

CEI
Case Management PRO

USER'S GUIDE

Web Address: **PurposefulParenting.casemngntpro.com**

LOGGING IN

You will be issued a User Name and Password. Your password is case sensitive.

1. Type in your User Name
2. Hit Tab (to move to the Password field)
3. Type in your password
4. Hit Enter or Click Verify
5. **If you are inactive for more than 20 minutes the system will make you login again.**
6. You will have to change the password every 90 days. It cannot be the 2 previous passwords

CEI Case Management PRO

Please Enter User Name and Password

User Name

Password

Verify

Invalid user and password error

If your User Name or Password is incorrect, you will get an error message listed next to verify. Please check your User Name and Password and try again. Check to make sure that your CAPS LOCK is not turned on. Remember, your password is case sensitive.

CLIENT DATA

Client Data

When you first log in you will be taken to the Client Data Form. You can choose your case from the Name drop down box or by entering the Case Number in the "By Case" Text box. Once you have entered this, click the Find button.

Case Management PRO

Client Data	Input Time/Progress Notes	Treatment Plan	Monthly	Reporting	Misc	Log Out
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Client Data

Select case By Name By Case

Case No	<input type="text"/>	Address	<input type="text"/>
First Name	<input type="text"/>	City	<input type="text"/>
Last Name	<input type="text"/>	State	<input type="text"/>
Ref Type	<input type="text" value="Ref.Type ??"/>	Zip	<input type="text"/>
Referral Source	<input type="text" value="Referral ??"/>	County	<input type="text" value="County ??"/>
2nd Referral Source	<input type="text" value="Referral ??"/>		

- AAbb, Aaa
- Able, Maureen
- Alvarez, Briyana
- Anderson, Oscar
- Anderson, Felician
- Andersons, Alexar
- Andrews, Davion
- Andy, Triston
- andy, adny
- Armour, Bob
- stact stact

(If you see any problems call the office and they will make the corrections.)

MEMBER

Member Data

When viewing members:

1. Choose the client by the Name dropdown , Then click Find –OR–
2. Enter the Case number, and then click on Find.
3. The Members for that case will be listed in the Select Member Pane.
4. Click on one of the Members in the list and their data will be displayed.

Case Management PRO

Client Data	Input Time/Progress Notes	Monthly	Reporting	Forms	Log Out
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Member Data

By Name

By Case

Select Member <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"> Triston Andy Amy Triston Susie Triston </div>	First Name <input style="width: 100%;" type="text" value="Triston"/> PersonalID# <input style="width: 100%;" type="text" value="1091204120"/> DOB <input style="width: 100%;" type="text" value="03/22/1996"/>	Last Name <input style="width: 100%;" type="text" value="Andy"/> Gender <input style="width: 100%;" type="text" value="Male"/> Language <input style="width: 100%;" type="text" value="English"/>	Relationship <input style="width: 100%;" type="text" value="Self"/> Race <input style="width: 100%;" type="text" value="White"/>
Emergency Contact <input style="width: 100%;" type="text"/>	Phone <input style="width: 100%;" type="text"/>	<input type="checkbox"/> Child- Monthly <input type="checkbox"/> Parent - Monthly <input type="checkbox"/> Adult Child <input type="checkbox"/> Legal Guardian <input type="checkbox"/> Parents Live Together	Day Phone <input style="width: 100%;" type="text"/> Cell Phone <input style="width: 100%;" type="text"/> School <input style="width: 100%;" type="text" value="DEmote"/>

When adding a new member, some fields are required which are highlighted below. You will not be able to update your record until these fields are filled in.

1. First Click on Insert to clear the form to add the member.
2. As you are adding a new member, you can use your tab key to move from field to field.

Drop-Down Boxes:

When you get to fields that have a dropdown arrow, you are required to choose one of the choices listed. You have 3 choices to do this:

1. You can click on the drop-down arrow and choose.
2. If you know that it's the mother, you can also type and "M" and it will automatically fill in the first entry that begins with an "M". If is not the first entry, you will need to click on the down arrow and choose.
3. You can also click the down arrow on your keyboard until the choice that you want shows in the dropdown box.

Check Boxes:

When you get to fields that have check boxes, you can click on the box and it will check (click again and it will uncheck). If you are tabbing through the fields, you can hit the spacebar and it will check the box.

Date Fields:

When you have to fill in a date field, you can type in the date. It will automatically take you to the next date area. If you need to see a calendar, you can click on the calendar icon next to the date and it will show you a calendar. Use the left and right arrows next to the month at the top to navigate.

CEI
Case Management PRO

Client Data	Input Time/Progress Notes	Monthly	Reporting	Forms	Log Out
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Member Data

By Name By Case

Select Member

- Triston Andy
- Amy Triston
- Susie Triston

First Name	Triston	Last Name	Andy	Relationship	Self
PersonalID#	1091204120	Gender	Male	Race	White
DOB	03/22/1996	Language	English	<input type="checkbox"/> Child- Monthly	
Emergency Contact		Phone		<input type="checkbox"/> Parent - Monthly	
Day Phone		Evening Phone		<input type="checkbox"/> Adult Child	
Cell Phone		Email		<input type="checkbox"/> Legal Guardian	
School	DEmote	Grade		<input type="checkbox"/> Parents Live Together	

Make sure to Hit Clear/Insert before you enter a new member

Save:

Click Save after you make changes to an existing member or if you have added a new member to save your changes. Edits will be applied. If you are missing any data, you will see an error message. If the edits pass, you will see a Message that says the member has been updated or inserted.

Member Data

Member Updated

Case Management PRO

Client Data	Input Time/Progress Notes	Monthly	Reporting	Forms	Log Out
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Find Case Case Name Subject

60608 | Abner,Bill

Please click on browse to find file

Attachments

Attachments:

To add an attachment to a case chose attachment from the client menu:

1. Choose your case.
 - a. That will fill in the Case Nrb , Name and Subject
2. Click on Browse to find the PDF you want to add.
3. Click on Upload.
4. You will then see your file listed under the attachment section.
5. You can then click on it to see the document.

Treatment Plan

The Treatment plan has 2 menu items.

1. Treatment Plan. This is where you will be entering your main treatment data, along with your goals and objectives.
2. Treatment Details. This form will be used to display a list of all your treatment plans and their status. This is very similar to your monthly detail.
3. Treatment Plan Report. This will be the form you will use to get signatures and to print your Treatment plan Report.

Treatment Plan

To add a new treatment plan:

1. First you must check to see if a treatment plan has already been entered for that Case/Member.
 - a. Select the Case, then the member Click on Find.
 - b. You should receive a message
 - c. No Treatment Found and your screen should expand to see additional fields.
 - d. At any point you can expand or collapse your main data by clicking on the + main or – main button. This will allow you to see your goals and objectives without scrolling

The screenshot shows the 'Treatment Plan' form. At the top right, there are three buttons: '+ Main', '- Main', and '+ All Goals'. Below these, there are two dropdown menus for 'Case' and 'Member', each with a 'Find' button next to it. A 'Save' button is also visible. The form includes fields for 'Date', 'Review Date', and 'Status' (with options C(comp), R(review), F(final)). There are also buttons for 'Comp', 'Use Current', 'Print', and 'Delete'. A blue bar at the bottom is labeled 'Main Data..'

Your screen will now look like this.

1. Enter in your data then Click on Save
 - a. Date
 - b. Review Date
 - c. Any Main Data
2. You should get a message Treatment Plan Header Updated.
3. **DO NOT CLICK ON ADD GOALS UNTIL YOU SAVE THE HEADER DATA**

The screenshot shows the 'Treatment Plan' form after data entry. The 'Case' dropdown is set to 'Smith, John' and the 'Member' dropdown is also set to 'Smith, John'. The 'Find' button is now disabled, and the 'Case No' field shows '725'. The 'Save' button is highlighted with a red box. The 'Date' field is set to '01/01/2016'. The 'Review Date' field is empty. The 'Status' field is set to 'C(comp)'. There are buttons for 'Comp', 'Use Current', 'Print', and 'Delete'. A blue bar at the bottom is labeled 'Main Data..'. Below this bar, there is a 'Comments' section with a text area containing 'DSM 5 Diagnostic:'.

Treatment Plan Goals and objective.

1. Click on the - Main Button. This will make it easier to see the goal section

Treatment Plan **Treatment Plan Header Updated**

Case: Member: Find Case:

Category:

Date: Review Date: Status: -C(comp) R(review) F(final)

Main Data..

Employee	TreatPlan	Edit
There are no records available.		

Add New - Records: 0 - 0 of 0 - Pages: 1

To use one of the Templates, choose your template and then click on Add Goals

Treatment Plan

Case: Member: Find Case No:

New Treatment Date:

Date: Review Date: Status: -C(comp) R(review) F(final) Use Current

Main Data..

That will populate your treatment plan with the goals and objectives from that template. Click on the + sign by your name to expand the objectives.

Employee	TreatPlan	Edit
CMPAdmin	Reduce overall level, frequency, and intensity of the anxiety so that daily functioning is not impaired.	Edit Delete

Objective	Date Est	Target	Achieved	Edit Delete
Develop an awareness as to the short/long term effects of anxiety				Edit Delete

Records per page: 100

Add New - Records: 1 - 1 of 1 - Pages: 1

To add an additional goal, Click on add new.

Client Data | Input Time/Progress Notes | NCFAS | Monthly | Reporting | Forms | Log Out

Treatment Plan

By Name Find + All [Treatment Plan](#) [Print](#)

EmpName	Problem	Goal	Actions	Responsibility	Edit
There are no records available.					

[Add New](#) Records: 0 - 0 of 0 - Pages: 1

The following form will be displayed. Choose your name from the Drop Down box, Enter in your goal Then click on save.

Goal ID:

Employee

Goal:

[Save](#) [Cancel](#) - Records: 1 - 5 of 5 - Pages: 1

Continue this process until all goals have been entered.

Click on the + sign by your name to expand or add the objectives. Click Add New

Objective Date Est Target Achieved

Develop an awareness as to the short/long term effects of anxiety [Edit](#) [Delete](#)

Records per page: [Add New](#) - Records: 1 - 1 of 1 - Pages: 1

The following form will be displayed. Enter your objective, the date it was established and the target date. All dates should be mm/dd/yyyy Then click on save.

[Main Data..](#)

Employee TreatPlan [Edit](#)

CMP Admin Reduce overall level, frequency, and intensity of the anxiety so that daily functioning is not impaired. [Edit](#) [Delete](#)

Objective Date Est Target Achieved

Develop an awareness as to the short/long term effects of anxiety [Edit](#) [Delete](#)

My own objective is to... 1/1/2016

Records per page: [Save](#) [Cancel](#) - Records: 1 - 1 of 1 - Pages: 1

Editing your Goals and or Objectives.

To edit a goal or objective click on edit, make your changes then click on update.

Treatment Plan Goal Copied

Case Member Case

Category

Date Review Date Status -C(comp) R(review) F(final)

Main Data..

Employee	TreatPlan			
CMPAdmin	Reduce overall level, frequency, and intensity of the anxiety so that daily functioning is not impaired.	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>	
Objective	<input type="text" value="Develop an awareness as to the short/long term effects of anxiety"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
		<input type="button" value="Update"/>	<input type="button" value="Cancel"/>	

Records per page: - Records: 1 - 1 of 1 - Pages:

Updating your Treatment Plan.

1. When Reviewing and updating a New Treatment plan (ie Every 90 days) you will need to do the following
 - a. Make sure all the data is correct for the current plan. (You will not be able to change them after the copy is complete)
 - b. Enter the new Treatment Date
 - c. Click on copy treatment.
 - d. This will change the treatment plan date and Clear all Signatures.
 - e. You will now need to make any changes , add /delete goals etc.....
 - f. To print/View a previous Treatment plan, Click the drop down where you see "Use Current" and choose the Previous treatment plan

Treatment Plan Goal Copied

Case Member Case

Template New Treatment Date

Date Review Date Status -C(comp) R(review) F(final) Use Current

Main Data..

Treatment Plan Details.

This form works just like the monthly details. Click on the case id to bring up the Treatment Plan

Treatment Plan Detail

[Back to Previous Page](#)

Select Staff

<u>Client FirstName</u>	<u>Client Last Name</u>	<u>Case No</u>	<u>Date</u>	<u>Status</u>	<u>#Days since Upd</u>	<u>Case Id</u>
Clinton	<input type="text"/>	1617	7/12/2013	C	95	1617

Printing

- To print the Current Treatment Plan, Choose "Use Current" . Then click Print.
- To print a previously treatment Plan , Choose the date from the dropdown and then click on Print. This will bring up a previously saved Treatment Plan.

Treatment Plan Goal Copied + Main - Main + All Goals

Case Member Case No

Template New Treatment Date

Date Review Date Status -C(comp) R(review) F(final) Use Current

Main Data..

Your report will something like this



Your Company
Name

Case #	725
Client	John Smith
Date	3/1/2016
Review Date	

Diagnosis (DSM IV)

DSM 5 Diagnostics The Diagnostic is that John Needs Help

Past Tx/Current Meds

Depressed

Presenting Problems

None

Client Strengths/Supports

Therapy

Treatment Strategies

Family

Intervention Type/Frequency:

NOne

Discharge Criteria:

Happy

Aftercare Plan:

None

Goals and Objectives

Goal #1 Reduce overall level, frequency, and intensity of the anxiety so that daily functioning is not impaired.

Goals and Objectives

Goal #1 Reduce overall level, frequency, and intensity of the anxiety so that daily functioning is not impaired.

Objective	Staff	Date Est	Target	Achieved
Develop an awareness as to the short/long term effects of anxiety	CMPAdmin			
My own objective is to...	CMPAdmin	01/01/2016		

<input checked="" type="checkbox"/>	Clients Signature	Date:
<input checked="" type="checkbox"/>	Guardian/parent Signature	Date:
<input type="checkbox"/>	Therapist	Date:

This information has been Disclosed to you from records protected by federal confidentiality rules (42 CFR Part 2). The federal rules prohibit you from making any further Disclosure of this information unless further Disclosure is expressly permitted by the written Consent of the person to whom it pertains or as otherwise permitted by 42 CFR Part 2. A general authorization for the release of medical or other information is NOT sufficient for this purpose. The Federal rules restrict any Use of the information to criminally investigate or prosecute any alcohol or drug abuse client.

Signatures

1. Client and Guardian/Parent
 - a. Click on X , The Following Form will be displayed.
 - b. Use your mouse to sign in the box,
 - c. Click on Save.
 - d. IF the Client does not like their signature. Click clear and try again.

MrNo 1

Signature
Client


Your Sign



Signature OK. 


Save Clear 1

The Report should now have their signature and today's date.

<input checked="" type="checkbox"/>	Clients Signature		Date: 3/2/2016
<input checked="" type="checkbox"/>	Guardian/parent Signature		Date:
<input type="checkbox"/>	Therapist		Date:

2. Therapist
 - a. Enter the date and then Click on the X your signature will be extracted from your employee signature on file (see Page 35)

INPUT TIME/PROGRESS NOTES / Visitation



Sup. Client Data	Assignments	Input Time/Progress Notes	Treatment Plan	Visitation	Monthly	Reporting	Forms	Log Out
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Case Notes | [TimeSheet](#)

Date Status

Begin Time End Time Mins Hours Travel Mileage

Case	Case Name	Service	Referral	Hours Left	Service End Date
<input type="text" value="1007"/>	<input type="text" value="Moore,Gary"/>	<input type="text" value="TS-FTF"/>	<input type="text" value="RF0001408402"/>	<input type="text" value="28"/>	<input type="text" value="06/30/2015"/>

Check Box to Select Member

Others Present

Location

Method

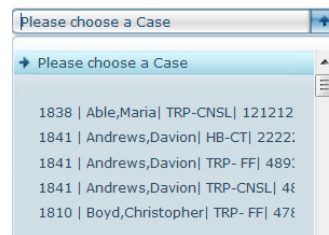
Goals

Monthly

Notes

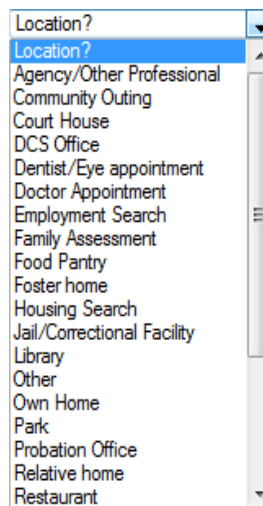
1. Click on Input Time/Progress Notes.
2. Type in the date.
 - a. You have the option of clicking on the calendar
3. Type in your begin time.
 - a. If it is less than 10, type a zero first i.e. 06, this will automatically move you to the next field.
 - b. You will need to put AM or PM.
 - i. An A or a P will do the trick.
4. Type in your end time.
 - a. If it is less than 10, type a zero first (06), this will automatically move you to the next field.
 - b. You will need to put AM or PM.
5. The minutes and hours will calculate.
 - a. This is done per ¼ hour.

6. Click on the down arrow and choose the Case.
 - a. This will Display the Case Name.
 - b. This will display the referrals.
 - c. This will also show you the remaining hours left on the referrals and End Date of the Referral.
 - d. If you choose a Service that requires a visitation note Skip to the Visitation section Page 19.

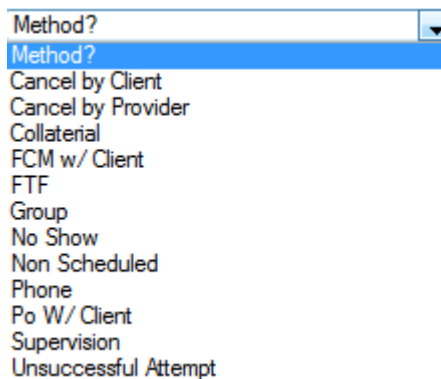


7. To Choose the Members Present, Click on the member’s checkbox.

8. Click on the down arrow and choose the Location.



9. Click on the down arrow and choose the Method.



Goals

Treatment Plan Goal? Monthly

Notes

10. If you have entered in your treatment plans and/or Objective, Click the dropdown , choose the treatment plan and then click the + Sign. This will add the goal into the textbox. If you need to add additional data you can do that also.
11. If you want this progress note to be displayed in the monthly click the Checkbox called monthly. This is very important if you want this note to display on the monthly report. The system will match the Case , Service and treatment plan Goal you enter here and then the same on your monthly. See monthly report for more details...
12. Add the Notes.
13. Click on Save.
 - a. You will get a message Record Save. Do not continue until you see this message!

Expand the Dialog Box:

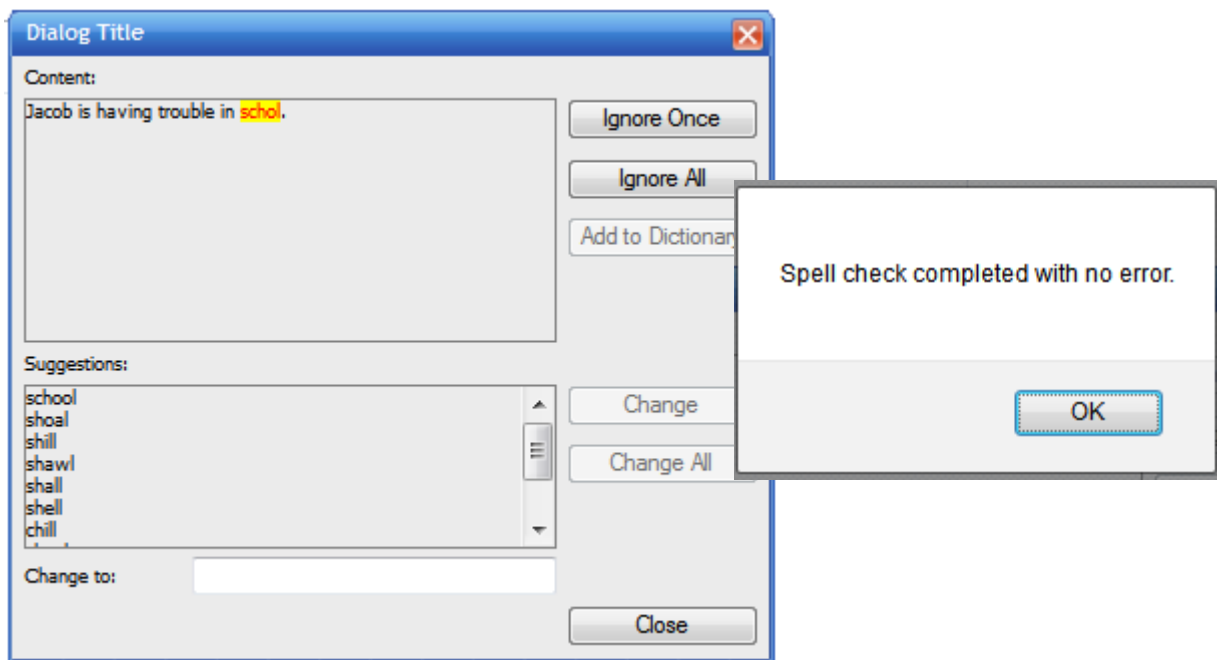
If you see a series of dots in the lower right hand corner of a dialog box that means you can expand the box to see more of you data.

1. Point to the dots.
2. Your mouse will turn into a double headed arrow.
3. Click and drag down until the dialog box is large enough to see all your text.
4. Text Boxes have character limits. If you see something like ***** 8000 Characters**, you will need to reduce your characters to less than 8000 to be able to save.

The image shows a screenshot of a software interface with two text input fields. The top field is labeled "Goal Addressed" and the bottom field is labeled "Notes". Both fields have a small icon of three dots in the bottom right corner, which is highlighted with a red box, indicating that the text boxes can be expanded.

Spell:

You should run a spell check on your form before you add it. It will give you a dialog box to correct any errors, or simply tell you it's complete with no errors.



Visitation Notes:

When you choose a service that requires a visitation Note the bottom portion of the form will look like this.

You must enter the following data.

1. ALL fields are mandatory
2. Once Complete click the save button like normal notes.
3. To print your visit note. Click Visit Report. This will take you to the Visit Report where you can print your Report.

Location of Visit (location, and level of supervision)

Attendance at Visit (include time of arrival and departure of all parties for the visit)

Observation Narrative Include the following:

- Greeting and departure interaction between parent and child(ren);
- Planned activities by the parent for visit;
- Interventions required, if any and parent's response to direction provided with regard to interventions;
- Ability and willingness of parent to meet child's needs as requested by child or facilitator;
- Tasks given to the parent to be completed prior to or at the next visit, ect.

Observed Strengths (include positive interactions between parent and child)

Observed Issues (include an violations of visitation guidelines or safety plan, any coaching points for caregiver to improve upon; emotional/behavioral issues of child; bonding and attachment concerns)

Recommendation (include recommendation regarding level of supervision of follow up visits based on on-going demonstration of


After you return from printing your report, if you want to add another record you must hit the clear button.

Case Notes | Save | **Clear** | Delete | Spelling | Update MTH | TimeSheet

Date: / / | Status:

Timesheet:

Click on Timesheet to see a listing of your input time.



Client Data	Input Time/Progress Notes	Monthly	Reporting	Forms	Log Out
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Case Notes | **TimeSheet**

Date:

Begin Time: End Time: Mins: Hours: Travel: Mileage:

Case: Case: Case Name: Service: Referral: Hours Left:

Others Present: Members Present:

Location:

[Back to Previous Page](#) George Junior Republic of Indiana

Name: Begin Date: End Date:

Date	Begin Time	End Time	CaseNo	Case Name	Service	loc	Method	Bill Hours	Non Bill Hours	Detail
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2272
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2273
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2274
6/2/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2275

Grand Total

Total Billable	Total Non Billable	Tot Mileage
0	4	

Delete Input Time:

If you made a mistake and you want to delete the time record, find the record on the time sheet and click on the Detail record id and you will be taken to the input time/progress notes. Click the Delete button. You will then get a message that the record has been deleted.

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Sup. Client Data	Assignments	Input Time/Progress Notes	Treatment Plan	Visitation	Monthly	Reporting	Forms	Log Out
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Case Notes | Save | Clear | **Delete** | Spelling | Update MTH | [TimeSheet](#)

Date: / / Status:

Begin Time: : End Time: : Recalc Mins: Hours: Travel: 0 Mileage: 0

1007 | Moore,Gary | TS-FTF | RF0001408402|28|12|06/30/2015

Case	Case Name	Service	Referral	Hours Left	Service End Date
1007	Moore,Gary	TS-FTF	RF0001408402	28	06/30/2015

Check Box to Select Member

Others Present **Members Present** Gary Moore

Location Location? ↓

Method Method? ↓

Goals

Treatment Plan Goal? ↓ Monthly

Objective? ↓ +

+

Notes

Edit Detailed Entry:

You can edit your detailed entry by clicking on the numbers located under detail in the entry. This will take you back to the Input form but it will now display that record and allow you to update any information.

[Back to Previous Page](#)

George Junior Republic of Indiana

Name : Begin Date End Date

Date	Begin Time	End Time	CaseNo	Case Name	Service	loc	Method	Bill Hours	Non Bill Hours	Detail
6/1/2013	11:00 AM	11:30 AM	1838		TRP-CNSL	Park	Cancel by Client	0	1	2272
6/1/2013	11:00 AM	11:30 AM	1838		TRP-CNSL	Park	Cancel by Client	0	1	2273
6/1/2013	11:00 AM	11:30 AM	1838		TRP-CNSL	Park	Cancel by Client	0	1	2274
6/2/2013	11:00 AM	11:30 AM	1838		TRP-CNSL	Park	Cancel by Client	0	1	2275

Grand Total

Total Billable	Total Non Billable	Tot Mileage
0	4	

Case Management PRO

Click Save when you have made all your changes.

Client Data | **Input Time/Progress Notes** | Monthly | Reporting | Forms | Log Out

Case Notes

Date Status

Begin Time End Time Mins Hours Travel Mileage

Case Case Case Name Service Referral Hours Left

Others Present Members Present

Location

Method

Notes

Update data needed for the Monthly

You can correct the following data after Timesheets have been completed:

- 1. Checkbox Monthly
- 2. Notes
- 3. Goals
- 4. Treatment Plan Goal.
- 5. Click on Update MTH

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Sup. Client Data	Assignments	Input Time/Progress Notes	Treatment Plan	Visitation	Monthly	Reporting	Forms	Log Out
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Case Notes | Save | Clear | Delete | Spelling | **Update MTH** | **TimeSheet**

Date: / / Status:

Begin Time: : End Time: : Recalc Mins: Hours: Travel: 0 Mileage: 0

1007 | Moore,Gary | TS-FTF | RF0001408402 | 28 | 12 | 06/30/2015

Case	Case Name	Service	Referral	Hours Left	Service End Date
1007	Moore,Gary	TS-FTF	RF0001408402	28	06/30/2015

Check Box to Select Member

Others Present

Members Present Gary Moore

Location

Method

Goals

Treatment Plan Goal?

Objective?

Monthly
+
+

Notes

MONTHLY

Monthly Reporting

Case Management PRO

Client Data	Input Time/Progress Notes	Monthly	Reporting	Forms	Log Out					
Select Emp	Select a Empl ...	Case	Select a Case ...	Date	Select a Date ...	Find	-	+	Spell	Print
Insert Case	Insert Case?	Date	/ /	Insert	Copy				Copy	
Next Visit	/ /	Date	/ /	Status	-C(comp) R(review) F(final)	Save	Delete	Complete		

Reason for Referral and Presenting Issues:

1. Click on Monthly:
 - a. Choose Monthly Reporting.
 - b. The Monthly reporting has two sections:
 - c. The top section is for the main monthly information.
 - d. The second section is for your goals. You can have multiple goals for each month.

2. When you are starting off with a **new** case for a **new** month:
 - a. Choose the case from the Insert Case Drop Down
 - b. Type in the date. You have the option of clicking on the calendar.
 - c. Type in the date of the next visit. You have the option of clicking on the calendar.
 - d. Type in the Reason for Referral and Presenting Issues.
 - e. Type in Family Functional Strengths.
 - f. Type in Overall Recommendation and Progress Summary.
 - g. Then click on the Insert button.
 - h. You should get a message that says the Monthly Report has been Inserted.

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Admin Client Data	Assignments	Input Time/Progress Notes	Monthly	Reporting	Forms	Back To Admin	Log Out
Select Emp	<input type="text" value="Select a Empl ..."/>	Case	<input type="text" value="Select a Case ..."/>	Date	<input type="text" value="Select a Date ..."/>	<input type="button" value="Find"/> <input type="button" value="-"/> <input type="button" value="+"/> <input type="button" value="Spell"/>	<input type="button" value="Print"/>
Insert Case	<input type="text" value="Able, Maureen"/>	Date	<input type="text" value="06/01/2013"/>	<input type="button" value="Insert"/>	Copy	<input type="text" value=""/>	<input type="button" value="Copy"/>
Next Visit	<input type="text" value="07/06/2013"/>	Date	<input type="text" value="/ /"/>	Status -C(comp) R(review) F(final)	<input type="checkbox"/>	<input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Complete"/>	
Reason for Referral and Presenting Issues:							
<input type="text" value="The Client is having problems at school"/>							
<input type="text" value=""/>							
Family Functional Strengths							
<input type="text" value="Family is Very close"/>							
<input type="text" value=""/>							
Overall Recommendation and Progress Summary							
<input type="text" value="Needs Therapy."/>							
<input type="text" value=""/>							
DCS Service Goal							
<input type="button" value="Prev"/>	<input type="button" value="Next"/>	<input type="button" value="Save"/>	<input type="button" value="Insert"/>	<input type="button" value="Delete"/>			

Adding Goals:

1. Type in the Treatment Service Goals.
2. Choose The Referral.
3. If you enter in a treatment plan you can choose the goal and click on the + To add it to the Goal text box. (this is just like the Progress Notes).. If you want your notes from your Timesheet, then this will need to be the same service / treatment plan goal that you entered on your Input Time/Progress Notes.
4. Type in the Narrative Discussion of Services provided for this goal during the month.
5. Type in Progress Summary toward Goal.
6. Type in Family Cooperativeness.
7. Type in Recommendations Regarding Services for Goal.
8. Click on Save.

DCS Service Goal

Prev Next 0 Goals Save Clear/Insert Delete

Service Referral?

Treatment Service Goal

Treatment Plan Goal? +

Narrative Discussion of Services Provided for this Goal During Month:

Progress Summary Toward Goal:

Family Cooperativeness:

Recommendation Regarding Services for Goal

Inserting another Goal:

1. Click on Insert to Add a New Goal. This will just clear your screen to add the next goal.
2. Choose the Service from the dropdown box.
3. Type in the Treatment Service Goals.
4. Type in the Narrative Discussion of Services provided for this goal during month.
5. Type in Progress Summary toward Goal.
6. Type in Family Cooperativeness.
7. Type in Recommendations Regarding Services for Goal.
8. Click on Save.

Deleting Goals:

Click on the Delete Goal button. The goal will be deleted.

DCS Service Goal

Prev Next Save Insert **Delete**

Service Service? ▾

Treatment Service Goal

Narrative Discussion of Services Provided for this Goal During Month:

Delete Monthly Report:

Click on Delete in the top section of the form. This deletes the Monthly report and all goals.

Select Emp Case Date Find - + Spell Print

Insert Case Able, Maureen Date 06/01/2013 Insert Copy Copy

Next Visit 07/06/2013 Date / / Status -C(comp) R(review) F(final) Save **Delete** Complete

Reason for Referral and Presenting Issues:

The Client is having problems at school

Family Functional Strengths

Family is Very close

Complete Monthly Report:

Once you have added your monthly report and all your goals, you will want to click on Complete so that it will be routed to your supervisor so they can finalize it. This will change the status to a "C" when you look at it in the Monthly Detail.

Select Emp	<input type="text" value="Select a Empl ..."/>	Case	<input type="text" value="Select a Case ..."/>	Date	<input type="text" value="Select a Date ..."/>	Find	-	+	Spell	Print
Insert Case	<input type="text" value="Able, Maureen"/>	Date	<input type="text" value="06/01/2013"/>	Insert		Copy	<input type="text"/>	Copy		
Next Visit	<input type="text" value="07/06/2013"/>	Date	<input type="text" value="/ /"/>	Status	-C(comp) R(review) F(final)	Save	Delete	Complete		

Reason for Referral and Presenting Issues:


The Client is having problems at school

Family Functional Strengths

Family is Very close

Copy a Monthly Report:

1. First select the case from the Insert Case Dropdown.
2. After you choose the case, the copy dropdown box will be populated with the previous months for that case.
3. Enter the **new** month in the date field.
4. Choose the month you want to copy from the Copy dropdown box.
5. Click Copy.
6. The form will be populated with that monthly's data. You will have to supply the Next Visit and make changes to any of the Text Boxes.
7. Then Click update.
8. Make sure you go to your service goals and make any changes to the goals for that month.



Admin Client Data	Assignments	Input Time/Progress Notes	Monthly	Reporting	Forms	Back To Admin	Log Out
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Select Emp Mo Case Able, Maureen Date Select a Date ... Find + Spell Print

Insert Case Able, Maureen Date 10/01/2013 Insert Copy

06/07/13
 06/14/13
 08/01/13
 09/01/13

Next Visit 07/06/2013 Date / / Status -C(comp) R(review) F(fina) Complete

Reason for Referral and Presenting Issues:

The Client is having problems at school

Family Functional Strengths

Family is Very close

Overall Recommendation and Progress Summary

Needs Therapy.

DCS Service Goal

Prev Next Save Insert Delete

Service Service?

Treatment Service Goal

Monthly Detail:

2. Click on Monthly and Choose Monthly Detail.
2. Make note of the Status:
 - a. Once you mark your Monthly Report complete a "C" will appear under status.
 - b. If your supervisor has rejected your report it will show an "R".
3. Click on the case number to see the actual Monthly Report.

CEI Case Management PRO

Admin Client Data	Assignments	Input Time/Progress Notes	Monthly	Reporting	Forms	Back To Admin	Log Out
-------------------	-------------	---------------------------	----------------	-----------	-------	---------------	---------

Monthly Status Detail

Please Choose a Staff

Begin Date:
 End Date:
 Staff:

Client FirstName	Client Last Name	Case No	Date	Status	Mth Case Id
Bob	Hill	1862	6/7/2013	C	1862
Maureen	Able	1838	6/14/2013		1838
Maureen	Able	1838	8/1/2013		1838

Supervisor Review:

After you have marked your Monthly report complete, your supervisor will review it. They will either mark it "F" for Finalized and it will be extracted when they do the monthly reporting or they will mark it with an "R" for Review which means you need to make some changes. When a supervisor rejects your report they will make notes in the area that needs modifying.

Case Management PRO

Admin Client Data	Assignments	Input Time/Progress Notes	Monthly	Reporting	Forms	Back To Admin	Log Out
-------------------	-------------	---------------------------	---------	-----------	-------	---------------	---------

Monthly Status Detail

Please Choose a Staff

Begin Date:
 End Date:
 Staff:

Client FirstName	Client Last Name	Case No	Date	Status	Mth Case Id
Bob	Hill	1862	6/7/2013	R	1862
Maureen	Able	1838	6/14/2013	F	1838
Maureen	Able	1838	8/1/2013	F	1838

Rejected Report:

If you click on the case number of a rejected report, you will go to the actual report. If a report has been rejected, the supervisor will have made comments. The comments will show up in pink beneath your notes. You can't change the comments, but you can copy and paste them. If you don't see comments, click on the + sign to make them show.

1. Make you changes.
2. Click Update (if you skip this step, your changes will not be saved).
3. Click Complete.

Case Management PRO

Admin Client Data	Assignments	Input Time/Progress Notes	Monthly	Reporting	Forms	Back To Admin	Log Out
Select Emp	<input type="text" value="Select a Empl..."/>	Case	<input type="text" value="Select a Case ..."/>	Date	<input type="text" value="Select a Date ..."/>	<input type="button" value="Find"/> <input type="button" value="-"/> <input type="button" value="+"/> Spell Print	
Insert Case	<input type="text" value="Insert Case?"/>	Date	<input type="text" value="/ /"/>	<input type="button" value="Insert"/>	<input type="text" value=""/>	<input type="button" value="Copy"/>	<input type="button" value="Copy"/>
1838 - Maureen - Able							
Next Visit	<input type="text" value="06/07/2013"/>	Date	<input type="text" value="06/14/2013"/>	Status	<input type="text" value="-C(comp) R(review) F(final) R"/>		
<input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Complete"/>							
Reason for Referral and Presenting Issues:							
<div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;">The Client is Unhappy</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px; background-color: #f0f0f0;">More Details Please</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;">Family Functional Strengths</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;">The Family seems to interact well</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px; background-color: #f0f0f0;"> </div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;">Overall Recommendation and Progress Summary</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px;">Need Counseling</div> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 2px; background-color: #f0f0f0;"> </div>							

1838 - Maureen - Able

Visitation Monthly Reporting

Case Management PRO

Admin Client Data Assignments Input Time/Progress Notes Treatment Plan Visitation **Monthly** Reporting Forms Back To Admin

Select Emp Case Date Find - + Spell Print

Insert Case? Referral Referral? Date / / Insert Copy Copy

Date / / Status -C(comp) R(review) F(final) Save Delete Complete

Prohibited Persons (Include Protective Orders)

To add a new Visitation Monthly Report:

1. First you must check to see if a Visitation Monthly Report has already been entered for that Case/Referral.

- a. Select your Name from the Select Employee dropdown
- b. Select the Case /Referral from the Dropdown
- c. Select the Date. If no date is displayed for that month, you must insert a new monthly report.

CEI
Case Management PRO

Admin Client Data Assignments Input Time/Progress Notes Treatment Plan Vetting Monthly Reporting Forms Back To Admin Log Out

Select
Emp Case Date Find - + Spell Print

Insert
Case Referral Date Copy

Monthly Record inserted

Date Status -C(comp) R(review) F(final)

Prohibited Persons (Include Protective Orders)

Court Ordered Visitation Guideline

Visit Schedule

Visit Supervision

Activities and Special Considerations

Code of Conduct for Visits

Reason for Referral and Presenting Issues:

3. Inserting a New Monthly Report

- a. Choose the case from the Insert Case Drop Down
- b. Choose the Referral from the Referral Drop Down
- c. Type in the date. Always use the Last Day of the Month. You have the option of clicking on the calendar.
- d. All Text boxes must be filled in
- e. Then click on the Insert button.
- f. You should get a message that says the Monthly Report has been Inserted.

Updating a monthly Report

Case Management PRO

Admin Client Data	Assignments	Input Time/Progress Notes	Treatment Plan	Visitation	Monthly	Reporting	Forms	Back To Admin	Log Out
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Select Emp: Case: Date: [Spell](#)

Insert Case: Referral: Date:

Date:

Prohibited Persons (Include Protective Orders)

Court Ordered Visitation Guideline

Visit Schedule

Visit Supervision

Activities and Special Considerations

Code of Conduct for Visits

Reason for Referral and Presenting Issues:

To Update a Visitation Monthly Report:

1. Select your Name from the Select Employee dropdown
2. Select the Case /Referral from the Dropdown
3. Select the Date.
4. Click on Find.
5. Your report will be display.
6. Make any changes necessary
7. Click on save.

Complete Visitation Monthly Report:

Once you have added your monthly report, you will want to click on Complete so that it will be routed to your supervisor, so they can finalize it. This will change the status to a "C" when you look at it in the Monthly Detail.

The screenshot displays the Case Management PRO software interface. At the top, there is a navigation menu with tabs for Admin Client Data, Assignments, Input Time/Progress Notes, Treatment Plan, Visitation, Monthly, Reporting, Forms, Back To Admin, and Log Out. Below the menu, there are search and selection fields for Employee (Emp), Case, and Date. The Case field is set to 'Referral' and the Date is '11/30/2017'. A yellow banner indicates 'Monthly Record Inserted'. Below this, there are several form sections: 'Prohibited Persons (Include Protective Orders)', 'Court Ordered Visitation Guideline', 'Visit Schedule', 'Visit Supervision', 'Activities and Special Considerations', 'Code of Conduct for Visits', and 'Reason for Referral and Presenting Issues'. At the bottom right of the form, there are three buttons: 'Update', 'Delete', and 'Complete'. The 'Complete' button is highlighted with a red rectangular box.

Copy a Visitation Monthly Report:

9. First select the case from the Insert Case Dropdown.
10. After you choose the case and then the Referral, the copy dropdown box will be populated with the previous months for that case.
11. Enter the **new** month in the date field.
12. Choose the month you want to copy from the Copy dropdown box.
13. Click Copy.
14. The form will be populated with that monthly's data.
15. Make any changes needed. The following Fields will NOT BE COPIED and will need to be filled in.
 - a. Visit Schedule
 - b. Visit Supervision
 - c. Activities and Special Consideration
 - d. Overall Recommendations.
16. Then Click update.

Case Management PRO

Admin Client Data Assignments Input Time/Progress Notes Treatment Plan Visitation Monthly Reporting Forms Back To Admin Log Out

Select Emp: Select a Empl ... Case: Select a Case ... Date: Select a Date ...

Insert Case: Horrell, Maureen Referral: Horrell, Maureen | HT-SV | rf00 Date: 12/01/2017

Copy: 11/30/17

Date: / / Status: -C(comp) R(review) F(final)

Prohibited Persons (Include Protective Orders)

Court Ordered Visitation Guideline

Visitation Monthly Detail:

4. Click on Monthly and Choose Visitation Monthly Detail.
5. Make note of the Status:
 - a. Once you mark your Monthly Report complete a "C" will appear under status.
 - b. If your supervisor has rejected your report it will show an "R".
6. Click on the case number to see the actual Monthly Report.

CEI
Case Management PRO

Admin Client Data	Assignments	Input Time/Progress Notes	Monthly	Reporting	Forms	Back To Admin	Log Out
-------------------	-------------	---------------------------	----------------	-----------	-------	---------------	---------

Monthly Status Detail

Please Choose a Staff

Begin Date:
 End Date:
 Staff:

Client FirstName	Client Last Name	Case No	Date	Status	Mth Case Id
Bob	Hill	1862	6/7/2013	C	1862
Maureen	Able	1838	6/14/2013		1838
Maureen	Able	1838	8/1/2013		1838

Supervisor Review:

After you have marked your Visitation Monthly report complete, your supervisor will review it. They will either mark it "F" for Finalized and it will be extracted when they do the monthly reporting, or they will mark it with an "R" for Review which means you need to make some changes. When a supervisor rejects your report, they will make notes in the area that needs modifying.

CEI
Case Management PRO

Admin Client Data	Assignments	Input Time/Progress Notes	Monthly	Reporting	Forms	Back To Admin	Log Out
-------------------	-------------	---------------------------	---------	-----------	-------	---------------	---------

Monthly Status Detail

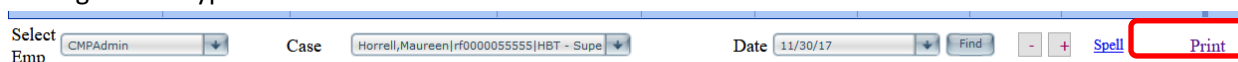
Please Choose a Staff

Begin Date: 04/01/2013 End Date: 08/03/2013 Staff: Mo Refresh

Client FirstName	Client Last Name	Case No	Date	Status	Mth Case Id
Bob	Hill	1862	6/7/2013	R F	1862
Maureen	Able	1838	6/14/2013		1838
Maureen	Able	1838	8/1/2013		1838

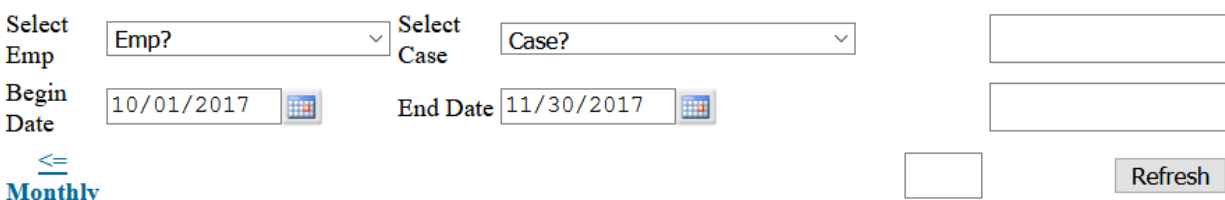
Monthly Reporting:

1. To Print your Report, you can do it by:
 - a. Clicking on the hyperlink

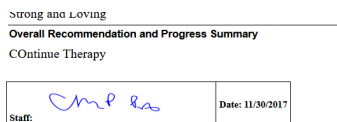


Or

- b. Click on Reporting Menu. Visitation Monthly Reporting
 - a) Select Your Name
 - b) Select the Case
 - c) Click Refresh.



2. If the Report Has Been Finalized (F). You can then export the report.
3. **MAKE SURE YOU CHECK THAT YOUR SIGNATURE IS DISPLAYED! IF YOU DO NOT SEE IT GO TO EMPLOYEE SIGNATURE AND RESIGN. You should get an error message stating that your Signature is not found.**



4. If you are exporting your Monthlies, Click on Export. A new Screen Form will appear with no buttons. This is the Report that will be exported to the server (Do not worry if the logo does not appear) .
5. *** If this is a DCS monthly report the report will be transmitted via the API to Kidstrack. The Status will now be T For Transmitted.
6. Use the Back button on the browser to return to the monthly reporting form.

Date

[Monthly](#)
Rpt Not Complete -

Your Company Name **Monthly Report- Visitation** Case # 531
 123 Main Client Maureen Horrell
 Your Town IN 44444 November 2017 County Brown

Referral Number: rf0000055555
Service Provided: HBT - Supervised Visit
Referred Parent(s): Maureen Horrell
Referred Child(ren): Diana Horrell
Prohibited Persons(Include Protective Orders): Father
Begin/End Date of Referral: 01/01/2015-01/01/2018
Referral Agency: County DCS
Case Mgr/ PO Name: Amy Baxley
Service Provider Staff: CMPAdmin
No of Service Unit Authorized: 55
No of Service Units Delivered: 2
Court Ordered Visitation Guideline: Weekly
Visit Schedule: Mondays
Visit Supervision: Supervised
Activities and Special Considerations: Games
Code Of Conduct for Visits: Be Nice

Contact Date	Start Time	End Time	Duration	Method	Location	Those Present	Staff
11/10/2017	10:00AM	11:00AM	1	Supervised Visit	Agency/Other Professional	Maureen Horrell	CMPAdmin

Visitation Reporting – Review/Updating a Report

Select Emp Case Date Find [Print](#)

Insert Case Date

1. Click on Select Empl/Case/Date:
2. Click on the find button.
3. Your visit will then be displayed.
4. If needed make your changes and then click the save Button

Visitation Reporting – Printing Report

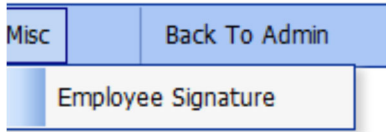
Select Emp Case Date Find [Print](#)

Insert Case Date

1. Click on Select Empl/Case/Date:
2. Click on the find button.
3. Your visit will then be displayed.
4. Click on the Print Button.
5. The new Visit report will be displayed. Click the print button and you will be able to create a PDF via CutePDF.
6. If you are exporting your Monthlies, Click on Export. A new Screen Form will appear with no buttons. This is the Report that will be exported to the server (Do not worry if the logo does not appear)
7. *** If this is a DCS monthly report the report will be transmitted via the API to Kidstrack. The Status will now be T For Transmitted.
8. Use the Back button on the browser to return to the monthly reporting form.

Employee Signatures

1. Click on Misc / Employee Signature



The Following form will be displayed.

Signature

Current Signature

Your Sign

Required points are still not reached 

[Back to Previous Page](#)

Use your mouse or stylus on your tablet to sign in the box.
You should see your signature in the current signature field.

Signature

Current Signature *My Signature*

Your Sign

Required points are still not reached 

[Back to Previous Page](#)

REPORTS

Progress Notes:

When you are ready to print or view Progress Notes, click on Reports and then choose Progress Notes.

Filters:

1. Begin Date
2. End Date
3. Case

Click on Refresh to refresh your report filters.

The screenshot shows the Case Management Pro interface. At the top, there are filter fields: 'Begin Date' (03/01/2013), 'End Date' (06/29/2013), and 'Case' (Andrews, Davion). A 'Refresh' button is highlighted with a red box. Below the filters is a navigation bar with '1 of 1' and an 'Export' button. The main content area displays 'Your Company Name' (123 Main Street, Indianapolis, IN 46205) and 'Date: 6/26/2013'. The title 'Case Notes' is centered. Below the title, there is a table with columns for Case, Client, Date, and Employee. The table contains two rows of data, each with a 'test' entry in the Date column.

Case	Client	Date	Employee
1841	Davion Andrews	6/1/2013	Mo
		6/1/2013	Mo

To Create the pdf:




1. On the dropdown to select the format choose PDF.
2. Click on export. The Case Notes Report will now be displayed in your PDF viewer. Save the file or choose Share – Email.

Timesheet:

When you are ready to print or save a .pdf copy of your Timesheet, click on Reports and then choose Timesheet.

Sample Timesheet

[Back to Previous Page](#)

Name : Begin Date  End Date  

Date	Begin Time	End Time	CaseNo	Case Name	Service	loc	Method	Bill Hours	Non Bill Hours	Detail
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2272
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2273
6/1/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2274
6/2/2013	11:00 AM	11:30 AM	1838	Barrios, Maria	TRP-CNSL	Park	Cancel by Client	0	1	2275

Grand Total

Total Billable	Total Non Billable	Tot Mileage
0	4	

1. If you need to make any correction, you can click on the detail number and that will take you back to the input/progress notes form to make your corrections.

The Dashboard is found under the MISC tab on the employee menu. Choose the staff, begin date, and end date and click on the REFRESH button.

The +- will expand and collapse the sections.

The far-right column will have a link to the reports or specific web form.

Staff Dashboard

Select Staff Begin Date End Date

Monthly Reports Missing OR Not Extracted/Transmitted

Monthly

Treatment Plans Missing OR Due

Treatment Plans

EmployeeName	CaseNo	Client First Name	Client Last Name	Treatment Plan Date	Daysold	Type	
cmpadmin	2	Patti	Boyer	8/1/2019	508	Due	Select
cmpadmin	2	Patti	Boyer	7/15/2019	541	Due	Select

<

Visitation Monthly Reports Missing OR Not Extracted/Transmitted

Visitation Monthly

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