

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.

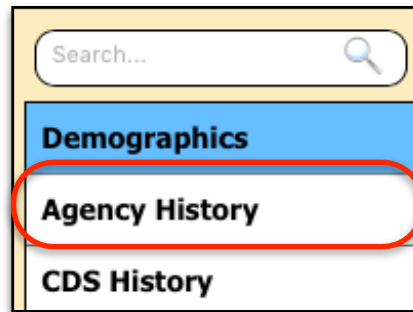


Figure 104 - Accessing Agency History

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

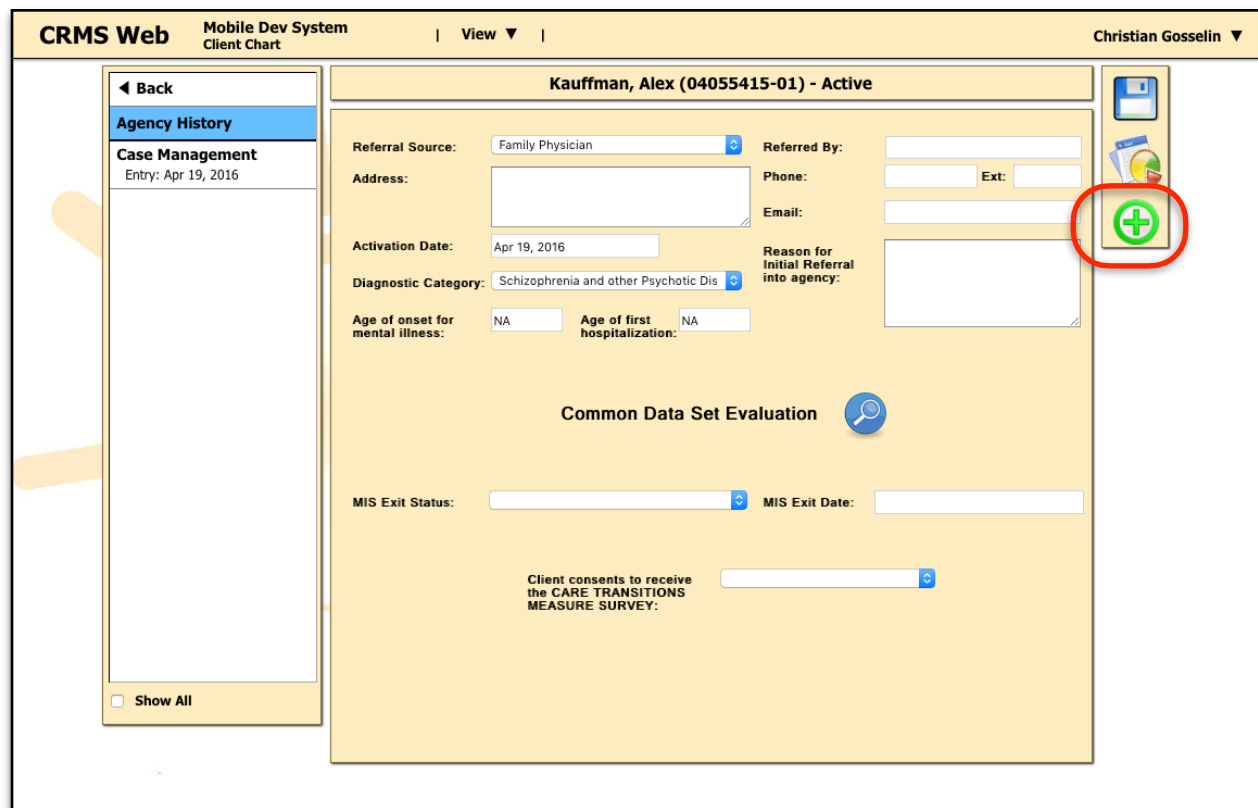
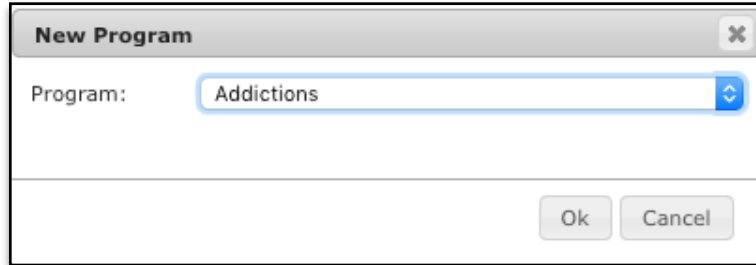
A screenshot of the 'CRMS Web' interface. The top header bar contains 'CRMS Web', 'Mobile Dev System Client Chart', a 'View' dropdown, and the user name 'Christian Gosselin'. On the left is a sidebar with a 'Back' button and two menu items: 'Agency History' (highlighted in blue) and 'Case Management' (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' (empty), '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' (empty), 'Phone' (empty), 'Ext' (empty), 'Email' (empty), and 'Reason for Initial Referral into agency' (empty). Below these fields is a section titled 'Common Data Set Evaluation' with a magnifying glass icon. At the bottom are 'MIS Exit Status' (empty) and 'MIS Exit Date' (empty). A checkbox labeled 'Show All' is at the bottom left. On the right side of the form, there is a vertical toolbar with three icons: a folder, a document, and a green plus icon inside a red circle.

Figure 105 - Adding a New Program

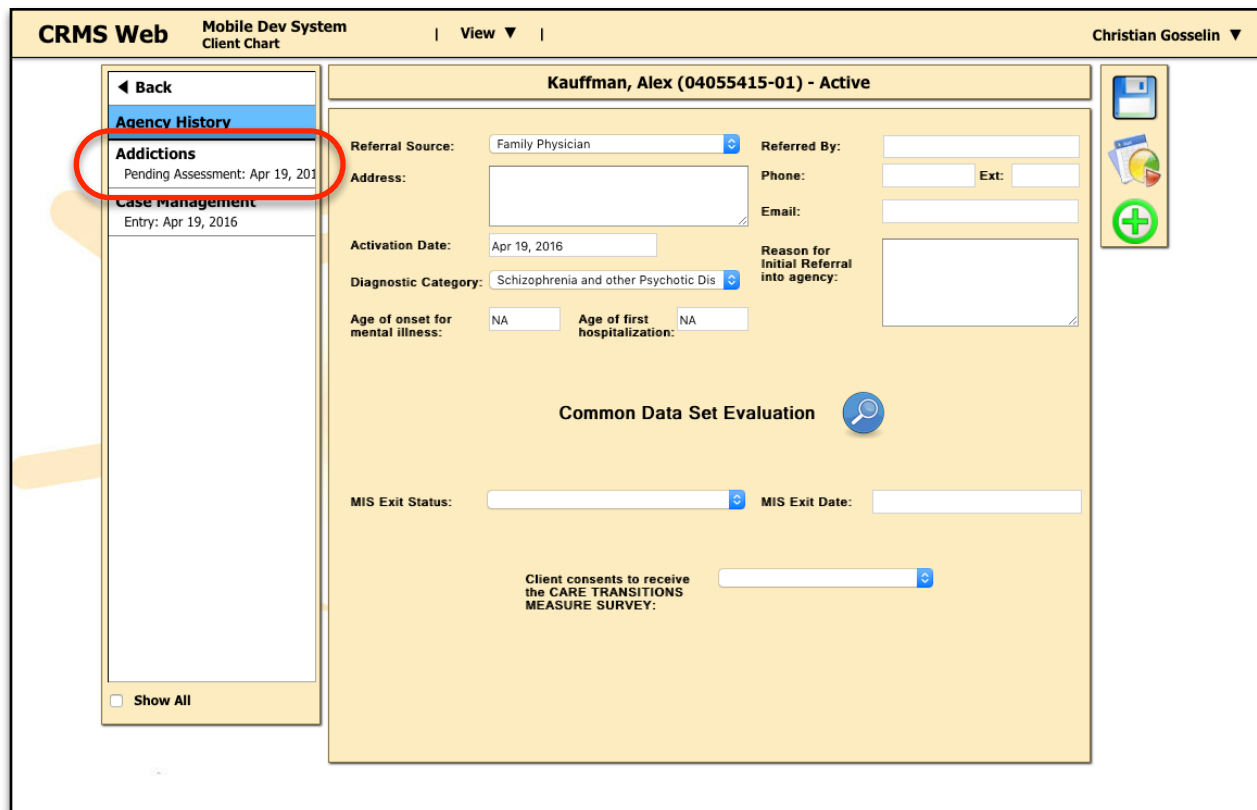
4. The **New Program** dialog will then be displayed as shown below in Figure 106.



A dialog box titled "New Program" with a close button (X) in the top right corner. It contains a label "Program:" followed by a dropdown menu showing "Addictions". At the bottom right 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 several 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. At the bottom are "MIS Exit Status" (empty), "MIS Exit Date" (empty), and a checkbox for "Client consents to receive the CARE TRANSITIONS MEASURE SURVEY:". On the right side of the main area 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 ▼

◀ Back

Agency History

Additions
Pending Assessment: Apr 19, 2016

Case Management
Entry: Apr 19, 2016

Show All

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:

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, 201	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