

Client Process Monitoring System

Using the CPMS E-formTM *(Version 4.0)*

(To Submit Data Electronically)



Developed by
Addictions and Mental Health Services Division
Office of Information Services
Department of Human Services
State of Oregon

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Visual Table of Contents

The screenshot shows the CPMS A&D Electronic Forms Client Center application window. The menu bar includes: File, Edit, View, Show, Reports, Admin, Backup, Restore, Export, Print, Preview. The main window displays a list of client records with columns: Case No, Type, Open Date, Close Date, Provi..., Export (...), Export (...), Modified By. The records listed are: Beaver, Benny; Bice, Bo; Bush, George; Clinton, Hillary; Crane, icabob; Dumpty, Humpty; kahn, ben; poodre, snepnera; robin, christopher; Spears, Brittany. Callout boxes point to the following menu items and page numbers: Logoff (Page 37), Preferences (Page 66), View (Page 58), Show (Page 59), Delete (Page 40), Reports (Page 52), Print (Page 54), Preview (Page 57), Enrollment (Page 41), Edit Clients (Page 51), Backup (Page 64), Restore (Page 64), Admin (Page 22), Export (Page 60), Client Records Window (Page 38), Sort Window (Page 38).

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Chapter 1 - Getting Started

Installation Software & Hardware Requirements



Software requirements:

- Microsoft Windows 95, 98, 2000, 2000 ME, NT, XP or W7.
- Microsoft Access 2000, 2003, 2007 or 2010 or Access Runtime

Hardware requirements:

<u>Component</u>	<u>Description</u>
Computer	IBM-compatible
Microprocessor	Minimum: Pentium II Recommended: Pentium III or higher
RAM	Minimum: 32 megabytes Recommended: 64 megabytes or higher
Hard disk	250 megabytes of free disk space
Video monitor	EGA (or higher) The recommended video setting is 1024 x 768.
Mouse	Required
Keyboard	101 key-enhanced
Printer	Hewlett Packard-compatible with memory of at least 2 megabytes.

***Note:** The minimum RAM and Processor will run this application, but processing speed will be significantly slower. The recommended RAM and Processor will run the application quite effectively. Keep in mind that processing speed will also be affected as records accumulate.

Installing CPMS E-form Version 4.0

Please follow these instructions. AMH data team staff are available to help you walk through these instructions. Just give us a call, 503-945-5960 (ask for a CPMS E-Form Technical Support team member).

Step 1 Run A&D E-form(.exe file) It will take a few moments eventually you will see:

“Welcome to the E-forms Setup program”

Step 2 Click **Next, Next, Next, Next.**

Step 3 You will see:

“Setup has finished installing CPMS E-form . . . “

Click **Finish.**

That’s it. You should now have a new icon on your desktop.

Installing on a Network: Please call an AMH technician for instructions. See Technical Support section in this manual.

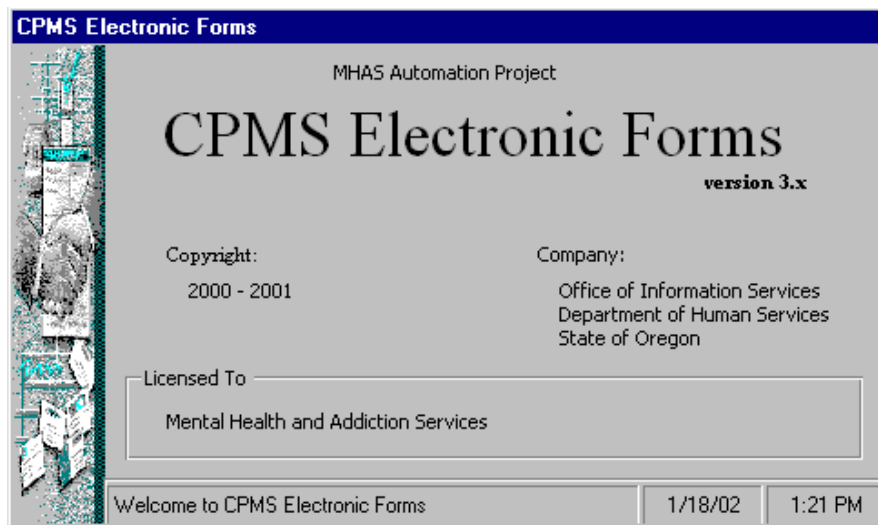
Chapter 2 - Starting CPMS Eform

Note: This chapter covers only the initial setup to get started. All of the functions of the Administration Center will be covered fully in Chapter 3.

Step 1 Start CPMS E-form by Clicking on the Eform Icon on your Desktop.

Opening Screen

The first screen you will see is the Welcome Screen.



First time using Eform

If this is the first time you have used the CPMS Eform, or the header record is missing, you will get the following message.



After reading the notice, click ok, and the Administration Center screen will appear:

NOTE: You must enter an export header or you will not be able to close the following screen.

Enter Export Header

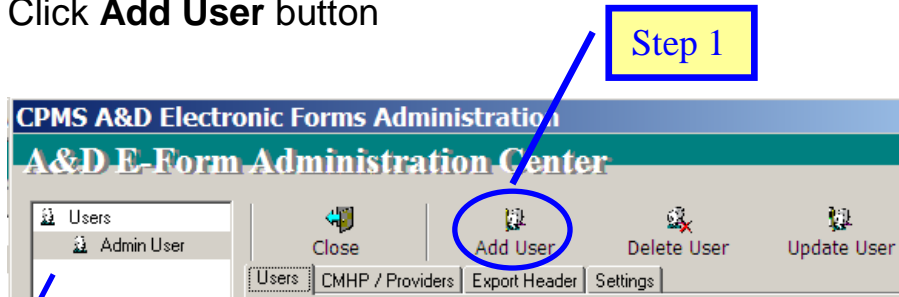
- Step 1** Enter Agency Name (e.g. Clackamas County Mental Health)
- Step 2** Enter the Contact Person. (This is the person that the AMH data team would contact if they have questions.)
- Step 3** Enter the contact Person's telephone number.
- Step 4** Enter CMHP Number. (e.g. 03)
- Step 5** Enter Main Provider # (e.g. 001)

Note: You can edit any of the entries on this screen by double clicking to highlight the entry you wish to change. Type in the required changes, tab to next field or select another box, changes on this screen are automatically saved.

- Step 6** When you are finished, select the **User Tab**.

Add Yourself As User

Step 1 Click **Add User** button



This will create a new record. Do the following steps below to change the entries from the new record to add yourself as administrator.

Step 2 Hit your **tab** key to move to Username.

Note: Disregard the User ID, Activation Date and expiration Date boxes, these are automatically updated by the application.

Tree View
This view lists each user in your system.

 A screenshot of the user creation form. It contains the following fields: "User ID" (7), "Activation Date" (4/ 2/2007), "Username" (fschwart), "First Name" (Fred), "Last Name" (Schwartz), "Password" (masked with asterisks), and "Access Level" (Administrator). A blue circle highlights the Username, First Name, and Last Name fields. A yellow box labeled "Step 3" has an arrow pointing to the Username field. A yellow box labeled "Step 4" has an arrow pointing to the First Name field.

Step 3 Enter your User Name, up to 8 characters. (e.g. if the your name were Fred Schwartz, you might enter fschwart)

Step 4 Enter your First Name. (e.g. Fred.)

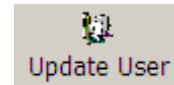
The screenshot shows a user creation form with the following fields and values:

- User ID: 7
- Activation Date: 4/2/2007
- Username: fschwart
- First Name: Fred
- Last Name: Schwartz
- Password: *****
- Access Level: Administrator

Three yellow boxes on the left indicate the steps:

- Step 5** points to the Last Name field.
- Step 6** points to the Password field.
- Step 7** points to the Access Level dropdown menu.

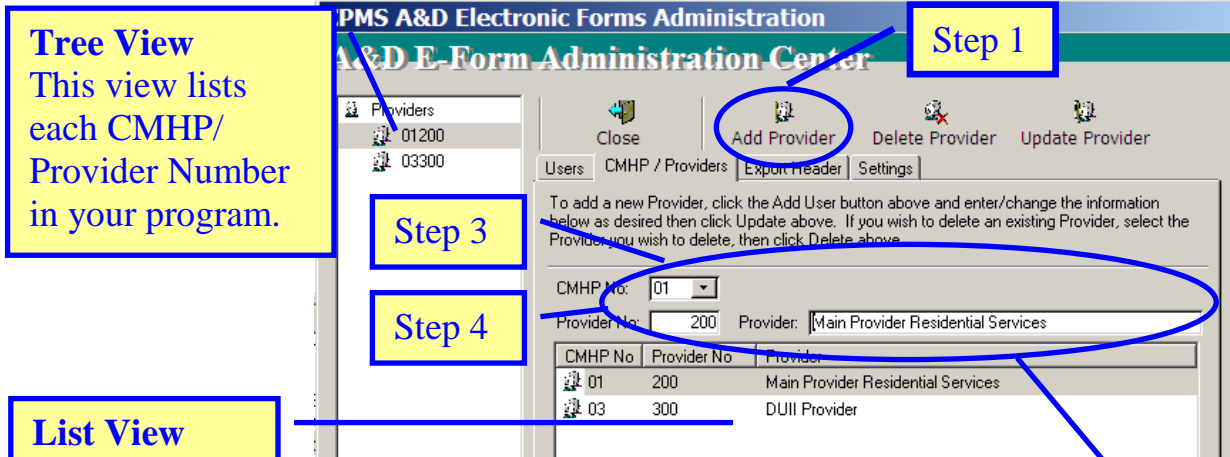
- Step 5** Enter your Last Name. (e.g. Schwartz)
- Step 6** Enter your choice of a password between 5 and 8 characters.
- Step 7** **Select Administrator for your access level.** Most other users will be employees.
- Step 8** Click **Update User** button. This will refresh the tree view with the Users name.



Repeat steps 1 - 8 above for each user you add.

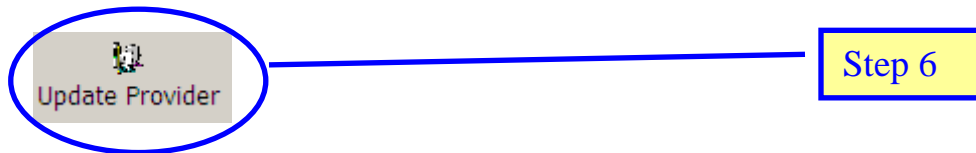
- Step 9** Select the CMHP/Provider Tab

Add New Provider



Click **Add Provider** button, this will create a new record. Do the following steps below to change the entries from the new record to the correct data for each Provider Number you use.

- Step 2** Hit your **tab** key to move to CMHP No.
- Step 3** Enter CMHP Number, This is a Drop down list, just select the correct one. (e.g. 03)
- Step 4** Enter the Provider Number. (e.g. 001)
- Step 5** Enter the Organization name Please be descriptive. (e.g. Clackamas Residential)

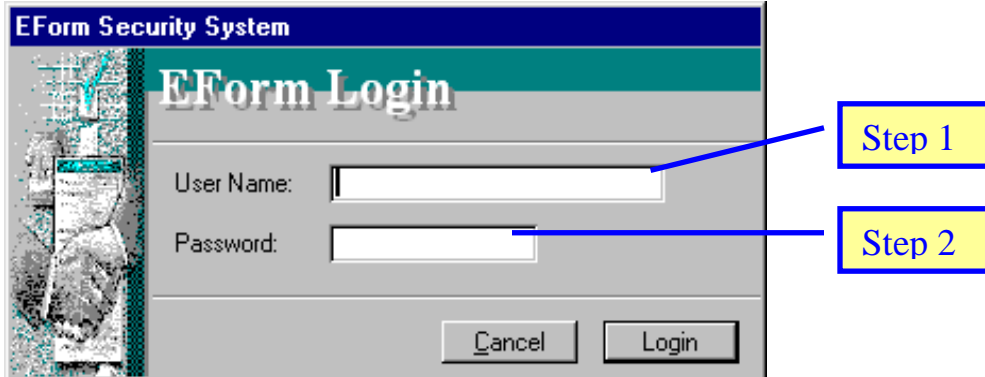


- Step 6** Click **Update Provider** Button
- Step 7** Repeat steps 1 - 5 above for each provider you add.
- Step 8** Click **Close**.

Login

Now that you have put in the necessary data to get started, you will be required to login.

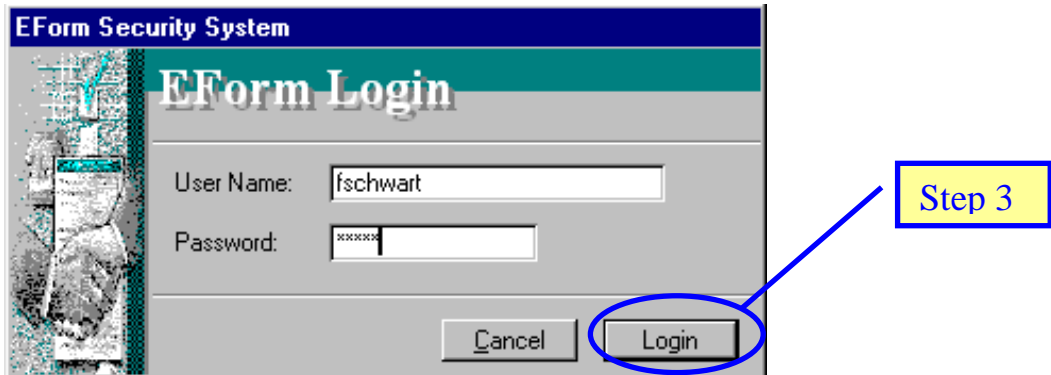
After closing the Administration Center, the following screen will come up:



The screenshot shows the 'EForm Login' window. The title bar reads 'EForm Security System'. The main heading is 'EForm Login'. There are two input fields: 'User Name:' and 'Password:'. Below the fields are 'Cancel' and 'Login' buttons. A blue arrow points from a yellow box labeled 'Step 1' to the User Name input field. Another blue arrow points from a yellow box labeled 'Step 2' to the Password input field.

Step 1 Type in your user name. (e.g. fschwart)

Step 2 Type in your password.



The screenshot shows the 'EForm Login' window. The title bar reads 'EForm Security System'. The main heading is 'EForm Login'. The 'User Name:' field contains 'fschwart' and the 'Password:' field contains 'xxxxxx'. Below the fields are 'Cancel' and 'Login' buttons. A blue circle highlights the 'Login' button, with a blue arrow pointing from a yellow box labeled 'Step 3' to it.

Step 3 Click **Login**.

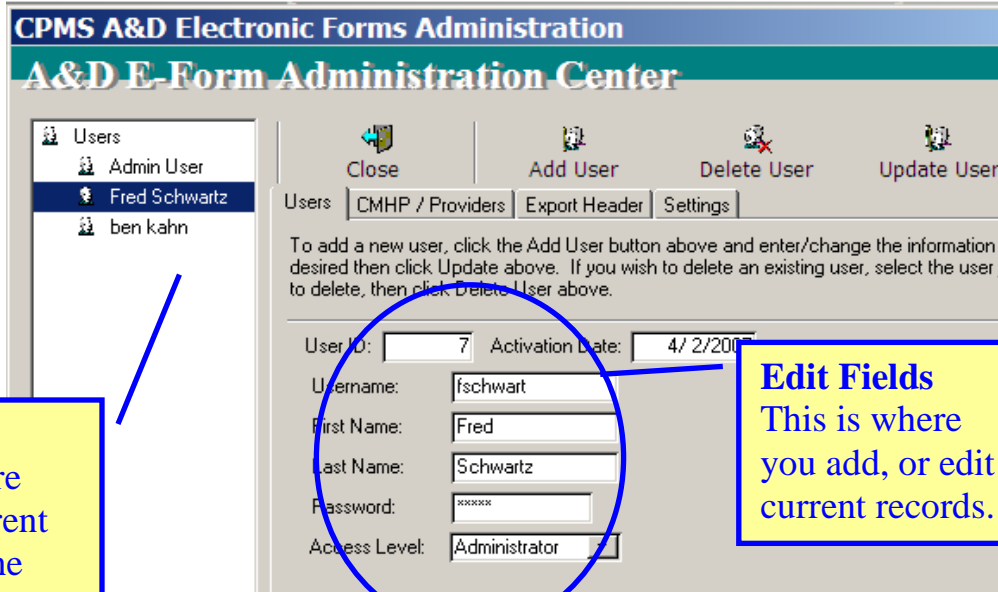
The Client center will open.



Before you are ready to enter client data, you must go to the **Admin Center** to verify everything was set up correctly.

Chapter 3 - Administration Center

This area requires administrative rights to gain access. This is the screen that allows you to add, edit, or delete users and providers; edit the Export header record; and migrate or merge data, and change settings.



Tree View
This is where you see current records in the Admin Center screens.

Edit Fields
This is where you add, or edit current records.

Users Tab

Add New Users

The screenshot shows the 'Users Tab' interface. On the left, there is a list of users: 'Admin User', 'Fred Schwartz', and 'ben kahn'. On the right, there is a form for adding a new user. The form includes fields for 'User ID', 'Activation Date', 'Username', 'First Name', 'Last Name', 'Password', and 'Access Level'. The 'Add User' button is highlighted. Blue arrows point from step labels to the following fields: Step 1 points to the 'Add User' button; Step 3 points to the 'Username' field; Step 4 points to the 'First Name' field; Step 5 points to the 'Last Name' field; and Step 6 points to the 'Password' field.

Note: Disregard the User ID, Activation Date and expiration Date boxes, these are automatically updated by the application.

- Step 1** Click **Add User** button, this will create a new record. Do the following steps below to change the entries from the new record to the correct data for your employee.
- Step 2** Hit your **tab** Key to move to Username field.
- Step 3** Enter User Name, up to 8 characters. (e.g. if the user name were Fred Schwartz, you would enter fschwart)
- Step 4** Enter the User's First Name. (e.g. Fred.)
- Step 5** Enter the User's Last Name. (e.g. Schwartz)
- Step 6** This will automatically default to "**password**" and can be changed by the user when they login for the first time.

Step 7 **Select the proper access level. You must have at least one administrator, we recommend a minimum of 2.** Most other users will be **employees.**

Step 8 Click **Update User** button. This will refresh the tree view with the Users name.

Step 9 Repeat steps 1 - 8 above for each user you add.

Step 10 Clicking the **Close** button will return you to the Client Center.

Edit Users

Step 1 Highlight the user you wish to edit by clicking their name in the Tree View.

Step 2 Highlight the field(s) you want to edit. (e.g. Jane Doe gets married and changes her name to Jane Roe, you would need to change the User Name field from jdoe to jroe and the Last Name field from Doe to Roe. You would also change the email address if that applies.)

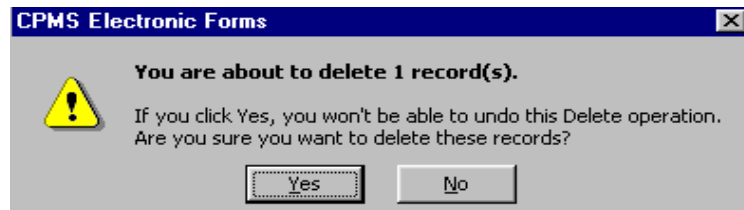
Step 3 Click **Update User** button.

Step 4 Clicking the **Close** button will return you to the Client Center.

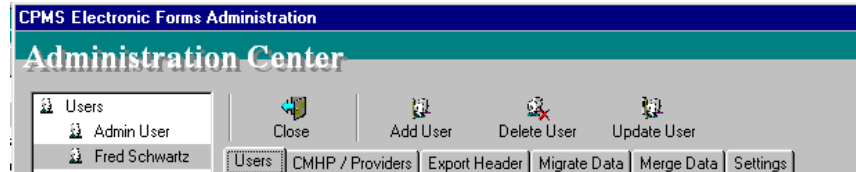
Delete Users

Step 1 Highlight the user you wish to Delete by clicking their name in the Tree View.

Step 2 Click **Delete User** button, you will get the following message:

**Step 3**

Click **Yes**.

**Step 4**

Clicking the **Close** button will return you to the Client Center.

CMHP/Provider Tab

Add New Provider

Tree View
This view lists each CMHP/ Provider Number in your program

Step 1
Update Fields
This is where you add/edit provider numbers.

List View
This view lists the CMHP/ Provider number and Program Title.

CMHP No.	Provider No.	Provider
01	200	Main Provider Residential Services
03	300	DUII Provider

Step 1 Click **Add Provider** button, this will create a new record. Do the following steps below to change the entries from the new record to the correct data for each Provider Number you use.

Step 3

Step 4

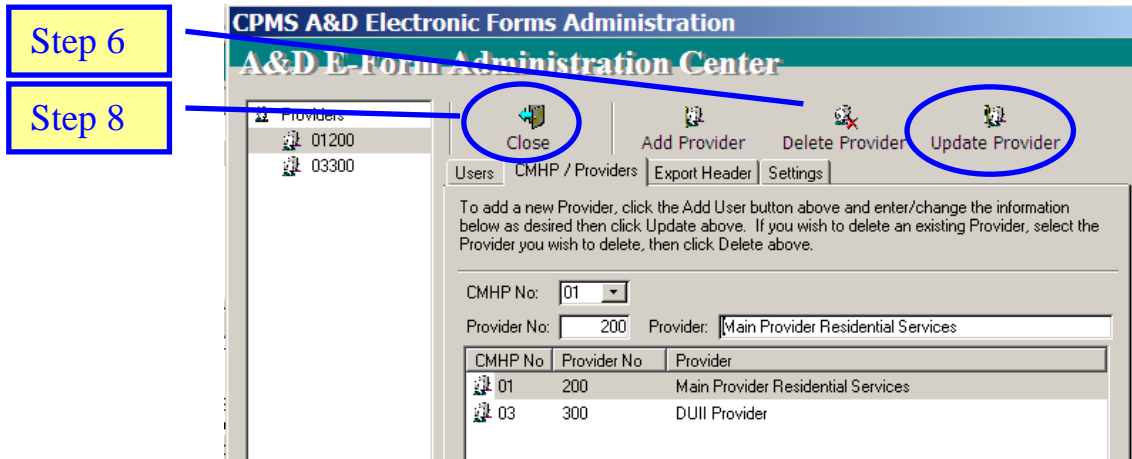
Step 5

Step 2 Enter CMHP Number, This is a Drop down list, just select the correct one. (e.g. 03)

Step 3 Hit your **tab** key to move to the CMHP No. field.

Step 4 Enter the Provider Number. (e.g. 001)

Step 5 Enter the Organization name. Please be descriptive. (e.g. Clackamas County Residential)

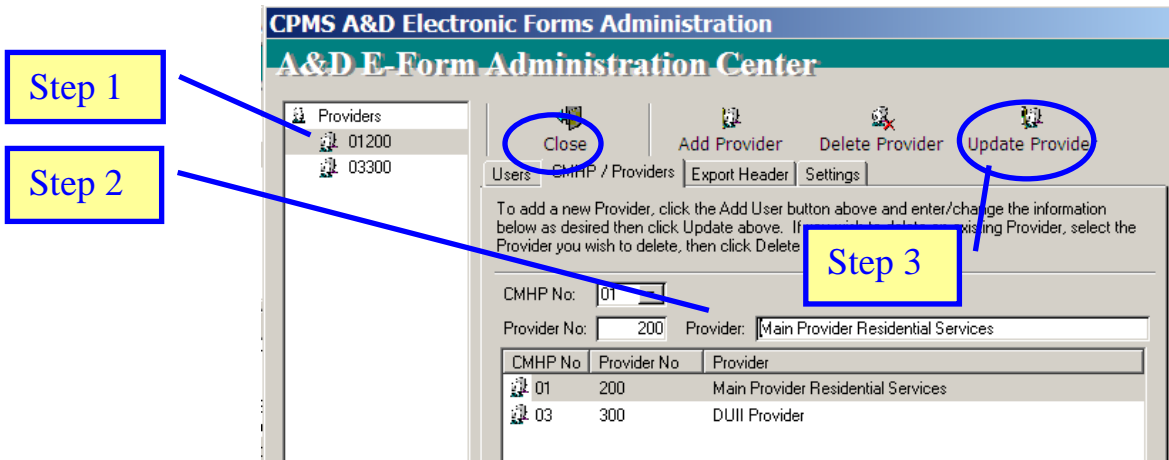


Step 6 Click **Update Provider** Button

Step 7 Repeat steps 1 - 6 above for each provider you add.

Step 8 Clicking the **Close** button will return you to the Client Center.

Edit Provider

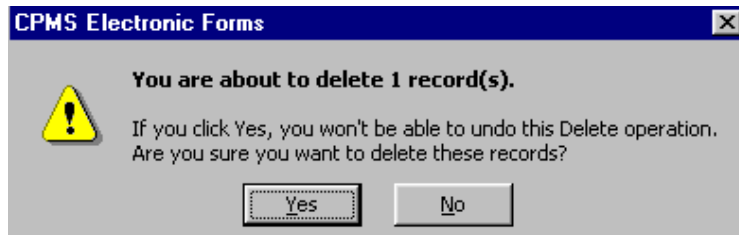


Step 1 Highlight the Provider you wish to edit by clicking the correct CMHP/Provider Number in the Tree View.

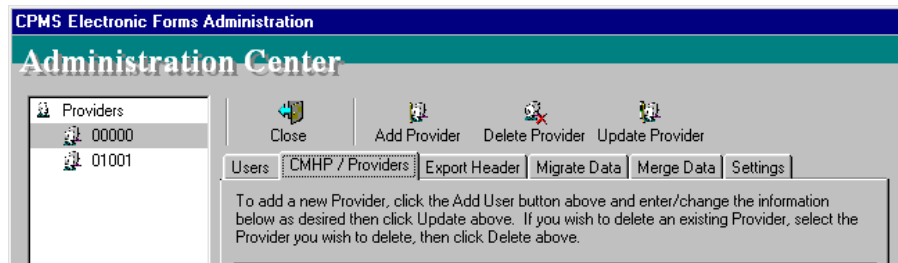
- Step 2** Highlight by clicking in the field(s) you want to edit.
- Step 3** Click **Update Provider** button.
- Step 4** Clicking the **Close** button will return you to the Client Center.

Delete Provider

- Step 1** Highlight the Provider you wish to Delete by clicking correct CMHP Provider Number in the Tree View.
- Step 2** Click **Delete Provider** button, you will get the following message:



- Step 3** Click Yes.



- Step 4** Clicking the **Close** button will return you to the Client Center.

Export Header Tab

Edit Export Header

You can edit any of the entries on this screen by double clicking to highlight the entry you wish to change. Type in the required changes, tab to next field or select another tab, changes on this screen are automatically saved.

Step 1 Edit the fields that need to be changed

Step 2 Clicking the **Close** button will return you to the Client Center.

Note: If the export header is missing, you will not be able to leave the **Export Header Tab** or close the **Administration Center**. Please make sure the export header is complete before leaving this tab.

Settings Tab

This tab is used to change the location of your data files and for debugging.

Tree View
This is where you select to change the location of the data files, or for debugging.

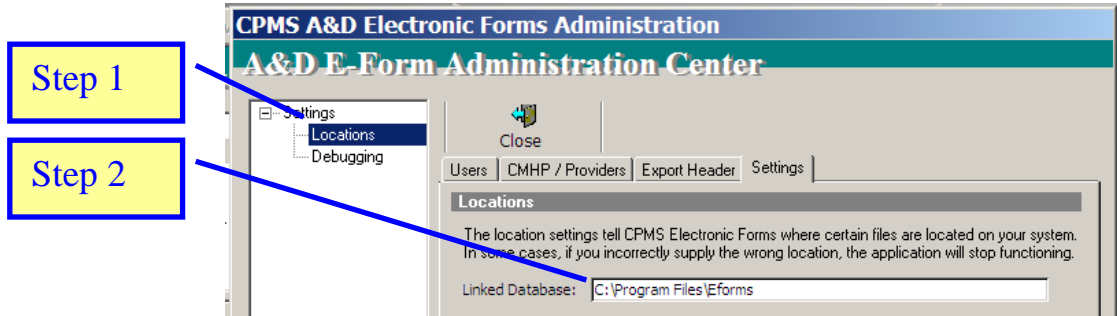
WARNING

These settings should only be changed by an advanced CPMS Electronic Forms administrator or by the direction of a MHAS system tech. Changing these settings could stop the application from functioning properly. Please, be sure you understand what each setting affects before making changes to any of these settings.

Note: Do not change these settings unless instructed to do so by an Addictions and Mental Health Services Technician.

Caution: You must put a copy of your data files in the new location **BEFORE** you change the path in this field! If you don't, your database will lock and you will not be able to get into it.

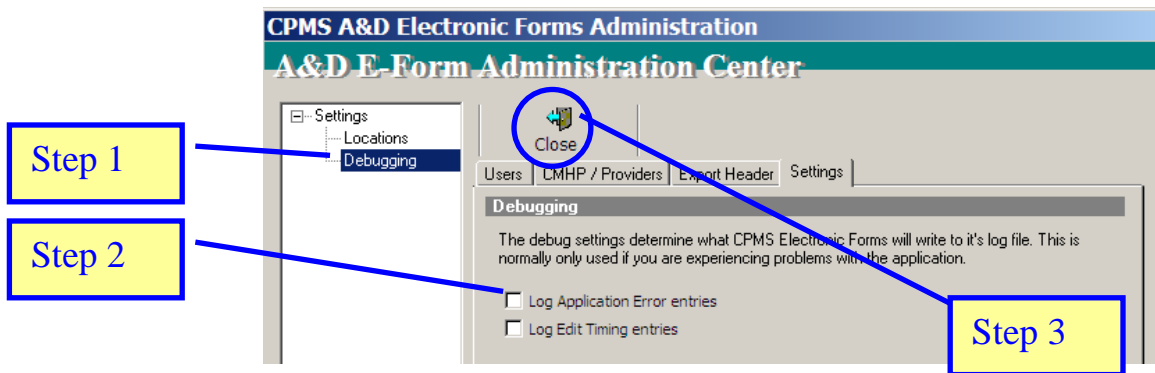
Location



Step 1 Click **Locations** in tree view.

Step 2 This is where you would change the location of your data files. We recommend you use the default setting.

Debugging

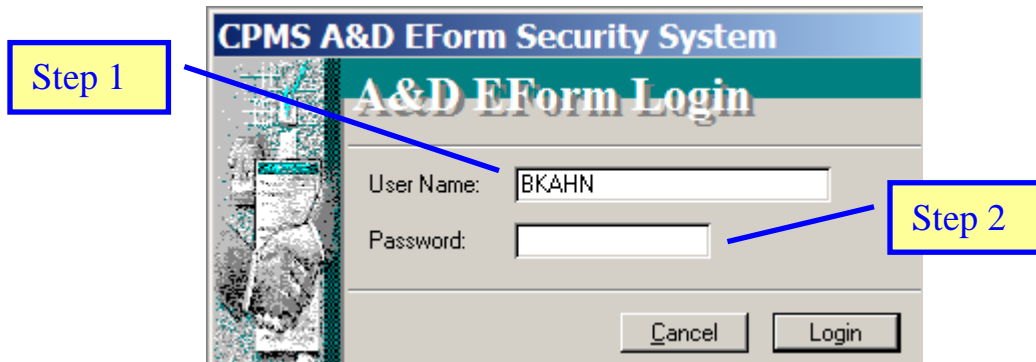


Step 1 Click **Debugging** in the tree view.

Step 2 This is where you would set the debug options, if the AMH Technician or Systems administrator asks you to change the settings.

Step 3 Clicking the **Close** button will return you to the Client Center.

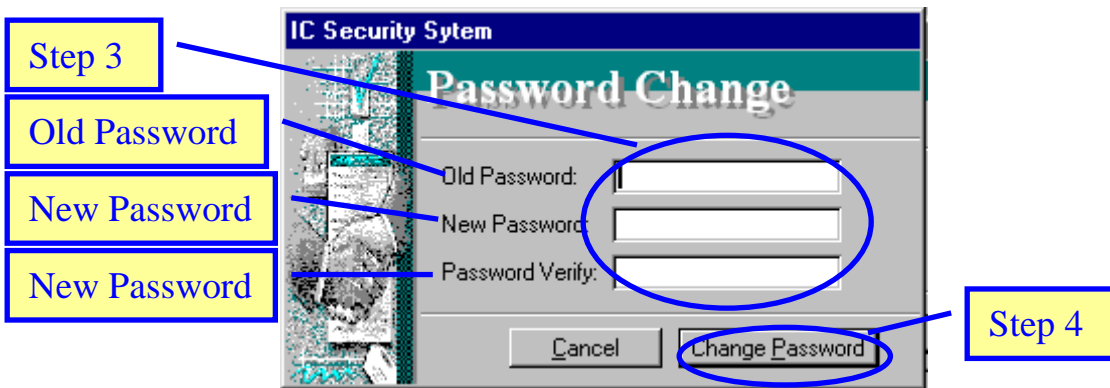
Chapter 4 - Application Login



Step 1 To login when you first start the application, type your user name and password.

Step 2 Click **Login**.

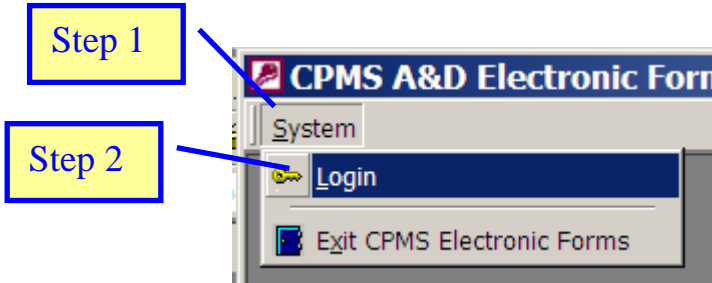
Note: If you have never logged in before, your password will be "**password**". When you log in using this default as your password the following screen will come up:



Step 3 Type **password** as your old password and then enter a new password of your choice. Enter your new password again.

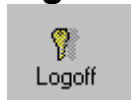
Step 4 Click **Change Password**.

To Login while the application is open, select **System** from the menu and click **Login** and follow steps 1 & 2 above.



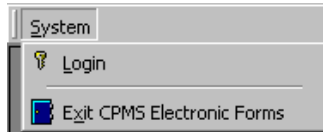
Logoff


To logoff without closing the application down, select **logoff** from the Client Center.



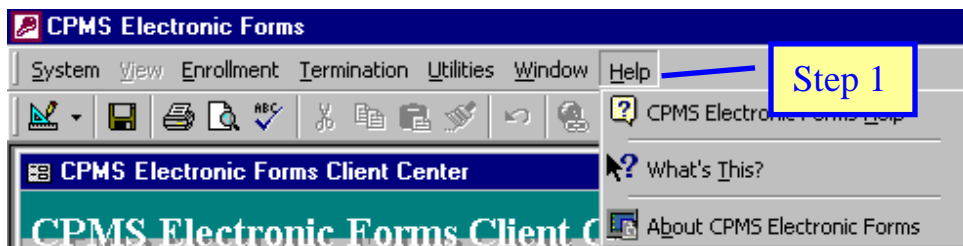
Exit Application

To Exit CPMS Eform, **Choose System** from the menu and click **Exit CPMS Electronic Forms**.



Or click the  in the upper right corner of the computer screen.

Identifying the Version



Step 1 Click Help on the Menu at the top of the screen.

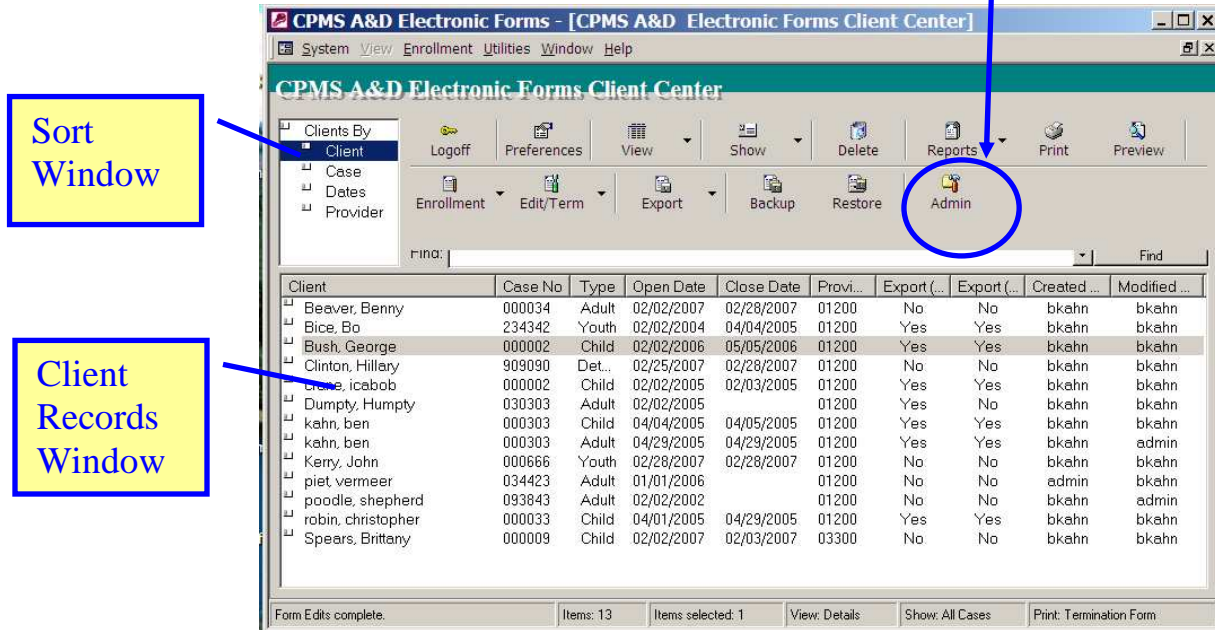
Step 2 Click **About CPMS Electronic Forms**.



Step 3 The version number is at the top right corner of the pop-up screen.

Chapter 5 - Client Center

The client center is where all client record actions are initiated. If you are an administrator your Client Center will have the Admin button visible.



If you log in as an employee you will not see the **Admin** or the **Delete** button option.

Sort Window

You can choose the way you sort your records in the client center, by clicking on client, case, dates or provider from the Sort Window.

Client Records Window

The way you see records in this window is determined by what you select in the **sort window**.

Sorted by Clients

Client	Case ...	Type	Open D...	Close D...	Provi...	Expo...	Expo...	Create...	Modified...
BROWN, CHARLES	053265	Yo...	03/02/20...		37048	Yes	No	Unknown	Unknown
CRICKET, JIM	040404	Yo...	02/10/20...	04/17/20...	29016	No	No	Unknown	Unknown

Sorted By Case

Case ...	Client	Type	Open D...	Close D...	Provi...	Expo...	Expo...	Create...	Modified...
0013...	ROMMA, ANTHONY	Detox/...	03/01/20...	03/07/20...	21014	No	No	Unknown	Unknown
0058...	SPEARS, BRITNEY	Youth	02/11/20...		20048	No	No	Unknown	Unknown

Sorted by Dates

Open Date	Close D...	Client	Case ...	Type	Provi...	Expo...	Expo...	Create...	Modified...
02/11/20...		SPEARS, BRITNEY	005812	Youth	20048	No	No	Unknown	Unknown
03/02/20...		BROWN, CHARLES	053265	Youth	37048	Yes	No	Unknown	Unknown

Sorted by Provider

Provi...	Client	Case ...	Type	Open D...	Close D...	Expo...	Expo...	Create...	Modified...
200...	SPEARS, BRITNEY	005812	Youth	02/11/20...		No	No	Unknown	Unknown
201...	GATES, WILLIAM	015762	Adult	03/06/20...		Yes	No	Unknown	Unknown

Deleting Client Records

CAUTION: When you delete records this way, the only way to restore those records is to do a complete restore, or retype the record(s). Please call AMH before doing a restore. *The delete function is only available to those with Administrator rights.*

You can delete single or multiple client records.

Step 1 Highlight by clicking the client record(s) you want to delete.

To highlight more than one record click on the first record, hold the shift key down, and click on the last record, this will highlight the first, last and all records in between.

To highlight records that are not contiguous, click the first record, hold down the ctrl key and click on each record you want to select while holding down the ctrl key.

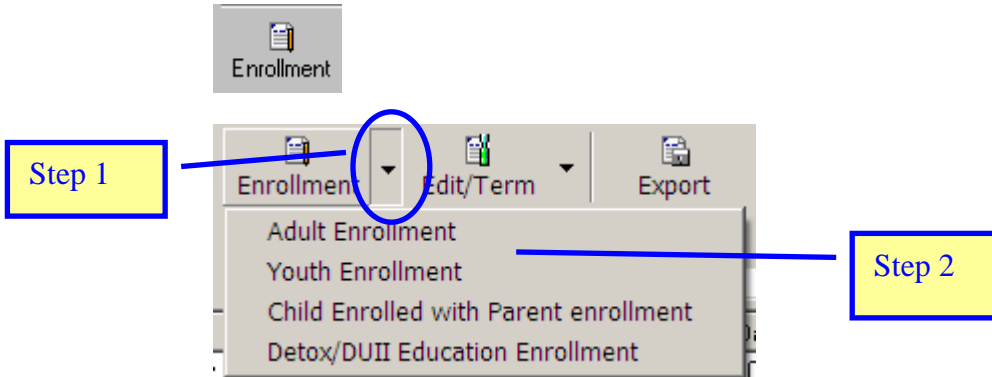
Step 2 Select **Delete** from the toolbar.



Enrollment

There are several ways to open enrollment forms. You can open forms from the toolbar or from the Menu at the top of the screen.

Click the Enrollment button to open the default form that is selected in User Preferences.



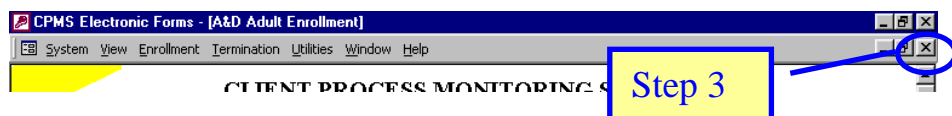
Step 1 To enroll a new client, select the dropdown arrow (▼) next to **Enrollment** on the toolbar, the Enrollment Menu will now appear.

Step 2 Choose the appropriate form for the client

In CPMS, there are four different forms: Adult (yellow), Youth (blue), Child enrolled with parent enrollment (light blue), or DUII Education/Detox (purple).

Once inside the chosen CPMS form, key in the information. Please refer to the **Using CPMS Manual** if you have questions regarding what goes in each box. As you enter the information, the **tab** key can be used to move you through the form, box by box.

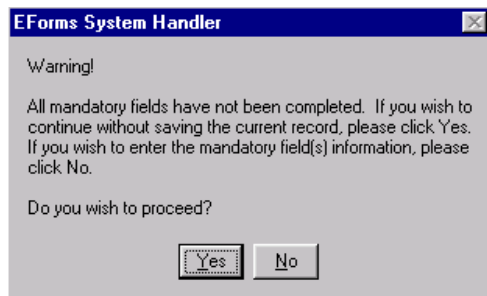
Step 3 When you are finished entering client information, close the form with the lower of the 2 X's in the upper right corner of the CPMS form or click on **Next Form** to fill out another form.



Note: If the mandatory fields (Boxes 3-8) are not filled out, you cannot save the form, the following warning message will appear.



If you choose to close the form anyway, you will have one more opportunity to change your mind when the following screen appears.

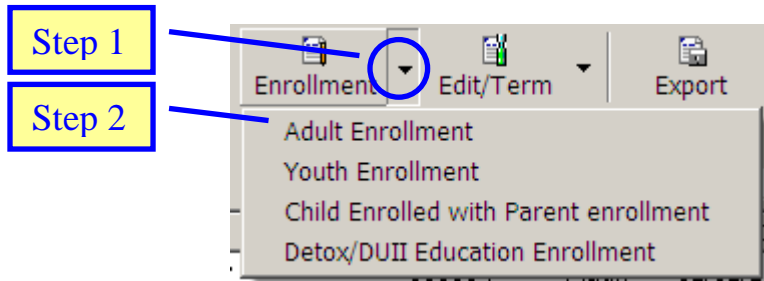


Be sure to finish filling out the entire form before moving on to a new form (incomplete boxes are blue and change color when filled out)



Note: If the form is not entirely filled out, it will not let you export (send the data to AMH) until it is complete.

Adult Enrollment

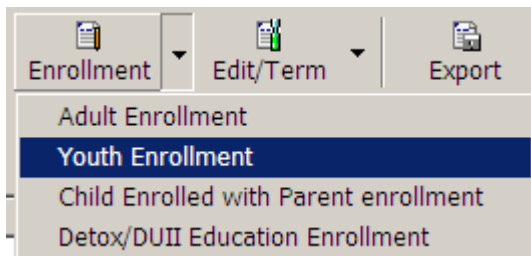


Step 1 To open a blank Adult Enrollment Form, click the down arrow (▼) next to the **enrollment** button.

Step 2 Select the Adult enrollment form.

CLIENT PROCESS MONITORING SYSTEM						ALCOHOL & DRUG ENROLLMENT FORM
State of Oregon CPMS AMH Department of Human Services			Current User Id: bkahn		ADULT TREATMENT	
				CLINIC IDENTIFICATION	5 OPENING DATE	
				3 CMHP	4 PROVIDER	
6 NAME (USE UPPER CASE BLOCK LETTERS)						
LAST	FIRST			BIRTH NAME		
7 CASE NUMBER		8 DATE OF BIRTH	10 ELIGIBILITY CODE		11 Program Area:	
					1-ALCOHOL 2-DRUG	
116. Level of Care Assessed	12 SEX	106 PRENATAL	107 INTERPRETER	13 EDUCATION	14 SCHOOL/TRAINING	15 Referral Source(s)
Enter the Level of Care for which the client was assessed.	F=Female M=Male	Client Pregnant at Enrollment?	Will interpreter services be needed for client?	Highest Grade Completed	Now Enrolled in School or Training?	Select First Appropriate Code(s) From Top of List.
17 ESTIMATED GROSS HOUSEHOLD MONTHLY INCOME			18 CLIENT PRIMARY RESIDENCE		115 Zip Code of Residence	
ENTER ACTUAL INCOME		0000=NO INCOME 0001=REFUSED	COUNTY OR STATE CODE		Enter Zip code of Residence or enter 00001 - Transient	
\$0000		9999=MORE THAN \$9999/MONTH				
19 RACE/ETHNICITY		20 HEALTH INSURANCE	21 MARITAL STATUS	22 LIVING ARRANGEMENT		
		Choose primary source		Enter First Appropriate Code:		

Youth Enrollment Form



Step 1 To open a blank Youth Enrollment Form, click the down arrow (▼) next to the **enrollment** button.

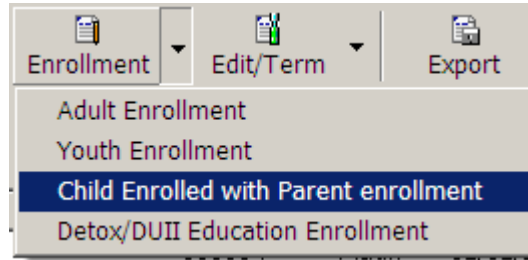
Step 2 Select the Youth enrollment form.

Detox/DUII Education

Step 1 To open a blank Detox/DUII Enrollment Form, click the down arrow (▼) next to the **enrollment** button.

Step 2 Select the Detox/DUII Education enrollment form.

Child Enrolled with Parent Enrollment



Step 1 To open a blank Child Enrolled with Parent Enrollment Form, click the down arrow (▼) next to the **enrollment** button.

Step 2 Select the Child Enrolled with Parent enrollment form.

0467 Child Enrolled with Parent Form

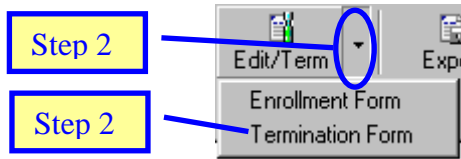
CLIENT PROCESS MONITORING SYSTEM					
State of Oregon CPMS AMH Department of Human Services			Current User ID bkahn		A - D ENROLLMENT FORM Child Enrolled with Parent
		CLINIC IDENTIFICATION		5 OPENING DATE	
		3 CMHP	4 PROVIDER		
6 NAME (USE UPPER CASE BLOCK LETTERS)				7 CASE NUMBER	
LAST		FIRST			
8. DATE OF BIRTH		10. ELIGIBILITY CODE		11 Program Area Assignment of Parent	
		50		1-ALCOHOL 2-DRUG	
12 SEX		19 RACE/ETHNICITY		105 Case # of Parent	
F=Female M=Male					

Termination

Terminating Clients Enrolled Electronically

Step 1	Client	Case ...	Type	Open Da...	Close D...	Provi...	Expo...	Expo...	Created...	Modified...
	BROWN, CHARLES	053265	Youth	03/02/20...		37048	Yes	No	Unknown	Unknown
	CRICKET, JIM	040404	Youth	02/10/20	04/17/20	29016	No	No	Unknown	admin

Step 1 To terminate a client who was enrolled electronically, highlight the name by clicking on the client's name.

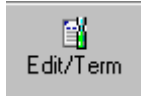



Step 2 Select the dropdown arrow (▼) next to **Edit/Term** from the toolbar.

Step 3 Select Termination Form. Some of the data will be pre-populated with the client information from the enrollment.

Edit Clients


The Edit/Term button on the Client Center tool bar can be set to default to either the Enrollment or Termination Form in the Preference form.




Step 1 

Client	Case ...	Type	Open Da...	Close D...	Provi...	Expo...	Expo...	Created...	Modified...
BROWN, CHARLES	053265	Youth	03/02/20...		37048	Yes	No	Unknown	Unknown
CRICKET, JIM	040404	Youth	02/10/20	04/17/20	29016	No	No	Unknown	admin

Step 1 To edit a client, Highlight by clicking on the client in the Client Center.

Step 2 

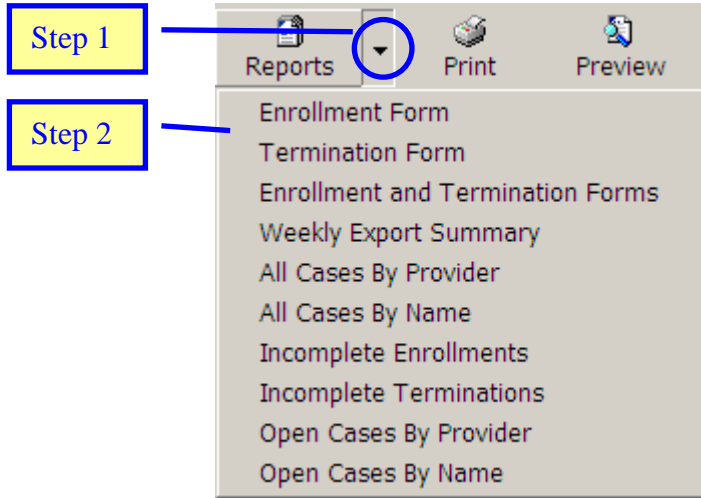
Step 3 

The screenshot shows the "Edit/Term" button with a dropdown arrow. A blue circle highlights the arrow. The dropdown menu is open, showing "Enrollment Form" and "Termination Form". Blue lines connect the yellow boxes to the arrow and the menu options.

Step 2 Click on the down arrow (▼) next to Edit/Term on the toolbar.

Step 3 Select Enrollment to complete or edit the enrollment form. Or select Termination to complete or edit the termination form.

Reports And Form Printing



Step 1 Click on the down arrow (▼) next to **Edit/Term** on the toolbar.

Step 2 Select report/form you want to print/preview.



Note: You can also double-click on the **Reports** button to toggle to the next form/report. You can choose one of the following reports.

Enrollment Form - This will allow you to print the enrollment form for the client(s) you have selected.

Termination Form - This will allow you to print the termination form for the client(s) you have selected.

Enrollment and Termination - This selection will cause both forms for any client(s) selected to be printed, depending on your choice.

Weekly Export Summary - This report shows a list of all forms, both enrollment and termination, that will be exported in the next export process. The report separates each type of form, showing all adult enrollments together, all adult terminations together, etc.

CPMS A&D EForms - Export Summary

Date of Export: 4/2/2007

Form Type	0467	Child Enrollment			
<u>Case Number</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Provider</u>	<u>Last Name</u>	<u>FirstName</u>
000009	2/2/2007	2/3/2007	03 300	Spears	Brittany
Total Child Enrollments		1			

Form Type	0433	Child Termination			
<u>Case Number</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Provider</u>	<u>Last Name</u>	<u>FirstName</u>
000009	2/2/2007	2/3/2007	03 300	Spears	Brittany
Total Child Terminations		1			

Incomplete Enrollments– Lists all clients whose Enrollment form is incomplete (boxes are left blank). Remember, incomplete forms will not be exported (sent) to AMH until they are completed. It’s a good idea to run this report before doing an export so that you can finish filling out the incomplete forms to ensure they are sent.

CPMS A&D EForms - Incomplete Enrollment Forms

The listed cases have enrollment forms that have missing information that will prevent them from being exported. Please complete these forms if you want them to be exported.

Form Type	0460	Adult Enrollment		
<u>Case Number</u>	<u>Open Date</u>	<u>Last Name</u>	<u>First Name</u>	<u>Entered By</u>
000034	2/2/2007	Beaver	Benny	bkahn
034423	1/1/2006	piet	vermeer	admin
093843	2/2/2002	poodle	shepherd	bkahn
Total Adult Enrollment	3			

Incomplete Terminations– This report lists all clients whose Terminations form is incomplete (boxes are left blank). Remember, incomplete forms will not be exported (sent) to AMH until they are completed. It’s a good idea to run this report before doing an export so that you can finish filling out the incomplete forms to ensure they are sent.

CPMS A&D EForms - Incomplete Termination Forms

The listed cases have termination forms that have missing information that will prevent them from being exported. Please complete these forms if you want them to be exported.

Form Type 0461 Adult Termination					
<u>Case Number</u>	<u>Open Date</u>	<u>Last Name</u>	<u>First Name</u>	<u>Enrollment E xported</u>	<u>Entered By</u>
034423	1/1/2006	piet	vermeer	No	admin
Total Adult Termination		1			

All Cases by Provider – This report list all clients that have ever been opened in your facility. It’s sorted by Provider Number.

CPMS A&D EForms - All Cases By Provider

CMHP 01 Baker			Provider 200 Main Provider Residential S	
<u>Case Number</u>	<u>Last Name</u>	<u>First Name</u>	<u>Open Date</u>	<u>Close Date</u>
000002	Bush	George	2/2/2006	5/5/2006
000002	crane	icabob	2/2/2005	2/3/2005
000033	robin	christopher	4/1/2005	4/29/2005
000034	Beaver	Benny	2/2/2007	2/28/2007
000303	kahn	ben	4/4/2005	4/5/2005
000303	kahn	ben	4/29/2005	4/29/2005
000666	Kerry	John	2/28/2007	2/28/2007
030303	Dumpty	Humpty	2/2/2005	
034423	piet	vermeer	1/1/2006	
093843	poodle	shepherd	2/2/2002	
234342	Bice	Bo	2/2/2004	4/4/2005
909090	Clinton	Hillary	2/25/2007	2/28/2007
Total Cases			12	

All Cases by Name – This report list all clients that have ever been opened in your facility. It’s sorted by Name.

CPMS A&D EForms - All Cases By Name

Last Name	First Name	Case	CMHP	Provider	Open Date	Close Date
Beaver	Benny	000034	01 Baker	200 Main Provider Residential Ser	2/2/2007	2/28/2007
Bice	Bo	234342	01 Baker	200 Main Provider Residential Ser	2/2/2004	4/4/2005
Bush	George	000002	01 Baker	200 Main Provider Residential Ser	2/2/2006	5/5/2006
Clinton	Hillary	909090	01 Baker	200 Main Provider Residential Ser	2/25/2007	2/28/2007
crane	icabob	000002	01 Baker	200 Main Provider Residential Ser	2/2/2005	2/3/2005
Dumpty	Humpty	030303	01 Baker	200 Main Provider Residential Ser	2/2/2005	
kahn	ben	000303	01 Baker	200 Main Provider Residential Ser	4/4/2005	4/5/2005
kahn	ben	000303	01 Baker	200 Main Provider Residential Ser	4/29/2005	4/29/2005
Kerry	John	000666	01 Baker	200 Main Provider Residential Ser	2/28/2007	2/28/2007
piet	vermeer	034423	01 Baker	200 Main Provider Residential Ser	1/1/2006	
poodle	shepherd	093843	01 Baker	200 Main Provider Residential Ser	2/2/2002	
robin	christopher	000033	01 Baker	200 Main Provider Residential Ser	4/1/2005	4/29/2005
Spears	Brittany	000009	03 Clackamas	300 DUll Provider	2/2/2007	2/3/2007

Total Cases 13

Open Cases by Provider – This report list only open clients in your facility. It’s sorted by Provider Number.

CPMS A&D EForms - All Open Cases By Provider

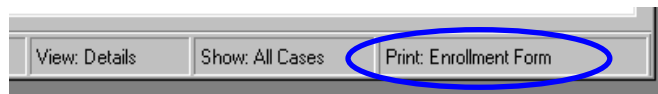
Open Date	Case Number	Last Name	First Name
2/2/2002	093843	poodle	shepherd
2/2/2005	030303	Dumpty	Humpty
1/1/2006	034423	piet	vermeer
Total Cases 3			

Open Cases by Name – This report list only open clients in your facility. It’s sorted by the client’s name.

CPMS A&D EForms - All Open Cases By Name

Last Name	First Name	Case	CMHP	Provider	Open Date	
Dumpty	Humpty	030303	01	Baker	200 Main Provider Residential Ser	2/2/2005
piet	vermeer	034423	01	Baker	200 Main Provider Residential Ser	1/1/2006
poodle	shepherd	093843	01	Baker	200 Main Provider Residential Ser	2/2/2002
Total Cases			3			

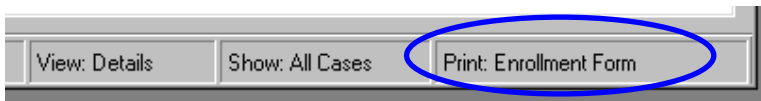
Note: The bottom right corner of the screen will always show what is currently selected to print.



Printing Individual Forms



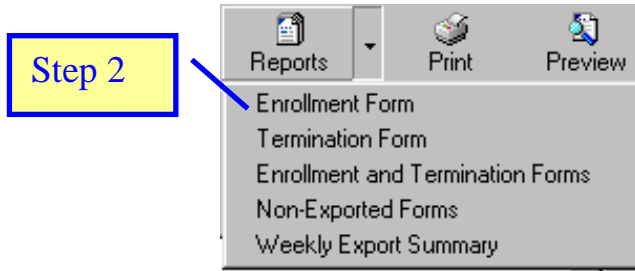
Note: The Print Button prints the report or form you have selected. The lower right corner of the Client Center will always show what will print.



Step 1

Client	Case ...	Type	Open Da...	Close D...	Provi...	Expo...	Expo...	Created...	Modified...
BROWN, CHARLES	053265	Youth	03/02/20...		37048	Yes	No	Unknown	Unknown
CRICKFT, JIM	040404	Youth	02/10/20	04/17/20	29016	No	No	Unknown	admin

Step 1 Select the client for which you want to print a form.

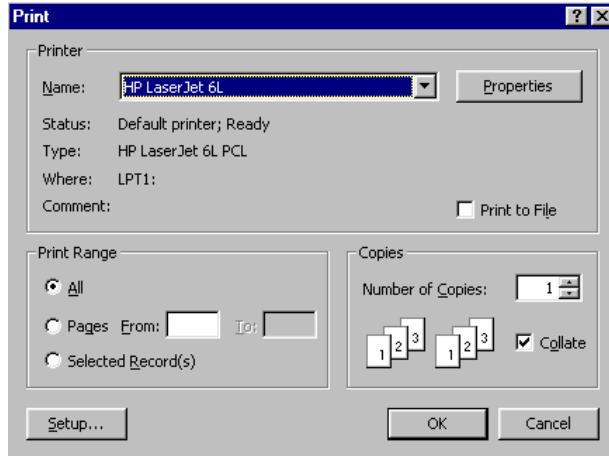


Step 2 Select form you want to print

Step 3 Click **Print** on the Tool Bar

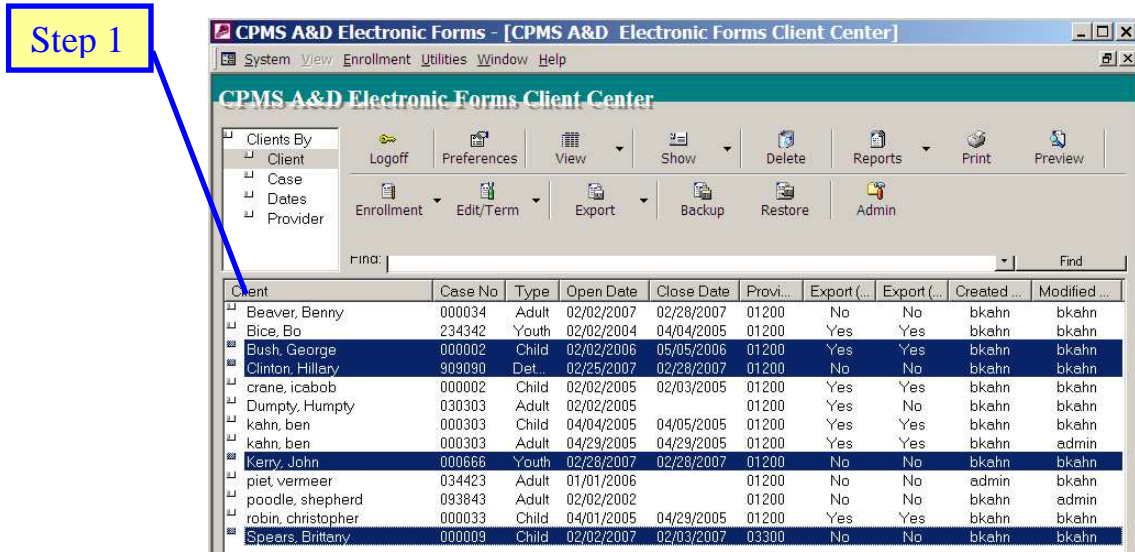


Another way of printing an individual form is by keying "**<Ctrl> P**", while you have a form opened. The following screen will appear and allow you to print the form you are currently looking at. (This will only print one form at a time.)

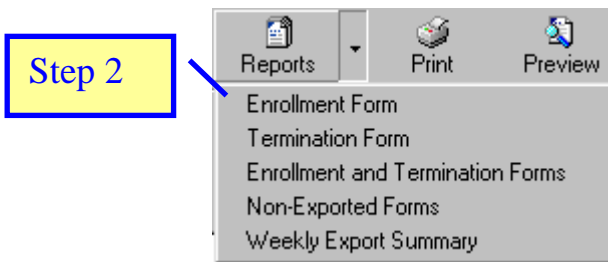


Remember to Click **OK**.

Printing Multiple Forms



Step 1 Select the clients you want to print a form for.



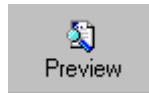
Step 2 Select form you want to print. **Enrollment** will print an enrollment form only for each client selected. **Termination** will print the termination form for each client selected (if a termination form is complete). **Enrollment and Termination** will print both the enrollment and termination forms for each selected client if the form is available.



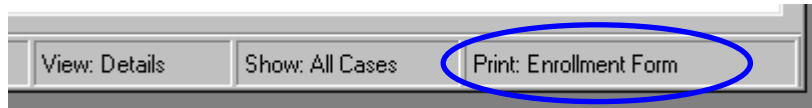
Step 3 Click **Print** on the Tool Bar

Preview

The preview button previews the report or form you have chosen with the **Reports** button on the Client Center.



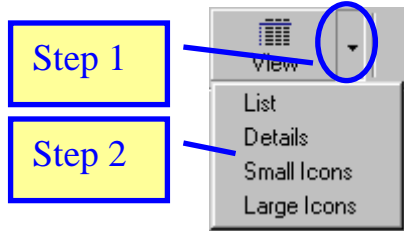
The preview button opens a preview of the report or form you have selected. The lower right corner of the Client Center will always show what will preview.



This works the same way print does. You can print individual open forms from the preview mode by keying <Ctrl> P while in the form.

View

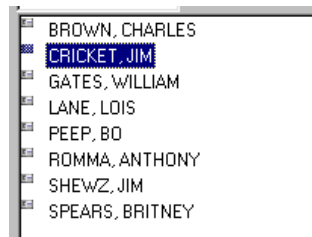
The Client Center view button lets you choose how you want to view your client records.



Step 1 To change the view, select the dropdown arrow (▼) next to **View** on the Toolbar

Step 2 Select **List**, **Details**, **Small** or **Large Icons**.

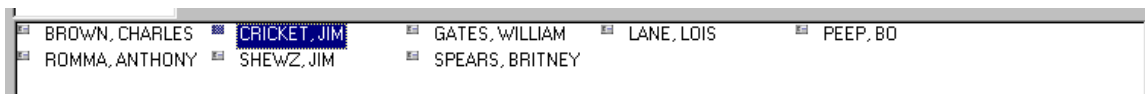
Records in List View



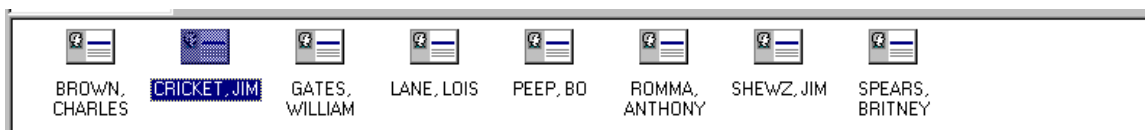
Records in Detail View

Client	Case ...	Type	Open Da...	Close D...	Provi...	Expo...	Expo...	Created...	Modified...
BROWN, CHARLES	053265	Youth	03/02/20...		37048	Yes	No	Unknown	Unknown
CRICKET, JIM	040404	Youth	02/10/20	04/17/20	29016	No	No	Unknown	admin

Records as Small Icons

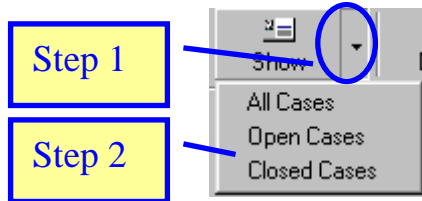


Records as Large Icons



Show

The Show button lets you choose if you want to show all client records, Open client records, or closed client records. You can select any of the choices without affecting the default setting.



Step 1 Set the Client Records Window to display **All Cases**, **Open Cases** or **Closed Cases**. To change the display, select the dropdown arrow (▼) next to **Show** on the Toolbar.

Step 2 Select **All Cases**, **Open Cases** or **Closed Cases**.

All Cases

Client	Case No	Type	Open Date	Close Date	Provider	Export (E)	Export (T)	Created By	Modified By
BROWN, CHARLES	053265	Youth	03/02/2000		37048	Yes	No	Unknown	Unknown
CRICKET, JIM	040404	Youth	02/10/2000	04/17/2000	29016	No	No	Unknown	Unknown
GATES, WILLIAM	015762	Adult	03/06/2000	12/22/2001	20194	Yes	Yes	Unknown	admin
LANE, LOIS	104114	Deto...	02/17/1999	04/15/1999	29014	Yes	No	Unknown	Unknown
PEEP, BO	046710	Youth	06/17/1999	06/17/1999	29017	No	Yes	Unknown	Unknown
ROMMA, ANTHONY	001339	Deto...	03/01/2000	03/07/2000	21014	No	No	Unknown	Unknown
SHEWZ, JIM	015692	Adult	03/03/2000		37100	No	No	Unknown	Unknown
SPEARS, BRITNEY	005812	Youth	02/11/2000		20048	No	No	Unknown	Unknown

Open Cases

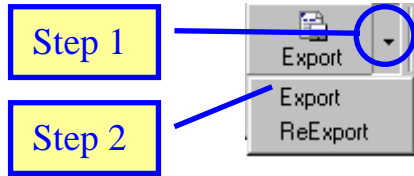
Client	Case No	Type	Open Date	Close Date	Provider	Export (E)	Export (T)	Created By	Modified By
BROWN, CHARLES	053265	Youth	03/02/2000		37048	Yes	No	Unknown	Unknown
SHEWZ, JIM	015692	Adult	03/03/2000		37100	No	No	Unknown	Unknown
SPEARS, BRITNEY	005812	Youth	02/11/2000		20048	No	No	Unknown	Unknown

Closed Cases

Client	Case No	Type	Open Date	Close Date	Provider	Export (E)	Export (T)	Created By	Modified By
CRICKET, JIM	040404	Youth	02/10/2000	04/17/2000	29016	No	No	Unknown	Unknown
GATES, WILLIAM	015762	Adult	03/06/2000	12/22/2001	20194	Yes	Yes	Unknown	admin
LANE, LOIS	104114	Deto...	02/17/1999	04/15/1999	29014	Yes	No	Unknown	Unknown
PEEP, BO	046710	Youth	06/17/1999	06/17/1999	29017	No	Yes	Unknown	Unknown
ROMMA, ANTHONY	001339	Deto...	03/01/2000	03/07/2000	21014	No	No	Unknown	Unknown

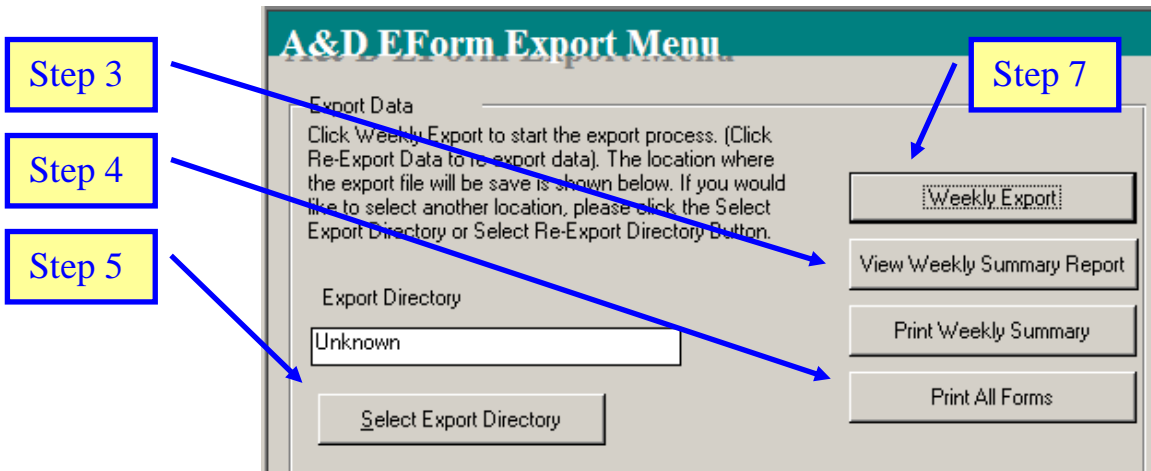
Export

Once a week you need to send the data (the electronic forms) to AMH. Export will allow you to do your weekly export, print out all forms that were exported, and print a weekly summary report for your records.



Step 1 From the Client Center, select the dropdown arrow (▼) next to **Export**.

Step 2 Select Export.



Step 3 You can preview what you are about to export by clicking on **View Weekly Summary Report**. This report tells you what is about to be exported to AMH. Be sure to print this out to verify that you are sending the correct information. While the report is open, you can key "<ctrl> P" to print the report.

Step 4 Click on the **Print All Forms** box if you want to print a copy of all exported forms.

Step 5 Select the Drive you want your export file to be sent to by clicking on Select Export Directory.

Step 6 Insert a disk into A: Drive if you are sending your export files to A.

Step 7 Click **Weekly Export**.

You should get the following message when Export is complete.

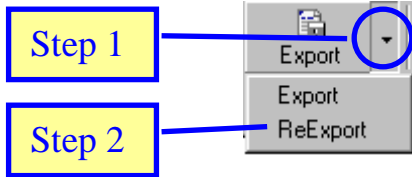


Step 8 Click OK. You will automatically return to the Client Center.

Step 9 Send the file to: CPMS OASIS
500 Summer Street NE E86
Salem, OR 97301-1118
E-mail: cpms.oasis@state.or.us

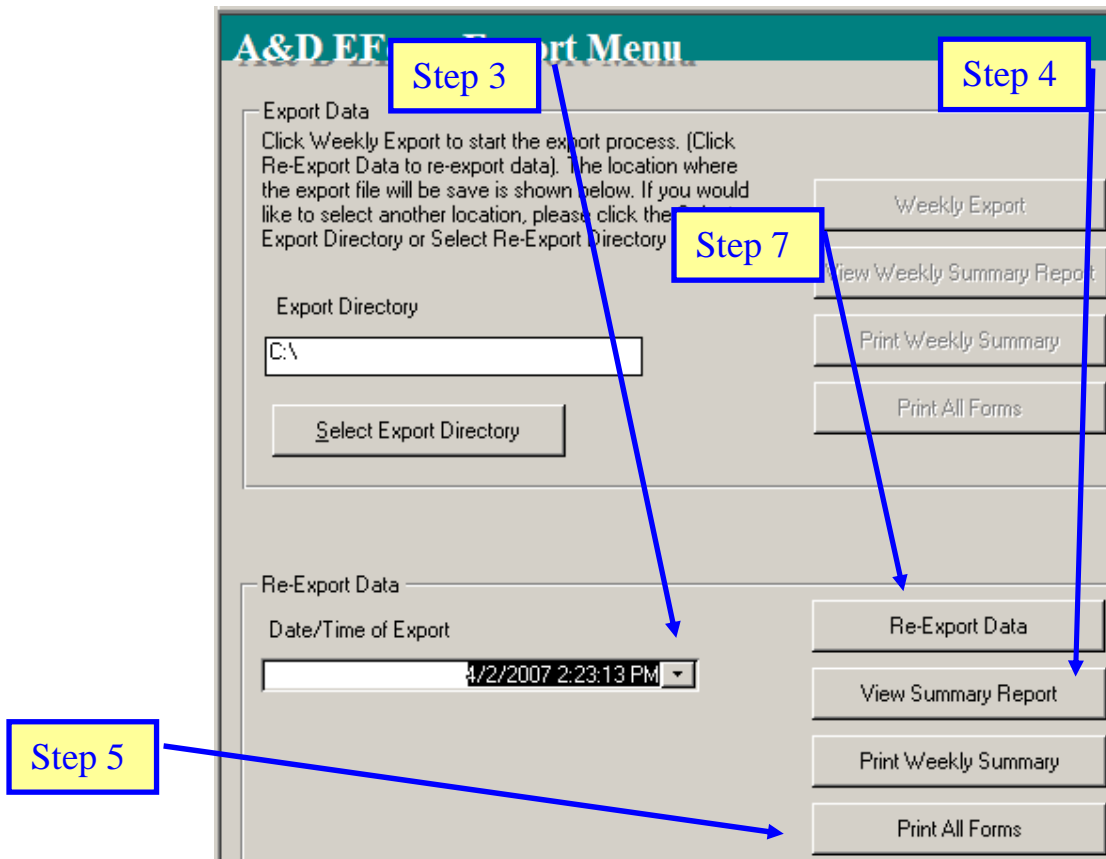
Re-Export

Occasionally, an exported file may not reach AMH, when this occurs you may need to do a re-export. **CALL AMH BEFORE RE-EXPORTING** so they can determine if re-exporting is required!



Step 1 From the Client Center, select the dropdown arrow (▼) next to **Export**.

Step 2 Select Re-Export.



Step 3 Choose the **date/time** to re-export (All exports show the Date and time of the original export).

Step 4 You can view what you've exported by clicking on the **View Summary Report**, in the Re-export Data Section. This report tells you what you're re-exporting to AMH. Please be sure to print this out and use it to verify that you are indeed sending the correct information to AMH. While the report is open, you can hold down the "<ctrl> key & the letter P" to print the report.

Step 5 Click on the **Print All Forms** box if you want to print a copy of re-exported forms.

Step 6 Insert a disk into A: Drive if you are sending your re-export files to A.

Step 7 Click **Re-Export Data**.

You should get the following message when Export is complete.



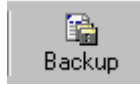
Step 8 Click OK. You will automatically return to the Client Center.

Step 9 Send the file to: CPMS OASIS
500 Summer Street NE E86
Salem, OR 97301-1118
E-mail: cpms.oasis@state.or.us

Backup

The Backup button allows you to backup your database on a regular basis to protect against data loss.

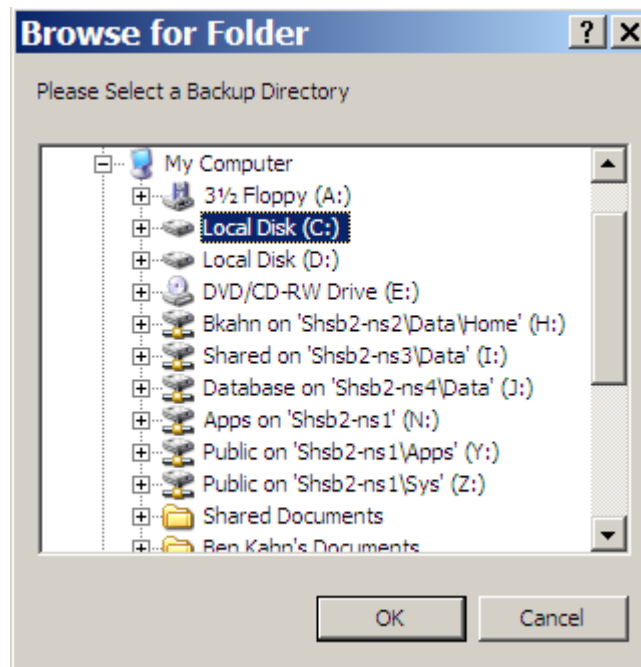
Backup will allow you to backup your database to a diskette.



Step 1 Click **Backup** from the Client Center. You should get the following message:

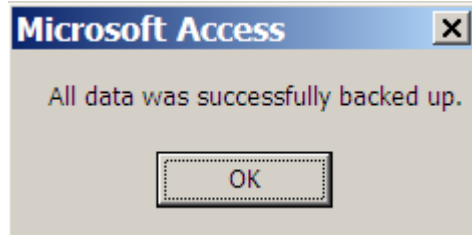


Step 2 Click on Backup again to select the Backup Directory.



Step 3 Choose the backup directory (folder) and click **OK**.

Step 4 You should get the follow message:

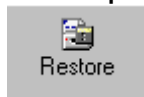


Click **OK**.

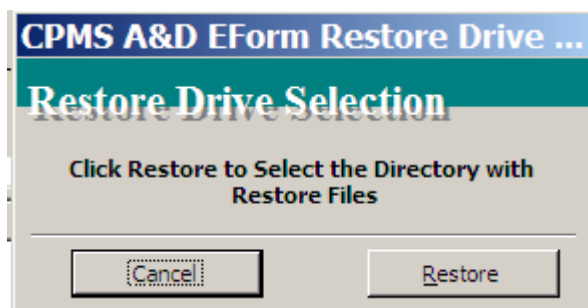
Restore

Caution: Restore will over-write all data in your database. Call AMH before doing a restore.

Restore will allow you to restore your database from a backup copy that is on a diskette, memory stick, etc.



Step 1 Click **Restore** from the Client Center. You should get the following message:



Step 2 Select the drive you want to restore from by clicking on **Restore** again. If you choose Floppy Drive, insert your disk in the A: drive.

Step 3 Chose the directory (folder) where the backup files are

located.

You will get the following message.



Step 4 Click **ok** and you will be returned to the Client Center.

User Preferences

Each user can set their preferences for how they want the Client Center to look when they login.

Client Center Defaults

Click the Preferences button on the client center toolbar to open the User Preferences Form and set default preferences.



Setting Sorting Default

Client By: Clients can be sorted by Client, Case, Dates or Provider. See Chapter 5 Client Center **Show** for more information.

Set View Defaults

View Button: The view can be set to default to List View, Details View, Small Icons, or Large Icons. See Chapter 5 - Client Center **View** for examples.

Set Default to Show Records

Show Button: The window can be set to default to show All cases, Open cases, or Closed cases. See Chapter 5 - Client Center **Show** for examples.

Set Default Report

Reports Button: Set default to Weekly Summary Report, Enrollment Form, Termination Form, Both Enrollment and Termination Forms, Incomplete Enrollments, Incomplete Terminations, Open Clients and All Clients. This default setting affects both the Print and Print Preview buttons on the Toolbar. See Chapter 5 - Client Center **Reports** for examples.

Set Default Enrollment Button

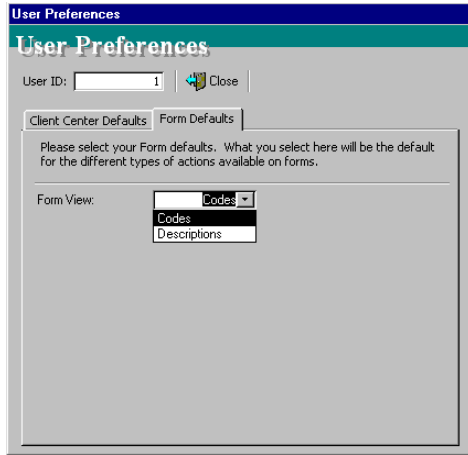
Enrollment Button: Select the appropriate form to use when enrolling a new client. This can be 0460 Adult, 0462 Youth, 0467 Child Enrolled With Adult or 0466 Detox/DUII Education.

Set Default Edit/Term Button

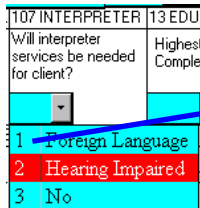
Edit/Term Button: Select the form you want this button to default to when you click on it. Selecting enrollment will open the appropriate enrollment form for the client you have highlighted. Selecting termination will open the appropriate termination form for the client you have highlighted.

Form Defaults

Set Form View Defaults

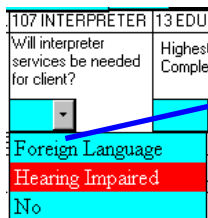


Form View: This can be set to Codes or Description entry. Both versions provide drop down lists for the boxes on the CPMS form.



Codes Entry shows both codes and description.

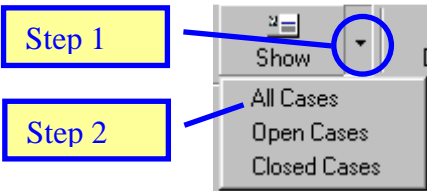
You can either select your entry or type your entry. The Codes version shows both codes and descriptions in the drop down but only allows you to input the codes. The Description version shows only the descriptions and no codes. Those new to CPMS may prefer the Description Version.



Description Entry shows description only.

Editing Existing Clients

Before you export (send) data to AMH, you may want to change or add data to a previously entered record. This is easily done.



Step 1 The first thing you need to do is determine if the client that you want to edit is an open client or a closed client. If you aren't sure, select the dropdown arrow (▼) next to **Show** on the toolbar.

Step 2 Select **All Cases**.

Step 3 From the CPMS Electronic Forms Client Center you can highlight the record you wish to edit by clicking on it.

CPMS A&D Electronic Forms Client Center

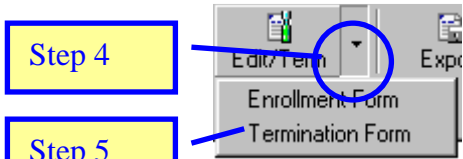
Logoff Preferences View Show Delete Reports Print Preview

Enrollment Edit/Term Export Backup Restore Admin

Find: Find

Client	Case No	Type	Open Date	Close Date	Provi...	Expor...	Expor...	Created ...	Modified ...
Beaver, Benny	000034	Adult	02/02/2007	02/28/2007	01200	No	No	bkahn	bkahn
Bice, Bo	234342	Youth	02/02/2004	04/04/2005	01200	Yes	Yes	bkahn	bkahn
Bush, George	000002	Child	02/02/2006	05/05/2006	01200	Yes	Yes	bkahn	bkahn
Clinton, Hillary	909090	Detox...	02/25/2007	02/28/2007	01200	Yes	Yes	bkahn	bkahn
crane, icabob	000002	Child	02/02/2005	02/03/2005	01200	Yes	Yes	bkahn	bkahn
Dumpty, Humpty	030303	Adult	02/02/2005		01200	Yes	No	bkahn	bkahn
kahn, ben	000303	Child	04/04/2005	04/05/2005	01200	Yes	Yes	bkahn	bkahn
kahn, ben	000303	Adult	04/29/2005	04/29/2005	01200	Yes	Yes	bkahn	admin
Kerry, John	000666	Youth	02/28/2007	02/28/2007	01200	Yes	Yes	bkahn	bkahn
piet, vermeer	034423	Adult	01/01/2006		01200	No	No	admin	bkahn
poodle, shepherd	093843	Adult	02/02/2002		01200	No	No	bkahn	admin
robin, christopher	000033	Child	04/01/2005	04/29/2005	01200	Yes	Yes	bkahn	bkahn

Step 3



Step 4 Select the dropdown arrow (▼) next to **Edit/Term** from the toolbar.

Step 5 Then choose the form you wish to correct, either **Enrollment** or **Termination**.

How to Correct Previously Submitted Data

Previously submitted data is information that has already been submitted to AMH. To correct previously submitted data please follow these steps:

- Step 1** Make a photocopy of the printed form in the clients' file.

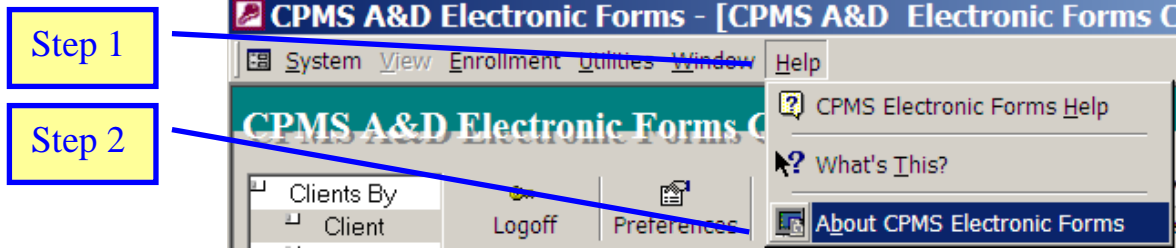
- Step 2** Make the corrections on both the original printed form and the copy of the printed form, in red ink. Be sure to check that it is a correction and date it.

- Step 3** Correct the information on the CPMS E-form electronic form also.

- Step 4** Send the copy of the printed corrected form to AMH.

Note: Corrections MUST be made and mailed on a paper copy. Corrections in the Eform Applications WILL NOT RE-EXPORT!

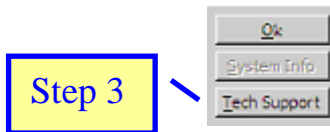
Technical Support



Step 1 Click **Help** on the menu.

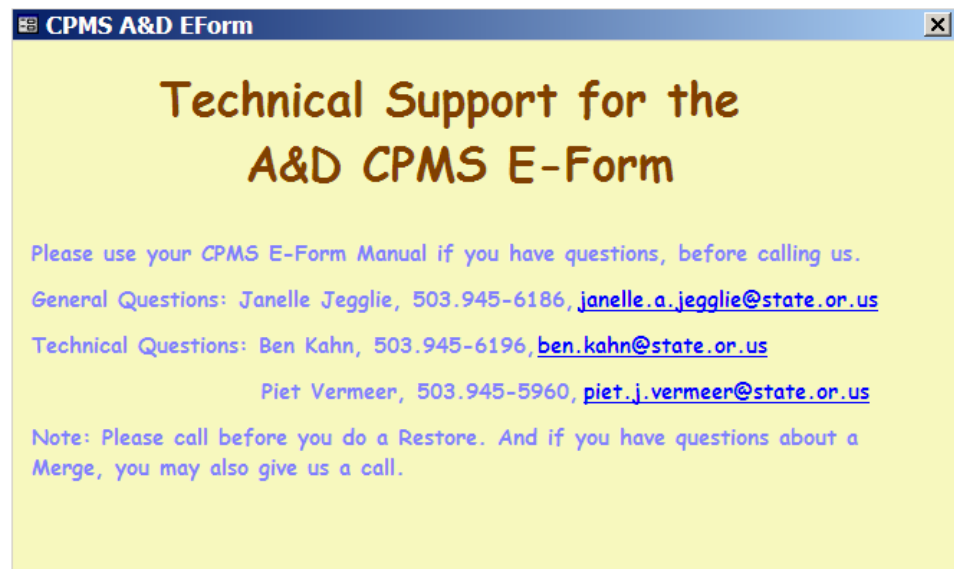
Step 2 Select **About CPMS Electronic Forms Help**.

The following form will open.



Step 3 Click **Tech Support**.

The following form will open.



Step 4 Click the **X** on the Technical Support Box to close the box. Then click **OK**.

Appendices

Frequently Asked Questions



Q: If we use the CPMS E-form, do we still need to keep a copy of the paper CPMS form in the client's file?

A: Yes, you still need to keep a copy of the CPMS form in the clients' file, but you can print a copy from the CPMS E-form application.

Q: There are some things that the CPMS E-form won't let me do, like change the route of administration at termination. Why?

A: The CPMS E-form has built-in edits that prohibit inaccurate responses. For a complete list, see page 80.

Q: How often do we send exported data to AMH?

A: AMH rules require that you send the data within seven days of enrollment. Most providers send the data once a week.

Q: How do we send the exported data to AMH?

A: You can send it to us on a diskette or by e-mail.

Q: What e-mail address do we use?

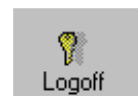
A: The address is cpms.oasis@state.or.us

Q: Is there a testing period, where I have to send the electronic file and the paper forms?

A: Yes, there is a testing period. After two successful submissions, you will no longer need to mail us paper forms. Just send AMH the electronic data. Please keep a copy of the form in the clients' file.

Q: How do I Logoff the CPMS E-form without shutting it down completely?

A: When you are back at the **Client Center**, just select the **Logoff** button from the toolbar.



Q: How do I shut down the CPMS E-form?

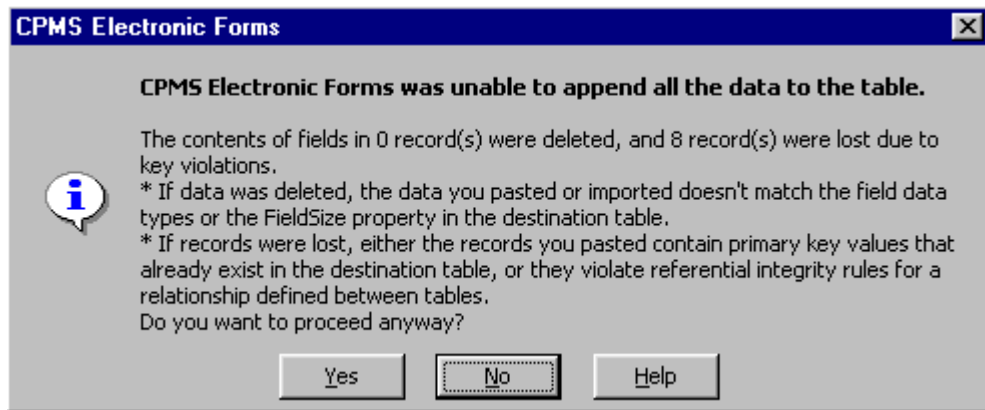
A: When you are back at the **Client Center**, just select the  button from the upper right corner of the application.

Troubleshooting

1. You can't see all of the Toolbar in the Client Center.

Try setting your video to 800 X 600 or higher resolution.

2. The following message has appeared during Restore function.



This can occur if you delete all or most of the records from your client center window, then do a backup. If you then try to do a restore, you will have export records that do not have matching client records.

We recommend you do not delete a large number of client records unless you have a backup of those records in a safe place. (Do not keep using the same disk or your backup file will be over-written).

It is not a good idea to delete large numbers of Client Records without contacting AMH first. Also, please contact AMH prior to doing a Restore.

Practice Labs

Lab 1 – Enroll client data

1. Enter at least 1 Adult Enrollment form using either the description or codes version.
 - a) Start at the **Client Center**
 - b) Choose **Enrollment ▼**
 - c) Choose **Adult enrollment**
 - d) Enter data from sample forms
 - e) When finished filling out a form, close the form and return to the Client Center.

2. Enter at least 1 Youth Enrollment form using either the description or codes version.
 - f) Start at the **Client Center**
 - g) Choose **Enrollment ▼**
 - h) Choose **Youth enrollment**
 - d) Enter data from sample forms
 - i) When finished filling out a form, close the form and return to the Client Center.

3. Enter at least 1 DUII/Detox form using either the description or codes version.
 - a) Start at the **Client Center**
 - b) Choose **Enrollment ▼**
 - c) Choose **DUII/Detox enrollment**
 - d) Enter data from sample forms
 - e) When finished filling out a form, close the form and return to the Client Center.

4. Enter at least 1 Child Enrolled with parent Enrollment form using either the description or codes version.
 - a) Start at the **Client Center**
 - b) Choose **Enrollment ▼**
 - c) Choose **Child enrolled with parent enrollment**
 - d) Enter data from sample forms
 - e) When finished filling out a form, close the form and return to the Client Center.

Lab 2 – Editing Data

(Use previously entered client data)

1. All clients require the following changes to their forms:
 - All clients have moved to Marion County
 - All clients must have an eligibility code
 - All clients have 5 DUUI arrests
 - All clients are covered by the Oregon Health Plan
 - Every client is now employed working full time
 - A few of your clients had additional children they forgot to mention during the assessment
 - A few of your clients refuse to give you their income

To make the above mentioned changes:

- a) Select the client listed on the lab form
 - b) Select **Edit/Term**
 - c) Click on **Enrollment Form**
 - d) Make changes on form
 - e) Close the form
 - f) Repeat steps (a) through (e) for each client you want to edit
2. (Optional) – Try changing additional areas of the form
 - Change drugs in the drug matrix
 - Change the date of birth
 - Estimate the date of birth
 - Change Source of Household Income
 - Change the opening date to 1950
 - Change the birth date to yesterday

Lab 3 – Terminate Clients

(Use previously entered client data)

1. Terminate all your Adult Clients
 - a) Choose the first client from your list
 - b) Select **Edit/Term**
 - c) Select **Termination Form.**
 - d) Fill out form (make up the termination information – Be creative!)
 - e) Close the form

2. Terminate all your Youth Clients
 - a) Select the client on your first lab form
 - b) Select Edit/Term
 - c) Select Termination Form.
 - d) Fill out form
 - e) Close the form

3. Terminate all your Child enrolled with Parent Clients
 - a) Select the client on your first lab form
 - b) Select **Edit/Term**
 - c) Select **Termination Form.**
 - d) Fill out form
 - e) Close the form

CPMS E-form Edits

These are edits that are part of the CPMS electronic submission process to prohibit inaccurate responses. Corresponding box numbers from the form are indicated in brackets ().

Enrollment Form Edits

- CMHP Number (3) and Provider Number (4) must be numeric, but can't be zeros.
- The Open Date (5) should be equal to or greater than the date of birth.
- If coded name (6) first, last or birth name is shorter than 3 letters, use spaces for the missing characters.
- Case number (7) is numeric only and must be six digits long. Use leading zeros when necessary. Case number can't be '000000'.
- Verify if the case number (7) is being used with a different name (6). If case is true, prompt user to the fact that they are duplicating a case number.
- When an individual does not know or refuses to divulge their date of birth, the provider may guess only the year of the client's date of birth. When date of birth code is marked Estimated (8), the system should default to 07-01 and enable the provider to enter only the year. Date of Birth must be less than or equal to the Open Date.
- DUll eligibility codes (10) are not allowed on form 462 (youth)
- Program Area (11) and primary addiction type (36) must match.
- If sex (12) is marked as Male, the Prenatal (106) field should automatically default to not applicable and become disabled.
- Prenatal (106) should be 1 or 2 only for females as indicated in sex (12).
- Clients' education level (13) must be less than or equal to 25 or 99 for unknown. Clients education (13) should be less than or equal to the clients age (box 5 minus box 8).
- If a DUll eligibility code is used (06, 26) in box 10 one of the referral codes (15) must be 21-Court or Evaluator.

- ❑ If Income (17) is '0000', Source of Income (24) should default to 'None'. If Income (17) is greater than 2, then Source of Income (24) should not allow 'None'.
- ❑ At least one dependent (23) should be indicated (default value) and it should correspond with the age of the client (box 5 minus box 8).
- ❑ There must be a primary Addiction Type (36). It can't be 00.
- ❑ Total Arrests (31) must be equal to or greater than DUIL arrests (32).
- ❑ Age at first use (40) must be less than or equal to admit age (5 & 8).
- ❑ Primary Addiction type (36) cannot be 23 Nicotine.
- ❑ If Secondary substance (36) is '00', then Tertiary Substance must be 00 in the drug matrix.
- ❑ If Secondary Substance (36) or Tertiary Substance (36) is '00' then all of the corresponding values in the drug matrix should be null.
- ❑ If there is a value in the Addiction type (36), corresponding values are required for all other boxes in the matrix below that drug.
- ❑ The default value should be "00" when no answer is provided for some fields like eligibility code (10), referral codes (15), Education (13), Income (17), Dependents (23), Total Arrests (31), DUIL Arrests (32), Methadone Prescribed (34), and secondary substance (36), tertiary substance (36) areas, Positive UA's (103), Total UA's (104).
- ❑ Zip Code of Residence (115) must be numeric, 5 digits.
- ❑ Level of Care Assessed (116) must be numeric, 2 digits, and not '00'.
- ❑ Level of Care at Admission (117) must be numeric, 2 digits.
- ❑ If Employment Status (25) is 1 Full Time or 2 Part Time, Employability Factor (33) should default to 0.

Termination Form Edits

- The following fields should be the same as the Enrollment Form: CMHP (3), Provider (4), Opening Date (5), Name (6), Case Number (7), Date of Birth (8), Addiction Type (63) and Route of Administration (66).
- CMHP Number (3) and Provider Number (4) must be numeric, but can't be zeros.
- The Open Date (5) should be equal to or greater than the date of birth and less than the Last Treatment Contact Date (49).
- If coded name (6) first, last or birth name is shorter than 3 letters, use spaces for the missing characters.
- Case number (7) is numeric only and must be six digits long. Use leading zeros when necessary. Case number can't be '000000'.
- Prenatal (108) should be 1 or 2 only for females as indicated in sex (12). Males should always be '3' not applicable.
- If Income (56) is '0000', Source of Income (58) should default to 'None'. If Income (56) is greater than 2, then Source of Income (58) should not allow 'None'.
- There must be a Primary Addiction Type (63). It can't be 00.
- Total Arrests (54) must be equal to or greater than DUII arrests (55) (and recent arrests).
- Primary Addiction type (63) cannot be 23 Nicotine.
- If Secondary substance (63) is '00', then Tertiary Substance must be 00 in the drug matrix.
- If Secondary Substance (63) or Tertiary Substance (63) is '00' then all of the corresponding values in the drug matrix should be null.
- If there is a value in the Addiction type (63), corresponding values are required for all other boxes in the matrix below that drug.
- The default value should be "00" when no answer is provided for some fields like referral codes (53), Education (51), Income (56), Total Arrests (54), DUII Arrests (55).
- If Income (56) is greater than 2, Source of Income (58) should not allow None to be indicated.

- ❑ If Employment Status (59) is 1 Full Time or 2 Part Time, Employability Factor (32) should default to 0.
- ❑ If Termination Type (48) is 03, *Treatment Complete*, frequency of use for the primary (36) problem must be 0 or 1.
- ❑ If a DUUI eligibility code is used (06, 26) in box 10, and Termination Type (48) is 05, Referred To (53) must be 21, *Court or Evaluator*.
- ❑ If Termination Type (48) is 03, *Treatment Complete*, there must be no unknowns (code 9 or 99) in any of the fields at termination.
- ❑ Last Treatment Contact Date (49) must be greater than the DOB (8), greater than or equal to the Opening Date (5), and less than or equal to the Form Completed Date (49).
- ❑ The Form Completed Date (50) should greater than the DOB (8), greater than or equal to the Opening Date (5), and greater than or equal to the Last Treatment Contact Date (49).
- ❑ Prenatal (106) should automatically default to 'Not Applicable for Males.
- ❑ Prenatal (106) must be yes (1) or No (2) for females.
- ❑ Education (51) at termination should be equal to or greater than education at enrollment. If education at enrollment is 99, education at termination can be anything between 00-25, 99. Education (51) at termination should be less than or equal to the client's age.
- ❑ If a DUUI eligibility code is used (06, 26) in box 10, and Termination Type (48) is 03 Completed Treatment, referred to (53) must not be 21 court or evaluator.
- ❑ Total Arrests (54) during treatment must be equal to or greater than DUUI Arrests (55) during treatment (and recent arrests).
- ❑ Pre-Delivery (109) must be 1, 2, 4, or 9 for females, and always 3 Not Applicable for Males.
- ❑ If Antabuse (68) is marked, alcohol must be one of the addiction types (63).
- ❑ Number of Drug and Alcohol Use Tests Administered (104) must be equal to or greater than Number of Positive Tests (103).
- ❑ If Martial Status (21) is 2, 3, 4, or 5 on enrollment form, then it can't be 1 on the termination form.

Other Form Edits

- Service Element must be 63 or 73 to utilize service volume days and hours (200) on form 0466.
- Service Element 68 can only utilize the service volume hours (200) on form 0466.

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AMH CPMS E-form Training Participant Evaluation Form

Location (city): _____

Please respond to the questions as honestly and completely as possible. Your assessment will be used to help improve our training and provide feedback to your trainers.

(Circle one)

POOR GOOD EXCELLENT

TRAINING CONTENT	1	2	3	4	5
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Materials, concepts and knowledge were relevant and comprehensive

TRAINER/PRESENTER ABILITY	1	2	3	4	5
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Trainers/presenters were organized, informative, and prepared.

APPLICATION TO PRACTICE	1	2	3	4	5
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The software and information presented will be easily implemented into my job duties.

TEACHING AIDS	1	2	3	4	5
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Training materials, handouts examples, and audio visual aids were helpful.

CLASS PARTICIPATION	1	2	3	4	5
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Discussion and feedback were appropriate and sufficient.

WHAT I STILL DON'T UNDERSTAND IS...

PLEASE SHARE YOUR COMMENTS