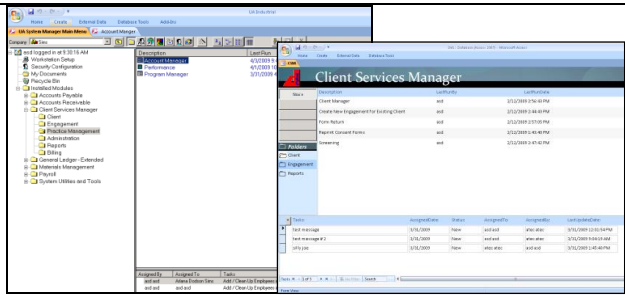


CSM / MH Client Services Manager Mental Health v2.0

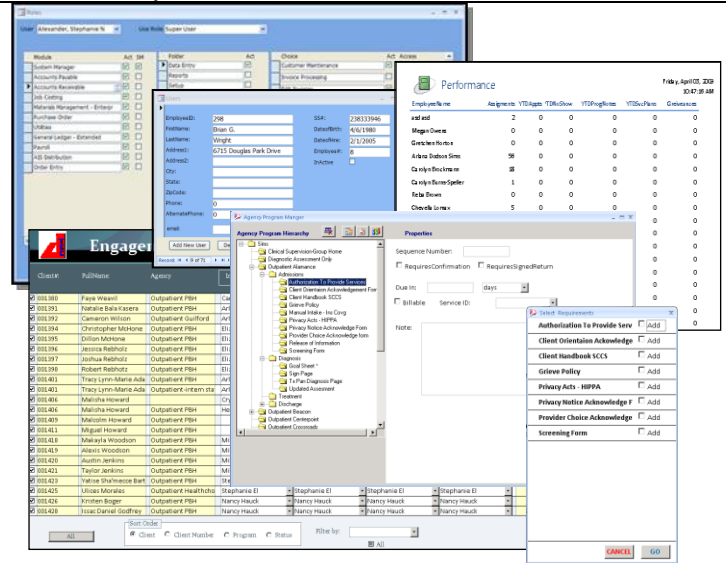
User Interface:

- 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.



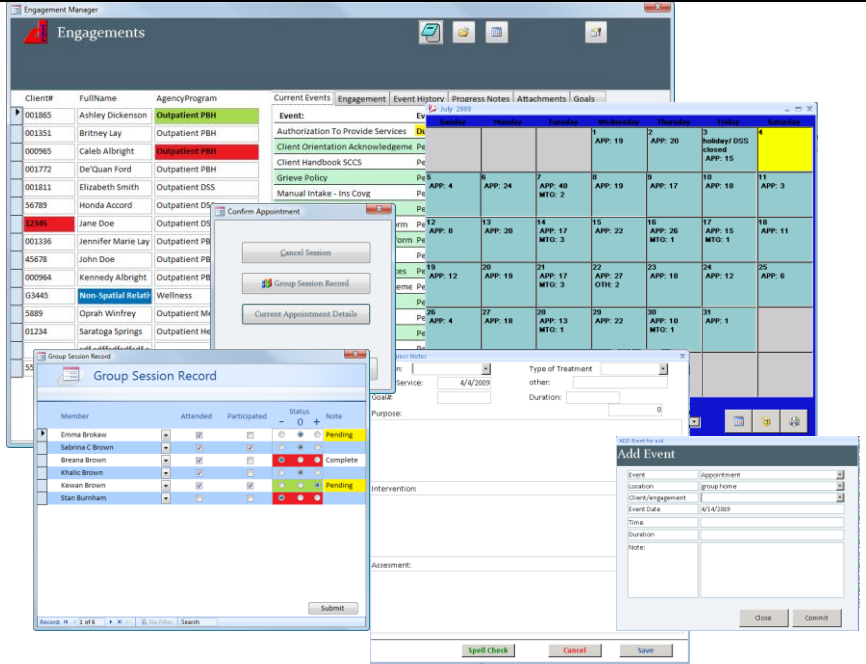
Administration/ Practice Management

- 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



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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:

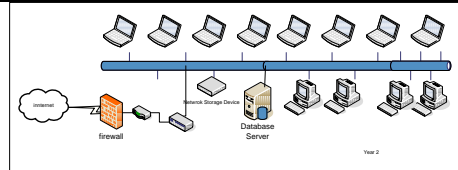
- Admissions (7)
- Assessments(4)
- Notifications/ Consents (17)
- Progress Notes
- Program Specific Forms
- Professional , Client Audit
- Client, Group Progress Charts
- Community Demographics

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
 - o Programs
 - o Customer
 - o 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.