Community and Residential Information System

(CARIS)

Participant's Manual

CARIS – MATC General User Training Manual

TRI – Technology Resource Inc.

Version 2.0
June 2007

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Introduction

What is CARIS?

CARIS is a clinically useful and comprehensive case management system enabling clinical teams to work collaboratively on a client's case and to maintain a longitudinal case history of all activities of client service. This tool, when used in practice, creates efficiencies in service, enables decision support and provides an auditable record of all activities associated with a client.

Pre-requisites

It is expected that the participants will:

- have completed the pre-training exercise (approx. 1/2 hr)
- be familiar with their job functions.
- have the following computer skills: able to log onto the network, use a browser to navigate the intranet or Internet, use a mouse, navigate in a Microsoft Windows environment, and type on a keyboard
- have attended a demonstration, if possible
- have an IDIR or BCeID account

Goal for CARIS Training

At the end of Community and Residential Information System (CARIS) training, participants will be able to independently use the CARIS web interface to effectively provide case management services for their organization.

Objectives for CARIS Training

Successful completion of the training will enable you to:

1. Access and navigate CARIS via a web browser.
2. Understand the importance of context in CARIS.
3. Perform basic and advanced searches.
4. Work with client and case information.

How to Use This Manual

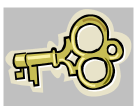
This manual is organized into a series of modules. Each module has a set of learning objectives, step-by-step instructions, annotated screen prints, exercises, and learning checkpoints. There is a glossary at the end of the manual.

User instructions make use of the following styles:

Function Keys, which are generally "buttons" in CARIS, are bold

<u>Menu commands</u> are underlined

"Field" or "Window Names" are in quotes

 This icon marks important reference information.

Training Support

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Additional CARIS Information

MCFD CARIS Information website https://caris.mcf.gov.bc.ca/caris_info/

MCFD Helpdesk (604) 775-4357

Module 1: CARIS at First Glance

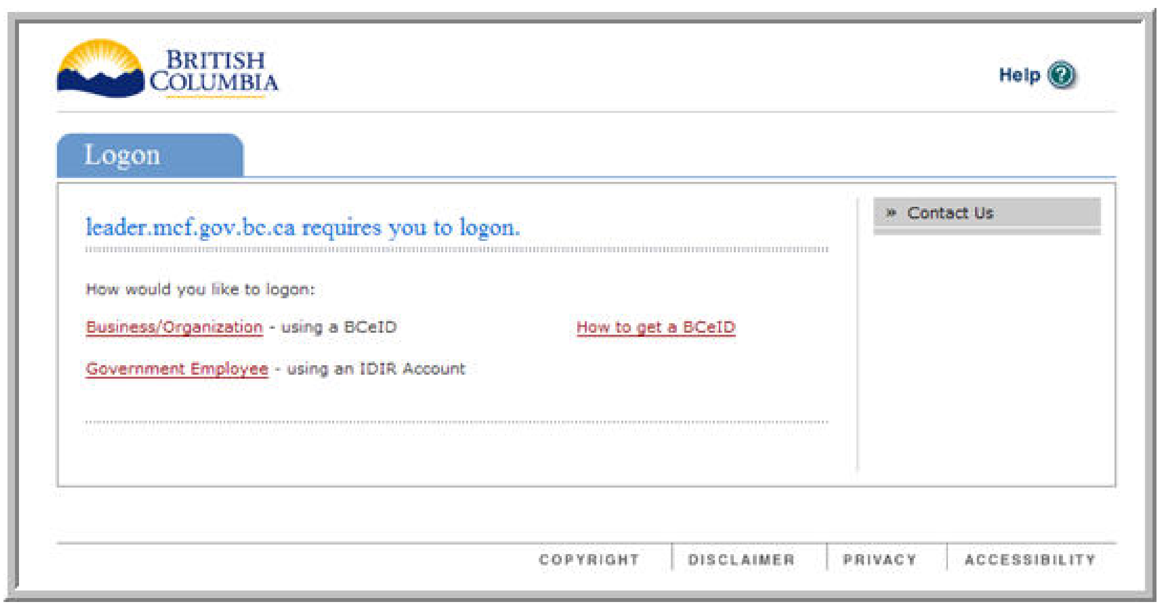
At the end of this module, participants will be able to:

1. Log on to CARIS, choose a role
2. Navigate CARIS
3. Identify the 3 contexts of CARIS
4. Log off CARIS

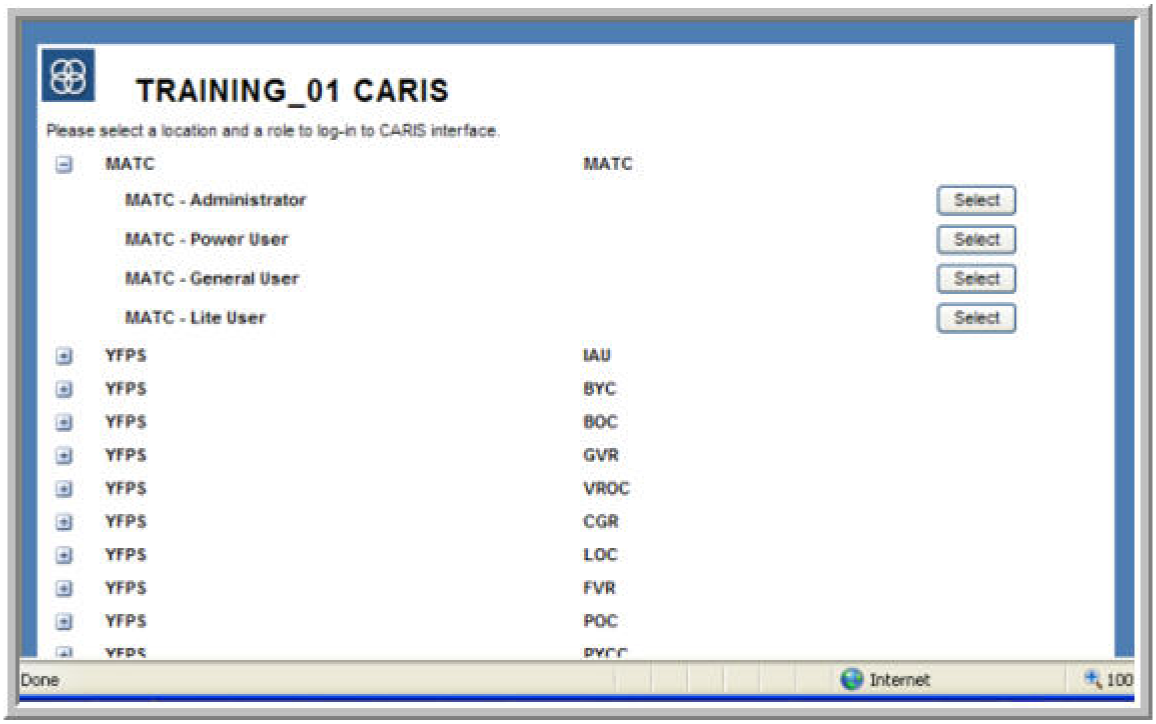
Log on to CARIS for Training

1. Start a browser session with Internet Explorer. (Double-click Internet Explorer on your computer desktop).
2. For today's training, type in the following address:

   https://leader.mcf.gov.bc.ca/caris This is a training site for CARIS, and the real sign in process will be somewhat different.
3. Click "Government Employee" and type the user name and password you have been given by the Facilitator into the appropriate fields.



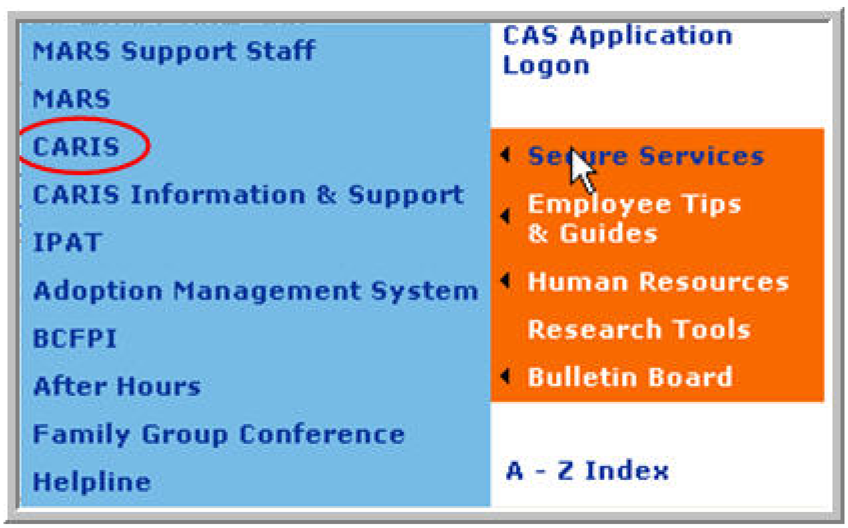
4. Click **Next**.
5. You will now be presented with the “Role Selection” Screen. You can expand any of the locations (= program areas) to display more information by clicking on the + sign.
6. Choose MATC – General User by clicking Select.



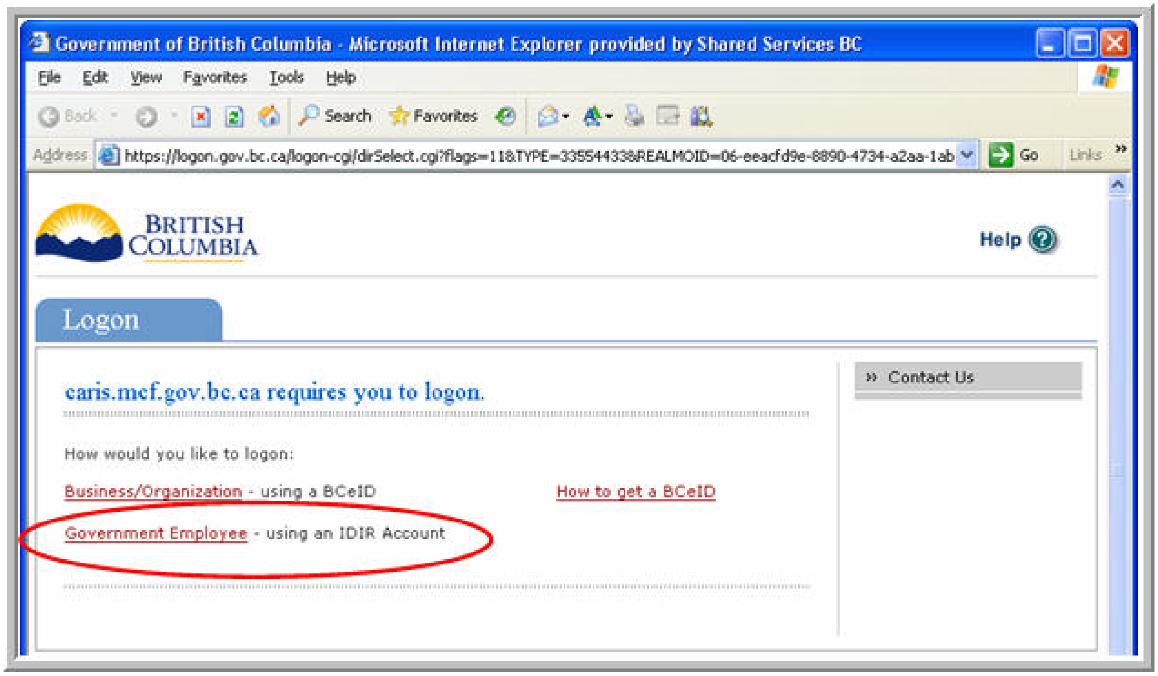
The procedure you will use to log on to CARIS when you return to your work place is as follows:

Start by opening Internet Explorer (other browsers will not work). You will get the Ministry home page, iConnect. In the right margin, click the link called Secure Services.

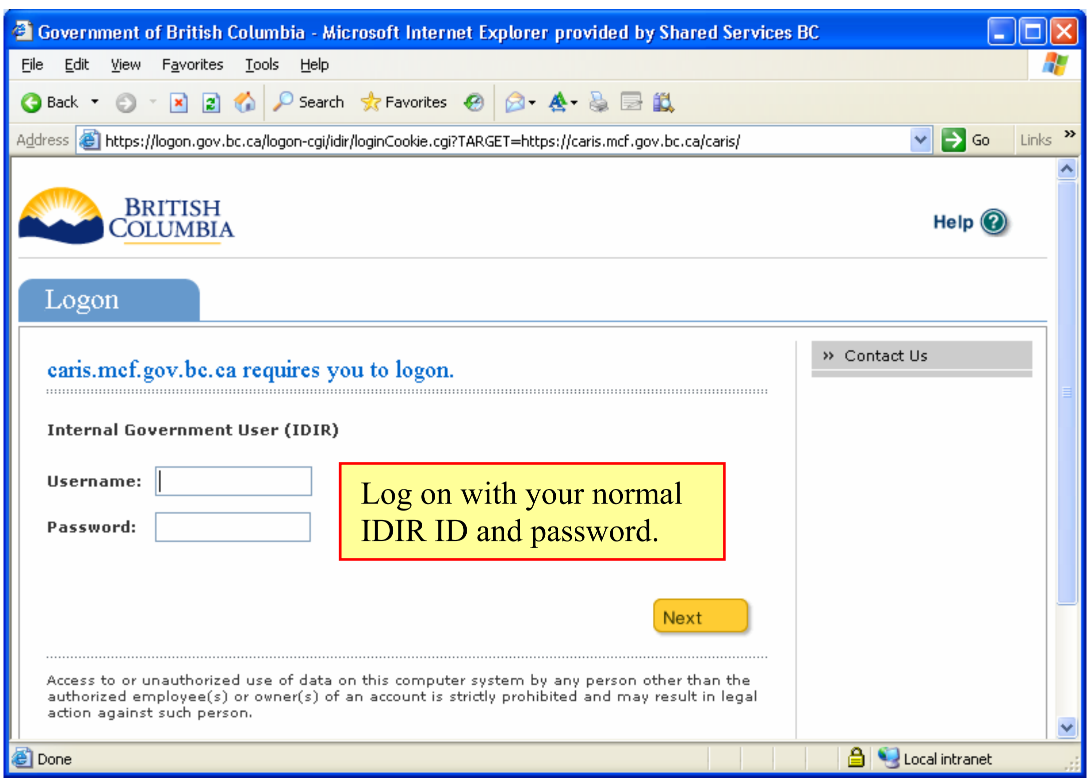
Then click CARIS.



Now you will see the "Logon" page. Click "Government Employee".



Then log on with your normal IDIR id and password.



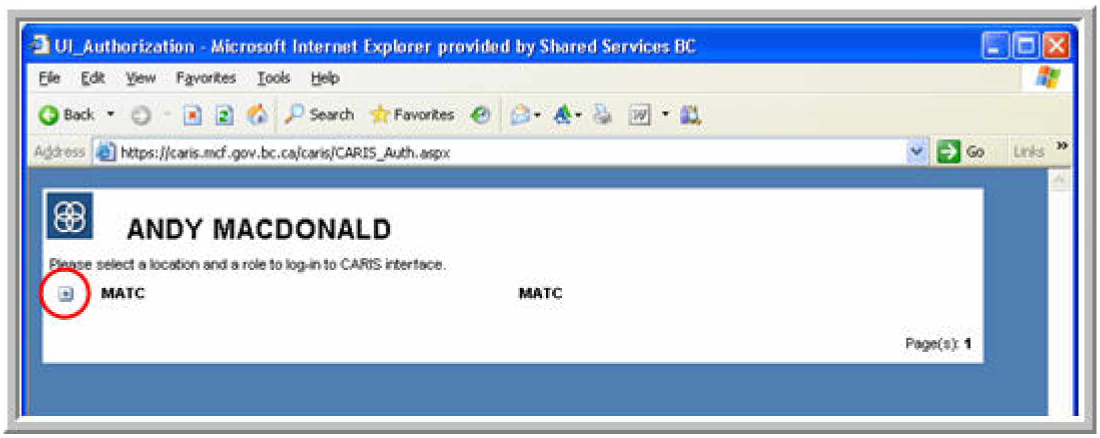
Log-On to CARIS with a Non-Ministry Computer

In order to view CARIS properly, you must have the add-on MSXML (version 4.0) loaded on to your computer's browser (must be Internet Explorer). You can download this add-on for free at www.microsoft.com/downloads.

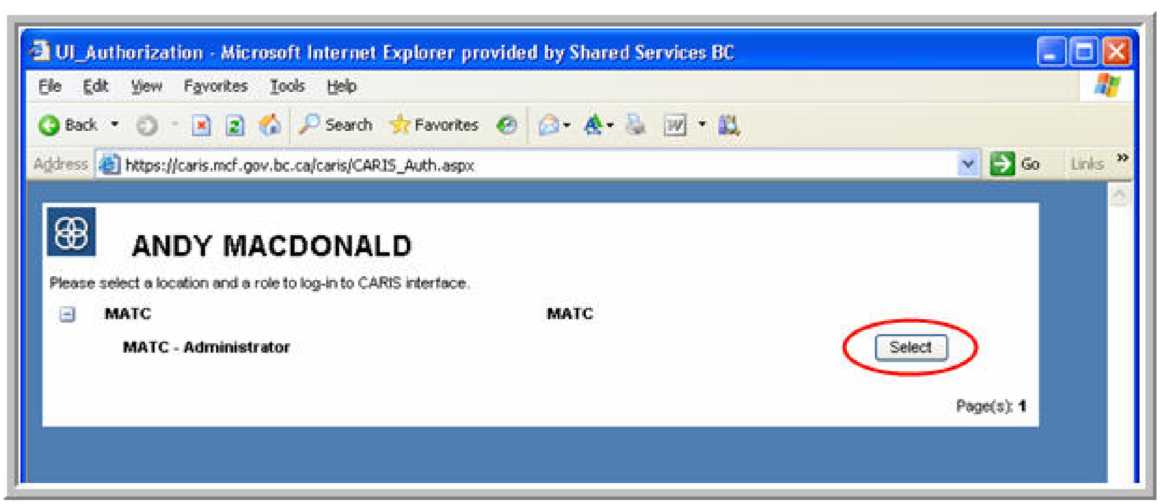
1. Start a browser session with Internet Explorer. (Double-click 

on your computer desktop).
2. Type in the following URL (address): https://CARIS.mcf.gov.bc.ca/caris.
3. Continue as described in previous section.

When you see this screen, click the + sign:

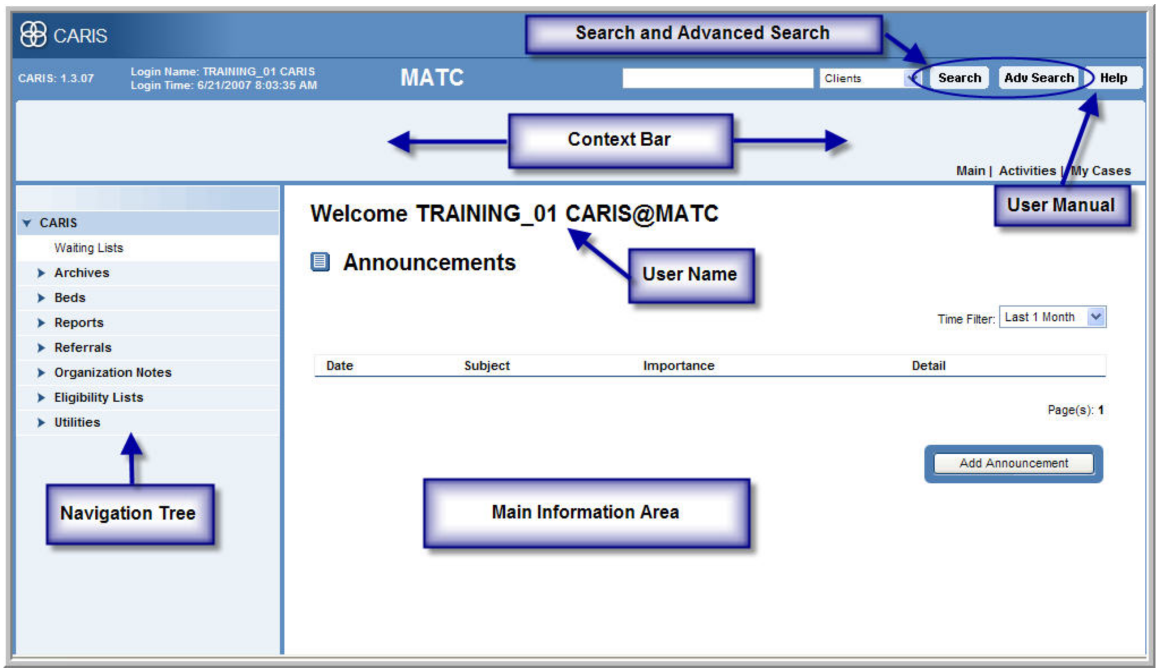


Then choose the appropriate access level…you will usually only have one…and click **Select**:

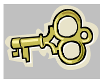


…and you are in.

View the Main Page



Context Bar	The area where the Client Name and (if he/she has one) the Case Description will display.
Navigation Tree	The expandable list of functions that can be performed using CARIS. These functions change based on the user and the context.
Main Information Area	This is where all the information, tables, windows, and data display.
Search and Advanced Search	These functions provide you with the capability of finding persons or organizations already in the database.
Help	The Help option will take you to the User Manual.

Your screen display may include the browser functions.

F11 will turn the browser functions off. DO NOT USE the browser functions to navigate through CARIS, particularly the back and forward arrows. These arrows will not work properly since they are browser functions, not CARIS functions.

Instead of using the back arrow on your browser, clicking **Cancel** or the **Back** button on your open window will take you back to the previous window and cancel the operation you were performing in the open window.

Log Off CARIS

1. To log off CARIS, simply close your browser window (File>Close) or click the red x.

Note that there is time-out feature on CARIS. You could be logged off automatically if you do not work on your files for 40 minutes.

Exercise 1

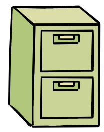
1. Log on to CARIS as a MATC General User.
2. Are there any announcements on your main page? If so, what is the nature of the announcement?

   ____

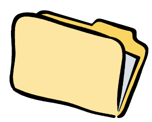
3. Log off CARIS.

Understanding Context

Context is an important concept as it defines where you are in the system.
There are three contexts in CARIS:

- CARIS Context = 

  CARIS context is the filing cabinet. When you log on to CARIS, you are in CARIS context.

- Client Context = 

  Client context is the client's file folder with information such as address, phone numbers, relationships and demographics. Client context information may be viewed by **any CARIS user.**

- Case Context = 

  Case context is the client's case information. This is where case information is created and stored. Case context and the information stored here is accessible only by YFPS CARIS case members.

Imagine - **CARIS context** is the filing cabinet; **client context** is the client's set of file folders with the client name and address on the tabs; **case context** is the client's case file folder.

Security and Privacy

Security and **Privacy** are essential in the proper care of client information. Security and Privacy are different, though complementary, elements and need to be differentiated.

Security is a matter of doing many small things properly including developing and following policies, regulations, and procedures and appropriately handling paper and passwords. Security also involves securing the hardware network, the database and the transactions online.

Security for CARIS is the responsibility of the Province of B.C. and is handled by standard government security protocols at CITS (Common Information Technology Services), who are the "hosts" for the CARIS application.

Security is also the responsibility of the users. Every user of the system is responsible for maintaining the confidentiality of their ID & password, and to prevent unauthorized access by locking down their workstation when they leave it unattended.

The CARIS application resides within the SpanBC network behind the government firewall. Users will access CARIS through IDIR or BCeID authentication. While CARIS is an internet-based web application, security is protected by making it accessible only by authorized users with the correct name, password and domain information.

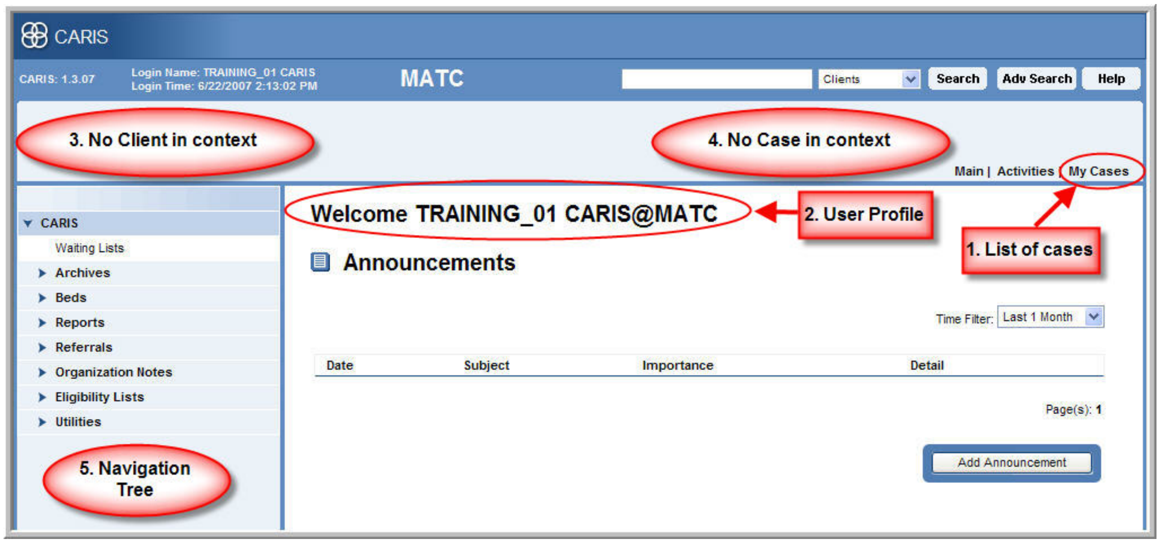
Privacy is a different matter. Privacy relates to the relationship a client and the clinician have to the client's data. Privacy specifically relates to data and the management and access of that data in the course of clinical care by authorized users.

CARIS provides tightly controlled case-based privacy which enables a case manager to determine who is able to view and contribute to a client's case.

CARIS handles privacy in a number of ways including the provision of a complete audit trail which enables the review of all accesses, activities and interactions on a client's case. CARIS' ability to share data across program and "office" boundaries is controlled by the policies for data sharing of each organization.

Forms in CARIS are not documents that can be e-mailed; but are centralized and accessed remotely by authorized individuals on an as-needed basis. All accesses, changes and views of the client forms are recorded and auditable.

CARIS Context



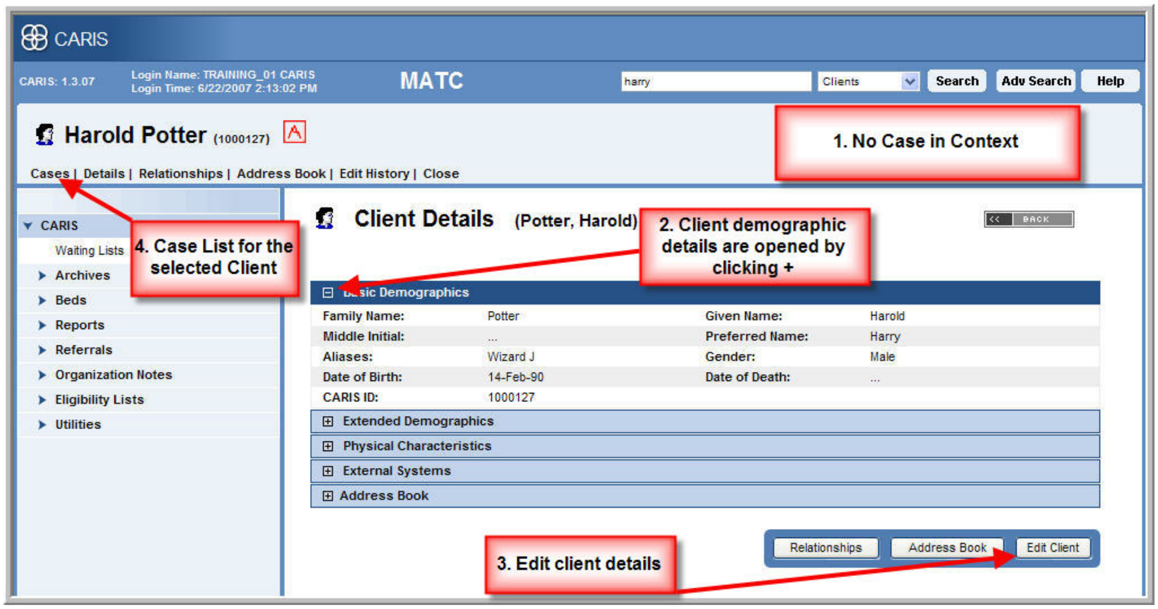
When you log in to CARIS, you will be on the "Welcome" screen, which is in CARIS context. You will know you are in CARIS context, because the context bar is empty except for the context menu options in the lower right hand side of the context bar (Main/Activities/My Cases).

In CARIS context, you will see:

1. The user profile of the person who logged in and their location.
2. The client context information area (on the left hand side of the context bar) is empty.
3. The case context information area (on the right hand side of the context bar) is also empty.
4. The Navigation Tree lists the functions available in CARIS context.

Client Context

Client context focuses on a client and provides access to the client's demographic information and list of cases. No clinical details are accessible in this context. Access is further restricted to the cases of which you are a member.



You know you are in Client Context because a name and CARIS number appear on the left hand side of the Context bar. This ID number will be used to identify the paper file belonging to that client.

When you are in "**Client Context**", you can change details about people in the database such as demographic information, addresses and relationships, but not case details.

You will know you are in Client Context when:

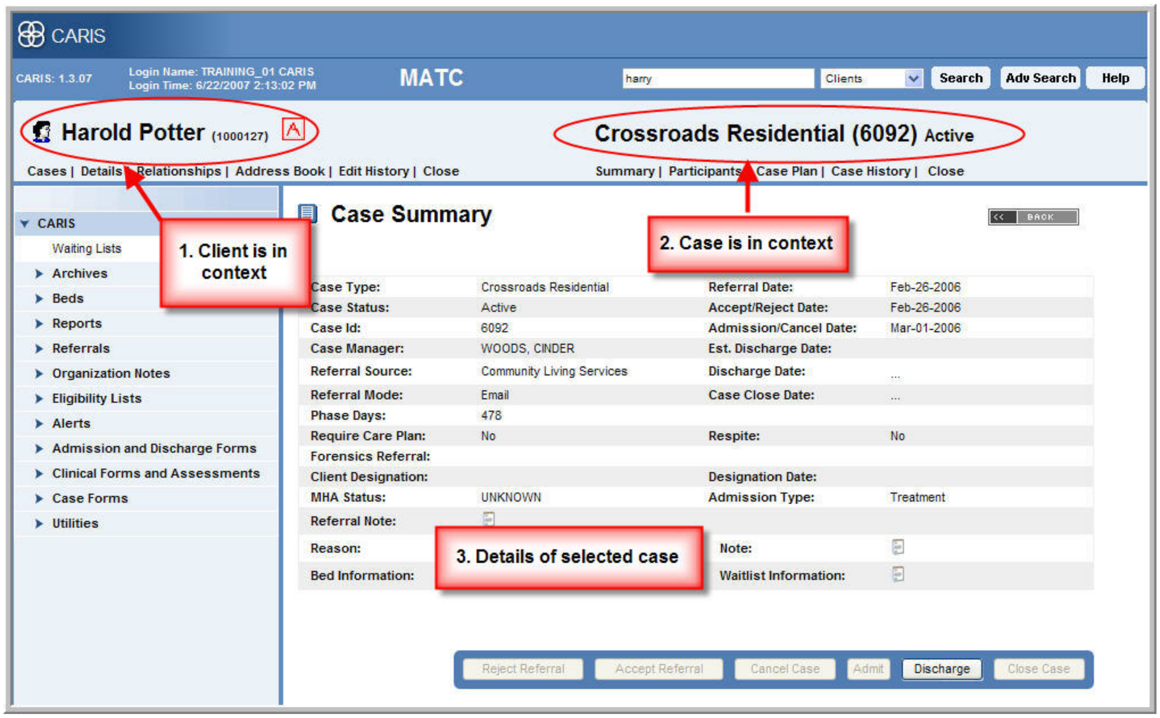
1. The case information space is empty on the context bar (right hand side).
2. The client's demographic details window is opened by default.
3. The client's details may be edited (if your role allows you to do so).
4. A list of cases the client is involved in may be viewed (and accessed with an appropriate access role).

 To access the case information you must be a member of the case **and** logged into the correct location.

.CASE Context

Case context focuses on the individual case. A client can have more than one case, but you can only access one case at a time.

Cases can have multiple members who have access to the case information and can perform relevant functions based on their roles. The case manager can determine who the case members are and can add or delete them as appropriate. Once deleted, a member can no longer access the case information, activities list or reporting functions on that case.

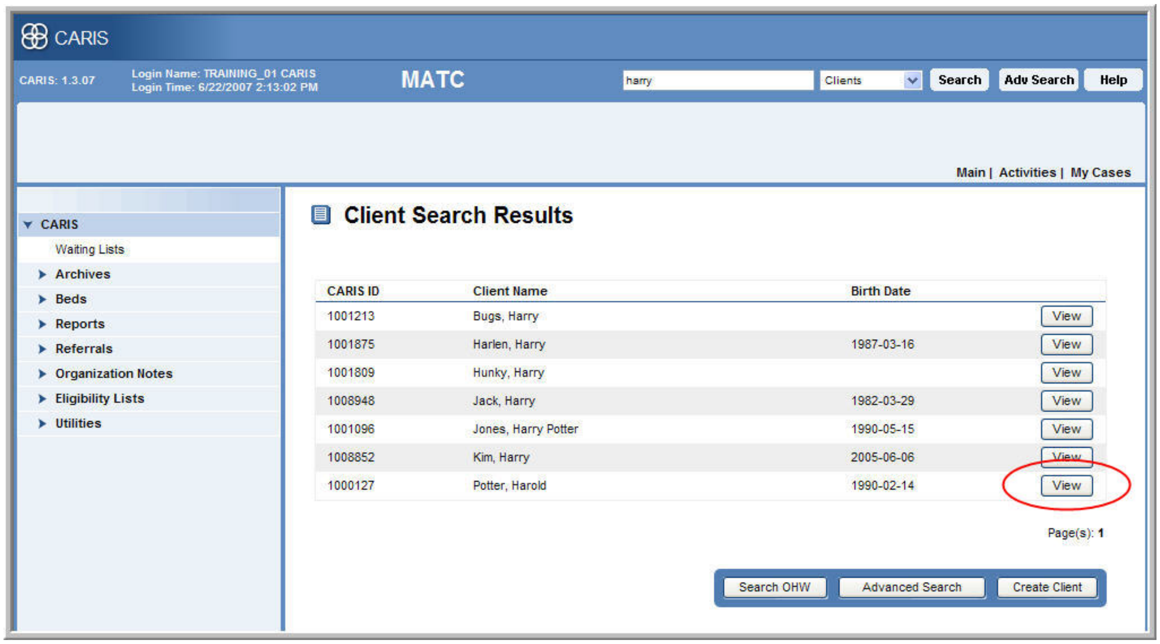


You will know you are in Case Context when:

1. The client's name appears in the context bar (left hand side).
2. The case number and case phase appear in the context bar (right hand side).
3. Details appear in the main information area.

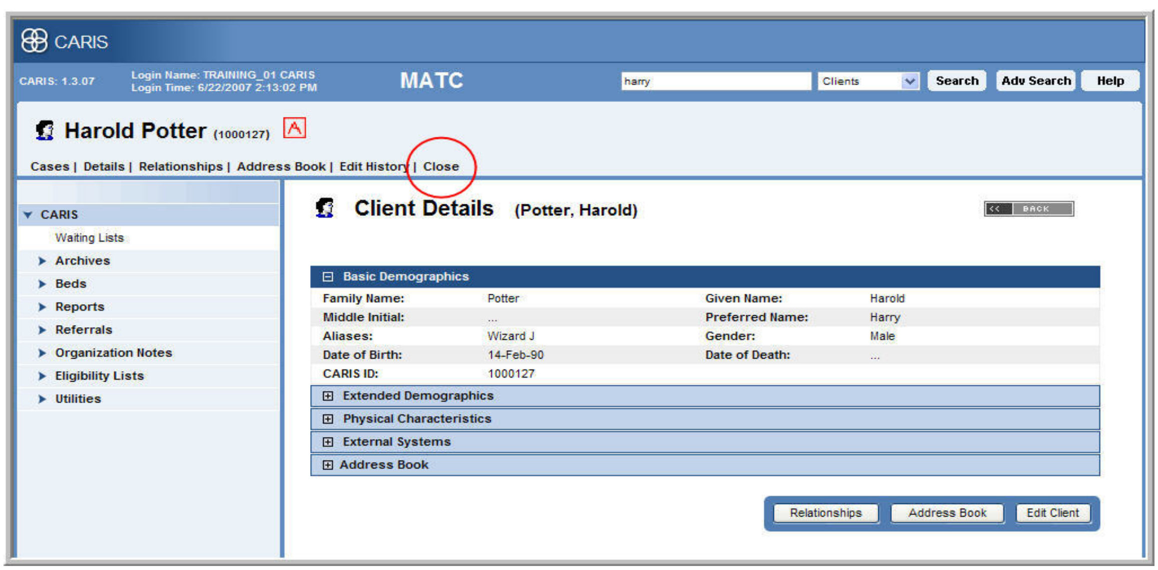
Exercise 2

1. Log back on to CARIS as a MATC General User.
2. Type "Harry" in the open search field at the top of your screen and click **Search**. Click **View** when you find a Harry and open his file.



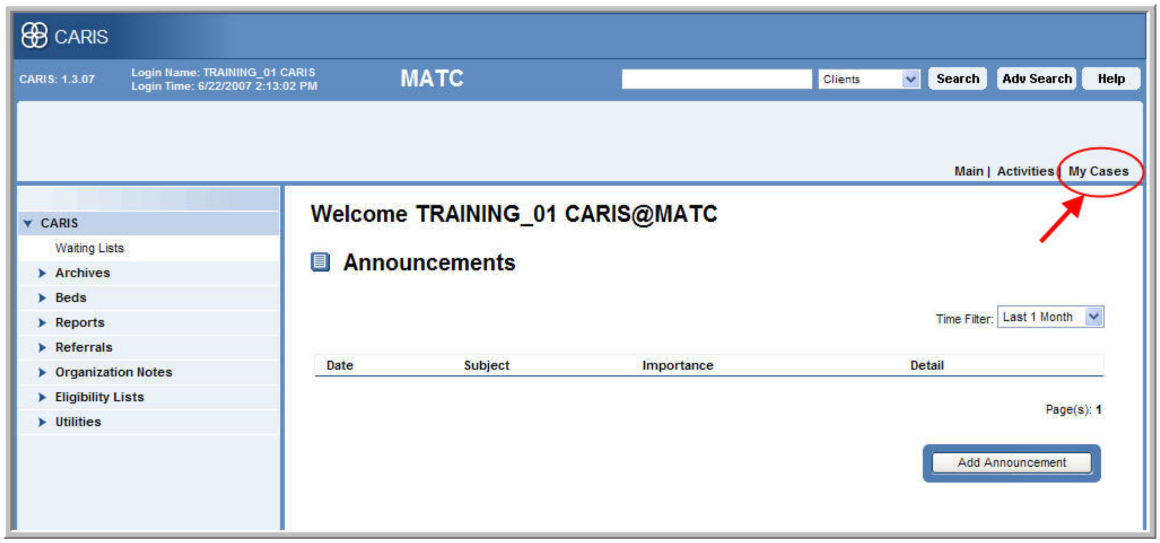
What context are you in now? ___________________________________

3. Click Close in the context area.



What context are you in now? ___________________________________

4. Open My Cases and click **View**.



What context are you in now? ___________________________________

Learning Checkpoint

1. What are the 3 types of context in CARIS?

____

____

____

2. (a) How will you know when you are in the CARIS context?

____

(b) What are the CARIS context menu options?

____

3. (a) How will you know when you are in the Client context?

____

(b) What are the Client context menu options?

____

4. (a) How will you know when you are in the Case context?

____

(b) What are the Case Context menu options?

____

5. How can you find your cases?

____

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Module 2: Organization Notes

At the end of this module, participants will be able to:

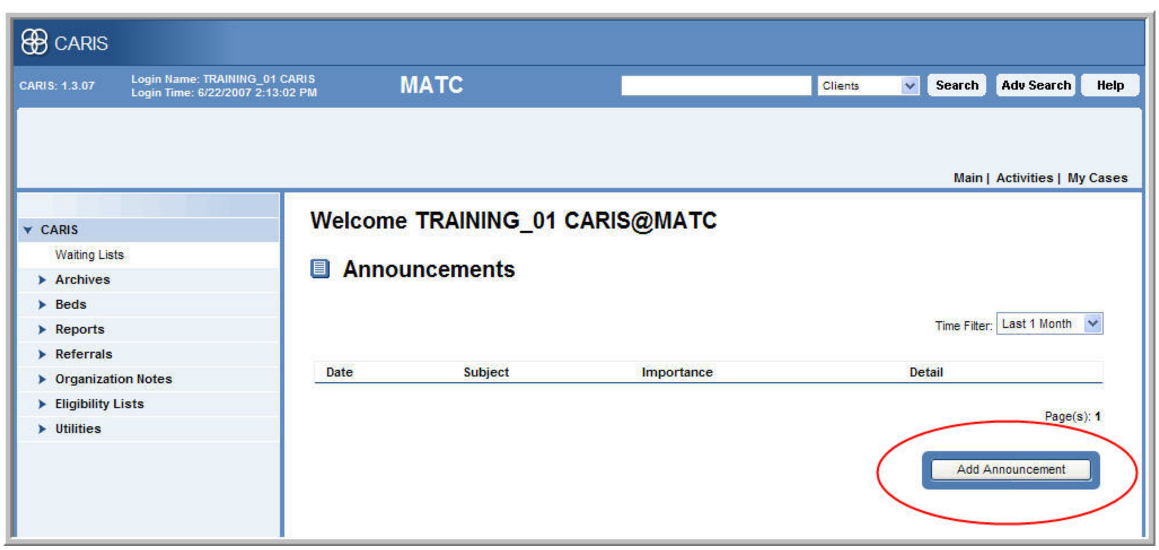
1. Access Organizational Notes
2. Create and delete an Announcement
3. Create and edit a Safety Procedure
4. Create and edit a Topic-Based Consultation
5. Attach a file to an Organization Note
6. Search for Organization Notes
7. View Waiting Lists, Eligibility Lists, and Case Transfers

Create an Announcement

Announcements can be used to notify everyone in your location about a CARIS-related topic or event. For example, if you add a new group to the Eligibility list, this would be a way to let your colleagues know that the group is available. As another example, if your Team leader has scheduled a CARIS usage meeting, this would be a way to announce that. Announcements will be seen by CARIS users who have access in your location.

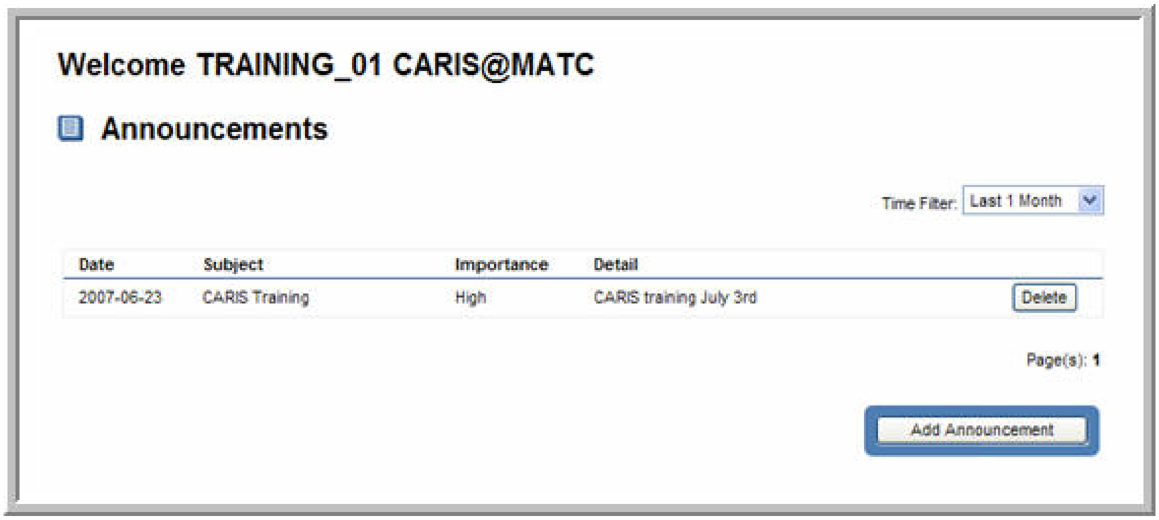
To create an announcement:

1. Open Organization Notes in the Navigation Tree and then Administration.
2. Click **Add Announcement.**



3. Enter the subject, assignment a level of importance, and type the text of the announcement in the “Announcement” field.
4. Click **Save**.

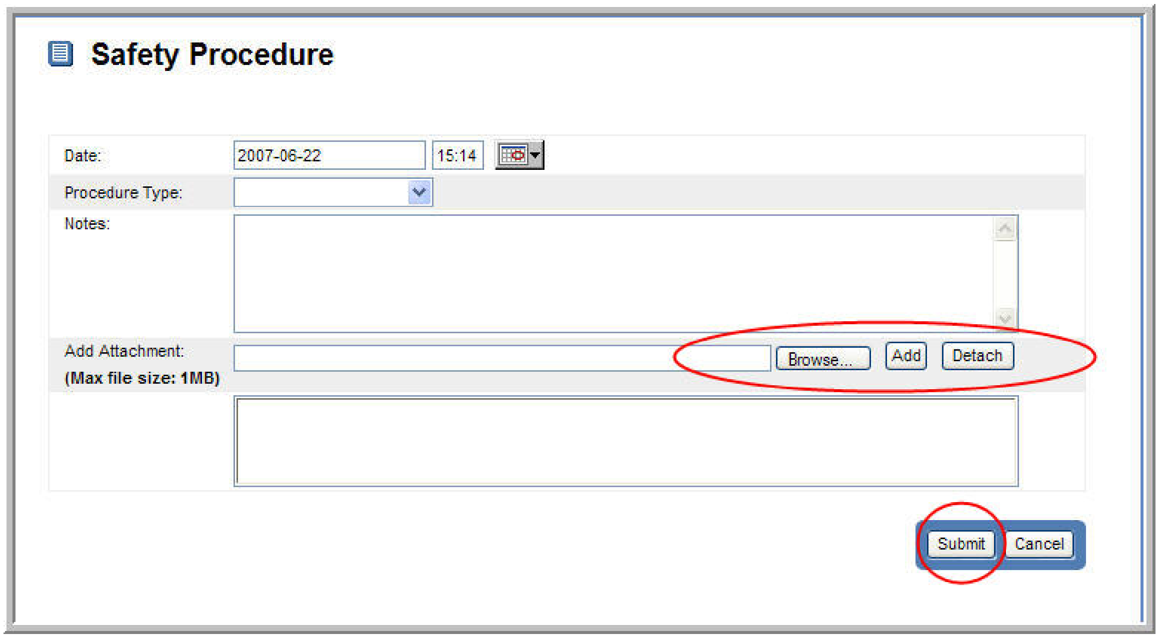
5. To delete the announcement, click **Delete**.



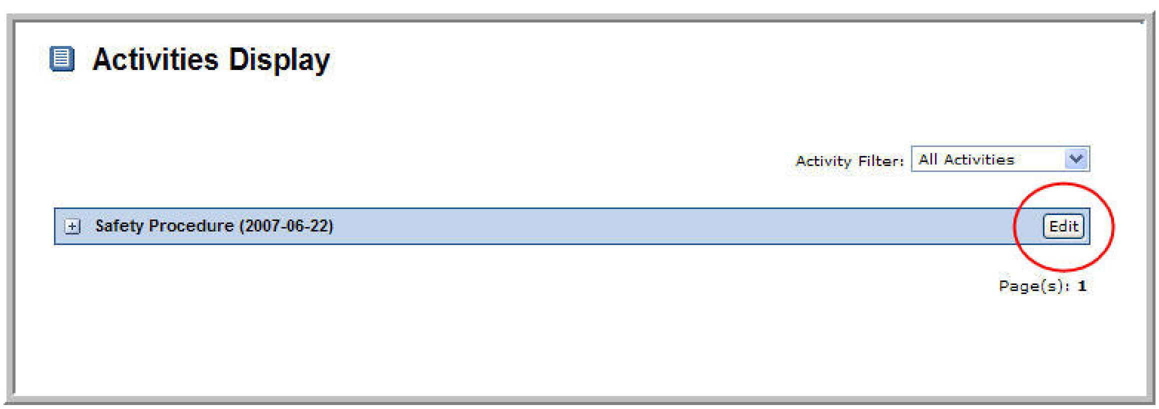
Create a Safety Procedure

To record a safety event:

1. Open Organization Notes in the Navigation Tree and then Safety Procedure.
2. Select the "Procedure Type" from the list in the drop-down box and type the text of the procedure in the "Notes" field.
3. To attach a file, use the **Browse** (to locate the file on your machine), **Add** (to attach the file), and **Detach** (to remove the file) buttons.
4. Click **Submit**.



5. To edit the safety event, click **Edit**.



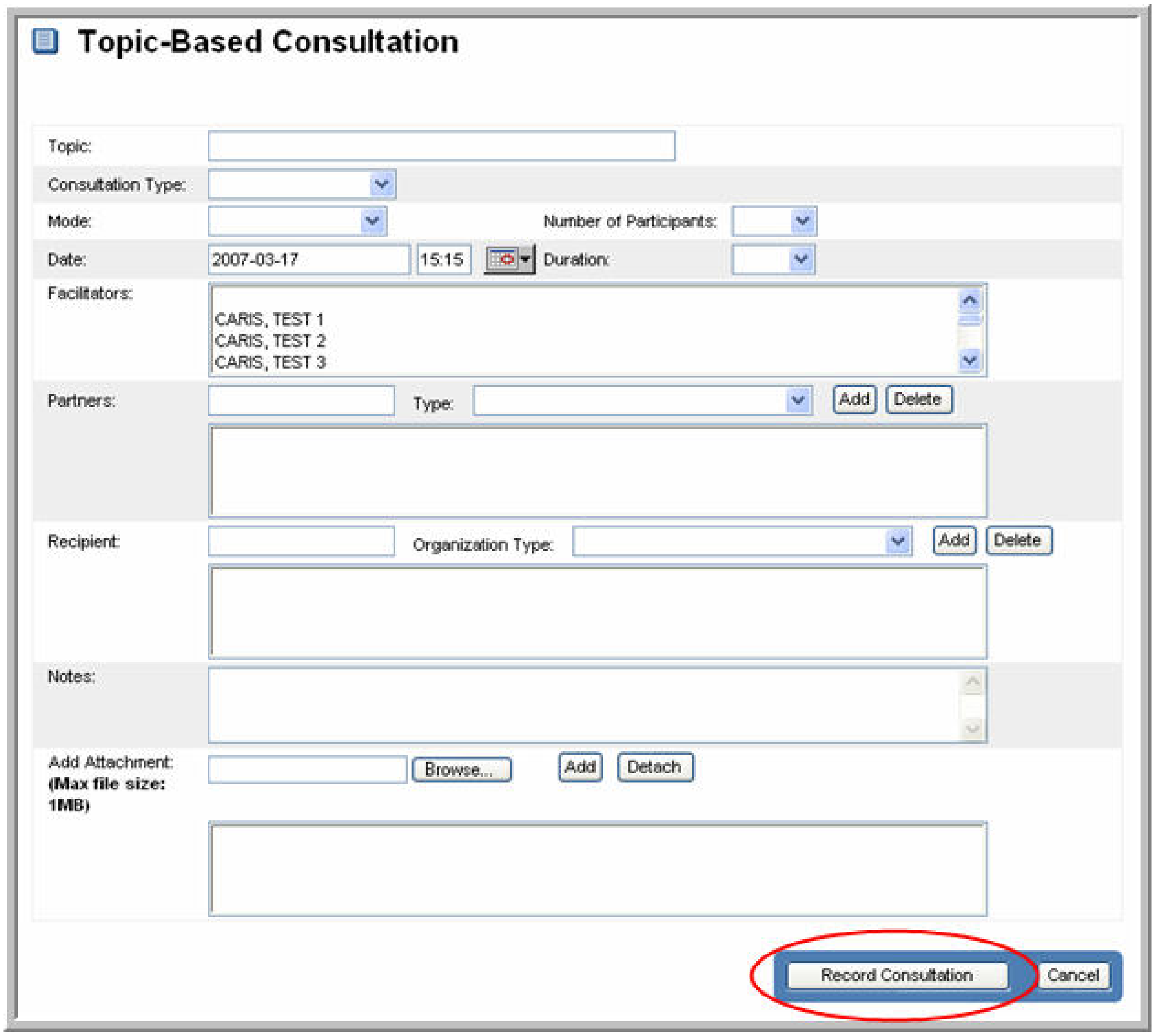
6. In edit mode, you can change the content and save (**Save Changes**), change the content and then restore it (**Reset**) or cancel the changes (**Cancel**).

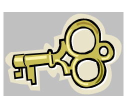
Create a Topic Based Consultation

This feature gives you the chance to enter information about an information/educational activity you perform for the community or another service provider. It can also be used to record groups that are provided in other venues for people who are not presently clients nor are expected to become clients, or when you do not want or need to record the names of the group participants. It is not based on a particular client or case, and that is why in CARIS it is not related to either context. Topic-Based Consultations will be seen by everyone who has access to CARIS in your location.

To create a topic based consultation:

1. Open Organization Notes in the Navigation Tree and then Topic Based Consultation.
2. Enter the “Topic”, select the “Consultation Type”, “Mode”, “Number of Participants” and “Duration” from the list in the drop-down box, highlight the name of the “Facilitator”, and add appropriate notes. Confirm the “Start Date” and “Start Time”. Add an “End Date” if appropriate. For “Partners” and “Recipient” type the name in the blank field, select an organization from the list in the drop-down box, and click **Add**.
3. Click **Record Consultation**.





The name of the Facilitator must be selected for the consultation to be saved. Topic based consultations cannot be reported on or printed; they can only be viewed online.

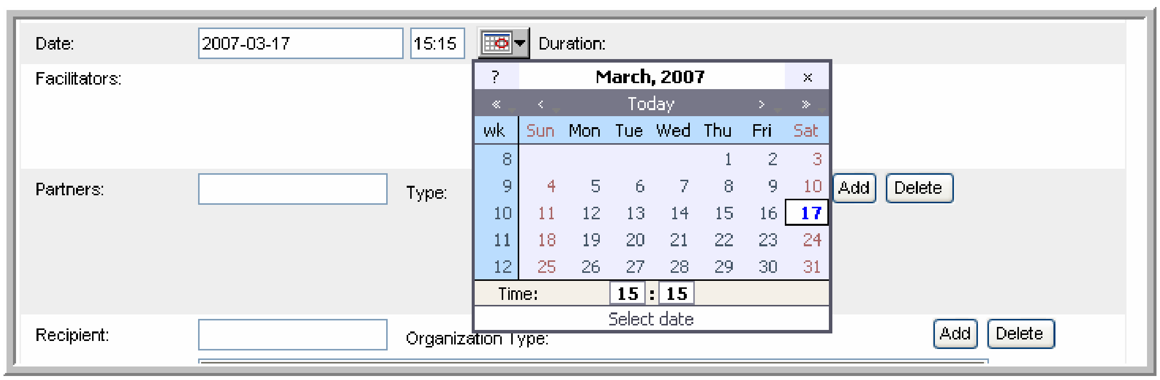
Using Notes and Forms in CARIS

The Topic-Based Consultation is a good example of all the notes and form controls used in CARIS.

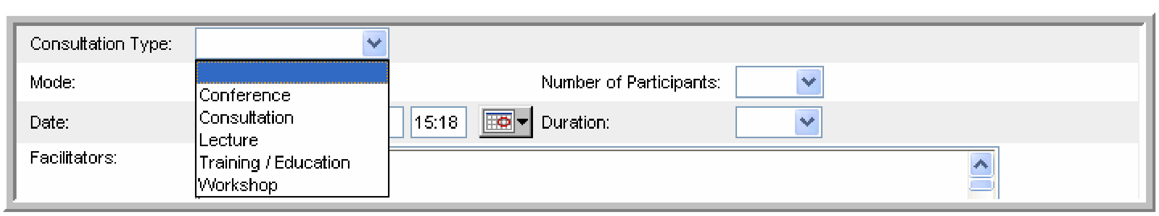
Forms are set up to work best when you fill them in from left to right and then down. Shading is used to designate the different parts of a note or form.

1. Dates are selected by clicking the box at the end of the date field. You may also be able to type over the date (YYYY-MM-DD).

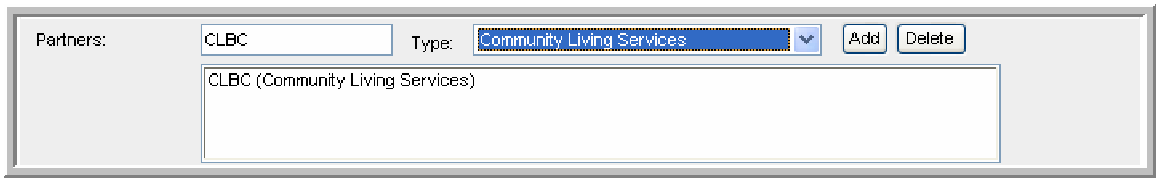
The > link changes the month (>> if present changes the year). Select the date by clicking on the date of interest in the calendar. If you click and hold on the arrowheads, you may be able to scroll up and down the years and the months. If there is a time field on the calendar, click increases and shift/click decreases.



2. Fields with drop down boxes will display a list of values for you to choose from when the arrowhead is clicked. Clicking the down arrow for "Consultation Type" displays the values.

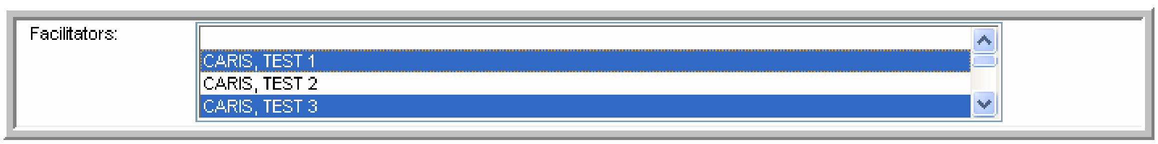


3. Fields with an **Add** and a **Delete** button allow you to choose a category from the first drop-down list box and then one from the second drop-down list box. The value you select in the first list determines the values you are presented in the second list.



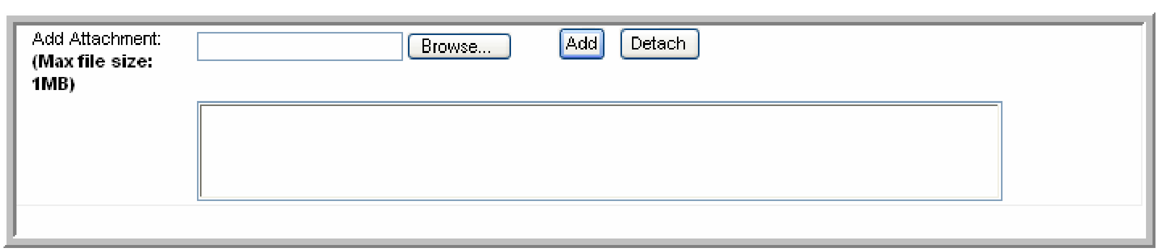
Clicking **Add** adds the value to the box below. This allows you to add multiple values. Note: Be sure after highlighting to click "Add" or the value will not be selected. To delete a value, highlight the value and click **Delete**.

4. Some controls allow for multiple selections as in selecting Facilitators where one or more items from the list can be selected using the "Ctrl" key.



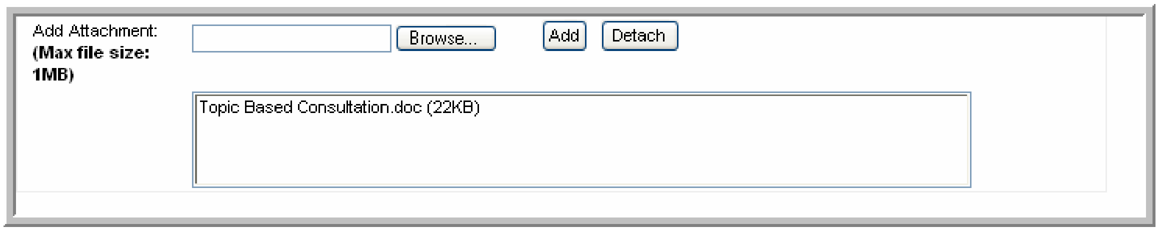
On these kinds of Drop Down Lists, at least one item (even if there is only one) must be highlighted for the selection to be saved.

5. Certain forms allow for attachments. To add an attachment, use the **Browse** button to locate the attachment on your workstation (a Word document saved on the CYMH N: drive or your personal H: drive).



Click **Open** when you find the file and **Add** when the path appears in the "Attachment" window.

The document will appear in the box below. It is now saved on the CARIS server and can be viewed in Activities. However, it cannot be removed once you save the form (use **Detach** if you change your mind before saving the form).

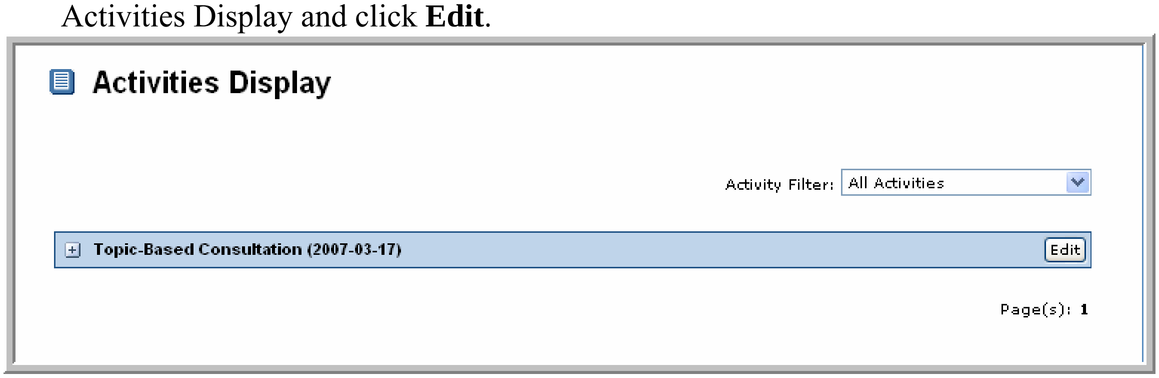


6. At the bottom of the note and form screens you will see action buttons.

These are the buttons that save your work, return you to a previous screen, and sometimes reset the form or move you along in CARIS. If you do not "Record" or "Save" your entries, they will be lost, so be sure to scroll down and find them!

Note that when you Record a note, you are returned to the Activities Display. This is where the activities you record are saved and where they can be retrieved.

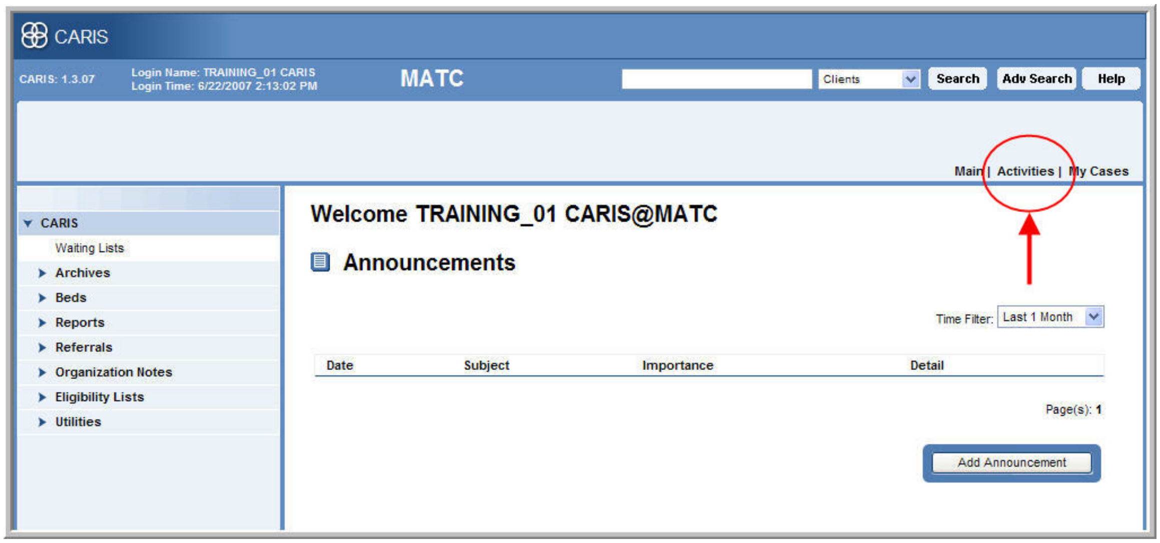
7. After you have recorded or saved a note or form, you may find you need to edit it. To edit the Topic-Based Consultation, if you weren't already there, you would go to the Activities Display and click **Edit**.



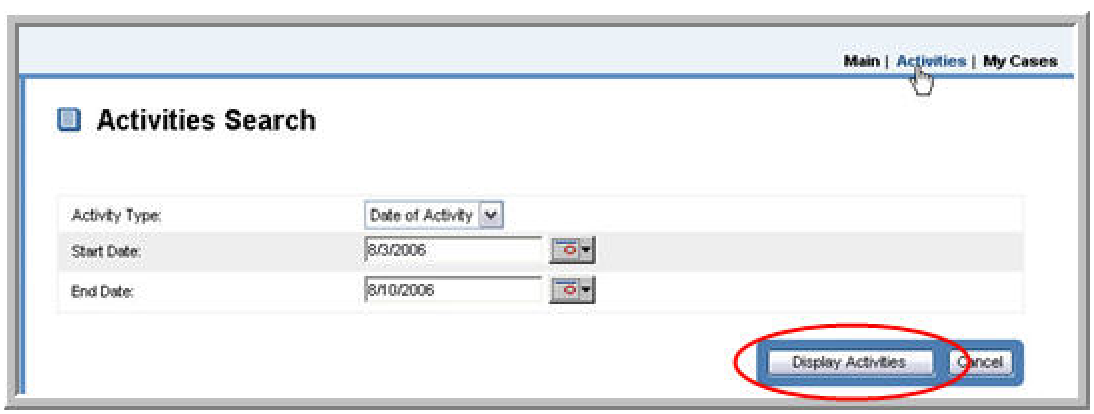
In edit mode, you can change the content and save (**Save Changes**), change the content and then restore it (**Reset**) or cancel the changes (**Cancel**).

Search for Organization Note

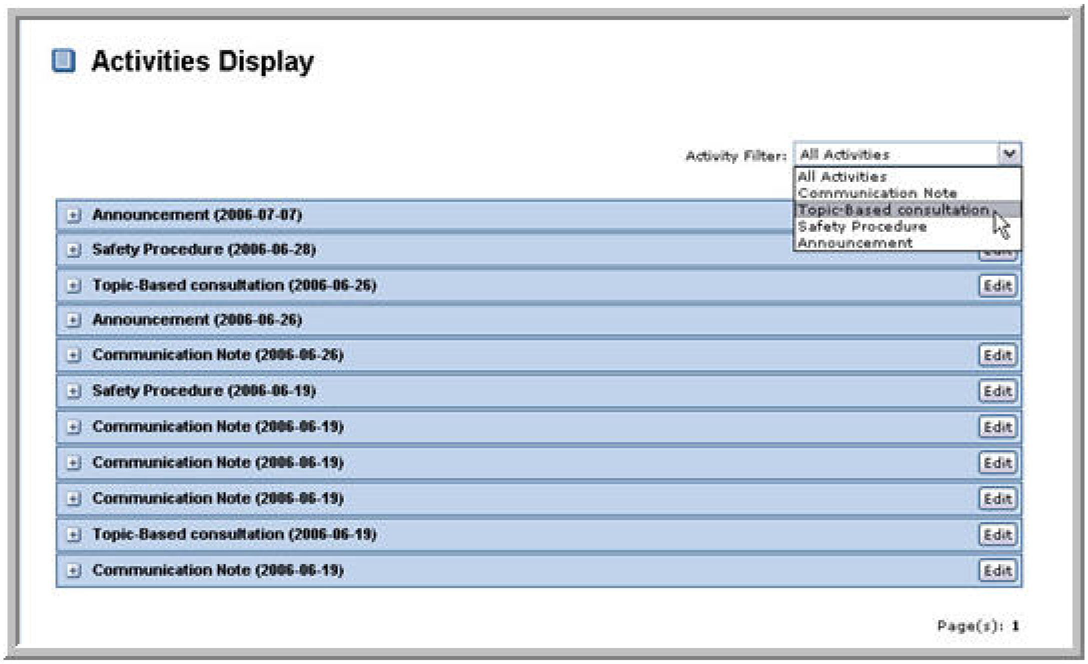
To search for an organization note, click Activities in CARIS context.

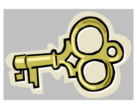


Activities can be searched by date of activity or entry date and by start and end date. Click **Display Activities.**



When the list of activities is displayed, the list can be filtered by activity type.

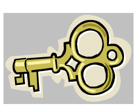




Organization notes are available from the navigation tree when in Case context even though organization notes are not connected to cases. Client information should not be recorded in organization notes, as anyone with CARIS access can view the notes.

Exercise 1

1. Create an Announcement and then delete it.
2. Record a safety event.
3. Create a Topic-Based Consultation and then change the mode.



From the Navigation Tree, you can access the following:

1. The Waiting Lists
2. Bed Reservations
3. Incoming Referrals from CYMH
4. Eligibility Lists

Learning Checkpoint

1. Name three types of Communication Notes.

2. Name three types of Topic-Based Consultations.

3. Where can you find a list of the Topic-Based Consultations delivered by your location over the past three months?

4. Would you expect a consultation between a client and his/her psychiatrist on eating disorders to be recorded as a Topic-Based Consultation?

5. Name three items on the Navigation Tree that can be accessed in CARIS context?

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Module 3: Working with Clients

At the end of this module, participants will be able to:

1. Add and update client demographic information
2. Add and update client's relationships information
3. Add address book information

Definitions of Various Persons in CARIS

Affiliate: Someone who has direct or indirect interest to the Client's case , but does not have access to the client's file. Typically a family member, social worker, probation officer, minister or police officer. (Non-MCFD.)

Client: The primary person in a Case who is receiving a service.

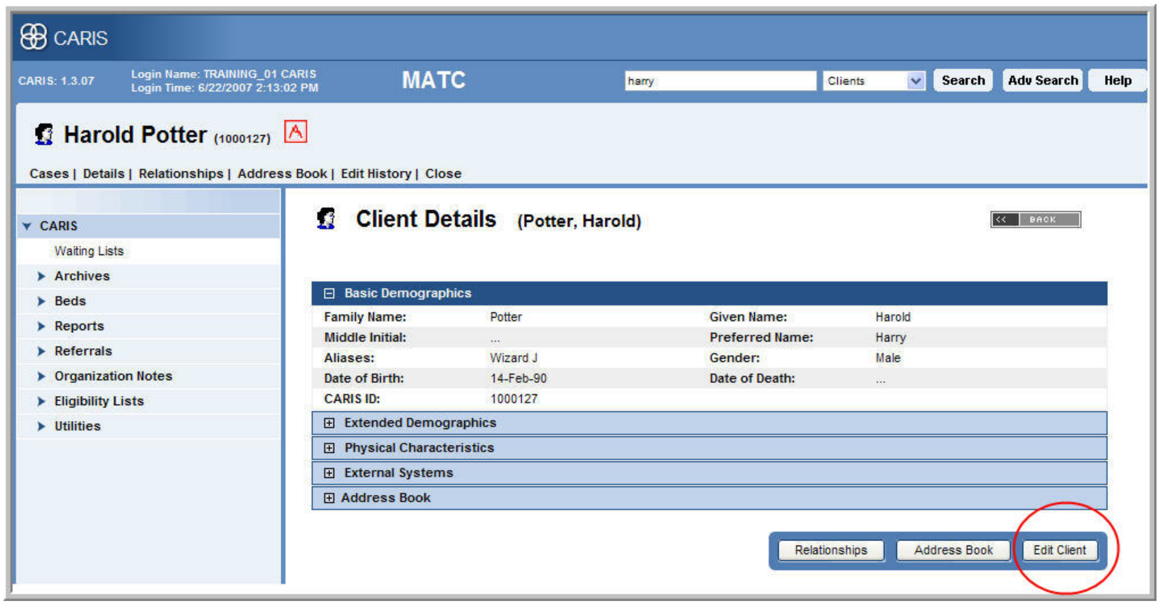
Contact: A person who is connected to a Case but who cannot view the Case File. For example, a family member, friend or neighbour.

Member: A Maples staff member who has access to the client's file in CARIS.

When you have a client in context, there are a number of actions available to you. You can access the list of cases (Cases), review client information (Client Details), add or remove client relationships (Relationships), and access the client's address information (Address Book).

Add or Update Client Demographic Information & Physical Characteristics

1. Bring client into context and click **Edit Client.**



The "Edit Client" window will display. There are three aspects of the client's details that can be updated: basic demographics, extended demographics, and physical characteristics. The page opens with the basic demographics in view. To access the extended demographics or the physical characteristics, click the + sign.

1. Click into the field you wish to update.
2. Click **Save Changes** to retain your updates, and the new demographic will be saved.
3. Click **Reset** and your changes will be erased and the original entries restored.
4. Click **Cancel** and you will be returned to the "Client Details" window.

Exercise 1

1. Create a client in CARIS based on a fictional character, as demonstrated by the facilitator.
2. Using the client you created:
   (a) Add an item to the client's basic demographic information. Click **Save Changes** to save.
   (b) Add an item to the client's extended demographic information. Click **Cancel** to remove the item.
   (c) Add an item to the client's physical characteristics. Click **Reset** to start over and then **Save Changes** once you have re-entered the information.

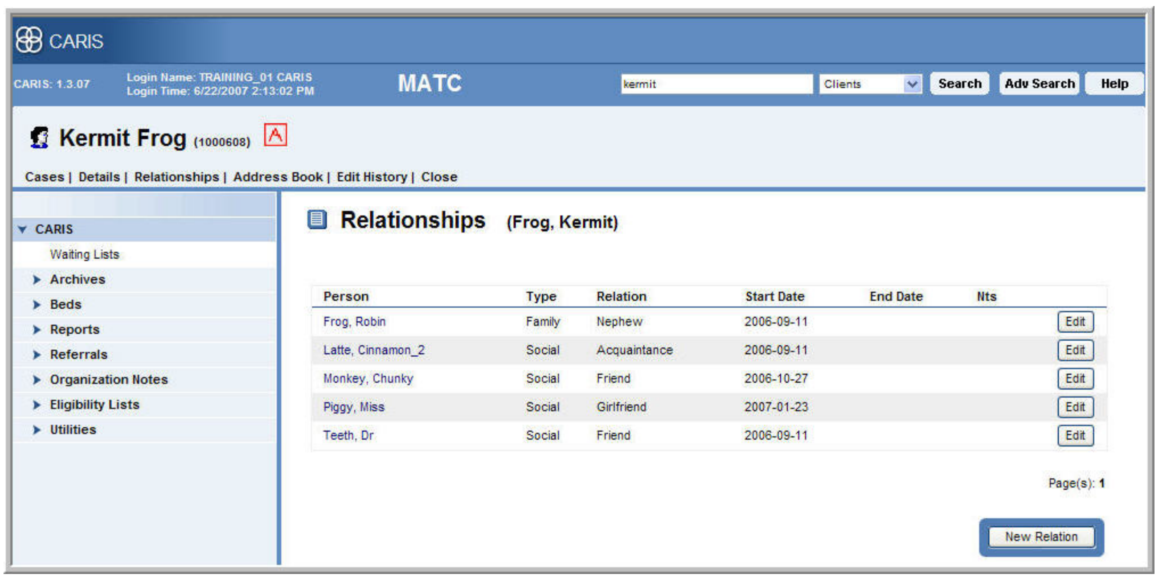
Create a Relationship

A Relationship is a person who is attached to a client or client's case as a person of interest to the client or the case worker. The relationship is for reference purposes only because the person has no access to the case.

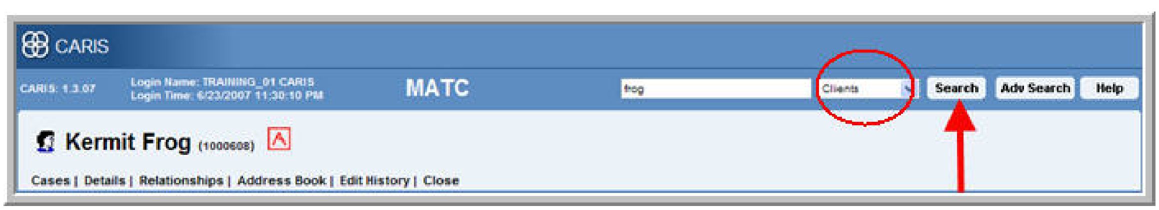
To create a Relationship,

Bring the client into context.

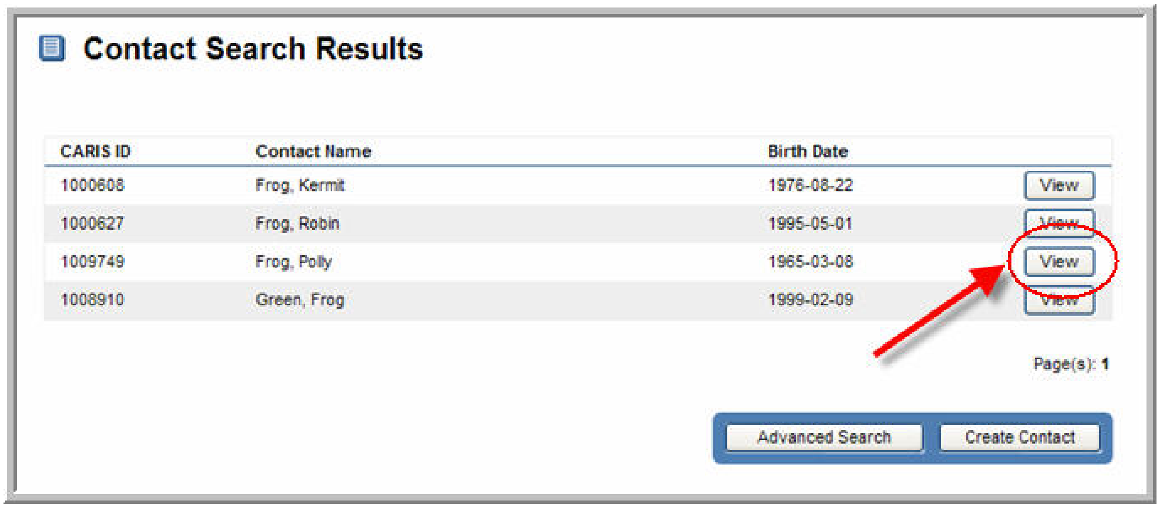
1. Open Relationships



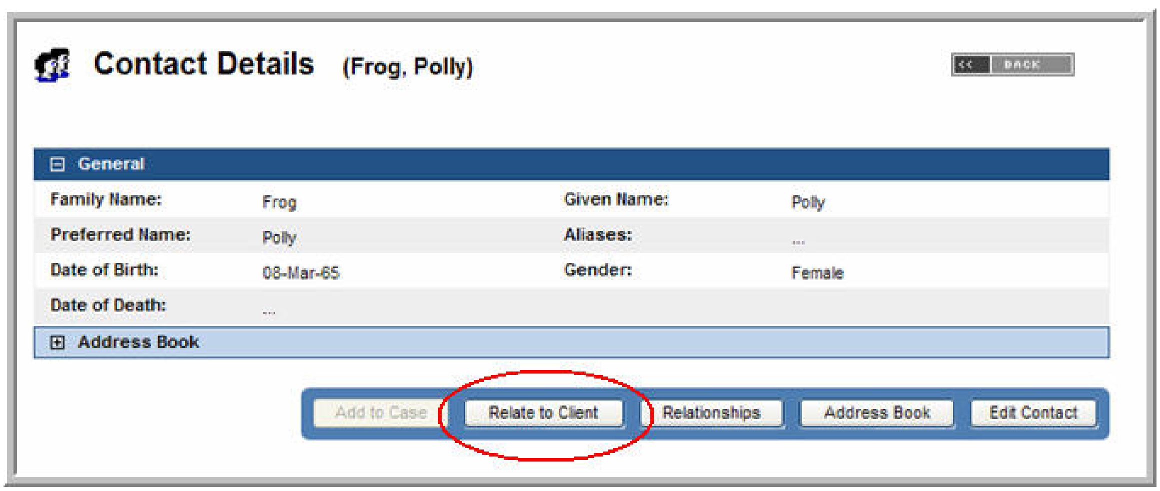
2. If the person is not already on the list, change the search filter to "Contacts", enter a name or part of a name in the open search field, and click **Search**.



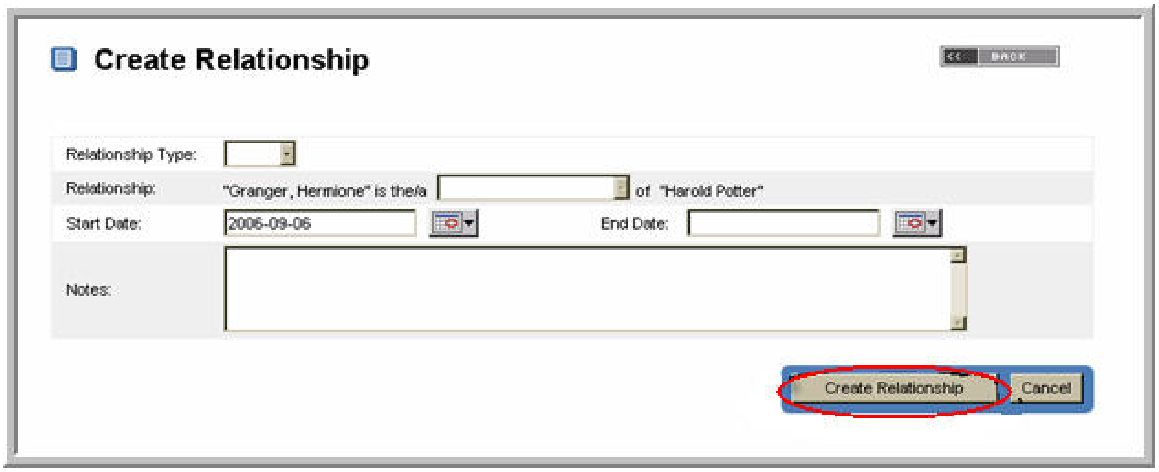
3. If the appropriate person is found, click **View**.



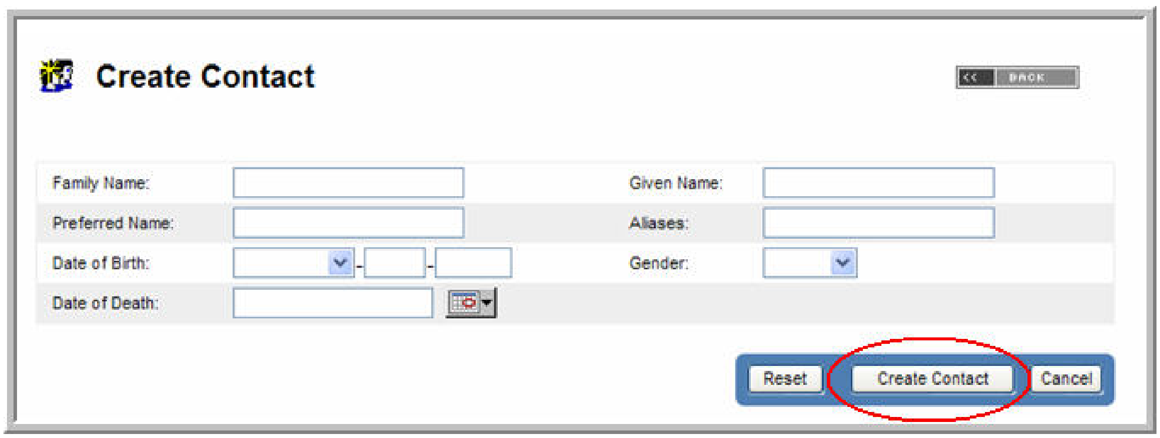
4. Click **Relate to Client**.



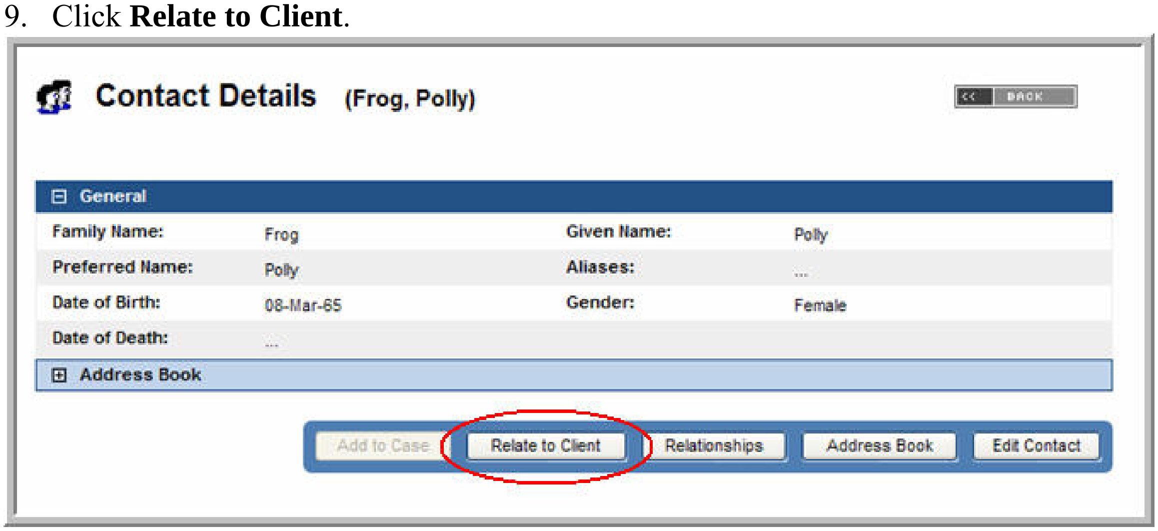
5. Select the "Relationship Type" and the "Relationship" from the list in the drop down box, add an "End Date", if appropriate, and enter text in the "Notes" field.



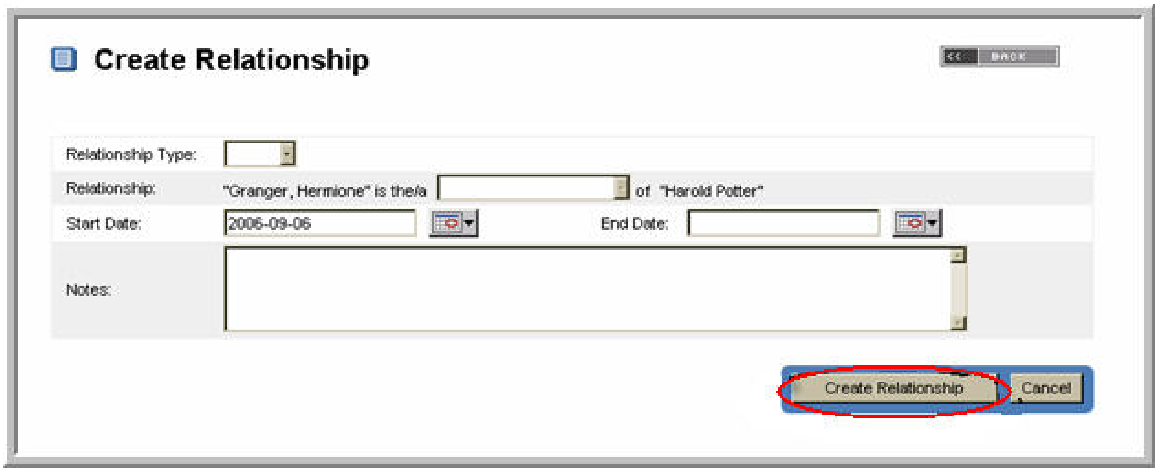
6. Click **Save Relationship**.
7. If the person does not exist, click **Create Contact.**



8. Complete as many fields as you can and click **Create Contact**. The minimum information required to create a contact is first name, last name, and gender.
9. Click **Relate to Client**.

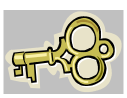


10. Select the relationship type (family or social). This will affect your choices for the next field. When you are finished filling in the fields, click **Create Relationship.**



The "Relationships" window will now include the new relationship.

Caution: All CARIS users in all program areas can read the information in the note box, so it should not be of a confidential nature.



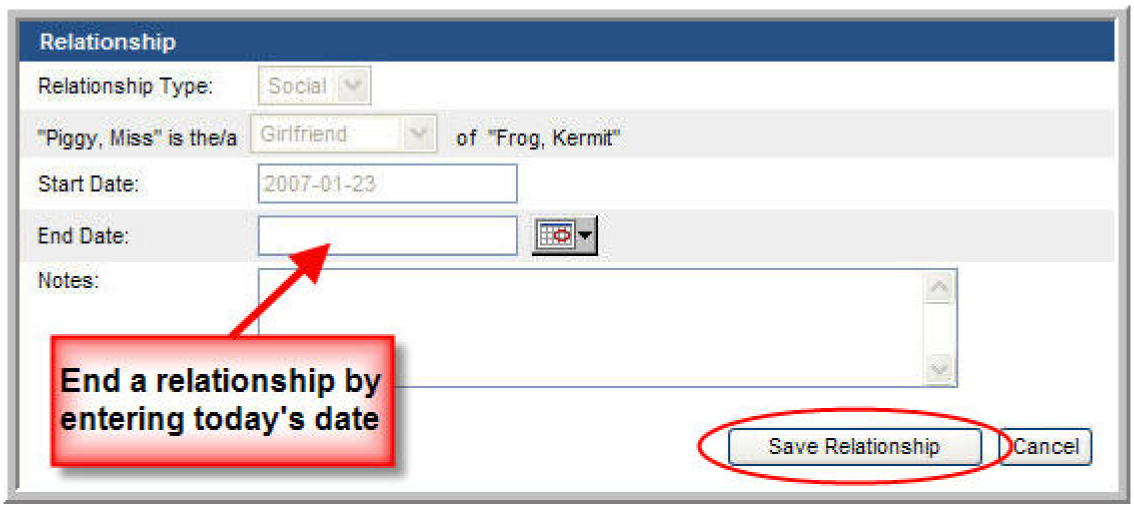
For any person who is related to a client, their address information is now part of the client's address book.

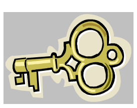
Update a Client's Relationships

With the Client in context

1. Open Relationships.
2. Click **Edit.**

3. Change the end date or add a note.
4. Click **Save Relationship.**



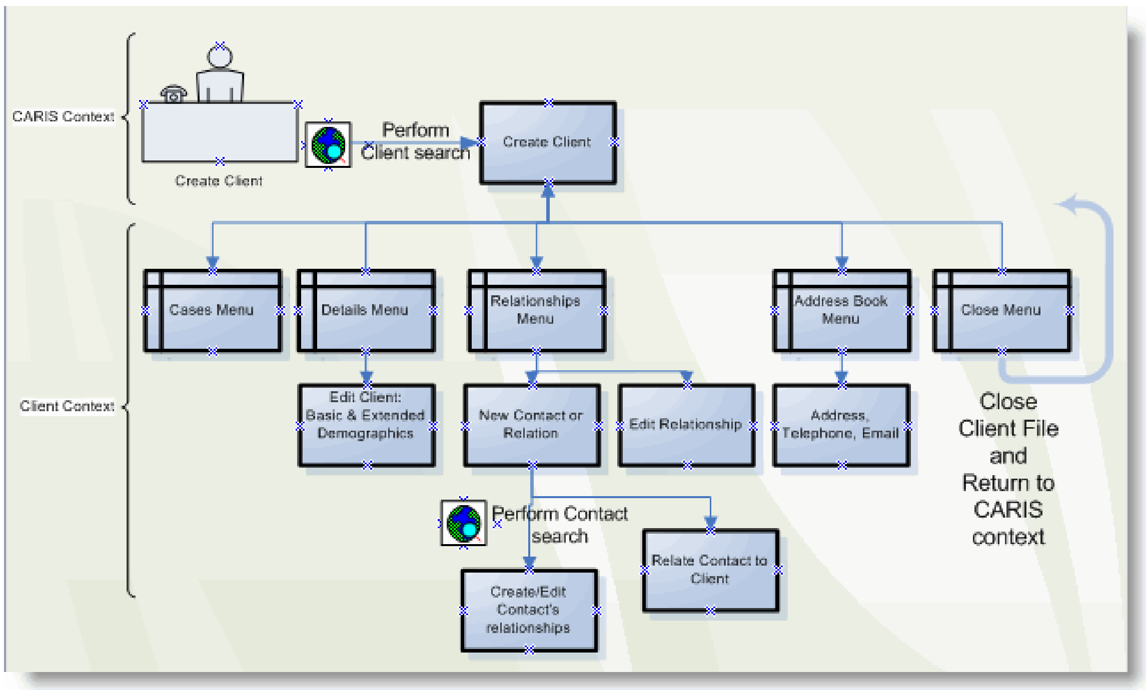


The only fields you can change are the end date and the notes. Once a relationship has been saved, you cannot change the relationship type. If you wish to change the type,

1. Click **Edit.**
2. Enter today's date as the "End Date".
3. Add a note about why you are doing this.
4. Click Save Relationship.

For relationships created in error, give the relationship and end date and add a note to the relationship that is was created in error.

Workflow Diagram

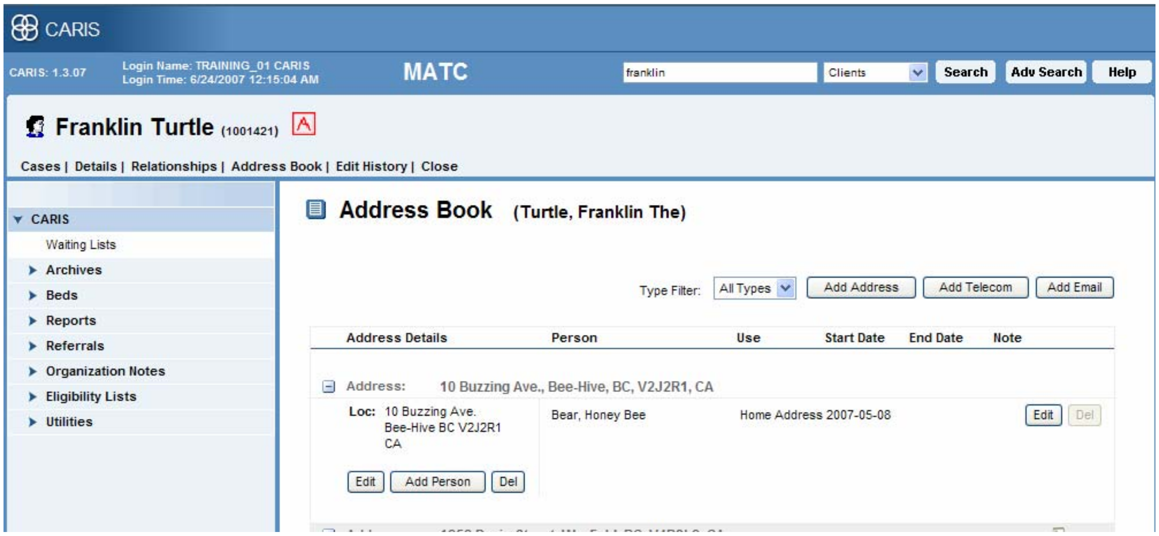


Exercise 2

1. For the client that you created, add two new relationships, one for a family relationship and one for a social relationship

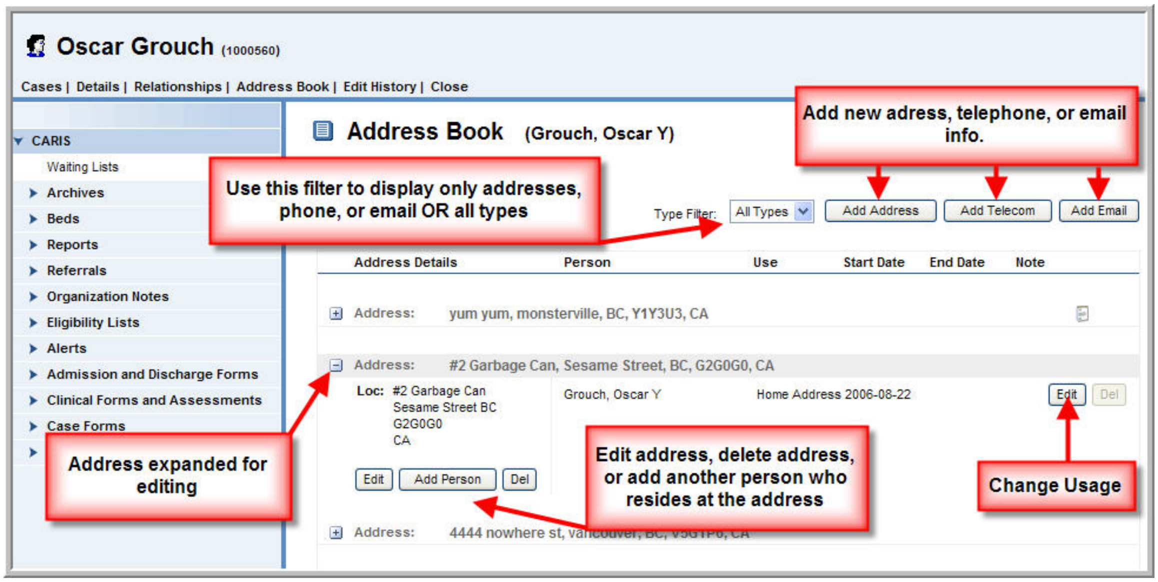
Adding and Updating Address Book Information

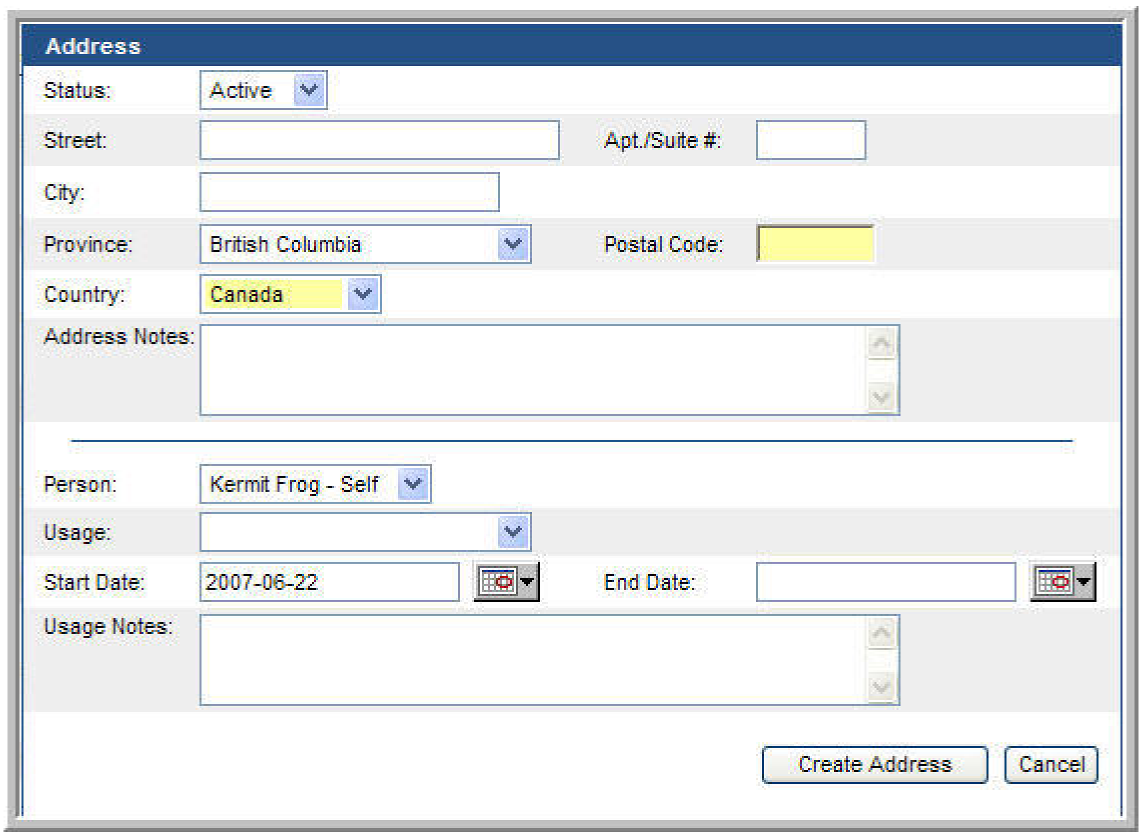
1. Open Address Book.

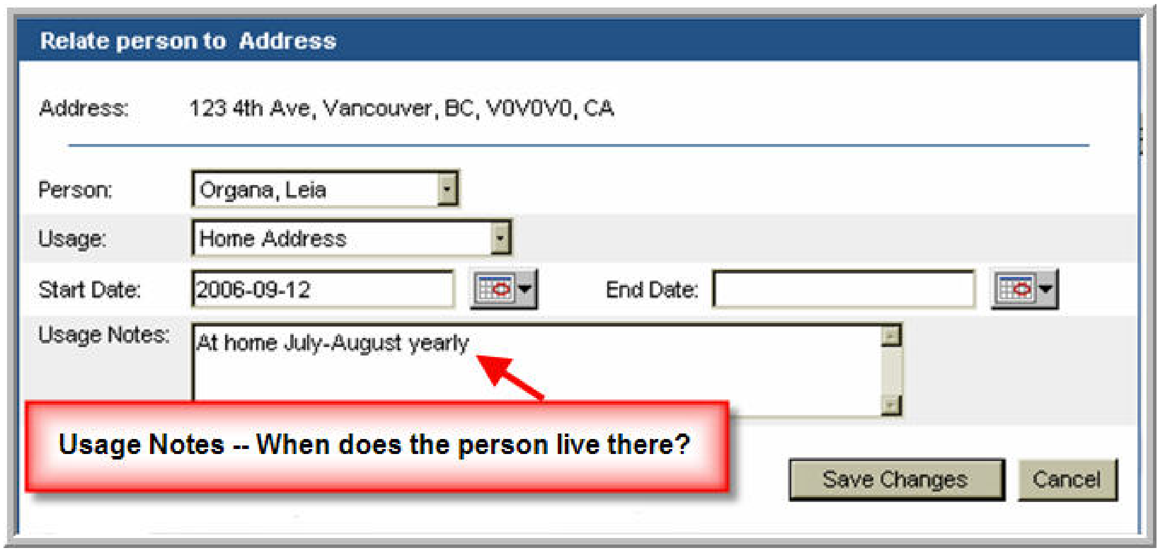


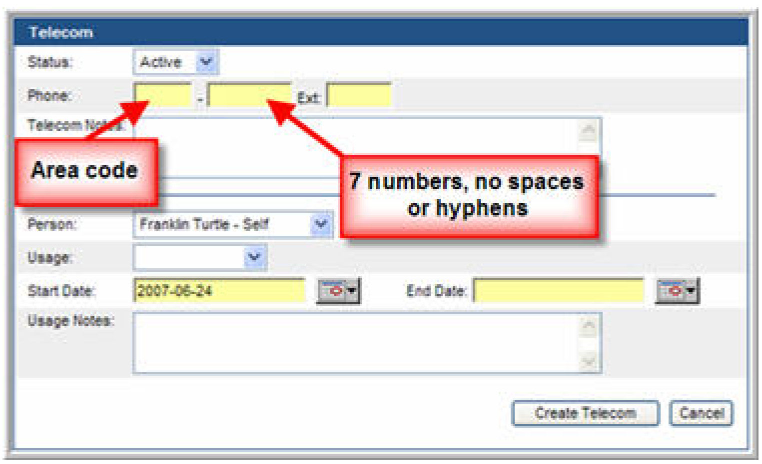
2. Click **Add Address** (or **Add Telecom** or **Add Email**).
3. Fill out the fields in the "Address" form and click **Create**.
4. To update an address, click the + sign next to the appropriate address. Click **Edit** to update the address, click **Add Person** to add another person to this address (i.e., a friend or family member that lives with the client) or **Del** to delete the address. Only addresses entered in error should be deleted. Addresses that are no longer current should be assigned an End Date. Save changes.

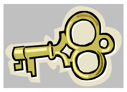
.


Oscar Grouch (1000560)
Cases | Details | Relationships | Address Book | Edit History | Close
CARIS
Waiting Lists
Archives
Beds
Reports
Referrals
Organization Notes
Eligibility Lists
Alerts
Admission and Discharge Forms
Clinical Forms and Assessments
Case Forms
Address Book (Grouch, Oscar Y)
Add new adress, telephone, or email info.
Use this filter to display only addresses, phone, or email OR all types
Type Filter: All Types
Add Address
Add Telecom
Add Email
Address Details
Person
Use
Start Date
End Date
Note
Address: yum yum, monsterville, BC, Y1Y3U3, CA
Address: #2 Garbage Can, Sesame Street, BC, G2G0G0, CA
Loc: #2 Garbage Can Sesame Street BC G2G0G0 CA
Grouch, Oscar Y
Home Address 2006-08-22
Edit
Del
Edit
Add Person
Del
Address expanded for editing
Edit address, delete address, or add another person who resides at the address
Change Usage
Address: 4444 nowhere st,


Address
Status: Active
Street:
Apt./Suite #:
City:
Province: British Columbia
Postal Code:
Country: Canada
Address Notes:
Person: Kermit Frog - Self
Usage:
Start Date: 2007-06-22
End Date:
Usage Notes:
Create Address
Cancel


Relate person to Address
Address:
123 4th Ave, Vancouver, BC, V0V0V0, CA
Person:
Organa, Leia
Usage:
Home Address
Start Date:
2006-09-12
End Date:
Usage Notes:
At home July-August yearly
Usage Notes -- When does the person live there?
Save Changes
Cancel


Telecom
Status:
Active
Phone:
Ext:
Area code
7 numbers, no spaces or hyphens
Person:
Franklin Turtle - Self
Usage:
Start Date:
2007-06-24
End Date:
Usage Notes:
Create Telecom
Cancel



Clients can have more than one address – as for example, a home address, an emergency contact address, or an alternate address. Addresses are sorted by the last date entered. If a client has more than one address, addresses with an active status will appear at the top of the list.

Address information for any persons related to the client will also appear in a client's address book.

Address information is not secure so nothing in the address should suggest that the individual is a client.

The format for the postal code is Letter – Number – Letter (no space) Number – Letter – Number.

An address is required to admit a case. Mandatory fields include aboriginal status ("unknown" is a valid status), guardianship, postal code, and address.

The context menu item "Edit History" provides an audit trail of all changes to extended demographic information.

Exercise 3

1. Using the client you created, add a home address, an emergency address, and an address that is using during school breaks.

Learning Checkpoint

1. (a) To update a client's demographic information, what context do you need to be in?

____

(b) Which of the client actions (Cases, Details, Relationships, Address Book, Close) do you click to do this update?

____

2. Name the two available relationship types. What happens when you select one of the two types?

____

____

3. Where would you expect to find the address of a family member or friend of a client?

____

Module 4: Working with Cases

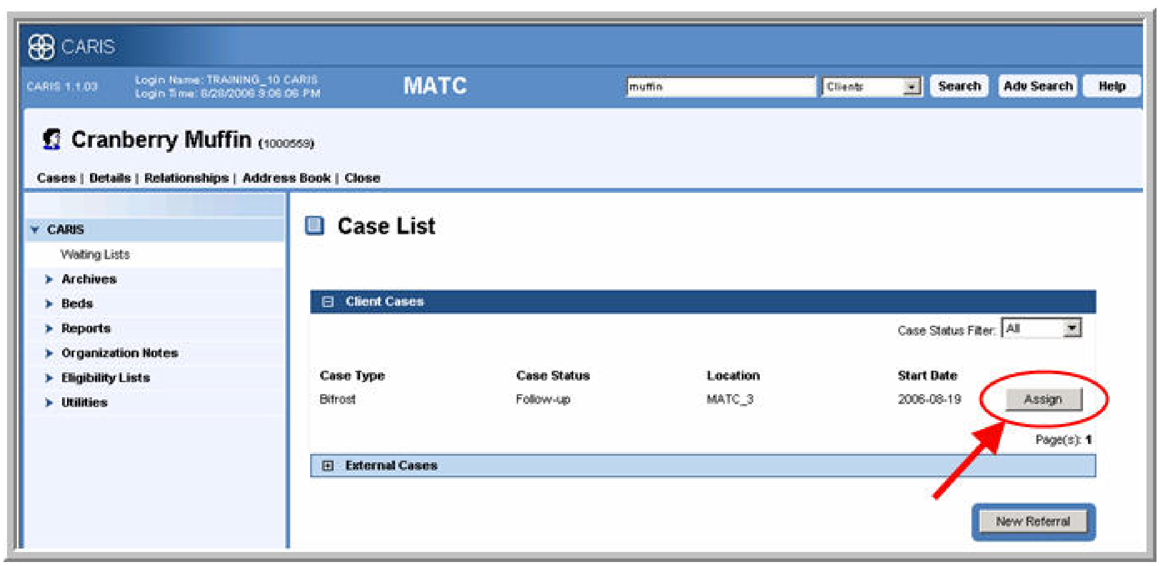
At the end of this module, participants will be able to:

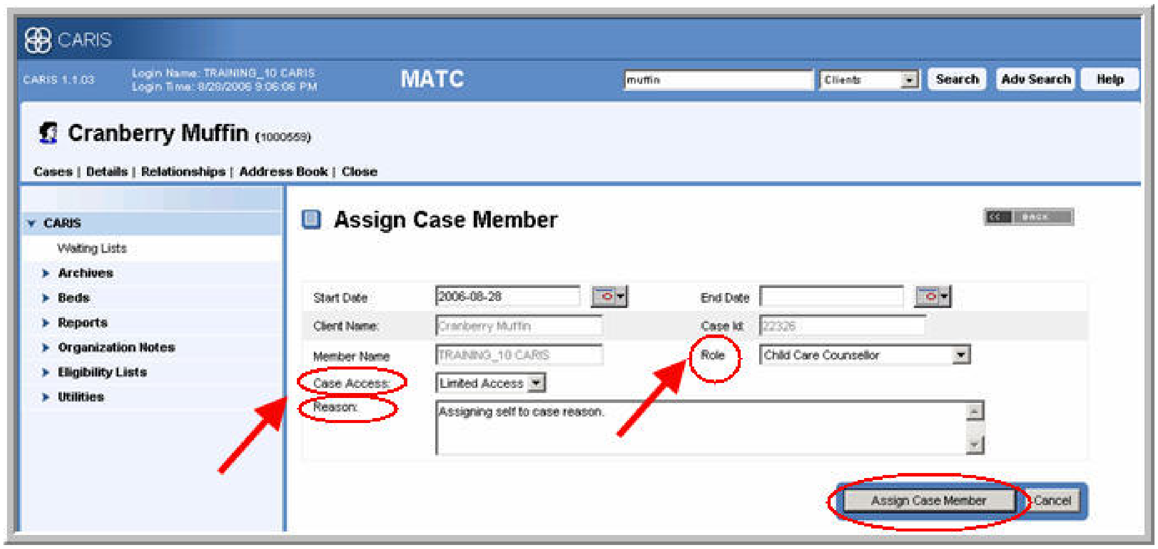
1. Assign self to case.
2. Add participants to a case.
3. Use Case History to find activities.
4. Create Alerts.

Assign Self to Case

To be able to assign yourself to a case, you must have worked with the client before.

1. Search for the client. Click Cases.
2. Click **Assign** next to the appropriate case.
3. You must provide a reason for assigning yourself to the case. You must also choose a role and select the access level.





Exercise 1

1. Search for a client and assign yourself to the case.

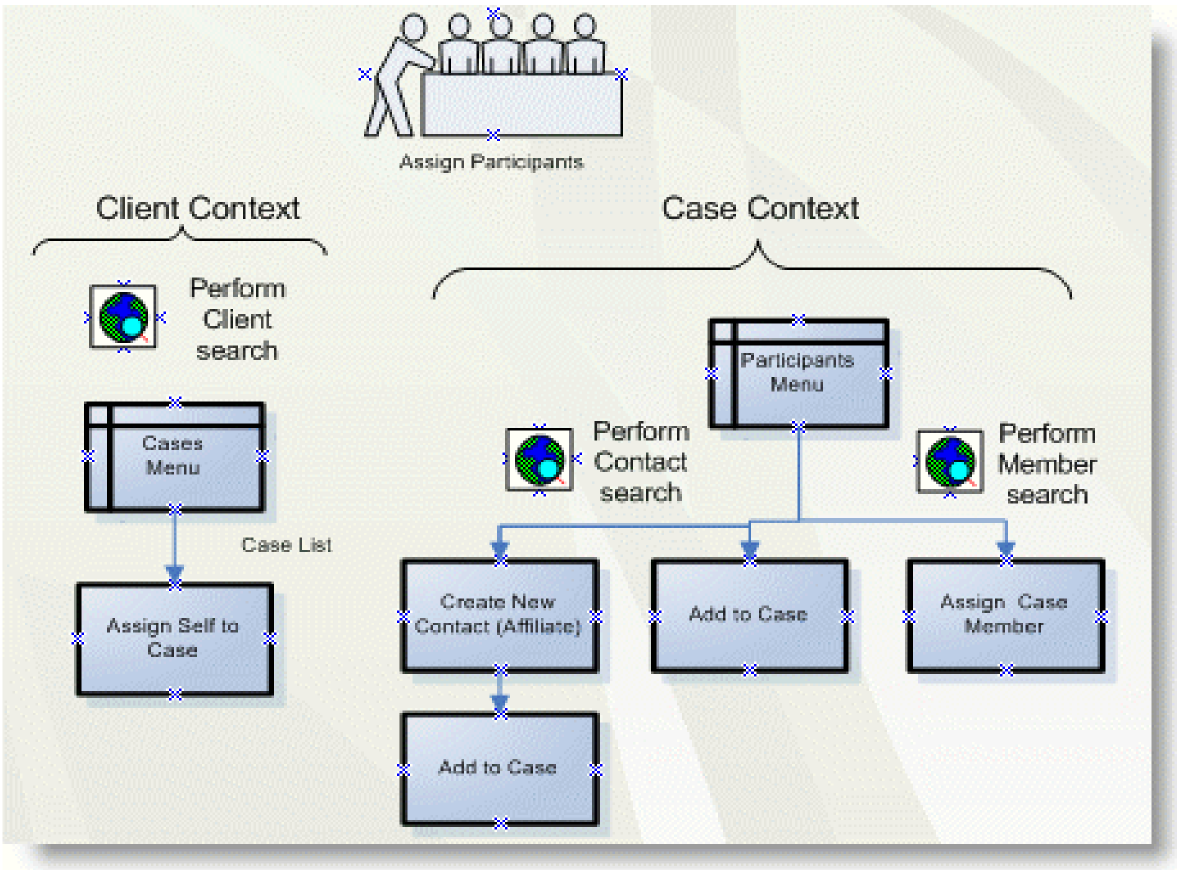
Add Case Participants

Once you have a Referral, you can add people who will need to have access to the case. A case Participant can be either a Member or an Affiliate.

An Affiliate is someone who has a direct or indirect interest in a particular case. An affiliate is typically a physician, a case worker from another agency, or a probation officer.

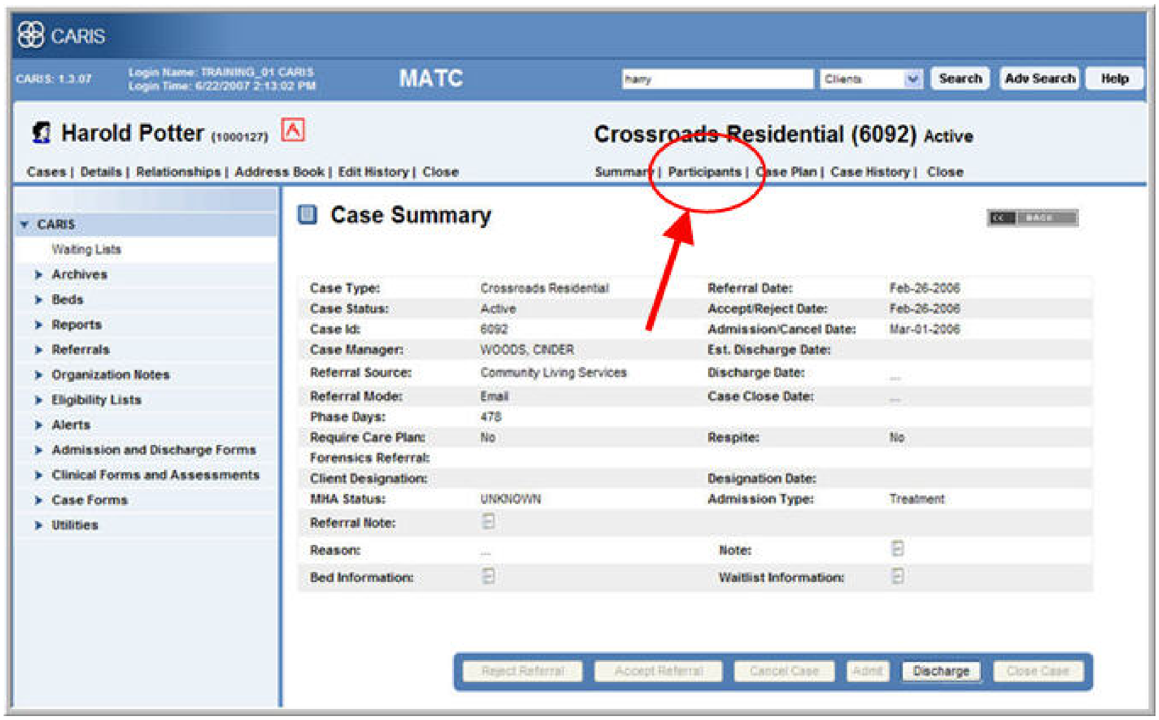
A Member is a person who has access to the case files and who is actively involved in the case. You can appoint a member to one of your cases from the list of members only if you are the Case Manager. (Note: Case Managers who are not Maples employees are considered Community Case Managers in CARIS and are added to a case as an Affiliate. Social Workers with guardianship status are added to the case as non-relatives with a note on their guardianship role.)

Workflow Diagram - Add Case Participants



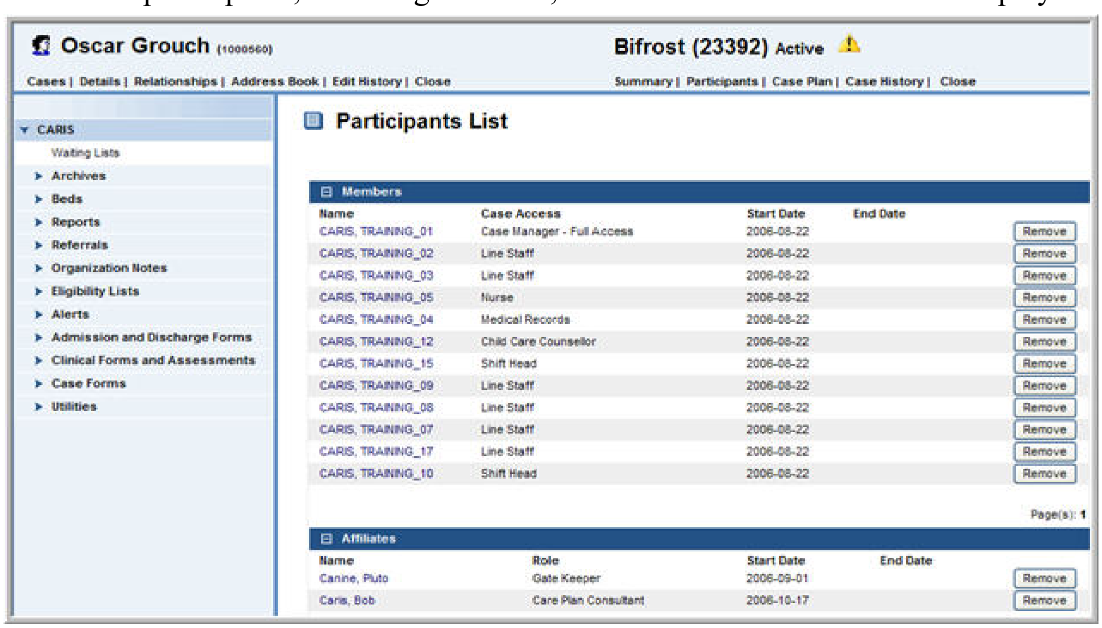
Add an Affiliate to the Case

To add an affiliate to a client's case file, the client and case must be in context.



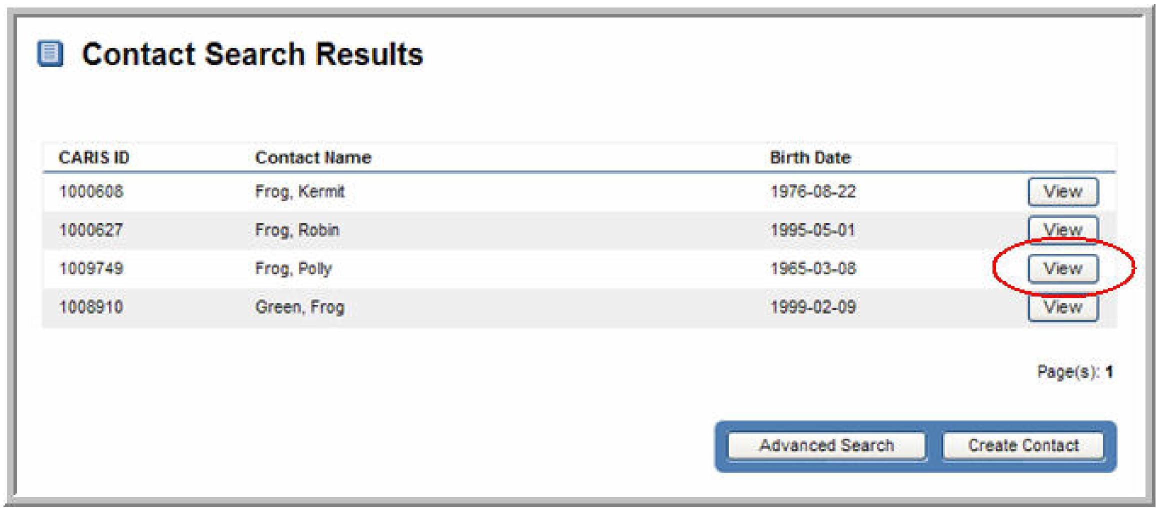
1. Open Participants

The list of participants, including affiliates, attached to the client/case will display.

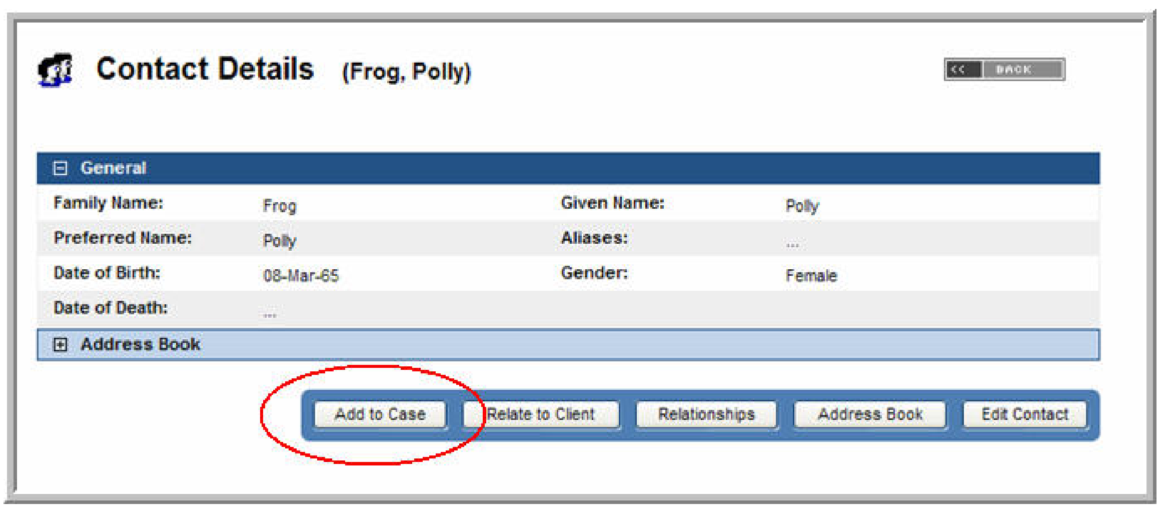


To add a new affiliate to the list,

2. Perform a Contact search, and if the contact is in the system, they will display.
3. Click **View.**

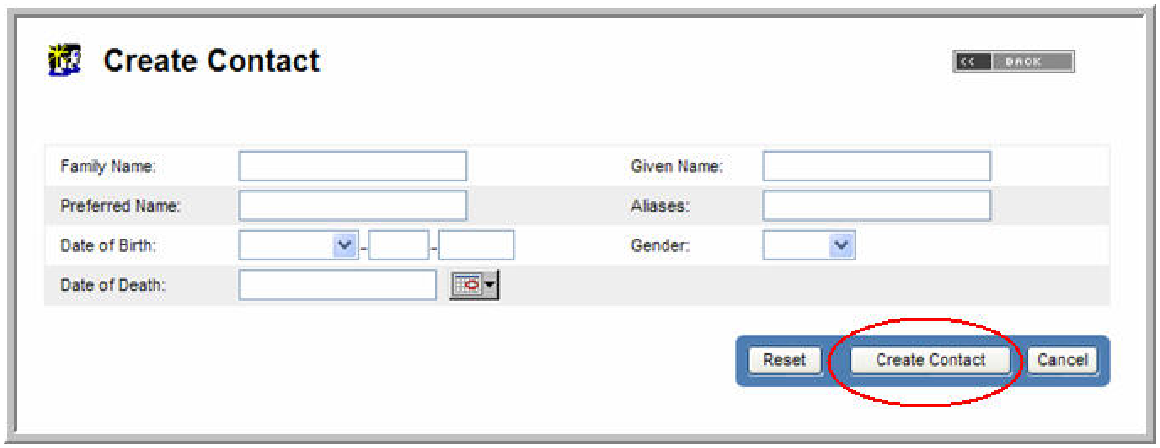


4. Click **Add to Case**.

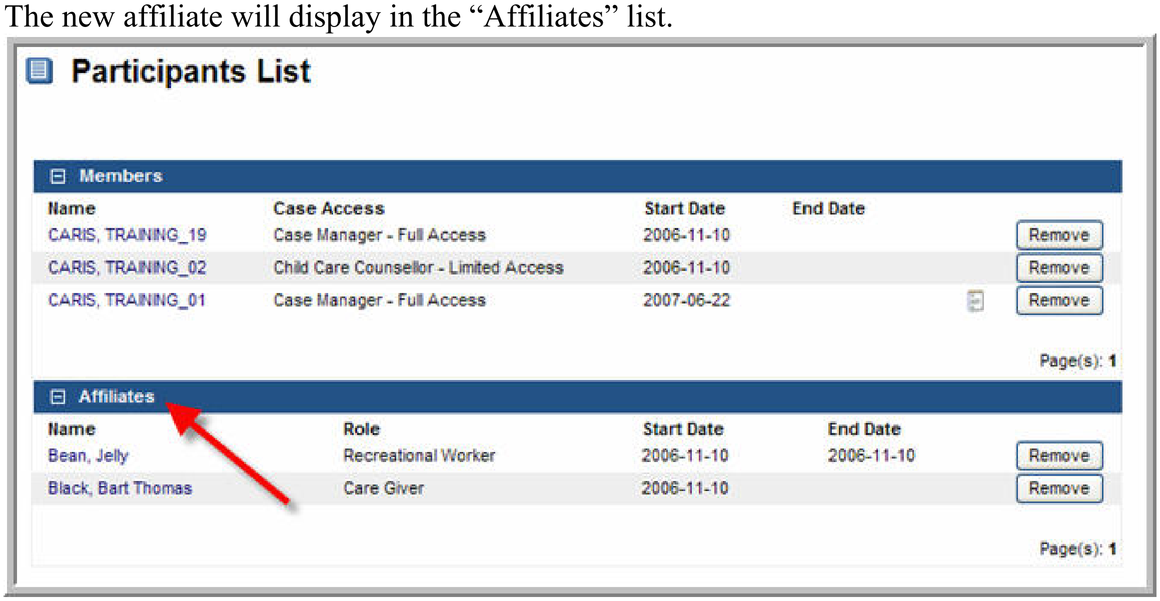


5. Click **Add Case Affiliate**.

If the person is NOT in CARIS, try their name spelled differently or perform an advanced search. If they still don't show up, click **Create Contact** and fill in the appropriate dates and information. Once you have created the new contact, repeat as above for existing contacts.



The new affiliate will display in the "Affiliates" list.



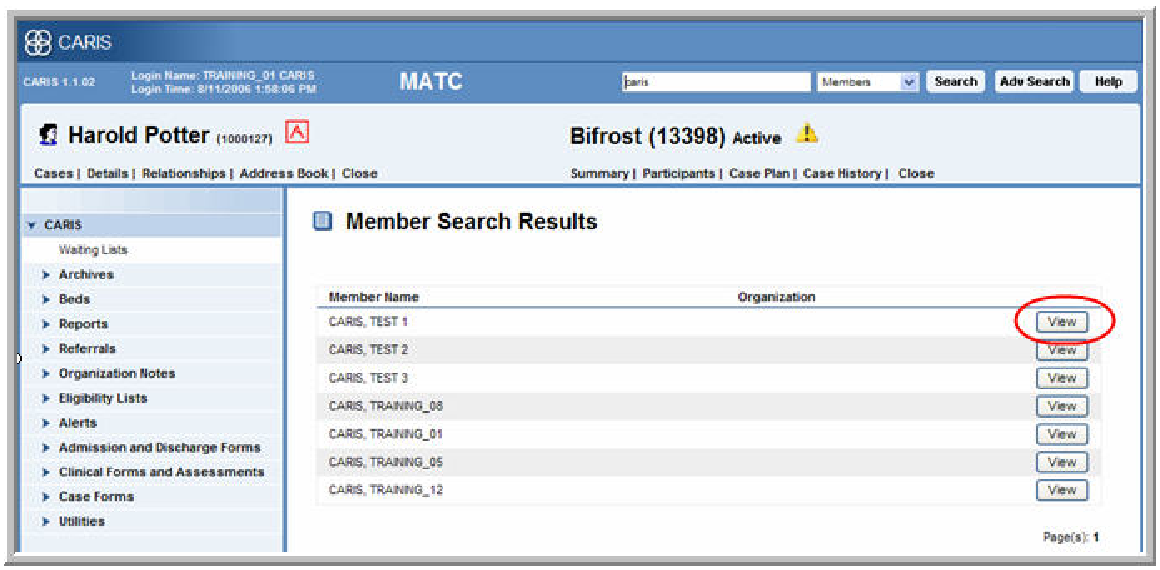
Exercise 2

1. Choose an active case from My Cases. Add two case affiliates, one for an affiliate that is already in the database and one for a new affiliate.

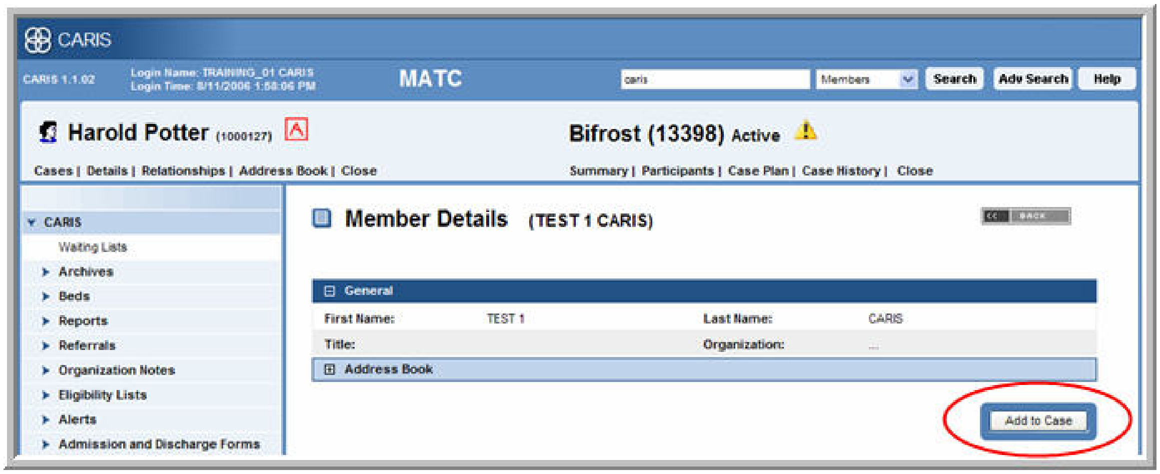
Add a Member to the Case

To add a member to your case,

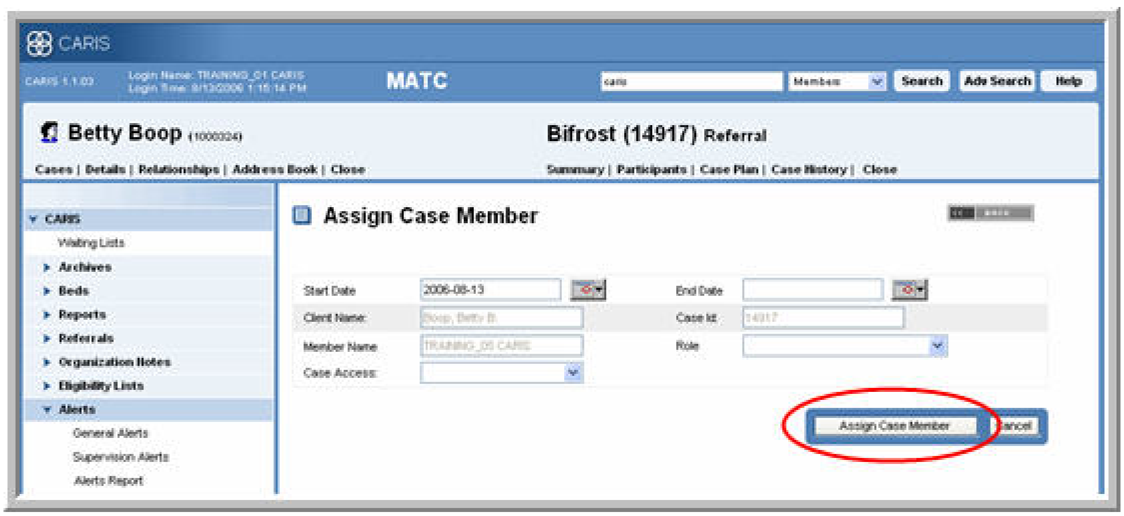
1. Bring the case into context.
2. Open Participants.
3. Perform a Search for the member you wish to add to the case.
4. Select the member you want from the list and click **View**.



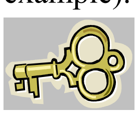
5. Click **Add to Case.**



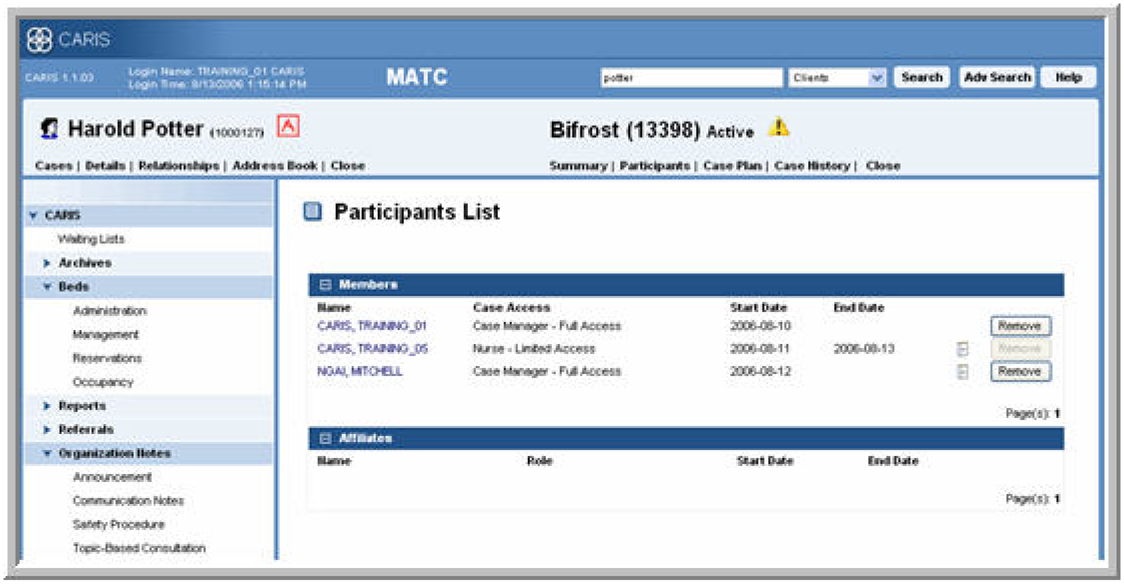
6. Use the calendar to set “Start Date” and “End Date”. The start date will default to today’s date. The member’s role must be selected (case manager, case worker, etc) because the role determines the case access.
7. **Click Assign Case Member.**



The member will now be included in the Participants List as a “Case Manager” (in this example).



Members added to a case cannot be deleted from the database. Their membership in a case can be ended by clicking **Remove** on the Participant’s List. Clicking **Remove** adds an “End Date” but does not remove the record from the case.

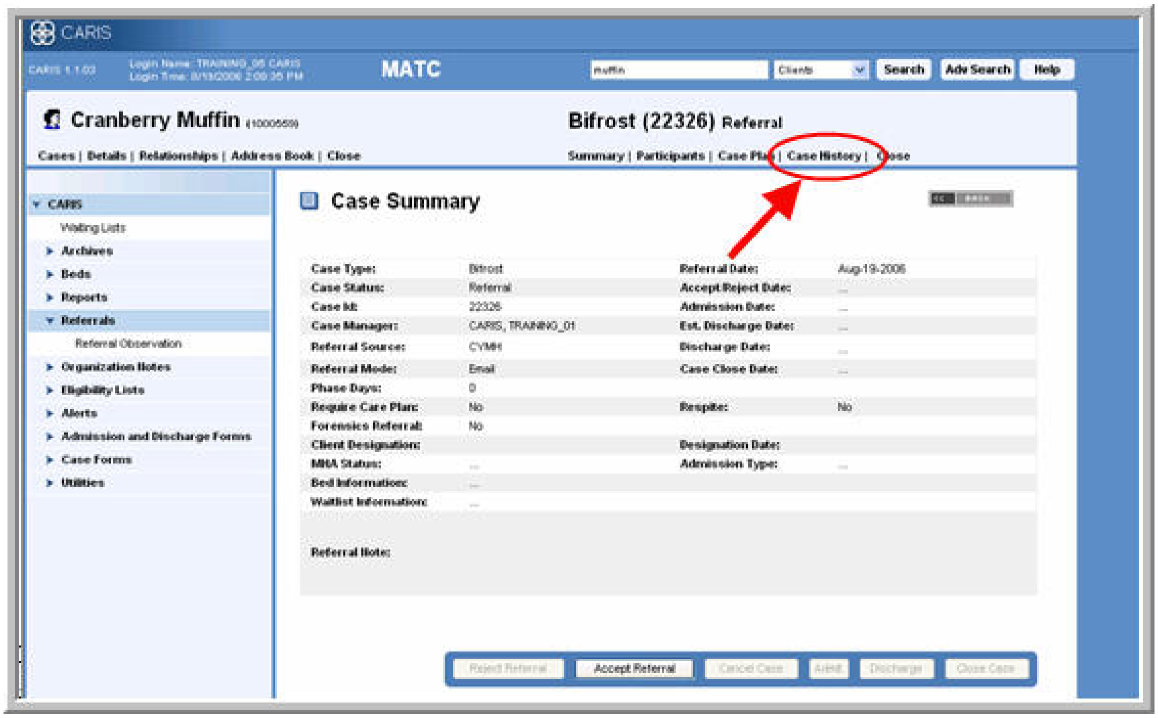


Exercise 3

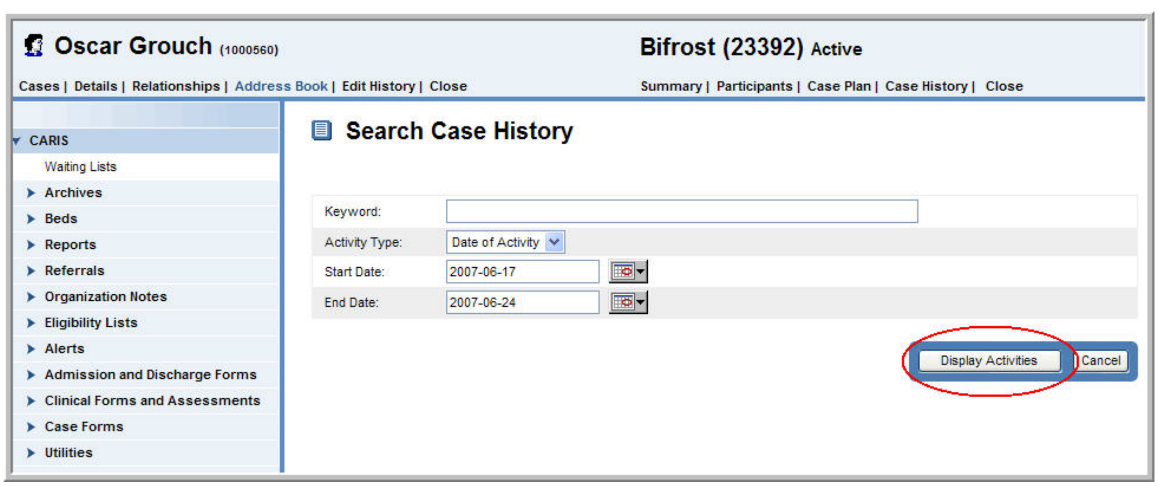
1. Add a new member to one of your cases. Because this is the training site, you will need to search for "CARIS" to add another CARIS training ID to your case.

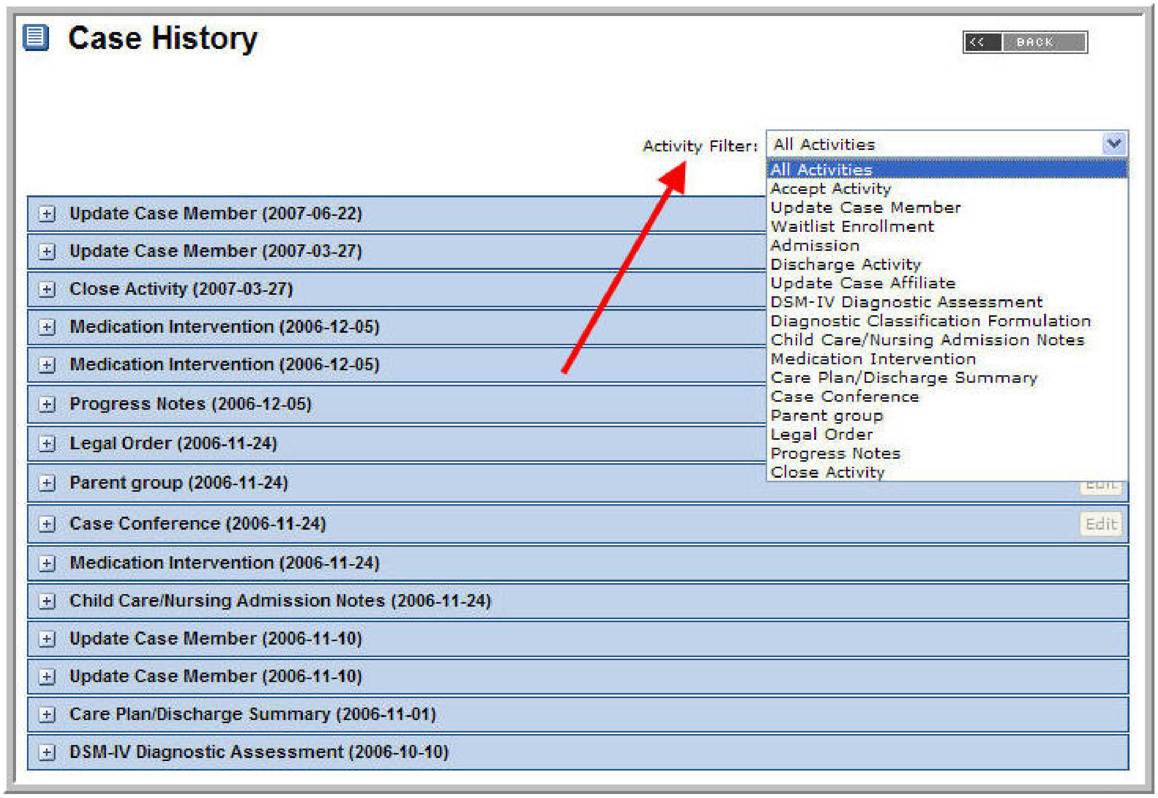
View Case Summary

To view the case summary, you need to be in Case context. Open **<u>Case History</u>**.

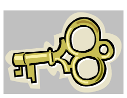


You can click **Display Activities** to display the client's full history or you can filter the history by activity type (date of entry or date of activity), start date, and end. It is also possible to search the notes by using a keyword.





You can filter the case history further by choosing one of the activity filters.

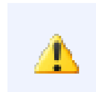


This feature could be used, for example, to obtain an update on a client following vacation. By entering the start and end date and then filtering by **Progress Notes**, a list of all the relevant notes will appear.

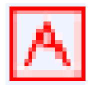
Note the "Start Date" and "End Date" default is for 7 days.

Create an Alert

There are 2 types of alerts in CARIS:



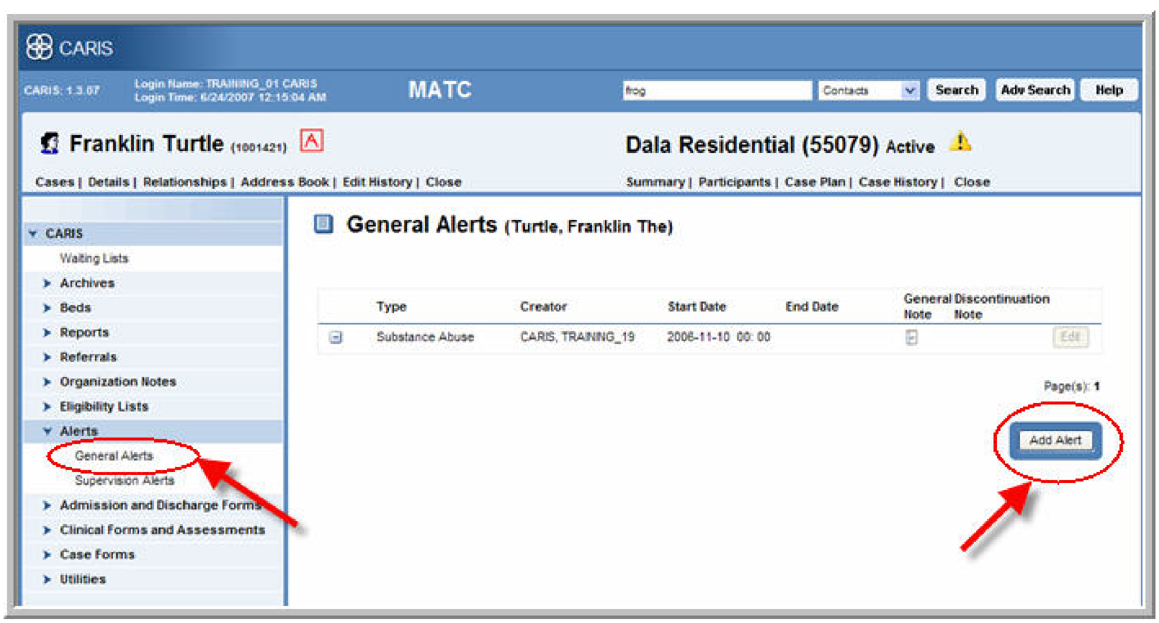
Supervision Alert – temporary alert generated to indicate that a client requires some special attention or supervision for a period of time. Only case members can view a supervisory alert. For the Maples, these alerts are available for active residential case types only. Alerts can not be created for less than 24 hrs.



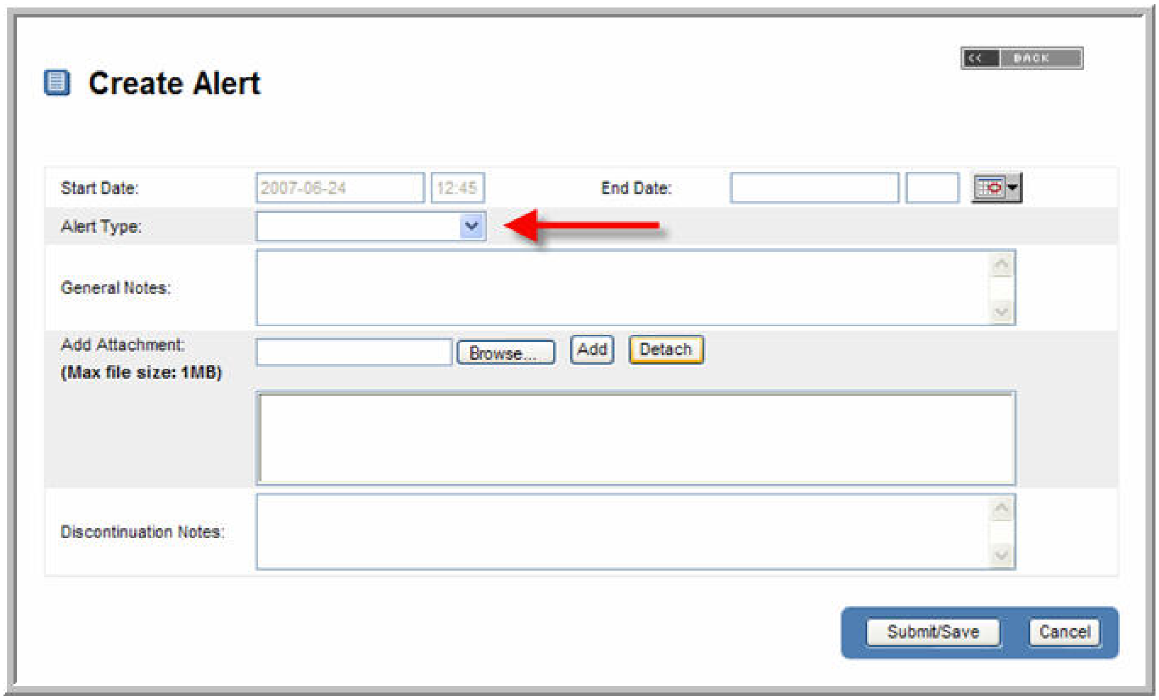
General Alert – include alerts related to allergies, medical conditions, aggressive behaviours and the like. Anyone with access to CARIS can view a general alert.

To add an alert to a client's file, the client must have a case open.

1. Open Alerts in the Navigation Tree.
2. Choose the type of Alert you wish to generate.
3. Click **Add Alert.**

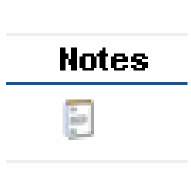


4. Select the type of Alert from the drop down list.



5. Enter any pertinent information in the "Notes" field. You can also attach documents here by clicking **Browse,** locating the document on your drive, and then clicking **Add.**
6. Click **Submit/Save.**

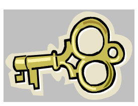
The Alert is now attached to the client's file and an appropriate icon appears in the Context Bar indicating that an alert has been generated. If you click on this icon, you will see some of the information. Click on the "Notes" icon to display the attached note.



If you wish to remove the note, or make changes,

1. Click **Edit.**
2. Change the notes, attachments or End Date.
3. Click **Submit/Save.**

To print the note of an alert, you must view the attachment and save it to your desktop to print it.



When you discontinue an alert, the discontinuation note does not print on the Alerts Report. Include the discontinuation in the General Notes field until this is fixed.

The person who created the alert is the only one who can edit an alert. General Alerts can be viewed by other Program Areas but the only information that is provided is the category: Safety or Health.

Exercise 4

1. Add a general alert to the client you created in a previous module. Your client has lost a hand (and a lot of blood) and needs to be watched closely.

Learning Checkpoint

1. What are the two types of participants that can be added to a case?

2. How do Members differ from Affiliates?

3. When you use the keyword search function in Case History, what field is being searched?

4. What are the two types of alerts?

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Module 5: Developing Case Plans

At the end of this module, participants will be able to:

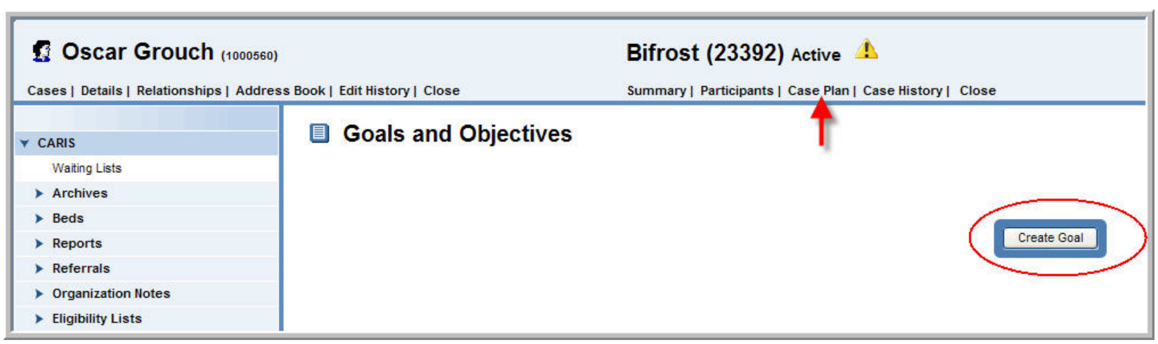
1. Create a case plan for a client.
2. Modify a case plan.

In CARIS a case plan is comprised of goals, objectives, and actions. Objectives are attached to goals, and actions are attached to objectives.

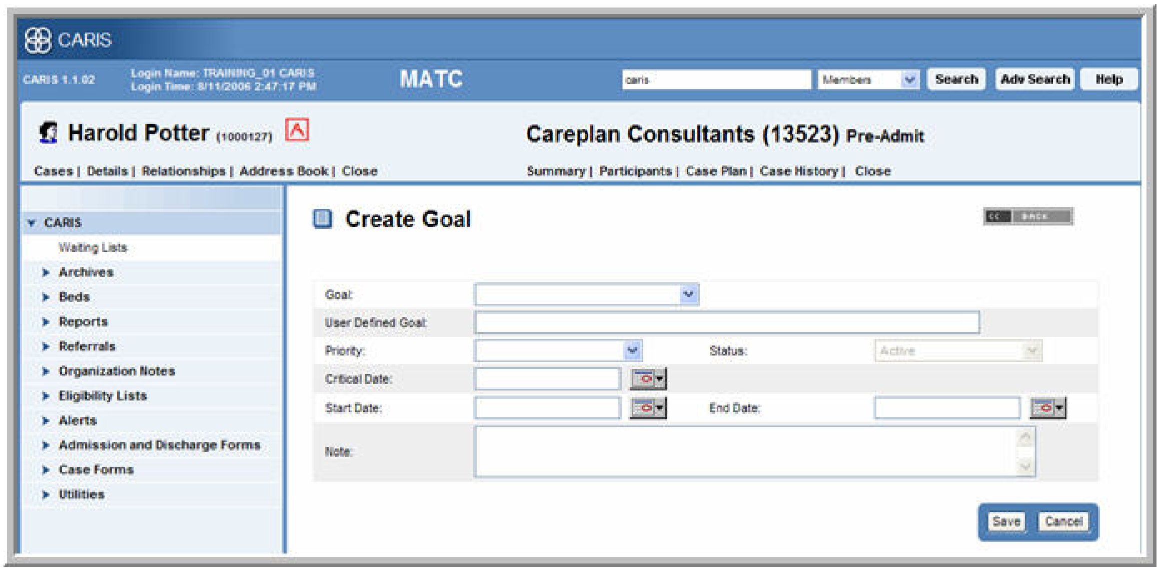
Create a Goal

To create the goal, bring the Case into "Context".

1. Open Case Plan.
2. Click **Create Goal**.



3. Select "Goal" and "Priority" from the list in the drop-down box, select a "Start Date", a "Critical Date", and an "End Date", and add text to "User Defined Goal" and "Note" fields.
4. Click **Save,** the Goal will be saved with a status of "Active". Note that until the goal is saved, the "Status" is *greyed* out.

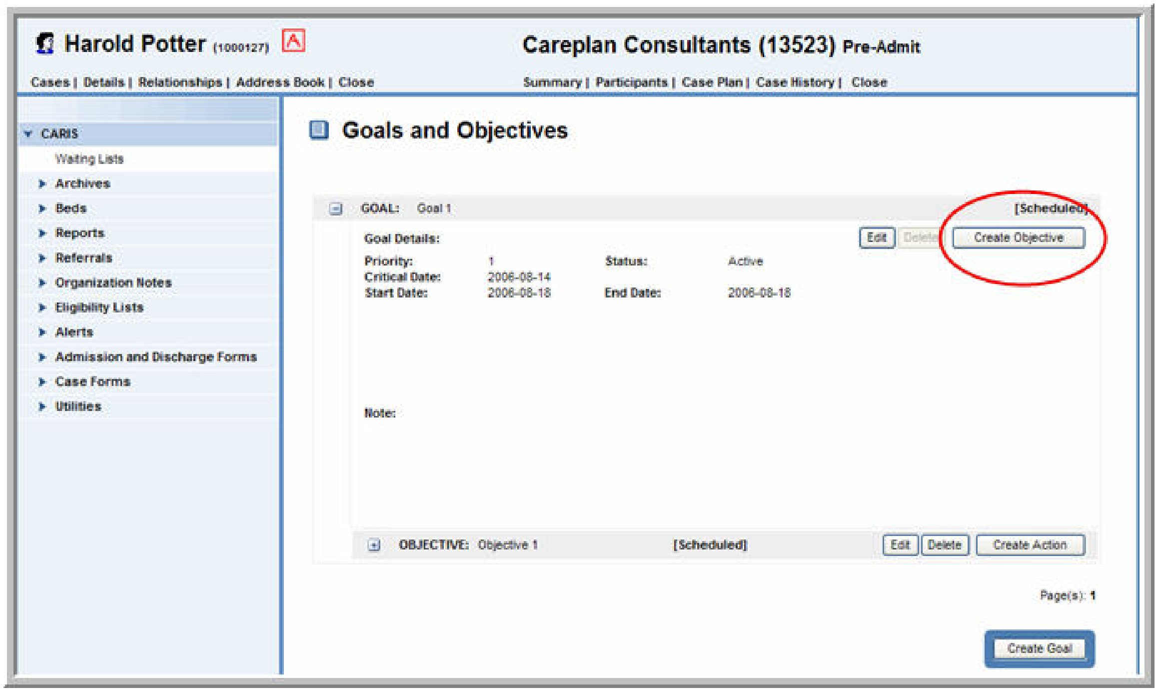


Create Objectives

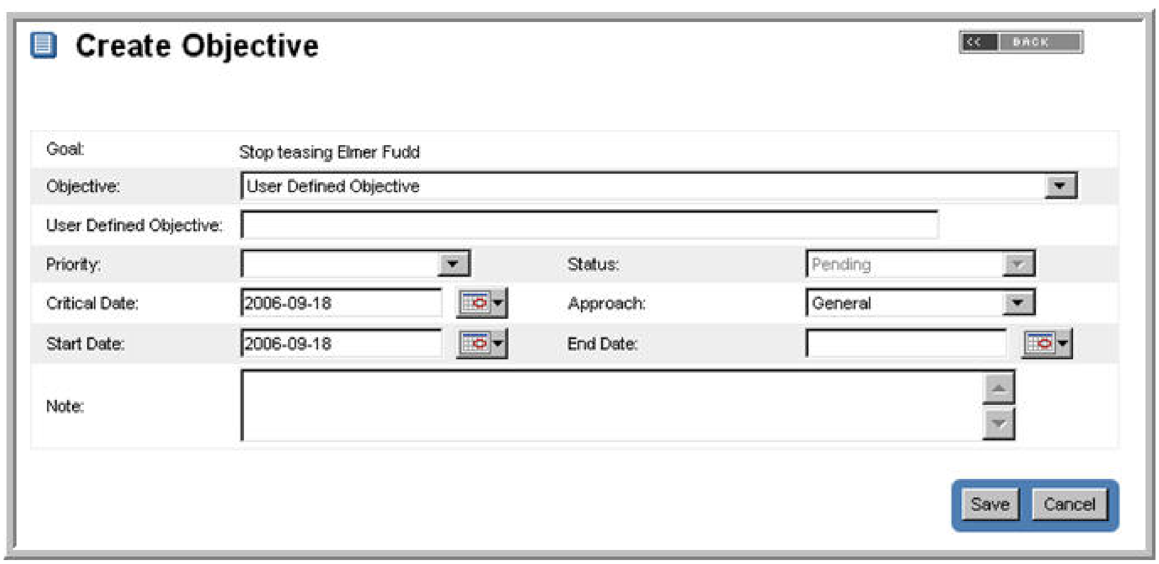
When a Goal has been defined and saved, you can add one or more objectives to the goal. Bring Client's Case into context.

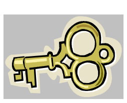
1. Open Case Plan.

Expand the appropriate Goal by clicking the + sign.
Click Create Objective.



2. Select “Priority”, and “Status” from the list in the drop-down box, select a “Critical Date” and an “End Date”, and add text to “Action” and “Note” fields.
3. Click **Save.**



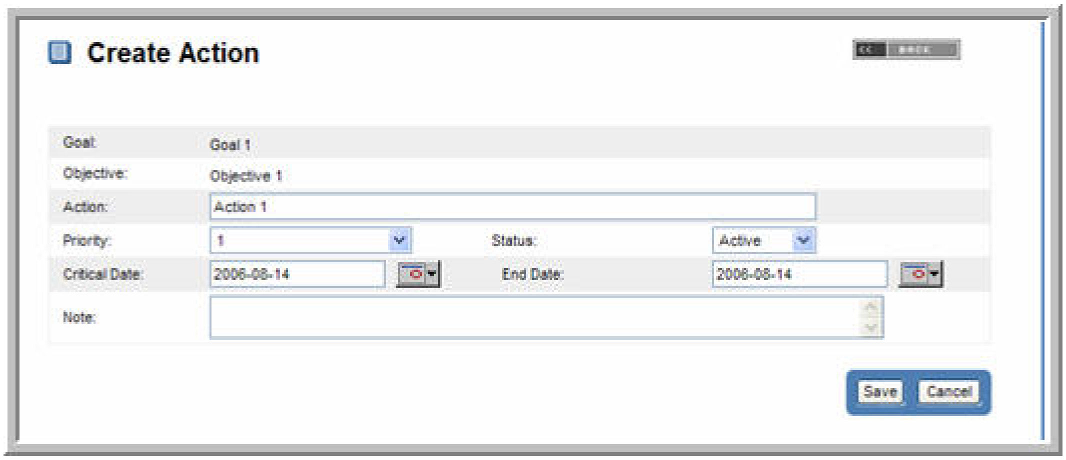


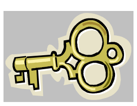
You can have several objectives for a given Goal, but you have to create each one separately.

Create Actions

When an objective has been defined and saved, you can add one or more actions to the goal.

1. Bring Client's Case into context.
2. Open Case Plan.
3. Expand the appropriate Objective by clicking the + sign.
4. Click **Create Action.**
5. Select "Priority" and "Status" from the list in the drop-down box, select a "Critical Date" and an "End Date", and add text to "Action" and "Note" fields.
6. Click **Save.**





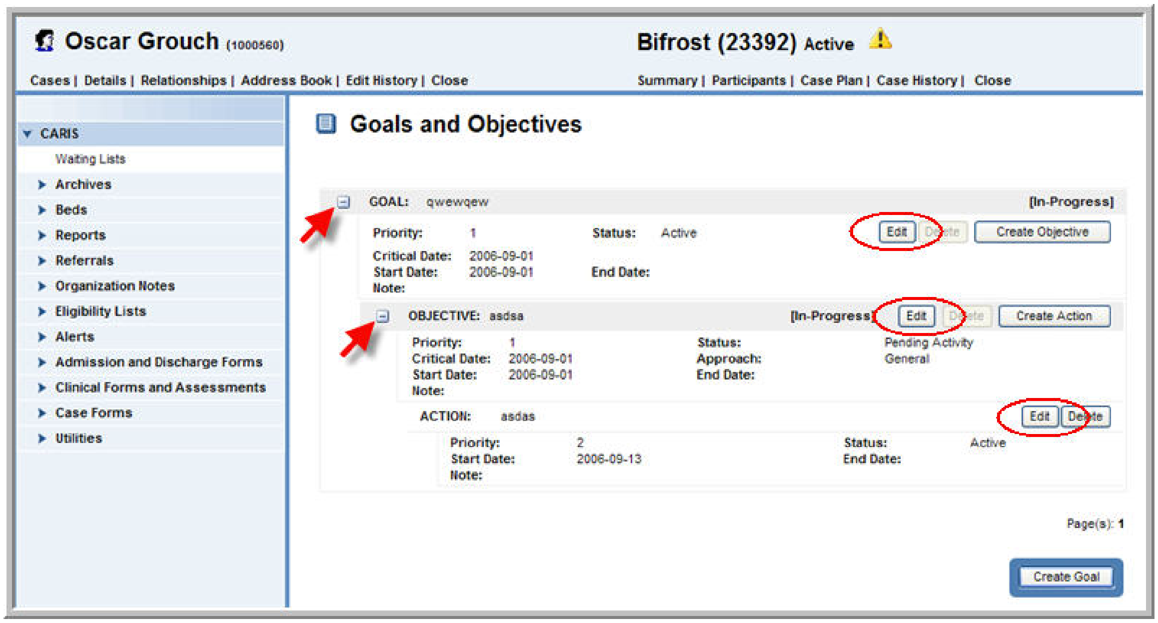
You will note that this button is in the "Objectives" part of the display. You cannot create an Action until you have decided on an Objective.

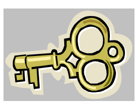
The Action will be appended to the Goals and Objectives list.

View and Edit a Goal, Objective or Action

Now that the goal, objective or action is created, you can view or edit it by:

1. Bringing the client's case into context.
2. Open Case Plan.
3. Expand the Goal/Objective/Action by clicking on the + sign and click **Edit.**





The case plan, once created, is attached to certain forms. Any forms attached to a case plan are accessible through Case Plan as well as Case History.

Goals are sorted based on date and time entered, not by priority.

All actions or objectives must be completed before you may complete a Goal.

Exercise 1

1. Open a case for the client you created in a previous module and create a case plan. Create a goal, an objective, and two actions.

Learning Checkpoint

1. What are the three components of a case plan?

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2. How do you access your client's case plan?

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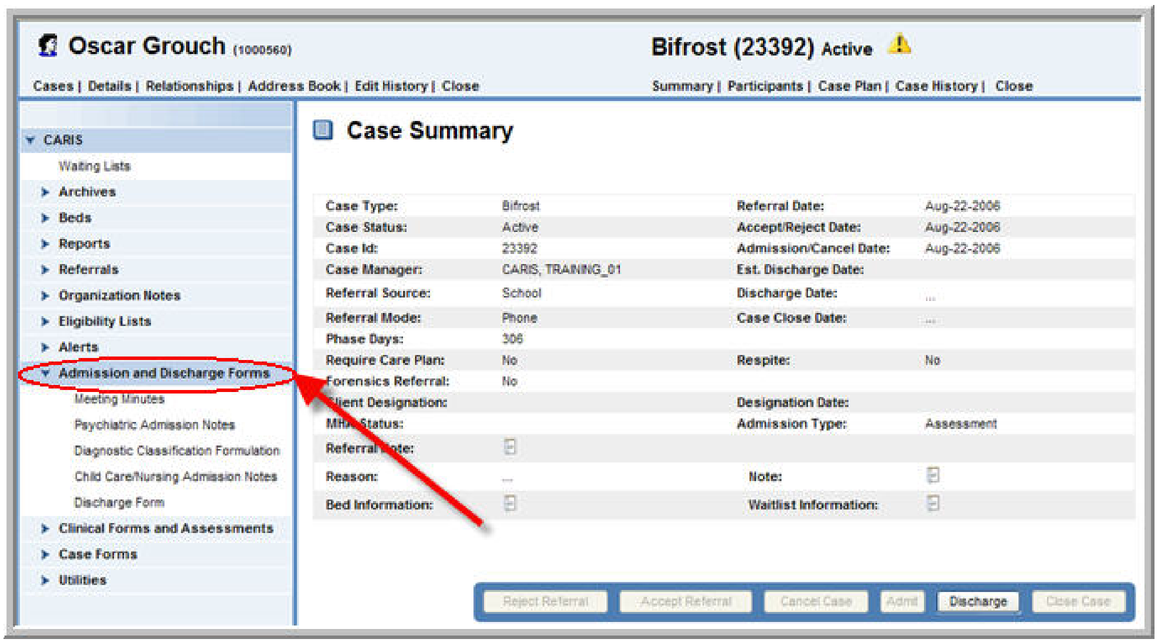
Module 6: Admission and Discharge Forms

At the end of this module, participants will be able to:

3. Access Admission and Discharge Forms
4. Complete a client form.

CARIS has a number of admission and discharge forms that are used with cases. These forms can be found from the Navigation Tree under <u>Admission and Discharge Forms</u>. The types of forms that will be available to you will depend on the status of the case.



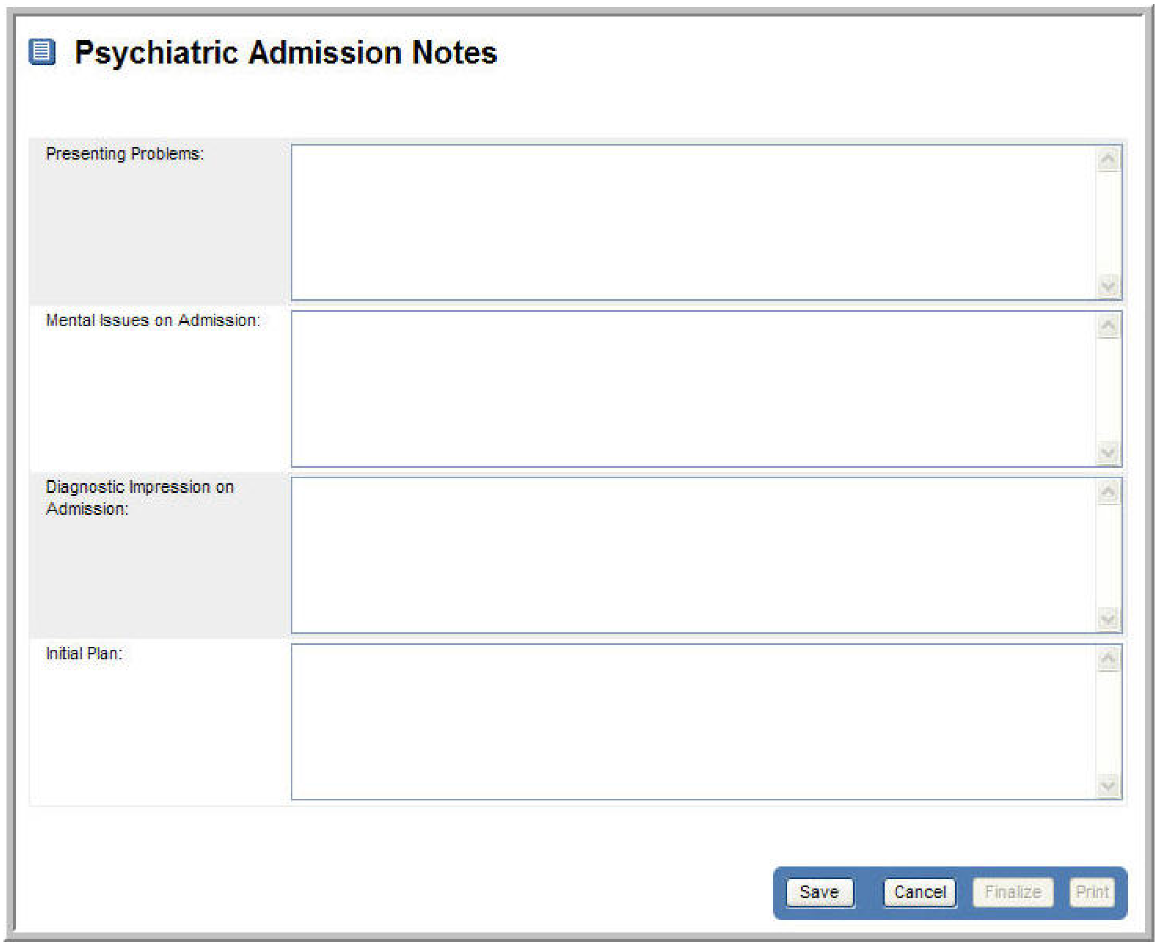
Meeting Minutes

Open Admission and Discharge Forms in the Navigation Tree and then Meeting Minutes. Enter text in the “Goal(s)”, “Long Term Plan(s)”, and “Other Issues” fields.

Once the form has been completed, click **Save,** to save a working copy, **Save and Print**, to save and print a working copy, or **Finalize and Print**, to complete the minutes and print for the paper file.

Psychiatric Admission Notes

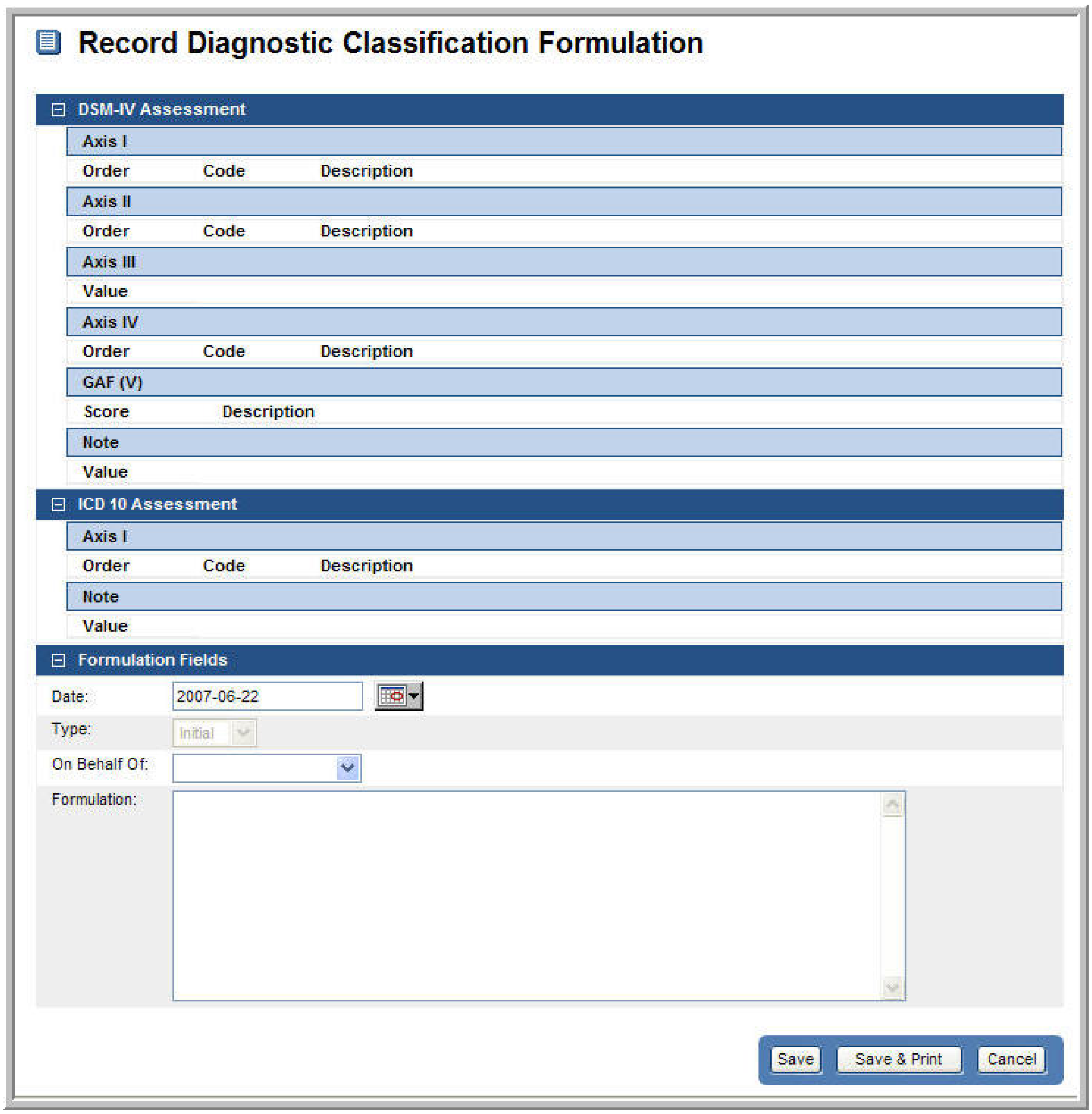
1. Open Admission and Discharge Forms in the Navigation Tree and then Psychiatric Admission Notes.
2. Enter text in the "Presenting Problems", "Mental Issues on Admission", "Diagnostic Impression on Admission", and "Initial Plan" fields.
3. Once the form has been completed, click **Save.**



Saved forms can be finalized at a later date and printed using the Finalize and Print buttons.

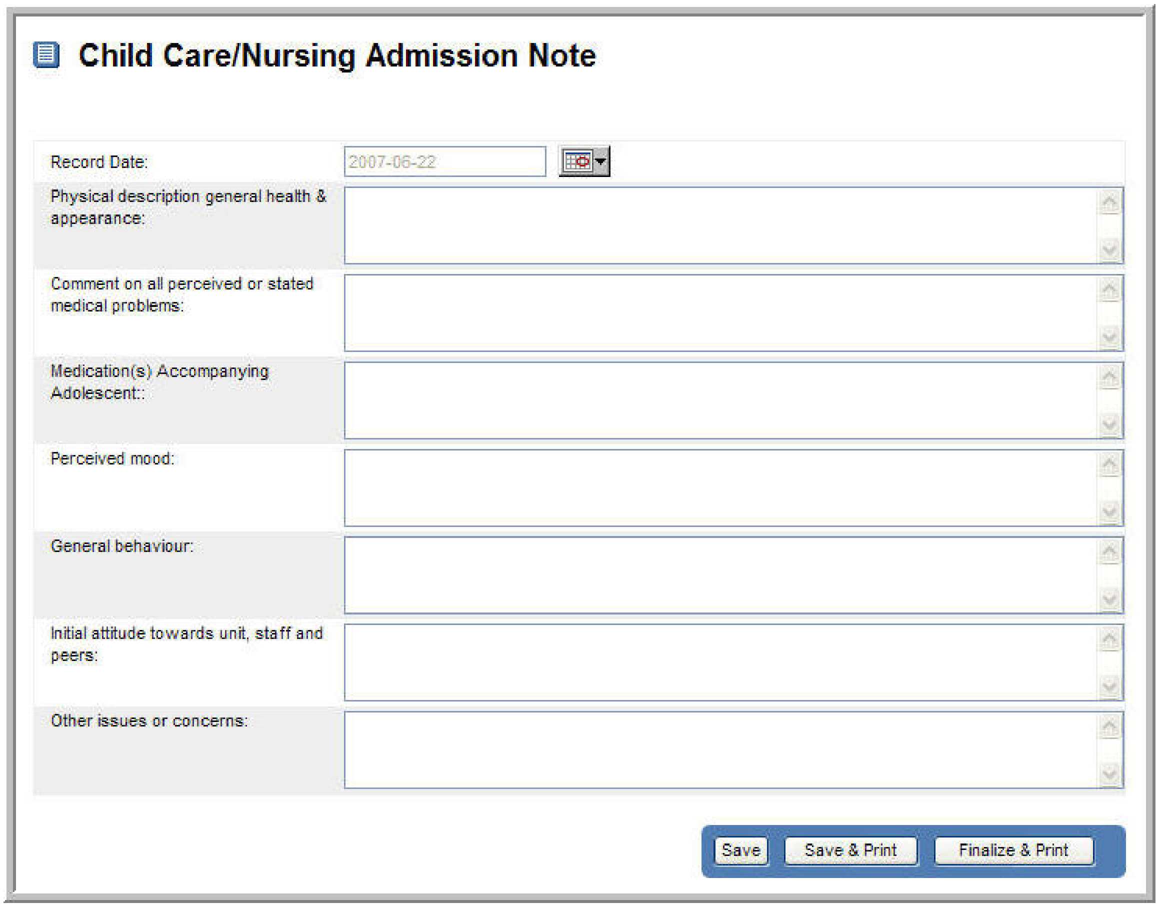
Diagnostic Classification Formulation

1. Open Admission and Discharge Forms in the Navigation Tree and then Diagnostic Classification Formulation. (Note: information for this form is drawn from the DSM-IV or and ICD-10 classification worksheet which must be completed first.)
2. Click **New Formulation**.
3. Complete the fields as required.
4. Click **Save** or **Save & Print**.



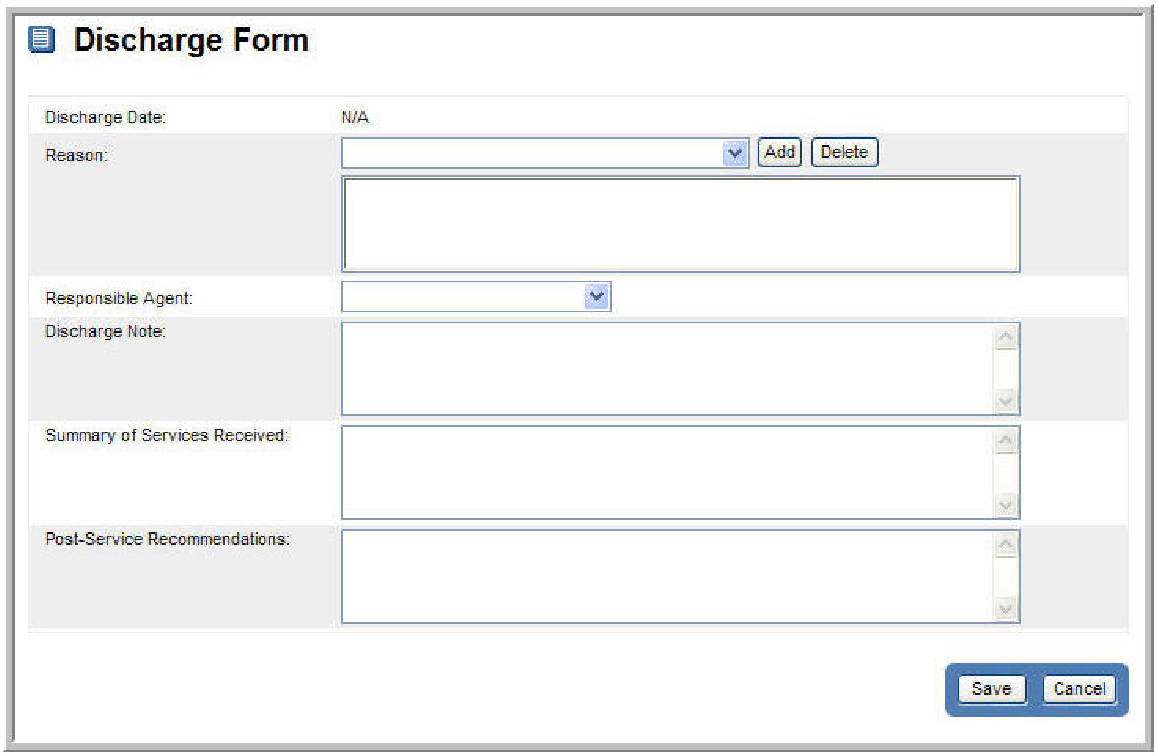
Child Care/Nursing Admission Note

1. Open Admission and Discharge Forms in the Navigation Tree and then Child Care/Nursing Admission Note.
2. Enter text in each of the text fields.
3. Once the form has been completed, click **Save,** to save a working copy, **Save and Print**, to save and print a working copy, or **Finalize and Print**, to complete the admission note and print for the paper file.
4. Notice the options for Save will change after the initial note is saved.



Discharge Form

1. Open Admission and Discharge Forms in the Navigation Tree and then Discharge Form.
2. Select a "Discharge Reason" and a "Responsible Agent" from the list in the drop-down box and click **Add**. Enter text in the "Discharge Note"." Summary of Services Received", and "Post Service Recommendation" fields.
3. Once the form has been completed, click **Save.**



Exercise 1

1. Add a form of your choice to the file of one of your active cases.

Learning Checkpoint

1. Name three types of forms that could be used with a client during the admission/discharge phases of client service.

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2. Which forms must be finalized before a client can be discharged?

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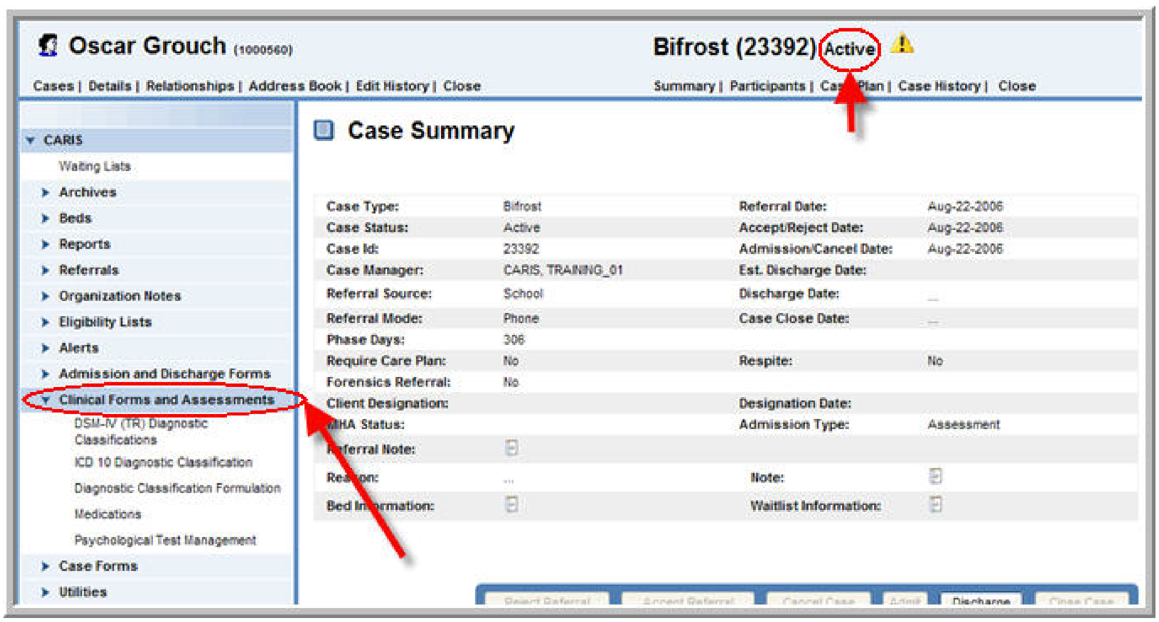
Module 7: Clinical Forms and Assessments

At the end of this module, participants will be able to:

1. Access clinical forms.
2. Complete a clinical form.

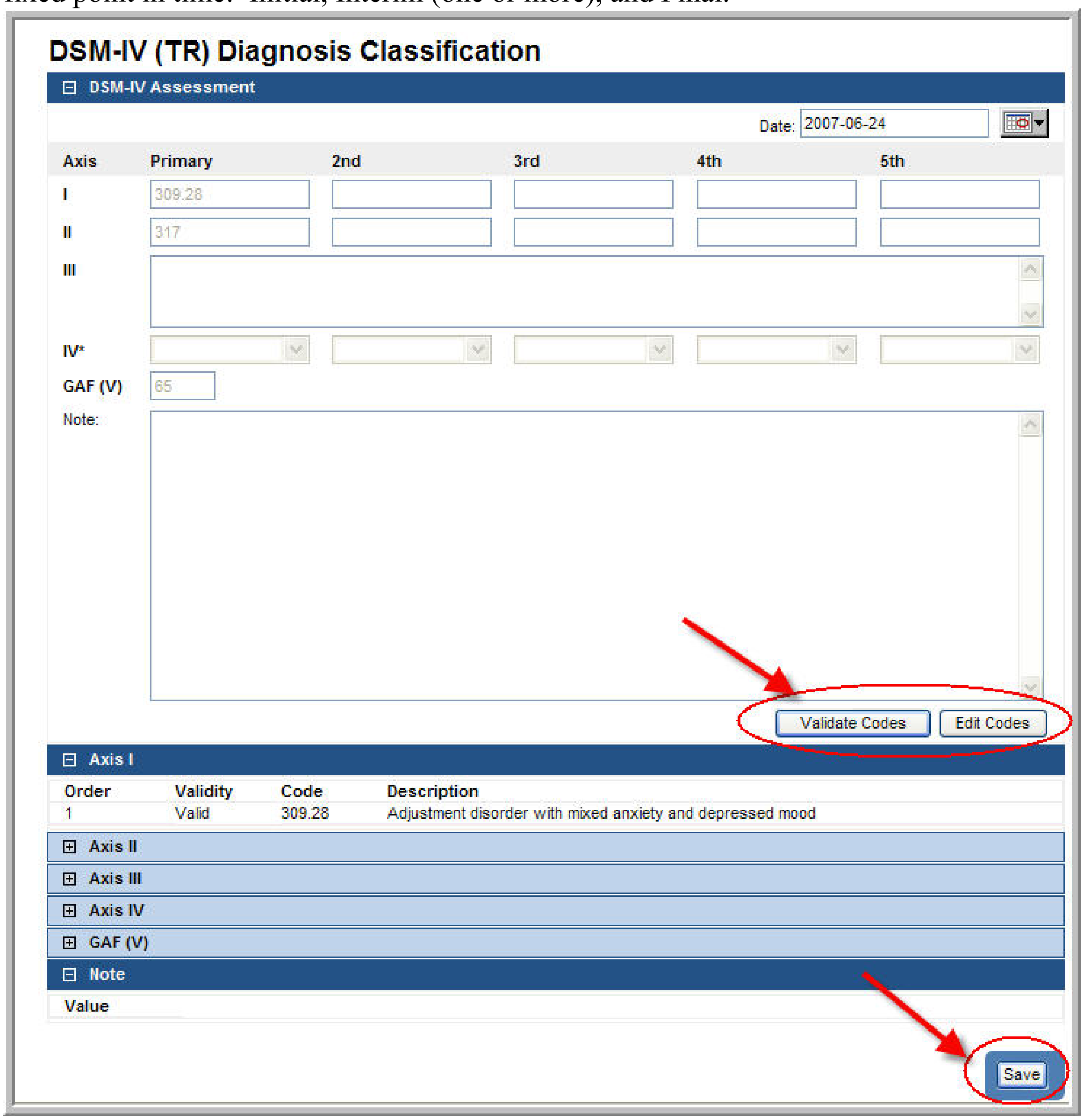
CARIS has a number of clinical forms that are used with cases. These forms can be found from the Navigation Tree under Clinical Forms and Assessments. The types of forms that will be available to you will depend on the status of the case.

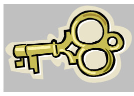


DSM-IV (TR) Diagnosis Classification Worksheet

1. Open Clinical Notes and Assessments in the Navigation Tree and then select the DSM-IV (TR) Worksheet.
2. Complete the fields as required. Note that you will need to refer to a DSM manual to determine the codes for the classification.
3. **Date, Primary Axis I and II, along with the GAF are mandatory fields**.
4. Click **Validate Codes** to ensure that you have entered them correctly.
5. Click **Save.**

The information you entered on the worksheet is now available for you to create a DSM-IV (TR) Formulation. This gives you a mechanism for identifying a classification at a fixed point in time: Initial, Interim (one or more), and Final.



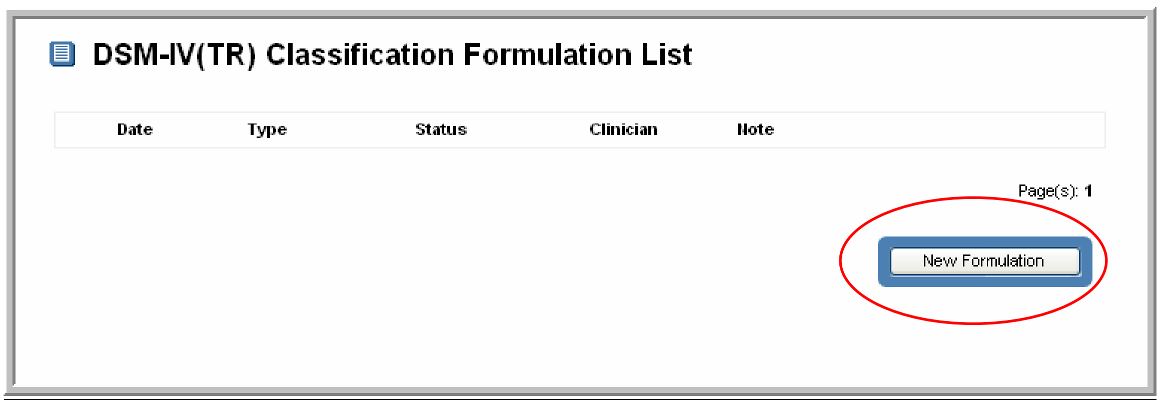
As a worksheet, the form is reusable. To update or re-use the form, click **Edit Codes**, type over the original entries, and click **Validate Codes**. For Axis IV, hovering over the * identifies the codes available in the drop down box.

Initial Classification Formulation

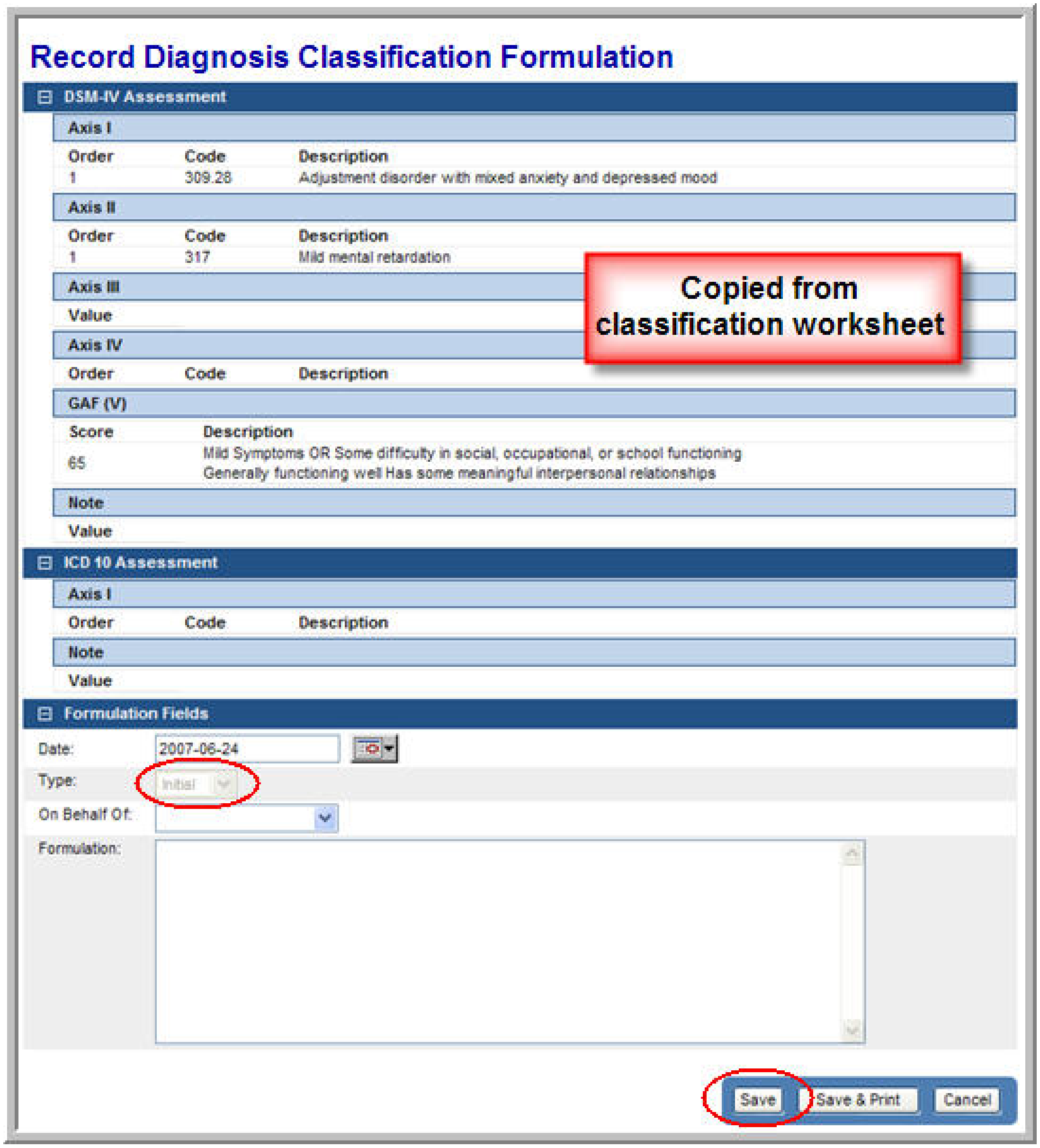
As described above, the information for a formulation is collected with the DSM-IV (TR) worksheet. After you have done that, you select the DSM-IV (TR) Classification Formulation, found in the Navigation Tree under Clinical Notes and Assessments. The values from the worksheet are automatically copied into the Classification Formulation.

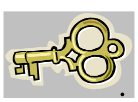
This is what you do:

1. Open Clinical Notes and Assessments in the Navigation Tree and then DSM-IV (TR) Classification Formulation.
2. Click **New Formulation**.



3. The default status is "Initial". The formulation copies the information from the DSM-IV (TR) Worksheet into this form. In order to save the formulation, you will need to enter a note in the Formulation text box explaining the rationale for the classification. The "on behalf of" function is available if you are entering information on behalf of a psychiatrist or another clinician.
4. Click **Save**. The initial formulation can now be printed or displayed on reports like the Case Face Sheet.



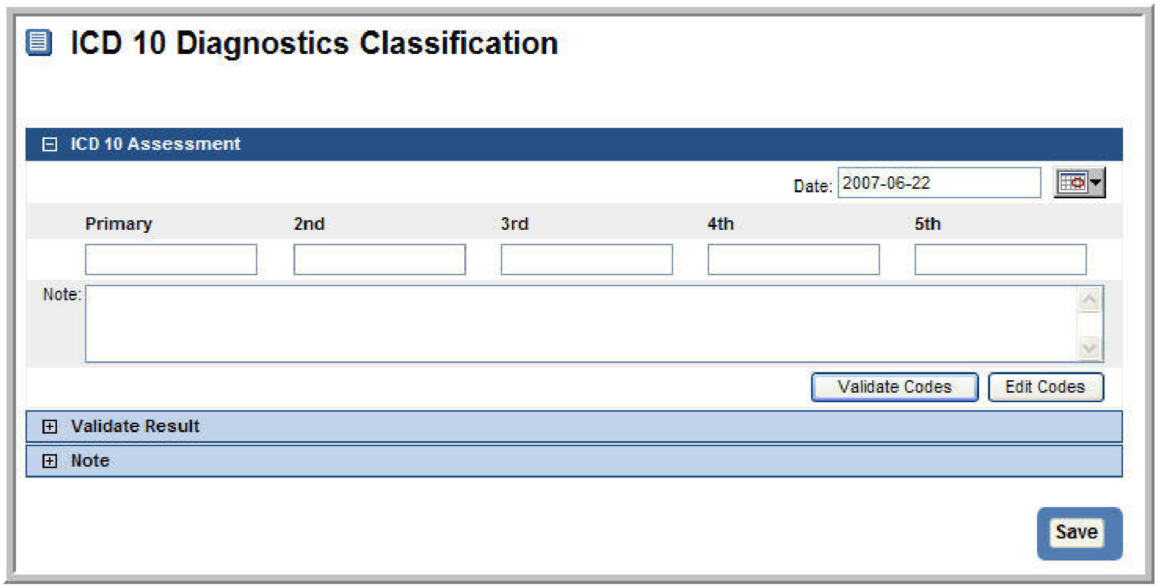


When the Classification Formulation is first created, the Type is “Initial”. Changes to the DSM-IV Classification that are captured in subsequent formulations have a status of “Interim”. The status for the last Formulation you do is “Final”. This is the formulation you enter when you are ready to discharge a case, usually after you have completed your termination report. Formulations can also be deleted. Deleted formulations have a line drawn through them. The Classification Formulation is the permanent record of DSM classifications at any specific time during the case.

Completed forms can be viewed in Case Context by opening Case History.

ICD 10 Diagnostic Classification

1. Open Clinical Forms and Assessments in the Navigation Tree and then ICD 10.
2. Complete the fields as required.
3. Click **Save** to save a working copy, **Finalize** to complete the form. (Note: there is only one ICD 10 form per case.)



Notes entered here are saved under **Note**.

To update the form, click **Edit Codes**, type over the original entries, and click **Validate Codes**.

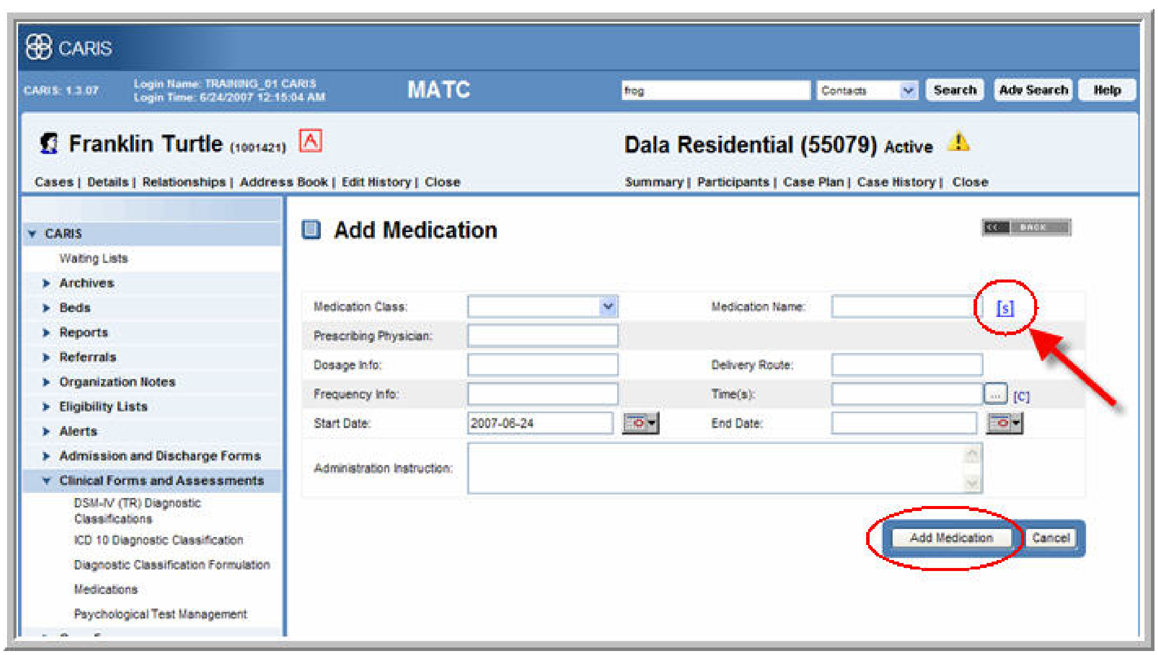
Medications

1. Open Clinical Forms and Assessments in the Navigation Tree and then Medications.

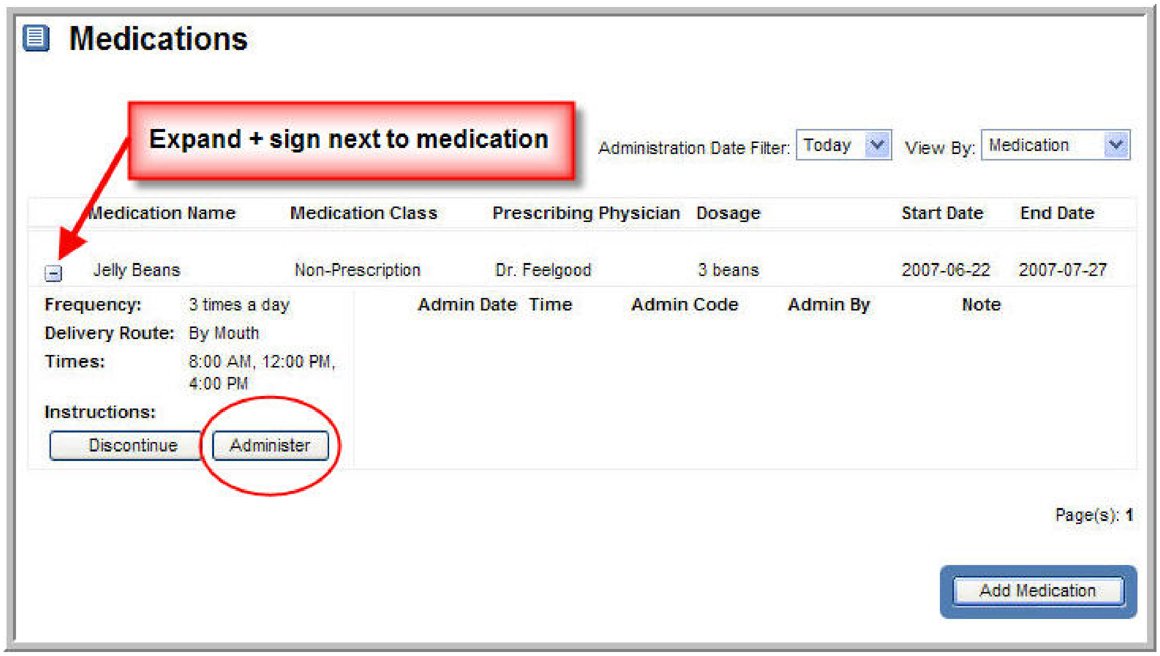
2. Click **Add Medication.**

3. Complete the fields as required. Clicking the [s] button will allow you to search by selecting the name of the medication, or you can simply type in the name.

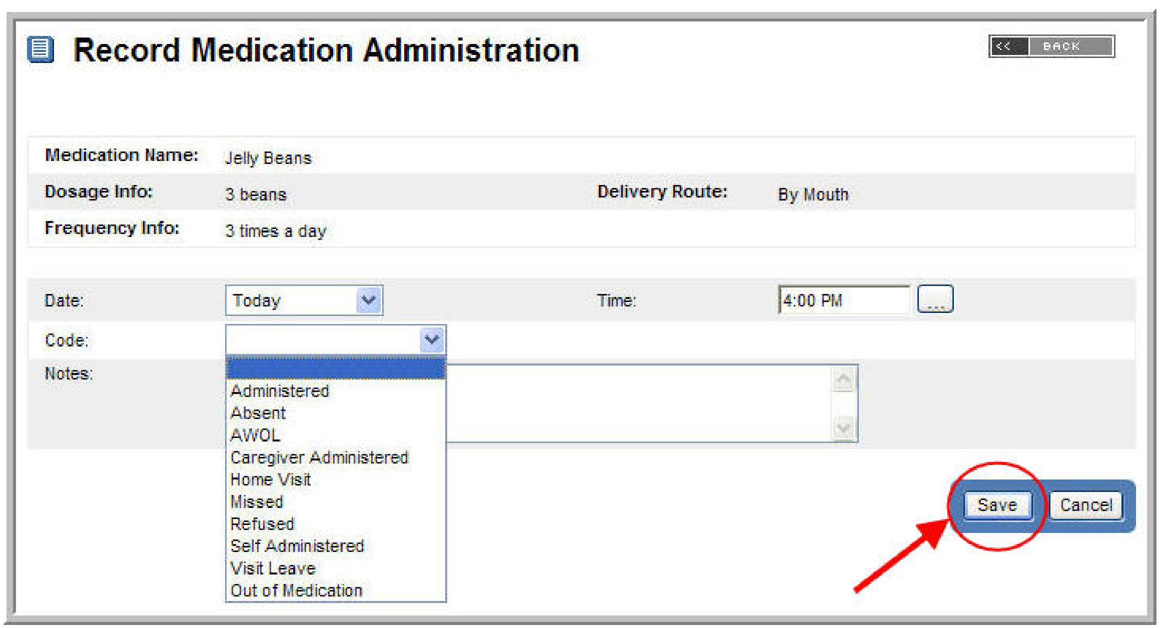
4. Click **Add Medication**.



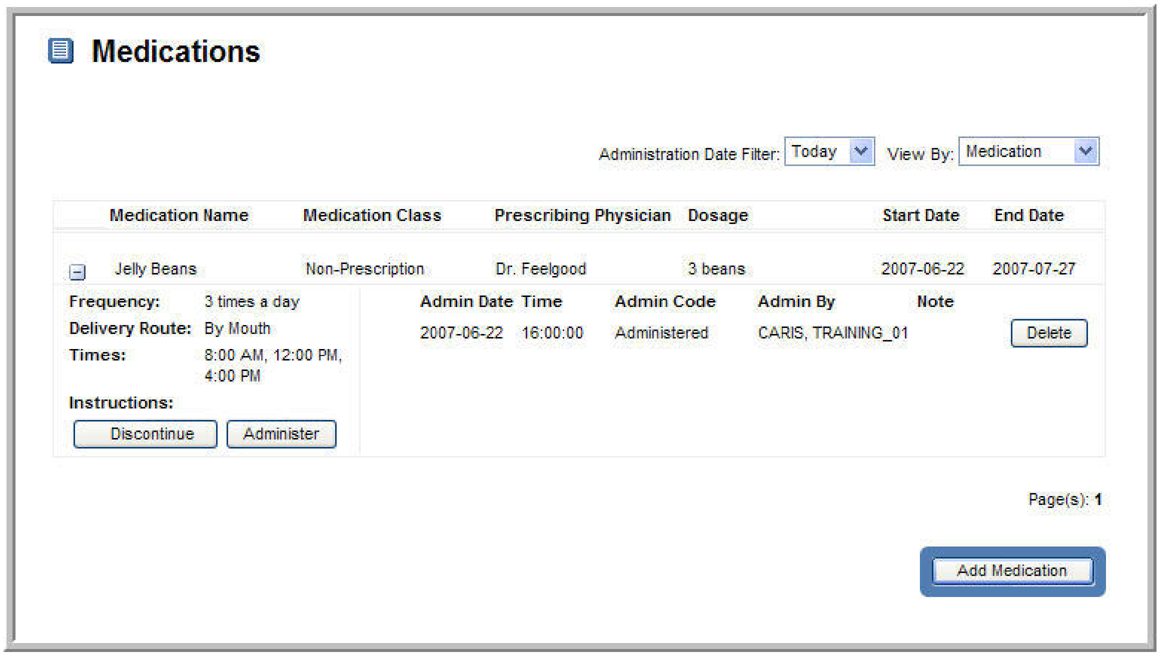
To administer a medication, click the + sign next to the name of the medication.

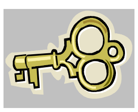


1. Click **Administer**
2. Select "Code" from the list in the drop down box and enter text, if appropriate, in the "Notes" field.
3. Click **Save.**



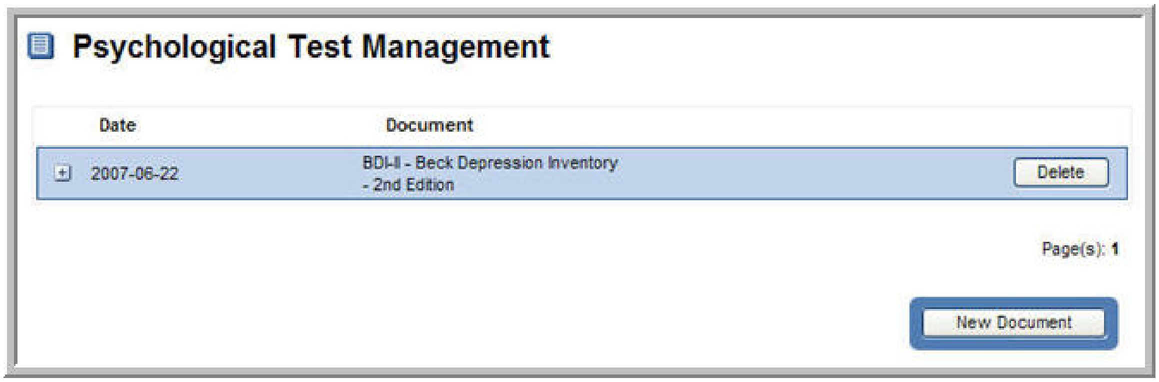
Note the administered medication activity has been added to the "Medications" page.

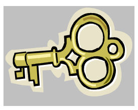




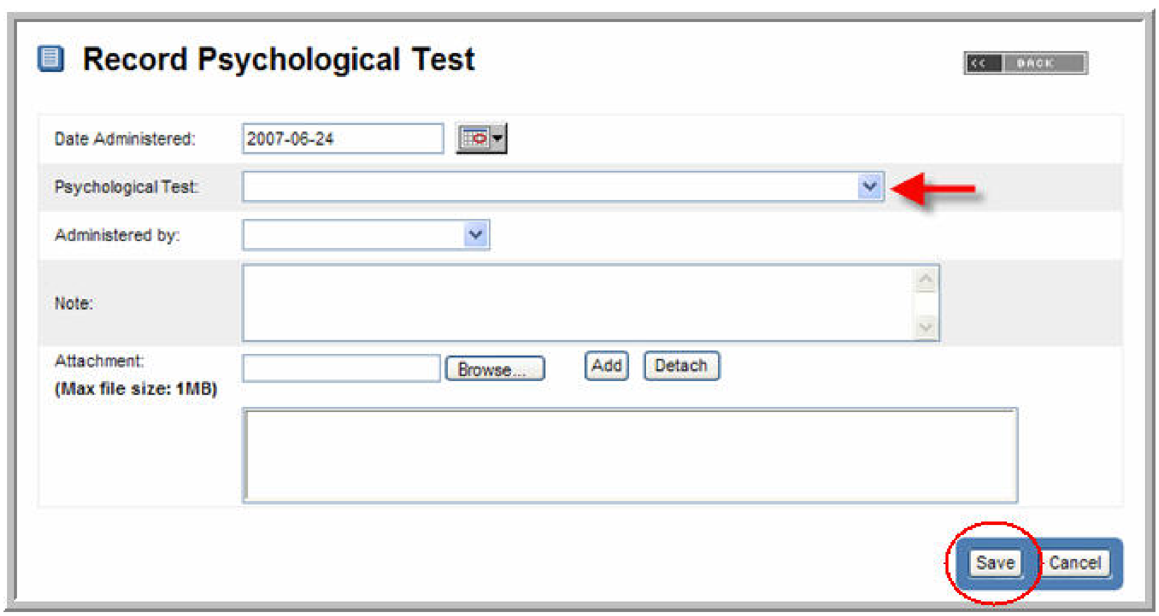
When a medication is discontinued a line is drawn through the record.

Psychological Test Management



 Screens with a New Document button will build a list of the documents recorded in CARIS. It is sometimes easier to find these documents, which can be assessed from the Navigation Tree than through Case History.

1. Open Clinical Forms and Assessments in the Navigation Tree and then Psychological Test Management.
2. Complete the fields as required.
3. Click **Save**.



Exercise 1

1. Add a clinical form to the file of one of your cases.

Learning Checkpoint

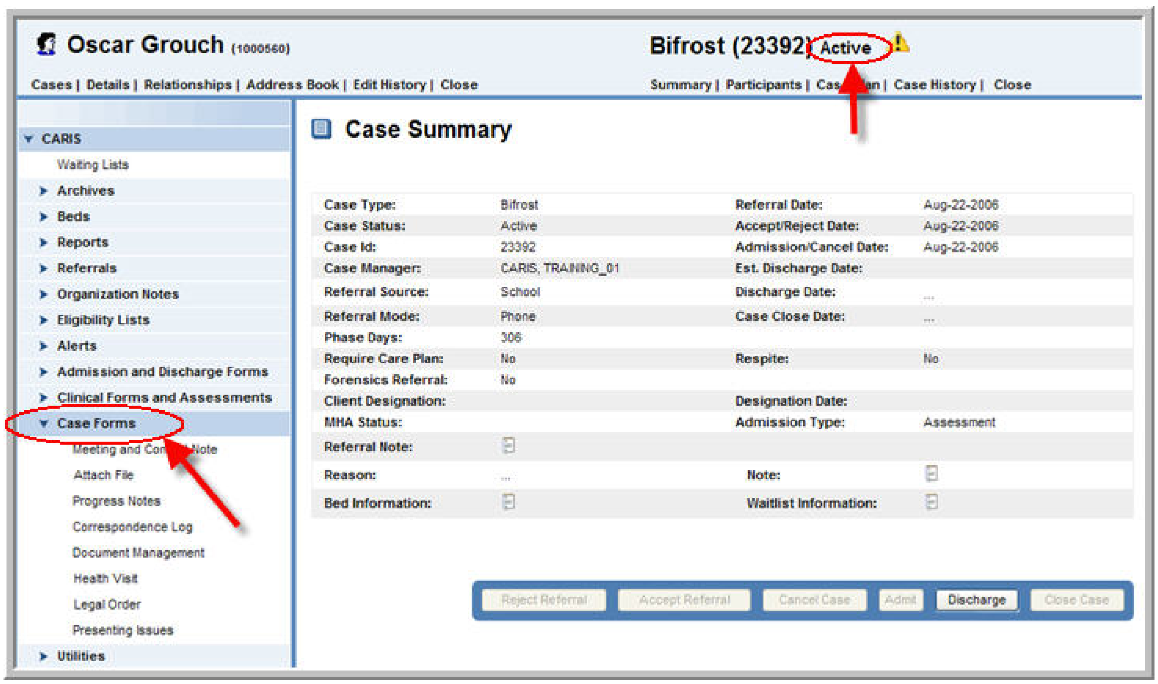
2. Name three types of clinical forms that could be used with a client:

Module 8: Case Forms

At the end of this module, participants will be able to:

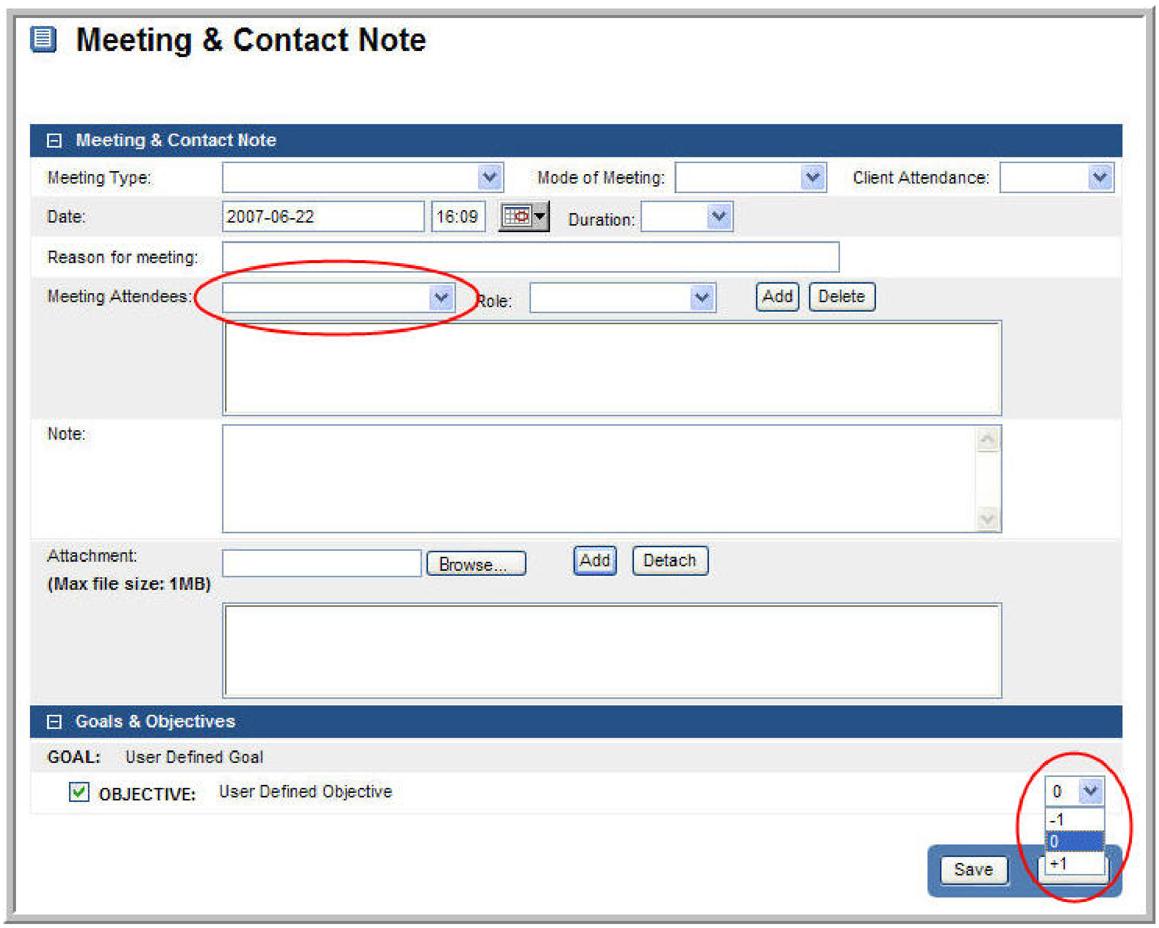
1. Access case forms.
2. Complete a case form.

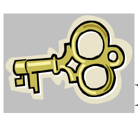
CARIS has a number of forms that are used with cases. These forms can be found from the Navigation Tree under Case Forms.   The types of forms that will be available to you will depend on the status of the case. The accompanying table lists case forms by phase of client service.



Meeting & Contact Note

1. Open Case Forms in the Navigation Tree and then Meeting and Contact Note.
2. Complete the fields as required.
3. Meeting Attendees (other members of the case) can be selected from the drop down list.
4. Progress on Objectives is recorded as +1 , 0, or -1. (This activity is also saved in the case plan area for ease of reporting/referencing.)
5. Click **Save.**

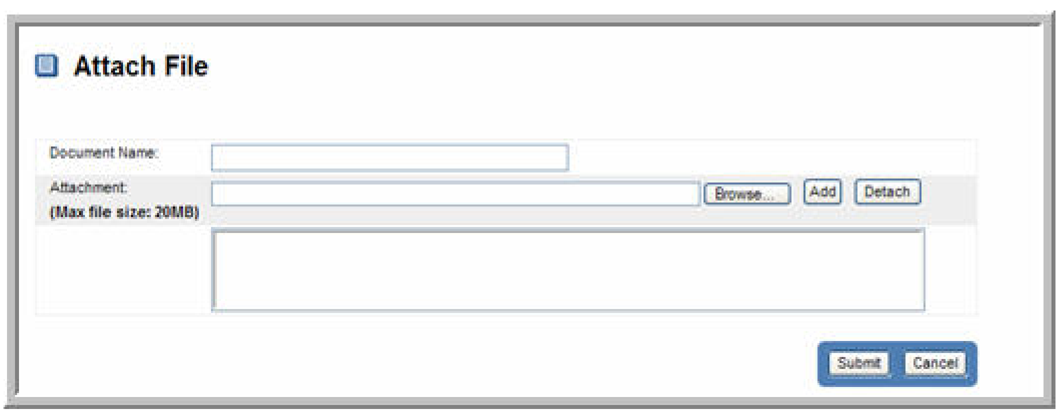


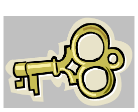
If you attach a file to the Meeting & Contact Note, it cannot be removed once the form has been saved. The original document also still resides with the sender.

Meeting & Contact Notes are saved in Case History by Meeting Type. This is the list of types available.

Attach File

1. Open Case Forms in the Navigation Tree and then Attach File.
2. To attach a file, use the **Browse** (to locate the file on your machine), **Add** (to attach the file), and **Detach** (to remove the file) buttons.
3. Click **Submit.**



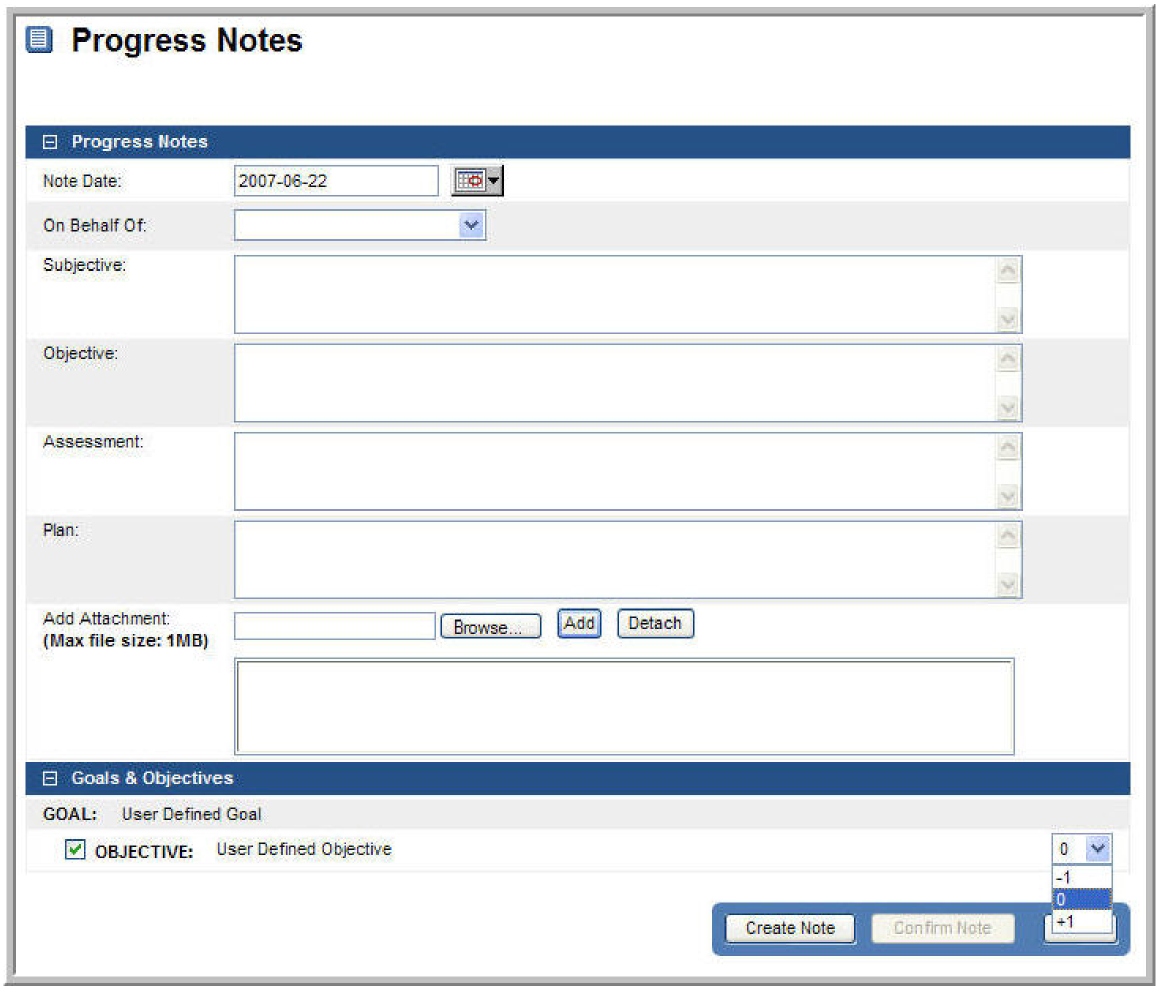


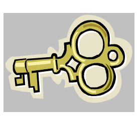
The attach file function is not available during the referral phase of a case. If you need to attach a file during this phase, use the Documents Management form.

Progress Note

Use a Progress Note to record Session Notes.

1. Open Case Forms in the Navigation Tree and then Progress Notes.
2. Complete the fields as required.
3. Click **Create Note.**



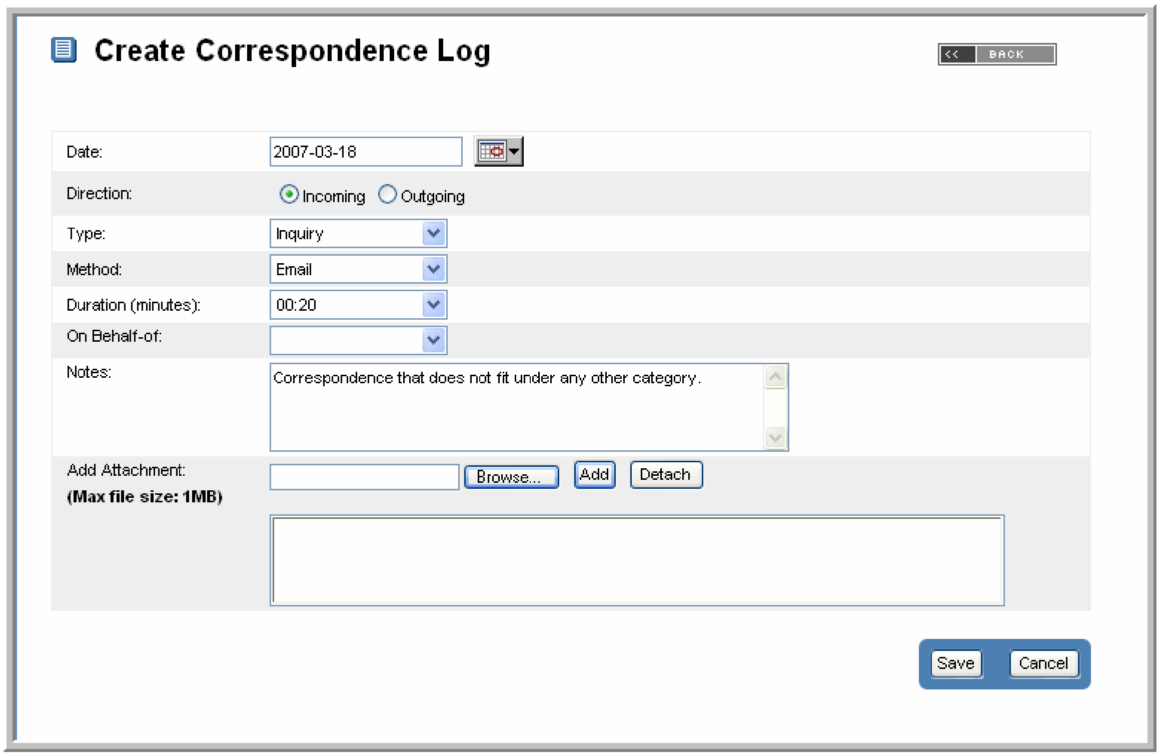
 A **Progress Notes** form must have an objective statement, an assessment, and a plan. As with the **Meeting & Contact Note** form, there is an option to record progress on an objective with a +1, 0, -1. “On Behalf Of” is not a mandatory field.

Progress notes can be edited after **Save Changes**; however, they can NOT be edited after **Confirm Note**. Be aware that ALL edits are tracked in the Case History.

Correspondence Log

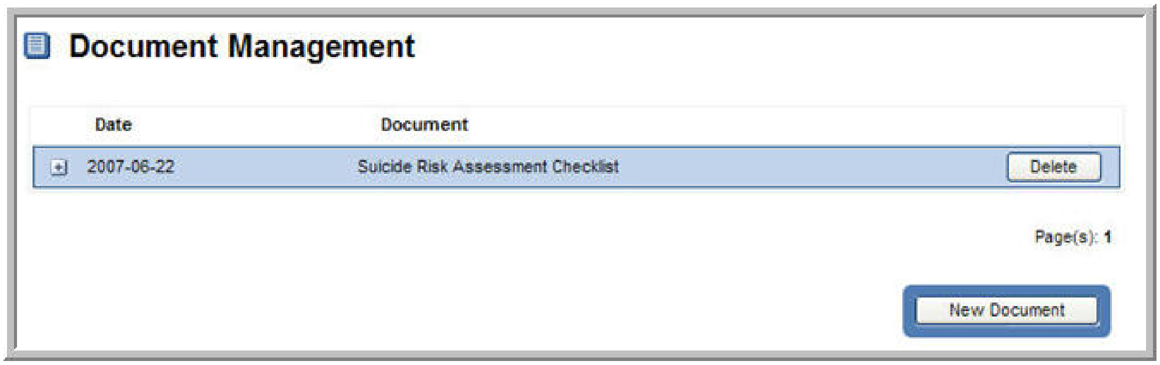
The Correspondence Log is used to enter correspondence information that does not belong under any other type of case note or assessment.

1. Open Case Forms in the Navigation Tree and then Correspondence Log.
2. Complete the fields as required.
3. Click **Save.**

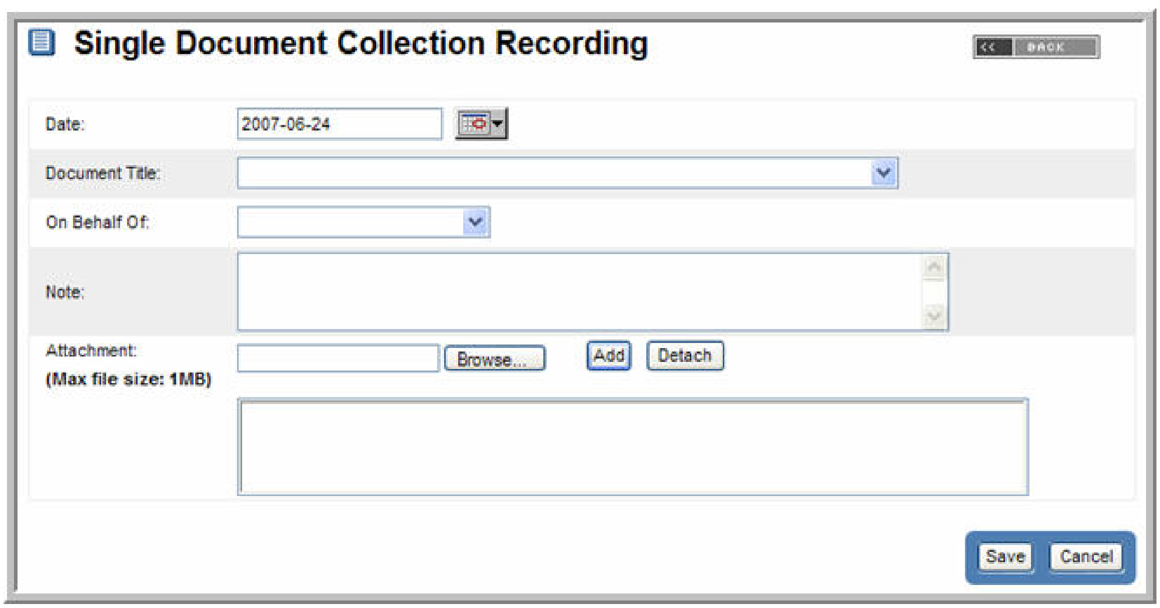


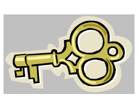
Document Management

1. Open Case Forms in the Navigation Tree and then Document Management.
2. Click **New Document**.



3. Complete the fields as required.
4. Click **Save**.



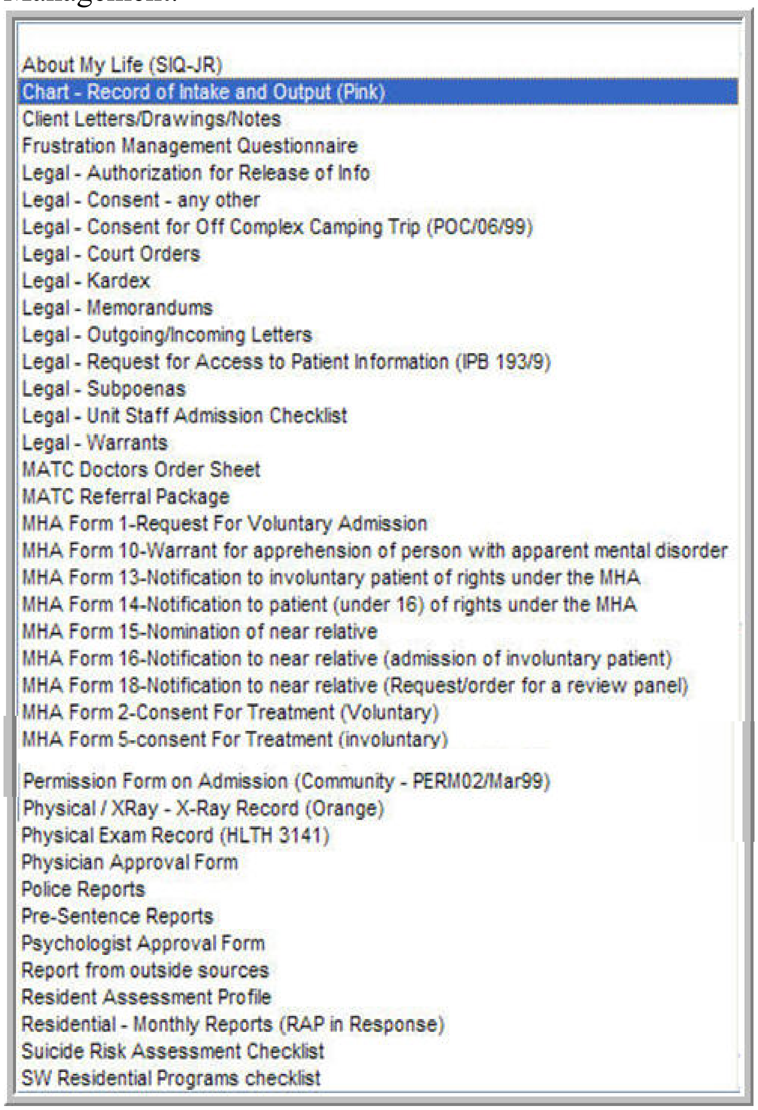


Forms created using the Document Management are stored in Case History by the type of form.

Document Titles

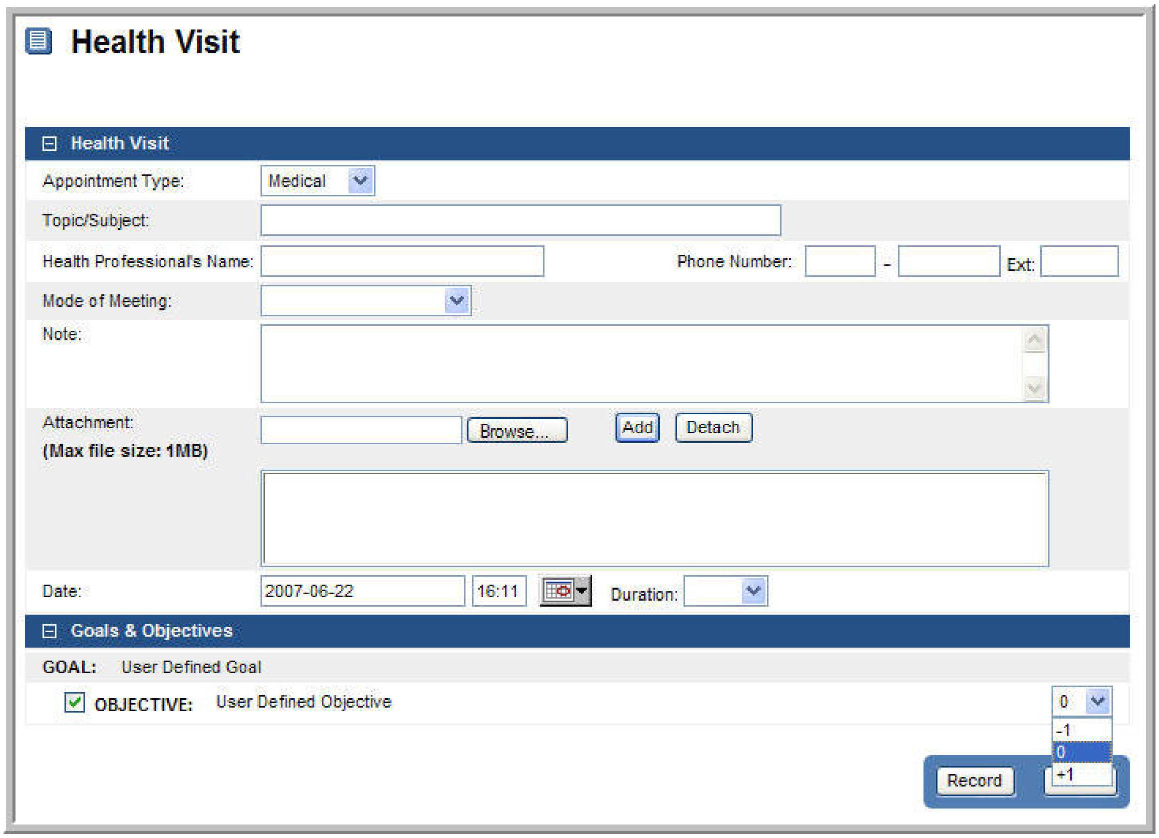
There are many different possible documents that can be attached in Documents Management. These documents will form a list that can be accessed from the Navigation Tree.

This is the list of documents that can be attached to the CARIS file using Document Management.



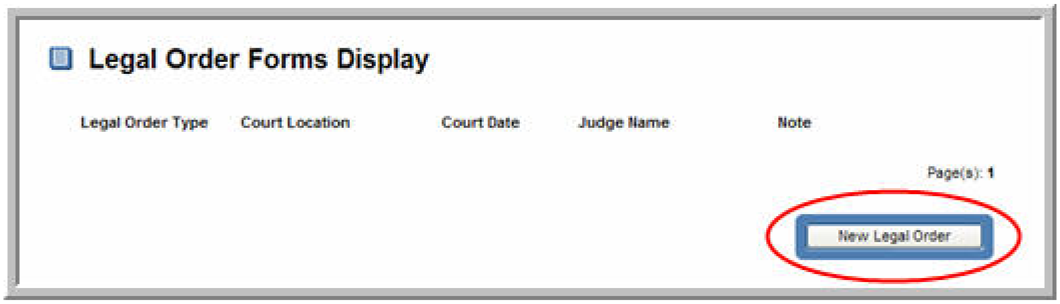
Health Visit

1. Open Case Forms in the Navigation Tree and then Health Visit.
2. Complete the fields as required.
3. Click **Record**.



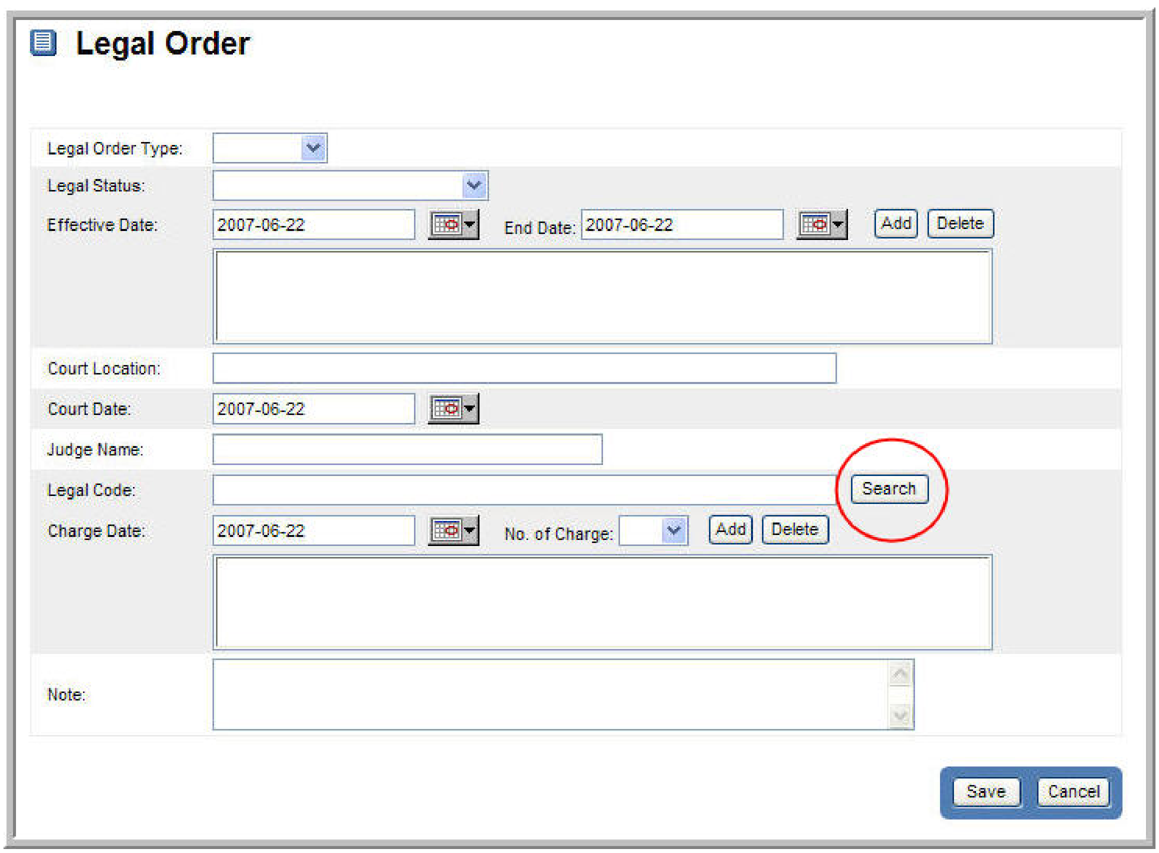
Legal Order

1. Open Case Forms in the Navigation Tree and then Legal Order Forms Display.
2. Click **New Legal Order**.

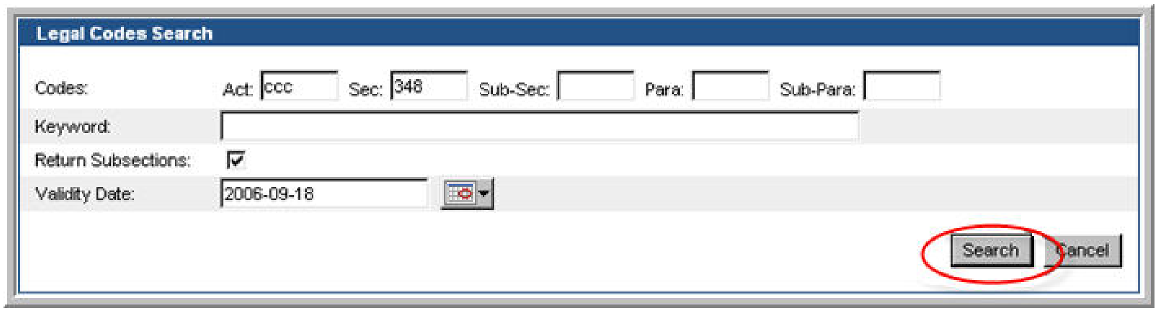


3. Mark the form as required.

4. Click **Record Observation.**

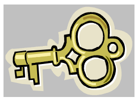


Use the Legal Code search button to search for your exact legal code:



Choose the appropriate sub-section, paragraph, etc., from the choices which are presented in the search results.

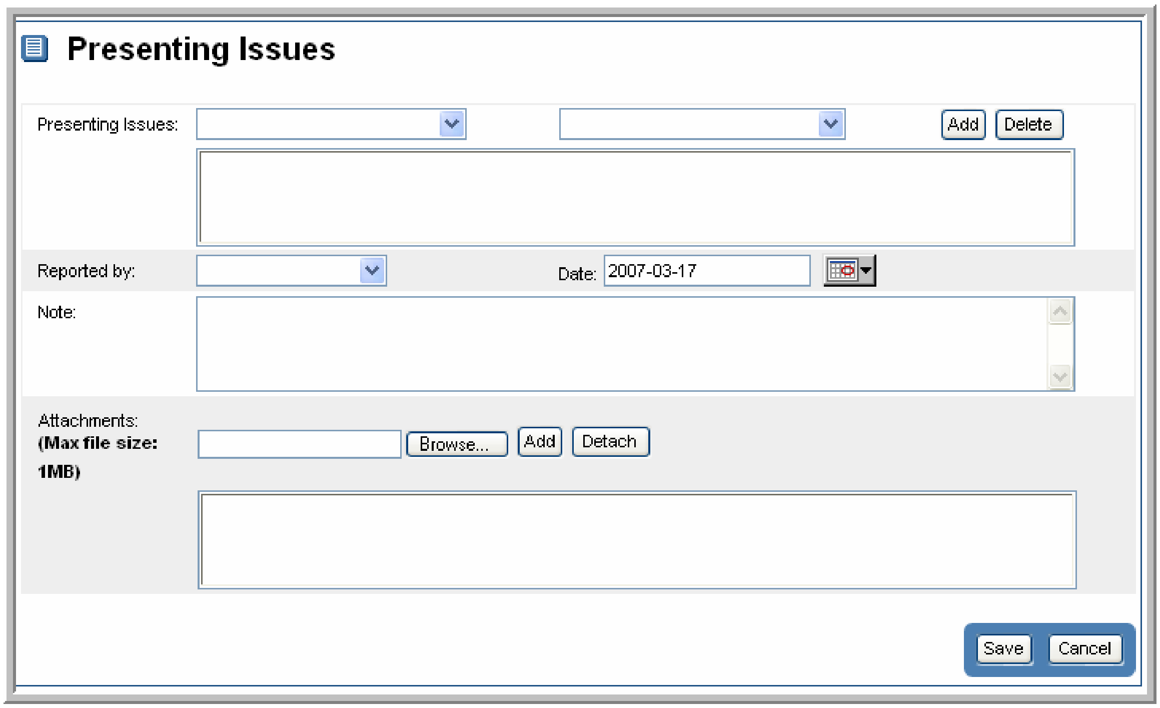
Choose the "No. of Charges" and click **Add**. Repeat this process until you have recorded all of the charges laid.



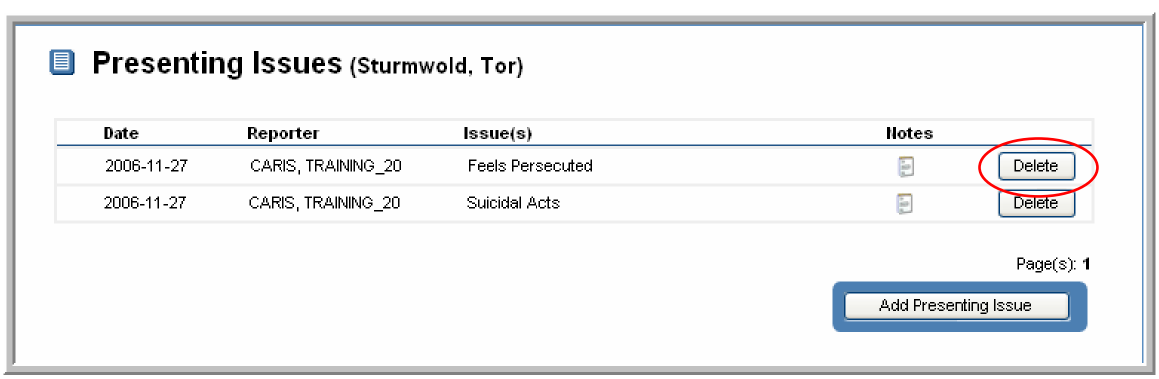
Legal Orders can be found in Case History, but they cannot be updated there. You must select the form from the CARIS Navigation Tree.

Presenting Issues

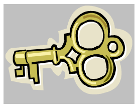
1. Open Case Forms in the Navigation Tree and then Presenting Issues.
2. Click **Presenting Issues**.
3. Complete the form as required.
4. Click **Save.**



The Presenting Issues Form cannot be edited once it has been saved. If you need to add presenting issues later or change the ones you have already entered, you will need to add a new Presenting Issues Form and explain the reason for the change in the “note” field. Forms entered in error can be deleted by clicking the **Delete** button.

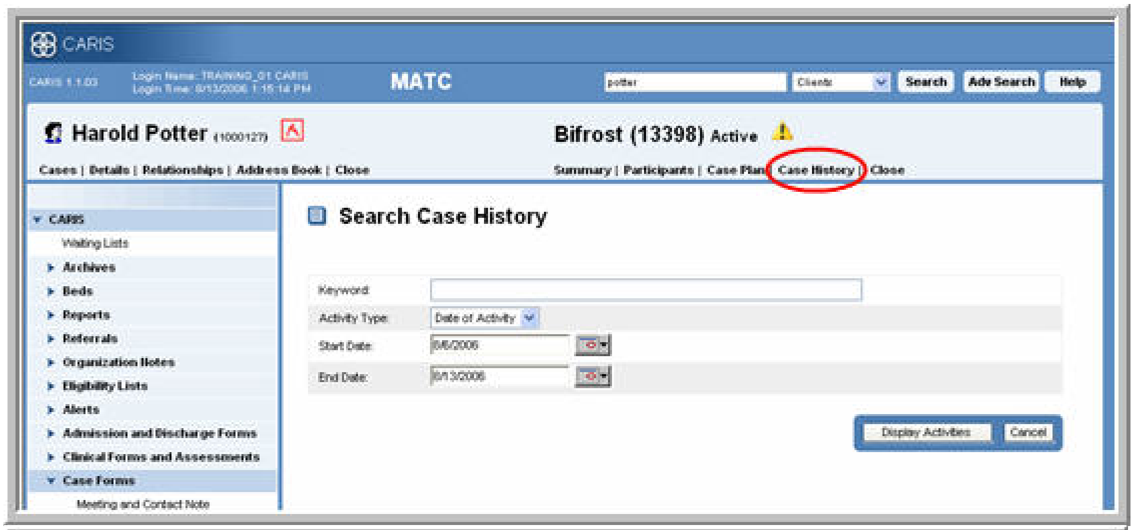


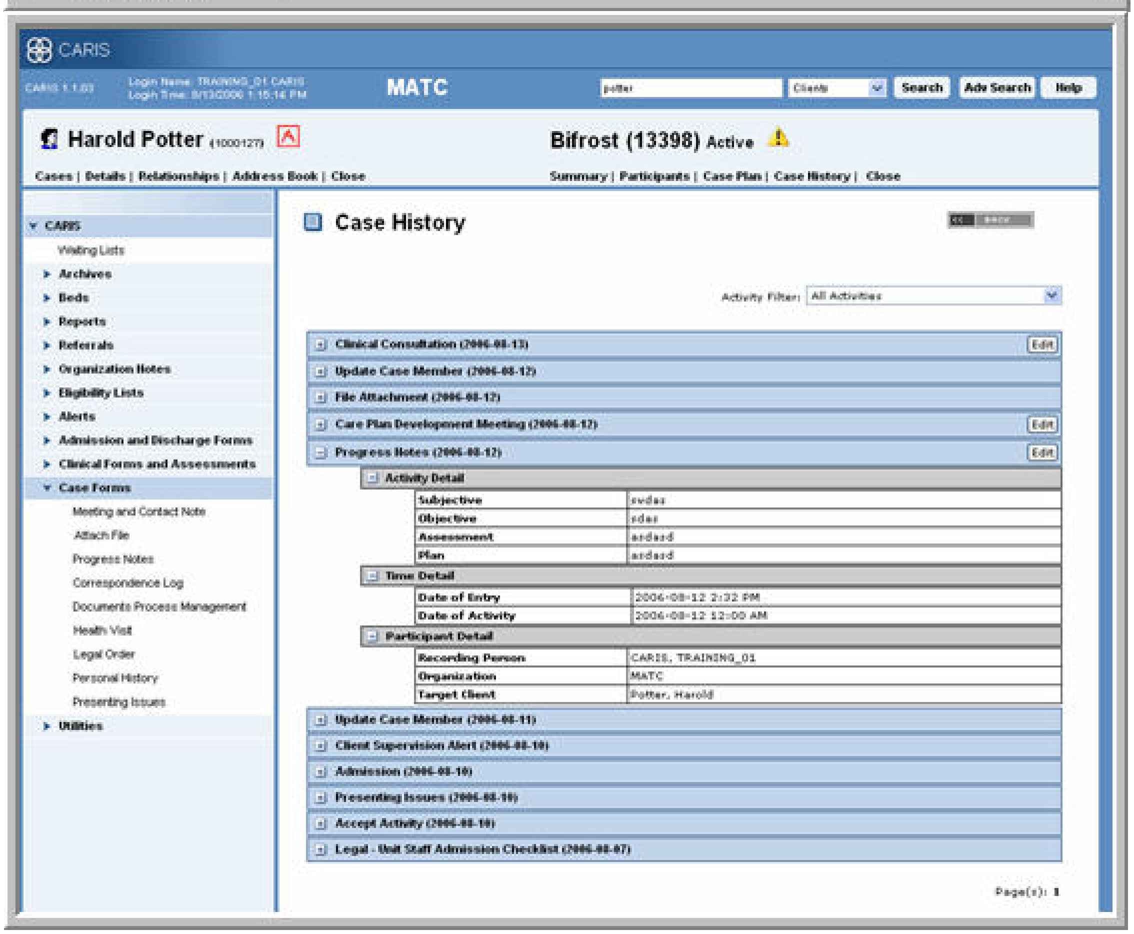
Once these forms have been created, they can be accessed by opening **Case History** and then clicking **Display Activities**.



Case forms can be viewed in Case context by clicking on Case History and then **Display Activities**.

Forms that can be edited from Case History have an **Edit** button displayed. Other forms that can be edited are accessed from the CARIS Navigation tree.





Exercise 1

1. Add a progress note to the file of one of your cases.

Learning Checkpoint

1. Name three types of case forms that could be used with a client.

____

____

2. Name three types of meetings you might use the Meeting & Contact Note for.

____

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Module 9: Manage Beds

At the end of this module, participants will be able to:

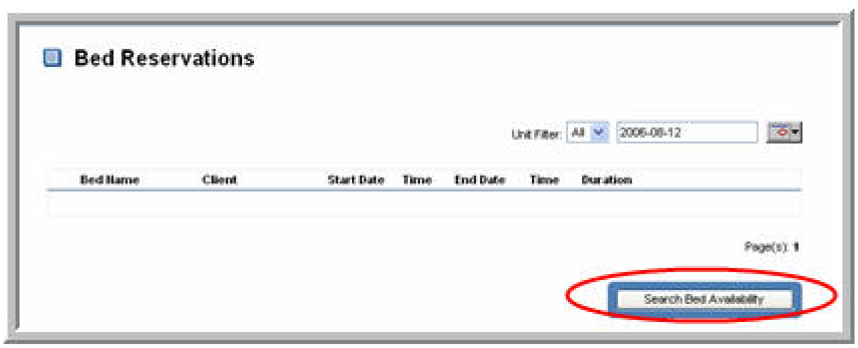
1. Reserve a bed
2. Assign a client to a bed.
3. Relocate a client.

Reserve a Bed

To reserve a bed for a client, you must be in case context. Beds are sometimes assigned to specific programs, so the client may not be eligible for a bed in a unit even if one is available. In that case, you may have to open a new case for the client in a program for which beds are available or edit the Unit via the Bed Administration function (as described above).

To make a bed reservation, start in Case context.

1. Open Beds in the Navigation Tree.
2. Click **Reservations.**
3. Click **Search Bed Availability.**

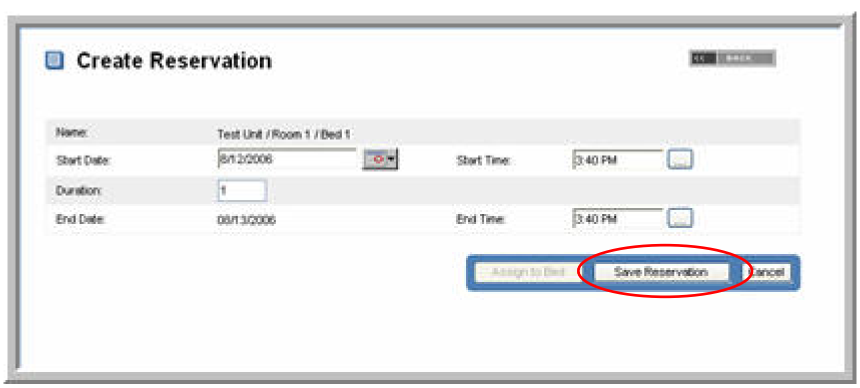


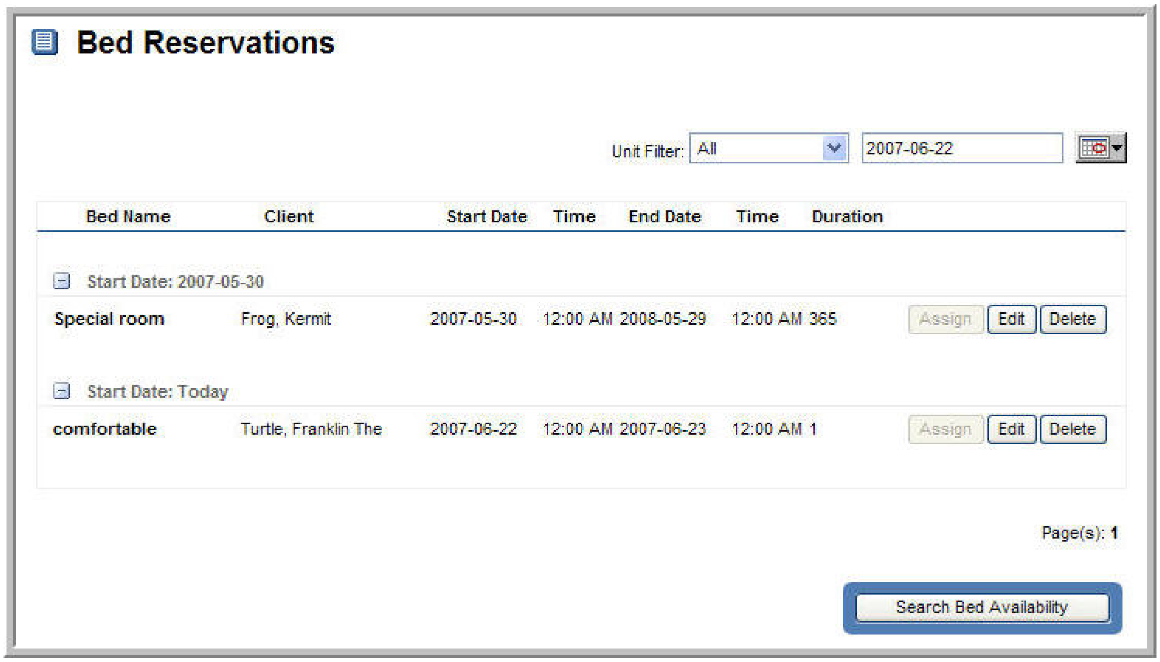
4. Fill in the date you wish to reserve the bed for and the number of days the client will stay.

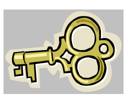
5. Click **Search.**

6. Click **Select** next to the appropriate bed.

7. The "Create Reservation" window will display.
8. Select the "Start Date" and enter the "Duration".
9. Click **Save Reservation.**







A client does not need to be placed on a waiting list for a bed, but if the client requires a bed, a bed reservation must be made unless the client is being admitted today.

The waiting list, however, is the only place where a priority can be assigned to the client's admission.

.

In the pre-admit phase, you would search for a bed, select a bed, and save the reservation.

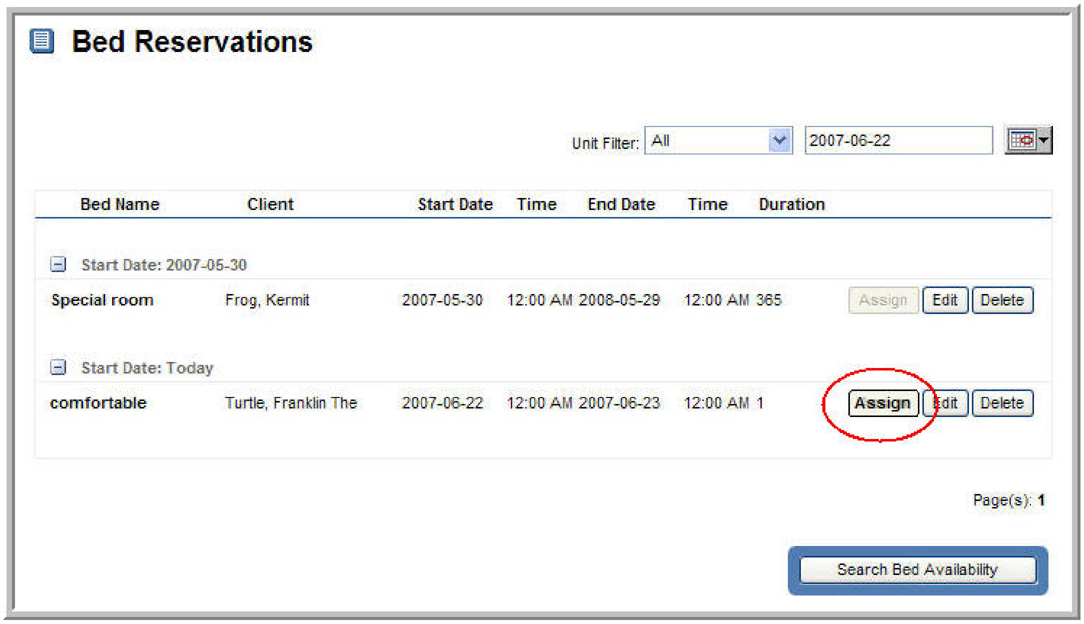
Exercise 1

1. Reserve a bed for a client in the pre-admit phase of care.

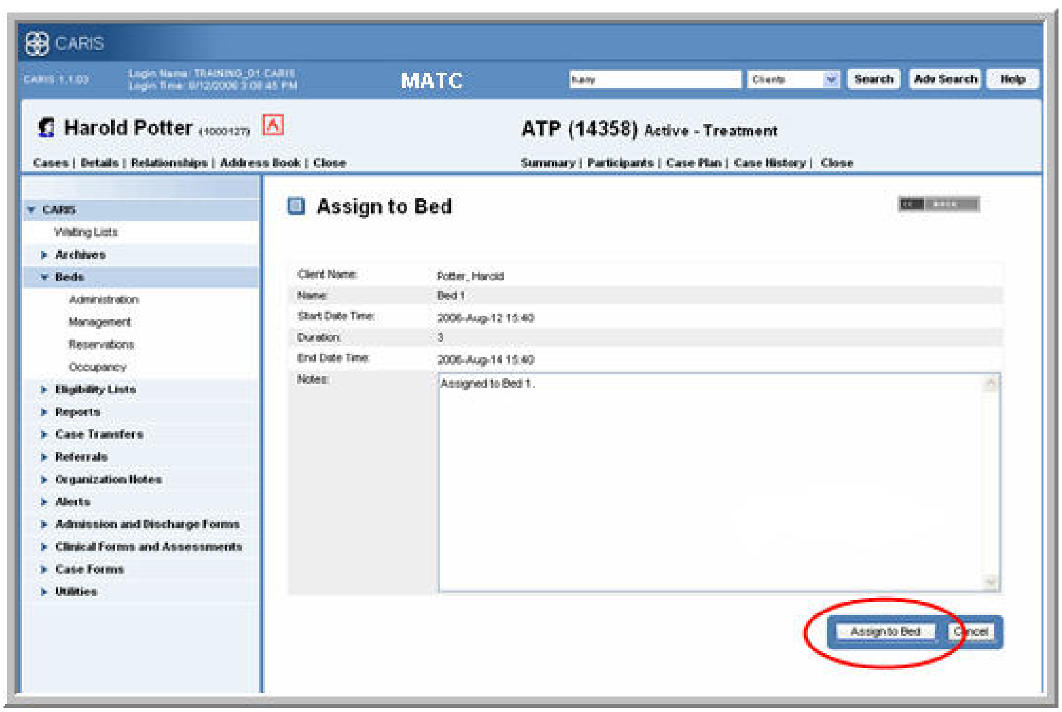
Assign to a Bed

To assign a bed, start in Case context.

1. Open Beds in the Navigation Tree.
2. Click **Reservations.**
3. Click **Assign.**

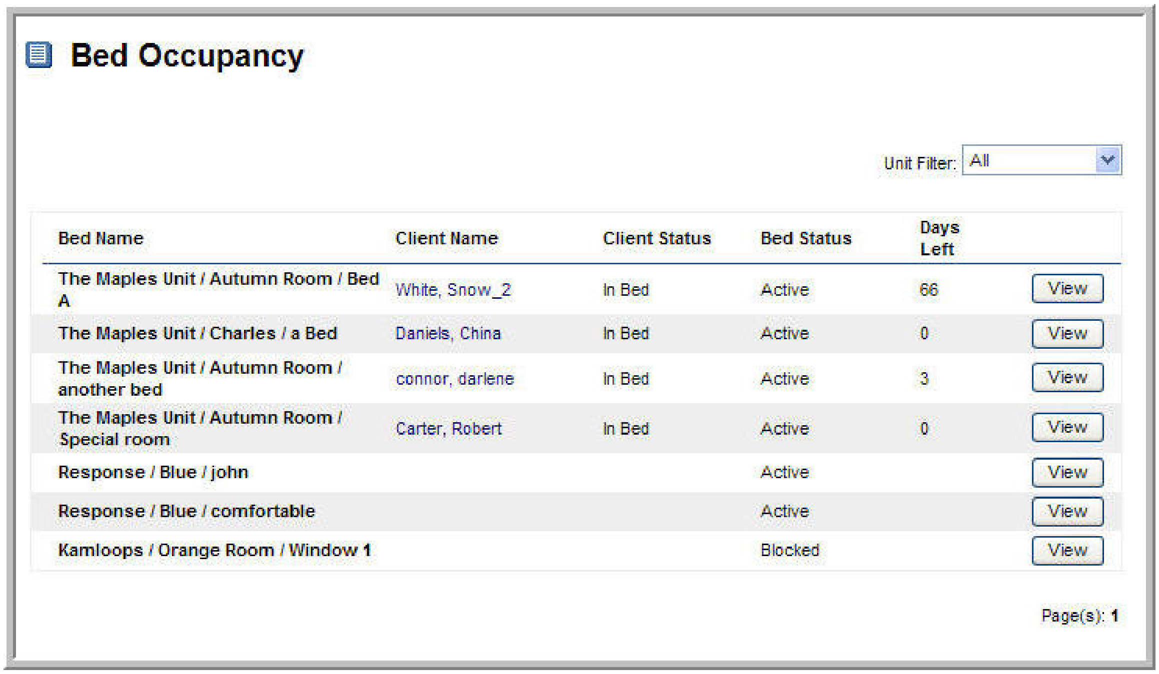


4. Add a note, if appropriate, and click **Assign to Bed**.



The Client's reservation is automatically removed and his/her bed occupancy is now displayed in the "Occupancy" window.

1. Open Beds in the Navigation Tree.
2. Click **Occupancy.**



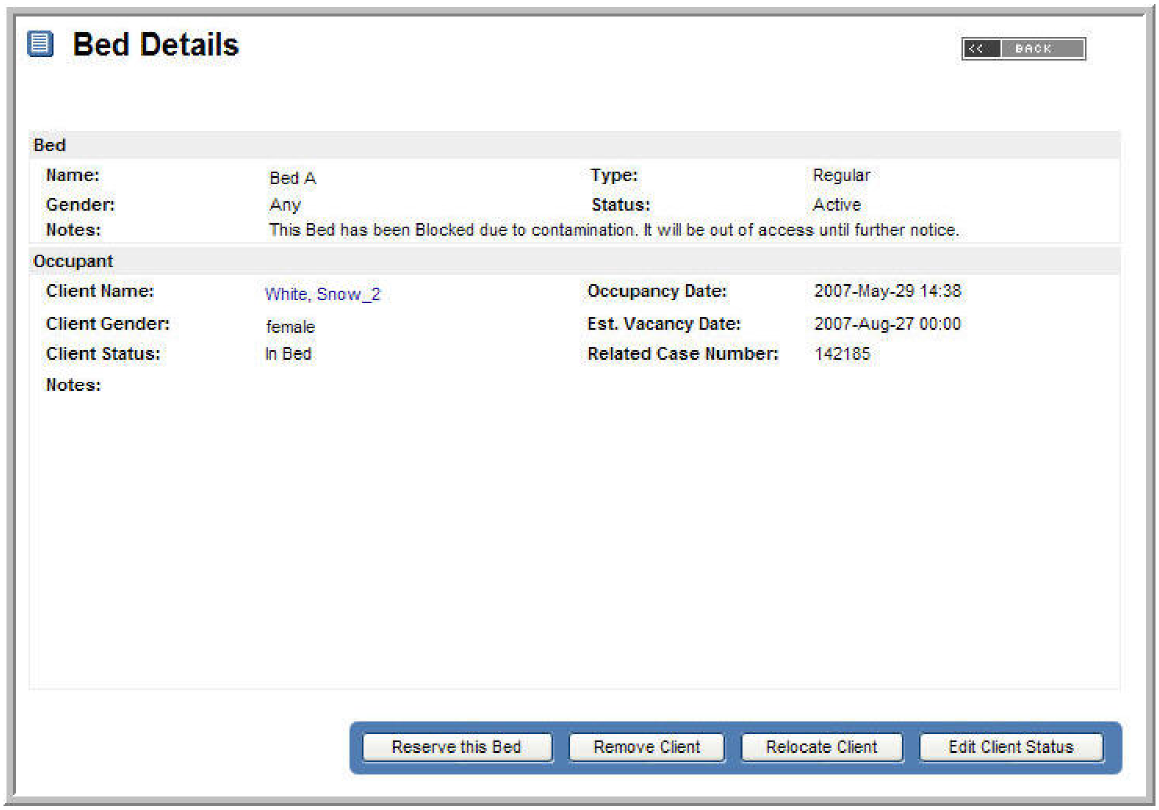
Bed Name	Client Name	Client Status	Bed Status	Days Left	
The Maples Unit / Autumn Room / Bed A	White, Snow_2	In Bed	Active	66	View
The Maples Unit / Charles / a Bed	Daniels, China	In Bed	Active	0	View
The Maples Unit / Autumn Room / another bed	connor, darlene	In Bed	Active	3	View
The Maples Unit / Autumn Room / Special room	Carter, Robert	In Bed	Active	0	View
Response / Blue / john			Active		View
Response / Blue / comfortable			Active		View
Kamloops / Orange Room / Window 1			Blocked		View

Page(s): 1

Exercise 1

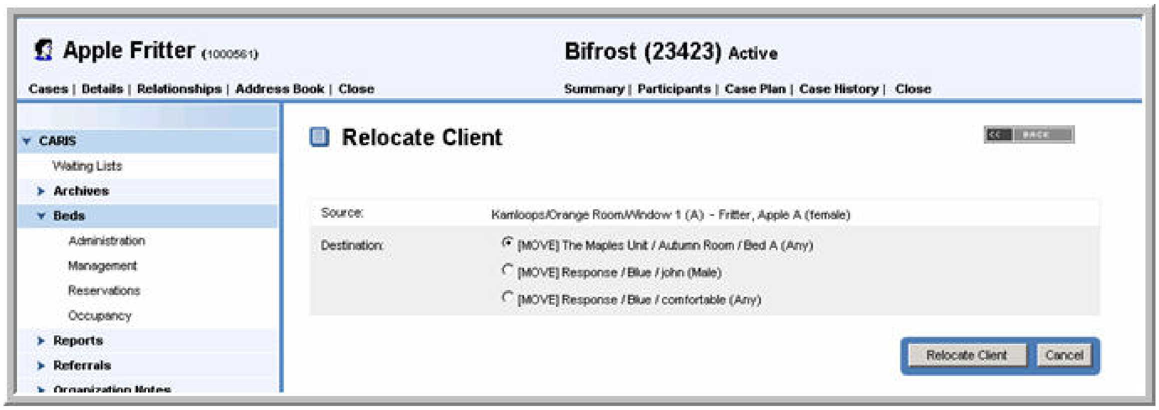
1. Admit a client and assign the client to a bed.

Once a client has been assigned to a bed, several actions can be performed.

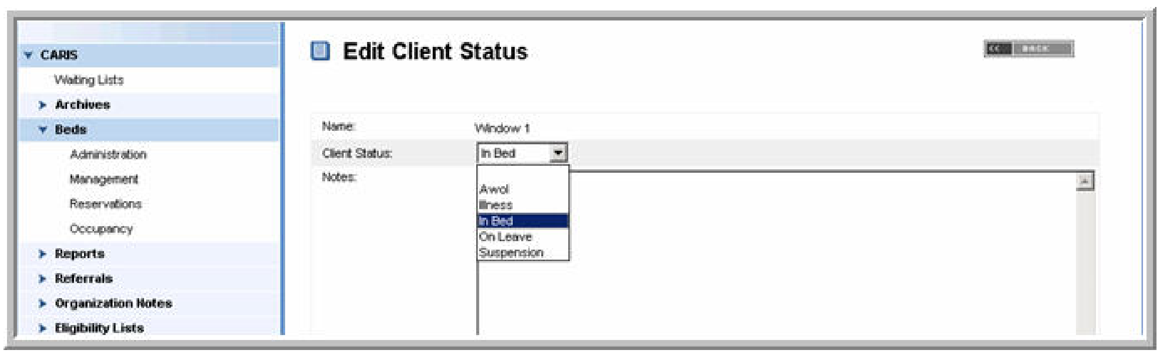


1. To reserve this bed for the client on another date, click **Reserve this Bed**.
2. To remove the client, click **Remove Client**.

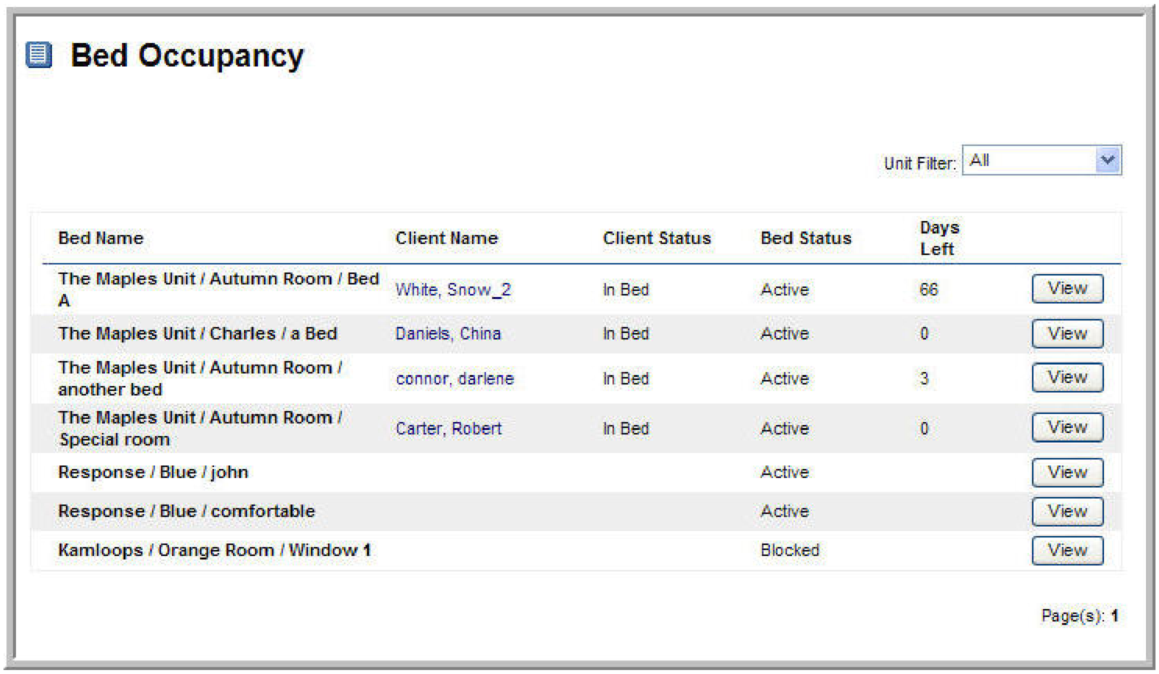
3. To move the client to another bed, click **Relocate Client**. The client must have days left for this option to be available.

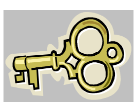


4. To change the client bed status, click **Edit Client Status.**

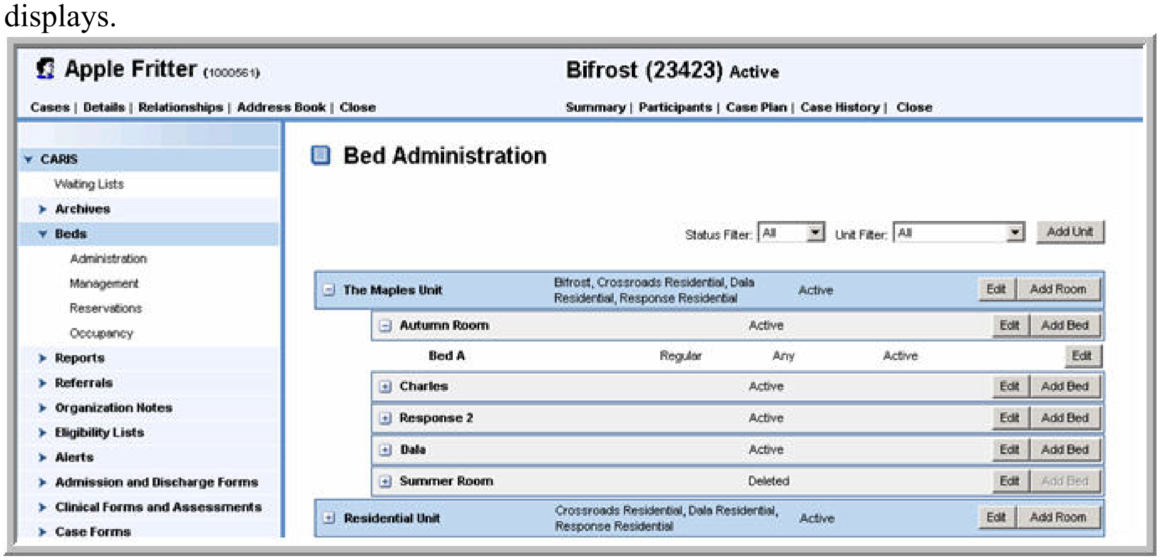


5. Clicking **Client Name** on the Bed Occupancy page links to the client details.



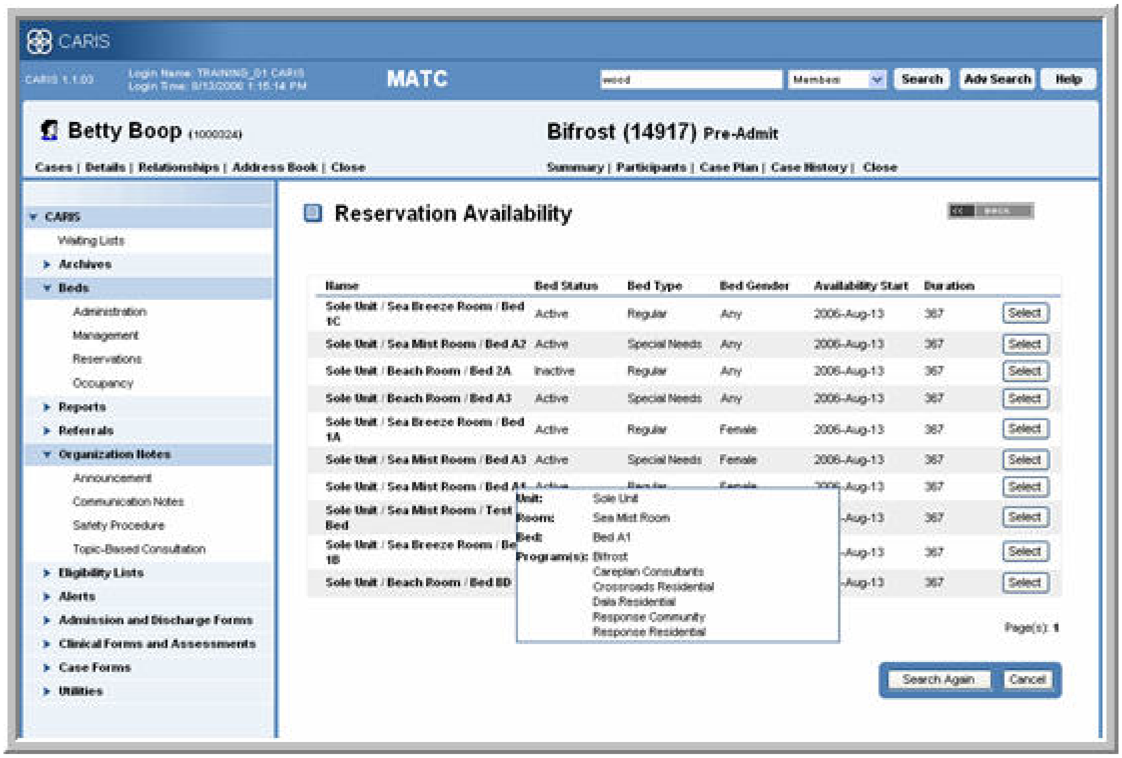


When you open the Bed Administration menu in CARIS context, you will see that the solid blue lines indicate specific "Units". When you expand a "Unit", the list of rooms will be shown, and when you expand each room, the bed information for that room displays.

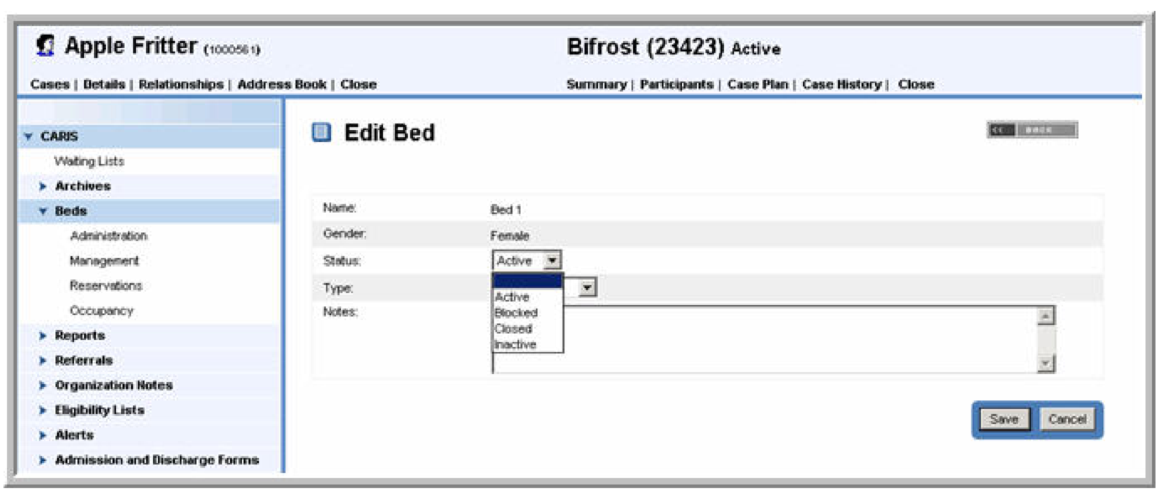


To reserve a room, you must be in Client/Case context. To assign a bed, the case must be in active phase.

Hovering with your mouse over a record will display the program areas for which this bed could be reserved.



Beds have a status of active, inactive, blocked, or closed. A bed that is blocked can be overridden by a high level user.



Exercise 2

1. Reserve a bed for a client with a case in active phase.
2. Assign the client to the bed.
3. Relocate the client to a bed in another unit.

Learning Checkpoint

1. To assign a client to a bed what must you do first?

____

2. Once a client has been assigned to a bed, what actions can be performed?

____

____

____

____

____

3. Name three client bed statuses?

____

____

Module 10: Reports

At the end of this module, participants will be able to:

1. Access the Reports menu
2. Create a report.

CARIS has a number of reports that can be generated online. These reports can be found from the Navigation Tree under Reports. The current list of reports includes the following:

CARIS Usage Report
Case Load Report (by Case Types)
Case Load Report (by Members)
Case Load Snapshot Report (by Case Types)
Case Load Snapshot Report (by Members)
Bed Utilization Report
Waiting List Duration
Case Notes Report
Case Face Sheet
Alerts Report

These reports can be accessed in CARIS context.

Report Terms

When the report appears, it will have a header box at the top underneath the report title. It is important to review the information in this box before reviewing the report as it will tell you the following:

Report Period: The start and end dates you chose as parameters for this report.
Report Date: the day on which this report was run by you.
The **parameters** you chose from the options available (e.g. Include Detailed Tables: Not Included).
The **filters** you applied (e.g., will list the members you chose if running a workload report).

To create a report:

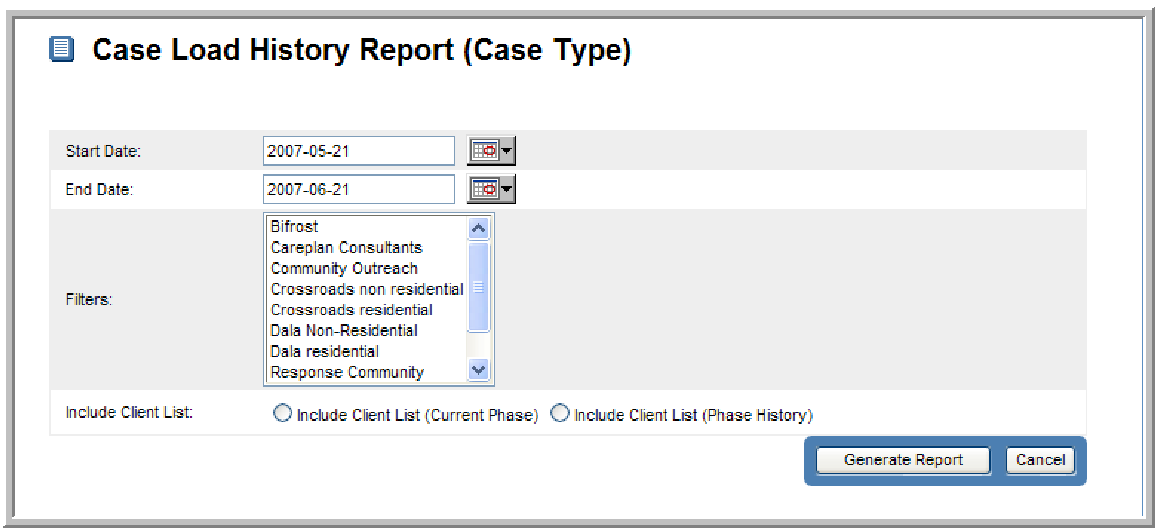
1. Open Reports in the Navigation Tree.
2. Select the report of interest.
3. Set the filters.
4. Click **Generate Report.**

Reports can be exported to an Adobe PDF file by clicking **Export PDF**. The Alerts report can be exported to Word by clicking **Export Word**.

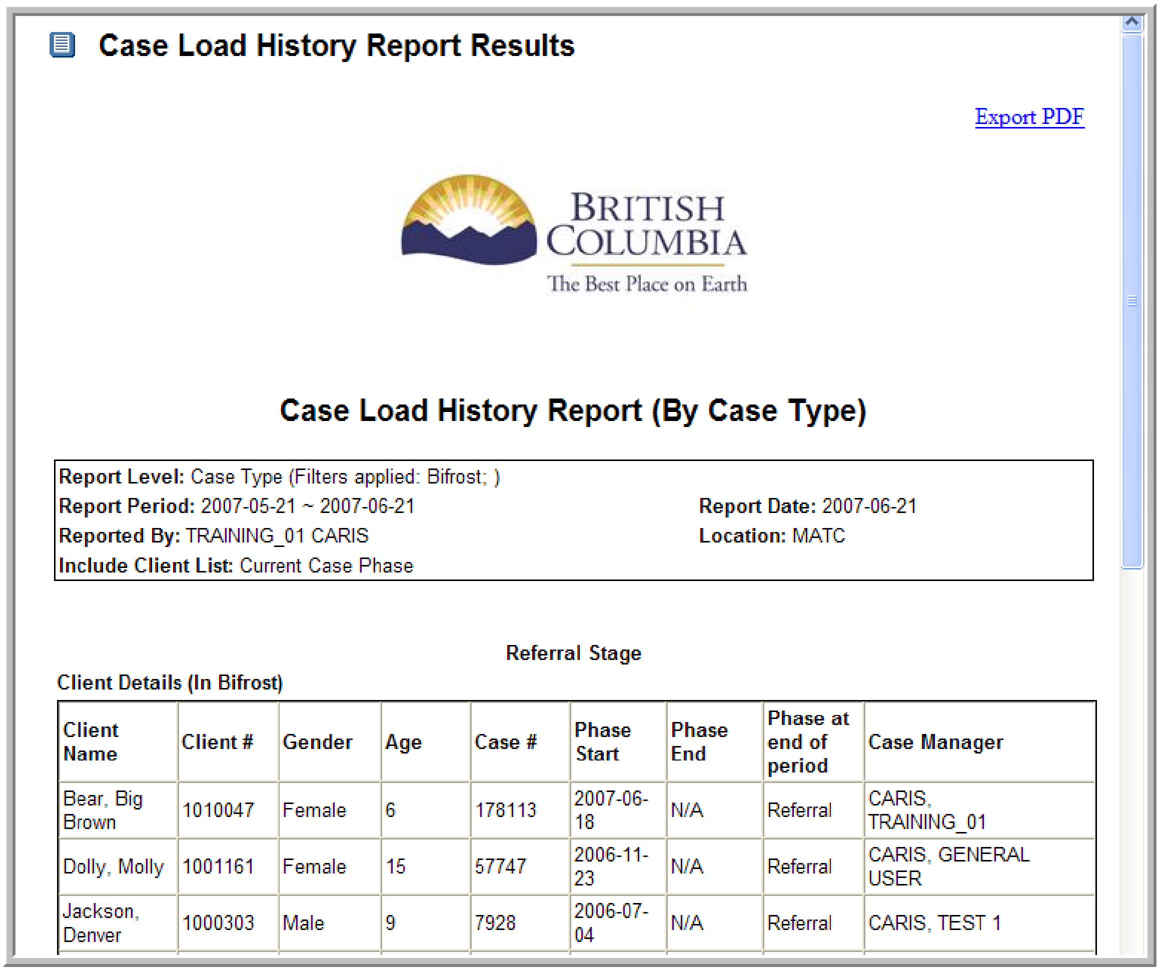
Case Load Report (By Case Type)

This report can be used to give you information about how many clients are being seen in your location, and their phase of service, either with the names of the clients included, or just the numbers.

Without Selecting Client List: For any selected time period you will get the numbers in each phase of service and, in addition, the totals by age and gender.



Current Case Phase Client List: For each case phase for any selected time period for all current (not closed) clients, you will get client name, number, gender, age, case number, phase start and end date, phase at end of time period, case manager and, in addition, totals by age and gender.



Case Load History Report Results

Export PDF

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Case Load History Report (By Case Type)

Report Level: Case Type (Filters applied: Bifrost;)
Report Period: 2007-05-21 ~ 2007-06-21 **Report Date:** 2007-06-21
Reported By: TRAINING_01 CARIS **Location:** MATC
Include Client List: Current Case Phase

Referral Stage

Client Details (In Bifrost)

Client Name	Client #	Gender	Age	Case #	Phase Start	Phase End	Phase at end of period	Case Manager
Bear, Big Brown	1010047	Female	6	178113	2007-06-18	N/A	Referral	CARIS, TRAINING_01
Dolly, Molly	1001161	Female	15	57747	2006-11-23	N/A	Referral	CARIS, GENERAL USER
Jackson, Denver	1000303	Male	9	7928	2006-07-04	N/A	Referral	CARIS, TEST 1

Case Phase History: For each case phase for any selected time period for all clients for each phase (except closed) you will see all of the above, but this report also shows each phase the client has been in, so Referral Phase is the longest list of clients, Follow-Up is the shortest.

Case Load Report (By Member)

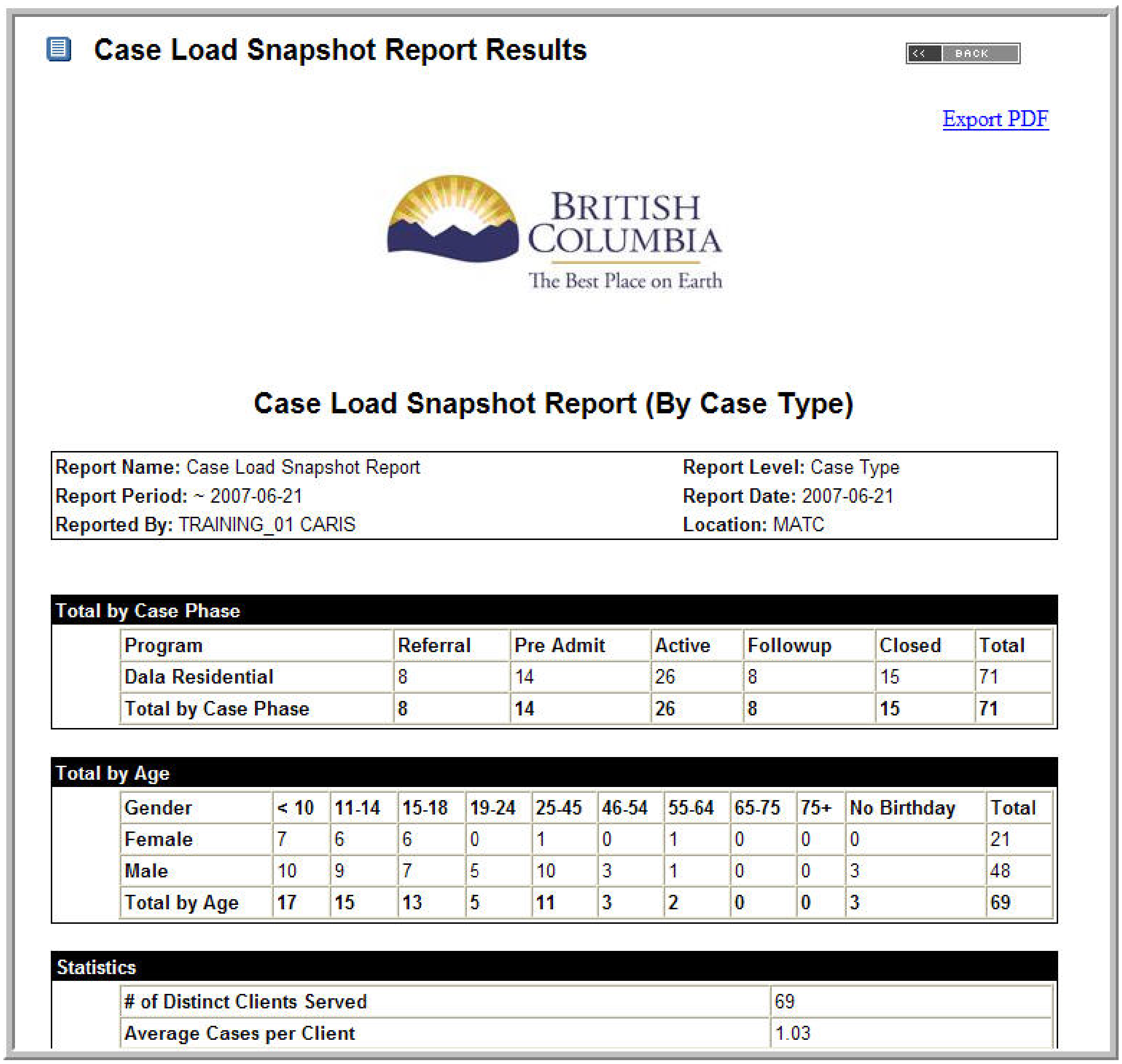
These reports give similar information to the Case Load Reports, but include the Members of the team who are involved in the case. Filters allow the user to select specific Members or all Members.

Case Load Snapshot Report

The Case Load Snap Shot Reports are far simpler than the Case Load Reports. They provide information for a single day (selected by the user) and do not allow the user the option of seeing client names.

By Case Type: This report will give you the numbers of cases at each phase of service.

By Member: This report will give you the numbers of cases for each CARIS Member for each phase of service. The user can select which Members' case information will be generated in the report.



Case Load Snapshot Report Results

BACK

Export PDF

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Case Load Snapshot Report (By Case Type)

Report Name: Case Load Snapshot Report	**Report Level:** Case Type
Report Period: ~ 2007-06-21	**Report Date:** 2007-06-21
Reported By: TRAINING_01 CARIS	**Location:** MATC

Total by Case Phase

Program	Referral	Pre Admit	Active	Followup	Closed	Total
Dala Residential	8	14	26	8	15	71
Total by Case Phase	8	14	26	8	15	71

Total by Age

Gender	< 10	11-14	15-18	19-24	25-45	46-54	55-64	65-75	75+	No Birthday	Total
Female	7	6	6	0	1	0	1	0	0	0	21
Male	10	9	7	5	10	3	1	0	0	3	48
Total by Age	17	15	13	5	11	3	2	0	0	3	69

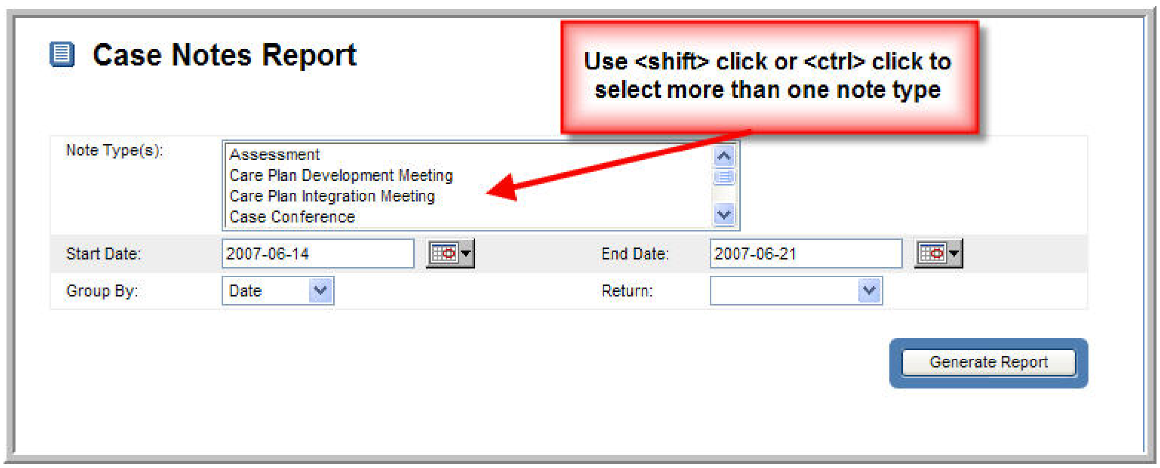
Statistics

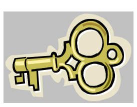
# of Distinct Clients Served	69
Average Cases per Client	1.03

Case Notes Report

One of the advantages of writing your case notes in CARIS is that you will be able to print case notes selectively by choosing particular time periods and particular note types or combinations of note types. If you wanted, you could select all note types and just print them chronologically. You can then use the printed reports for your own information, to bring to team or supervision meetings, for review by consulting psychiatrists, etc.

1. Open Reports in the Navigation Tree and then Case Notes Report.
2. Use the ctrl key to select more than one note type.
3. When the report appears, it can be printed for the paper file by exporting the report to pdf.

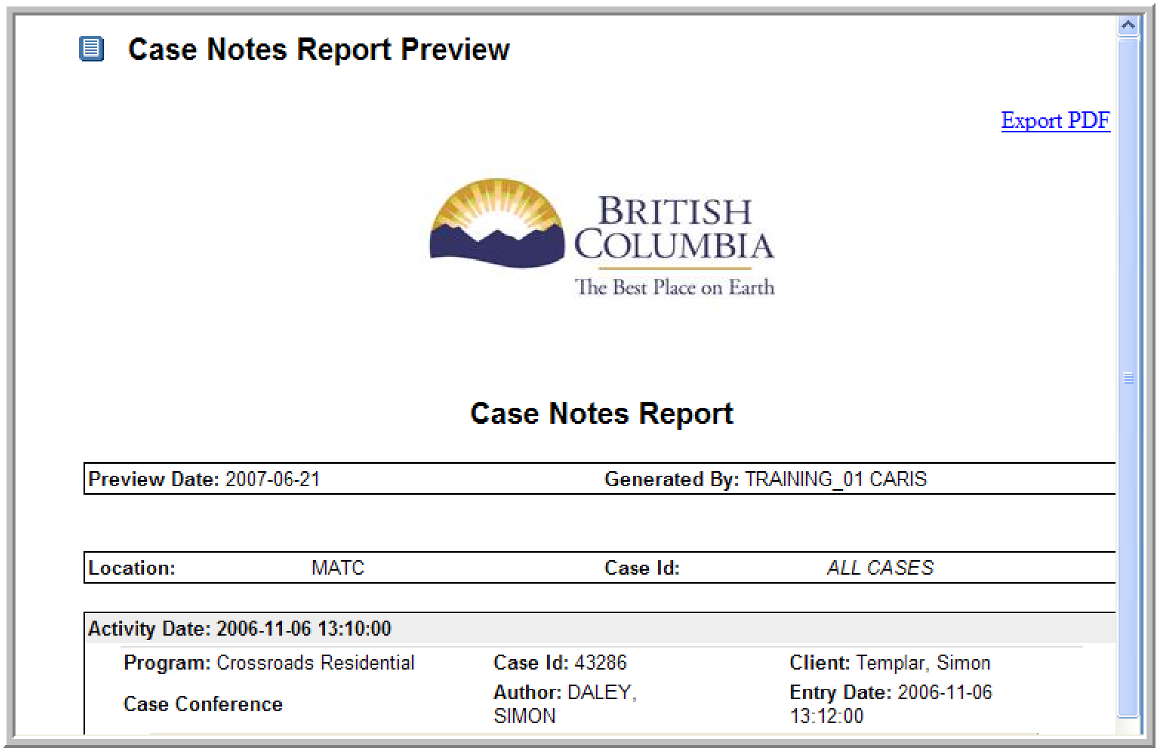




Use highlighting to choose more than one note type for your report. If you are in case context, the report will be for just the one case.

If you are out of case context, the report will be for your cases. You may choose “Active” or “All” and group by Date/Entry type.

This is a convenient way to catch up on notes that may have been added to the file while you were out of the office.



Case Notes Report Preview

Export PDF

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Case Notes Report

Preview Date: 2007-06-21	**Generated By:** TRAINING_01 CARIS

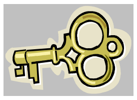
Location:	MATC	**Case Id:**	*ALL CASES*

Activity Date: 2006-11-06 13:10:00

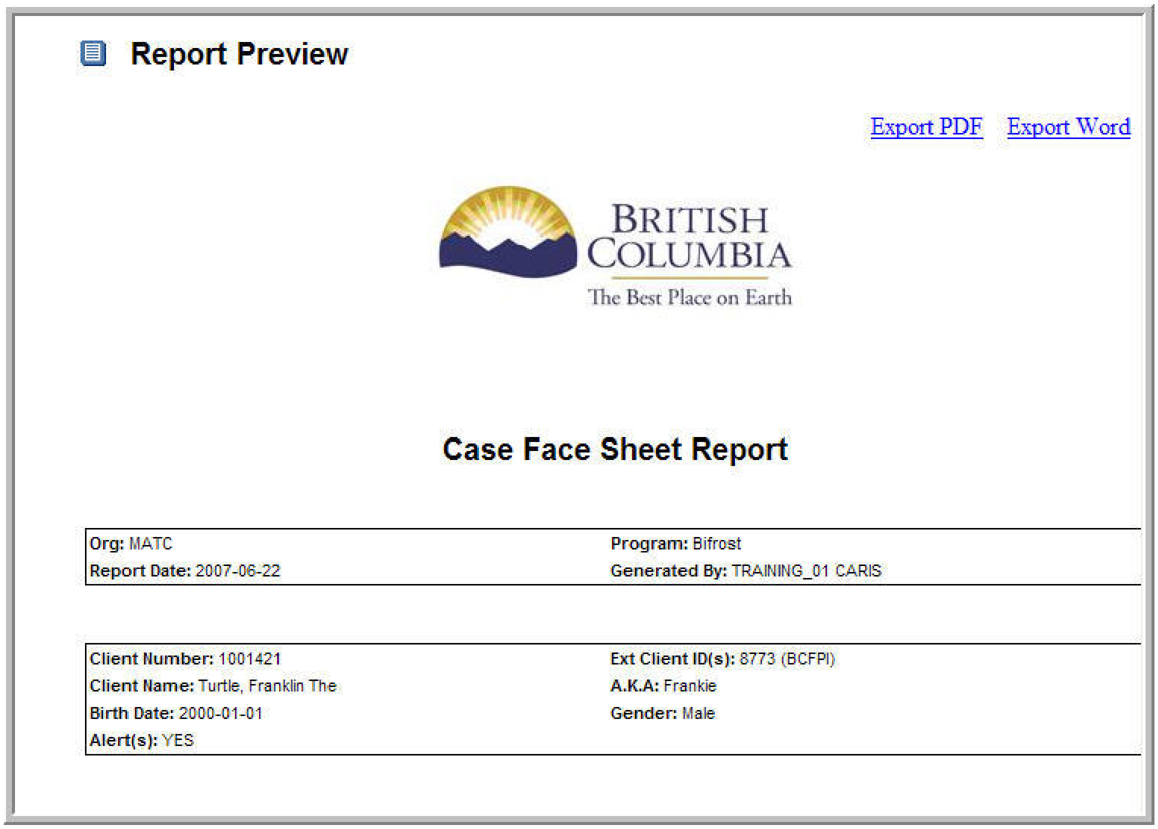
Program: Crossroads Residential	**Case Id:** 43286	**Client:** Templar, Simon
Case Conference	**Author:** DALEY, SIMON	**Entry Date:** 2006-11-06 13:12:00

Case Face Sheet Form

1. Open Admission and Discharge Forms in the Navigation Tree and then Case Face Sheet.
2. Mark the radio boxes as appropriate and click Generate Report. If no radio boxes are chosen, the client's basic demographic information will be displayed. (Note: the radio boxes allow you to control the content of the report. When the report displays, you can re-order the content by dragging and dropping with your mouse.)
3. When the report appears, it can be printed for the paper file by exporting the report to pdf or Word.

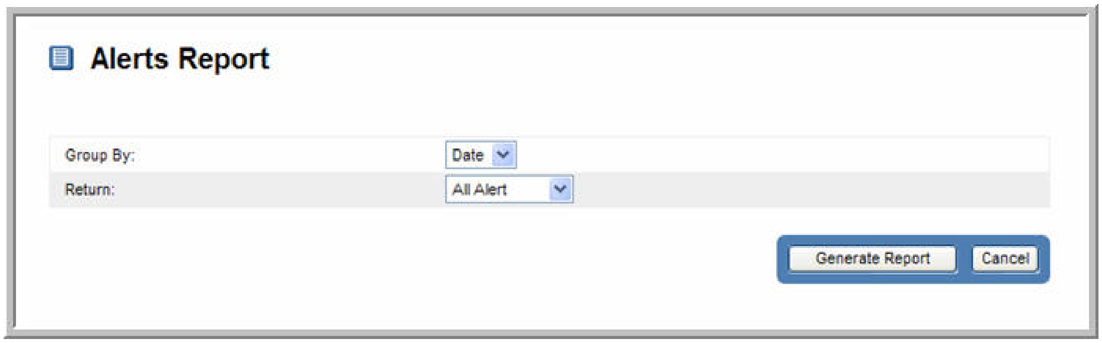


Case Face Sheet: The tick boxes allow you to choose the content for this report. When the report display, you can reorder the content by dragging and dropping the sections. Print by clicking **Export to PDF**. (There is no option to Export to Word because Word documents can be easily edited.)



Alerts Report

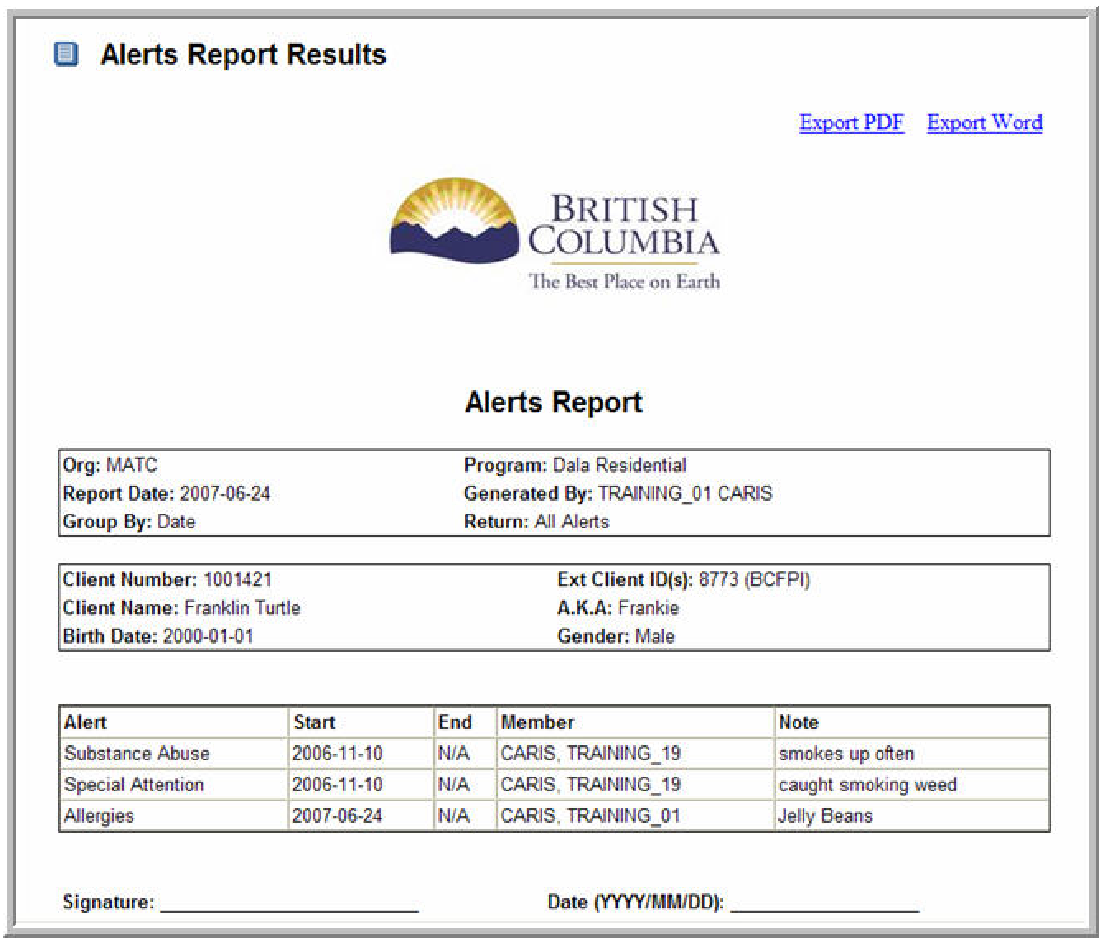
1. Open Reports on the Navigation Tree and then Alerts Report.
2. Choose your filters. Click **Generate Report**.



Alerts Report

Group By:	Date
Return:	All Alert

Generate Report | Cancel



Alerts Report Results

Export PDF Export Word

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Alerts Report

Org: MATC	**Program:** Dala Residential
Report Date: 2007-06-24	**Generated By:** TRAINING_01 CARIS
Group By: Date	**Return:** All Alerts

Client Number: 1001421	**Ext Client ID(s):** 8773 (BCFPI)
Client Name: Franklin Turtle	**A.K.A:** Frankie
Birth Date: 2000-01-01	**Gender:** Male

Alert	Start	End	Member	Note
Substance Abuse	2006-11-10	N/A	CARIS, TRAINING_19	smokes up often
Special Attention	2006-11-10	N/A	CARIS, TRAINING_19	caught smoking weed
Allergies	2007-06-24	N/A	CARIS, TRAINING_01	Jelly Beans

Signature: ______________________ **Date (YYYY/MM/DD):** ________________

Exercise 1

1. Bring a client and case into context, access the list of available reports, and run the Case Face Sheet report. Export the report to an Adobe PDF file.

Learning Checkpoint

1. Where do you find the list of CARIS reports?

___

2. How do you produce a hard copy, printed report?

___

Appendices

Glossary of CARIS Terms

Navigation Tree: Case Forms

Learning Checkpoint Answers

Case Study

Glossary of CARIS Terms

The glossary defines terms used in CARIS. Sometimes the meanings are somewhat different from normal usage, but have a special meaning within the context of the application.

Activities:	A record of actions taken by the user either in a general operational sense or specific to a client or case.
Affiliate:	Someone involved with a client’s case, but who does not have access to CARIS. In CARIS, examples of affiliates are a family member, social worker, minister, police officer, physician or probation officer.
Case:	An episode of care.
Case Report:	A Case Report is an automatically generated report that summarizes the User’s cases using pre-established criteria.
Client:	The primary person in a Case who is receiving a service.
Contact:	A person of interest to a specific client, or of general interest. If the contact is of interest to a client, like a minister or relative, that person will be attached to a client’s file as a relationship. General contacts will just be listed, like a police officer, social worker or MLA – someone you may want to “contact”. A contact cannot view a Case File and generally does not have access to CARIS.
Context:	It is possible to be in “CARIS Context,” “Client Context,” or “Case Context.” The Contexts limit the amount of access you have to information and are indicated by the presence or absence of a client name and/or case in the Context Bar.
Critical Date:	The specific date upon which a particular event either did occur or should occur in the future.
End Date:	The date upon which an event is scheduled to end.
Member:	A person who has access to CARIS. Only Maples staff and contactors can be members of cases.
Organization:	Government or social service agencies associated with the activities and/or clients of MCFD.
Partner:	A Partner is an individual or a group who is working in association with a person or group in the agency.
Recipient:	A Recipient is an individual or a group who represents the “audience” for an activity or event.

Relationship: Someone attached to a client's file other than an affiliate. A "relationship" can be a contact, a member or another client. This is in general used for family members.

Referral: The process of "referring" a client to another authorized person within the business domain of CARIS with the additional element of where the individual client has come from, i.e., self referral, agency contact, walk in, etc. Can also mean the process of opening a new case for a client. Basically "New Referral" means "Start a New Case".

Start Date: The date upon which an event is scheduled to start.

Transfer: The process of providing responsibility for the client to another agency or program. This involves complete case file transfer and authority to the receiving agency.

Glossary of Report Terms

Start: Number of cases that exist in each phase at the beginning of reporting period
New: Number of new cases that entered into each phase during the reporting period
Gross: Number of total cases (Start plus New) that existed in each phase during the reporting period
Reject: Number of Rejected Referrals that occurred during the reporting period
Cancel: Number of Cancelled Cases that occurred during the reporting period
End: Number of cases remaining in each phase at the end of the reporting period
Report Period: the start and end dates of the reporting period as chosen by the user
Filter: indicates the items you chose from a list that narrows the report results to the items listed in the filter

Navigation Tree: Case Forms

CARIS Survival Tips

- Click the Refresh button often
- Save your data before you move onto the next screen
- Allow three frames to load before proceeding
- Use CARIS context for most searches
- The notes on General alerts can only been viewed in the location where they were created
- View your address book carefully. Make sure you have the current address for the client and not one of the addresses for relations/contacts.
- If you are going to change an address, end the old address first and add a new address
- If a client's parents are case participants, they may have to be added to the case as affiliates. This way their attendance in case activities can be recorded.
- Client details can be seen by anyone in CARIS
- On the Single Document Processing window, the date is the date of the document
- For attaching reports, the office and typist responsible for the report will attach it using Document Management Processing
- You can sort My Cases "Case List" by location code, client name, etc. by clicking on the column name/header
- Clients always show Date of Birth
- Sort your cases with a filter or by clicking on the title bar
- Remember to assign yourself to a case in client context, open Cases

Learning Checkpoint Answers

Module 1

1. CARIS, Client, and Case
2. (a) The banner is blank. (b) Main, Activities, My Cases
3. (a) The client's name is in the banner on the left.
   (b) Cases, Details, Relationships, Address Book, Close
4. (a) The case name is in the banner on the right.
   (b) Summary, Participants, Case Plan, Case History, Close
5. Click My Cases in CARIS context.

Module 2

1. Referred on, Advocacy, Information, Services, Education
2. Conference, Consultation, Lecture, Training/Education, Workshop
3. Search Activities in CARIS context
4. No
5. Waiting List, Bed Reservations, Transfers, Eligibility Lists

Module 3

1. (a) Client (b) Details
2. Social or Family (b) selection determines the options for the next field
3, In the client's address book.

Module 4

1. Members and Affiliates
2. Members have access to CARIS, Affiliates do not.
3. Notes field
4. General and Supervisory

Module 5

1. Goal, Objective, Action
2. My Cases, View, Case Plan from CARIS context

Module 6

1. Meeting Minutes, Psychiatric Admission Notes, Diagnostic Classification Formulation, Child Care/Nursing Admission Note, Discharge Form.
2. Meeting Minutes, Psychiatric Admission Notes, Child Care/Nursing Admission Note.

Module 7

1. DSM-IV(TR) Diagnostic Classification, ICD 10, Diagnostic Classification Formulation, Medications, Psychological Test Management.

Module 8

1. Meeting and Contact Note, Attach File, Progress Notes, Correspondence Log, Document Management, Health Visit, Legal Order, Presenting Issues.
2. Assessment, Care Plan, Clinical Meeting, Shift Change ….

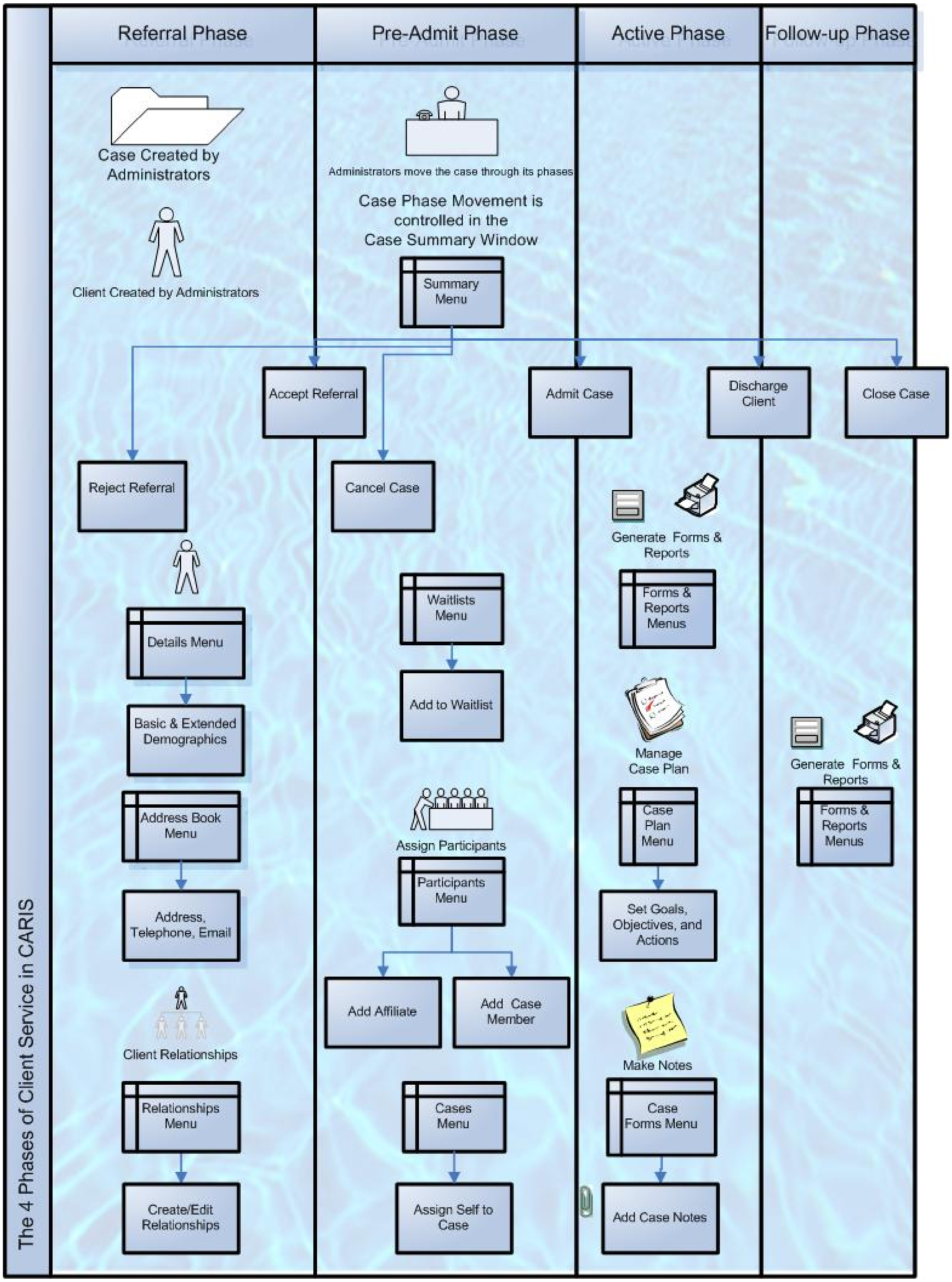
Module 9

1. Search for bed availability.
2. Remove the client from the bed, move the client to another bed, reserve this bed for the client on another date.
3. AWOL, illness, in-bed, on leave, suspension.

Module 10

1. Navigation tree.
2. Generate report online, export to pdf or Word, print from the application.

The 4 Phases of Client Service



Case Study – Maples Line Staff

1. You receive a referral from Maples for a client who may be admitted to Maples for treatment (TIP: look in My Cases choose a case in Referral phase). If the client does not have an address, please add a home address. Fill in the Extended Demographics mandatory fields: use “unknown” in fields or choose another value (TIP: mandatory fields are “Aboriginal Origin”, 10 digit PHN, Guardianship status, Ethno-cultural background).
2. Add the following relationships to this client’s file: a family member and a friend. For each contact, create an address, telephone number and/or email address. Relate the contacts to the client. (TIP: in client context, Relationships, search for a “Contact”)
3. The referral has been reviewed and no reason has been found for the case to be rejected. Accept the referral. (If mandatory information is required, a missing criteria message should appear, and you must go back and fill in this information). (TIP: case context, Summary, **Accept Referral**)
4. Your client has begun treatment. Admit your case. (TIP: case context, Summary, **Admit**)
5. Assign a social worker, a program coordinator, and psychiatrist as participants (members) your case. Use the CARIS training IDs, because members are not loaded into the training site. (Search for members using “CARIS” as your search criteria.) (TIP: Case context, Participants, search members, **View**, **Add to Case**)
6. Now that your client has been admitted, create and save a Meeting and Contact Note to record the intake meeting. After creating the Meeting Note, you realize you need to record another detail about the meeting. Open the note and edit it. Save the Meeting Note with its changes. (TIP: case context, Case Forms, Meeting & Contact Note)
7. (NOTE: some case types may not permit this exercise) During your client’s mental status exam, the extent of your client’s schizophrenia was determined. The psychiatrist participating in the case has prescribed an initial dosage of 10 mg of Olanzaphine per day for your client. You need to add a record of the medication to your client’s file. (TIP: Case context, Clinical Forms and Assessments, Medications)
8. You find out that your client’s family member (whom you added in #2) died two days ago. End the relationship with your client (TIP: Client context, Relationships, **Edit** , you will be able to end relationship as of <today’s date>). You should edit the family member’s contact info to record their date of death (TIP: click on their name in your client’s “Relationships” window and this will link you to their personal details, **Edit Contact**)
9. The primary care team and the clinical team discuss the expectations of the treatment and set basic goals for your client. Enter the Case Plan that was discussed into CARIS. Create a Goal, one objective and one action. (TIP: Case context, Case Plan, Create Goal)

10. (NOTE: some case types may not permit this exercise) Record a Progress Note that is related to the achievement of one of the objectives of the Case Plan you have entered for this client.
11. Discharge your client (TIP: case context, Summary, **Discharge**). Note: you may have to fill out a Discharge Form if CARIS presents an error message (TIP: Admission and Discharge Forms, Discharge Form)
12. Generate the Case Face Sheet for this case and export it to a PDF document as if you were going to print it (TIP: Reports, Case Face Sheet)
13. Close the case (TIP: case context, Summary, **Close Case**). Note: you may have to complete your action, objective, and Goal if CARIS presents an error message (TIP: Case Plan, **Edit** the action first and change "status" to "completed" and use today's date as the "End date", then **Edit** the objective and change its status, and then **Edit** the Goal and change its status.)