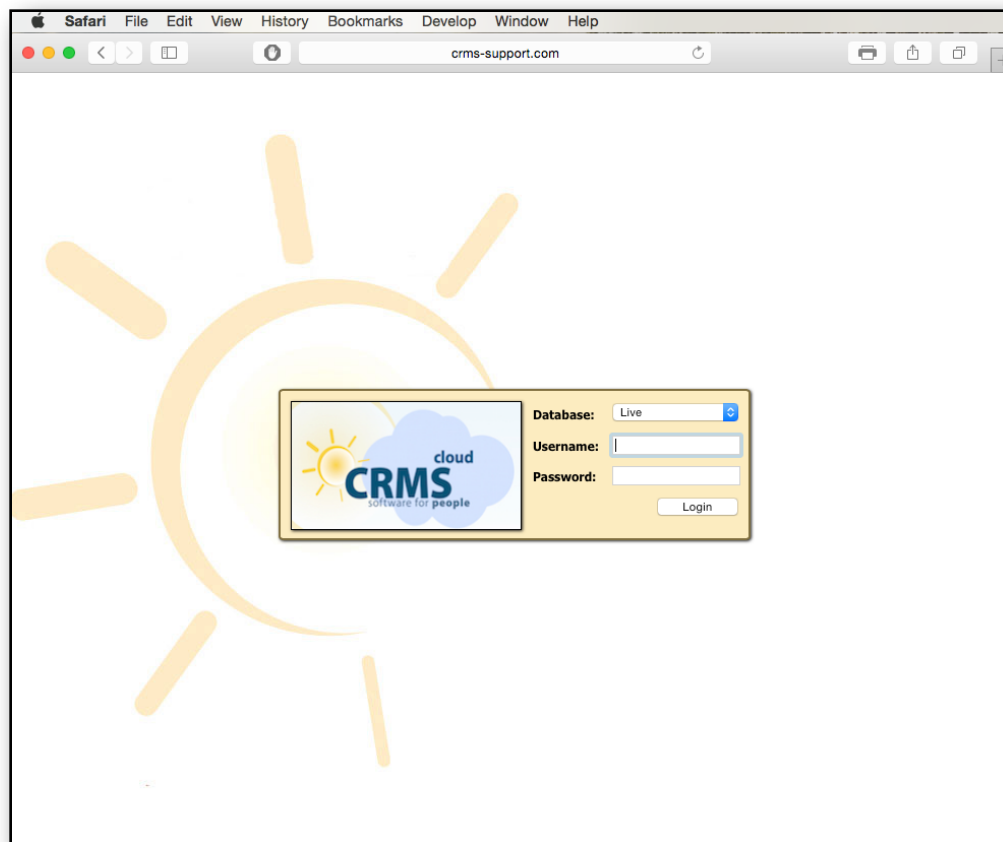


Figure 1 - CRMS Web Login Screen

3. Enter your CRMS username and password. Ensure the correct database is selected.



****TIPS AND TRICKS* - The CRMS Web username/password is identical to their CRMS v2 User Profile.***

4. After entering the username / password, click **Login**.
5. CRMS Web will then appear on screen. Users can confirm which database they are logged into by verifying the title bar as shown below in Figure 2.

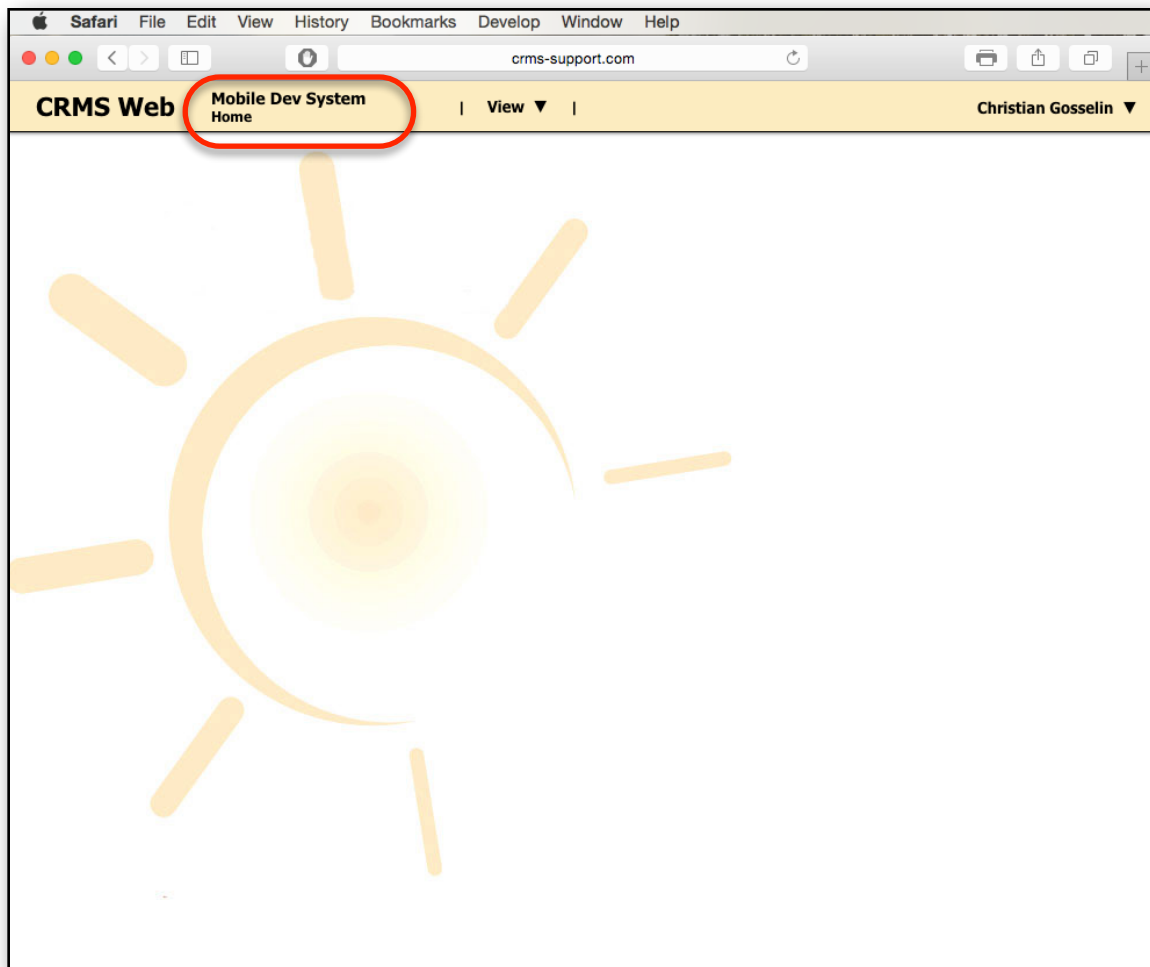


Figure 2 - CRMS Web

6. In Figure 2 above, the user has logged into the **Mobile Dev System**. Please ensure you are connected into the right database prior to continuing.

CRMS Search Engine

The CRMS Search Engine allows users to search for client files, contacts, non client services, client groups, information & referral, follow up's as well as Crisis Calls (if applicable).

1. To access the CRMS Search Engine, click the **View** menu and select **CRMS Search Engine** as shown in Figure 3.

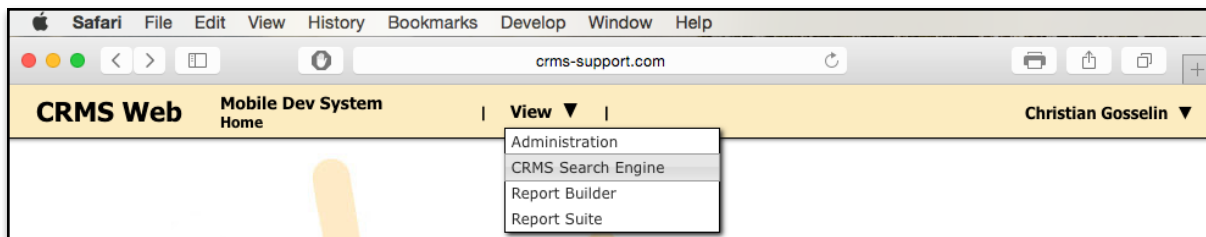


Figure 3 - Accessing CRMS Search Engine

2. The CRMS Search Engine will then appear on screen as illustrated in Figure 4.

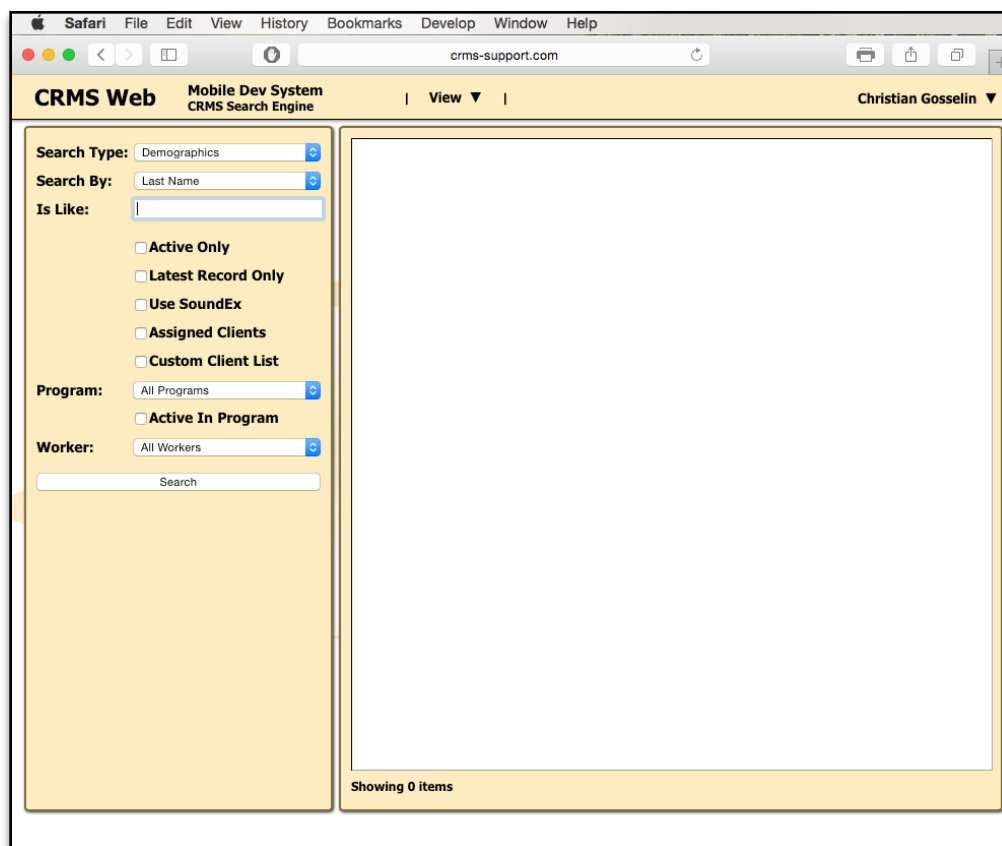


Figure 4 - CRMS Search Engine

Searching Demographics

1. To search for a desired client, ensure **Demographics** is selected in the **Search Type** drop down as seen in Figure 5.

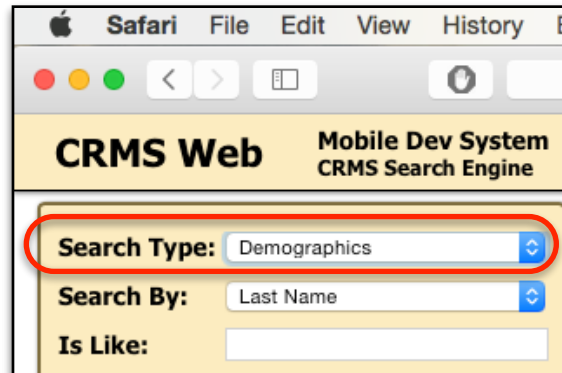


Figure 5 - Searching for a Client

2. Select the desired **Search By** criteria. In Figure 5 above, the user is performing a search by the clients 'Last Name'.
3. In the **Is Like** text box, enter the search criteria. In Figure 6 below, a user is searching for any client which the last name contains the letters 'bie'.

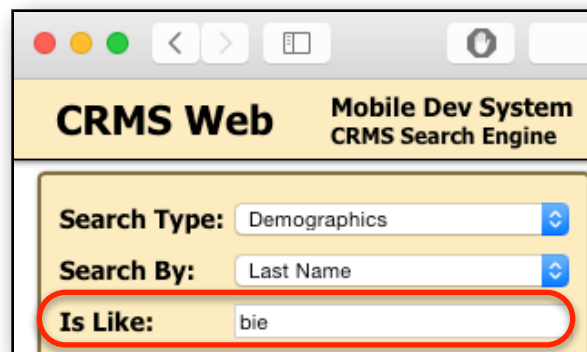


Figure 6 - Inputting Search Criteria

4. To ensure accurate search results, verify the search filters. These options can greatly vary the search results. See following page for Figure 7 demonstrating these search filters.

Figure 7 - Search Filters

5. Table 1 below outlines the functionality of these search filters.

Search Filter	Function
Active Only	Returns only active clients - those currently receiving services
Latest Record Only	Return the latest client file - whether 'Active' or 'Not Active'
Use SoundEx	Performs a phonetic search
Assigned Clients	Returns the logged in workers' delegated case load
Custom Client List	Return the logged in workers' custom client list
Program	Filters the search results by Program
Worker	Filters the search results by Worker

6. When satisfied with the Search Criteria and Search Filters, click **Search** to perform the search as shown in Figure 8.

Figure 8 - Performing Search

7. Figure 9 (see following page) demonstrates the CRMS Search Engine after having executed a client search.

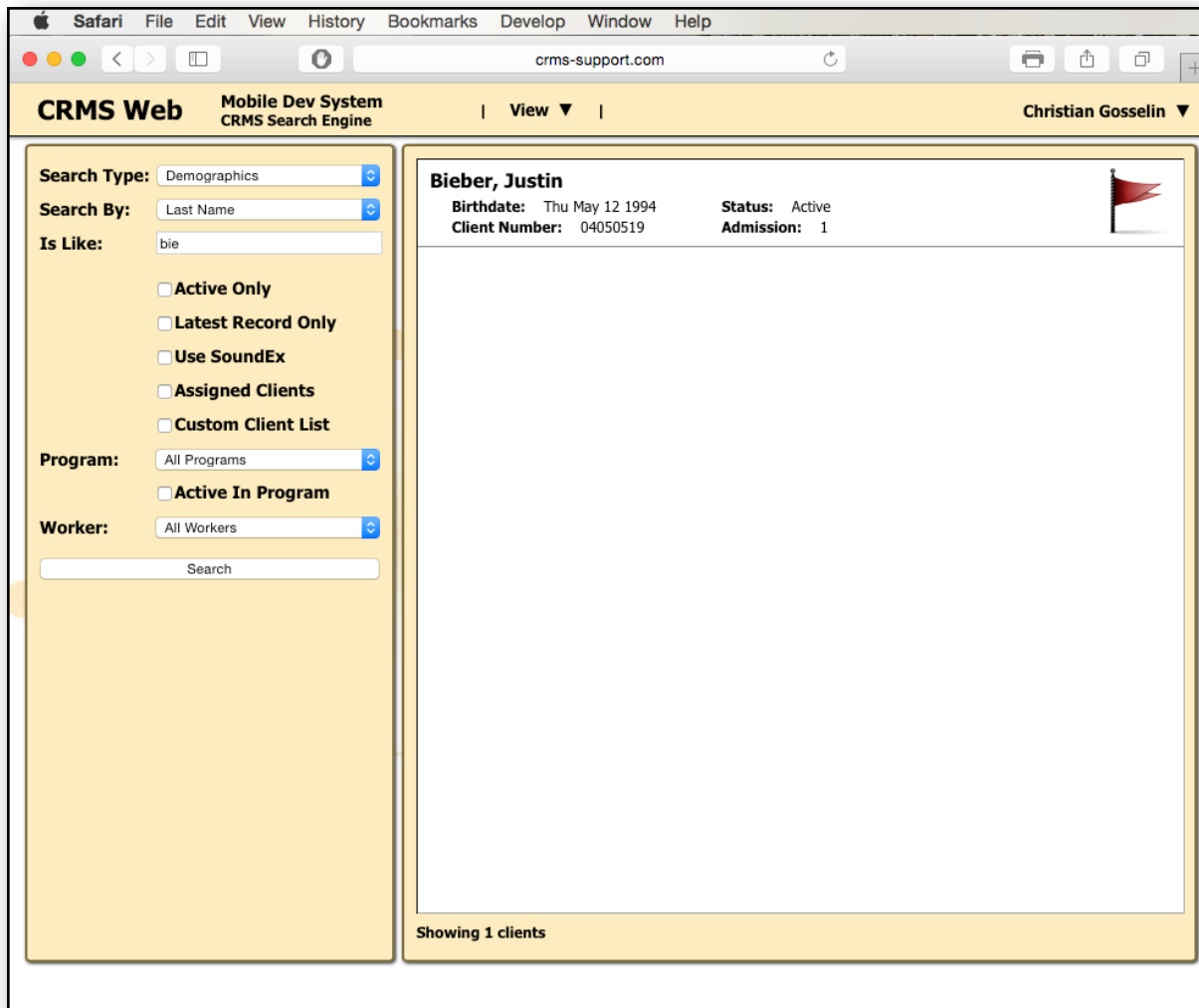


Figure 9 - Search Results

8. The number of returned search results is displayed at the bottom of Figure 9 above. This is illustrated further in Figure 10 below.

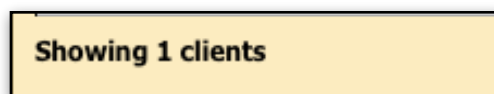


Figure 10- Number of Search Results

9. Click on the desired client from the returned search results, to bring up the “**Entity Actions**” menu. The following sections of the manual will describe the other search types found on the CRMS Search Engine.

Searching Contact History

1. To search for a contact, change the **Search Type** to **Contacts History by Worker** as shown in Figure 11.

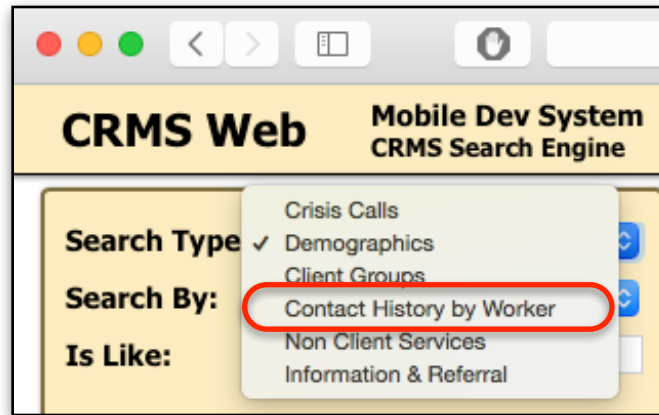


Figure 11 - Changing Search Type to Contact History by Worker

2. The Search Engine will refresh and a new search interface will appear as shown below in Figure 12.

A screenshot of the 'CRMS Web' search interface. The page has a yellow header with 'CRMS Web' and 'Mobile Dev System CRMS Search Engine'. Below the header, there's a search form. The 'Search Type' dropdown is set to 'Contact History by Worker'. Below it, there are input fields for 'Start Date' (08/13/2015) and 'End Date' (08/13/2015). There are also dropdown menus for 'Program' (All Programs) and 'Worker' (All Workers). At the bottom of the form is a 'Search' button.

Figure 12 - Search Type Changed to "Contact History by Worker"

3. Modify the search parameters as necessary - adjust the **Start Date**, **End Date**, **Program** and **Worker** as necessary. Once satisfied, click Search to execute a search for contacts.
4. In Figure 13 (see following page), a user is searching for contacts which occurred between 05/01/2015 and 08/13/2015 for All Programs and All Workers.

CRMS Web

Mobile Dev System
CRMS Search Engine

View ▼

Christian Gosselin ▼

Search Type: Contact History by Worker

Start Date: 05/01/2015

End Date: 08/13/2015

Program: All Programs

Worker: All Workers

Search

Contact Date: Mon Aug 10 2015	Client: Bieber, Justin (04050519-01)	
Type: Direct	Program: Case Management	
Total Time: 30 minutes	Worker: Christian Gosselin	
	Activities: CON	
Contact Date: Mon Aug 10 2015	Client: Adâmé, François (04050290-01)	
Type: Direct	Program: Addictions	
Total Time: 5 minutes	Worker: Marko Palikko	
	Activities: CMA	
Contact Date: Mon Aug 10 2015	Client: Adâmé, François (04050290-01)	
Type: Direct	Program: Community Support Services	
Total Time: 20 minutes	Worker: Marko Palikko	
	Activities: CMA	
Contact Date: Mon Aug 10 2015	Client: Adâmé, François (04050290-01)	
Type: Direct	Program: Community Support Services	
Total Time: 20 minutes	Worker: Marko Palikko	
	Activities: CMA	
Contact Date: Mon Aug 10 2015	Client: Adâmé, François (04050290-01)	
Type: Direct	Program: Addictions	
Total Time: 10 minutes	Worker: Marko Palikko	
	Activities: CMA	
Contact Date: Mon Aug 10 2015	Client: Adâmé, François (04050290-01)	
Type: Direct	Program: Addictions	
Total Time: 10 minutes	Worker: Marko Palikko	
	Activities: CMA	
Contact Date: Mon Aug 10 2015	Client: Adâmé, François (04050290-01)	
Type: Direct	Program: Case Management	
Total Time: 10 minutes	Worker: Marko Palikko	
	Activities: CMA	
Contact Date: Mon Aug 10 2015	Client: Adâmé, François (04050290-01)	
Type: Direct	Program: Addictions	
Total Time: 10 minutes	Worker: Marko Palikko	
	Activities: CMA	

Showing 21 contacts Direct Time: 8.83 hrs.

Figure 13 - Contact History by Worker Search Results

- Note in Figure 13 above, the number of results are displayed at the bottom of the search results - 21 contacts were returned by the search for a total direct time of 8.83 hours.

Viewing a Contact

- In order to modify a previously saved contact, refer to page 20 above for how to access the CRMS Search Engine and change the **Search Type** to **Contact History by Worker**.
- Execute a search by modifying the parameters as necessary.
- Once the desired contact has been located, **click** on it to bring up the “Entity Actions” menu shown in Figure 14.

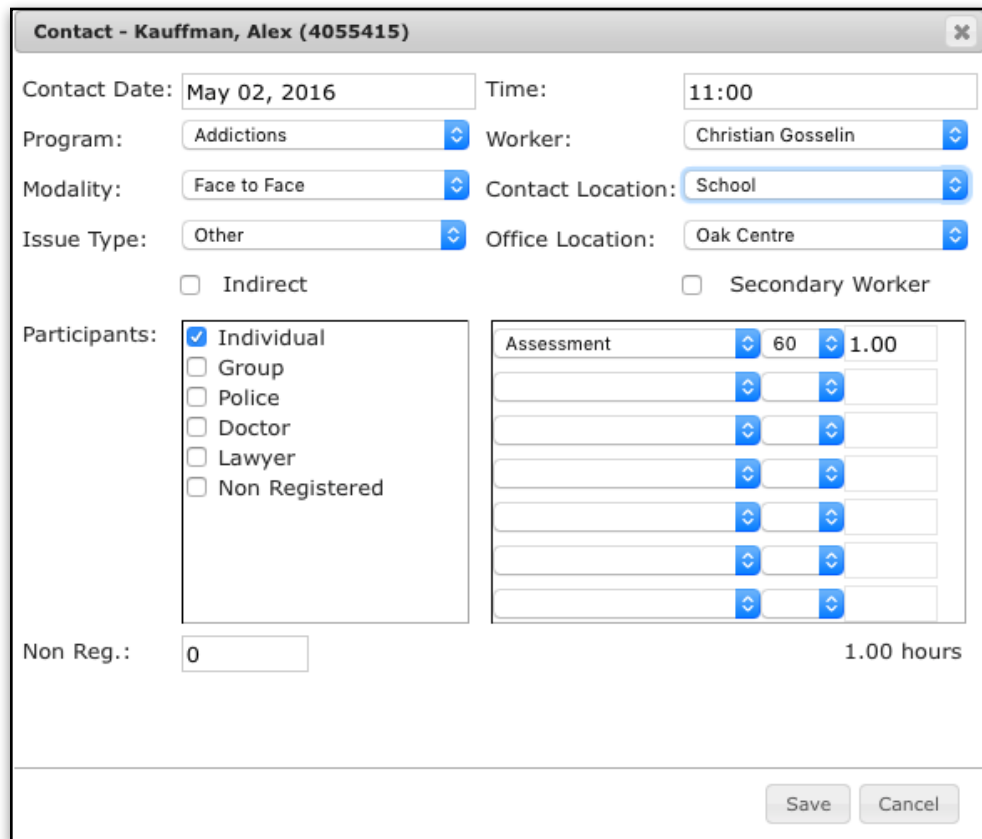
Entity Actions

View Contact

Figure 14 - Viewing Contact

- Click on **View Contact** to bring up the Contact Dialog (see following page) as seen in Figure 15.

5. Modify the contact as necessary and when satisfied, click **Save** to finalize the process.



The dialog box is titled "Contact - Kauffman, Alex (4055415)". It contains the following fields and options:

- Contact Date: May 02, 2016
- Time: 11:00
- Program: Addictions
- Worker: Christian Gosselin
- Modality: Face to Face
- Contact Location: School
- Issue Type: Other
- Office Location: Oak Centre
- ☐ Indirect
- ☐ Secondary Worker
- Participants:
 - ☒ Individual
 - ☐ Group
 - ☐ Police
 - ☐ Doctor
 - ☐ Lawyer
 - ☐ Non Registered
- Assessment: 60 1.00
- Non Reg.: 0
- 1.00 hours
- Save
- Cancel

Figure 15 - Contact Dialog

6. A message box will appear confirming the process was indeed successful.



Figure 16 - Successfully Modified Contact

Searching Client Groups

1. To search for a group, change the **Search Type** to **Client Groups** as shown in Figure 17.

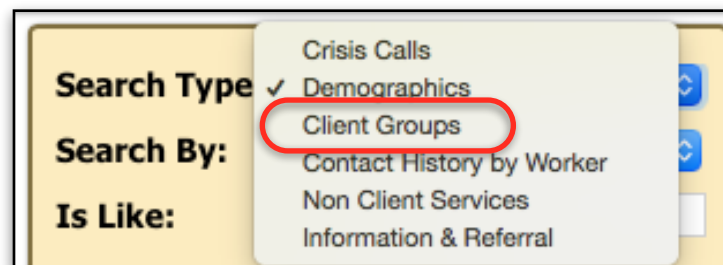


Figure 17 - Changing Search Type to “Client Groups”

2. Upon changing the Search Type, the CRMS Search Engine interface will change as demonstrated in Figure 18.

A screenshot of the 'Client Groups Search Interface'. It features a yellow background with several search parameters: 'Search Type:' with a dropdown menu set to 'Client Groups'; 'Search By:' with a dropdown menu set to 'Name'; 'Is Like:' with a text input field; an 'Active Only' checkbox; 'Program:' with a dropdown menu set to 'All Programs'; and 'Worker:' with a dropdown menu set to 'All Workers'. At the bottom, there is a 'Search' button.

Figure 18 - Client Groups Search Interface

3. Modify the Search Parameters as necessary. Enter the desired search criteria in the **Is Like** text box and adjust remaining search criteria as needed.
4. Users can filter to see only Active groups, as well as filter by program and worker.
5. A user can input their desired search criteria in the **Is Like** text box, or alternatively leave it blank and perform a wildcard search.
6. This is demonstrated in Figure 19 (see following page).

Search Type: Client Groups Search By: Group Name Is Like: ☐ Active Only Program: All Programs Worker: All Workers Search	<table border="1"> <tr> <td colspan="2">Activities</td> </tr> <tr> <td>Number of Clients: 2</td> <td>Program: Case Management</td> </tr> <tr> <td>Inactive Clients: 1</td> <td>Worker:</td> </tr> <tr> <td colspan="2">Agency Tours</td> </tr> <tr> <td>Number of Clients: 1</td> <td>Program: Outreach Services</td> </tr> <tr> <td>Inactive Clients: 1</td> <td>Worker:</td> </tr> <tr> <td colspan="2">aka baka roo</td> </tr> <tr> <td>Number of Clients: 0</td> <td>Program: Case Management</td> </tr> <tr> <td>Inactive Clients: 0</td> <td>Worker: Christian Gosselin</td> </tr> <tr> <td colspan="2">aka baka roo</td> </tr> <tr> <td>Number of Clients: 0</td> <td>Program: Case Management</td> </tr> <tr> <td>Inactive Clients: 0</td> <td>Worker: Christian Gosselin</td> </tr> <tr> <td colspan="2">Anger Management</td> </tr> <tr> <td>Number of Clients: 6</td> <td>Program: Case Management</td> </tr> <tr> <td>Inactive Clients: 2</td> <td>Worker: Christian Gosselin</td> </tr> <tr> <td colspan="2">Anger Management - School B</td> </tr> <tr> <td>Number of Clients: 5</td> <td>Program: Case Management</td> </tr> <tr> <td>Inactive Clients: 1</td> <td>Worker: Christian Gosselin</td> </tr> <tr> <td colspan="2">Anxiety</td> </tr> <tr> <td>Number of Clients: 2</td> <td>Program: CSI</td> </tr> <tr> <td>Inactive Clients: 0</td> <td>Worker: Christian Gosselin</td> </tr> <tr> <td colspan="2">Anxiety</td> </tr> <tr> <td>Number of Clients: 0</td> <td>Program: Case Management</td> </tr> <tr> <td>Inactive Clients: 0</td> <td>Worker: Christian Gosselin</td> </tr> </table> Showing 67 client groups	Activities		Number of Clients: 2	Program: Case Management	Inactive Clients: 1	Worker:	Agency Tours		Number of Clients: 1	Program: Outreach Services	Inactive Clients: 1	Worker:	aka baka roo		Number of Clients: 0	Program: Case Management	Inactive Clients: 0	Worker: Christian Gosselin	aka baka roo		Number of Clients: 0	Program: Case Management	Inactive Clients: 0	Worker: Christian Gosselin	Anger Management		Number of Clients: 6	Program: Case Management	Inactive Clients: 2	Worker: Christian Gosselin	Anger Management - School B		Number of Clients: 5	Program: Case Management	Inactive Clients: 1	Worker: Christian Gosselin	Anxiety		Number of Clients: 2	Program: CSI	Inactive Clients: 0	Worker: Christian Gosselin	Anxiety		Number of Clients: 0	Program: Case Management	Inactive Clients: 0	Worker: Christian Gosselin
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Anxiety																																																	
Number of Clients: 0	Program: Case Management																																																
Inactive Clients: 0	Worker: Christian Gosselin																																																

Figure 19 - Searching for a Client Group

7. As can be seen in Figure 19 above, 67 client groups were returned after executing a wild card search.
8. Refer to page 89 below for how to create a group contact, group note, or page 85 to modify the clients belonging to the groups.

Searching Non Client Services

1. To search for non client services data, change the **Search Type** to **Non Client Services** as shown in Figure 20.

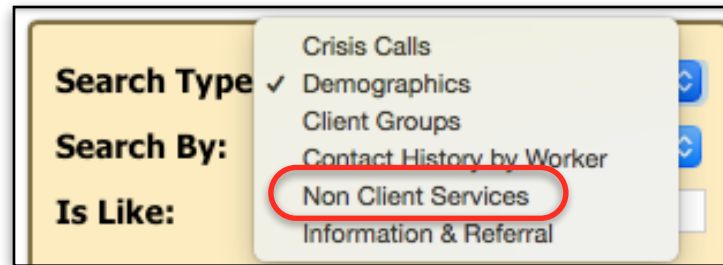


Figure 20 - Changing Search Type to “Non Client Services”

2. Upon changing the Search Type, the CRMS Search Engine interface will change as demonstrated in Figure 21.

A screenshot of the CRMS Search Engine interface. It features a 'Search Type' dropdown menu set to 'Non Client Services'. Below this are input fields for 'Start Date' and 'End Date', both set to 'Jun 01, 2016'. There is a 'Type Filter' dropdown set to 'Staff Time' and a 'Worker' dropdown set to 'All Workers'. At the bottom of the form is a large 'Search' button.

Figure 21 - Non Client Services Search Interface

3. Modify the search parameters as necessary using the available date, type and worker filters.
4. Once satisfied with the search criteria, click **Search** as seen in Figure 22.

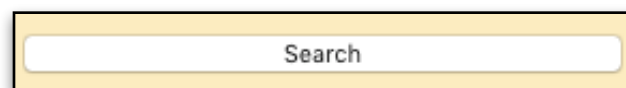


Figure 22 - Searching for Non Client Services Data

5. The Non Client Services module will then refresh and display any data which matches the inputted search criteria.
6. This is demonstrated on the following page on Figure 23.

Date	User	Activity	Time
Wed Jan 06 2016	Christian Gosselin	Education	60 min.
Wed Dec 09 2015	Christian Gosselin	Education	90 min.
Fri Oct 23 2015	Christian Gosselin	Training	90 min.
Tue May 05 2015	Christian Gosselin	Training	120 min.
Tue Mar 03 2015	Christian Gosselin	Team Meetings	60 min.
Wed Feb 11 2015	Christian Gosselin	Education	60 min.
Thu Feb 05 2015	Christian Gosselin	Documentation	60 min.
Fri Jan 09 2015	Christian Gosselin	Training	60 min.
Mon Oct 20 2014	Christian Gosselin	Documentation	15 min.
Tue Sep 02 2014	Christian Gosselin	Documentation	45 min.
Fri Aug 22 2014	Christian Gosselin	Training	75 min.
Thu Aug 21 2014	Christian Gosselin	Team Meetings	60 min.
Fri Aug 15 2014	Christian Gosselin	Training	60 min.
Thu Jul 17 2014	Christian Gosselin	Training	90 min.
Mon May 12 2014	Christian Gosselin	Team Meetings	45 min.
Tue May 06 2014	Christian Gosselin	Training	240 min.
Tue Feb 11 2014	Christian Gosselin	Documentation	90 min.
Thu Jan 23 2014	Christian Gosselin	Team Meetings	60 min.
Showing 18 items			

Figure 23 - Reviewing Non Client Services Data

Creating a New Non Client Services Entry

1. In order to create a new non client services entry, refer to page 25 above for how to access the **Non Client Services Search Type** on the CRMS Search Engine.
2. Click anywhere in the Non Client Services module to bring up the “Entity Actions” menu option demonstrated in Figure 26.

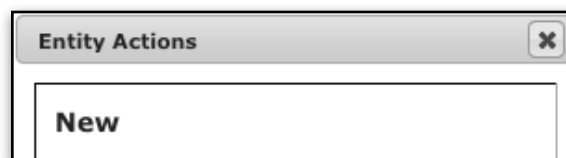


Figure 26 - Creating a New Non Client Services Entry

3. Click **New** to bring up the Non Client Services Dialog. Figure 27 on the following pages demonstrates the Non Client Services Dialog.

Non Client Services

☒ Staff Time
 ☐ Compensation
 ☐ Scheduled Hours

Date: Jun 01, 2016

Time: 0 minutes

Code: Documentation

Program: Addictions

Details:

Save Cancel

Figure 27 - Non Client Services Dialog

4. Fill out the necessary details. Note in Figure 27 above, a user can input **Staff Time**, or **Compensation**, or **Scheduled Hours** all from the same dialog.
5. Figure 28 below demonstrates a user inputting staff time into the software.

Non Client Services

☒ Staff Time
 ☐ Compensation
 ☐ Scheduled Hours

Date: Jun 01, 2016

Time: 60 minutes

Code: Team Meetings

Program: Case Management

Details: Discussed Agency specific protocols to follow in CRMS when documenting case notes / contacts.

Save Cancel

Figure 28 - Non Client Services Dialog

6. When satisfied with the inputted data, click **Save** to finalize the process.
7. A message box will appear confirming the process was indeed successful.



Figure 29 - Successfully Saved Non Client Services Data

8. The Non Client Services Dialog will then automatically close.
9. Click **Search** once more to refresh the Non Client Services module.
10. The newly inputted data will then be visible - ensure the search parameters are properly configured if the data does not appear.

Date	User	Activity	Time
Wed Jun 01 2016	Christian Gosselin	Team Meetings	60 min.

Figure 30 - Reviewing Newly Inputted Non Client Services Data

Modifying Non Client Services Data

1. Refer to page 25 above for how to access the **Non Client Services Search Type** on the CRMS Search Engine.
2. Modify the search parameters as necessary - in Figure 31 below a user is searching for 'Staff Time' data between June 1, 2016 and June 2, 2016 for 'All Workers'.

Search Type: Non Client Services

Start Date: Jun 01, 2016

End Date: Jun 02, 2016

Type Filter: Staff Time

Worker: All Workers

Search

Figure 31 - Searching for Non Client Services Data

3. The CRMS Search Engine will return any data which matches the search parameters.

Date	User	Activity	Time
Wed Jun 01 2016	Christian Gosselin	Team Meetings	60 min.

Figure 32 - Modifying Non Client Services Data

4. **Click** on the desired non client services entry to bring up the “Entity Actions” menu. Click **View/Edit** as seen in Figure 33.

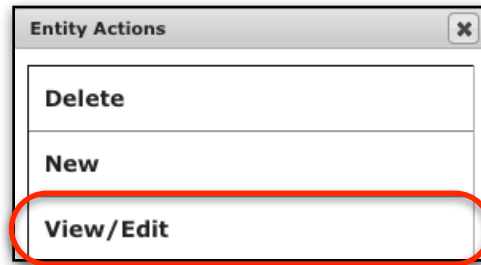


Figure 33 - Modifying Non Client Services Data

5. The Non Client Services Dialog will then appear on screen as shown in Figure 34.

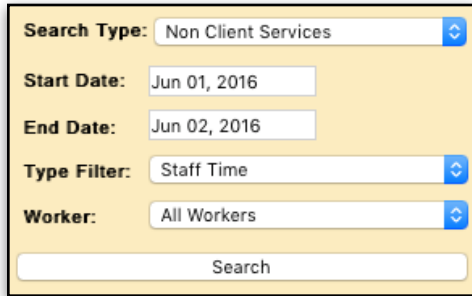
A screenshot of a software dialog box titled "Non Client Services". It has three radio buttons at the top: "Staff Time" (selected), "Compensation", and "Scheduled Hours". Below these are several input fields: "Date:" with a date picker showing "Jun 01, 2016"; "Time:" with a spinner set to "60" and the unit "minutes"; "Code:" with a dropdown menu showing "Team Meetings"; and "Program:" with a dropdown menu showing "Case Management". There is a "Details:" section with a text area containing the text: "Discussed Agency specific protocols to follow in CRMS when documenting case notes / contacts." At the bottom right are "Save" and "Cancel" buttons.

Figure 34 - Editing Non Client Services Data

6. Modify the data as necessary, and when satisfied click **Save** to finalize the process.

Deleting Non Client Services Data

1. Refer to page 25 above for how to access the **Non Client Services Search Type** on the CRMS Search Engine.
2. Modify the search parameters as necessary - in Figure 35 (see following page) a user is searching for 'Staff Time' data between June 1, 2016 and June 2, 2016 for 'All Workers'.



Search Type: Non Client Services

Start Date: Jun 01, 2016

End Date: Jun 02, 2016

Type Filter: Staff Time

Worker: All Workers

Search

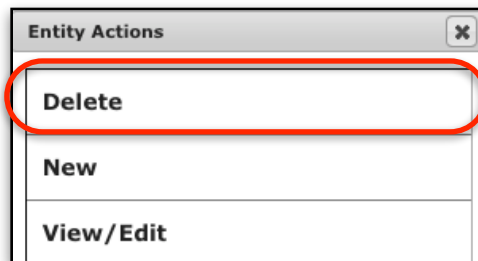
Figure 35 - Searching for Non Client Services Data

- The CRMS Search Engine will return any data which matches the search parameters.

Date	User	Activity	Time
Wed Jun 01 2016	Christian Gosselin	Team Meetings	60 min.

Figure 36 - Deleting Non Client Services Data

- Click** on the desired non client services entry to bring up the “Entity Actions” menu. Click **Delete** as seen in Figure 37.



Entity Actions

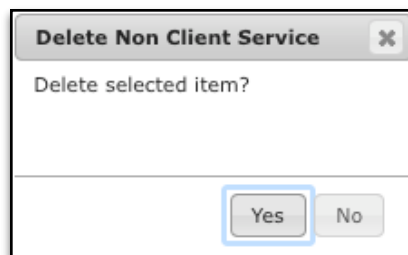
Delete

New

View/Edit

Figure 37 - Deleting Non Client Services Data

- A confirmation dialog will be presenting allow the user to cancel if desired. If the data is meant to be deleted, click **Yes** to finalize the process.



Delete Non Client Service

Delete selected item?

Yes No

Figure 38 - Deleting Non Client Services Data

- A message box will appear confirming the process was successful.



Figure 39 - Successfully Deleted Non Client Services Data

7. Click **Search** on the CRMS Search Engine to refresh the search results.
8. As can be seen in Figure 40, the data has been deleted.

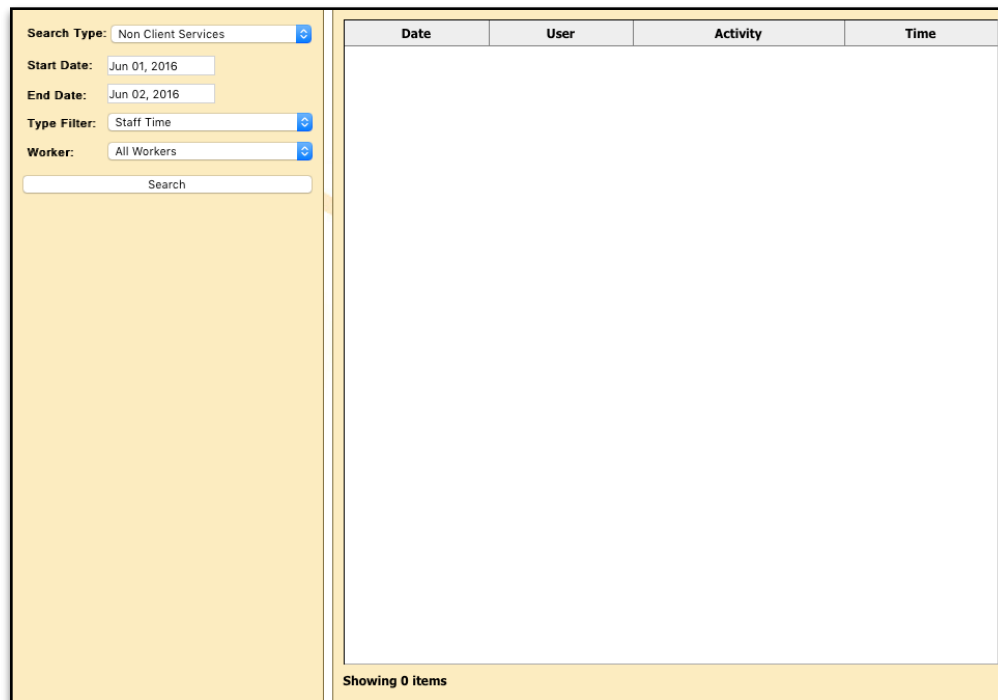


Figure 40 - Reviewing Non Client Services Module After Deletion

Searching Information & Referral

1. To search for information & referral data, change the **Search Type** to **Information & Referral** as shown in Figure 41.

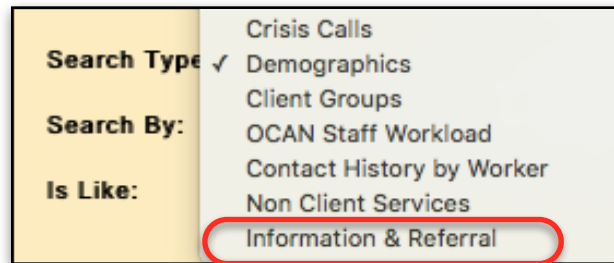


Figure 41 - Changing Search Type to “Information & Referral”

2. Upon changing the Search Type, the CRMS Search Engine interface will change as demonstrated in Figure 42.

A screenshot of the CRMS Search Engine interface. It features a yellow background with several search filters: 'Search Type' (set to 'Information & Referral'), 'Start Date' (Jun 02, 2016), 'End Date' (Jun 02, 2016), 'Program' (All Programs), and 'Worker' (All Workers). Each filter has a dropdown arrow. At the bottom, there is a white 'Search' button.

Figure 42 - Information & Referral Services Search Interface

3. Modify the search parameters as necessary using the available date, type and worker filters.
4. Once satisfied with the search criteria, click **Search** as seen in Figure 43.

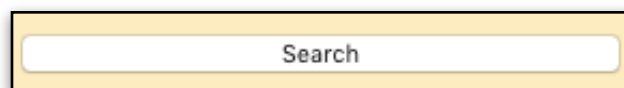


Figure 43 - Searching for Information & Referral Data

5. The Information & Referral module will then refresh and display any data which matches the inputted search criteria.
6. This is demonstrated on the following page on Figure 44.

Date	Time	Worker	Client	Duration	Program
Mon May 02 2016	Regular Hours	Christian Gosselin	Kauffman, Alex (04055415-01)	20	Addictions
Wed Dec 09 2015	Regular Hours	Christian Gosselin		15	Addictions
Wed Nov 11 2015	Regular Hours	Christian Gosselin		60	Case Management
Thu Aug 27 2015	Regular Hours	Christian Gosselin		30	Case Management
Thu Aug 27 2015	Regular Hours	Christian Gosselin		45	Addictions
Thu Jul 09 2015	Regular Hours	Christian Gosselin		60	Case Management
Mon Jun 22 2015	Regular Hours	Christian Gosselin		30	Addictions
Wed Feb 11 2015	Regular Hours	Christian Gosselin		30	Addictions
Mon Oct 20 2014	After Hours	Christian Gosselin		45	Case Management
Tue Sep 02 2014	Regular Hours	Christian Gosselin		20	Addictions
Fri Aug 22 2014	Regular Hours	Christian Gosselin		35	Addictions
Thu Aug 21 2014	Regular Hours	Christian Gosselin		30	Addictions
Fri Aug 15 2014	Regular Hours	Christian Gosselin		30	Addictions
Wed Jul 23 2014	After Hours	Marko Palikko		30	Addictions
Thu Jul 17 2014	Regular Hours	Christian Gosselin		20	Addictions
Thu Jul 17 2014		Marko Palikko		15	Case Management
Thu Jul 17 2014	After Hours	Marko Palikko		20	Case Management
Thu Jul 17 2014	Regular Hours	Marko Palikko		15	Addictions
Thu Jul 17 2014	After Hours	Marko Palikko		10	Case Management
Showing 30 items					

Figure 44 - Reviewing Information & Referral Data

Creating a New Information & Referral Entry

1. Refer to page 122 for how to create a new Information & Referral entry with either a registered client, or page 124 for a non-registered service recipient.

Modifying Information & Referral Data

1. Refer to page 32 above for how to access the **Information & Referral Search Type** on the CRMS Search Engine.

Search Type: Information & Referral

Start Date: Jun 02, 2016

End Date: Jun 02, 2016

Program: All Programs

Worker: All Workers

Search

Figure 45 - Information & Referral Services Search Interface

2. Modify the search parameters as necessary - in Figure 45 on preceding page a user is searching for data between June 2, 2016 and June 2, 2016 for 'All Workers' and 'All Programs'.
3. The CRMS Search Engine will return any data which matches the search parameters.

Date	Time	Worker	Client	Duration	Program	Contact Type	
Thu Jun 02 2016	After Hours	Christian Gosselin		30	Case Management		Information

Figure 46 - Reviewing Information & Referral Data

4. **Click** on the desired non client services entry to bring up the "Entity Actions" menu. Click **View I & R** as seen in Figure 47.



Figure 47 - Modifying Information & Referral Data

5. The Information & Referral Dialog will then appear on screen as shown in Figure 48.

The image shows a dialog box titled "Information & Referral" with a close button (X) in the top right corner. The dialog contains several fields for editing referral data:

- Date: Jun 02, 2016
- Program: Supported Housing
- Duration: 30
- Language: English
- Gender: Male
- Caller Description: Friend
- Reason: Information on services
- Related To: Housing
- Diagnosis: Personality Disorder (e.g., Borderline, Sch)
- Referred From: Family or Friend
- Referred To: Ottawa Mobile Crisis
- Note: Provided details regarding our services.
- Time: After Hours
- Area/City: Kingston
- Age Group: Youth
- Contact Type: Telephone
- Culture:
- Phone:
- Num. Participants: 1
- On behalf of Non-Registered Service Recipient: ☒

At the bottom right of the dialog, there are "Save" and "Cancel" buttons.

Figure 48 - Editing Information & Referral Data

6. Modify the data as necessary, and when satisfied click **Save** to finalize the process.

Deleting Information & Referral Data

1. Refer to page 32 above for how to access the **Information & Referral Search Type** on the CRMS Search Engine.
2. Modify the search parameters as necessary.
3. The CRMS Search Engine will return any data which matches the search parameters.

Date	Time	Worker	Client	Duration	Program	Contact Type	
Thu Jun 02 2016	After Hours	Christian Gosselin		30	Case Management	Information	

Figure 49 - Reviewing Information & Referral Data

4. **Click** on the desired non client services entry to bring up the “Entity Actions” menu. Click **Delete I & R** as seen in Figure 50.

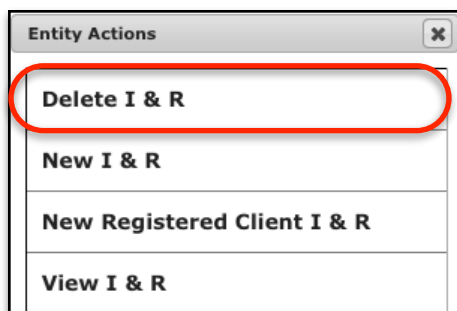


Figure 50 - Deleting Information & Referral Data

5. A confirmation dialog will be presenting allow the user to cancel if desired. If the data is meant to be deleted, click **Yes** to finalize the process.

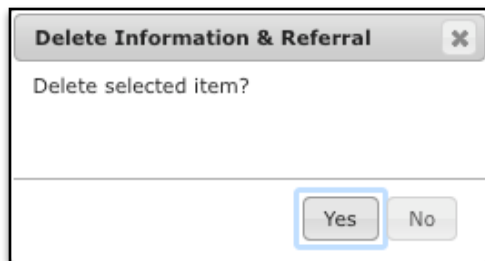


Figure 51 - Deleting Information & Referral Data

6. A message box will appear confirming the process was successful (see following page).



Figure 52 - Successfully Deleted Information & Referral Data

7. Click **Search** on the CRMS Search Engine to refresh the search results.
8. As can be seen in Figure 53, the data has been deleted.

Date	Time	Worker	Client	Duration	Program	Contact Type	Reason
------	------	--------	--------	----------	---------	--------------	--------

Showing 0 items

Figure 53 - Reviewing Information & Referral Module After Deletion

Searching Follow Up's

1. To search for Follow Ups, change the **Search Type** to **Follow Ups** as shown in Figure 54.

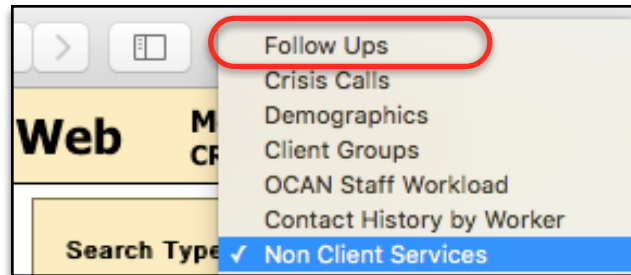


Figure 54 - Changing Search Type to "Follow Ups"

2. Upon changing the Search Type, the CRMS Search Engine interface will change as demonstrated in Figure 55.

A screenshot of the 'Follow Ups' search interface. It features a yellow background with several search filters: 'Search Type' (set to 'Follow Ups'), 'Start Date' (set to 'Jun 02, 2016'), 'End Date' (set to 'Jun 15, 2016'), 'Program' (set to 'All Programs'), and 'Assigned To' (set to 'All Workers'). Each filter has a dropdown arrow on its right side.

Figure 55 - Follow Ups Search Interface

3. Modify the search parameters as necessary using the available date, type and worker filters.
4. Once satisfied with the search criteria, click **Search** as seen in Figure 56.

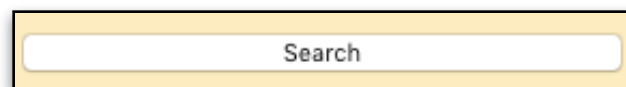


Figure 56 - Searching for Follow Ups

5. The Follow Ups module will then refresh and display any data which matches the inputted search criteria.
6. This is demonstrated on the following page on Figure 57.

Call Date: June 15, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 13, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 11, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 9, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 8, 2016	Client: Kauffman, Alex (04055415-02)	
Contact Type: Consult	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Perform a consultation with Alex and verify his CDS statuses. Ensure he has ...		
Call Date: June 7, 2016	Client: Kauffman, Alex (04055415-02)	
Contact Type: Consult	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Perform a consultation with Alex and verify his CDS statuses. Ensure he has ...		
Call Date: June 7, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 6, 2016	Client: Kauffman, Alex (04055415-02)	
Contact Type: Consult	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason:		
Showing 14 follow ups		

Figure 57 -Reviewing Follow Ups



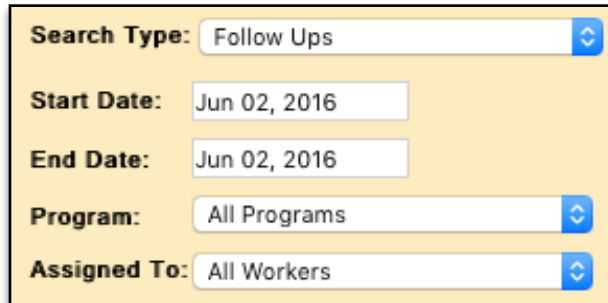
TIPS AND TRICKS - The Follow Up Module allows for use of custom colour codes to help the user distinguish the type of data. This is further shown in Figure 58. Note the use of the same colour in Figure 58 as the module has yet to be configured.

	Alert
	Consult
	Assessment
	Referral
	Follow Up
	In Progress
	Complete

Figure 58 - Follow Up Colour Codes

Performing a Follow Up

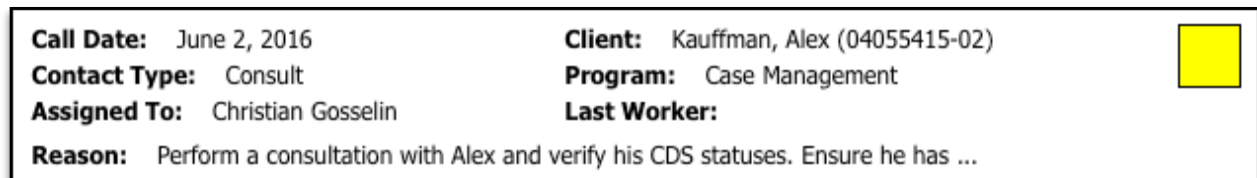
1. In order to perform a follow up, refer to page 37 above for how to access the **Follow Up Search Type**.
2. In Figure 59, a user is searching for follow ups which have been scheduled for June 2, 2016 for 'All Workers' and 'All Programs'.



A search criteria form with a yellow background. It contains five fields: 'Search Type' with a dropdown menu showing 'Follow Ups'; 'Start Date' with a text box containing 'Jun 02, 2016'; 'End Date' with a text box containing 'Jun 02, 2016'; 'Program' with a dropdown menu showing 'All Programs'; and 'Assigned To' with a dropdown menu showing 'All Workers'. Each dropdown menu has a blue arrow icon on the right.

Figure 59 - Searching for a Follow Up

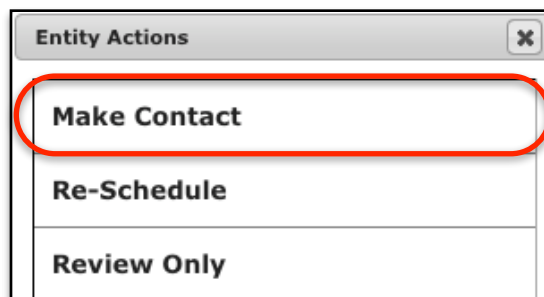
3. Click **Search** to locate the desired follow up. Figure 60 demonstrates a follow up which the has user located.



A summary box for a follow up. It contains the following information: 'Call Date: June 2, 2016', 'Contact Type: Consult', 'Assigned To: Christian Gosselin', 'Client: Kauffman, Alex (04055415-02)', 'Program: Case Management', 'Last Worker:', and 'Reason: Perform a consultation with Alex and verify his CDS statuses. Ensure he has ...'. There is a yellow square icon on the right side.

Figure 60 - Locating a Follow Up

4. Upon locating the desired follow up, **click** on it to bring up the “Entity Actions” menu as seen below in Figure 61.



An 'Entity Actions' dialog box with a close button (X) in the top right corner. It contains three buttons: 'Make Contact', 'Re-Schedule', and 'Review Only'. The 'Make Contact' button is highlighted with a red oval.

Figure 61 - Performing a Follow Up

5. Click **Make Contact** as seen above in Figure 61.
6. The Follow Up Dialog will then appear on screen as seen in Figure 62 (see following page).

Follow Up - Kauffman, Alex (04055415-02) - Case Management

2016-06-02

Reason: Perform a consultation with Alex and verify his CDS statuses. Ensure he has all the support necessary.

Type: Consult **Status:**

Worker: Christian Gosselin **Phone:**

Date: Jun 02, 2016 **Time:**

Office: **Location:** School

Program: Case Management **Issue:**

Modality: Telephone ☐ Indirect **Non-Reg:** 0

Participants: ☒ Individual ☐ Group ☐ Police ☐ Doctor ☐ Lawyer

Focus:

Notes

Save Lock In Progress

Figure 62 - Follow Up Dialog

7. The Follow Up Dialog is separated into 4 sections. Refer to Figure 62 above and the table below which outlines these sections.

Section	Purpose
1	The "Concurrent Documentation" section. As the user attempts to complete the Follow Up, subsequent attempts to reach the client will appear in this list for easy review. As can be seen currently in Figure 62 above, only 1 attempt to complete this follow up has been made.
2	The reason for the follow up, along with the details particular to it. The type, worker, status and phone number along with the reason for the follow up.
3	The "Contact" section where the user can input the details of the interaction with the client, or any indirect activity which might of occurred during the attempt to complete the follow up.
4	The "Case Note section" where the user can input and type the details relating to their particular interaction during the attempt to complete the follow up.

8. Fill out the **Status** field as shown in Figure 63.

Reason: Perform a consultation with Alex and verify his CDS statuses. Ensure he has all the support necessary.

Type: Consult

Worker: Christian Gosselin

Status: No Answer

Phone:

Figure 63 - Filling Out Follow Up Status

9. Fill out the **Contact Details** for the Follow Up as demonstrated in Figure 64. Note in Figure 64 the user has flagged this contact as '**Indirect**' and has **unchecked** the 'Individual' participant from the contact (as it was a 'No Show').

Date: Jun 02, 2016

Time:

Office: Kingston

Location: School

Program: Case Management

Issue: Other

Modality: Telephone

Participants:

- ☐ Individual
- ☐ Group
- ☐ Police
- ☐ Doctor
- ☒ Lawyer

☒ Indirect

Non-Reg: 0

No Show		
	5	

Figure 64 - Inputting Contact Details for the Follow Up

10. Fill out the **Note Details** for the Follow Up as shown in Figure 65.

Focus: Appointments

Notes: Was unable to reach Alex over the telephone today at the pre-scheduled time. Will wait a little while before attempting to reach him again.

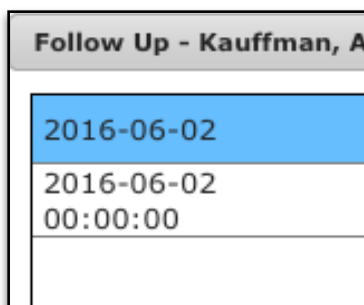
Figure 65 - Inputting Note Details for the Follow Up

11. When satisfied with the details, click **Save**.

Save

Figure 66 - Saving Follow Up

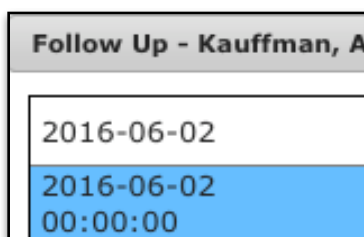
12. The Concurrent Documentation section of the Follow Up dialog will automatically refresh as shown in Figure 67.



Follow Up - Kauffman, A	
2016-06-02	
2016-06-02	00:00:00

Figure 67 - Successfully Saved Follow Up

13. Note in Figure 67 above, there are now two rows in the Follow Up Dialog.
14. The software has automatically chosen the “new” row allowing the user to thereby continue documenting in the Follow Up dialog with this client if desired.
15. Alternatively, a user can quickly review/modify the previous follow up entry by selecting the previous row.
16. This is demonstrated in Figure 68 below.



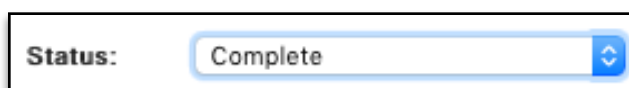
Follow Up - Kauffman, A	
2016-06-02	
2016-06-02	00:00:00

Figure 68 - Selecting Previous Follow Up Interaction

17. The Follow Up Dialog will then load the previously saved interaction.
18. Or a user could close the Follow Up Dialog if desired and continue working on another task.

Completing a Follow Up

1. Once the user has performed the necessary task for the Follow Up, it can be marked as **Completed**.
2. Refer to page 37 above for how to locate the desired Follow Up.
3. Change the Follow Up Status field to **Complete** as shown below.



Status: Complete

Figure 69 - Marking a Follow Up as Complete

4. Click **Save** to finalize the process.
5. The Follow Up Dialog will then close. Refresh the CRMS Search Engine to confirm the follow up has been marked as 'Complete'.
6. As can be seen in Figure 70 below, the follow up has been marked as complete as indicative by the **green** icon.

Call Date: June 2, 2016	Client: Kauffman, Alex (04055415-02)	
Contact Type: Consult	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker: Christian Gosselin	
Reason: Perform a consultation with Alex and verify his CDS statuses. Ensure he has ...		

Figure 70 - Follow Up Marked As 'Complete'

Rescheduling a Follow Up



*****UNDER CONSTRUCTION***** - This section is under construction.
Please contact CRMS Support to determine if an update is available.

Viewing a Follow Up As 'Review Only'

1. It may be necessary at times to simply review the Follow Up details, but not modify it.
2. Refer to page 37 above for how to locate the desired follow up.
3. Click on the desired follow to bring up the "Entity Actions" menu, and select **Review Only**.

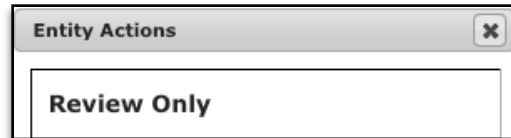
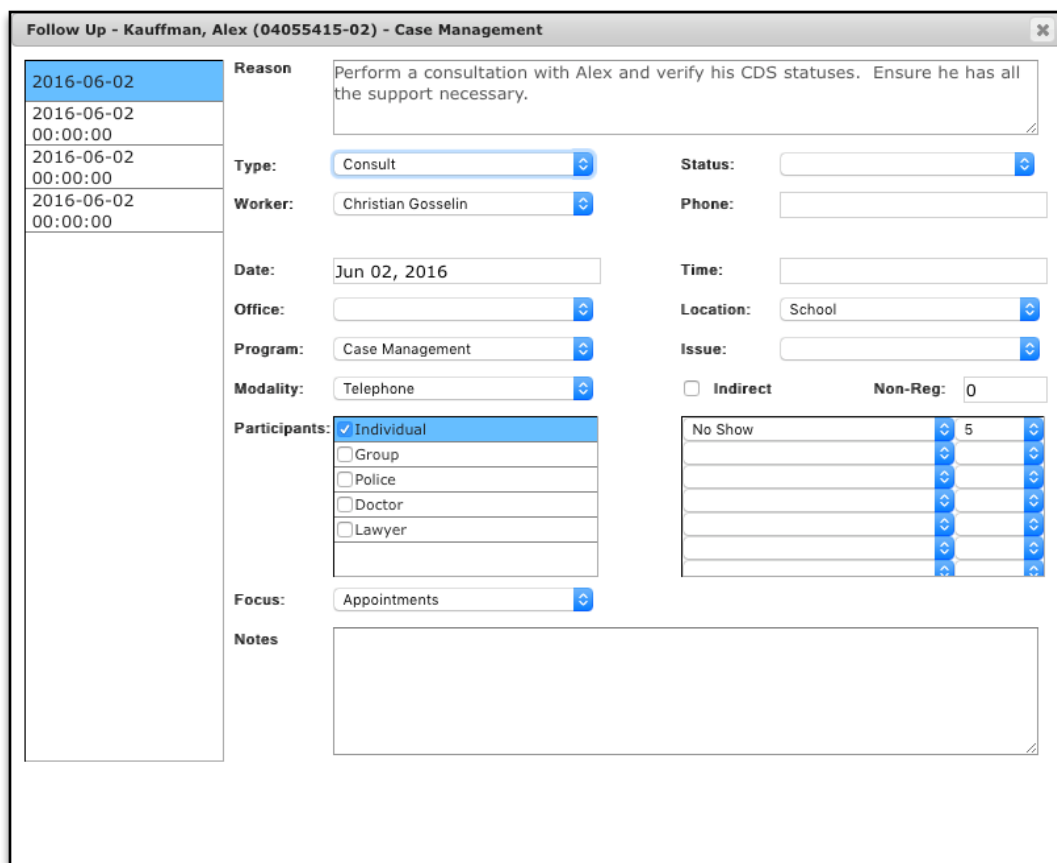


Figure 71 - Review Only

4. The Follow Up Dialog will then appear as shown in Figure 72.

A screenshot of the "Follow Up - Kauffman, Alex (04055415-02) - Case Management" dialog box. The dialog is divided into several sections. On the left, there is a list of dates: "2016-06-02", "2016-06-02 00:00:00", "2016-06-02 00:00:00", and "2016-06-02 00:00:00". The main area contains fields for "Reason", "Type", "Worker", "Date", "Office", "Program", "Modality", "Participants", "Focus", and "Notes". The "Reason" field contains the text: "Perform a consultation with Alex and verify his CDS statuses. Ensure he has all the support necessary." The "Type" field is set to "Consult". The "Worker" field is set to "Christian Gosselin". The "Date" field is set to "Jun 02, 2016". The "Office" field is empty. The "Program" field is set to "Case Management". The "Modality" field is set to "Telephone". The "Participants" section has a list of checkboxes: "Individual" (checked), "Group", "Police", "Doctor", and "Lawyer". The "Focus" field is set to "Appointments". The "Notes" field is empty. On the right side, there are fields for "Status", "Phone", "Time", "Location", "Issue", and "Indirect". The "Status" field is empty. The "Phone" field is empty. The "Time" field is empty. The "Location" field is set to "School". The "Issue" field is empty. The "Indirect" checkbox is unchecked. The "Non-Reg" field is set to "0". At the bottom right, there is a table with the following data:

No Show		
	5	

Figure 72 - Follow Up Dialog in Review Only Mode

5. Note the absence of save buttons in Figure 72, as the Follow Up is in Review Mode.

Searching OCAN Workload

1. To search for OCAN Assessments, change the **Search Type** to **OCAN Staff Workload** as shown in Figure 73.

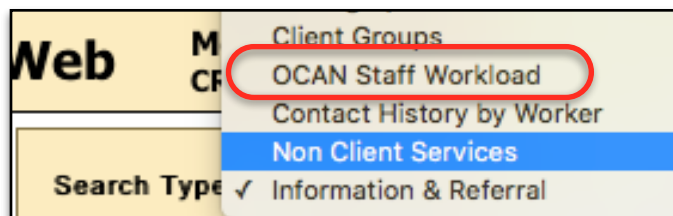


Figure 73 - Changing Search Type to “OCAN Staff Workload”

2. Upon changing the Search Type, the CRMS Search Engine interface will change as demonstrated in Figure 74.

A screenshot of the search interface. It has a light beige background. At the top, there is a label 'Search Type:' followed by a dropdown menu showing 'OCAN Staff Workload'. Below this is a label 'Worker:' followed by a dropdown menu showing 'All Workers'. At the bottom, there is a checkbox labeled 'Active Only:' which is checked.

Figure 74 - OCAN Staff Workload Search Interface

3. Modify the search parameters as necessary using the filters.
4. Once satisfied with the search criteria, click **Search** as seen in Figure 75.

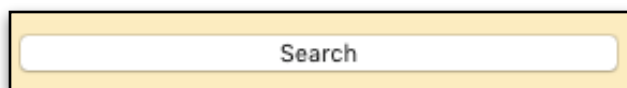


Figure 75 - Searching for OCAN Staff Workload

5. The OCAN Staff workload module will then refresh and display any data which matches the inputted search criteria.
6. In Figure 76 below, a user is searching for their OCAN Workload.

A screenshot of the search interface, similar to Figure 74. It has a light beige background. At the top, there is a label 'Search Type:' followed by a dropdown menu showing 'OCAN Staff Workload'. Below this is a label 'Worker:' followed by a dropdown menu showing 'Christian Gosselin'. There is no checkbox visible in this screenshot.

Figure 76 - Searching for OCAN Staff Workload for a Worker

7. Figure 77 (see following page) demonstrates the search results.

Azulay, Nanci (00000122.01)			
Type	ID	Start/Complete	Reason
OCAN 2.0	000129	October 3, 2011	
Colbert, Stephen (04050133-01)			
Type	ID	Start/Complete	Reason
OCAN 2.0	000085	June 2, 2011	Initial OCAN
OCAN 2.0	000098	June 7, 2011	
OCAN 2.0	000115	July 14, 2011	
Gareau, Kelsey (04050237.01)			
Type	ID	Start/Complete	Reason
OCAN 2.0	000023	September 29, 2010 - September 29, 2010	Initial OCAN
Kauffman, Alex (04055415-02)			
Type	ID	Start/Complete	Reason
OCAN 2.0	000297	June 1, 2016	Initial OCAN
Marley, Bob (04050161-01)			
Type	ID	Start/Complete	Reason
OCAN 2.0	000071	March 24, 2011	
OCAN 2.0	000133	October 3, 2011	
Miller, Janet (00000121.00)			
Type	ID	Start/Complete	Reason
OCAN 2.0	000052	March 2, 2011 - March 2, 2011	Initial OCAN
OCAN 2.0	000053	March 2, 2011	Initial OCAN
Smyth, Dean (00000105.01)			
Type	ID	Start/Complete	Reason
OCAN 2.0	000140	October 3, 2011	
Showing 11 clients			

Figure 77 - OCAN Staff Workload Search Results

Changing an OCAN Staff Workload

1. Refer to page 45 above for how to access the **OCAN Staff Workload Search Type**.
2. Locate the desired assessment.
3. **Click** on it to bring up the “Entity Actions” menu.

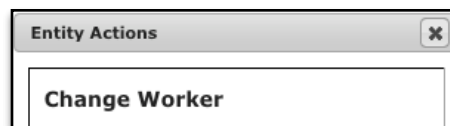


Figure 78 - Change Worker

4. Click **Change Worker**. The “Change Worker” Dialog will then appear.

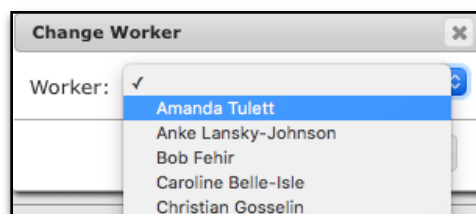
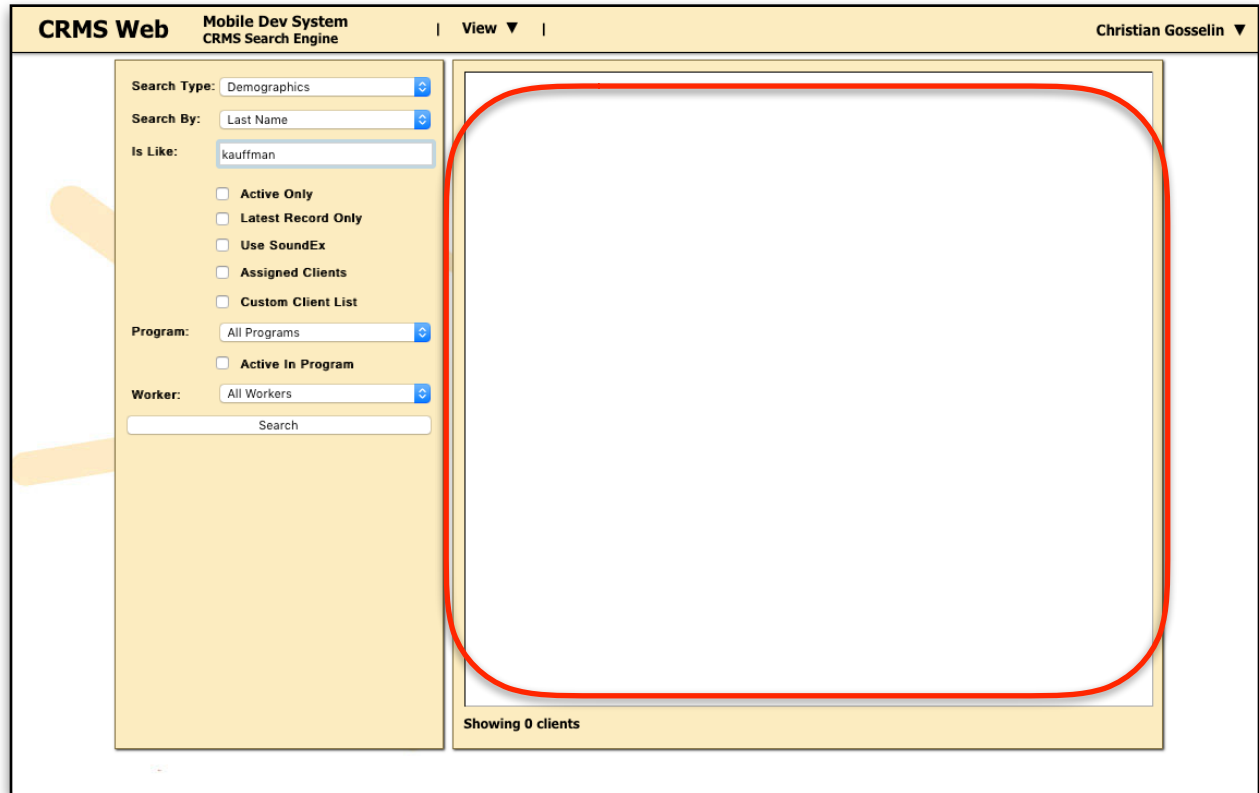


Figure 79 - Change Worker

5. Pick the desired name, and click **Ok** to finalize the process. A message box will confirm that the process was successful.

Creating a New Client

1. Prior to creating a new client, refer to page 17 above “Searching Demographics” in order to ensure the client file doesn’t already exist in CRMS.



The screenshot shows the CRMS Web interface. The top navigation bar includes 'CRMS Web', 'Mobile Dev System', 'CRMS Search Engine', a 'View' dropdown, and the user 'Christian Gosselin'. The left sidebar contains search filters: 'Search Type' (Demographics), 'Search By' (Last Name), 'Is Like' (kauffman), and checkboxes for 'Active Only', 'Latest Record Only', 'Use SoundEx', 'Assigned Clients', and 'Custom Client List'. Below these are 'Program' (All Programs) and 'Worker' (All Workers) dropdowns, and a 'Search' button. The main content area is empty, with a red border highlighting it. At the bottom of this area, it says 'Showing 0 clients'.

Figure 80 - Searching Prior to Creating a New Client

2. As shown in Figure 80, a search returned 0 results for any files matching the last name 'kauffman' ensuring search filters are properly configured.
3. Click anywhere in the area identified by a red border in Figure 80 to bring up the “Entity Actions” menu (shown in Figure 81 on following page).



****TIPS AND TRICKS* - Enable the SoundEx to perform a phonetic lookup to ensure a file doesn't exist with a similar spelling.***

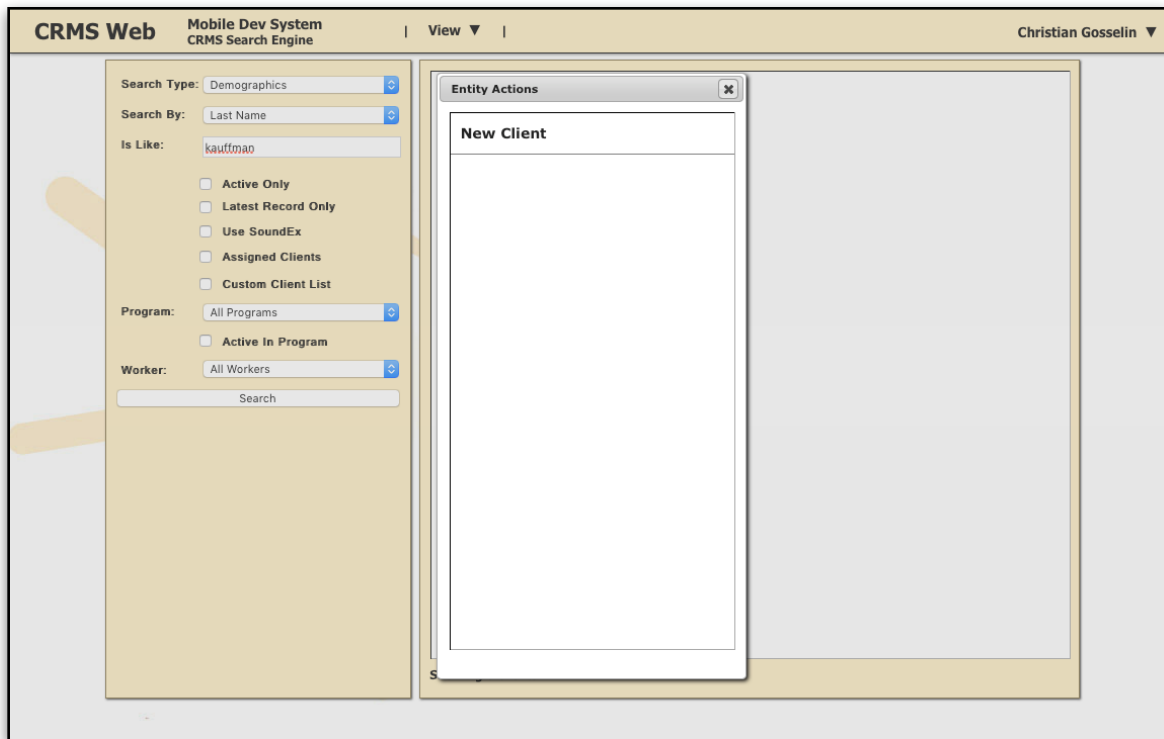


Figure 81 - Creating a New Client

4. Click **New Client** to bring up the new client dialog illustrated in Figure 82.

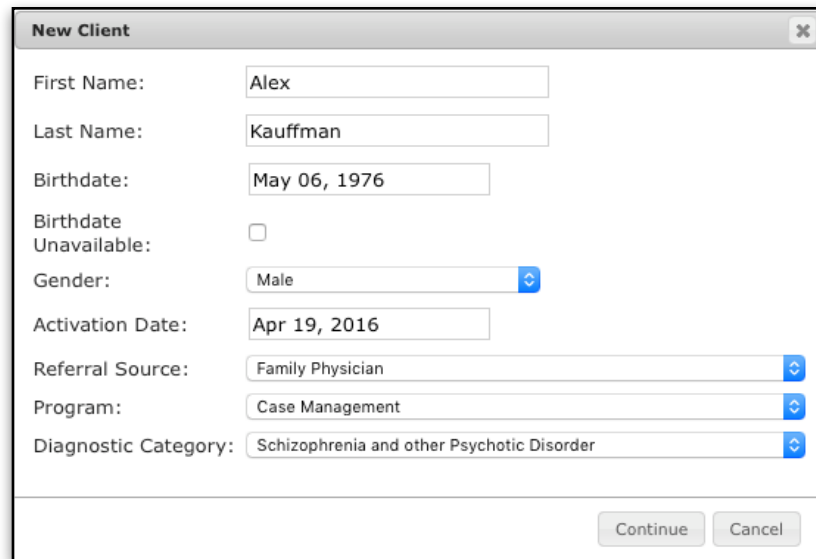
The 'New Client' dialog box contains the following fields and options:

- First Name:
- Last Name:
- Birthdate:
- Birthdate Unavailable: ☐
- Gender:
- Activation Date:
- Referral Source:
- Program:
- Diagnostic Category:

At the bottom right, there are 'Continue' and 'Cancel' buttons.

Figure 82 - New Client Dialog

5. Fill out as much information as possible. Once satisfied, click **Continue** to finalize the process. Figure 83 demonstrates the New Client dialog prior to clicking Continue.



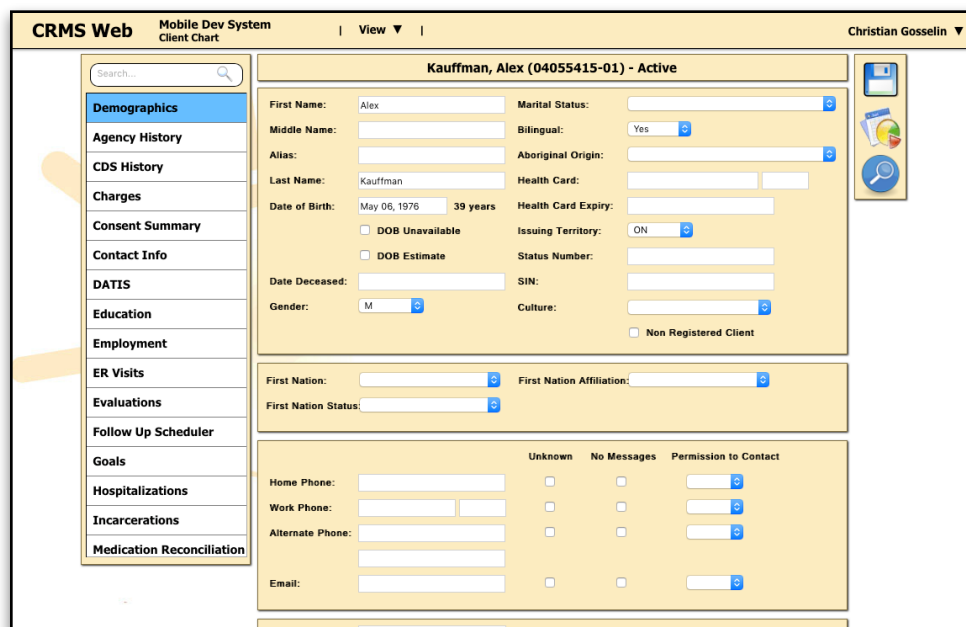
The 'New Client' dialog box contains the following fields and values:

Field	Value
First Name:	Alex
Last Name:	Kauffman
Birthdate:	May 06, 1976
Birthdate Unavailable:	☐
Gender:	Male
Activation Date:	Apr 19, 2016
Referral Source:	Family Physician
Program:	Case Management
Diagnostic Category:	Schizophrenia and other Psychotic Disorder

Buttons: Continue, Cancel

Figure 83 - Creating a New Client

6. The newly created client file will then appear on screen as demonstrated in Figure 84.



The 'CRMS Web' interface shows the client file for 'Kauffman, Alex (04055415-01) - Active'. The left sidebar lists various tabs, with 'Demographics' selected. The main content area displays the following information:

Kauffman, Alex (04055415-01) - Active	
First Name:	Alex
Middle Name:	
Alias:	
Last Name:	Kauffman
Date of Birth:	May 06, 1976 39 years
☐ DOB Unavailable	
☐ DOB Estimate	
Date Deceased:	
Gender:	M
Marital Status:	
Bilingual:	Yes
Aboriginal Origin:	
Health Card:	
Health Card Expiry:	
Issuing Territory:	ON
Status Number:	
SIN:	
Culture:	
☐ Non Registered Client	
First Nation:	
First Nation Affiliation:	
First Nation Status:	
Home Phone:	☐ Unknown ☐ No Messages ☐ Permission to Contact
Work Phone:	☐ ☐ ☐
Alternate Phone:	☐ ☐ ☐
Email:	☐ ☐ ☐

Figure 84 - Newly Created Client File

Viewing a Client

1. Refer to section “Searching Demographics” on page 17 for instructions on how to perform a client search.
2. Upon locating the client in the search results, click on their name to bring up the Entity Actions menu shown in Figure 85.

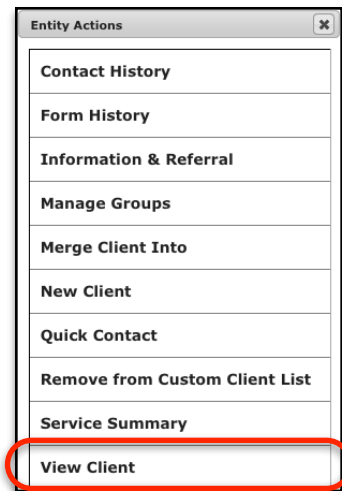


Figure 85 - Viewing Client

3. Click on **View Client** to open the client file.

Using the Client Shortcut

1. To rapidly access other areas of the software, simply click on the area identified below in Figure 86 to bring up the “**Entity Actions**” menu as demonstrated above in Figure 85.

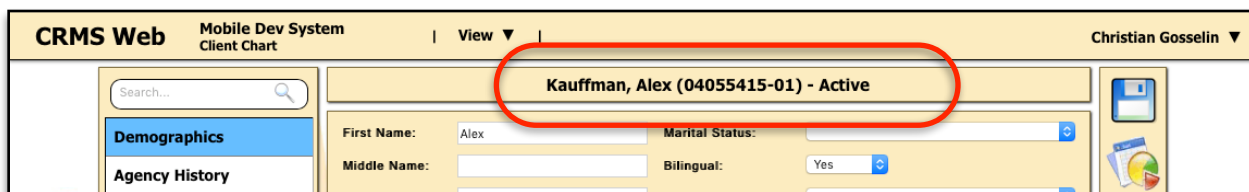


Figure 86 - Using the Client Shortcut

2. This allows staff to rapidly navigate across an entire client chart without having to return to the CRMS Search Engine.
3. This client shortcut is available in all client related modules : ie., Forms History, Contact History, Client Information, etc.,

Using the Client Identification

1. To access the Client Identification module, locate the client file using the CRMS Search Engine as described above in page 16.
2. From the Demographics page, click on the blue **magnifying glass** as identified in Figure 87 below.

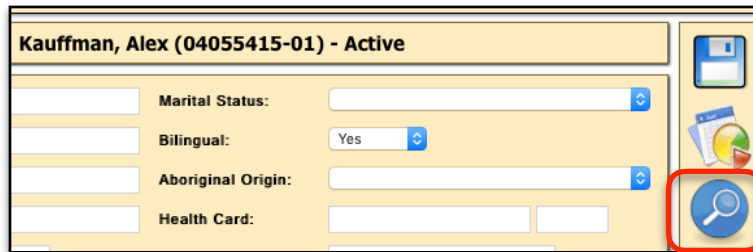
A screenshot of a software interface for a client named 'Kauffman, Alex (04055415-01) - Active'. The interface has a yellow header bar with the client's name. Below the header, there are four rows of form fields: 'Marital Status:', 'Bilingual:' (with a dropdown set to 'Yes'), 'Aboriginal Origin:', and 'Health Card:'. To the right of these fields is a vertical toolbar containing icons for a folder, a document, a pie chart, and a magnifying glass. The magnifying glass icon is highlighted with a red square.

Figure 87 - Accessing Client Identification Module

3. The Client Identification module will appear on screen as shown in Figure 88.

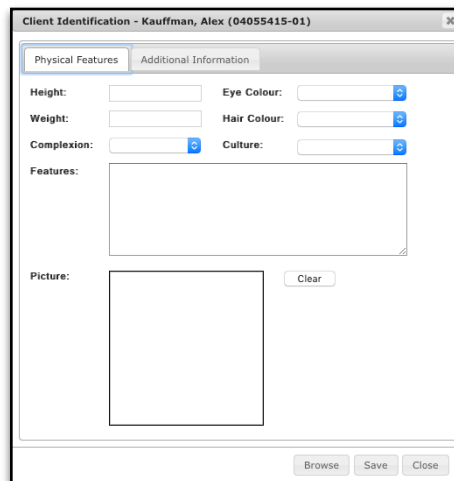
A screenshot of the 'Client Identification - Kauffman, Alex (04055415-01)' window. The window has two tabs: 'Physical Features' (selected) and 'Additional Information'. Under 'Physical Features', there are fields for 'Height:', 'Weight:', 'Complexion:', 'Eye Colour:', 'Hair Colour:', and 'Culture:'. Below these are a 'Features:' text area and a 'Picture:' image placeholder with a 'Clear' button. At the bottom are 'Browse', 'Save', and 'Close' buttons.

Figure 88 - Client Identification Module

4. Figure 89 shows the Client Identification being filled out.

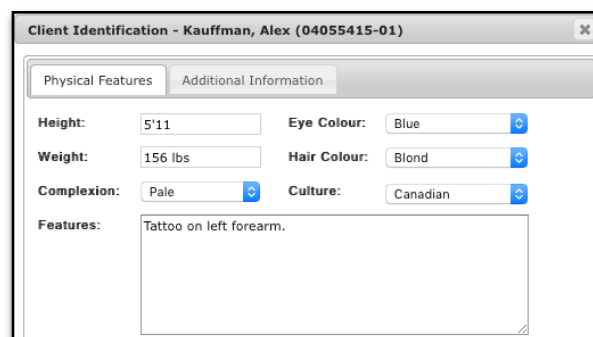
A screenshot of the 'Client Identification - Kauffman, Alex (04055415-01)' window, showing the 'Physical Features' tab filled out. The 'Height:' field contains '5'11', 'Weight:' contains '156 lbs', 'Complexion:' has a dropdown set to 'Pale', 'Eye Colour:' has a dropdown set to 'Blue', 'Hair Colour:' has a dropdown set to 'Blond', and 'Culture:' has a dropdown set to 'Canadian'. The 'Features:' text area contains the text 'Tattoo on left forearm.'.

Figure 89 - Filling out Client Identification Module

5. Once satisfied, remember to click **Save** to finalize the process.

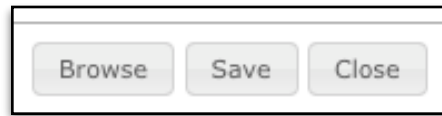


Figure 90- Saving Client Identification

Adding a Client Picture

1. To add a client picture, access the Client Identification module as described above in page 51.
2. Click on **Browse** as identified by Figure 91.



Figure 91 - Adding Client Picture

3. The software will then prompt the user to select their picture as demonstrated on the following page in Figure 92.

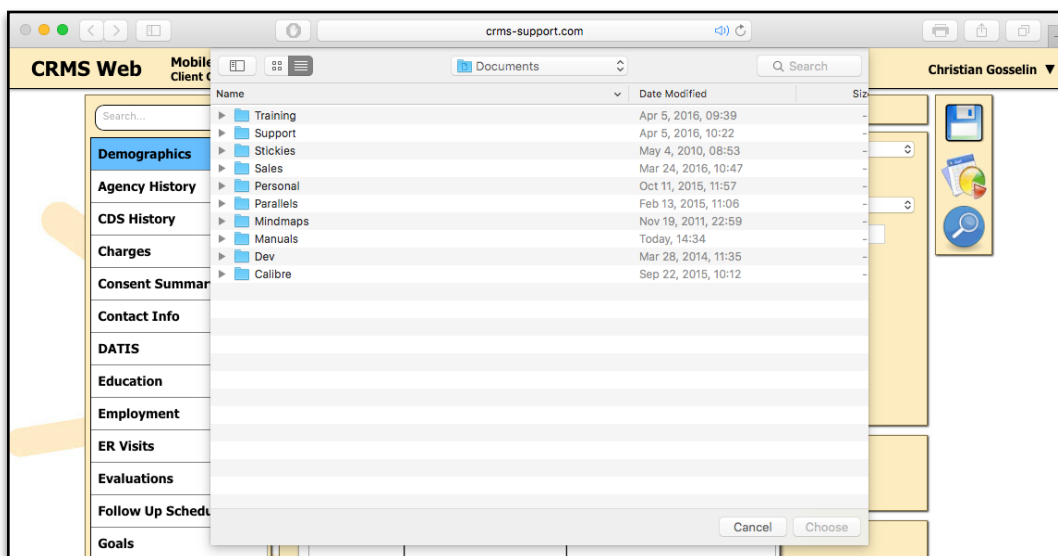


Figure 92- Selecting Client Picture

4. Navigate on your computer to locate the desired client file. Click **Choose** once satisfied to upload the picture to the client file.
5. A confirmation message will appear to advise the user that the operation was successful.

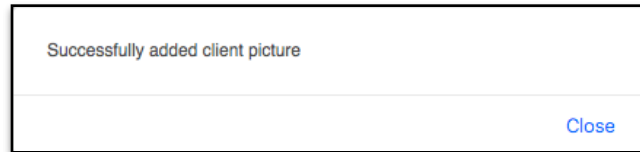


Figure 93 - Successfully Added Client Picture

6. Figure 94 illustrates the Client Identification module once the client picture has been added.

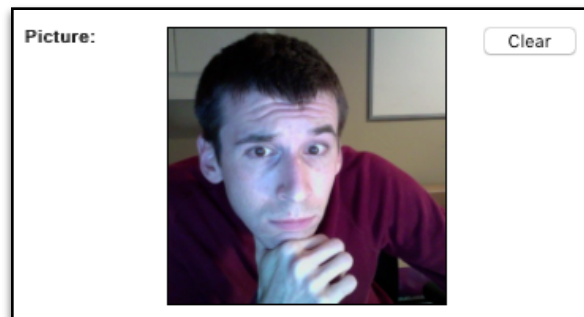


Figure 94 - Reviewing Client Picture

Clearing a Client Picture

1. To clear a client picture, access the Client Identification module as described above on page 51.
2. Click **Clear** as shown in Figure 95.

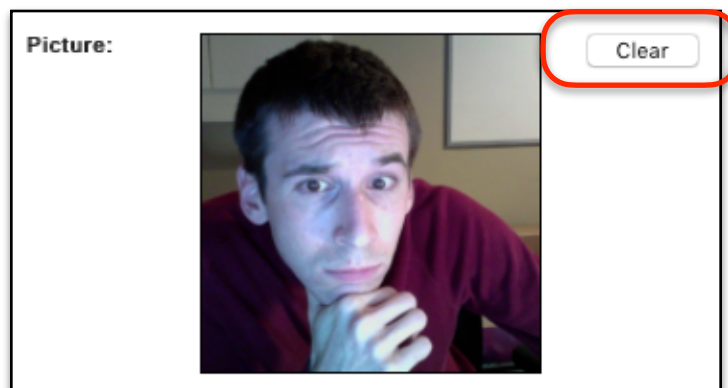


Figure 95 - Clearing Client Picture

3. A confirmation message will appear to advise the user that the operation was successful.

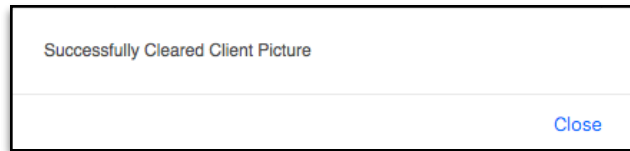


Figure 96 - Successfully Cleared Client Picture

Accessing Additional Information

1. To access the Additional Information tab, open the Client Identification module as described above on page 51.
2. Click on the **Additional Information** tab. This is demonstrated in Figure 97.
3. The Additional Information module allows users to document transportation methods, vaccines, type, and medical/physical status.

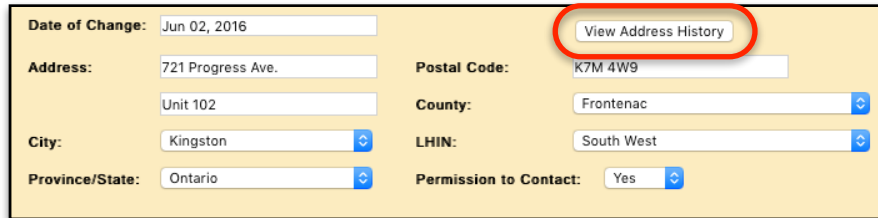
A screenshot of a software window titled 'Client Identification - Kauffman, Alex (04055415-01)'. The window has a tabbed interface with two tabs: 'Physical Features' and 'Additional Information'. The 'Additional Information' tab is selected and highlighted with a blue border. Below the tabs, there are four labeled text input areas: 'Transportation Methods:', 'Vaccines:', 'Type:', and 'Medical/Physical Status:'. Each label is followed by a large, empty rectangular text box. At the bottom of the window, there are three buttons: 'Browse', 'Save', and 'Close'.

Figure 97 - Client Identification - Additional Information Module

4. Once satisfied with the changes, click **Save** to finalize the process.

Viewing Address History

1. Refer to section “Searching Demographics on page 17 for instructions on how to perform a client search.
2. Upon locating the client in the search results, click on their name to bring up the Entity Actions.
3. Click on **View Client** to open the client file.
4. Scroll to the “Address” section of the client chart. Click on **View Address History** as shown below.



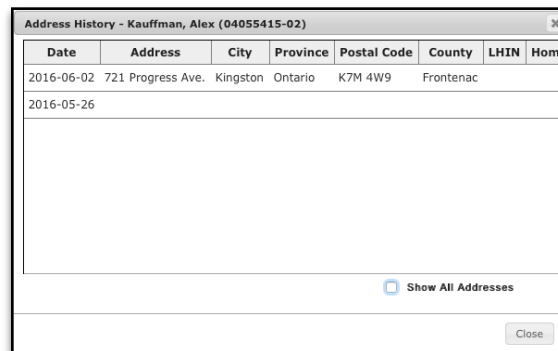
The screenshot shows a client address form with the following fields:

- Date of Change: Jun 02, 2016
- Address: 721 Progress Ave.
- Postal Code: K7M 4W9
- Unit 102
- County: Frontenac
- City: Kingston
- LHIN: South West
- Province/State: Ontario
- Permission to Contact: Yes

The "View Address History" button is circled in red.

Figure 98 - Viewing Address History

5. The Address History Dialog will then appear.



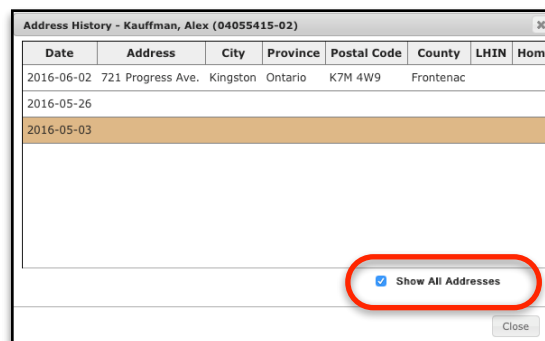
The Address History Dialog for Alex Kauffman (04055415-02) displays a table with the following data:

Date	Address	City	Province	Postal Code	County	LHIN	Home
2016-06-02	721 Progress Ave.	Kingston	Ontario	K7M 4W9	Frontenac		
2016-05-26							

At the bottom of the dialog, there is a checkbox labeled "Show All Addresses" and a "Close" button.

Figure 99 - Address History Dialog

6. Note in Figure 100 that there is a **Show All Addresses** checkmark. This allows for rapid review across all the referrals for a clients' file.



The Address History Dialog for Alex Kauffman (04055415-02) displays a table with the following data:

Date	Address	City	Province	Postal Code	County	LHIN	Home
2016-06-02	721 Progress Ave.	Kingston	Ontario	K7M 4W9	Frontenac		
2016-05-26							
2016-05-03							

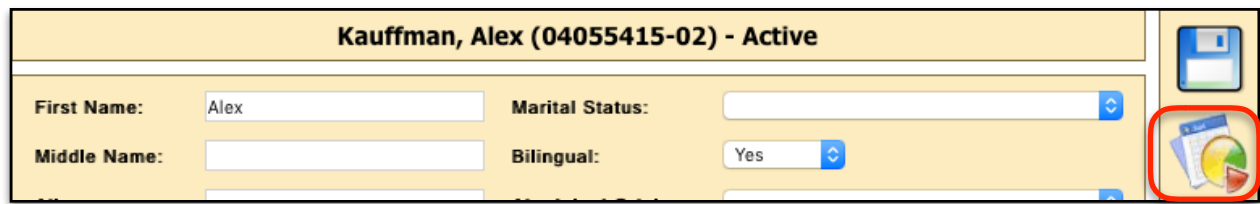
At the bottom of the dialog, the "Show All Addresses" checkbox is checked and circled in red. A "Close" button is also present.

Figure 100 - Address History Dialog

Printing a Client File

If necessary, a user can print off aspects of a client chart.

1. Refer to section “Searching Demographics on page 17 for instructions on how to perform a client search.
2. Upon locating the client in the search results, click on their name to bring up the Entity Actions.
3. Click on **View Client** to open the client file.
4. Click on the **Reports** button identified in Figure 101.



Kauffman, Alex (04055415-02) - Active

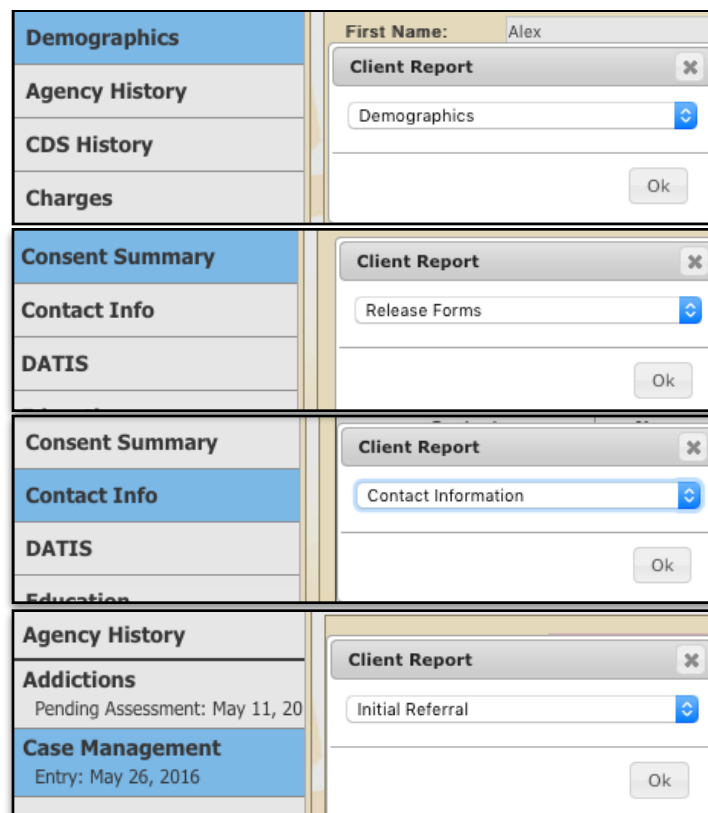
First Name: Alex Marital Status: [Dropdown]

Middle Name: [Dropdown] Bilingual: Yes [Dropdown]

Reports button (highlighted with a red circle)

Figure 101 - Printing a Client File

5. Depending on the module from which the user clicked the “Reports” button, different choices might appear. This is illustrated in Figure 102.



Module	Client Report Option
Demographics	Demographics
Consent Summary	Release Forms
Contact Info	Contact Information
Agency History	Initial Referral

Figure 102 - Each Module Offer Different Print Options

6. Once the user has selected the desired print out, click **Ok**. The software will then generate a **PDF** copy of the print out.

CRMS Web - Mobile Dev System - Client Chart 10.186.40.29/crms/index.php

CRMS Software

Mobile Dev System

Initial Referral

Client Number: 04055415-02
Chart Number:

1. Client Information Name: Kauffman, Alex DOB: 1976-05-06 Address: 721 Progress Ave., Unit 102 Kingston Ontario K7M 4W9 Health Card:	2. Emergency Contact Information Name: Julie Kauffman Address: Home Phone: 613 562 3162 Work Phone: 613 856 9530
3. Reason for Referral Please attach medical/psychiatric history, laboratory investigations and medication, if applicable.	
4. Referred By: Name: Agency: Community Mental Health Agency Phone: Ext:	
5. Interim Instructions/Contacts/Appointments	
6. Other Services Involved	

Figure 103 - Printing a Client File

Adding a New Program

1. To add a new program, locate the client file using the CRMS Search Engine as described on page 17.
2. Access the **Agency History** module as shown in Figure 104.

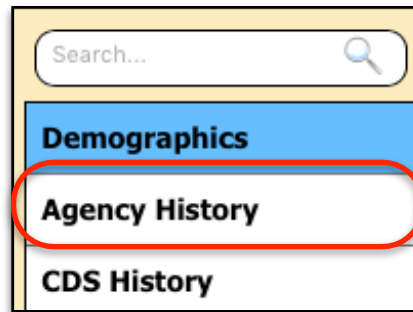


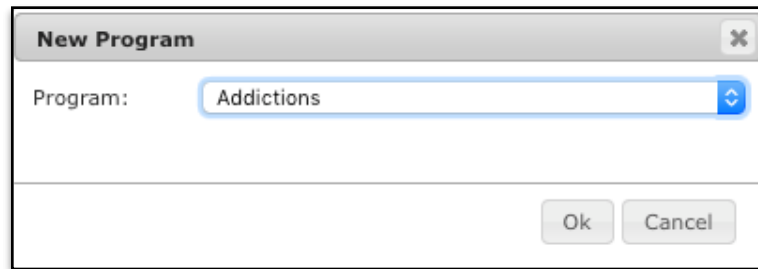
Figure 104 - Accessing Agency History

3. The Agency History module will then be loaded. To add a new program, click the green plus icon as identified in Figure 105.

A screenshot of the 'CRMS Web' interface. The top header bar contains 'CRMS Web', 'Mobile Dev System Client Chart', a 'View' dropdown, and the user name 'Christian Gosselin'. The left sidebar has a 'Back' button and two menu items: 'Agency History' (highlighted with a blue bar) and 'Case Management' (with a sub-item 'Entry: Apr 19, 2016'). The main content area is titled 'Kauffman, Alex (04055415-01) - Active'. It contains several form fields: 'Referral Source' (set to 'Family Physician'), 'Address', 'Activation Date' (set to 'Apr 19, 2016'), 'Diagnostic Category' (set to 'Schizophrenia and other Psychotic Dis'), 'Age of onset for mental illness' (set to 'NA'), 'Age of first hospitalization' (set to 'NA'), 'Referred By', 'Phone', 'Ext', 'Email', and 'Reason for Initial Referral into agency'. Below these is a 'Common Data Set Evaluation' section with a magnifying glass icon. At the bottom are 'MIS Exit Status' and 'MIS Exit Date' fields. A checkbox labeled 'Show All' is at the bottom left. In the top right corner of the main form area, there is a vertical toolbar with icons for a folder, a document, and a green plus icon, which is circled in red.

Figure 105 - Adding a New Program

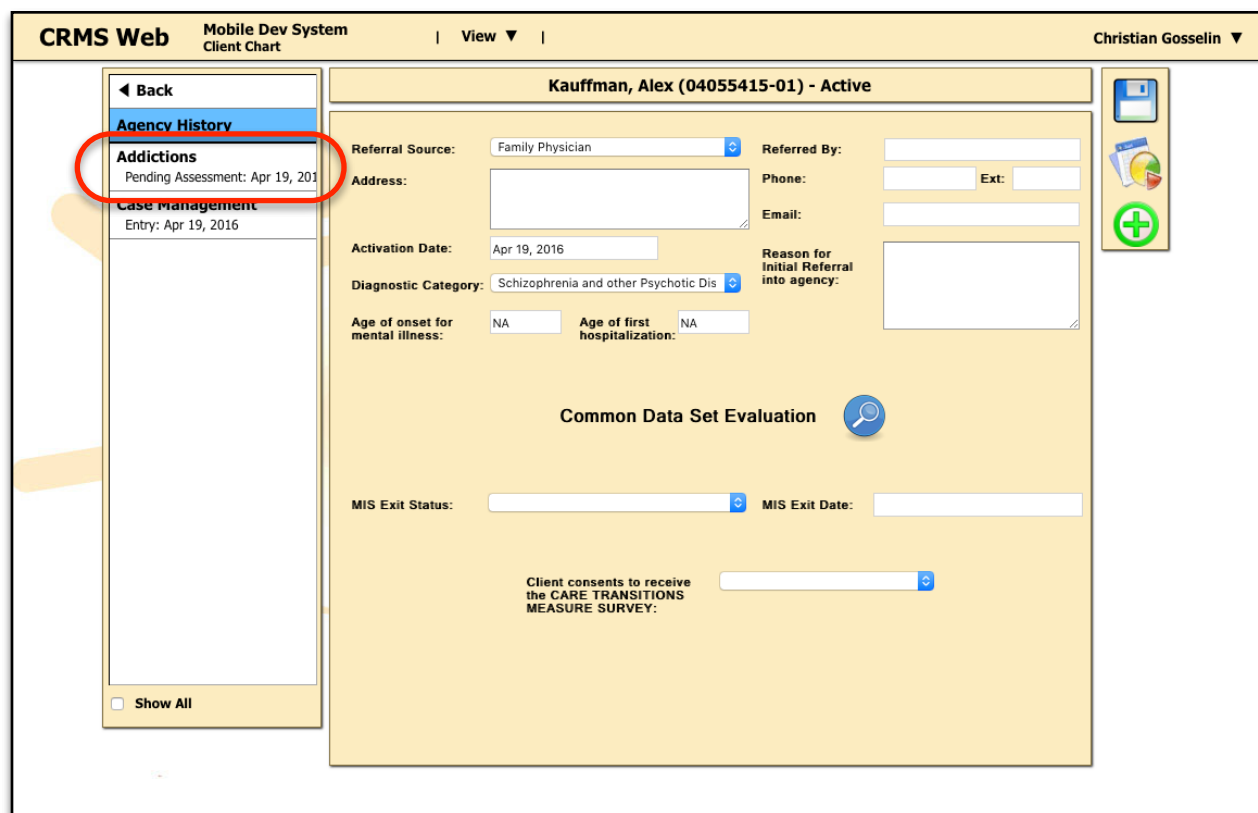
4. The **New Program** dialog will then be displayed as shown below in Figure 106.



The 'New Program' dialog box is shown. It has a title bar with a close button. Inside, there is a label 'Program:' followed by a dropdown menu currently showing 'Addictions'. At the bottom right, there are 'Ok' and 'Cancel' buttons.

Figure 106 - New Program Dialog

5. Select the desired program from the drop down choices, and click **Ok** to finalize the process.
6. The Agency History list will automatically refresh and the new program will appear in the list as shown in Figure 107.



The screenshot shows the 'CRMS Web' interface. On the left is a sidebar with a 'Back' button and a list: 'Agency History' (highlighted with a red circle), 'Addictions' (with subtext 'Pending Assessment: Apr 19, 2016'), and 'Case Management' (with subtext 'Entry: Apr 19, 2016'). At the bottom of the sidebar is a 'Show All' checkbox. The main area is titled 'Kauffman, Alex (04055415-01) - Active'. It contains various form fields: 'Referral Source' (Family Physician), 'Address' (empty), 'Activation Date' (Apr 19, 2016), 'Diagnostic Category' (Schizophrenia and other Psychotic Dis), 'Age of onset for mental illness' (NA), 'Age of first hospitalization' (NA), 'Referred By' (empty), 'Phone' (empty), 'Ext' (empty), 'Email' (empty), and 'Reason for Initial Referral into agency' (empty). Below these is a 'Common Data Set Evaluation' section with a magnifying glass icon. Further down are 'MIS Exit Status' and 'MIS Exit Date' fields. At the bottom, there is a checkbox for 'Client consents to receive the CARE TRANSITIONS MEASURE SURVEY:'. On the right side of the main area, there are icons for a folder, a document, and a green plus sign.

Figure 107 - Successfully Added New Program

7. Click on the newly created program to review. Figure 108 (see following page) demonstrates the Program Page.

CRMS Web Mobile Dev System Client Chart | View ▼ | Christian Gosselin ▼

Kauffman, Alex (04055415-01) - Active

Pending Assessment: Apr 19, 2016

Worker: Christian Gosselin

Secondary Worker: 0

Other Worker: 0

Referral Source:

Reason:

Diagnostic Category: Schizophrenia and other Psychotic Disord

Presenting Issues:

- ☒ Threat to Others/Attempted Suicide
- ☒ Specific symptoms of serious mental illness
- ☒ Physical/Sexual Abuse
- ☒ Educational
- ☒ Occupational/Employment/Vocational

CTO **Court Orders**

Preferred Language:

Highest Level of Education:

Language Delivery:

Priority:

Intake Assessment: **Reason:**

Start Delay of Service: **Reason:**

Un-Pending Date: **Closed on Intake:** **Reason:**

☐ Show All

Figure 108 - Program Page

8. The Program page guides the user through the process of collecting baseline CDS data.
9. As can be seen in Figure 109 below, the “Entry Date” transaction is currently not available as the user has not inputted the “Intake Assessment” date.

Intake Assessment: **Reason:**

Start Delay of Service: **Reason:**

Un-Pending Date: **Closed on Intake:** **Reason:**

Figure 109 - Entry Date Transaction Not Visible

10. Once the user inputs the “Intake Assessment” date, the “Entry Date” transaction will become available. This is demonstrated in Figure 110 on the following page.

Intake Assessment:	Apr 20, 2016	Reason:	
Start Delay of Service:		Reason:	
Un-Pending Date:		Closed on Intake:	
		Reason:	
Entry Date:		Reason:	
		Legal Status:	
		Living Arrangements	
		Residence Type	
		Residence Status	
		Employment	
		Primary Income	
		Education Status	

Figure 110 - "Entry Date" Transaction Now Available

11. The same concept is applied to the "Exit Date" transaction. Once the "Entry Date" has been inputted, the "Exit Date" becomes available as in shown in Figure 111.

Entry Date:	Apr 20, 2016	Reason:	
		Legal Status:	
		Living Arrangements	
		Residence Type	
		Residence Status	
		Employment	
		Primary Income	
		Education Status	
Exit Date:		Reason:	
		Exit Disposition:	
		Primary Referral To:	

Figure 111 - "Exit Date" Transaction Now Available

Creating a Quick Contact

1. In order to create a quick contact, refer to the section above “CRMS Search Engine” on page 17 to locate the desired client file.
2. Alternatively, if the client file is already open, click on the Client Shortcut in order to access the Entity Actions menu as demonstrated in Figure 112. Click on **Quick Contact**.

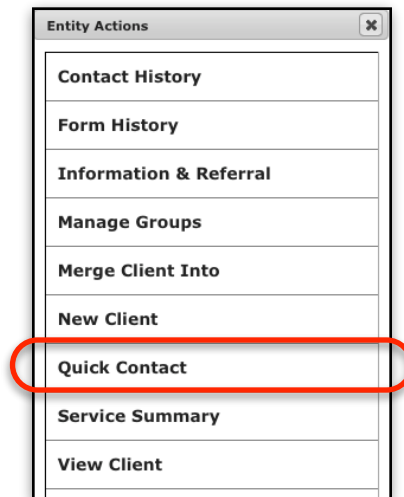


Figure 112 - Creating a Quick Contact

3. The Quick Contact Dialog will then appear on screen as shown in Figure 113.

A screenshot of the 'Quick Contact - Kauffman, Alex (4055415)' dialog box. The dialog contains several fields and sections:

- Contact Date:** Apr 20, 2016
- Time:** 09:00
- Program:** (dropdown menu)
- Worker:** Christian Gosselin (dropdown menu)
- Modality:** (dropdown menu)
- Contact Location:** School (dropdown menu)
- Issue Type:** (dropdown menu)
- Office Location:** Oak Centre (dropdown menu)
- Indirect:** ☐
- Secondary Worker:** ☐
- Participants:** A list with checkboxes for Individual (checked), Group, Police, Doctor, Lawyer, and Non Registered. To the right of this list is a table with 6 rows and 2 columns of dropdown menus.
- Non Reg.:** 0
- Focus:** (text field)
- Note:** (text area)
- Buttons:** Save and Cancel at the bottom right.

Figure 113 - Quick Contact Dialog

4. Fill out the necessary fields on the Quick Contact Dialog. This is illustrated in Figure 114 below.

Quick Contact - Kauffman, Alex (4055415)

Contact Date: Apr 20, 2016 Time: 09:00

Program: Addictions Worker: Christian Gosselin

Modality: Face to Face Contact Location: School

Issue Type: Other Office Location: Oak Centre

☐ Indirect ☐ Secondary Worker

Participants:

- ☒ Individual
- ☐ Group
- ☐ Police
- ☐ Doctor
- ☐ Lawyer
- ☐ Non Registered

Assessment		
	30	0.50

Non Reg.: 0 0.50 hours

Focus: OCAN Assessment

Note: Performed an OCAN assessment with Alex.

Save Cancel

Figure 114 - Creating a Quick Contact

5. Once satisfied, click **Save** to finalize the process. A confirmation message will appear as shown in Figure 115.

Successfully saved contact

Close

Figure 115 - Successfully Saved Quick Contact

Modifying a Contact

1. In order to modify a previously saved contact, first locate the desired client using the “CRMS Search Engine” as described on page 17.
2. Alternatively, if the client file is already open, click on the Client Shortcut in order to access the Entity Actions menu as demonstrated in Figure 116.

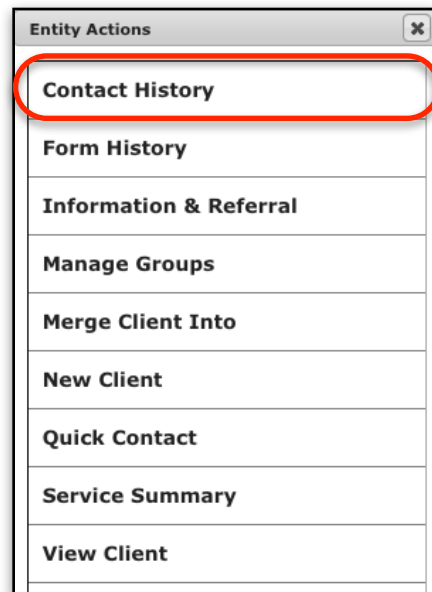


Figure 116 - Accessing Contact History

3. The Contact History module will then be loaded as shown in Figure 117.

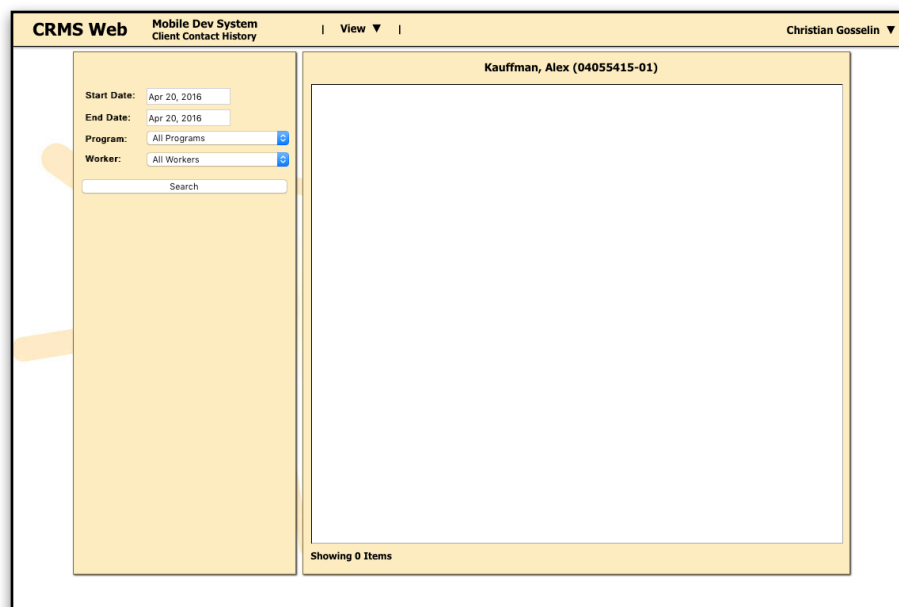
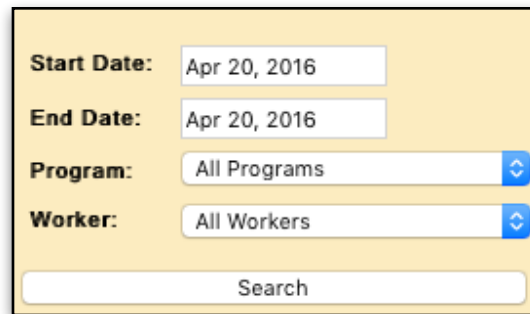


Figure 117- Contact History

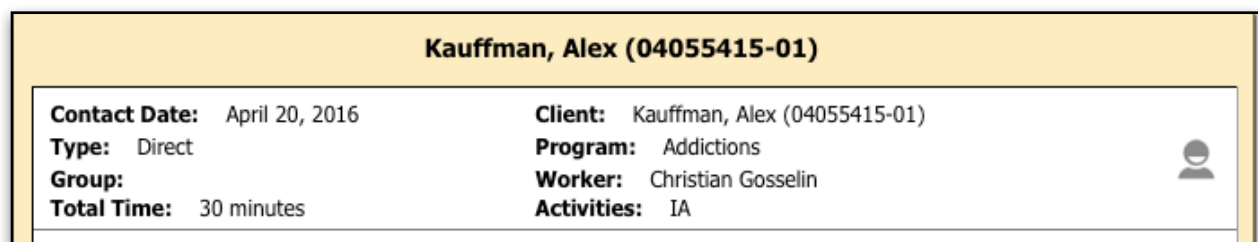
- Adjust the search parameters as necessary, and click **Search** once satisfied. Figure 118 demonstrates the search parameters.



A search parameters form with a yellow background. It contains four input fields: 'Start Date' with 'Apr 20, 2016', 'End Date' with 'Apr 20, 2016', 'Program' with 'All Programs', and 'Worker' with 'All Workers'. Each field has a blue dropdown arrow on the right. Below these fields is a white 'Search' button.

Figure 118- Using Search Parameters to Locate a Contact

- If a contact occurred with the selected client within the date range, it will be then loaded into the review section as shown in Figure 119.



A contact history review section for 'Kauffman, Alex (04055415-01)'. It displays contact details in two columns. The left column shows 'Contact Date: April 20, 2016', 'Type: Direct', 'Group:', and 'Total Time: 30 minutes'. The right column shows 'Client: Kauffman, Alex (04055415-01)', 'Program: Addictions', 'Worker: Christian Gosselin', and 'Activities: IA'. A small person icon is visible on the right side.

Figure 119 - Locating a Contact Using Contact History

- Click on the desired contact to bring up the Entity Actions menu.
- Click on **View Contact** as shown in Figure 120 to edit the previously saved contact.



An 'Entity Actions' menu window with a title bar and a close button. It contains three options: 'Contact', 'Quick Contact', and 'View Contact'. The 'View Contact' option is highlighted with a red oval.

Figure 120 - Editing Contact

- Figure 121 on the following page shows the contact being edited.

9. As can be seen in Figure 121 below, the user is editing the duration from 30 minutes to 45 minutes.

The screenshot shows a web form titled "Contact - Kauffman, Alex (4055415)". The form contains several fields: "Contact Date" (Apr 20, 2016), "Time" (09:00), "Program" (Addictions), "Worker" (Christian Gosselin), "Modality" (Face to Face), "Contact Location" (School), "Issue Type" (Other), and "Office Location" (Oak Creek). There are also checkboxes for "Indirect" and "S... Worker". A "Participants" section has checkboxes for "Individual" (checked), "Group", "Police", "Doctor", "Lawyer", and "Non Registered". A "Non Reg.:" field shows "0". A table with "Assessment" as the header has a row with a checkmark and "0.50". A dropdown menu is open over the "0.50" value, showing a list of numbers from 5 to 115 in increments of 5. The number "45" is highlighted in blue. A "Cancel" button is visible at the bottom right.

Figure 121 - Editing Previously Saved Contact

10. Once satisfied with the changes, click **Save** to finalize the process. A message will appear confirming the change was successful.

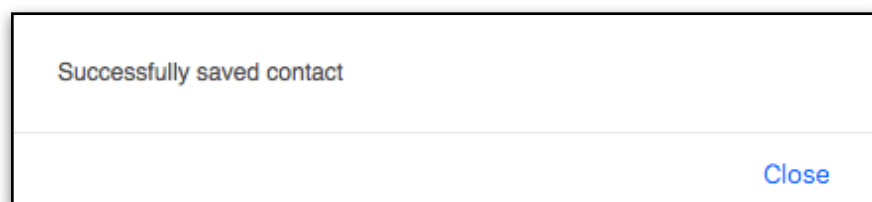


Figure 122 - Successfully Modified Contact

11. The Contact History module will automatically refresh after saving the changes.
Figure 123 demonstrates the refreshed Contact History module.

Kauffman, Alex (04055415-01)

Contact Date: April 20, 2016	Client: Kauffman, Alex (04055415-01)
Type: Direct	Program: Addictions
Group:	Worker: Christian Gosselin
Total Time: 45 minutes	Activities: IA

Figure 123 - Reviewing Modified Contact

Creating a Contact (without Note Body)

1. Should a user desire to create a contact, without the associate case note, they can use the contact history.
2. Refer to the section “Contact History” on page 64 for instructions on how to open the Contact History module.
3. Click anywhere in the area identified in Figure 124 to bring up the Entity Actions menu.

CRMS Web Mobile Dev System Client Contact History | View | Christian Gosselin

Kauffman, Alex (04055415-01)

Start Date: Apr 20, 2016
End Date: Apr 20, 2016
Program: All Programs
Worker: All Workers
Search

Showing 0 Items

Figure 124 - Creating a Contact

4. Click on **Contact** as shown in Figure 125.

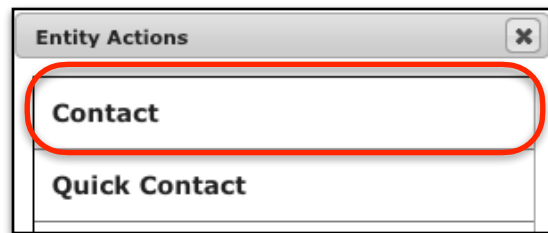
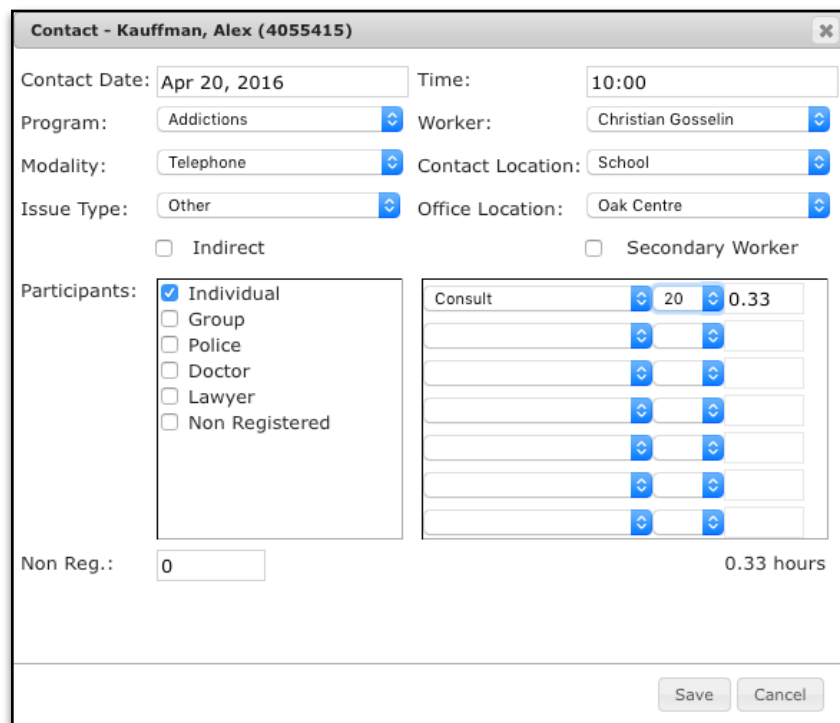


Figure 125 - Creating a Contact

5. The Contact Dialog will appear as demonstrated below in Figure 126. Fill out as required.

A screenshot of a software dialog box titled "Contact - Kauffman, Alex (4055415)". It contains various fields and checkboxes for creating a contact. The fields include "Contact Date" (Apr 20, 2016), "Time" (10:00), "Program" (Addictions), "Worker" (Christian Gosselin), "Modality" (Telephone), "Contact Location" (School), "Issue Type" (Other), and "Office Location" (Oak Centre). There are checkboxes for "Indirect" and "Secondary Worker". A "Participants" section has a list of roles: Individual (checked), Group, Police, Doctor, Lawyer, and Non Registered. To the right of the participants list is a table with columns for "Consult", "20", and "0.33". At the bottom, there is a "Non Reg.:" field with the value "0" and a "0.33 hours" label. "Save" and "Cancel" buttons are at the bottom right.

Consult	20	0.33

Figure 126 - Creating a Contact

6. Click **Save** to finalize the process. A message will appear confirming the contact was successfully saved.



Figure 127 - Successfully Saved Contact

7. The Contact History will then automatically refresh to show the newly created contact. This is demonstrated in Figure 128.

The screenshot shows the CRMS Web interface. The top navigation bar includes 'CRMS Web', 'Mobile Dev System Client Contact History', a 'View' dropdown, and the user name 'Christian Gosselin'. The left sidebar contains filters: 'Start Date' (Apr 21, 2016), 'End Date' (Apr 21, 2016), 'Program' (All Programs), and 'Worker' (All Workers), with a 'Search' button. The main panel displays contact details for 'Kauffman, Alex (04055415-01)'. The details include: 'Contact Date: April 21, 2016', 'Type: Direct', 'Group: ', 'Total Time: 15 minutes', 'Client: Kauffman, Alex (04055415-01)', 'Program: Addictions', 'Worker: Christian Gosselin', and 'Activities: CNF'. A large empty box below the details is labeled 'Showing 1 contacts'.

Figure 128 - Reviewing Contact History

Forms History

1. In order to create form or note, refer to the section above “CRMS Search Engine” on page 17 to locate the desired client file.
2. Alternatively, if the client file is already open, click on the Client Shortcut in order to access the Entity Actions menu as demonstrated in Figure 129. Click on **Forms History**.

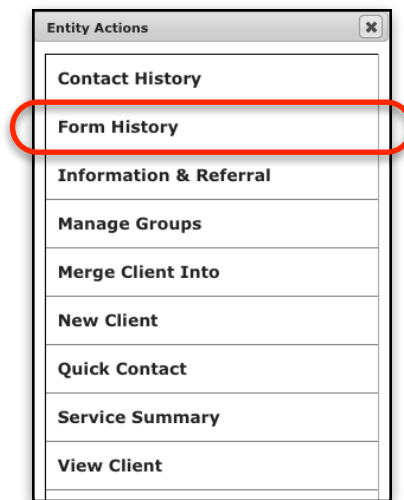


Figure 129 - Accessing Forms History

3. The Forms History module will then be loaded on screen.

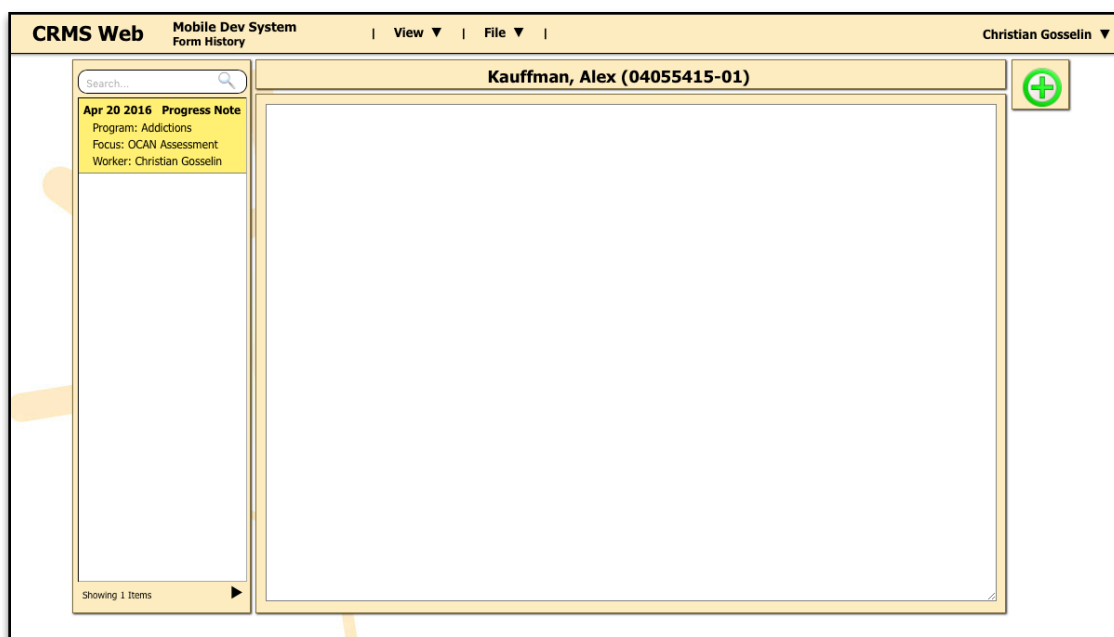


Figure 130 - Forms History Module

Creating a New Form

1. There are two methods for creating a new form : users can click on the **File** menu and select **New Form** as identified below. Alternatively, users can also click on the **green plus** also highlighted below.

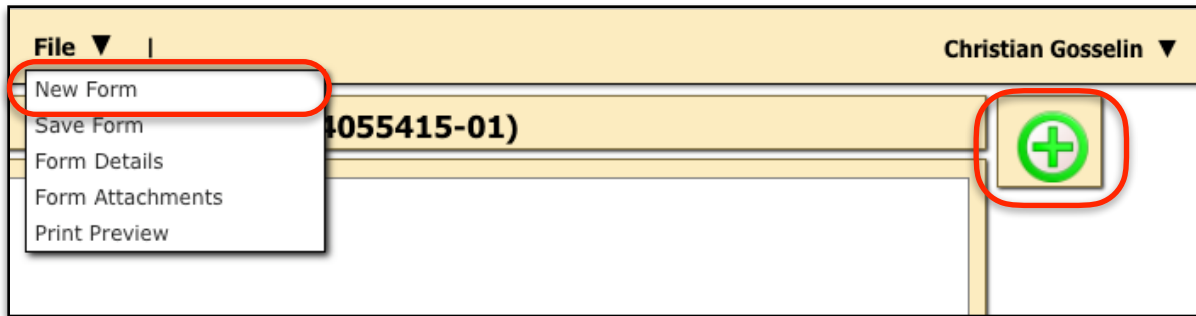


Figure 131 - Creating a New Form

2. The **New Form** dialog will then appear on screen as shown in Figure 132.

A screenshot of a 'New Form' dialog box. The dialog has a title bar with 'New Form' and a close button. Inside, there are several fields: 'Type:' with a dropdown menu, 'Program:' with a dropdown menu, 'Incident Date:' with a text field containing 'Apr 21, 2016', 'Focus:' with a dropdown menu, and 'Worker:' with a dropdown menu containing 'Christian Gosselin'. At the bottom right, there are 'Ok' and 'Cancel' buttons.

Figure 132 - New Form Dialog

3. From the **Type** drop down, select the desired form.
4. Select the program and incident date and a focus if possible.
5. Once satisfied, click **Ok** to begin filling out the new form. Figure 133 (see following page) demonstrates filling out a new form.

CRMS Web Mobile Dev System Form History | View ▼ | File ▼ | Christian Gosselin ▼

Kauffman, Alex (04055415-01)

Search...

Apr 20 2016 Progress Note
 Program: Addictions
 Focus: OCAN Assessment
 Worker: Christian Gosselin

Canadian Mental Health Association
 Windsor-Essex County
 Mental health for all

Progress Note

Client: Alex Kauffman Client Number: 04055415-01
 Staff Name: Christian Gosselin Program: Case Management

Date: Apr 21, 2016 Start Time: [dropdown] Duration: [dropdown]
 Contact Type: [dropdown]
 Additional Individuals Present: [text area]

Individual's Condition

Appearance: [dropdown]
 Affect: [dropdown]
 Mood: [dropdown]
 Behaviour: [dropdown]

Showing 1 Items ▶

Figure 133 - Filling Out a New Form

- Fill out the form as necessary and once satisfied click on the **Save** button as shown in Figure 134.

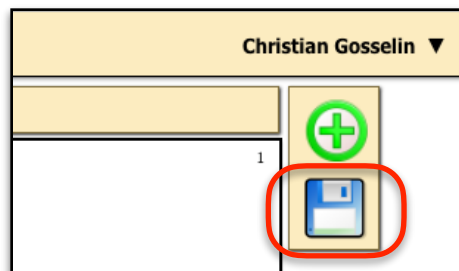


Figure 134 - Saving Form

- Alternatively, users can click on the **File** menu and select **Save Form**.

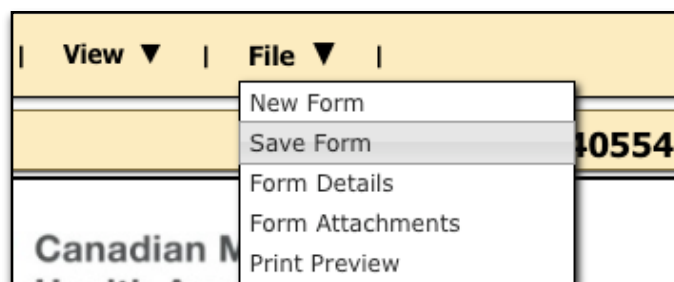


Figure 135 - Saving Form

8. A message will appear confirming the form has successfully been saved.



Figure 136 - Successfully Saved Form

9. Once the form has been saved, the Forms History will automatically refresh and the new form will be available on the left hand side of the Forms module.

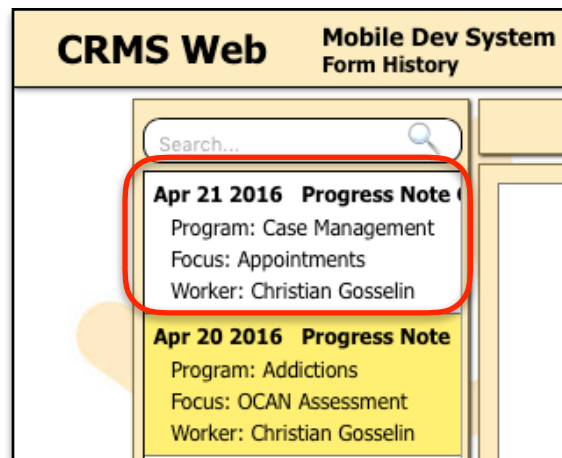


Figure 137 - Reviewing Saved Form

Marking a Note/Form as Mistake

1. In order to mark a note/form as a mistake, first locate the desired note/form using the Forms History as described on page 70.
2. Click to select the note.
3. Click on the **Magnifying Glass** as shown in Figure 138.



Figure 138 - Marking a Note/Form as a Mistake

- Alternatively, users can also click on the **File** menu and select **Form Details** as illustrated below in Figure 139.

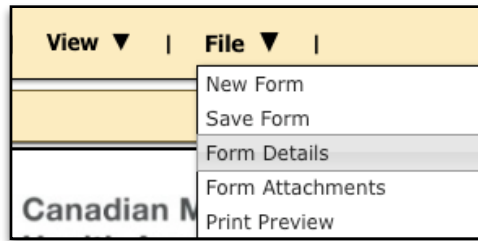


Figure 139 - Marking a Note/Form as a Mistake

- The **Forms Details** dialog will then be loaded on screen.
- Click on **Mistake** as shown in Figure 140.

A screenshot of a 'Form Details' dialog box. It contains several fields: 'Program' (Case Management), 'Incident Date' (Apr 21, 2016), 'Created' (Apr 21, 2016), 'Focus' (Appointments), and 'Worker' (Christian Gosselin). Below these are checkboxes for 'Critical', 'Private', and 'Mistake'. The 'Mistake' checkbox is checked and circled in red. At the bottom, there is a 'Comments' text area and 'Save' and 'Cancel' buttons.

Figure 140 - Marking a Note/Form as a Mistake

- The note will then highlighted in grey as shown in Figure 141.

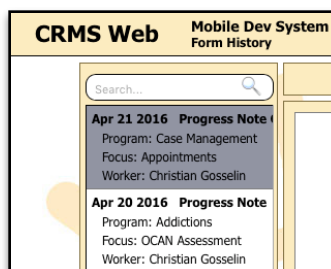


Figure 141 - Note/Form Flagged as Mistake

Marking a Note/Form as Critical

1. In order to mark a note/form as critical, first locate the desired note/form using the Forms History as described on page 70.
2. Click to select the note. Click on the **Magnifying Glass** as shown in Figure 142.



Figure 142 - Marking a Note/Form as a Mistake

3. Alternatively, users can also click on the **File** menu and select **Form Details** as illustrated below in Figure 143.

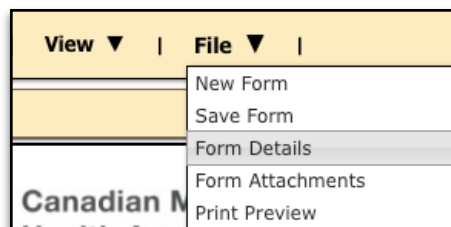


Figure 143 - Marking Note/Form as a Mistake

4. Check off the **Critical** checkmark in the Form Details dialog.



Figure 144 - Marking Note/Form as Critical

5. The note/form will then be flagged in red.

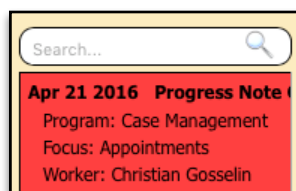


Figure 145 - Note/Form Marked as Critical

Marking a Note/Form as Private

1. In order to mark a note/form as private, first locate the desired note/form using the Forms History as described on page 70.
2. Click to select the note. Click on the **Magnifying Glass** as shown in Figure 146.



Figure 146 - Marking a Note/Form as a Mistake

3. Alternatively, users can also click on the **File** menu and select **Form Details** as illustrated below in Figure 147.

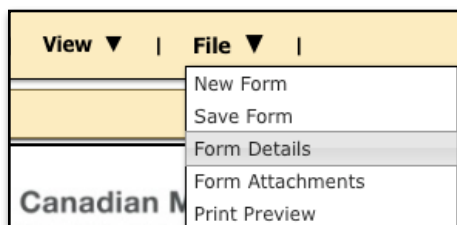


Figure 147 - Marking Note/Form as a Mistake

4. Check off the **Private** checkmark in the Form Details dialog.

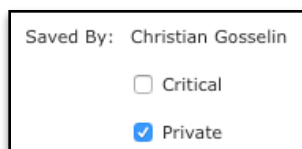


Figure 148 - Marking Note/Form as Private

5. The note/form will then be flagged in yellow.

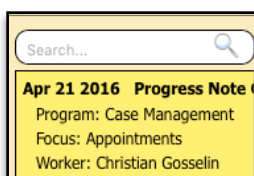


Figure 149- Note/Form Marked as Private



****TIPS AND TRICKS* - Marking a note/form as private prevents other staff members from reviewing the contents (unless the necessary permission has been granted).***

Adding an Attachment

1. In order to add an attachment to a note/form, first locate the desired note/form using the Forms History as described on page 70.
2. Click to select the note. Click on the **Paperclip** as shown in Figure 150.



Figure 150 - Adding an Attachment

3. The Attachment Dialog will then be displayed on screen as demonstrated in Figure 151.

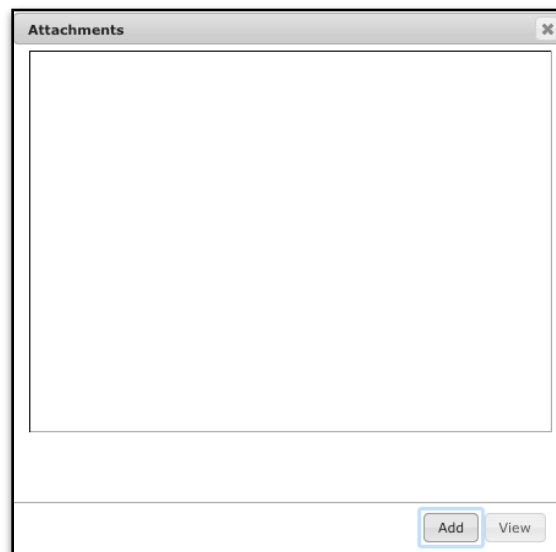


Figure 151 - Attachments Dialog

- Click **Add** to select your desired attachment. The file selector will then appear allowing the user to select their attachment.

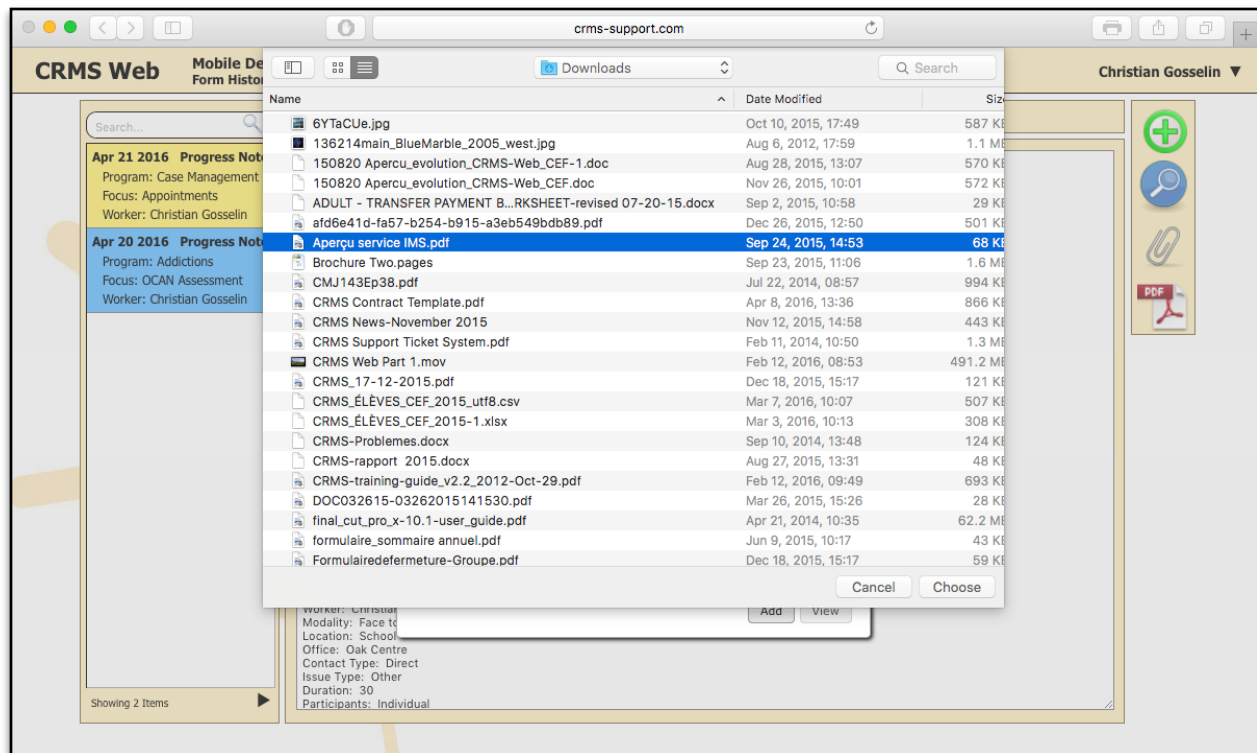


Figure 152 - Selecting Desired Attachment

- Upon selecting the desired file, click **Choose** to finalize the process.
- A message will appear confirming the process was successful.

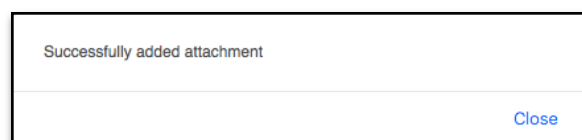


Figure 153 - Successfully Added Attachment

- The Attachments dialog will then close and the Forms History will automatically refresh.
- The newly added attachment can be identified by the paperclip icon next to the note.

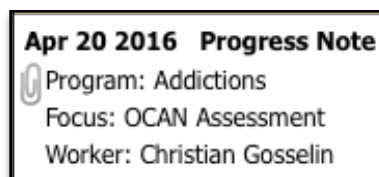


Figure 154 - Identifying Notes/Forms With Attachments

Reviewing an Attachment

1. In order to review an attachment, first locate the desired note/form using the Forms History as described on page 70.
2. Click to select the note. Click on the **Paperclip** as shown in Figure 155.



Figure 155 - Reviewing an Attachment

3. The Attachments Dialog will then appear on screen as demonstrated in Figure 156.

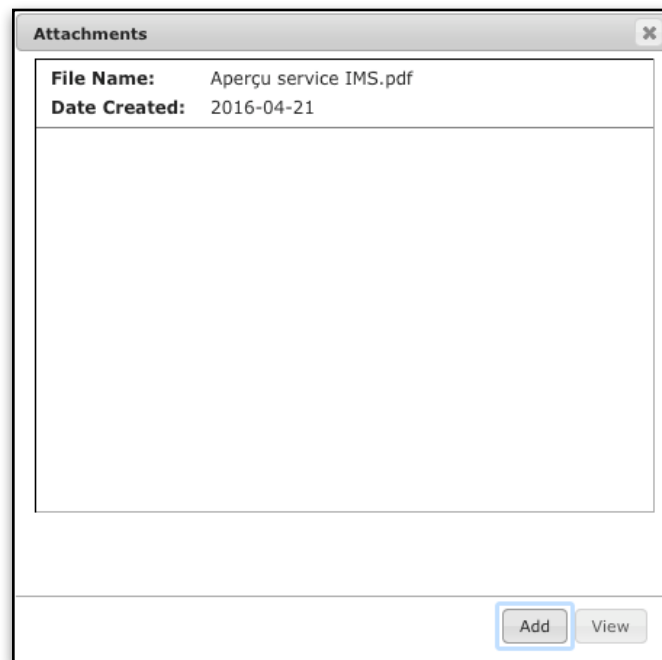


Figure 156 - Reviewing an Attachment

4. Select the desired file from the list. Click **View** after selecting the desired attachment. The attachment will either be downloaded or displayed on screen.

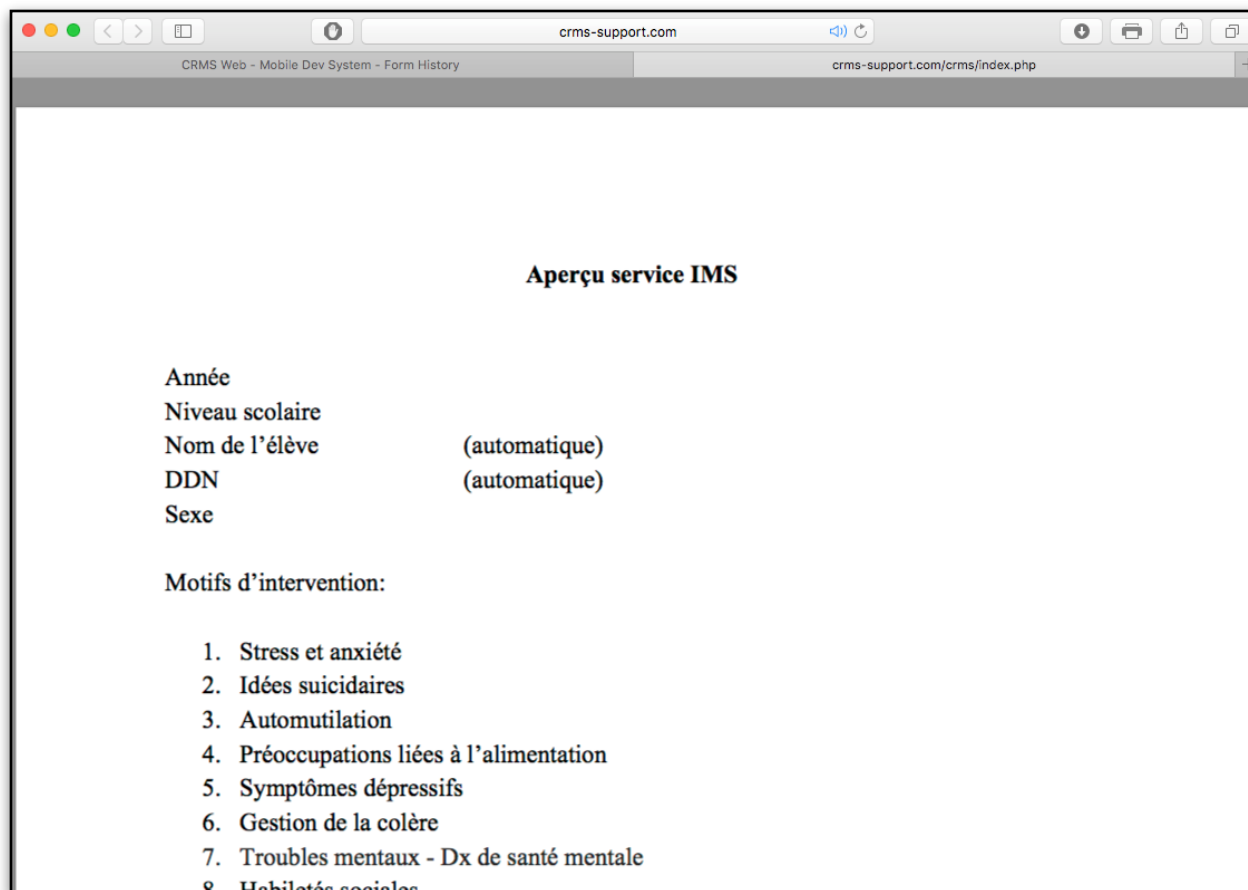


Figure 157 - Reviewing Attachment

Service Summary

The Service Summary module allows users to quickly review program data, most recent contact and if any consents have been created for the client in one quick convenient method.

1. In order to access the **Service Summary** first locate the desired client using the “CRMS Search Engine” as described on page 17.
2. Alternatively, if the client file is already open, click on the Client Shortcut in order to access the Entity Actions menu as demonstrated in Figure 158.

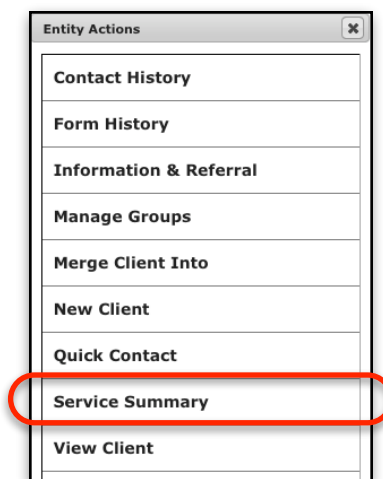


Figure 158 - Accessing Service Summary

3. The Service Summary module will then appear on screen as illustrated below in Figure 159.

A screenshot of the 'Service Summary - Kauffman, Alex (4055415)' window. It contains a table with columns: Program, Worker, Pending Assessment, Intake Assessment, Un-Pending, Entry, and Exit. The table has two rows of data. Below the table, it says 'NO CURRENT RELEASES' and 'Last Contact: 2016-04-21 - Addictions - Christian Gosselin'.

Program	Worker	Pending Assessment	Intake Assessment	Un-Pending	Entry	Exit
Addictions	Christian Gosselin	2016-04-19				
Case Management	Christian Gosselin	2016-04-19	2016-04-19		2016-04-19	

NO CURRENT RELEASES
Last Contact: 2016-04-21 - Addictions - Christian Gosselin

Figure 159 - Service Summary Module

Managing Clients' Groups



TIPS AND TRICKS - Managing groups is also covered on page 84 in the “Groups” section.

1. In order to manage a clients' groups, first locate the desired client using the “CRMS Search Engine” as described on page 17.
2. Alternatively, if the client file is already open, click on the Client Shortcut in order to access the Entity Actions menu as demonstrated in Figure 160.

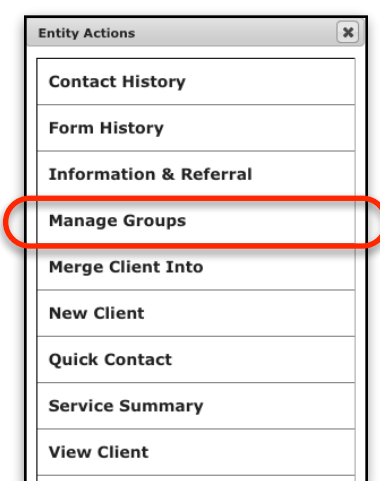


Figure 160 - Managing Groups

3. The Client Groups Dialog will then be displayed on screen.

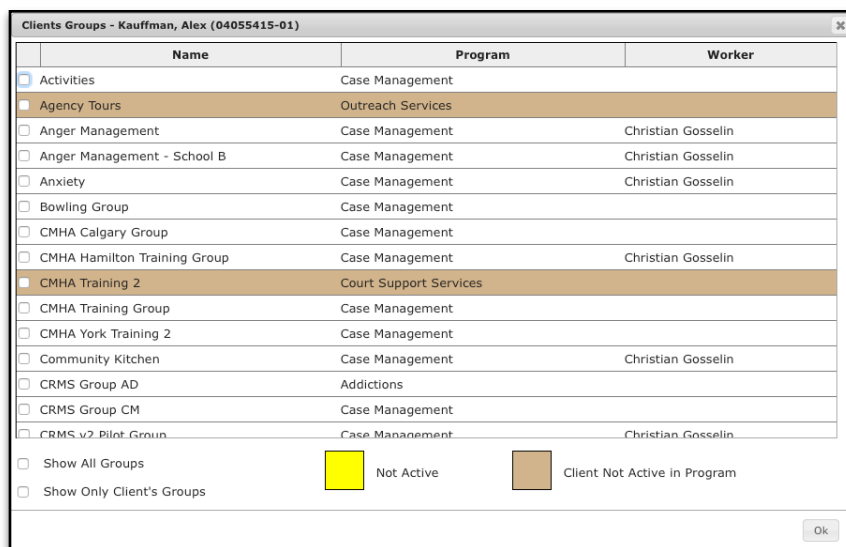


Figure 161 - Client Groups Dialog

- As demonstrated in Figure 162 below, the user has added the client to three groups : “Anger Management”, “Bowling Group”, “Community Kitchen”.

Clients Groups - Kauffman, Alex (04055415-01)

	Name	Program	Worker
☐	Activities	Case Management	
☐	Agency Tours	Outreach Services	
☒	Anger Management	Case Management	Christian Gosselin
☐	Anger Management - School B	Case Management	Christian Gosselin
☐	Anxiety	Case Management	Christian Gosselin
☒	Bowling Group	Case Management	
☐	CMHA Calgary Group	Case Management	
☐	CMHA Hamilton Training Group	Case Management	Christian Gosselin
☐	CMHA Training 2	Court Support Services	
☐	CMHA Training Group	Case Management	
☐	CMHA York Training 2	Case Management	
☒	Community Kitchen	Case Management	Christian Gosselin
☐	CRMS Group AD	Addictions	
☐	CRMS Group CM	Case Management	
☐	CRMS v2 Pilot Group	Case Management	Christian Gosselin

☐ Show All Groups Not Active Client Not Active in Program

☐ Show Only Client's Groups

Ok

Figure 162 - Modifying Client Groups



TIPS AND TRICKS - Note that certain rows are highlighted in brown. This indicates the client is currently not receiving services in that program.

- When satisfied with the changes, click **Ok** to finalize the process.

Managing Groups

In the previous section “Manage Clients’ Groups”, the user was managing an individual clients’ group memberships. In the following section of the manual, a user will accomplish the same task, however from the “Group” point of view, versus the “Client” point of view. On certain occasions, it might be easier to modify the entire “client group” versus going client file by client file individually.

1. In order to manage client groups, first access the CRMS Search Engine as described on page 16.
2. Modify the **Search Type** to **Client Groups** as demonstrated in Figure 163.

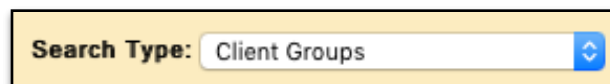
A yellow rectangular box containing the text "Search Type:" followed by a white input field with the text "Client Groups" and a blue dropdown arrow icon on the right.

Figure 163 - Searching for a Client Group

3. Enter the search criteria as necessary to locate the desired group. In Figure 164, a user is searching for a group named ‘anger management’.
4. Click **Search** when satisfied with the search criteria.

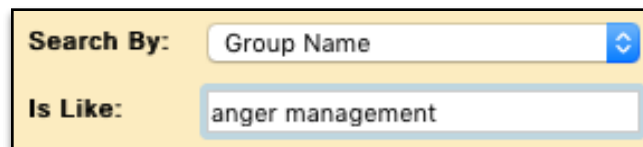
A yellow rectangular box containing two search fields. The first field is labeled "Search By:" and has a dropdown menu set to "Group Name". The second field is labeled "Is Like:" and contains the text "anger management".

Figure 164 - Searching for a Group Named ‘Anger Management’

5. **Click** on the desired group to bring the “Entity Actions” menu option as demonstrated in Figure 165 below.
6. Click on **Manage Clients in Group**.

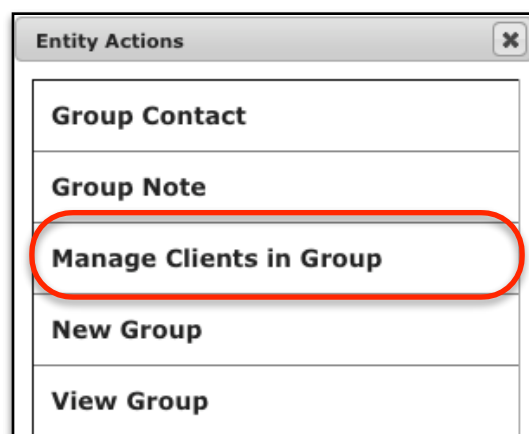
A window titled "Entity Actions" with a close button (X) in the top right corner. Inside the window is a list of five options: "Group Contact", "Group Note", "Manage Clients in Group", "New Group", and "View Group". The "Manage Clients in Group" option is highlighted with a red rounded rectangle.

Figure 166 - Managing Client in a Group

7. The **Manage Clients** Dialog will then appear on screen as illustrated in Figure 167.

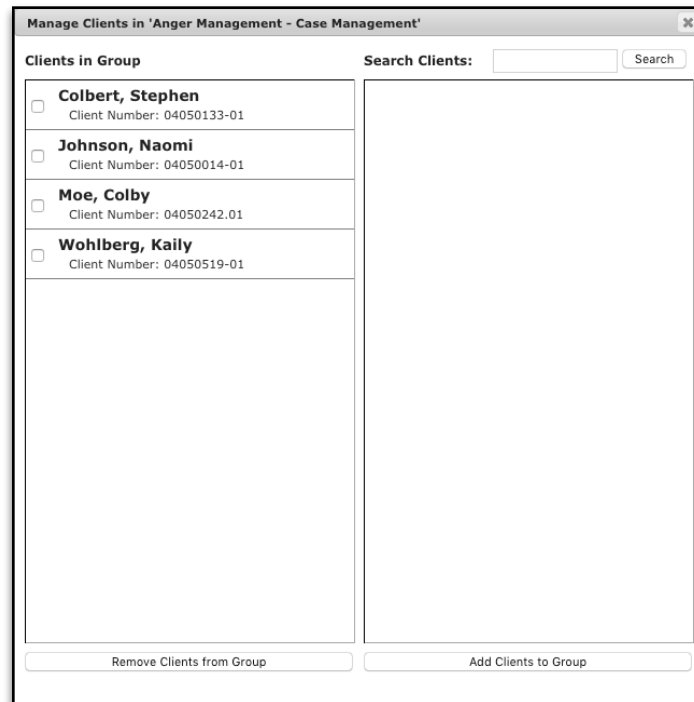


Figure 167 - Manage Client Dialog

Adding Clients to a Group

1. In order to add a client (or clients) to a group, refer to page 84 for how to access the “Client Groups” Search Type.
2. Open the **Manage Clients** dialog as seen in Figure 167 above.
3. In the Search Box, enter the desired search criteria. When satisfied, click **Search**.
4. In Figure 168 below, a user is searching for a client named ‘kauff’.

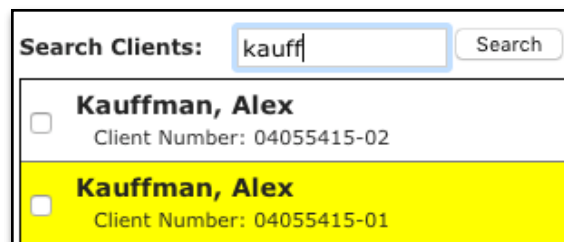


Figure 168 - Searching for a Client to Add to a Group

5. Upon locating the desired client (or clients), click to select their name.



Figure 169 - Selecting Client to Add to a Group

6. After checking off the desired client, click **Add to Group** as shown in Figure 170.



Figure 170 - Adding a Client to a Group

7. The client will then be added to the group.

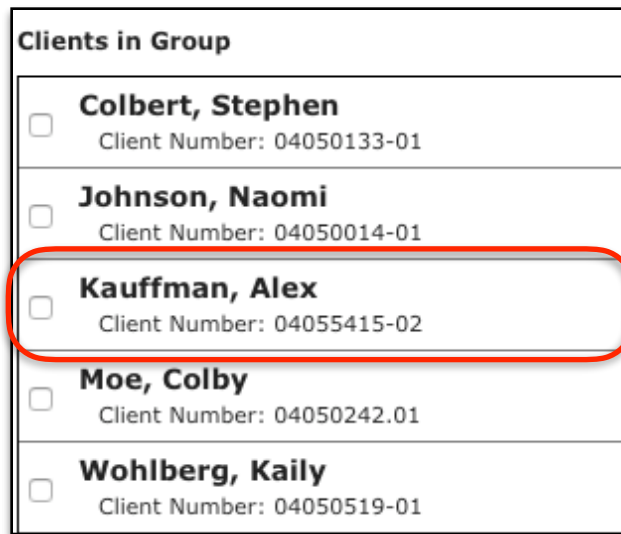


Figure 171 - Successfully Added Client to Group

8. Repeat for any additional clients as necessary.



****TIPS AND TRICKS* - Remember that these steps can also be accomplished from the “clients” POV, versus the “group” POV.***

Removing Clients from a Group

1. In order to remove a client (or clients) from a group, refer to page 84 for how to access the “Client Groups” Search Type.
2. Open the **Manage Clients** dialog as described on page 84.
3. Locate the client whom is to be removed from the group.
4. Click to check off their name(s) as shown in Figure 172 (see following page).

5. As seen in Figure 172, the user is selecting client “Moe, Colby” to be removed from the group.



Manage Clients in 'Anger Management - Case Mar	
Clients in Group	
☐	Colbert, Stephen Client Number: 04050133-01
☐	Johnson, Naomi Client Number: 04050014-01
☐	Kauffman, Alex Client Number: 04055415-02
☒	Moe, Colby Client Number: 04050242.01

Figure 172 - Removing a Client from a Group

6. Check off any additional clients which no longer need to be associated with this group.
7. Once satisfied, click **Remove Clients from Group** as shown in Figure 173 below.



Remove Clients from Group

Figure 173 - Removing Client(s) from a Group

8. The client will then be removed from the group and the client list will automatically refresh.



Clients in Group	
☐	Colbert, Stephen Client Number: 04050133-01
☐	Johnson, Naomi Client Number: 04050014-01
☐	Kauffman, Alex Client Number: 04055415-02
☐	Wohlberg, Kaily Client Number: 04050519-01

Figure 174 - Successfully Removed Client from Group

9. Repeat for any additional clients or groups as necessary.

Creating a New Group

1. There are instances where a new group will need to be created, rather than simply modifying an existing group.

2. In order to add a client (or clients) to a group, refer to page 84 for how to access the “Client Groups” Search Type.
3. **Click** anywhere to bring up the “Entity Actions” menu as shown in Figure 175.



Figure 175 - Creating a New Group

4. Click **New Group** as demonstrated in Figure 175 above.
5. The **New Group** dialog window will then appear on screen.
6. Enter the desired group name, group type (if applicable) and select the program associated to the group.
7. In Figure 176 below, a user is creating a new group titled “Pottery Class” for the program Case Management.

A screenshot of a "New Client Group" dialog box. It has a title bar with the text "New Client Group" and a close button (X). The dialog contains the following fields: "Group Name:" with the text "Pottery Class" entered; "Group Type:" with an empty text field; "Program:" with a dropdown menu showing "Case Management"; and a checkbox labeled "Active" which is checked. At the bottom right, there are "Ok" and "Cancel" buttons.

Figure 176 - Creating a New Group

8. When satisfied with the group details, click **Ok** to finalize the process.
9. A message box will appear confirming the group was successfully created.



Figure 177 - Successfully Created New Group

10. Refer to page 84 above for how to manage the newly created group.

Creating a Group Note

1. Once a group has successfully been created, **AND** clients have been added to the group, the user can now create a group note.
2. Refer to page 84 for how to change the CRMS Search Engine “Search Type” to “**Client Groups**”.
3. Execute a search to locate the desired group.
4. Click on the group in order to bring up the “Entity Actions” menu.
5. Click **Group Note** as seen above in Figure 178.

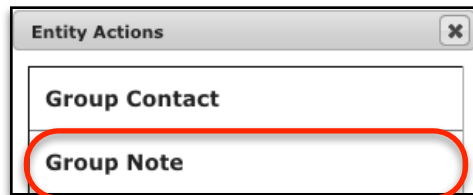


Figure 178 - Creating a Group Note

6. The **Group Note** module will then appear on screen as illustrated in Figure 179.

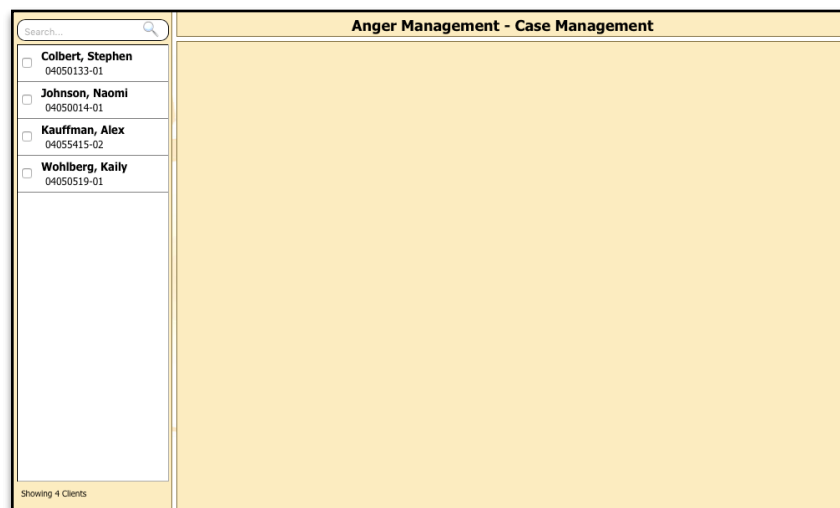


Figure 179 - Group Note Module

7. Click on the **File** menu as shown in Figure 180. Click on **New Form**.

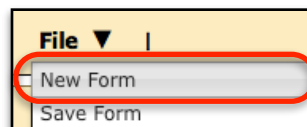
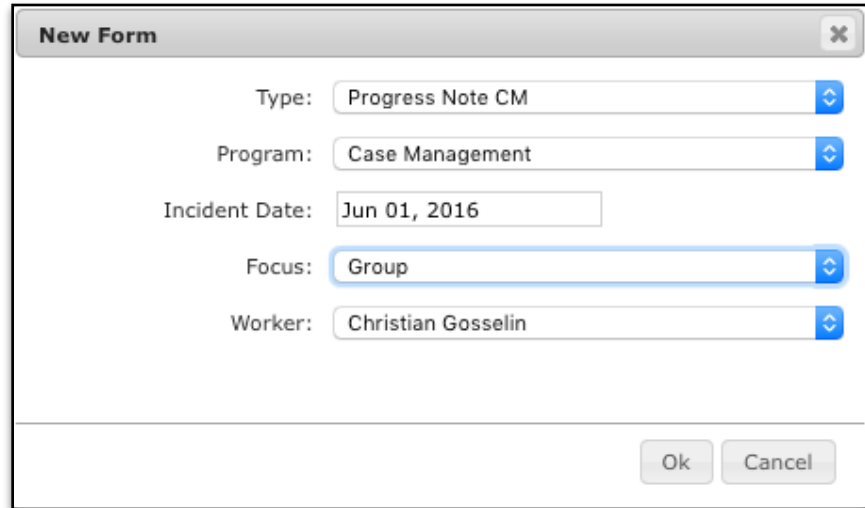


Figure 180 - Creating a New Group Note/Form

8. The **New Form** dialog (see following page) will then appear on screen.



New Form

Type: Progress Note CM

Program: Case Management

Incident Date: Jun 01, 2016

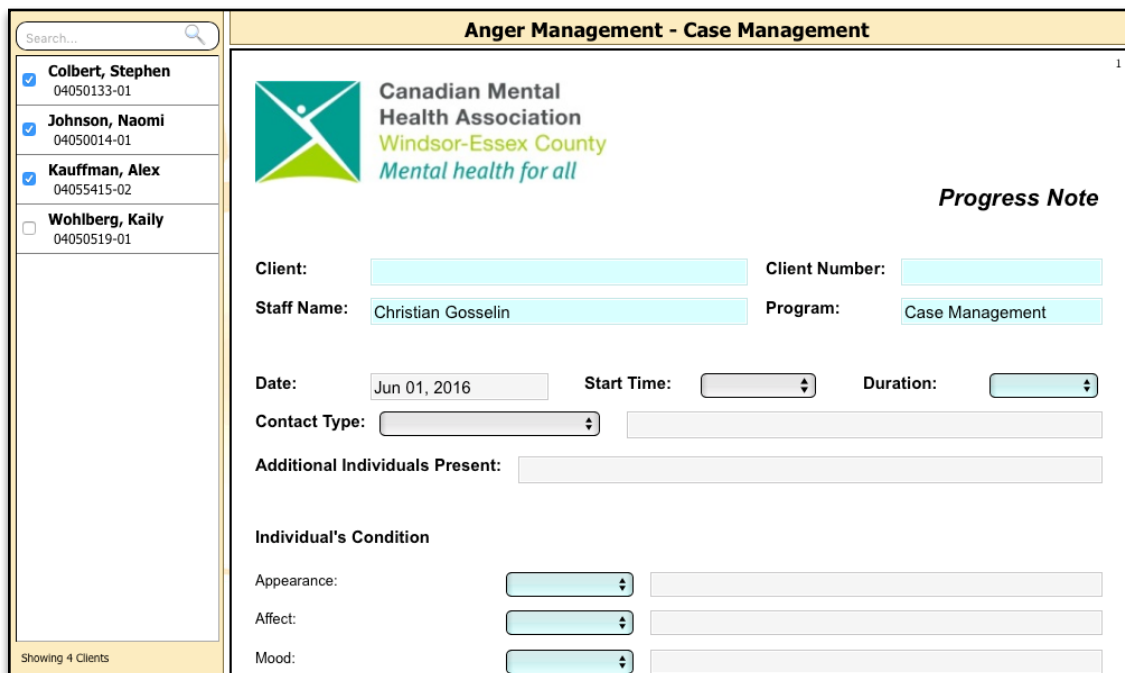
Focus: Group

Worker: Christian Gosselin

Ok Cancel

Figure 181 - New Form Dialog

9. As can be seen in Figure 181, a user is creating a new “Progress Note CM” for the program “Case Management” with an incident date of June 1, 2016 and a focus of “Group”.
10. Click **Ok** to bring up the group note/form.
11. The note/form will then appear on screen.



Anger Management - Case Management

Search...

☒ **Colbert, Stephen**
04050133-01

☒ **Johnson, Naomi**
04050014-01

☒ **Kauffman, Alex**
04055415-02

☐ **Wohlberg, Kaily**
04050519-01

Showing 4 Clients

Canadian Mental Health Association
Windsor-Essex County
Mental health for all

Progress Note

Client: Client Number:

Staff Name: Christian Gosselin Program: Case Management

Date: Jun 01, 2016 Start Time: Duration:

Contact Type:

Additional Individuals Present:

Individual's Condition

Appearance: Affect: Mood:

Figure 182 - Creating a New Group Progress Note

12. Check off the clients who attended the group session. In Figure 182, all but one client attended.

13. When satisfied with the form/note, click **File** and **Save Form** as seen below in Figure 183.

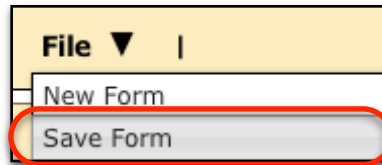


Figure 183 - Saving Group Note/Form

14. A message box will appear confirming the process was indeed successful.



Figure 184 - Successfully Saved Group Note/Form

15. The group note/form was then saved into each of the checked off clients.

16. Users can now modify each case note individually should more details need to be added for a particular individual.

Creating a Group Contact

1. Users can also utilize the **Client Groups** module to create a group contact as well.
2. Refer to page 84 for how to modify the CRMS Search Engine **Search Type** to **Client Groups**.
3. Execute a search to locate the desired group.
4. Click on the group in order to bring up the "Entity Actions" menu (see following page).

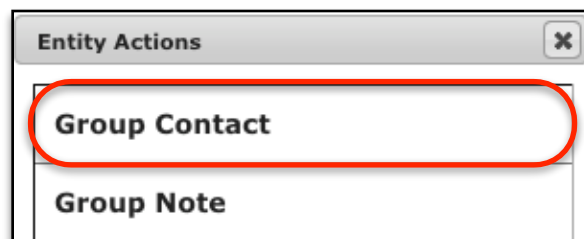


Figure 185 - Creating a Group Contact

5. Click **Group Contact** as seen above in Figure 185.
6. The **Group Contact** dialog will then appear on screen (see following page).

Group Contact

☒ Colbert, Stephen (0405013) Contact Date: Jun 01, 2016 Time: 11:00
☒ Johnson, Naomi (0405001) Program: Case Management Worker: Christian Gosselin
☒ Kauffman, Alex (04055415) Modality: Contact Location: School
☒ Wohlberg, Kaily (04050515) Issue Type: Office Location: Oak Centre

☐ Indirect ☐ Secondary Worker

Participants:

- ☐ Individual
- ☒ Group
- ☐ Police
- ☐ Doctor
- ☐ Lawyer
- ☐ Non Registered

Non Reg.: 0 0.00 hours

Focus: Appointments

Note:

☒ Active Only

Save Cancel

Figure 186 - Creating a Group Contact

7. Fill out the necessary fields, and ensure to un-select any clients whom have not attended the group session.
8. Figure 187 below illustrates the Group Contact module prior to saving.

Group Contact

☒ Colbert, Stephen (0405013) Contact Date: Jun 01, 2016 Time: 11:00
☒ Johnson, Naomi (0405001) Program: Case Management Worker: Christian Gosselin
☒ Kauffman, Alex (04055415) Modality: Face to Face Contact Location: Office
☐ Wohlberg, Kaily (04050515) Issue Type: Other Office Location: Oak Centre

☐ Indirect ☐ Secondary Worker

Participants:

- ☐ Individual
- ☒ Group
- ☐ Police
- ☐ Doctor
- ☐ Lawyer
- ☐ Non Registered

Non Reg.: 0 0.50 hours

Focus: Group

Note: Had a great pottery session with the group. Everyone made a lovely bowl and had a positive experience.

☒ Active Only

Save Cancel

Figure 187 - In Process of Creating Group Contact

9. When satisfied with the inputted data, click **Save** to finalize the process.



Figure 188 - Saving Group Contact

10. A message box will appear confirming the process was indeed successful.

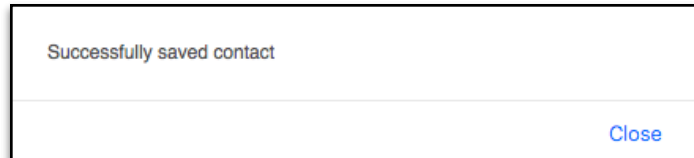


Figure 189 - Successfully Saved Group Contact

11. A user can then quickly review the “Worker Summary Task Pane” to ensure the contact was properly inputted. Refer to page 111 for how to access the “Task Pane”.

Worker Summary	
From:	Jun 01, 2016
To:	Jun 01, 2016
Compensation	
Total Time (min):	0
Count:	0
Direct Face to Face	
Total Time (min):	30
Count:	1
Direct Other	
Total Time (min):	0
Count:	0
Direct Telephone	
Total Time (min):	0
Count:	0
Indirect	
Total Time (min):	0
Count:	0
Information & Referral	
Total Time (min):	0
Count:	0
Staff Time	
Total Time (min):	0
Count:	0
Summary	
Total Time (min):	30
Total Time (hrs):	0.50
Count:	1

Figure 190 - Reviewing Newly Inputted Group Contact

Merging Clients

Should duplicate files arise, CRMS Administrator can merge two client files together and combine their contents in order to resolve these issues.

Following the example below in Figure 191, a CRMS Administrator can take the file marked 'A' and transfer it into file marked 'B'.

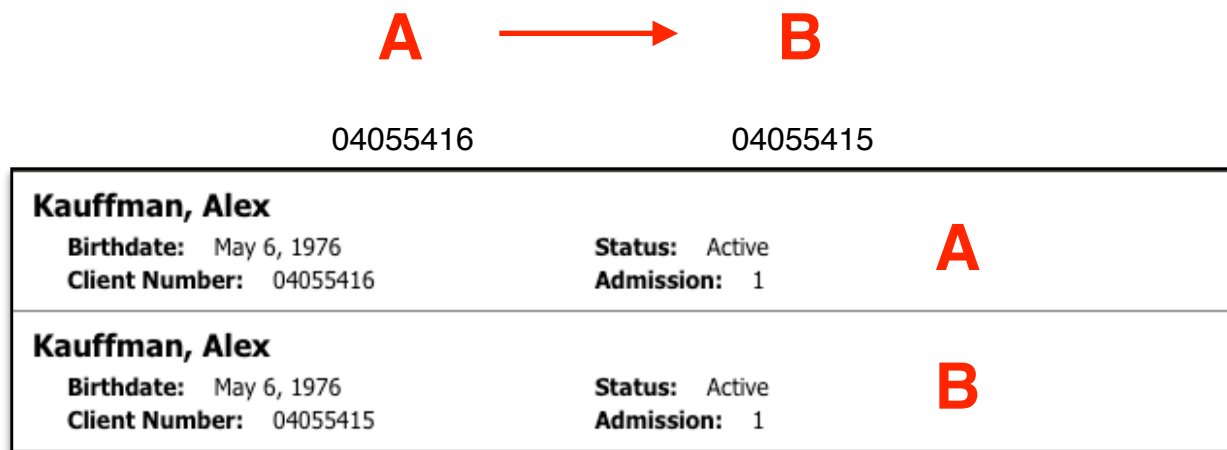


Figure 191 - Preparing to Merge Client Files

Once the software has execute the merge, it will automatically delete file marked 'A', transferring the contents into file marked 'B'.

1. Access the CRMS Search Engine as described on page 17 in order to locate the file marked 'A'. This file will be **transferred into** the file you select in the next steps.
2. Click on the desired client and select **Merge Client Info** as shown in Figure 192.



Figure 192 - Merging Client Info

3. The **Merge Client Dialog** will then appear on screen as illustrated below.

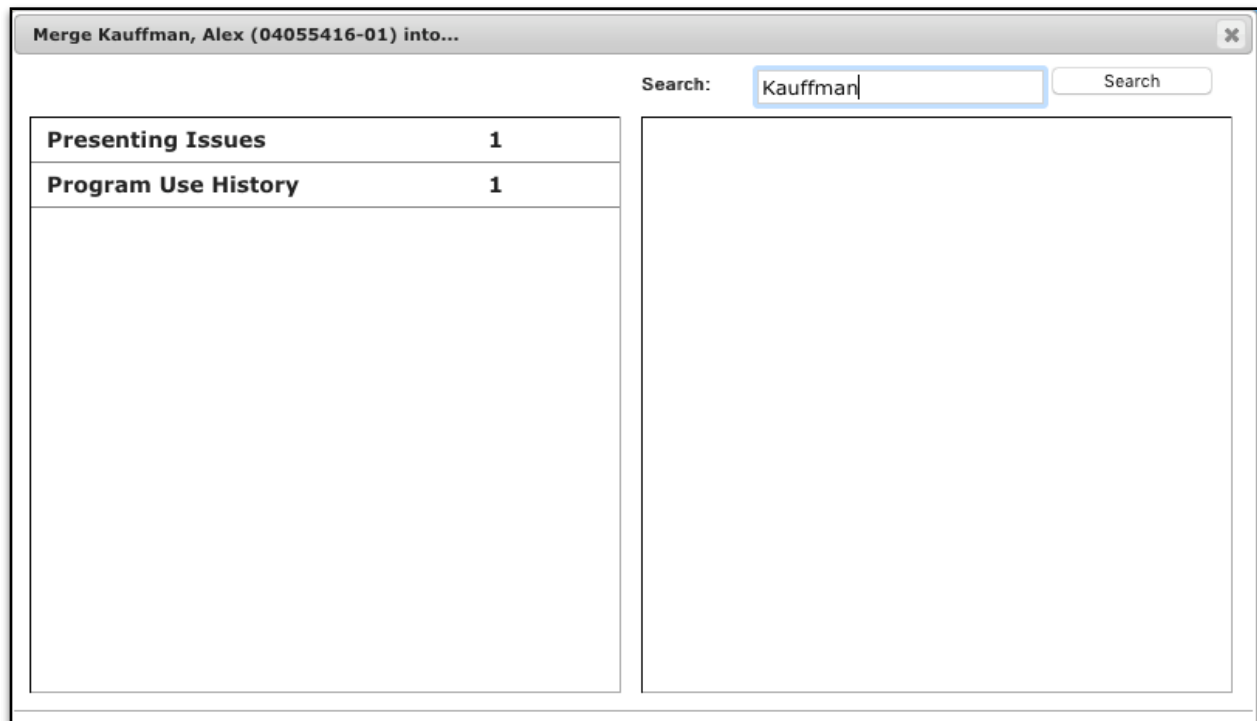


Figure 193 - Merge Client Dialog

4. Note the title bar on the Merge Client Dialog. The software has given the user an indication of how the merge will be executed.



Figure 194 - Reviewing Merge Client Dialog

5. Also note that the software has also pre-populated the search criteria for the user.

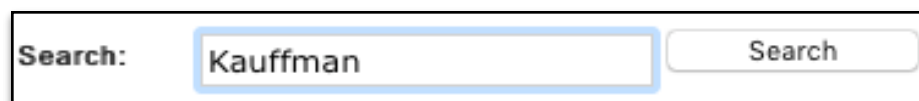


Figure 195 - Performing Search for File 'B' (which will receive the contents of File 'A')

6. Modify the search criteria if necessary and click on **Search** when satisfied.
7. Figure 196 (see following page) illustrates the Merge Client Dialog after performing the search.

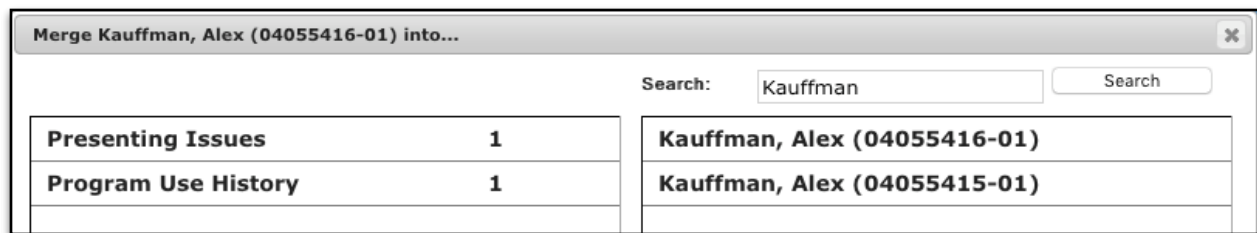


Figure 196 - Performing Search for File 'B'

8. From the list of returned search results, click on the desired file. The selected file is indicated by the blue highlight.

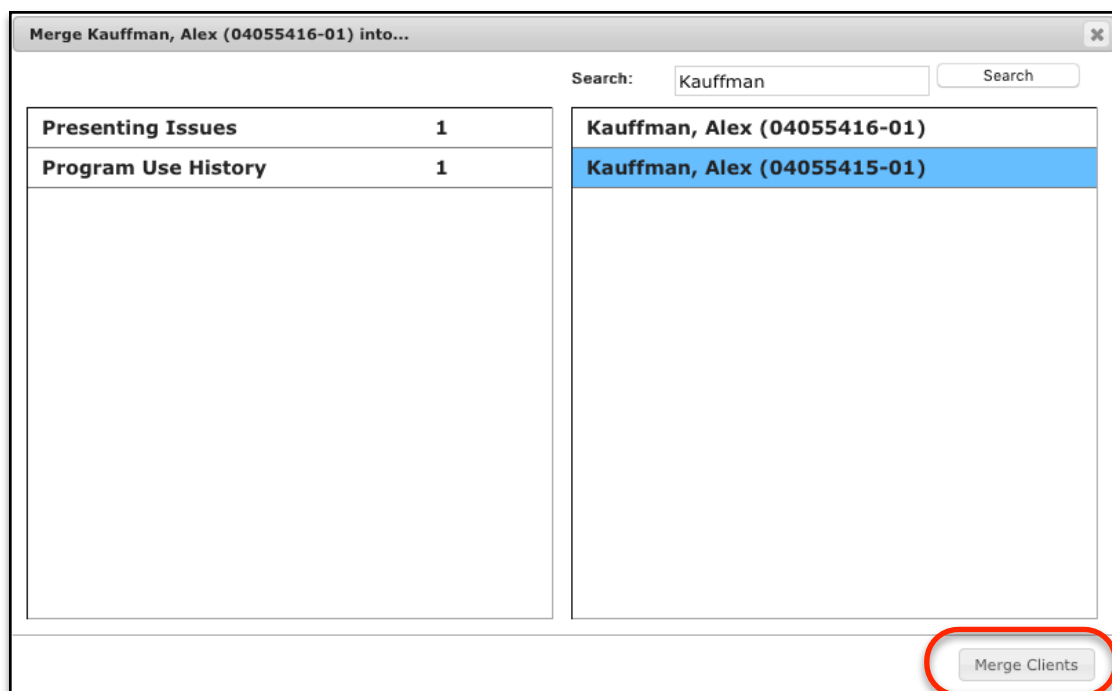


Figure 197 - Selecting File 'B'

9. This file will receive the contents of the file selected in the previous steps.
10. Once satisfied with the parameters, click on **Merge Clients** as shown in Figure 197.
11. A confirmation message will appear once the merge has been performed.

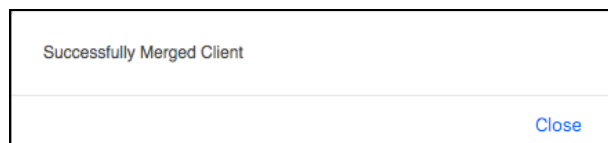


Figure 198 - Successfully Merged Client File



****TIPS AND TRICKS* - CRMS Administrators can also merge a client INTO the same client file - this will cause CRMS Web to DELETE the file.***

Deleting a Client File

In an instance where the client file has no suitable target, ie., a user has created a fictitious client “Donald, Duck” on the ‘Production’ system. This file will not have a desired target, and likely needs to be deleted altogether.

1. Repeat the steps listed above on page 94 “**Merging Clients**” on how to locate the desired client.
2. Click **Merge Client Info** as demonstrated below.

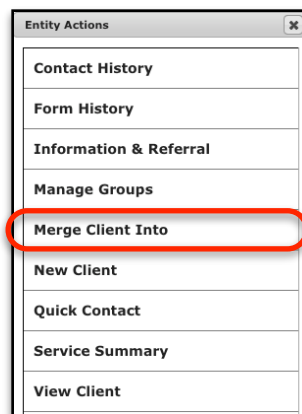


Figure 199 - Merging Client Info

3. As seen in Figure 200, when selecting the same client file, the button's caption changes to “Delete Client”.

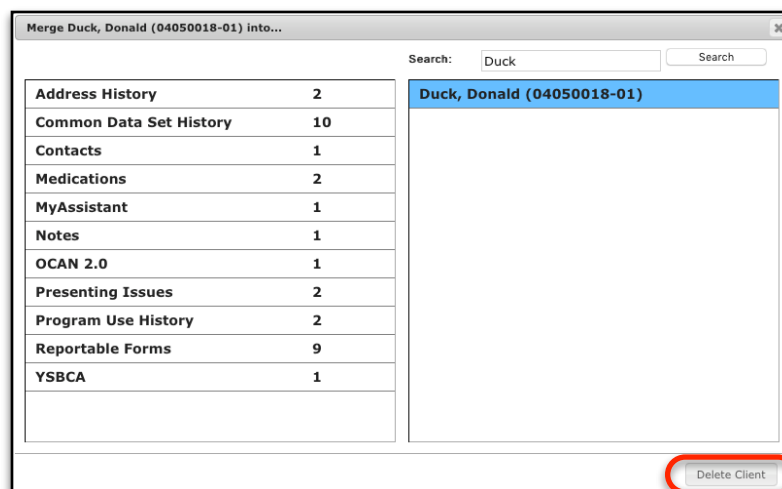


Figure 200 - Deleting Client

4. When merging or deleting a client file, pay close attention to the left hand side of the Merge Client Dialog.
5. It provides the user with a summary of the contents of the client file to be merged.
6. This is further demonstrated in Figure 201.

Merge Duck, Donald (04050018-01) into...	
Address History	2
Common Data Set History	10
Contacts	1
Medications	2
MyAssistant	1
Notes	1
OCAN 2.0	1
Presenting Issues	2
Program Use History	2
Reportable Forms	9
YSBCA	1

Figure 201 - Reviewing Merge Client Info

7. Merges should only be performed by a CRMS Administrator or a user which has been given proper training on the procedure.



Contact CRMS Support should you make a mistake when performing a merge.

De-Activating a Client

Once a client has terminated their services within the agency, they can be **de-activated** from the CRMS system. This will change their file from an 'Active' chart to a 'Not Active' chart.

1. Refer to page 14 for how to login to CRMS Web.
2. Refer to page 17 for how to locate the desired client using the CRMS Search Engine.
3. Navigate to the Agency History page as shown below in Figure 202.

The screenshot shows the CRMS Web interface for a client named Kauffman, Alex (04055415-01) - Active. The left sidebar contains a menu with 'Back', 'Agency History', 'Addictions', 'Case Management', and 'Supported Housing'. The 'Addictions' section is highlighted with a red circle. The main content area displays various fields for the client's information, including Referral Source, Address, Activation Date, Diagnostic Category, and Common Data Set Evaluation.

Field	Value
Referral Source	Family Physician
Referred By	
Address	
Phone	
Ext	
Email	
Activation Date	Apr 19, 2016
Reason for Initial Referral into agency	
Diagnostic Category	Schizophrenia and other Psychotic Dis
Age of onset for mental illness	NA
Age of first hospitalization	NA
Common Data Set Evaluation	
MIS Exit Status	
MIS Exit Date	
Client consents to receive the CARE TRANSITIONS MEASURE SURVEY	

Figure 202 - Discharging Program from Clients' File

4. Note in Figure 202 above, the client is still receiving services from three programs : Addictions, Case Management, and Supported Housing. These programs must be closed prior to being able to discharge the client file.

Discharging a Program

1. In order to be able to de-activate a client file, all active programs must be closed.
2. Repeat steps listed above in order to locate the desired client and navigate to the Agency History page. Click on the desired program which will be closed.
3. In this example, the worker is closing the "Case Management" program.



****TIPS AND TRICKS* - Prior to discharging the program, ensure that all CDS Baseline Data has been populated! As can be seen below in Figure 203 and Figure 204, several CDS elements have been missed.***

Referral Source:	
Reason:	
Diagnostic Category:	Schizophrenia and other Psychotic Disord
Presenting Issues:	☐ Threat to Others/Attempted Suicide ☐ Specific symptoms of serious mental illness ☐ Physical/Sexual Abuse ☐ Educational ☐ Occupational/Employment/Vocational
	CTO Court Orders
Preferred Language:	English
Highest Level of Education:	
Language Delivery:	

Figure 203 - Ensuring CDS Baselines are Captured (Pending Assessment)

Entry Date:	Apr 19, 2016	Reason:	
		Legal Status:	Awaiting fitness assessment
		Living Arrangements	
		Residence Type	
		Residence Status	
		Employment	
		Primary Income	
		Education Status	

Figure 204 - Ensuring CDS Baselines are Captured (Entry Date)

4. Ensure all mandatory information has been captured. Depending on the clients' flow through the program, the user might be un-pending the client, or performing an exit.
5. In this example, as the client has been admitted (entry transaction), therefore user will be performing an exit transaction next.
6. As can be seen in Figure 205 (see following page), the user is in the process of inputting the exit date.

Figure 205 - Inputting Exit Date to Discharge Program

7. Input all the mandatory fields located next to the Exit Date. This is demonstrated in Figure 206.

Figure 206 - Inputting Mandatory Exit Date Fields

8. Once satisfied with the changes, click the **Save** button as identified below.



Figure 207 - Saving Changes to Program

9. A message will appear confirming the process.



Figure 208 - Successfully Discharged Program

10. The Agency History module will automatically refresh. The program which was exited or un-pended will vanish out of the list as can be seen in Figure 209.

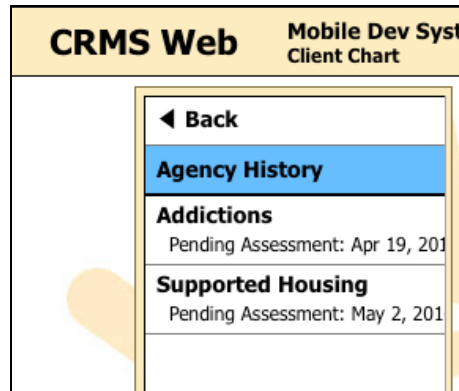


Figure 209 - Successfully Discharged Program

11. The discharged program can always be reviewed by clicking on **Show All** as demonstrated below.

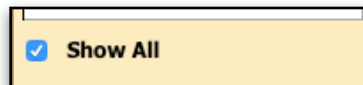


Figure 210- Showing Discharged Programs

12. The discharged program will then re-appear, highlighted in yellow to identify it is indeed **not active**.

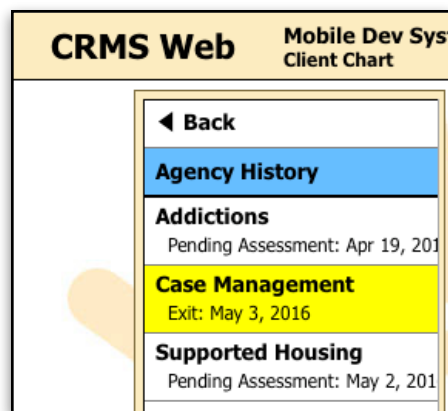


Figure 211 - Reviewing Discharged Programs

13. In order to deactivate the client file, ensure that all the remaining programs have also been un-pended or exited.
14. Repeat the steps listed above in order to de-activate the remaining programs.
15. Once all programs have been closed for the client file, the CRMS system will present a pop up to confirm the client is ready to be deactivated. This is illustrated in Figure 212.

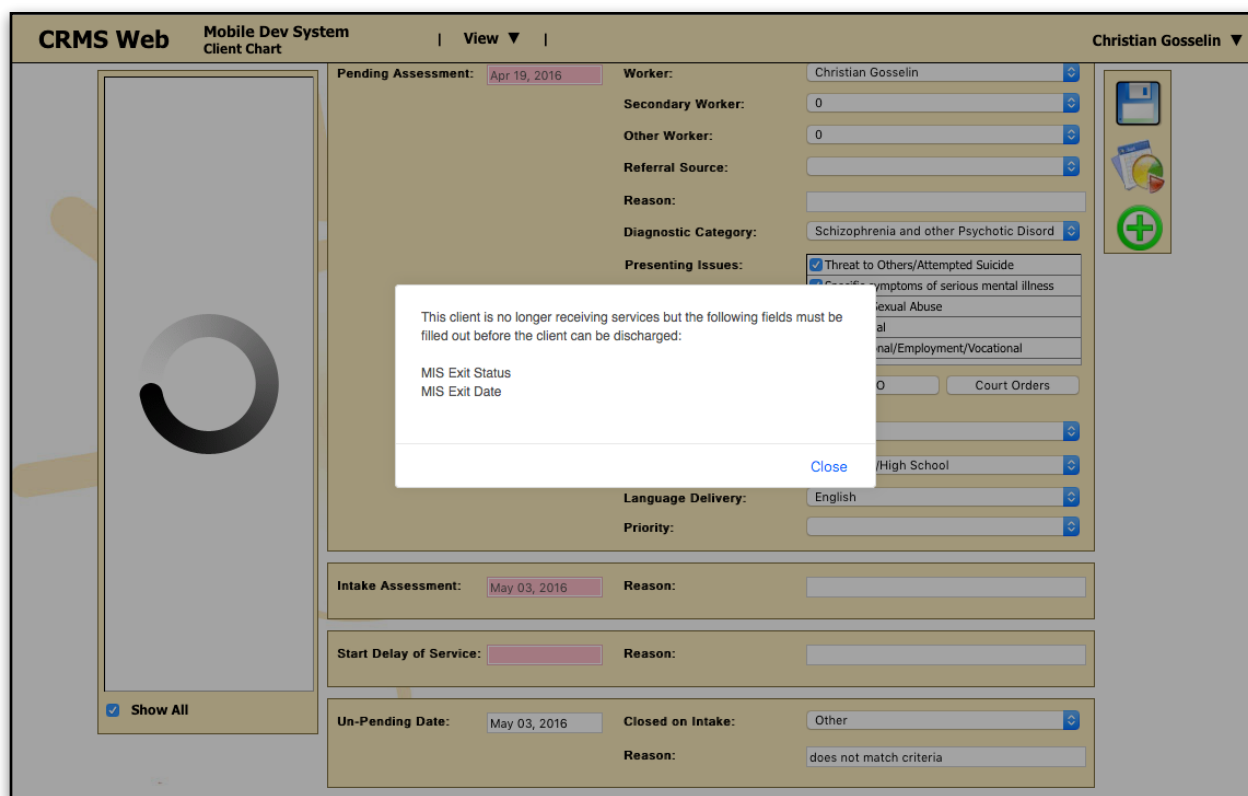


Figure 212 - Confirming Client No Longer Has Open Programs

16. Navigate to the main **Agency History** page as shown below in Figure 213.



Figure 213 - Navigating to Main Agency History Page

17. On the main Agency History page, locate the MIS Exit Status and MIS Exit Date. This is demonstrated on the following page in Figure 214.

Figure 214 - Locating MIS Exit Status and MIS Exit Date

18. Input the MIS Exit Status and MIS Exit Date as shown in Figure 215.

Figure 215- Inputting MIS Exit Status and MIS Exit Date

19. When satisfied with the changes, click **Save** to complete the process.



Figure 216 - Saving MIS Exit Status and MIS Exit Date

20. A message will appear confirming the save was successful.

Figure 217 - Successfully Saved MIS Exit Status and MIS Exit Date

21. Upon closing the confirmation message, a new pop up will appear on screen - the **Discharge Pop Up**. This is illustrated by Figure 218 below.

The screenshot shows the CRMS Web interface for a client named 'Kauffman, Alex (04055415-01) - Active'. The interface includes a left sidebar with navigation links: 'Back', 'Agency History', 'Additions' (Un-pending: May 3, 2016), 'Case Management' (Exit: May 3, 2016), and 'Supported Housing' (Un-pending: May 3, 2016). The main content area displays client information: 'Referral Source: Family Physician', 'Address' (empty), 'Activation Date: Apr 19, 2016', 'Diagnostic Category: Schizophrenia and other Psychotic Dis', 'Age of onset for mental illness: NA', 'Age of first' (NA), 'Referred By' (empty), 'Phone' (empty), 'Ext' (empty), 'Email' (empty), 'Reason for Initial Referral into agency' (empty), 'MIS Exit Status: Service Plan Complete', and 'MIS Exit Date: May 03, 2016'. A 'Discharge Client' pop-up dialog is centered on the screen, asking 'Discharge client?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted. The dialog also includes a 'Show All' checkbox at the bottom left.

Figure 218 - Discharge Client Pop Up



Discharging a client requires an access right. Should the user not see the Discharge Client Pop Up, they do not have the proper access right.

22. Click **Yes** to finalize discharging the client from the agency. This will change the clients' status from 'Active' to 'Not Active'. Notice the client title bar in Figure 219.

The screenshot shows the CRMS Web interface for the same client, 'Kauffman, Alex (04055415-01) - Not Active'. The client's status is now 'Not Active', which is highlighted by a red oval. The left sidebar shows navigation links: 'Search...', 'Demographics', 'Agency History', 'CDS History', and 'Changes'. The main content area displays client information: 'First Name: Alex', 'Middle Name' (empty), 'Alias' (empty), 'Last Name: Kauffman', 'Marital Status' (empty), 'Bilingual: Yes', 'Aboriginal Origin' (empty), and 'Health Card' (empty). The client title bar is highlighted by a red oval.

Figure 219 - Successfully Discharged Client

23. Should the user return to the CRMS Search Engine and perform a search for this client, they will show up highlighted in yellow (to indicate their status is 'Not Active').

CRMS Web		Mobile Dev System	CRMS Search Engine	View ▼	Christian Gosselin ▼
Search Type:	Demographics				
Search By:	Last Name				
Is Like:	kauff				
☐ Active Only					
		Kauffman, Alex Birthdate: May 6, 1976 Status: Not Active Client Number: 04055415 Admission: 1			

Figure 220 - Confirming Client Has Been Discharged from Agency



****TIPS AND TRICKS**** - *If a user cannot locate the newly discharged client file, have them verify the CRMS Search Engine Parameters. Perhaps 'Active Only' has been checked off.*

Toggling a Client

Upon discharging a client file from the agency, it becomes 'Not Active'. A 'Not Active' file will be marked as read-only (users cannot make further modifications). There are instances where a minor demographic update might need to be made to a read-only file. This can be accomplished by **'toggling'** the client.

1. Refer to page 14 for how to login to CRMS Web.
2. Refer to page 17 for how to access the CRMS Search Engine.
3. Execute a search to locate the desired client.
4. Click on the desired client to bring up the "Entity Actions" menu.
5. Click on **Toggle Client** as seen in Figure 221.



Figure 221 - Toggling a Client

6. The client file will then loaded as seen in Figure 222. Note in Figure 222, that while the client is "Not Active", the Save button has been available to the user as they have "toggled" the client.

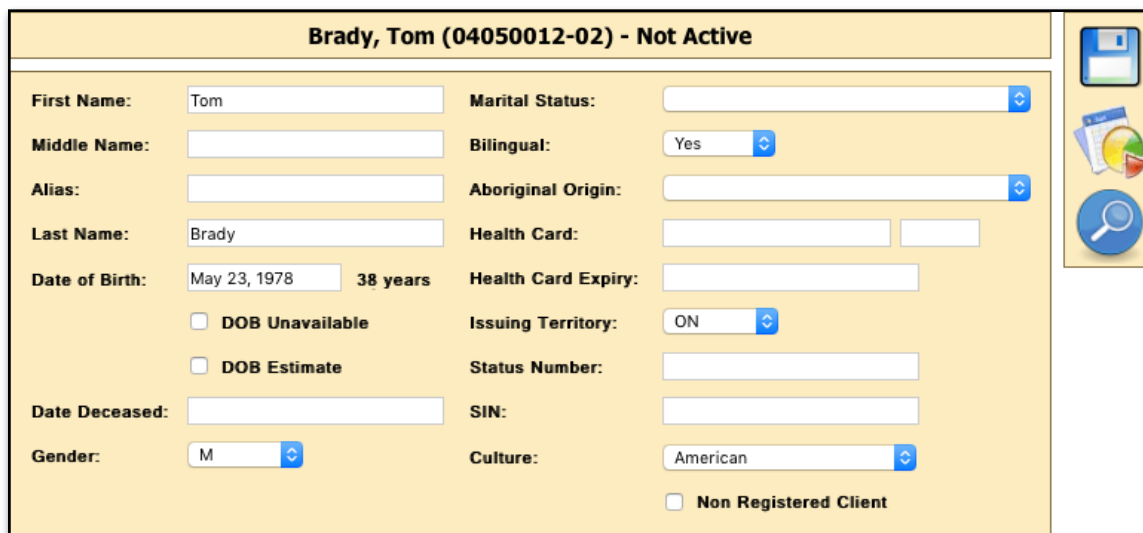
The image shows a client profile form for 'Brady, Tom (04050012-02) - Not Active'. The form is divided into two columns. The left column contains fields for First Name (Tom), Middle Name, Alias, Last Name (Brady), Date of Birth (May 23, 1978, 38 years), Gender (M), and Date Deceased. The right column contains fields for Marital Status, Bilingual (Yes), Aboriginal Origin, Health Card, Health Card Expiry, Issuing Territory (ON), Status Number, SIN, and Culture (American). There are also checkboxes for 'DOB Unavailable', 'DOB Estimate', and 'Non Registered Client'. A 'Save' button is visible in the top right corner of the form.

Figure 222 - Modifying a 'Not Active' Client by Toggling

7. Make the desired changes and when satisfied, click **Save** to finalize the process.
8. The client file 'status' is automatically set back to 'Not Active' upon closing the chart.

Re-Activating a Client

Should the client return to the agency at a later date, users can simply re-activate the client file to keep all pertinent information stored together.

1. Refer to page 14 for how to login to CRMS Web.
2. Refer to page 17 for how to access the CRMS Search Engine.
3. Perform a search to locate the client whom will be re-activated.
4. In this example, the user has located the file for 'Alex Kauffman' who is currently 'Not Active'.

The screenshot shows the CRMS Web interface. On the left, the search criteria are: Search Type: Demographics, Search By: Last Name, Is Like: kaufft, and Active Only is unchecked. On the right, a yellow box displays the client information for Alex Kauffman: Birthdate: May 6, 1976, Client Number: 04055415, Status: Not Active, and Admission: 1.

Figure 223 -Locating 'Not Active' Client to Re-Activate

5. Click on the desired client file to bring up the Entity Actions menu as shown below.

The screenshot shows the CRMS Web interface with the Entity Actions menu open for Alex Kauffman. The menu options are: Contact History, Form History, Information & Referral, Manage Groups, Merge Client Into, New Client, Reactivate Client (highlighted with a red circle), Service Summary, and View Client. The search criteria on the left are the same as in Figure 223.

Figure 224 - Re-Activating Client File



Re-activating a client file requires an access right. Should the user not see 'Reactivate Client' in the list, they are missing the access right.

6. Click **Reactivate Client** to continue the process.
7. The **Reactivate Client Dialog** will appear as demonstrated below in Figure 225.

Reactivate Client 04055415

First Name: Alex

Last Name: Kauffman

Birthdate: May 06, 1976

Birthdate Unavailable: ☐

Gender: Male

Activation Date: May 03, 2016

Referral Source:

Program:

Diagnostic Category:

Continue Cancel

Figure 225 - Reactivate Client Dialog

8. Fill out the necessary information and when satisfied, click **Continue** to finalize the process.
9. Figure 226 illustrate the Reactivate Client Dialog prior to clicking **Continue**.

Reactivate Client 04055415

First Name: Alex

Last Name: Kauffman

Birthdate: May 06, 1976

Birthdate Unavailable: ☐

Gender: Male

Activation Date: May 03, 2016

Referral Source: Community Mental Health Agency

Program: Case Management

Diagnostic Category: Anxiety Disorder

Continue Cancel

Figure 226 - Reactivate Client Dialog

10. Upon clicking Continue, the CRMS system will automatically generate the next referral for this client.
11. The system will then automatically navigate to the newly re-activated client file.
12. This is shown in Figure 227.

CRMS Web Mobile Dev System Client Chart | View ▼ | Christian Gosselin ▼

Search...

Kauffman, Alex (04055415-02) - Active

Demographics

First Name: Alex Marital Status:

Middle Name: Bilingual: Yes

Alias: Aboriginal Origin:

Last Name: Kauffman Health Card:

Date of Birth: May 06, 1976 40 years Health Card Expiry:

☐ DOB Unavailable ☐ DOB Estimate Issuing Territory: ON

Date Deceased: Status Number:

Gender: M SIN:

Culture:

☐ Non Registered Client

First Nation: First Nation Affiliation:

First Nation Status:

Home Phone: Unknown ☐ No Messages ☐ Permission to Contact

Work Phone: Unknown ☐ No Messages ☐ Permission to Contact

Alternate Phone: Unknown ☐ No Messages ☐ Permission to Contact

Email: Unknown ☐ No Messages ☐ Permission to Contact

Figure 227 - Successfully Reactivated Client

13. Note in Figure 227 above that the client file number has now been incremented and shows as 'Active'.
14. The client has also automatically received a 'pending assessment' transaction for the program selected on the 'Reactivate Client Dialog'.

CRMS Web Mobile Dev System Client Chart | View ▼ | Christian Gosselin ▼

◀ Back

Kauffman, Alex (04055415-02) - Active

Referral Source: Community Mental Health Agency Referred By:

Address: Phone: Ext:

Case Management
Pending Assessment: May 3, 201

Figure 228 - Confirming Reactivation Process

Accessing Task Pane

Staff can easily review their inputted workload data to ensure their accountability in the software.

1. Review page 14 in order to login to the CRMS system.
2. Once logged in, click on your name located in the upper right hand order as identified in Figure 229 below.

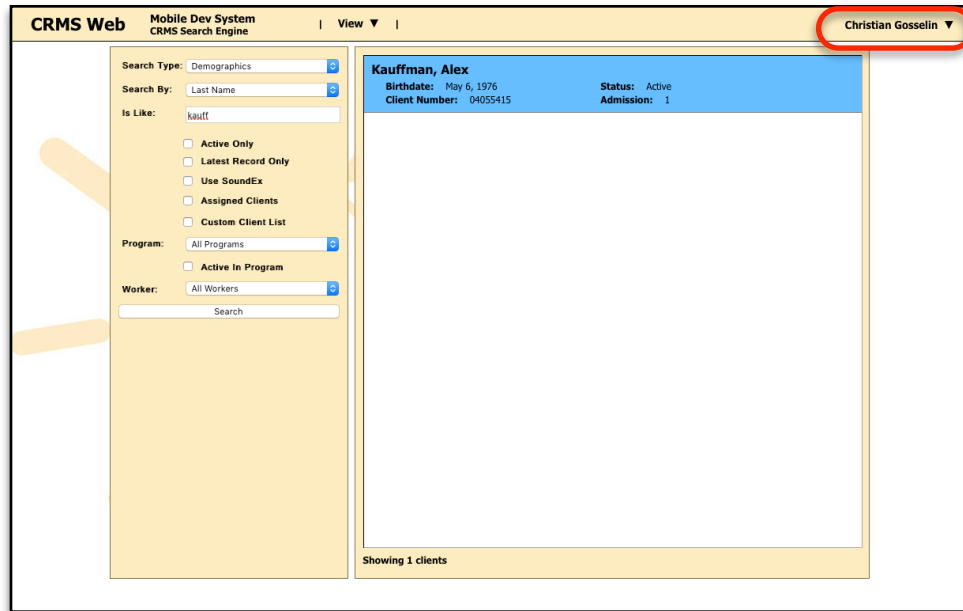


Figure 229 - Reviewing Worker Summary

3. Select **Task Pane** as shown in Figure 230.

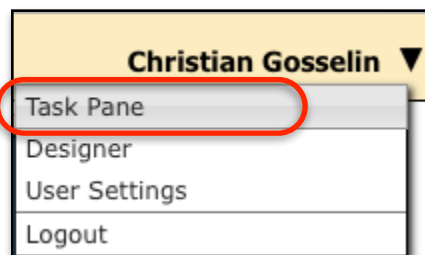


Figure 230 - Accessing Task Pane



Contact your CRMS Administrator should the Task Pane not appear in your list. Access right must be granted to the Task Pane.

4. The Task Pane will then appear on screen as demonstrated in Figure 231.

Reviewing Workflow Task Pane

5. Note in Figure 231 below, the **Workflow Task Pane** is being displayed.

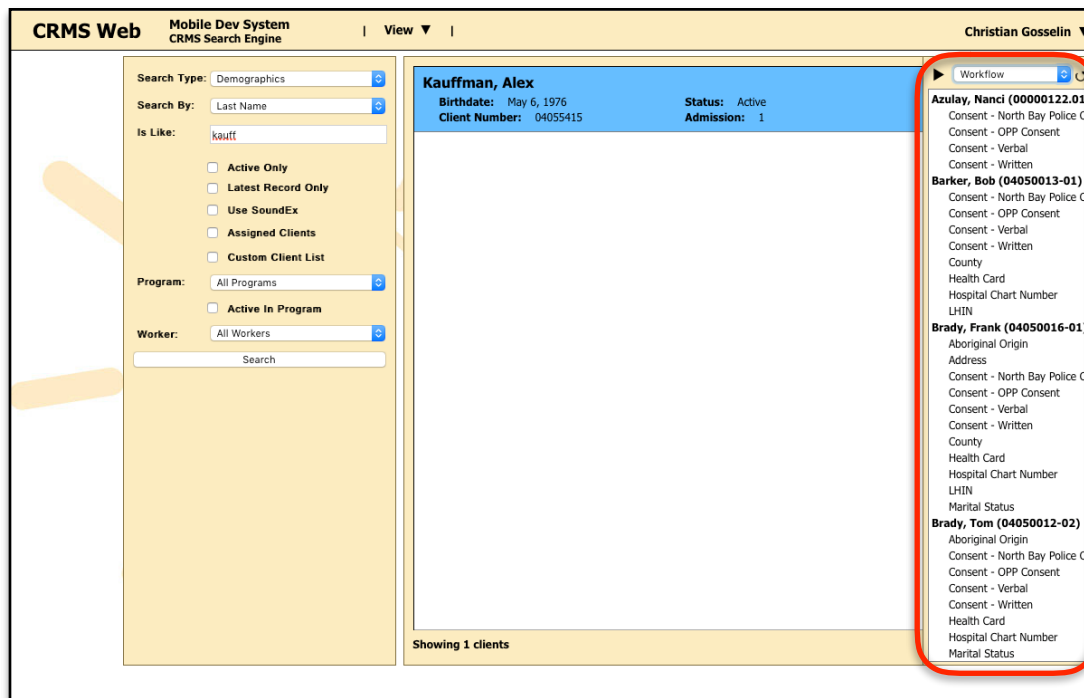


Figure 231 - Task Pane

Reviewing Worker Summary Task Pane

6. Click on the drop down menu illustrated in Figure 232 to select the **Worker Summary Task Pane**.

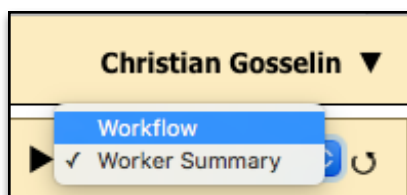


Figure 232 - Selecting Worker Summary Task Pane

7. The Task Pane will then automatically refresh and the Worker Summary Pane will be displayed.

8. This is demonstrated on the following page.



Note that both the Workflow and Worker Summary Task Pane are individual access rights. Either or both can be granted to a user group.

9. As can be seen in Figure 233, the Workflow and Worker Summary Task Panes are displayed in detail.

Christian Gosselin ▼

▶ Workflow ◀ ▶ ↻

Azulay, Nanci (00000122.01)
 Consent - North Bay Police Co
 Consent - OPP Consent
 Consent - Verbal
 Consent - Written

Barker, Bob (04050013-01)
 Consent - North Bay Police Co
 Consent - OPP Consent
 Consent - Verbal
 Consent - Written
 County
 Health Card
 Hospital Chart Number
 LHIN

Brady, Frank (04050016-01)
 Aboriginal Origin
 Address
 Consent - North Bay Police Co
 Consent - OPP Consent
 Consent - Verbal
 Consent - Written
 County
 Health Card
 Hospital Chart Number
 LHIN
 Marital Status

Brady, Tom (04050012-02)
 Aboriginal Origin
 Consent - North Bay Police Co
 Consent - OPP Consent
 Consent - Verbal
 Consent - Written
 Health Card
 Hospital Chart Number
 Marital Status

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▶ Worker Summary ◀ ▶ ↻

From: May 02, 2016

To: May 02, 2016

Compensation	
Total Time (min):	0
Count:	0
Direct Face to Face	
Total Time (min):	60
Count:	1
Direct Other	
Total Time (min):	0
Count:	0
Direct Telephone	
Total Time (min):	0
Count:	0
Indirect	
Total Time (min):	0
Count:	0
Information & Referral	
Total Time (min):	0
Count:	0
Staff Time	
Total Time (min):	0
Count:	0
Summary	
Total Time (min):	60
Total Time (hrs):	1.00
Count:	1

The Workflow Tasks displays data which has not yet been inputted in the CRMS system. These tasks have been identified as mandatory by your CRMS Administrator. Ensure they get completed when possible.

The Worker Summary displays time inputted into the CRMS system between the "From" and "To" dates. Adjust these as necessary in order to review across a larger date range.

Figure 233 - Workflow and Worker Summary Task Pane

MyAssistant

The MyAssitant module allows CRMS users to send confidential and PHIPA compliant messages to other CRMS users who are logged into the software. Messages can even contain a link directly to the chart should two workers be discussing a particular item of importance in the clients' file.

1. Review page 14 in order to login to the CRMS system.
2. Once logged in, click on your name located in the upper right hand order as identified in Figure 234 below.

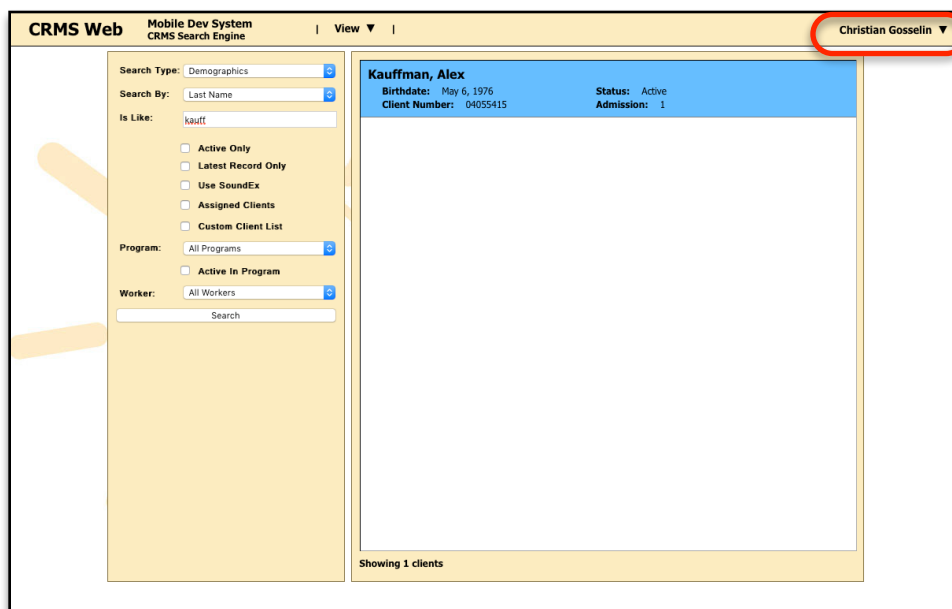


Figure 234 - Accessing MyAssistant

3. Select **MyAssistant** as shown in Figure 235.

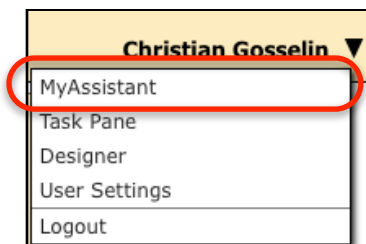


Figure 235 - Accessing MyAssistant



Contact your CRMS Administrator should the MyAssistant not appear in your list. Access right must be granted to the MyAssistant.

4. The MyAssistant module will then be loaded on screen as illustrated in Figure 236.

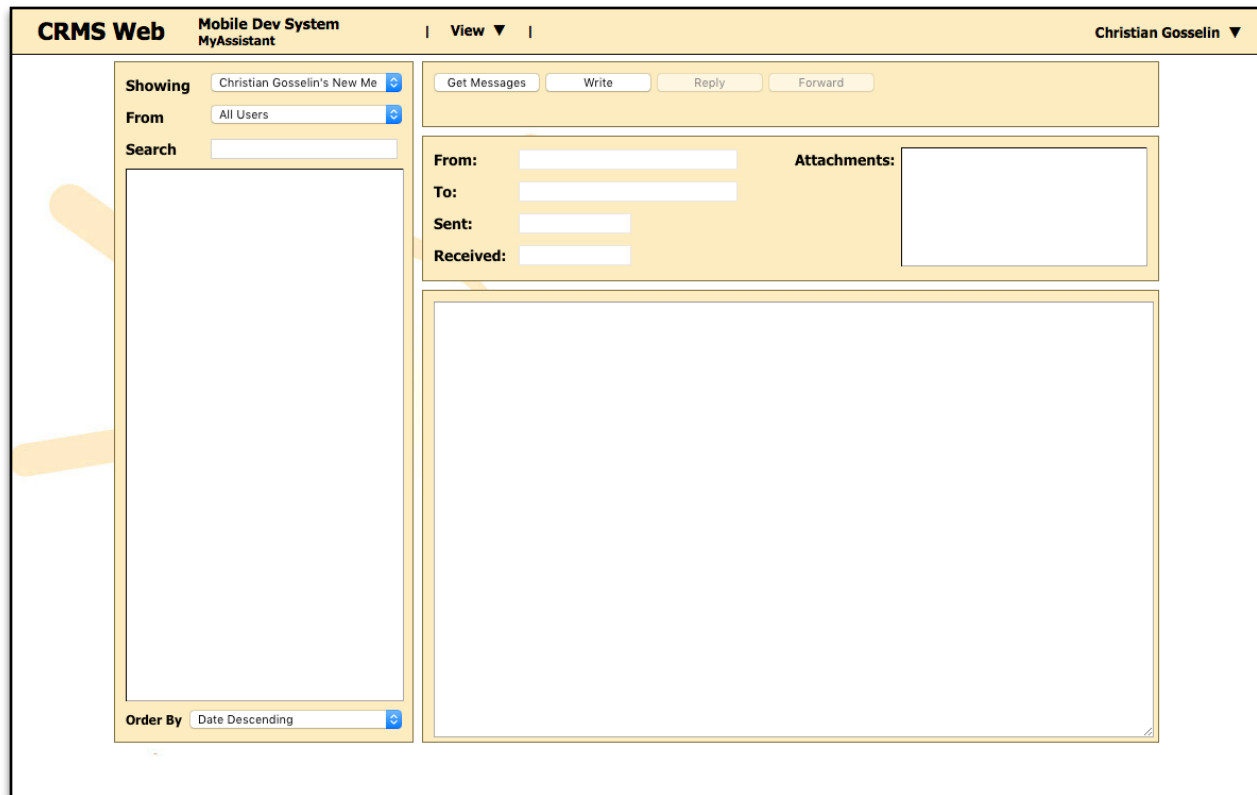


Figure 236 - MyAssistant Module

Writing a New Message

1. Access the MyAssistant module as described above on page 114.
2. Click the **Write** button as shown in Figure 237.



Figure 237 - Writing a New Message

3. The **New MyAssistant Message** dialog will then appear on screen. This is demonstrated on the following page in Figure 238.

- Click on the **green “+”** beside the desired name to add them to the recipients.

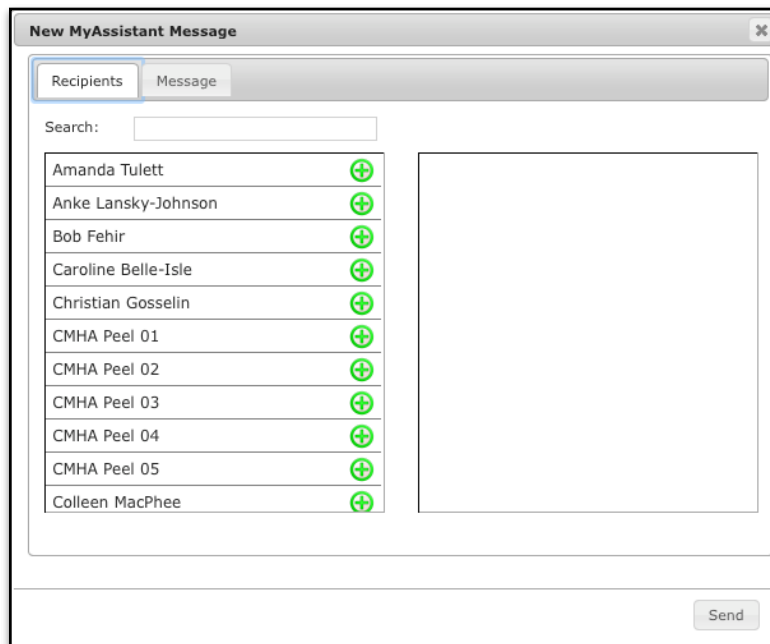


Figure 238 - New MyAssistant Message Dialog

- Users can also type the desired name in the **Search** text box in order to filter more quickly. Both of these actions are demonstrated in Figure 239 below.

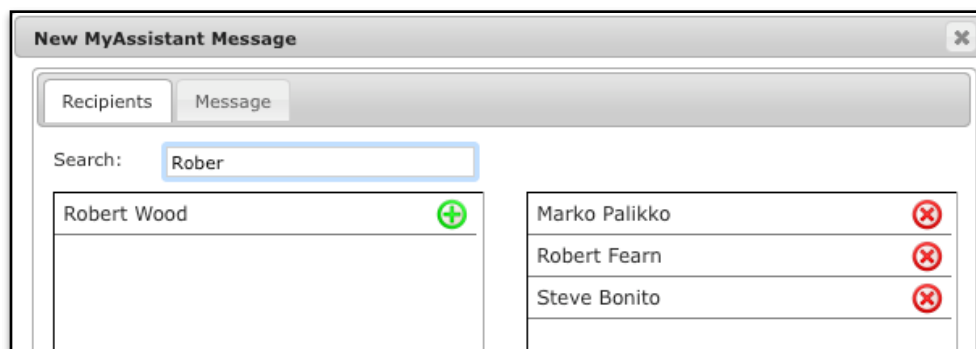


Figure 239 - Adding Recipients / Filtering for a Desired Recipient

- If a name as been accidentally added, click on the **red “x”** beside the name to remove them from the message.
- Click on the **Message** tab as indicated below to type the body of the message.

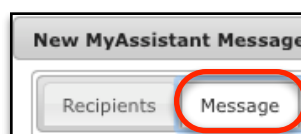
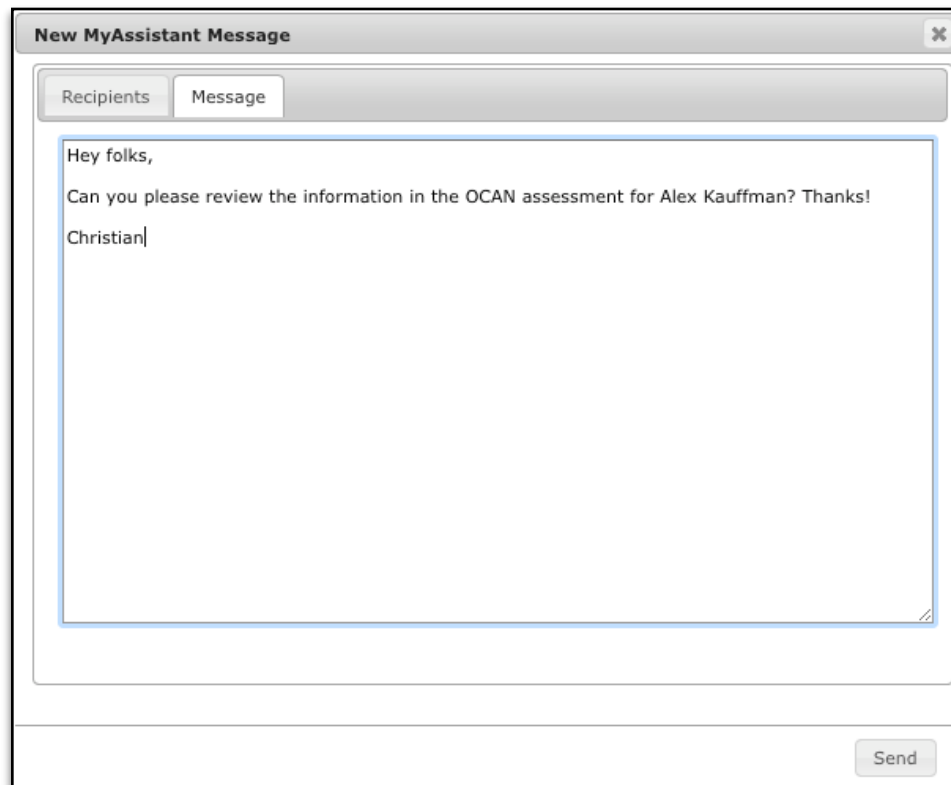


Figure 240 - Writing Message Body

8. Add the desired body to the MyAssistant message. This is illustrated in Figure 241 below.



The screenshot shows a window titled "New MyAssistant Message". It has two tabs: "Recipients" and "Message". The "Message" tab is active, displaying a text input area. The text entered is "Hey folks, Can you please review the information in the OCAN assessment for Alex Kauffman? Thanks! Christian|". A "Send" button is located at the bottom right of the window.

Figure 241 - Adding Body to MyAssistant Message

9. Click **Send** when satisfied with both the recipients and the body of your message.
10. The New MyAssistant window will automatically close after successfully sending the message.

Reviewing Sent Messages

1. Refer to page 114 on how to access the MyAssistant module.
2. From the **Showing** menu, select **Sent Messages** as demonstrated in Figure 242.

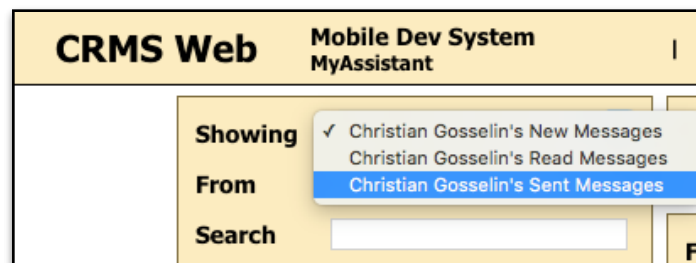


Figure 242 - Reviewing Sent Messages

3. The MyAssistant module will then refresh and display a list of sent messages as shown in Figure 243 below.

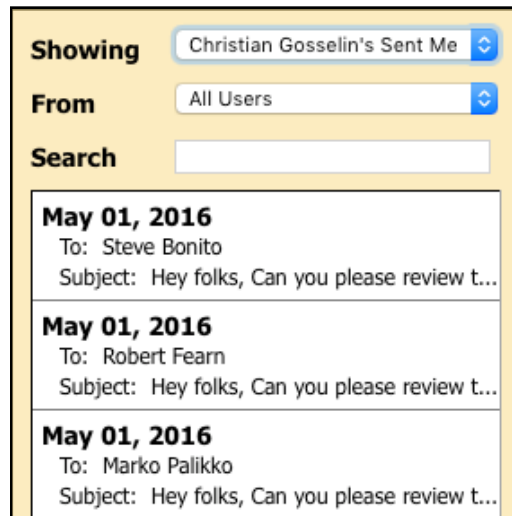


Figure 243 - Reviewing Sent Messages

4. Click on the desired message in order to see the content.

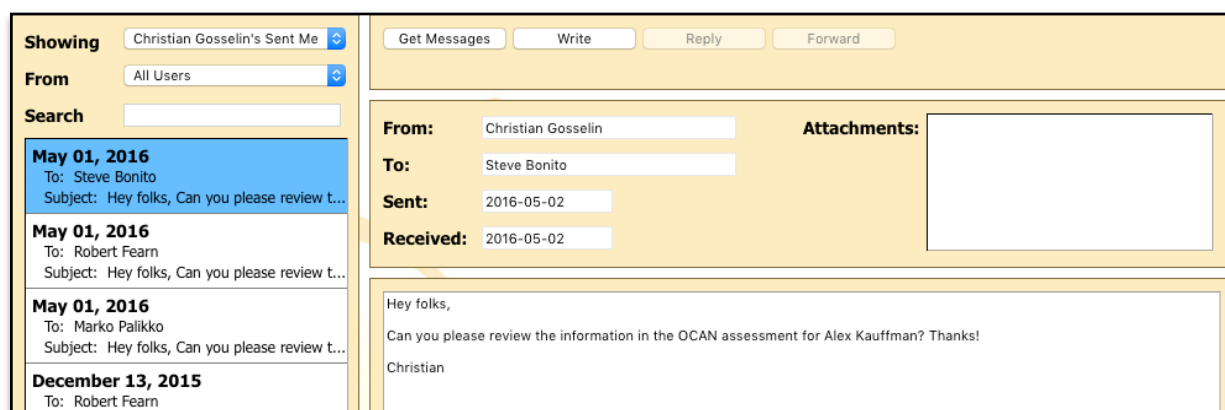


Figure 244 - Reviewing Particular Message

Reviewing Previous Messages

5. Repeat the steps listed above and ensure to select either **New** or **Read** messages from the "Showing" menu.



Figure 245 - Reviewing New or Read Messages

Login Notifications

1. When logging into CRMS, should an unread MyAssistant message exist for the user, a notification will be presented as shown in Figure 246.

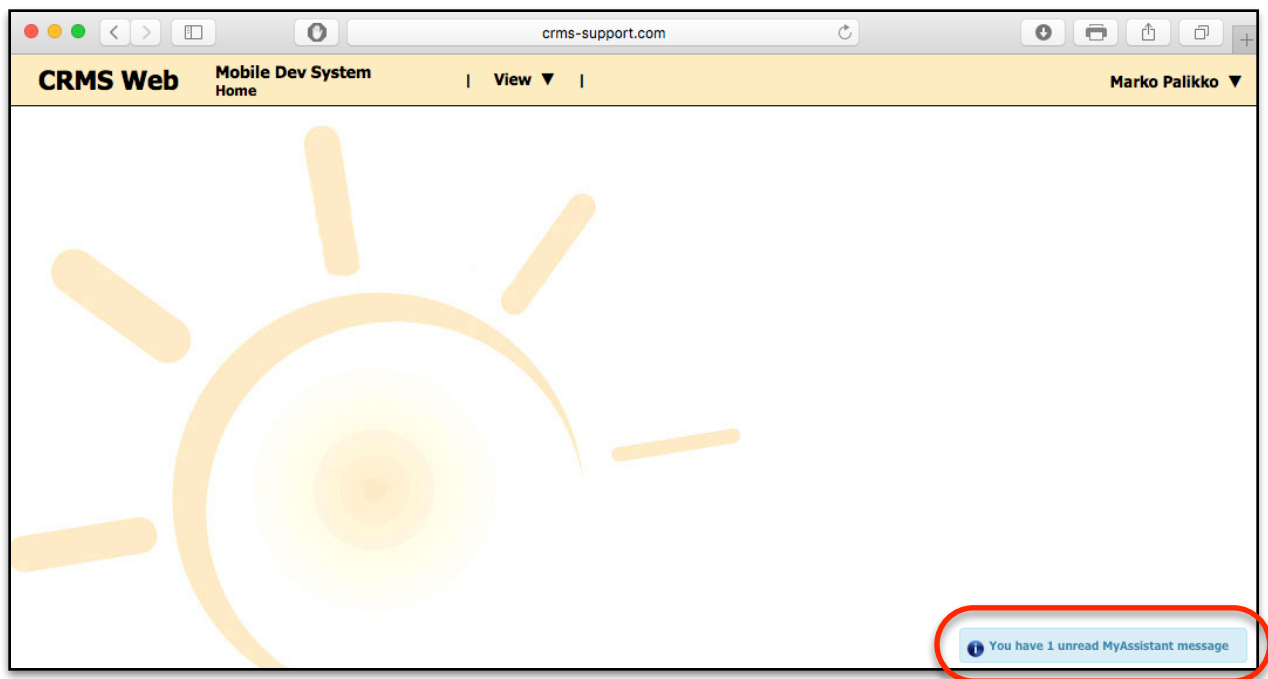


Figure 246 - New Message Notification

2. Repeat the steps listed above in order to review the new message.

Messages with Attachments

1. Certain messages might contain attachments. Verify the **Attachments** section of the MyAssistant module as shown in Figure 247.

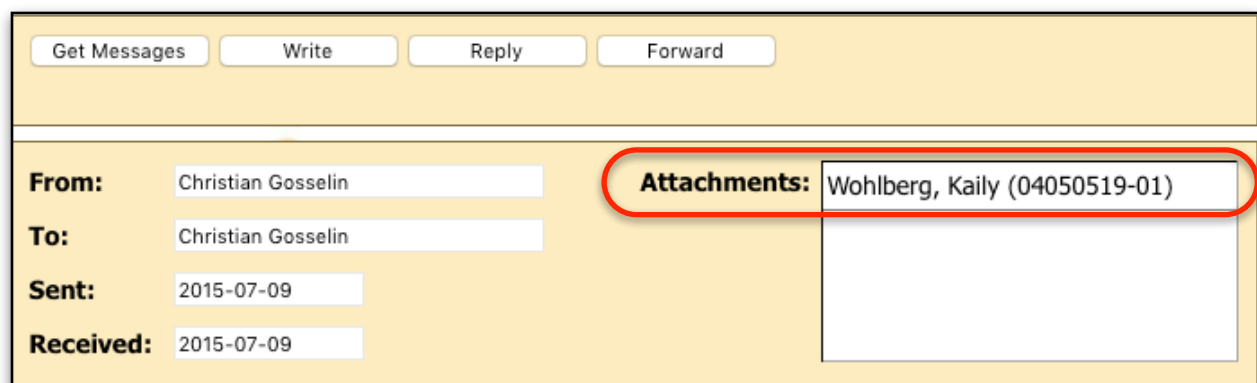


Figure 247 - Message with an Attachment

2. Click on the client's name which has been attached to the message to bring up the Client Shortcut as shown in Figure 248.

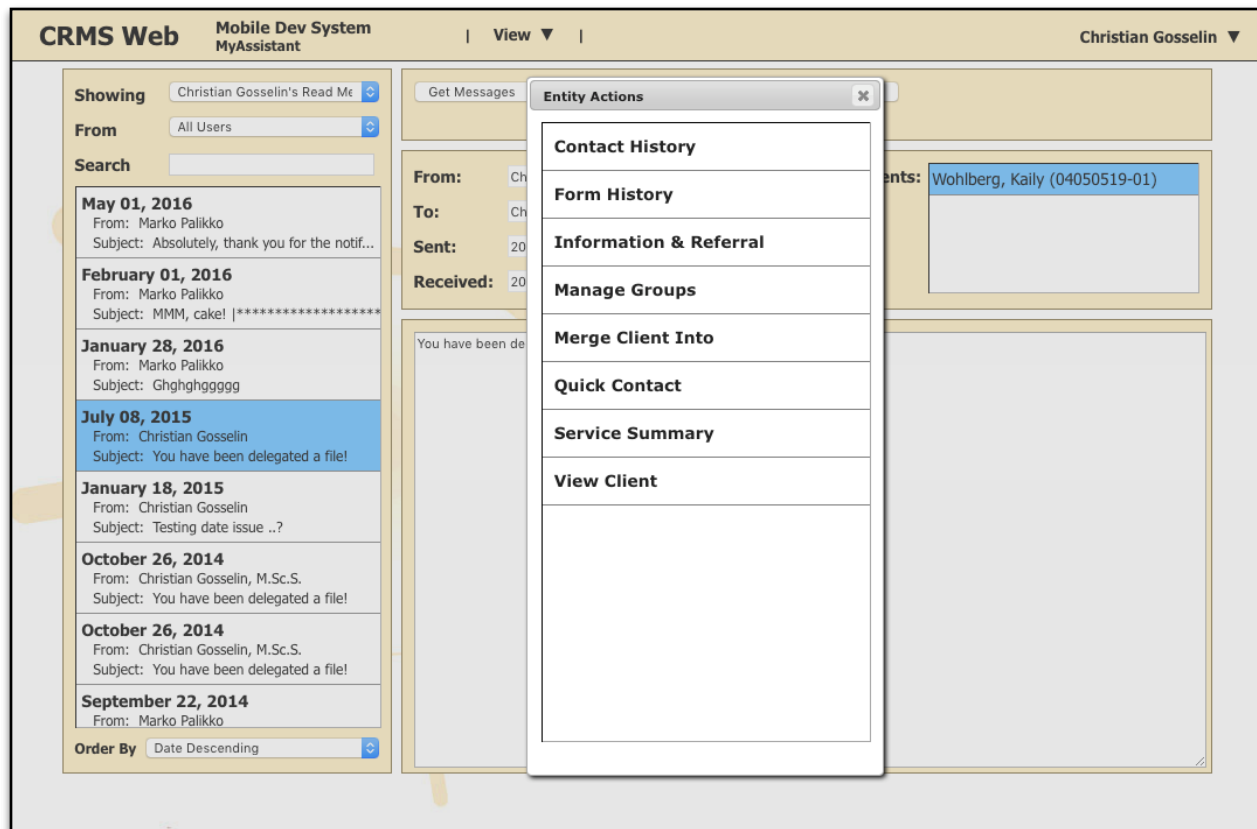


Figure 248 - Accessing All Aspects of Client Chart from Message



****TIPS AND TRICKS* - From this menu, any areas of the client's chart can quickly be accessed. Click on the desired item to review further.***

Information & Referral (Registered Client)

There are instances where a worker might provide information & referral services to a registered CRMS client. If this is the case, follow the instructions below.

1. Locate the client using the CRMS Search Engine as described on page 16.
2. Click on the desired client to display the client shortcut menu.
3. Click **Information & Referral** as illustrated below.

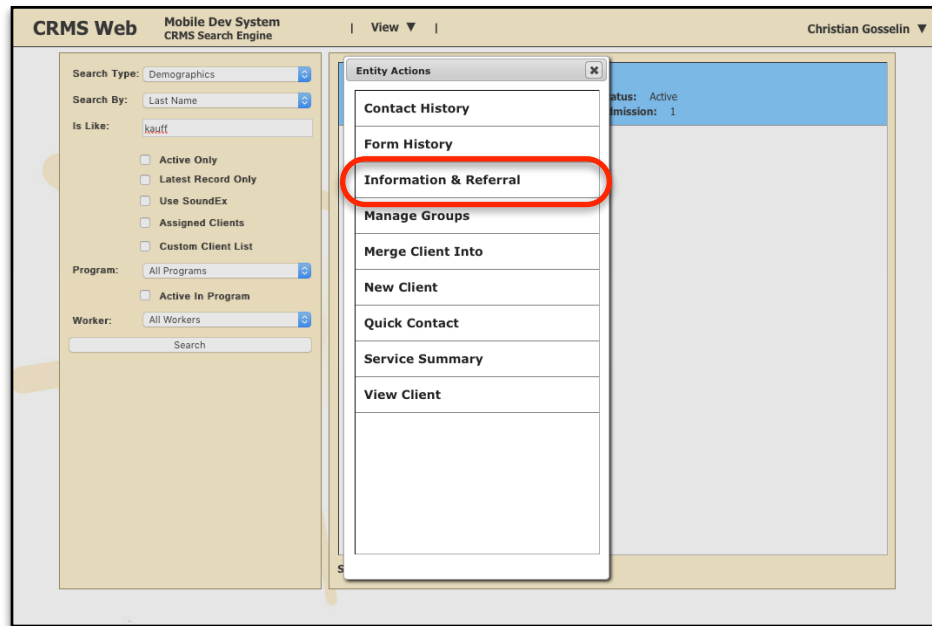


Figure 249 - Information & Referral (Registered Client)

4. The Information & Referral dialog will be loaded on screen.

A screenshot of the 'Information & Referral' dialog box. The title bar reads 'Information & Referral - Kauffman, Alex (04055415-01)'. The form contains the following fields: 'Date' (May 02, 2016), 'Program' (dropdown), 'Duration' (dropdown), 'Language' (dropdown), 'Gender' (dropdown), 'Caller Description' (dropdown), 'Reason' (dropdown), 'Related To' (dropdown), 'Diagnosis' (dropdown), 'Referred From' (dropdown), 'Referred To' (dropdown), 'Note' (text area), 'Time' (dropdown), 'Area/City' (dropdown), 'Age Group' (dropdown), 'Contact Type' (dropdown), 'Culture' (dropdown), 'Phone' (text field), 'Num. Participants' (0), and a checkbox for 'On behalf of Non-Registered Service Recipient'. At the bottom right are 'Save' and 'Cancel' buttons.

Figure 250 - Information & Referral (Registered Client)

5. Fill out the necessary details. Figure 251 below illustrates the module prior to saving.

Information & Referral - Kauffman, Alex (04055415-01)

Date: May 02, 2016

Program: Addictions Time: Regular Hours

Duration: 20 Area/City: Kingston

Language: English Age Group: Adult

Gender: Male Contact Type: Face to Face

Caller Description: Family Member Culture:

Reason: Looking for self-help, support groups Phone:

Related To: Addictions Num. Participants: 0

Diagnosis:

Referred From: Family or Friend On behalf of Non-Registered Service Recipient ☐

Referred To: Community Mental Health Program

Note: Chatted with Alex about services for his sister.

Save Cancel

Figure 251 - Information & Referral (Registered Client)

6. When satisfied with the inputted information, click **Save** to finalize the process.
7. A message will appear to confirm the process was successful.



Figure 252 - Successfully Saved I&R

8. Refer to page 32 for how to review Information & Referral data.

Information & Referral (Non-Registered Client)

There are instances where a worker might provide information & referral services to a non-registered individual. If this is the case, follow the instructions below.

1. Locate the client using the CRMS Search Engine as described on page 16.
2. Change the Search Type to **Information & Referral** as shown in Figure 253.

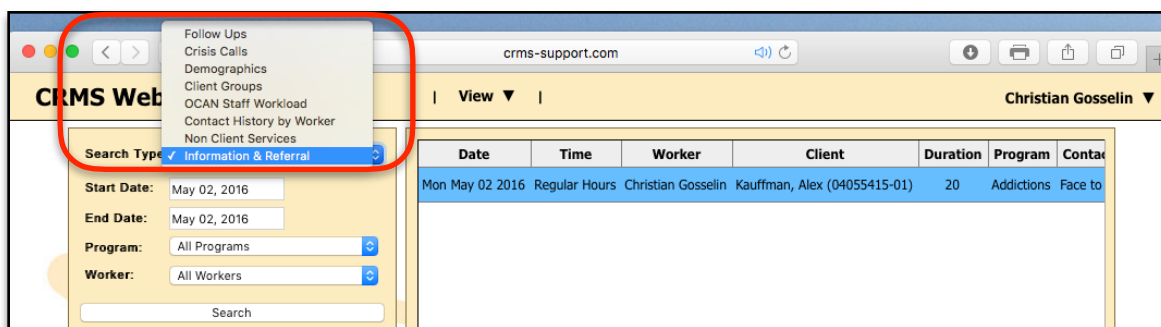


Figure 253- Changing Search Type to Information & Referral

3. Click in the empty area to bring up the following menu.

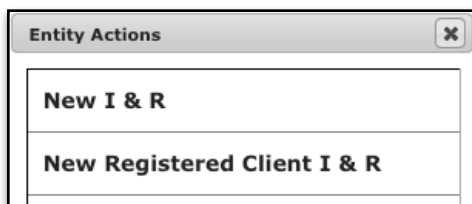


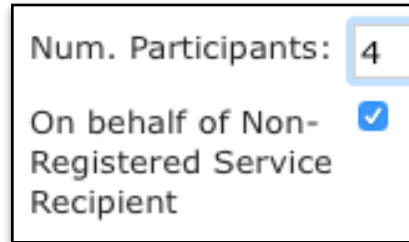
Figure 254 - Information & Referral (Non-Registered Client)

4. Click **New I & R**.
5. The Information & Referral module will then appear on screen.

A screenshot of the 'Information & Referral' form. It contains various input fields for client information: 'Date' (May 02, 2016), 'Program' (Case Management), 'Duration' (dropdown), 'Language' (dropdown), 'Gender' (dropdown), 'Caller Description' (dropdown), 'Reason' (dropdown), 'Related To' (dropdown), 'Diagnosis' (dropdown), 'Referred From' (dropdown), 'Referred To' (Community Mental Health Program), 'Time' (dropdown), 'Area/City' (dropdown), 'Age Group' (dropdown), 'Contact Type' (dropdown), 'Culture' (dropdown), 'Phone' (text), 'Num. Participants' (0), 'On behalf of Non-Registered Service Recipient' (checked), and a 'Note' text area. 'Save' and 'Cancel' buttons are at the bottom right.

Figure 255 - Information & Referral (Non Registered Client)

6. Fill out the necessary information. Ensure that the **On Behalf of Non Registered Service Recipient** check mark has been check off as shown below.
7. If there was more than one participant, input the number in the **Num. Participants** field.

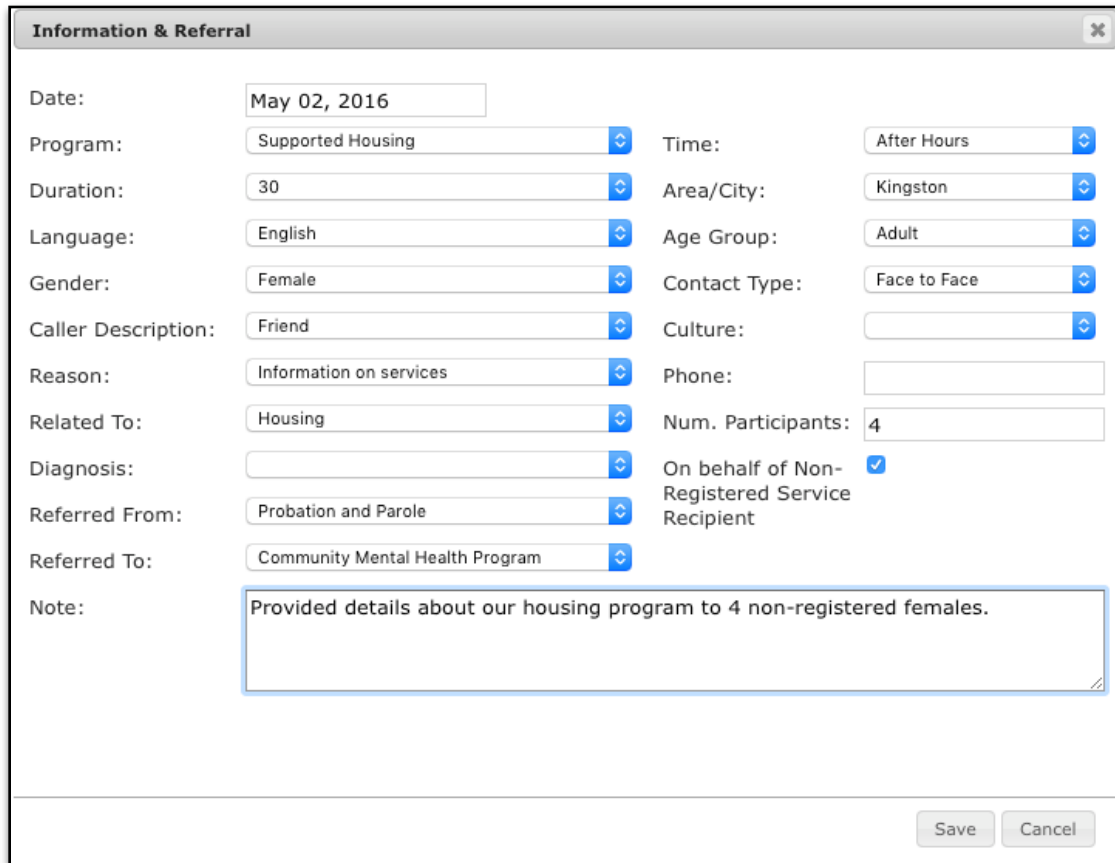


Num. Participants: 4

On behalf of Non-Registered Service Recipient ☒

Figure 256 - Information & Referral (Non Registered Client)

8. Figure 257 demonstrates the Information & Referral module prior to saving.



Information & Referral

Date: May 02, 2016

Program: Supported Housing

Duration: 30

Language: English

Gender: Female

Caller Description: Friend

Reason: Information on services

Related To: Housing

Diagnosis:

Referred From: Probation and Parole

Referred To: Community Mental Health Program

Note: Provided details about our housing program to 4 non-registered females.

Time: After Hours

Area/City: Kingston

Age Group: Adult

Contact Type: Face to Face

Culture:

Phone:

Num. Participants: 4

On behalf of Non-Registered Service Recipient ☒

Save Cancel

Figure 257 - Information & Referral Prior to Saving

User Settings

CRMS users can modify their own individual user settings to offer a more customized CRMS Web experience.

1. Refer to page 14 above for how to login to CRMS Web.
2. Click on your name to display the list shown below in Figure 258. Click **User Settings** as illustrated.

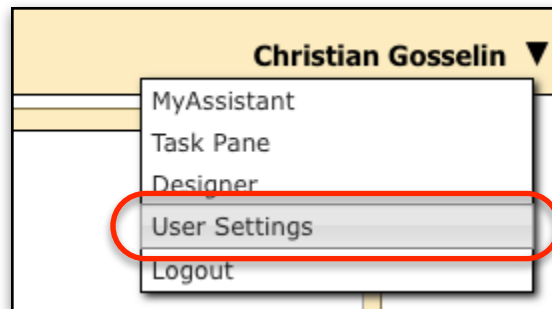
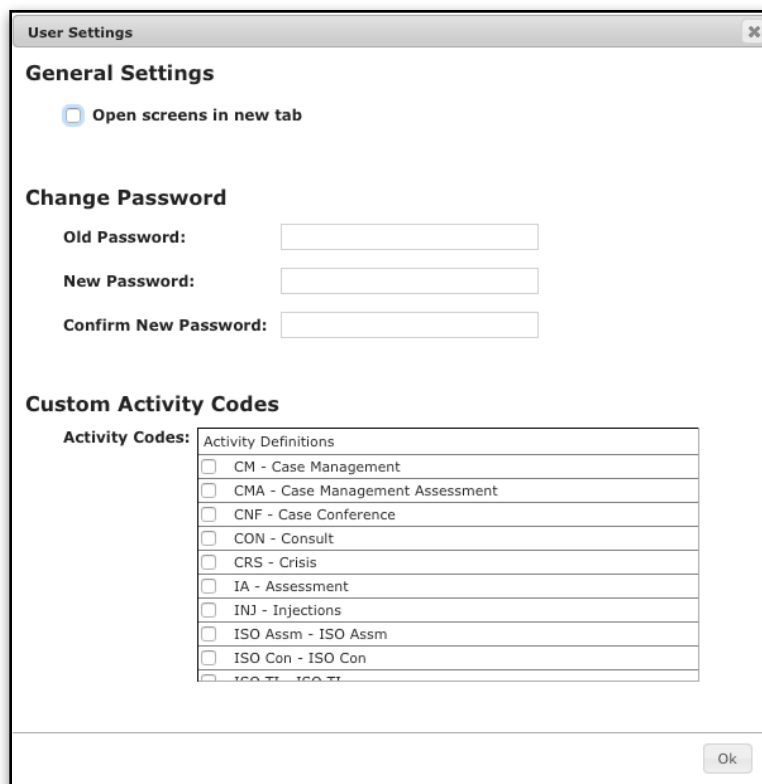


Figure 258 - Accessing User Settings

3. The User Settings module will then appear on screen.

A screenshot of the 'User Settings' module window. The window has a title bar with 'User Settings' and a close button. The main content area is divided into three sections: 'General Settings', 'Change Password', and 'Custom Activity Codes'.
General Settings: Contains a checkbox labeled 'Open screens in new tab' which is currently unchecked.
Change Password: Contains three input fields labeled 'Old Password:', 'New Password:', and 'Confirm New Password:'.
Custom Activity Codes: Contains a section titled 'Activity Codes:' followed by a table with two columns: 'Activity Definitions' and a checkbox column. The table lists several activity codes with their corresponding checkboxes:

Activity Definitions	
CM - Case Management	☐
CMA - Case Management Assessment	☐
CNF - Case Conference	☐
CON - Consult	☐
CRS - Crisis	☐
IA - Assessment	☐
INJ - Injections	☐
ISO Assm - ISO Assm	☐
ISO Con - ISO Con	☐
ISO TL - ISO TL	☐

At the bottom right of the window is an 'Ok' button.

Figure 259- User Settings Module

Open Screens in New Tab

If desired, users can have modules opened in a **new tab** versus constantly navigating to and from various modules. This can allow a user to perform multi-tasking and have several modules open concurrently at the same time.

1. Repeat the steps listed above on page 125 in order to access User Settings.
2. Check off the **Open Screens in New Tab** checkmark as demonstrated in Figure 260.

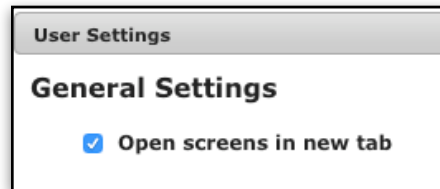


Figure 260 - Open Screens in New Tab

3. Click **Ok** to finalize the process.
4. A message will confirm the process was successful.

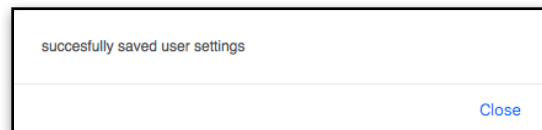


Figure 261 - Successfully Saved User Settings

5. When attempting to open a new module from this point forward, all subsequent modules will open in their own respective tabs inside the web browser. Figure 262 below illustrates only one tab open.

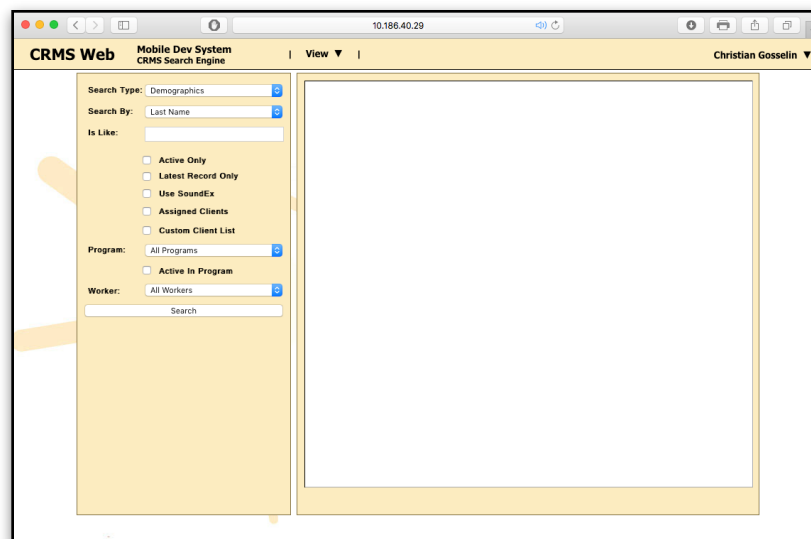


Figure 262 - Only One Tab Open

6. Figure 263 below demonstrates two tabs open in the same web browser window.

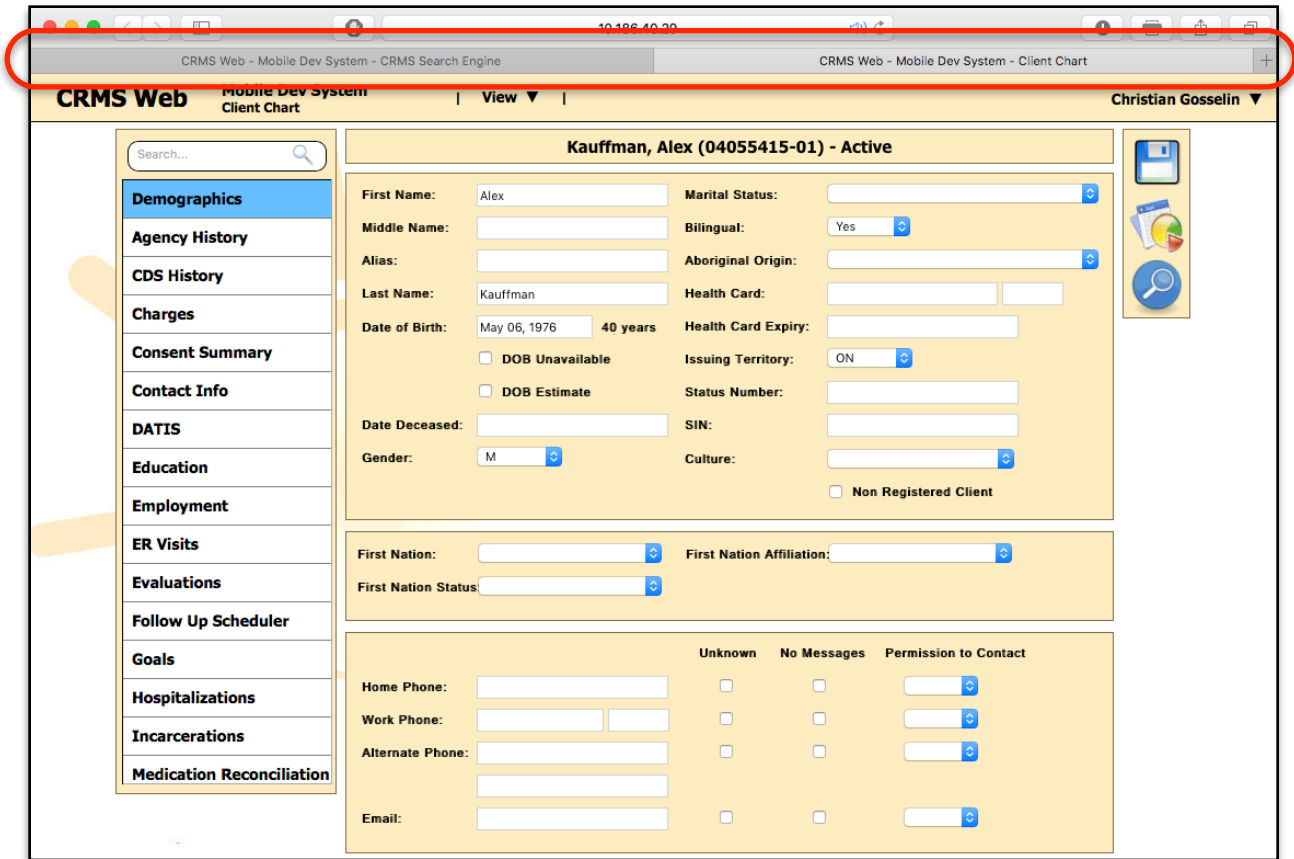


Figure 263 - Two Tabs Open

7. Repeat the same steps listed above to de-activate the **Open Screens in New Tab**.

Change Password

1. In order to reset your password, repeat the steps listed above on page 125 for how to access the User Settings.
2. Input your old password, new password and confirm the new password as shown in Figure 264.

Change Password

Old Password:

.....

New Password:

.....

Confirm New Password:

.....|



Figure 264 - Changing Password

3. Once satisfied with the changes, click **Ok** to continue.
4. A message will appear confirming the change was indeed successful.

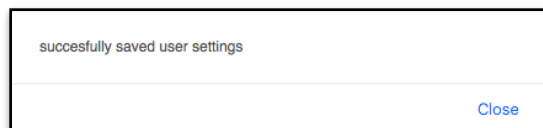


Figure 265 - Successfully Saved User Settings

Custom Activity Codes

1. Users can also customize their list of activity codes. Rather than seeing the entire list provided by the CRMS Administrator, they can customize to only see the codes they use on a daily basis.
2. Access the User Settings module as described above on page 125.
3. Navigate to the **Custom Activity Codes** section as demonstrated below in Figure 266.

Custom Activity Codes	
Activity Codes:	Activity Definitions
	☐ CM - Case Management
	☐ CMA - Case Management Assessment
	☐ CNF - Case Conference
	☐ CON - Consult
	☐ CRS - Crisis
	☐ IA - Assessment
	☐ INJ - Injections
	☐ ISO Assm - ISO Assm
	☐ ISO Con - ISO Con
	☐ ISO TL - ISO TL

Figure 266 - Custom Activity Codes

4. As can be seen in Figure 266 above, the user has yet to configure their custom activity codes.
5. Check off the desired codes. This is illustrated in Figure 267.

Custom Activity Codes	
Activity Codes:	Activity Definitions
	☐ CM - Case Management
	☒ CMA - Case Management Assessment
	☐ CNF - Case Conference
	☒ CON - Consult
	☐ CRS - Crisis
	☐ IA - Assessment
	☒ INJ - Injections
	☐ ISO Assm - ISO Assm
	☐ ISO Con - ISO Con
	☐ ISO TL - ISO TL

Figure 267 - Selecting Custom Activity Codes

6. Click **Ok** when satisfied with the changes. A message will appear to confirm that the process was indeed successful.

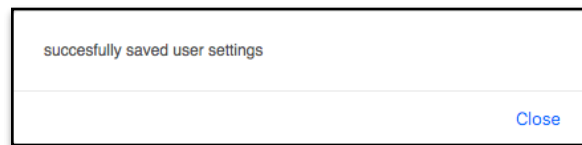


Figure 268 - Successfully Saved User Settings

7. When accessing the Quick Contact module from this point forward, only the selected custom activity codes will appear. This is shown in Figure 269.

Figure 269 - Custom Activity Codes in the Quick Contact Module

8. This change also affects the Contact History module as seen in Figure 270.

Figure 270 - Custom Activity Codes in the Quick Contact Module

Consent Summary

The Consent Summary modules allows users to input any consents, whether verbal or written into the clients' file. These consents are then used by the "Service Summary" module to provide a quick overview of any consents in a client's file.

1. Access the CRMS Search Engine as described above on page 16.
2. Locate the desired client and open their chart.
3. From the list of modules, click on **Consent Summary** as shown below.

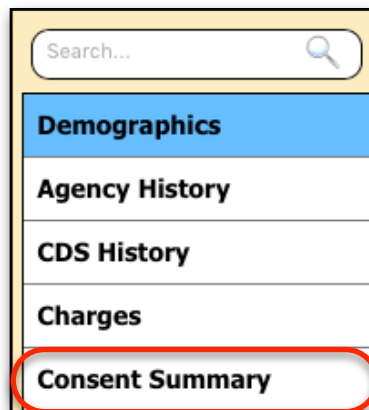


Figure 271 - Accessing Consent Summary

4. The Consent Summary module will then appear on screen.

A screenshot of the 'Consent Summary' module for a client named 'Kauffman, Alex (04055415-02) - Active'. The interface has a yellow background. At the top left, there is a red box with the text 'NO CURRENT RELEASES'. Below this are several input fields: 'Type:' with a dropdown arrow, 'Date:', 'Consent To', 'Expiry Date:', 'Contact', and 'Never Expires' (a checkbox). There is also a 'Revoke Date:' field. Below these fields is a large text area labeled 'Description of Consent/Restrictions:'. At the bottom, there is a table with columns: 'Admission', 'Type', 'Initiated', 'Expired', 'Revoked', 'Consent To', and 'File Name'. Below the table is a checkbox labeled 'Show for all admissions'.

Figure 272- Consent Summary Module



Should a user not see the "Consent Summary" module, verify their access rights.

- Fill out the necessary drop downs as shown in Figure 273.

NO CURRENT RELEASES

Type: Verbal Date: May 18, 2016

Consent To: Dr. Jones Expiry Date: May 18, 2017

Contact: 613-562-9635 ☐ Never Expires

Revoke Date:

Description of Consent/Restrictions: able to discuss medical plan with doctor

Figure 273 - Inputting Data into Consent Summary Module

- Once satisfied with the changes, click **Save** to finalize the process. The consent will then be saved and appear in the review area below. This is demonstrated below.

CURRENT RELEASES EXIST

Type: Date:

Consent To: Expiry Date:

Contact: ☐ Never Expires

Revoke Date:

Description of Consent/Restrictions:

Admission	Type	Initiated	Expired	Revoked	Consent To	File Name
2	Verbal	18-May-2016	18-May-2017		Dr. Jones	

☐ Show for all admissions

Figure 274 - Successfully Saved Consent

- Note in Figure 274 above, that the “consent label” has change from **red** to **green** to identify there is a consent in this clients’ file.

8. This is also reflected on the “Service Summary” module in Figure 275. Refer to page 81 for how to access the “Service Summary”.

Figure 275 - Newly Added Consent Visible in Service Summary Module

Modifying an Existing Consent

1. To modify an existing consent, refer to page 130 for how to access the Consent Summary module.
2. From the review list, select the desired consent.

Admission	Type	Initiated	Expired	Revoked	Consent To	File Name
2	Verbal	18-May-2016	18-May-2017		Dr. Jones	

Figure 276 - Modifying an Existing Consent

3. Modify the necessary data, and when satisfied with the changes, click **Save** to finalize the process.
4. In Figure 277 below, the user removed the expiration date.

Figure 277 - Saving a Modified Consent

Attaching Scanned Consent Document

If desired, users can also digitally attach the signed and scanned consent form.



Contact your IT department regarding how to scan a document. Once the scan is available for your use, continue with these steps.

1. Access the Consent Summary module as described on page 130.
2. Locate and click on the desired consent which the scanned document will be added.
3. Click on the **paperclip icon** as identified in Figure 278.

Admission	Type	Initiated	Expired	Revoked	Consent To	File Name
2	Verbal	18-May-2016	18-May-2017		Dr. Jones	

Figure 278 - Attaching Scanned Consent Document

4. An Attachment Window will then appear on screen as shown in Figure 279.

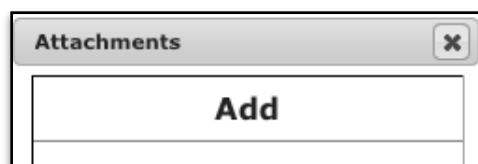


Figure 279 - Adding Attachment to Consent

5. Click **Add** to continue the process.

- A window will appear as demonstrated in Figure 280 to allow the user to locate their desired attachment.

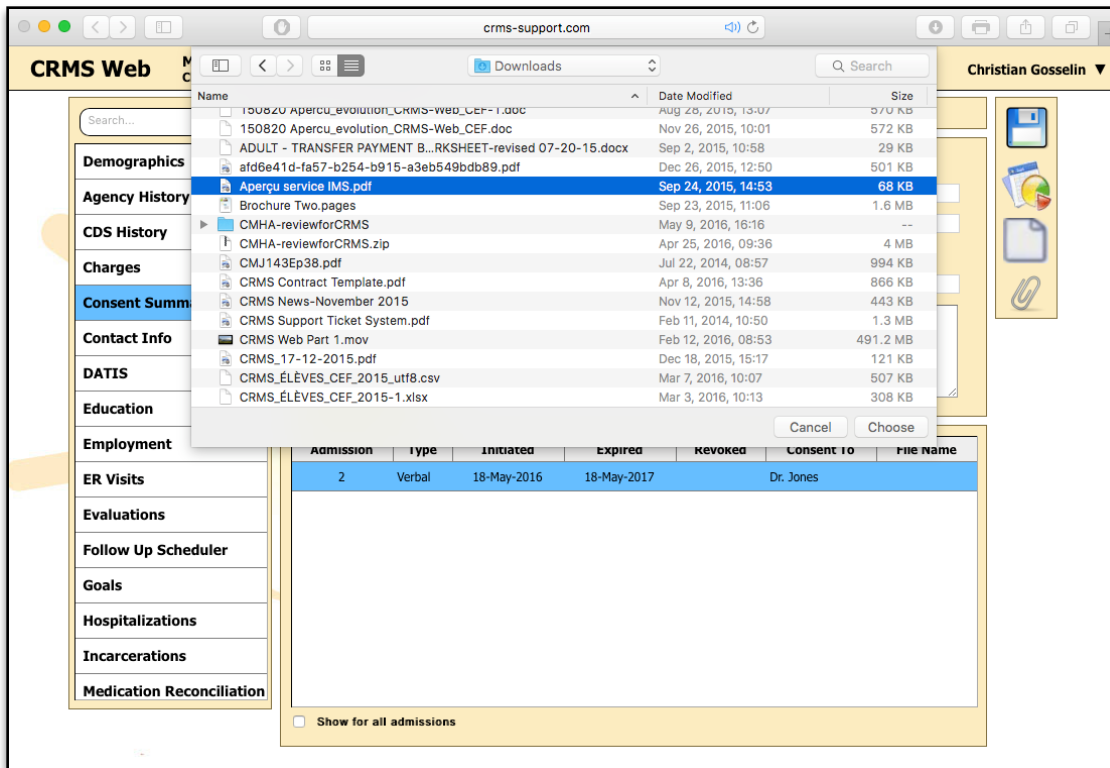


Figure 280- Navigating to Locate Scanned Attachment

- Once the user has located the desired file, click **Choose** to finalize the process.
- A message box will appear confirming that the process was successful.

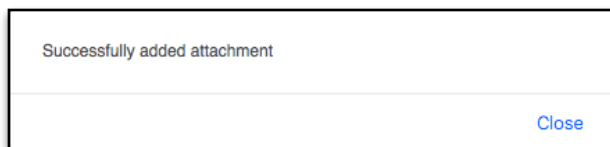


Figure 281 - Successfully Added Scanned Consent

- The Review section of the Consent Summary module will refresh to then display the file name as shown below in Figure 282.

Admission	Type	Initiated	Expired	Revoked	Consent To	File Name
2	Verbal	18-May-2016	18-May-2017		Dr. Jones	Aperçu service IMS.pdf

Figure 282 - Reviewing Newly Added Scanned Attachment

Reviewing a Scanned Attachment

1. Once the scanned attachment has been added to the Consent Summary, users can follow these steps in order to review.
2. Access the Consent Summary module as described on page 130.
3. From the Review Section, locate the particular consent.
4. Click on the paperclip icon to bring up the Attachments window.
5. Click on **View** as shown in Figure 283.

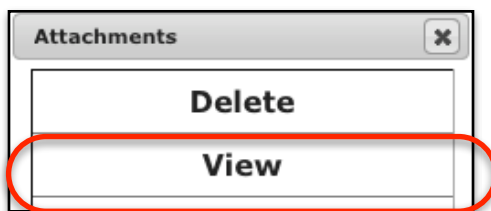


Figure 283 - Reviewing a Scanned Attachment

6. The scanned attachment will then be automatically downloaded and opened in a new tab within the web browser.

Deleting a Scanned Attachment

1. Once the scanned attachment has been added to the Consent Summary, users can follow these steps in order to delete an attachment.
2. Access the Consent Summary module as described on page 130.
3. From the Review Section, locate the particular consent.
4. Click on the paperclip icon to bring up the Attachments window.
5. Click on **Delete** as shown in Figure 284.

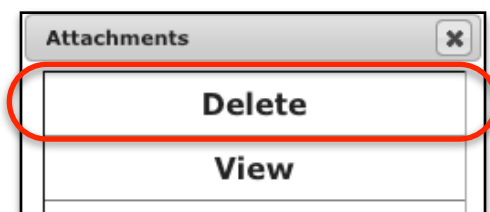


Figure 284 - Deleting a Scanned Attachment

6. A message will appear confirming the process was successful.

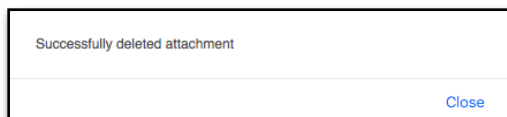
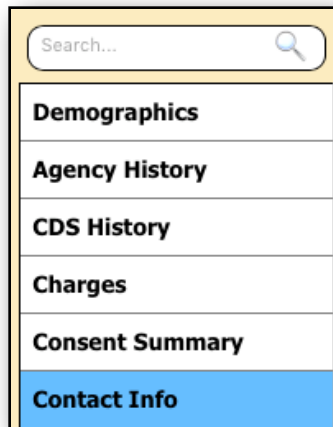


Figure 285 - Successfully Deleted Attachment

Contact Info Module

The Contact Info module allows users to document all phone numbers, fax numbers, etc., of a clients' particular contacts such as emergency contact, doctor, therapist, etc.

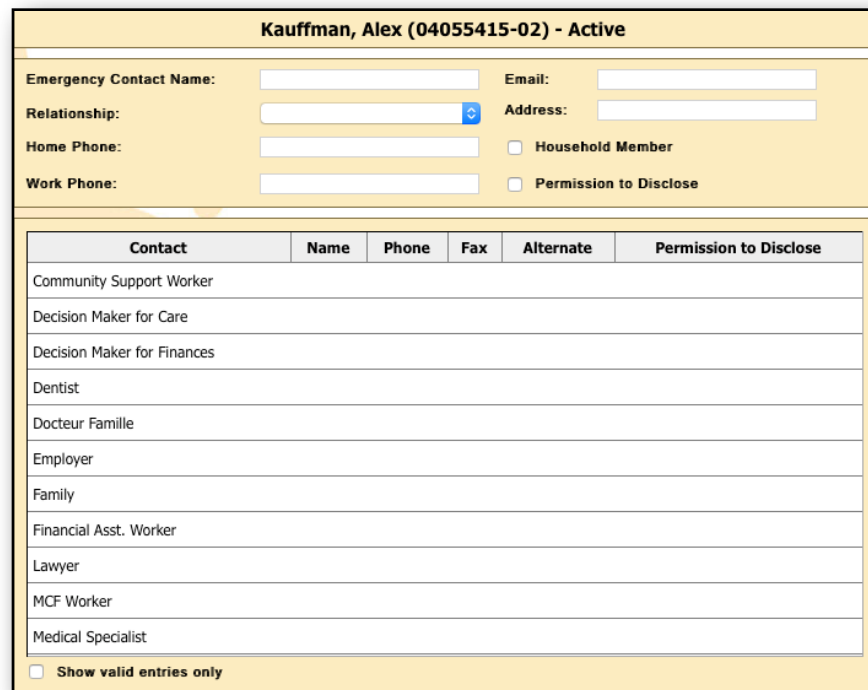
1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client and open their chart as described on page 50.
3. From the list of modules, select **Contact Info** as shown below in Figure 286.



A vertical menu with a search bar at the top. Below the search bar are six menu items: Demographics, Agency History, CDS History, Charges, Consent Summary, and Contact Info. The 'Contact Info' item is highlighted with a blue background.

Figure 286 - Accessing Contact Info Module

4. The Contact Info module will then appear on screen.



The screenshot shows the 'Contact Info' module for a client named 'Kauffman, Alex (04055415-02) - Active'. The form includes fields for Emergency Contact Name, Relationship, Home Phone, Work Phone, Email, and Address. There are also checkboxes for 'Household Member' and 'Permission to Disclose'. Below these fields is a table with columns: Contact, Name, Phone, Fax, Alternate, and Permission to Disclose. The table lists various contact roles such as Community Support Worker, Decision Maker for Care, Decision Maker for Finances, Dentist, Docteur Famille, Employer, Family, Financial Asst. Worker, Lawyer, MCF Worker, and Medical Specialist. At the bottom, there is a checkbox labeled 'Show valid entries only'.

Contact	Name	Phone	Fax	Alternate	Permission to Disclose
Community Support Worker					
Decision Maker for Care					
Decision Maker for Finances					
Dentist					
Docteur Famille					
Employer					
Family					
Financial Asst. Worker					
Lawyer					
MCF Worker					
Medical Specialist					

Figure 287 - Contact Info Module



TIPS AND TRICKS - The 'list' appearing in the **Contact Info** module is *dynamic*, meaning it can be adjusted or modified as necessary by the **CRMS Administrator**.

5. To modify a contact info record, select the desired item from the list. In this example, a user is modify the 'dentist' entry.
6. Upon clicking on the desired contact info item, the **Contact Details** module will then appear on screen.

Figure 288 - Contact Details Window

Figure 288 - Contact Details Window

7. Input the desired information in the available fields and click **Save** when satisfied to finalize the process.
8. Figure 289 illustrates the Contact Details window prior to saving.

Figure 290 - Contact Details Window Prior to Saving

Figure 290 - Contact Details Window Prior to Saving

9. Upon clicking save, the window will automatically close, and a message box will appear confirming the save was indeed successful.

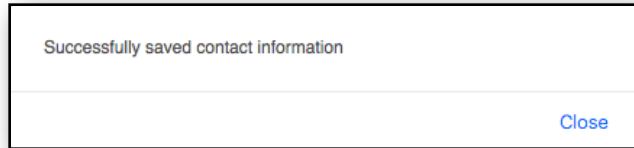


Figure 291 - Successfully Saved Contact Information

10. The Contact Info module will also automatically refresh to display the newly inputted data. This can be seen in Figure 292 below.

Contact	Name	Phone	Fax	Alternate	Permission to Disclose
Community Support Worker					
Decision Maker for Care					
Decision Maker for Finances					
Dentist	Dr. McDonnell	613 458 9632	613 452 3265		Yes
Docteur Famille					
Employer					
Family					
Financial Asst. Worker					
Lawyer					
MCF Worker					
Medical Specialist					

☐ Show valid entries only

Figure 292 - Successfully Updated Contact Info Item

Show Valid Entries Only

11. Users can clean up the Contact Info list by clicking on **Show valid entries only** as shown below. It will only display the rows for which data has been added.

Contact	Name	Phone	Fax	Alternate	Permission to Disclose
Dentist	Dr. McDonnell	613 458 9632	613 452 3265		Yes

☒ Show valid entries only

Figure 293- Showing Valid Entries Only

Updating Emergency Contact Info

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client and open their chart as described on page 50. From the list of modules, select **Contact Info** as shown on page 136.
3. Input the necessary data as shown below in Figure 294.

Emergency Contact Name:	Julie Kauffman	Email:	
Relationship:	Wife	Address:	123 Fake St., Kingston ON
Home Phone:	613 562 3162	☒ Household Member	
Work Phone:	613 856 9530	☒ Permission to Disclose	

Figure 294 - Updating Emergency Contact Info

4. When satisfied with the changes, click **Save**.



Figure 295 - Saving Emergency Contact Info

5. A message box will appear confirming the save was indeed successful.

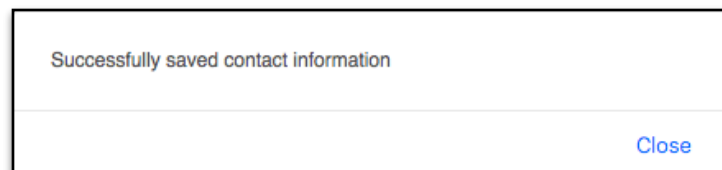


Figure 296- Successfully Updated Contact Info

Education Module

The Education module allows users to document more detailed education information that what is collected by the CDS data points.

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **Education** module as shown in Figure 297.

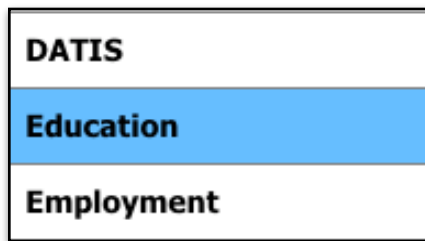
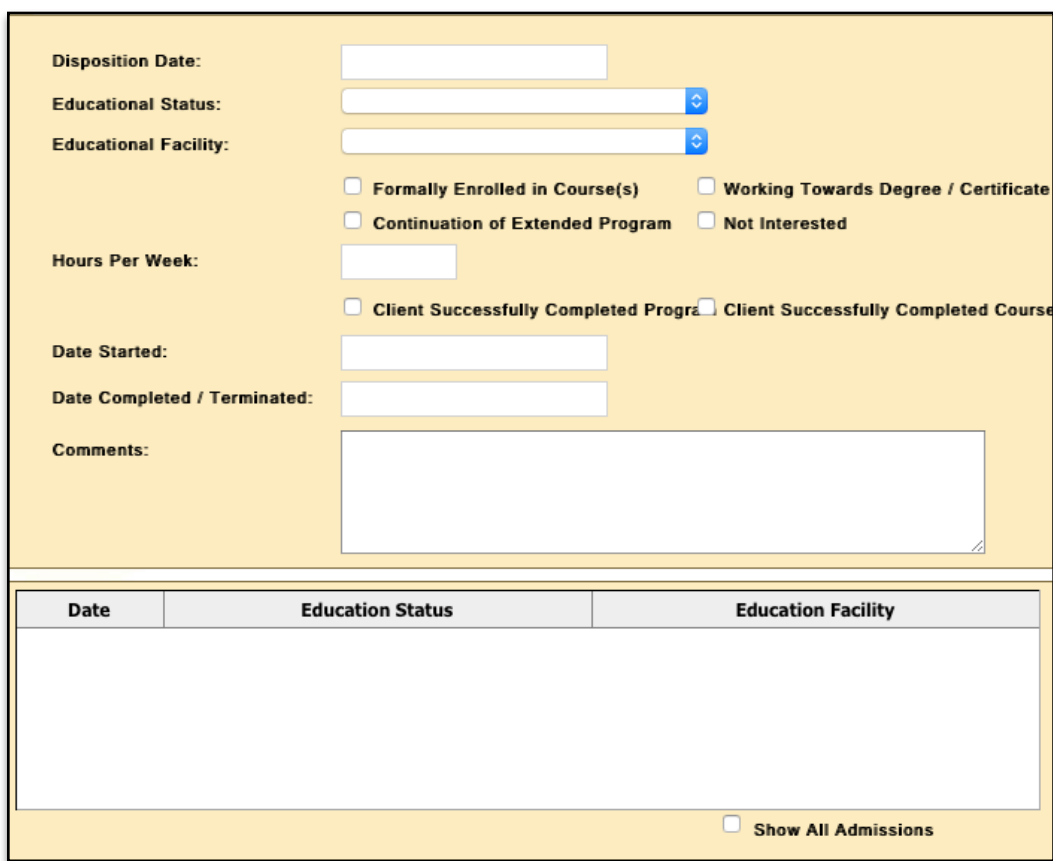


Figure 297 - Accessing Education Module

4. The Education Module will then appear on screen as demonstrated below.



Date	Education Status	Education Facility

☐ Show All Admissions

Figure 298 - Education Module

5. Fill out the necessary fields. When satisfied, click **Save**. Figure 299 below demonstrates the Education module prior to saving.

The form contains the following fields and options:

- Disposition Date:** May 18, 2016
- Educational Status:** College Graduate
- Educational Facility:** St. Lawrence College
- ☐ Formally Enrolled in Course(s)
- ☐ Working Towards Degree / Certificate
- ☐ Continuation of Extended Program
- ☐ Not Interested
- Hours Per Week:** (empty field)
- ☒ Client Successfully Completed Program
- ☒ Client Successfully Completed Course
- Date Started:** Sep 01, 2002
- Date Completed / Terminated:** Apr 27, 2005
- Comments:** (empty text area)

Figure 299 - Inputting Education Data

6. Upon saving, a message box will appear confirming the save was successful.

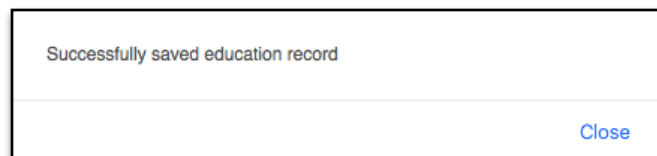


Figure 300 - Successfully Saved Education Record

7. The Education module will then automatically refresh and display the newly saved data.

Date	Education Status	Education Facility
2016-05-18	College Graduate	St. Lawrence College

Figure 301 - Reviewing Saved Education Data

Modifying Saved Education Data

1. Refer to page 140 on how to access the Education module.
2. Locate the desired record from the review section which will be modified.
3. **Click** on it to select it.

Date	Education Status	Education Facility
2016-05-18	College Graduate	St. Lawrence College

Figure 302 - Modifying Saved Education Data

4. The data will then be loaded on screen.
5. Make any adjustments as necessary and when satisfied, click **Save** to finalize the process.

Show for All Admissions

When accessing a client file whom has multiple referrals (.01, .02, .03, etc.), users can use the “Show for All Versions” checkmark to easily review across all referrals without the need to open each individual file.

1. Refer to page 140 on how to access the Education module.
2. At the bottom of the module, locate and check the **Show for All Admissions** check mark as illustrated on Figure 303.

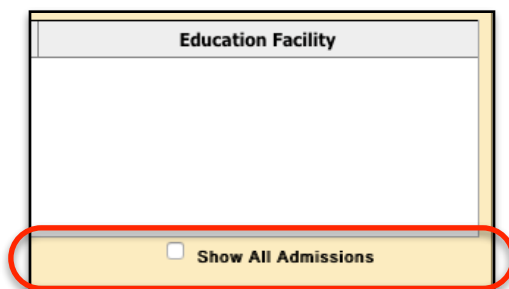


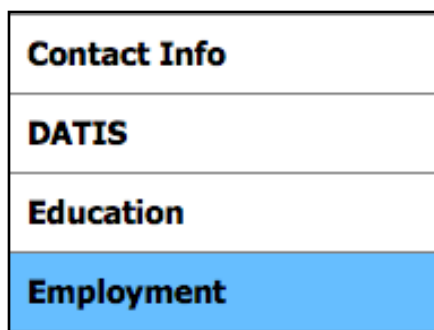
Figure 303 - Show All Admissions Checkmark

3. The Education module will then automatically refresh to display Education data across all of the clients' referrals.

Employment Module

The Employment module allows users to document additional employment information above and beyond what is already recorded in the CDS data points.

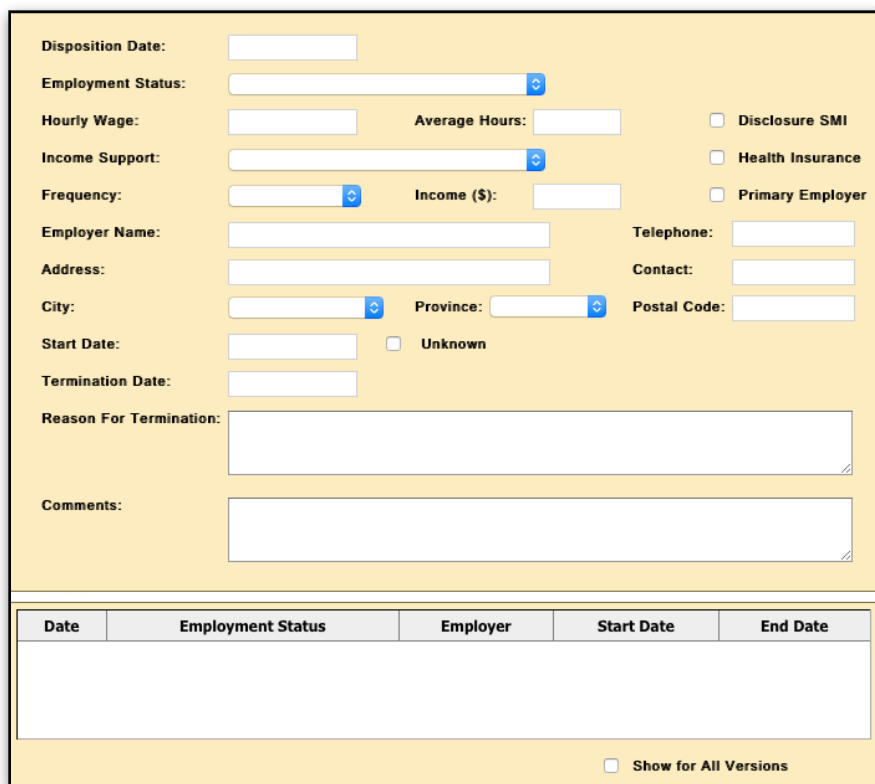
1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **Employment** module as shown in Figure 304.



Contact Info
DATIS
Education
Employment

Figure 304 - Employment Module

4. The Employment module will then appear on screen as demonstrated below.



Disposition Date:					
Employment Status:					
Hourly Wage:		Average Hours:		☐	Disclosure SMI
Income Support:		☐	Health Insurance		
Frequency:		Income (\$):		☐	Primary Employer
Employer Name:		Telephone:			
Address:		Contact:			
City:		Province:		Postal Code:	
Start Date:		☐	Unknown		
Termination Date:					
Reason For Termination:					
Comments:					

Date	Employment Status	Employer	Start Date	End Date

☐ Show for All Versions

Figure 305 - Employment Module

- Fill out the necessary fields and when satisfied, click **Save** to complete the process. Figure 306 illustrates the Employment module prior to saving.

Disposition Date: May 19, 2016

Employment Status: Employed / Self Employed - Full Time

Hourly Wage: 17.50 **Average Hours:** 37 ☐ **Disclosure SMI**

Income Support: ☐ **Health Insurance**

Frequency: Weekly **Income (\$):** 625 ☐ **Primary Employer**

Employer Name: CTSI Incorporated **Telephone:** 613 455 6529

Address: 721 Progress Ave. **Contact:** Naomi Hurtubise

City: Kingston **Province:** Ontario **Postal Code:** K7M 6S4

Start Date: Feb 07, 2007 ☐ **Unknown**

Termination Date:

Reason For Termination:

Comments:

Figure 306 - Employment Module Prior to Saving

- Upon saving, a message will appear to confirm the process was indeed successful.

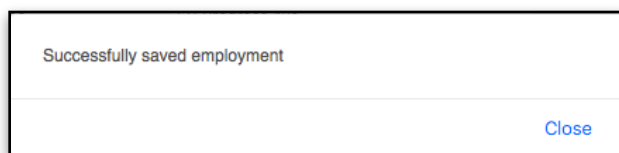


Figure 307 - Successfully Saved Employment Record

- The Employment module will then automatically refresh to display the saved data.

Date	Employment Status	Employer	Start Date	End Date
2016-05-19	Employed / Self Employed - Full Time	CTSI Incorporated	2007-02-07	

Figure 308 - Reviewing Saved Employment Data

Modifying Saved Employment Data

1. Refer to page 143 on how to access the Employment module.
2. Locate the desired record from the review section which will be modified.
3. **Click** on it to select it.

Date	Employment Status	Employer	Start Date	End Date
2016-05-19	Employed / Self Employed - Full Time	CTSI Incorporated	2007-02-07	

Figure 309 - Modifying Saved Employment Data

4. The data will then be loaded on screen.
5. Make any adjustments as necessary and when satisfied, click **Save** to finalize the process.

Show for All Versions

When accessing a client file whom has multiple referrals (.01, .02, .03, etc.), users can use the “Show for All Versions” checkmark to easily review across all referrals without the need to open each individual file.

1. Refer to page 143 on how to access the Employment module.
2. At the bottom of the module, locate and check the **Show for All Versions** checkmark as illustrated on Figure 310.

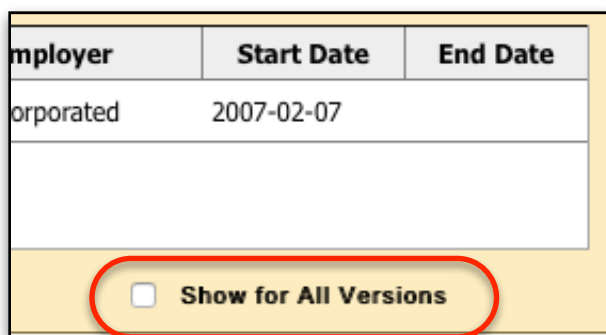
A screenshot of a software interface showing a table with columns 'Employer', 'Start Date', and 'End Date'. The first row contains 'CTSI Incorporated' and '2007-02-07'. Below the table, there is a yellow bar containing a checkbox and the text 'Show for All Versions'. The checkbox is currently unchecked and is circled in red.

Figure 310 - Show for All Versions Checkmark

3. The Employment module will then automatically refresh to display Employment data across all of the clients' referrals.

ER Visits Module

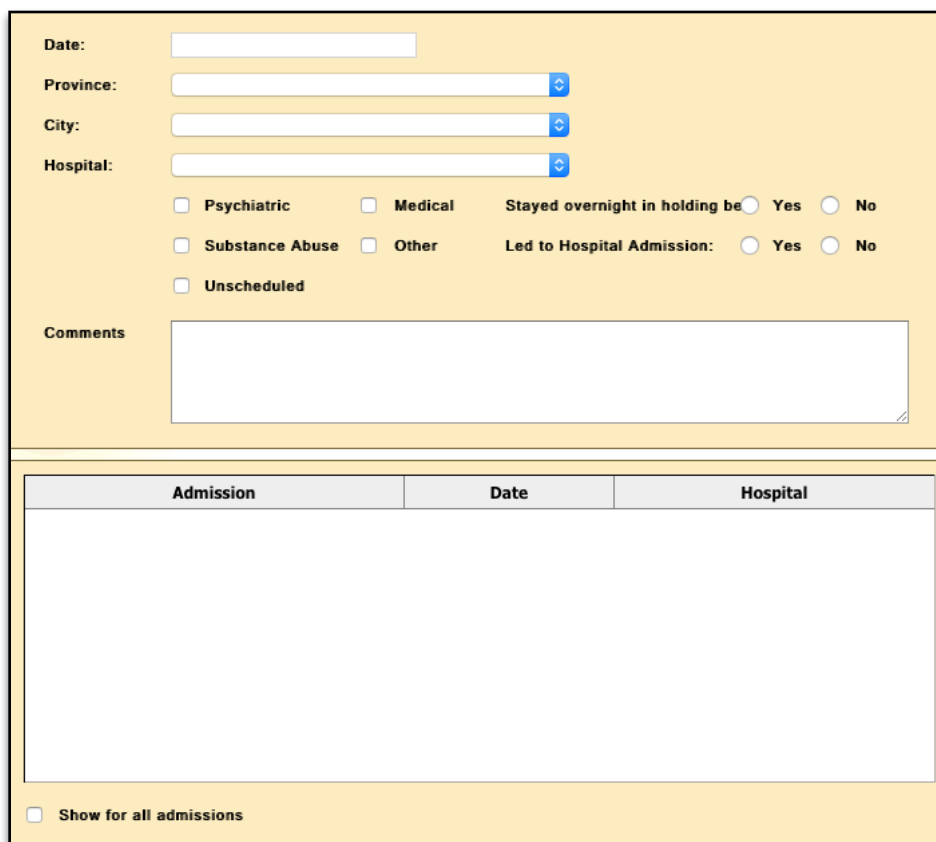
The ER Visits module allows users to document any emergency room visits a client might of had in their medical history.

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **ER Visits** module as shown in Figure 311.



Figure 311 - ER Visits Module

4. The ER Visits module will then appear on screen as illustrated below in Figure 312.



Admission	Date	Hospital
-----------	------	----------

Figure 312 - ER Visits Module

- Fill out the necessary fields and when satisfied click **Save** to finalize the process.
- Figure 313 demonstrates the ER Visit Module prior to saving.

Date: May 19, 2016

Province: Ontario

City: Kingston

Hospital: Kingston General Hospital

☐ Psychiatric
 ☒ Medical
 Stayed overnight in holding bed: ☒ Yes ☐ No

☒ Substance Abuse
 ☐ Other
 Led to Hospital Admission: ☒ Yes ☐ No

☐ Unscheduled

Comments

Figure 313 - ER Visits Module Prior to Saving

- Upon saving, a message will appear confirming it was successful.

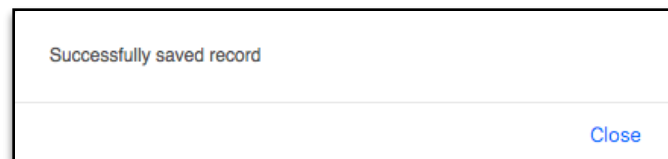


Figure 314 - Successfully Saved ER Visit

- The ER Visits module will then automatically refresh to display the newly saved data. This is reflected in Figure 315.

Admission	Date	Hospital
2	19-May-2016	Kingston General Hospital

Figure 315 - Reviewing Saved ER Visits Data

Modifying Saved ER Visits Data

1. Refer to page 146 on how to access the ER Visits module.
2. Locate the desired record from the review section which will be modified.
3. **Click** on it to select it.

Admission	Date	Hospital
2	19-May-2016	Kingston General Hospital

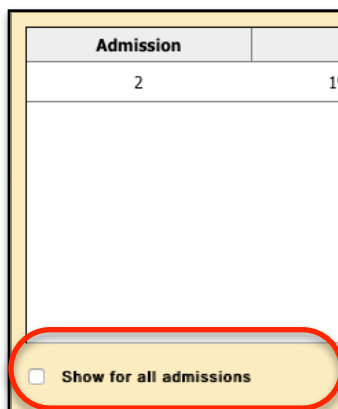
Figure 316 - Modifying Saved ER Visits Data

4. The data will then be loaded on screen.
5. Make any adjustments as necessary and when satisfied, click **Save** to finalize the process.

Show for All Admissions

When accessing a client file whom has multiple referrals (.01, .02, .03, etc.), users can use the “Show for All Versions” checkmark to easily review across all referrals without the need to open each individual file.

1. Refer to page 146 on how to access the ER Visits module.
2. At the bottom of the module, locate and check the **Show for All Versions** check mark as illustrated on Figure 317.



Admission	Date	Hospital
2	19-May-2016	Kingston General Hospital

☐ Show for all admissions

Figure 317 - Show for All Admissions Checkmark

3. The ER Visits module will then automatically refresh to display ER Visits data across all of the clients' referrals.

Hospitalizations Module

The Hospitalizations module allows users to document any hospitalizations which may of occurred in the clients' medical history.

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **Hospitalizations** module as shown in Figure 318.

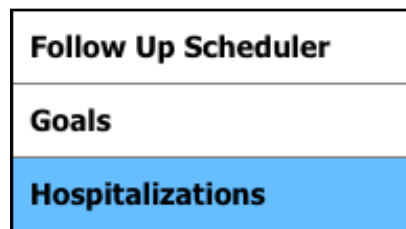


Figure 318 - Hospitalizations Module

4. The Hospitalizations module will then appear on screen as illustrated in Figure 319.

The form is divided into two main sections. The top section is a light yellow box containing input fields for 'Disposition Date', 'Status' (with a dropdown arrow), 'Institution' (with a dropdown arrow), 'Date Hospitalized', and 'Date Discharged'. Below these are several checkboxes: 'Mental Illness Related', 'Approximate' (under both dates), 'Voluntary', 'Involuntary', 'Substance abuse related', 'Forensic Related', 'Respite', and 'Medical Related'. There is also a 'Shared Crisis Emerg. Time' dropdown and a 'Comments' text area. The bottom section is a table with a light yellow background. The table has five columns: 'Admission', 'Hospitalized', 'Discharged', 'Status', and 'Institution'. The table is currently empty. At the bottom left of the form, there is a checkbox labeled 'Show for all admissions'.

Figure 319 - Hospitalizations Module

5. Fill out the necessary fields and when satisfied, click **Save** to finalize the process.
6. Figure 320 demonstrates the Hospitalizations Module prior to saving.

Disposition Date: May 19, 2016

Status: Admitted to Medical Hospital ☐ **Mental Illness Related**

Institution: Kingston General Hospital

Date Hospitalized: May 19, 2016 **Date Discharged:**

☒ **Approximate** ☐ **Approximate**

☐ **Voluntary** ☒ **Involuntary** ☐ **Substance abuse related**

☐ **Forensic Related** ☐ **Respite** ☒ **Medical Related**

Shared Crisis Emerg. Time:

Comments:

Figure 320 - Hospitalization Module Prior to Saving

7. Upon saving, a message will appear to confirm the process was indeed successful.

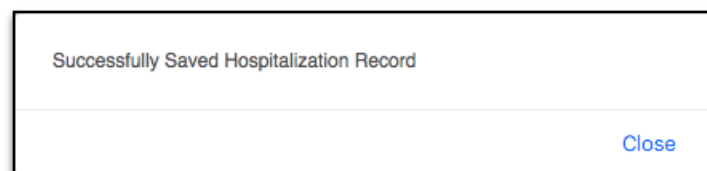


Figure 321 - Successfully Saved Hospitalization Record

8. The Hospitalizations module will then automatically refresh to display the newly saved data.

Admission	Hospitalized	Discharged	Status	Institution
2	19-May-2016		Admitted to Medical Hospital	Kingston General Hospital

Figure 322 - Reviewing Saved Hospitalization Data

Modifying Saved Hospitalization Data

1. Refer to page 149 on how to access the Hospitalizations module.
2. Locate the desired record from the review section which will be modified.
3. **Click** on it to select it.

Admission	Hospitalized	Discharged	Status	Institution
2	19-May-2016		Admitted to Medical Hospital	Kingston General Hospital

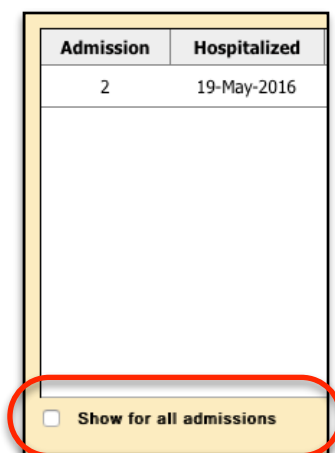
Figure 323 - Modifying Saved Hospitalization Data

4. The data will then be loaded on screen.
5. Make any adjustments as necessary and when satisfied, click **Save** to finalize the process.

Show for All Admissions

When accessing a client file whom has multiple referrals (.01, .02, .03, etc.), users can use the “Show for All Versions” checkmark to easily review across all referrals without the need to open each individual file.

1. Refer to page 149 on how to access the Hospitalizations module.
2. At the bottom of the module, locate and check the **Show for All Versions** check mark as illustrated on Figure 324.



Admission	Hospitalized
2	19-May-2016

☐ Show for all admissions

Figure 324 - Show for All Admissions Checkmark

3. The Hospitalizations module will then automatically refresh to display Hospitalizations data across all of the clients' referrals.

Incarcerations Module

The Incarcerations module allows users to document incarceration details above and beyond what is captured by the CDS data collection.

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **Incarcerations** module as shown in Figure 325.



Figure 325 - Incarcerations Module

4. The Incarcerations module will then appear on screen as demonstrated below in Figure 326.

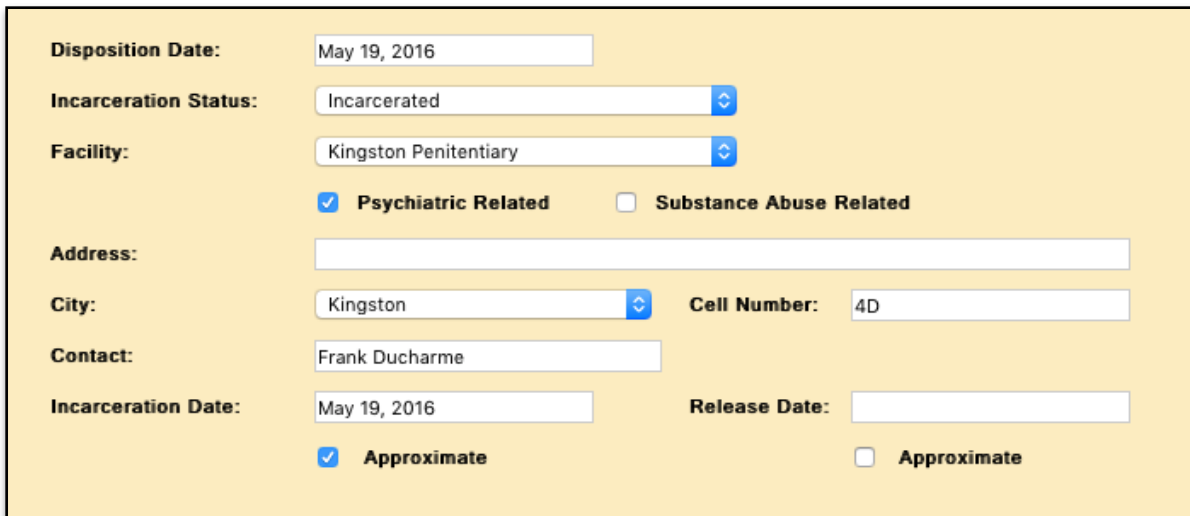
Disposition Date:	
Incarceration Status:	
Facility:	
☐ Psychiatric Related ☐ Substance Abuse Related	
Address:	
City:	
Contact:	
Incarceration Date:	
☐ Approximate	
Release Date:	
☐ Approximate	

Admission	Disposition Date	Status	Incarceration Date	Release Date
-----------	------------------	--------	--------------------	--------------

☐ Show for all admissions

Figure 326 - Incarcerations Module

5. Fill out the necessary fields and when satisfied, click **Save** to finalize the process.
6. Figure 327 demonstrates the Incarcerations module prior to saving.



Disposition Date: May 19, 2016

Incarceration Status: Incarcerated

Facility: Kingston Penitentiary

☒ **Psychiatric Related** ☐ **Substance Abuse Related**

Address:

City: Kingston **Cell Number:** 4D

Contact: Frank Ducharme

Incarceration Date: May 19, 2016 **Release Date:**

☒ **Approximate** ☐ **Approximate**

Figure 327 - Incarcerations Module Prior to Saving

7. Upon saving, a message will appear confirming the process was indeed successful.



Figure 328 - Successfully Saved Incarcerations Record

8. The Incarcerations module will then automatically refresh to display the newly saved data.

Admission	Disposition Date	Status	Incarceration Date	Release Date
2	19-May-2016	Incarcerated	19-May-2016	

Figure 329 - Reviewing Saved Incarcerations Data

Modifying Saved Incarcerations Data

1. Refer to page 152 on how to access the Incarcerations module.
2. Locate the desired record from the review section which will be modified.
3. **Click** on it to select it.

Admission	Disposition Date	Status	Incarceration Date	Release Date
2	19-May-2016	Incarcerated	19-May-2016	

Figure 330 - Modifying Saved Incarcerations Data

4. The data will then be loaded on screen.
5. Make any adjustments as necessary and when satisfied, click **Save** to finalize the process.

Show for All Admissions

When accessing a client file whom has multiple referrals (.01, .02, .03, etc.), users can use the “Show for All Versions” checkmark to easily review across all referrals without the need to open each individual file.

1. Refer to page 152 on how to access the Incarcerations module.
2. At the bottom of the module, locate and check the **Show for All Versions** check mark as illustrated on Figure 331.

Admission	Disposition Date
2	19-May-

☐ Show for all admissions

Figure 331 - Show for All Admissions Checkmark

3. The Incarcerations module will then automatically refresh to display Incarcerations data across all of the clients' referrals.

Medications Module

The Medications module allows users to input any medications the client might be currently taking. Users can also utilize a 'DIN List' to quickly and efficiently add medications to a clients' file.

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **Medications** module as shown in Figure 332.

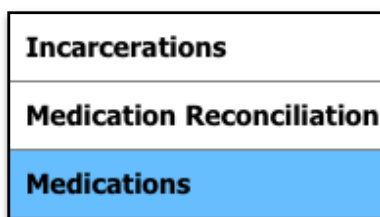


Figure 332 - Medications Module

4. The Medications module will then appear on screen as illustrated in Figure 333.

A screenshot of the Medications module form. It features two tabs at the top: 'Medication Details' (active) and 'Medication Reconciliation'. The form includes several input fields: 'Created:', 'Last Updated:', 'Expires:', 'Prescription Start Date:', 'Stop Date:', 'Medication & Dosage:', 'Frequency:', 'Notes:', 'Pharmacy:' (with a dropdown arrow), 'Critical' (checkbox), 'Governed by Medical Administration Board:' (radio buttons for 'Yes' and 'No'), and 'Reason Unprescribed:'. Below these fields is a 'Medication Allergies:' section with a text area. At the bottom, there is a table with two columns: 'Date' and 'Medication & Dosage'. A 'Show All' checkbox is located at the bottom right of the form.

Figure 333 - Medications Module

5. Fill out the necessary fields, when satisfied click **Save** to finalize the process.

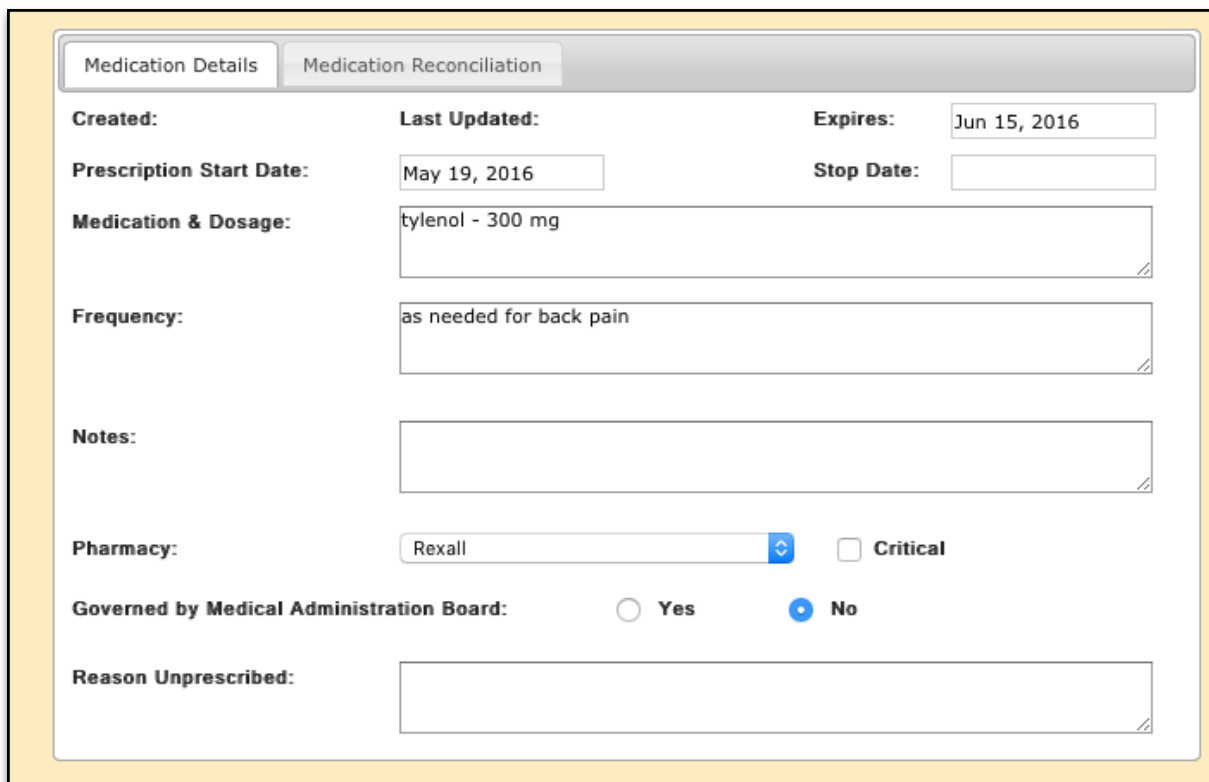


Figure 334 - Medications Module Prior to Saving

6. Upon saving, a message will appear confirming the medication was successfully saved.

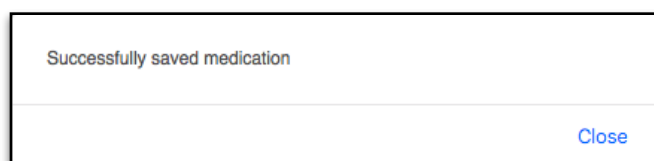


Figure 335 - Successfully Saved Medication

7. The Medications module will then automatically refresh to display the newly saved medication data.

Date	Medication & Dosage
2016-05-19	tylenol - 300 mg

Figure 336 - Reviewing Saved Medication Data

Modifying Saved Medications Data

1. Refer to page 155 on how to access the Medications module.
2. Locate the desired record from the review section which will be modified, click on it to select it.

Date	Medication & Dosage
2016-05-19	tylenol - 300 mg

Figure 337 - Modifying Saved Medication Data

3. The data will then be loaded on screen.
4. Make any adjustments as necessary and when satisfied, click **Save** to finalize the process.

Show All Medications

Should a user 'stop' a medication, it will vanish from the list of 'active' medications. It can also be brought back if necessary by using the **Show All** feature.

1. Refer to page 155 on how to access the Medications module.
2. At the bottom of the module, locate and check the **Show All** check mark as illustrated on Figure 338.

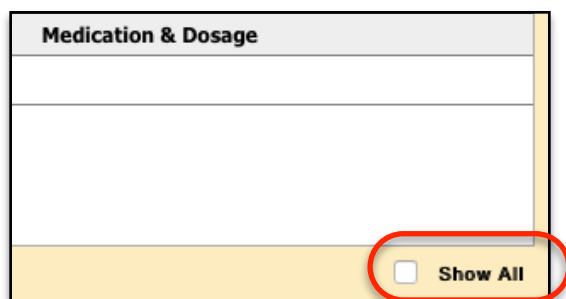


Figure 338 - Show All Medications Checkmark

3. The Medications module will then automatically refresh to display medication data across all of the clients' referrals.
4. 'Not Active' medications will appear in a yellow highlighted color.

Date	Medication & Dosage
2016-05-19	tylenol - 300 mg

Figure 339 - Reviewing 'Inactive' Medication

Using DIN List

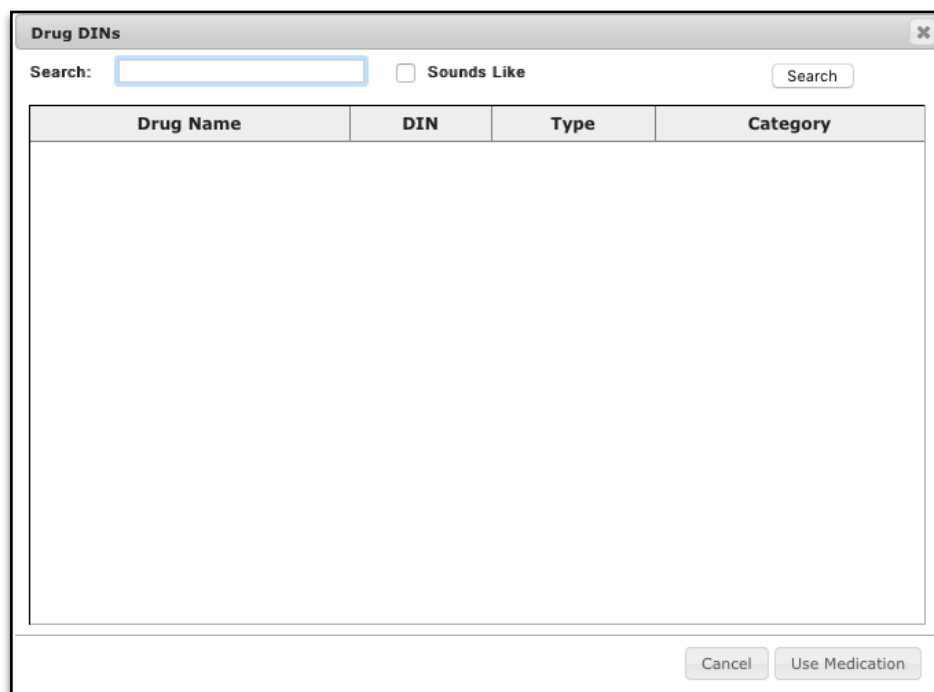
In order to efficiently and quickly input a medication into the clients' file, users can utilize the DIN List module.

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **Medications** module.
4. Click on the **DIN List** icon as identified in Figure 340.



Figure 340 - Accessing DIN List Module

5. The **Drug DIN** window will then appear on screen as demonstrated in Figure 341.



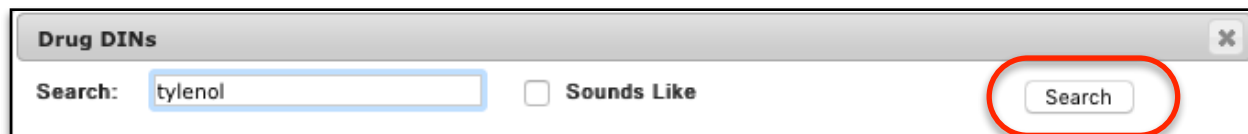
Drug DINs

Search: ☐ Sounds Like

Drug Name	DIN	Type	Category
-----------	-----	------	----------

Figure 341 - Drug DIN Search Dialog

6. In the **Search** box, users can type their desired medication name, or DIN number. Once satisfied with the search parameters, click on the **Search** button.

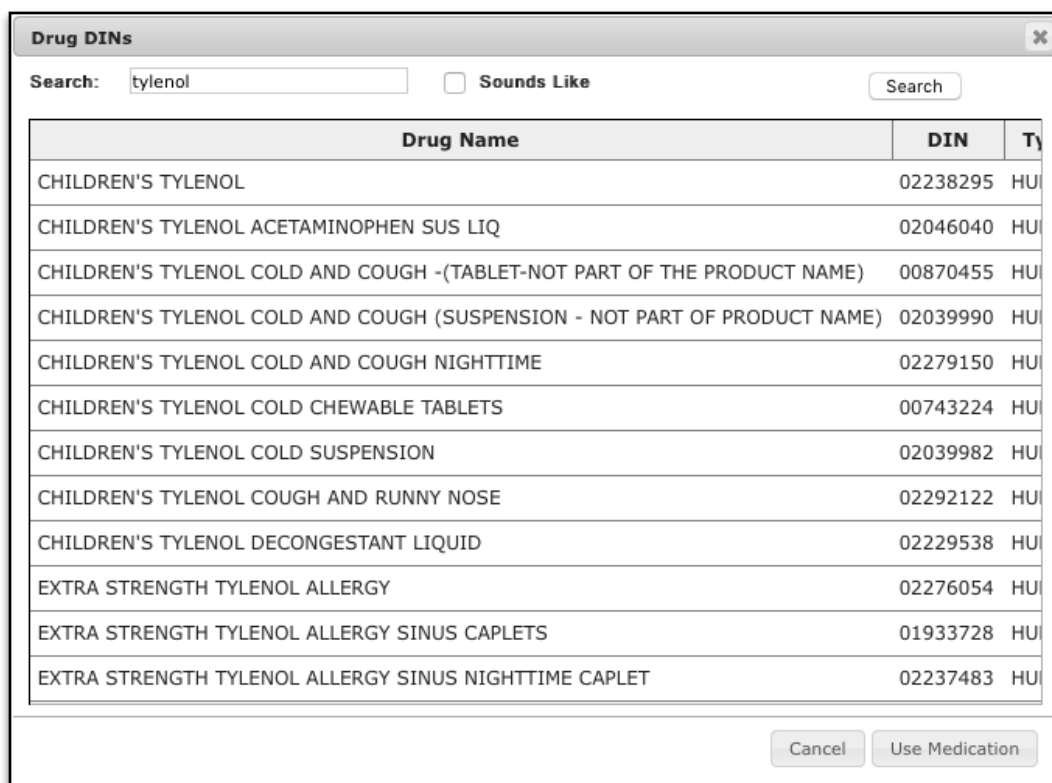


Drug DINs

Search: ☐ Sounds Like

Figure 342 - Searching for a Medication using Drug DIN's

7. The Drug DIN's interface will refresh to display the search results if any are returned. This is demonstrated in Figure 343 below.



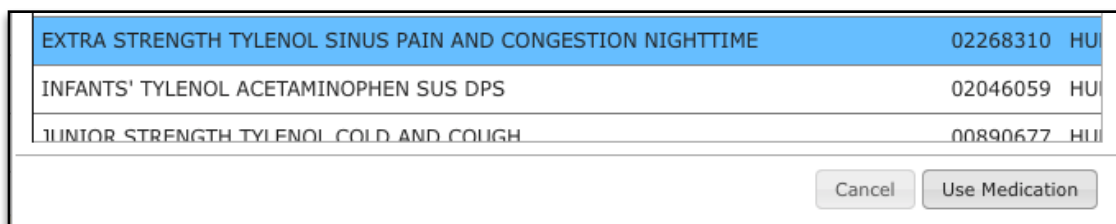
Drug DINs

Search: ☐ Sounds Like

Drug Name	DIN	TY
CHILDREN'S TYLENOL	02238295	HUI
CHILDREN'S TYLENOL ACETAMINOPHEN SUS LIQ	02046040	HUI
CHILDREN'S TYLENOL COLD AND COUGH -(TABLET-NOT PART OF THE PRODUCT NAME)	00870455	HUI
CHILDREN'S TYLENOL COLD AND COUGH (SUSPENSION - NOT PART OF PRODUCT NAME)	02039990	HUI
CHILDREN'S TYLENOL COLD AND COUGH NIGHTTIME	02279150	HUI
CHILDREN'S TYLENOL COLD CHEWABLE TABLETS	00743224	HUI
CHILDREN'S TYLENOL COLD SUSPENSION	02039982	HUI
CHILDREN'S TYLENOL COUGH AND RUNNY NOSE	02292122	HUI
CHILDREN'S TYLENOL DECONGESTANT LIQUID	02229538	HUI
EXTRA STRENGTH TYLENOL ALLERGY	02276054	HUI
EXTRA STRENGTH TYLENOL ALLERGY SINUS CAPLETS	01933728	HUI
EXTRA STRENGTH TYLENOL ALLERGY SINUS NIGHTTIME CAPLET	02237483	HUI

Figure 343- Drug DIN Search Results

8. Upon locating the desired medication, click on it to highlight it. It will appear in blue. Click **Use Medication** to finalize the process.



Drug DINs

Search: ☐ Sounds Like

EXTRA STRENGTH TYLENOL SINUS PAIN AND CONGESTION NIGHTTIME	02268310	HUI
INFANTS' TYLENOL ACETAMINOPHEN SUS DPS	02046059	HUI
JUNIOR STRENGTH TYLENOL COLD AND COUGH	00890677	HUI

Figure 344 - Located Desired Medication Using Drug DIN's

9. The Medication Name and Drug DIN Number will automatically be added to the Medication & Dosage field on the Medications module as illustrated below in Figure 345.

Medication Details Medication Reconciliation

Created: Last Updated: Expires:

Prescription Start Date: Stop Date:

Medication & Dosage: EXTRA STRENGTH TYLENOL SINUS PAIN AND CONGESTION NIGHTTIME - 02268310

Figure 345 - In Process of Adding Medication via Drug DIN's Module

10. Modify any additional fields as necessary and when satisfied with the changes, click **Save** to complete the process.
11. Figure 346 demonstrates the Medications module prior to saving.

Medication Details Medication Reconciliation

Created: Last Updated: Expires:

Prescription Start Date: May 19, 2016 Stop Date:

Medication & Dosage: EXTRA STRENGTH TYLENOL SINUS PAIN AND CONGESTION NIGHTTIME - 02268310

Frequency: once per night

Notes:

Pharmacy: Shoppers Critical

Governed by Medical Administration Board: Yes No

Reason Unprescribed:

Figure 346 - Modifying Medication Prior to Saving

12. The Medications module will then refresh to display the newly saved medication.

Date	Medication & Dosage
2016-05-19	tylenol - 300 mg
2016-05-19	EXTRA STRENGTH TYLENOL SINUS PAIN AND CONGESTION NIGHTTIME - 02268310

Figure 347 - Reviewing Newly Added Medication

Other Illness Module

The Other Illness modules allows users to document additional illness information which might not be captured in any other modules.

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **Other Illness** module as shown in Figure 348.

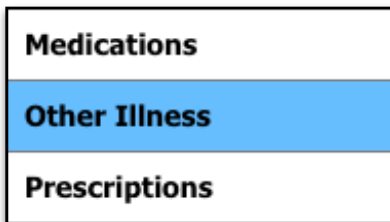


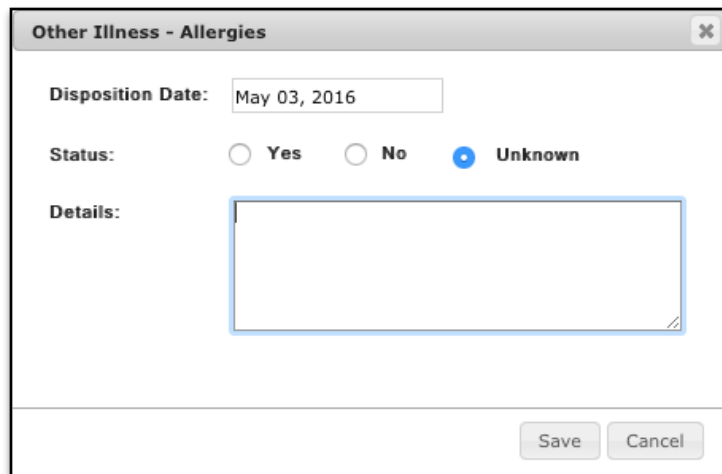
Figure 348 - Other Illness Module

4. The Other Illness module will then appear on screen as illustrated in Figure 349.

The main screen of the Other Illness module. It features five colored sections: 'Concurrent Disorder' (green), 'Dual Diagnosis' (green), 'Other chronic illnesses' (green), 'Allergies' (blue), and 'Cognitive Issues' (white). Each section contains a 'Disposition Date' of 2016-05-03 and a 'Details' link. Below these sections is a table with columns 'Admission', 'Date', 'Name', and 'Status'. At the bottom, there is a checkbox labeled 'Show for all admissions'.

Figure 349 - Other Illness Module

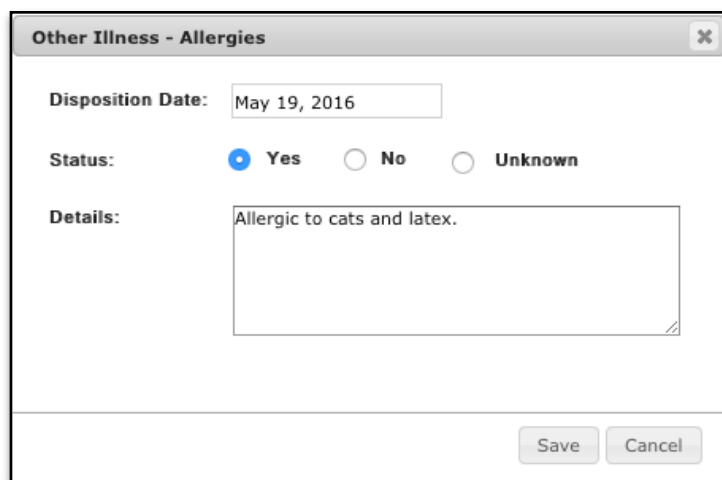
- Click on the desired row in order to bring up the editing dialog. A user has clicked on “Allergies” in Figure 350.



The dialog box is titled "Other Illness - Allergies". It contains a "Disposition Date" field with the value "May 03, 2016". Below this is a "Status" section with three radio buttons: "Yes", "No", and "Unknown". The "Unknown" radio button is selected. There is a "Details" text area which is currently empty. At the bottom right are "Save" and "Cancel" buttons.

Figure 350 - Other Illness Editing Dialog

- Modify the details as necessary and once satisfied, click on **Save** to finalize the process.
- Figure 351 below illustrates the Other Illness Dialog prior to saving.



The dialog box is titled "Other Illness - Allergies". It contains a "Disposition Date" field with the value "May 19, 2016". Below this is a "Status" section with three radio buttons: "Yes", "No", and "Unknown". The "Yes" radio button is selected. The "Details" text area now contains the text "Allergic to cats and latex.". At the bottom right are "Save" and "Cancel" buttons.

Figure 351 - Editing Other Illness Dialog - Allergies

- Upon saving, the Other Illness Editing Dialog will automatically close, and the Other Illness module will refresh to display the newly saved data.

Admission	Date	Name	Status
2	19-May-2016	Allergies	Yes

Figure 352 - Reviewing Saved Other Illness Data

9. Repeat the instructions above for any other items in the Other Illness module which requires updating.
10. The main Other Illness section will also refresh to display the newly modified data.
11. This is reflected in Figure 353 below.

Allergies Disposition Date: 2016-05-19 Details: Allergic to cats and latex.	Yes
--	------------

Figure 353 - Other Illness Module Refreshed

Show for All Admissions

When accessing a client file whom has multiple referrals (.01, .02, .03, etc.), users can use the “Show for All Admissions” checkmark to easily review across all referrals without the need to open each individual file.

1. Refer to page 161 on how to access the Other Illness module.
2. At the bottom of the module, locate and check the **Show for All Admissions** check mark as illustrated on Figure 354.

Admission
2

☐ Show for all admissions

Figure 354 - Show for All Admissions Checkmark

3. The Other Illness module will then automatically refresh to display Other Illness data across all of the clients' referrals.

Risk Factors Module

The Risk Factor module allows users to document any risk factors for a particular client. As well, they can activate the “red flag” or “moderate flag” from this particular module.



TIPS AND TRICKS - The list shown in the Risk Factors is dynamic, meaning CRMS Administrators can customize this list using the Category Table Editor in the Administration module.

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **Risk Factors** module as shown in Figure 355.

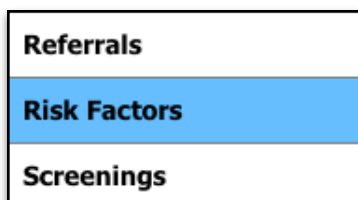


Figure 355 - Risk Factors Module

4. The Risk Factors module will then appear on screen as demonstrated in Figure 356.

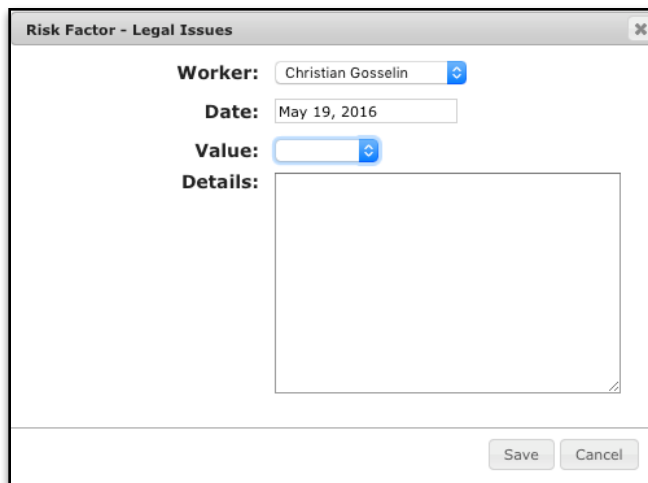
Red Flag	
Moderate Flag	
Harm to Self	?
Harm to Others	?
Inability to Care for Self	?
Financially Incapable	?
Legal Issues	?
Substance Abuse	?
Serious Medical	?
Other Risks	?

Admission	Date	Worker	Name	Value	Details

☐ Show for all Admissions

Figure 356 - Risk Factors Module

5. To modify a risk factor, click on the desired row to be modified. The Risk Factor Editing Dialog will appear as illustrated below in Figure 357.



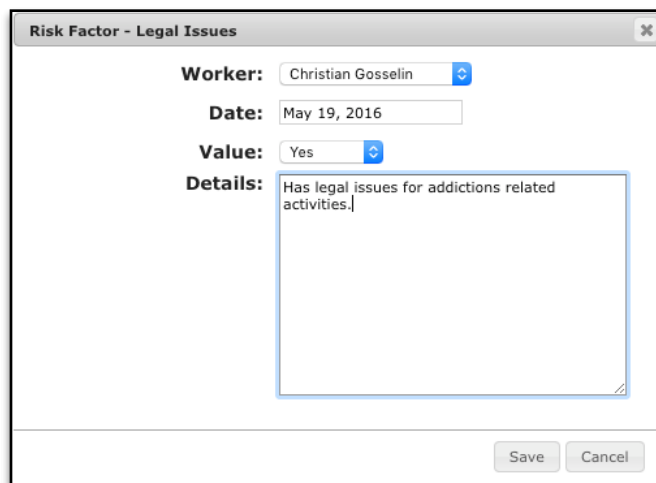
The dialog box is titled "Risk Factor - Legal Issues". It contains the following fields:

- Worker:** A dropdown menu showing "Christian Gosselin".
- Date:** A text input field showing "May 19, 2016".
- Value:** A dropdown menu that is currently empty.
- Details:** A large text area that is currently empty.

At the bottom right, there are two buttons: "Save" and "Cancel".

Figure 357 - Risk Factor Editing Dialog

6. Modify the fields as necessary. When satisfied, click **Save** to finalize the process.
7. Figure 358 demonstrates the Risk Factor Editing Dialog prior to saving.



The dialog box is titled "Risk Factor - Legal Issues". It contains the following fields:

- Worker:** A dropdown menu showing "Christian Gosselin".
- Date:** A text input field showing "May 19, 2016".
- Value:** A dropdown menu showing "Yes".
- Details:** A text area containing the text "Has legal issues for addictions related activities.".

At the bottom right, there are two buttons: "Save" and "Cancel".

Figure 358 - Risk Factor Editing Dialog Prior to Saving

8. The Risk Factor Editing Dialog will automatically close and the Risk Factors module will be refreshed.

Admission	Date	Worker	Name	Value	Details
2	19-May-2016	Christian Gosselin	Legal Issues	Yes	Has legal issues for addictions related activities...

Figure 359 - Risk Factor Module Refreshed After Saving

9. The main Risk Factors module will also automatically refresh to reflect the newly saved data.
10. This is shown in Figure 360.

Financially Incapable	?
Legal Issues	✓

Figure 360 - Main Risk Factors Module Refreshed

Show for All Admissions

When accessing a client file whom has multiple referrals (.01, .02, .03, etc.), users can use the “Show for All Admissions” checkmark to easily review across all referrals without the need to open each individual file.

1. Refer to page 164 on how to access the Risk Factors module.
2. At the bottom of the module, locate and check the **Show for All Admissions** check mark as illustrated on Figure 361.

Admission	Date
2	19-May-2016

☐ Show for all Admissions

Figure 361 - Show for All Admissions Checkmark

3. The Risk Factors module will then automatically refresh to display Risk Factors data across all of the clients' referrals.

Goals Module

The “Goals” module also known as the G.A.S. (Goal Attainment Scale) allows users to create goals for their clients and rate them as they progress through the goal with the client.



****TIPS AND TRICKS* - The Goals module can be extensively customized. CRMS Administrators can add pre-populated values via the Category Table Editor in the Administration module.***

1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client by following instructions on page 50.
3. Open the client file and navigate to the **Goals** module as shown in Figure 362.

Follow Up Scheduler
Goals
Hospitalizations

Figure 362 - Goals Module

4. The Goals Module will then appear on screen as illustrated in Figure 363.

The screenshot shows the 'Goals' module interface for a client named 'Kauffman, Alex (04055415-02) - Active'. On the left is a sidebar with a 'Back' button and a 'Show All' checkbox. The main area contains a form with fields for 'Disposition Date', 'Program', 'Goal', 'Review Date', and 'Action Plan'. There are also dropdown menus for 'Template', 'Template Type', and 'Domain'. Checkboxes for 'Active' and 'Achieved' are present. Below the form are five rating categories: 'Most Favourable (2)', 'More than Expected (1)', 'Expected (0)', 'Less than Expected (-1)', and 'Most Unfavourable (-2)', each with a text input field. On the right is a table with columns 'Date', 'Level', and 'Worker'. At the bottom right are 'New Review' and 'Edit Review' buttons.

Figure 363 - Goals Module

5. Users can manually create their own goals, by inputting their own scales in the rating boxes.
6. Alternatively, they can use the pre-populated goal templates setup by their CRMS Administrator.
7. Begin by clicking on the **Template** drop down as shown in Figure 364. Select the desired **Template** value.

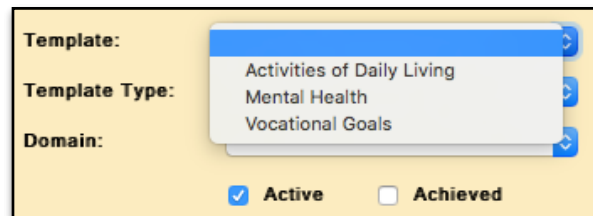


Figure 364 - Selecting from Pre-Populated Goal Template Menu

8. Upon selecting from the “Template” drop down the **Template Type** drop down will then be refreshed. From the **Template Type** drop down, select the desired value.

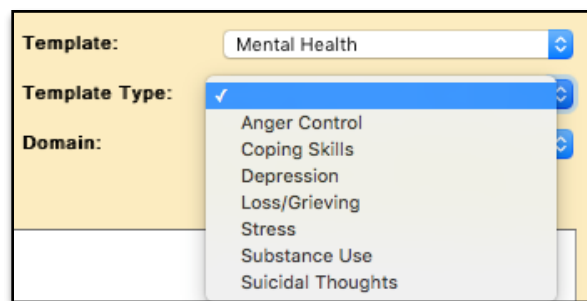


Figure 365 - Selecting from Pre-Populated Template Type Menu

9. The “Ratings” or “Outcomes” will then be automatically be populated as seen below in Figure 366.

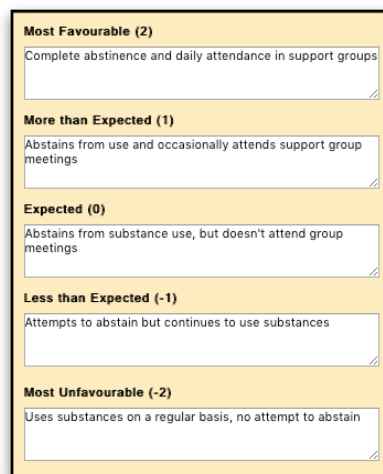


Figure 366 - Ratings Automatically Populated

10. Fill out the remainder of the necessary fields.
11. Figure 367 demonstrates the Goals module prior to saving.

Disposition Date: May 20, 2016 **Template:** Mental Health

Program: Case Management **Template Type:** Substance Use

Goal: Quit Smoking **Domain:**

Review Date: ☒ **Active** ☐ **Achieved**

Action Plan: Will assist Alex in quitting smoking by providing support and care as necessary.

Date	Level	Worker

Figure 367 - Goals Module

12. The newly created goal will also then appear on the left hand side - known as the "Goals List".

◀ **Back**

Quit Smoking

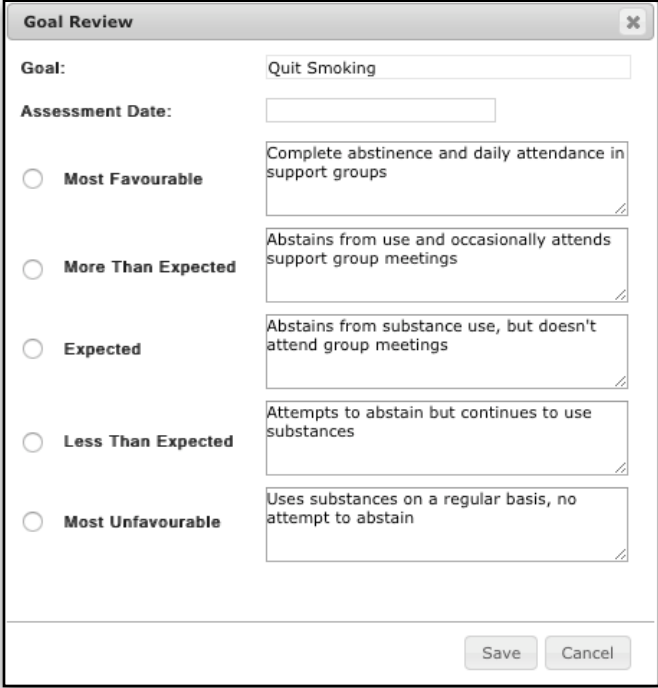
Figure 368 - Newly Created Goal Appears in the "Goals List"

13. Click to re-select the newly created goal in order to make a review. Click on **New Review** as seen below in Figure 369.



Figure 369 - Creating a New Goal Review

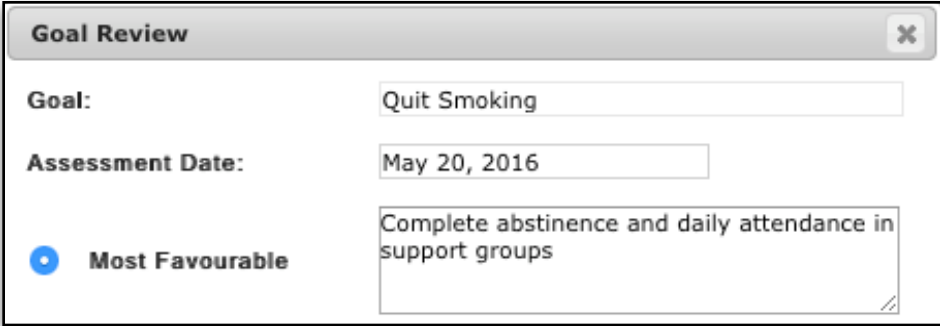
14. The Goal Review Dialog will then appear on screen as illustrated in Figure 370.

A dialog box titled "Goal Review" with a close button (X) in the top right corner. It contains the following fields and options:

- Goal:** A text field containing "Quit Smoking".
- Assessment Date:** An empty text field.
- Outcome Selection:** Five radio buttons with corresponding text boxes:
 - ☐ **Most Favourable**: "Complete abstinence and daily attendance in support groups"
 - ☐ **More Than Expected**: "Abstains from use and occasionally attends support group meetings"
 - ☐ **Expected**: "Abstains from substance use, but doesn't attend group meetings"
 - ☐ **Less Than Expected**: "Attempts to abstain but continues to use substances"
 - ☐ **Most Unfavourable**: "Uses substances on a regular basis, no attempt to abstain"
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

Figure 370 - Goal Review Dialog

15. Fill out the "Assessment" date and select the desired outcome. In Figure 371 below, a user has rated the goal review as "Most Favourable".

A dialog box titled "Goal Review" with a close button (X) in the top right corner. It contains the following fields and options:

- Goal:** A text field containing "Quit Smoking".
- Assessment Date:** A text field containing "May 20, 2016".
- Outcome Selection:** Five radio buttons with corresponding text boxes:
 - ☒ **Most Favourable**: "Complete abstinence and daily attendance in support groups"
 - ☐ **More Than Expected**: (empty text box)
 - ☐ **Expected**: (empty text box)
 - ☐ **Less Than Expected**: (empty text box)
 - ☐ **Most Unfavourable**: (empty text box)

Figure 371 - Reviewing Selected Goal

16. When satisfied with the assessment date and the goal review, click **Save** to finalize the process.



Figure 372 - Saving Goal Review

17. Upon saving the goal review, a message box will appear confirming the process was indeed successful.

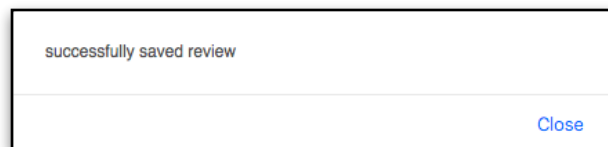


Figure 373 - Successfully Saved Goal Review

18. The newly saved goal review will then appear in the “Review List” as seen in Figure 374.

Date	Level	Worker
2016-05-20	2	Christian Gosselin

Figure 374 - Reviewing Successfully Saved Goal Review

Editing a Goal Review

1. In order to modify a previously saved goal review, first locate the desired goal by referring to page 167 above.
2. Once the desired goal has been selected, click to select the review which will be modified.

Date	Level	Worker
2016-05-20	2	Christian Gosselin

Figure 375 - Editing a Goal Review

3. When satisfied, click **Edit Review**.

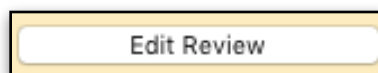


Figure 376 - Editing a Goal Review

4. The Goal Review Dialog will then appear on screen. Make the necessary changes and click **Save** when satisfied to finalize the process.
5. In Figure 377 below, a user has modified the goal review rating from “Most Favourable” to “Less than Expected”.

The image shows a 'Goal Review' dialog box. At the top, the title is 'Goal Review'. Below it, there are two input fields: 'Goal:' with the text 'Quit Smoking' and 'Assessment Date:' with the date 'May 20, 2016'. Below these fields are five radio button options for the goal review rating. The first four are 'Most Favourable', 'More Than Expected', 'Expected', and 'Less Than Expected'. The fifth is 'Most Unfavourable'. The 'Less Than Expected' option is selected, indicated by a blue dot. To the right of each radio button is a text box describing the goal status. For 'Less Than Expected', the text is 'Attempts to abstain but continues to use substances'. At the bottom right of the dialog are two buttons: 'Save' and 'Cancel'.

Figure 377 - Editing Goal Review

Marking a Goal as ‘Achieved’ or ‘Not Active’

Once a user has completed working on a particular goal, they can flag the goal as either “achieved”, or “not active”.

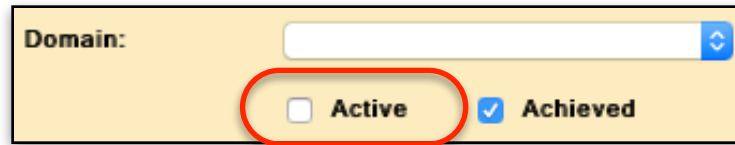
1. In order to modify a previously saved goal review, first locate the desired goal by referring to page 167 above.
2. To mark a goal as **achieved**, check off the “Achieved” check mark as demonstrated in Figure 378.

The image shows a 'Domain:' label followed by a dropdown menu. Below the dropdown are two checkboxes: 'Active' and 'Achieved'. Both checkboxes are checked. The 'Achieved' checkbox is highlighted with a red circle.

Figure 378 - Marking a Goal as “Achieved”

3. Click **Save** to finalize the process.

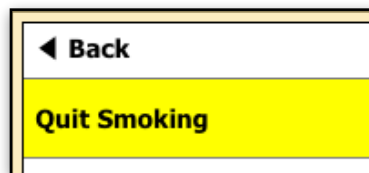
4. To mark a goal as **not active**, uncheck the “Active” check mark as demonstrated in Figure 379.



A screenshot of a user interface element for goal management. It features a yellow background with a 'Domain:' label and a dropdown menu. Below this, there are two checkboxes: 'Active' and 'Achieved'. The 'Active' checkbox is currently unchecked and is highlighted with a red circle, indicating the action to be taken. The 'Achieved' checkbox is checked.

Figure 379 - Marking a Goal as “Not Active”

5. Click **Save** to finalize the process.
6. The “Goals List” will then automatically refresh to display the new ‘not active’ status for the selected goal. This is demonstrated below in Figure 380.

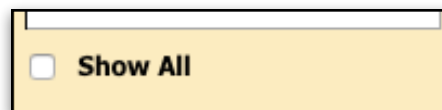


A screenshot of a goal card. At the top, there is a white bar with a left-pointing arrow and the word 'Back'. Below this, the card has a yellow background with the text 'Quit Smoking' in bold black font.

Figure 380 - Goal Successfully Marked as “Not Active”

Show All Goals

1. Once a goal has been marked as “not active”, it will no longer appear in the “Goals List” when loading the module.
2. Users can also bring back previously de-activated goals by clicking on **Show All** as shown in Figure 381.



A screenshot of a button with a yellow background. It contains a small white square icon followed by the text 'Show All' in bold black font.

Figure 381 - Showing All Goals

Follow Up Scheduler Module

The Follow Up Scheduler allows users to create a pre-defined schedule of appointments with a particular client. A user can then complete these follow up's as they occur with the client.

Creating a New Follow Up Schedule

1. To access the Follow Up Scheduler, refer to page 50 above for how to locate the desired client.
2. Once the client has been located and the chart opened, navigate to the **Follow Up Scheduler** as seen in Figure 382.

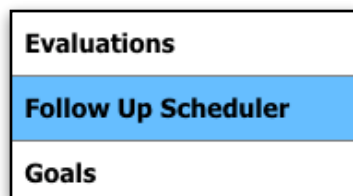


Figure 382 - Follow Up Scheduler

3. The Follow Up Scheduler will then appear on screen as demonstrated in Figure 383.

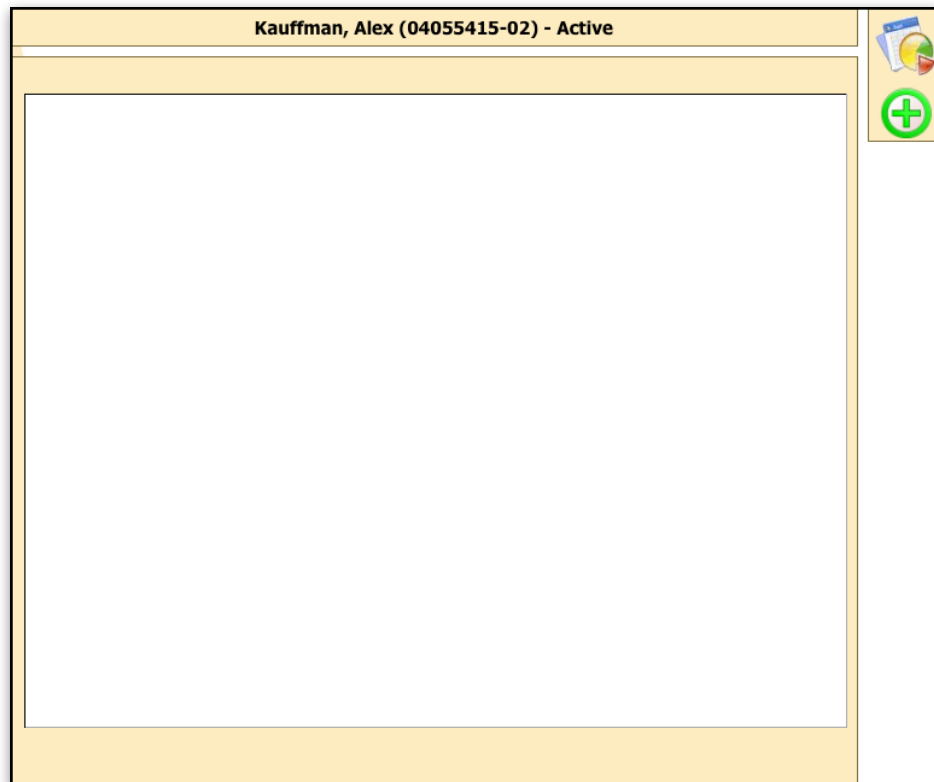


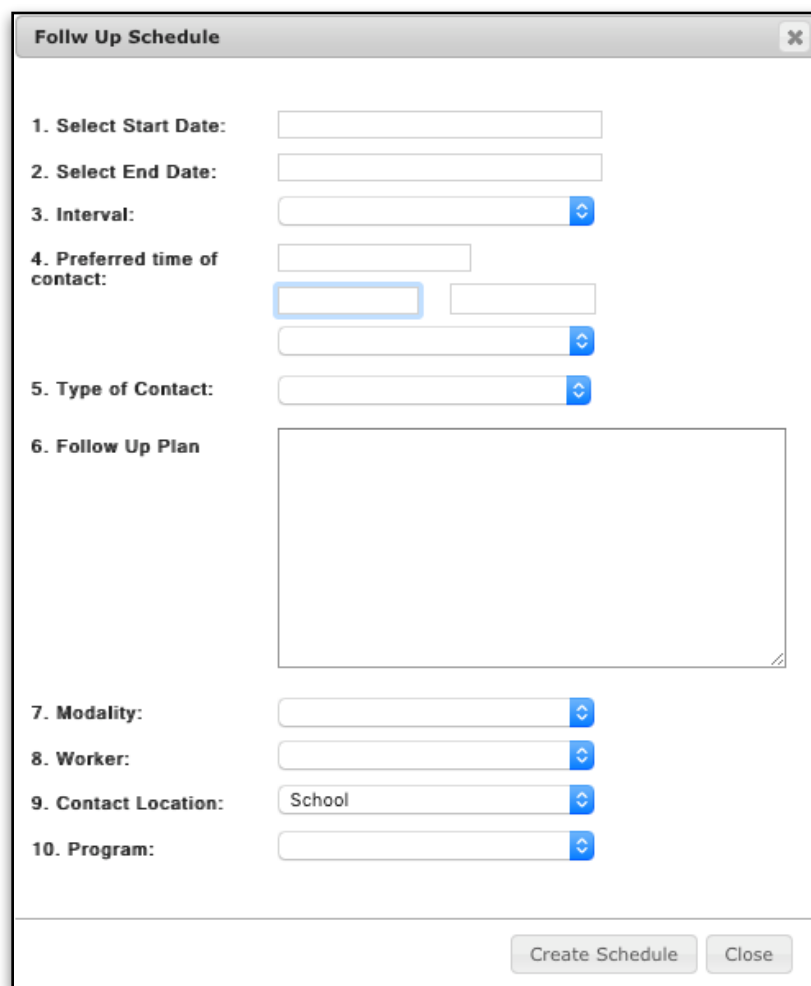
Figure 383 - Follow Up Scheduler

4. To create a new follow up schedule for the click on the **green “+”** as identified in Figure 384.



Figure 384 - Creating a New Follow Up Scheduler

5. The Follow Up Scheduler Dialog will then appear on screen as shown in Figure 385.



Follow Up Schedule

1. Select Start Date:

2. Select End Date:

3. Interval:

4. Preferred time of contact:

5. Type of Contact:

6. Follow Up Plan:

7. Modality:

8. Worker:

9. Contact Location:

10. Program:

Create Schedule Close

Figure 385 - Follow Up Schedule Dialog

6. Fill out the necessary fields to generate the follow up schedule. As can be seen on the following page in Figure 386, a user has filled out the Follow Up Schedule.

Follow Up Schedule

1. Select Start Date: May 20, 2016

2. Select End Date: May 31, 2016

3. Interval: Every day

4. Preferred time of contact: 11AM

5. Type of Contact: Alert

6. Follow Up Plan: Contact Alex and ensure he is taking his daily medications.

7. Modality: Telephone

8. Worker: Christian Gosselin

9. Contact Location: Office

10. Program: Case Management

Create Schedule Close

Figure 386 - Generating Follow Up Schedule

- When satisfied with the inputted Follow Up Schedule information, click **Create Schedule** as demonstrated in Figure 387.

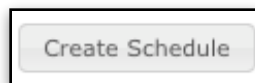


Figure 387 - Creating Schedule

- A message box will appear confirming the process was successful.

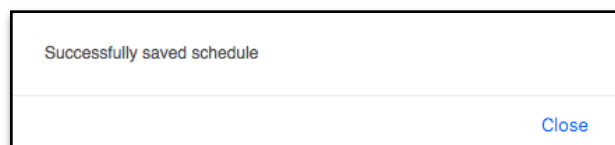


Figure 388 - Successfully Generated Follow Up Schedule

9. The Follow Up Module will then refresh, and the schedule will appear on screen as demonstrated in Figure 389.

Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: May 30, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: May 28, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: May 26, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: May 24, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: May 22, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: May 20, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			

Figure 389 - Reviewing Follow Up Schedule

Modifying an Existing Follow Up Item

It maybe necessary for a user to modify or update a pre-existing Follow Up Item.

1. Refer to page 174 above for how to access the Follow Up Scheduler.
2. Locate the Follow Up Item which requires modification.
3. **Click** on the Follow Up Item to load it on screen as shown in Figure 390. (see following page).

Follow Up Schedule

1. Select Start Date: May 31, 2016

2. Select End Date: May 31, 2016

3. Interval: [dropdown]

4. Preferred time of contact: [text input]

5. Type of Contact: Consult [dropdown]

6. Follow Up Plan: Perform a consultation with Alex and verify his CDS statuses. Ensure he has all the support necessary.

7. Modality: Telephone [dropdown]

8. Worker: Christian Gosselin [dropdown]

9. Contact Location: School [dropdown]

10. Program: Case Management [dropdown]

[Update Item] [Close]

Figure 390 - Modifying an Existing Follow Up Item

4. Modify the fields as necessary - note that the “pink” fields indicate they are locked.
5. Once satisfied with the changes, click **Update Item** as seen below.

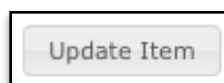


Figure 391 - Updating Follow Up Item

CDS History Module

The CDS History allows users to review all inputted CDS across in one easy module. Users can chose the CDS value they wish to review, and all data will be displayed.

1. To access the CDS History, refer to page 50 above for how to locate the desired client.
2. Once the client has been located and the chart opened, navigate to the **CDS History** as seen in Figure 392.

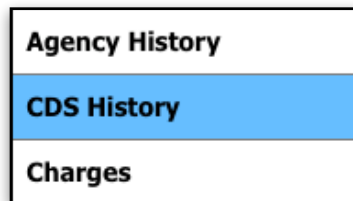


Figure 392 - CDS History

3. The CDS History module will then appear on screen as demonstrated in Figure 393.

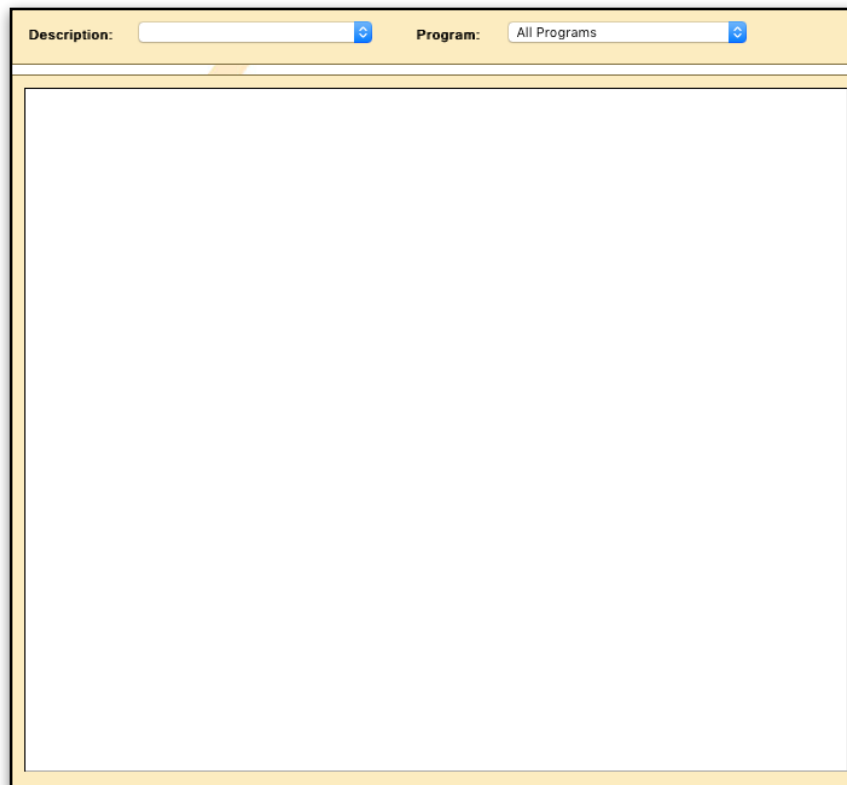


Figure 393 - CDS History

Reviewing CDS History

1. In order to review CDS History, refer to page 179 above for how to access the CDS History module.
2. From the **Description** drop down, select the desired CDS value to review. This is demonstrated in Figure 394 below.

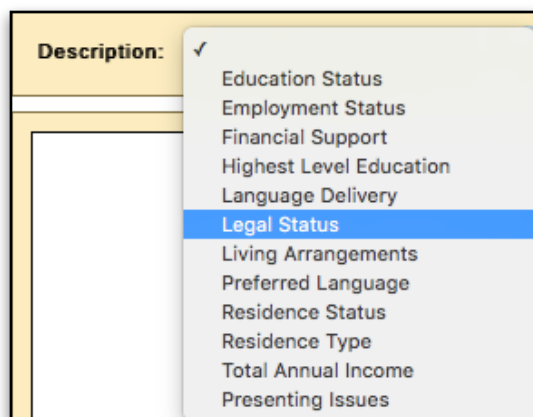


Figure 394 - Reviewing CDS History

3. Upon selecting the desired CDS value to review, the module will then automatically refresh. Figure 395 and Figure 396 below demonstrate reviewing two different CDS values.

Value	Start Date	Program	Base Line	End Date	Client Number	
Court Diversion Program	2016-05-26	Case Management	Yes		04055415-02	

Figure 395 - Reviewing CDS Legal History

Value	Start Date	Program	Base Line	Client Number	
Spouse/partner	2016-05-26	Case Management	Yes	04055415-02	

Figure 396 - Reviewing CDS Living Arrangements History

4. Repeat the instructions above to review any other desired CDS values.

End-Dating a Legal Status

1. Certain CDS data points allow for special operations.
2. Legal Status is one of those fields. A user can “end-date” a Legal Status if desired.
3. Refer to page 179 above for how to access the **CDS History** module.
4. From the **Description** drop down, select **Legal Status**.

5. The CDS History module will refresh as shown in Figure 397.

Value	Start Date	Program	Base Line	End Date	Client Number	
Court Diversion Program	2016-05-26	Case Management	Yes		04055415-02	

Figure 397 - "End-Dating" a CDS Legal Status

6. Click on the **calendar icon** as identified above in Figure 397.

Set End Date

Jun 03, 2016

Ok

Cancel

Figure 398 - Setting "End-Date" to CDS Legal Status

7. In Figure 398 above, the user has set the "End-Date" to June 3, 2016.
8. Click **Ok** when satisfied with the date to finalize the process.
9. The CDS History module will automatically refresh to reflect the newly modified "End-Date". This is reflected in Figure 400.

Value	Start Date	Program	Base Line	End Date	Client Number	
Court Diversion Program	2016-05-26	Case Management	Yes	2016-06-03 	04055415-02	

Figure 400 - Successfully Set the "End-Date" for a CDS Legal Status Entry

Deleting a CDS Historical Entry

1. A user can delete a CDS entry if necessary.
2. Refer to page 179 above for how to access the CDS History module.
3. Chose the CDS value from the **Description** drop down.
4. The CDS History module will then refresh.

Value	Start Date	Program	Base Line	End Date	Client Number	
Court Diversion Program	2016-05-26	Case Management	Yes		04055415-02	

Figure 401 - Deleting a CDS Historical Entry



Should a user not see “RED X” icon, they do not have the necessary access rights. Verify their User/User Group permissions.

5. Click on the **red X** as identified in Figure 401 (see preceding page).
6. A message box will appear as shown in Figure 402 asking the user to confirm the deletion.

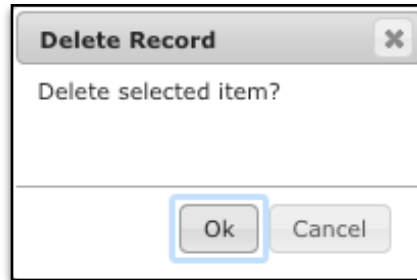


Figure 402 - Deleting a CDS Historical Entry

7. Click **Ok** to finalize the process.
8. A message box will appear confirming the process was indeed successful.

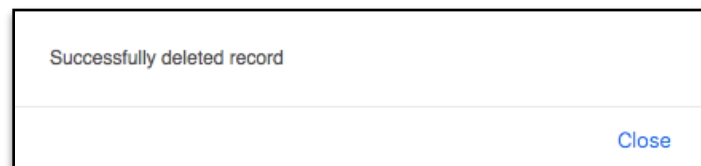


Figure 403 - Successfully Deleted CDS Historical Entry

9. The CDS History module will then automatically refresh.

Value	Start Date	Program	Base Line	End Date	Client Number

Figure 404 - CDS History Module Has Been Refreshed

Scheduler Module

The Scheduler module allows users to create calendars, share calendars (choosing who can view and edit), and adding client or work appointments to these calendars. Users can each individually customize their own colour codes to make the Schedule Module unique to them. Users can also add resources to appointments and use the corresponding filters to easily locate a scheduled item.

1. To access the Scheduler module, refer to page 14 above for how to login to CRMS Web.
2. Once successfully logged into the software, click **View -> Scheduler** as seen in Figure 405 below.

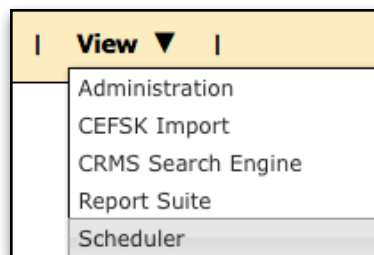


Figure 405 - Scheduler Module

3. The Scheduler module will then appear on screen as demonstrated in Figure 406.

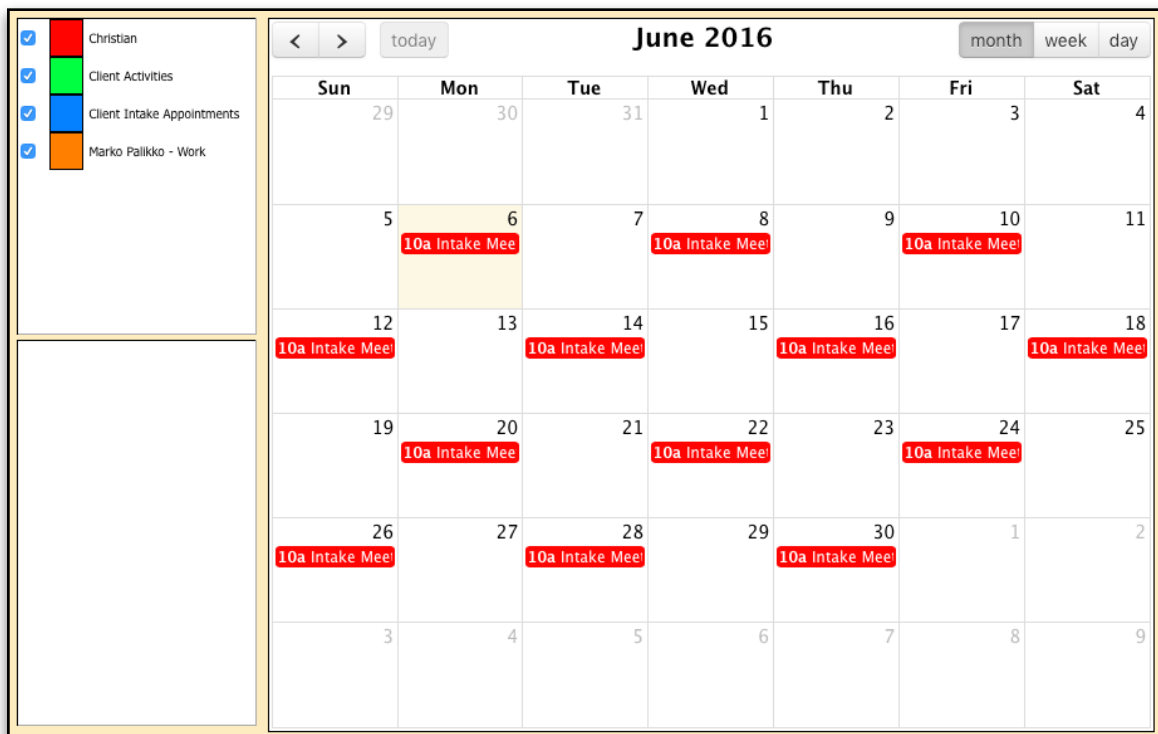


Figure 406 - Scheduler Module

Creating a New Calendar

1. In order to create a new appointment, a calendar must first be created.
2. To create a new calendar, refer to page 183 above for how to access the Scheduler module.
3. Should the calendar list not be visible, it must first be activated. Notice in Figure 407 below, the calendars are not visible.

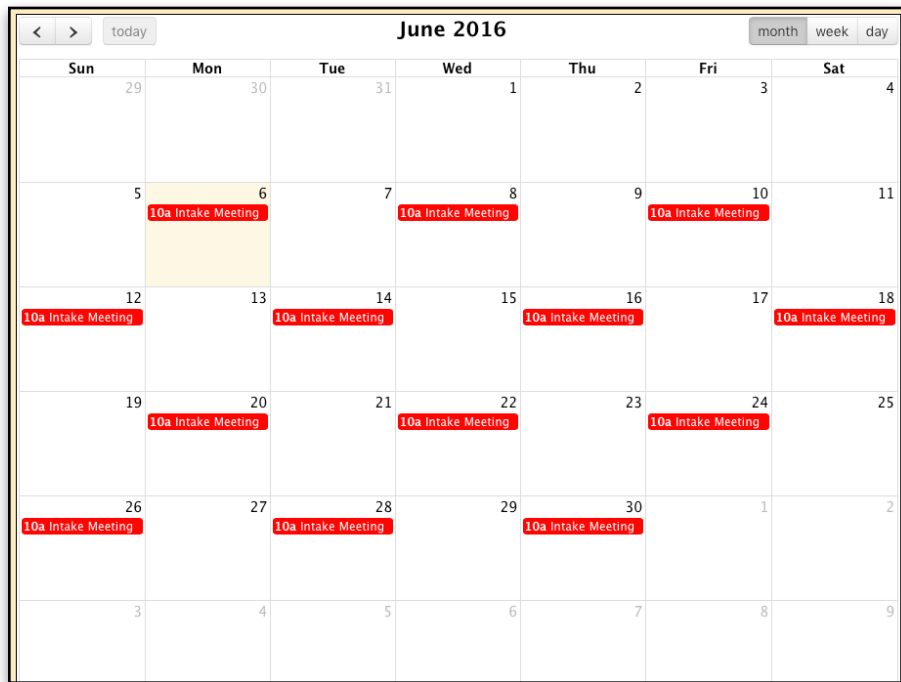


Figure 407 - Scheduler Module (Calendars Not Visible)

4. In the **Tools** menu, click on **Calendar & Filters** as seen in Figure 408.

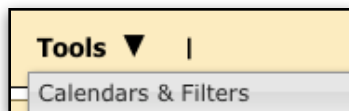


Figure 408 - Enabling Calendars and Filters

5. The “Calendars” will then appear on the left hand side of the Scheduler module.

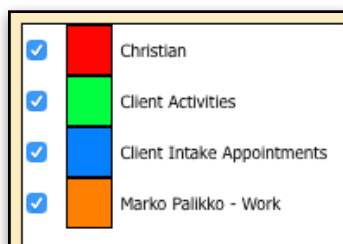


Figure 409 - Viewing Calendars

6. **Click** anywhere in the empty white space in the “Calendars” section. The section is identified in Figure 410.

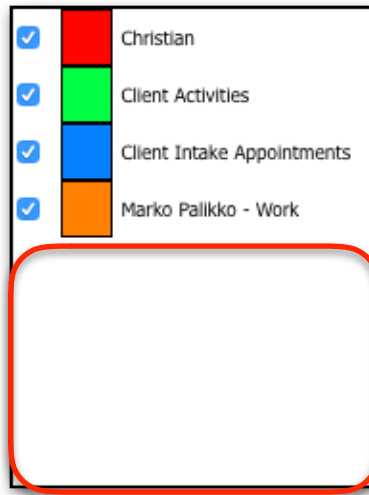


Figure 410 - Creating a New Calendar

7. The “Entity Actions” menu will then appear on screen as seen in Figure 411 below. Click **Create New Calendar** to create a new calendar.

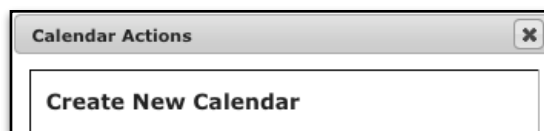


Figure 411 - Creating a New Calendar

8. The **New Calendar** dialog will then appear on screen. As can be seen in Figure 412 a user is creating a new calendar named “*Steve’s Calendar*”.

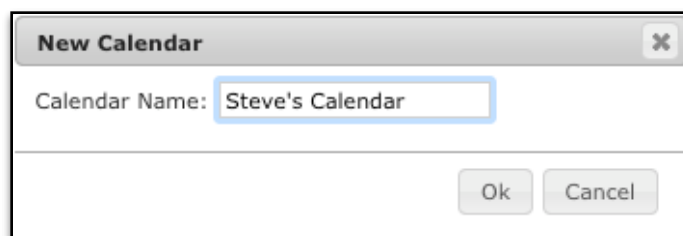


Figure 412 - Creating a New Calendar

9. Click **Ok** to finalize the process.
10. A message box will appear confirming the process (see following page).

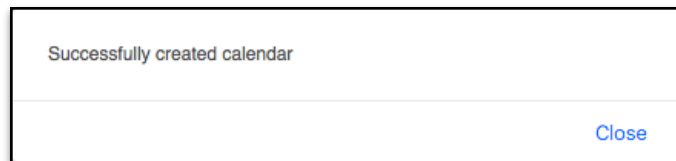


Figure 413 - Successfully Created Calendar

11. The Scheduler module will automatically refresh, and the newly created calendar will then appear as shown in Figure 414.



Figure 414 -Successfully Created New Calendar

Changing a Calendar's Colour

1. Once a calendar has been created, a user can then customize the calendar colour as desired.
2. Refer to page 183 above for how to access the Scheduler module and for how to create a new calendar.
3. **Click** on the desired calendar which will be modified. As can be seen in Figure 415, a user has clicked on "Steve's Calendar".

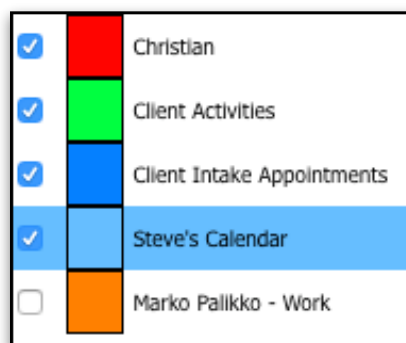


Figure 415 - Changing a Calendar's Colour

4. The "Entity Actions" menu option will pop up presenting the user with several choices.
5. This is demonstrated in Figure 416 (see following page).

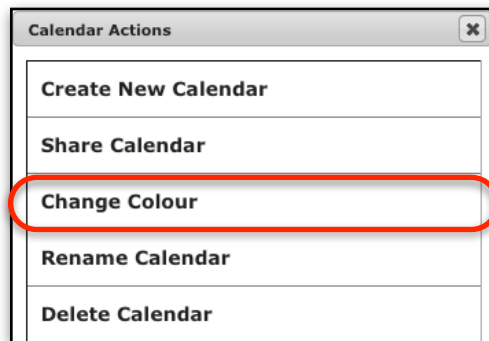


Figure 416 - Changing Calendar Colour

6. Click on **Change Colour** as seen above in Figure 416.
7. The **Change Colour** Dialog will then appear on screen as shown in Figure 417.



Figure 417 - Changing Calendar Colour

8. A user can then click on the **arrow** on the Change Colour Dialog to bring up the colour picker demonstrated in Figure 418.

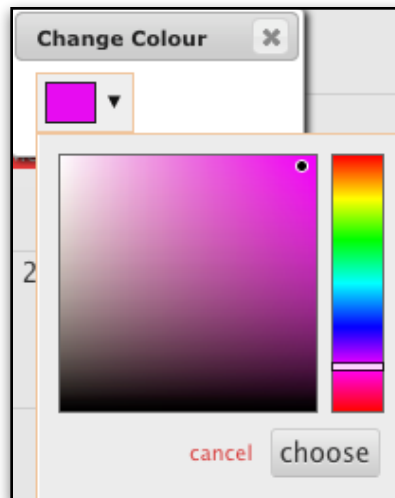


Figure 418 - Selecting a Custom Colour for a Calendar

9. As can be seen in Figure 418 above, a user has modified their calendar colour to purple.
10. Click **Choose** to complete the process.
11. The Scheduler module will then automatically refresh and the new calendar colour will be updated (see following page).



Figure 419 - Successfully Modified Calendar Colour



****TIPS AND TRICKS* - Each user can customize another users' calendar colours. The colours are unique for each worker!***

Renaming a Calendar

1. In order to rename a calendar, first access the Scheduler module as described above on page 183.
2. Locate the calendar which will be renamed.
3. **Click** on the desired calendar to bring up the “Entity Actions” menu option.
4. In Figure 420, a user is renaming the “Client Intake Appointments” calendar.



Figure 420 - Renaming a Calendar

5. From the list of available choices in the “Entity Actions” menu, click on **Rename Calendar**.



Figure 421 - Renaming Calendar

6. The **Rename Calendar** dialog will then appear on screen (see following page).

7. As can be seen in Figure 422 below, a user is renaming the calendar to “Intake Appointments”.

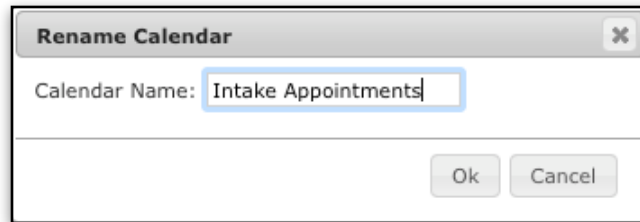
A dialog box titled "Rename Calendar" with a close button (X) in the top right corner. It contains a text input field labeled "Calendar Name:" with the text "Intake Appointments" entered. At the bottom right, there are two buttons: "Ok" and "Cancel".

Figure 422 - Renaming Calendar

8. When satisfied with the changes, click **Ok** to complete the process.
9. A message box will appear confirming the process was indeed successful.

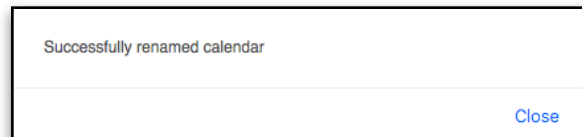
A message box with the text "Successfully renamed calendar" and a "Close" button in the bottom right corner.

Figure 423 - Successfully Renamed Calendar

10. The Scheduler module will then automatically refresh and the newly renamed calendar will be visible. This is demonstrated in Figure 424 below.

A list of calendars in the Scheduler module. Each item has a checkbox, a colored square, and a label. The items are: "Christian" (red square), "Client Activities" (green square), and "Intake Appointments" (blue square). All checkboxes are checked.

Figure 424 - Reviewing Newly Renamed Calendar

Deleting a Calendar

1. In order to delete a calendar, first access the Scheduler module as described on page 183.
2. Locate the client which is to be deleted.
3. **Click** on it to bring up the “Entity Actions” menu option.

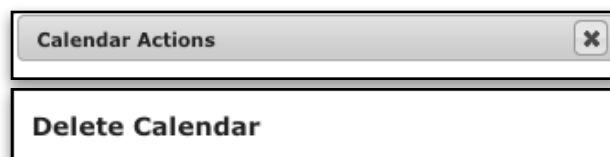
A dialog box titled "Calendar Actions" with a close button (X) in the top right corner. It contains a button labeled "Delete Calendar".

Figure 425 - Deleting a Calendar

4. Click **Delete Calendar** (as seen in Figure 425 on previous page).
5. The user will be presented with a prompt to confirm the calendar deletion as shown in Figure 426.

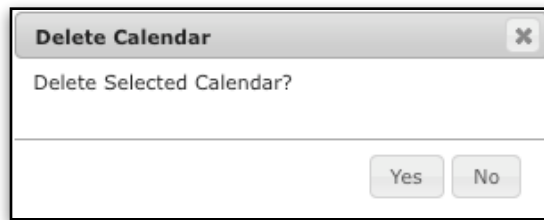


Figure 426 - Confirming Calendar Deletion

6. A message box will then appear confirming the calendar was successfully deleted.

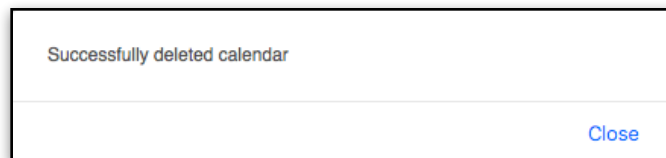


Figure 427 - Successfully Deleted Calendar

7. The Scheduler will then automatically refresh, and the newly deleted calendar will disappear from the list.

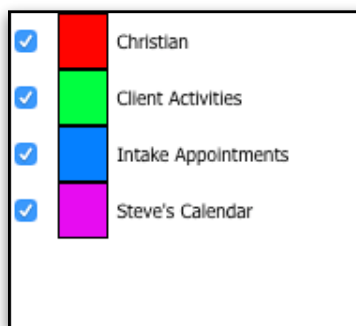


Figure 428 - Confirming Successful Calendar Deletion



****TIPS AND TRICKS* - A user can only deleted or rename calendars they have created. They cannot delete/rename another users' calendar.***

Sharing a Calendar

1. In order to share a calendar with another user (so they can make modifications on the users' behalf), the calendar must first be shared.
2. Access the Scheduler module as demonstrated on page 183.
3. Locate the calendar which will be shared.
4. **Click** on the desired calendar to bring up the "Entity Actions" menu option.



Figure 429 - Sharing a Calendar

5. In Figure 429, a user is sharing the "Intake Appointments" calendar.
6. Click **Share Calendar** as seen in Figure 430.

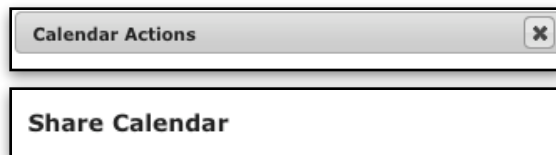


Figure 430 - Sharing a Calendar

7. The Share Calendar Dialog will then appear on screen as seen below in Figure 431.

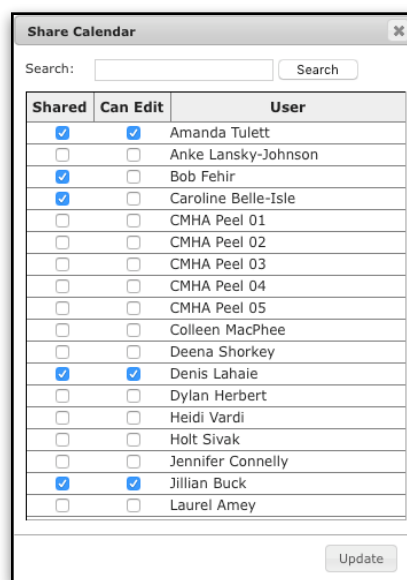


Figure 431 - Shared Calendar Dialog

8. As can be seen in a more detailed screenshot in Figure 432, the user can select which other users can see their calendar (the “Shared” column) and which users can also modify the calendar (“Can Edit” column).

Shared	Can Edit	User
☒	☒	Amanda Tulett
☐	☐	Anke Lansky-Johnson
☒	☐	Bob Fehir
☒	☐	Caroline Belle-Isle
☐	☐	CMHA Peel 01
☐	☐	CMHA Peel 02
☐	☐	CMHA Peel 03
☐	☐	CMHA Peel 04
☐	☐	CMHA Peel 05
☐	☐	Colleen MacPhee
☐	☐	Deena Shorkey
☒	☒	Denis Lahaie
☐	☐	Dylan Herbert
☐	☐	Heidi Vardi
☐	☐	Holt Sivak
☐	☐	Jennifer Connelly
☒	☒	Jillian Buck
☐	☐	Laurel Amey

Figure 432 - Sharing a Calendar

9. As can be seen in Figure 432 above, certain staff have been given access to view and edit the calendar where as other workers only have the “View” ability.
10. A users can also search for the desired worker using the **Search text box** in order to quickly filter the user list.
11. When satisfied with the changes, click **Update** to finalize the process.
12. A message box will appear confirming the process was indeed successful.

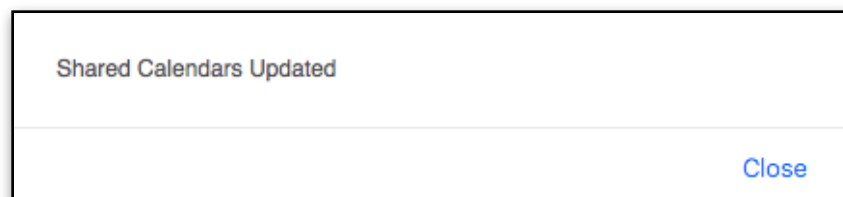


Figure 433 - Successfully Updated Shared Calendar Settings

Schedule a New Item

1. In order to create a new scheduled item in the Scheduler module, first access the Scheduler module as described on page 183 above.
2. Click on the desired date for the appointment (it can be modified later if necessary) to bring up the “Entity Actions” menu.
3. Click on **Schedule New Item** as seen in Figure 434 below.

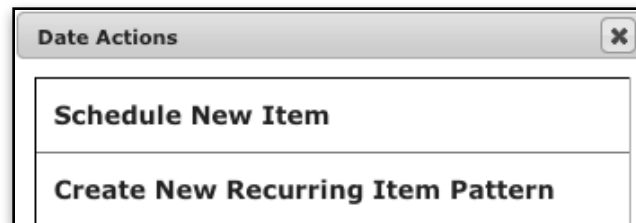


Figure 434 - Schedule New Item

4. The **Schedule Item** Dialog will then appear as illustrated in Figure 435.

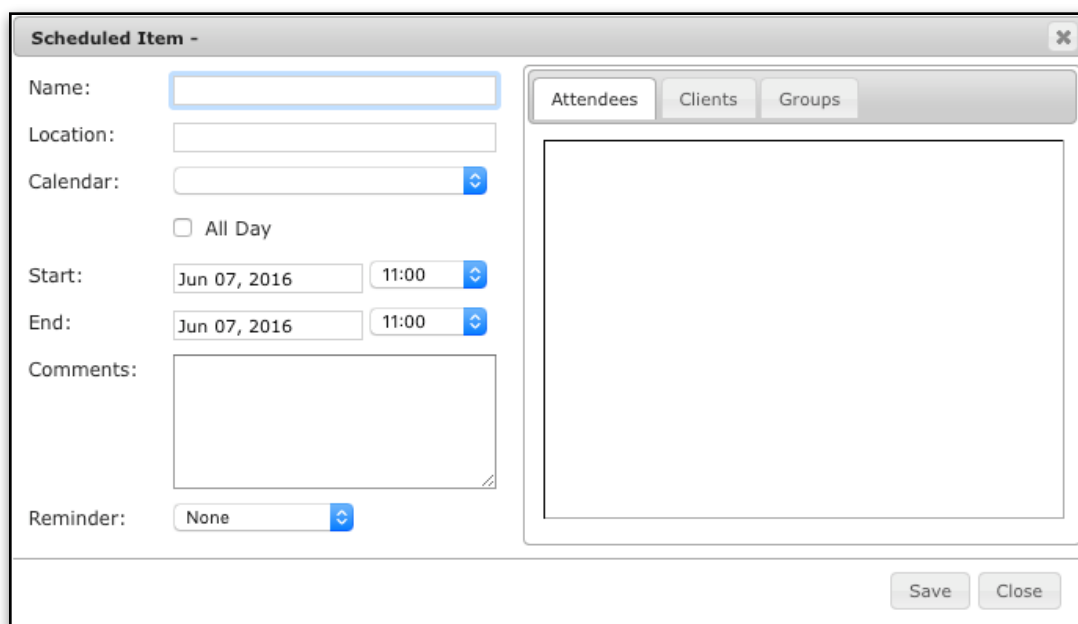


Figure 435 - Schedule Item Dialog

5. Fill out the necessary details. The Schedule Item dialog is separated into various sections. These sections will be demonstrated further below.
6. As can be seen in Figure 436 (see following page), a user has inputted the basic appointment details for a new scheduled item.
7. The name, location, calendar, start time, end time, comments and a reminder alert have all been inputted (see following page).

Scheduled Item -

Name: Case Management Intake Meeting

Location: Board Room

Calendar: Intake Appointments

☐ All Day

Start: Jun 07, 2016 13:00

End: Jun 07, 2016 14:00

Comments: Discuss the wait list and case load for the Case Management program.

Reminder: 15 minutes

Figure 436 - Inputting Basic Appointment Information for a New Scheduled Item

8. On the right hand side of the Scheduled Item Dialog, a user can also add this scheduled item to any other calendars for which they have been granted the ability to edit.
9. This is demonstrated in Figure 437 below.

Attendees Clients Groups

☐ Christian

☐ Client Activities

☐ Steve's Calendar

Figure 437 - Scheduling Item on Other Calendars at Same Time

10. Note in Figure 437 above, a user has decided to NOT schedule this appointment on any other calendars.
11. If desired, a user can also add clients or client groups, directly to the scheduled item.
12. This will save them some time when attempting to perform documentation for this appointment.
13. Click on the **Clients** tab as demonstrated in Figure 438.

Attendees Clients Groups

Figure 438 - Adding Clients to a Scheduled Item

14. The “Clients” section of the Scheduled Item will then appear as demonstrated below.

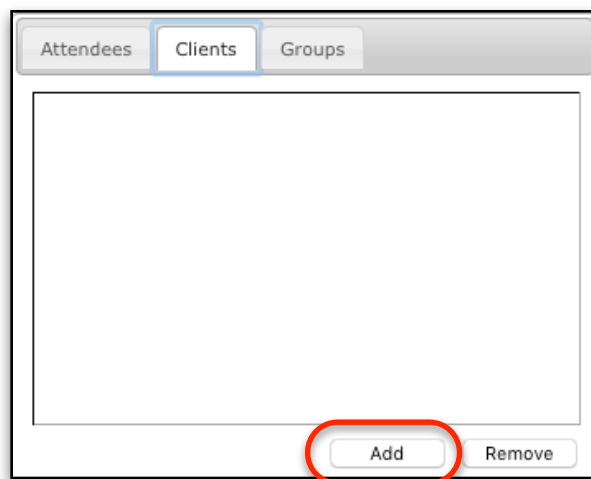


Figure 439 - Adding Clients to a Scheduled Item

15. Click **Add** to bring up the “Search Clients” dialog. As can be seen in Figure 440, a user is searching for the client “kauff”.

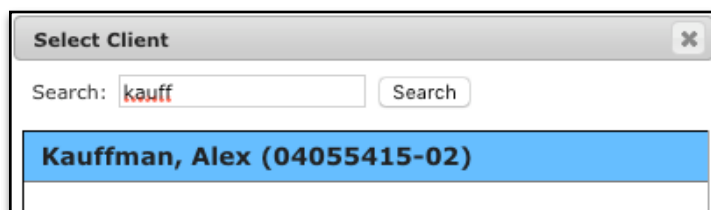


Figure 440 - Adding Clients to a Scheduled Item

- 16. A user can add as many clients as necessary.
- 17. Repeat the steps above if more clients must be added to the appointment.
- 18. Once satisfied with the clients whom have been added, close the search screen.
- 19. Any clients which have been searched and located, will automatically be added to the “Clients” list.

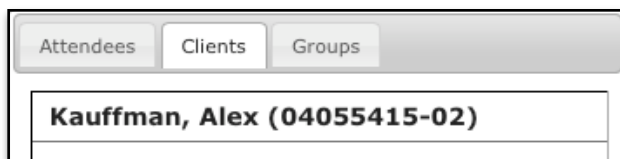


Figure 441 - Successfully Added Client to the Scheduled Item

- 20. A user can also add a “group” if desired to the schedule item.
- 21. Click on the **Groups** tab as shown in Figure 442 (see following page).



Figure 442 - Adding a "Group" to a Scheduled Item

22. The "Groups" section of the Scheduled Item will then appear on screen.
23. Click **Add** to bring up the "Group Search Dialog".

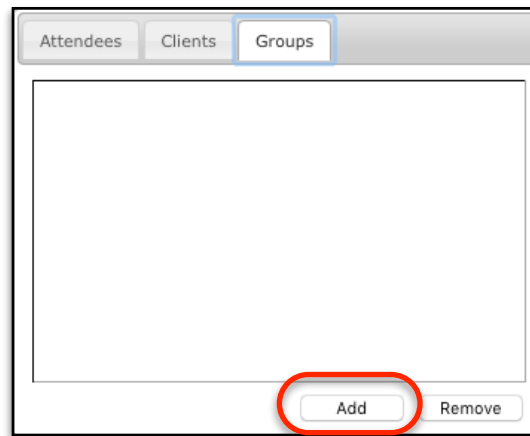


Figure 443 - Adding a Group to the Scheduled Item

24. Perform a search for the group, and click on the desired group to add them to the scheduled item.

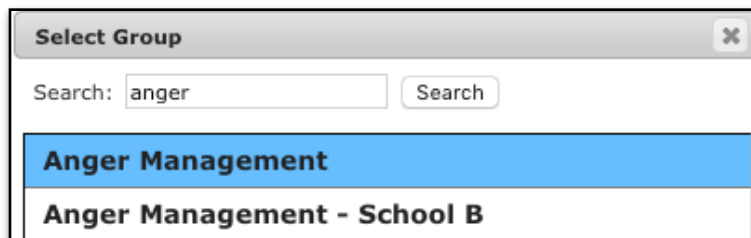


Figure 444 - Adding a Group to the Scheduled Item

25. Once satisfied with the groups whom have been added, close the search screen.

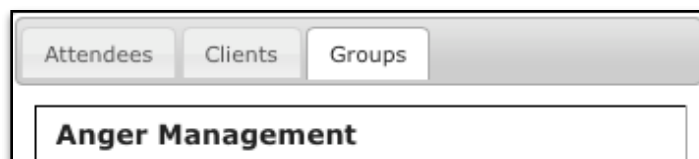


Figure 445 - Successfully Added Group to the Scheduled Item

26. Once satisfied with the inputted information, click **Save** to finalize the process.

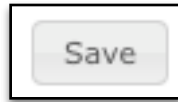


Figure 446 - Saving a Scheduled Item

27. The Scheduled Item Dialog will close, and the newly scheduled item will appear on the calendar.

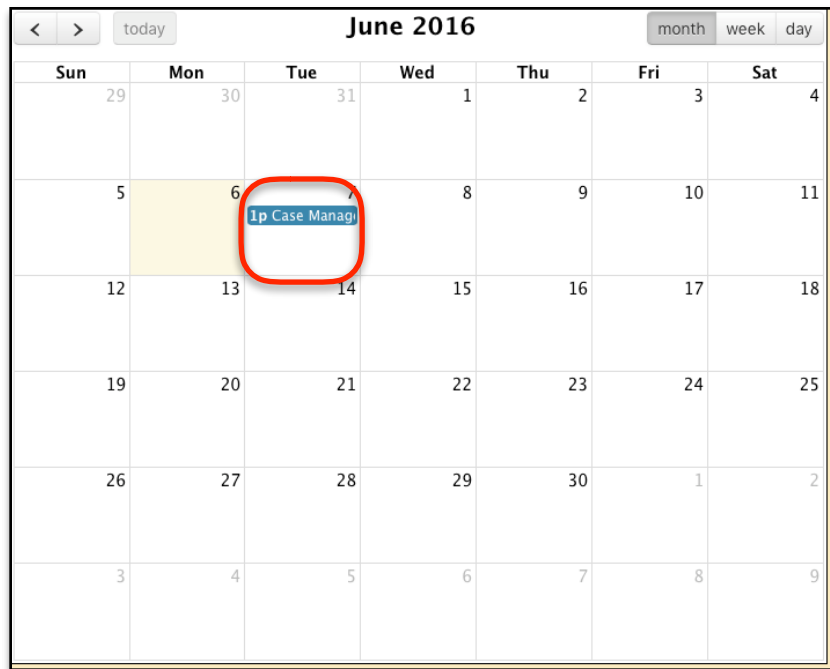


Figure 447 - Successfully Scheduled a New Item

Viewing Calendar in a Different Layout

If desired, a user can review the calendar in a month view, a week view, or a daily view.

1. Refer to page 183 above for how to access the Scheduler module.
2. To the right of the “month and year” being reviewed, locate the “month/week/day” buttons as demonstrated in Figure 448 below.

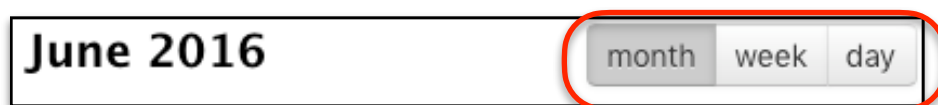


Figure 448 - Viewing Calendar in a Different Layout

3. To view the calendar in a “week” format, click on **Week**.
4. The Scheduler module will then automatically refresh as seen in Figure 449 (see following page).

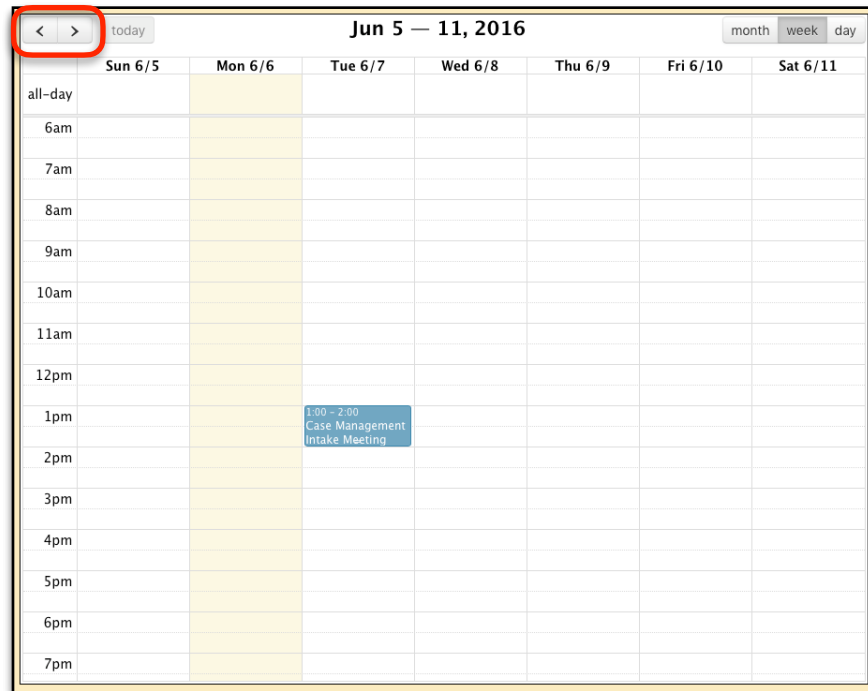


Figure 449 - Reviewing Scheduler in a "Week" Format

5. A user can switch between the weeks by clicking on the **arrows** identified in Figure 449.
6. Alternatively, a user can also click on "day" to get a day view of the calendar instead. This is demonstrated in Figure 450 below.

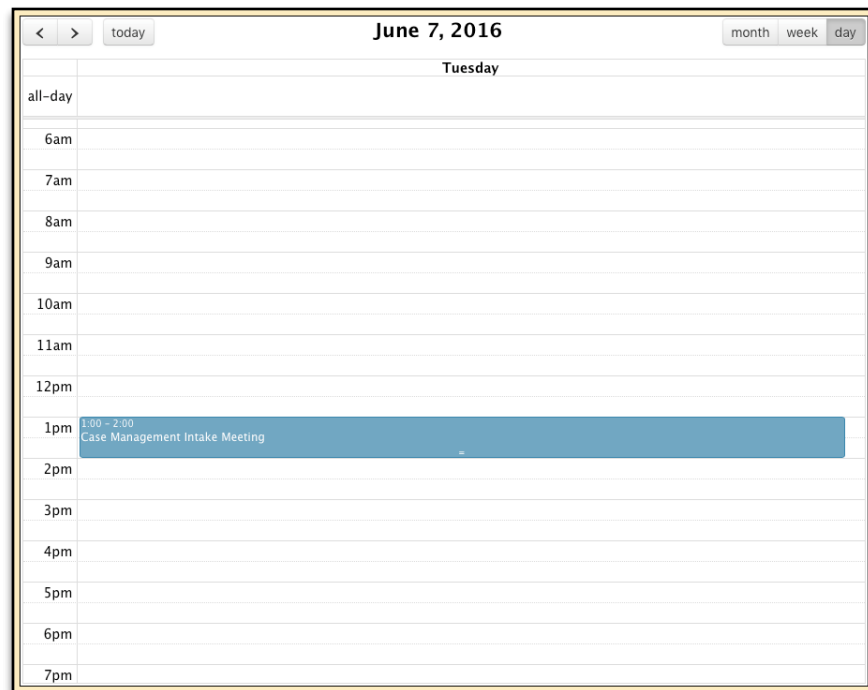


Figure 450 - Reviewing Scheduler in a "Day" Format

Schedule a Recurring Item

1. In order to create a new recurring item in the Scheduler module, first access the Scheduler module as described on page 183 above.
2. Click on the desired date for the appointment (it can be modified later if necessary) to bring up the “Entity Actions” menu.
3. Click on **Create New Recurring Item Pattern** as seen in Figure 451 below.

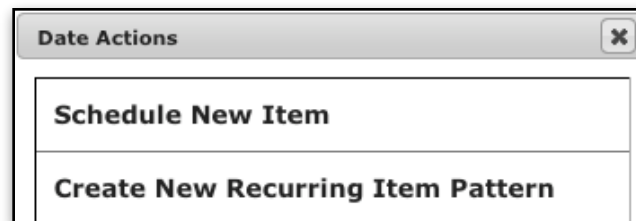


Figure 451 - Create New Recurring Item Pattern

4. The **Recurring Item** Dialog will then appear as illustrated in Figure 452.

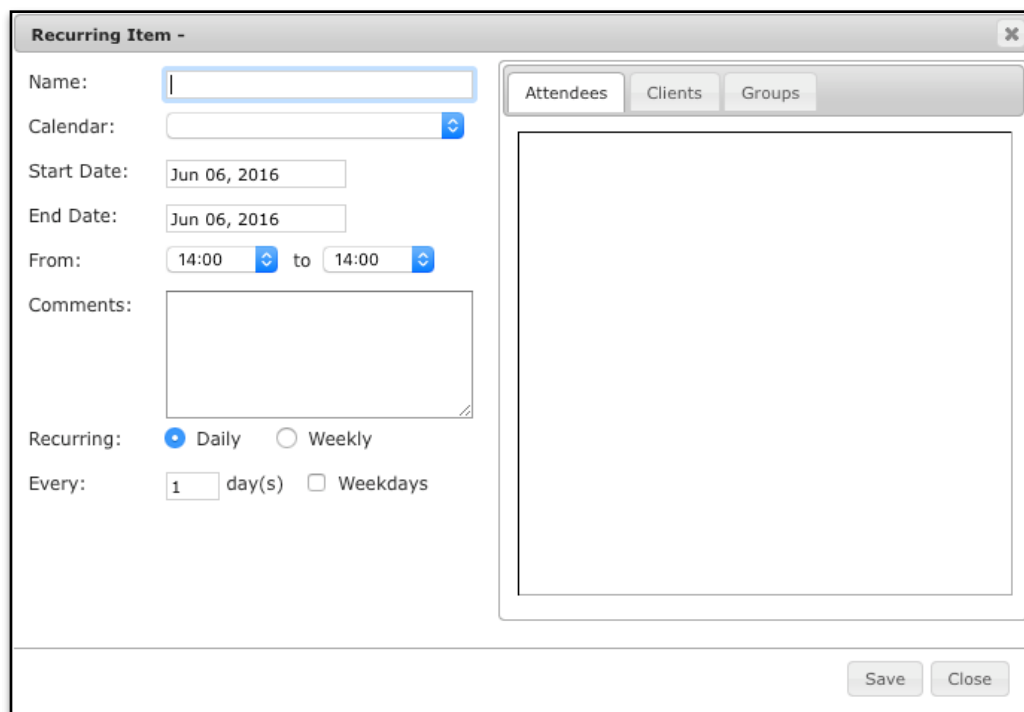
A screenshot of a software dialog box titled "Recurring Item -". It has a close button (X) in the top right corner. The dialog is divided into two main sections. The left section contains form fields: "Name:" (text input), "Calendar:" (dropdown menu), "Start Date:" (date input, showing "Jun 06, 2016"), "End Date:" (date input, showing "Jun 06, 2016"), "From:" (time input, showing "14:00" to "14:00"), and "Comments:" (text area). Below these fields are radio buttons for "Recurring:" with "Daily" selected and "Weekly" unselected. Below that is a label "Every:" followed by a text input "1" and the text "day(s)", and an unselected radio button for "Weekdays". The right section has three tabs: "Attendees", "Clients", and "Groups". The "Attendees" tab is active, showing a large empty list area. At the bottom right of the dialog are "Save" and "Close" buttons.

Figure 452 - Creating a New Recurring Item Pattern

5. Fill out the necessary details. The Recurring Item dialog is separated into various sections. These sections will be demonstrated further below.
6. As can be seen in Figure 453 (see following page), a user has inputted the basic appointment details for a new scheduled item.

7. The name, calendar, start date, end date, start time, end time, comments and recurring pattern have all been inputted. In Figure 453, the user is scheduling appointments between June 6, 2016 and June 30, 2016 occurring weekly, for every two days, on Monday, Wednesday and Friday.

The 'Recurring Item' dialog box contains the following information:

- Name:** Ensure Alex is Taking Medications
- Calendar:** Client Activities
- Start Date:** Jun 06, 2016
- End Date:** Jun 30, 2016
- From:** 15:00 to 15:15
- Comments:** Contact Alex via the telephone and ensure Alex is taking his bi-daily medication.
- Recurring:** Weekly (selected)
- Every:** 2 day(s)
- Days:** Monday, Wednesday, Friday (selected)

Figure 453 - Creating a New Recurring Item Pattern

8. Refer to the section above on page 195-196 for how to add clients, or groups to this scheduled item.
9. Figure 454 below demonstrates the Recurring Item Dialog prior to the user hitting save.

The 'Recurring Item' dialog box is shown with the 'Attendees' tab selected. The details on the left are identical to Figure 453. The right-hand pane displays the following:

- Attendees:** Kauffman, Alex (04055415-02)
- Buttons:** Add, Remove
- Footer:** Save, Close

Figure 454 - Creating a New Recurring Item Pattern

10. Once satisfied with the inputted details, click **Save** to finalize the process.

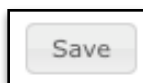


Figure 455 - Saving Recurring Item Pattern

11. The newly scheduled recurring items will appear on the Scheduler module as demonstrated in Figure 456 below.

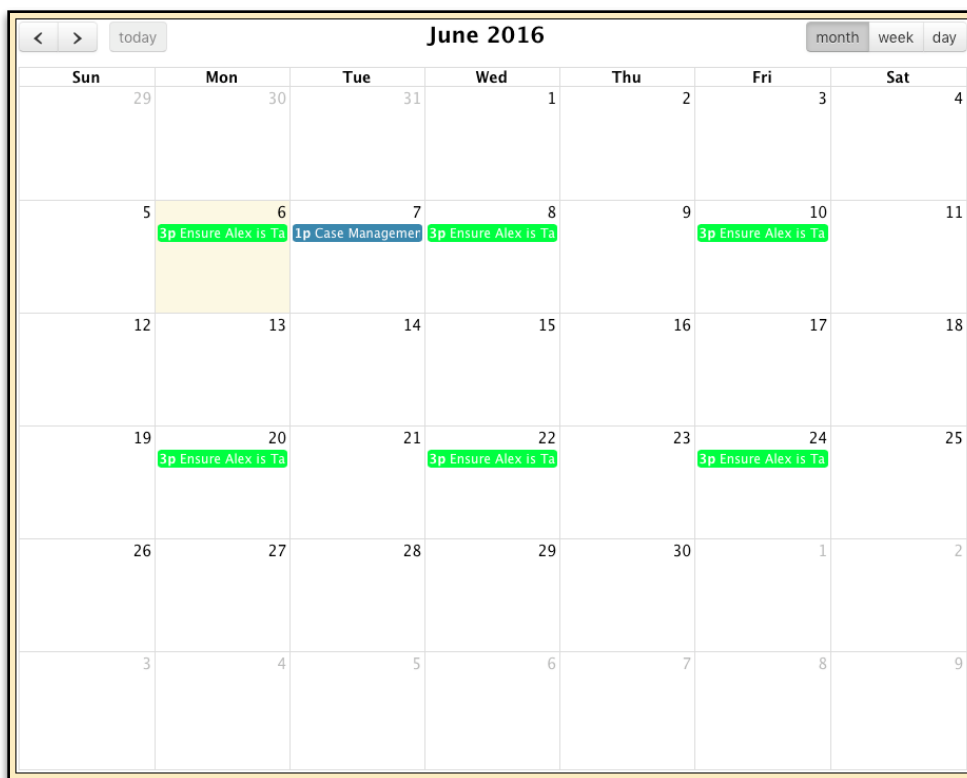


Figure 456 - Successfully Created Recurring Item Pattern

Changing Scheduled Item

1. Should a user need to modify a previously scheduled item, they can follow the instructions below.
2. Access the Scheduler module as described on page 183 above.
3. Locate the Scheduled Item which requires modifications and **click** on the item to bring up the “Entity Actions” menu.

4. Click **Change Scheduled Item** as seen in Figure 457.

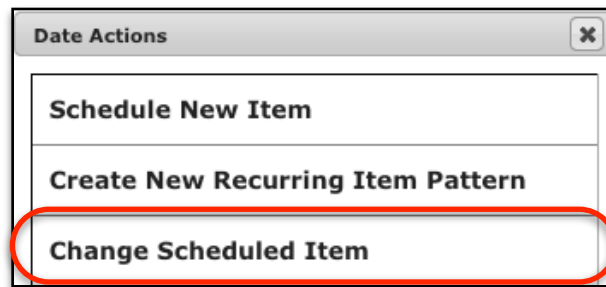


Figure 457 - Changing Scheduled Item

5. The Scheduled Item Dialog will then appear allowing the user to make any desired modifications.

A screenshot of a 'Scheduled Item - Case Management Intake Meeting' dialog box. The title bar says 'Scheduled Item - Case Management Intake Meeting'. The form has several fields: 'Name' (Case Management Intake Meeting), 'Location' (Board Room), 'Calendar' (Intake Appointments), 'All Day' (unchecked), 'Start' (Jun 07, 2016, 13:00), 'End' (Jun 07, 2016, 14:00), 'Comments' (Discuss the wait list and case load for the Case Management program.), and 'Reminder' (15 minutes). On the right, there are tabs for 'Attendees', 'Clients', and 'Groups'. Under 'Attendees', there is a list with checkboxes for 'Christian', 'Client Activities', and 'Steve's Calendar'. At the bottom right are 'Save' and 'Close' buttons.

Figure 458 - Modifying Previously Saved Scheduled Item

6. When satisfied with the changes, click **Save** to finalize the process.



****TIPS AND TRICKS* - Should the “Change Scheduled Item” choice not appear in the “Entity Actions” menu, the user has likely clicked on a recurring item pattern. Use the instructions below for that instance.***

Changing Recurring Item Pattern

1. Should a user need to modify a previously scheduled recurring item, they can follow the instructions below.
2. Access the Scheduler module as described on page 183 above.
3. Locate the Scheduled Item which requires modifications and **click** on the item to bring up the “Entity Actions” menu.
4. Click **Change Recurring Item Pattern** as demonstrated below in Figure 459.

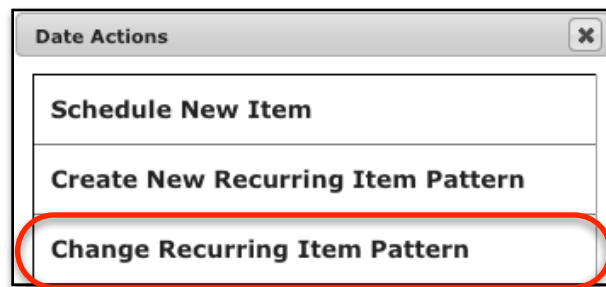


Figure 459 - Changing Recurring Item Pattern

5. The Recurring Item Dialog will then appear on screen allowing the user to make any further modifications.

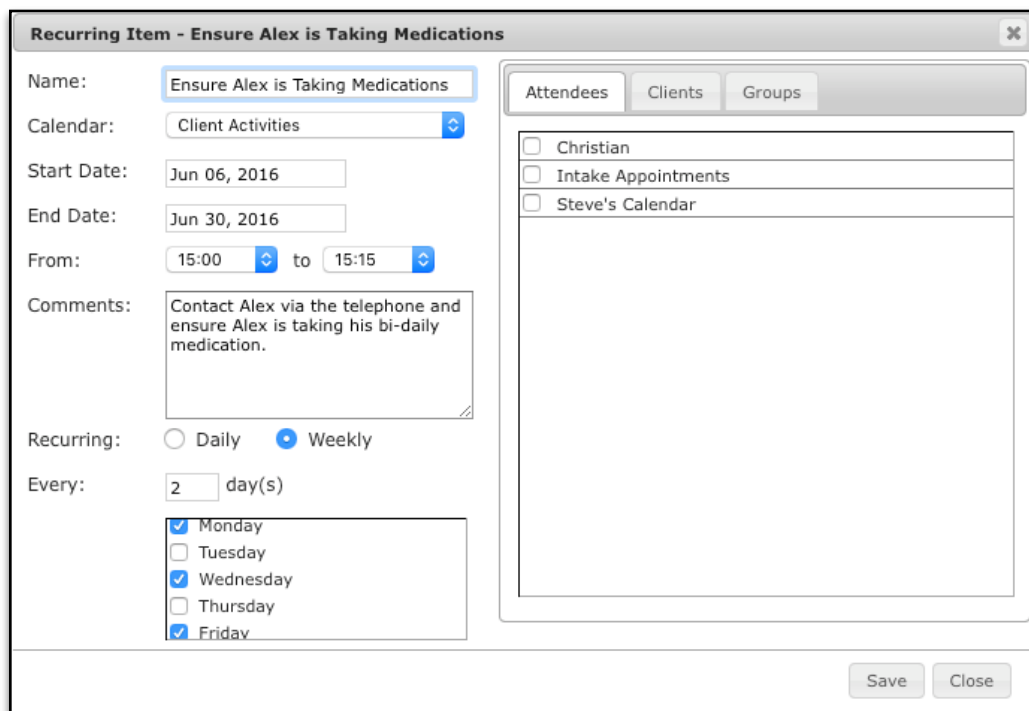


Figure 460 - Modifying Previously Saved Recurring Item Pattern

6. When satisfied with the changes, click **Save** to finalize the process.

Deleting Scheduled Item

1. If a scheduled item has been accidentally entered, or it is no longer required, a user can completely delete it.
2. Refer to page 183 above for how to access the Scheduler module.
3. Locate the desired scheduled item which will be deleted.
4. **Click** on the item to bring up the “Entity Actions” menu as shown in Figure 461.
5. Click on **Delete Scheduled Item**.

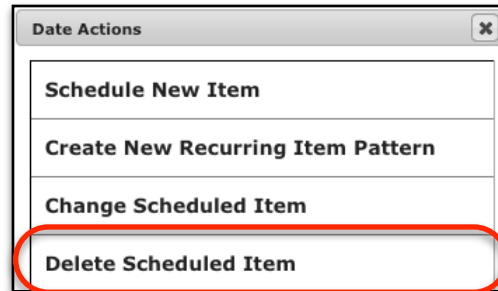


Figure 461 - Deleting Scheduled Item

6. The scheduled item will then be deleted from the Scheduler.

Deleting Recurring Item Pattern

1. If a scheduled item has been accidentally entered, or it is no longer required, a user can completely delete it.
2. Refer to page 183 above for how to access the Scheduler module.
3. Locate the desired scheduled item which will be deleted.
4. **Click** on the item to bring up the “Entity Actions” menu as shown in Figure 462.
5. Click on **Delete Recurring Item Pattern**.

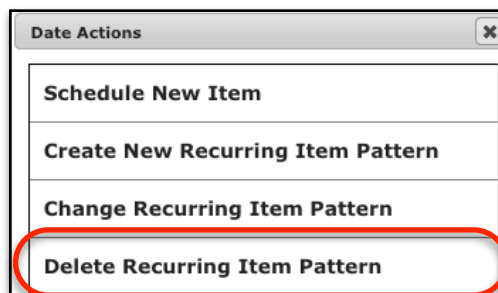


Figure 462 - Deleting Recurring Item Pattern

6. All of the recurring items will then be deleted from the Scheduler.

Working with the Scheduler

1. Once calendars have been created and items have been added to the Scheduler, users can now begin to utilize the Scheduler.
2. Refer to page 183 above for how to access the Scheduler module.
3. Locate the desired item in the Scheduler which is to be worked on.
4. Click on the item to bring up the “Entity Actions” menu as shown in Figure 463.
5. This time, click on **Attached Items** as outlined in Figure 463 below.

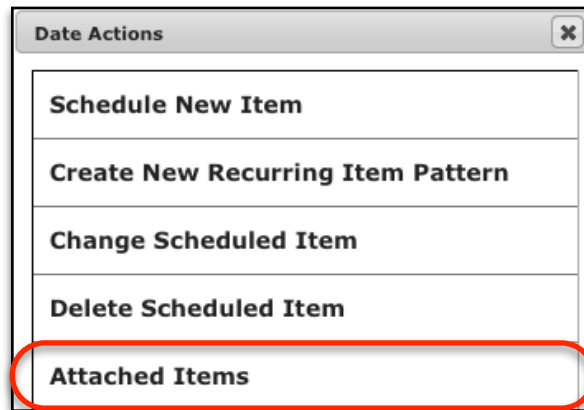


Figure 463 - Attached Items

6. Depending on how the Scheduled Item was initially configured, the software might present the user with a few choices.
7. As can be seen in Figure 464 below, a user has scheduled an item which contained a client, and a group.

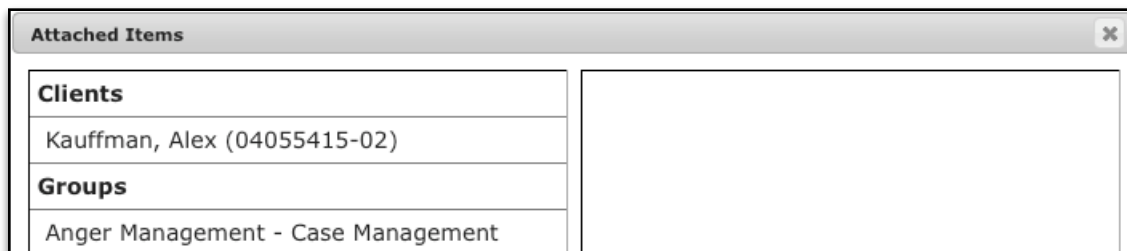


Figure 464 - Reviewing Attached Items

8. Click on either the client or the group. Both offer their own unique set of choices for the user to allow them to rapidly complete their desired work.
9. As can be seen in Figure 465 (see following page), a user has clicked on the client “Kauffman, Alex” (identified by the blue highlight).
10. Notice on the right, all the commonly used shortcuts associated with a client.

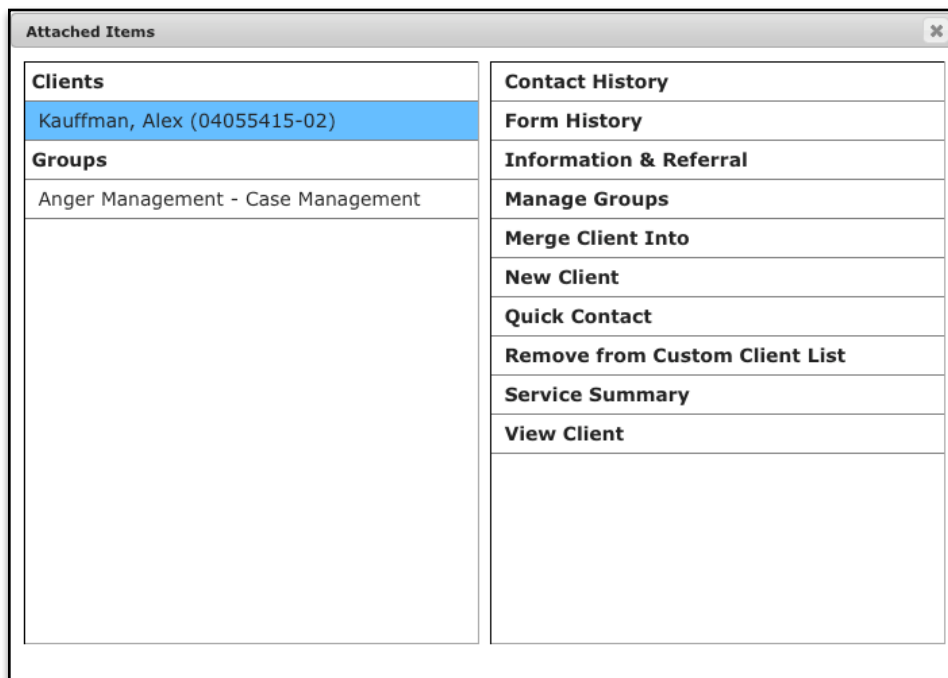


Figure 465 - Attached Items - Client Point of View

11. Refer to each of the respective sections of the manual for how to utilize the modules found in the “Attached Items” Client Point of View.
12. Alternatively, Figure 466 demonstrates the “Attached Items” “Groups Point of View”.

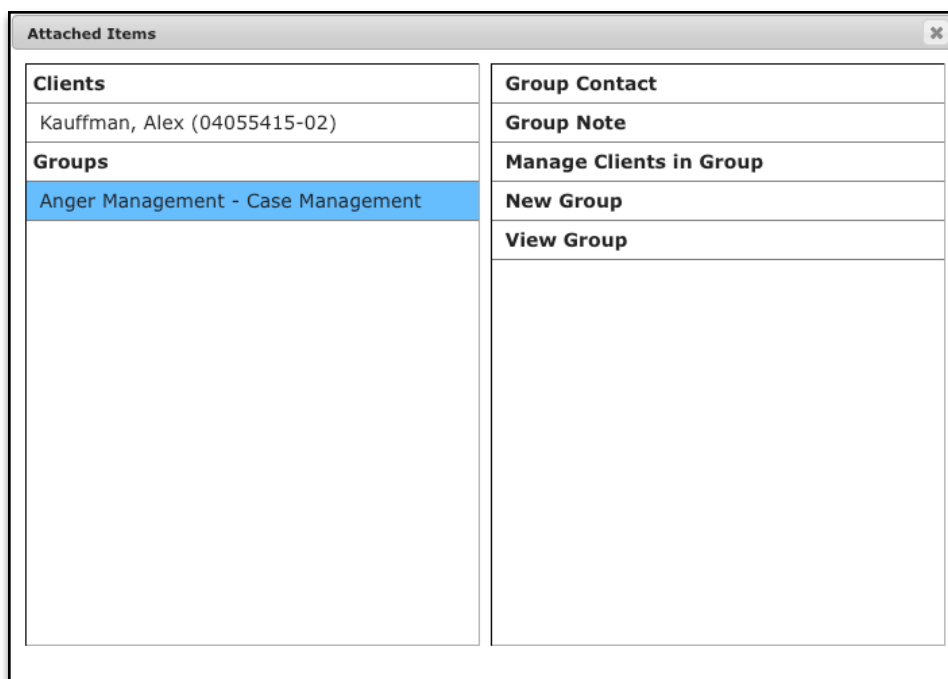


Figure 466 - Attached Items - Group Point of View

Report Suite

The Report Suite allows users and CRMS Administrators the ability to pull data from the CRMS system. Pre-configured reports exist for common tasks. Agencies can also request custom reports if necessary.



Having access to the “Report Suite” does not mean the user can run any reports. Users must also be assigned access to the particular report.

1. In order to run a report, first login to CRMS Web by following the instructions on page 14.
2. Click on the **View** menu —> **Report Suite** as identified in Figure 467.

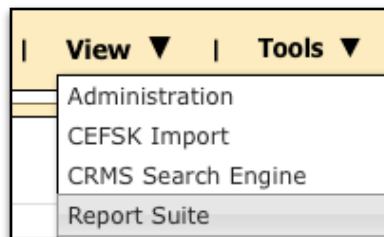


Figure 467 - Accessing Report Suite

3. The Report Suite module will then appear on screen as demonstrated in Figure 468.

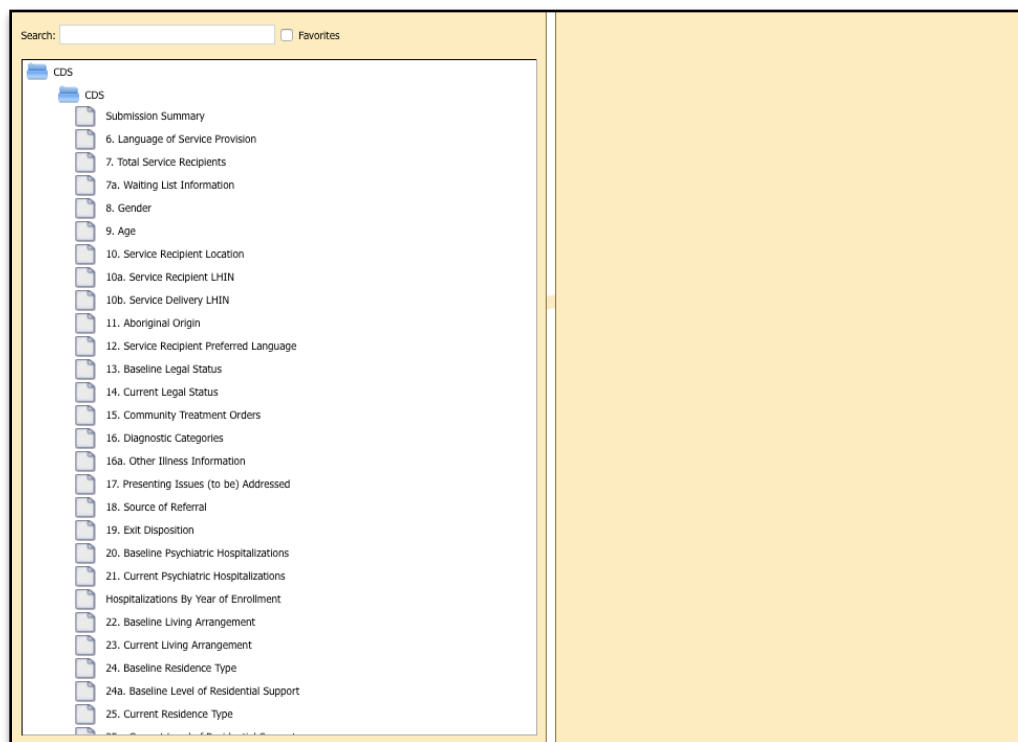


Figure 468 - Report Suite Module

4. A user can “collapse” the Report Suite tabs in order to more efficiently locate a desired report.
5. Click on the ‘blue’ icon identified in Figure 469 below to collapse that section.

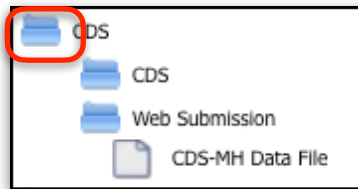


Figure 469 - Collapsing Report Suite Tabs

6. Figure 470 demonstrates all the tabs in the Report Suite in their expanded and collapsed state.

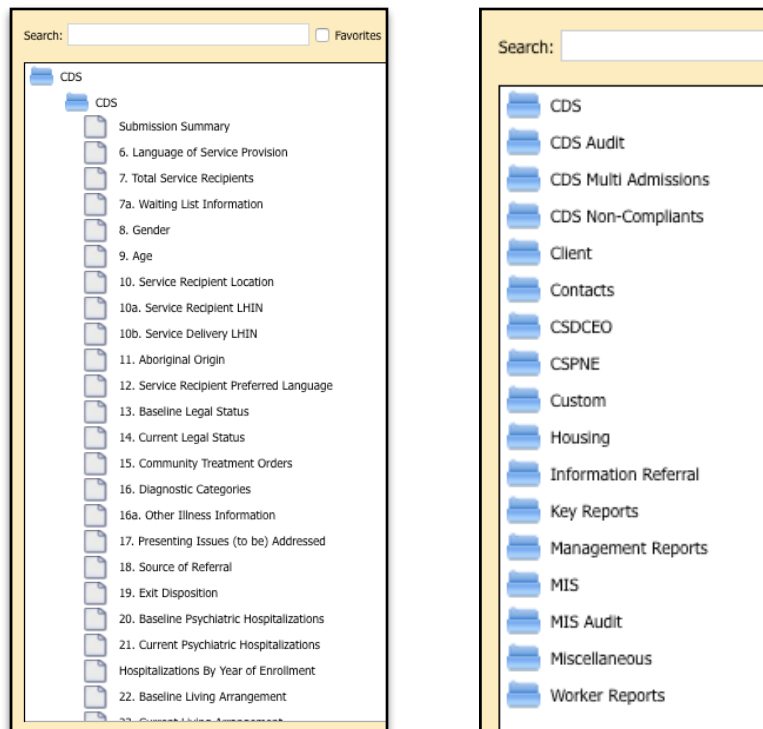


Figure 470 - Report Suite Tabs “Expanded” and “Collapsed”

Searching for a Report

1. The easiest way to locate a desired report, is using the search box.
2. Input the desired search criteria into the search box as seen in Figure 471.



Figure 471 - Searching for a Report

3. The Report Suite will then automatically refresh once the user has stopped typing. This is demonstrated in Figure 472 below.

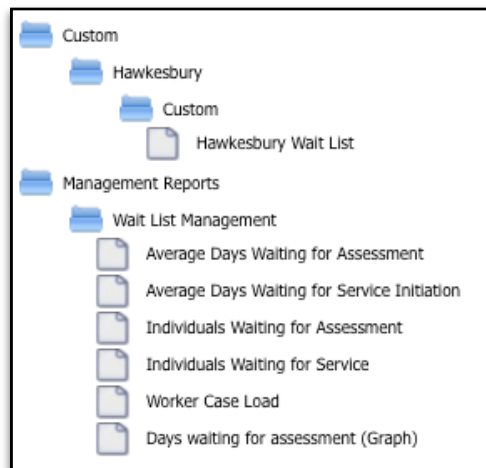


Figure 472 - Searching Results After Searching for a Report

Viewing Favorites

1. Users can quickly review their favourite reports in order to more quickly and efficiently locate their desired report.
2. Check off the **Favorites** check mark as seen in Figure 473.

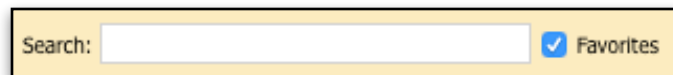


Figure 473 - Viewing Favorite Reports

3. The Report Suite will then automatically refresh and the users' favorite reports will then appear on screen as shown in Figure 474.

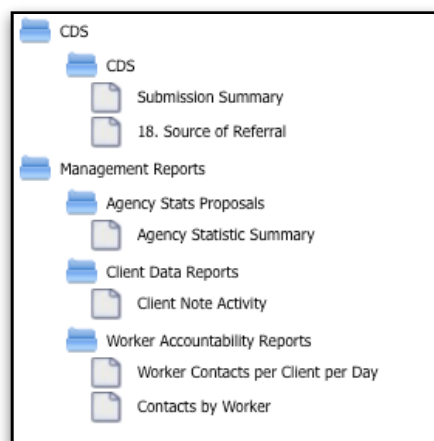


Figure 474 - Viewing Favorite Reports

Adding Reports to Favourites



*****UNDER CONSTRUCTION***** - This section is under construction.
Please contact CRMS Support to determine if an update is available.

Running a Report

1. Upon having located a desired report, **click** on it to bring up the **Report Parameters**
2. In Figure 475 below, a user has selected a CDS Unique Individual Report —> Wait List Information.
3. The Report Parameters are identified by the red border in Figure 475.

Figure 475 - Running a Report

4. Input the desired parameters for the report. In Figure 476, a user is running the report between April 1, 2015 and March 31, 2016 for the Mental Health Case Management functional centre.

Figure 476 - Inputting Report Parameters

- When satisfied with the Report Parameters, click on **PDF** as demonstrated in Figure 477.

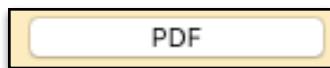
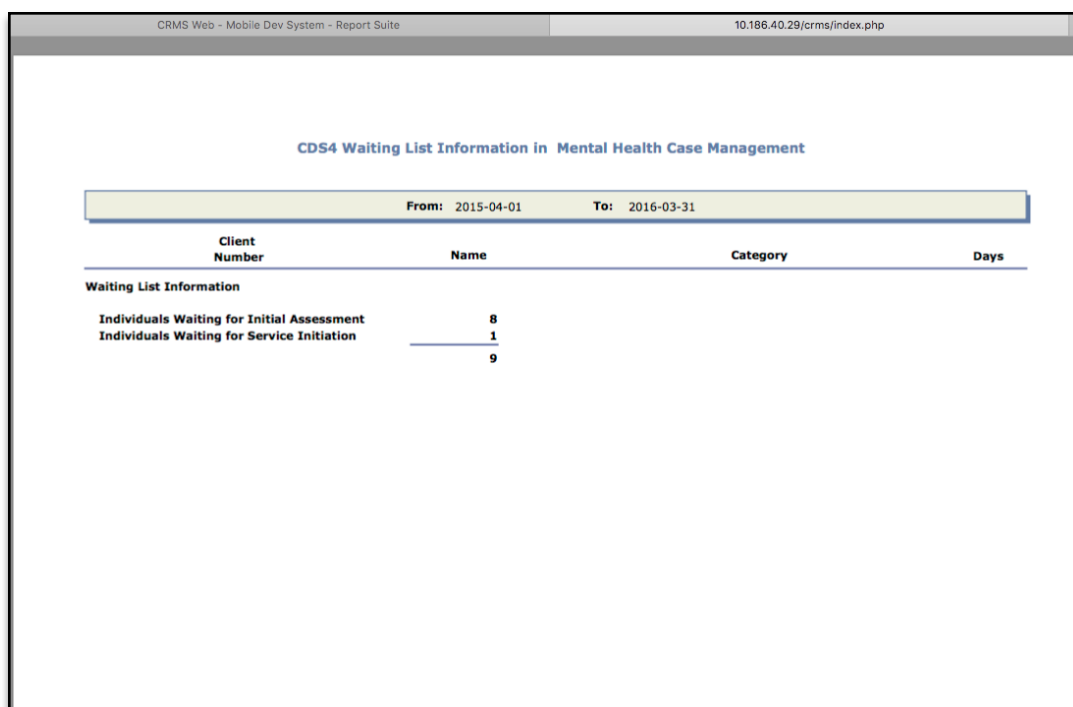


Figure 477 - Running Report in PDF Format

- The Print Preview will then appear on screen in a PDF format as shown in Figure 478.



Client Number	Name	Category	Days
Waiting List Information			
Individuals Waiting for Initial Assessment			8
Individuals Waiting for Service Initiation			1
			9

Figure 478 - Successfully Generated a Report

- Alternatively, should the user have the necessary access rights, they can also ask for the **Raw Data**.
- Click on **Raw Data** as seen in Figure 479.



Figure 479 - Running Report in Raw Data Format

- The report will then be generated however in a raw data format versus a PDF.
- This is demonstrated on the following page in Figure 480.

Show 10 entries		Search:								
Report	ClientNumberPre	ClientsClientID	LastName	FirstName	Status	BirthDate	Age	Sex	County	Race
Waiting List Information	00000109	9	Snow	Arthur	Active	1965-06-19	50	M		
Waiting List Information	04050161	74	Marley	Bob	Active	1968-05-28	47	M	Wellington	Aboriginal
Waiting List Information	04050168	93527	Tanguay	Billy	Active	1956-05-28	59	M	Stormont Dundas	Non-aborigin
Waiting List Information	04050515	93786	Fuentes	Maricar	Active	2001-10-21	14	M		
Waiting List Information	04050007	93806	Tudesky	Tommy	Active	1987-07-09	28	M		
Waiting List Information	04050013	93812	Barker	Bob	Active	1933-04-30	82	M		Non-aborigin
Waiting List Information	04050016	93815	Brady	Frank	Active	1987-05-23	28	M		
Waiting List Information	04050012	109895	Brady	Tom	Not Active	1978-05-23	37	M	Frontenac	
Waiting List Information	04050434	93705	McLennan	Jaelyn	Active	2003-06-21	12			
Showing 1 to 9 of 9 entries									FirstPreviousNextLast	

Figure 480 - Successfully Generated Report in Raw Data Format



TIPS AND TRICKS - Various reports offer different parameters. These are pre-configured by CRMS. By selecting a different report, the user might be presented with different parameters. See Figure 482 below.

11. When selecting a different style of report, the parameters might change.
12. In Figure 481 a user has selected a CDS Audit —> Unique Individual —> Wait List Information report.

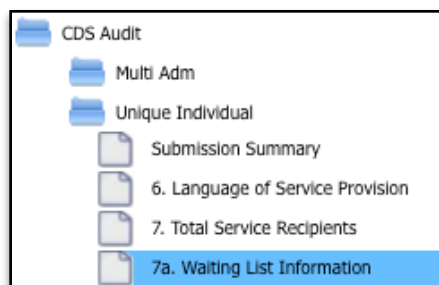


Figure 481 - Running a CDS Audit Report

13. Note in Figure 482 below, the parameters offered are different than earlier.

Program:		v
Program Type:		v
Between:	Apr 01, 2015	and Mar 31, 2016
Agency:		v

Figure 482 - Different Report Parameters Based on Selected Report

Mobile Access

The CRMS v3 system has been designed to be accessible on any platform or device. This allows users to login remotely using their tablet, computer or phone. This section will outline the differences of the CRMS v3 system when logging into the software using a mobile device.

1. In this example, a user is utilizing an iPad to access the CRMS v3 system.
2. Open your favorite web browser on your device - in this example, the user is utilizing Safari.



Figure 483 - Accessing CRMS Web via iPad

3. Upon launching the web browser, enter the CRMS IP or web address which your IT has provided to you.
4. As can be seen in Figure 484 below, a user is navigating to : "crms-support.com/crms".



Figure 484 - Entering CRMS Web Address

5. The user will then be presented with the CRMS Web login screen. Note in Figure 485 below that the login screen has been resized to work more efficiently with a tablet.



Figure 485 - CRMS Web Login Screen on an iPad

6. Enter the login credentials provided to you by your CRMS Administrator and click **Login**.

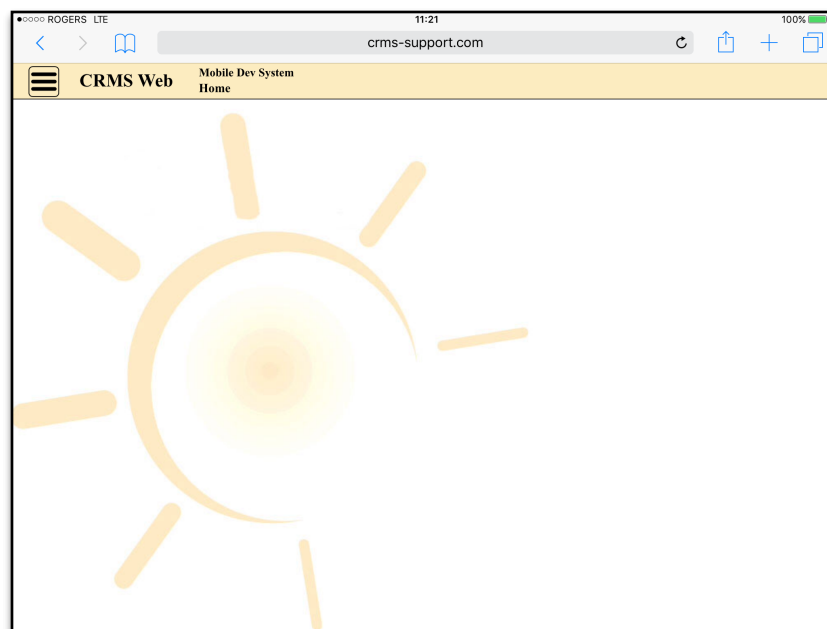


Figure 486 - Successfully Logged Into CRMS Web Using an iPad

7. Note in Figure 487 below, the “hamburger icon” has now replaced the “View” menu.
8. As the user is navigating CRMS Web using a mobile device, the software automatically adjusts itself to best suit the device.



Figure 487 - CRMS Web “Hamburger Icon”

9. Clicking on the “hamburger icon” provides the user with the list of available modules. This is demonstrated below in Figure 488.

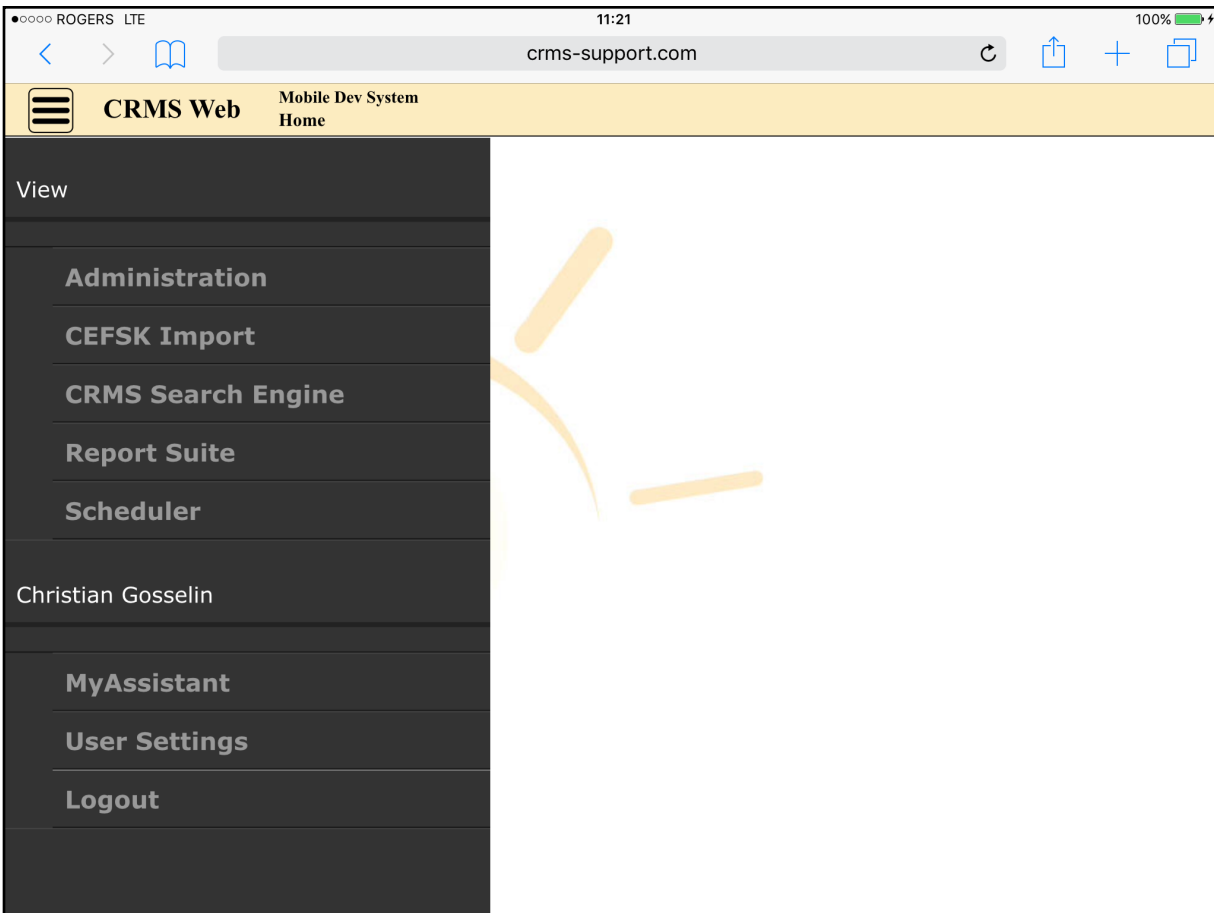


Figure 488 - CRMS Web Mobile “View” Menu

10. Click on the desired module to continue working with the software.
11. Figure 489 (see following page) demonstrates the CRMS Search Engine on an iPad.

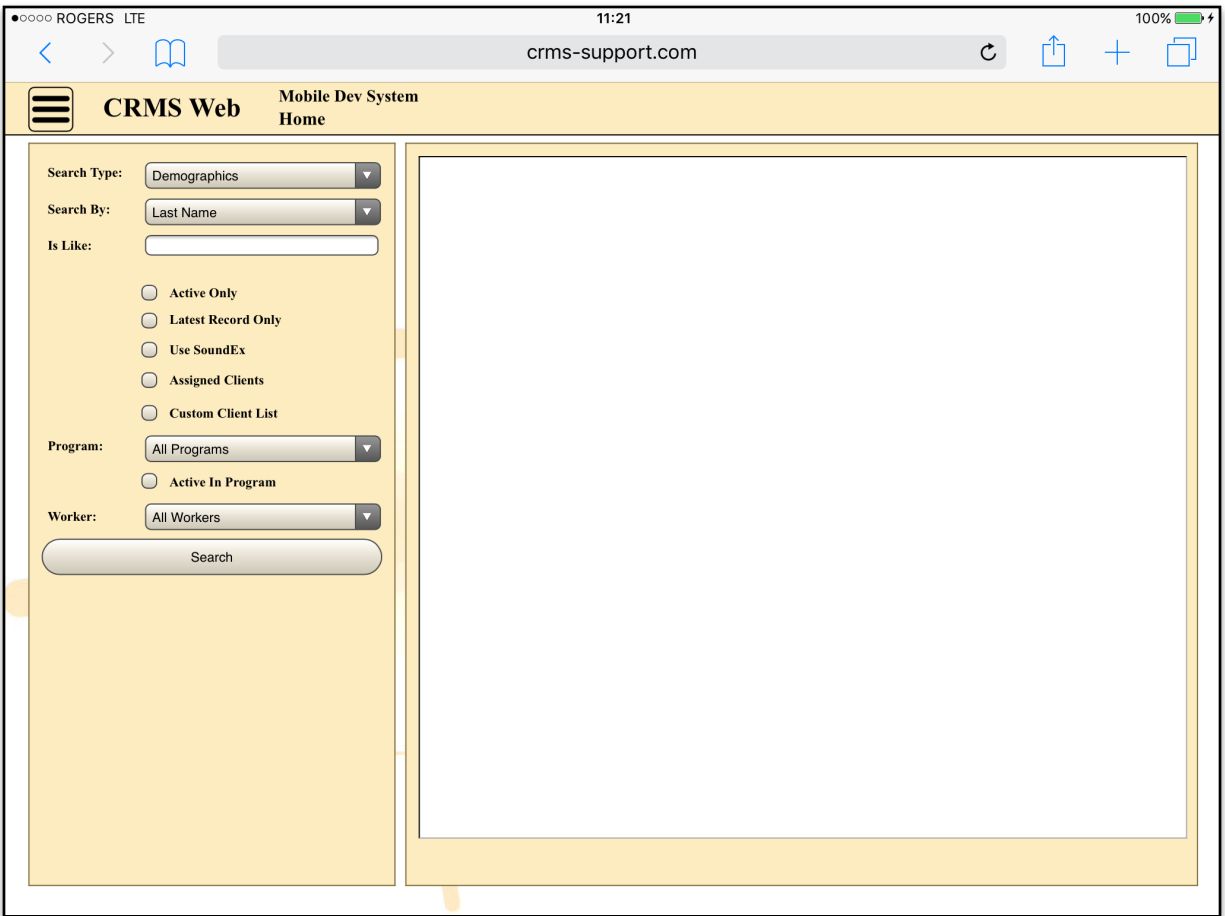


Figure 489 - CRMS Search Engine Using an iPad

12. Refer to the individual sections of the manual for how to utilize each respective module.

Administration Module

The Administration module allows users to administrate and modify all aspects of the CRMS Software.



Only properly trained CRMS Administrators should have access to the full Administration module. Irreversible damage can occur otherwise.

1. Refer to page 14 above for how to login to the CRMS Web system.
2. Once logged into the software, click the View menu and select **Administration** as seen in Figure 490.

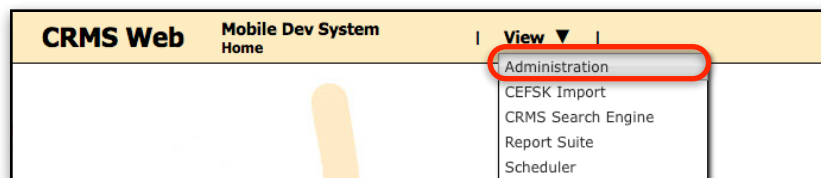


Figure 490 - Accessing Administration Module

3. The Administration module will then appear on screen as illustrated below in Figure 491.
4. From the list of available Administration modules, select the desired module. The respective modules will be described in their individual sections below.

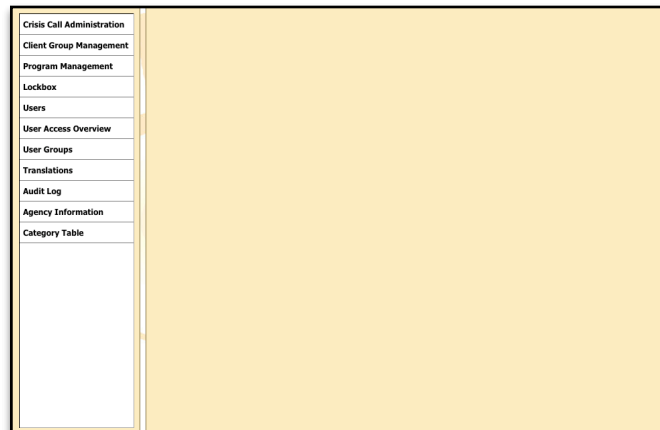


Figure 491 - Administration Module



****TIPS AND TRICKS* - An Administrator might not have access to all the modules listed in Figure 491. These are all individual access rights.***

Crisis Call Administration

The Crisis Call Administration module allows the CRMS Administrator to link a crisis client with a CRMS client, merge two crisis clients, link calls, and create crisis clients without the associated phone call.

1. Refer to page 217 for how to access the Administration module.
2. Click on **Crisis Call Administration** as seen in Figure 492 below.



Figure 492 - Crisis Call Administration

3. The Crisis Call Administration module will then appear on screen as is reflected in Figure 493.

Link Clients	Merge Crisis Clients	Link Call	Create Crisis Clients	
Crisis Clients				
Last Name:		Crisis Client ID:		
First Name:		Search Crisis Clients		
Last Name	First Name	Birth Date	Crisis Client ID	Linked CRMS Client
CRMS Clients				
Last Name:		CRMS Client #:		
First Name:		Search CRMS Clients		
Last Name	First Name	Birth Date	Client Number	
Link Clients				

Figure 493 - Crisis Call Administration

Link Clients

1. To link a “crisis” client with a “registered” CRMS client, access the Crisis Call Administration as described above on page 217.
2. Click on the **Link Clients** tab as illustrated in Figure 494.

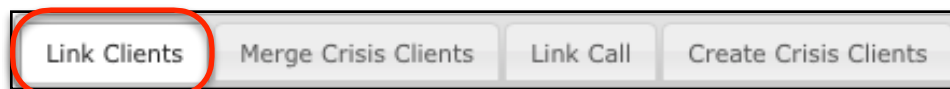


Figure 494 - Accessing Link Clients Tab

3. In the “Crisis” client search section, enter the desired parameters. In Figure 495, a user is searching for a “crisis” client with the last name of “barker”.

Crisis Clients				
Last Name:	barker	Crisis Client ID:		
First Name:		Search Crisis Clients		
Last Name	First Name	Birth Date	Crisis Client ID	Linked CRMS Client
Barker	Bob	1943-02-23	0000000001	

Figure 495 - Searching for a “Crisis” Client

4. In the “CRMS” clients search section, enter the desired parameters. In Figure 496, a user is also searching for a “CRMS” client with the last name of “barker”.

CRMS Clients			
Last Name:	barker	CRMS Client #:	
First Name:		Search CRMS Clients	
Last Name	First Name	Birth Date	Client Number
Barker	Bob	1933-04-30	04050013

Figure 496 - Searching for a “CRMS” Client

5. Once satisfied with both search parameters and the correct clients have been located, **click** on both clients to select them for the “linking process”.
6. In Figure 497 (see following page), a user has highlighted both clients. These can be identified by the blue highlight.

Link Clients
Merge Crisis Clients
Link Call
Create Crisis Clients

Crisis Clients
Last Name: Crisis Client ID:
First Name:

Last Name	First Name	Birth Date	Crisis Client ID	Linked CRMS Client
Barker	Bob	1943-02-23	0000000001	

CRMS Clients
Last Name: CRMS Client #:
First Name:

Last Name	First Name	Birth Date	Client Number
Barker	Bob	1933-04-30	04050013

Link Clients

Figure 497 - Selecting Both Clients Whom Will be Linked Together

- Once satisfied with the client selection in both sections, click **Link Clients** as shown below.



Figure 498 - Linking Clients

- A user will be presented with a confirmation dialog allowing them to cancel if desired. This is shown in Figure 499.

Do you want to link Crisis Client ID 1 to CRMS Client 04050013?

Figure 499 - Confirming the Linking Process

9. Click Cancel if something is incorrect and modifications must be made to the linking process.
10. If the details are satisfactory, click **Ok** to continue the process.
11. Another confirmation dialog will appear, this time advising the user exactly what will be linked should they finalize the process.
12. As can be seen in Figure 500, 9 calls associated to this “crisis” client will be merged into the CRMS client file.

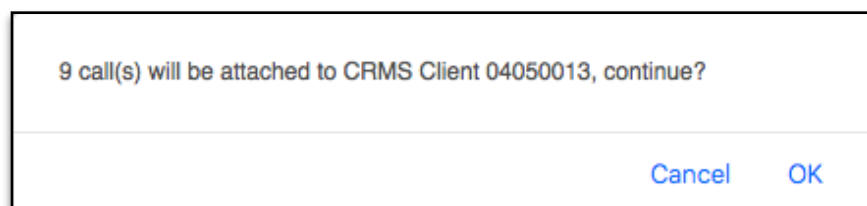


Figure 500 - Confirming the Data Which Will be Linked

13. If satisfied with the linking details, click **Ok** to finalize the process.
14. A message box will appear confirming the process was indeed successful.
15. This is reflected in Figure 501 below.

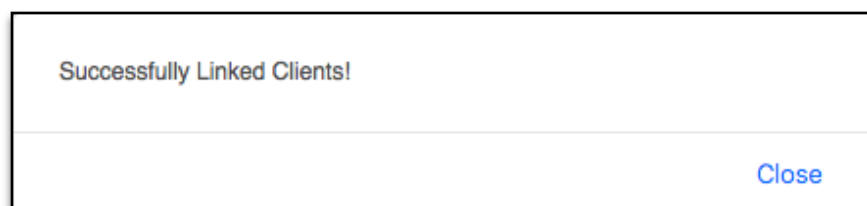


Figure 501 - Successfully Linked Clients

16. The “Link Clients” tab will then automatically refresh.

Merging Crisis Clients

Should a user have accidentally created a duplicate “crisis” client, the CRMS Administrator can merge them together to clean up the “crisis” client files.

1. Access the Crisis Call Administration module as described above on page 218.
2. Click on the **Merge Clients** tab as identified in Figure 502.

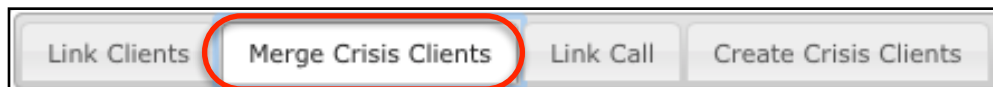


Figure 502 - Merge Crisis Clients

3. The **Merge Crisis Clients** tab will then appear on screen.

Link Clients Merge Crisis Clients Link Call Create Crisis Clients

Crisis Clients (Client that Clients will merge into)

Last Name: Crisis Client ID:

First Name:

Last Name	First Name	Birth Date	Crisis Client ID	Linked CRMS Client

Crisis Clients (Client that will be removed)

Last Name: Crisis Client ID:

First Name:

Last Name	First Name	Birth Date	Crisis Client ID	Linked CRMS Client

Figure 503 - Merge Crisis Clients Tab

4. In the “**Crisis Clients (client that will be merge into)**” section locate the file which will remain in the software.
5. In Figure 504, a user is searching for a client with the last name of “jones”.

Crisis Clients (Client that Clients will merge into)

Last Name: Crisis Client ID:

First Name:

Last Name	First Name	Birth Date	Crisis Client ID	Linked CRMS Client
Jones	Bob		0000000004	
Jones	Bobby		0000000025	

Figure 504 - Searching for Crisis Client Which Will Remain in the Software

6. In the “Crisis Clients (clients that will be removed)” section locate the file which will be **removed** from the software.

7. In Figure 505, a user is searching for a client with the last name of “jones”.

Crisis Clients (Client that will be removed)
Last Name: **Crisis Client ID:**
First Name:

Last Name	First Name	Birth Date	Crisis Client ID	Linked CRMS Client
Jones	Bob		0000000004	
Jones	Bobby		0000000025	

Figure 505 - Searching for Crisis Client Which Will be Removed from the Software

8. Once satisfied with the search criteria, click on the desired clients in the respective sections.
9. In Figure 506 below, a user has selected their desired clients. This can be identified by the blue highlight.

Crisis Clients (Client that Clients will merge into)
Last Name: **Crisis Client ID:**
First Name:

Last Name	First Name	Birth Date	Crisis Client ID	Linked CRMS Client
Jones	Bob		0000000004	
Jones	Bobby		0000000025	

Crisis Clients (Client that will be removed)
Last Name: **Crisis Client ID:**
First Name:

Last Name	First Name	Birth Date	Crisis Client ID	Linked CRMS Client
Jones	Bob		0000000004	
Jones	Bobby		0000000025	

Figure 506 - Selected Both “Crisis” Clients Whom Will be Merged Together

10. When satisfied with the client selections, click **Merge Clients** as shown in Figure 507.



Figure 507 - Merge Crisis Clients



*****UNDER CONSTRUCTION***** - This section is under construction. Please contact CRMS Support to determine if an update is available.

Link Call

The Link Call tab allows CRMS Administrators to link a “crisis call” with an existing “crisis client” or a “CRMS client”.

1. Access the Crisis Call Administration area as described above on page 218.
2. Click on the **Link Call** tab as shown in Figure 508.

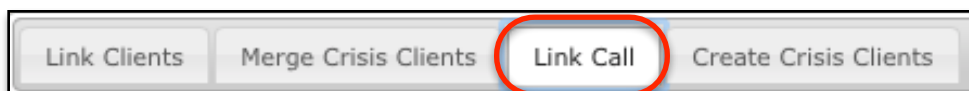


Figure 508 - Link Call Tab

3. The Link Call tab will then appear on screen.

Call ID	Call Date	Start Time	End Time	Client Name	Client ID

Client ID	First Name	Last Name

Link Call to Client

Figure 509 - Link Call Tab

4. In the **Crisis Call** section, perform a search for the desired crisis call.
5. In Figure 510, a user has performed a wildcard search (simply by clicking “Search” and leaving the parameters blank).

Crisis Call					
Search By: Call ID  for Search					
Call ID	Call Date	Start Time	End Time	Client Name	Client ID
153	2016-01-22	14:00	14:50	Barker, Bob	CRMS-04050013
152	2015-12-14	09:45	10:05	Wohlberg, Kaily	CRMS-04050519
151	2015-07-10	10:17	10:19	Allen, Ethan	CRMS-04050143
150	2015-07-10	10:04	10:13	Duck, Donald	CRMS-04050018

Figure 510 - Searching for a Crisis Call

6. In the **Client Search** section, perform a search for the desired client.
7. In Figure 511, a user has performed a search for a “CRMS” client with the last name of “barker”.

Client Search		
☐ Crisis Client ☒ CRMS Client		
Search By: Last Name  for barker Search		
Client ID	First Name	Last Name
04050013	Bob	Barker

Figure 511 - Searching for Client to Link to Crisis Call

8. Once satisfied with both search criteria, click on the desired call to select it.
9. Then click on the desired client to select it.
10. Figure 512 (see following page) illustrates the Link Call tab upon selecting both the call and the client.

Link Clients
Merge Crisis Clients
Link Call
Create Crisis Clients

Crisis Call

Search By:
Call ID
for
Search

Call ID	Call Date	Start Time	End Time	Client Name	Client ID
153	2016-01-22	14:00	14:50	Barker, Bob	CRMS-04050013
152	2015-12-14	09:45	10:05	Wohlberg, Kaily	CRMS-04050519
151	2015-07-10	10:17	10:19	Allen, Ethan	CRMS-04050143
150	2015-07-10	10:04	10:13	Duck, Donald	CRMS-04050018

Client Search

☐ Crisis Client
☒ CRMS Client

Search By:
Last Name
for
barker
Search

Client ID	First Name	Last Name
04050013	Bob	Barker

Link Call to Client

Figure 512 - Selected Crisis Call and Client File to Link Together

11. When satisfied with both selections, click **Link Call to Client** as seen below.

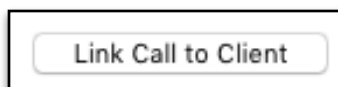


Figure 513 - Link Call to Client



*****UNDER CONSTRUCTION***** - This section is under construction. Please contact CRMS Support to determine if an update is available.

Create Crisis Clients

If necessary, a CRMS Administrator can create a “crisis client” file without the associated phone call. This can be useful in certain instances.

1. Access the Crisis Call Administration module as described on page 218 above.
2. Click on **Create Crisis Clients** tab as demonstrated in Figure 514.

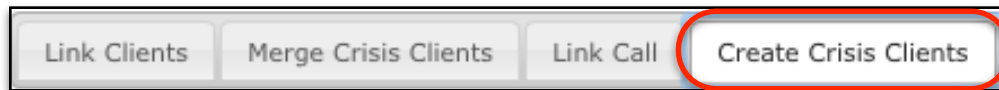


Figure 514 - Create Crisis Clients Tab

3. The Create Crisis Clients tab will then appear on screen.

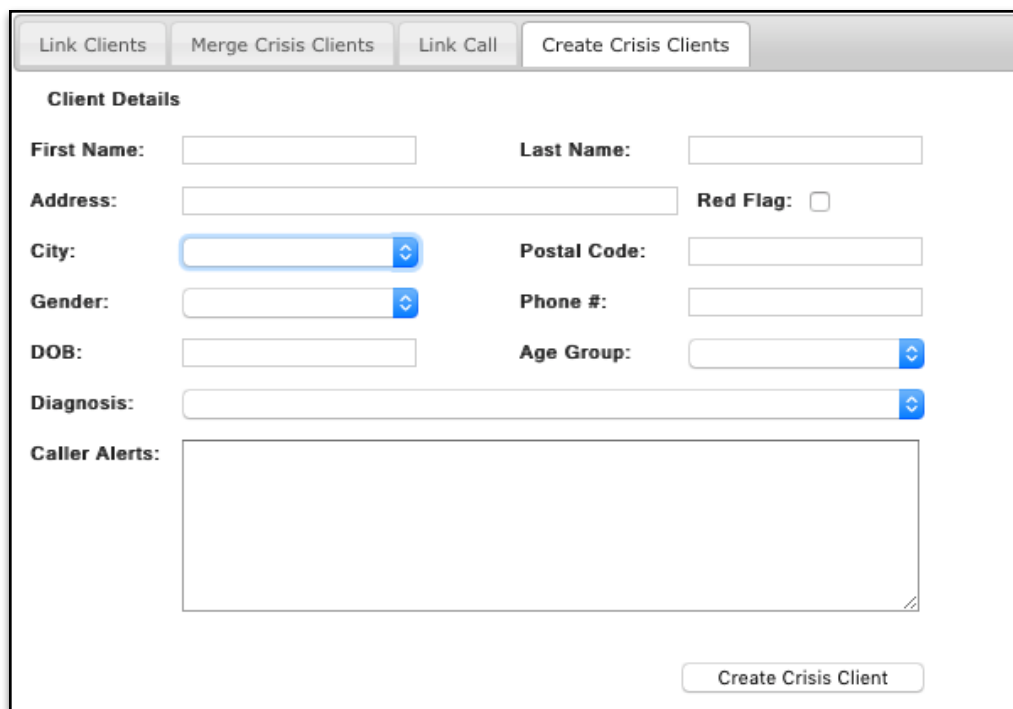


Figure 515 - Create Crisis Clients Tab

4. Fill out the necessary information, and when satisfied, click on **Create Crisis Client** as shown below in Figure 516.



Figure 516 - Create Crisis Client

5. A message box will appear confirming the process was indeed successful.

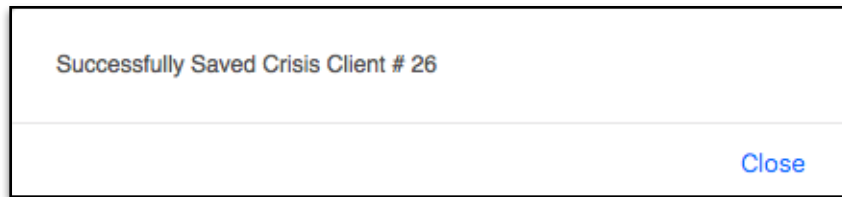


Figure 517 - Successfully Created Crisis Client

6. The newly created crisis client can now be utilized in the Crisis Call Module, or the Crisis Call Administration module.

Client Group Management

The Client Group Management allows CRMS Administrators the ability to create “groups” of clients which will be in turn used with the CRMS “Groups” module. Refer to page 84 for how to access the “Groups” module. The instructions below will solely cover the **Client Group Management** module.

1. Click on **Client Group Management** and the module will then appear on screen as demonstrated in Figure 518.

The screenshot shows the 'Client Group Management' interface. On the left is a sidebar with a menu containing: Crisis Call Administration, Client Group Management (highlighted), Program Management, Lockbox, Users, User Access Overview, User Groups, Translations, Audit Log, Agency Information, and Category Table. The main area is divided into two sections. The top section is a table with a 'Name' header, listing various groups: Activities, Agency Tours, Anger Management, Anger Management - School B, Anxiety, Bowling Group, CMHA Calgary Group, CMHA Hamilton Training Group, CMHA Training 2, CMHA Training Group, CMHA York Training 2, Community Kitchen, CRMS Group AD, CRMS Group CM, CRMS v2 Pilot Group, and Daily Living. Below the table are buttons for 'Duplicate' and 'Show All'. The bottom section is a form for creating or editing a group, with fields for 'Group Name', 'Group Type', 'Program', 'Active' (checkbox), and 'Worker'. The 'New' button is visible next to the 'Group Name' field, and the 'Save' button is next to the 'Group Type' field.

Figure 518 - Client Group Management

2. To modify an existing group, click on the group from amongst the list available on the left hand side.
3. To create a new group, continue reading the instructions below.
4. Click **New** to ensure the Client Group Management module is in the ‘new’ mode.
5. Figure 519 below demonstrates a user in the process of creating a new group.
6. Fill out the necessary parameters and click **Save** when satisfied to finalize the process.

The screenshot shows the 'New' group creation form. The fields are filled with: 'Group Name: Lawn Bowling', 'Group Type: Psychogeriatric Group', 'Program: Case Management', 'Active' (checked checkbox), and 'Worker: Christian Gosselin'. The 'New' button is next to the 'Group Name' field, and the 'Save' button is next to the 'Group Type' field.

Figure 519 - Creating a New ‘Group’ Using Client Group Management

7. A message box will appear confirming the process was indeed successful.

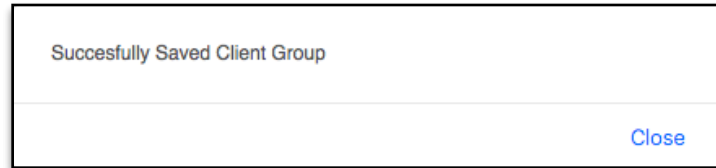


Figure 520 - Successfully Saved Client Group

8. The Groups List will automatically refresh and the newly saved group will appear once refreshed. This is demonstrated in Figure 521 below.



Figure 521 - Reviewing Successfully Created Client Group

9. Refer to page 84 for how to add / remove clients to this newly created group, or for how to utilize the group for contacts and case notes.

De-Activating a Client Group

Should a group no longer be needed, a CRMS Administrator can de-activate the group to clear some of the clutter from within the module.

1. Access the **Client Group Management** module as described above.
2. Locate the desired group which will be de-activated and click to select it.
3. Uncheck the **Active** check mark as demonstrated in Figure 522.

A form with a yellow background and a black border. It contains several fields: 'Group Name' with the value 'Lawn Bowling', 'Group Type' with the value 'Psychogeriatric Group', 'Program' with a dropdown menu showing 'Case Management', and 'Worker' with a dropdown menu showing 'Christian Gosselin'. Below the 'Program' field, there is a checkbox labeled 'Active'. This checkbox is currently unchecked and is circled with a red oval.

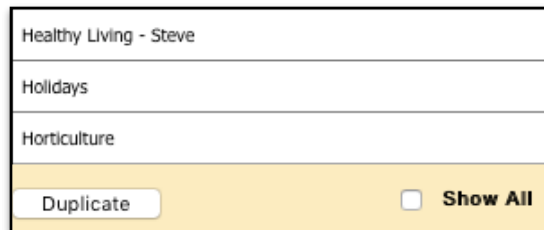
Figure 522 - Deactivating a Client Group

4. Click **Save** to finalize the process.
5. A message box will appear confirming the save was indeed successful.

6. The newly de-activated group will then disappear from the list of available groups.
7. In order to bring the de-activated group back, follow the instructions below.

Re-Activating a Client Group

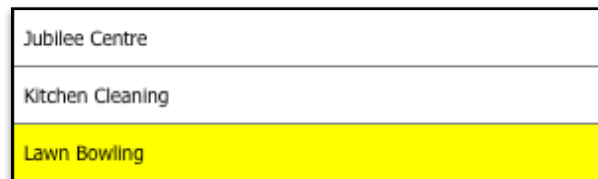
1. Access the **Client Group Management** module as described above.
2. Below the list of available groups, click on the **Show All** check mark as shown below.



Healthy Living - Steve
Holidays
Horticulture
Duplicate ☐ Show All

Figure 523 - Showing All Client Groups

3. De-activated groups will then re-appear, highlighted in a yellow color as shown in Figure 524.



Jubilee Centre
Kitchen Cleaning
Lawn Bowling

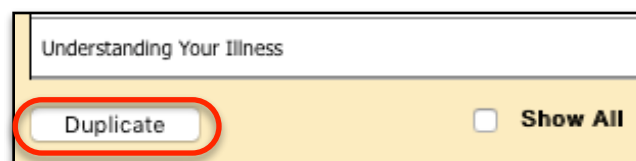
Figure 524 - Reactivating a deactivated Group

4. Click **Save** to finalize the process. The group will then be re-activated and will be available for use in the “Groups” module.

Duplicating a Client Group

As a time saving measure, CRMS Administrators can quickly duplicate a group, including all clients within the group.

1. Access the **Client Group Management** module as described on page 229.
2. Locate the group to be duplicated and **click** to select it.
3. Once the group has been selected, click **Duplicate** as seen in Figure 525.



Understanding Your Illness
Duplicate ☐ Show All

Figure 525 - Duplicating Client Group

4. A message box will appear confirming the duplication was indeed successful as demonstrated in Figure 526.

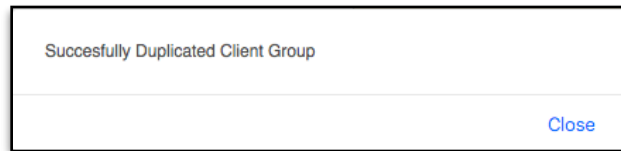


Figure 526 - Successfully Duplicated Client Group

5. The newly duplicated client group will then appear in the “Groups List” as illustrated in Figure 527.



Figure 527 - Reviewing Successfully Duplicated Client Group

6. Click to select the group from the “Groups List” and rename the group if necessary by following the instructions above for how to modify a group.

Program Management

The Program Management section allows CRMS Administrators to setup new services or programs which the agency offers. Or alternatively, a CRMS Administrator can deactivate a program which the agency no longer offers.

1. Refer to page 217 above for how to access the Administration section.
2. Click on **Program Management** to access the Program Management module as seen in Figure 528.



Figure 528 - Program Management Module

3. The **Program Management** module will then appear on screen as shown in Figure 529.

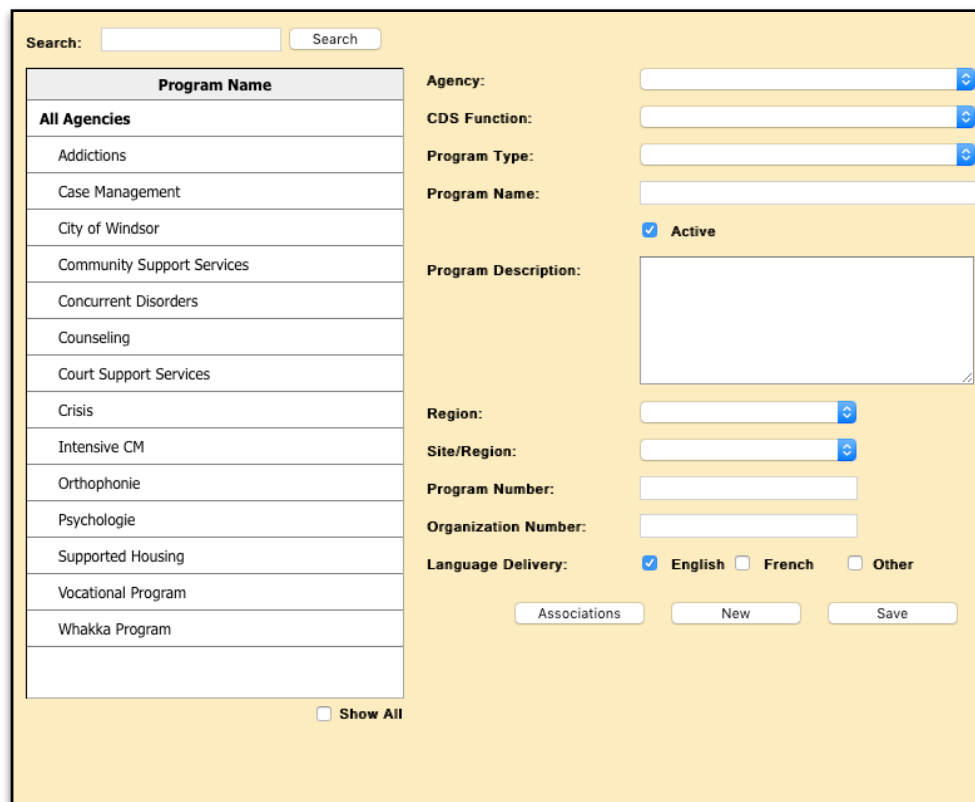
The screenshot shows a web application interface for 'Program Management'. On the left, there is a search bar with the text 'Search:' and a 'Search' button. Below it is a table with the header 'Program Name'. The table lists various programs under the category 'All Agencies': Addictions, Case Management, City of Windsor, Community Support Services, Concurrent Disorders, Counseling, Court Support Services, Crisis, Intensive CM, Orthophonie, Psychologie, Supported Housing, Vocational Program, and Whakka Program. At the bottom of the table is a 'Show All' link. On the right side of the interface, there are several form fields: 'Agency:' (dropdown), 'CDS Function:' (dropdown), 'Program Type:' (dropdown), 'Program Name:' (text input), 'Active' (checked checkbox), 'Program Description:' (text area), 'Region:' (dropdown), 'Site/Region:' (dropdown), 'Program Number:' (text input), 'Organization Number:' (text input), and 'Language Delivery:' (checkboxes for English, French, and Other, with English selected). At the bottom right, there are three buttons: 'Associations', 'New', and 'Save'.

Figure 529 - Program Management Module



****TIPS AND TRICKS* - Program configuration is an extremely important aspect to the CRMS system. CDS/MIS data is aggregated by this module.***

Creating a New Program

1. In order to create a new program, first access the **Program Management** module as described above.
2. Click **New** as identified in Figure 530.

Language Delivery: ☒ English ☐ French ☐ Other

Associations **New** Save

Figure 530 - Creating a New Program

3. The Program Management will then enter 'new' mode.
4. Fill out the necessary fields - pay close to attention to the program configuration. Many aspects of the software are closely tied to this configuration.
5. Figure 531 demonstrates a user in the process of creating a new program.

Agency: All Agencies

CDS Function: Mental Health Case Management

Program Type:

Program Name: Lake House

☒ Active

Program Description:

Region: South East 10

Site/Region:

Program Number: 342

Organization Number: 134

Language Delivery: ☒ English ☐ French ☐ Other

Associations New Save

Figure 531 - Creating a New Program

6. When satisfied with the inputted information, click **Save** to finalize the process.
7. A message box will appear confirming the process was indeed successful.

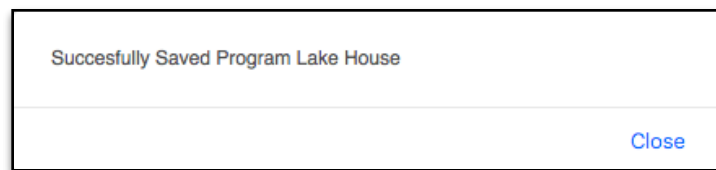


Figure 532 - Successfully Saved New Program

8. The newly created program will then appear in the Program List.

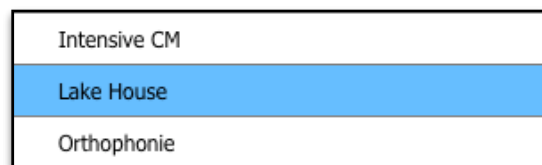


Figure 533 - Reviewing Newly Created Program

De-Activating a Program

To de-activate a program, refer to the section “Program Management” above for how to access the Program Management module.

1. Locate the desired program from the list of available programs.
2. **Click** to select the program.
3. Uncheck the **Active** checkmark as demonstrated in Figure 534.

Figure 534 - Deactivating a Program

4. Once finished, click **Save** to finalize the process. A message box will appear confirming the process was indeed successful.

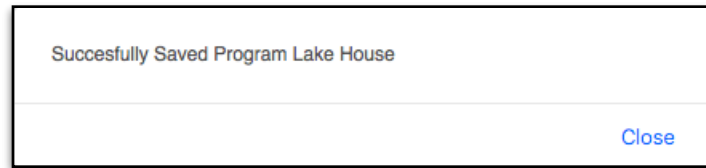


Figure 535 - Successfully Deactivated Program

5. Once the program has been successfully deactivated, it will vanish from the list of 'active' programs.
6. To re-activate the program, follow the instructions below.

Showing All Programs

1. Should a program be flagged as 'inactive', it will vanish from the list of available program choices when a user utilizes the software.
2. An Administrator can always re-activate the program by following the instructions below.
3. Access the **Program Management** module as described above on page 233.
4. Click **Show All** as illustrated in Figure 536.

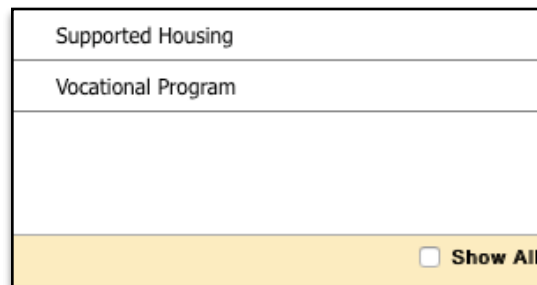


Figure 536 - Showing All Programs

5. The list of programs will refresh and inactive programs will appear highlighted in yellow.

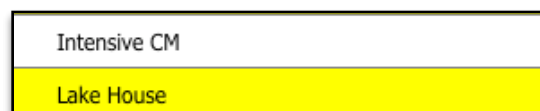


Figure 537 - Selecting an Inactive Program for Reactivation

6. Click to select the now visible 'not active' program.
7. Re-check the **Active** flag as described on page 235.
8. Click **Save** to finalize the process.
9. The program will then appear once again as 'active'.

Configuring Program Associations

CRMS Administrators can also pre-configure a few options for their programs to assist their users during the data collection process. These details are outlined below.

1. Access the **Program Management** module as described on page 233.
2. Locate and **click** on the program which will be configured.
3. Locate the **Associations** button as demonstrated in Figure 538.

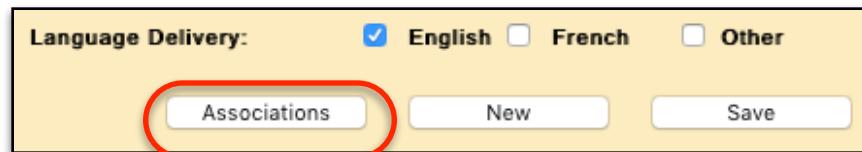


Figure 538 - Program Associations

4. The **Associations** dialog will then appear on screen as shown in Figure 539.

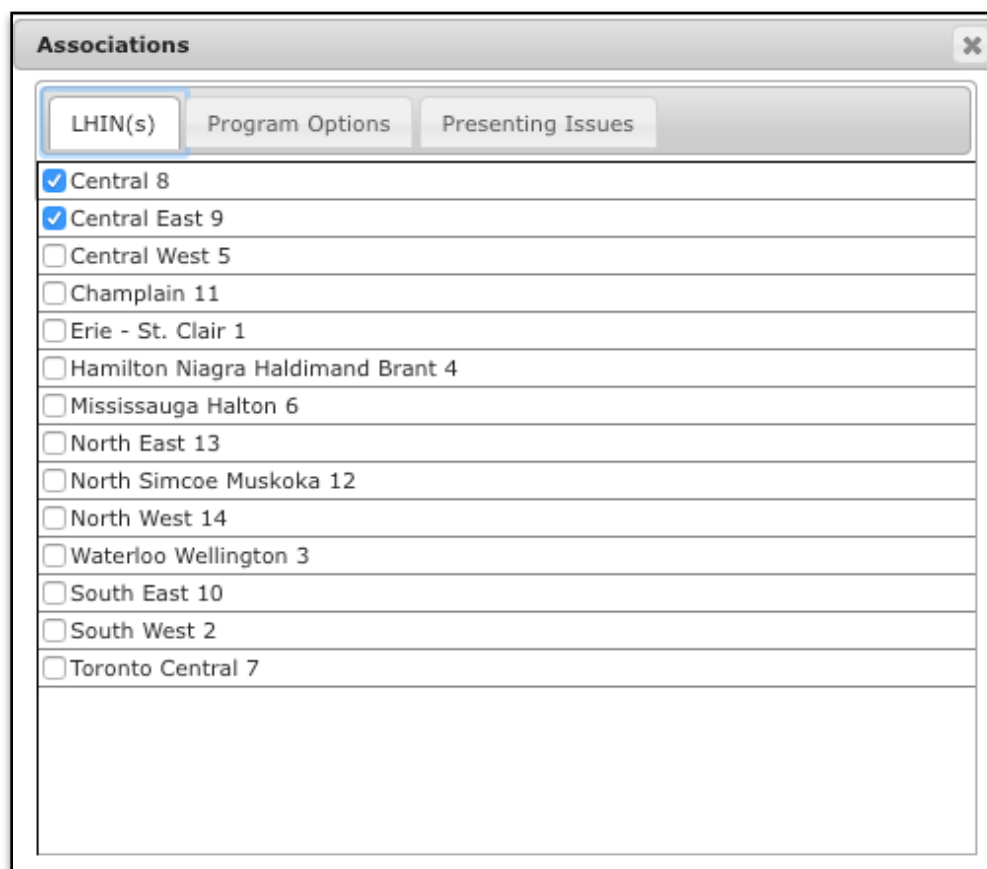
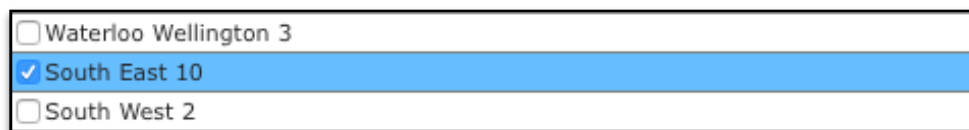


Figure 539 - Program Associations Dialog

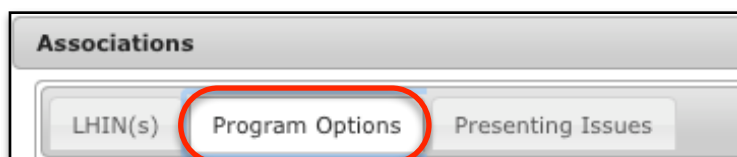
5. The Associations window allows CRMS Administrators to pre-populate LHIN's, program options and pre-populate presenting issues.
6. To pre-populate the LHIN's, check off the desired LHIN's for that program.
7. In Figure 540 below, an Administrator has checked off "South East 10" as the pre-populated LHIN for this program.



☐	Waterloo Wellington 3
☒	South East 10
☐	South West 2

Figure 540 - Pre-populating a Program's LHIN

8. To configure **Program Options**, click on the Program Options tab as identified in Figure 541.

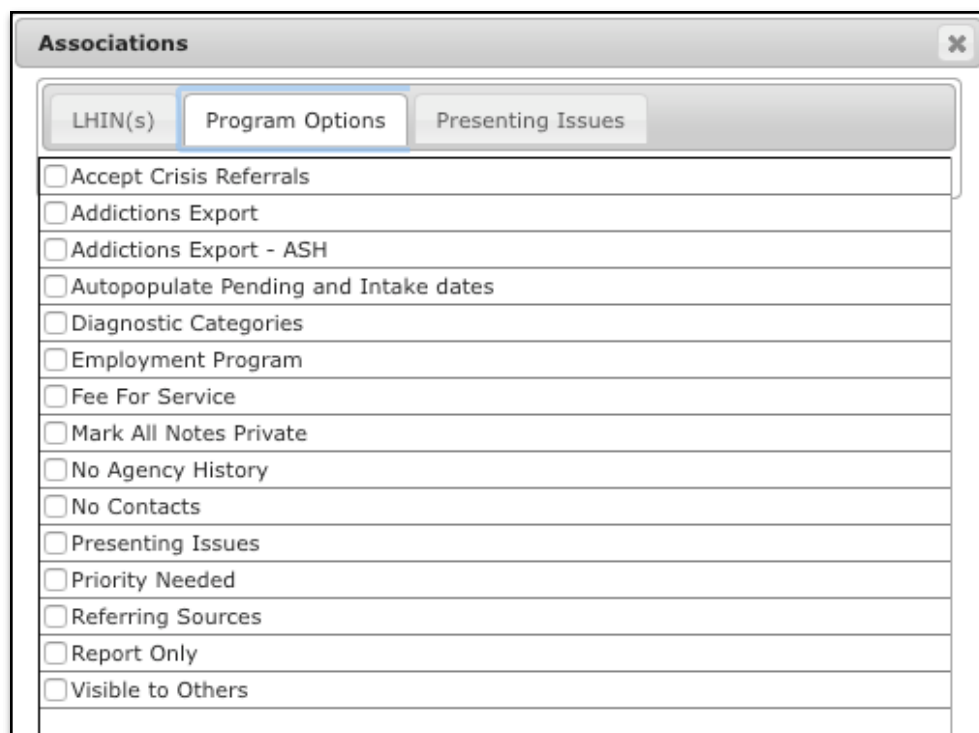


Associations

LHIN(s)
Program Options
Presenting Issues

Figure 541 - Program Options

9. The Program Options tab will then appear on screen.



Associations

LHIN(s)
Program Options
Presenting Issues

☐ Accept Crisis Referrals
☐ Addictions Export
☐ Addictions Export - ASH
☐ Autopopulate Pending and Intake dates
☐ Diagnostic Categories
☐ Employment Program
☐ Fee For Service
☐ Mark All Notes Private
☐ No Agency History
☐ No Contacts
☐ Presenting Issues
☐ Priority Needed
☐ Referring Sources
☐ Report Only
☐ Visible to Others

Figure 542 - Program Options



Most of the Program Options are legacy options designed for CRMS v1. They are no longer utilized in CRMS v2 or CRMS v3.

10. In Figure 543 below, an Administrator has checked off one program option '**Report Only**'.

☐ Referring Sources
☒ Report Only
☐ Visible to Others

Figure 543 - Configuring Program Options

11. CRMS Administrators can also pre-populate Presenting Issues for a particular program, thereby removing one data field which needs to be captured during the baseline assessment phase.

12. Click on the **Presenting Issues** tab as shown in Figure 544.

Associations

LHIN(s) Program Options Presenting Issues

Figure 544 - Pre-populating Presenting Issues

13. In Figure 545, a CRMS Administrator has configured presenting issues for a particular program.

Associations

LHIN(s) Program Options Presenting Issues

☐ Threat to Others/Attempted Suicide

☒ Specific symptoms of serious mental illness

☐ Physical/Sexual Abuse

Figure 545 - Pre-populating a Presenting Issue

14. To save the changes, simply close the window - changes will be automatically saved. A message box will confirm the process.

Successfully Saved Program Lake House

Close

Figure 546 - Successfully Saved Program Options

Lockbox

The Lockbox module overrides security settings configured for users and user groups. The Lockbox module is designed with PHIPA in mind. A CRMS Administrator can lock out individual clients from individual workers files.

1. Access the Administration module as described above on page 217.
2. Click on **Lockbox** as identified in Figure 547.

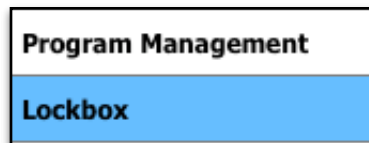


Figure 547 - Lockbox Module

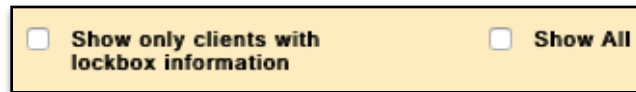
3. The Lockbox module will then appear on screen as illustrated below in Figure 548.
4. As can be seen in Figure 548, the “Client Name” list is empty.
5. This indicates that no clients are presently in the Lockbox.

A screenshot of the Lockbox module interface. It features a yellow background. At the top left, there is a 'Client Search:' label followed by a text input field. To its right is a 'Users:' label. Below these are two large, empty rectangular boxes labeled 'Client Name' and 'User Name'. On the right side of the interface, there are three buttons: 'Allow', 'Deny', and 'Clear'. At the bottom, there are two checkboxes: one labeled 'Show only clients with lockbox information' which is checked, and another labeled 'Show All' which is unchecked. To the right of the 'Show All' checkbox, there is another 'Show All' label.

Figure 548 - Lockbox Module

Adding Clients to the Lockbox

1. In order to add clients to the Lockbox, refer to page 240 above for how to access the Lockbox.
2. Uncheck **Show only clients with Lockbox information** as demonstrated in Figure 549.



☐ Show only clients with lockbox information ☐ Show All

Figure 549 - Configuring Lockbox

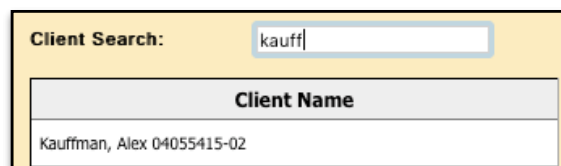
3. The “Client List” will then automatically refresh as seen in Figure 550.



Client Name
a, allie 04050017-01
Azulay, Nanci 00000122.01
Barker, Bob 04050013-01
Barney, Tag 04050011-01
Bert, Simon 04050004-01
Brady, Frank 04050016-01
Brady, Tom 04050012-02
Charlie, Thomas 04050193-02
Chef, Swedish 04050010-01
Colbert, Stephen 04050133-01
Cousin, Gregory 04050259-01
Cousin, Ian 04050433-01
Cyr, Brittany 04050275-01
Duck, Donald 04050018-01
Fehr, Simeon 04050439-01

Figure 550 - Client List Now Populated

4. Using the **Client Search** text box, type in the desired client’s name.
5. Hit enter on the keyboard once satisfied with the search parameters to cause the list to refresh.
6. In Figure 551 below, a user is searching for the client named ‘kauff’.



Client Name
Kauffman, Alex 04055415-02

Figure 551 - Searching for a Client to Add to Lockbox

7. Click on the desired client for whom the Lockbox will be configured for.
8. Upon clicking on the desired client, the “Users” list will refresh.

The screenshot shows a web interface with two main sections: 'Client Search' and 'Users'. In the 'Client Search' section, there is a search bar containing the text 'kauff'. Below it is a table with the header 'Client Name'. The table contains two rows: 'Kauffman, Alex 04055415-01' (highlighted in yellow) and 'Kauffman, Alex 04055415-02' (highlighted in blue). In the 'Users' section, there is a table with the header 'User Name'. The table contains five rows: 'Amanda Tulett', 'Anke Lansky-Johnson', 'Bob Fehir', 'Caroline Belle-Isle', and 'Christian Gosselin'.

Client Name	User Name
Kauffman, Alex 04055415-01	Amanda Tulett
Kauffman, Alex 04055415-02	Anke Lansky-Johnson
	Bob Fehir
	Caroline Belle-Isle
	Christian Gosselin

Figure 552 - Selecting Client to Configure Lockbox

9. **Click** to select the user for which the Lockbox will either allow or deny access to this particular client.
10. As can be seen in Figure 553 below, a user has selected a client, and selected a user.
11. These are identified by the blue highlights.

The screenshot shows the same web interface as Figure 552. In the 'Client Search' section, the table has two rows: 'Kauffman, Alex 04055415-01' (highlighted in yellow) and 'Kauffman, Alex 04055415-02' (highlighted in blue). In the 'Users' section, the table has five rows: 'Amanda Tulett', 'Anke Lansky-Johnson', 'Bob Fehir', 'Caroline Belle-Isle' (highlighted in blue), and 'Christian Gosselin'.

Client Name	User Name
Kauffman, Alex 04055415-01	Amanda Tulett
Kauffman, Alex 04055415-02	Anke Lansky-Johnson
	Bob Fehir
	Caroline Belle-Isle
	Christian Gosselin

Figure 553 - Configuring Lockbox for a Client / User

12. After having selected both the client and user, click on either **Allow** or **Deny** as necessary for this client/user.

The screenshot shows a small yellow box containing two buttons: 'Allow' and 'Deny'.

Figure 554 - Allowing or Denying Access to a Particular Client Using Lockbox

13. A message box will appear confirming the process.

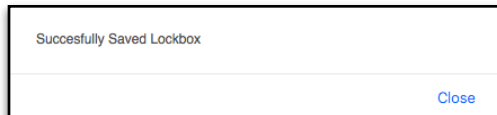


Figure 555 - Successfully Configured Lockbox

14. Clicking on **Deny** will cause the user name to appear in **red**, identifying they have been denied access to this particular client.

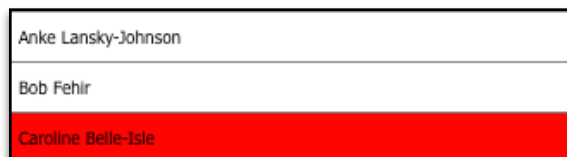


Figure 556 - User Has Been Denied Access to a Client File

15. Clicking on **Allow** will cause the user name to appear in **green**, identifying they have been given access to this particular client.

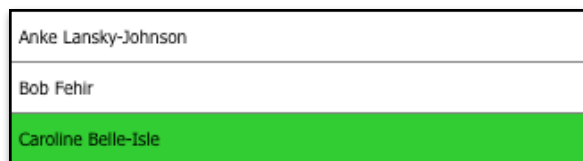


Figure 557 - User Has Been Given Access to a Client File

16. To configure the Lockbox for a 'not active' user account, first uncheck the **Show All** checkmark as seen in Figure 558.

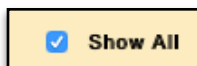


Figure 558 - Showing All User Accounts

17. The user list will then refresh automatically to display 'not active' user accounts.

18. This is reflected in Figure 559 below.

19. 'Not Active' user accounts appear in the yellow highlighted colour.

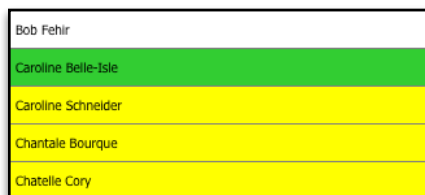


Figure 559 - Configuring Lockbox for 'Not Active' User Accounts

Removing Clients from the Lockbox

1. In order to add clients to the Lockbox, refer to page 240 above for how to access the Lockbox.
2. From the “Clients” list, **click** to select the client for whom the Lockbox will be removed.
3. **Click** to select the user for which the Lockbox will be cleared.
4. In Figure 560 below a CRMS Administrator has selected the client and the user.

Client Name	User Name
Kauffman, Alex 04055415-02	Amanda Tulett
	Anke Lansky-Johnson
	Bob Fehir
	Caroline Belle-Isle
	Christian Gosselin

Figure 560- Removing Client from Lockbox

5. Click on **Clear** to remove the Lockbox for this particular client/user.

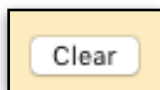


Figure 561 - Clearing Lockbox Information

6. A message box will appear confirming the process was indeed successful.

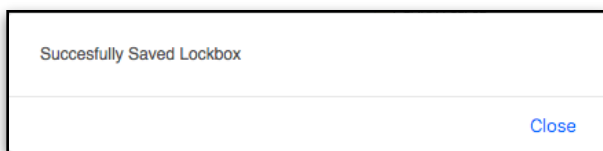


Figure 562 - Successfully Saved Lockbox

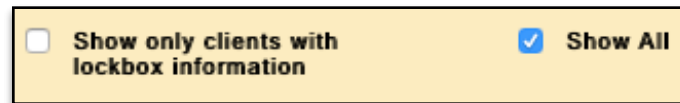
7. The Lockbox Module will then automatically refresh.

Handling Lockbox Scenarios with Multiple Client Referrals

It may occur that a client has multiple referrals (.01, .02, .03, etc.) a CRMS Administrator should take this scenarios into consideration with configuring the Lockbox.

1. Refer to page 240 above for how to access the Lockbox.

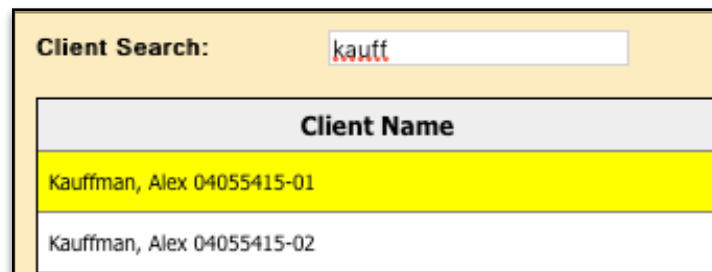
2. At the bottom of the Lockbox client list, check off the **Show All** checkmark as seen in Figure 563.



A yellow rectangular box containing two filter options. On the left, there is an unchecked checkbox followed by the text "Show only clients with lockbox information". On the right, there is a checked checkbox (with a blue checkmark) followed by the text "Show All".

Figure 563 - Ensuring "Show All" Option is Enabled

3. The Lockbox Client List will then refresh.
4. In Figure 564, a user has searched for a client named 'kauff'.



A screenshot of a search interface. At the top, it says "Client Search:" followed by a text input field containing the word "kauff". Below this is a table with a header row labeled "Client Name". The table contains two rows of results: "Kauffman, Alex 04055415-01" and "Kauffman, Alex 04055415-02". The first row is highlighted in yellow.

Figure 564 - Configuring Lockbox for Multiple Client Referrals

5. Refer to the instructions above for either allowing or denying access to these client files.

Users

The Users Module allows CRMS Administrators to create user accounts for use within the CRMS Software. Only workers with 'active' user accounts can login to the system. Users are assigned access rights (refer to 'User Groups' section of the manual) to control what modules and actions they can perform in the software.

1. Refer to page 217 above for how to access the Administration module.
2. Click on **Users** as seen in Figure 565.

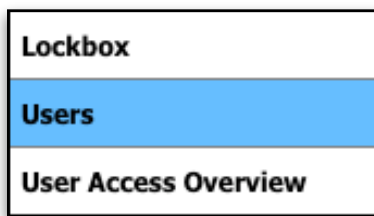


Figure 565 - Users Module

3. The Users module will then appear on screen as illustrated in Figure 566.

A screenshot of the 'Users' module interface. On the left is a search bar and a list of users: Amanda Tulett, Anke Lansky-Johnson, Bob Fehir, Caroline Belle-Isle, Christian Gosselin, CMHA Peel 01, CMHA Peel 02, CMHA Peel 03, CMHA Peel 04, CMHA Peel 05, Colleen MacPhee, Deena Shorkey, Denis Lahaie, Dylan Herbert, Heidi Vardi, Holt Sivak, Jennifer Connelly, Laurel Amey, and Letty Dagoy-Deabiens. At the bottom of the list is a 'Show All Users' checkbox. On the right is a form with fields for: Full Name, User Name, Title, Language (dropdown), Password, Confirm Password, Password Expires, Agency (dropdown), Default Program (dropdown), Phone Number, and User Groups. The 'Active' and 'Mobile User' checkboxes are checked. The 'User Groups' section has a list of checkboxes: Admin, Audit Stamp Verification, Basic Front Line, Bob, CRMS Administrators, Drop Down Editor, Export, Export, and Front Line. There are 'New' and 'Save' buttons at the top right of the form.

Figure 566 - Users Module

Creating a New User Account

1. In order to create a new user account, refer to page 246 for how to access the Users module.
2. Click **New** to ensure the Users module is in 'new' mode.

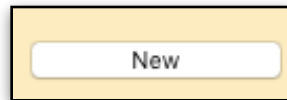


Figure 567 - Creating a New User Account

3. Fill out the necessary fields.
4. Figure 568 demonstrates a CRMS Administrator in the process of creating a user account.

Full Name:	Jillian Buck																		
User Name:	jillian																		
Title:	Data Analyst																		
Language:	English																		
Password:																			
Confirm Password:																			
Password Expires:																			
☒ Active																			
☒ Mobile User																			
Agency:	All Agencies																		
Default Program:	Case Management																		
Phone Number:	613 456 3562																		
User Groups:	<table><tr><td>☒</td><td>Admin</td></tr><tr><td>☐</td><td>Audit Stamp Verification</td></tr><tr><td>☒</td><td>CRMS Administrators</td></tr><tr><td>☐</td><td>Export</td></tr><tr><td>☒</td><td>Front Line</td></tr><tr><td>☐</td><td>Housing</td></tr><tr><td>☐</td><td>IOS Admin</td></tr><tr><td>☒</td><td>IT</td></tr><tr><td>☒</td><td>Managers</td></tr></table>	☒	Admin	☐	Audit Stamp Verification	☒	CRMS Administrators	☐	Export	☒	Front Line	☐	Housing	☐	IOS Admin	☒	IT	☒	Managers
☒	Admin																		
☐	Audit Stamp Verification																		
☒	CRMS Administrators																		
☐	Export																		
☒	Front Line																		
☐	Housing																		
☐	IOS Admin																		
☒	IT																		
☒	Managers																		

Figure 568 - Creating a New User Account

5. Table 3 below outlines the key fields when creating a user account.

Field	Purpose
Full Name	The name displayed across the software (drop downs etc.) - Must be filled out.
User Name	The login name the user will input when logging into CRMS - Must be filled out and UNIQUE
Title	An additional field which can be used on letters etc., to display users' title.
Language	The language used across CRMS.
Password	The password the user will type when accessing CRMS.
Password Expires	The date which will cause the password reset prompt to appear for the user.
Active	Whether the user can login to CRMS or not. 'Not Active' account cannot login.
Mobile User	Whether the user can login to CRMS v3 or not.
Agency	The agency which the user belongs to - used only in multi-agency setups.
Program	The default program for which the user belongs to. Also used with MyAssistant.
Telephone Number	An additional field which can be used on letters etc., to display users' tel #.
Groups	Controls the access rights for the user (visible modules, actions, etc.)

Table 3 - User Fields

6. When satisfied with the changes, click **Save** to finalize the process.

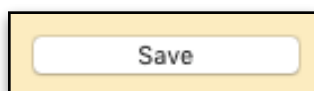


Figure 569 - Saving a New User Account

7. A message box will appear confirming the process was indeed successful.



Figure 570 - Successfully Saved New User Account

8. The newly created user account will then appear in the Users list.

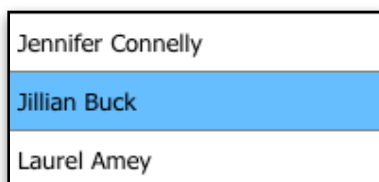


Figure 571 - Reviewing Newly Created User Account

De-Activating a User Account

1. Should a staff member leave the agency for any reason, their account must be marked as 'Not Active' to prevent them from logging into CRMS.
2. Refer to page 217 above for how to access the Administration module.
3. Click on **Users** and locate the desired user account.
4. **Uncheck** the 'Active' checkmark as seen in Figure 572.

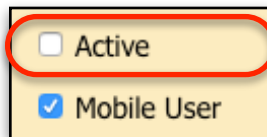


Figure 572 - De-activated a User Account

5. Click **Save** to finalize the process.

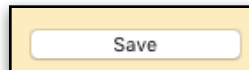


Figure 573 - Saving User Account

6. The user account will then vanish from the list of 'active' users.
7. Follow the instructions below for how to re-activate the user account.

Re-Activating a User Account

1. Should a user account be marked as 'not active', the user will be unable to login to CRMS.
2. Refer to page 217 above for how to access the Administration module.
3. **Click** on Users.
4. Click on **Show All** located below the list of user accounts to display 'not active' users.



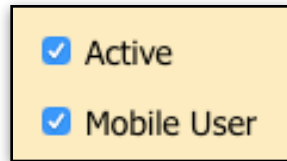
Figure 574 - Showing All Users

5. Locate the 'not active' user account. 'Not Active' users are highlighted in yellow.



Figure 575 - Locating a 'Not Active' User Account

6. Click on the desired user account which will be re-activated.
7. **Recheck** the 'Active' check mark.



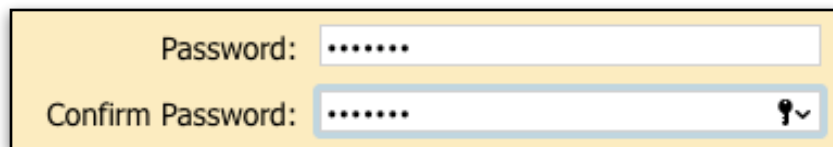
A yellow rectangular box containing two checkboxes. The first checkbox is checked and labeled 'Active'. The second checkbox is also checked and labeled 'Mobile User'.

Figure 576 - Re-activating a User Account

8. Click **Save** to finalize the process.
9. The user account will then be re-activated and the user will be able to login to CRMS.

Performing a Password Reset

1. Should a user forget their password, a CRMS Administrator can easily reset it for the user.
2. Access the Administration module by referring to page 217.
3. Click on the **Users** module.
4. Locate the user account for which the password will be reset.
5. Input the new password in the **Password** field.



A yellow rectangular box containing two text input fields. The first field is labeled 'Password:' and contains six dots. The second field is labeled 'Confirm Password:' and also contains six dots. To the right of the 'Confirm Password' field is a small key icon with a downward arrow.

Figure 577 - Performing a Password Reset

6. Click **Save** to finalize the process.
7. The user can then attempt to login using the new password.



****TIPS AND TRICKS* - Password should be reset to 'crms123'. This will force the user into resetting their password upon login. **IN CONSTRUCTION**.***

User Access Overview

The User Access Overview module allows CRMS Administrators to quickly review user accounts and user groups. It provides them with an overview of which user groups does the user belong to, and which permissions has the user been given access to.

1. Refer to page 217 above for how to access the Administration module.
2. Click on **User Access Overview** as seen in Figure 578.

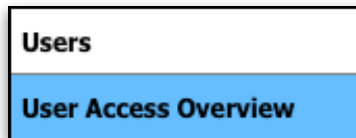


Figure 578 - User Access Overview Module

3. The User Access Overview module will then appear on screen as demonstrated in Figure 579.

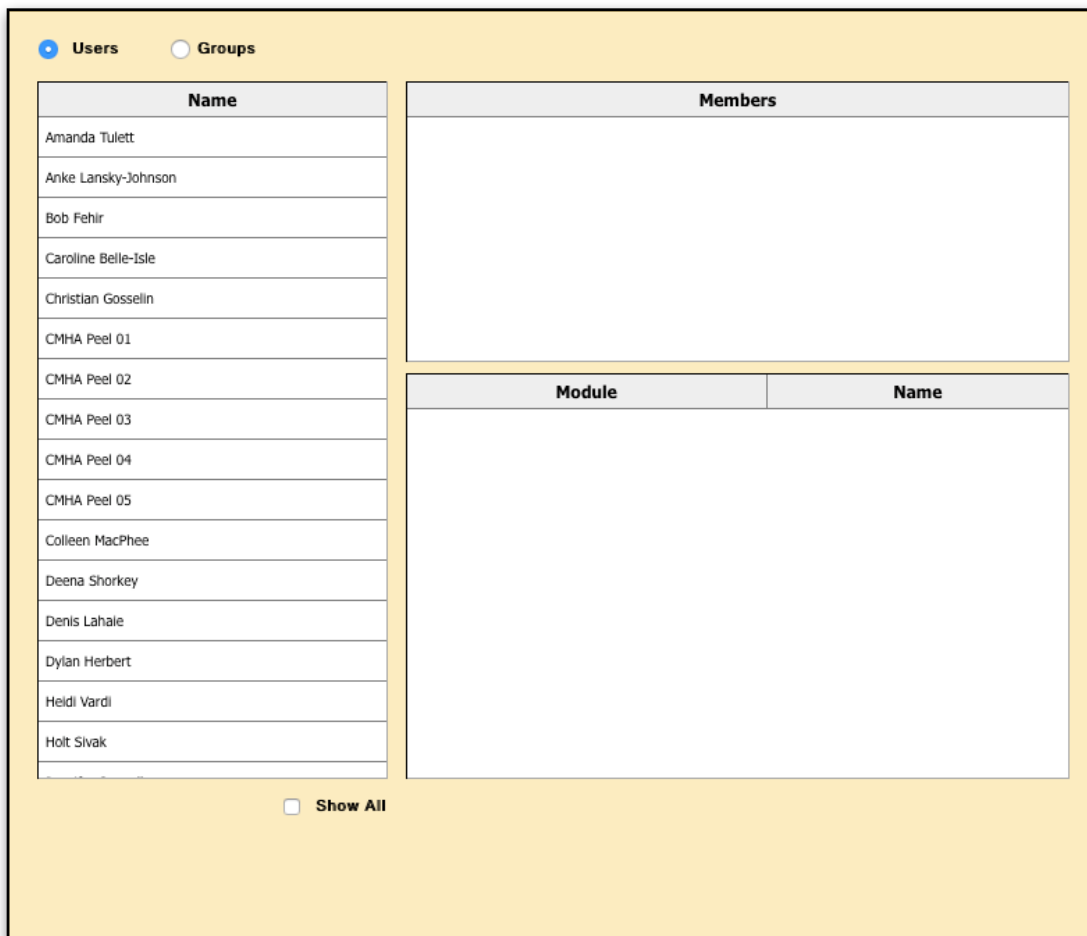


Figure 579 - User Access Overview

4. The User Access Overview module has two different points of view : the 'User' perspective, and the 'Groups' perspective.

'Users' Point of View

1. Refer to page 251 above for how to access the User Access Overview module.
2. Ensure that the **Users** option button is selected as shown in Figure 580.



Figure 580 - Reviewing from the 'Users' POV

3. From the list of available users, **click** to select the account which will be reviewed.
4. In Figure 581, a CRMS Administrator has selected the user 'Christian Gosselin'.

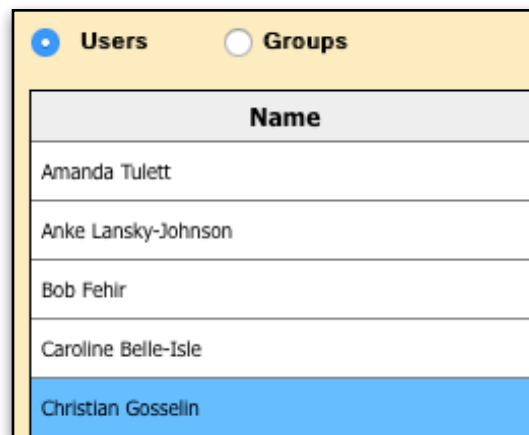


Figure 581 - Selecting User Account to Review

5. Upon selecting the desired user, the User Access Overview module will automatically refresh.
6. As can be seen in Figure 582, the User Access Overview module lists all the 'User Groups' for which this user account belongs to.

Members
Admin
Audit Stamp Verification
Front Line
IOS Admin
Managers

Figure 582 - Reviewing User Group Membership for a User Account

7. Additionally, the User Access Overview module will also list the permissions this user has been given access to.
8. This is demonstrated below in Figure 583.

Module	Name
addiction_plugin	
administration	DATIS Referrals Tab
administration	DATIS Value Mapping Tab
Client Info	DATIS Page
Client Info	Tracking Summary Page
plugin	load
view	DATIS Export
view	DATIS Synchronization
admin_plugin	

Figure 583 - Reviewing Access Rights Assigned to User Account

'Groups' Point of View

1. Alternatively, CRMS Administrators can review these data points from the other perspective - the 'Groups' POV.
2. This will display which users belong to which groups, and which permissions have been assigned to these groups.
3. Refer to page 251 above for how to access the User Access Overview module.
4. Ensure that the **Groups** option button is selected as shown in Figure 584.

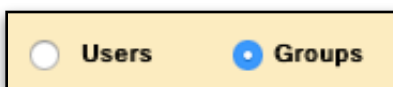


Figure 584 - Reviewing from the 'Groups' POV

5. From the list of available User Groups, **click** to select the desired Group to review.

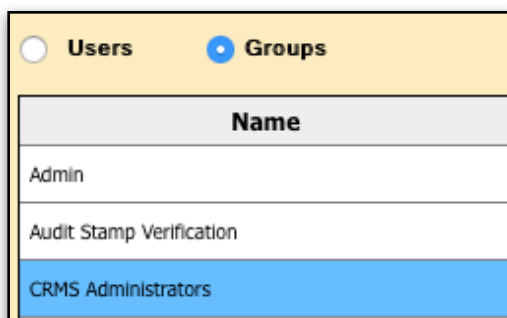


Figure 585 - Selecting User Group to Review

6. Upon selecting the User Group, the User Access Overview module will automatically refresh to display the user accounts which belong to the selected user group.

Members
Denis Lahale
Jillian Buck
Mike Barlow
Ryan McVey

Figure 586 - Reviewing User Account Membership for a User Group

7. Additionally, the User Access Overview module will also list the permissions this user group has been assigned.
8. This is demonstrated below in Figure 587.

Module	Name
application	
application	Task Pane
client_demographics_plugin	
Client Info	Medication Reconciliation
File	MyAssistant

Figure 587 - Reviewing Access Rights Assigned to User Group

Show All

1. Note that the User Access Overview module by default will only display 'active' user accounts and 'active' user groups.
2. A CRMS Administrator can review 'not active' user accounts and user groups by clicking on '**Show All**' as seen below.

Jillian Buck
Laurel Amey
☐ Show All

Figure 588 - Showing All User Account / User Groups

User Groups

The User Groups module controls every aspect of the software. From which modules the user can see to which sets of program data they can view (if program security is utilized). This configuration is the most important aspect of a CRMS Administrators responsibilities.

1. Refer to page 217 for how to access the Administration module.
2. Click on **User Groups** as shown in Figure 589.

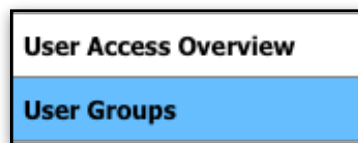


Figure 589 - User Groups Module

3. The User Groups module will then appear on screen.

Figure 590 - User Groups Module



User Group configuration controls nearly every aspect of the software. Pay very close attention to the access rights you are granting.

Creating a New User Group

1. To create a new user group, refer to page 255 above for how to access the **User Groups** module.
2. Click on **New** as identified in Figure 591.

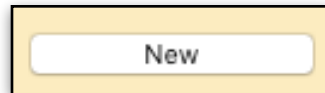


Figure 591 - Creating a New User Group

3. Provide a user group name as seen in Figure 592.
4. As well, ensure the 'Active' check mark is checked.

Full Name:	OCAN Administrator
	☒ Active

Figure 592 - Entering User Group Name

5. Check out the necessary access rights in the **Features** list.

Features:	☐ View All Workers Assessments
	Forms
	☐ Change worker name
	☐ Edit Forms
	☐ Edit Notes
	☐ Edit Other Workers Notes
	☒ Modify Complete OCAN
	☐ New Forms
	☐ New Notes
	☐ OCAN 2.0 Data Export
	☐ OCAN Phase 2 Data Export
	☐ Print Forms
	☐ Print Notes
	☐ Reportable Form Data Export
	OCAN Staff Workload
☒ Change Worker	
plugin	
☐ load	
View	

Figure 593 - Assigning Access Rights to User Group

6. Refer to page 265 below for a detailed list explaining the various access rights available in CRMS.
7. Once satisfied with the changes, click **Save** to finalize the process.

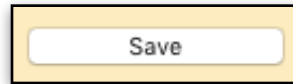


Figure 594 - Saving User Group

8. A message box will appear confirming the process was indeed successful.



Figure 595 - Successfully Saved User Group



****TIPS AND TRICKS* - When creating a group, the creator is automatically assigned to the group. Don't forget to assign access to this group for any additional CRMS Administrators or users.***

De-Activating a User Group

1. To de-activate a user group, refer to page 255 above for how to access the **User Groups** module.
2. **Click** to select the desired group which will be de-activated.
3. **Uncheck** the 'Active' checkmark as demonstrated in Figure 596.
4. As can be seen below, a CRMS Administrator is de-activated a user group named 'IT'.

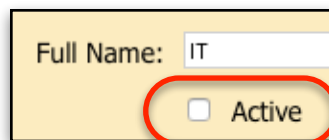


Figure 596 - De-activating a User Group

5. Click **Save** to finalize the process.
6. The newly de-activated user group will then vanish from the list.

Re-Activating a User Group

1. To re-activate a user group, refer to page 255 above for how to access the **User Groups** module.
2. At the bottom of the list of 'active' user groups, **check off** the **Show All User Groups** box as identified in Figure 597.

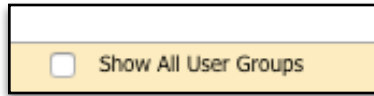


Figure 597 - Showing All User Groups

3. The User Group List will automatically refresh and 'not active' user groups will then be displayed in a yellow highlighted color.

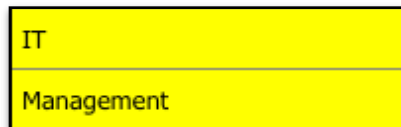


Figure 598 - Locating a 'Not Active' User Group

4. **Click** to select the desired user group which will be re-activated.
5. **Re-check** the 'Active' check mark as shown in Figure 599.

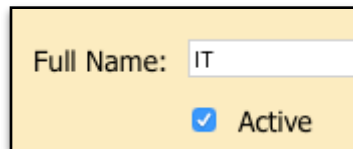


Figure 599 - Re-activating a User Group

6. Click **Save** to finalize the process. The 'not active' user group will then become 'active'.

Program Security

Depending on an agencies needs to privacy amongst the various teams or workers within the organization, the CRMS Administrator can configure 3 distinct layers of '**program security**'. Refer to the section 'Program Management' on page 233 for how to create a program.

Table 4 (see following page) outlines and describes the three various layers of '**program security**'.

Security Layer	Applicable To	Description
Client Search	CRMS Search Engine	Should the user not have access to a program for this particular layer, they will be unable to locate a client who is solely in that program. Should a client be in two programs, one for which the user does have access to, the client will be visible on the Search Engine.
Agency History	Agency History	Should the user not have access to a program for this particular layer, the 'program page' will be made hidden within the Agency History page. I.e. A client is receiving services from Case Management and Addictions. A worker is only granted access to Addictions. The Case Management 'program page' will be hidden from view.
Forms History	Forms History	Should the user not have access to a program for this particular layer, 'notes' and 'forms' will be made hidden within the Forms History module. I.e. A client is receiving services from Case Management and Addictions. A worker is only granted access to Addictions. The Case Management 'notes' and 'forms' will be hidden from view.

Client Search Security Layer Example

1. A client, 'Alex Kauffman' is receiving services from *two* of the programs offered by the agency - '*Addictions*' and '*Case Management*'.
2. The current CRMS user has only been granted access to the '*Addictions*' program.
3. Note in Figure 600 that the client **appears** in the search results - as the worker has access to **one** of the clients' programs, the client appears.
4. If the client was only in the program for which the user does **NOT** have access to, the client would be **hidden**.

The screenshot shows the CRMS Web interface. At the top, it says 'CRMS Web' and 'Mobile Dev System CRMS Search Engine'. There's a 'View' dropdown and a user name 'Christian Gosselin'. On the left, there's a search sidebar with the following options:

- Search Type: Demographics
- Search By: Last Name
- Is Like: kauff
- Active Only (checkbox)
- Latest Record Only (checkbox, checked)
- Use SoundEx (checkbox)
- Assigned Clients (checkbox)
- Custom Client List (checkbox)
- Program: All Programs
- Active In Program (checkbox)
- Worker: All Workers
- Search button

The main content area shows the details for 'Kauffman, Alex':

- Birthdate: May 6, 1976
- Status: Active
- Client Number: 04055415
- Admission: 2

At the bottom of the main content area, it says 'Showing 1 clients'.

Figure 600 - Client Search Security Layer Example

Agency History Security Layer Example

1. A client, 'Alex Kauffman' is receiving services from *two* of the programs offered by the agency - 'Addictions' and 'Case Management'.
2. The current CRMS user has only been granted access to the 'Addictions' program.
3. Note in Figure 601 below, how the 'Addictions' program is **NOT** visible.
4. Due to the access rights for this user, it has been made hidden.

The screenshot shows the 'CRMS Web' interface for a client named 'Kauffman, Alex (04055415-02) - Active'. On the left sidebar, under 'Agency History', the 'Addictions' program is not visible, while 'Case Management' is listed with a pending assessment date of May 3, 2016. The main content area contains various fields for client information, including Referral Source (Community Mental Health Agency), Address, Activation Date (May 03, 2016), Diagnostic Category (Anxiety Disorder), and Common Data Set Evaluation. A red circle highlights the 'Agency History' section in the sidebar.

Figure 601 - Agency History Security Layer Example

5. Note in Figure 602 however, that the 'Addictions' program is indeed **visible** as this user **DOES** have the necessary access rights.

This screenshot is similar to Figure 601, showing the same client information. However, in the 'Agency History' sidebar, the 'Addictions' program is now visible, listed with a pending assessment date of May 11, 2016. The 'Case Management' program is also listed with a pending assessment date of May 3, 2016. A red circle highlights the 'Agency History' section in the sidebar.

Figure 602 - Agency History Security Layer Example

Forms History Security Layer Example

1. A client, 'Alex Kauffman' is receiving services from *two* of the programs offered by the agency - 'Addictions' and 'Case Management'.
2. The current CRMS user has only been granted access to the 'Addictions' program.
3. Note in Figure 603 below, how the 'Addictions' note is **NOT** visible.
4. Due to the access rights for this user, it has been made hidden.

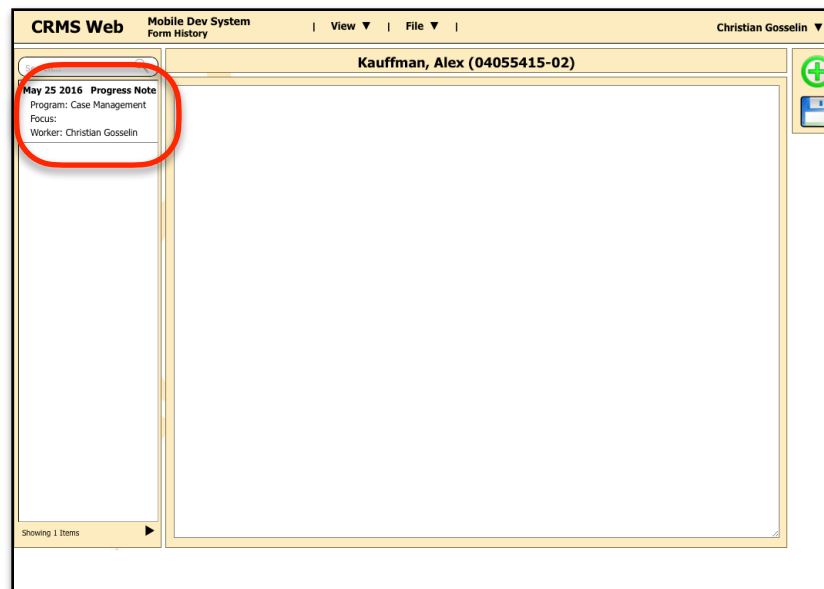


Figure 603 - Forms History Security Layer Example

5. Note in Figure 604 however, that the 'Addictions' program is indeed **visible** as this user **DOES** have the necessary access rights.

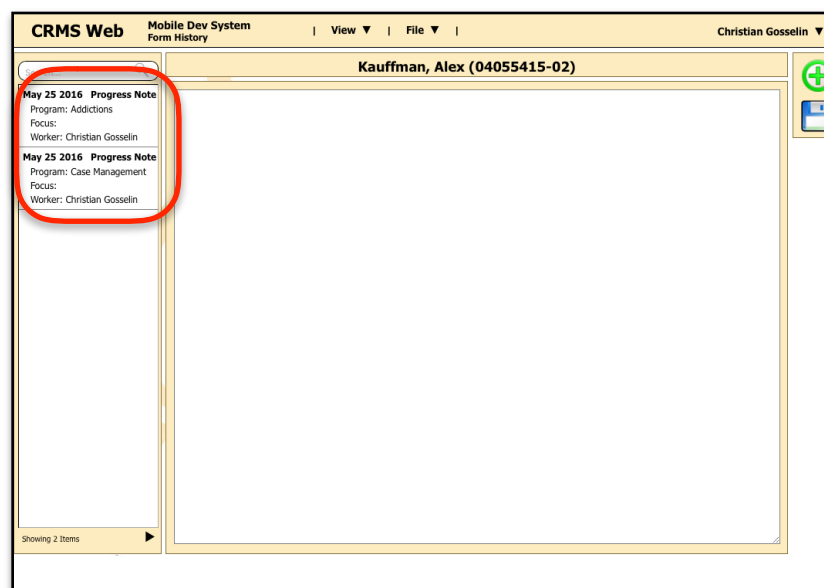


Figure 604 - Forms History Security Layer Example

Configuring Program Security

1. To configure Program Security for a user group, refer to page 255 for how to access the **User Groups** module.
2. **Click** on the desired user group for which program security will be configured.
3. Click on the **Details** button as seen in Figure 605.

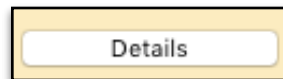


Figure 605 - Access User Group Details

4. The User Group Additional Details dialog will appear as seen in Figure 606.

Program	Client Search	Agency History	Forms History
Addictions	☐	☐	☐
Addictions	☐	☐	☐
Addictions - Supportive Housing	☐	☐	☐
Case Management	☒	☐	☐
Central Intake	☐	☐	☐
City of Windsor	☒	☒	☒
Clubhouse	☐	☐	☐
Community Support Services	☒	☒	☒
Concurrent Disorders	☐	☐	☐
Counseling	☒	☒	☒
Court Support Services	☐	☐	☐
Crisis	☐	☐	☐
CSI	☐	☐	☐
CSS	☐	☐	☐
CSS East	☐	☐	☐
CSS West	☐	☐	☐
Episode Psychosis - ON	☐	☐	☐
First Episode Psychosis	☐	☐	☐
Frank's Case Management	☐	☐	☐
HOP	☐	☐	☐
Intake	☐	☐	☐

Save

Figure 606 - User Group Additional Details Dialog

5. Check off the programs for each column : Client Search, Agency History, Forms History as necessary. Note that programs in yellow are 'not active'.
6. Refer to pages 259 for the explanation of the three distinct security layers.
7. When satisfied, click **Save** to finalize the process.

User Group Example

CRMS Administrators can easily create as many user groups as necessary each only having the required access rights. As users receive all the permissions from each of the user groups they are assigned, there is no need to duplicate access rights across user groups without a specific need.

Figure 607 below provides an example of a user with access rights to two different user groups.

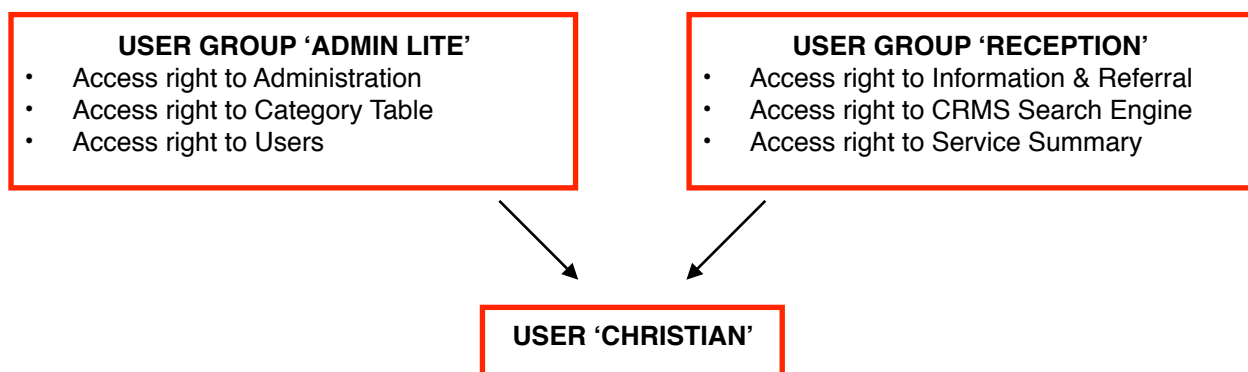


Figure 607 - User / User Group Example

As can be seen in Figure 607 above, the user 'Christian' would have access right to perform some very basic administrative functions such as modifying / updating drop downs, performing password resets, inputting Information & Referral data when phone calls are received, the ability to search for clients and see which programs they belong with which worker, and their last contact.

They would not have the ability to save a client file, add a program, or even open a client file to begin with to view their demographic data if necessary.

Should the user 'Christian' need more access rights, the CRMS Administrator has three choices : assign the user to a pre-existing user group, modify an existing user group, or create a new user group.



****TIPS AND TRICKS* - When modifying an existing user group, ALL users assigned to that group also received that new access right. In this case, create a new user group solely with that access right.***

The following section of the manual will outline the access rights and their various functions.

Plugin Grouping

When configuring access rights for a user group, the access rights are grouped by “plugin”. These plugins group similar access rights together. Plugins can be identified in the **Features** of the **User Groups** module as shown below in Figure 608. Note in Figure 608 as well that ‘Client Search’ has been highlighted to identify where those access rights are applicable.

admin_plugin
administration
☐ Agency Information Tab
☐ Audit Log Tab
☐ Category Table Editor Tab
☐ CDS Data Map Tab
☐ Data Feed Tab

chart_plugin
administration
☐ CIHI Facility Information Tab
☐ HTML Form Generator
☐ Template Form Admin Tab
☐ Client Search
☐ Archived Notes
☐ Forms
☐ Group Form
☐ New Form
☐ View All Workers Assessments

Figure 608 - Plugin Grouping

User Access Rights Reference Guide

The following section of the manual will describe the various access rights and their purpose in the software.

admin_plugin
admin
☒ view

Admin_Plugin —> **View** = Grants access to the View Menu, Administration drop down choice as seen below. This is the base access right in order to access the Administration modules.

CRMS Web

Mobile Dev System Administration

| View ▼ |

Administration

Figure 609 - Admin_Plugin - ‘View’ Access Right



****TIPS AND TRICKS* - Do not forget a user can be a member of multiple user groups! A proficient CRMS Administrator can quickly create a new group with solely the needed access rights to suit their needs.***

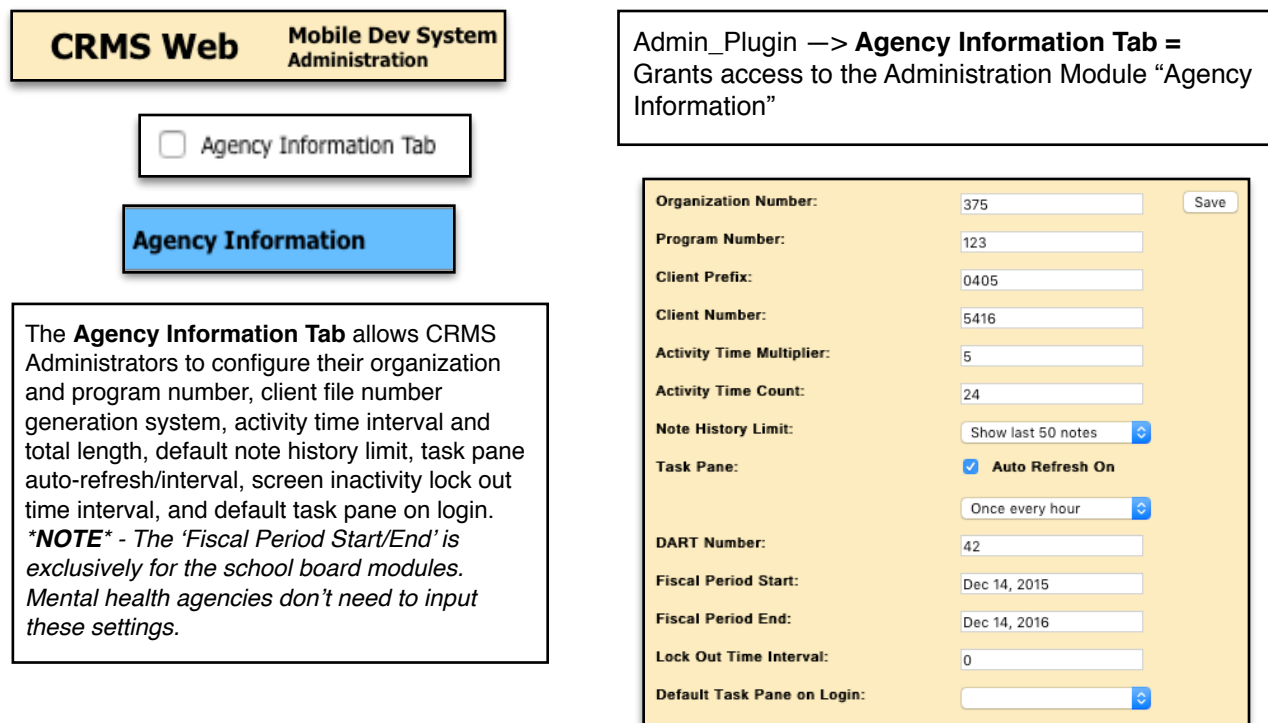


Figure 610 - Agency Information Tab Access Right

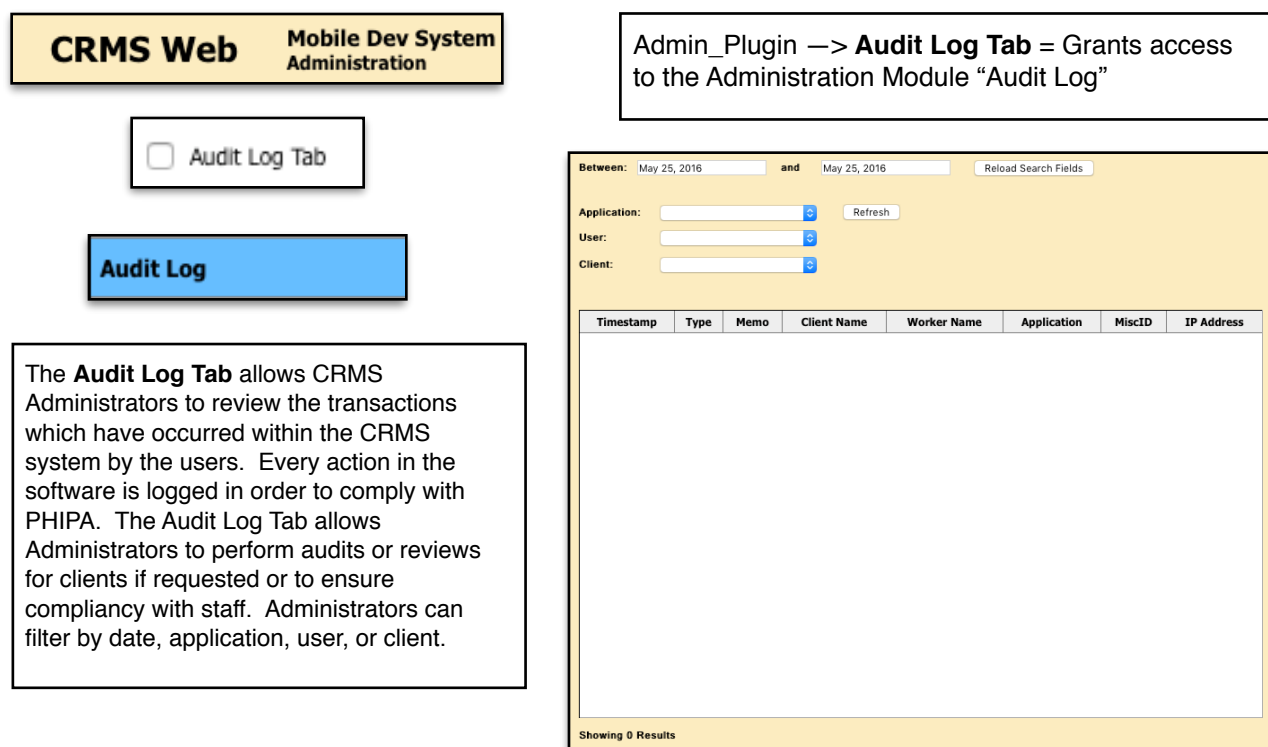


Figure 611 - Audit Log Tab Access Right

☐ Category Table Editor Tab

Category Table

The **Category Table Tab** allows CRMS Administrators to modify, add, or remove drop down values to the menus located throughout CRMS. CRMS Administrators can also configure the default of a particular menu, along with the desired sort order to better suit the needs of the users.

NOTE - Some menus are hidden from Administrators they are defined by the MOHLTC.

Admin_Plugin —> **Category Table Editor Tab** =
Grants access to the Administration Module
“Category Table”

Type:

Group:

Value:

Value (French):

Code:

☐ Active

Category:

Class:

Order:

☐ Default

Description:

New

Save

Search

Value	Active	Sort	Default

Figure 612 - Category Table Editor Access Right

☐ Translation Tab

Translations

The **Translations Tab** allows CRMS Administrators to input their own desired translations for the labels used across the CRMS system when a user has their account switched to 'French' Language.

Admin_Plugin —> **Translation Tab** = Grants access to the Administration Module “Translations”

Language:

French

Search Key:

Search

English Key	Value

☒ Active

Key:

Value:

New

Save

Figure 613 - Translation Tab Access Right

☐

User Group Assoc Tab

User Groups

The **User Groups** tab allows CRMS Administrators to control what groups of workers can see and perform within the software. This is the most critical element of configuring CRMS. Improper setup of these groups can either remove options from a user, or give them additional access rights they do not require.

Admin_Plugin —> **User Group Assoc Tab** = Grants access to the Administration Module “User Groups”

Search:

Admin

Audit Stamp Verification

CRMS Administrators

Export

Front Line

Housing

iOS Admin

IT

Managers

Reports

Secretaire

Test User

Workers

☐ Show All User Groups

Full Name:

Front Line

New

Active

Save

Details

Features:

☐ DATIS Synchronization

admin_plugin

administration

☐ Agency Information Tab

☐ Audit Log Tab

☐ Category Table Editor Tab

☐ CDS Data Map Tab

☐ Data Feed Tab

☐ Data Map Tab

☐ Group Management Tab

☐ Interface Sorting Tab

☐ Patch Manager Tab

☐ Postal Code County Tab

☐ Translation Tab

☐ User Group Assoc Tab

☐ User Management Tab

☐ view

plugin

load

Figure 614 - User Group Assoc Access Right

☐

User Management Tab

Users

The **Users** tab allows CRMS Administrators to create user accounts, de-activate user accounts, re-assign user access groups, reset passwords and update other user information.

Admin_Plugin —> **User Management Tab** = Grants access to the Administration Module “Users”

Search:

Amanda Tulett

Anke Lansky-Johnson

Bob Fehir

Caroline Belle-Isle

Christian Gosselin

CMHA Peel 01

CMHA Peel 02

CMHA Peel 03

CMHA Peel 04

CMHA Peel 05

Colleen MacPhee

Deena Shorkey

Denis Lahale

Dylan Herbert

Heidi Vardi

Holt Sivak

Jennifer Connelly

Jillian Buck

Laurel Amey

☐ Show All Users

Full Name:

User Name:

Title:

Language:

Password:

Confirm Password:

Password Expires:

Active

Mobile User

Agency:

Default Program:

Phone Number:

User Groups:

☐ Admin

☐ Audit Stamp Verification

☐ CRMS Administrators

☐ Export

☐ Front Line

☐ Housing

☐ iOS Admin

☐ IT

☐ Managers

Figure 615 - User Management Tab Access Right

Client_demographics_plugin —> **Client Lock Box Tab** = Grants access to the Administration Module “Lockbox”

☐ Client Lock Box Tab

Lockbox

The **Lockbox** tab allows CRMS Administrators to lock out individual users from individual clients on a client by client and user by user basis.

Client Search:

Users:

Client Name

User Name

Allow

Deny

Clear

☒ Show only clients with lockbox information
 ☐ Show All
 ☐ Show All

Figure 616 - Client Lock Box Tab Access Right

Client_demographics_plugin —> **Program Management Tab** = Grants access to the Administration Module “Program Management”

Program Management

☐ Program Management Tab

The **Program Management** tab allows CRMS Administrators to create new programs for reporting purposes or modify program type to create custom aggregates for statistical purposes. CDS Functional Centre grouping is configured in this module. CRMS Administrators can also pre-populate Language Delivery and Presenting Issues in this module for their individual programs.

Search:

Search

Program Name

All Agencies

Addictions

Case Management

City of Windsor

Community Support Services

Concurrent Disorders

Counseling

Court Support Services

Crisis

Intensive CM

Lake House

Lake House

Lake House

Orthophonie

Psychologie

Supported Housing

Agency:

CDS Function:

Program Type:

Program Name:

Active

Program Description:

Region:

Site/Region:

Program Number:

Organization Number:

Language Delivery:

☒ English
 ☐ French
 ☐ Other

Associations

New

Save

☐ Show All

Figure 617 - Program Management Tab

Crisis Call Administration☐ Crisis Call Administration Tab

The **Crisis Call Administration** tab allows users and CRMS Administrators perform administrative tasks related to the Crisis Call Module such as linking a crisis client to a registered CRMS client file, merging two crisis clients together, linking calls, or creating crisis clients without the associated crisis call. This module might be granted to a manager or a person with a supervisory role.

Crisis_plugin —> **Crisis Call Administration Tab** = Grants access to the Administration Module “Crisis Call Administration”

The screenshot shows the 'Crisis Call Administration' interface. At the top, there are four tabs: 'Link Clients', 'Merge Crisis Clients', 'Link Call', and 'Create Crisis Clients'. Below the tabs, there are two main sections: 'Crisis Clients' and 'CRMS Clients'. Each section has search fields for 'Last Name', 'First Name', and a specific ID (Crisis Client ID or CRMS Client #), along with a 'Search' button. Below the search fields are two tables. The first table, under 'Crisis Clients', has columns: 'Last Name', 'First Name', 'Birth Date', 'Crisis Client ID', and 'Linked CRMS Client'. The second table, under 'CRMS Clients', has columns: 'Last Name', 'First Name', 'Birth Date', and 'Client Number'. At the bottom right, there is a 'Link Clients' button.

Figure 618 - Crisis Call Administration Tab Access Right

☐ Client Group Management Tab**Client Group Management**

The **Client Group Management** tab allows users, and CRMS Administrators the ability to modify client groups details such as the program, worker whom it is configured to and whether the client group is active. This module might be granted to a manager or a person with a supervisory role.

Client_demographics_plugin —> **Client Group Management Tab** = Grants access to the Administration Module “Client Group Management”

The screenshot shows the 'Client Group Management' interface. On the left, there is a list of client groups with the following names: Activities, Agency Tours, Anger Management, Anger Management - School B, Anxiety, Bowling Group, CHHA Calgary Group, CHHA Hamilton Training Group, CHHA Training 2, CHHA Training Group, CHHA York Training 2, Community Kitchen, CRMS Group AD, CRMS Group CM, CRMS v2 Pilot Group, and Daily Living. At the bottom of this list are 'Duplicate' and 'Show All' buttons. On the right, there is a detailed form for editing a group. It includes fields for 'Group Name', 'Group Type', 'Program' (a dropdown menu), 'Worker' (a dropdown menu), and a checkbox for 'Active'. There are 'New' and 'Save' buttons at the top right of the form.

Figure 619 - Client Group Management Tab Access Right

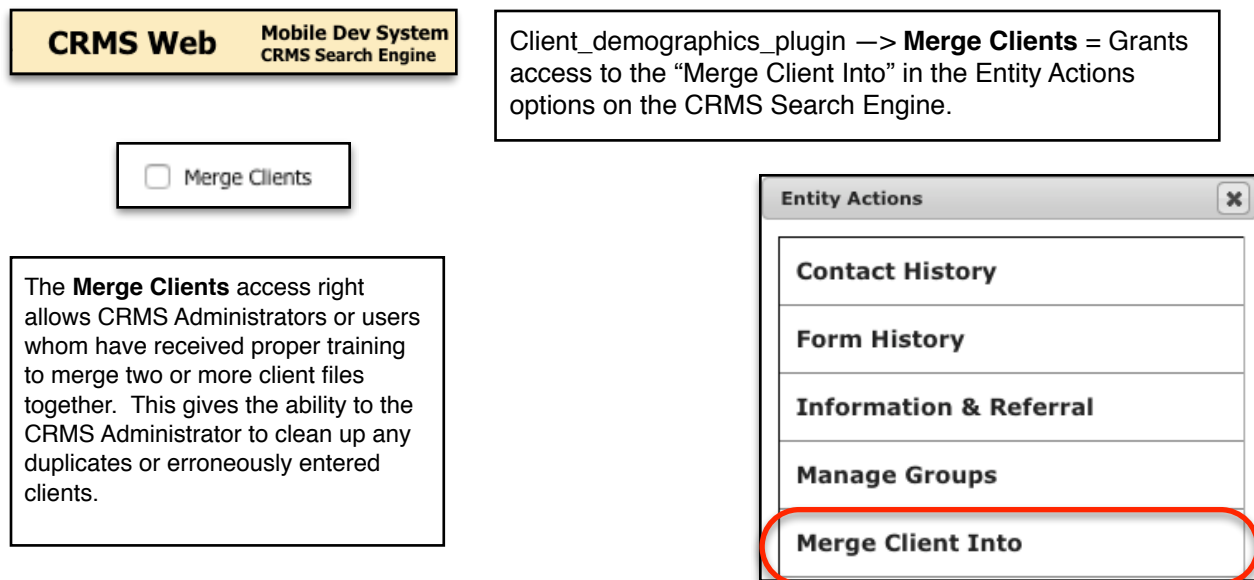


Figure 620 - Merge Clients Groups Access Right

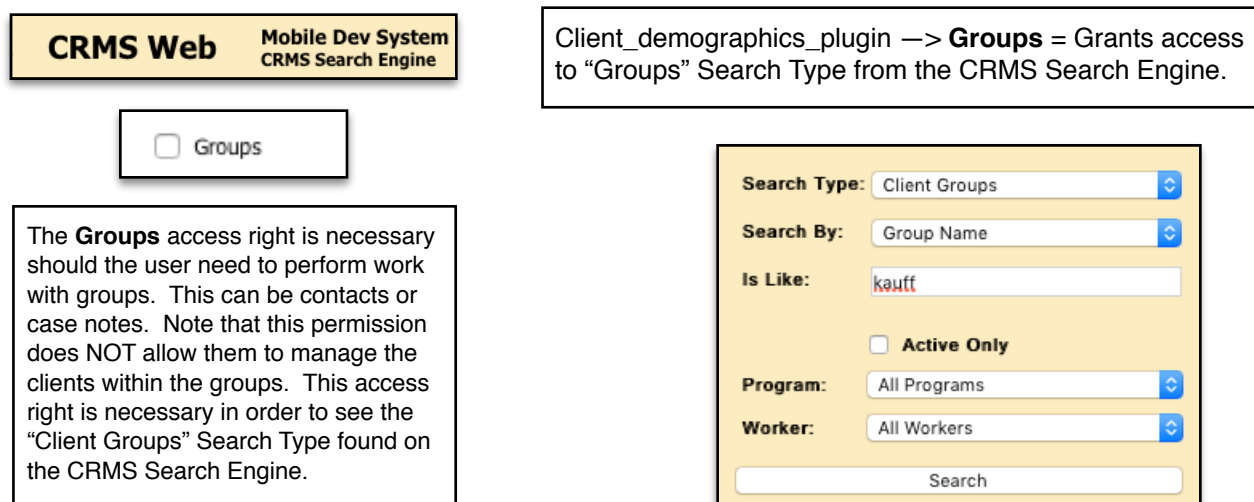


Figure 621 - Groups Access Right

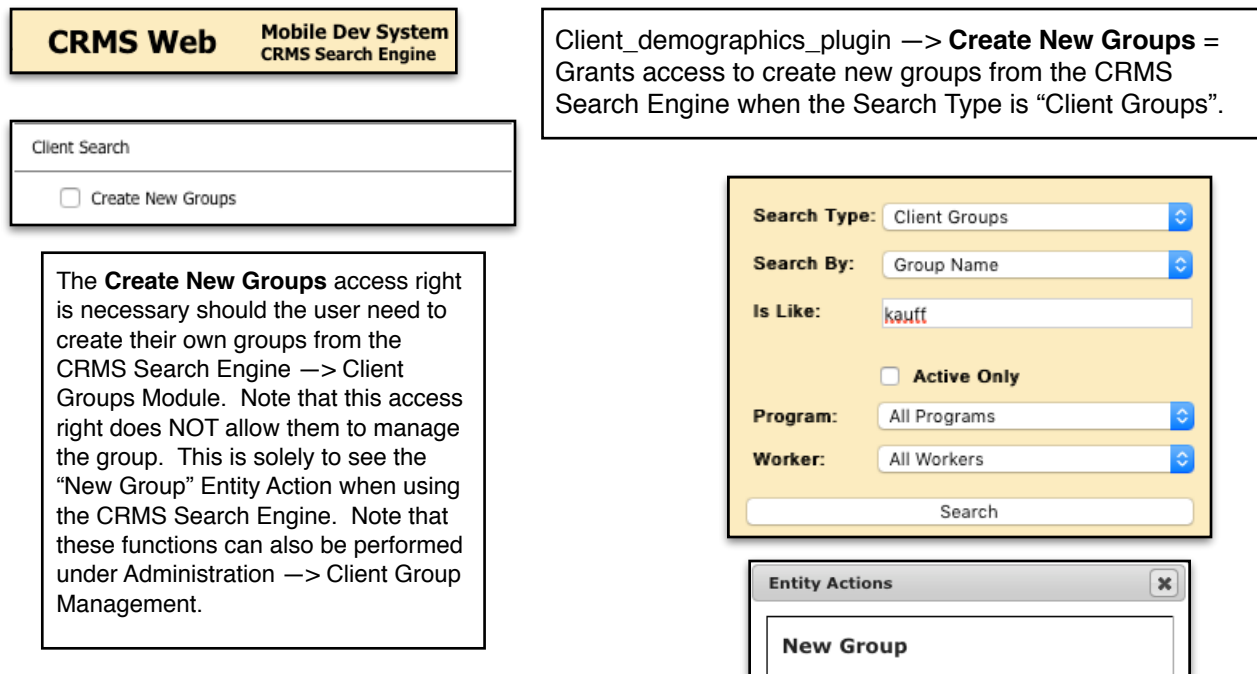


Figure 622 - Create New Groups Access Right

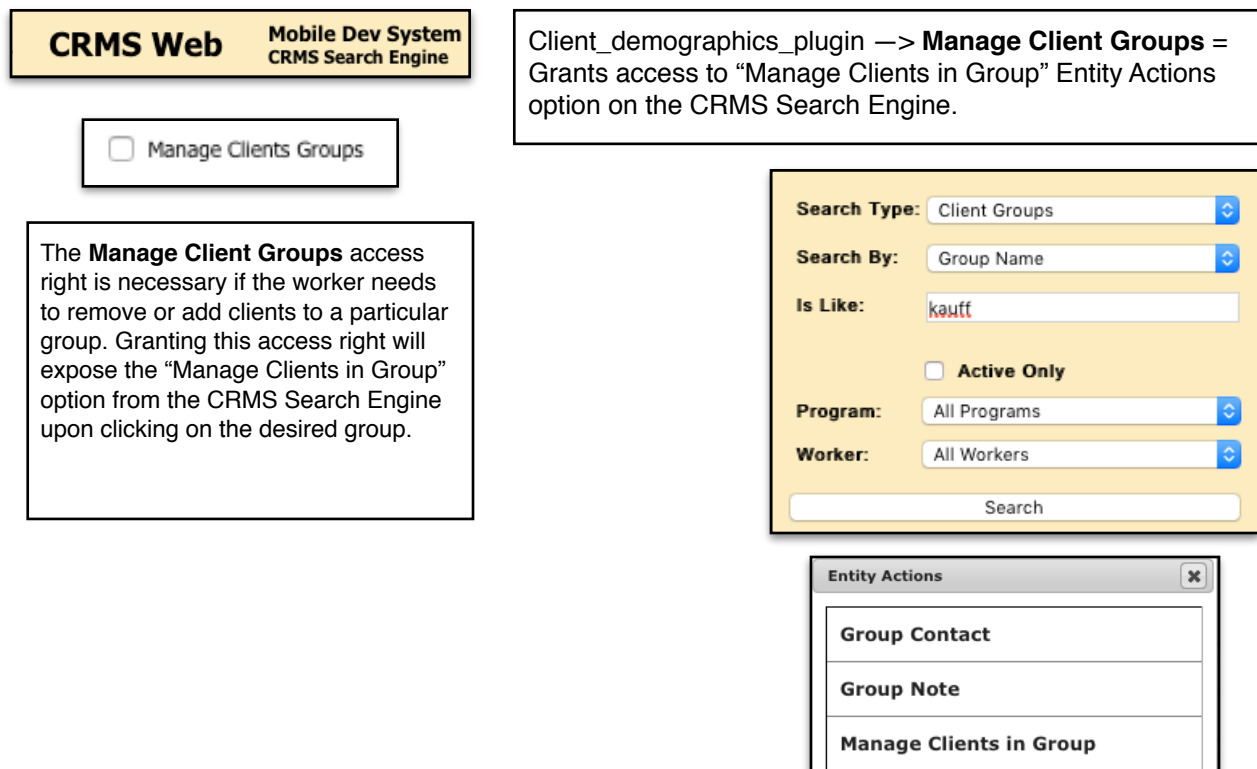


Figure 623 - Manage Client Groups Access Right

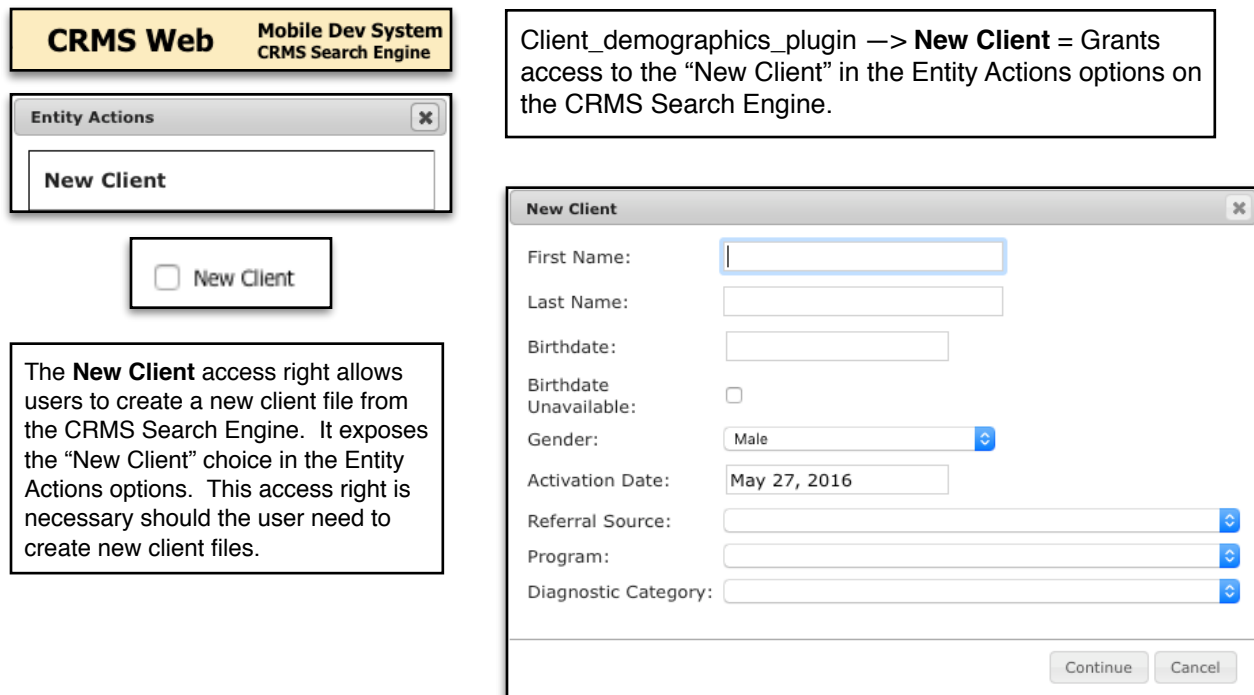


Figure 624 - New Client Access Right

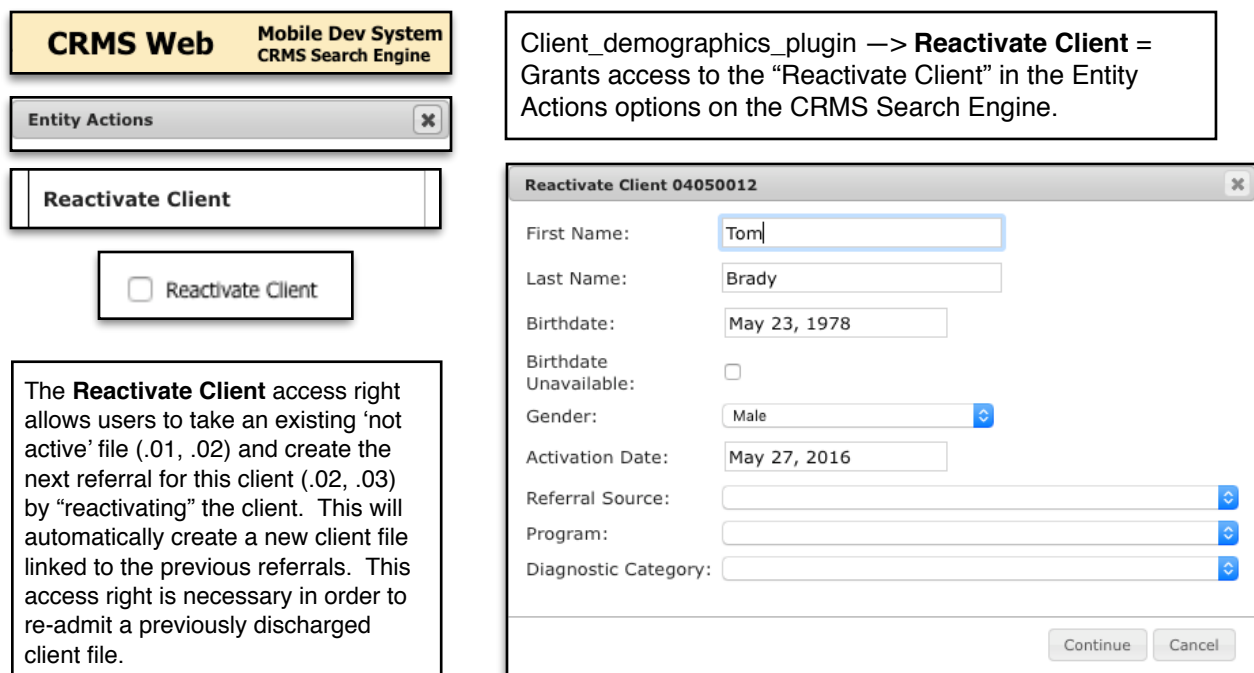


Figure 625 - Reactivate Access Right

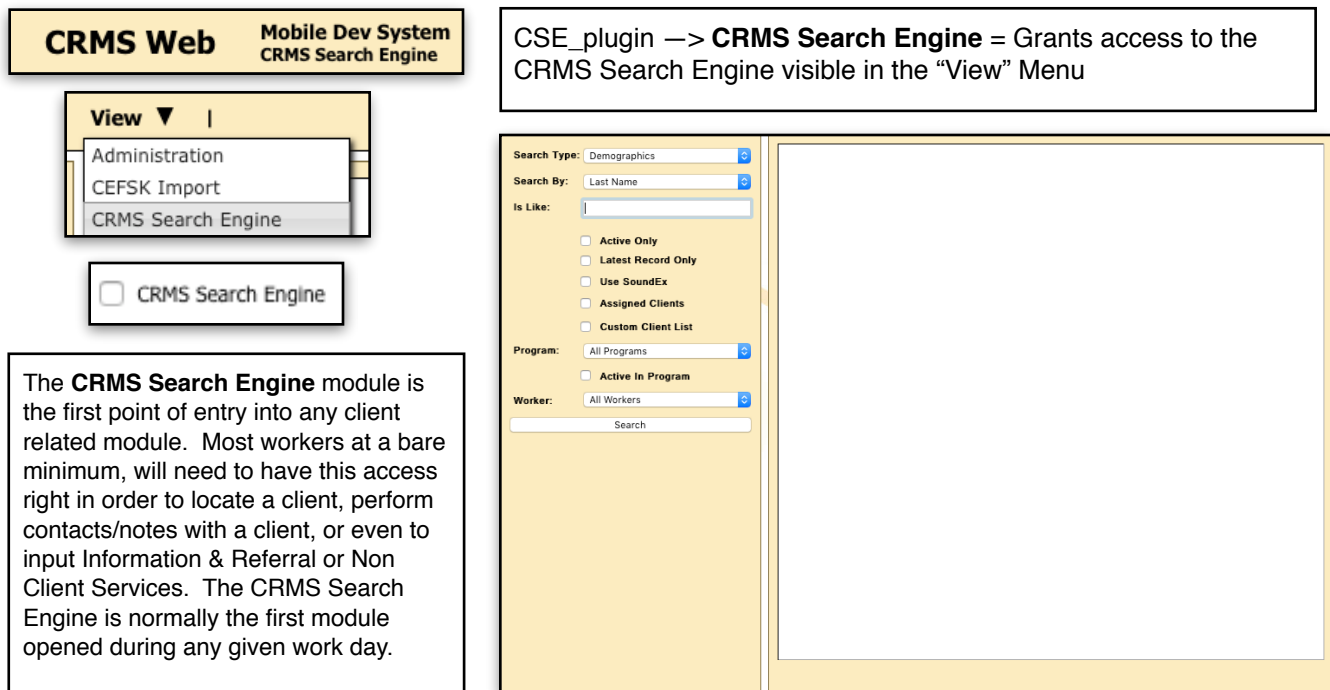


Figure 626 - CRMS Search Engine Access Right

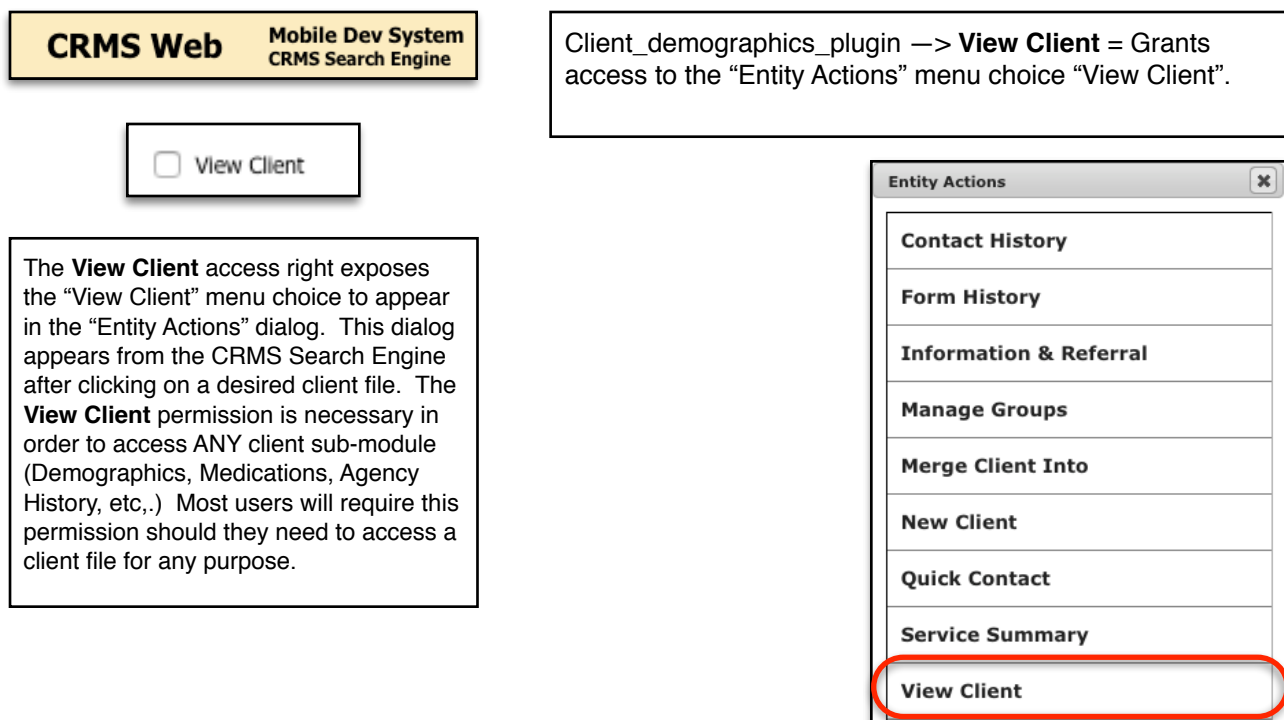


Figure 627 - View Client Access Right

Demographics

☐ Demographics Page

The **Demographics** page is normally given to all users. This page is necessary in order to create a client file as it contains the base demographic information such as first name, last name, DOB, gender, phone numbers, as well as Address Information. A user can also record the clients physical picture (if module is activated). Users can be given a 'read only' access right to this page if necessary to prevent unwanted updates.

Client_demographics_plugin —> **Demographics Page** = Grants access to the Demographics page located within the Client Chart.

The screenshot shows the Demographics page form for a client named Alex Kauffman. The form is divided into several sections. The top section contains fields for First Name (Alex), Middle Name, Alias, Last Name (Kauffman), Date of Birth (May 06, 1976, 40 years), Gender (M), Marital Status, Bilingual (Yes), Aboriginal Origin, Health Card, Health Card Expiry, Issuing Territory (ON), Status Number, SIN, and Culture. There are also checkboxes for 'DOB Unavailable', 'DOB Estimate', and 'Non Registered Client'. The bottom section contains fields for First Nation, First Nation Affiliation, First Nation Status, Home Phone, Work Phone, Alternate Phone, and Email. There are also checkboxes for 'Unknown', 'No Messages', and 'Permission to Contact'.

Figure 628 - Demographics Page Access Right

Agency History

☐ Agency History Page

The **Agency History** page is where users input new programs/referrals for a client. All wait list calculations are driven from this module. Baseline and Current CDS Data are inputted on this module. This module provides the user with an overview of the services the client is receiving, along with their baseline data when they were admitted into the organization.

Client_demographics_plugin —> **Agency History Page** = Grants access to the "Agency History Page" located within the Client Chart.

The screenshot shows the Agency History page for a client named Alex Kauffman (04055415-02) - Active. The page has a sidebar on the left with a 'Back' button and a list of 'Additions' and 'Case Management' items. The main content area contains a form for 'Referral Source' (Community Mental Health Agency), 'Referred By', 'Address', 'Phone', 'Email', 'Activation Date' (May 03, 2016), 'Diagnostic Category' (Anxiety Disorder), 'Reason for Initial Referral into agency', 'Age of onset for mental illness' (NA), 'Age of first hospitalization' (NA), 'Common Data Set Evaluation', 'MIS Exit Status', 'MIS Exit Date', and a checkbox for 'Client consents to receive the CARE TRANSITIONS MEASURE SURVEY'.

Figure 629 - Agency History Page Access Right

Consent Summary

☐ Consent Summary Page

The **Consent Summary Page** allows users to input any written, verbal or other types of consents. Users can input the person for whom the consent is for, their contact information, expiration date (if applicable) and the description of the consent/restrictions. Users can also digitally attach any scanned and signed consent forms directly to the consent record.

Client_demographics_plugin —> **Consent Summary Page** = Grants access to the Consent Summary page located within the Client Chart.

CURRENT RELEASES EXIST

Type:

Date:

Consent To:

Expiry Date:

Contact:

☐ Never Expires

Revoke Date:

Description of Consent/Restrictions:

Admission	Type	Initiated	Expired	Revoked	Consent To	File Name
2	Verbal	18-May-2016	18-May-2017		Dr. Jones	

☐ Show for all admissions

Figure 632 - Consent Summary Page Access Right

CDS History

☐ Common Data Set History Page

The **CDS History Page** allows users to quickly and efficiently review the baseline and current CDS data for a particular CDS value, and a particular program. As the Agency History Page only displays the clients' baseline CDS data into that program, users can use this module for a quick review. Users can also end date legal statuses and CRMS Administrators can also delete incorrectly inputted CDS values if necessary.

Client_demographics_plugin —> **Common Data Set History Page** = Grants access to the CDS History page located within the Client Chart.

Description:

Program:

Figure 633 - Common Data Set History Page Access Right

CRMS Web

Mobile Dev System
Client Chart

Education

☐ Education

The **Education** page records additional information above and beyond what is captured in the CDS Baselines. Users can document the education status, facility and additional data points regarding their current education status.

Client_demographics_plugin —> **Education** = Grants access to the Education Page located within the Client Chart.

Disposition Date:

Educational Status:

Educational Facility:

☐ Formally Enrolled in Course(s)
☐ Working Towards Degree / Certificate

☐ Continuation of Extended Program
☐ Not Interested

Hours Per Week:

☐ Client Successfully Completed Program
☐ Client Successfully Completed Course(s):

Date Started:

Date Completed / Terminated:

Comments:

Date	Education Status	Education Facility
2016-05-18	College Graduate	St. Lawrence College

☐ Show All Admissions

Figure 634 - Education Access Right

CRMS Web

Mobile Dev System
Client Chart

ER Visits

☐ ER Visits

The **ER Visits** page allows users to document additional information regarding Emergency Room Visits above and beyond what is already captured in the CDS Baseline Data. Users can input the hospital, city, additional medical data points regarding their ER Visit and comments.

Client_demographics_plugin —> **ER Visits** = Grants access to the ER Visits Page located within the Client Chart.

Date:

Province:

City:

Hospital:

☐ Psychiatric
☐ Medical

☐ Substance Abuse
☐ Other

☐ Unscheduled

Stayed overnight in holding bed:

☐ Yes
☐ No

Led to Hospital Admission:

☐ Yes
☐ No

Comments

Admission	Date	Hospital
2	19-May-2016	Kingston General Hospital

☐ Show for all admissions

Figure 635 - ER Visits Access Right

Employment

☐ Employment Page

The **Employment Page** allows users to input additional information above and beyond what is captured in the CDS Baselines. Users can document more detailed employment information such as the wage, average hours, employer name, address information, and comments.

Client_demographics_plugin —> **Employment Page** = Grants access to the Employment Page located within the Client Chart.

Disposition Date:
Employment Status:
Hourly Wage:
Average Hours:
Income Support:
Frequency:
Income (\$):
Employer Name:
Address:
City:
Province:
Postal Code:
Start Date:
Termination Date:
Reason For Termination:
Comments:

☐ Disclosure SMI
☐ Health Insurance
☐ Primary Employer

Date	Employment Status	Employer	Start Date	End Date
2016-05-19	Employed / Self Employed - Full Time	CTSI Incorporated	2007-02-07	

☐ Show for All Versions

Figure 636 - Employment Access Right

☐ Goal Attainment Scale Page

Goals

The **Goals** Page allows users to create custom goals for their clients and perform periodical reviews when necessary. This can be used to make a goal plan for the client in order to better serve them. CRMS Administrators can also extensively customize this module to save workers time by not having to type their desired “Outcomes” each time.

Client_demographics_plugin —> **Goal Attainment Scale Page** = Grants access to the Goals page located within the Client Chart.

Back
Quit Smoking

Kauffman, Alex (04055415-02) - Active

Disposition Date:
Template:
Program:
Template Type:
Goal:
Domain:
Review Date:
Active
Achieved
Action Plan:

Most Favourable (2)
Complete abstinence and daily attendance in support groups

More than Expected (1)
Abstains from use and occasionally attends support group meetings

Expected (0)
Abstains from substance use, but doesn't attend group meetings

Less than Expected (-1)
Attempts to abstain but continues to use substances

Most Unfavourable (-2)
Uses substances on a regular basis, no attempt to abstain

Date	Level	Worker
2016-05-20	-1	Christian Gosselin

New Review
Edit Review

Figure 637 - Goal Attainment Scale Page Access Right

Hospitalizations

☐ Hospitalizations

The **Hospitalizations** page allows users to input additional hospitalization information above and beyond what is already captured in the CDS Baseline Data. These statistics will effect the Baseline/ Current Psychiatric Hospitalization Report should the user check off "Mental Illness Related".

Client_demographics_plugin —> **Hospitalizations** = Grants access to the Hospitalizations page located within the Client Chart.

Disposition Date:
Status:
Institution:
Date Hospitalized:
Date Discharged:

☐ Mental Illness Related

☐ Approximate
☐ Approximate

☐ Voluntary
☐ Involuntary
☐ Substance abuse related

☐ Forensic Related
☐ Respite
☐ Medical Related

Shared Crisis Emerg. Time:

Comments:

Admission	Hospitalized	Discharged	Status	Institution
2	19-May-2016		Admitted to Medical Hospital	Kingston General Hospital

☐ Show for all admissions

Figure 638 - Hospitalizations Access Right

Incarcerations

☐ Incarcerations

The **Incarcerations** page allows users to document additional information above and beyond what is already captured in the CDS Baseline Data. Court Diversion Programs might use this module to record more detailed information regarding a clients' incarcerations.

Client_demographics_plugin —> **Incarcerations** = Grants access to the Incarcerations page located within the Client Chart.

Disposition Date:
Incarceration Status:
Facility:

☐ Psychiatric Related
☐ Substance Abuse Related

Address:
City:
Cell Number:

Contact:
Incarceration Date:
Release Date:

☐ Approximate
☐ Approximate

Admission	Disposition Date	Status	Incarceration Date	Release Date
2	19-May-2016	Incarcerated	19-May-2016	

☐ Show for all admissions

Figure 639 - Incarcerations Access Right

Medications

☐ Medications

The **Medications** page allows users to document any medications the client might currently be taking. Users can input the medication and dosage, along with a frequency and notes. Users can also input any medication allergies a client might have. There is also a basic Medication Reconciliation module within the Medication page.

Client_demographics_plugin --> **Medications** = Grants access to the Medications page located within the Client Chart.

Medication Details

Medication Reconciliation

Created:

Last Updated:

Expires:

Prescription Start Date:

Stop Date:

Medication & Dosage:

Frequency:

Notes:

Pharmacy:

☒ Critical

Governed by Medical Administration Board:

☐ Yes ☐ No

Reason Unprescribed:

Medication Allergies:

Date	Medication & Dosage
2016-05-19	tylenol - 300 mg
2016-05-19	EXTRA STRENGTH TYLENOL SINUS PAIN AND CONGESTION NIGHTTIME - 02268310

Show All

Figure 640 - Medications Access Right

Other Illness

☐ Other Illnesses

The **Other Illnesses** page records additional illness information which is not captured in any other CRMS module. The Other Illnesses module collects information such as concurrent disorders, dual diagnoses, other chronic illnesses, allergies, cognitive issues, forensic, initiatives, legal history, mobility / physical / complex needs, physical health, seizures and a summary. There are some CDS mandated fields in this module, however by default the software has flagged these as 'Unknown' for the worker.

Client_demographics_plugin --> **Other Illnesses** = Grants access to the Other Illness page within the Client Chart.

Concurrent Disorder

Disposition Date: 2016-05-03

Details:

Dual Diagnosis

Disposition Date: 2016-05-03

Details:

Other chronic illnesses

Disposition Date: 2016-05-03

Details:

Allergies

Disposition Date: 2016-05-19

Details: Allergic to cats and latex.

Cognitive Issues

Admission	Date	Name	Status
2	19-May-2016	Allergies	Yes

Show for all admissions

Figure 641 - Other Illnesses Access Right

Prescriptions

☐ Prescriptions

The **Prescriptions** page allows users to record any prescriptions the client is currently taking. This module varies slightly from the Medications module. It was created exclusively to track Prescriptions. Both the Prescriptions and Medications module are linked together for the 'Medication Reconciliation' Module. Users can input the doctor whom prescribed the prescription, medication and dosage, frequency, quantity, repeat quantity, start and discontinue dates along with a comment.

Client_demographics_plugin —> **Prescriptions** = Grants access to the Prescriptions page within the Client Chart.

Date	Medication	Dosage	Freq	Qty	Repeat
------	------------	--------	------	-----	--------

Doctor:

Medication Name:

Dosage:

Frequency:

Prescription Date:

Quantity:

Repeat Quantity:

Discontinued:

Re-Order:

Comment:

Medication Name Filter:

Timestamp	Saved By	Doctor	Prescription Date	Re-order	Discontinued	Medication	Frequency	Quantity
-----------	----------	--------	-------------------	----------	--------------	------------	-----------	----------

Figure 642 - Prescriptions Access Right

Risk Factors

☐ Risk Factors Page

The **Risk Factors** page allows users to document any risk factors pertinent to this client. This is where the user would flag the client as a 'Red Flag' or a 'Moderate Flag' client. The Risk Factors grid choices are also dynamic, meaning a CRMS Administrator can customize the Risk Factors choices as necessary for this agency. The Risk Factors page also keeps a historical list of all the changes made to the clients' Risk Factors.

Client_demographics_plugin —> **Risk Factors Page** = Grants access to the Risk Factors page within the Client Chart.

Red Flag

Moderate Flag

Harm to Self

Harm to Others

Inability to Care for Self

Financially Incapable

Legal Issues

Substance Abuse

Serious Medical

Other Risks

?

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Admission	Date	Worker	Name	Value	Details
2	19-May-2016	Christian Gosselin	Legal Issues	Yes	Has legal issues for addictions related activities...

☐ Show for all Admissions

Figure 643 - Risk Factors Access Right

☐ Save

The **Save** access right allows users to save changes made to a clients' chart. This access right is crucial should the user have to perform demographics update, open a new program for the client, etc. Should the user not have this permission, they will be unable to save on any of the modules located within the Client Chart.

Client_demographics_plugin —> **Save** = Grants the user the ability to save changes within the Client Chart.

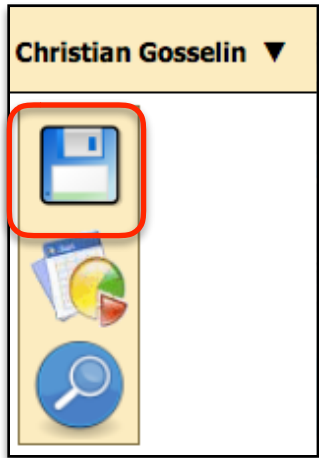


Figure 644 - Save Access Right

Service Summary

☐ View Service Summary

The **Service Summary** access right allows users to quickly review all the services the client is currently receiving, along with if they have any consents in the "Consent Summary" module. The Service Summary module also displays the last contact which occurred with the client. This module can be extremely handy for rapid review of a clients' file. A receptionist can be given this access right in order to quickly direct phone calls to the appropriate worker.

Client_demographics_plugin —> **Service Summary** = Grants access to the "Service Summary" in the Entity Actions options on the CRMS Search Engine.

Service Summary - Kauffman, Alex (4055415)						
Program	Worker	Pending Assessment	Intake Assessment	Un-Pending	Entry	Exit
Case Management	Christian Gosselin	2016-05-03	2016-05-18		2016-05-26	
Addictions	Christian Gosselin	2016-05-11				
CURRENT RELEASES EXIST						
Last Contact: None						

Figure 645 - Service Summary Access Right

☐ Deactivate Client

The **Deactivate Client** access right allows users to “discharge” the client from the agency once all their services are completed. The “Discharge Client” prompt will only appear once all services have either been exited, or un-pended, and the MIS Exit Status and MIS Exit Date have been inputted. Should all these criteria be met, and the user have the access right, the prompt will be made visible.

Client_demographics_plugin —> **Deactivate Client** = Grants access to the “Discharge Client” prompt on the Agency History module.

Figure 646 - Deactivate Client Access Right

Entity Actions

Add to Custom Client List

Remove from Custom Client List

☐ Manage Custom Client List

The **Manage Custom Client List** access right allows users to add any client to their own “Custom Client List”. Each worker is assigned their own unique “Custom Client List”. Users can add and remove as necessary. This “Custom Client List” can be used in other modules of CRMS.

Client_demographics_plugin —> **Manage Custom Client List** = Grants access to the “Add/Remote” from Custom Client List on the CRMS Search Engine.

Figure 647 - Manage Custom Client List Access Right

Christian Gosselin ▼

MyAssistant

Task Pane

☐ MyAssistant

The **MyAssistant** module is the internal messaging system within CRMS. It allows for secure communications amongst CRMS users. As the system is PHIPA compliant, users can discuss client confidential issues in a safe and secure manner. The MyAssistant also allows users to send messages with client charts' embedded directly within the message. Users can also message an entire team if necessary.

Client_demographics_plugin —> **MyAssistant** = Grants access to the “MyAssistant” module located inside the “User” drop down.

Showing

Christian Gosselin's New Me

Get Messages

Write

Reply

Forward

From

All Users

Search

From:

Attachments:

To:

Sent:

Received:

Order By

Date Descending

Figure 648 - MyAssistant Access Right

☐ Crisis Call Module

The **Crisis Call Module** access rights allows users to document crisis calls either with registered CRMS clients, or non-registered ‘crisis’ clients. CRMS Administrators can then retroactively merge crisis clients with a registered CRMS client should the need arise. Otherwise workers can continue to document crisis calls with the non-registered client. All statistics are accrued in the “Worker Summary”.

Crisis_plugin —> **Crisis Call Module** = Grants access to the “Crisis Calls” Search Type from the CRMS Search Engine.

Search Type:

Crisis Calls

Search By:

Call ID

Is Like:

Start Date:

May 27, 2010

End Date:

May 27, 2016

Program:

All Programs

Worker:

All Workers

Search

Crisis Call ID:	0000153	Client:	Barker, Bob (CRMS-04050013)
Call Date:	January 22, 2016	Call Status:	
Call Time:	14:00:00 EST to 14:50:00 EST	Program:	Crisis
Worker:	Christian Gosselin		
Crisis Call ID:	0000152	Client:	Wohlberg, Kally (CRMS-04050519)
Call Date:	December 14, 2015	Call Status:	Normal
Call Time:	09:45:00 EST to 10:05:00 EST	Program:	Case Management
Worker:	Christian Gosselin		
Crisis Call ID:	0000151	Client:	Allen, Ethan (CRMS-04050143)
Call Date:	July 10, 2015	Call Status:	
Call Time:	10:17:00 EDT to 10:19:00 EDT	Program:	Case Management
Worker:	Denis Lahale		
Crisis Call ID:	0000150	Client:	Duck, Donald (CRMS-04050018)
Call Date:	July 10, 2015	Call Status:	Normal
Call Time:	10:04:00 EDT to 10:13:00 EDT	Program:	Crisis
Worker:	Denis Lahale		
Crisis Call ID:	0000149	Client:	Cousin, Gregory (CRMS-04050259)
Call Date:	July 10, 2015	Call Status:	Normal
Call Time:	09:21:00 EDT to 09:25:00 EDT	Program:	Case Management
Worker:	Denis Lahale		
Crisis Call ID:	0000147	Client:	Brady, Frank (CRMS-04050016)
Call Date:	May 5, 2015	Call Status:	
Call Time:	15:30:00 EDT to 15:35:00 EDT	Program:	Case Management
Worker:	Christian Gosselin		
Crisis Call ID:	0000146	Client:	Brady, Frank (CRMS-04050016)
Call Date:	May 5, 2015	Call Status:	
Call Time:	15:20:00 EDT to 15:45:00 EDT	Program:	Case Management
Worker:	Christian Gosselin		

Showing 80 calls

Figure 649 - Crisis Call Module Access Right

Client_demographics_plugin—> **Toggle Client** = Grants access to make modifications to a ‘Not Active’ Client Chart.

Entity Actions

Toggle Client

☐ Toggle Client

Brady, Tom (04050012-02) - Not Active

First Name:

Tom

Middle Name:

Alias:

Last Name:

Brady

Date of Birth:

May 23, 1978

38 years

DOB Unavailable

☐

Marital Status:

Bilingual:

Yes

Aboriginal Origin:

Health Card:

Health Card Expiry:

Issuing Territory:

ON

The **Toggle Client** access right allows users to make updates or modifications to a file which has been designated a ‘Not Active’ state. ‘Not Active’ clients are in a read only mode and modifications are prevented. A user can ‘toggle’ the client to temporarily unlock the chart, allowing them to make a minor correction if necessary such as an address update.

Figure 650 - Toggle Client Access Right

CRMS Web

Mobile Dev System
Form History

Entity Actions

Form History

☐ Forms

Chart_plugin —> **Forms** = Grants access to the “Forms History” Entity Actions options located on the CRMS Search Engine.

The **Forms** access rights is necessary for any users which needs to review or create new case notes / forms. A user might be able to create new notes / forms using the Quick Contact module, however they won’t be able to make amendments and corrections should they not have this access right. Most users will have this access right in order to create documentation within a client chart.

Search...

May 25 2016 Progress Note

Program: Addictions

Focus:

Worker: Christian Gosselin

May 25 2016 Progress Note

Program: Case Management

Focus:

Worker: Christian Gosselin

Showing 2 Items

Kauffman, Alex (04055415-02)

Figure 651 - Forms Access Right

CRMS Web

Mobile Dev System

Form History

Entity Actions

Form History

Forms v2

The **Forms v2** access right allows the user to view the Forms History in a redesigned fashion. The module has been designed based on feedback received from CRMS Users. The interface provides a cleaner more efficient way to review case notes. NOTE - BOTH the “Forms v2” and “Forms History” access right must be granted to enable this feature.

Chart_plugin —> **Forms v2** = Grants access to redesigned Forms History module.

Azulay, Nanci (00000122.01)

Incident date is between:

Created date is between:

Focus:

Search:

Program:

Worker:

Type:

Search

Clear

New

Incident Date	Type	Creation Date		Program	Worker
Apr 8 2016	Progress Note	Apr 8 2016 3:38 PM	Read Only	Additions	Marko Palikko
Apr 1 2016	Progress Note	Apr 1 2016 2:07 PM	Read Only	Case Management	Marko Palikko
Mar 31 2016	Progress Note	Mar 31 2016 9:44 AM	Read Only	Case Management	Bob Fehir
Mar 31 2016	Progress Note	Mar 31 2016 9:39 AM	Read Only	Case Management	Marko Palikko
Mar 22 2016	Contact Note	Mar 22 2016 4:09 PM		Case Management	Marko Palikko
Mar 22 2016	Contact Note	Mar 22 2016 4:06 PM		Case Management	Marko Palikko
Mar 22 2016	Contact Note	Mar 22 2016 3:51 PM		Case Management	Marko Palikko
Mar 22 2016	Contact Note	Mar 22 2016 3:46 PM		Case Management	Marko Palikko
Mar 22 2016	Contact Note	Mar 22 2016 3:41 PM		Case Management	Marko Palikko
Mar 22 2016	Progress Note	Mar 22 2016 4:15 PM	Read Only	Case Management	Marko Palikko
Mar 22 2016	Progress Note	Mar 22 2016 4:11 PM	Read Only	Case Management	Marko Palikko
Mar 22 2016	Progress Note	Mar 22 2016 4:10 PM	Read Only	Case Management	Marko Palikko
Mar 21 2016	Progress Note	Mar 21 2016 3:42 PM		Case Management	Marko Palikko
Mar 21 2016	Progress Note	Mar 21 2016 3:41 PM		Case Management	Marko Palikko
Mar 21 2016	Progress Note	Mar 21 2016 2:04 PM		Case Management	Marko Palikko
Mar 21 2016	Progress Note	Mar 21 2016 2:02 PM		Case Management	Marko Palikko
Mar 21 2016	Progress Note	Mar 21 2016 2:00 PM		Case Management	Marko Palikko

Showing 183 Items

Figure 652 - Forms v2 Access Right

CRMS Web

Mobile Dev System

Group Note

Entity Actions

Group Note

Group Form

The **Group Form** access right allows users to perform documentation with an existing client group. Users can rapidly document for multiple clients using this module. NOTE - This access right is different than the “Group Contact” access right. A CRMS Administrator might chose to give one or the other, or both to a particular user group.

Chart_plugin —> **Group Form** = Grants access to the “Group Note” Entity Actions options when utilizing the “Groups” module located within the CRMS Search Engine.

Search

Brady, Tom

04050012-01

Brady, Tom

04050012-02

Colbert, Stephen

04050133-01

Johnson, Naomi

04050014-01

Moe, Colby

04050242-01

Wohlberg, Kaily

04050519-01

Showing 6 Clients

Anger Management - Case Management

Figure 653 - Group Form Access Right

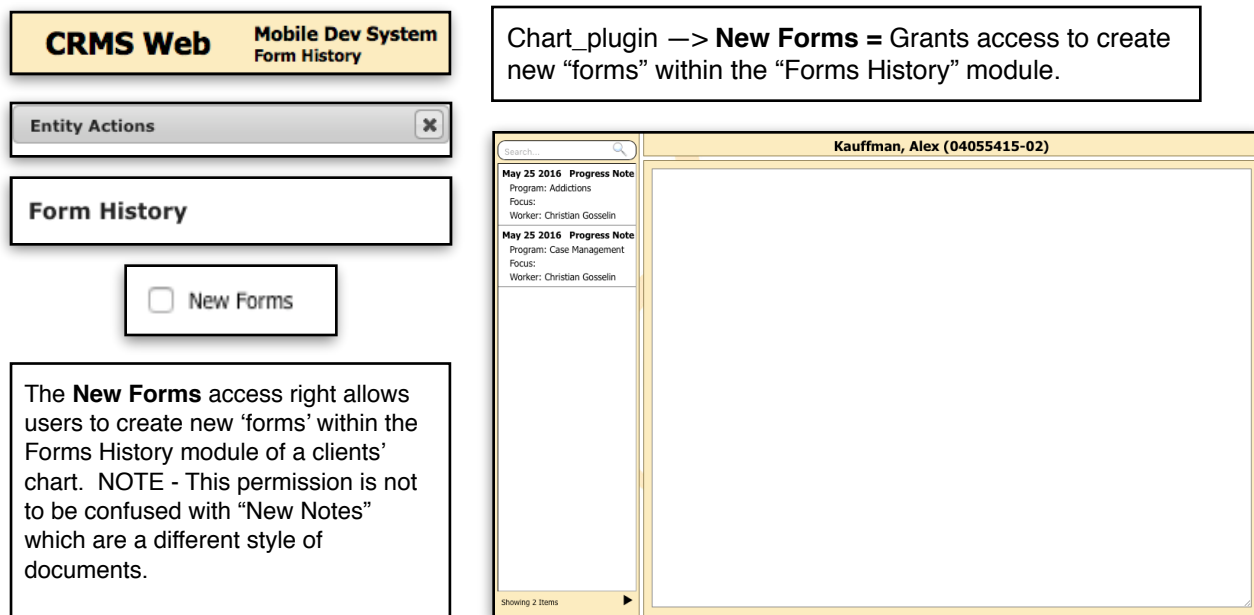


Figure 654 - New Forms Access Right

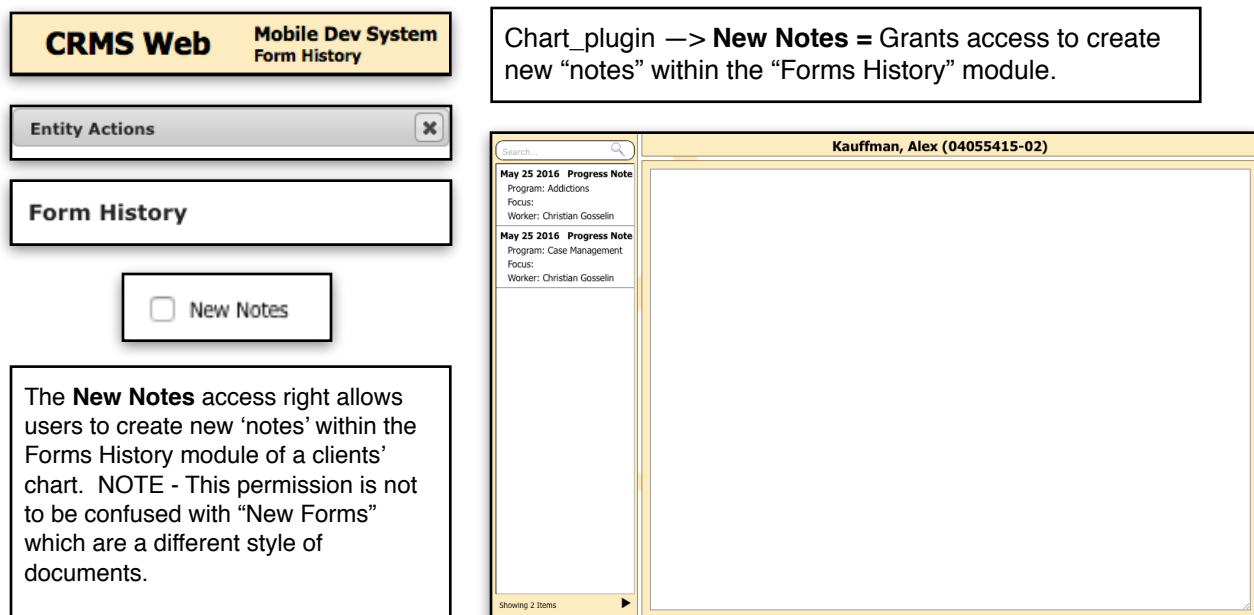


Figure 655 - New Notes Access Right

☐ Edit Forms

The **Edit Forms** access right allows users to modify / edit “forms” which have been previously saved in the client chart.

NOTE - This access right DOES NOT allow the user to modify another workers forms, just their own. NOTE - This permission is not to be confused with “Edit Notes” as those are different style of documents.

Chart_plugin —> **Edit Forms** = Grants access to modify / edit “forms” within the “Forms History” module.

Search...

May 25 2016

Progress Note

Program: Addictions

Focus:

Worker: Christian Gosselin

May 25 2016

Progress Note

Program: Case Management

Focus:

Worker: Christian Gosselin

Showing 2 Items

Kauffman, Alex (04055415-02)

Figure 656 - Edit Forms Access Right

☐ Edit Notes

The **Edit Notes** access right allows users to modify / edit “notes” which have been previously saved in the client chart.

NOTE - This access right DOES NOT allow the user to modify another workers notes, just their own. NOTE - This permission is not to be confused with “Edit Forms” as those are different style of documents.

Chart_plugin —> **Edit Notes** = Grants access to modify / edit “notes” within the “Forms History” module.

Search...

May 25 2016

Progress Note

Program: Addictions

Focus:

Worker: Christian Gosselin

May 25 2016

Progress Note

Program: Case Management

Focus:

Worker: Christian Gosselin

Showing 2 Items

Kauffman, Alex (04055415-02)

Figure 657 - Edit Notes Access Right

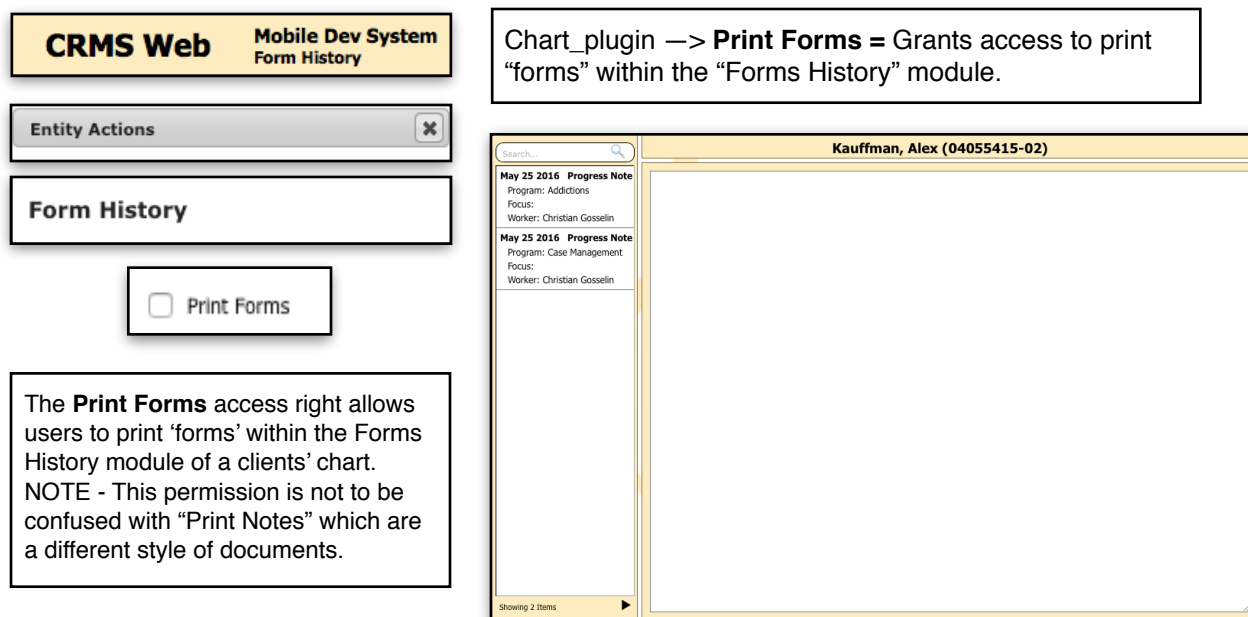


Figure 658 - Print Forms Access Right

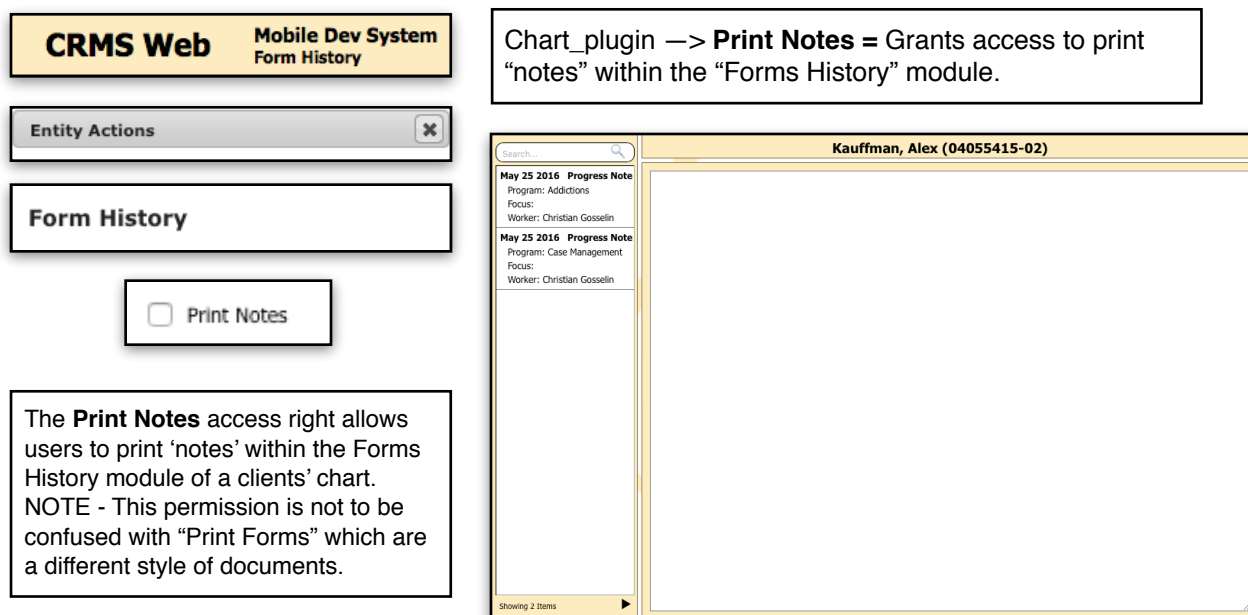


Figure 659 - Print Notes Access Right

☐

Contacts

The **Contacts** access right is necessary for any users which will be documenting ‘contacts’, either face to face or telephone interactions with a service recipient. Note that this access right does not give the user access to the Quick Contact Dialog. That is a separate access right. The **Contacts** access right will be necessary should the user need to modify previously saved contacts to make corrections.

Contact_plugin —> **Contacts** = Grants access to the “Contact History by Worker” Search Type on the CRMS Search Engine.

Search Type: Contact History by Worker

Start Date: May 27, 2016

End Date: May 27, 2016

Program: All Programs

Worker: All Workers

Search

Figure 660 - Contacts Access Right

Entity Actions

Group Contact

☐

Group Contact

The **Group Contact** access right is necessary should the user perform contacts with groups. A user can be given access solely to the group contact, or group case note feature, or both. The Group Contact allows users to create the same interactions across multiple clients in a quick efficient manner. Note that this access right is not to manage the groups, or create the groups, but exclusively to create ‘contacts’ with groups.

Contact_plugin —> **Group Contact** = Grants access to the “Group Contact” Entity Action option off the CRMS Search Engine when utilizing the “Groups” module.

Group Contact

Colbert, Stephen (0405013)

Johnson, Naomi (0405001)

Moe, Colby (04050242.01)

Wohlberg, Kally (04050515)

Contact Date: May 27, 2016

Time: 09:00

Program: Case Management

Worker: Christian Gosselin

Modality:

Contact Location: School

Issue Type:

Office Location: Oak Centre

Indirect

Secondary Worker

Participants:

Individual

Group

Police

Doctor

Lawyer

Non Registered

Non Reg.: 0

0.00 hours

Focus: Appointments

Note:

Active Only

Save Cancel

Figure 661 - Group Contact Access Right

290

|

CRMS SOFTWARE

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CRMS Web

Mobile Dev System
CRMS Search Engine

Entity Actions

Quick Contact

☐ Quick Contact

The **Quick Contact** access right allows users to rapidly enter contacts / case notes in one efficient module. The Quick Contact module is located on the CRMS Search Engine upon clicking on the desired client. CRMS Administrators can configure a note template to be utilized with the Quick Contact module.

Contact_plugin —> **Quick Contact** = Grants access to the “Quick Contact” Entity Action option off the CRMS Search Engine.

Quick Contact - Kauffman, Alex (4055415)

Contact Date: May 27, 2016

Time: 09:00

Program:

Worker: Christian Gosselin

Modality:

Contact Location: School

Issue Type:

Office Location: Oak Centre

☐ Indirect
 ☐ Secondary Worker

Participants:

☒ Individual
☐ Group
☐ Police
☐ Doctor
☐ Lawyer
☐ Non Registered

Non Reg.: 0

0.00 hours

Focus:

Note:

Save

Cancel

Figure 662 - Quick Contact Access Right

CRMS Web

Mobile Dev System
CRMS Search Engine

Entity Actions

Quick Contact

☐ Enable Quick Note

The **Enable Quick Note** enables the “Note” field on the Quick Contact Dialog. CRMS Administrators can choose not to grant this access right, should the user want to do solely contacts without the associated case note. However most agencies utilize this access right in conjunction with the “Quick Contact” access right in order to provide users with the most efficient mechanism to document contacts / case notes.

Contact_plugin —> **Enable Quick Note** = Grants access to the “Note” field on the Quick Contact Dialog located off the CRMS Search Engine.

Quick Contact - Kauffman, Alex (4055415)

Contact Date: May 27, 2016

Time: 09:00

Program:

Worker: Christian Gosselin

Modality:

Contact Location: School

Issue Type:

Office Location: Oak Centre

☐ Indirect
 ☐ Secondary Worker

Participants:

☒ Individual
☐ Group
☐ Police
☐ Doctor
☐ Lawyer
☐ Non Registered

Non Reg.: 0

0.00 hours

Focus:

Note:

Save

Cancel

Figure 663 - Enable Quick Note Access Right

☐ Information & Referral

The **Information & Referral** module allows users to document interactions either face to face or telephone with both non-registered service recipients, or a registered CRMS client. These statistics can be used for proposal building purposes to demonstrate a need in your community for a particular type of service. Several agencies give access to this module to their receptionists to track incoming phone requests.

Contact_plugin --> **Information & Referral** = Grants access to the Search Type "Information & Referral".

Search Type: Information & Referral

Start Date: May 25, 2016

End Date: May 25, 2016

Program: All Programs

Worker: All Workers

Search

Date	Time	Worker	Client	Duration	Program	Contact Type	Reason

Figure 664 - Information & Referral Access Right

☐ Non Client Services

The **Non Client Services** module allows users to document any time spent performing other activities not related to clients. Activities such as staff time, meetings, documentation, travel time, or compensation, vacation, bereavement, lieu time can all be documented in Non Client Services. Users can also input their daily scheduled hours into the system. Agencies utilize this module when performing true workload measurement.

Contact_plugin --> **Non Client Services** = Grants access to the Search Type "Non Client Services".

Search Type: Non Client Services

Start Date: May 26, 2016

End Date: May 26, 2016

Type Filter: Staff Time

Worker: All Workers

Search

Date	User	Activity	Time

Figure 665 - Non Client Services Access Right

☐ Worker Summary Pane

The **Worker Summary Pane** access right allows users to review the ‘time’ they have inputted into CRMS using either the Contact/Quick Contact module, Non Client Services, Information & Referral, or Crisis Call Module. The time is totalled and the user can select their desired date range to review across a week or a month. NOTE - A user will also require the “application —> Task Pane” access right in order for the “Worker Summary” to appear.

Contact_plugin —> **Worker Summary Pane** = Grants access to the “Worker Summary” drop down choice located within the “Task Pane” on the CRMS Search Engine.

Christian Gosselin

Worker Summary

From: May 01, 2016
To: May 27, 2016

Compensation	Total Time (min):	Count:
Direct Face to Face	60	1
Direct Other	0	0
Direct Telephone	0	0
Indirect	0	0
Information & Referral	20	1
Staff Time	0	0
Summary	Total Time (min): 80	Total Time (hrs): 1.33
		Count: 2

Figure 666 - Worker Summary Pane Access Right

☐ Workflow Viewer

The **Workflow Viewer** access right allows users to view any mandatory data they have yet to input into CRMS. CRMS Administrators can customize their Workflow on an agency level, as well as an individual program level. The Workflow System then calculates what the worker has missed from those fields using their delegated case load. This system can be used a reminder based system for tasks that must be completed.

Workflow_plugin —> **Workflow Viewer** = Grants access to the “Workflow” Task Pane located under the “user name”.

Workflow

Azulay, Nanci (00000122-01)
Consent - North Bay Police Co
Consent - OPP Consent
Consent - Verbal
Consent - Written

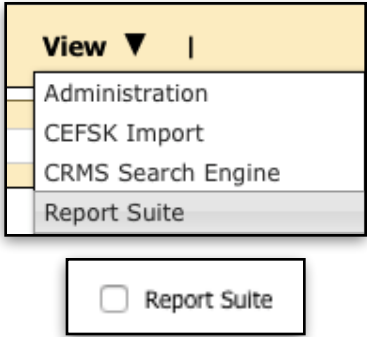
Barker, Bob (04050013-01)
Consent - North Bay Police Co
Consent - OPP Consent
Consent - Verbal
Consent - Written
County
Health Card
Hospital Chart Number
LHIN

Brady, Frank (04050016-01)
Aboriginal Origin
Address
Consent - North Bay Police Co
Consent - OPP Consent
Consent - Verbal
Consent - Written
County
Health Card
Hospital Chart Number
LHIN
Marital Status

Charlie, Thomas (04050193-01)
Activation Date
Consent - North Bay Police Co
Consent - OPP Consent
Consent - Verbal
Consent - Written

Colbert, Stephen (04050133-01)
Consent - North Bay Police Co

Figure 667 - Workflow Viewer Access Right



The **Report Suite** access right allows users to run reports for which they have also been granted access to. Granting this access right to the user allows them to access the Report Suite. It DOES NOT mean they can run a report. Report by report access rights must be granted to a 'User Group' in order for the user to view any reports.

ReportSuite_plugin —> **Report Suite** = Grants access to the “Report Suite” menu choice in the “View” Menu of CRMS.

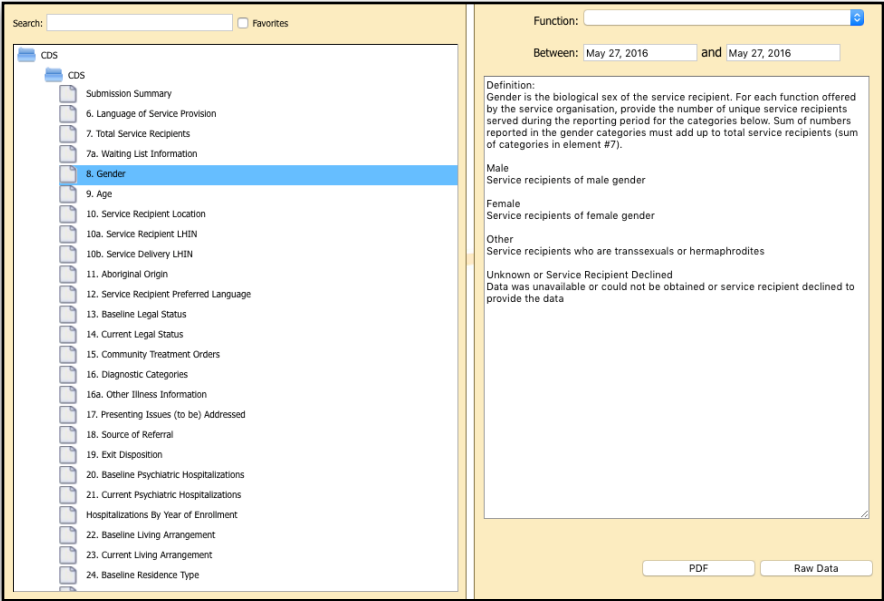
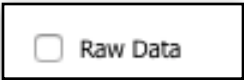


Figure 668 - Report Suite Access Right



The **Raw Data** access right allows users to get the raw data grid for the report they executed, rather than the “print preview” in a PDF format. This allows a user to copy and paste into their favourite software in order to manipulate and massage the data as necessary.

ReportSuite_plugin —> **Raw Data** = Grants access to the “Raw Data” button on the Report Suite Module.

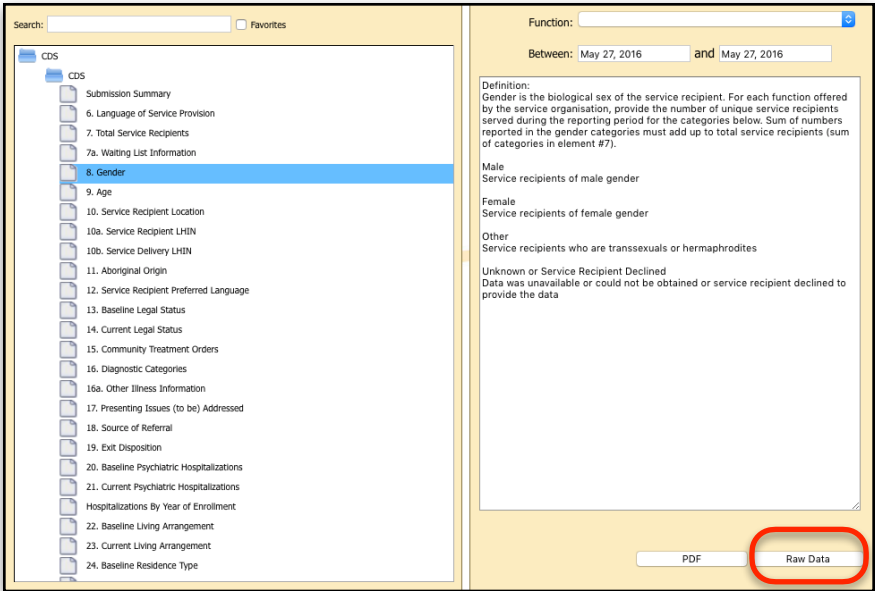


Figure 669 - Raw Data Access Right

Follow Up Scheduler

☐ Follow Up Scheduler

The **Follow Up Scheduler** access right allows the user to view the “Follow Up Scheduler” page located within the client chart. Users can then schedule “follow up’s” or appointments with a particular client. The user can then perform “concurrent documentation” as they attempt to complete the work, and the software will automatically generate the case note and equivalent contact once the “follow up item” has been marked as “Completed”. CRMS Administrators can also customize which note template will be used for each “follow up” type.

Tc_plugin —> **Follow Up Scheduler** = Grants access to the “Follow Up Scheduler” page located within the Client Chart.

Kauffman, Alex (04055415-02) - Active

Call Date: July 19, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: July 17, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: July 13, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: July 13, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: July 11, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			
Call Date: July 9, 2016	Call Time: 11AM	☐	
Contact Type: Alert	Program: Case Management		
Assigned To: Christian Gosselin	Last Worker:		
Reason: Contact Alex and ensuring he is taking his daily medications.			

Figure 670 - Follow Up Scheduler Access Right

☐ Follow Up Viewer

The **Follow Up Viewer** access right is necessary should the user need to ‘complete’ follow up’s. The “Follow Up Scheduler” access right simply allows them to schedule new follow up’s. In order to complete these follow up’s, the “Follow Up Viewer” access right must be granted. Enabling this access right allows the user to see “Follow Ups” as another Search Type within the CRMS Search Engine.

Tc_plugin —> **Follow Up Viewer** = Grants access to the “Follow Up Viewer” located within the CRMS Search Engine Search Types.

Search Type: Follow Ups

Start Date: May 01, 2016

End Date: Jun 30, 2016

Program: All Programs

Assigned To: All Workers

☐ Alert

☐ Consult

☐ Assessment

☐ Referral

☐ Follow Up

☐ In Progress

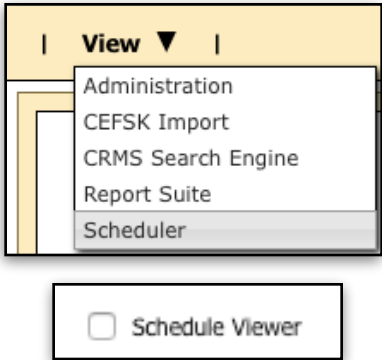
☐ Complete

Call Date: June 29, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 27, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 25, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 23, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 21, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 19, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		
Call Date: June 17, 2016 11AM	Client: Kauffman, Alex (04055415-02)	
Contact Type: Alert	Program: Case Management	
Assigned To: Christian Gosselin	Last Worker:	
Reason: Contact Alex and ensuring he is taking his daily medications.		

Showing 32 follow ups

Figure 671 - Follow Up Viewer Access Right

Tc_plugin —> **Scheduler Viewer** = Grants access to the “Scheduler” located within the “View” menu of CRMS.



The **Scheduler Viewer** access right allows the user to access the “Scheduler” located in the main “View” menu of CRMS. The “Scheduler” allows users to create and share their calendars, choosing which users can see and edit their calendar. Each worker can customize their own calendar colours. Appointments can be scheduled on an interval of the users choosing. Clients, groups and resources can all be added to the appointment.

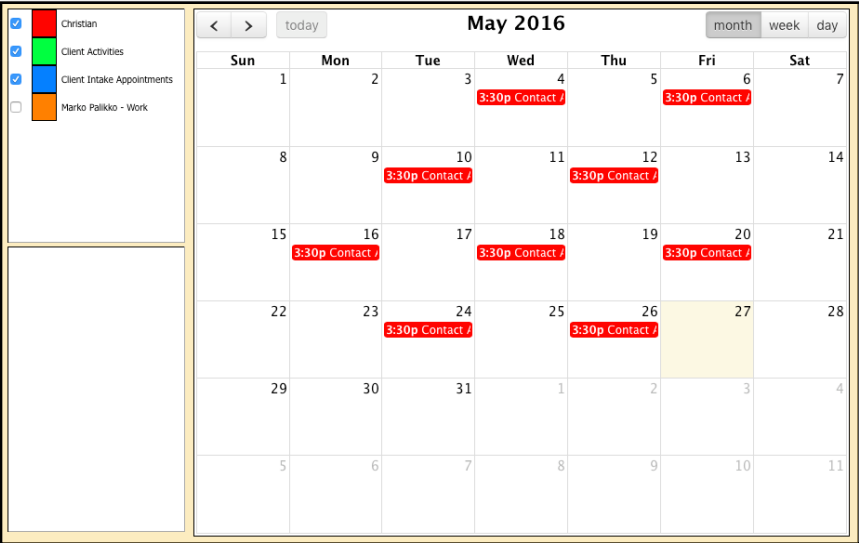


Figure 672 - Scheduler Viewer Access Right

Translations

The Translations module allows CRMS Administrators the ability to enter their own desired translations to be used within the software (when a user has their profile configure to French).

1. Refer to page 217 for how to access the Administration module.
2. Click on **Translations** as seen in Figure 673.

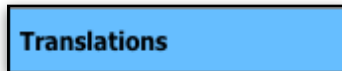


Figure 673 - Translations Module

3. The Translations module will then appear on screen.

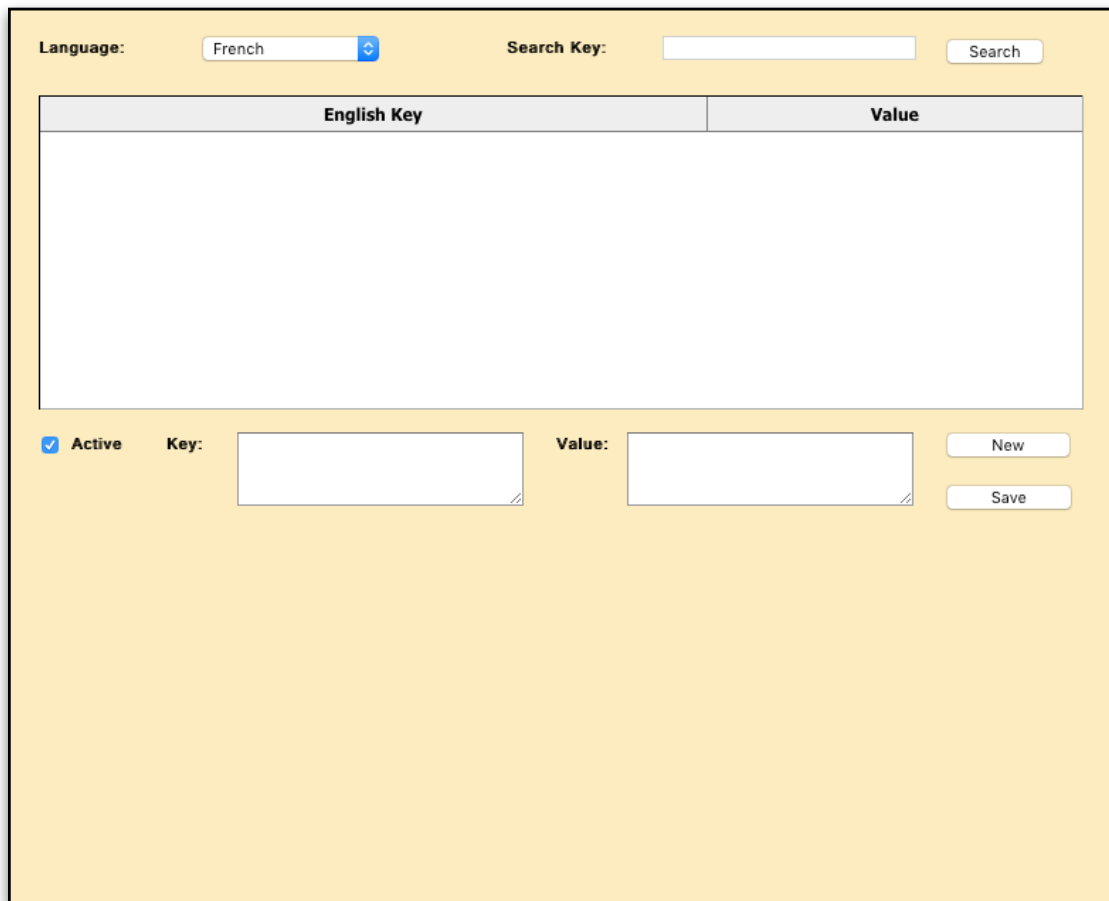


Figure 674 - Translations Module

4. CRMS Administrators should execute a search to see if an existing translation exists, or add a new one if necessary.

Creating a New Translation

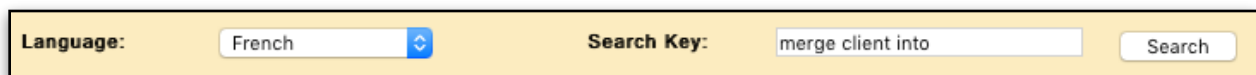
1. Refer to page 297 for how to access the Translations module.
2. Execute a search to ensure a translation does not already exist for the item currently being added.
3. In Figure 675 below, a user has located an English translation which must be translated.



Merge Client Into

Figure 675 - Located English Text Which Requires Translation

4. In the **Search Parameters**, enter the text which will be translated to ensure it doesn't already exist.
5. This is demonstrated in Figure 676.
6. Click **Search** when satisfied to execute the search.



Language:
Search Key:

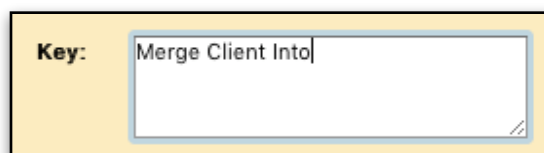
Figure 676 - Searching for Equivalent Translation

7. As can be seen in Figure 677, no equivalent translation has been located after performing the search.

English Key	Value

Figure 677 - No Equivalent Translation Located After Executing Search

8. In the **Key** field, enter the english text exactly as it appeared earlier on screen.



Key:

Figure 678 - Entering English Key for Translation

9. In the **Value** field, enter the desired french text which will be used as the translation.

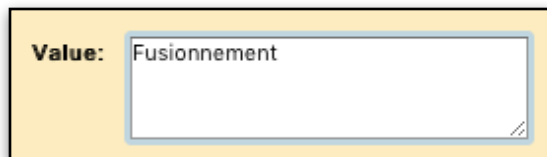
A screenshot of a form with a yellow background. On the left, the text 'Value:' is displayed. To its right is a text input field containing the word 'Fusionnement'. The input field has a light blue border and a small icon in the bottom right corner.

Figure 679 - Entering French Translation for English Key

10. When satisfied with the changes, click **Save** to finalize the process.

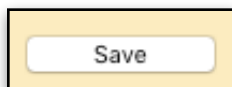
A screenshot of a yellow rectangular button with rounded corners. The button contains the word 'Save' in a dark gray, sans-serif font.

Figure 680 - Saving Translation

11. A message box will appear confirming the process was indeed successful.

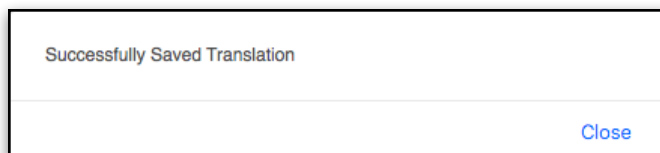
A screenshot of a white rectangular message box with a thin black border. The text 'Successfully Saved Translation' is displayed in a small, gray font. In the bottom right corner, there is a blue link labeled 'Close'.

Figure 681 - Successfully Saved Translation

12. The Translations module will then automatically refresh, and the newly added translation will appear in the list.

English Key	Value
Merge Client Into	Fusionnement

Figure 682 - Reviewing Newly Added Translation

13. Have the user log out completely of CRMS, and log back in for the Translations module to refresh.

14. The newly added translations will then be visible.

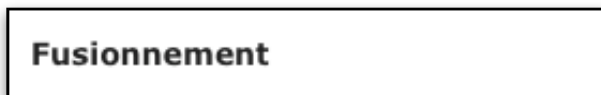
A screenshot of a white rectangular box with a thin black border. The word 'Fusionnement' is displayed in a bold, black, sans-serif font.

Figure 683 - Reviewing Newly Added Translation

Modifying an Existing Translation

1. To modify an existing translation, first access the **Translations** module as described on page 297.
2. In the Search field, enter the translation which is to be modified.
3. This is demonstrated in Figure 684.

Language: French Search Key: merge client into Search

English Key	Value
Merge Client Into	Fusionnement

Figure 684 - Modifying an Existing Translation

4. **Click** on the translation which is to be modified.
5. The English Key and the equivalent French value will be loaded on screen as is illustrated below in Figure 685.

English Key: Merge Client Into Value: Fusionnement

☒ Active Key: Merge Client Into Value: Fusionnement New Save

Figure 685 - Located Translation Which is to be Modified

6. Modify the **Value** field as necessary.

Value: Fusionnement de deux dossiers

Figure 686 - Modifying Existing Translation

7. When satisfied, click **Save** to finalize the process.

Save

Figure 687 - Saving Translation

8. A message box will appear confirming the save process was indeed successful.

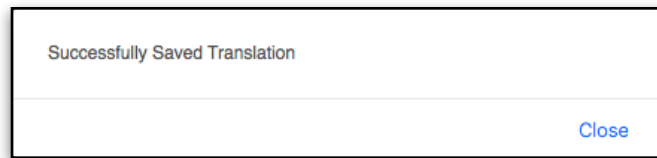


Figure 688 - Successfully Modified Translation

9. The Translations module will then automatically refresh to display the newly modified translation.

English Key	Value
Merge Client Into	Fusionnement de deux dossiers

Figure 699 - Reviewing Modified Translation

10. Ask the French user to log out completely of CRMS, and log back in.
11. The newly modified french translation will then be visible.



Figure 700 - Reviewing Modified Translation

Audit Log

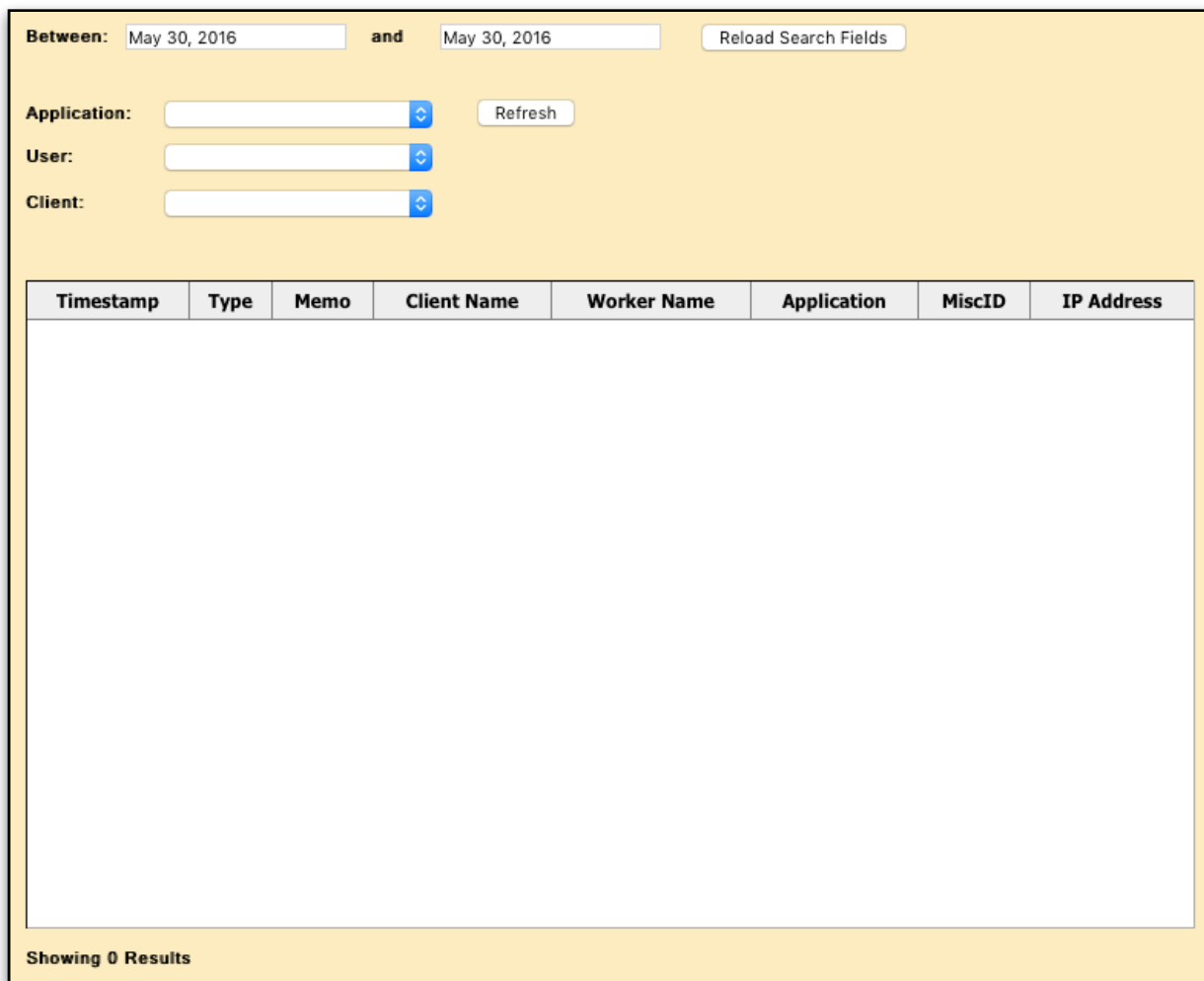
The Audit Log module allows CRMS Administrators the ability to perform audits or reviews for a worker transactions to see which files they have accessed, or vice versa from a clients' point of view, to see who has accessed their file should a client make a privacy request.

1. Refer to page 217 for how to access the Administration module.
2. Click on **Audit Log** as seen in Figure 701.



Figure 701 - Audit Log Module

3. The Audit Log module will then appear on screen as illustrated below in Figure 702.



Between: and

Application:

User:

Client:

Timestamp	Type	Memo	Client Name	Worker Name	Application	MiscID	IP Address
-----------	------	------	-------------	-------------	-------------	--------	------------

Showing 0 Results

Figure 702 - Audit Log Module

4. In order to review the Audit Log, first select the **Between Dates** as desired.
5. In Figure 703 below, a user has decided to review Audit Stamps between May 1, 2016 and May 30, 2016.

Between: May 01, 2016 and May 30, 2016

Figure 703 - Modifying Audit Log Review Dates

6. When satisfied with the inputted parameters, click **Reload Search Fields**.

Reload Search Fields

Figure 704 - Reloading Search Fields

7. The Application, User and Client drop down will then be refreshed.
8. The three drop downs will ONLY contain users or clients which have generated transaction stamps in the software between the selected dates.
9. This allows CRMS Administrators the ability to quickly review basic transactions without the need to refresh the Audit Log.
10. This is demonstrated in Figure 705 and Figure 706 below. Note that the two drop downs only contain transactions for the users and clients whom have generated transactions.

Between: May 01, 2016 and May 30, 2016

Application: [dropdown] Refresh

User: [dropdown] ✓
Christian Gosselin
Marko Palikko
Steve Bonito

Client: [dropdown]

Figure 705 - Audit Log User Drop Down Refreshed

Between: May 01, 2016 and May 30, 2016

Application: [dropdown] Refresh

User: [dropdown]

Client: [dropdown] ✓
a, allie 04050017-01
Alder, Tree 04050149-01
Amey, Laurel 04050246-01
Azulay, Nanci 00000122.01
Bajouwwe, Sue 04050167.06
Brady, Tom 04050012-02
Kauffman, Alex 04055415-01
Kauffman, Alex 04055415-02

Timestamp	Event Name	Worker Name

Figure 706 - Audit Log Client Drop Down Refreshed

11. CRMS Administrators can use any of the filters to limit their Audit Log results, or alternatively, they can click on **Refresh** without using any of the filters to see all the results.

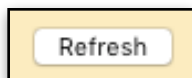


Figure 707 - Refreshing Audit Log Results

12. This is demonstrated in Figure 708.

Between:

May 01, 2016

and

May 30, 2016

Reload Search Fields

Application:

Refresh

User:

Client:

Timestamp	Type	Memo	Client Name	Worker Name	Application	MiscID
2016-05-30 10:24:13	View Audit Log	10:24:13		Christian Gosselin	Mobile Server 1.0	0
2016-05-30 10:10:31	View User Access Overview - Users	10:10:31		Christian Gosselin	Mobile Server 1.0	0
2016-05-30 10:10:31	Get User Group Info	10:10:31		Christian Gosselin	Mobile Server 1.0	234
2016-05-30 10:10:30	View Agency Information	10:10:30		Christian Gosselin	Mobile Server 1.0	0
2016-05-30 10:10:30	View Category Table	10:10:30		Christian Gosselin	Mobile Server 1.0	0
2016-05-30 10:10:30	Get User Groups List	10:10:30		Christian Gosselin	Mobile Server 1.0	0
2016-05-30 10:10:30	program list	10:10:30		Christian Gosselin	Mobile Server 1.0	0
2016-05-30 10:10:30	Get Users List	10:10:30		Christian Gosselin	Mobile Server 1.0	0
2016-05-30 10:10:30	Get Users Info	10:10:30		Christian Gosselin	Mobile Server 1.0	0
2016-05-30 10:10:30	View Lockbox Clients	10:10:30		Christian Gosselin	Mobile Server 1.0	0
2016-05-30 10:10:30	Client Groups list	10:10:30		Christian Gosselin	Mobile Server 1.0	0
2016-05-30 10:10:27	view - DATIS	10:10:27	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0
2016-05-30 09:57:09	Consent view	09:57:09	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	86
2016-05-30 09:57:02	View Non Client Services	09:57:02		Christian Gosselin	Mobile Server 1.0	0

Showing 2038 Results

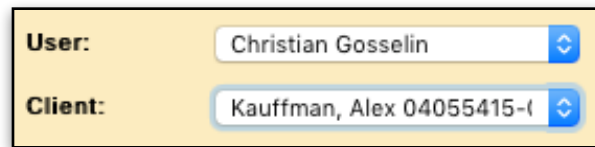
Figure 708 - Audit Log Refreshed Without the Use of Filters

13. Alternatively, a CRMS Administrator can use one, or a combination of all three filters.
14. In Figure 709, an Administrator is filtering for one users transactions.

User:	Christian Gosselin
-------	---

Figure 709 - Using Audit Log Filters

15. In Figure 710, an Administrator is filtering for a users' transactions with occurred with a particular client.

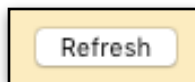


User: Christian Gosselin

Client: Kauffman, Alex 04055415-1

Figure 710 - Using Two Audit Log Filters

16. When satisfied with the changes to the Audit Log filters, click **Refresh** to view the transaction stamps.

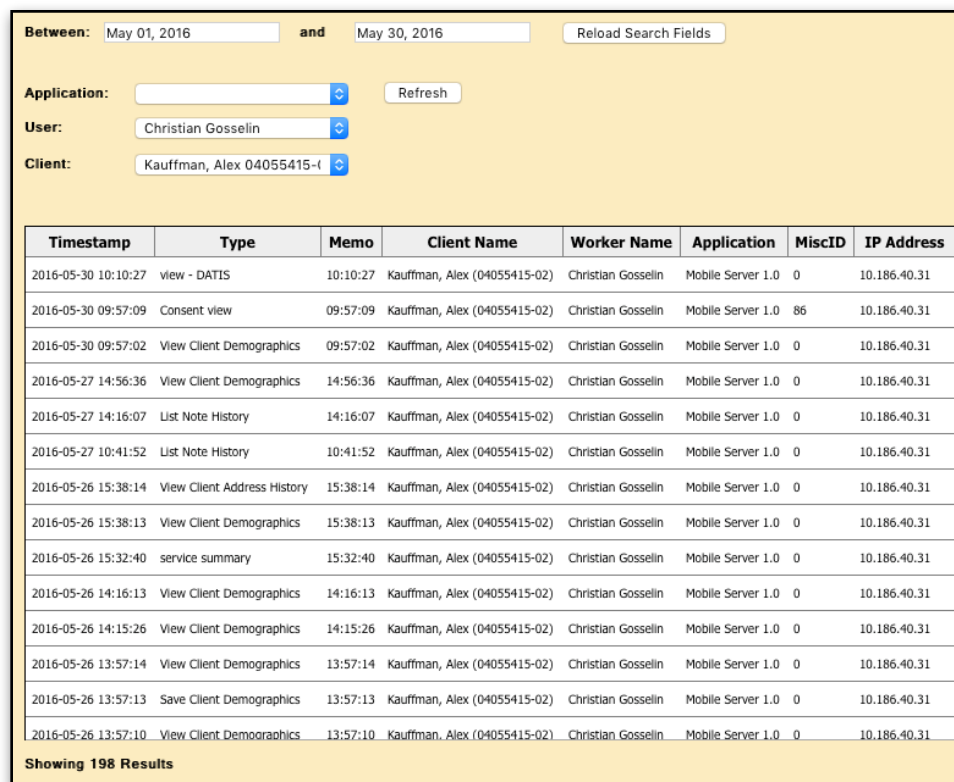


Refresh

Figure 711 - Refreshing Audit Log When Using Audit Log Filters

17. The Audit Log will then refresh.

18. As can be seen in Figure 712 a user 'Christian Gosselin' has generated 198 transactions between May 1, 2016 and May 30, 2016 with the client "Alex Kauffman".



Between: May 01, 2016 and May 30, 2016 Reload Search Fields

Application: Refresh

User: Christian Gosselin

Client: Kauffman, Alex 04055415-1

Timestamp	Type	Memo	Client Name	Worker Name	Application	MiscID	IP Address
2016-05-30 10:10:27	view - DATIS	10:10:27	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-30 09:57:09	Consent view	09:57:09	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	86	10.186.40.31
2016-05-30 09:57:02	View Client Demographics	09:57:02	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-27 14:56:36	View Client Demographics	14:56:36	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-27 14:16:07	List Note History	14:16:07	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-27 10:41:52	List Note History	10:41:52	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-26 15:38:14	View Client Address History	15:38:14	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-26 15:38:13	View Client Demographics	15:38:13	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-26 15:32:40	service summary	15:32:40	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-26 14:16:13	View Client Demographics	14:16:13	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-26 14:15:26	View Client Demographics	14:15:26	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-26 13:57:14	View Client Demographics	13:57:14	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-26 13:57:13	Save Client Demographics	13:57:13	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31
2016-05-26 13:57:10	View Client Demographics	13:57:10	Kauffman, Alex (04055415-02)	Christian Gosselin	Mobile Server 1.0	0	10.186.40.31

Showing 198 Results

Figure 712 - Reviewing Audit Stamps for a Particular User / Client

Agency Information

The Agency Information module allows CRMS Administrators to modify global application settings which have a tremendous impact on the software settings for all staff members.



Should the Administrator be unsure of changing these settings, please contact CRMS Support first. Modification of these settings can cause a dramatic effect on the software.

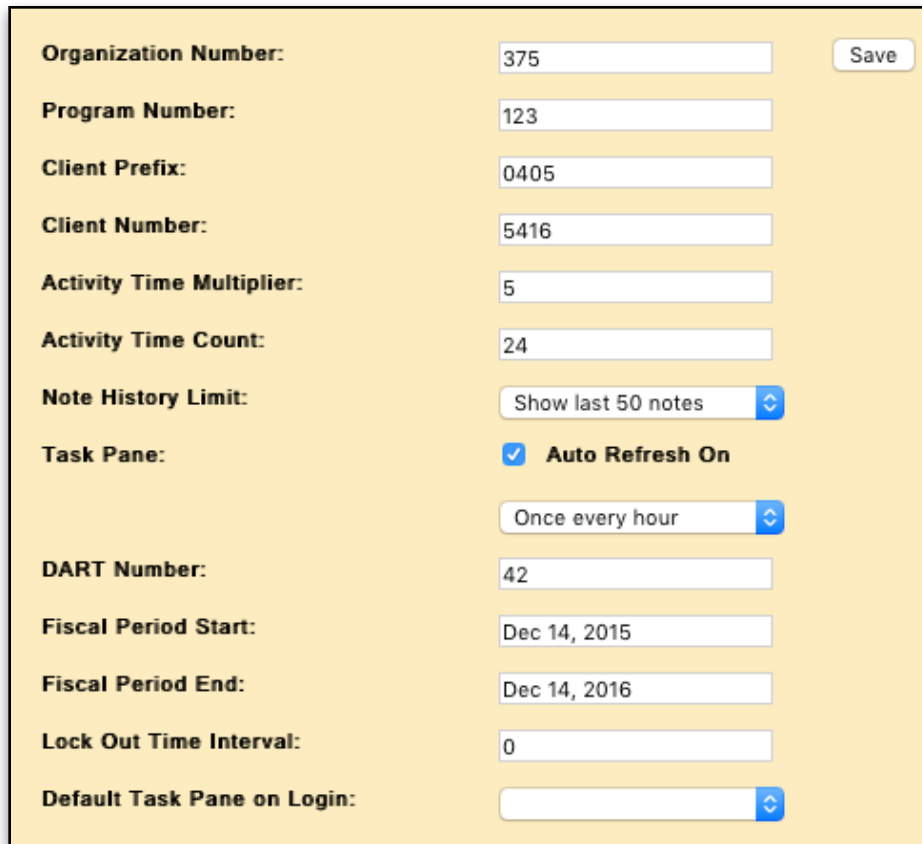
1. In order to access the Agency Information module, refer to page 217 for how to access the Administration module.
2. Click on **Agency Information** as seen in Figure 713.



Agency Information

Figure 713 - Agency Information Module

3. The Agency Information module will then be loaded on screen.



Organization Number:	375	Save
Program Number:	123	
Client Prefix:	0405	
Client Number:	5416	
Activity Time Multiplier:	5	
Activity Time Count:	24	
Note History Limit:	Show last 50 notes	v
Task Pane:	☒ Auto Refresh On	
	Once every hour	v
DART Number:	42	
Fiscal Period Start:	Dec 14, 2015	
Fiscal Period End:	Dec 14, 2016	
Lock Out Time Interval:	0	
Default Task Pane on Login:		v

Figure 714 - Agency Information Module

4. Table 5 below outlines the various fields located on the Agency Information module and their purpose.

Field	Purpose
Organization Number	Used for OCAN Data Submissions. Can also be inputted in the “Program Management” module.
Program Number	Used for OCAN Data Submissions. Can also be inputted in the “Program Management” module.
Client Prefix	The first four digits which will be used when generating the CRMS File #.
Client Number	The last four digits which will be used when generating the CRMS File #.
Activity Time Multiplier	The multiplier used when generating all “time” drop downs in CRMS.
Activity Time Count	The ‘count’ will be multiplied by the ‘multiplier’ to populate all ‘time’ drop downs in CRMS.
Note History Limit	The number of notes that will be visible by default when launching the “Forms History” Module.
Task Pane Auto Refresh	Whether or not the “Task Pane” will automatically refresh.
Task Pane Auto Refresh Interval	The time interval used to refresh the Task Pane (if Task Pane Auto Refresh is enabled).
DART Number	The DART Number for the DATIS Module.
Fiscal Period Start	Used exclusively by the CRMS School Board Modules. Not be confused with the CDS/MIS Fiscal Year. This is solely for ‘School Boards’.
Fiscal Period End	Used exclusively by the CRMS School Board Modules. Not be confused with the CDS/MIS Fiscal Year. This is solely for ‘School Boards’.
Lock Out Time Interval	The time out interval which will cause CRMS to ‘freeze’ and force the user to re-input their password after x minutes of inactivity.
Default Task Pane At Login	The default task pane will which be defaulted when the user logs in.

5. Upon modifying any of these settings, click **Save** to finalize the process.



Figure 715 - Saving Agency Information

6. A message box will appear confirming the process was indeed successful.

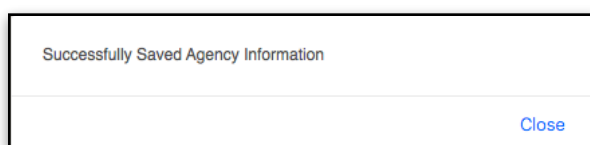


Figure 716 - Successfully Saved Agency Information

Category Table

The Category Table module allows CRMS Administrators to modify, add, remove and select a default for any drop down in CRMS.



CRMS Administrators can modify any drop down which is NOT defined by the MOHLTC. CDS/MIS drop downs CANNOT be modified by a CRMS Administrator as it will effect all CRMS Reports.

1. To access the Category Table module, refer to page 217 for how to access the Administration module.
2. Click on **Category Table** as shown in Figure 717.



Figure 717 - Category Table Module

3. The Category Table module will then be loaded on screen.

Value	Active	Sort	Default
-------	--------	------	---------

Figure 718 - Category Table Module

Adding a Drop Down Value

1. In order to add a drop down choice, access the Category Table module as described above on page 308.
2. From the **Type** drop down, select the desired choice. Refer to page 314 of the manual for a description of the various drop down choices.
3. As can be seen in Figure 719, an Administrator has select “Control” from the **Type** drop down.



Figure 719 - Selecting from the “Type” Drop Down

4. This will cause the Category Table module to refresh.
5. From the **Group** drop down, select the desired value. Refer to page 314 of the manual for a description of the various drop down choices.
6. Figure 720 below illustrates the Category Table module after refreshing.

Value	Active	Sort	Default
Salem	0	0	0
Windsor	1	0	0
Toronto	1	1	0
North Bay	1	2	0
Smith Falls	1	3	0
Kitchener	1	5	0
Peel	1	8	0

Figure 720 - Category Table Module Refreshed

7. To add a new drop down value, click **New** to ensure the Category Table module is in ‘new ‘mode.



Figure 721 - Creating a New Drop Down Value

8. Fill out the **Value** field with the desired text which will appear in the drop down.
9. This is demonstrated (see following page) in Figure 722. A user is in the process of adding a new city to the drop down.

Type: Control
Group: City
Value: London
Value (French):
Code:
☒ **Active**
Category:
Class:
Order: 0
☐ **Default**
Description:

Figure 722 - Adding a New Drop Down Value

10. When satisfied with the changes, click **Save** to finalize the process.

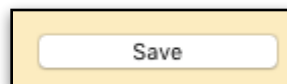


Figure 723 - Saving a New Drop Down Value

11. A message box will appear confirming the process was indeed successful.

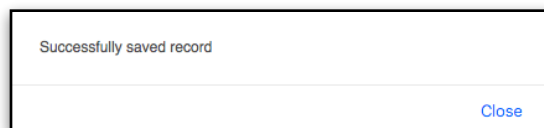


Figure 724 - Successfully Saved New Drop Down Value

12. The Category Table will then automatically refresh and the newly added item will be visible.

Value	Active	Sort	Default
London	1	0	0
Salem	0	0	0
Windsor	1	0	0

Figure 725 - Reviewing Newly Added Drop Down Value

Sorting the Drop Down Values

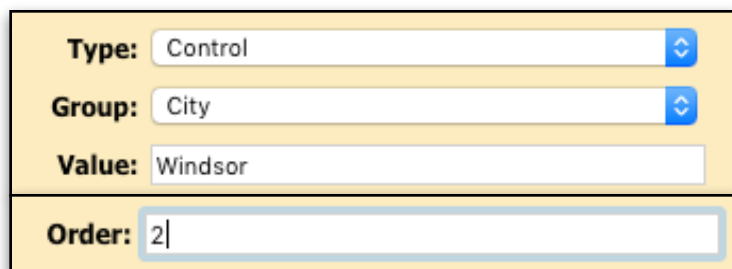
If desired a CRMS Administrator can customize and sort the drop down values as necessary. This can provide the users with a unique list sorted with the more commonly used items at the top for example.

1. Access the Category Table module as described on page 308 above.
2. Locate the desired drop down value which will be sorted.
3. In this example, the user is sorting the “City” drop down.
4. As can be seen in Figure 726 below, there are currently three drop down choices available : London, Windsor, and Toronto.

Value	Active	Sort	Default
London	1	0	0
Windsor	1	0	0
Toronto	1	1	0

Figure 726 - Sorting Drop Down Values

5. The Administrator would like to re-sort this list, and make Toronto the second choice, and Windsor the third choice.
6. CRMS sorts the drop downs by using the “Sort” column which is numeric.
7. This allows the Administrator to input their own numerical value, thereby sorting the value as desired.
8. Additionally, the software sorts the drop downs afterwards by the “Value” column as well.
9. This means an Administrator can leave all the **Sort** values to “0” which would cause the software to sort the list alphabetically.
10. **Click** to select one of the items in the list which will be re-sorted.
11. In this example, the user has clicked on Windsor to re-sort it.
12. As illustrated in Figure 727, a user has change the **Order** value to **2**.



The screenshot shows a configuration window with a yellow background. It contains four fields: 'Type' with a dropdown menu set to 'Control', 'Group' with a dropdown menu set to 'City', 'Value' with a text input field containing 'Windsor', and 'Order' with a text input field containing '2'. Each dropdown menu has a blue arrow icon to its right.

Figure 727 - Re-Sorting the “City” Drop Down

13. Click **Save** when satisfied to finalize the changes.
14. A message box will appear confirming the process was indeed successful.

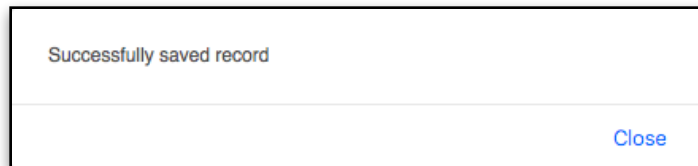


Figure 728 - Successfully Re-Sorted Drop Down Values

15. The Category Table module will then automatically refresh.
16. Figure 729 demonstrates the refreshed Category Table module.

Value	Active	Sort	Default
London	1	0	0
Toronto	1	1	0
Windsor	1	2	0

Figure 729 - Re-Sorted Drop Down Values

Removing a Drop Down Value

1. In order to remove a drop down value, refer to page 308 for how to access the Category Table module.
2. Using the **Type** and **Group** drop downs, select the desired drop down you wish to modify.
3. **Click** on the item in the list to select it and it will then be loaded it on screen.
4. Uncheck the **Active** check mark as seen in Figure 730.

Figure 730 - Removing a Drop Down Value

5. Click **Save** to finalize the process.
6. The Category Table will automatically refresh. Note that the item now has an "Active" value of "0".

Value	Active	Sort	Default
London	1	0	0
Toronto	1	1	0
Windsor	0	2	0

Figure 731 - Successfully Removed Drop Down Value

Marking a Drop Down Value as a Default

CRMS Administrators can also default drop down values across the software to better assist their staff. This can prevent the staff from having to repeatedly answer common questions.

1. Refer to page 308 for how to access the Category Table module.
2. Using the **Type** and **Group** drop downs, select the drop down which will be defaulted.
3. Once the Category Table has loaded, click on the desired drop down value which will be defaulted.
4. Click to select the drop down value from the available list to have it loaded on screen.

Value	Active	Sort	Default
London	1	0	0

Figure 732 - Marking a Drop Down Value as a Default

5. In Figure 733, a CRMS Administrator is defaulting “London” as the default city. Check off the **Default** check mark as seen below.

Type: Control
Group: City
Value: London
Value (French):
Code:
☒ Active
Category:
Class:
Order: 0
☒ Default

Figure 733 - Marking a Drop Down Value as a Default

6. Click **Save** to finalize the process.
7. The Category Table will automatically refresh. Note that “Default” now has a value of “1”.

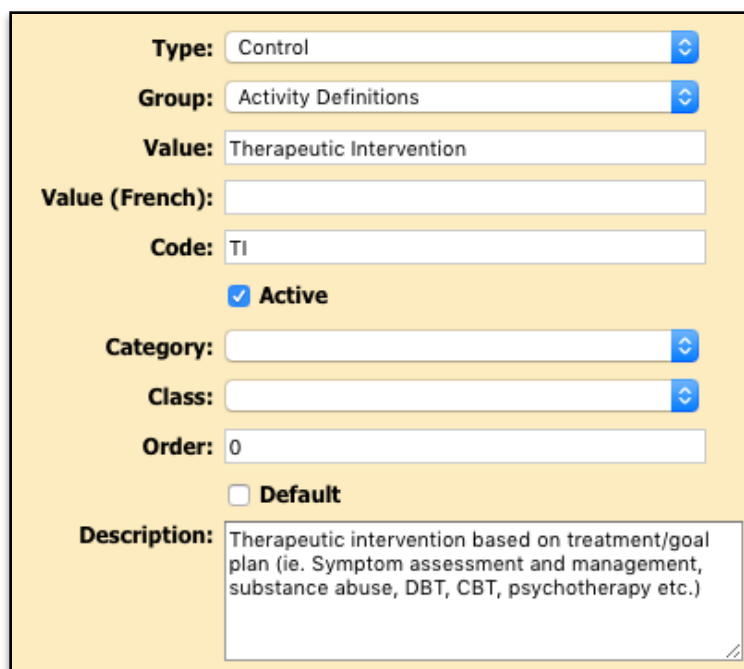
Value	Active	Sort	Default
London	1	0	1

Figure 734 - Successfully Marked Drop Down Value as Default

Drop Down Values Which Require Extra Data

Certain drop down values require the CRMS Administrator to input more data into the Category Table fields such as “Code” and “Description”. Refer to the Category Table guide on page 314 for more details. The following section of the manual will describe inputting more data into these fields for a drop down value such as “Activity Codes”.

1. Refer to page 308 for how to access the Category Table module.
2. Using the **Type** and **Group** drop downs, select the necessary values.
3. In this example, the CRMS Administrator is modifying an existing drop down.
4. Click to select the drop down which will be modified.
5. Figure 735 below outlines the extra fields an Administrator must input.



The screenshot shows a form for editing a drop-down value. The fields are as follows:

- Type:** Control (dropdown)
- Group:** Activity Definitions (dropdown)
- Value:** Therapeutic Intervention (text input)
- Value (French):** (empty text input)
- Code:** TI (text input)
- Active:** ☒ Active
- Category:** (empty dropdown)
- Class:** (empty dropdown)
- Order:** 0 (text input)
- Default:** ☐ Default
- Description:** Therapeutic intervention based on treatment/goal plan (ie. Symptom assessment and management, substance abuse, DBT, CBT, psychotherapy etc.) (text area)

Figure 735 - Drop Down Values Which Require Extra Data

6. In this example, the Administrator has also populated the “Code” field, as well as the “Description” field.
7. These extra points are necessary for the “Activity Definitions” drop downs.

Category Table Reference Guide



*****UNDER CONSTRUCTION***** - This section is under construction. Please contact CRMS Support to determine if an update is available.

Contacting CRMS Support



CRMS Support will only respond to requests from registered CRMS Administrators or users which have been approved by their Administrator.

1. Should a user encounter a bug with the software or would like to suggest an enhancement, the following procedures can be followed to notify CRMS Support.
2. Open a web browser and navigate the following web site : "www.crms-support.com".
3. Click on **Tickets** as shown below in Figure 736.

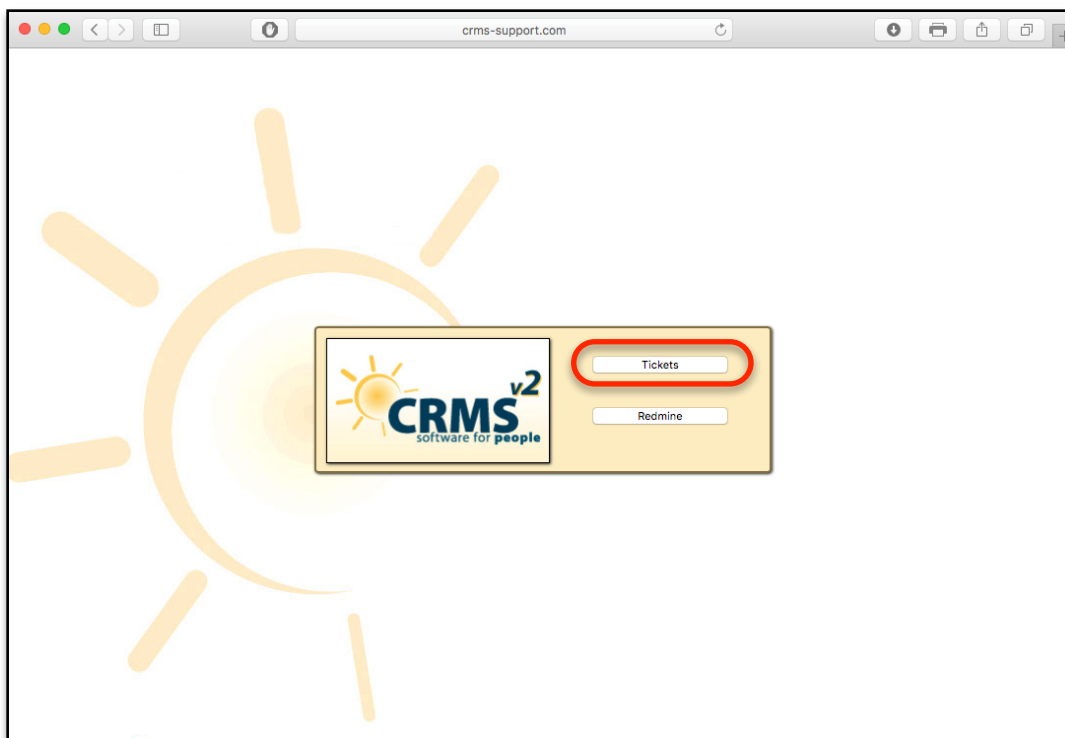


Figure 736- Submitting a Ticket to CRMS Support

4. The **Support Center** page will then be loaded as illustrated on the following page in Figure 737.



****TIPS AND TRICKS* - You can always reach a Support Technician by calling 1.800.617.2767, however please submit a ticket prior to doing so. This gives our Support Team some information about your issue.***



Figure 737 - Accessing Ticketing System

Opening a New Ticket

1. To create a new ticket, click on **Open a New Ticket** as shown below.

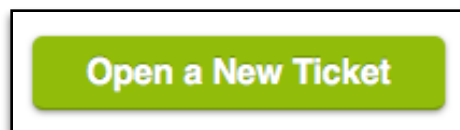


Figure 738 - Opening a New Ticket

2. Fill out as much information as possible when creating a new ticket.
3. The more detailed the information, the quicker CRMS Support can resolve the issue.
4. Figure 739 (see following page) demonstrates the process of creating a ticket.

SUPPORT CENTER

Support Ticket System

Guest User - [Log In](#)

[Support Center Home](#)
[Open New Ticket](#)
[Check Ticket Status](#)

Open a New Ticket

Please fill in the form below to open a new ticket.

Full Name:

Christian Gosselin *

Email Address:

cgosselin@crms-software.com *

Telephone:

613-384-9894 Ext.:

Help Topic:

Support *

Subject:

Error Message - Merge Client Dialog *

Message:

Please provide as much detail as possible so we can best assist you. *

Hello,

I am attempting to merge a client file on my Production system, and upon clicking "Merge Client Into" on the Client Search Engine, I received the following error message. I have attached the error message for your review. Do not hesitate to contact me directly for further info.

Attachments:

Choose File

no file selected

Create Ticket

Reset

Cancel

Figure 739 - Creating a New Ticket

- Note in Figure 739 above, no attachment has been added yet. Screenshots of the issue can greatly assist CRMS Support.
- Click **Choose File** to attach your error message.

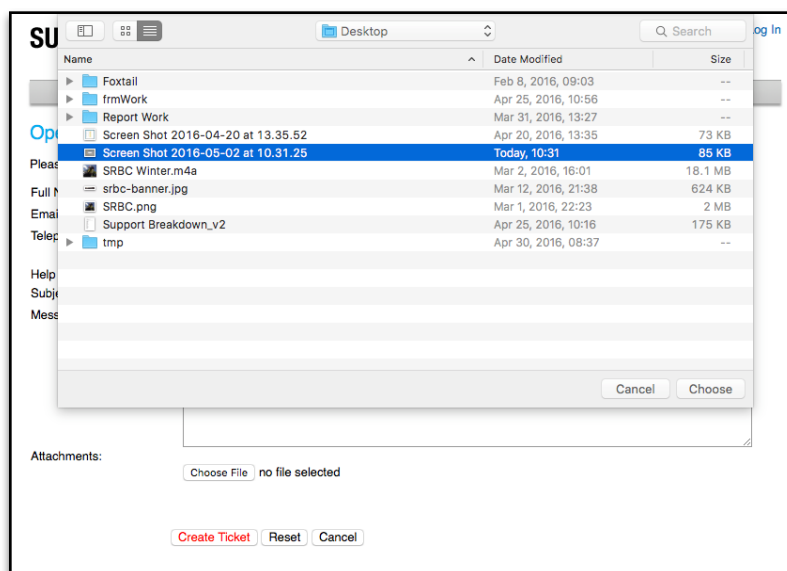


Figure 740 - Attaching Error Message

7. The ticket will automatically refresh to confirm the attachment has been successfully added.
8. This is demonstrated below in Figure 741.

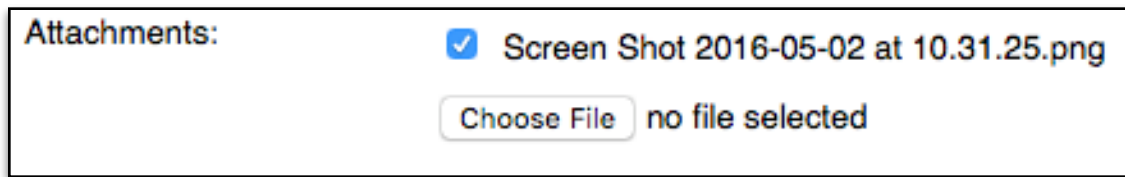


Figure 741 - Successfully Added Attachment to Ticket



****TIPS AND TRICKS* - You can attach multiple screenshots into a ticket if necessary! Once the first attachment has been added, repeat the process by clicking on “Choose File” again.***

9. Once satisfied, click **Create Ticket**.
10. Please be patient as the Support System creates the ticket, it might take a few moments.
11. Once the ticket has been created, a confirmation message will appear on screen.

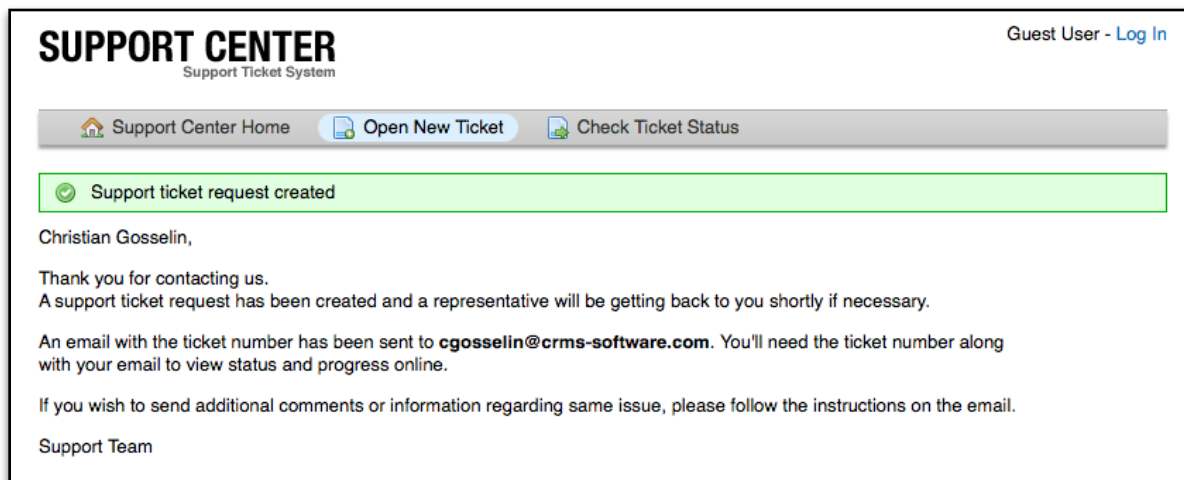


Figure 742 - Successfully Created Ticket

12. The Support System will also send the ticket creator an automatic email confirming the ticket as created.
13. Verify your 'Junk' folder of your email client if you do not receive the notification within a few moments.
14. Figure 743 on the following page demonstrates the automatic email received from the Support System.

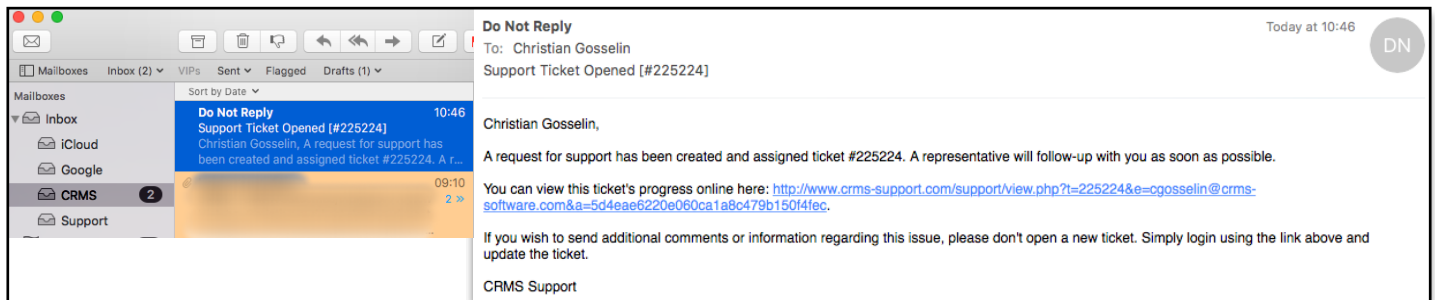


Figure 743 - Automated Email from the CRMS Support System

15. Once the CRMS Support staff have had a chance to review your ticket, a reply will also be sent automatically via email.
16. Figure 744 below demonstrates a reply from the CRMS Support staff.

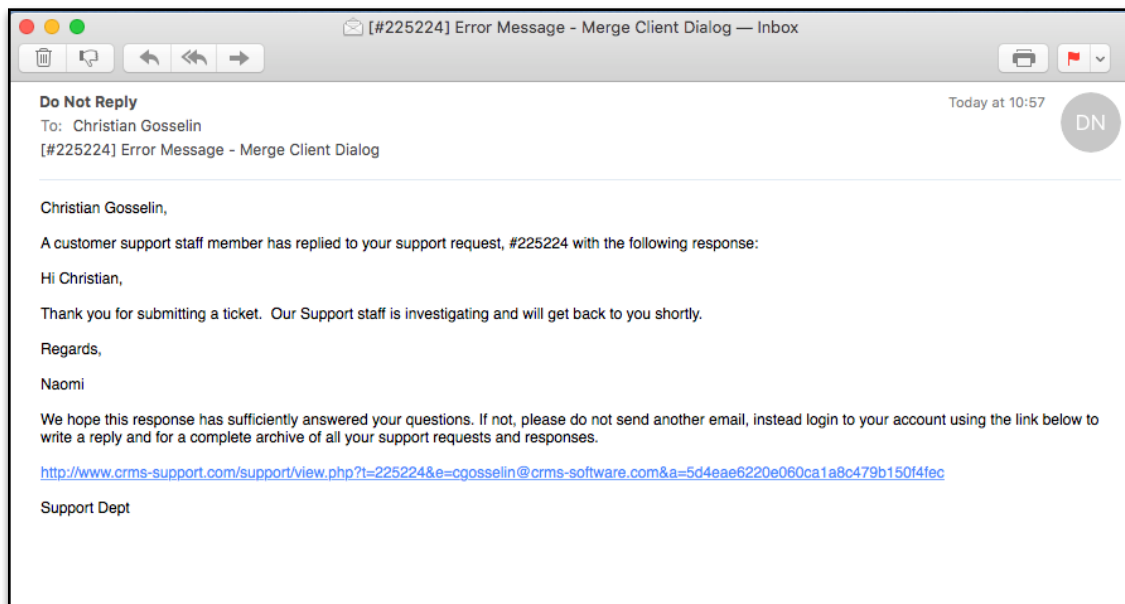


Figure 744 - Reply Received from CRMS Support

Checking Ticket Status

1. In order to check the status on an open ticket, refer to the section above for how to access the Support System.
2. From the Support System, click on **Check Ticket Status**.



Figure 745 - Checking Ticket Status

3. Input the email address and ticket number.
4. This can be obtained from the original automated email you received from CRMS Support.

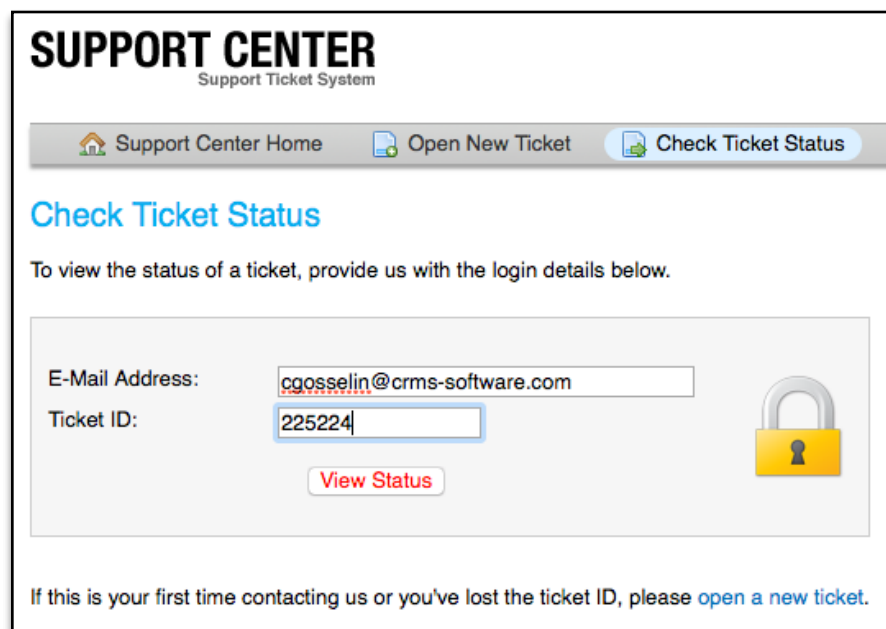
A screenshot of a web application titled "SUPPORT CENTER" with the subtitle "Support Ticket System". Below the title is a navigation bar with three links: "Support Center Home" (with a house icon), "Open New Ticket" (with a document icon), and "Check Ticket Status" (with a document icon and a blue highlight). The main heading is "Check Ticket Status" in blue. Below it is a message: "To view the status of a ticket, provide us with the login details below." There is a form with two input fields: "E-Mail Address:" containing "cgosselin@crms-software.com" and "Ticket ID:" containing "225224". A red "View Status" button is below the fields. To the right of the fields is a yellow padlock icon. At the bottom, a message says: "If this is your first time contacting us or you've lost the ticket ID, please [open a new ticket](#)."

Figure 746 - Verifying Ticket Status

5. Please be patient as the Support Center accesses your ticket information.
6. Figure 747 on the following page demonstrates the Support Center window after having refreshed with your ticket information.

SUPPORT CENTER

Support Ticket System

Christian Gosselin - My Tickets (13) - Log Out

Support Center Home

Open New Ticket

My Tickets (13)

Ticket #225224

Ticket Status: Open

Department: Support

Create Date: 05/02/2016 10:46 am

Name: Christian Gosselin

Email: cgosselin@crms-software.com

Phone: (613) 384-9894

Subject:Error Message - Merge Client Dialog

Ticket Thread

05/02/2016 10:46 am

Hello,

I am attempting to merge a client file on my Production system, and upon clicking "Merge Client Into" on the Client Search Engine, I received the following error message. I have attached the error message for your review. Do not hesitate to contact me directly for further info.

Screen_Shot_2016-05-02_at_10.31.25.png

(82.6 kb)

05/02/2016 10:57 am

Christian Gosselin

Hi Christian,

Thank you for submitting a ticket. Our Support staff is investigating and will get back to you shortly.

Regards,

Naomi

Figure 747 - Reviewing Ticket Information

- As can be seen in Figure 747 above, a CRMS Support representative has replied to your ticket.
- The Support Center will also provide you with a text box to reply to the CRMS Support team and add any additional attachments if necessary.

Post a Reply

Message:

To best assist you, please be specific and detailed *

Attachments:

Choose File

no file selected

Post Reply

Reset

Cancel

Figure 748 - Replying to an Open Ticket

9. Users can also review their entire ticket status.
10. From the Support Center home page, click on **My Tickets** as shown in Figure 749.

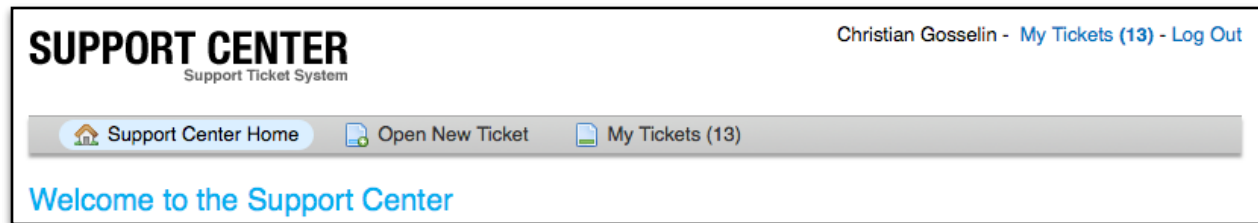


Figure 749 - Accessing Ticket History

11. The Support Center will then refresh to show all tickets open with the email address used to open tickets.

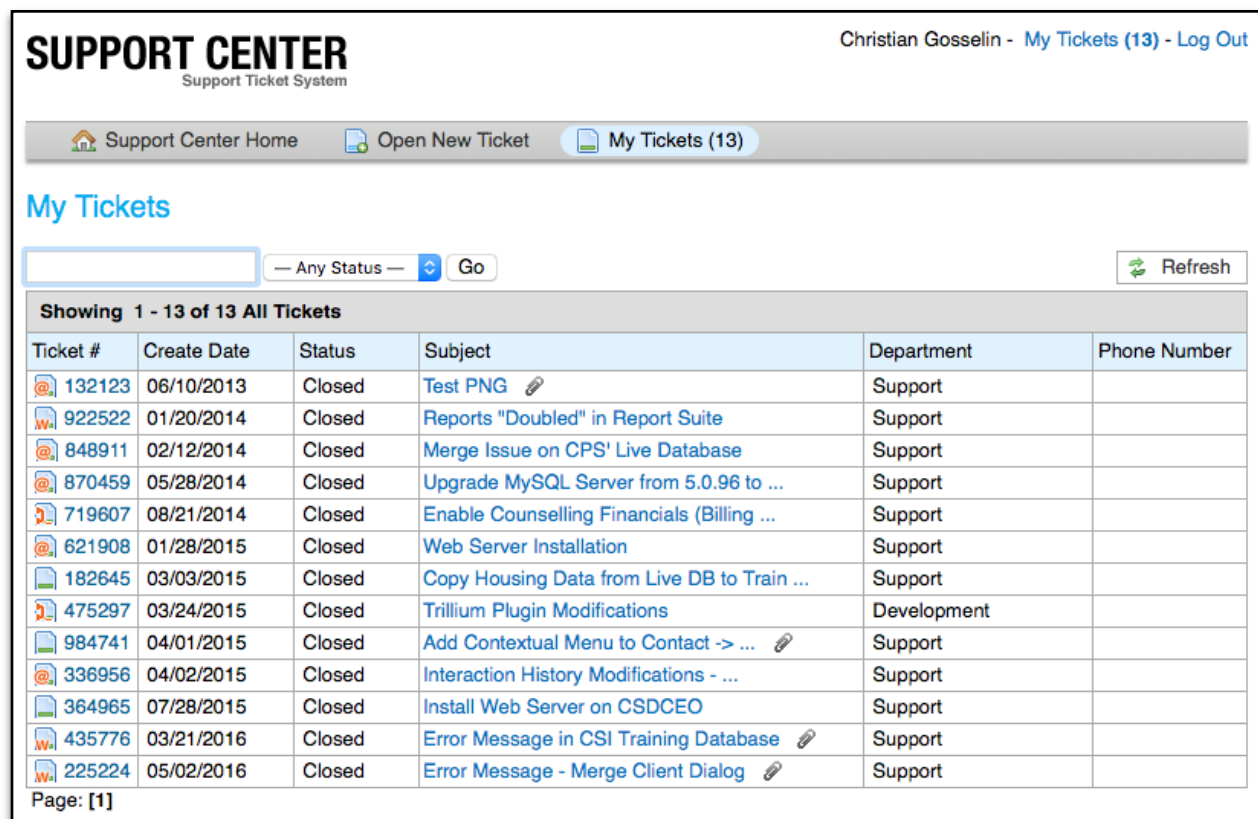


Figure 750 - Reviewing Ticket History



