Client Process Monitoring System

Using the Mental Health CPMS E-form™

(Version 1.0.1)

(To Submit Data Electronically)

Developed by

Addictions and Mental Health Services

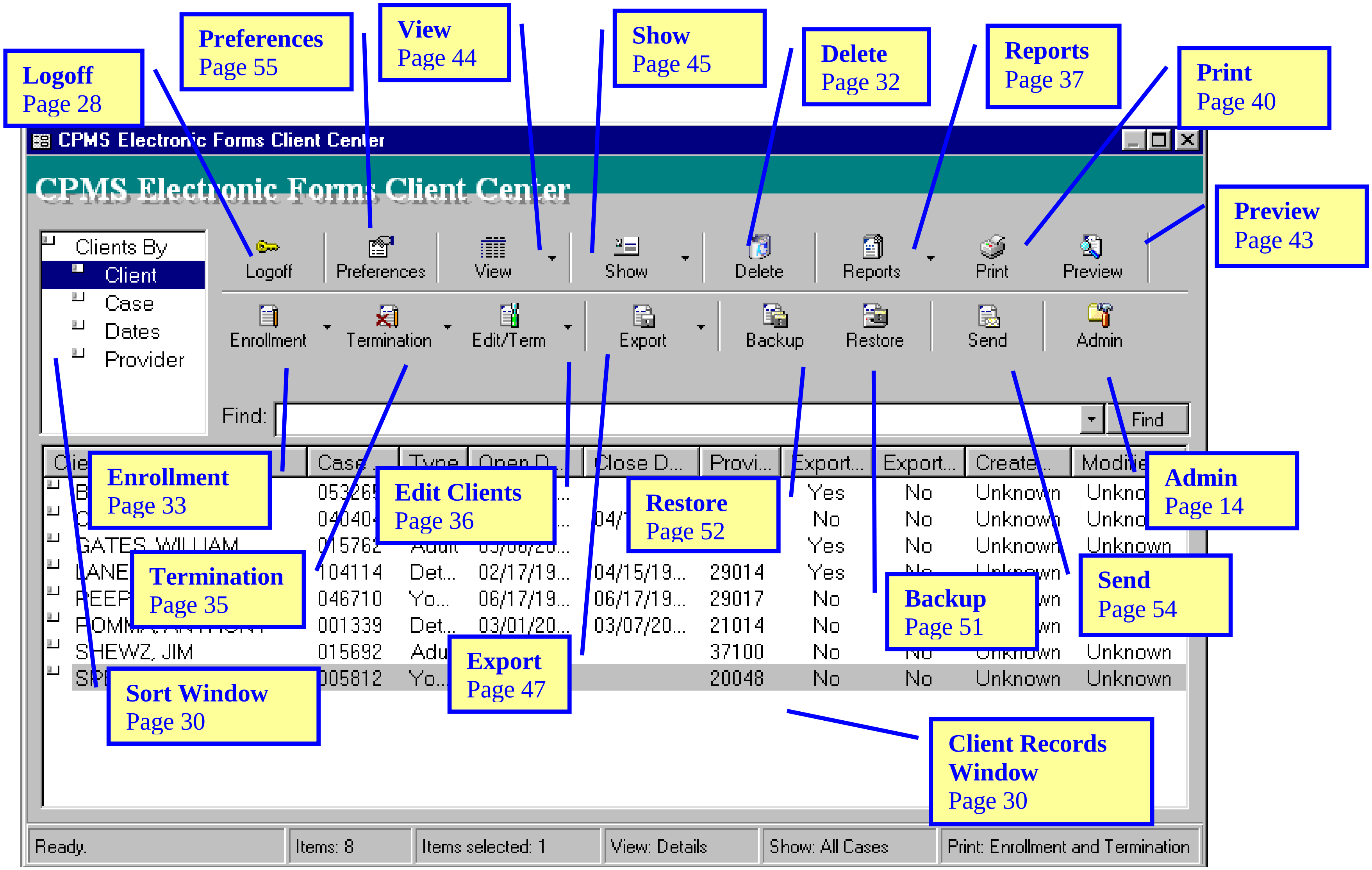
Office of Information Services

Department of Human Services

State of Oregon

May 2009

Visual Table of Contents



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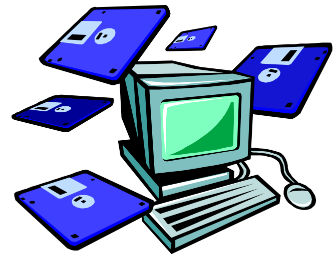
Chapter 1 - Getting Started



Installation
Software & Hardware Requirements

Software requirements:

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

Hardware requirements:

Component	Description
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
Software	Microsoft Access 2000 or higher[1]
Video monitor	EGA (or higher)
	The recommended video setting is 800 x 600 or higher
CD-ROM drive	Required
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.

[1] If you don't have MS Access 2000, a free runtime version will also work. Contact a member of the CPMS Eform Technical Support Team for more information.

Installing the Mental Health CPMS E-form Version 1.0.1

Please follow these instructions. OMHAS data team staff are available to help you walk through these instructions if necessary. Just give us a call, 503-945-5763 (ask for a CPMS E-Form Technical Support team member).

Step 1 Run the MH CPMS E-form (.exe) It will take a few minutes but 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.

Now go to Chapter 2 in the CPMS E-form manual to continue the first time setup procedure. If you run into a problem, please give us a call.

Installing on a Network: Please call an OMHAS Eform Technical Support Team Member for instructions.

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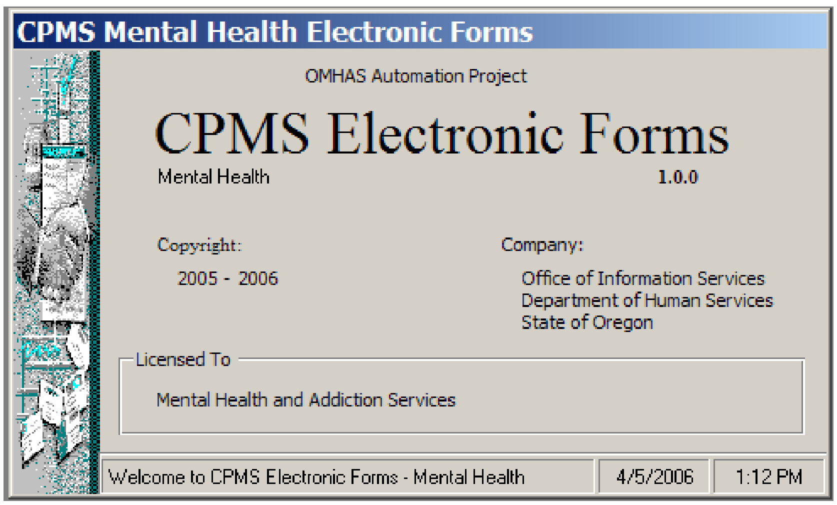
Chapter 2 - Starting the Mental Health CPMS Eform

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 Mental Health CPMS E-form by Double Clicking on the Icon on your Desktop.

Opening Screen

The first screen you will see is the Welcome Screen.

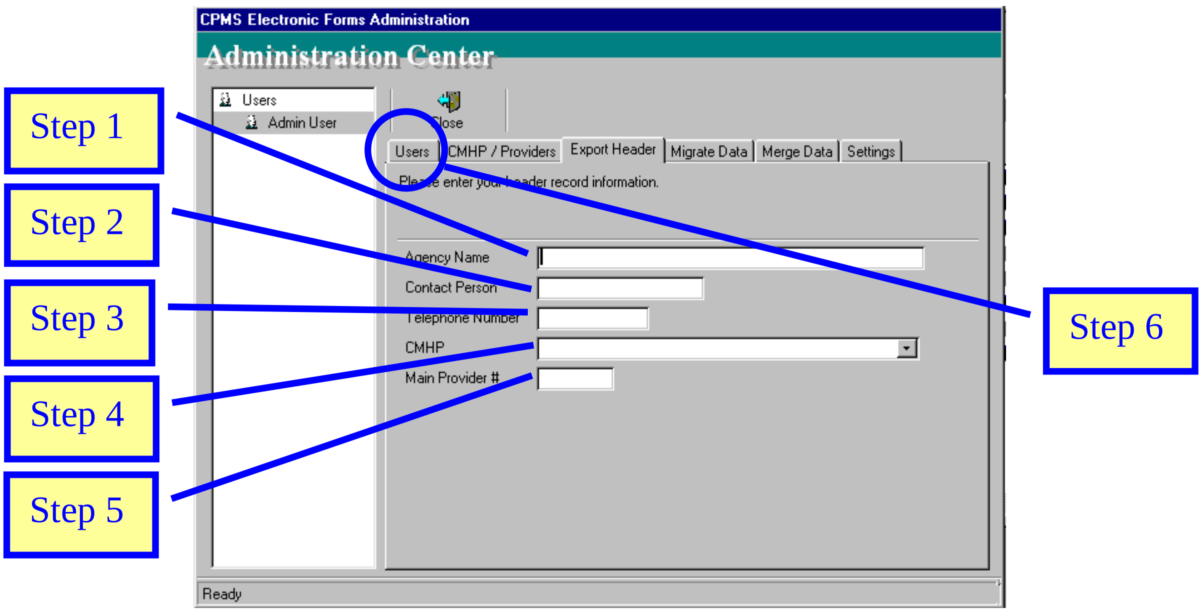


First time using Eform

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 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 OMHAS 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)

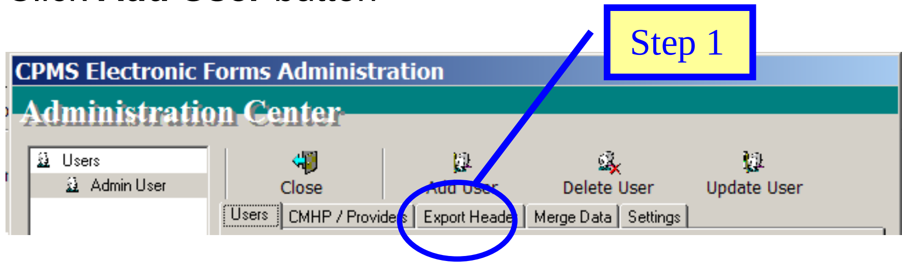
Step 5 Enter Main Provider # (e.g. 001)

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 tab, changes on this screen are automatically saved.

Step 6 Select the **User Tab.**

Add Yourself As User

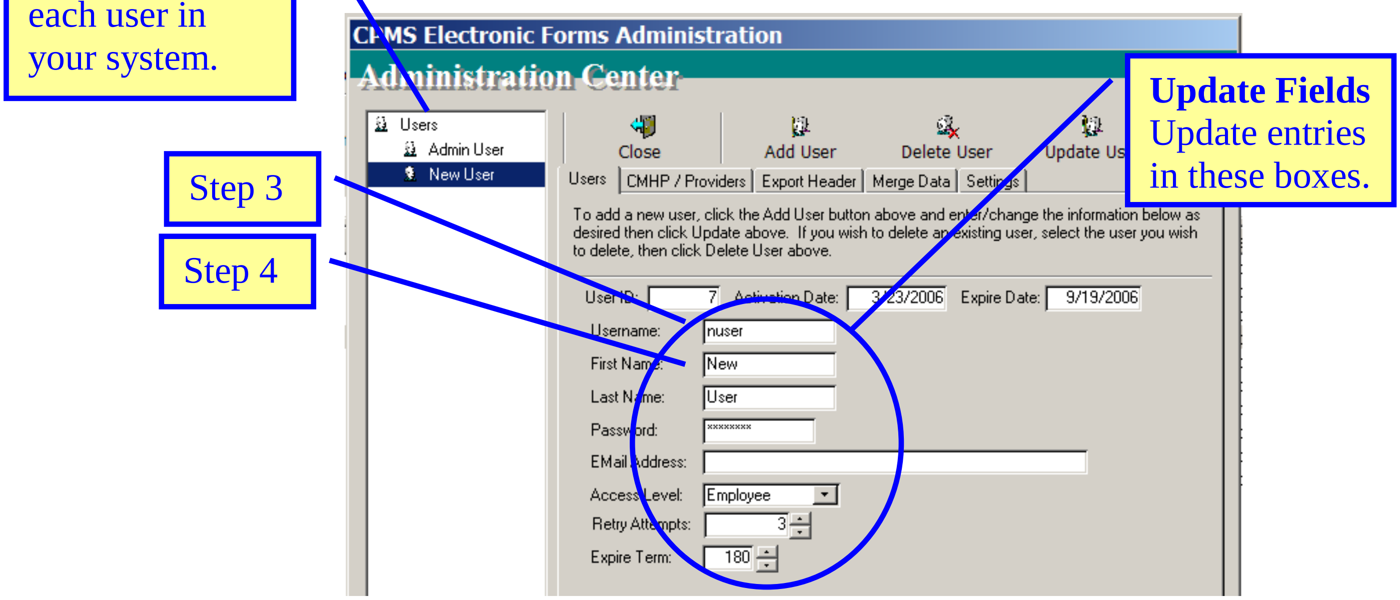
Step 1 Click **Add User** button



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

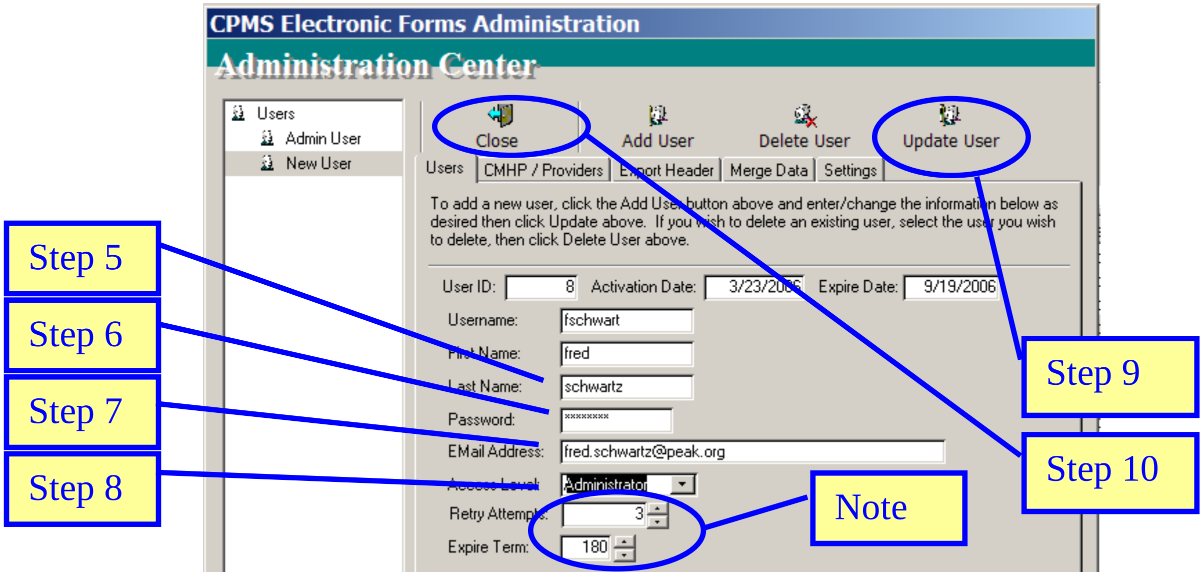
Step 2 Hit your **Tab** key to move to Username.

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



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

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



Step 5 Enter your Last Name. (e.g. Schwartz)

Step 6 Enter your choice of a password between 5 and 8 characters.

Step 7 Enter your email address. (e.g. fred.schwartz@peak.org)

Step 8 **Select Administrator for your access level.** Most other users will be employees.

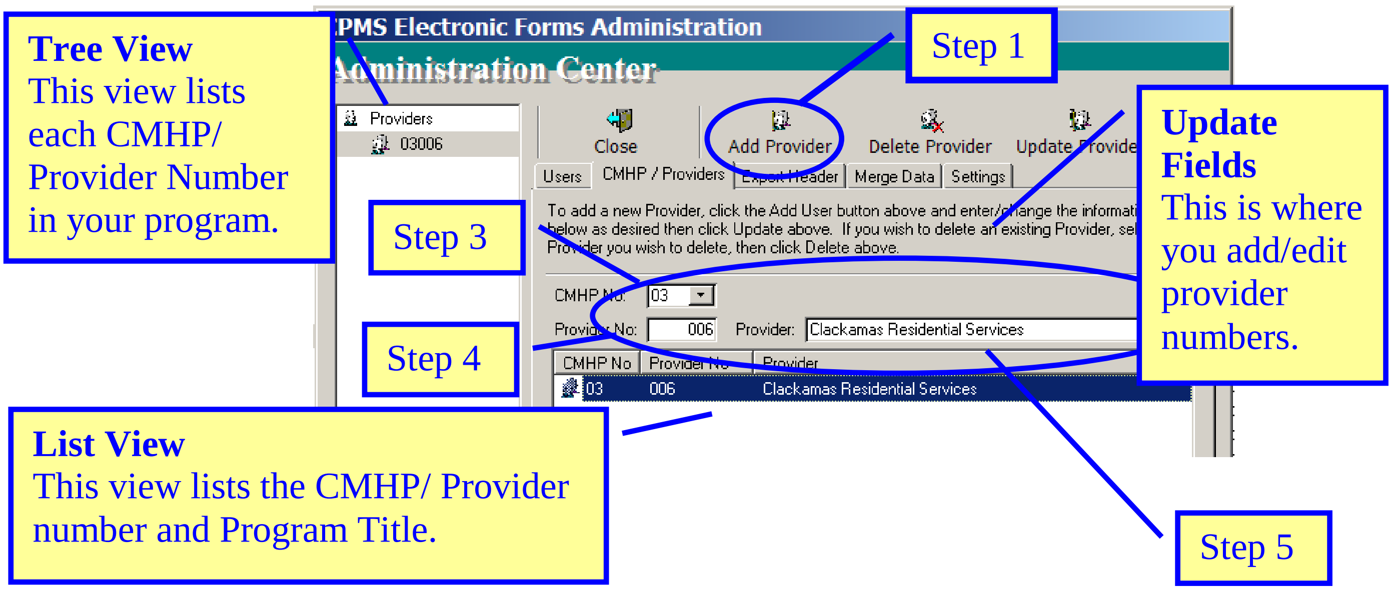
Note: Leave Retry attempts and Expire Term as they are.

Step 9 Click **Update User** button. This will refresh the tree view with the Users name.

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

Step 10 Select the CMHP/Provider Tab

Add New Provider



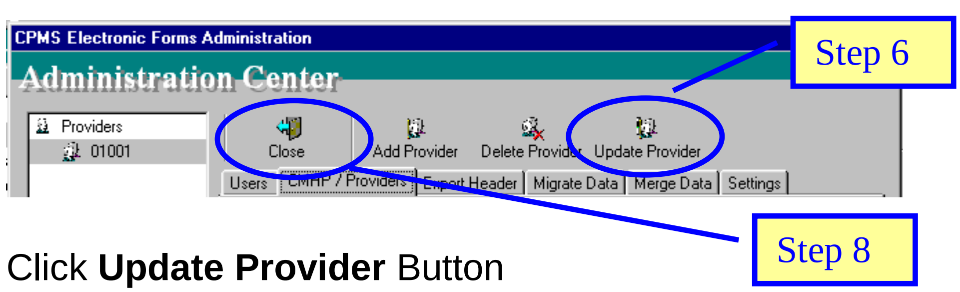
Step 1 Click **Add Provider** button, this will create a new record. Do the following steps below to change the entries from the new record to the correct data for each Provider Number you use.

Step 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

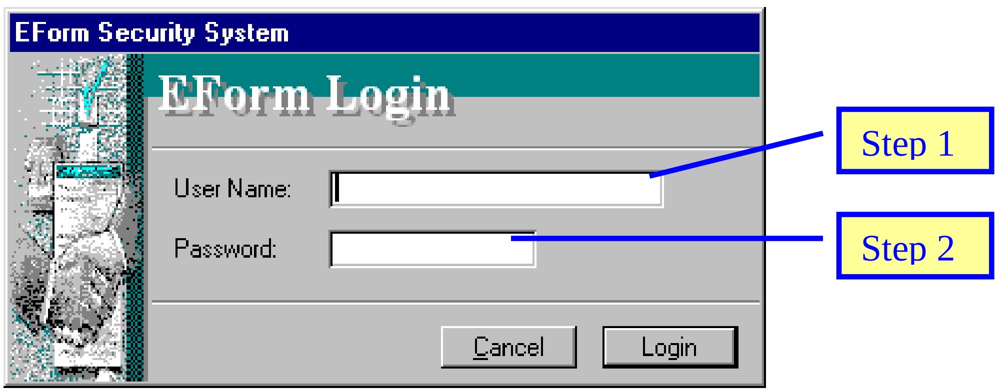
Step 7 Repeat steps 1 - 5 above for each provider you add.

Step 8 Click **Close**.

Login

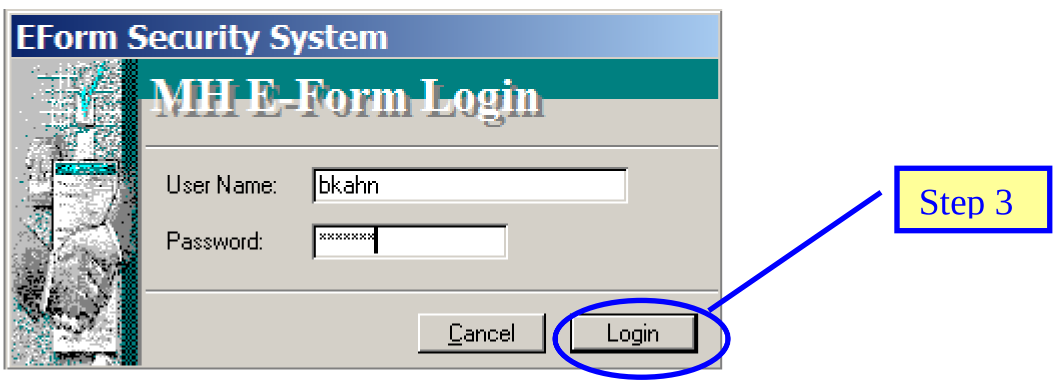
Now that you have put in the necessary data to get started, you will be required to login.

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



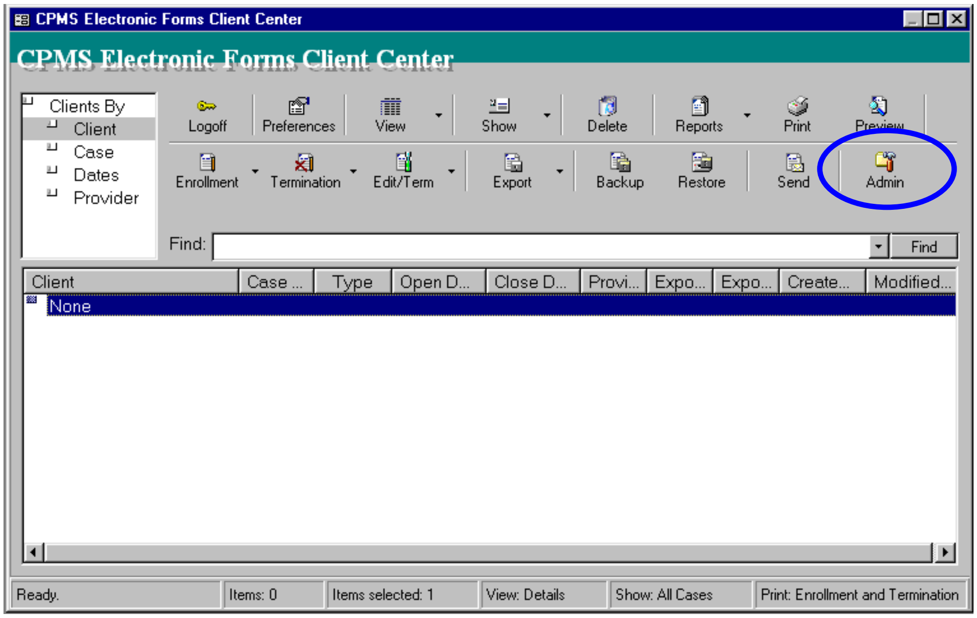
Step 1 Type in your user name. (e.g. fschwart)

Step 2 Type in your password.



Step 3 Click **Login**.

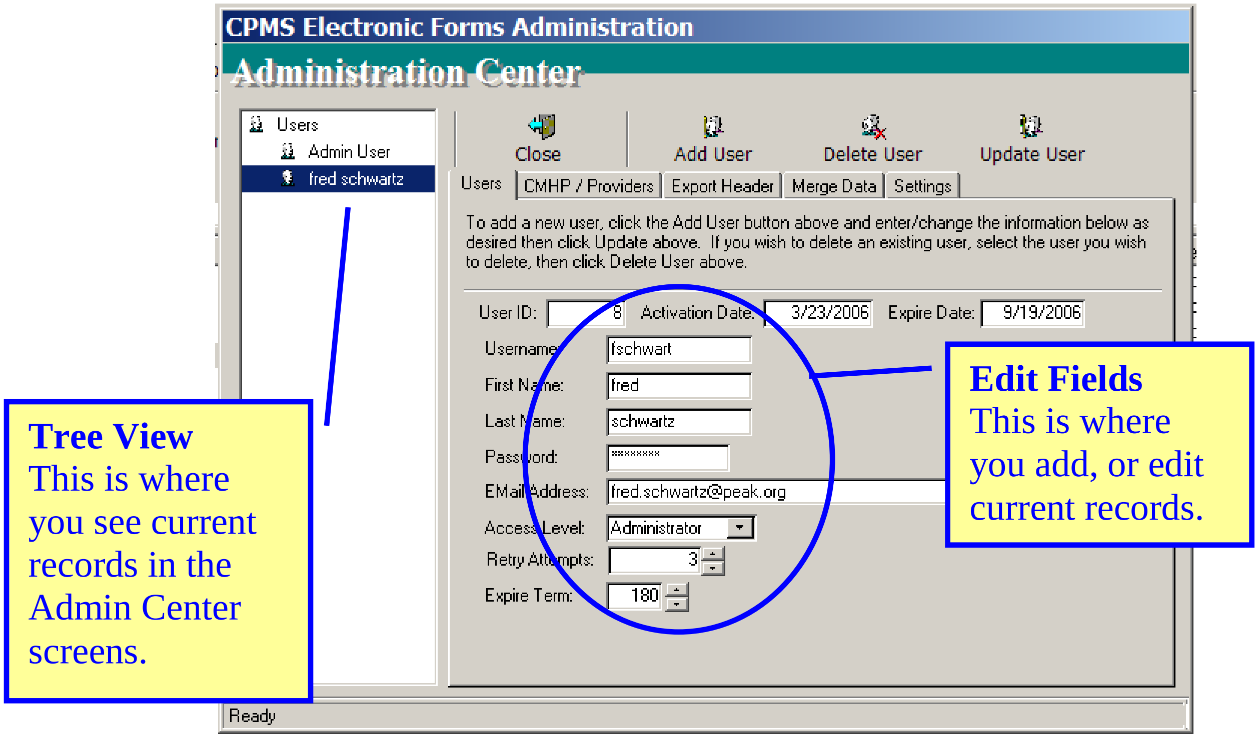
The Client center will open.



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

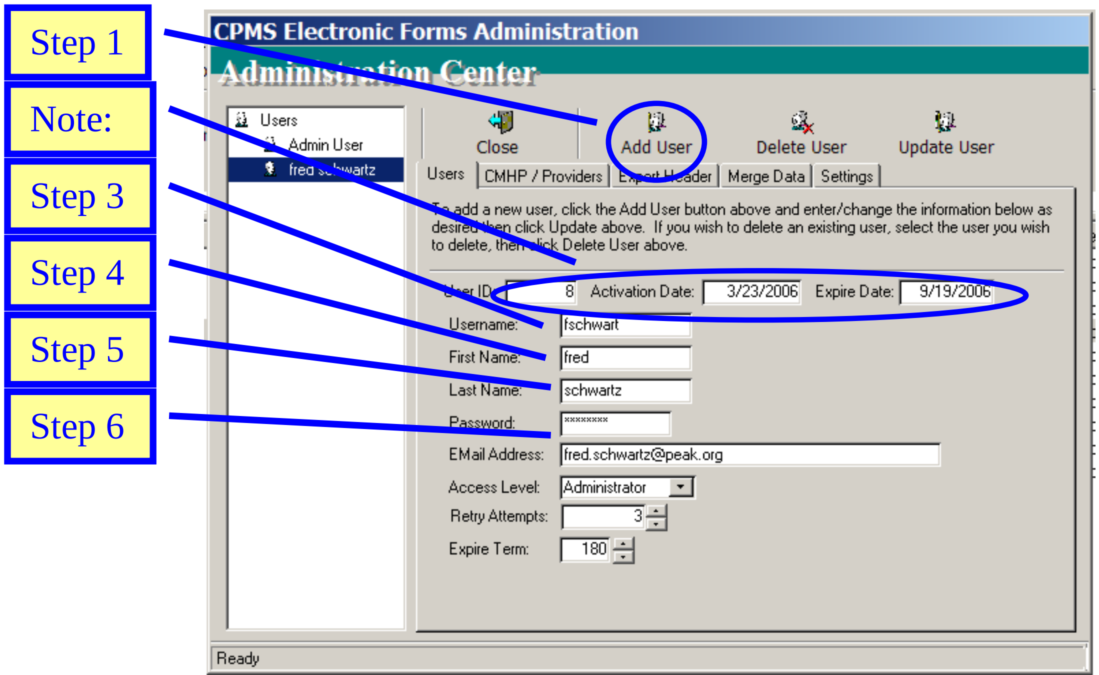
Chapter 3 - Administration Center

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.



Users Tab

Add New Users



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

Step 1 Click **Add User** button to create a new record. Do the following steps below to change the entries from the new record to the correct data for your employee.

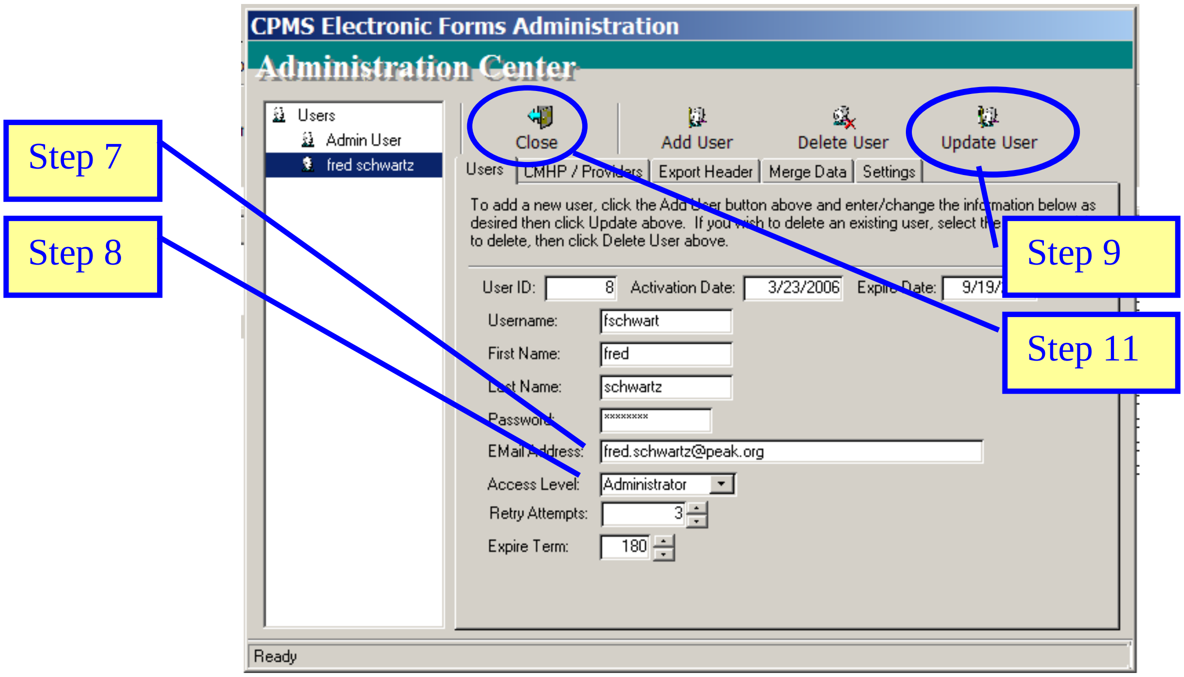
Step 2 Hit your **tab** Key to move to Username field.

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 default to "**password**" and can be changed by the user when they log in the first time.



Step 7 Enter User's email address. (e.g. fred.schwartz@ peak.org)

Step 8 **Select the proper access level. You must have at least one administrator, we recommend a minimum of 2.** Most other users will be employees.

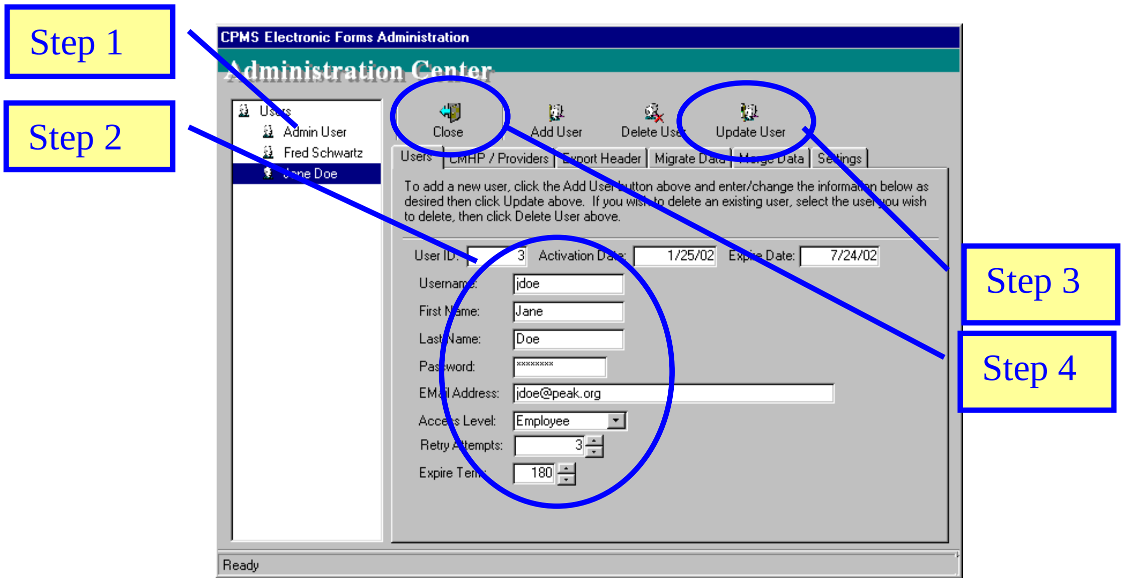
Note: Leave Retry attempts and Expire Term as they are.

Step 9 Click **Update User** button. This will refresh the tree view with the Users name.

Step 10 Repeat steps 1 - 10 above for each user you add.

Step 11 Clicking the **Close** button will return you to the Client Center.

Edit Users



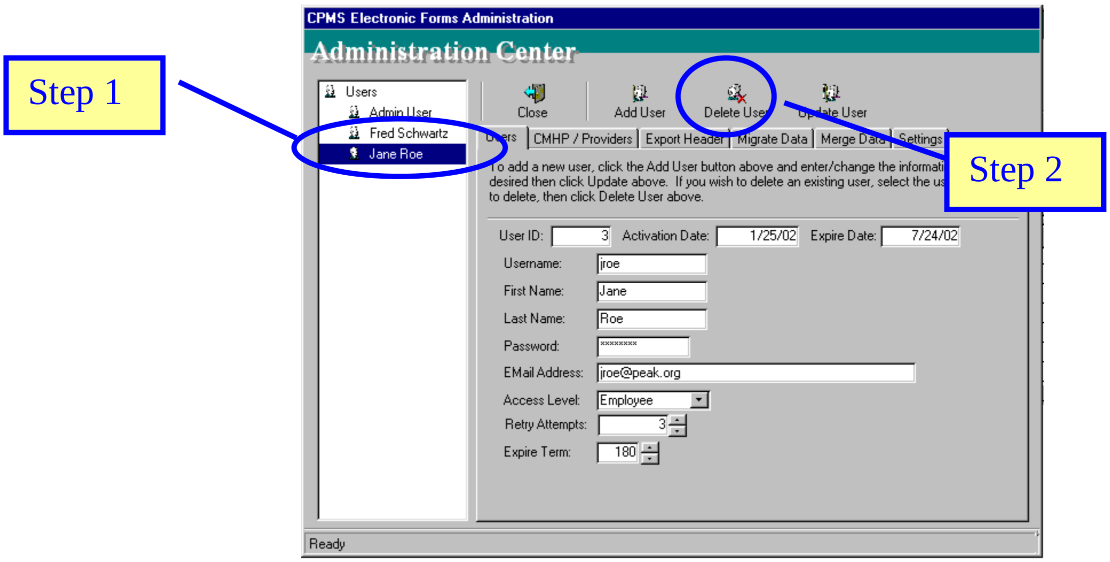
Step 1 Highlight the user you wish to edit by clicking their name in the Tree View.

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.

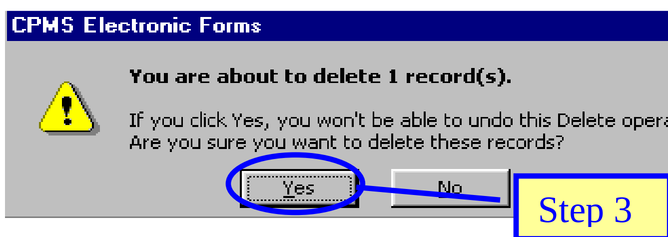
Step 4 Clicking the **Close** button will return you to the Client Center.

Delete Users

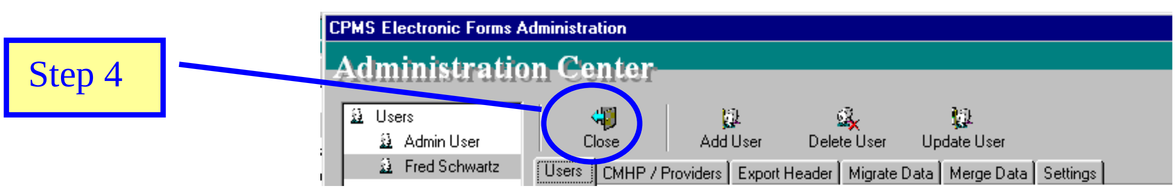


Step 1 Highlight the user you wish to Delete by clicking their name in the Tree View.

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



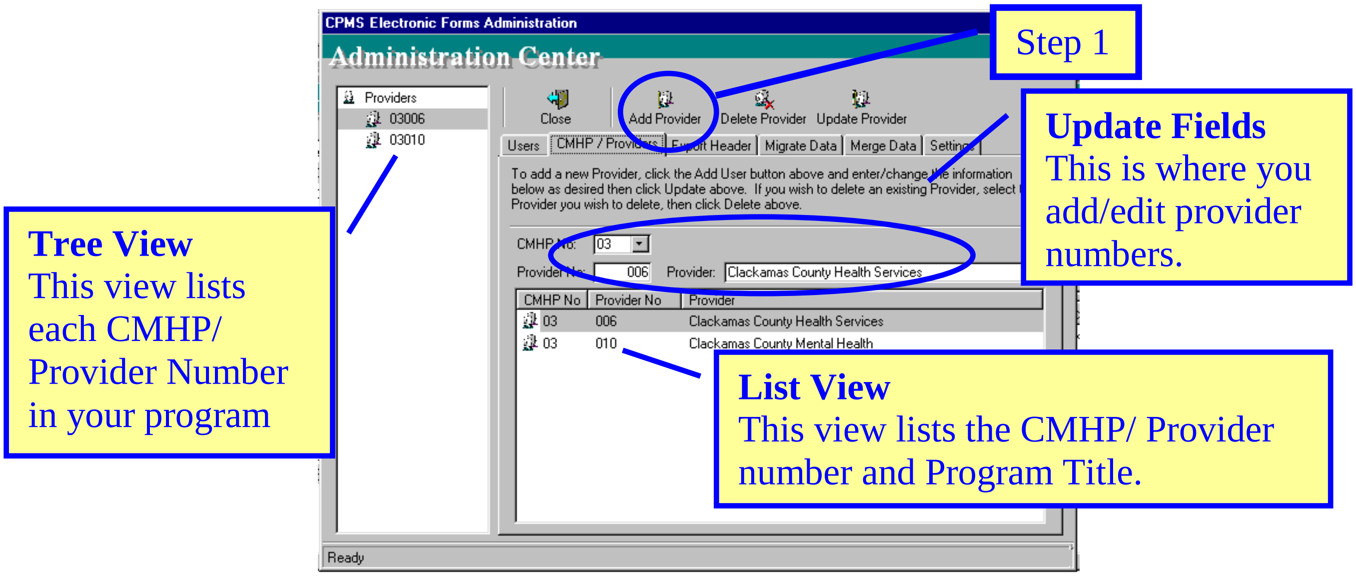
Step 3 Click **Yes.**



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

CMHP/Provider Tab

Add New Provider



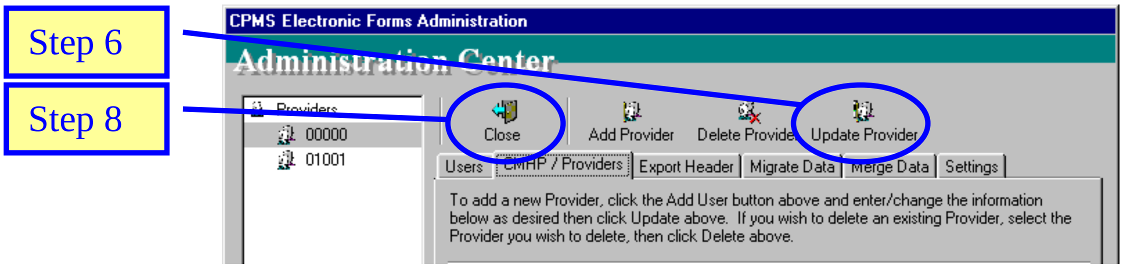
Step 1 Click **Add Provider** button, this will create a new record. Do the following steps below to change the entries from the new record to the correct data for each Provider Number you use.

Step 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)

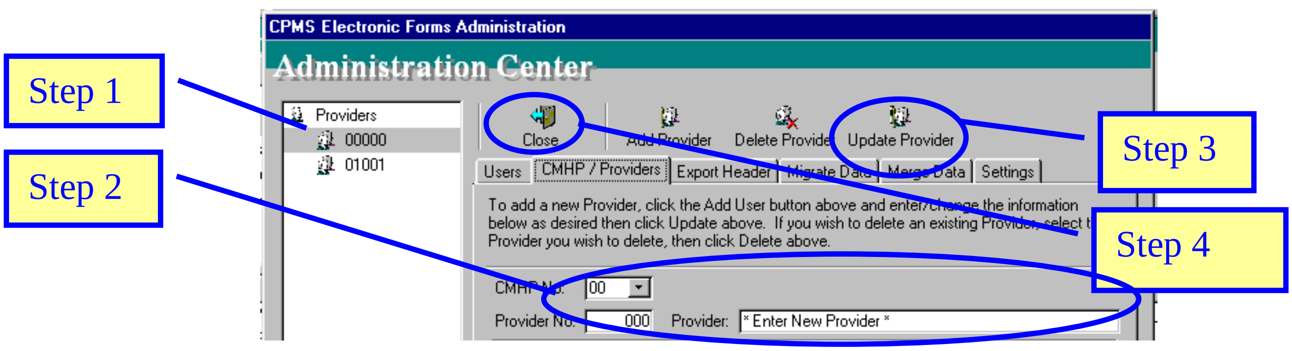


Step 6 Click **Update Provider** Button

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



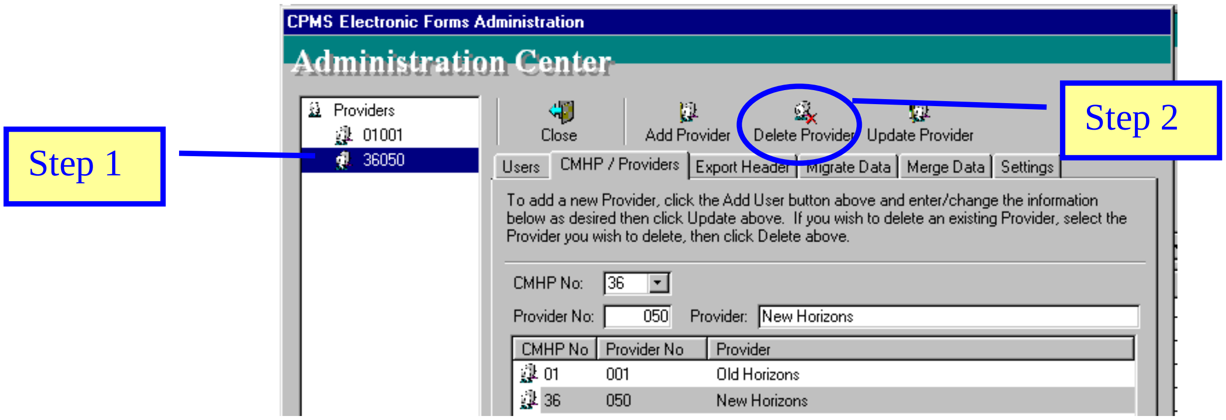
Step 1 Highlight the Provider you wish to edit by clicking the correct CMHP/Provider Number in the Tree View.

Step 2 Highlight by clicking in the field(s) you want to edit. (e.g. Title changes from Clackamas County Mental Health to Clackamas County Mental Health Services)

Step 3 Click **Update Provider** button.

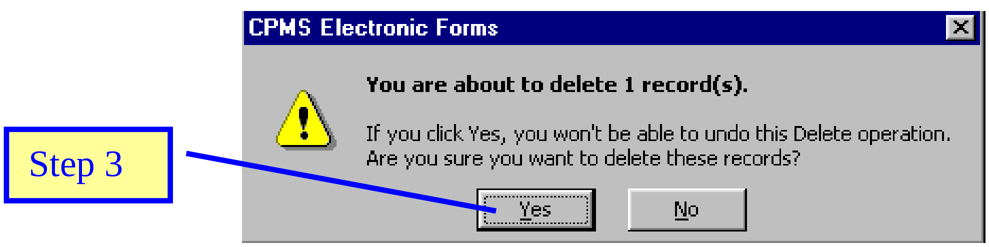
Step 4 Clicking the **Close** button will return you to the Client Center.

Delete Provider

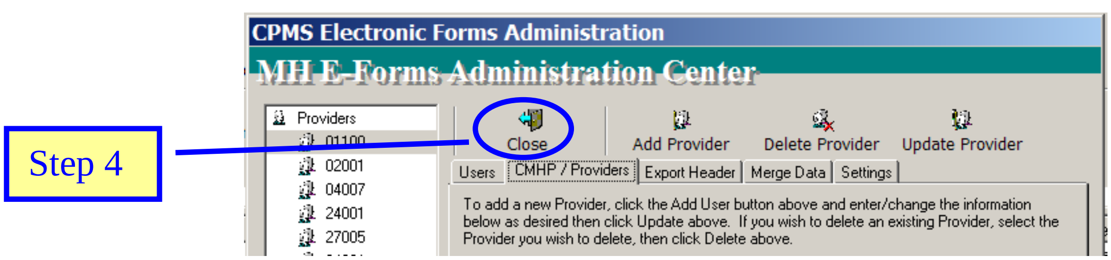


Step 1 Highlight the Provider you wish to Delete by clicking correct CMHP Provider Number in the Tree View.

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



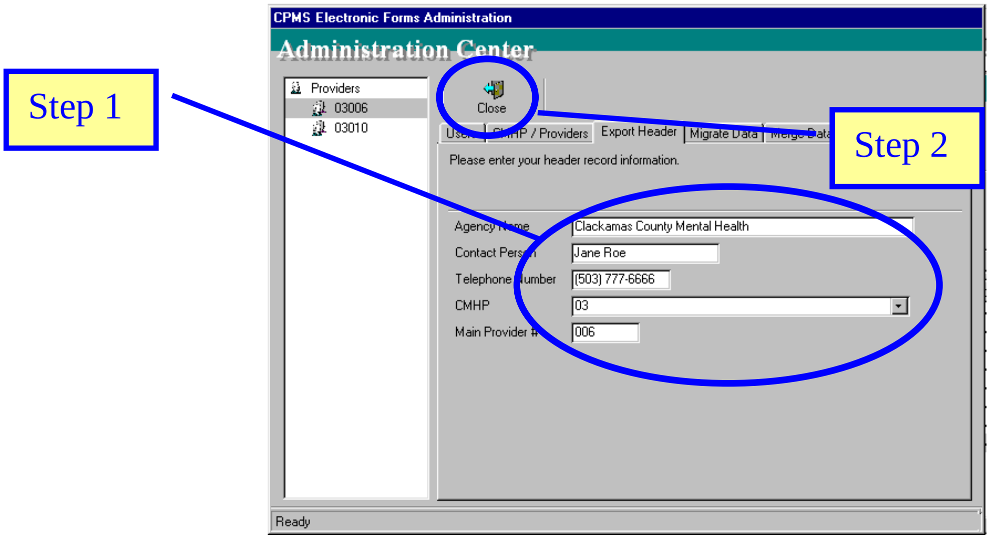
Step 3 Click Yes.



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.

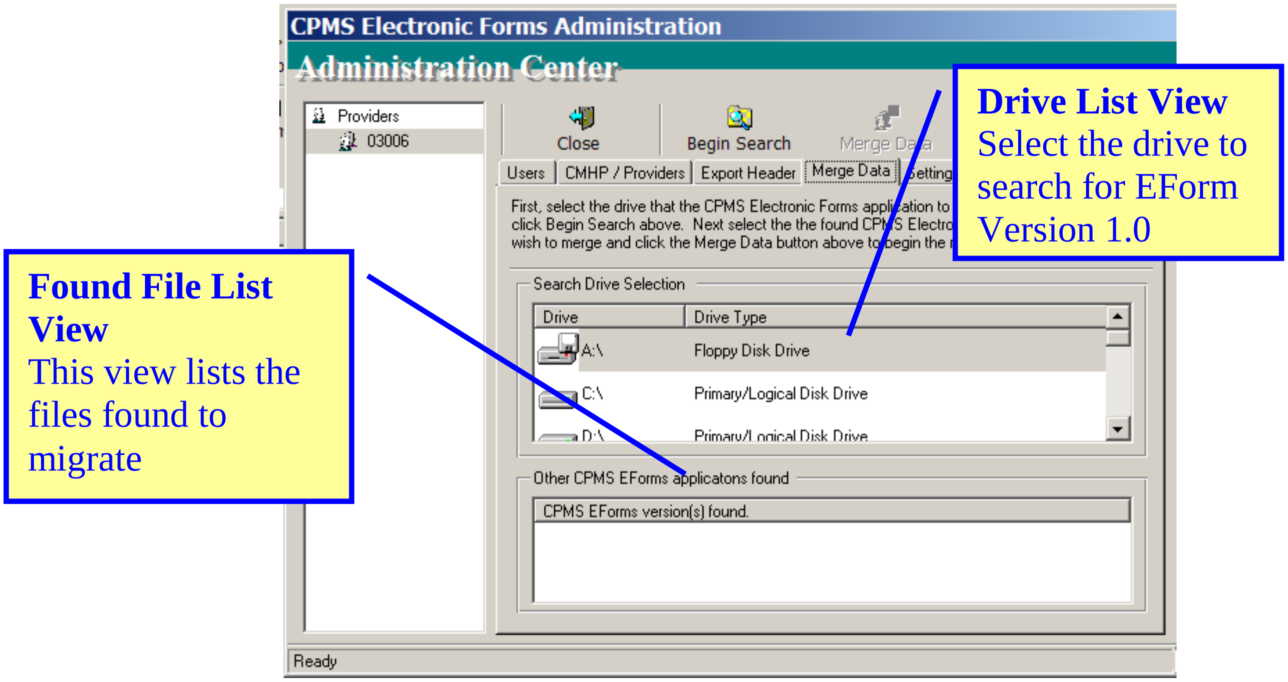
Step 1 Edit the fields that need to be changed

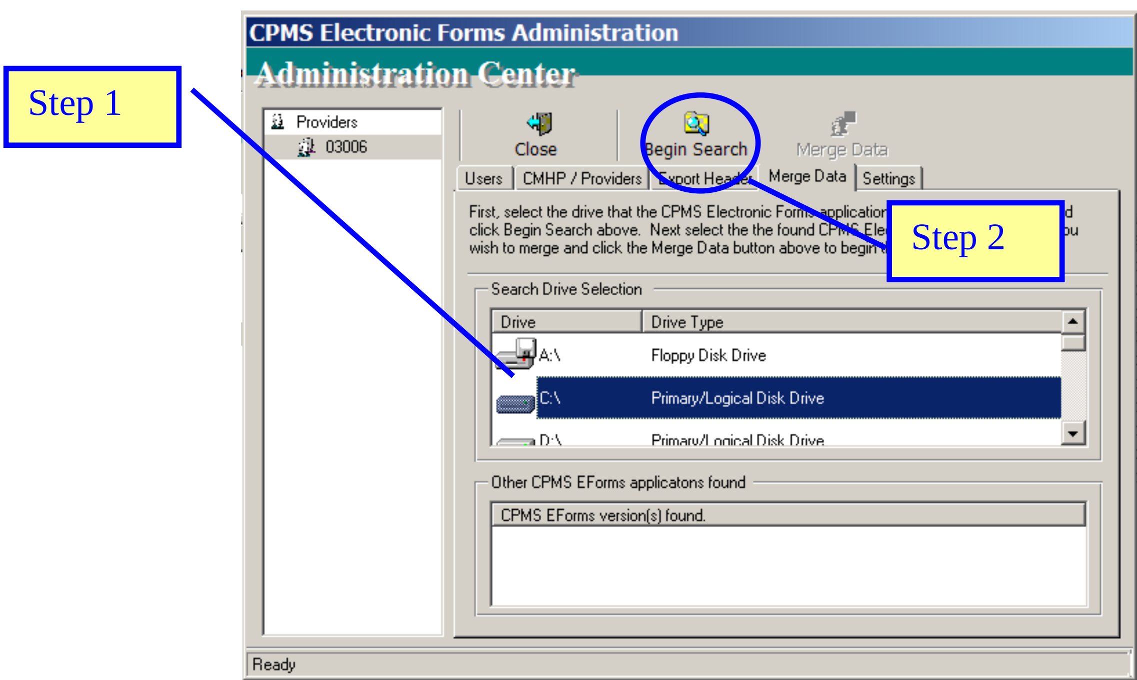
Step 2 Clicking the **Close** button will return you to the Client Center.

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.

Merge Data Tab

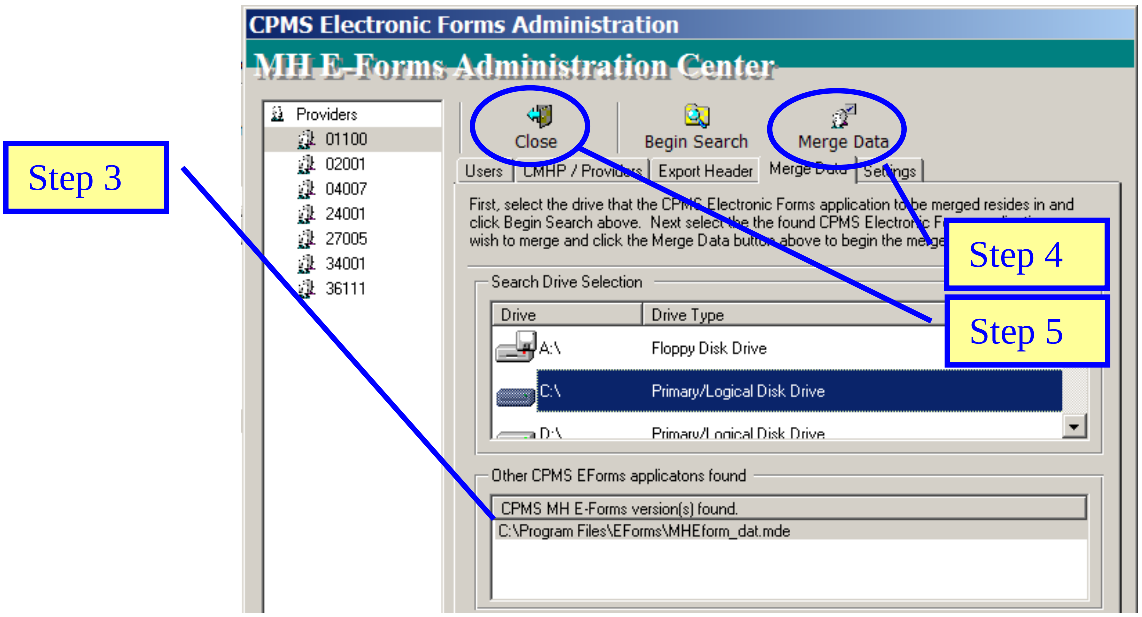
If you have multiple provider locations, and one closes, you can merge one database into another using the Merge function.





Step 1 Select the drive to search for CPMS Eform to be merged.

Step 2 Click **Begin Search**.



Step 3 Select the file to merge data from.

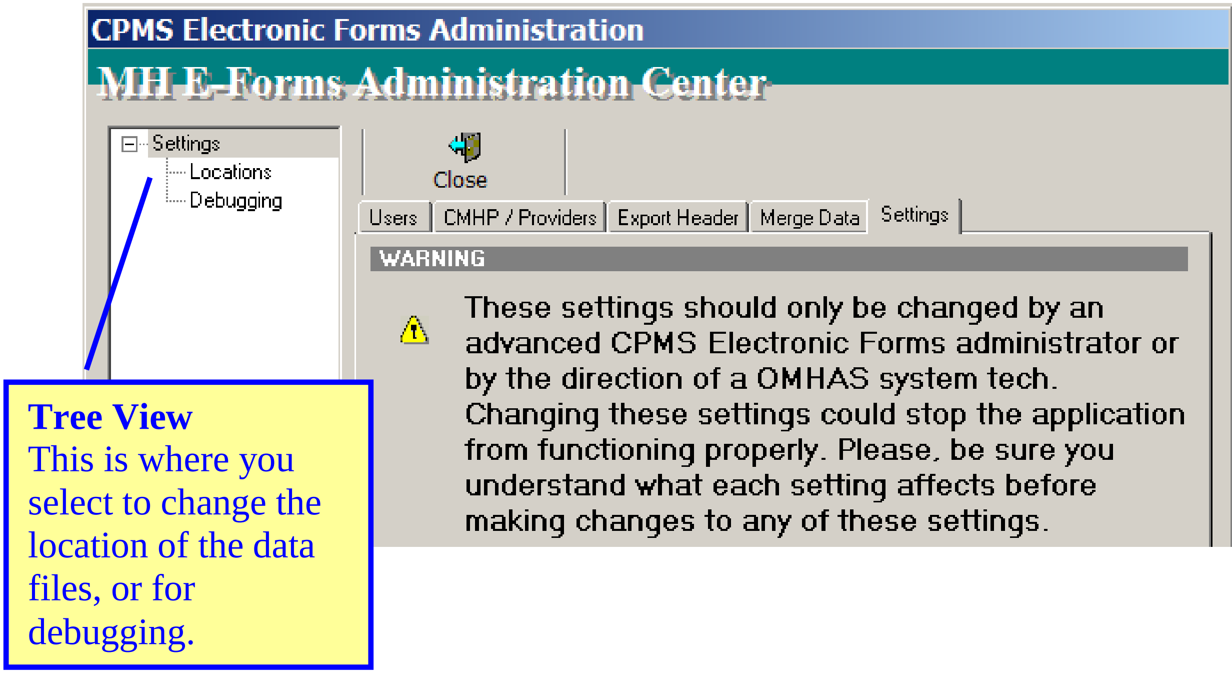
Step 4 Click **Merge Data**.

You will get the following message after Merging is complete. Click OK.

Step 5 Clicking the **Close** button will return you to the Client Center.

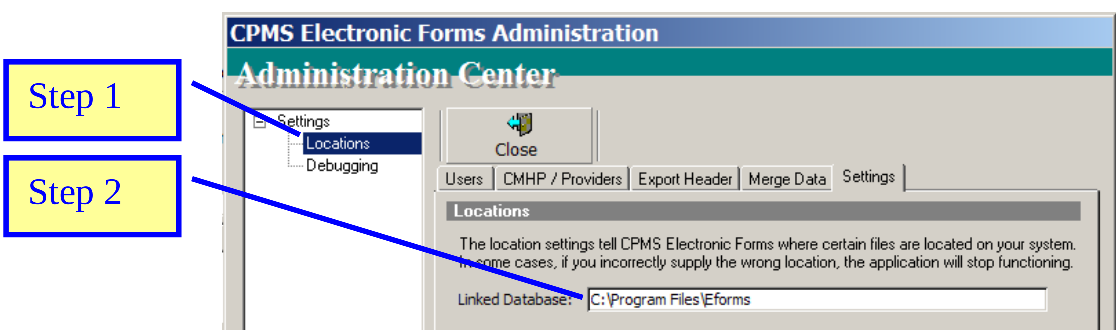
Settings Tab

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



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

Location

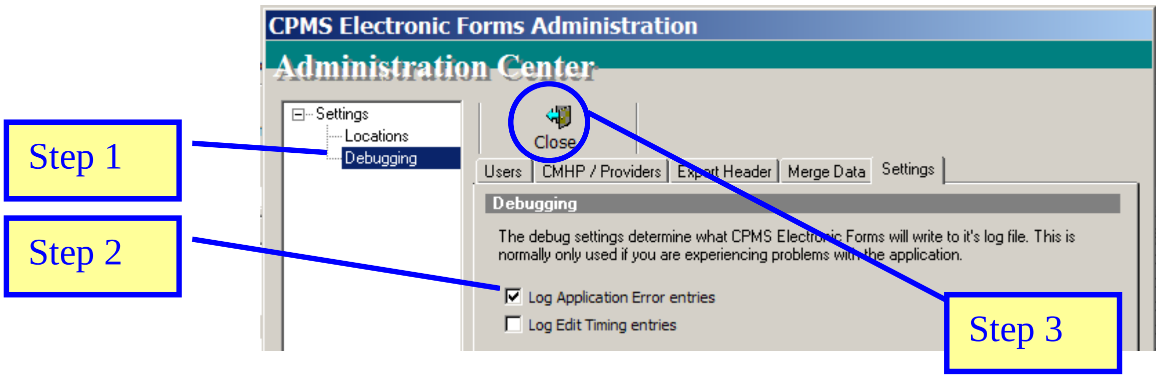


Step 1 Click **Locations** in tree view.

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

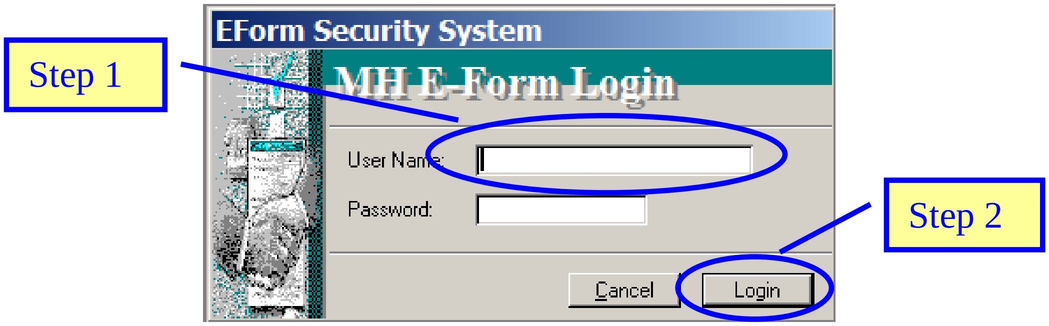
Caution: You must put a copy of your data files in the new location BEFORE you change the path in this field! If you don't, your database will lock and you will not be able to get into it.

Debugging



Step 1	Click **Debugging** in the tree view.
Step 2	This is where you would set the debug options, if the OMHAS Technician or Systems administrator asks you to change the settings.
Step 3	Clicking the **Close** button will return you to the Client Center.

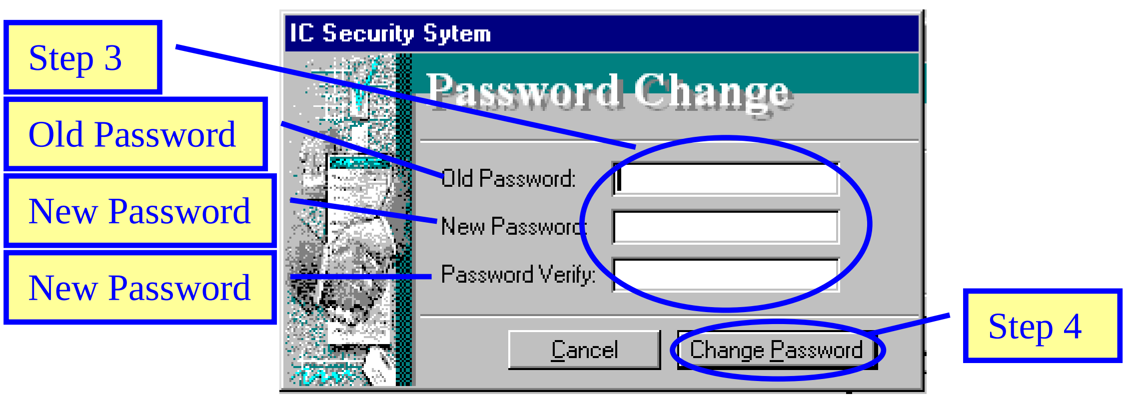
Chapter 4 - Application Login



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 may be "**password**". When you log in using this default as your password the following screen will come up:

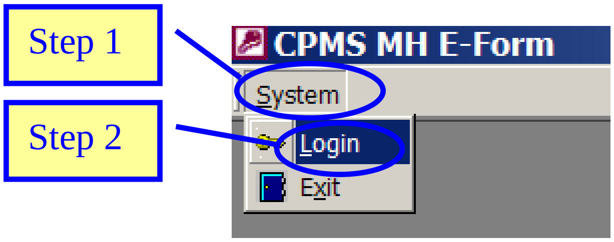


Step 3 Type **password** as your old password and then enter a new password of your choice. Enter your new password again.

Step 4 Click **Change Password**.

Note: This screen will also come up for you to change your password every time the **Expire date** is passed.

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

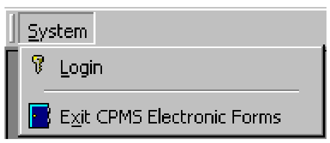


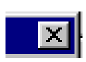
Logoff

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

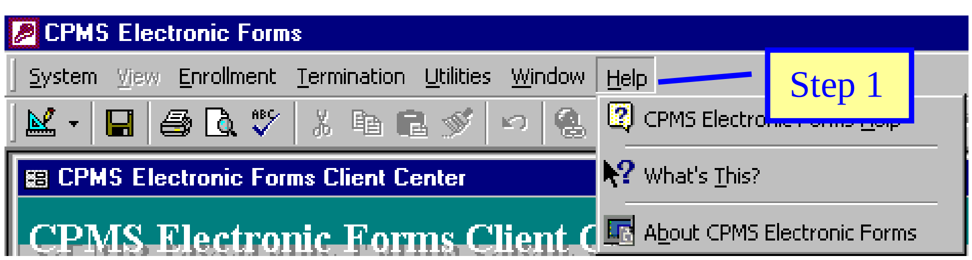
Exit Application

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



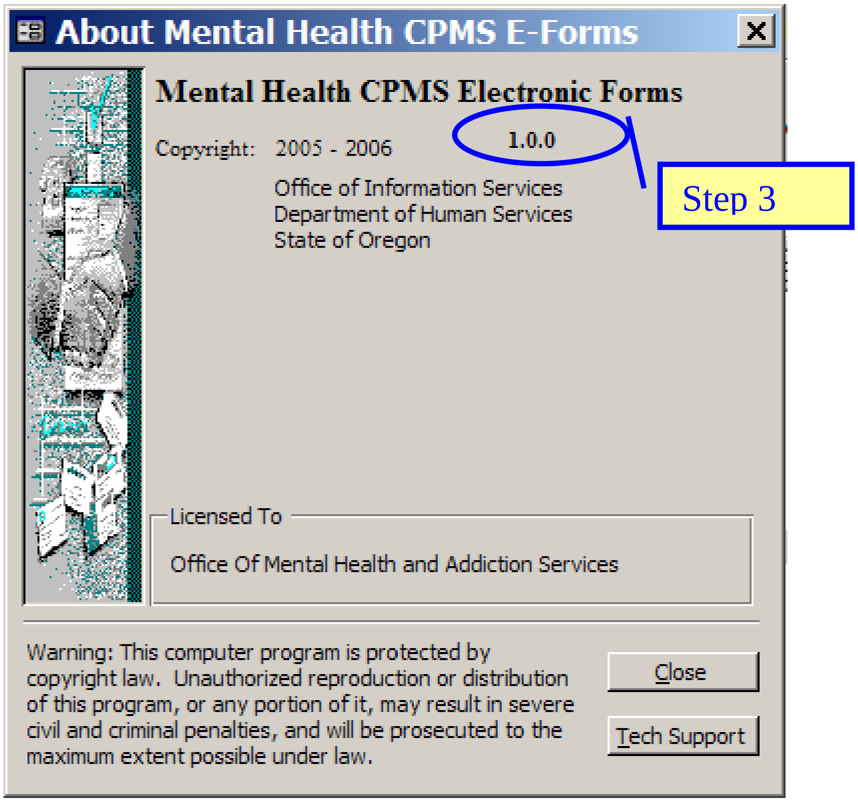
Or click the  in the upper right corner of the computer screen.

Identifying the Version



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

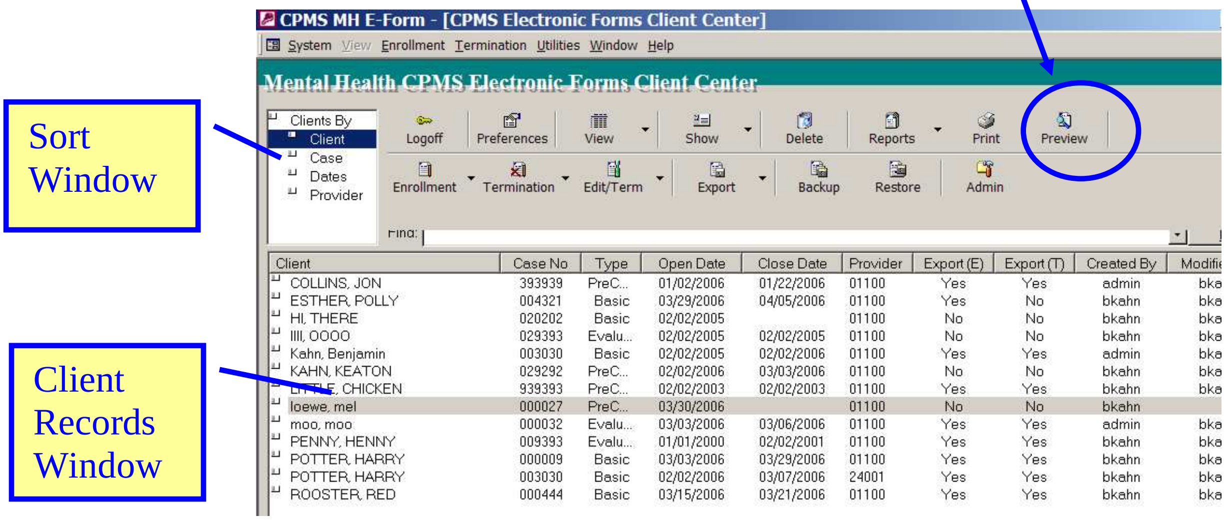
Step 2 Click **About CPMS Electronic Forms.**



Step 3 The version number is at the top right corner of the 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 button option.

Sort Window

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

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 No	Type	Open Date	Close Date	Provider	Export (E)	Export (T)	Created By
COLLINS, JON	393939	PreC...	01/02/2006	01/22/2006	01100	Yes	Yes	admin
ESTHER, POLLY	004321	Basic	03/29/2006	04/05/2006	01100	Yes	No	bkahn
HI, THERE	020202	Basic	02/02/2005		01100	No	No	bkahn

Sorted By Case

Case No	Client	Type	Open Date	Close Date	Provider	Export (...	Export (...	Created By
000009	POTTER, HARRY	Basic	03/03/2006	03/29/2006	01100	Yes	Yes	bkahn
000027	loewe, mel	PreCommit	03/30/2006		01100	No	No	bkahn
000032	moo, moo	Evaluation	03/03/2006	03/06/2006	01100	Yes	Yes	admin

Sorted by Dates

Open Date	Close Date	Client	Case No	Type	Provider	Export (...	Export (...	Created By
02/02/2005		HI, THERE	020202	Basic	01100	No	No	bkahn
03/30/2006		loewe, mel	000027	PreCommit	01100	No	No	bkahn
01/01/2000	02/02/2001	PENNY, HENNY	009393	Evaluation	01100	Yes	Yes	bkahn

Sorted by Provider

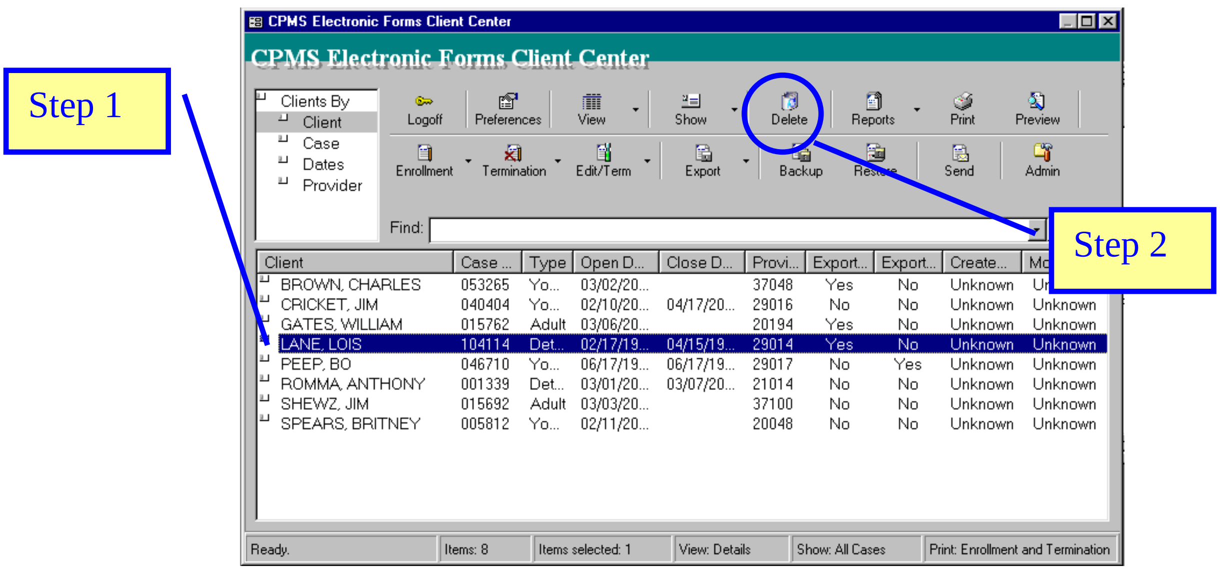
Provider	Client	Case No	Type	Open Date	Close Date	Export (...	Export (...	Created By
01100	loewe, mel	000027	PreCommit	03/30/2006		No	No	bkahn
01100	HI, THERE	020202	Basic	02/02/2005		No	No	bkahn
01100	ESTHER, POLLY	004321	Basic	03/29/2006	04/05/2006	Yes	No	bkahn

Deleting Client Records

CAUTION: Once you delete a client, they are gone. There is no "undo". 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 OMHAS before doing a restore.

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.

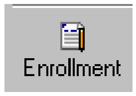
To highlight records that are not contiguous, click the first record, hold down the ctrl key and click on each record you want to select while holding down the ctrl key.

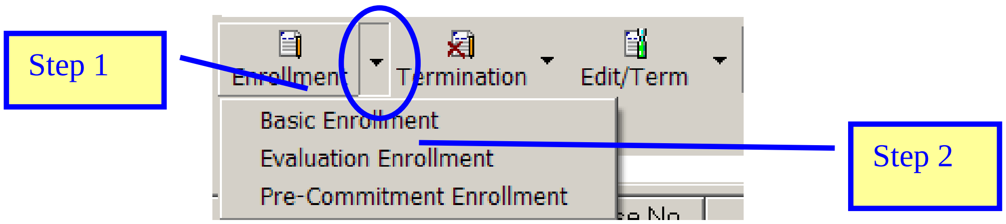
Step 2 Select **Delete** from the toolbar.

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

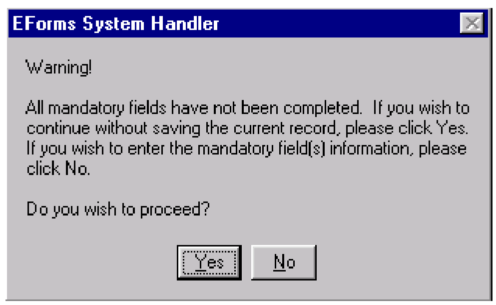
In CPMS, there are three different forms: Basic or Residential Services (orange), Evaluation Services (red), or Pre-Commitment Services (green).

Once inside the form, key in the information. Please refer to the **CPMS Manual for Mental Health Service Providers** if you have questions regarding what goes in each box. As you enter the information, the **tab** key or the **mouse** can be used to move you through the form.

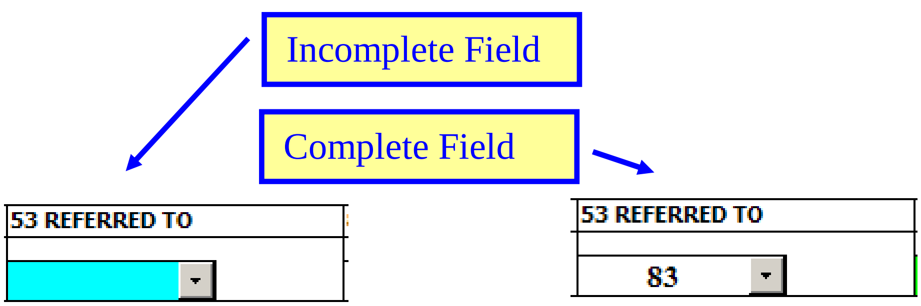
Step 3 When you are finished entering client information, close the form with the lower X in the upper right corner of the form or click on **Next Form** to fill out another form.

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.



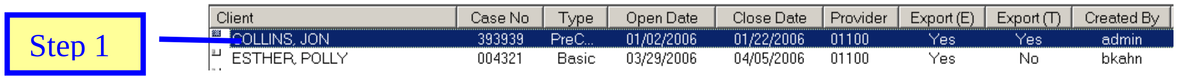
Be sure to finish filling out the entire form before moving on to a new form (incomplete boxes are blue and change color when filled out)



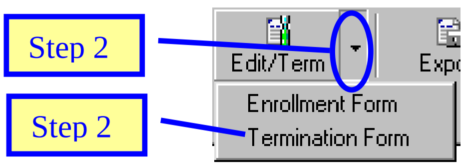
Note: If the form is not entirely filled out, it will not let you export (send the data to OMHAS) until it is complete. The only field that can be left blank is 29 Prime Number.

Termination

Terminating Clients Enrolled Electronically



Step 1 To terminate a client who was enrolled electronically, Highlight by clicking on the client.



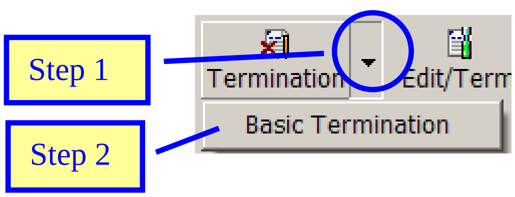
Step 2 Select the dropdown arrow (▼) next to **Edit/Term** from the toolbar.

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

Terminating Clients Not Enrolled Electronically

Step 1 If this is a client who was not enrolled electronically, select the dropdown arrow (▼) next to **Termination** on the toolbar.

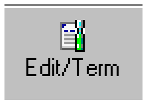
Step 2 **Select the appropriate form for the client**; there will be no pre-filled data in a blank termination form. Since there is only one termination form for Mental Health, you can just click the Termination button.

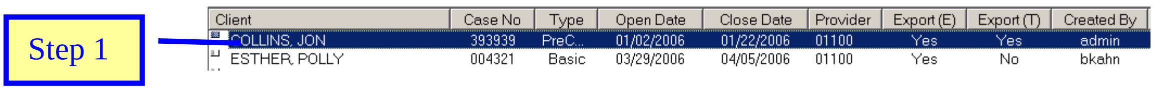


Once inside the form, key in the information. Please refer to the **Using CPMS Manual** if you have questions regarding what goes in each box. As you enter the information, the **tab** key or the **mouse** can be used to move you through the form.

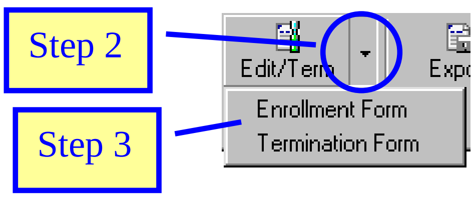
Edit Clients

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.





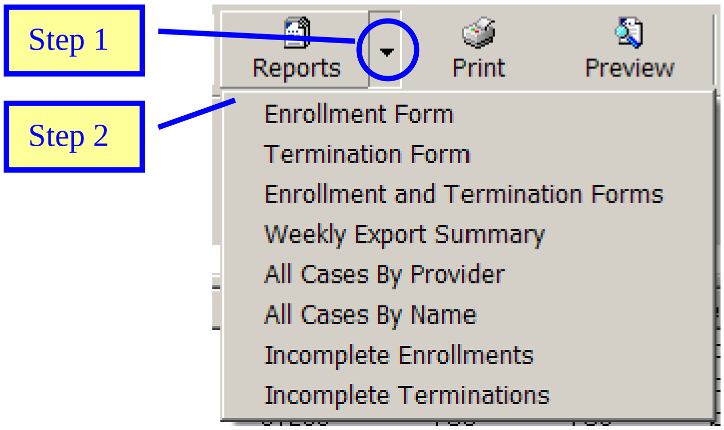
Step 1 To edit a client, Highlight by clicking on the client in the Client Center.



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 **Reports** on the toolbar.

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

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

Termination Form - This will allow you to see 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 open for review if the form exists, or to be printed, depending on what your choice is.

<u>Please note</u>: the **Evaluation** and the **Pre-Commitment** form have the enrollment and termination information all on one page. The **Basic and Residential Services** (orange) form has a separate termination form.

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

Weekly Export Summary Report

MH CPMS E-Forms - Weekly Export Report

Basic Services Termination - 0190

Last Name	First Name	Case	CMHP	Provider	Open Date
ESTHER	POLLY	004321	01 Baker	100 ben's tx	3/29/2006

Total Basic Services Termination - 0190 1

All Cases By Provider – This report shows a list of all your clients sorted by provider number.

All Cases By Provider Report

CPMS EForms - All Cases By Provider

CMHP 01 Provider 200

Case Number	Last Name	First Name	Open Date
000002	crane	icabob	2/2/2005
000009	kerry	john	2/2/2006
000033	robin	christopher	4/1/2005
002343	kahn	ben	2/2/2006
030303	KAHN	BENJAMIN	2/2/2005
234342	BI	BO	2/2/2004

Total Cases 6

CMHP 03 Provider 006

Case Number	Last Name	First Name	Open Date
034234	Bush	George	2/2/2006

Total Cases 1

All Cases by Name - This report shows a list of all your clients sorted by last name.

All Cases by Name Report

CPMS EForms - All Cases By Name

Last Name	First Name	Case	CMHP	Provider	Open Date
BI	BO	234342	01	200	2/2/2004
Bush	George	034234	03	006	2/2/2006
carlisle	kitty	000330	03	300	5/27/2005
crane	icabob	000002	01	200	2/2/2005
kahn	ben	002343	01	200	2/2/2006
KAHN	BENJAMIN	030303	01	200	2/2/2005
kerry	john	000009	01	200	2/2/2006
robin	christopher	000033	01	200	4/1/2005

Total Cases 8

Incomplete Enrollments - This reports shows all client forms that are incomplete, and therefore have not been exported. The forms must be completed to export.

Incomplete Enrollments Report

MH CPMS E-Forms - Incomplete Enrollments

Basic Services Enrollments - 0189

LastName	FirstName	Case Number	CMHP	Provider	OpenDate
HI	THERE	020202	01 Baker	100 ben's tx	2/2/2005

Total Basic Services Enrollments 1

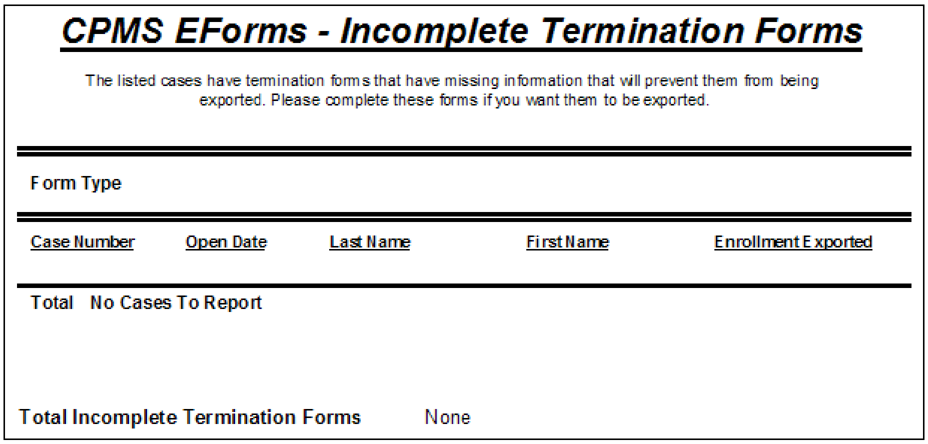
Pre-Commitment Services - 0381

LastName	FirstName	Case Number	CMHP	Provider	OpenDate
loewe	mel	000027	01 Baker	100 ben's tx	3/30/2006

Total Pre-Commitment Services 1

Incomplete Terminations - This reports shows all client termination forms that are incomplete, and therefore have not been exported. The forms must be completed to export.

Incomplete Termination Report



CPMS 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.

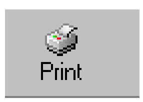
Form Type

Case Number	Open Date	Last Name	First Name	Enrollment Exported

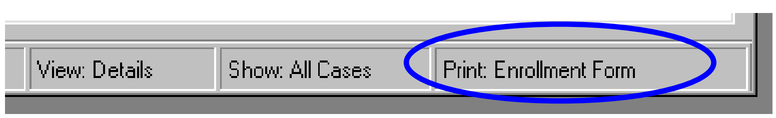
Total No Cases To Report

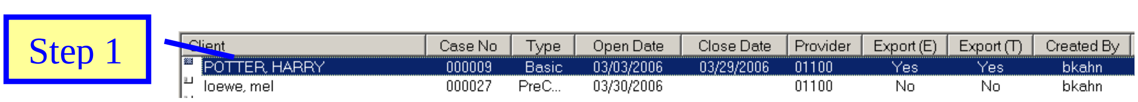
Total Incomplete Termination Forms None

Printing Individual Client Forms

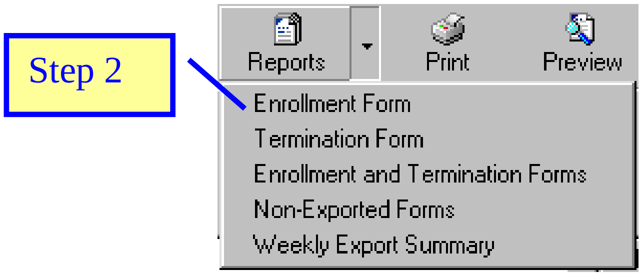


Note: The Print Button prints the report or form you have selected. The lower right corner of the Client Center will always show what will print.



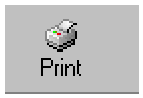


Step 1 Select the client for which you want to print a form.

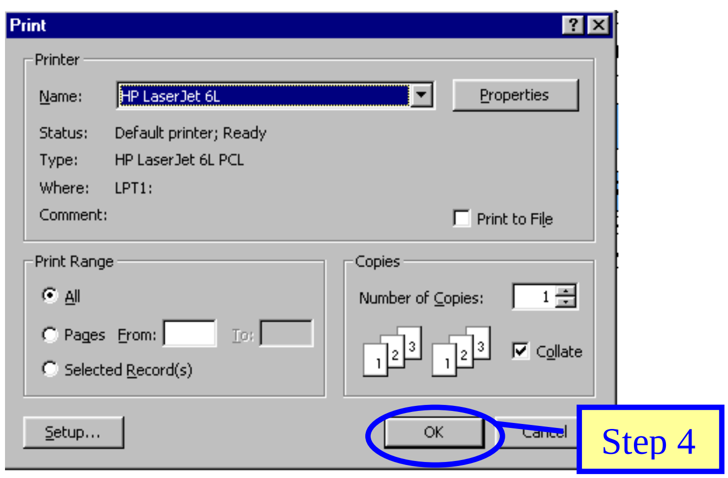


Step 2 Select form you want to print

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

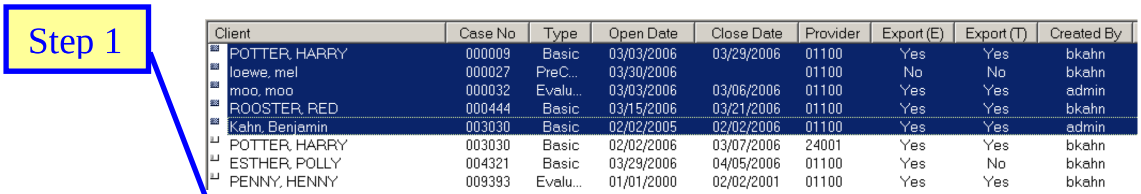


Another way of printing an individual form is by keying "**<Ctrl> P**", while you have a form opened. The following screen will appear and allow you to print the form you are currently looking at. (this will only print one form at a time)



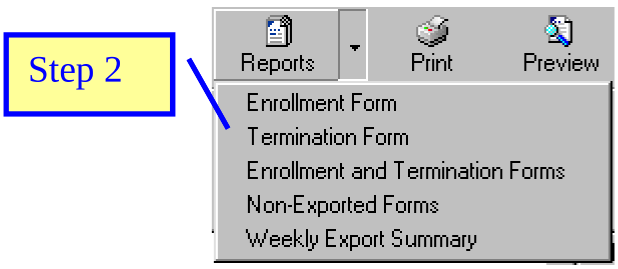
Step 4 Click **OK**.

Printing Multiple Forms

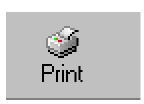


Client	Case No	Type	Open Date	Close Date	Provider	Export (E)	Export (T)	Created By
POTTER, HARRY	000009	Basic	03/03/2006	03/29/2006	01100	Yes	Yes	bkahn
loewe, mel	000027	PreC...	03/30/2006		01100	No	No	bkahn
moo, moo	000032	Evalu...	03/03/2006	03/06/2006	01100	Yes	Yes	admin
ROOSTER, RED	000444	Basic	03/15/2006	03/21/2006	01100	Yes	Yes	bkahn
Kahn, Benjamin	003030	Basic	02/02/2005	02/02/2006	01100	Yes	Yes	admin
POTTER, HARRY	003030	Basic	02/02/2006	03/07/2006	24001	Yes	Yes	bkahn
ESTHER, POLLY	004321	Basic	03/29/2006	04/05/2006	01100	Yes	No	bkahn
PENNY, HENNY	009393	Evalu...	01/01/2000	02/02/2001	01100	Yes	Yes	bkahn

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.

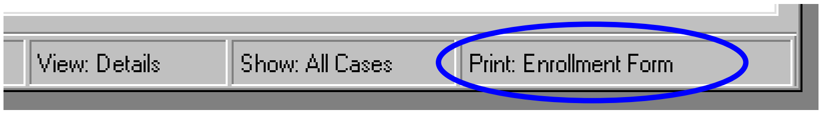


Step 3 Click **Print** on the Tool Bar

Preview

The preview button previews the report or form you have set as default or have selected with the **Reports** button on the Client Center.

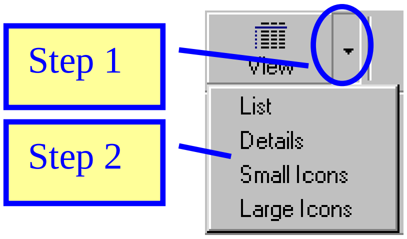
The preview button opens a preview of the report or form you have selected. The lower right corner of the Client Center will always show what will preview.



This works the same way print does, however all forms will open in preview mode without printing. 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.

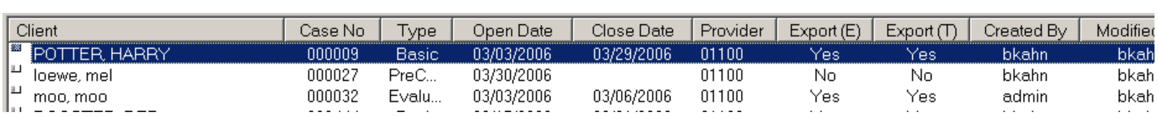


Step 1 To change the view, select the dropdown arrow (▼) next to **View** on the Toolbar

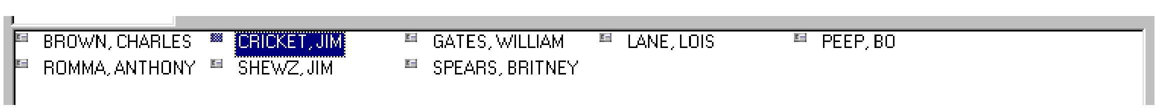
Step 2 Select **List**, **Details**, **Small** or **Large Icons**.

Records in List View

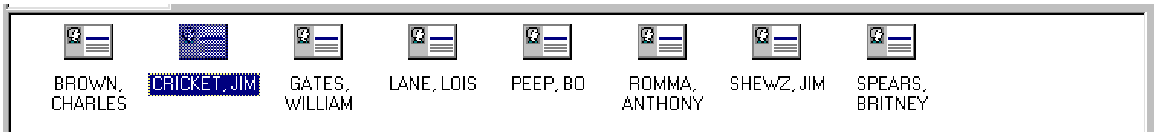
Records in Detail View



Records as Small Icons

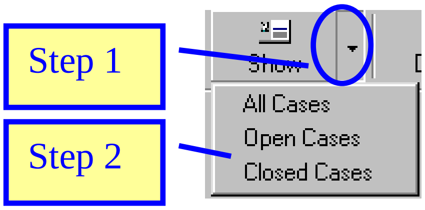


Records as Large Icons



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. It will always default to your choice of views when you login.



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 (...	Export (...	Created By
COLLINS, JON	393939	PreCommit	01/02/2006	01/22/2006	01100	Yes	Yes	admin
ESTHER, POLLY	004321	Basic	03/29/2006	04/05/2006	01100	Yes	No	bkahn
HI, THERE	020202	Basic	02/02/2005		01100	No	No	bkahn
IIII, OOOO	029393	Evaluation	02/02/2005	02/02/2005	01100	No	No	bkahn
Kahn, Benjamin	003030	Basic	02/02/2005	02/02/2006	01100	Yes	Yes	admin
KAHN, KEATON	029292	PreCommit	02/02/2006	03/03/2006	01100	No	No	bkahn
LITTLE, CHICKEN	939393	PreCommit	02/02/2003	02/02/2003	01100	Yes	Yes	bkahn
loewe, mel	000027	PreCommit	03/30/2006		01100	No	No	bkahn
moo, moo	000032	Evaluation	03/03/2006	03/06/2006	01100	Yes	Yes	admin
PENNY, HENNY	009393	Evaluation	01/01/2000	02/02/2001	01100	Yes	Yes	bkahn
POTTER, HARRY	000009	Basic	03/03/2006	03/29/2006	01100	Yes	Yes	bkahn
POTTER, HARRY	003030	Basic	02/02/2006	03/07/2006	24001	Yes	Yes	bkahn
ROOSTER, RED	000444	Basic	03/15/2006	03/21/2006	01100	Yes	Yes	bkahn

Open Cases

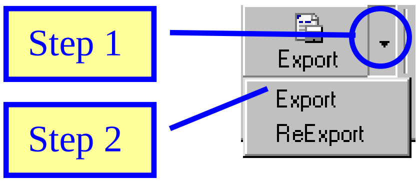
Client	Case No	Type	Open Date	Close Date	Provider	Export (...	Export (...	Created By
HI, THERE	020202	Basic	02/02/2005		01100	No	No	bkahn
loewe, mel	000027	PreCommit	03/30/2006		01100	No	No	bkahn

Closed Cases

Client	Case No	Type	Open Date	Close Date	Provider	Export (...	Export (...	Created By
COLLINS, JON	393939	PreCommit	01/02/2006	01/22/2006	01100	Yes	Yes	admin
ESTHER, POLLY	004321	Basic	03/29/2006	04/05/2006	01100	Yes	No	bkahn
IIII, OOOO	029393	Evaluation	02/02/2005	02/02/2005	01100	No	No	bkahn
Kahn, Benjamin	003030	Basic	02/02/2005	02/02/2006	01100	Yes	Yes	admin
KAHN, KEATON	029292	PreCommit	02/02/2006	03/03/2006	01100	No	No	bkahn
LITTLE, CHICKEN	939393	PreCommit	02/02/2003	02/02/2003	01100	Yes	Yes	bkahn
moo, moo	000032	Evaluation	03/03/2006	03/06/2006	01100	Yes	Yes	admin
PENNY, HENNY	009393	Evaluation	01/01/2000	02/02/2001	01100	Yes	Yes	bkahn
POTTER, HARRY	000009	Basic	03/03/2006	03/29/2006	01100	Yes	Yes	bkahn
POTTER, HARRY	003030	Basic	02/02/2006	03/07/2006	24001	Yes	Yes	bkahn
ROOSTER, RED	000444	Basic	03/15/2006	03/21/2006	01100	Yes	Yes	bkahn

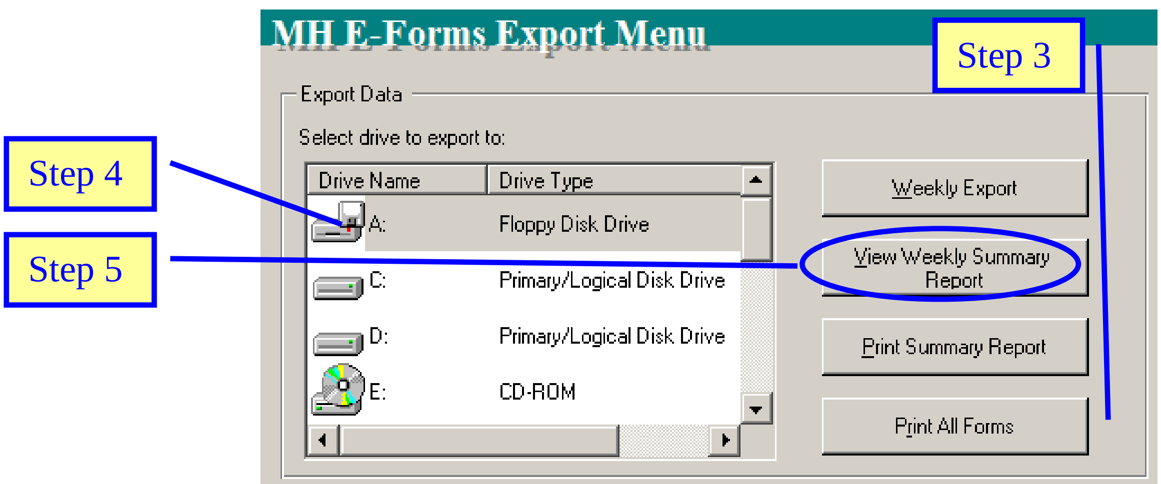
Export

Once a week you need to send the data (the electronic forms) to OMHAS. 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 Click the box if you want to print a copy of all exported forms.

Step 4 Select the Drive you want your export file to be sent to.

Step 5 You can preview what you are about to export by clicking on the **View Weekly Summary Report**. This report tells you what is about to be exported to OMHAS. Please be sure to print this out and use it to verify that you are sending the correct information to

OMHAS. While the report is open, you can key "<ctrl> P" to print the report. If you click on the **View Weekly Summary Report** after you export, the report will be blank.

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

Step 7 Click **Weekly Export**.

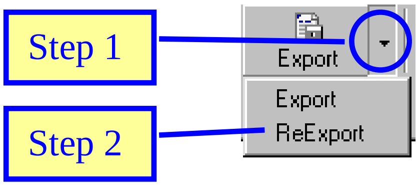
You should get the following message when Export is complete.

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

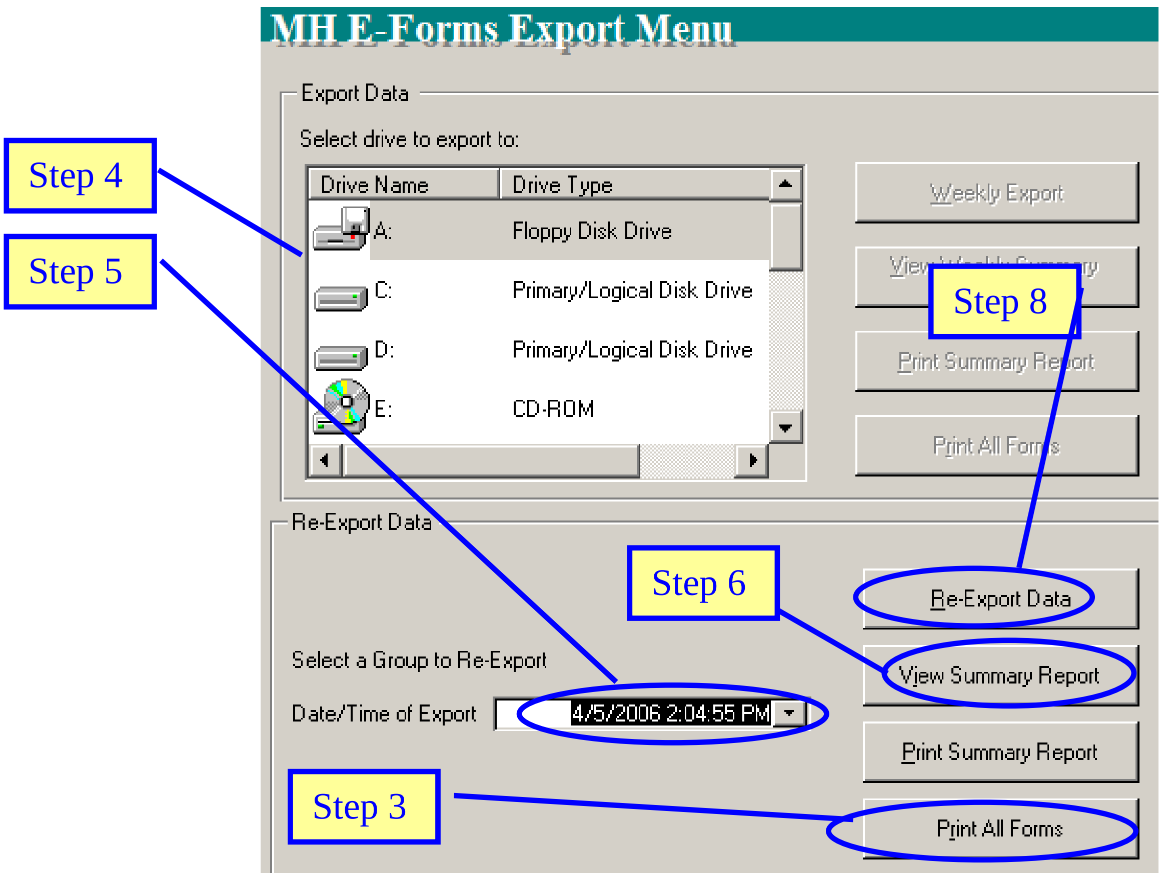
Re-Export

Occasionally, an exported file may not reach OMHAS, when this occurs you may need to do a re-export. **CALL OMHAS 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 Click the box if you want to print a copy of re-exported forms.

Step 4 Select the Drive you want your re-export file to be sent to.

Step 5 Choose the **date/time** to re-export (All exports show the Date and time of the original export.

Step 6 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 OMHAS. Please be sure to print this out and use it to verify that you are indeed sending the correct information to OMHAS. While the report is open, you can key "<ctrl> P" to print the report.

Step 7 Insert a disk into A: Drive if you are sending your re-export files to A.

Step 8 Click **Re-Export Data**.

You should get the following message when Export is complete.

Step 9 Click OK. You will automatically return to the Client Center.

Step 10 Send the file to: CPMS OASIS
500 Summer Street NE E86
Salem, OR 97301-1118

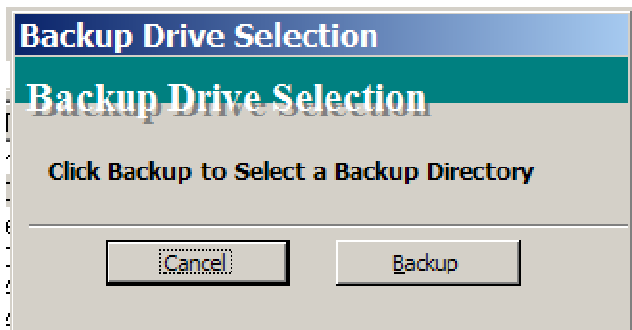
E-mail: cpms.oasis@state.or.us

Backup

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

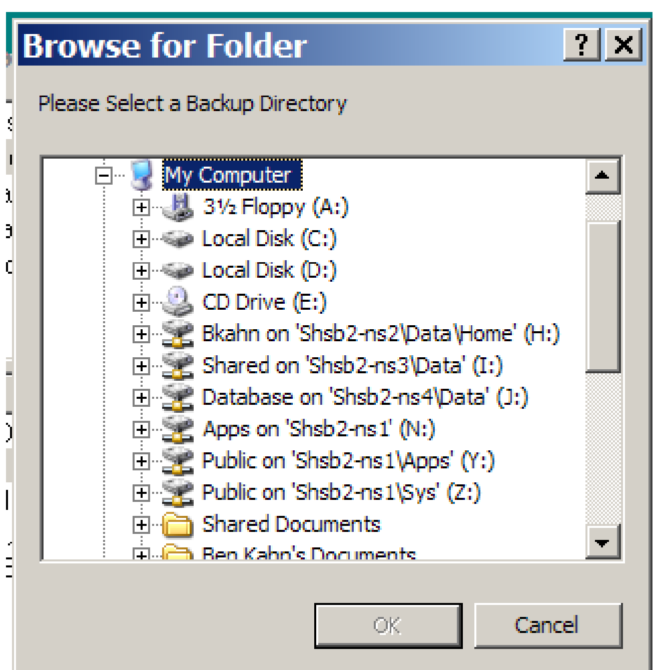
Backup will allow you to backup your database to a diskette.

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



Step 2 Click Backup to select the folder/drive you want your backup files to go to.

Step 3 Select a Backup Folder and click OK.



Note You may have to insert a disk into A: if you choose 3 ½ Floppy A.

You should get the following message:

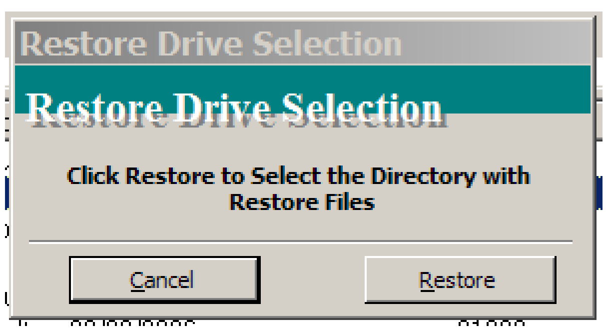
Step 4 Click OK again and you will be returned to the Client Center.

Restore

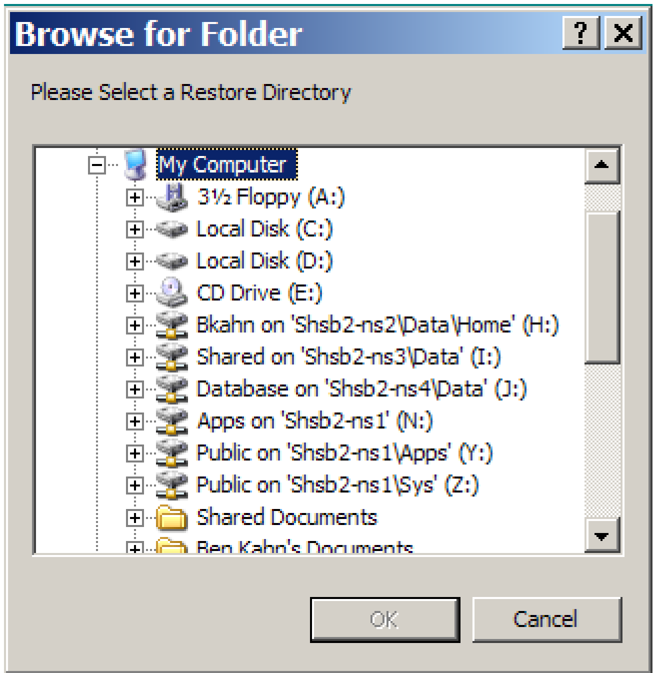
Caution: Restore will over-write all data in your database. Call OMHAS before doing a restore.

Restore will allow you to restore your database from a backup copy.

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



Step 2 Click Restore to choose to select the folder/drive you want your restore files to come from.



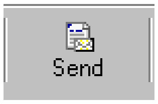
Step 3 Select the drive you want to restore from, If you choose Floppy Drive, insert your disk in the A: drive. Click OK.

You will get the following message:

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

Send

In a future release, you will be able to send your file via email by clicking the send button.



Step 1 If you Click the **Send** button at this time, you will get the following message.

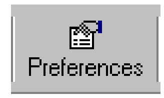
Step 2 Click ok and you will be returned to the Client Center. This function does not currently work.

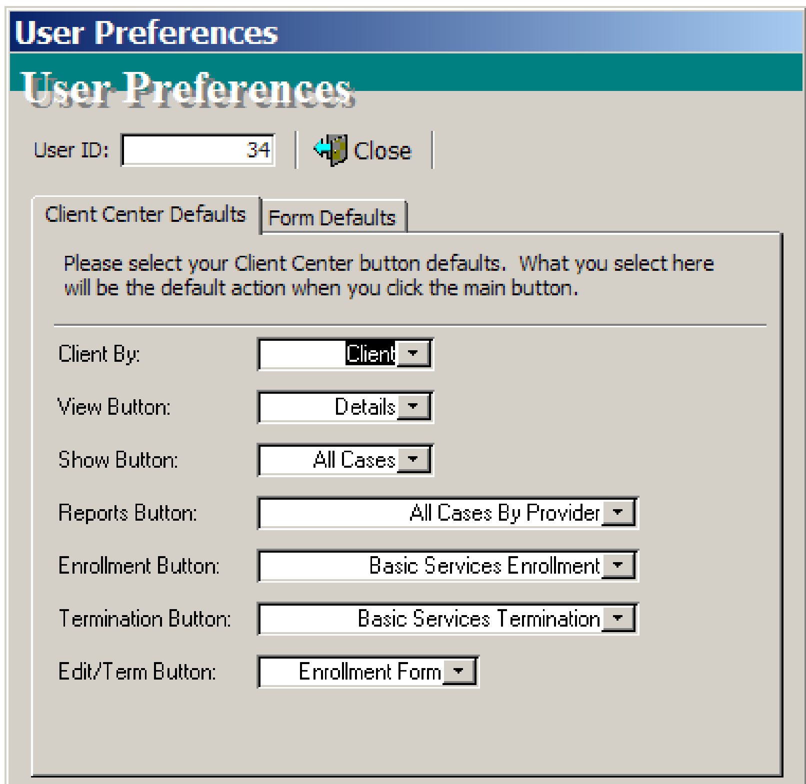
User Preferences

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.

Sorted by Clients

Client	Case No	Type	Open Date	Close Date	Provider	Export (E)	Export (T)	Created By
COLLINS, JON	393939	PreC...	01/02/2006	01/22/2006	01100	Yes	Yes	admin
ESTHER, POLLY	004321	Basic	03/29/2006	04/05/2006	01100	Yes	No	bkahn
HI, THERE	020202	Basic	02/02/2005		01100	No	No	bkahn

Sorted By Case

Case No	Client	Type	Open Date	Close Date	Provider	Export (...	Export (...	Created By
000009	POTTER, HARRY	Basic	03/03/2006	03/29/2006	01100	Yes	Yes	bkahn
000027	loewe, mel	PreCommit	03/30/2006		01100	No	No	bkahn
000032	moo, moo	Evaluation	03/03/2006	03/06/2006	01100	Yes	Yes	admin

Sorted by Dates

Open Date	Close Date	Client	Case No	Type	Provider	Export (...	Export (...	Created By
02/02/2005		HI, THERE	020202	Basic	01100	No	No	bkahn
03/30/2006		loewe, mel	000027	PreCommit	01100	No	No	bkahn
01/01/2000	02/02/2001	PENNY, HENNY	009393	Evaluation	01100	Yes	Yes	bkahn

Sorted by Provider

Provider	Client	Case No	Type	Open Date	Close Date	Export (...	Export (...	Created By
01100	loewe, mel	000027	PreCommit	03/30/2006		No	No	bkahn
01100	HI, THERE	020202	Basic	02/02/2005		No	No	bkahn
01100	ESTHER, POLLY	004321	Basic	03/29/2006	04/05/2006	Yes	No	bkahn

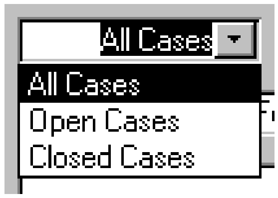
Set View Defaults

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.

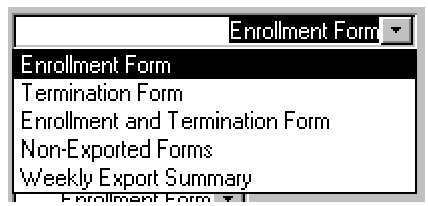
Set Default to Show Records

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.

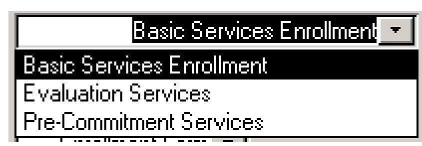
Set Default Report



Reports Button: Set default to Non-Exported Forms Report, Weekly Summary Report, Enrollment Form, Termination Form, or Both Enrollment and Termination Forms. This default setting affects both the Print and Print Preview buttons on the Toolbar.

See Chapter 5 - Client Center **Export** for examples.

Set Default Enrollment Button



Enrollment Button: Select the appropriate form to use when enrolling a new client.

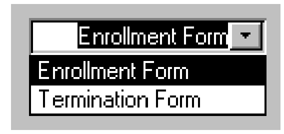
This can be 0189 Basic/Residential, 0379 Evaluation, or 0381 Pre-Commitment.

Set Default Termination Button

Termination Button: Select the appropriate form to use when completing a termination only client.

Currently, there is only one Mental Health Termination form, 0190 Basic/Residential Termination.

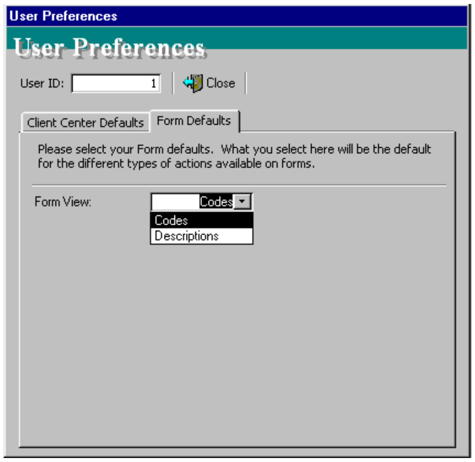
Set Default Edit/Term Button



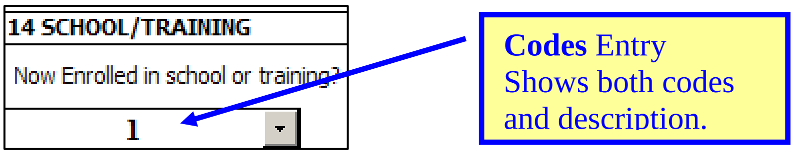
Edit/Term Button: Select the form you want this button to default to when you click on it. Selecting enrollment will open the appropriate enrollment form for the client you have highlighted. Selecting termination will open the appropriate termination form for the highlighted client.

Form Defaults

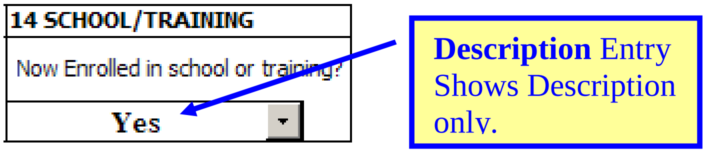
Set Form View Defaults



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

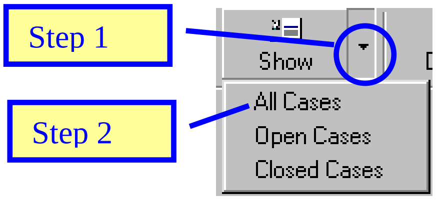


You can either select your entry or type your entry. The Codes version shows both codes and descriptions in the drop down but only allows you to input the codes. The Description version shows only the descriptions and no codes. Those new to CPMS may prefer the Description Version.



Editing Existing Clients

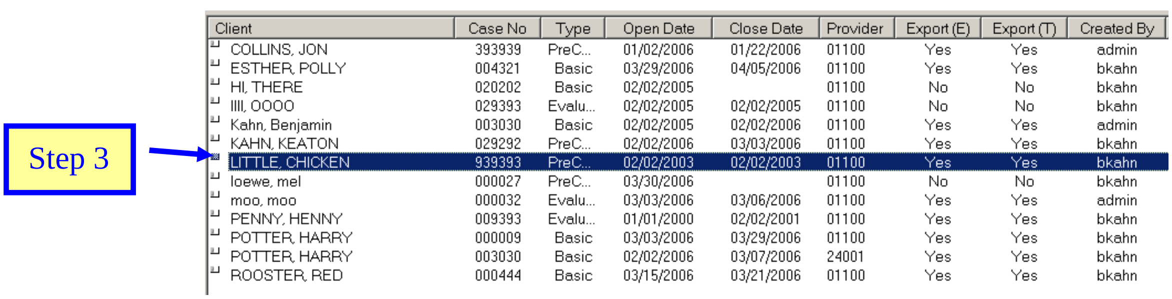
Before you export (send) data to OMHAS, you may want to change or add data to a previously entered record. This is easily done.



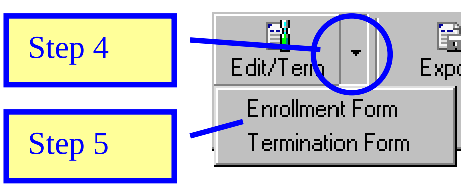
Step 1 The first thing you need to do is determine if the client that you want to edit is an open client or a closed client. If you aren't sure, select the dropdown arrow (▼) next to **Show** on the toolbar.

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.



Client	Case No	Type	Open Date	Close Date	Provider	Export (E)	Export (T)	Created By
COLLINS, JON	393939	PreC...	01/02/2006	01/22/2006	01100	Yes	Yes	admin
ESTHER, POLLY	004321	Basic	03/29/2006	04/05/2006	01100	Yes	Yes	bkahn
HI, THERE	020202	Basic	02/02/2005		01100	No	No	bkahn
IIII, OOOO	029393	Evalu...	02/02/2005	02/02/2005	01100	No	No	bkahn
Kahn, Benjamin	003030	Basic	02/02/2005	02/02/2006	01100	Yes	Yes	admin
KAHN, KEATON	029292	PreC...	02/02/2006	03/03/2006	01100	Yes	Yes	bkahn
LITTLE, CHICKEN	939393	PreC...	02/02/2003	02/02/2003	01100	Yes	Yes	bkahn
loewe, mel	000027	PreC...	03/30/2006		01100	No	No	bkahn
moo, moo	000032	Evalu...	03/03/2006	03/06/2006	01100	Yes	Yes	admin
PENNY, HENNY	009393	Evalu...	01/01/2000	02/02/2001	01100	Yes	Yes	bkahn
POTTER, HARRY	000009	Basic	03/03/2006	03/29/2006	01100	Yes	Yes	bkahn
POTTER, HARRY	003030	Basic	02/02/2006	03/07/2006	24001	Yes	Yes	bkahn
ROOSTER, RED	000444	Basic	03/15/2006	03/21/2006	01100	Yes	Yes	bkahn



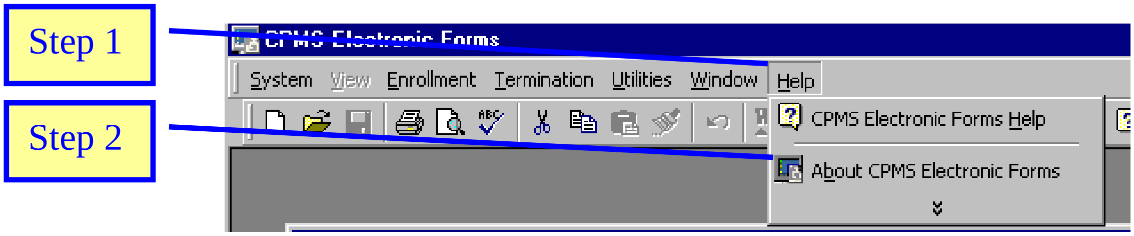
Step 4 Select the dropdown arrow (▼) next to **Edit/Term** from the toolbar.

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

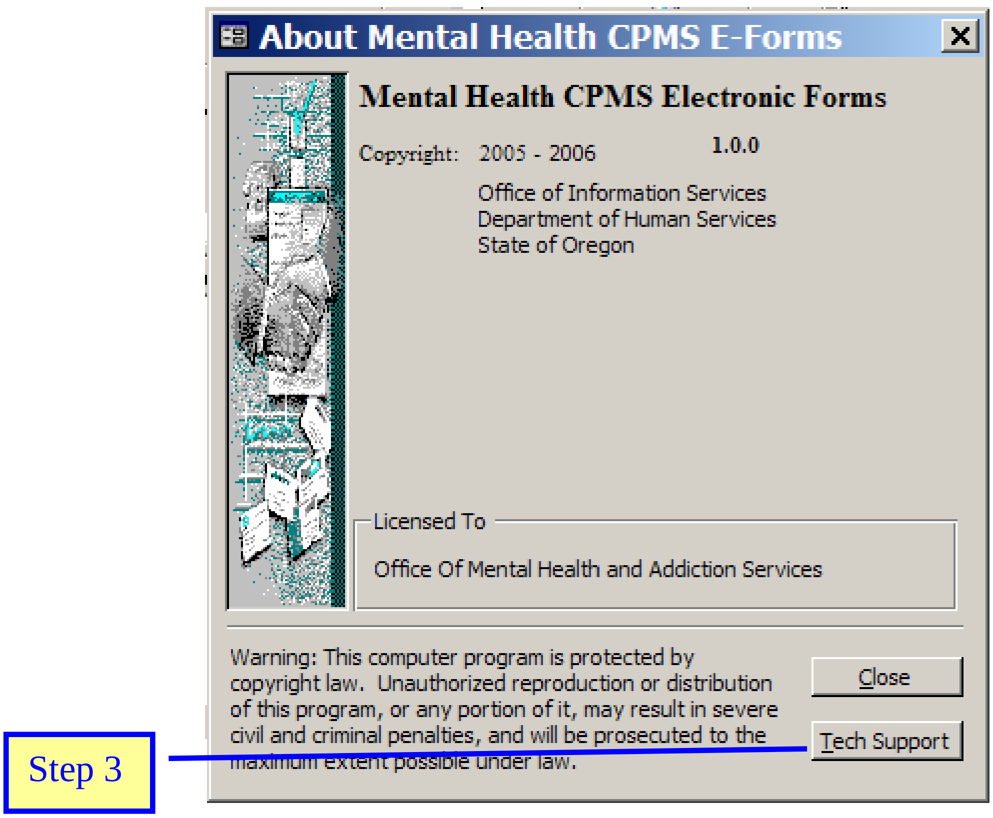
Technical Support



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

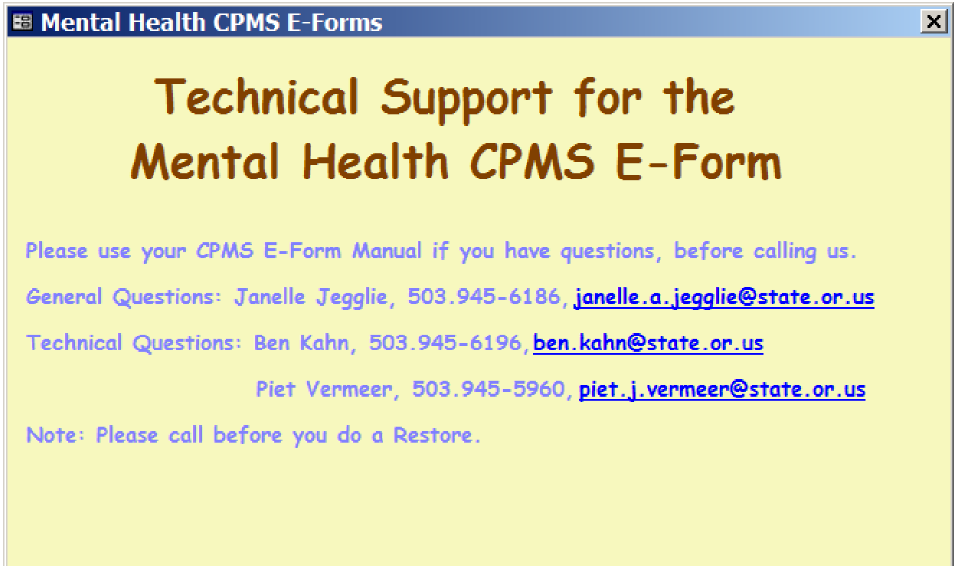
Step 2 Select **About CPMS Electronic Forms Help**.

The following form will open.



Step 3 Click **Tech Support**.

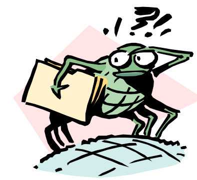
The following form will open.



Note: Click the X in the upper right corner of the box to close. Then click OK to close the Help Window.

Appendices

Frequently Asked Questions



Q: If we use the Mental Health CPMS E-form, do we still need to keep a copy of the paper 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 putting in a highest grade completed of 30. Why?

A: The CPMS E-form has built-in edits that prohibit inaccurate responses. For a complete list, see page 84.

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

A: OMHAS 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 OMHAS?

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

Q: What e-mail address do we use?

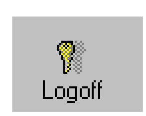
A: The address is cpms.oasis@state.or.us

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 OMHAS 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?

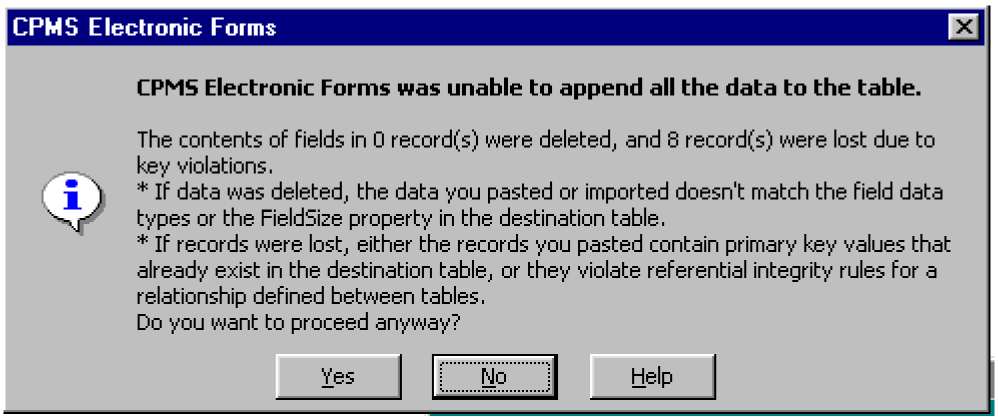
A: When you are back at the **Client Center**, just select the  button from the upper right corner of the application.

Troubleshooting

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

    Your video settings must be 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 OMHAS first. Also, Contact OMHAS prior to doing a Restore.

Practice Labs

Lab 1 – Enroll client data

1. Enter at least 1 Basic or Residential Services form using either the description or codes version.
   a) Start at the **Client Center**
   b) Choose **Enrollment**▼
   c) Choose **Basic**
   d) Enter data from sample form (page 69)
   e) When finished filling out a form, close the form and return to the Client Center.

2. Enter at least 1 Evaluation Services form using either the description or codes version.
   f) Start at the **Client Center**
   g) Choose **Enrollment**▼
   h) Choose **Evaluation**
   d) Enter data from sample form (page 72)
   i) When finished filling out a form, close the form and return to the Client Center.

3. Enter at least 1 Pre-Commitment form using either the description or codes version.
   a) Start at the **Client Center**
   b) Choose **Enrollment**▼
   c) Choose **Pre-Commitment**
   d) Enter data from sample form (page 75)
   e) When finished filling out a form, close the form and return to the Client Center.

4. When finished entering 1 of each type of form, go back to Enrollment and practice entering more enrollment forms.

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 of 16
   - All clients have a Employable or Working Now
   - 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
   - A few of your clients are Court referrals

   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 the Diagnostic Impression
   - Change the date of birth
   - Change Source of Household Income
   - Change the opening date to 1950

Lab 3 – Terminate Clients

(Use previously entered client data)

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

Lab 4 – Terminate Clients that are not in the system

(Use sample forms from the following pages)

1. Terminate Basic or Residential Clients
    a) Choose **Terminate Client** from Client Center.
    b) Choose **Basic**.
    c) Fill out form (using the sample forms pages 81 - 83)
    d) Close form by clicking the X in the upper right corner of the Form.

Mental Health CPMS E-form Edits

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

Enrollment Form Edits

- E-Forms should look similar to the paper forms. On the MH forms, the only color is the upper left hand corner.
- 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.
- Prime Number (29) should allow for alpha and numeric characters and be 8 characters long.
- 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 the age of the client. Date of Birth must be less than or equal to the Open Date.
- 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 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).
- The default value should be “00” when no answer is provided (after they tab through the box) for some fields like referral codes (15), Education (13), Income (17), Dependents (23) other than client.
- If Employment Status (25) is 1 Full Time or 2 Part Time, Employability Factor (33) should default to 0.
- Diagnostic Impression (92) (120) should not allow the primary and secondary to be the same.
- Diagnostic Impression (92) (120) secondary can be blank, maybe allow for “00” but put blank in the ascii text string.
- Level of Functioning (75) should allow for a 3-digit code.
- CGAS (75) should allow for a Y or N.

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).
- 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).
- Case number (7) is numeric only and must be six digits long. Use leading zeros when necessary. Case number can’t be ‘000000’.
- 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’.
- The default value should be “00” when no answer is provided for some fields like referral codes (53), Education (51), Income (56) once you table through them.
- 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,* 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).
- 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 Martial Status (21) is 2, 3, 4, or 5 on enrollment form, then it can't be 1 on the termination form.
- If the client is under age 18 at enrollment, then they must fill out boxes 112, 113, 114.
- If the client is 18 or over at enrollment, then boxes 112, 113, and 114 should be grayed out.

Evaluation Form

- Report Unit (85) should default to "01" but be changeable.

Pre-Commitment Form

- If Hearing Recommended (97) is not equal to 4, 5 or 6, then gray out boxes 99, 118, 100, and 101 and leave them blank.
- If Disposition by Judge (99) is not equal to 3 or 6, then gray out boxes 118, 100, and 101 and leave them blank.
- The Opening Date (5) should be equal to or after the Date of Petition (94).

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Things to remember from the MH CPMS Eform Training:

OMHAS CPMS MH E-form Training

Participant Evaluation Form

Location: ____________________

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 Materials, concepts and knowledge were relevant and comprehensive	**1**	**2**	**3**	**4**	**5**
TRAINER/PRESENTER ABILITY Trainers/presenters were organized, informative, and prepared.	**1**	**2**	**3**	**4**	**5**
APPLICATION TO PRACTICE The software and information presented will be easily implemented into my job duties.	**1**	**2**	**3**	**4**	**5**
TEACHING AIDS Training materials, handouts examples, and audio visual aids were helpful.	**1**	**2**	**3**	**4**	**5**
CLASS PARTICIPATION Discussion and feedback were appropriate and sufficient.	**1**	**2**	**3**	**4**	**5**

WHAT I STILL DON'T UNDERSTAND IS….

PLEASE SHARE YOUR COMMENTS