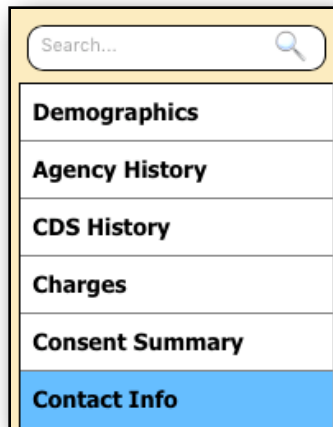


Contact Info Module

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.

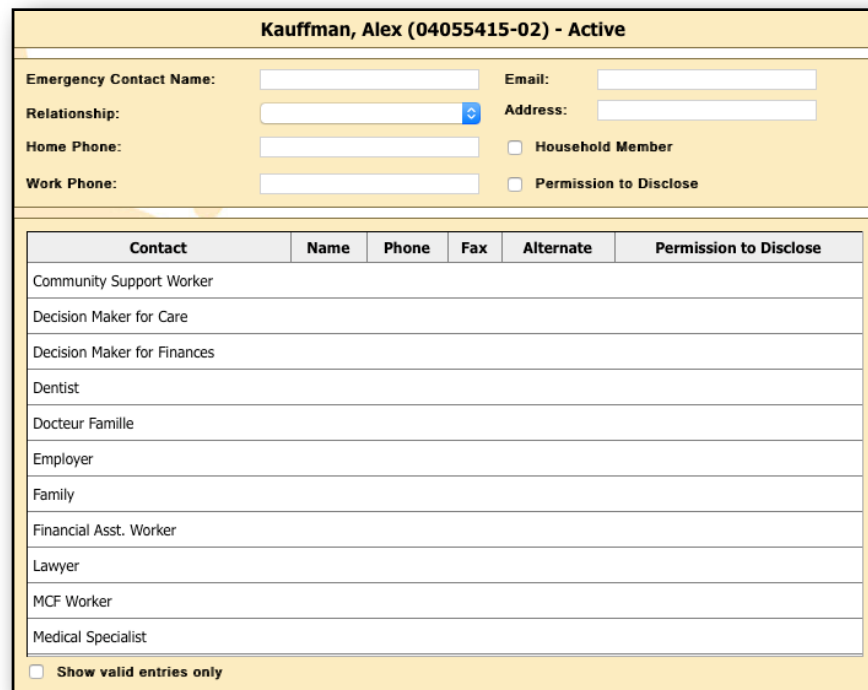
1. Access the CRMS Search Engine as described on page 16.
2. Locate the desired client and open their chart as described on page 50.
3. From the list of modules, select **Contact Info** as shown below in Figure 286.



A vertical menu with a search bar at the top. Below the search bar are several 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 for 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.

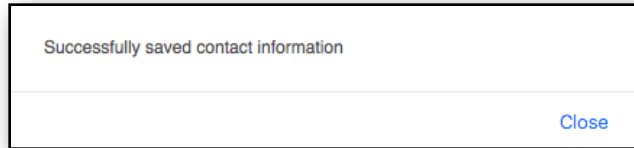


Figure 291 - Successfully Saved Contact Information

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.

Successfully saved contact information

Close

Figure 296- Successfully Updated Contact Info