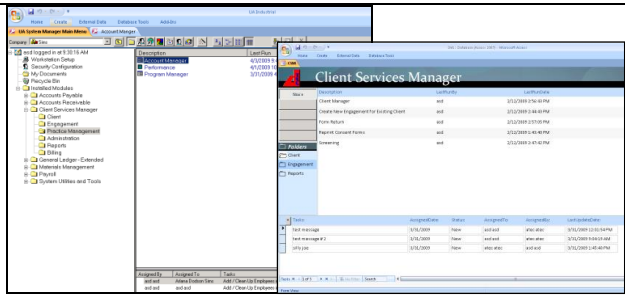


CSM / MH Client Services Manager Mental Health v2.0

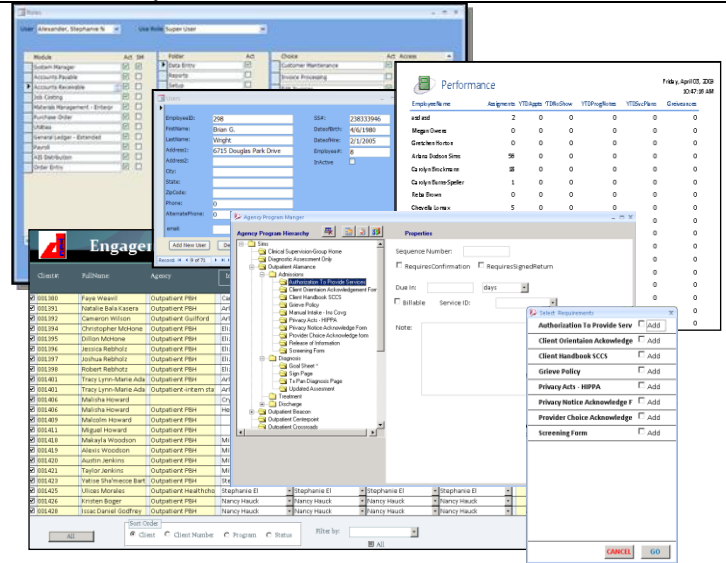
User Interface:

- Easy to use – Menu System
- Stand Alone user interface or Integrated UA Interface - Optional
- Role Specific Security Access
- Assigned access to client data
- Integrated Task Manager:
 - Allows assignment and tracking of tasks between system users.



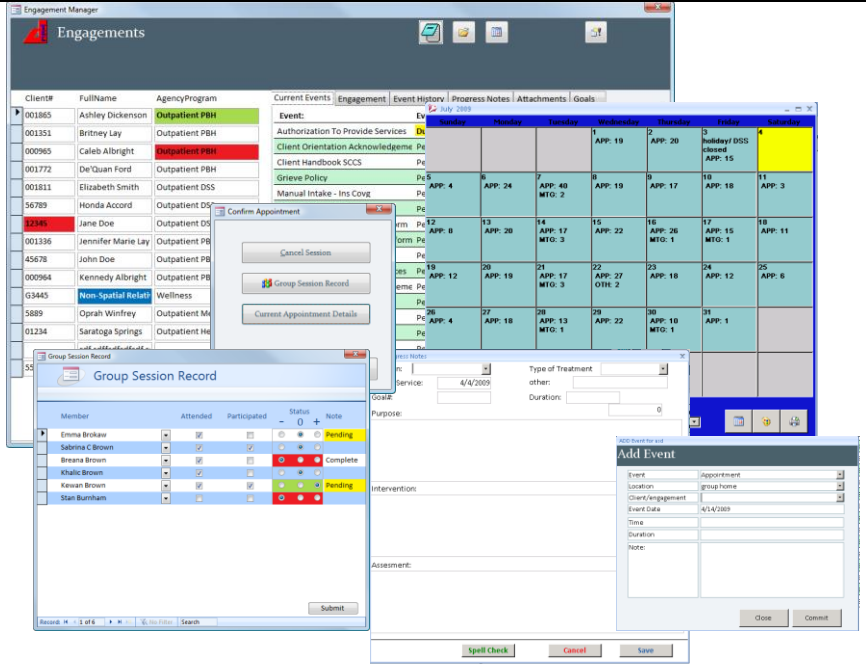
Administration/ Practice Management

- Users**
- Roles:** support 5 role levels
- Security –**
 - Network Level Password
 - Application Level password
- Program Definition**
 - Program Rules
 - Processing Steps
 - Work Items
 - Documents
 - Tasks
- Group(s) Definition**
 - Assign Members
- Account/Engagement Assignment**
 - Active/inactive
 - Assign/ re-assign resource by step
- Performance Management**
 - Track

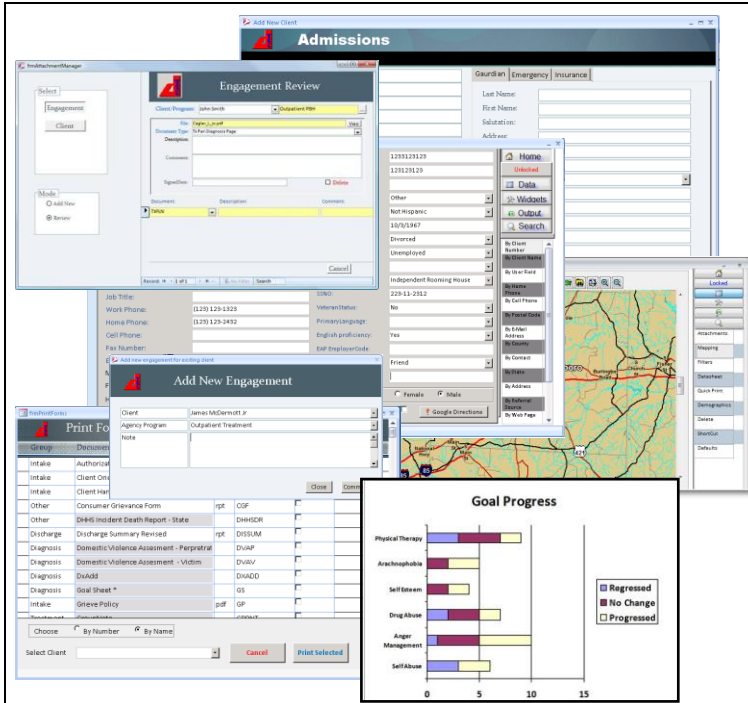


Engagement Manager

- Client Application Tracking
- Client Diagnosis Management
- Client Case Management
- Group Session Management
 - Attendance
 - Participation
 - Progress
- Document tracking
- Bar coded document tracking (optional)
- Event History
- Attachments (scanned, files, etc)
- Client notes
- Progress Reports Client/ Group
- Scheduling / Appointment Calendar
 - By Professional
 - Client, Group or Resource
- Service Plans/ Goals
- Consulting Therapist








CSM / MH Client Services Manager Mental Health v2.0







The screenshots show the following modules:

- Admissions:** A form for adding a new client with fields for name, address, and contact information.
- Engagement Review:** A form for reviewing client engagement with dropdown menus for status and date.
- Add New Engagement:** A form for adding a new engagement with fields for client name, agency program, and notes.
- Print Form:** A form for printing client information.
- Goal Progress:** A bar chart showing progress for various goals like Physical Therapy, Anachaphobia, Self Esteem, Drug Abuse, Anger Management, and Self Abuse. The chart uses a color-coded legend: Regressed (blue), No Change (red), and Progressed (green).




Program Admissions

-  Record Initial Client Data
-  Print Bar Coded Consent Forms
-  Track Applicants / forms receipt
-  Verify applicant data
-  Hand off to Diagnostics









Client Manager

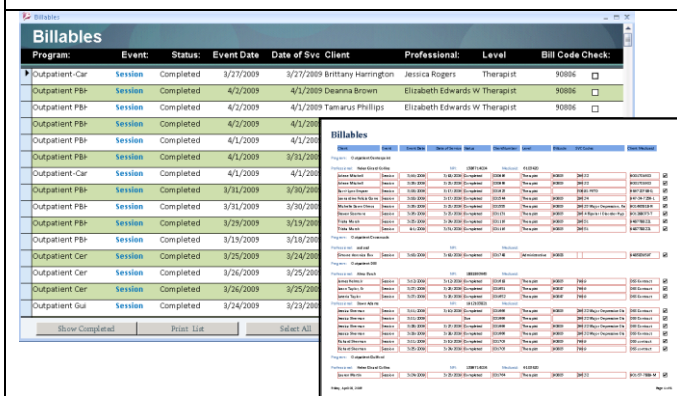
-  Client Profile, Event history
-  Contacts
-  Consent Forms History, Notifications.
-  Geographic Mapping, Google Directions

Document Management

-  Collect and file returned documents
-  Attach scanned documents
-  Attach files (word docs, e forms, pdf, etc)

Forms / Reports:

-  Admissions (7)
-  Assessments(4)
-  Notifications/ Consents (17)
-  Progress Notes
-  Program Specific Forms
-  Professional , Client Audit
-  Client, Group Progress Charts
-  Community Demographics











The screenshots show the Billables module with a list of sessions and a detailed billable report.









Program	Event	Status	Event Date	Date of Svc	Client	Professional	Level	Bill Code	Check
Outpatient-Car	Session	Completed	3/27/2009	3/27/2009	Brianary Harrington	Jessica Rogers	Therapist	90056	<input type="checkbox"/>
Outpatient-PBI	Session	Completed	4/2/2009	4/2/2009	Deanna Brown	Elizabeth Edwards W	Therapist	90056	<input type="checkbox"/>
Outpatient-PBI	Session	Completed	4/2/2009	4/1/2009	Tamarus Phillips	Elizabeth Edwards W	Therapist	90056	<input type="checkbox"/>

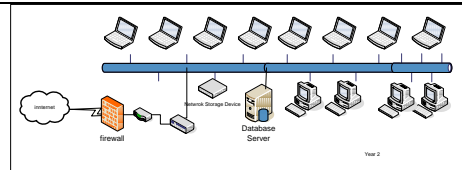
The detailed billable report shows columns for Program, Event, Status, Event Date, Date of Svc, Client, Professional, Level, Bill Code, and Check.

Billing






-  Open items to be Billed
-  Create and manages billing batches
-  Print Batch
-  Recall batches
-  Process bills into Accounting -- Optional
-  AP 1009 Payables Contract service Providers - Optional
-  AR invoices for billing party - Optional
 - Programs
 - Customer
 - Insurance Carriers
-  Electronic Bill submission with optional EDI interface module. - Optional

Accounting Integration: UA -- Optional

-  Customers: Program, insurance, third party payee
-  Vendors: 1009 Service Providers
-  Employees
-  Services and Products
-  Pricing by agency/customer/ employee certification level
-  Work Locations
-  User level Security
-  Full mid range accounting AR/AP/GL/PR



System:

-  Multi user
-  Database Driven (MS SQL)
-  Centralized Database
-  Remote Data Entry (optional)
-  Windows XP/Vista User interface.