

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.

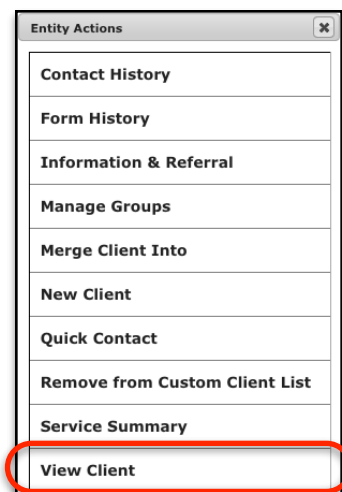


Figure 85 - Viewing Client

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.

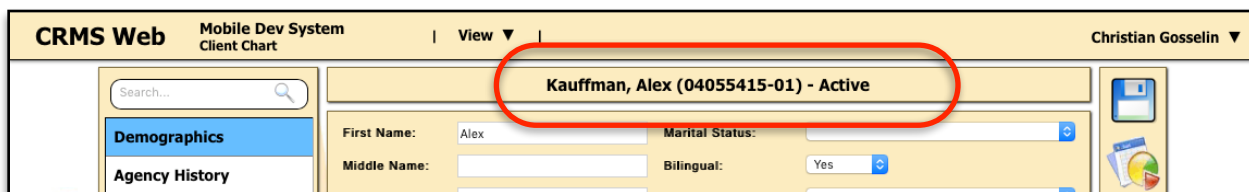
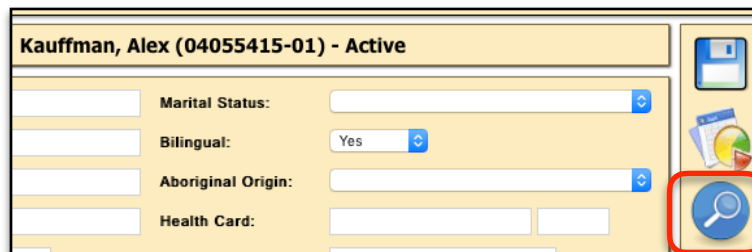


Figure 86 - Using the Client Shortcut

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

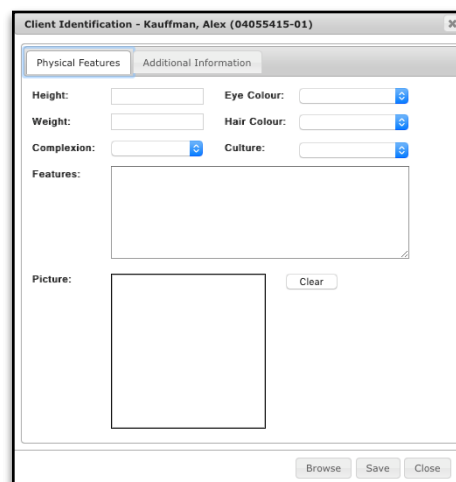
1. To access the Client Identification module, locate the client file using the CRMS Search Engine as described above in page 16.
2. From the Demographics page, click on the blue **magnifying glass** as identified in Figure 87 below.



The screenshot shows a client record for "Kauffman, Alex (04055415-01) - Active". The record includes fields for Marital Status, Bilingual (Yes), Aboriginal Origin, and Health Card. On the right side, there is a vertical toolbar with icons for saving, printing, and a blue magnifying glass icon, which is highlighted with a red square to indicate it is the button to click to access the Client Identification module.

Figure 87 - Accessing Client Identification Module

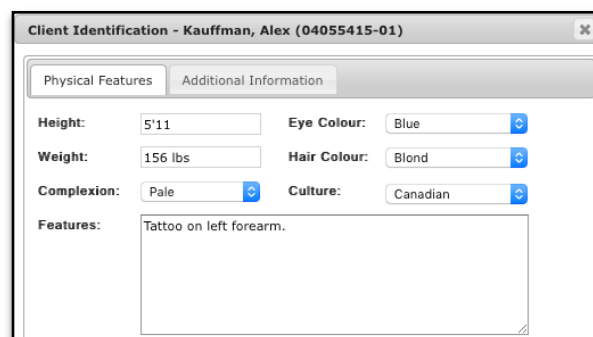
3. The Client Identification module will appear on screen as shown in Figure 88.



The screenshot shows the "Client Identification - Kauffman, Alex (04055415-01)" window. It has two tabs: "Physical Features" and "Additional Information". The "Physical Features" tab is active, showing fields for Height, Weight, Complexion, Eye Colour, Hair Colour, and Culture. There is also a "Features" text area and a "Picture" section with a "Clear" button. At the bottom, there are "Browse", "Save", and "Close" buttons.

Figure 88 - Client Identification Module

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



The screenshot shows the "Client Identification - Kauffman, Alex (04055415-01)" window with the "Physical Features" tab active. The fields are filled out as follows: Height: 5'11, Weight: 156 lbs, Complexion: Pale, Eye Colour: Blue, Hair Colour: Blond, and Culture: Canadian. The "Features" text area contains the text "Tattoo on left forearm." The "Picture" section is empty. The "Browse", "Save", and "Close" buttons are at the bottom.

Figure 89 - Filling out Client Identification Module

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

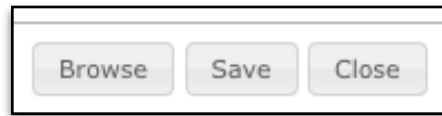


Figure 90- Saving Client Identification

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.

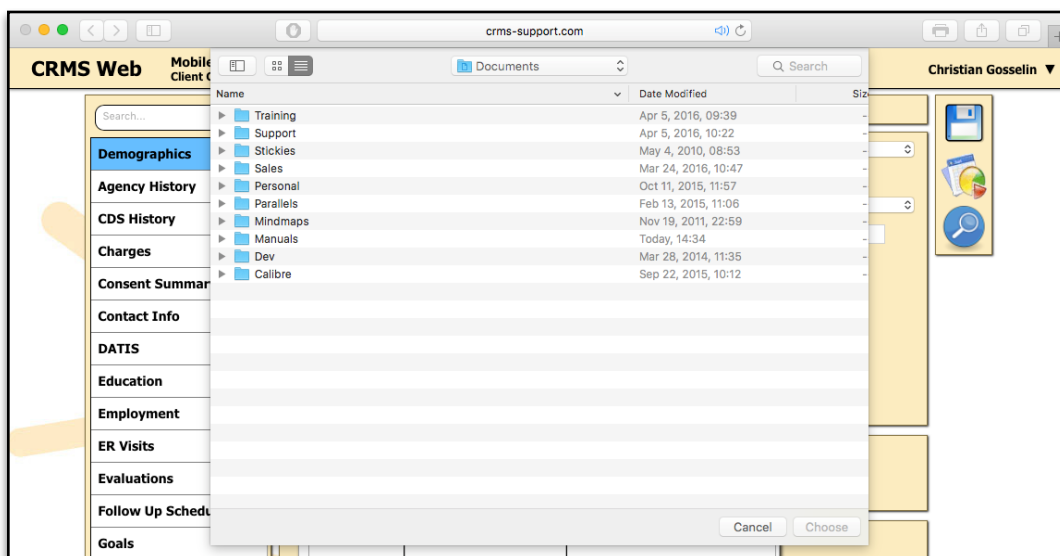


Figure 92- Selecting Client Picture

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.

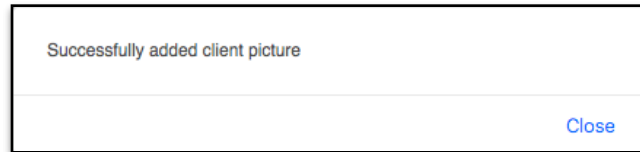


Figure 93 - Successfully Added Client Picture

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

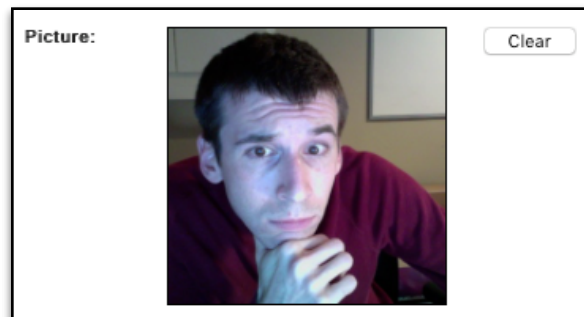


Figure 94 - Reviewing Client Picture

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.

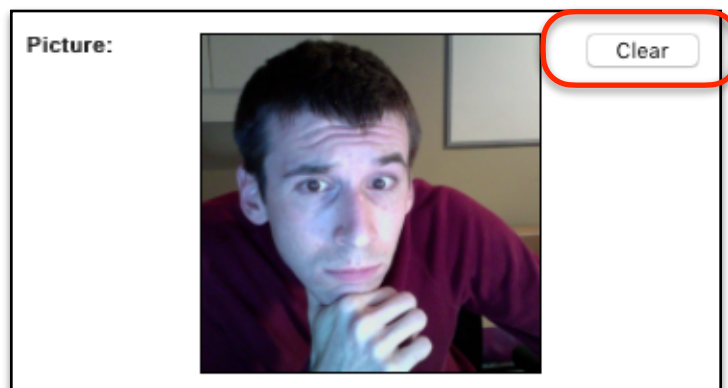


Figure 95 - Clearing Client Picture

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

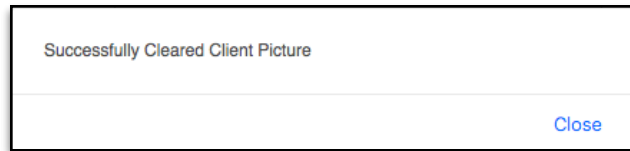


Figure 96 - Successfully Cleared Client Picture

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.



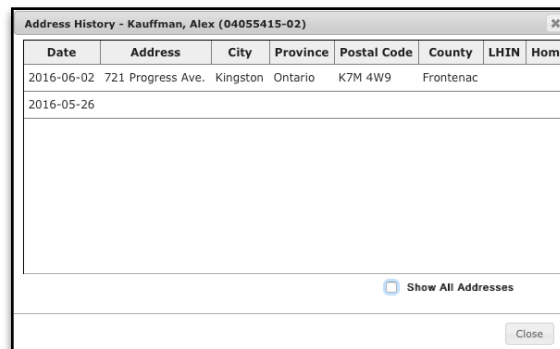
The screenshot shows a client address form with the following fields:

- 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.



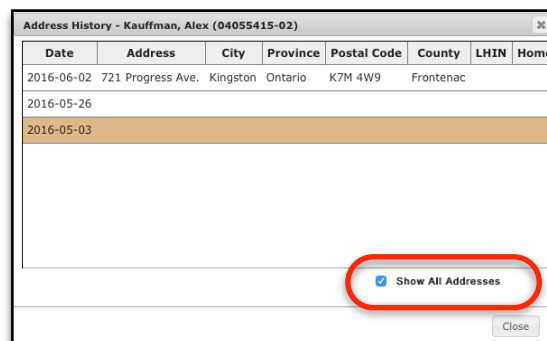
The Address History Dialog for Alex Kauffman (04055415-02) displays a table with the following data:

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							

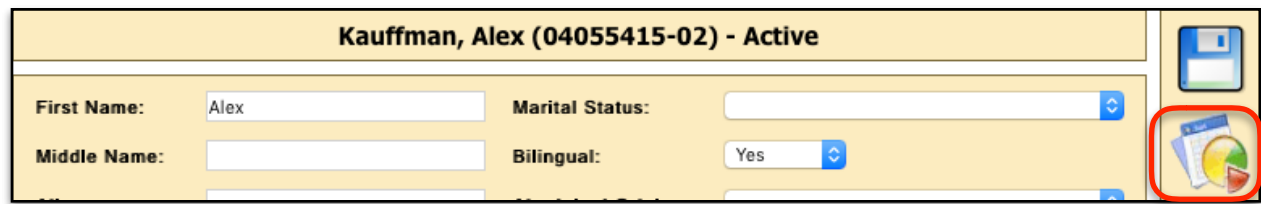
At the bottom of the dialog, the "Show All Addresses" checkbox is checked and circled in red. A "Close" button is also present.

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

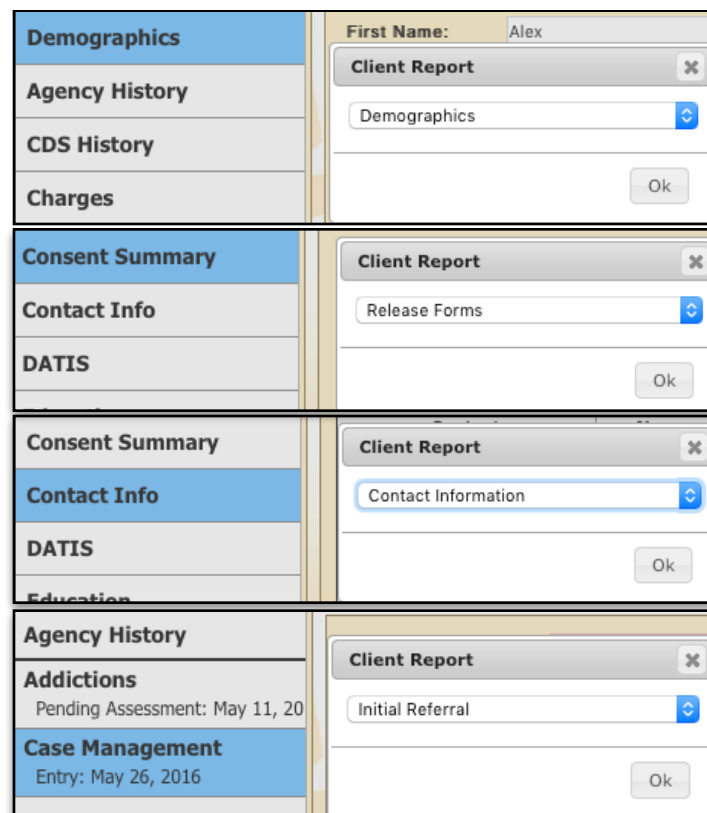
First Name: Alex Marital Status: [Dropdown]

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	Report Options
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