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.

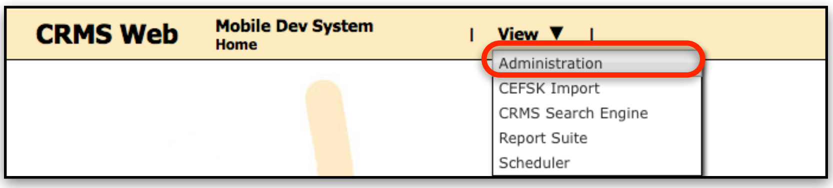

Figure 490 - Accessing Administration Module

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.

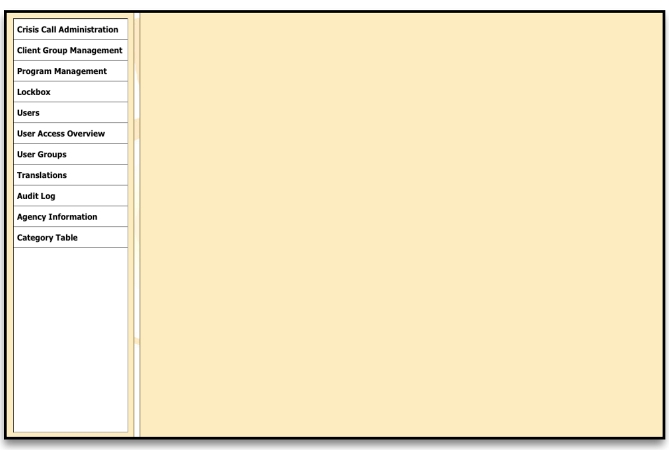

Figure 491 - Administration Module

***TIPS AND TRICKS* - An Administrator might not have access to all the modules listed in Figure 491. These are all individual access rights.**

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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.

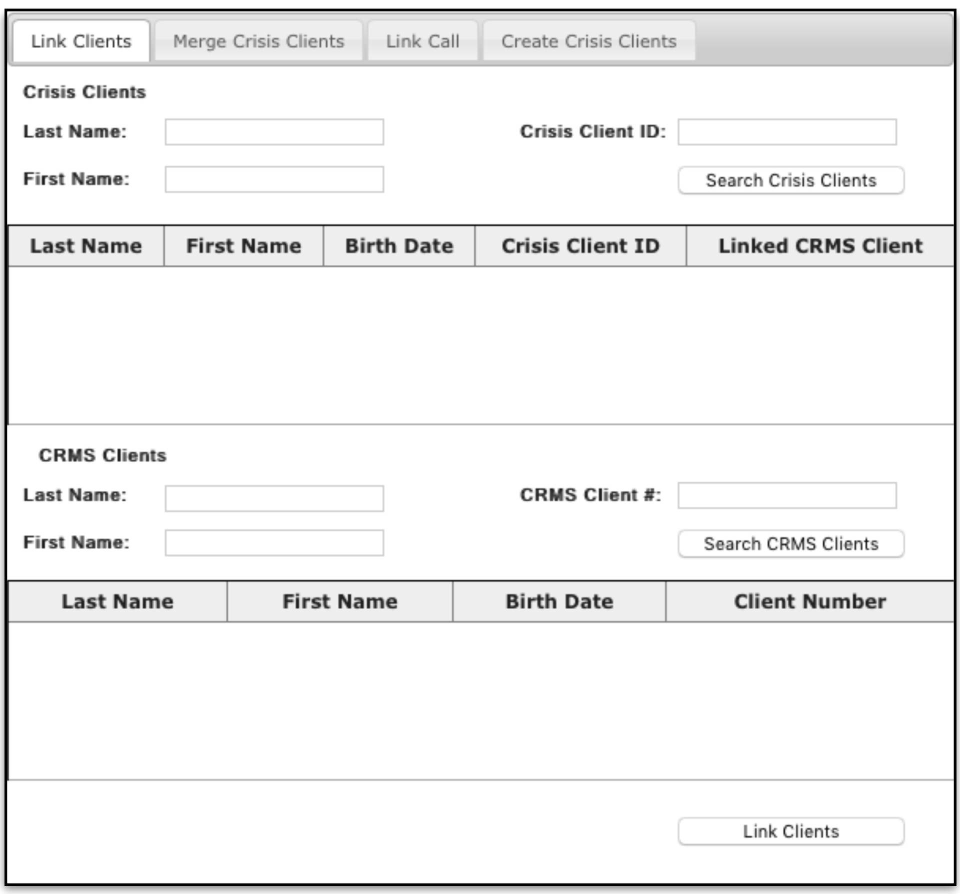

Figure 493 - Crisis Call Administration

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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.

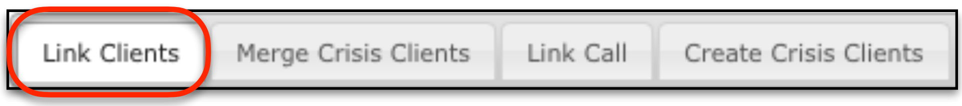
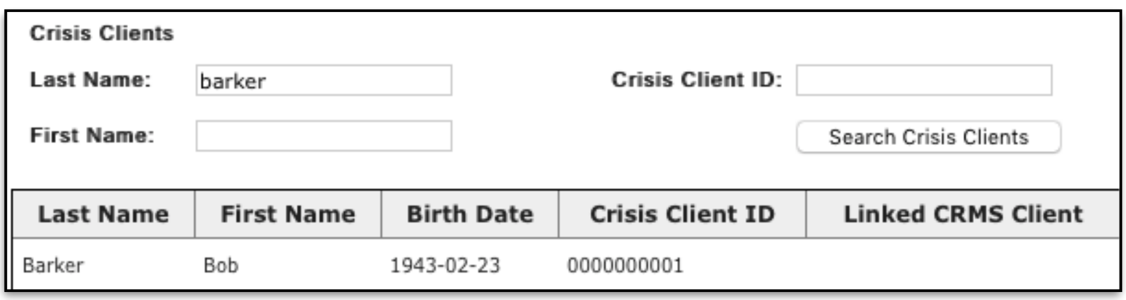


Figure 494 - Accessing Link Clients Tab

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:

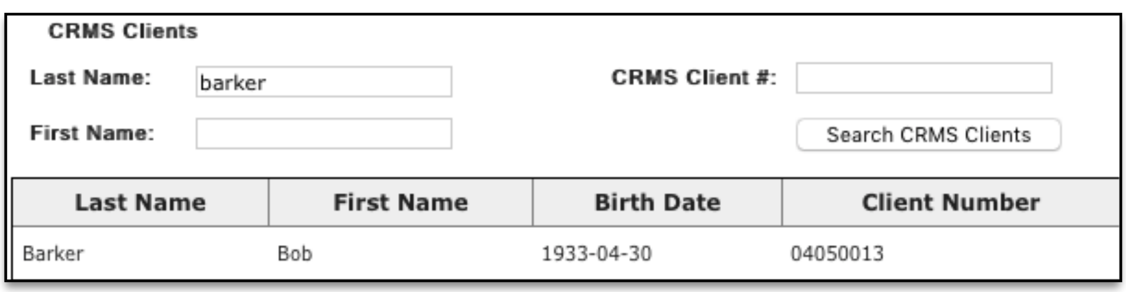
First Name:

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.

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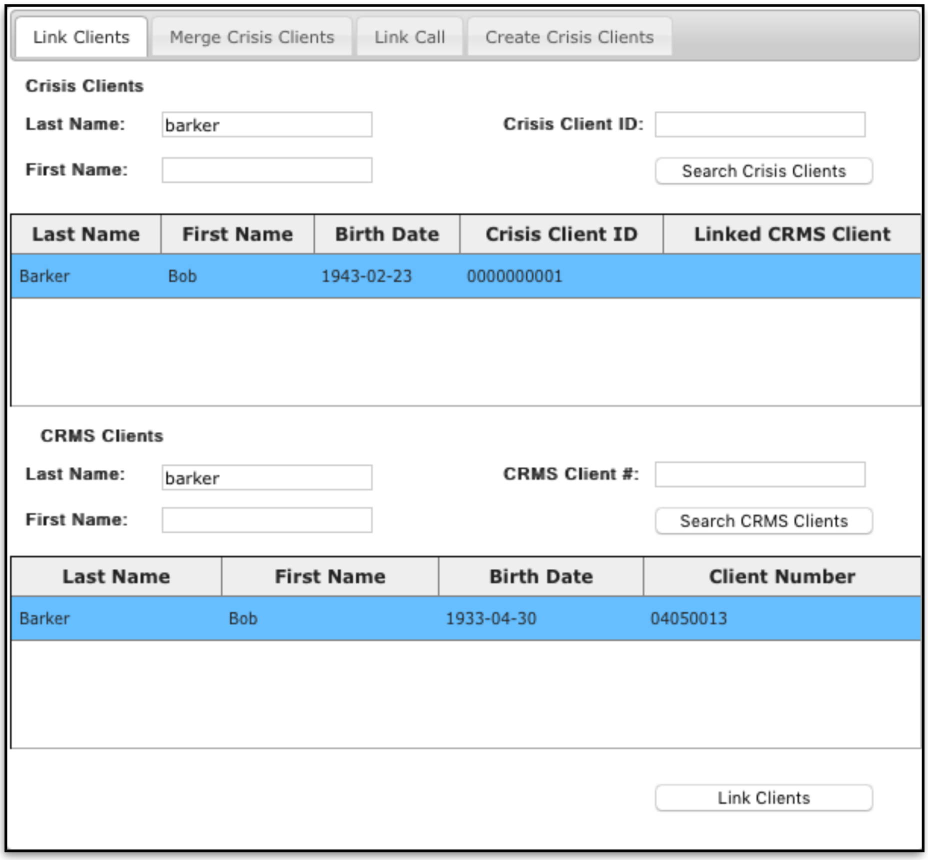

Figure 497 - Selecting Both Clients Whom Will be Linked Together

7. Once satisfied with the client selection in both sections, click **Link Clients** as shown below.

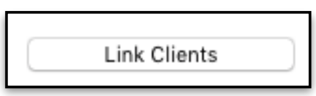

Figure 498 - Linking Clients

8. A user will be presented with a confirmation dialog allowing them to cancel if desired. This is shown in Figure 499.

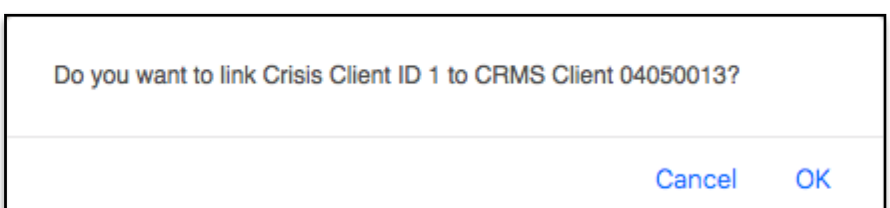

Figure 499 - Confirming the Linking Process

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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.

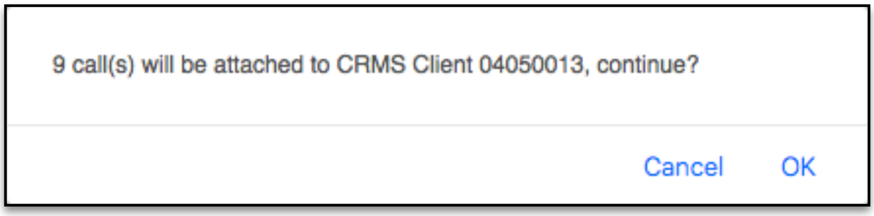

Figure 500 - Confirming the Data Which Will be Linked

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.

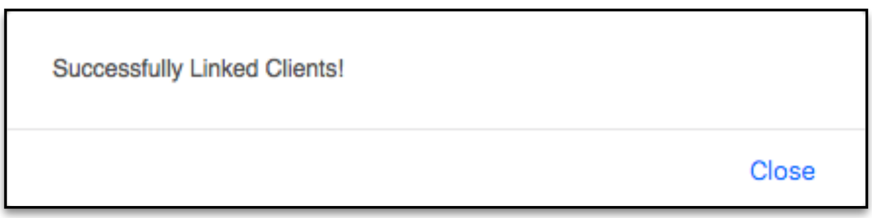

Figure 501 - Successfully Linked Clients

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.

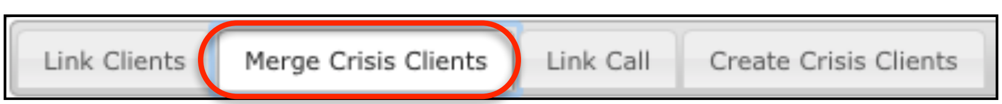

Figure 502 - Merge Crisis Clients

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3. The **Merge Crisis Clients** tab will then appear on screen.

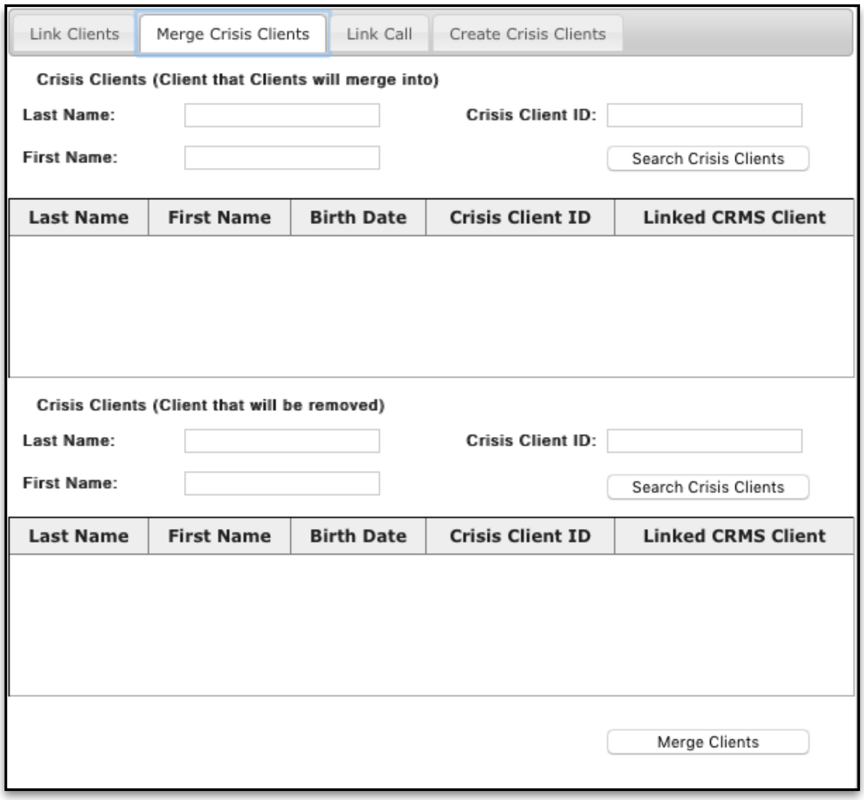

Figure 503 - Merge Crisis Clients Tab

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".

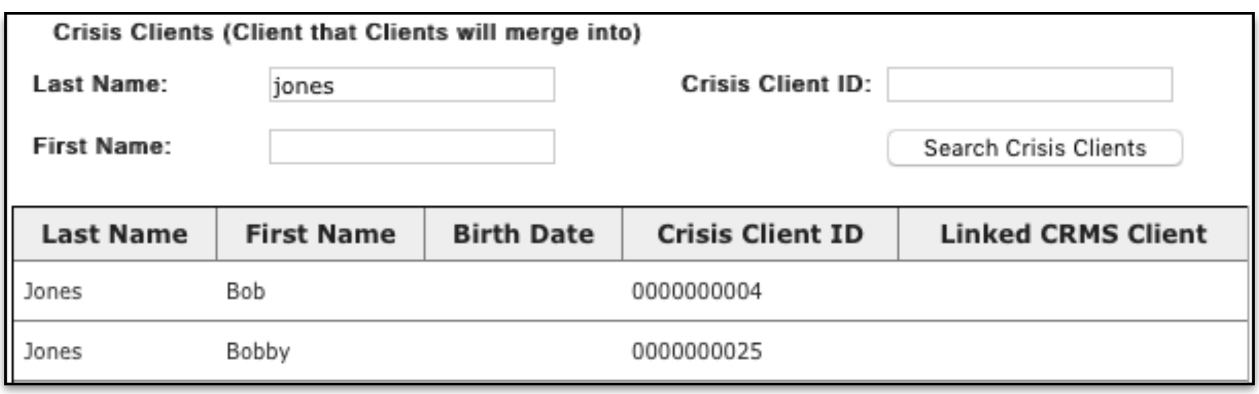

Figure 504 - Searching for Crisis Client Which Will Remain in the Software

6. In the "Crisis Clients (clients that will be removed)" section locate the file which will be **removed** from the software.

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7. In Figure 505, a user is searching for a client with the last name of “jones”.

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.

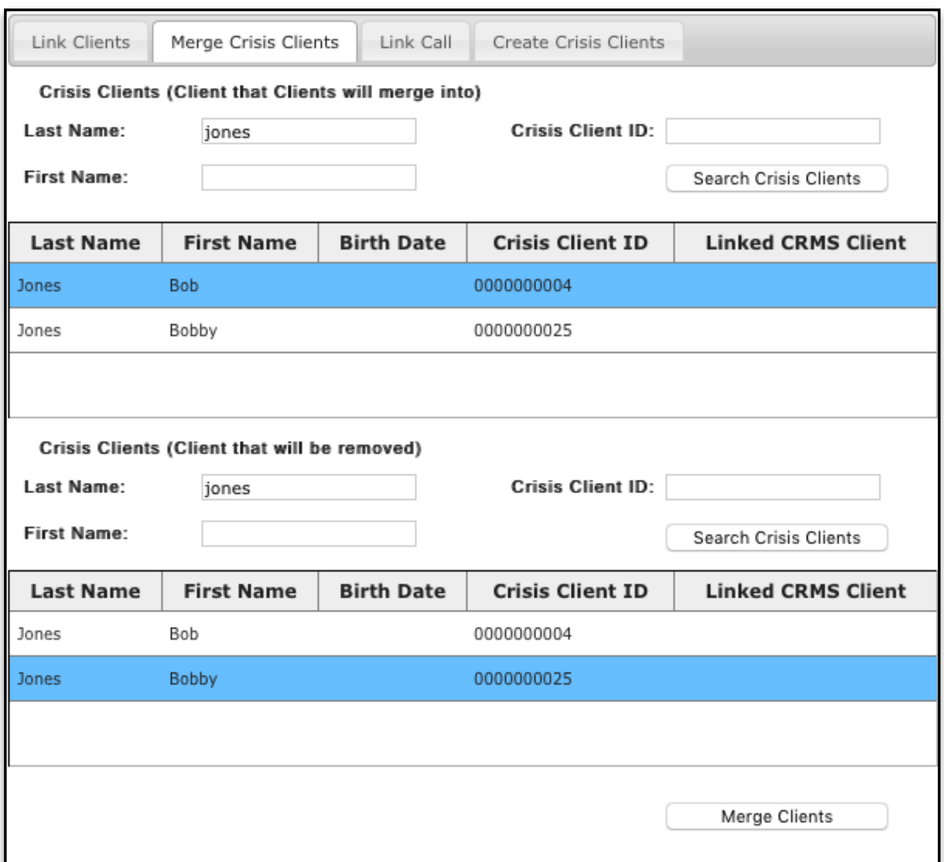

Figure 506 - Selected Both “Crisis” Clients Whom Will be Merged Together

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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.

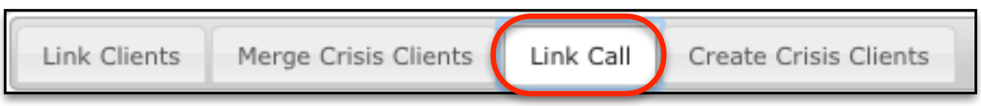

Figure 508 - Link Call Tab

3. The Link Call tab will then appear on screen.

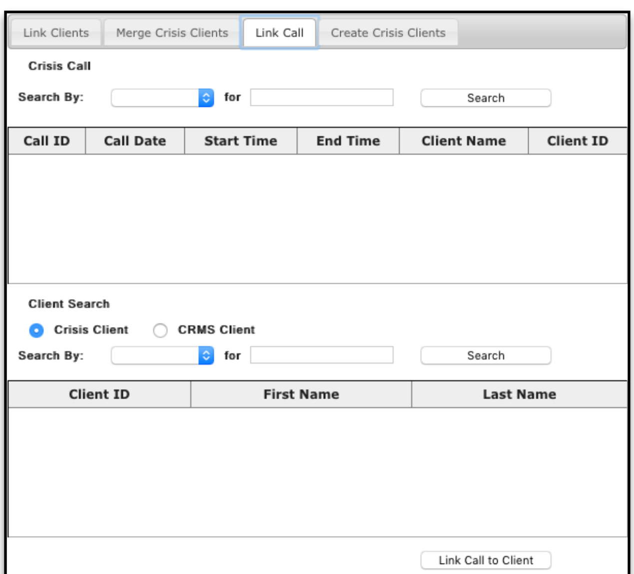

Figure 509 - Link Call Tab

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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.

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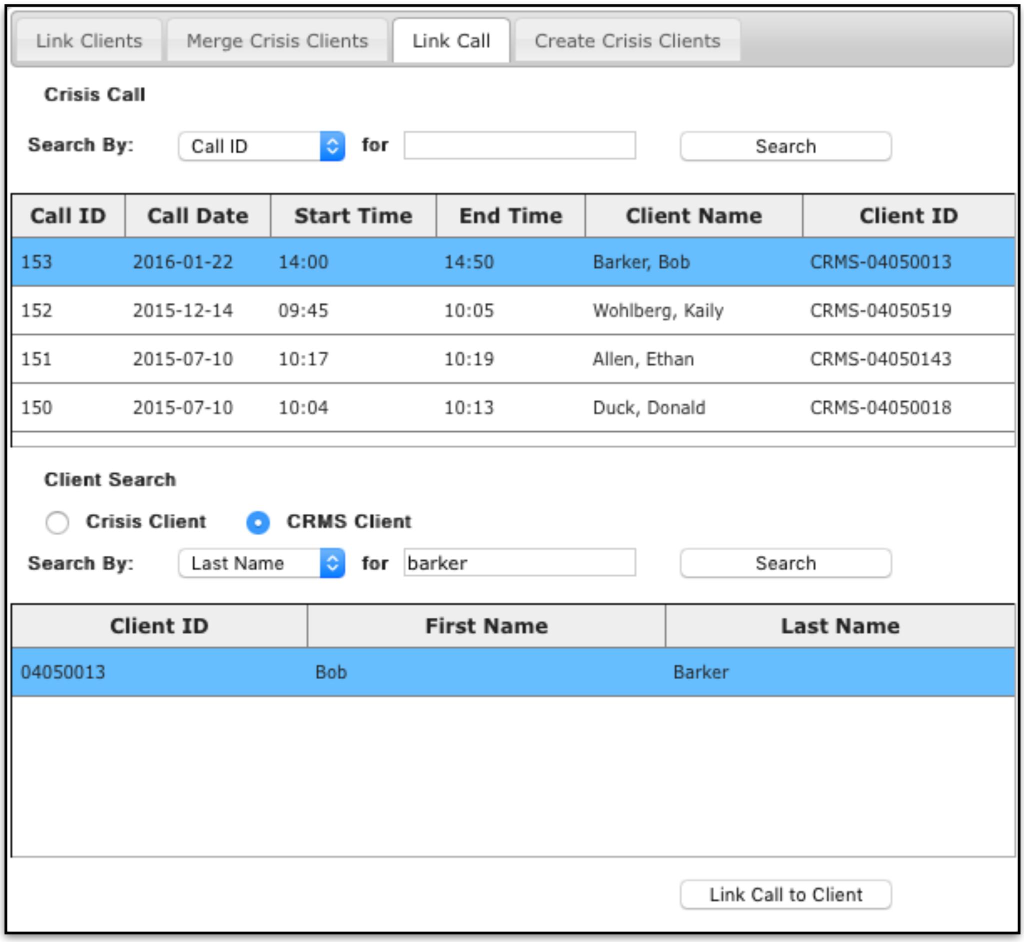

Call ID	Call Date	Start Time	End Time	Client Name	Client ID
153	2016-01-22	14:00	14:50	Barker, Bob	CRMS-04050013
152	2015-12-14	09:45	10:05	Wohlberg, Kaily	CRMS-04050519
151	2015-07-10	10:17	10:19	Allen, Ethan	CRMS-04050143
150	2015-07-10	10:04	10:13	Duck, Donald	CRMS-04050018

Client ID	First Name	Last Name
04050013	Bob	Barker

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.

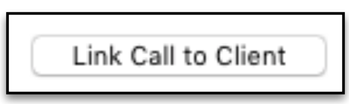

Figure 513 - Link Call to Client

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

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Create Crisis Clients

If necessary, a CRMS Administrator can create a “crisis client” file without the associated phone call. This can 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.

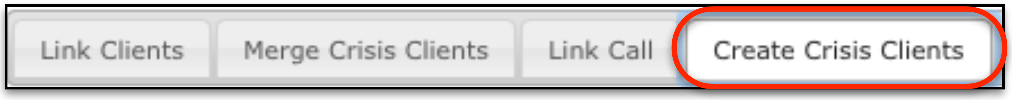

Figure 514 - Create Crisis Clients Tab

3. The Create Crisis Clients tab will then appear on screen.

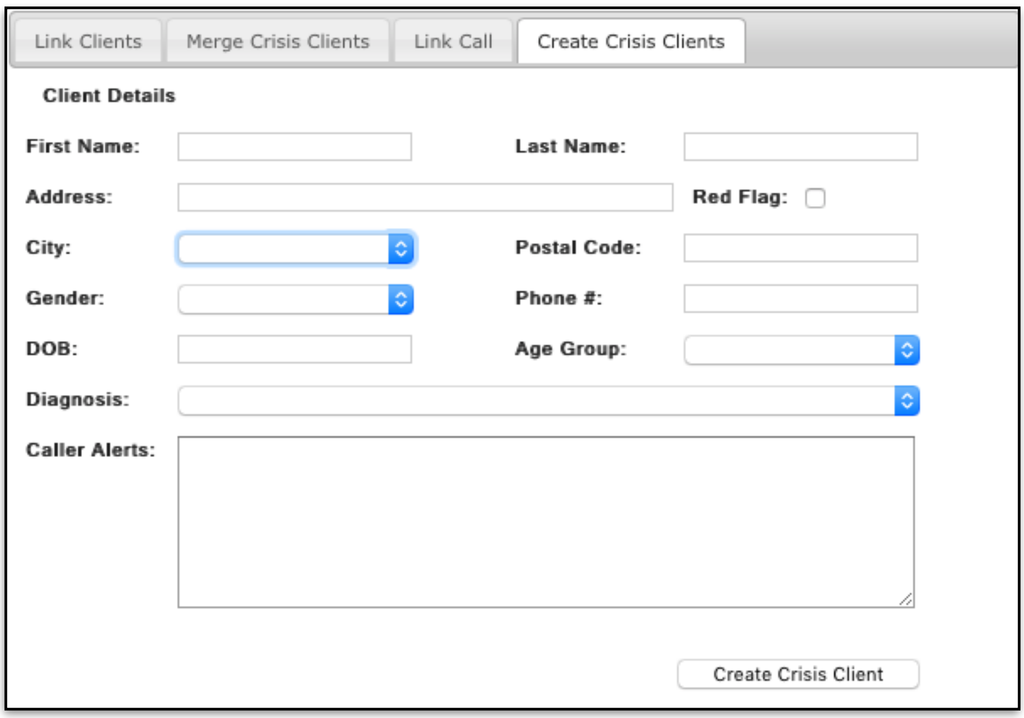

Figure 515 - Create Crisis Clients Tab

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

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

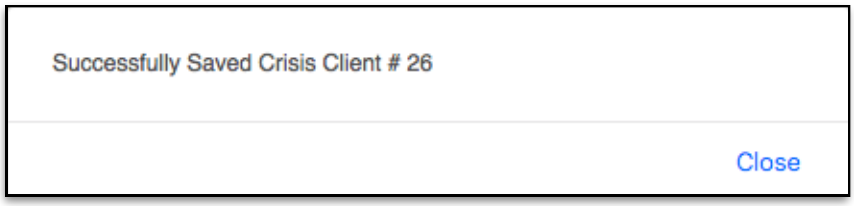

Figure 517 - Successfully Created Crisis Client

6. The newly created crisis client can now be utilized in the Crisis Call Module, or the Crisis Call Administration module.

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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.

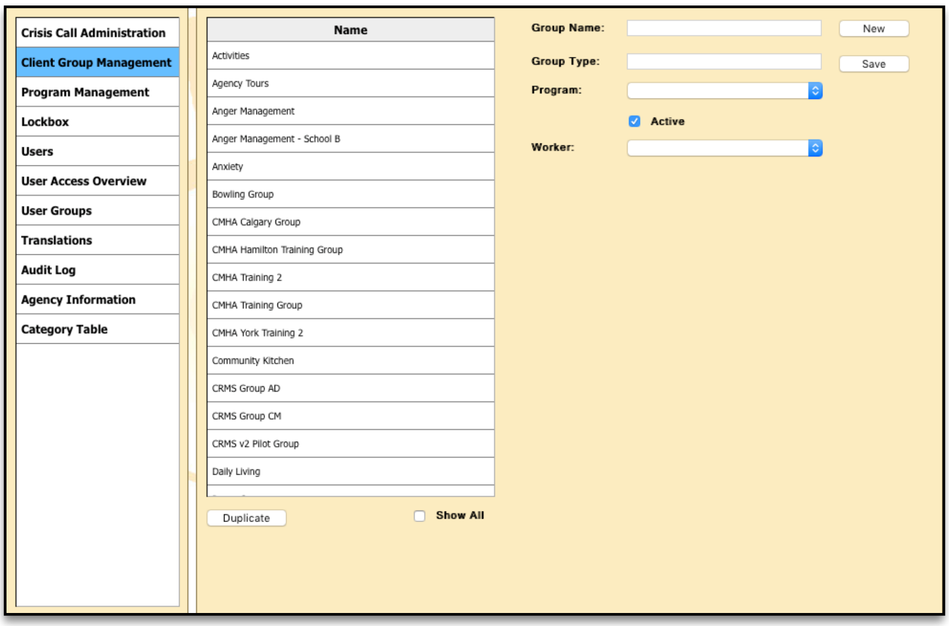

Figure 518 - Client Group Management

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.

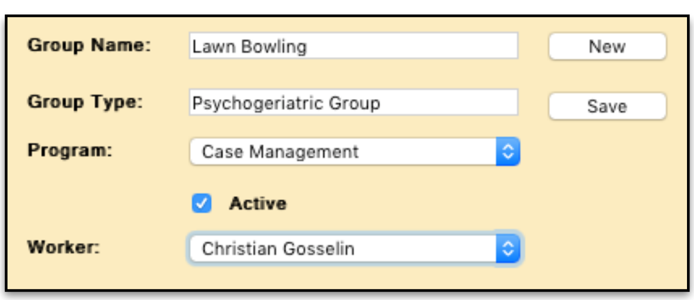

Figure 519 - Creating a New 'Group' Using Client Group Management

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

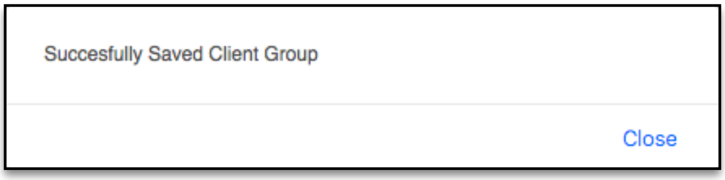

Figure 520 - Successfully Saved Client Group

8. The Groups List will automatically refresh and the newly saved group will appear once refreshed. This is demonstrated in Figure 521 below.

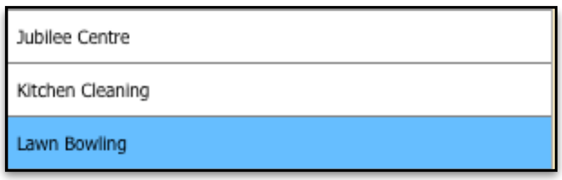

Figure 521 - Reviewing Successfully Created Client Group

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.

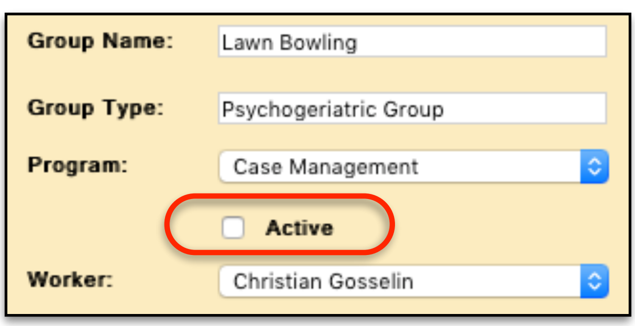

Figure 522 - Deactivating a Client Group

4. Click **Save** to finalize the process.
5. A message box will appear confirming the save was indeed successful.

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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.

Figure 523 - Showing All Client Groups

3. De-activated groups will then re-appear, highlighted in a yellow color as shown in Figure 524.

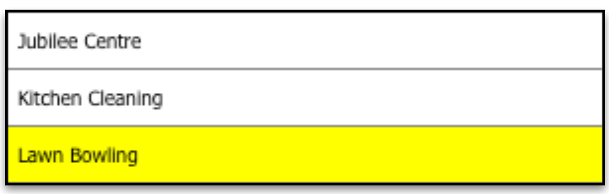

Figure 524 - Reactivating a deactivated Group

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.

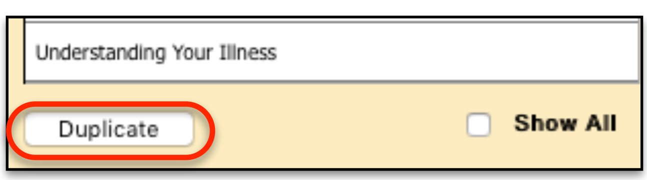

Figure 525 - Duplicating Client Group

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4. A message box will appear confirming the duplication was indeed successful as demonstrated in Figure 526.

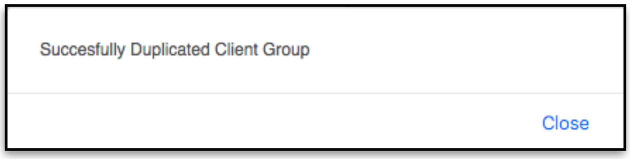

Figure 526 - Successfully Duplicated Client Group

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.

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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 de-activate 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.

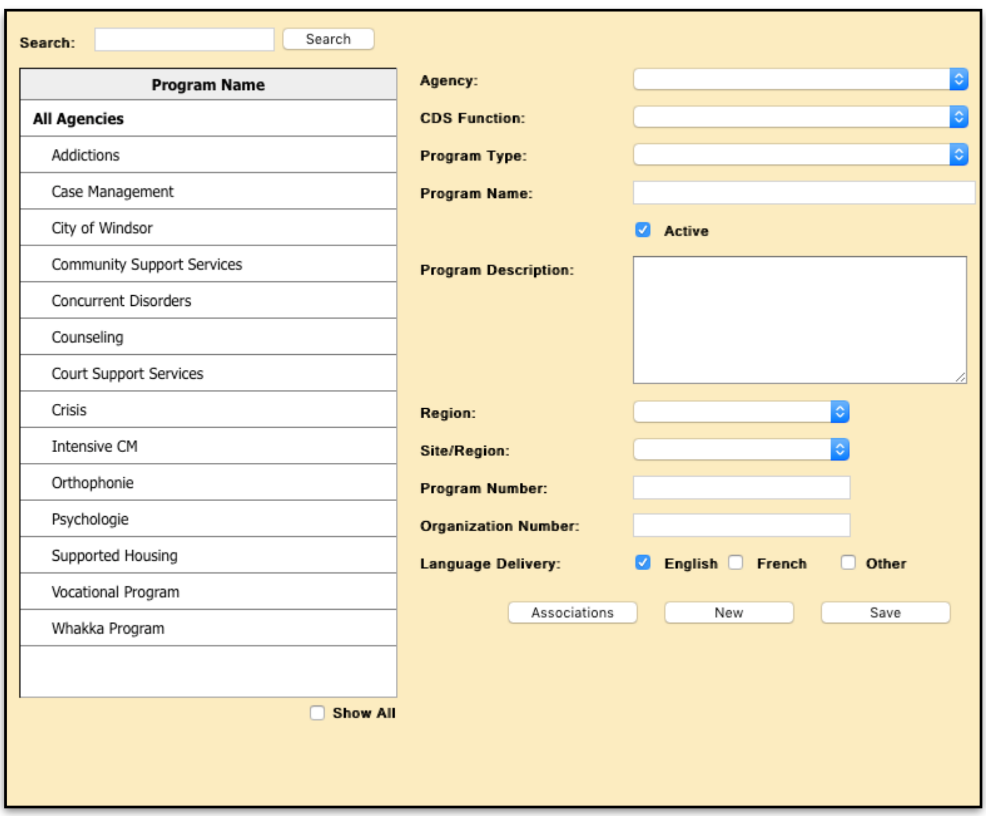

Figure 529 - Program Management Module

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***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.

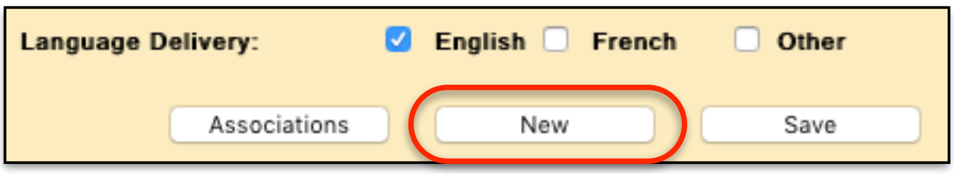

Figure 530 - Creating a New Program

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.

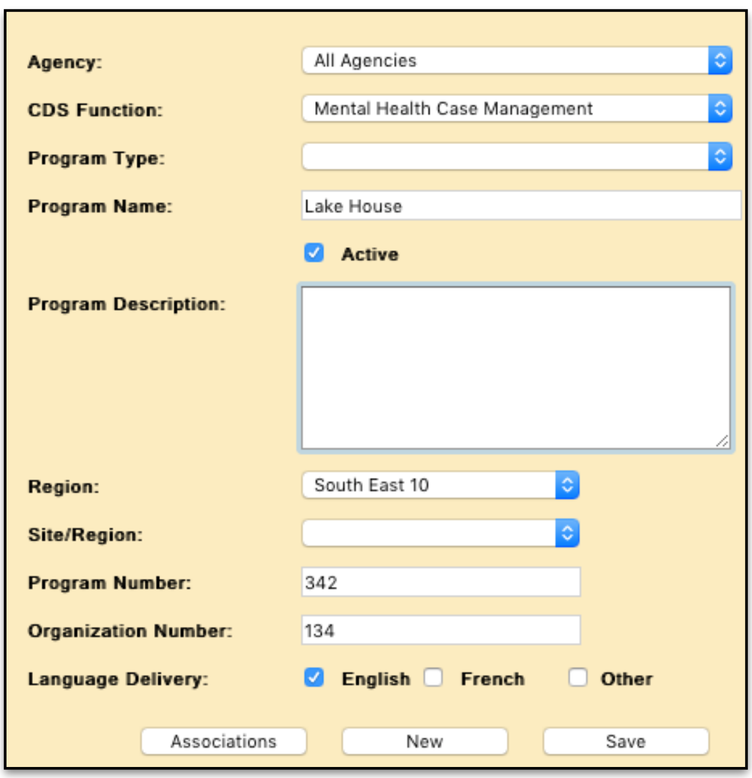

Figure 531 - Creating a New Program

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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.

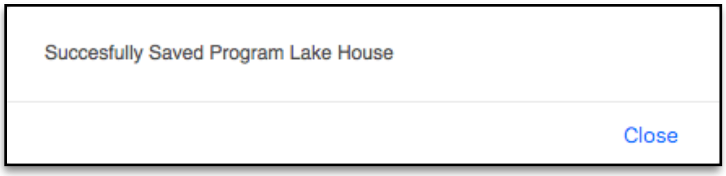

Figure 532 - Successfully Saved New Program

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.

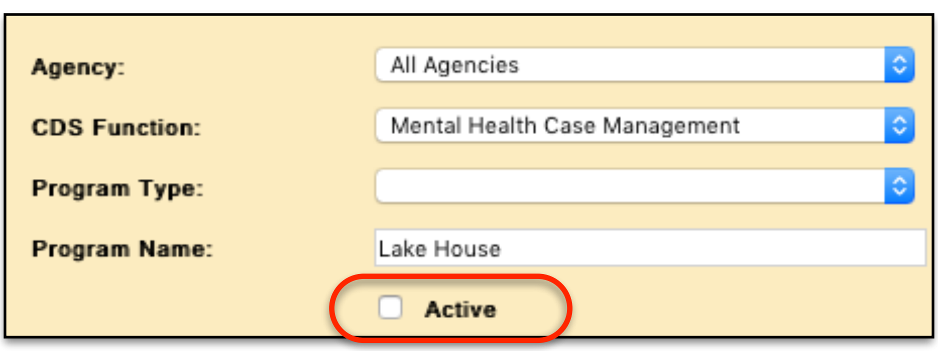

Figure 534 - Deactivating a Program

4. Once finished, click **Save** to finalize the process. A message box will appear confirming the process was indeed successful.

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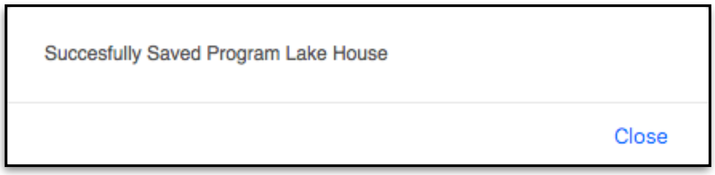

Figure 535 - Successfully Deactivated Program

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.

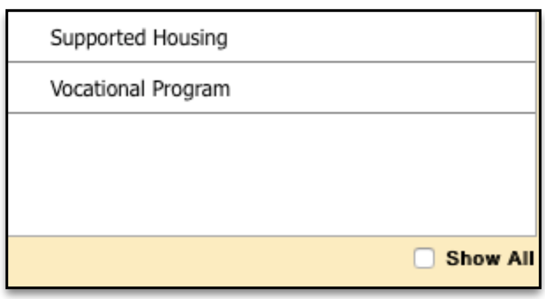

Figure 536 - Showing All Programs

5. The list of programs will refresh and inactive programs will appear highlighted in yellow.

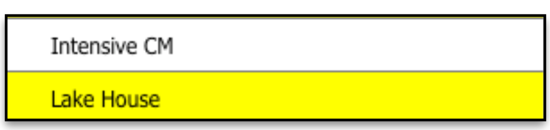

Figure 537 - Selecting an Inactive Program for Reactivation

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’.

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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.

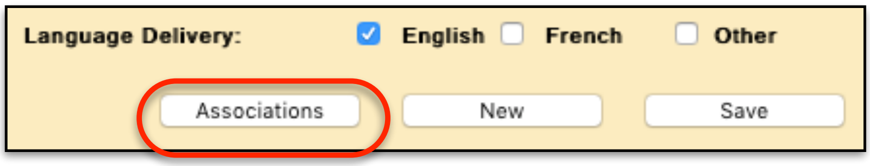

Figure 538 - Program Associations

4. The **Associations** dialog will then appear on screen as shown in Figure 539.

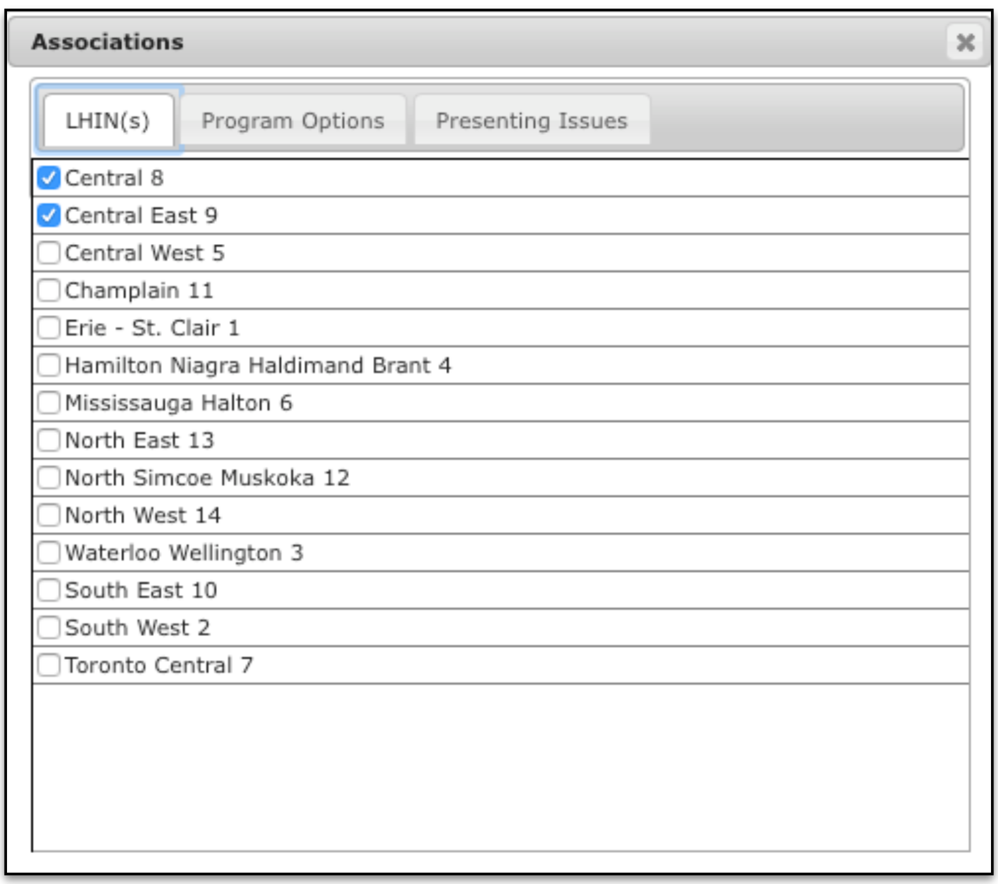

Figure 539 - Program Associations Dialog

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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.

Figure 540 - Pre-populating a Program's LHIN

8. To configure **Program Options**, click on the Program Options tab as identified in Figure 541.

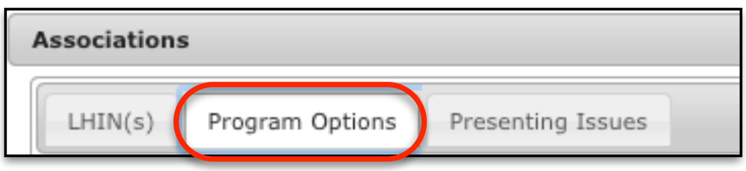

Figure 541 - Program Options

9. The Program Options tab will then appear on screen.

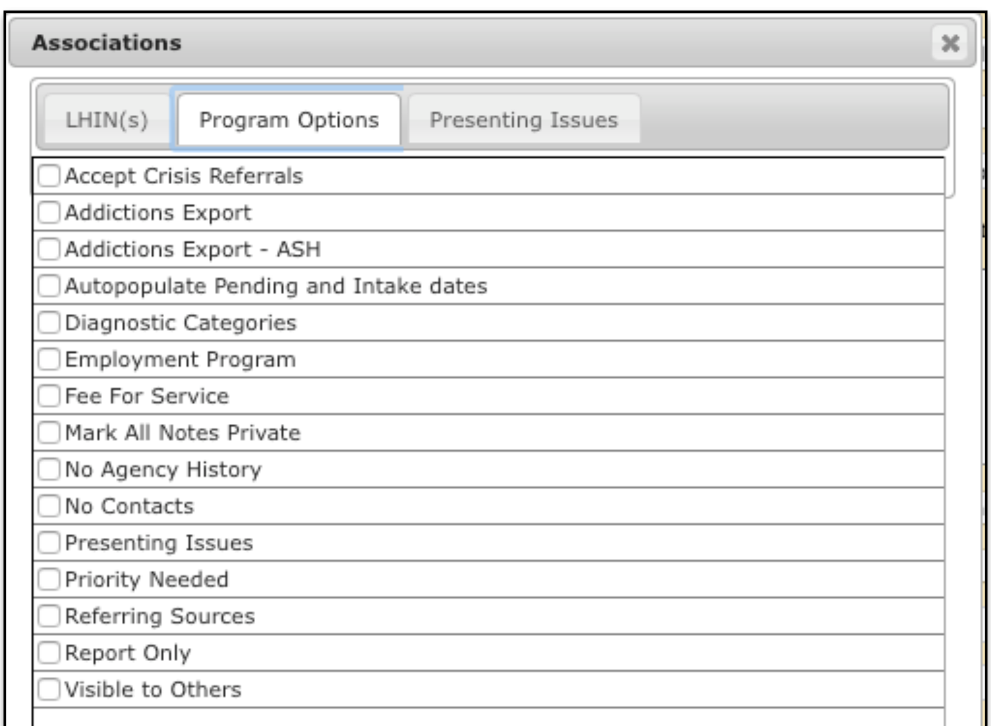

Figure 542 - Program Options

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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**'.

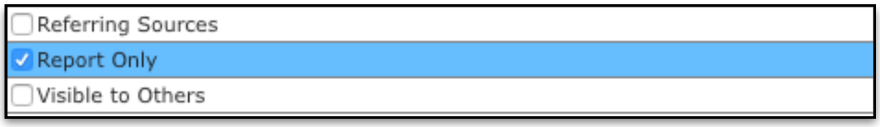

Figure 543 - Configuring Program Options

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.

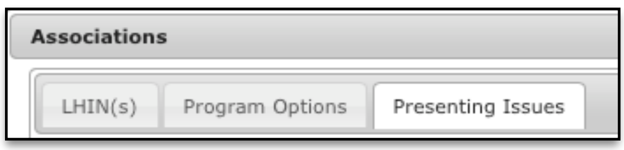

Figure 544 - Pre-populating Presenting Issues

13. In Figure 545, a CRMS Administrator has configured presenting issues for a particular program.

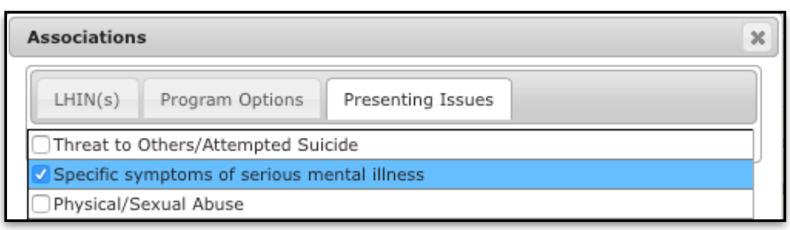

Figure 545 - Pre-populating a Presenting Issue

14. To save the changes, simply close the window - changes will be automatically saved. A message box will confirm the process.

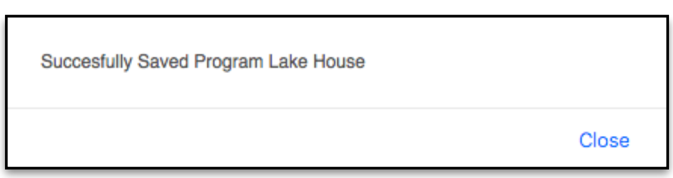

Figure 546 - Successfully Saved Program Options

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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.

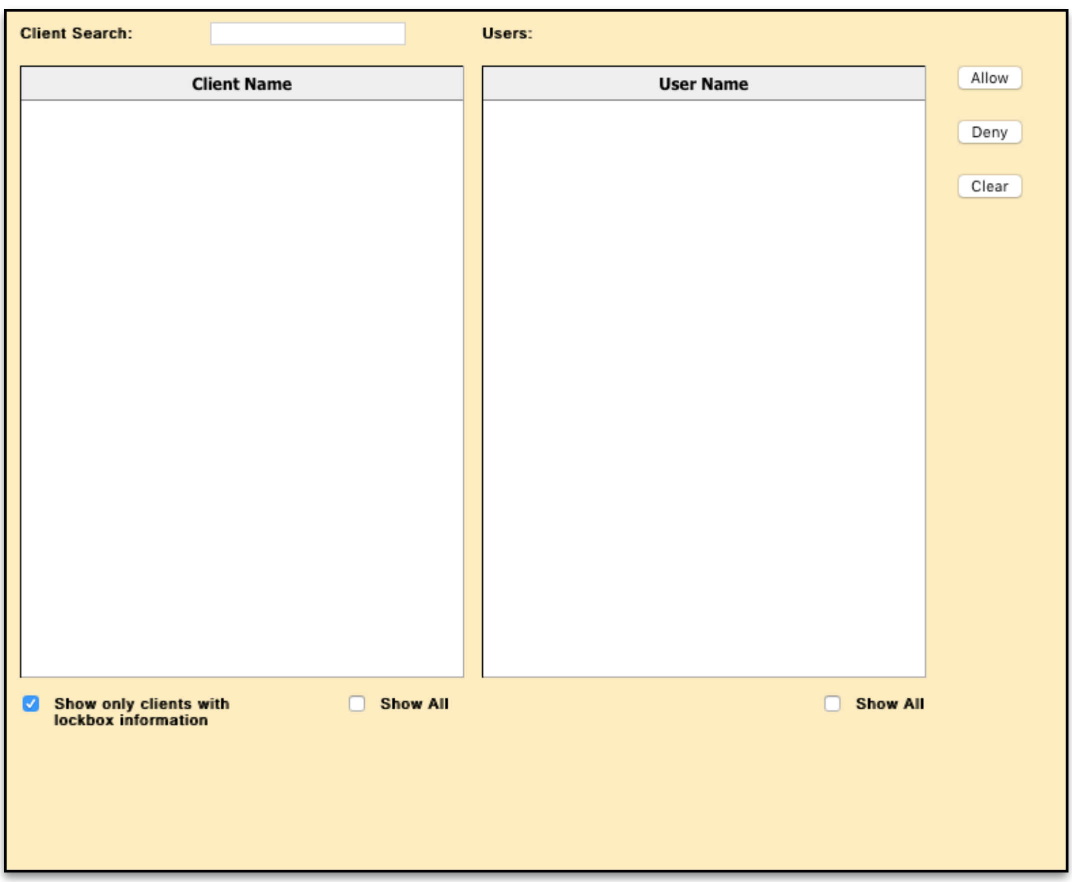

Figure 548 - Lockbox Module

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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.

Figure 549 - Configuring Lockbox

3. The "Client List" will then automatically refresh as seen in Figure 550.

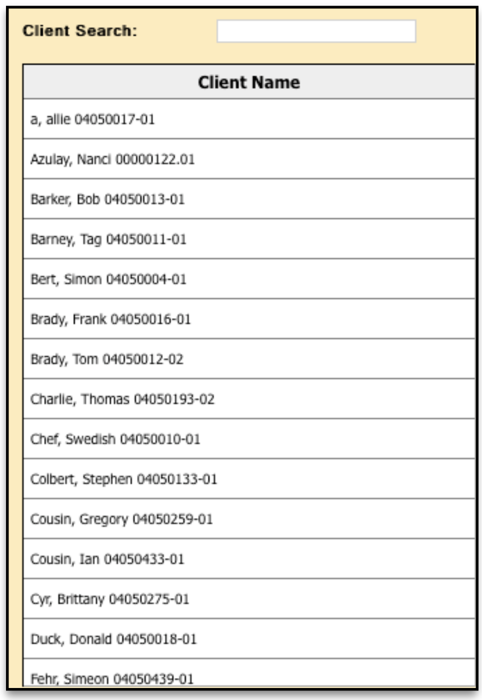

Figure 550 - Client List Now Populated

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'.

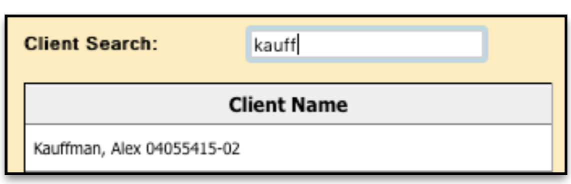

Figure 551 - Searching for a Client to Add to Lockbox

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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.

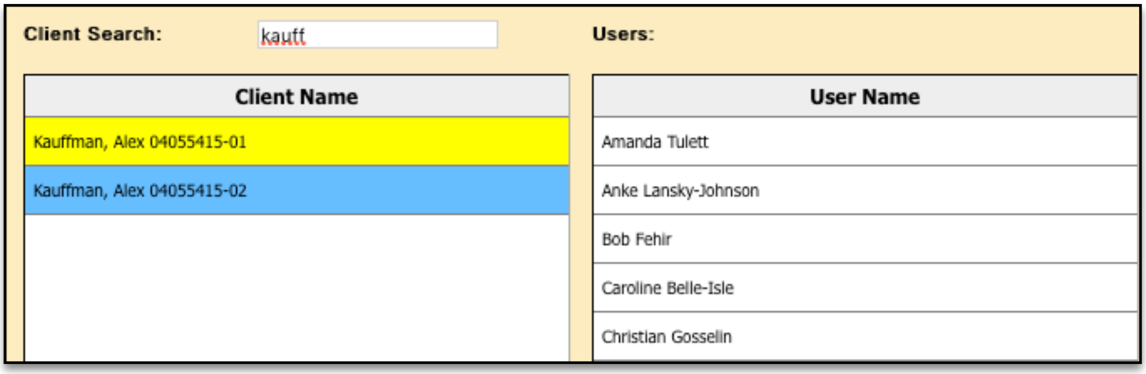

Figure 552 - Selecting Client to Configure Lockbox

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.

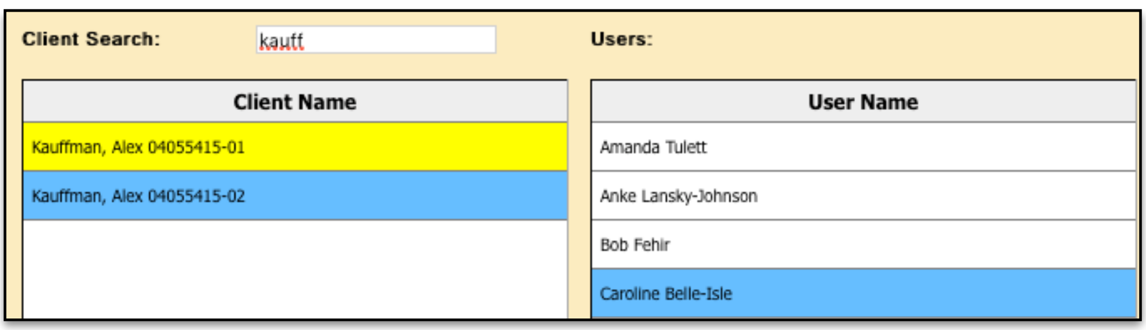

Figure 553 - Configuring Lockbox for a Client / User

12. After having selected both the client and user, click on either **Allow** or **Deny** as necessary for this client/user.

Figure 554 - Allowing or Denying Access to a Particular Client Using Lockbox

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13. A message box will appear confirming the process.

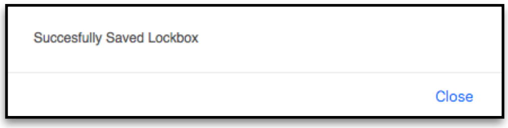

Figure 555 - Successfully Configured Lockbox

14. Clicking on **Deny** will cause the user name to appear in **red**, identifying they have been denied access to this particular client.

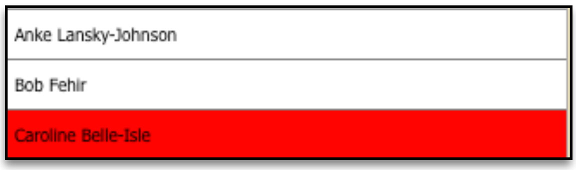

Figure 556 - User Has Been Denied Access to a Client File

15. Clicking on **Allow** will cause the user name to appear in **green**, identifying they have been given access to this particular client.

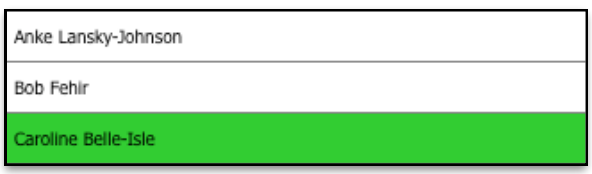

Figure 557 - User Has Been Given Access to a Client File

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.

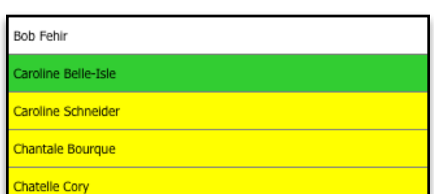

Figure 559 - Configuring Lockbox for 'Not Active' User Accounts

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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.

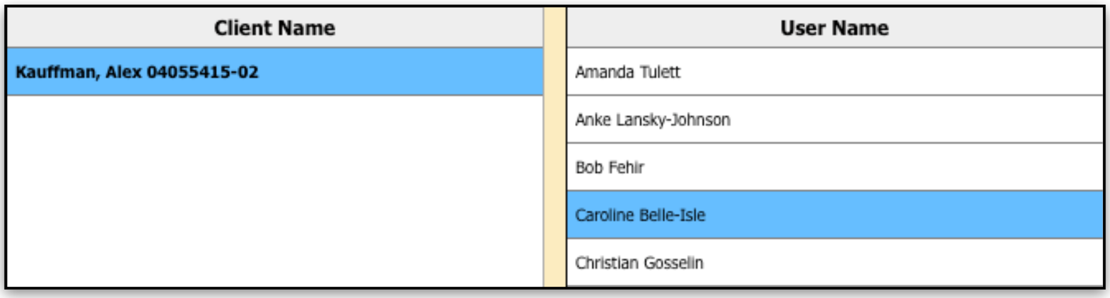

Figure 560- Removing Client from Lockbox

5. Click on **Clear** to remove the Lockbox for this particular client/user.

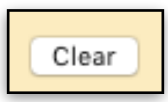

Figure 561 - Clearing Lockbox Information

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

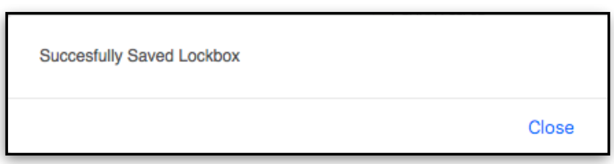

Figure 562 - Successfully Saved Lockbox

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.

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2. At the bottom of the Lockbox client list, check off the **Show All** checkmark as seen in Figure 563.

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’.

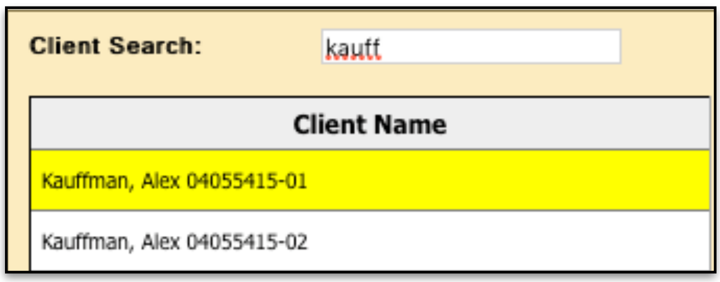

Figure 564 - Configuring Lockbox for Multiple Client Referrals

5. Refer to the instructions above for either allowing or denying access to these client files.

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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.

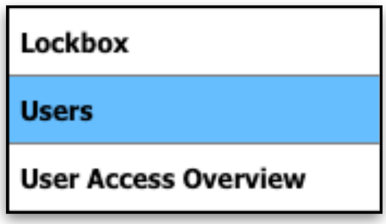

Figure 565 - Users Module

3. The Users module will then appear on screen as illustrated in Figure 566.

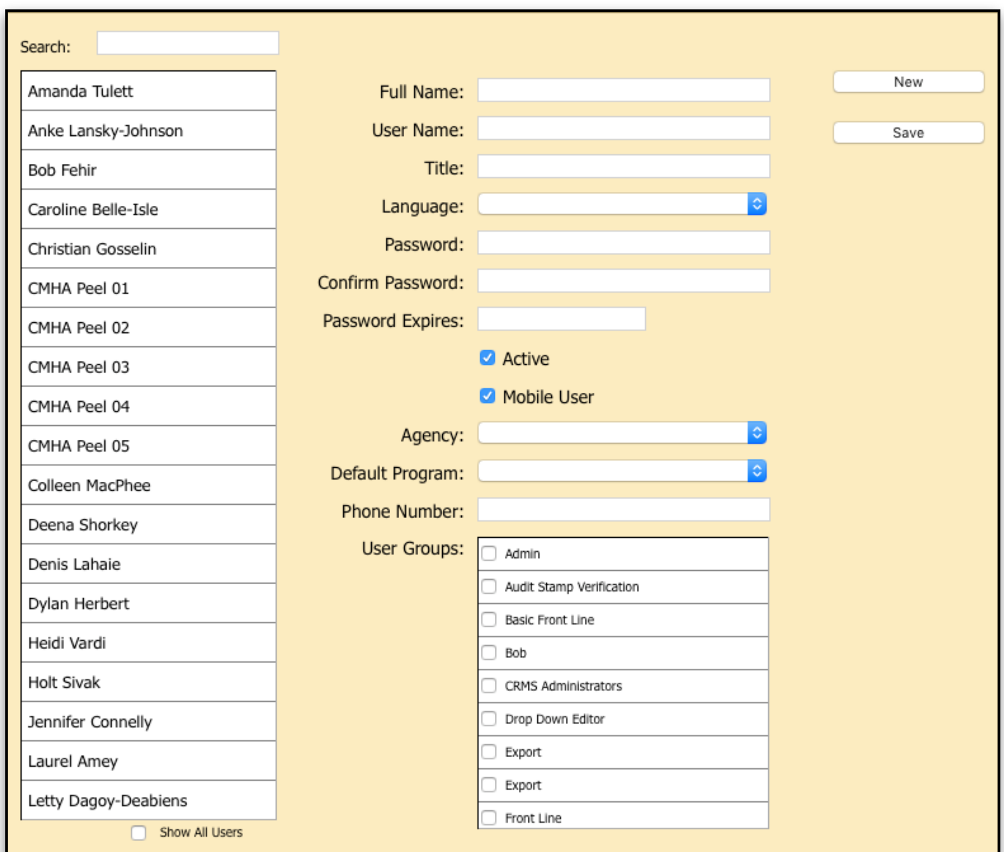

Figure 566 - Users Module

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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.

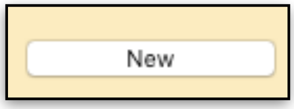

Figure 567 - Creating a New User Account

3. Fill out the necessary fields.
4. Figure 568 demonstrates a CRMS Administrator in the process of creating a user account.

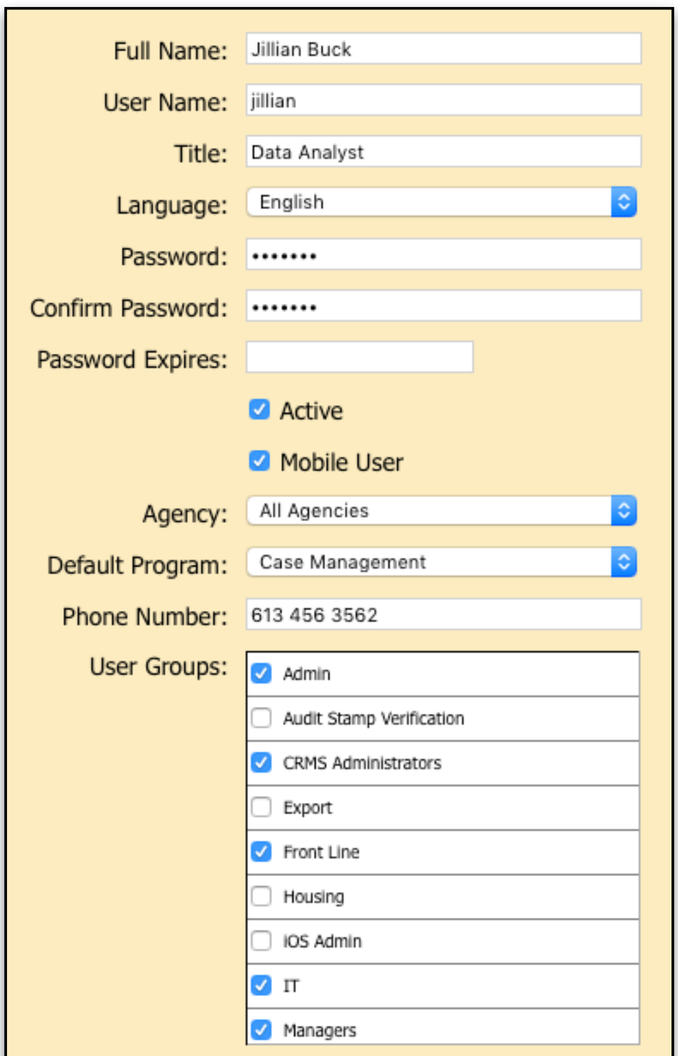

Figure 568 - Creating a New User Account

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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.

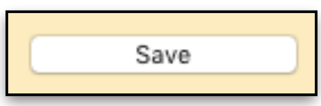

Figure 569 - Saving a New User Account

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.

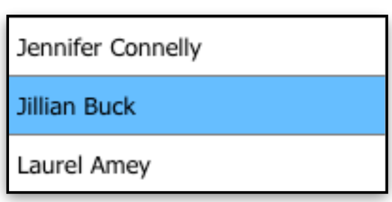

Figure 571 - Reviewing Newly Created User Account

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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.

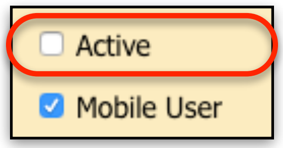

Figure 572 - De-activated a User Account

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

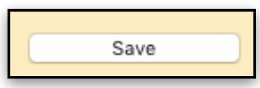

Figure 573 - Saving User Account

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.

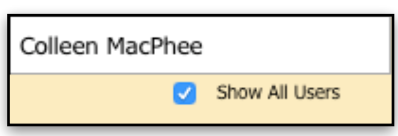

Figure 574 - Showing All Users

5. Locate the 'not active' user account. 'Not Active' users are highlighted in yellow.

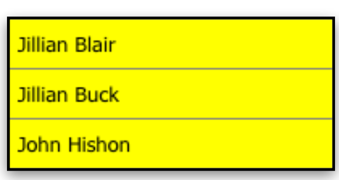

Figure 575 - Locating a 'Not Active' User Account

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6. Click on the desired user account which will be re-activated.
7. **Recheck** the ‘Active’ check mark.

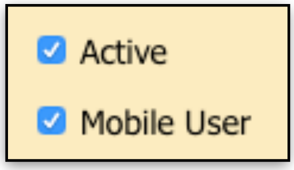

Figure 576 - Re-activating a User Account

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.

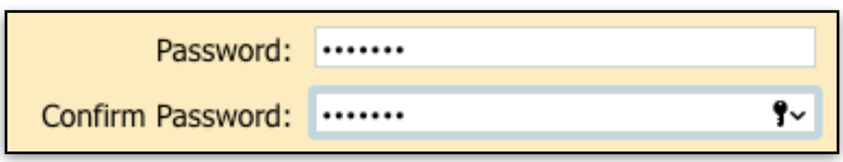

Figure 577 - Performing a Password Reset

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**.

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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.

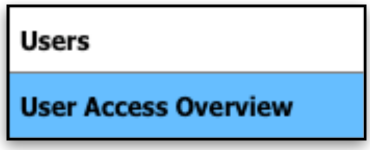

Figure 578 - User Access Overview Module

3. The User Access Overview module will then appear on screen as demonstrated in Figure 579.

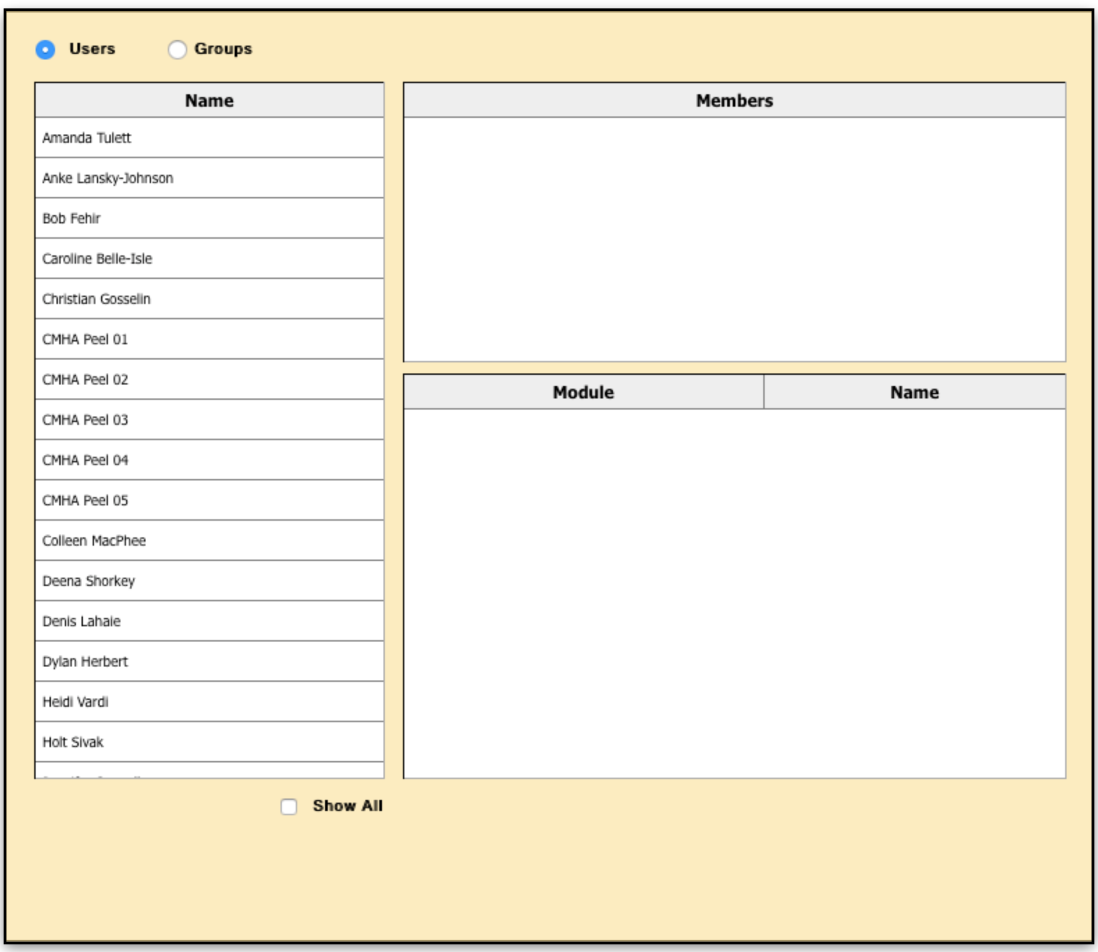

Figure 579 - User Access Overview

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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’.

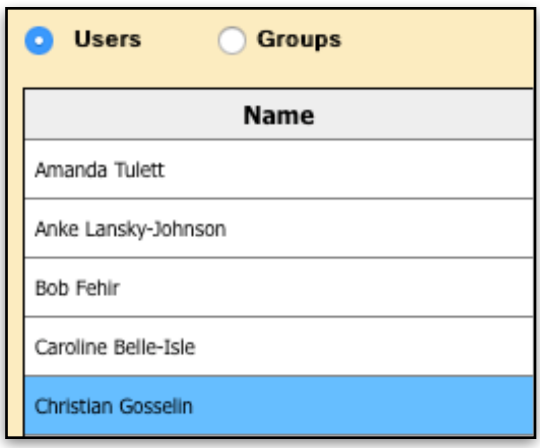

Figure 581 - Selecting User Account to Review

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.

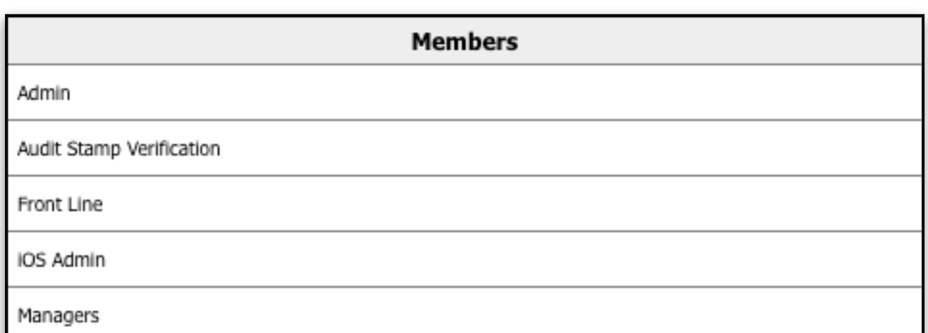

Figure 582 - Reviewing User Group Membership for a User Account

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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.

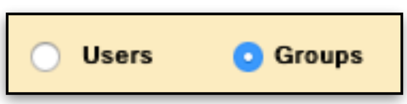

Figure 584 - Reviewing from the 'Groups' POV

5. From the list of available User Groups, **click** to select the desired Group to review.

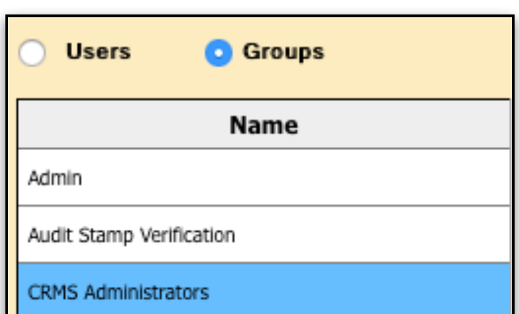

Figure 585 - Selecting User Group to Review

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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 Lahaie
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.

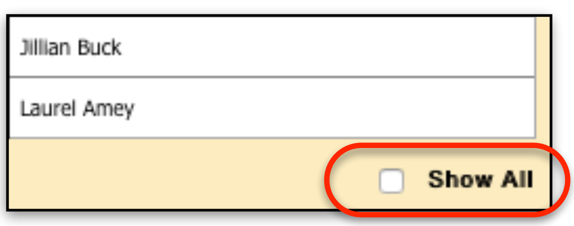

Figure 588 - Showing All User Account / User Groups

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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.

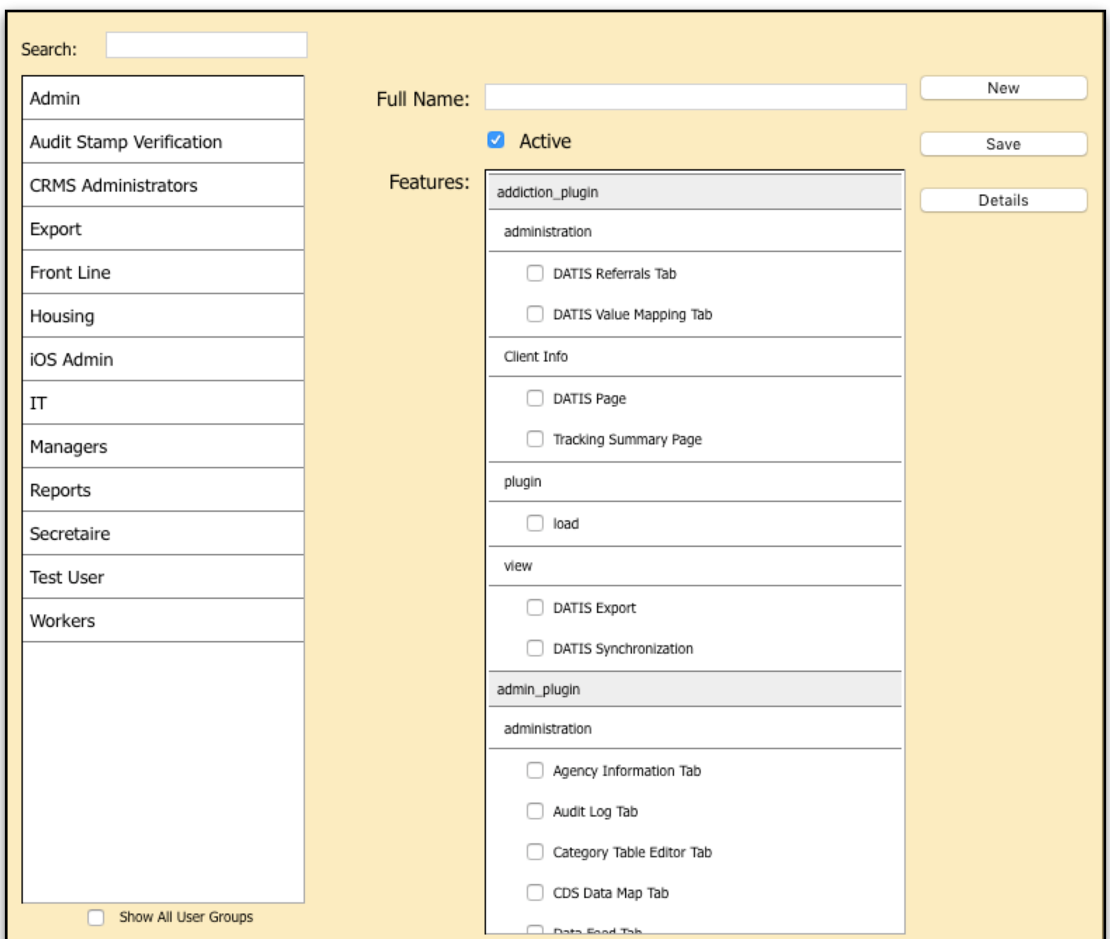

Figure 590 - User Groups Module

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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.

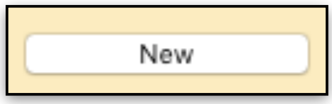

Figure 591 - Creating a New User Group

3. Provide a user group name as seen in Figure 592.
4. As well, ensure the 'Active' check mark is checked.

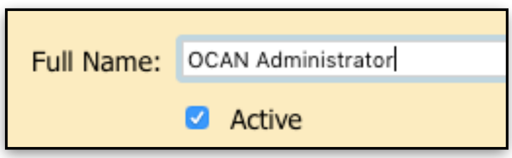

Figure 592 - Entering User Group Name

5. Check out the necessary access rights in the **Features** list.

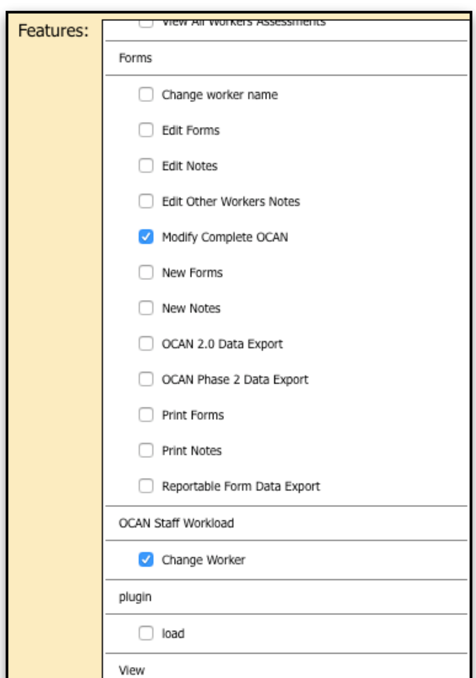

Figure 593 - Assigning Access Rights to User Group

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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.

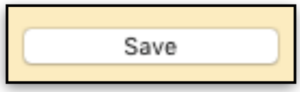

Figure 594 - Saving User Group

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'.

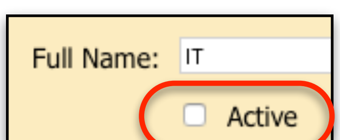

Figure 596 - De-activating a User Group

5. Click **Save** to finalize the process.
6. The newly de-activated user group will then vanish from the list.

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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.

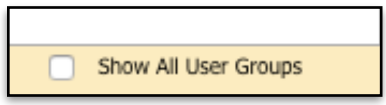

Figure 597 - Showing All User Groups

3. The User Group List will automatically refresh and 'not active' user groups will then be displayed in a yellow highlighted color.

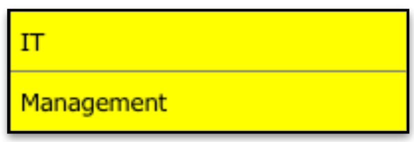

Figure 598 - Locating a 'Not Active' User Group

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.

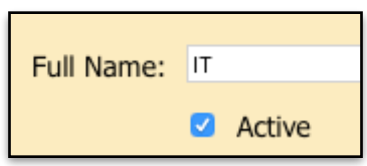

Figure 599 - Re-activating a User Group

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'**.

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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**.

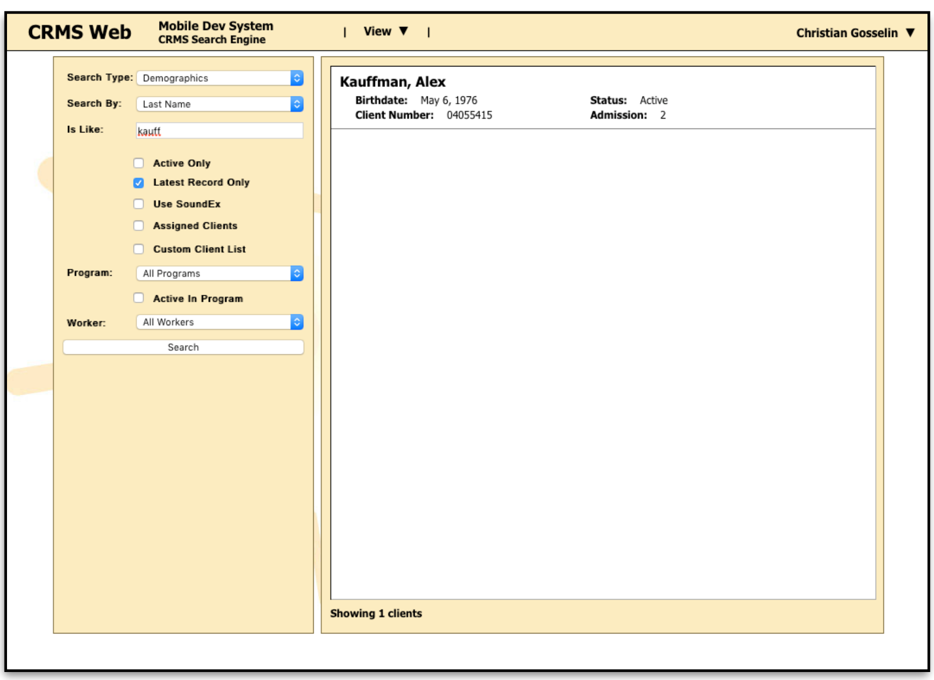

Figure 600 - Client Search Security Layer Example

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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.

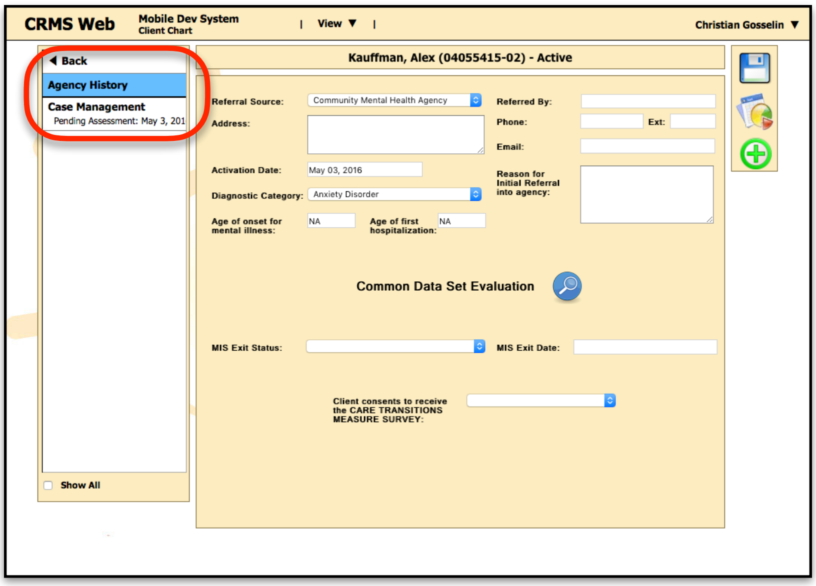

Figure 601 - Agency History Security Layer Example

5. Note in Figure 602 however, that the ‘*Addictions*’ program is indeed **visible** as this user **DOES** have the necessary access rights.

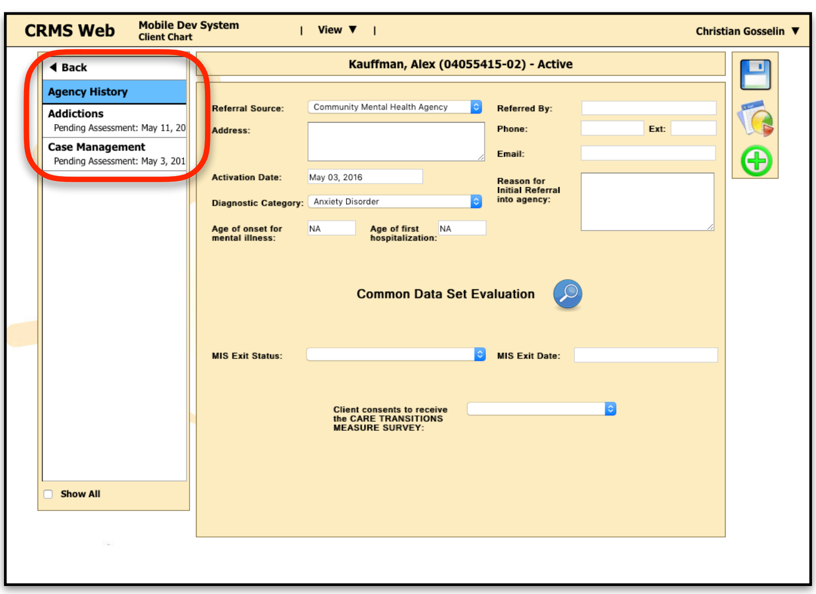

Figure 602 - Agency History Security Layer Example

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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.

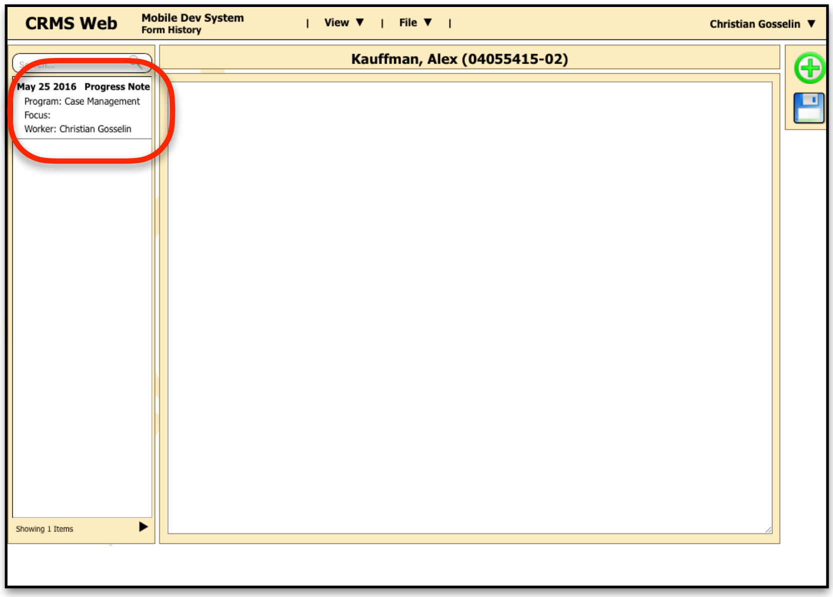

Figure 603 - Forms History Security Layer Example

5. Note in Figure 604 however, that the '*Addictions*' program is indeed **visible** as this user **DOES** have the necessary access rights.

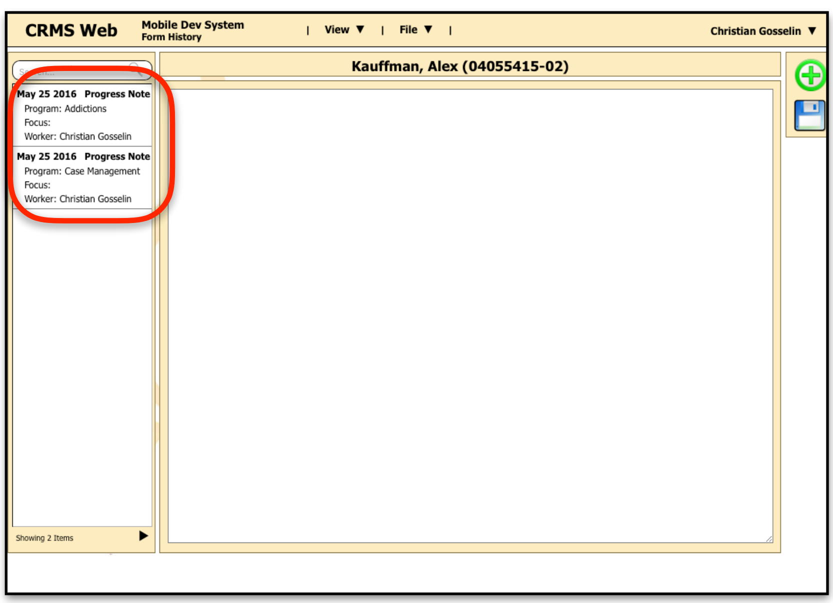

Figure 604 - Forms History Security Layer Example

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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.

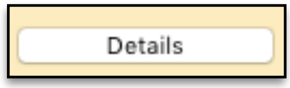
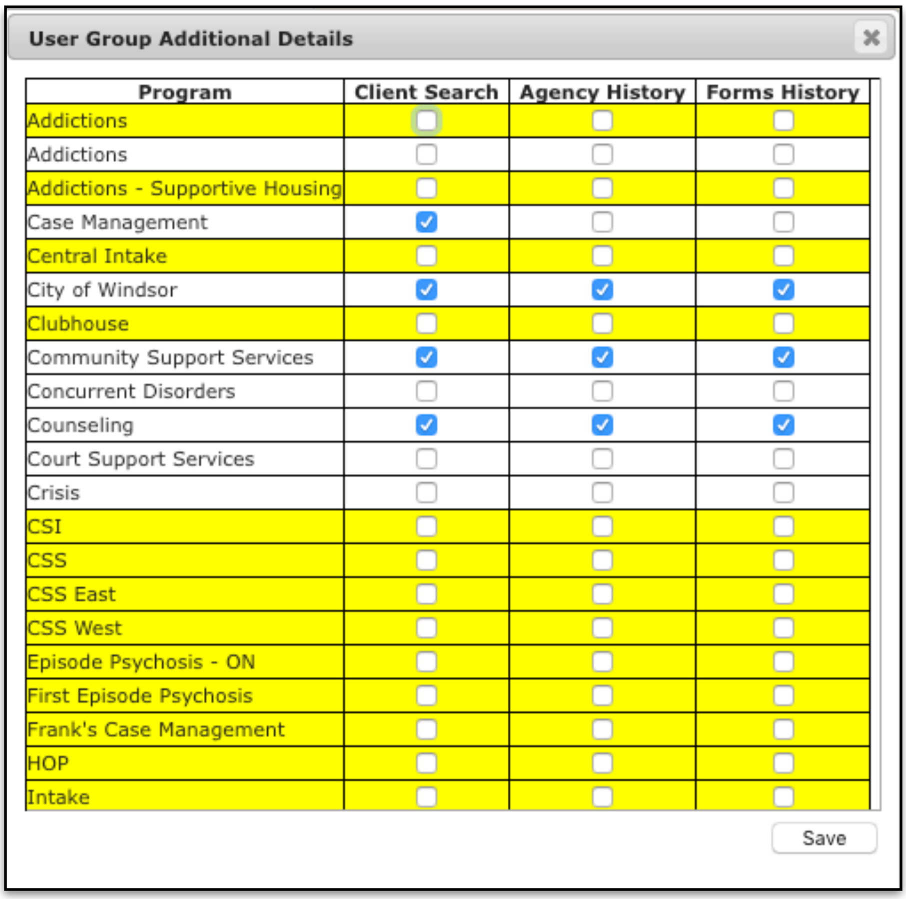


Figure 605 - Access User Group Details

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	☐	☐	☐

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.

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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.

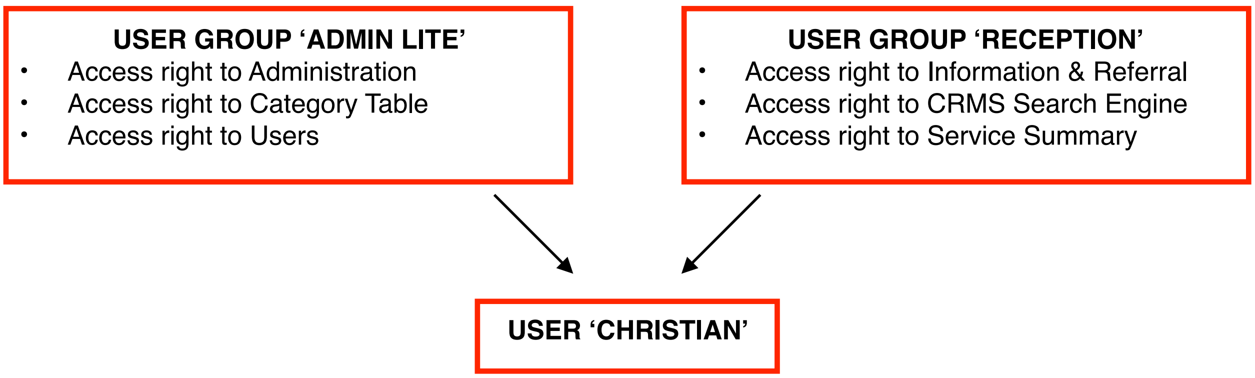

Figure 607 - User / User Group Example

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.

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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.

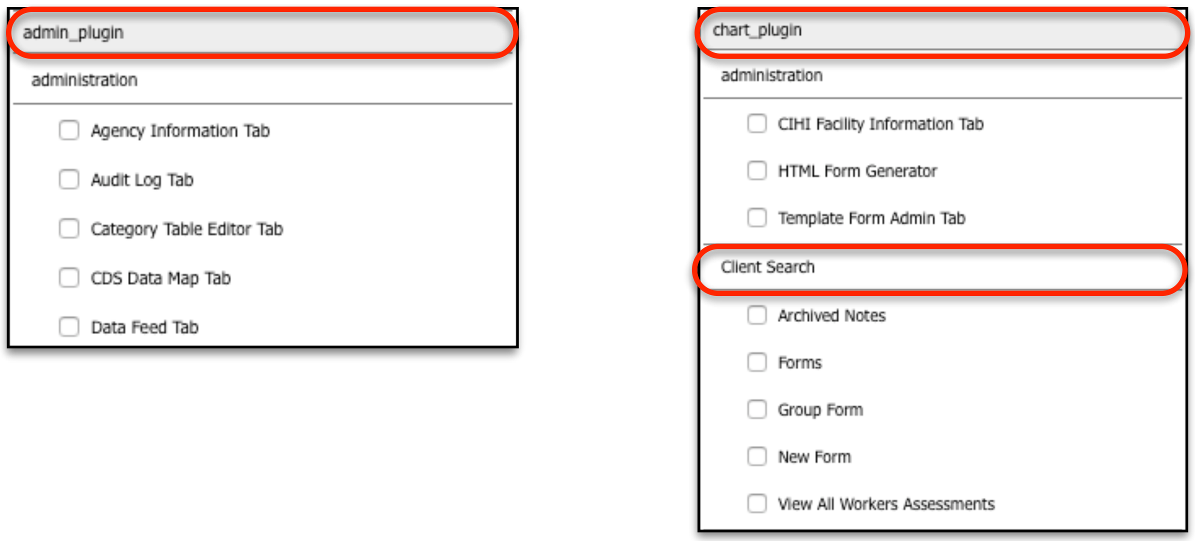
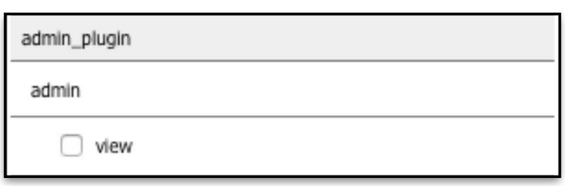


Figure 608 - Plugin Grouping

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 —> **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.

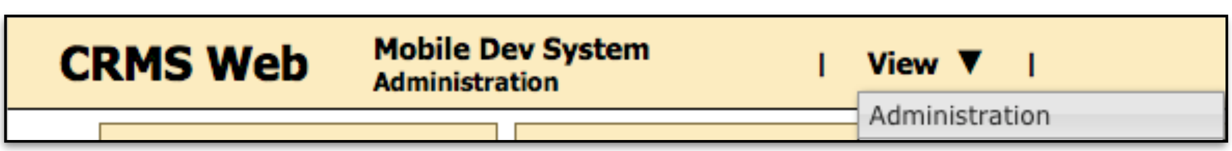


Figure 609 - Admin_Plugin - 'View' Access Right

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.

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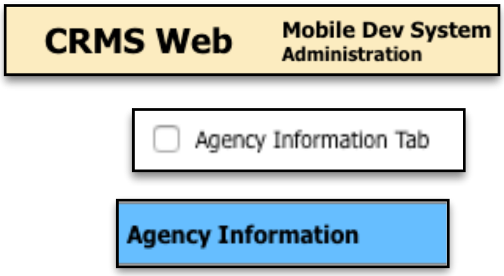
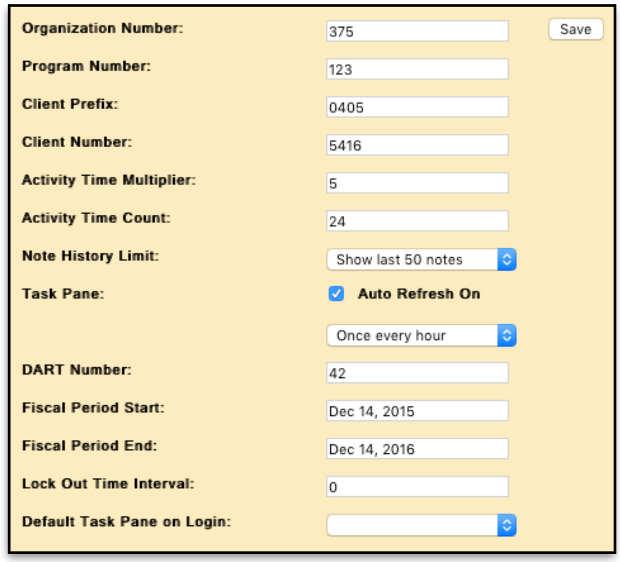
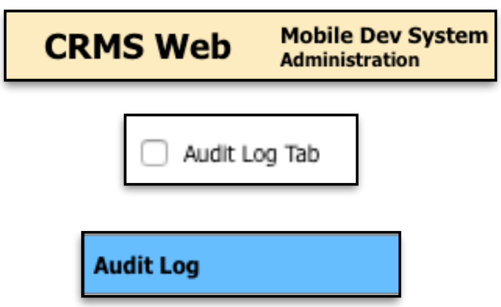


Admin_Plugin —> **Agency Information Tab =** Grants access to the Administration Module “Agency Information”

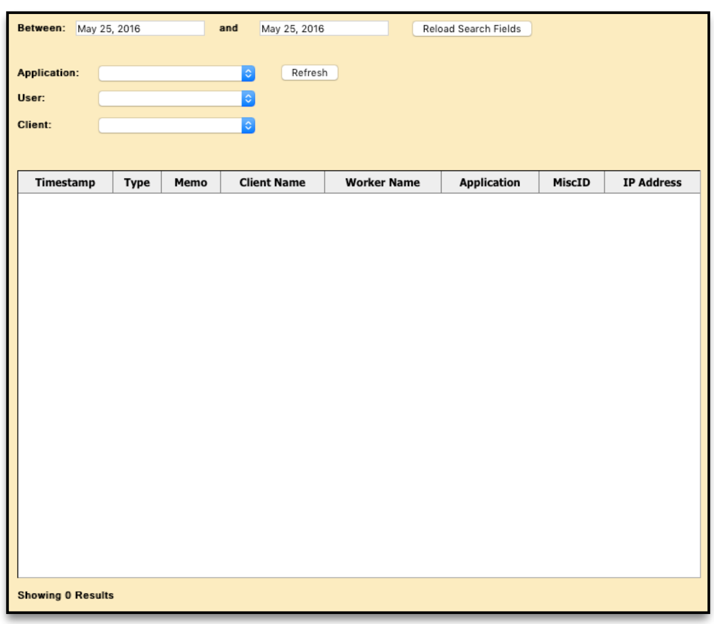


The **Agency Information Tab** allows CRMS Administrators to configure their organization and program number, client file number generation system, activity time interval and total length, default note history limit, task pane auto-refresh/interval, screen inactivity lock out time interval, and default task pane on login. **NOTE* - The ‘Fiscal Period Start/End’ is exclusively for the school board modules. Mental health agencies don’t need to input these settings.*

Figure 610 - Agency Information Tab Access Right



Admin_Plugin —> **Audit Log Tab** = Grants access to the Administration Module “Audit Log”



The **Audit Log Tab** allows CRMS Administrators to review the transactions which have occurred within the CRMS system by the users. Every action in the software is logged in order to comply with PHIPA. The Audit Log Tab allows Administrators to perform audits or reviews for clients if requested or to ensure compliancy with staff. Administrators can filter by date, application, user, or client.

Figure 611 - Audit Log Tab Access Right

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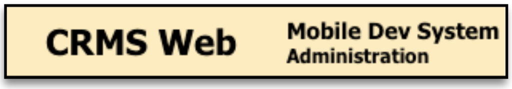
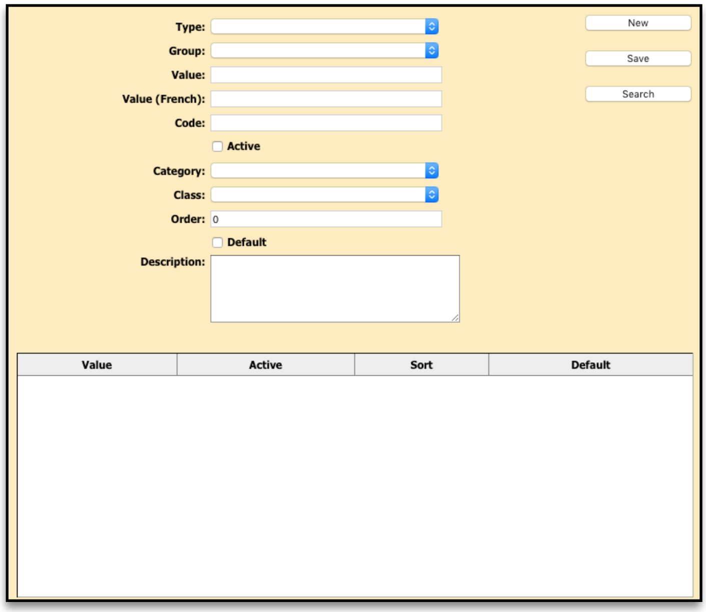
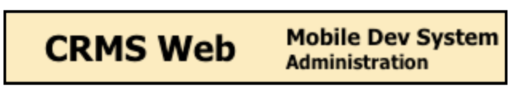


Admin_Plugin —> **Category Table Editor Tab** = Grants access to the Administration Module "Category Table"

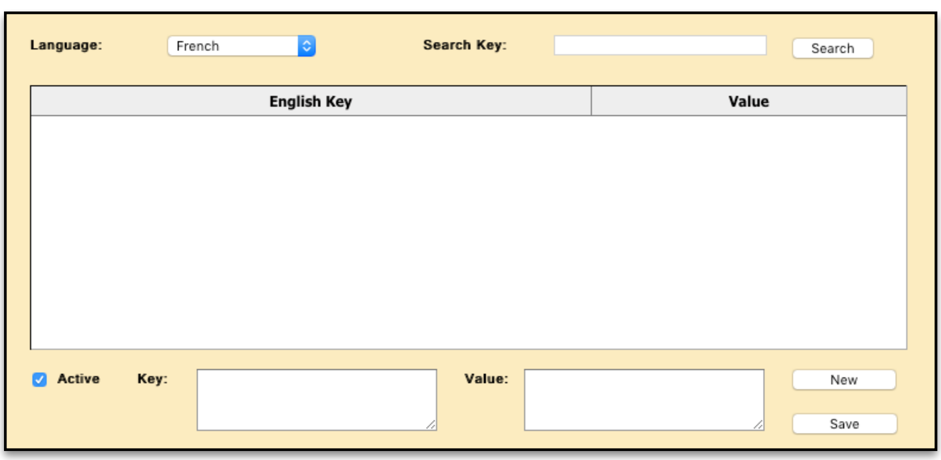


The **Category Table Tab** allows CRMS Administrators to modify, add, or remove drop down values to the menus located throughout CRMS. CRMS Administrators can also configure the default of a particular menu, along with the desired sort order to better suit the needs of the users. ***NOTE*** - Some menus are hidden from Administrators are they are defined by the MOHLTC.

Figure 612 - Category Table Editor Access Right



Admin_Plugin —> **Translation Tab** = Grants access to the Administration Module "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.

Figure 613 - Translation Tab Access Right

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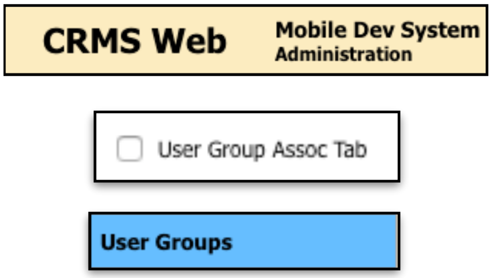


Admin_Plugin —> **User Group Assoc Tab** = Grants access to the Administration Module "User Groups"

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.

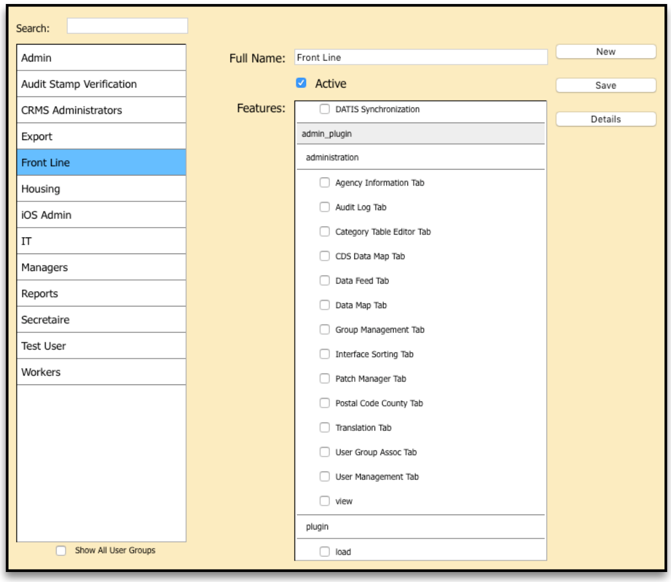
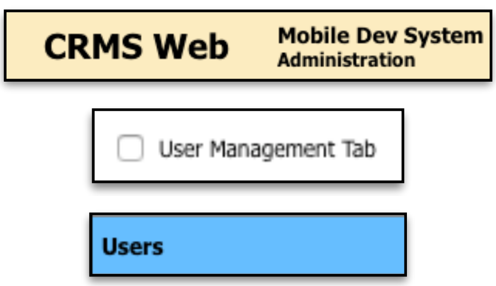


Figure 614 - User Group Assoc Access Right



Admin_Plugin —> **User Management Tab** = Grants access to the Administration Module "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.

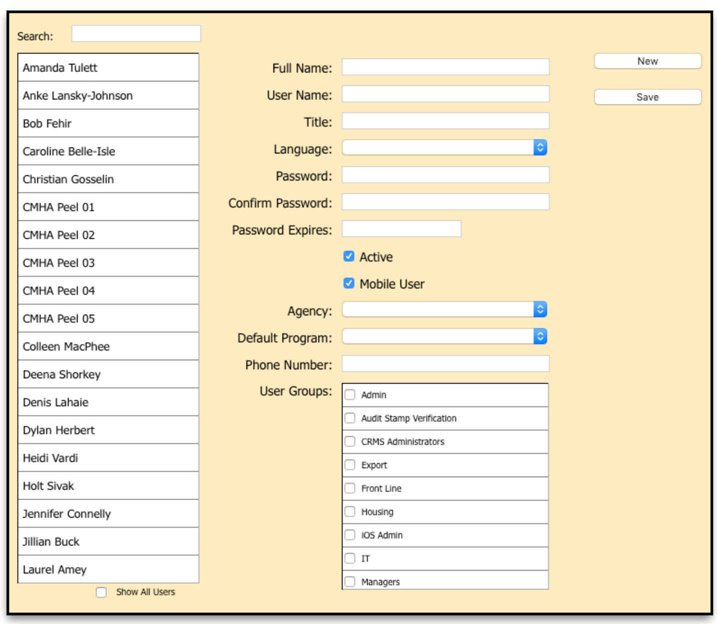


Figure 615 - User Management Tab Access Right

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Client_demographics_plugin —> **Client Lock Box Tab** = Grants access to the Administration Module “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.

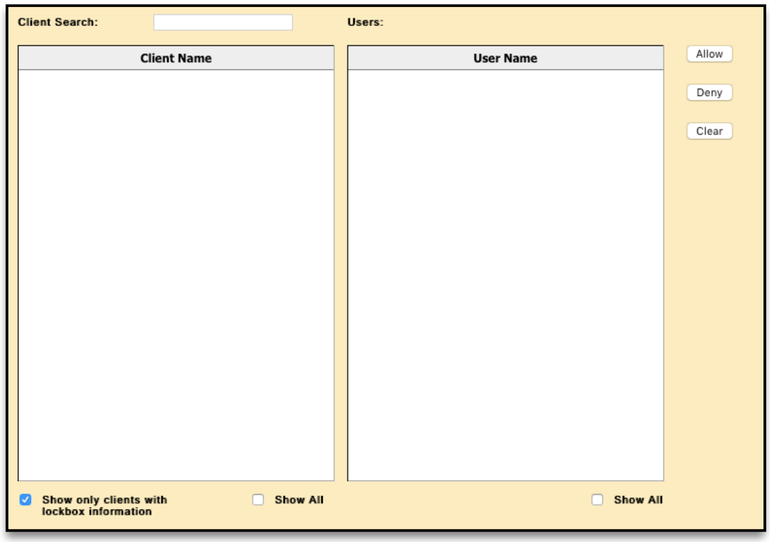
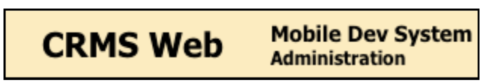
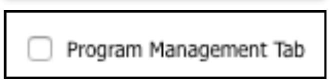


Figure 616 - Client Lock Box Tab Access Right



Client_demographics_plugin —> **Program Management Tab =** Grants access to the Administration Module “Program Management”



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.

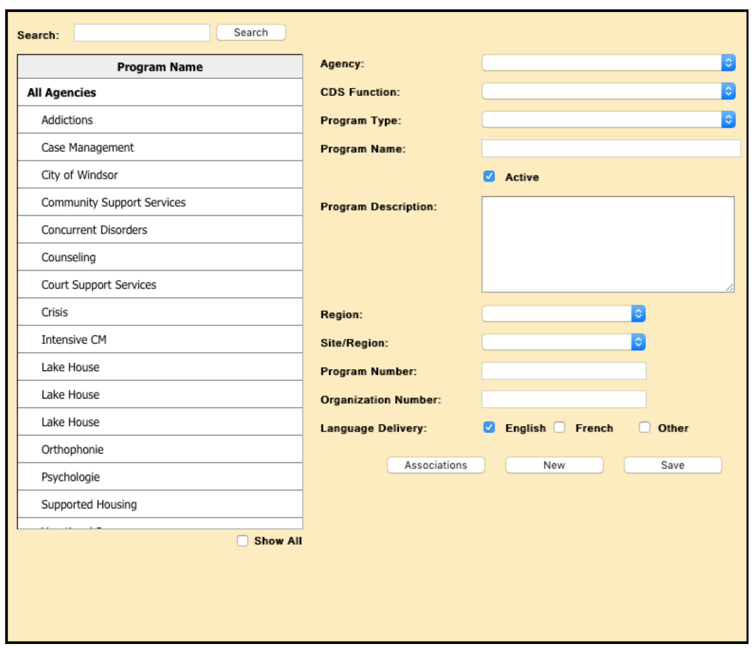


Figure 617 - Program Management Tab

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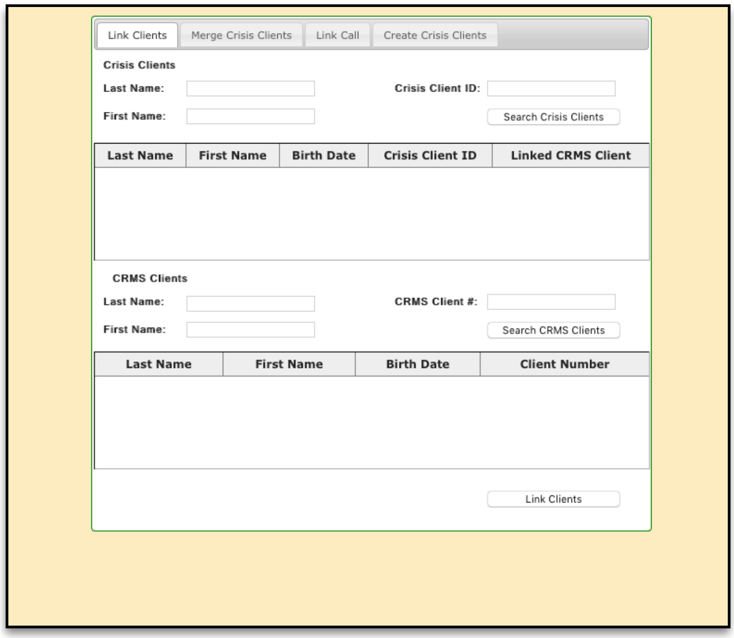
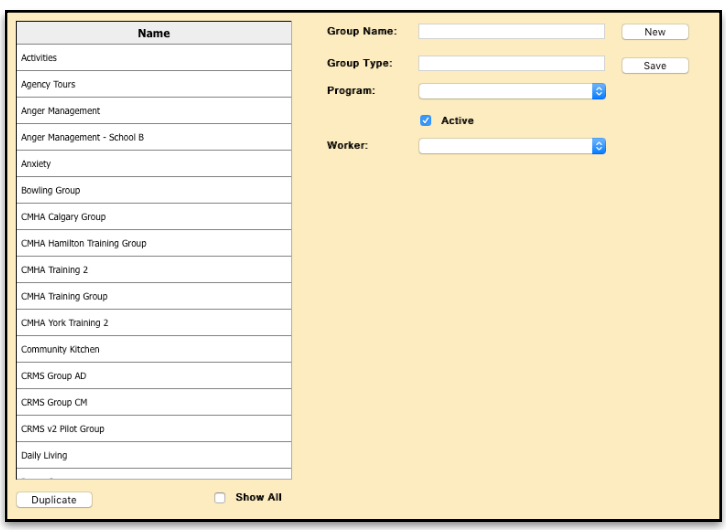
Crisis_plugin —> **Crisis Call Administration Tab =** Grants access to the Administration Module "Crisis Call Administration"



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.

Figure 618 - Crisis Call Administration Tab Access Right

Client_demographics_plugin —> **Client Group Management Tab** = Grants access to the Administration Module "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.

Figure 619 - Client Group Management Tab Access Right

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Client_demographics_plugin —> **Merge Clients** = Grants access to the “Merge Client Into” in the Entity Actions options on the CRMS Search Engine.

The **Merge Clients** access right allows CRMS Administrators or users whom have received proper training to merge two or more client files together. This gives the ability to the CRMS Administrator to clean up any duplicates or erroneously entered clients.

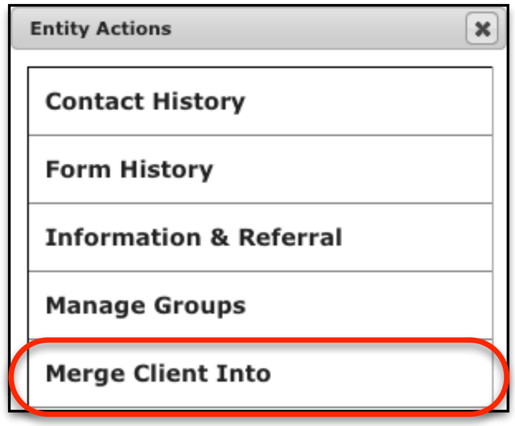

Figure 620 - Merge Clients Groups Access Right

Client_demographics_plugin —> **Groups** = Grants access to “Groups” Search Type from the CRMS Search Engine.

The **Groups** access right is necessary should the user need to perform work with groups. This can be contacts or case notes. Note that this permission does NOT allow them to manage the clients within the groups. This access right is necessary in order to see the “Client Groups” Search Type found on the CRMS Search Engine.

Figure 621 - Groups Access Right

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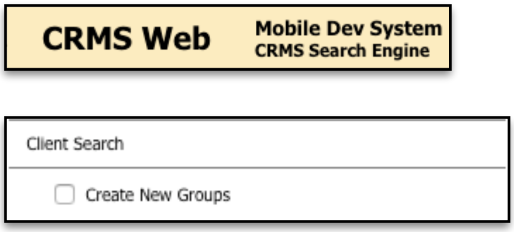


Client_demographics_plugin —> **Create New Groups** = Grants access to create new groups from the CRMS Search Engine when the Search Type is “Client Groups”.

The **Create New Groups** access right is necessary should the user need to create their own groups from the CRMS Search Engine —> Client Groups Module. Note that this access right does NOT allow them to manage the group. This is solely to see the “New Group” Entity Action when using the CRMS Search Engine. Note that these functions can also be performed under Administration —> Client Group Management.

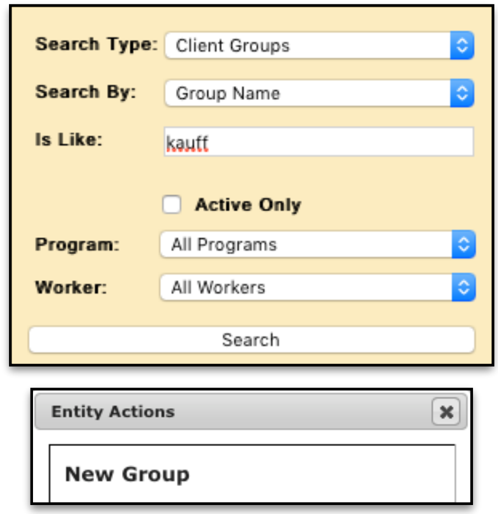
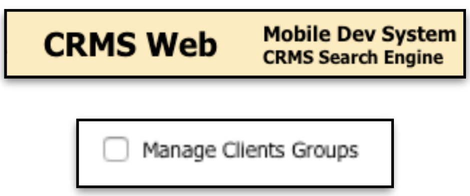


Figure 622 - Create New Groups Access Right



Client_demographics_plugin —> **Manage Client Groups** = Grants access to “Manage Clients in Group” Entity Actions option on the CRMS Search Engine.

The **Manage Client Groups** access right is necessary if the worker needs to remove or add clients to a particular group. Granting this access right will expose the “Manage Clients in Group” option from the CRMS Search Engine upon clicking on the desired group.

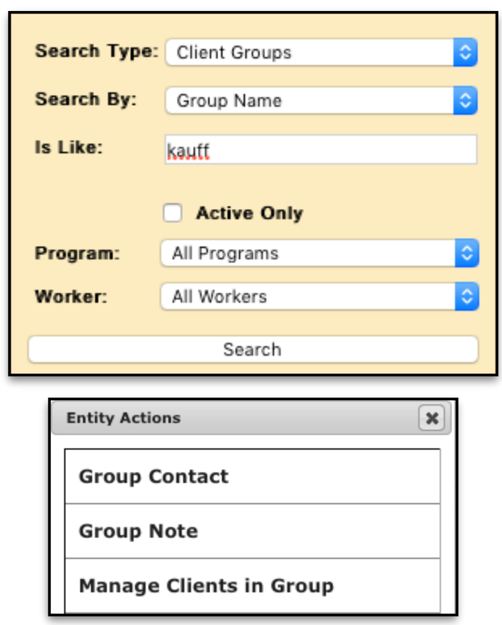


Figure 623 - Manage Client Groups Access Right

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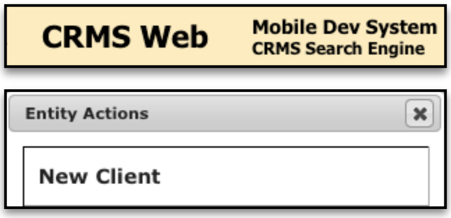


Client_demographics_plugin —> **New Client** = Grants access to the "New Client" in the Entity Actions options on the CRMS Search Engine.

The **New Client** access right allows users to create a new client file from the CRMS Search Engine. It exposes the "New Client" choice in the Entity Actions options. This access right is necessary should the user need to create new client files.

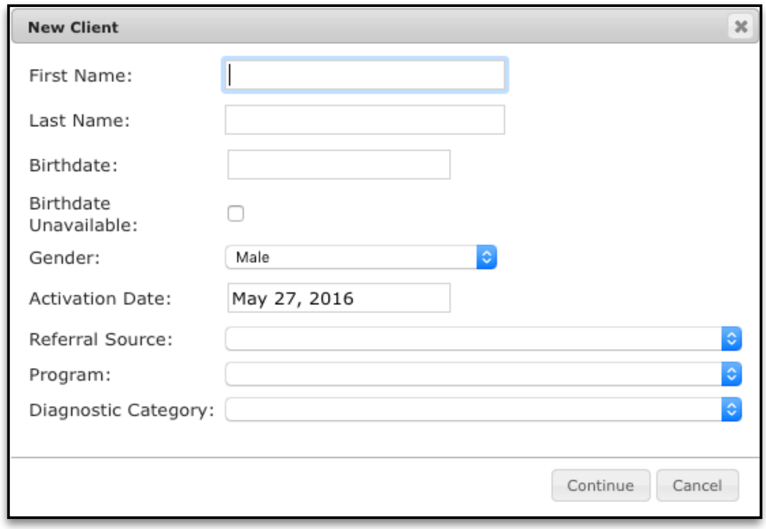
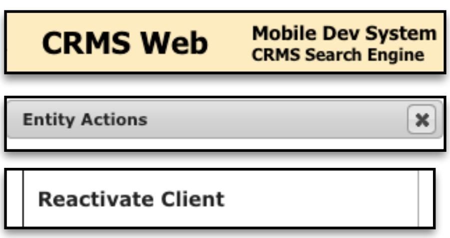
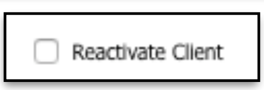


Figure 624 - New Client Access Right



Client_demographics_plugin —> **Reactivate Client** = Grants access to the "Reactivate Client" in the Entity Actions options on the CRMS Search Engine.



The **Reactivate Client** access right allows users to take an existing 'not active' file (.01, .02) and create the next referral for this client (.02, .03) by "reactivating" the client. This will automatically create a new client file linked to the previous referrals. This access right is necessary in order to re-admit a previously discharged client file.

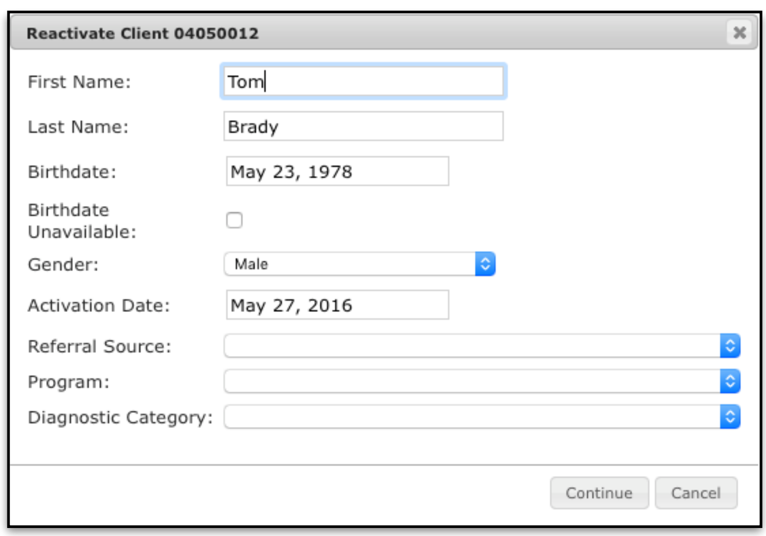


Figure 625 - Reactivate Access Right

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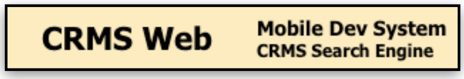
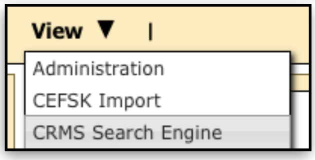
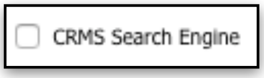


CSE_plugin —> **CRMS Search Engine** = Grants access to the CRMS Search Engine visible in the “View” Menu





The **CRMS Search Engine** module is the first point of entry into any client related module. Most workers at a bare minimum, will need to have this access right in order to locate a client, perform contacts/notes with a client, or even to input Information & Referral or Non Client Services. The CRMS Search Engine is normally the first module opened during any given work day.

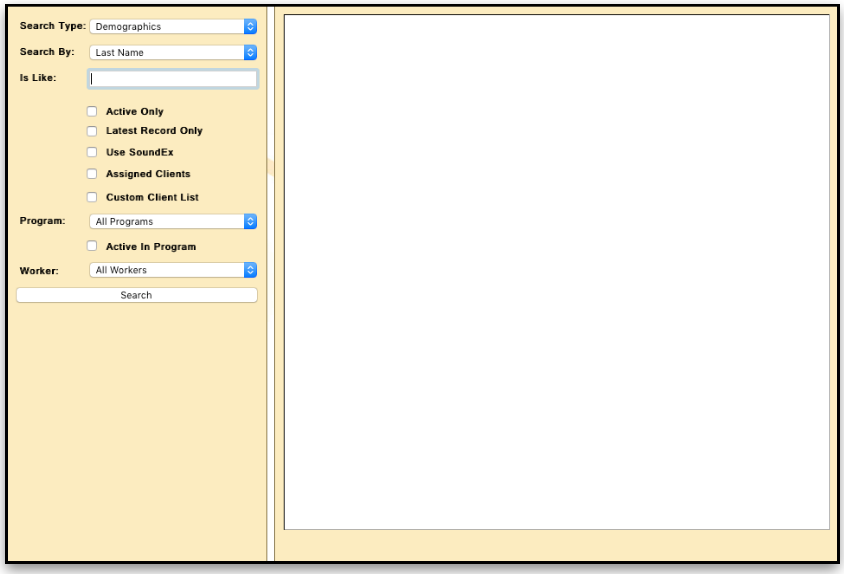


Figure 626 - CRMS Search Engine Access Right

Client_demographics_plugin —> **View Client** = Grants access to the “Entity Actions” menu choice “View Client”.

The **View Client** access right exposes the “View Client” menu choice to appear in the “Entity Actions” dialog. This dialog appears from the CRMS Search Engine after clicking on a desired client file. The **View Client** permission is necessary in order to access ANY client sub-module (Demographics, Medications, Agency History, etc,.) Most users will require this permission should they need to access a client file for any purpose.

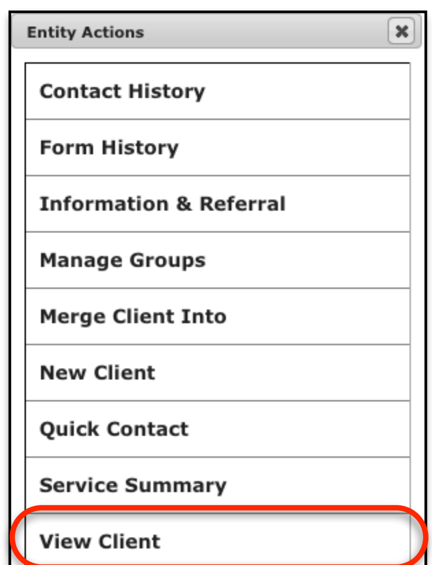


Figure 627 - View Client Access Right

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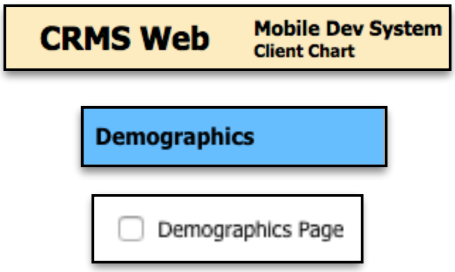


Client_demographics_plugin —> **Demographics Page** = Grants access to the Demographics page located within the Client Chart.

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.

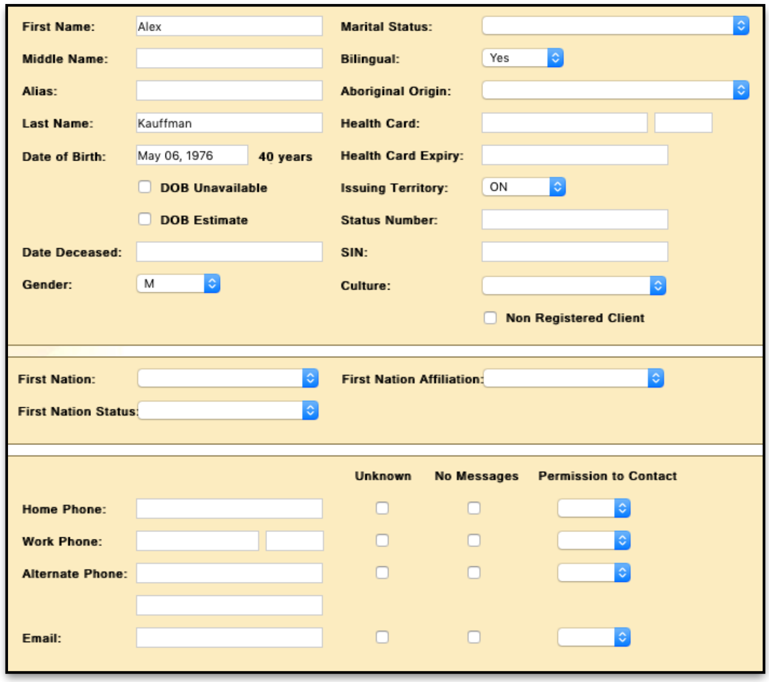
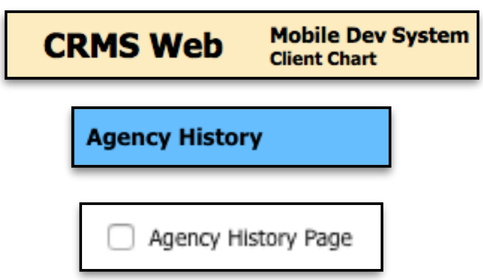


Figure 628 - Demographics Page Access Right



Client_demographics_plugin —> **Agency History Page** = Grants access to the "Agency History Page" located within the Client Chart.

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.

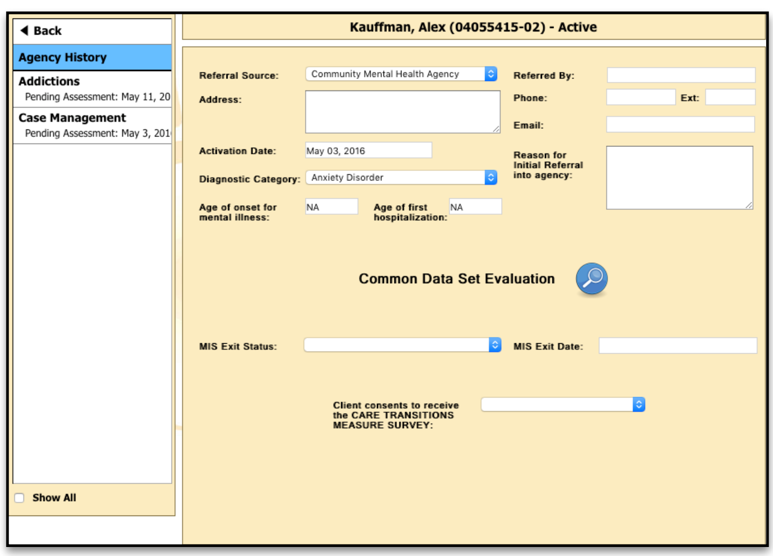


Figure 629 - Agency History Page Access Right

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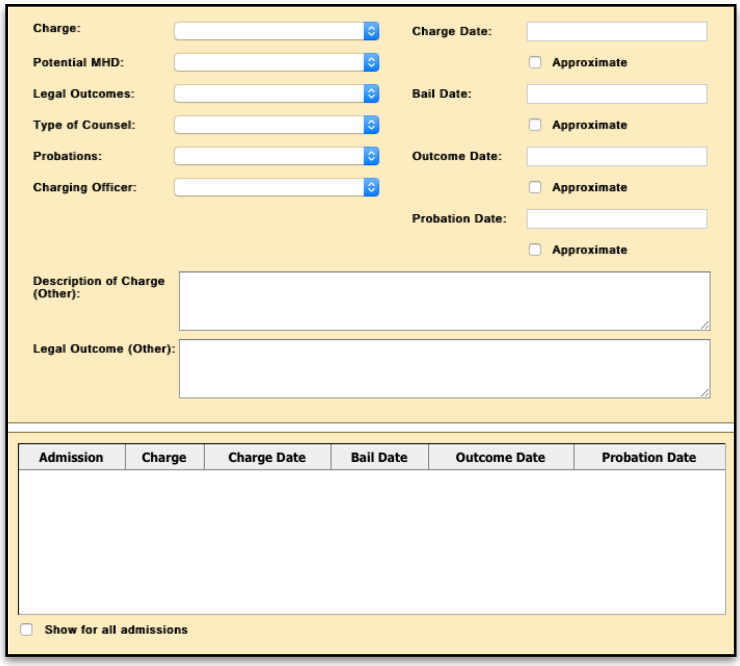
CRMS Web Mobile Dev System Client Chart

Charges

☐ Charges

Client_demographics_plugin —> **Charges** = Grants access to the "Charges Page" located within the Client Chart.



The **Charges** page allows users to document additional charge information above and beyond what is already captured in the CDS Baseline Data. This module is used more extensively by Court Support and Diversion programs.

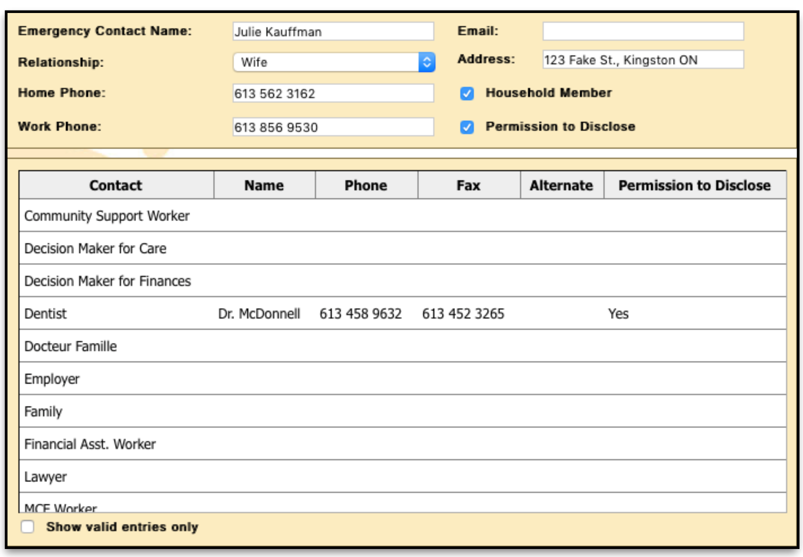
Figure 630 - Charges Access Right

CRMS Web Mobile Dev System Client Chart

Contact Info

☐ Contact Info Page

Client_demographics_plugin —> **Contact Info Page** = Grants access to the Contact Info page located within the Client Chart.



The **Contact Info Page** allows users to document any phone number or contact details for their pertinent contact information. Users can input the emergency contact information, as well as a dynamic list of contacts customized by the CRMS Administrators.

Figure 631 - Contact Info Page Access Right

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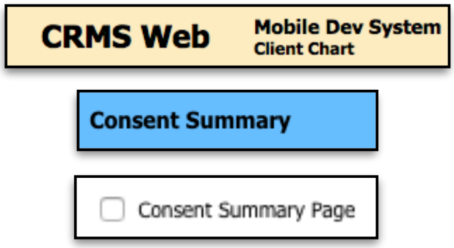
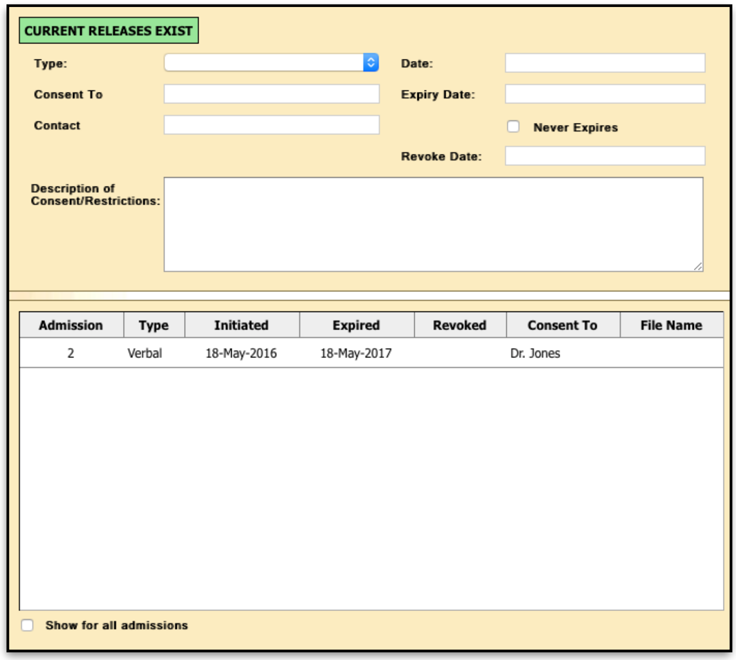
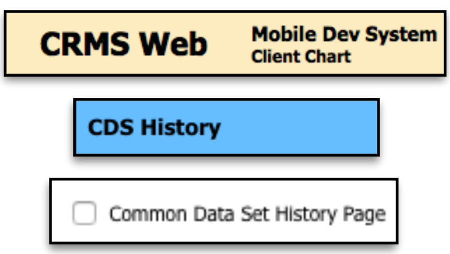


Client_demographics_plugin —> **Consent Summary Page** = Grants access to the Consent Summary page located within the Client Chart.

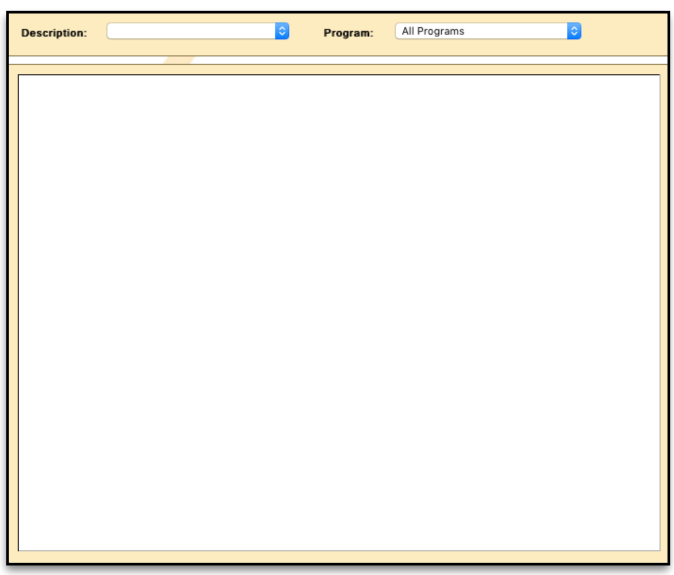


The **Consent Summary Page** allows users to input any written, verbal or other types of consents. Users can input the person for whom the consent is for, their contact information, expiration date (if applicable) and the description of the consent/restrictions. Users can also digitally attach any scanned and signed consent forms directly to the consent record.

Figure 632 - Consent Summary Page Access Right



Client_demographics_plugin —> **Common Data Set History Page** = Grants access to the CDS History page located within the Client Chart.



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.

Figure 633 - Common Data Set History Page Access Right

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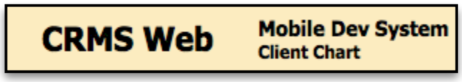

Client_demographics_plugin —> **Education** = Grants access to the Education Page located within the Client Chart.

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.

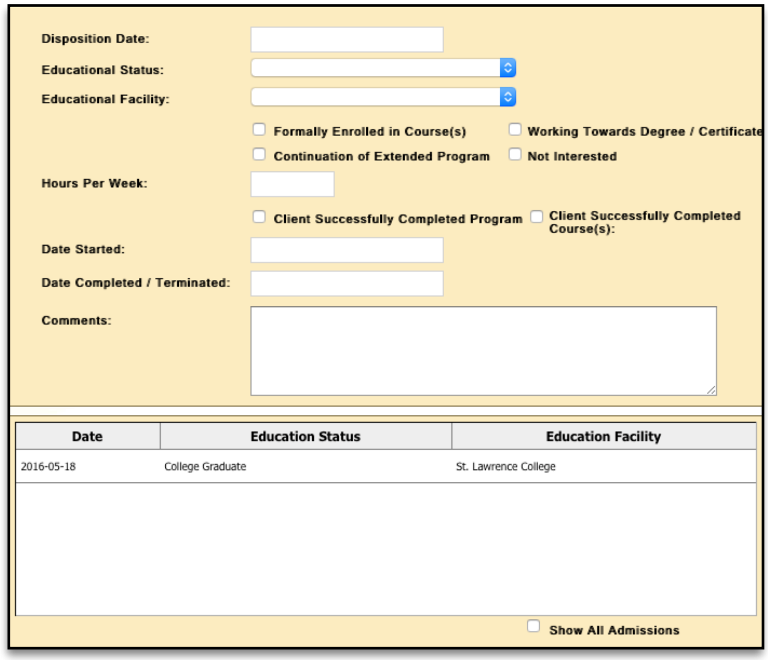

Figure 634 - Education Access Right

Client_demographics_plugin —> **ER Visits** = Grants access to the ER Visits Page located within the Client Chart.

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.

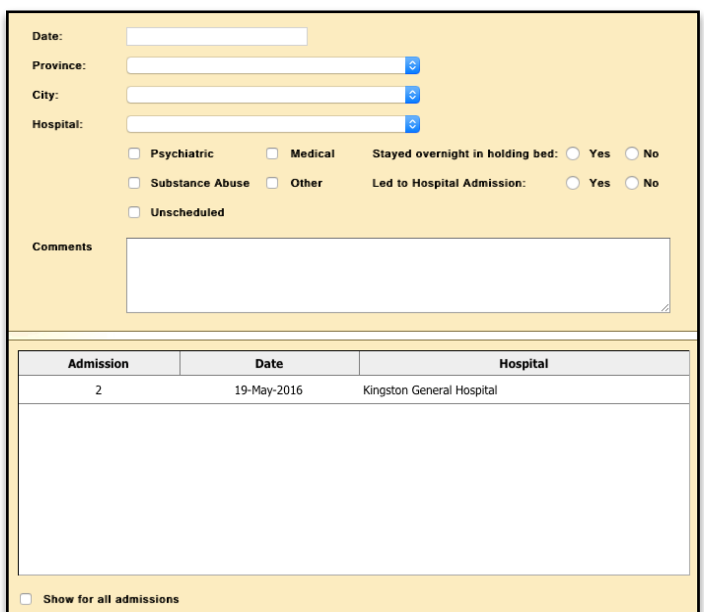

Figure 635 - ER Visits Access Right

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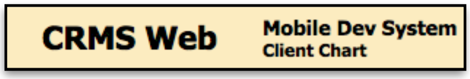

Client_demographics_plugin —> **Employment Page** = Grants access to the Employment Page located within the Client Chart.

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.

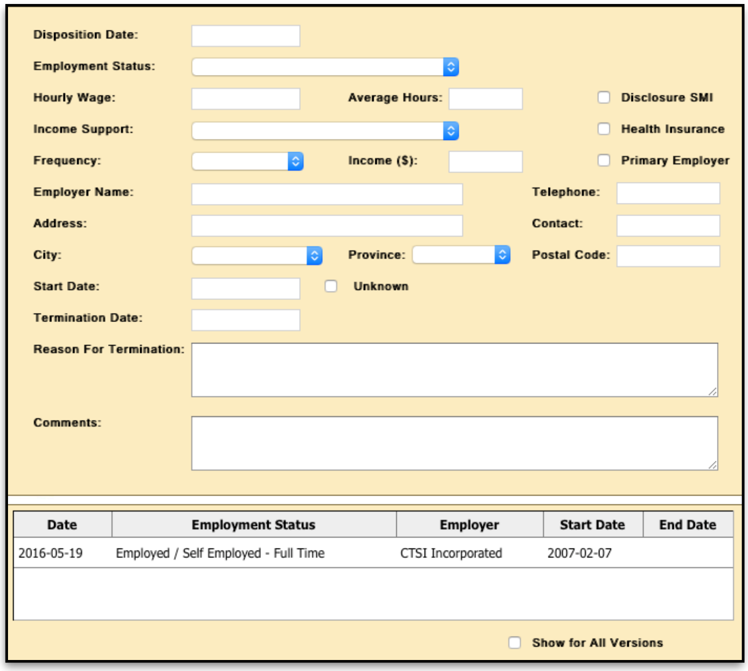

Figure 636 - Employment Access Right

Client_demographics_plugin —> **Goal Attainment Scale Page** = Grants access to the Goals page located within the Client Chart.

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.

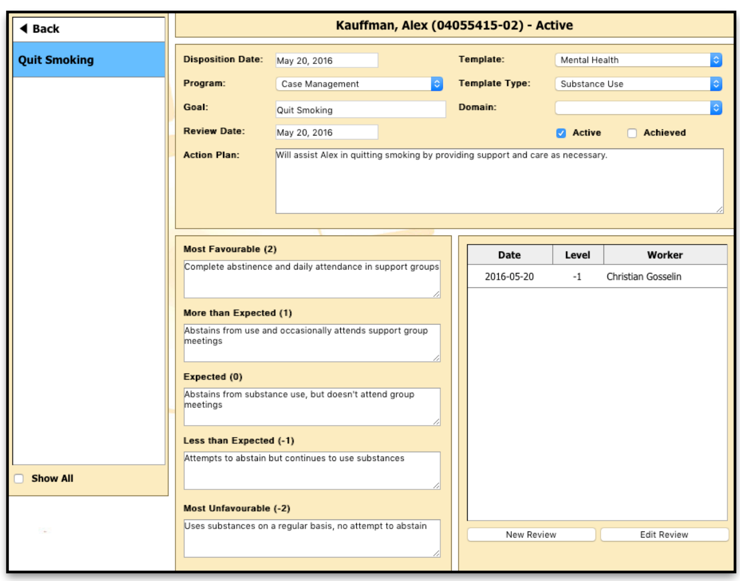

Figure 637 - Goal Attainment Scale Page Access Right

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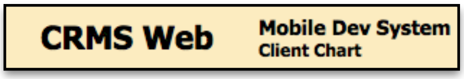


Client_demographics_plugin —> **Hospitalizations** = Grants access to the Hospitalizations page located within the Client Chart.

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”.

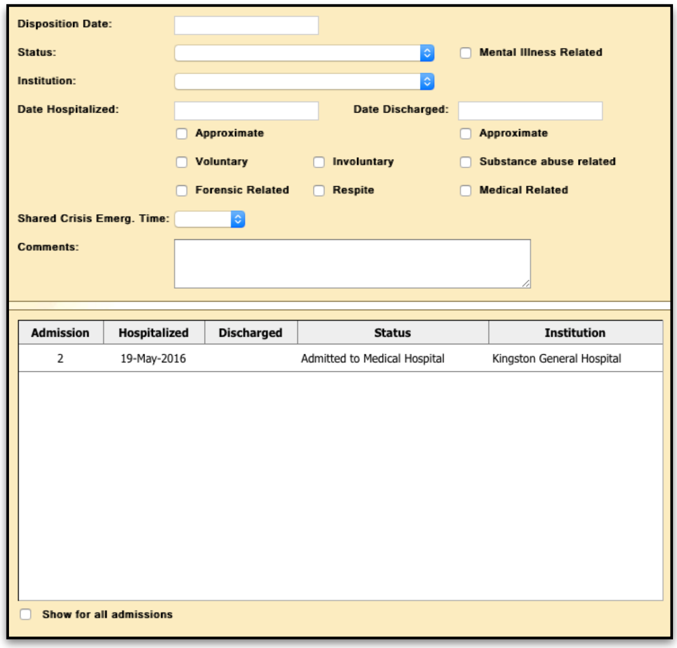
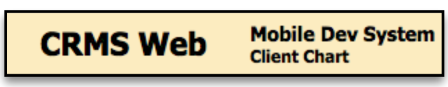


Figure 638 - Hospitalizations Access Right



Client_demographics_plugin —> **Incarcerations** = Grants access to the Incarcerations page located within the Client Chart.

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.

Figure 639 - Incarcerations Access Right

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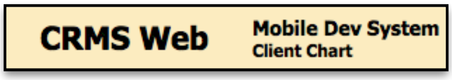
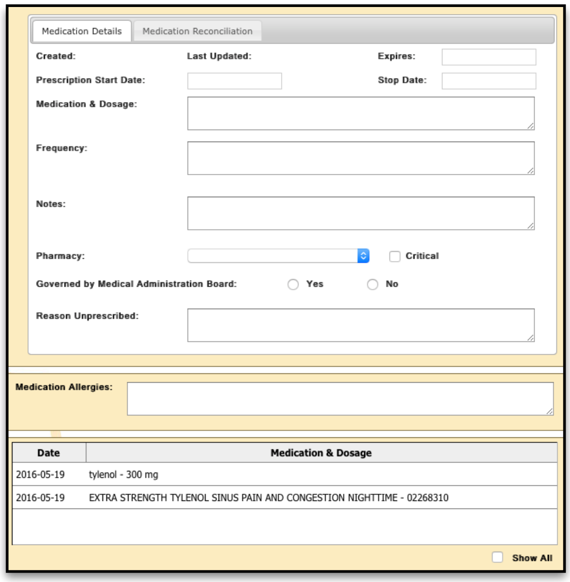


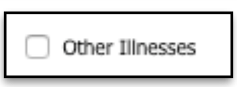
Client_demographics_plugin —> **Medications** = Grants access to the Medications page located within the Client Chart.



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.

Figure 640 - Medications Access Right

Client_demographics_plugin —> **Other Illnesses** = Grants access to the Other Illness page within the Client Chart.



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.

Figure 641 - Other Illnesses Access Right

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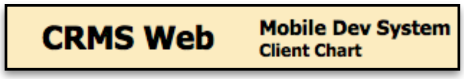
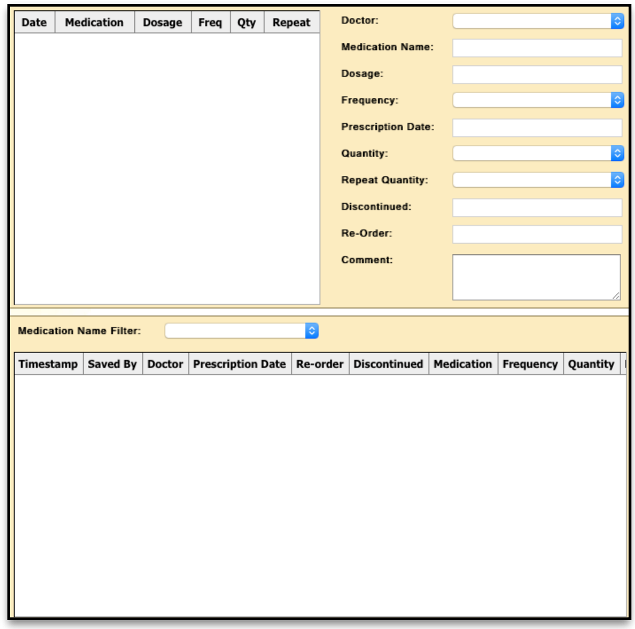


Client_demographics_plugin —> **Prescriptions** = Grants access to the Prescriptions page within the Client Chart.



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.

Figure 642 - Prescriptions Access Right

Client_demographics_plugin —> **Risk Factors Page** = Grants access to the Risk Factors page within the Client Chart.

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.

Figure 643 - Risk Factors Access Right

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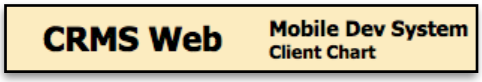


The **Save** access right allows users to save changes made to a clients' chart. This access right is crucial should the user have to perform demographics update, open a new program for the client, etc. Should the user not have this permission, they will be unable to save on any of the modules located within the Client Chart.

Client_demographics_plugin —> **Save** = Grants the user the ability to save changes within the Client Chart.

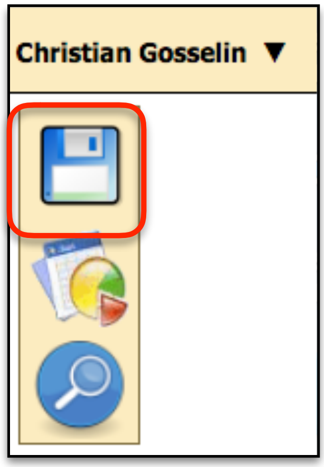
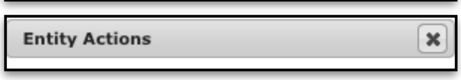
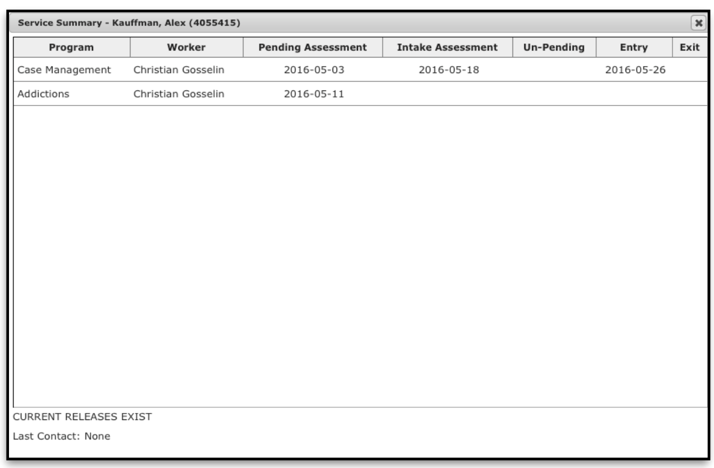


Figure 644 - Save Access Right



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

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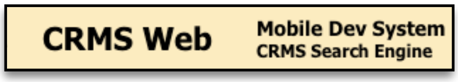


Client_demographics_plugin —> **Deactivate Client** = Grants access to the “Discharge Client” prompt on the Agency History module.

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.

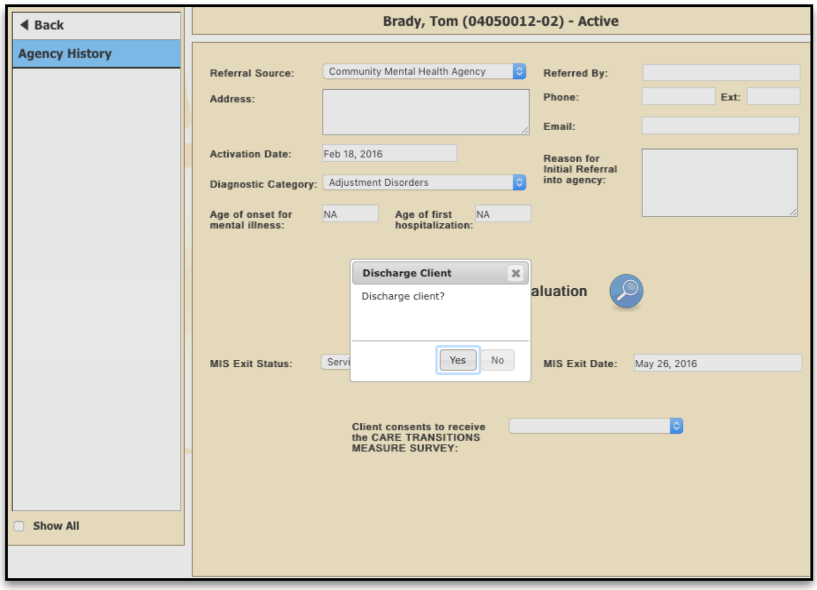
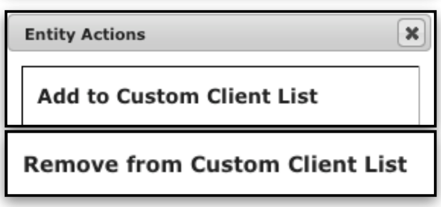
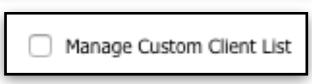


Figure 646 - Deactivate Client Access Right





Client_demographics_plugin —> **Manage Custom Client List =** Grants access to the “Add/Remote” from Custom Client List on the CRMS Search Engine.

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.

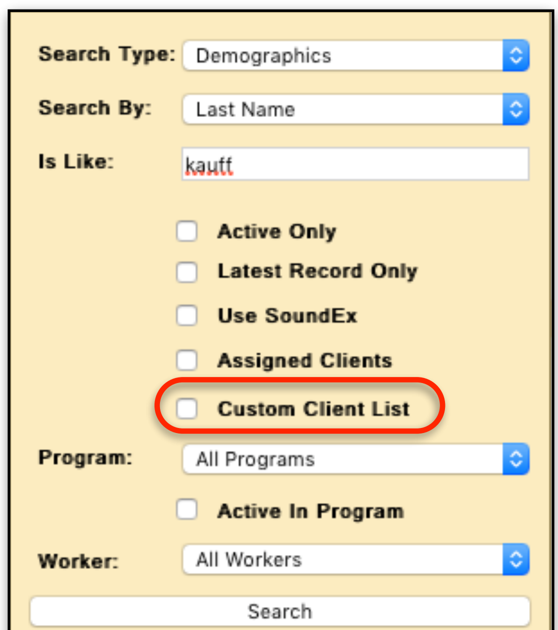


Figure 647 - Manage Custom Client List Access Right

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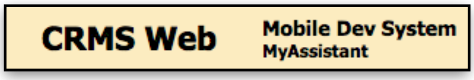
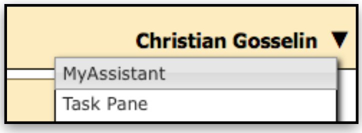


Client_demographics_plugin —> **MyAssistant** = Grants access to the “MyAssistant” module located inside the “User” drop down.



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.

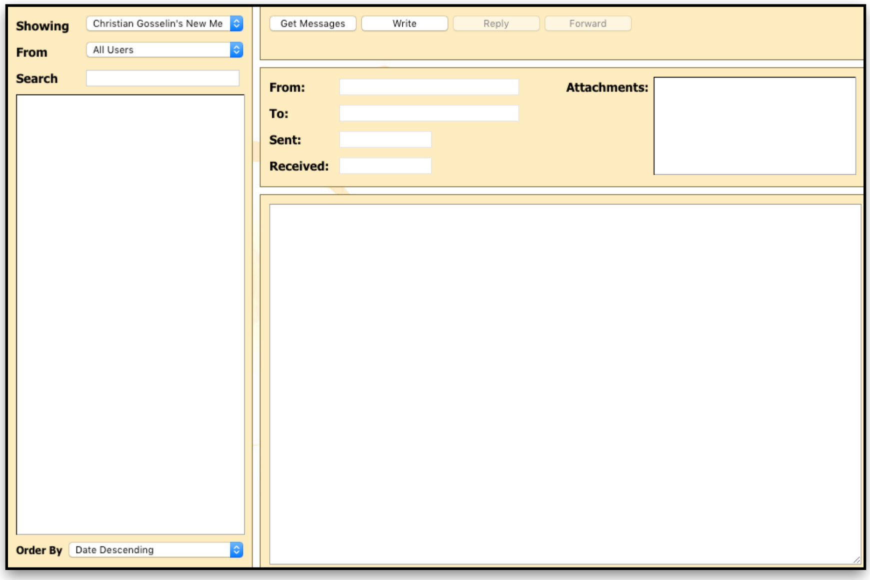


Figure 648 - MyAssistant Access Right

Crisis_plugin —> **Crisis Call Module** = Grants access to the “Crisis Calls” Search Type from the CRMS Search Engine.

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”.

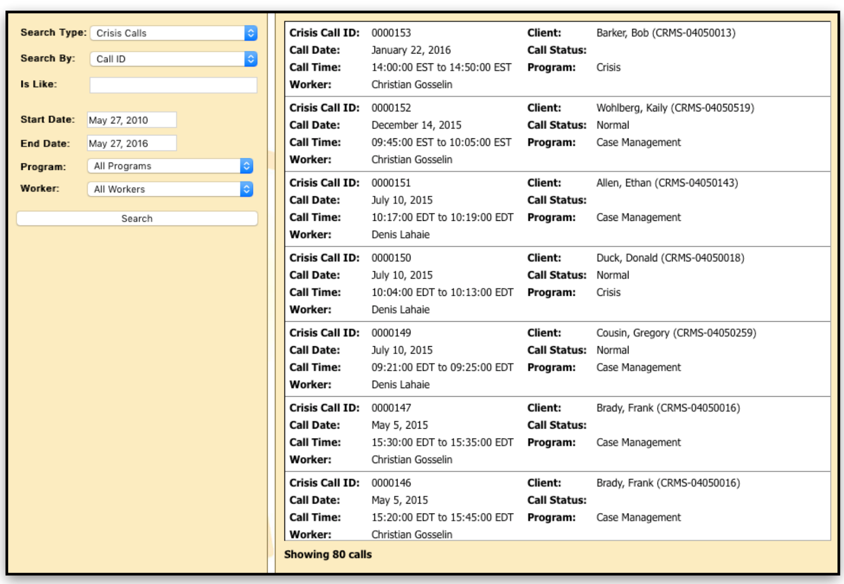


Figure 649 - Crisis Call Module Access Right

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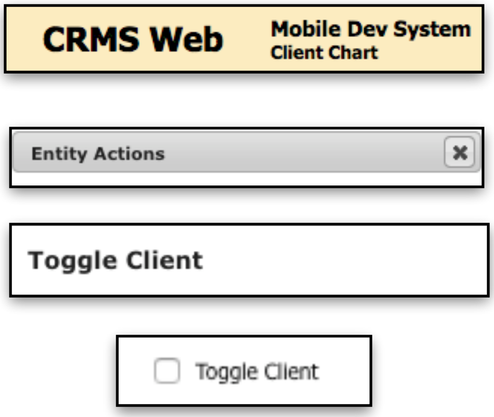
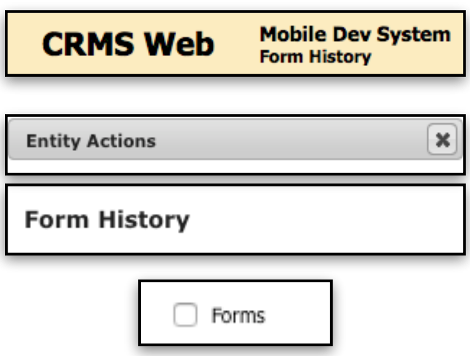


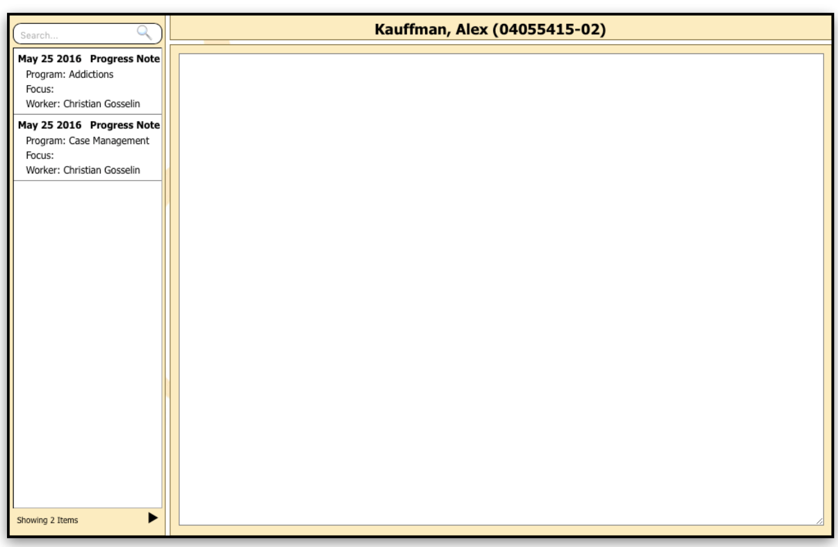
Client_demographics_plugin—> **Toggle Client =** Grants access to make modifications to a ‘Not Active’ Client Chart.

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



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.

Figure 651 - Forms Access Right

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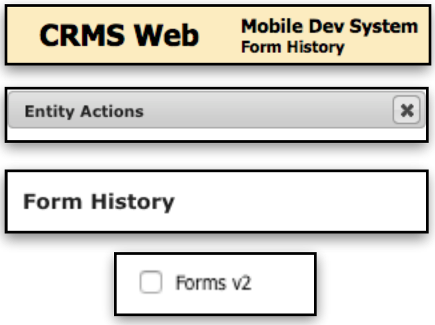
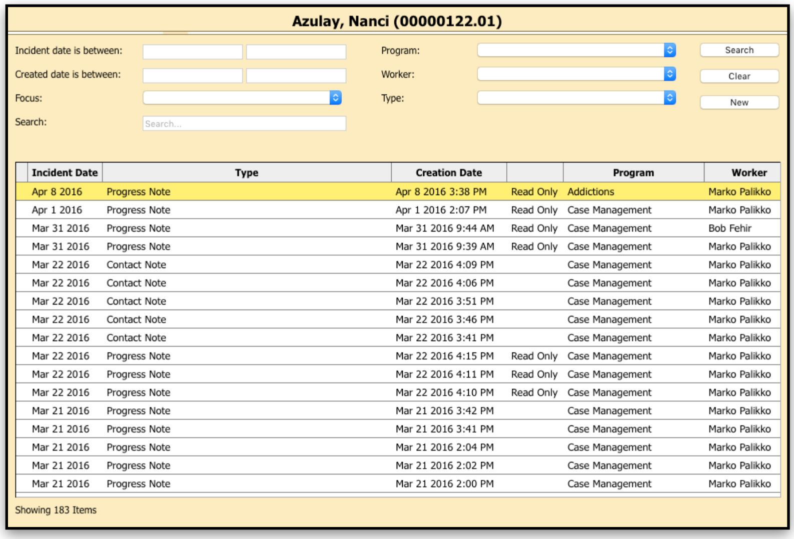


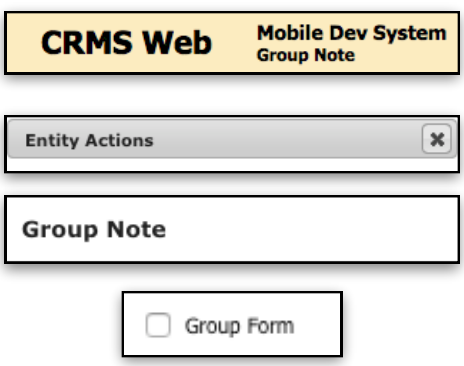
Chart_plugin —> **Forms v2 =** Grants access to redesigned Forms History module.

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.



Incident Date	Type	Creation Date		Program	Worker
Apr 8 2016	Progress Note	Apr 8 2016 3:38 PM	Read Only	Addictions	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

Figure 652 - Forms v2 Access Right



Chart_plugin —> **Group Form** = Grants access to the “Group Note” Entity Actions options when utilizing the “Groups” module located within the CRMS Search Engine.

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.

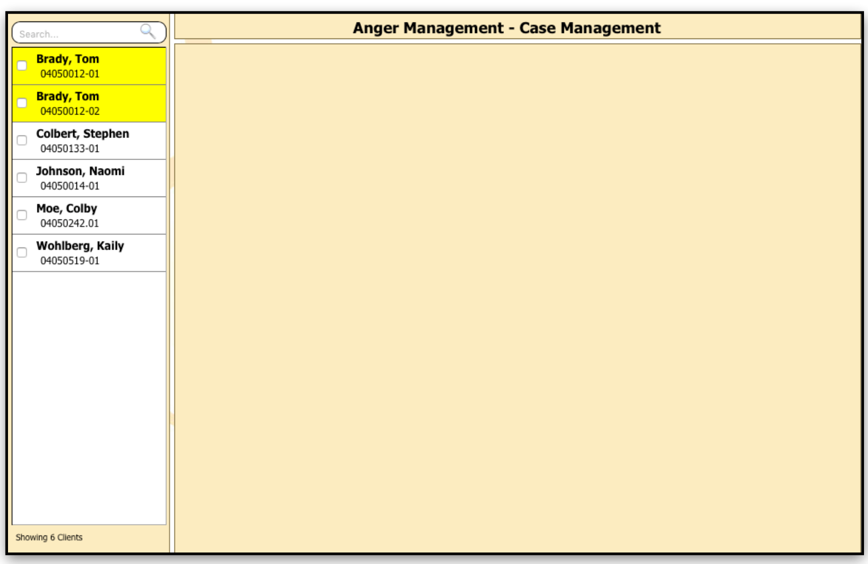


Figure 653 - Group Form Access Right

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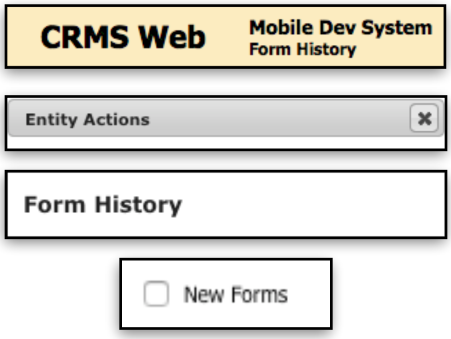
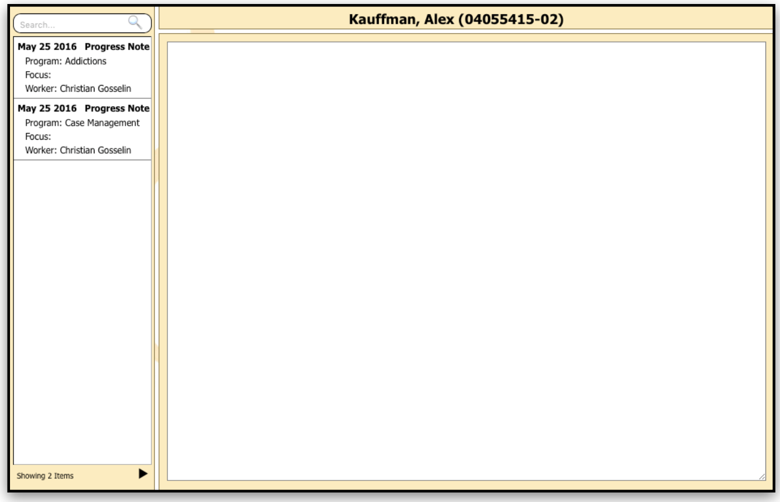
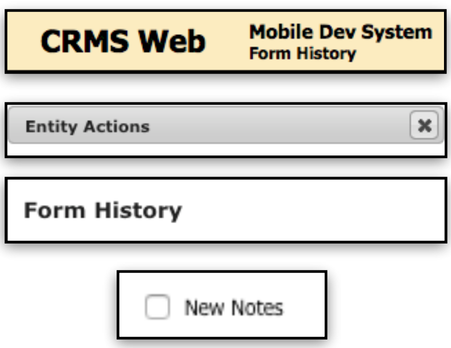


Chart_plugin —> **New Forms =** Grants access to create new “forms” within the “Forms History” module.

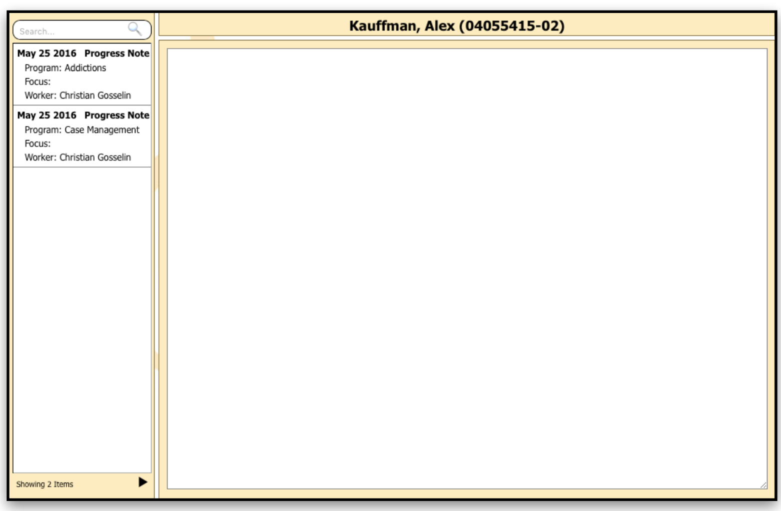


The **New Forms** access right allows users to create new ‘forms’ within the Forms History module of a clients’ chart. NOTE - This permission is not to be confused with “New Notes” which are a different style of documents.

Figure 654 - New Forms Access Right



Chart_plugin —> **New Notes =** Grants access to create new “notes” within the “Forms History” module.



The **New Notes** access right allows users to create new ‘notes’ within the Forms History module of a clients’ chart. NOTE - This permission is not to be confused with “New Forms” which are a different style of documents.

Figure 655 - New Notes Access Right

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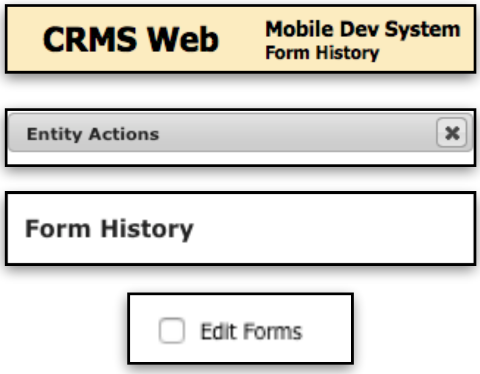


Chart_plugin —> **Edit Forms =** Grants access to modify / edit "forms" within the "Forms History" module.

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.

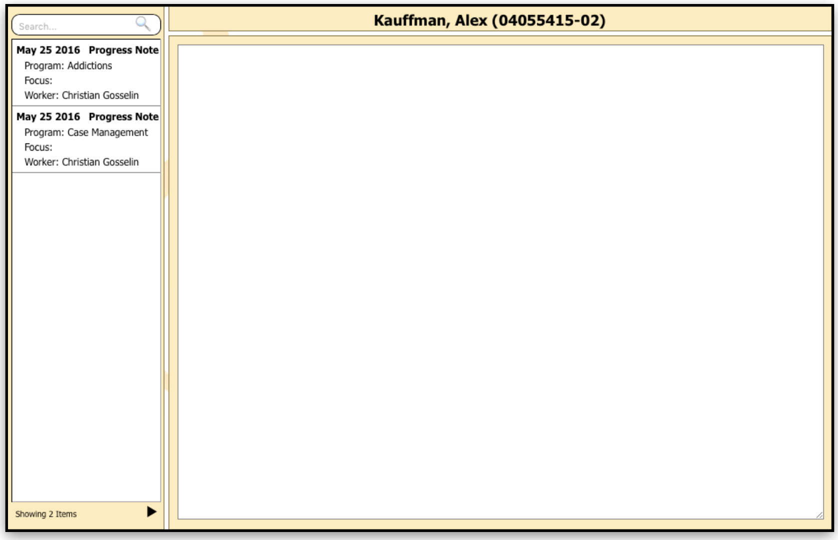
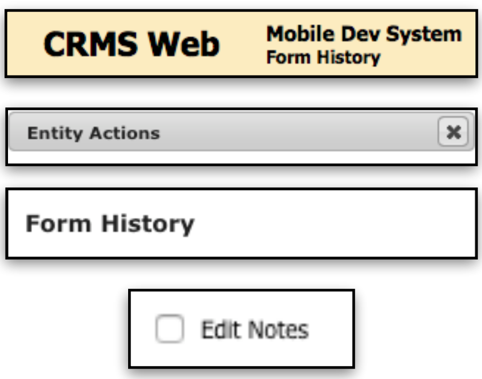


Figure 656 - Edit Forms Access Right



Chart_plugin —> **Edit Notes =** Grants access to modify / edit "notes" within the "Forms History" module.

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.

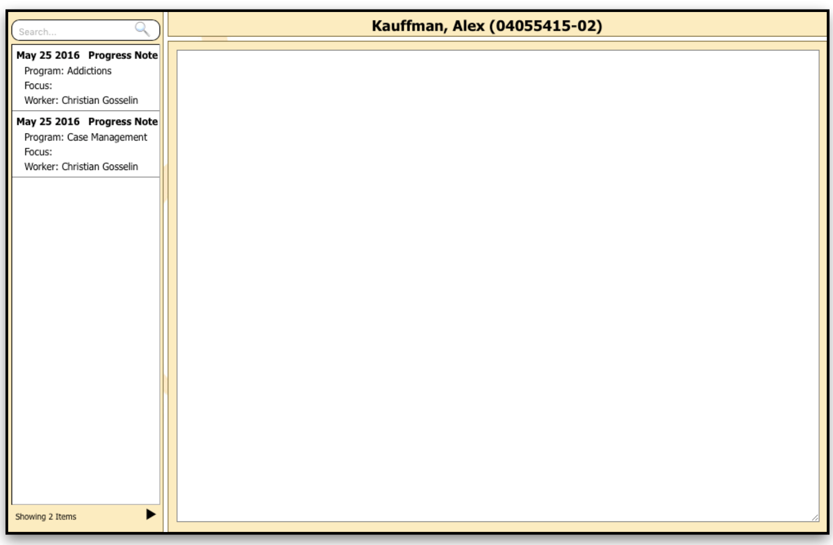


Figure 657 - Edit Notes Access Right

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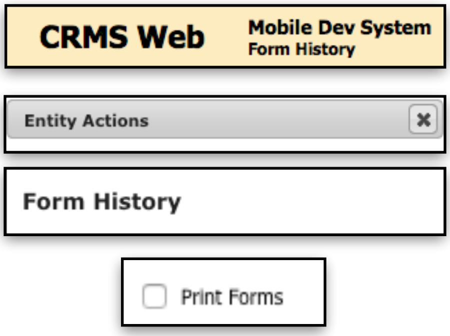
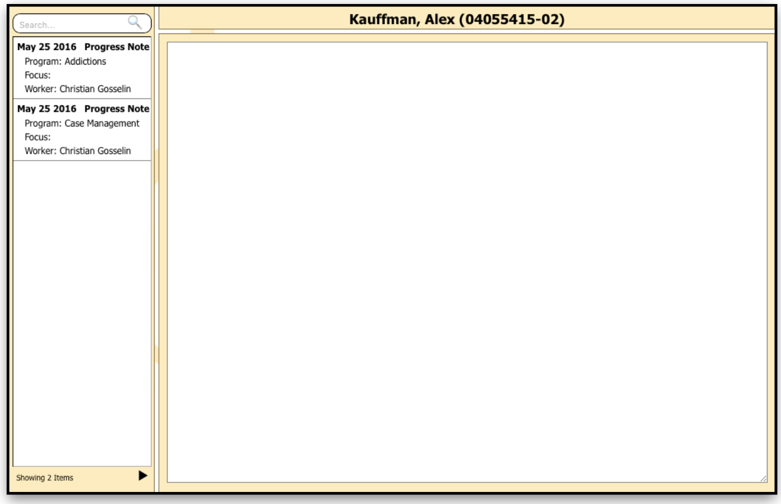
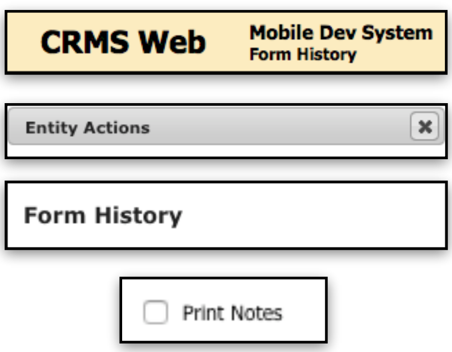


Chart_plugin —> **Print Forms =** Grants access to print "forms" within the "Forms History" module.

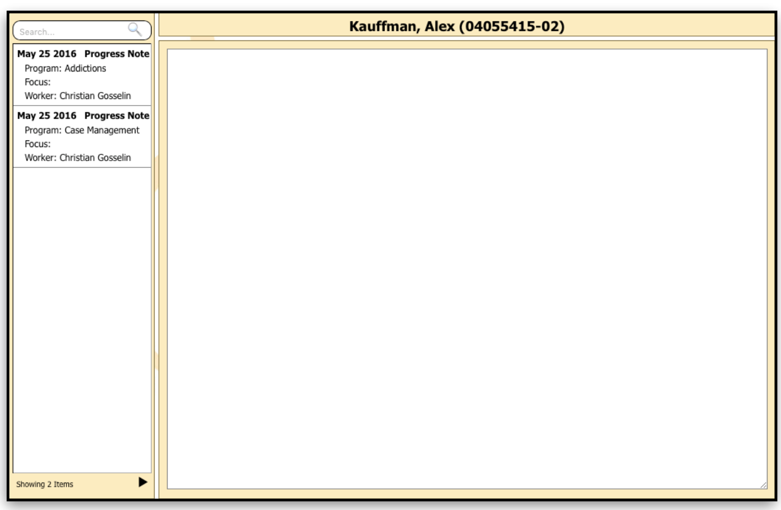


The **Print Forms** access right allows users to print 'forms' within the Forms History module of a clients' chart. NOTE - This permission is not to be confused with "Print Notes" which are a different style of documents.

Figure 658 - Print Forms Access Right



Chart_plugin —> **Print Notes =** Grants access to print "notes" within the "Forms History" module.



The **Print Notes** access right allows users to print 'notes' within the Forms History module of a clients' chart. NOTE - This permission is not to be confused with "Print Forms" which are a different style of documents.

Figure 659 - Print Notes Access Right

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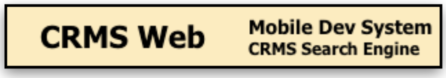

Contact_plugin —> **Contacts** = Grants access to the “Contact History by Worker” Search Type on the CRMS Search Engine.

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.

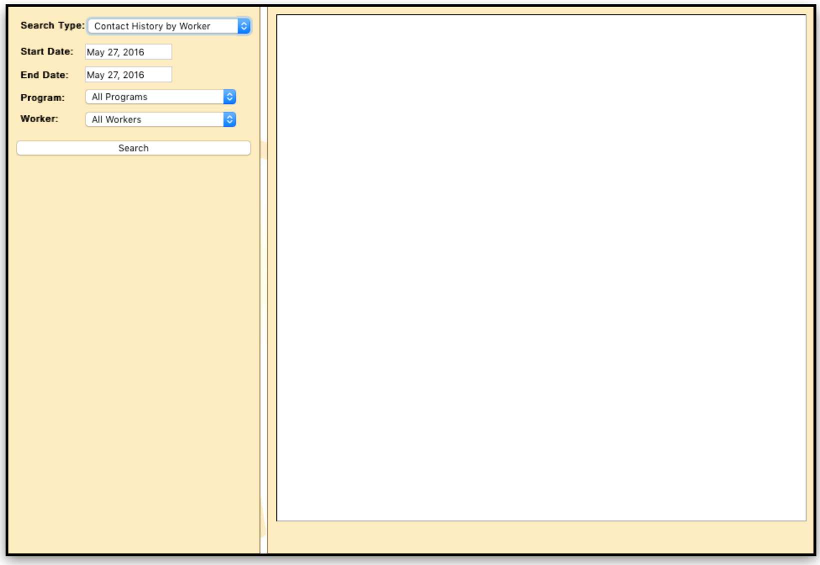

Figure 660 - Contacts Access Right

Contact_plugin —> **Group Contact** = Grants access to the “Group Contact” Entity Action option off the CRMS Search Engine when utilizing the “Groups” module.

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.

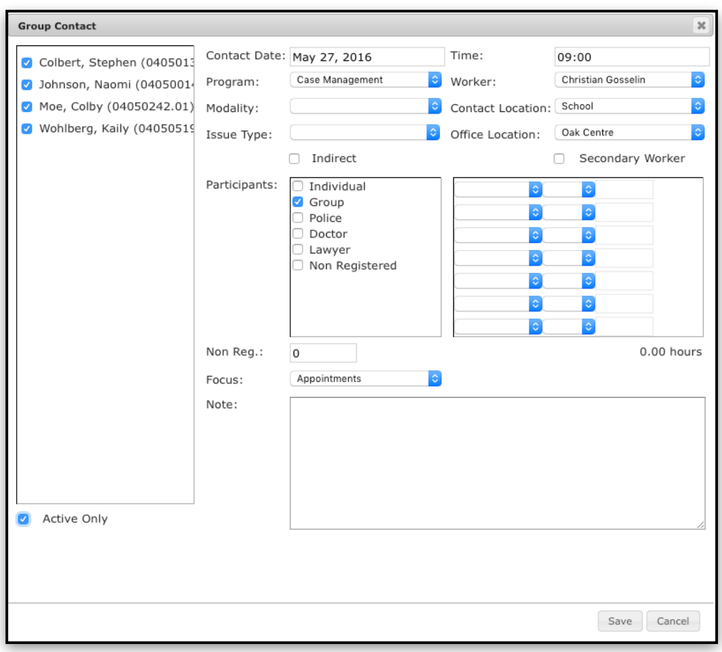

Figure 661 - Group Contact Access Right

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Contact_plugin —> **Quick Contact** = Grants access to the “Quick Contact” Entity Action option off the CRMS Search Engine.

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.

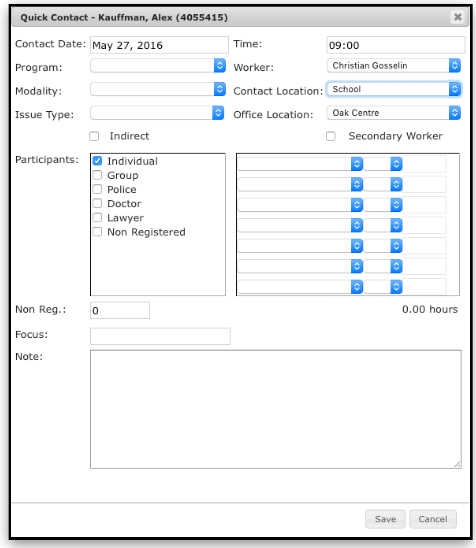
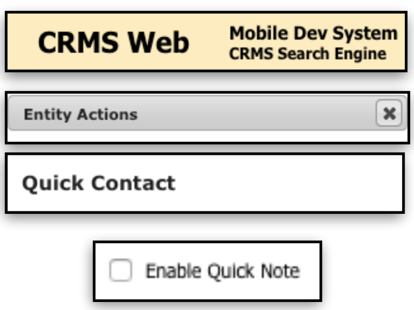


Figure 662 - Quick Contact Access Right



Contact_plugin —> **Enable Quick Note** = Grants access to the “Note” field on the Quick Contact Dialog located off the CRMS Search Engine.

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.

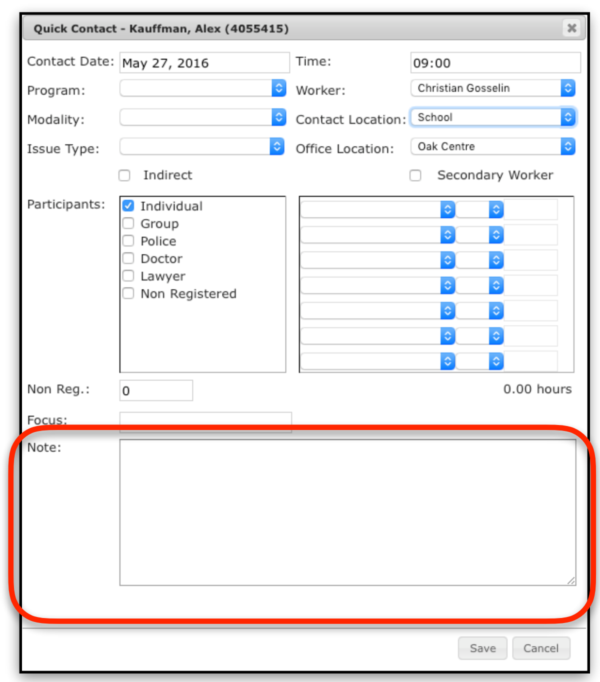


Figure 663 - Enable Quick Note Access Right

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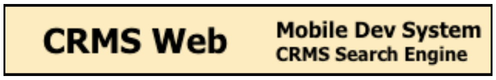


Contact_plugin —> **Information & Referral** = Grants access to the Search Type “Information & Referral”.

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.

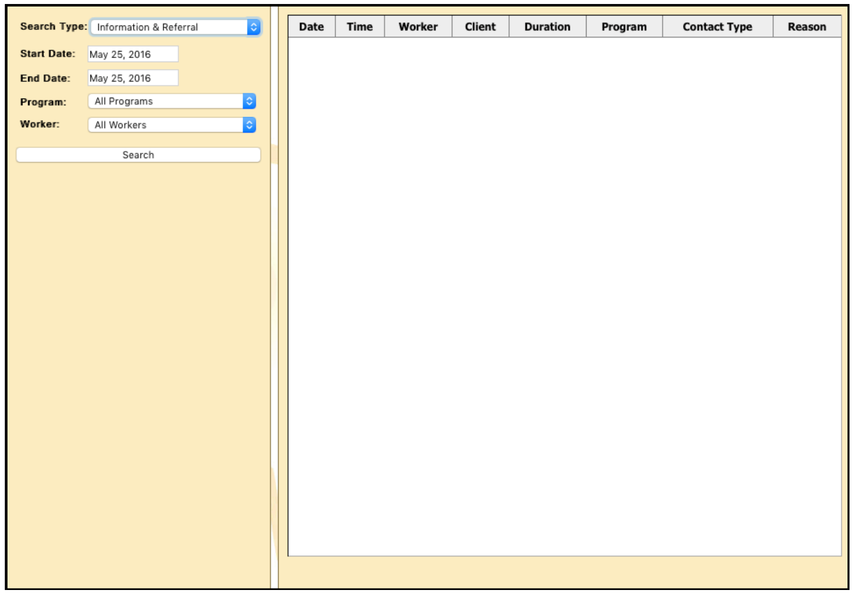
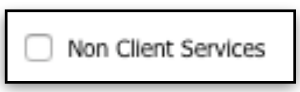


Figure 664 - Information & Referral Access Right

Contact_plugin —> **Non Client Services** = Grants access to the Search Type “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.

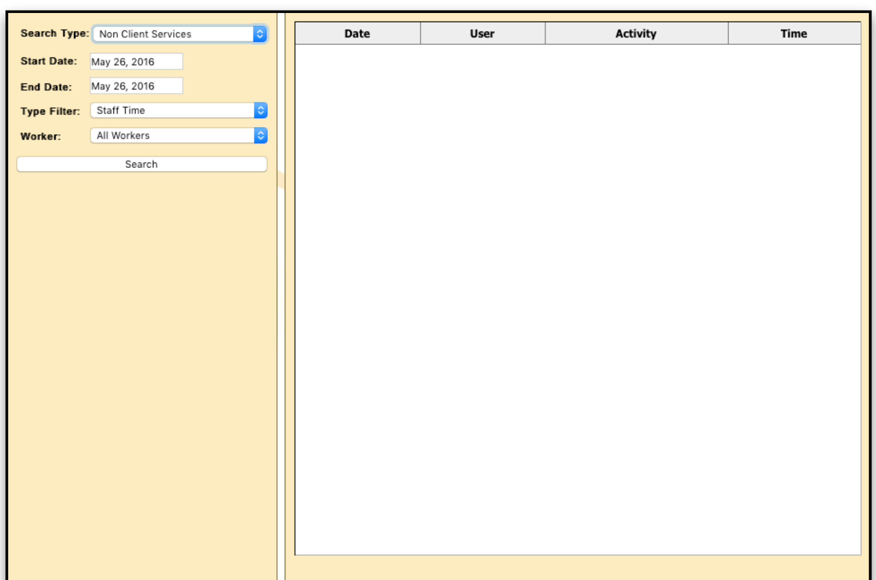


Figure 665 - Non Client Services Access Right

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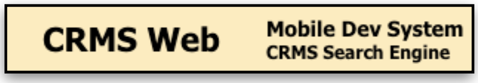

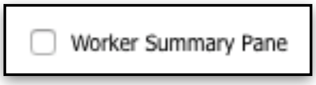

Contact_plugin —> **Worker Summary Pane** = Grants access to the "Worker Summary" drop down choice located within the "Task Pane" on the CRMS Search Engine.

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.

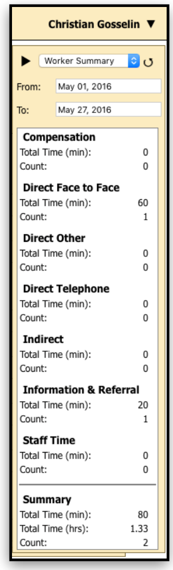

Figure 666 - Worker Summary Pane Access Right

Workflow_plugin —> **Workflow Viewer** = Grants access to the "Workflow" Task Pane located under the "user name".

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.

Figure 667 - Workflow Viewer Access Right

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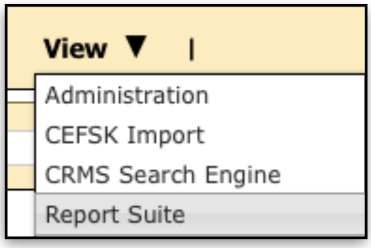
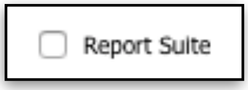
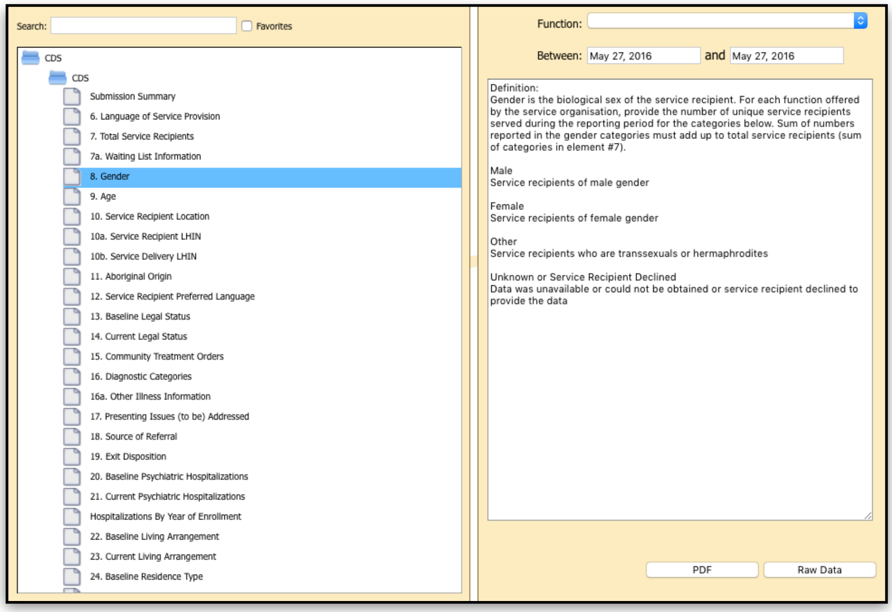
ReportSuite_plugin —> **Report Suite** = Grants access to the "Report Suite" menu choice in the "View" Menu of CRMS.



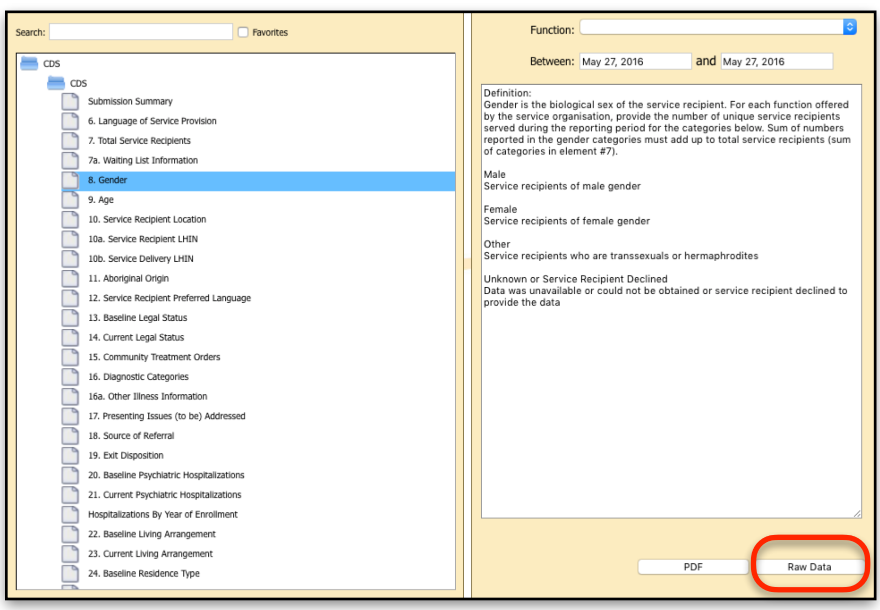




The **Report Suite** access right allows users to run reports for which they have also been granted access to. Granting this access right to the user allows them to access the Report Suite. It DOES NOT mean they can run a report. Report by report access rights must be granted to a 'User Group' in order for the user to view any reports.

Figure 668 - Report Suite Access Right

ReportSuite_plugin —> **Raw Data** = Grants access to the "Raw Data" button on the Report Suite Module.



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.

Figure 669 - Raw Data Access Right

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CRMS Web **Mobile Dev System** **Client Chart**

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.

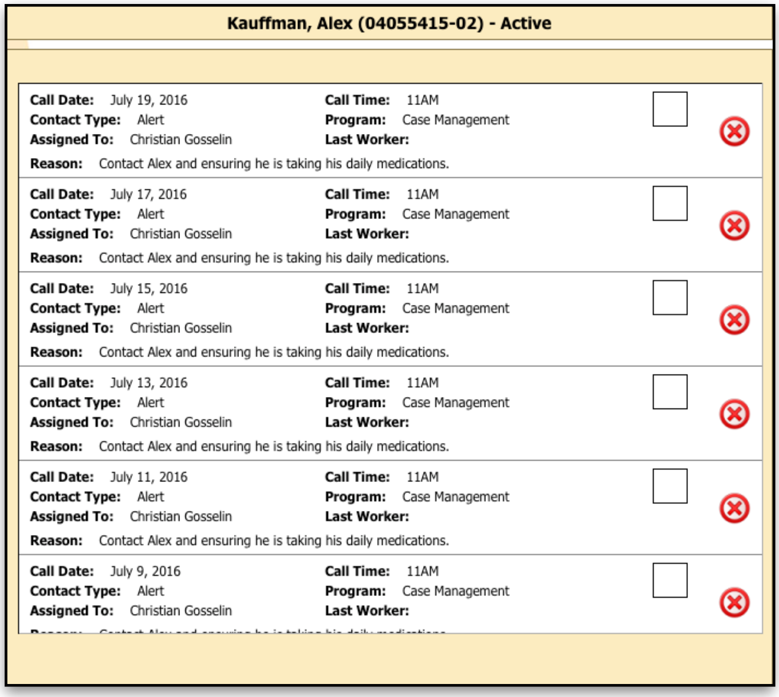

Figure 670 - Follow Up Scheduler Access Right

CRMS Web **Mobile Dev System** **CRMS Search Engine**

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.

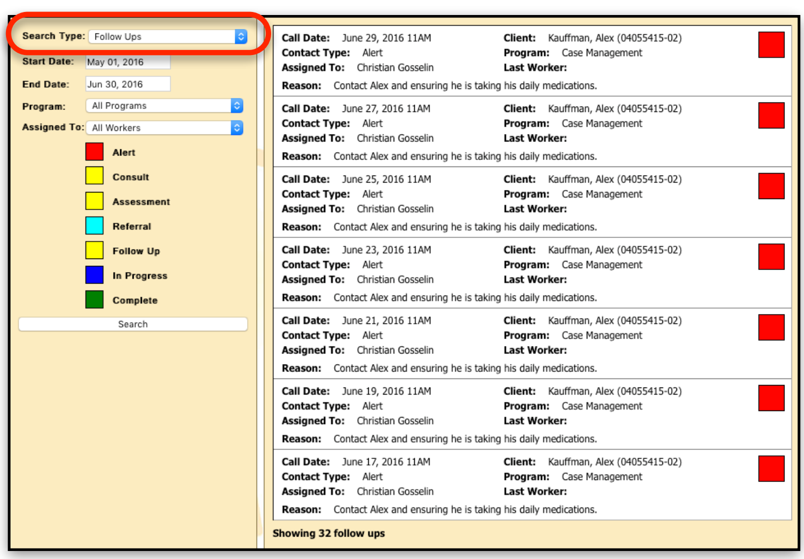

Figure 671 - Follow Up Viewer Access Right

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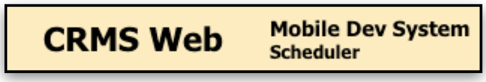
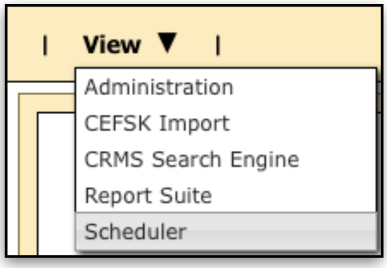
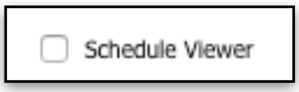


Tc_plugin —> **Scheduler Viewer** = Grants access to the “Scheduler” located within the “View” menu of CRMS.





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.

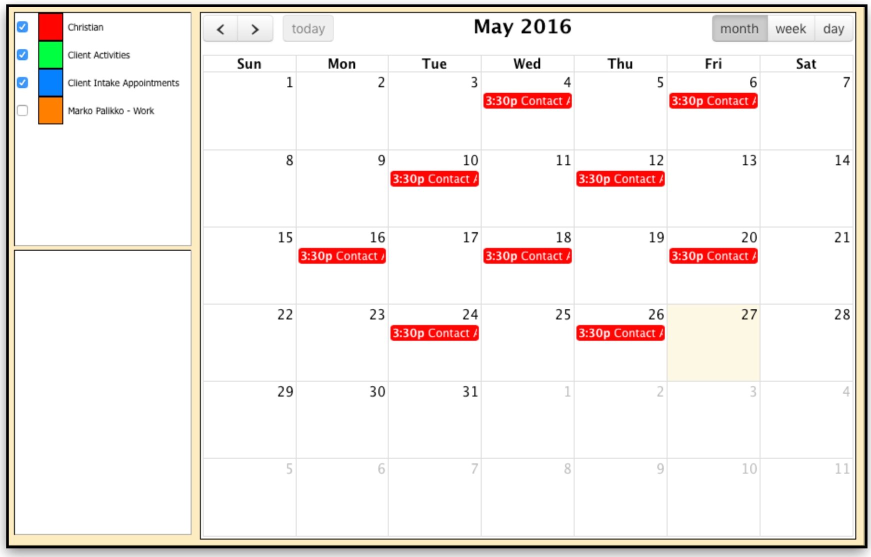


Figure 672 - Scheduler Viewer Access Right

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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.

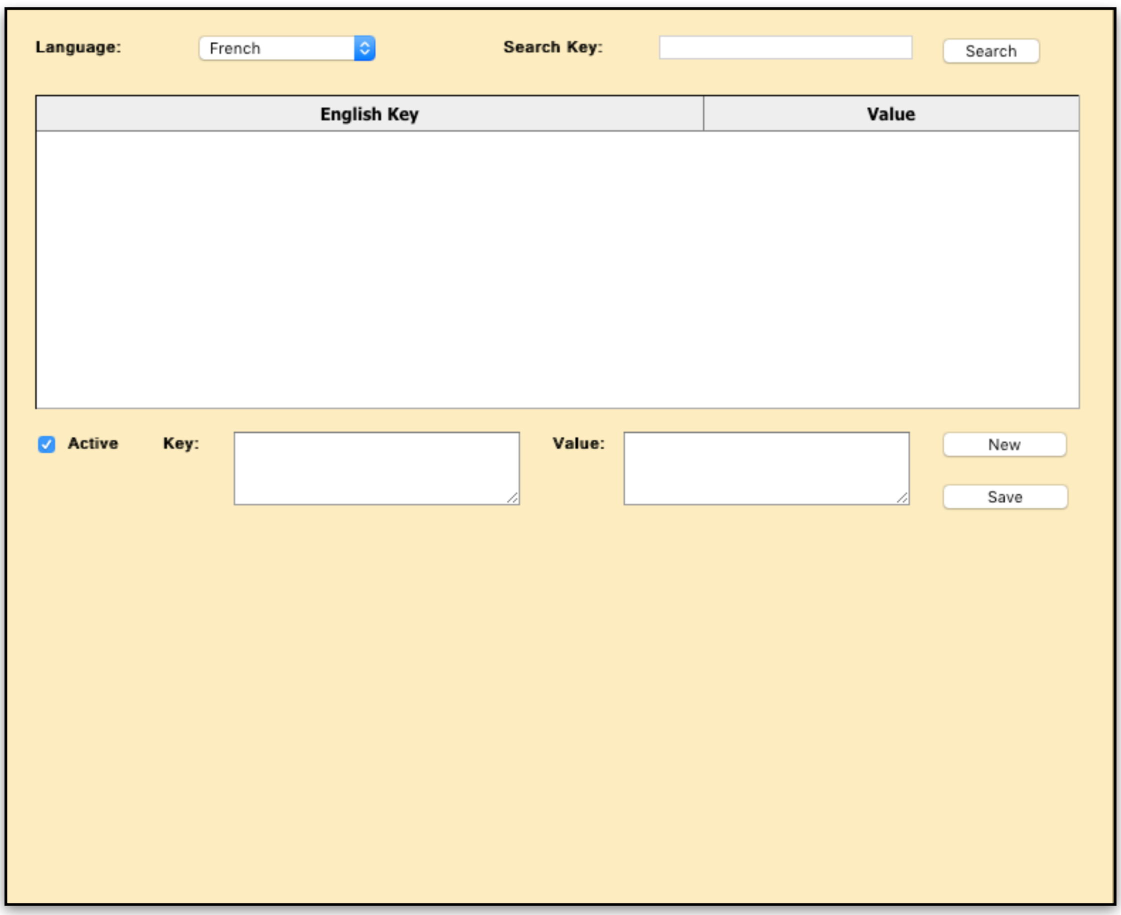

Figure 674 - Translations Module

4. CRMS Administrators should execute a search to see if an existing translation exists, or add a new one if necessary.

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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.

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.

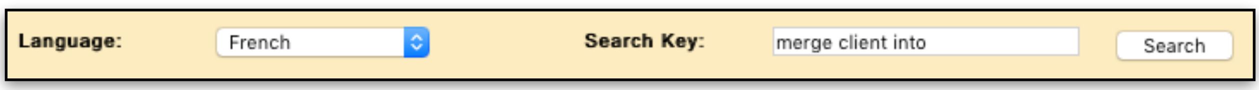

Figure 676 - Searching for Equivalent Translation

7. As can be seen in Figure 677, no equivalent translation has been located after performing the search.

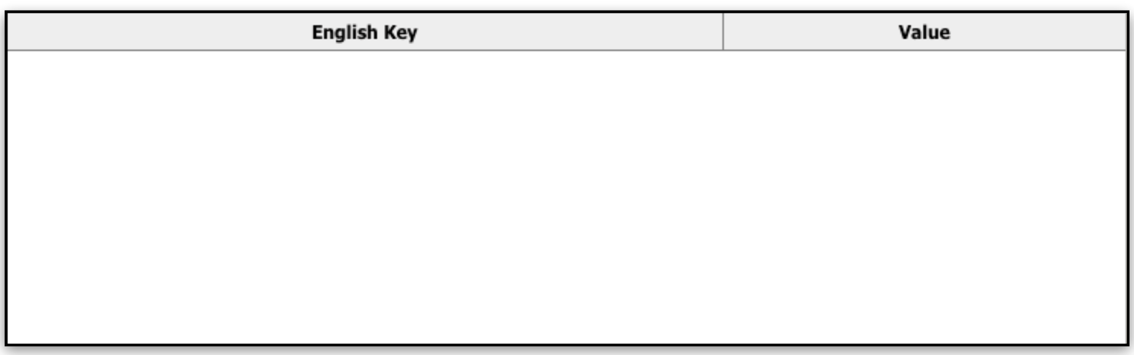

Figure 677 - No Equivalent Translation Located After Executing Search

8. In the **Key** field, enter the english text exactly as it appeared earlier on screen.

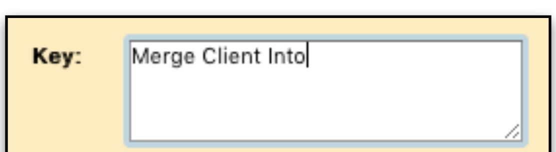

Figure 678 - Entering English Key for Translation

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9. In the **Value** field, enter the desired french text which will be used as the translation.

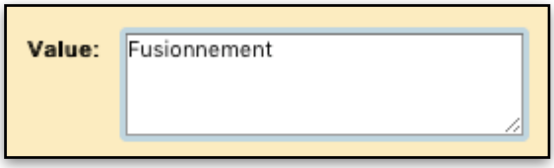

Figure 679 - Entering French Translation for English Key

10. When satisfied with the changes, click **Save** to finalize the process.

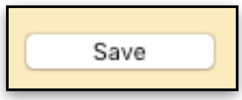

Figure 680 - Saving Translation

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

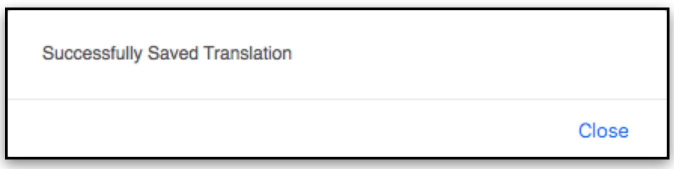

Figure 681 - Successfully Saved Translation

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.

Figure 683 - Reviewing Newly Added Translation

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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.

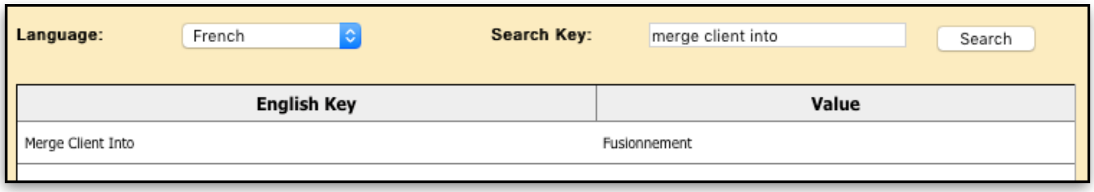

Figure 684 - Modifying an Existing Translation

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.

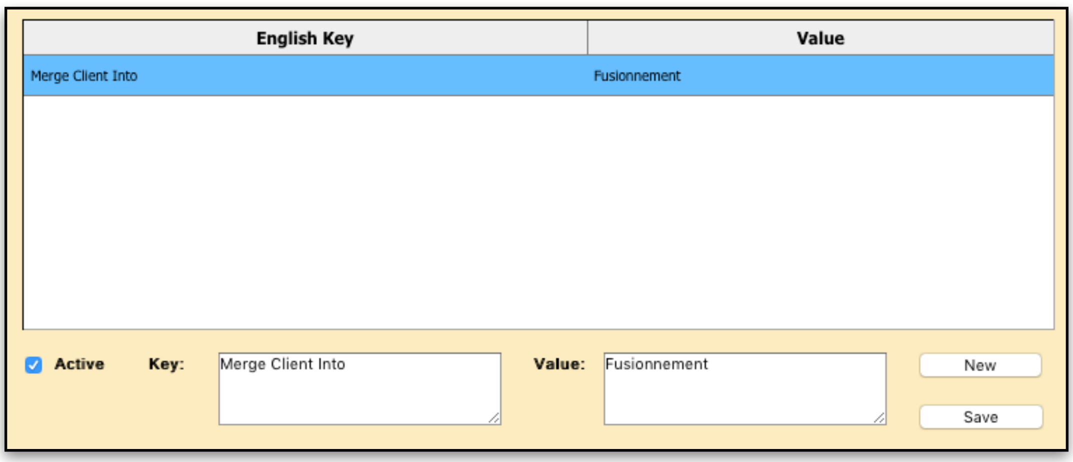

Figure 685 - Located Translation Which is to be Modified

6. Modify the **Value** field as necessary.

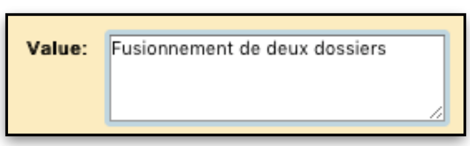

Figure 686 - Modifying Existing Translation

7. When satisfied, click **Save** to finalize the process.

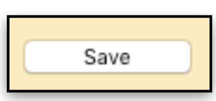

Figure 687 - Saving Translation

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

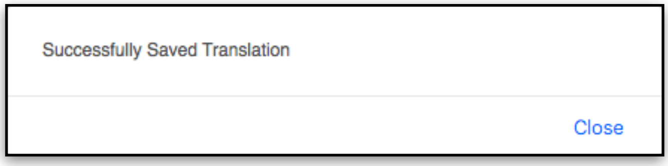

Figure 688 - Successfully Modified Translation

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

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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.

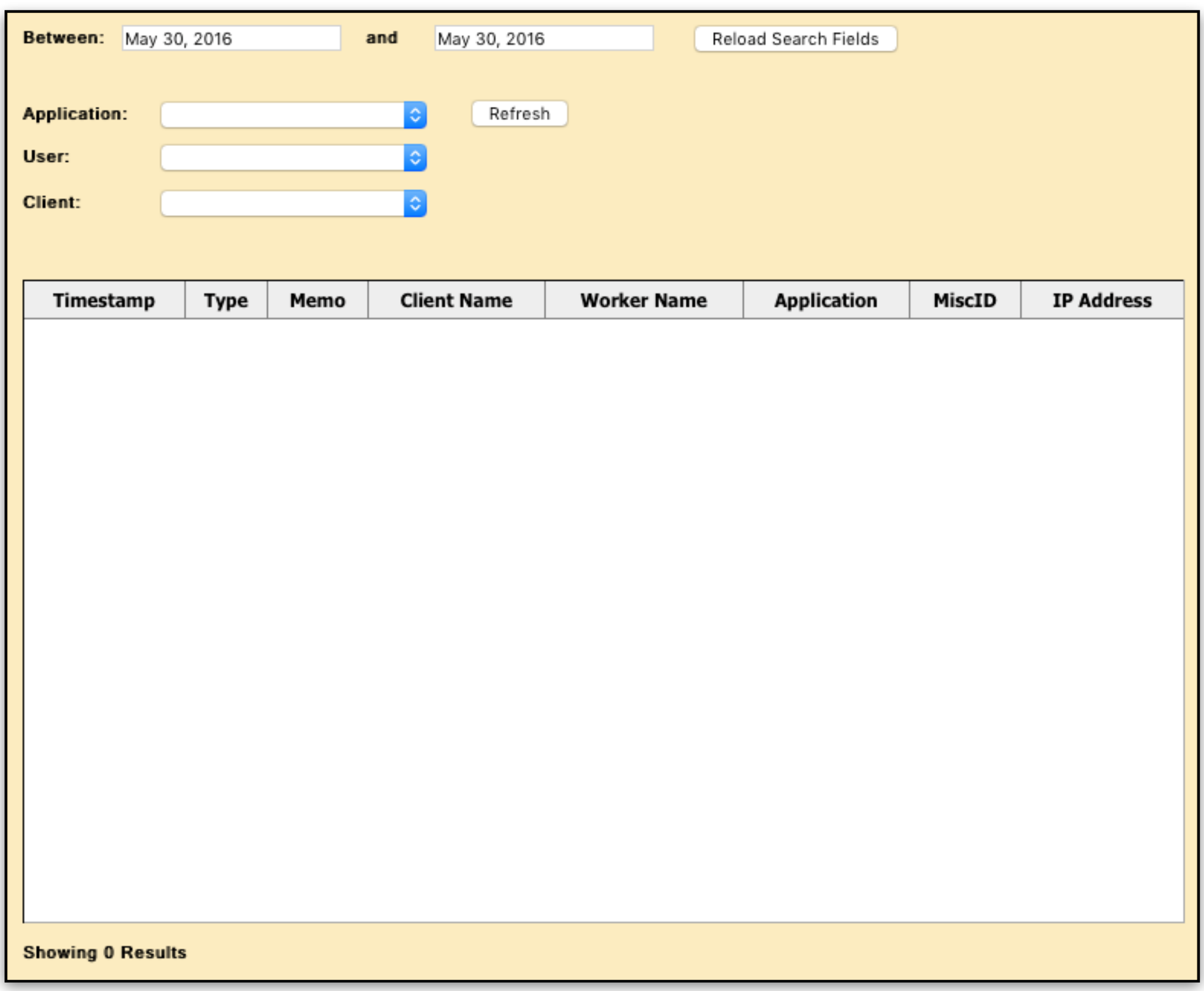

Figure 702 - Audit Log Module

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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.

Figure 703 - Modifying Audit Log Review Dates

6. When satisfied with the inputted parameters, click **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.

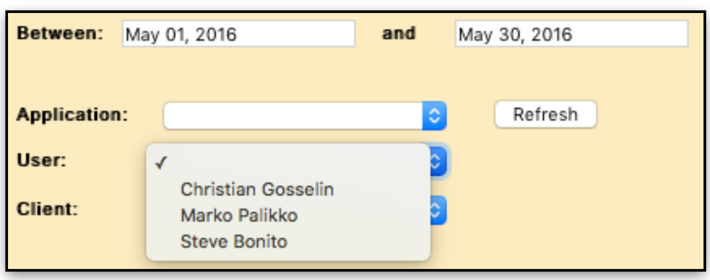

Figure 705 - Audit Log User Drop Down Refreshed

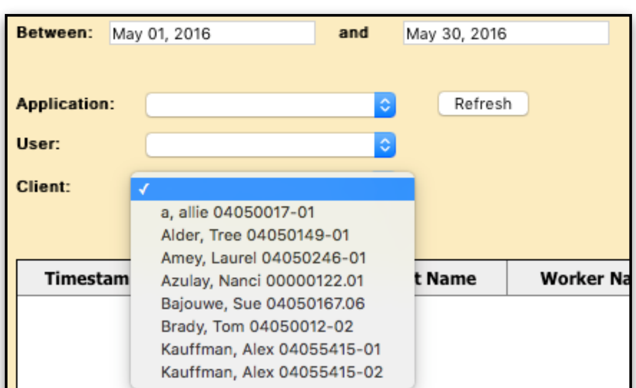

Figure 706 - Audit Log Client Drop Down Refreshed

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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.

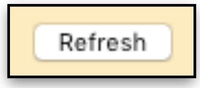
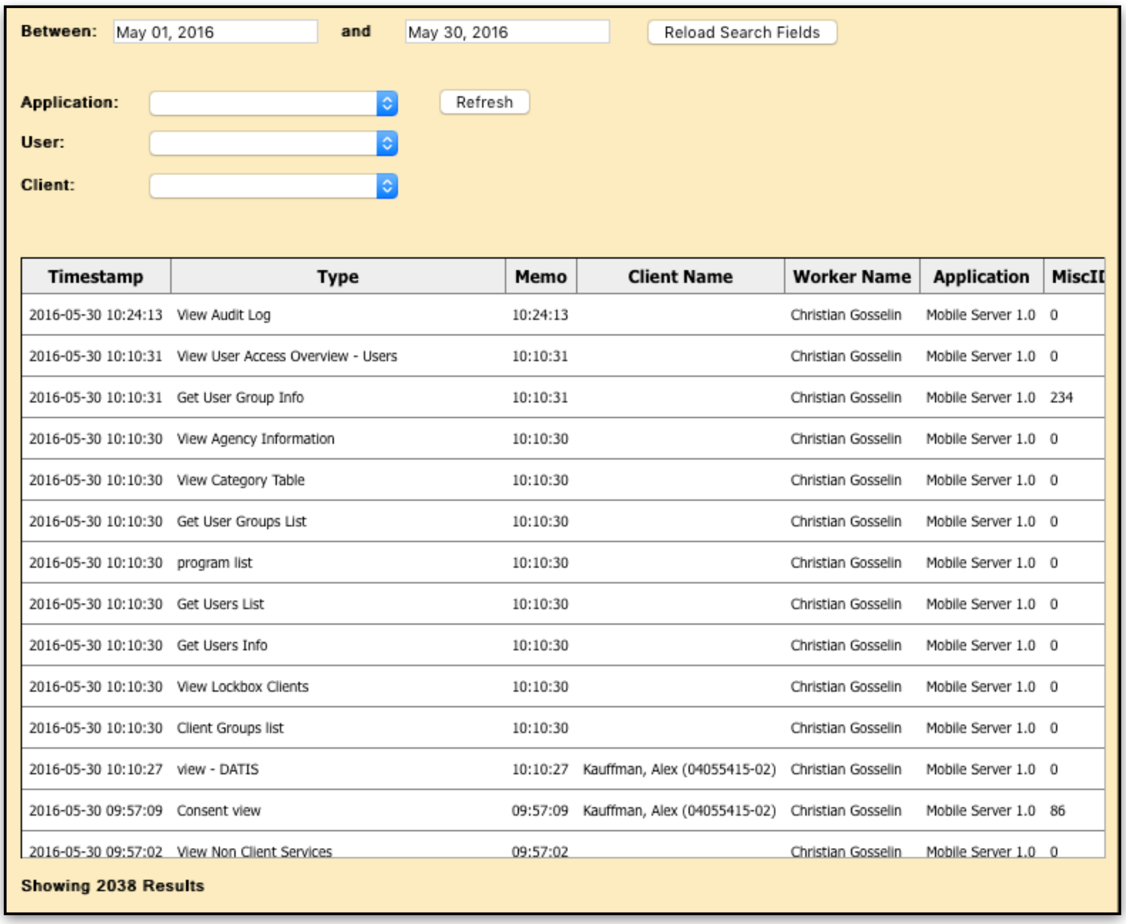


Figure 707 - Refreshing Audit Log Results

12. This is demonstrated in Figure 708.



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

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.

Figure 709 - Using Audit Log Filters

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15. In Figure 710, an Administrator is filtering for a users' transactions with occurred with a particular client.

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.

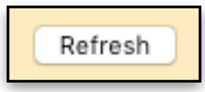
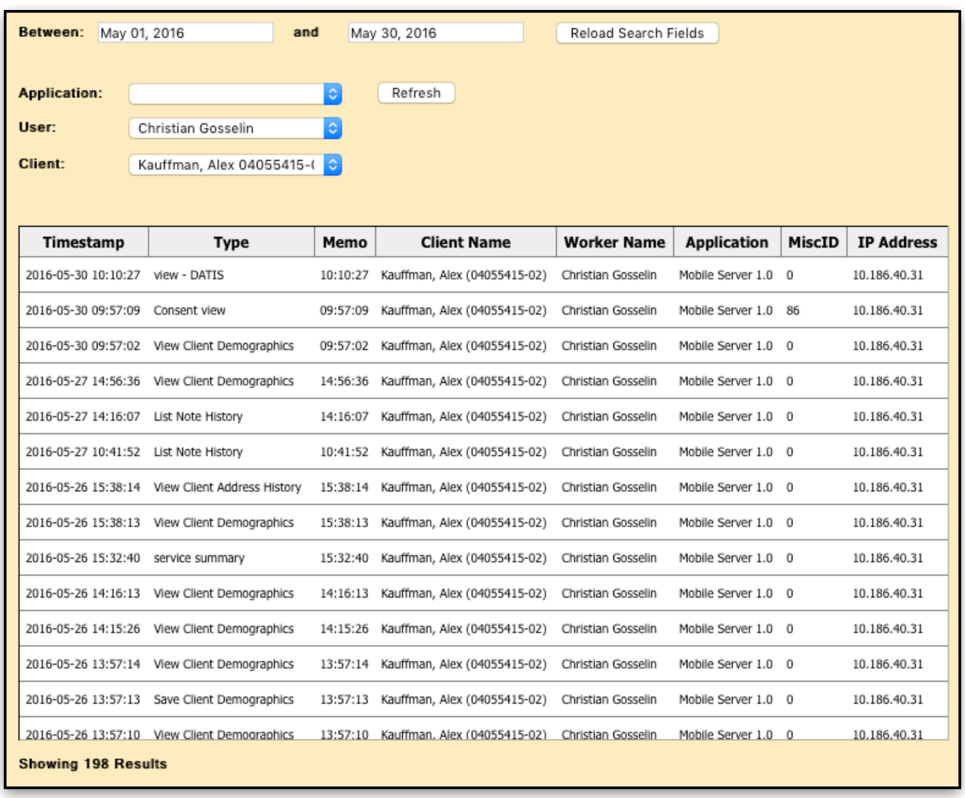


Figure 711 - Refreshing Audit Log When Using Audit Log Filters

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-(

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

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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.

Figure 713 - Agency Information Module

3. The Agency Information module will then be loaded on screen.

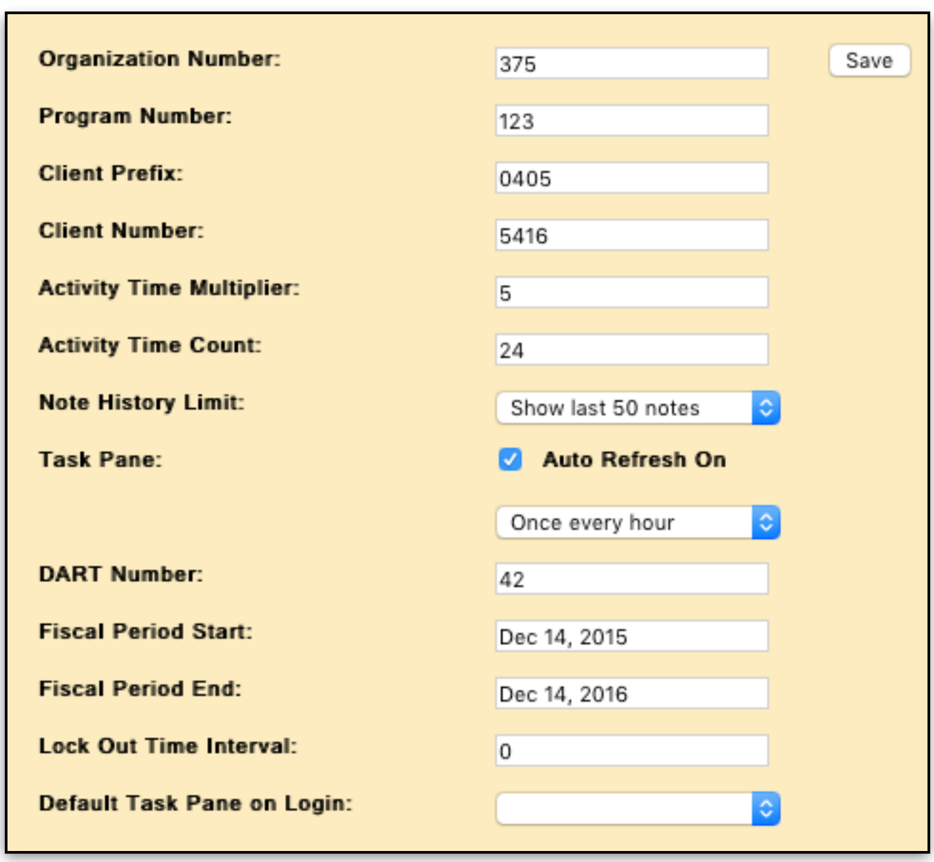

Figure 714 - Agency Information Module

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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 logins.

5. Upon modifying any of these settings, click **Save** to finalize the process.

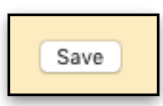

Figure 715 - Saving Agency Information

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

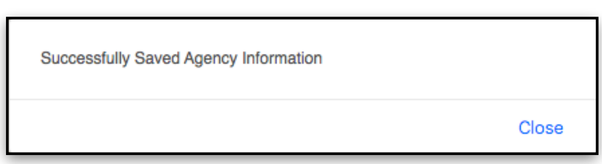

Figure 716 - Successfully Saved Agency Information

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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.

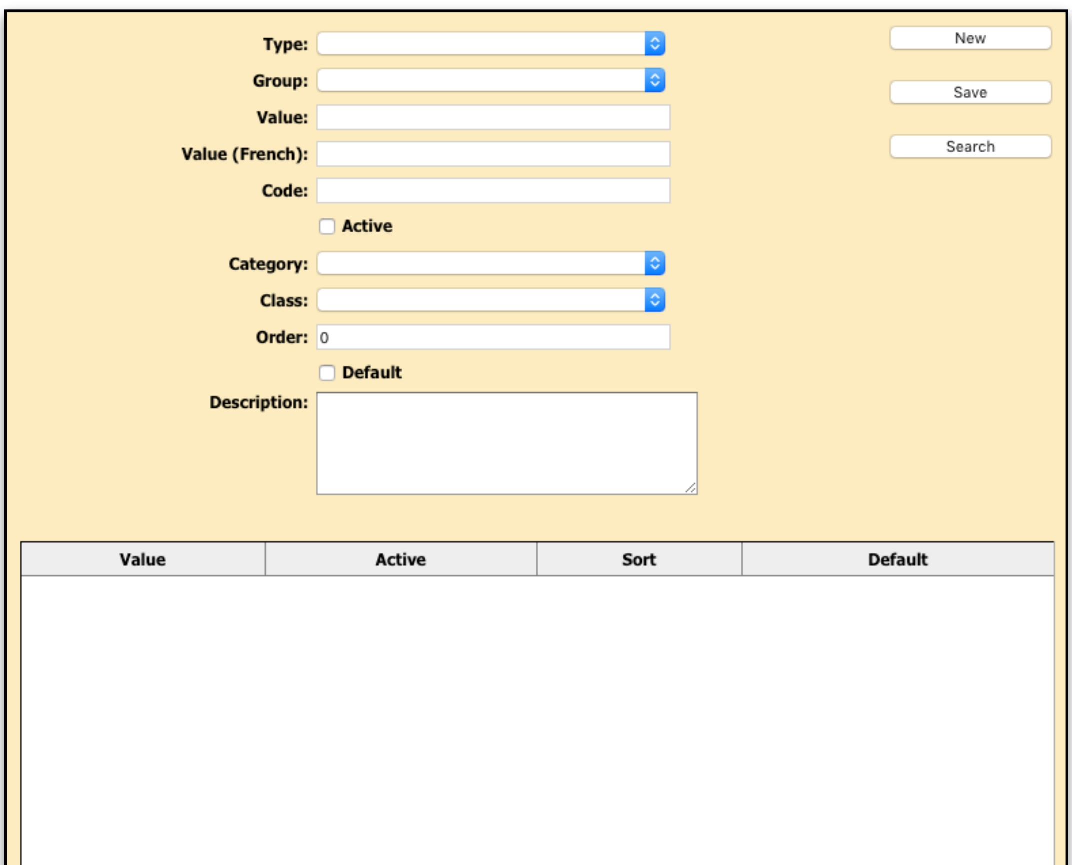

Figure 718 - Category Table Module

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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.

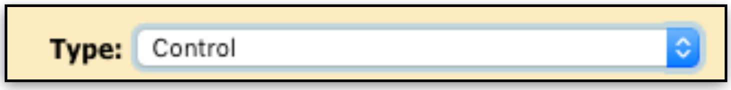

Figure 719 - Selecting from the “Type” Drop Down

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.

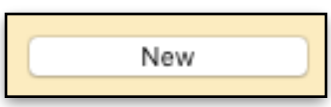

Figure 721 - Creating a New Drop Down Value

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.

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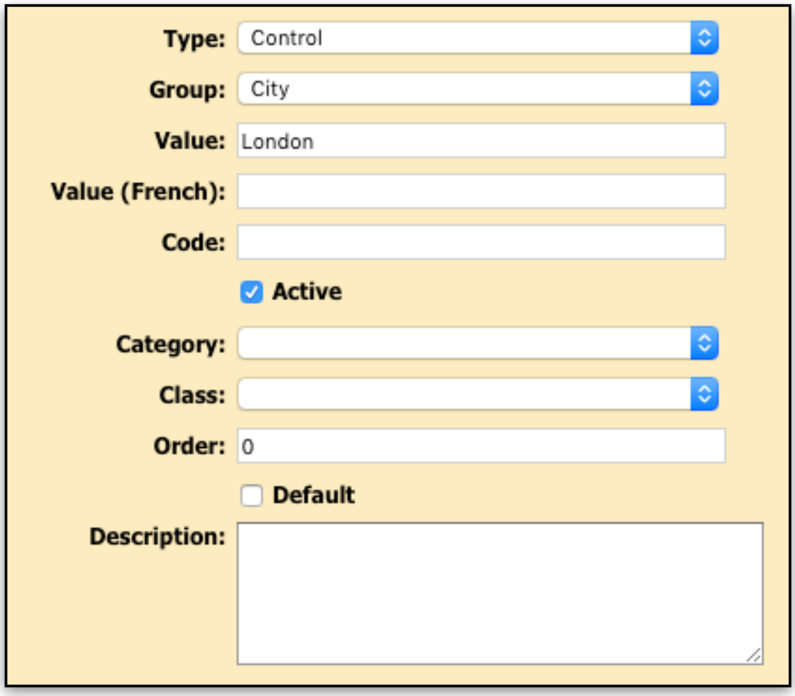


Figure 722 - Adding a New Drop Down Value

10. When satisfied with the changes, click **Save** to finalize the process.

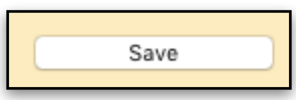


Figure 723 - Saving a New Drop Down Value

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

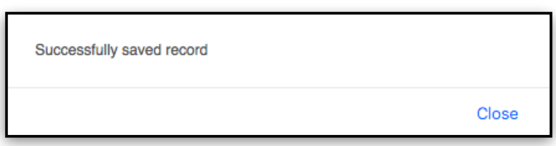
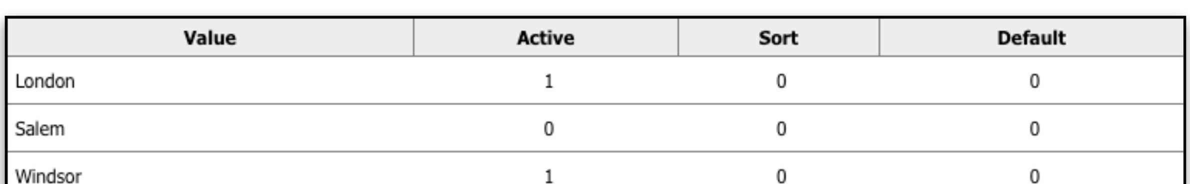


Figure 724 - Successfully Saved New Drop Down Value

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

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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**.

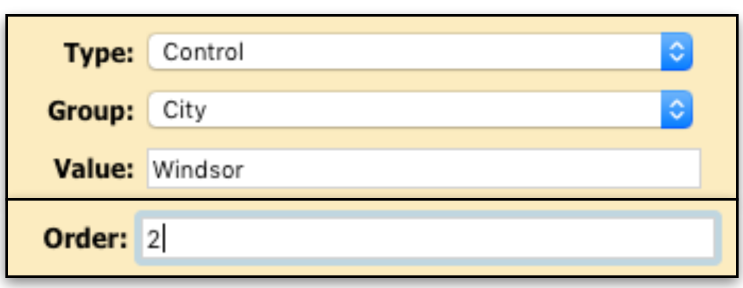

Figure 727 - Re-Sorting the "City" Drop Down

13. Click **Save** when satisfied to finalize the changes.
14. A message box will appear confirming the process was indeed successful.

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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.

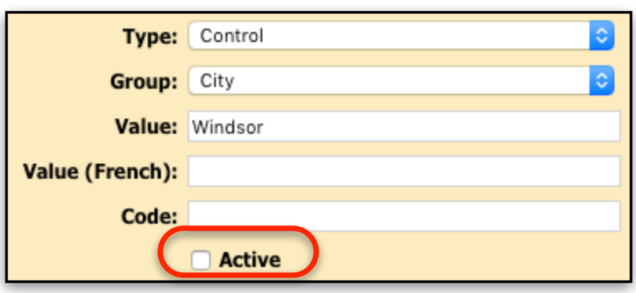

Figure 730 - Removing a Drop Down Value

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

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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.

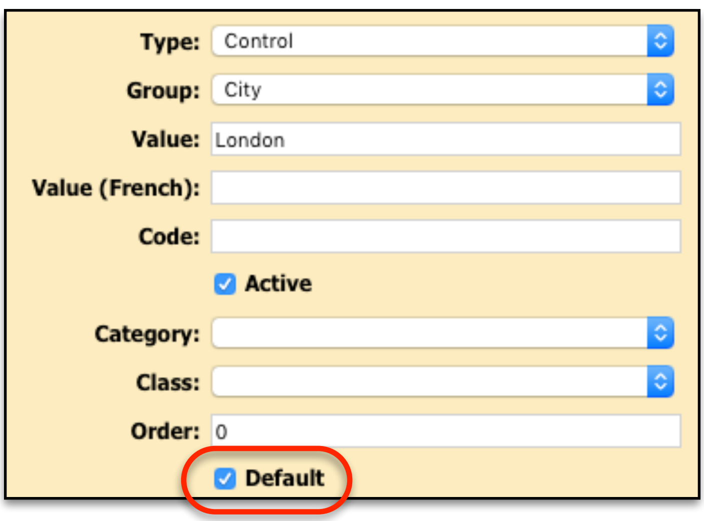

Figure 733 - Marking a Drop Down Value as a Default

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

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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.

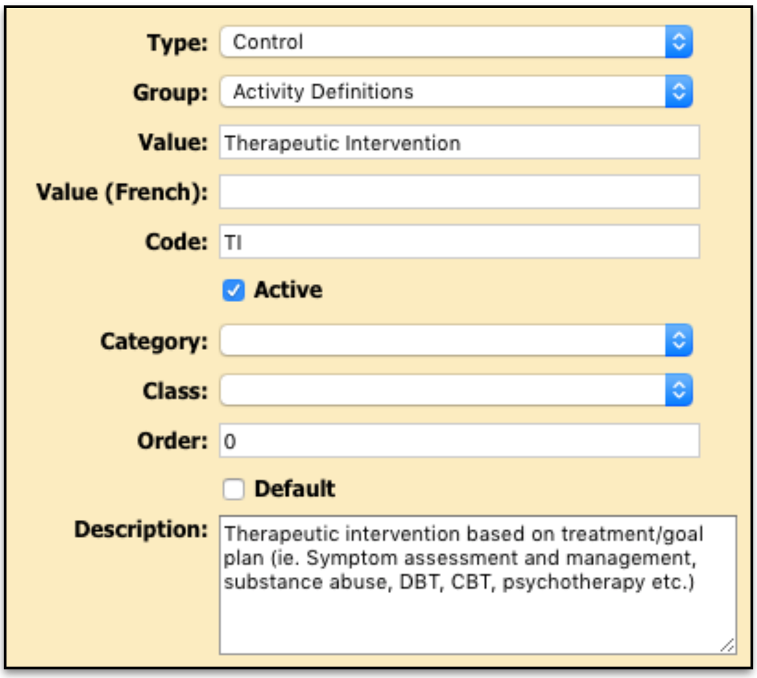

Figure 735 - Drop Down Values Which Require Extra Data

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.*

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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.

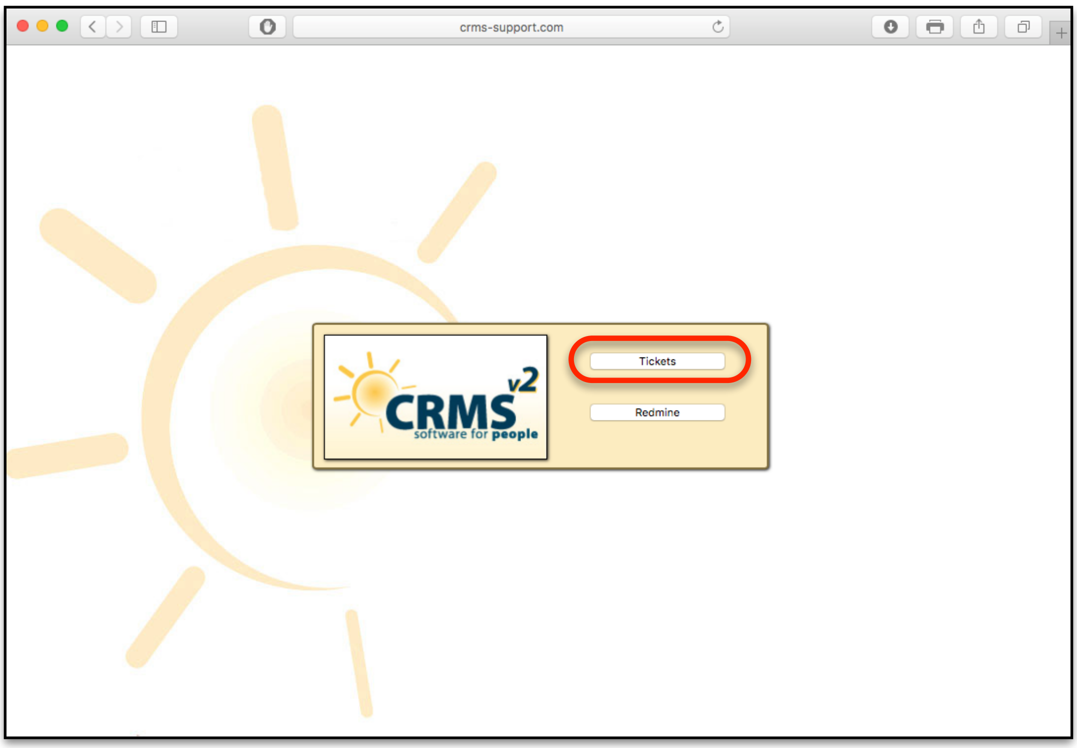

Figure 736- Submitting a Ticket to CRMS Support

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.

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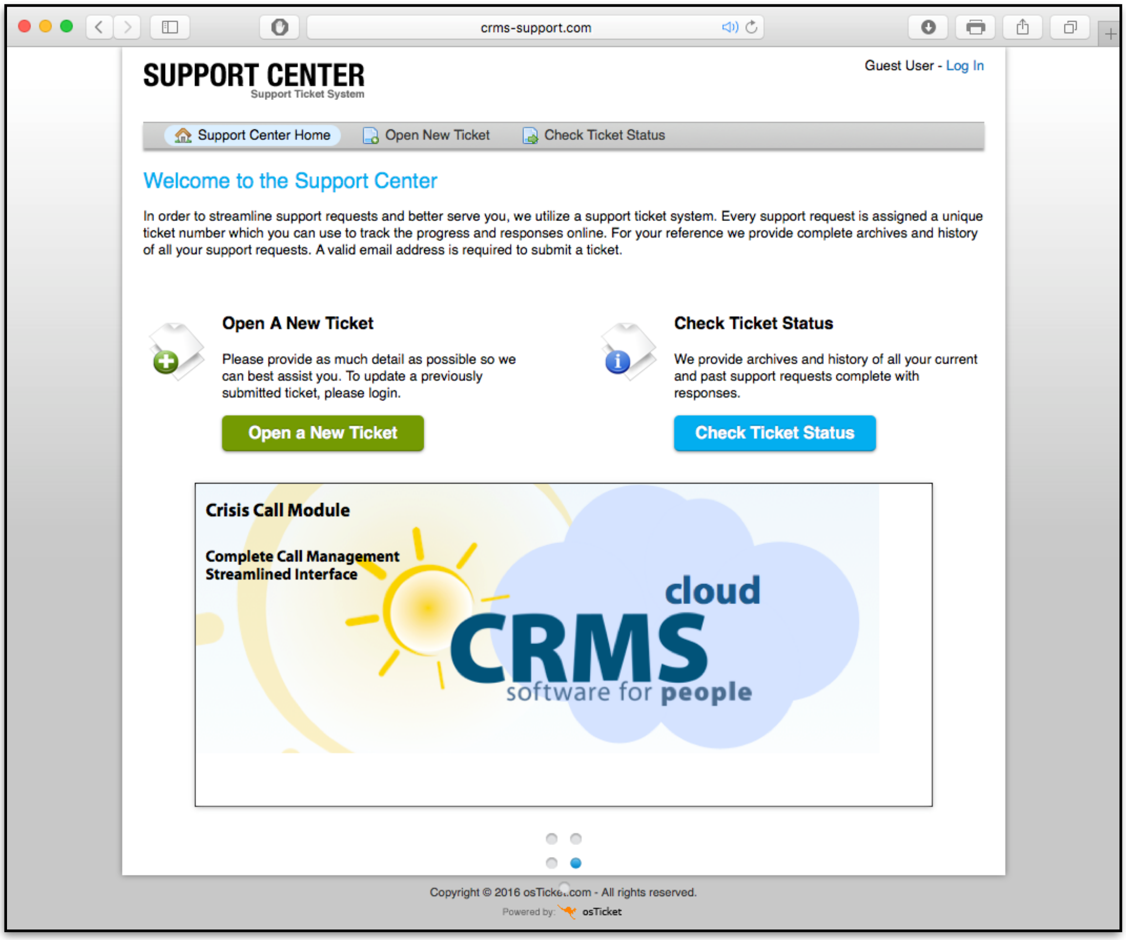

Figure 737 - Accessing Ticketing System

Opening a New Ticket

1. To create a new ticket, click on **Open a New Ticket** as shown below.

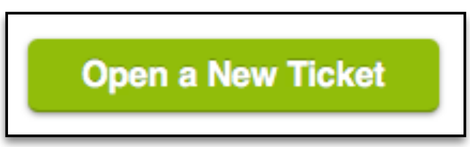

Figure 738 - Opening a New Ticket

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.

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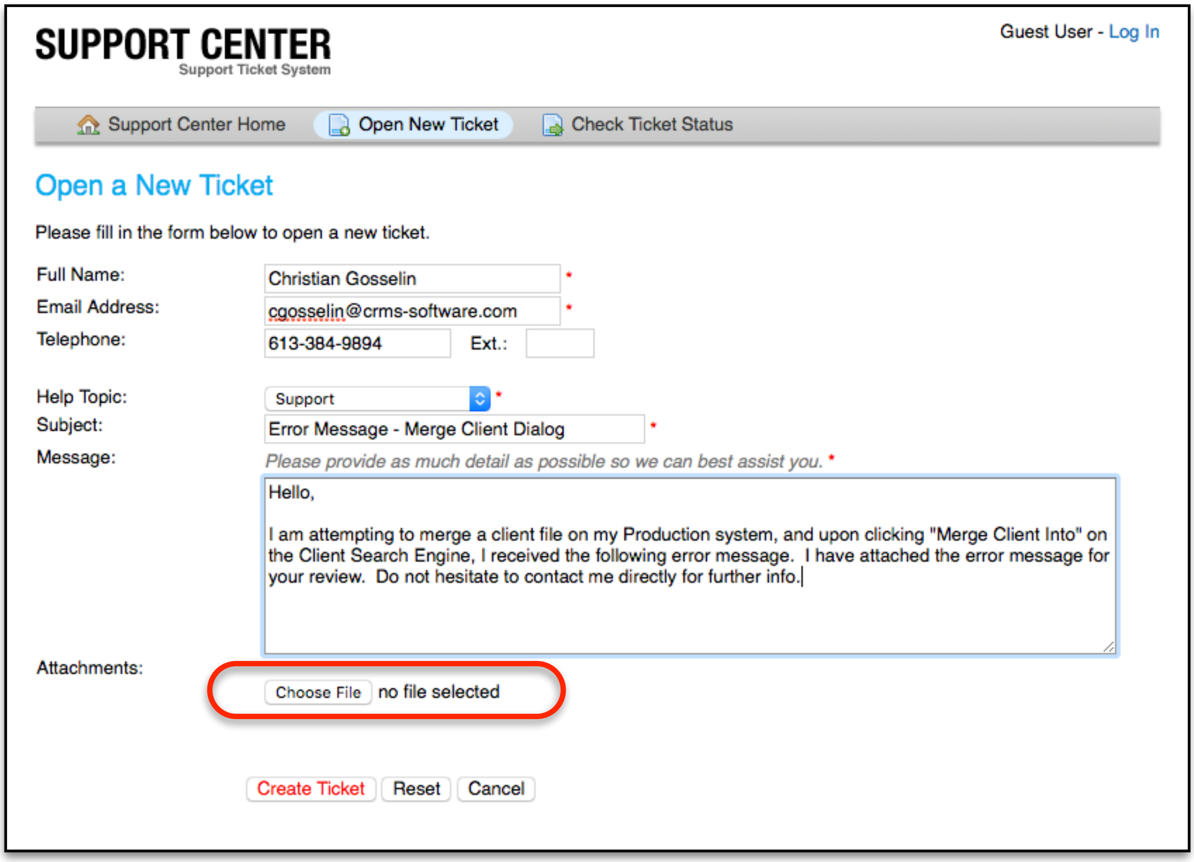

Figure 739 - Creating a New Ticket

5. Note in Figure 739 above, no attachment has been added yet. Screenshots of the issue can greatly assist CRMS Support.
6. Click **Choose File** to attach your error message.

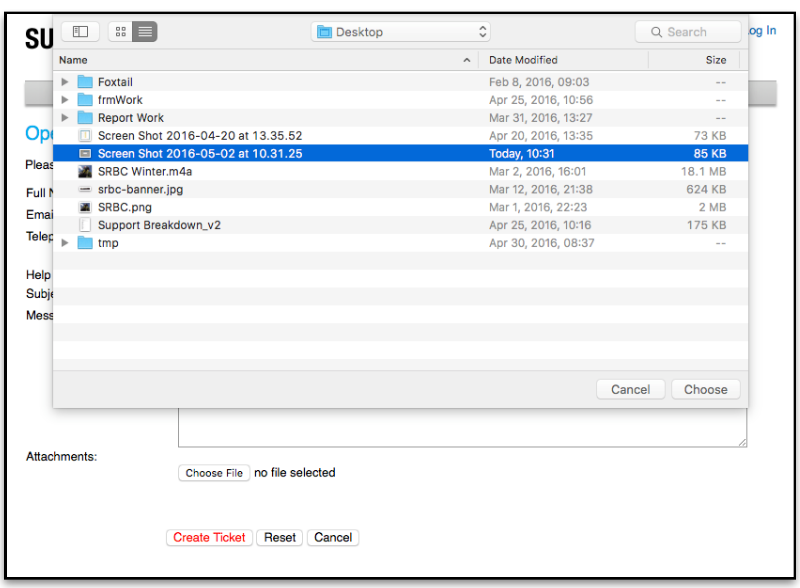

Figure 740 - Attaching Error Message

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7. The ticket will automatically refresh to confirm the attachment has been successfully added.
8. This is demonstrated below in Figure 741.

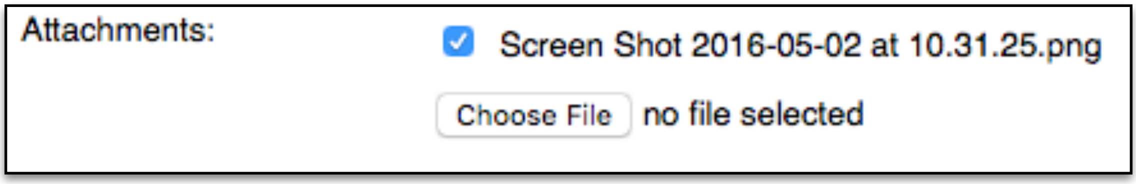

Figure 741 - Successfully Added Attachment to Ticket

***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.

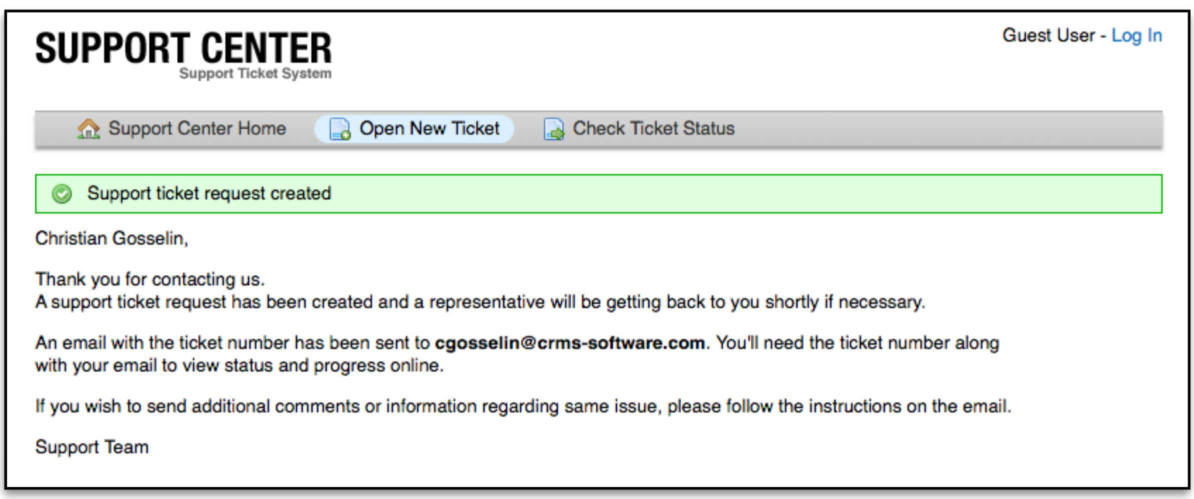

Figure 742 - Successfully Created Ticket

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 fro the Support System.

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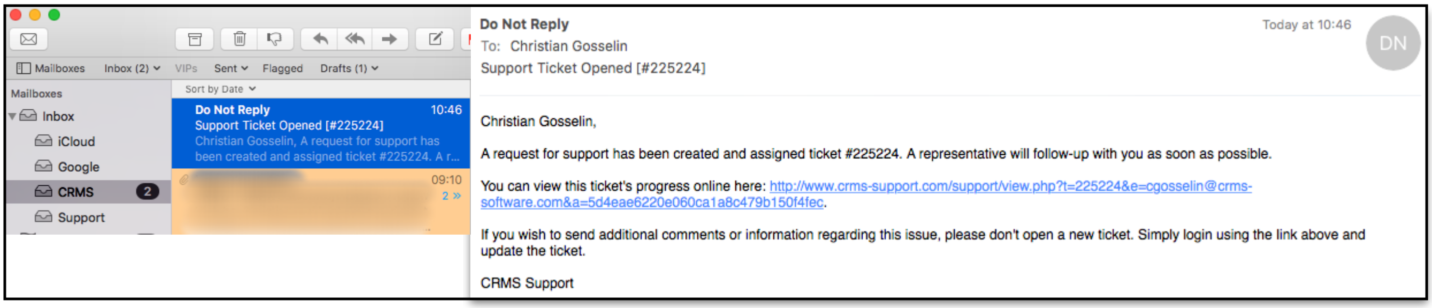

Figure 743 - Automated Email from the CRMS Support System

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.

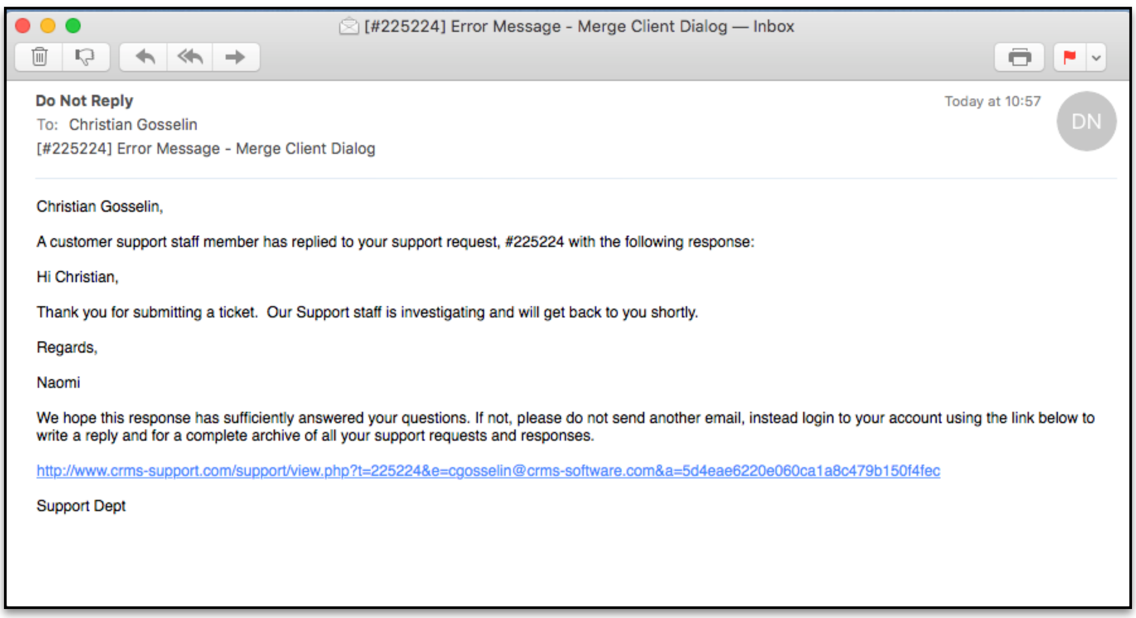

Figure 744 - Reply Received from CRMS Support

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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.

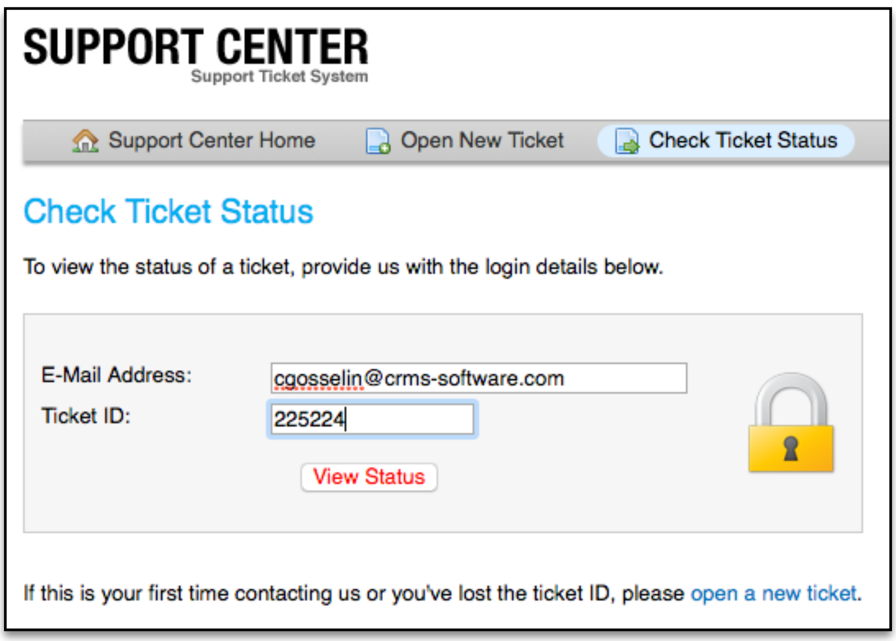

Figure 746 - Verifying Ticket Status

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.

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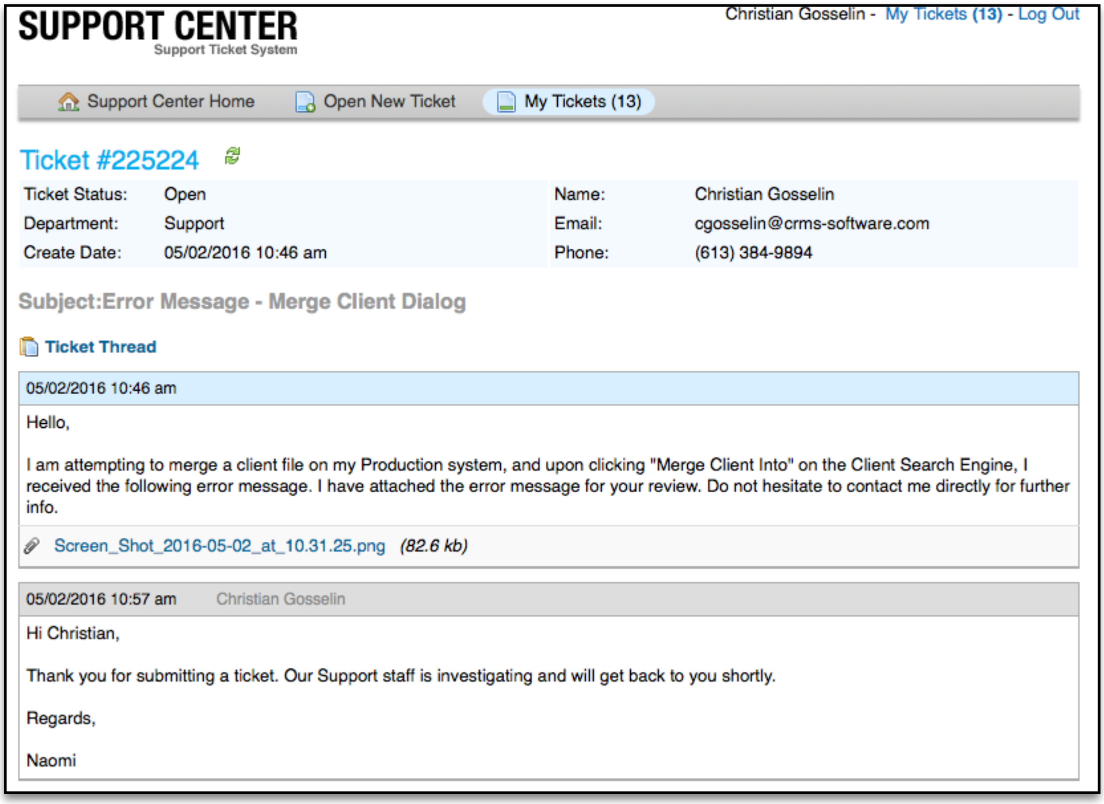

Figure 747 - Reviewing Ticket Information

7. As can be seen in Figure 747 above, a CRMS Support representative has replied to your ticket.
8. 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.

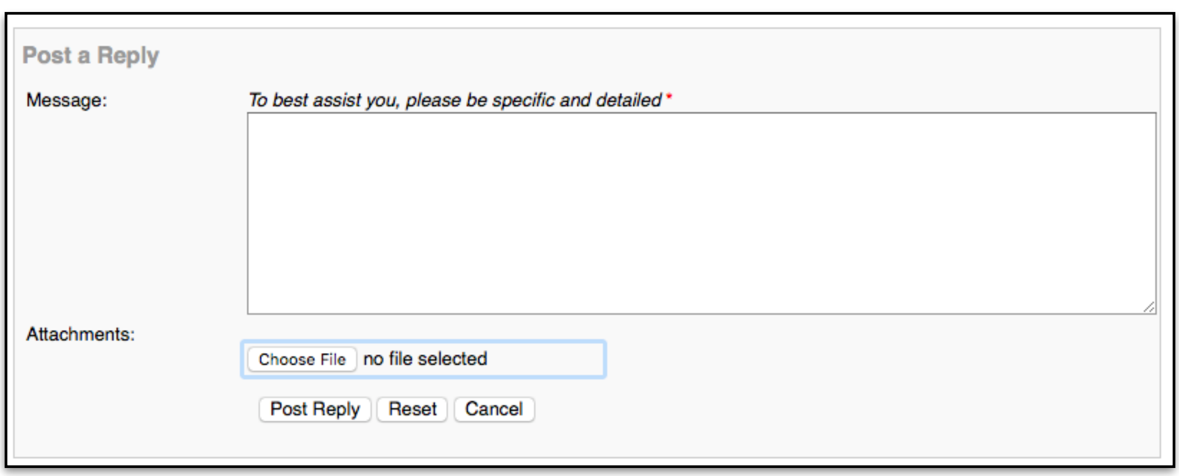

Figure 748 - Replying to an Open Ticket

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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.

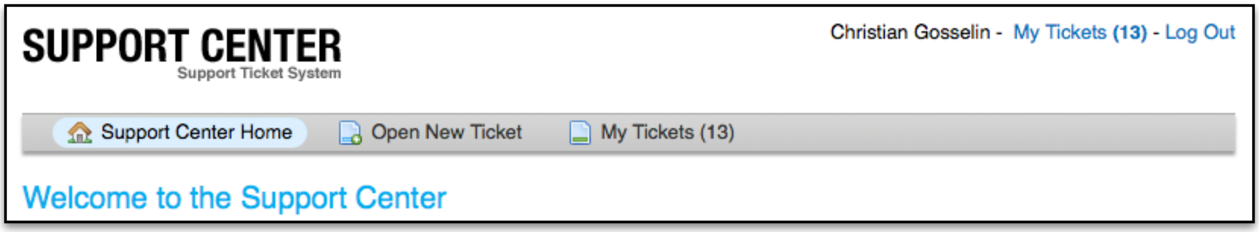
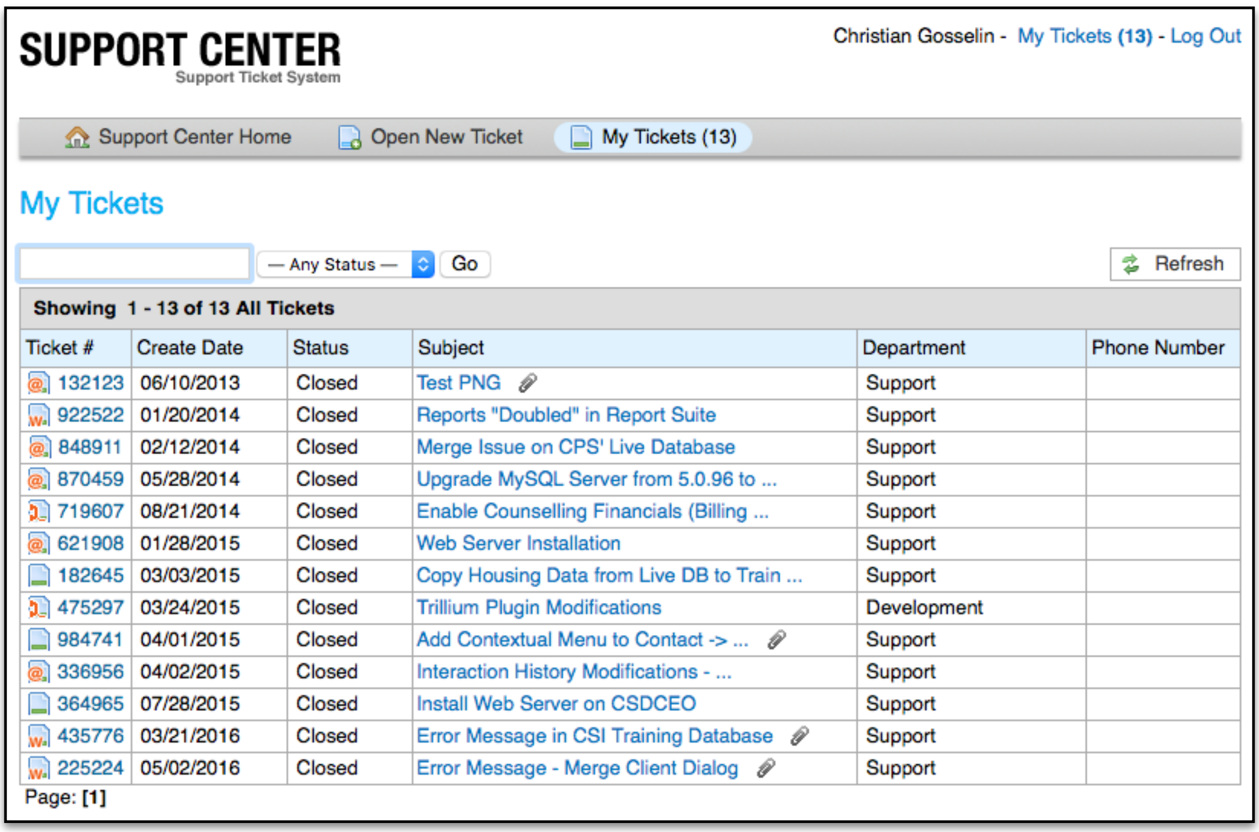


Figure 749 - Accessing Ticket History

11. The Support Center will then refresh to show all tickets open with the email address used to open tickets.



Ticket #	Create Date	Status	Subject	Department	Phone Number
132123	06/10/2013	Closed	Test PNG	Support	
922522	01/20/2014	Closed	Reports "Doubled" in Report Suite	Support	
848911	02/12/2014	Closed	Merge Issue on CPS' Live Database	Support	
870459	05/28/2014	Closed	Upgrade MySQL Server from 5.0.96 to ...	Support	
719607	08/21/2014	Closed	Enable Counselling Financials (Billing ...	Support	
621908	01/28/2015	Closed	Web Server Installation	Support	
182645	03/03/2015	Closed	Copy Housing Data from Live DB to Train ...	Support	
475297	03/24/2015	Closed	Trillium Plugin Modifications	Development	
984741	04/01/2015	Closed	Add Contextual Menu to Contact -> ...	Support	
336956	04/02/2015	Closed	Interaction History Modifications - ...	Support	
364965	07/28/2015	Closed	Install Web Server on CSDCEO	Support	
435776	03/21/2016	Closed	Error Message in CSI Training Database	Support	
225224	05/02/2016	Closed	Error Message - Merge Client Dialog	Support	

Figure 750 - Reviewing Ticket History

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