



BC Ministry of Children and  
Family Development

# Community and Residential Information System (CARIS)



Administrators' Training Manual  
Maples Adolescent Treatment Centre  
February 2007



TRI – Technology Resource Inc.

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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
5. Manage facilities and record events
6. Discuss new business processes

## **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

Menu commands are underlined

“Field” or “Window Names” are in quotes



If you see this icon, the following text marks important reference information.

## **Training Support**

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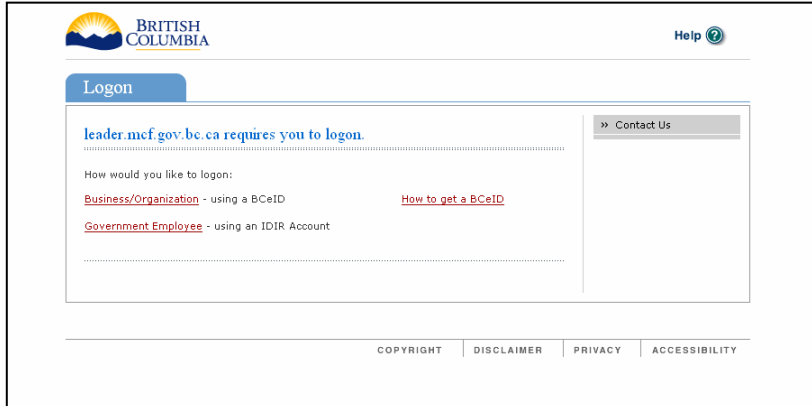
## Module 1: CARIS at First Glance

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  on your computer desktop)
2. Type in the following address: <https://leader.mcf.gov.bc.ca/CARIS>
3. Choose Government Employee and type in 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 to display more information by clicking on the + sign.

6. Click on the small number 2 at the bottom of the page to go to the next page.

**TRAINING\_01 CARIS**

Please select a location and a role to log-in to CARIS interface.

<input type="checkbox"/> PSDHH	PSDHH	
<input type="checkbox"/> MATC	MATC	
MATC - Administrator		<input type="button" value="Select"/>
MATC - Power User		<input type="button" value="Select"/>
MATC - General User		<input type="button" value="Select"/>
MATC - Lite User		<input type="button" value="Select"/>
<input type="checkbox"/> YFPS	IAU	
<input type="checkbox"/> YFPS	BYC	
<input type="checkbox"/> YFPS	YSAM	
<input type="checkbox"/> YFPS	BOC	
<input type="checkbox"/> YFPS	GVR	
<input type="checkbox"/> YFPS	VROC	
<input type="checkbox"/> YFPS	CGR	
<input type="checkbox"/> YFPS	LOC	
<input type="checkbox"/> YFPS	FVR	
<input type="checkbox"/> YFPS	POC	
<input type="checkbox"/> YFPS	PYCC	
<input type="checkbox"/> YFPS	PR	
<input type="checkbox"/> YFPS	IC	

Page(s): 1 2

7. Choose MATC – Power User and click **Select**

**TRAINING\_01 CARIS**

Please select a location and a role to log-in to CARIS interface.

<input type="checkbox"/> YFPS	POC	
<input type="checkbox"/> YFPS	FVR	
<input type="checkbox"/> YFPS	LOC	
<input type="checkbox"/> YFPS	CGR	
<input type="checkbox"/> YFPS	VROC	
<input type="checkbox"/> YFPS	GVR	
<input type="checkbox"/> YFPS	BOC	
<input type="checkbox"/> YFPS	YSAM	
<input type="checkbox"/> YFPS	BYC	
<input type="checkbox"/> YFPS	IAU	
<input type="checkbox"/> MATC	MATC	
MATC - Administrator		<input type="button" value="Select"/>
MATC - Power User		<input type="button" value="Select"/>
MATC - General User		<input type="button" value="Select"/>
MATC - Lite User		<input type="button" value="Select"/>

Page(s): 1 2



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. In the right margin click the link called Secure Services:

**iCONNECT** WELCOME to the MCFD Intranet

Our News October 10, 2006

**Announcing the Provincial Child Care Subsidy Service Centre**  
Child Care Subsidy Services are now provided by the Provincial Child Care Subsidy Service Centre (CCSSC) for British Columbia. For more information [click here](#).

**Foster Family Month Celebrates Unseen Heroes**  
The B.C. government has proclaimed October as Foster Family Month to recognize and honour the dedication of the province's foster parents, Children and Family Development Minister Tom Christensen announced today.  
[Read More](#) October 1, 2006

**Celebrating Our Successes**  
Each month, we feature stories in our "Celebrating Our Successes" section about ministry activities, achievements and special events from across the province. [Click here](#) to read the most recent activities and accomplishments.

**Welcome to Your New Intranet Home Page!**  
Welcome to your newly redesigned intranet home page! To find out what's new and read about the changes, [click here](#).

**We Want Your Feedback!**  
The new home page was focus-tested with various staff from across the regions and feedback received was very positive. We would like to hear what you think too. If you have comments or suggestions, please fill out our [short questionnaire](#).

**Provincial Employees Community Services Fund (PECSF) Campaign**  
It's that time again - this year's PECSF campaign is now underway! Many exciting events and activities are already planned for the next two months. To find out what's happening in your area, click on the [Bulletin Board](#) to see events taking place near you!

**Employee Centre**

**Employee Links**

- iProcurement Logon
- iExpense Logon
- Time on Line
- Employee Portal
- Employee Self Serve
- Learning Management System
- MARS
- CAS Application Logon

**Secure Services**

**Employee Tips & Guides**

**Human Resources**

**Research Tools**

**Bulletin Board**

**A - Z Index**

Then click CARIS:

**MARS Support Staff**

**MARS**

**CARIS**

**CARIS Information & Support**

**IPAT**

**Adoption Management System**

**BCFPI**

**After Hours**

**Family Group Conference**

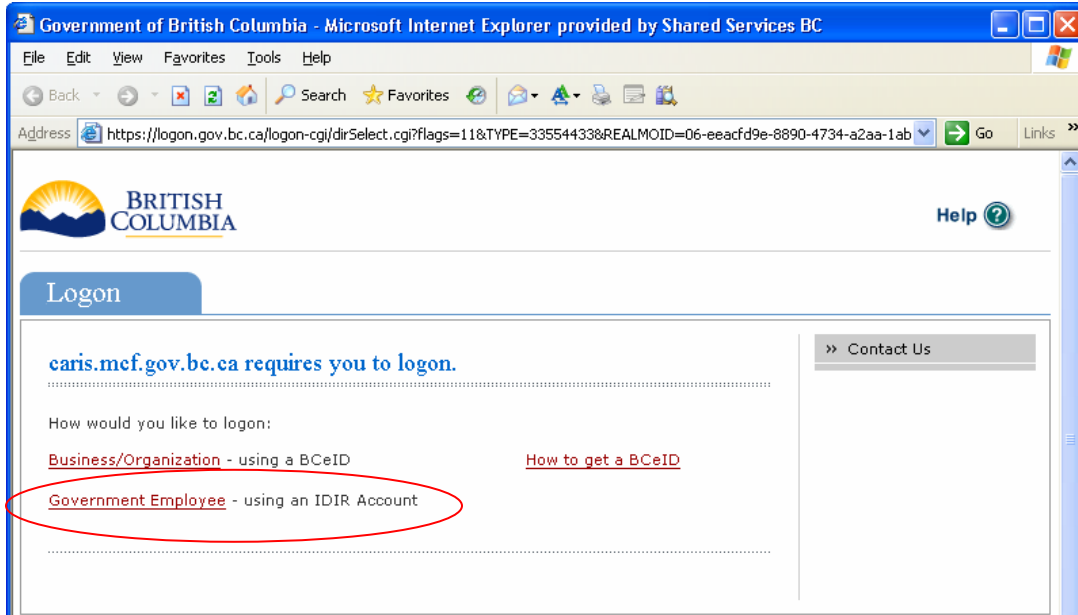
**Helpline**

**CAS Application Logon**

- Secure Services**
- Employee Tips & Guides**
- Human Resources**
- Research Tools**
- Bulletin Board**

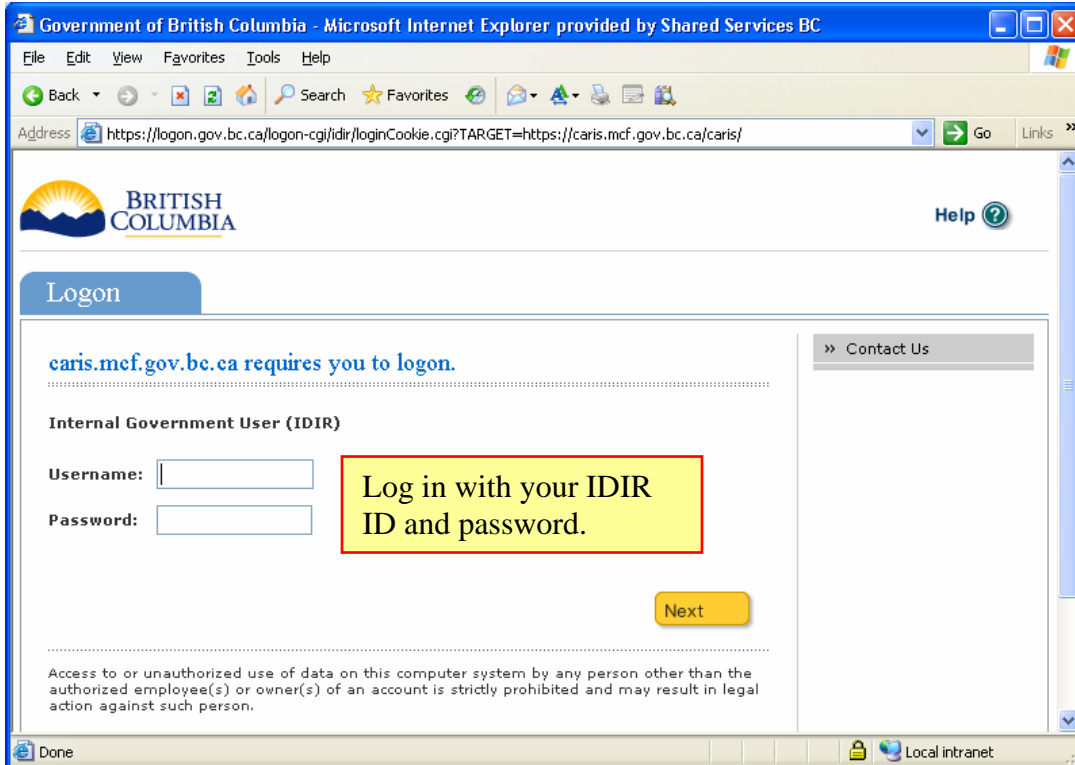
**A - Z Index**

Now you will see the log in page. Click Government Employee:

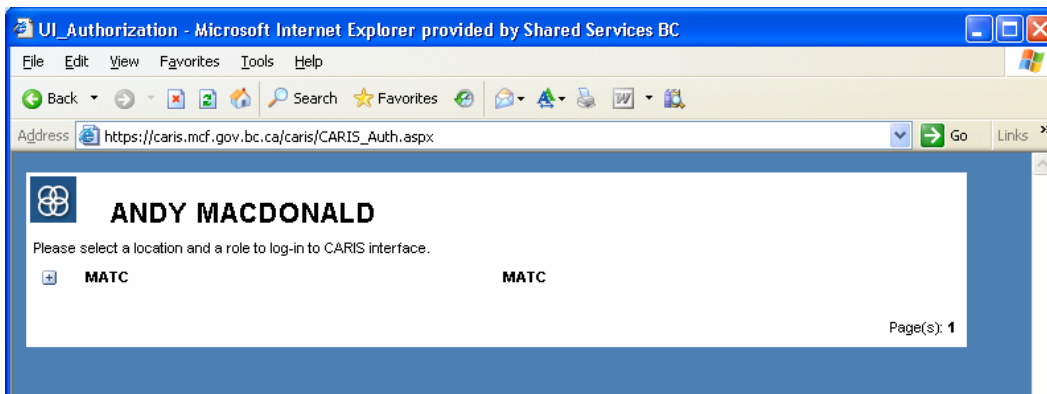




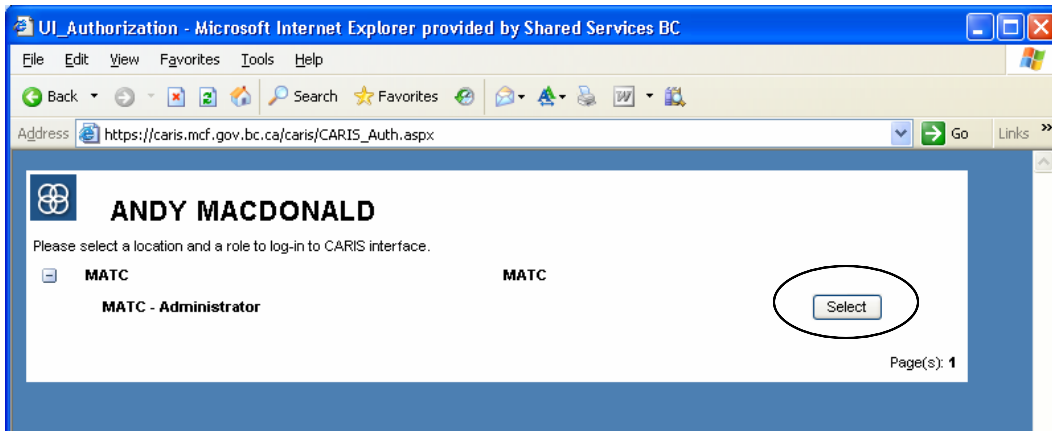
Then log in with your normal IDIR ID and password.



When you see this screen, click the + sign:



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

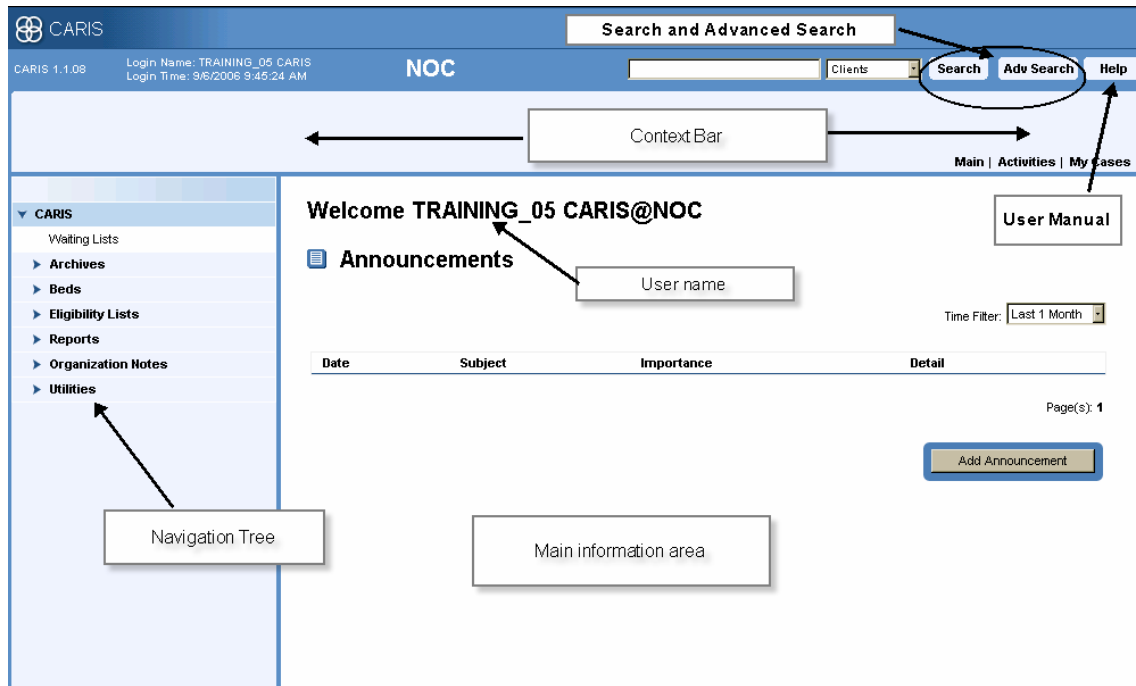


...and you are in.



If you are working with clients in more than one program area, you will need to log on to each program separately. To log on to another program area, just open another browser window.

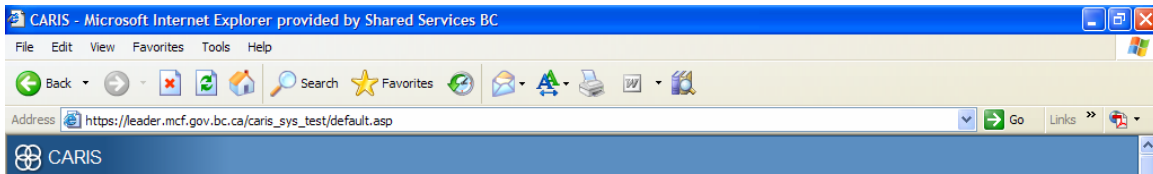
## View the Main Page



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.



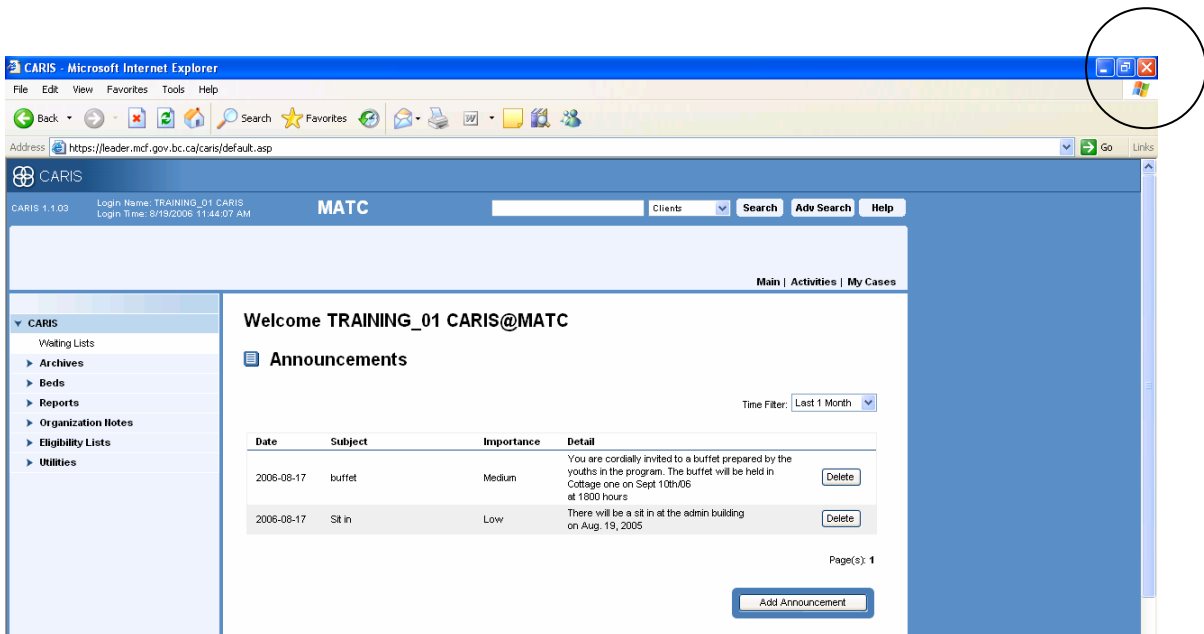
F11 will turn the browser functions off. DO NOT USE the browser functions to navigate through CARIS, particularly the back and forward arrows. These arrows will not work properly since they are browser functions, not CARIS functions.

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 Power 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.

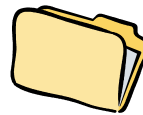
There are three contexts in CARIS:

- 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.

## CARIS Context

The screenshot shows the CARIS web application interface. The top navigation bar includes links for Main, Activities, and My Cases. The left sidebar contains a navigation tree with options like Waiting Lists, Archives, Beds, Reports, Organization Notes, Eligibility Lists, and Utilities. The main content area displays a welcome message for TRAINING\_05 CARIS@MATC, a list of announcements, and a table of announcements. Annotations highlight specific features: 1. List of cases (My Cases link), 2. User profile (Welcome message), 3. No client in context (empty client area), 4. No case in context (empty case area), and 5. Navigation tree (left sidebar).

**3. No client in context**

**4. No case in context**

**1. List of cases**

**2. User profile**

**5. Navigation tree**

Welcome TRAINING\_05 CARIS@MATC

**Announcements**

Time Filter: Last 1 Month

Date	Subject	Importance	Detail
2006-08-11	Subject	High	Announcing...
2006-08-10	High	High	High
2006-08-08	New List	High	A bunch of new Lists have been added, please review summary for more details

Page(s): 1

Add Announcement

1. A case worker's client files are accessible opening "My Cases" link at the upper right of the screen.
2. The desktop shows the user profile of the case worker who logged in.
3. The client information area is empty.
4. The case information area is empty.
5. 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.

**1. No Case in Context**

**2. Client demographic details are opened by clicking +**

**3. Edit client details**

**4. Case List for the selected client**

**Client Details (Potter, Harold)**

Basic Demographics	
Family Name:	Potter
Middle Initial:	...
Aliases:	...
Date of Birth:	14-Feb-90
CARIS ID:	1000127
Given Name:	Harold
Preferred Name:	Harry
Gender:	Male
Date of Death:	...

**Extended Demographics**

**Physical Characteristics**

**Address Book**

**Relationships** **Address Book** **Edit Client**

When you are in “**Client Context**”, you can change client details, but not case details.

1. The Case information space is empty.
2. The client's demographic details window is open.
3. The client's details may be edited.
4. A list of cases the client is involved in may be accessed.



At no time, can you view a list of either clients or cases other than your own.

## 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.

The screenshot shows the CARIS Case Summary page. Three numbered callouts are present:

- 1. Client is in context:** Points to the client name 'Harold Potter' and ID '(1000127)' in the top left header.
- 2. Case is in context:** Points to the case name 'Bifrost (13398)' and status 'Active' in the top right header.
- 3. Details of selected case:** Points to the 'Case Summary' table in the main workspace.

**Case Summary Table:**

Case Type:	Bifrost	Referral Date:	Aug-10-2006
Case Status:	Active	Accept/Reject Date:	Aug-10-2006
Case Id:	13398	Admission Date:	Aug-10-2006
Case Manager:	CARIS, TRAINING_01	Est. Discharge Date:	Aug-31-2006
Referral Source:	Child Protection	Discharge Date:	...
Referral Mode:	Fax	Case Close Date:	...
Phase Days:	2		
Require Care Plan:	No	Respite:	No
Forensics Referral:	No		
Client Designation:		Designation Date:	
MHA Status:	Voluntary	Admission Type:	Assessment
Bed Information:	...		
Waitlist Information:	...		

**Referral Note:**

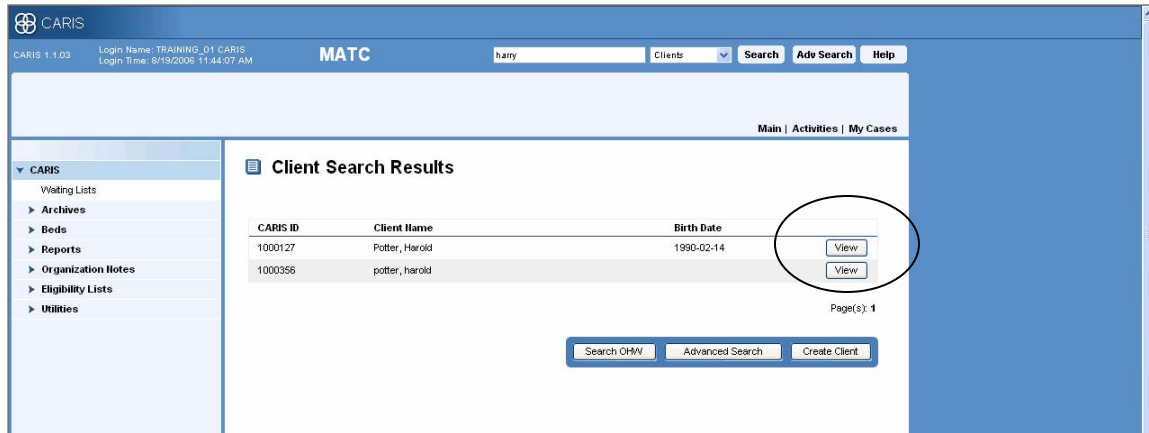
At the bottom of the page, there is a row of buttons: Reject Referral, Accept Referral, Cancel Case, Admit, Discharge, and Close Case.

1. The client's name appears in the client name area.
2. The name of the case appears in the case information space.
3. Details, including case type, appear in the work space.



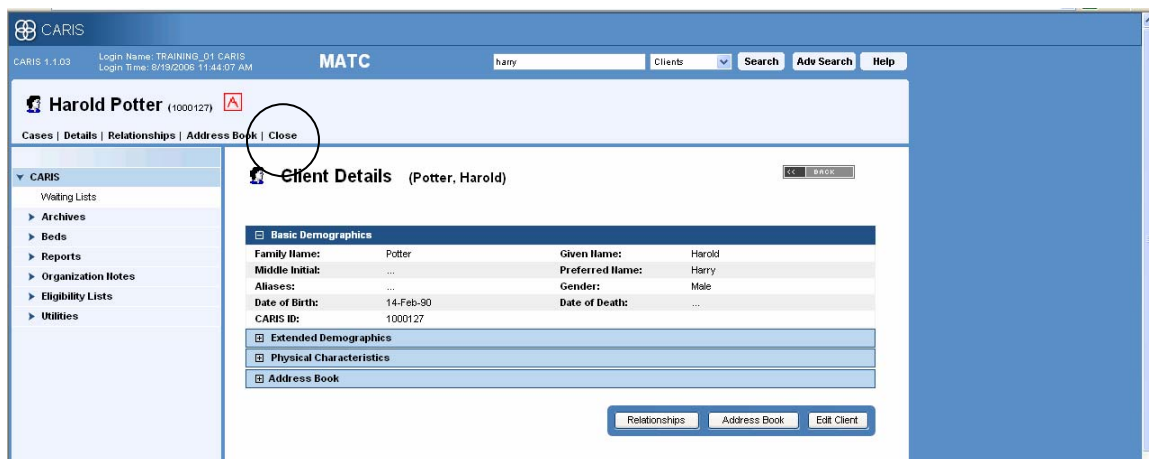
## Exercise 2

1. Log back on to CARIS as a MATC Power 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.



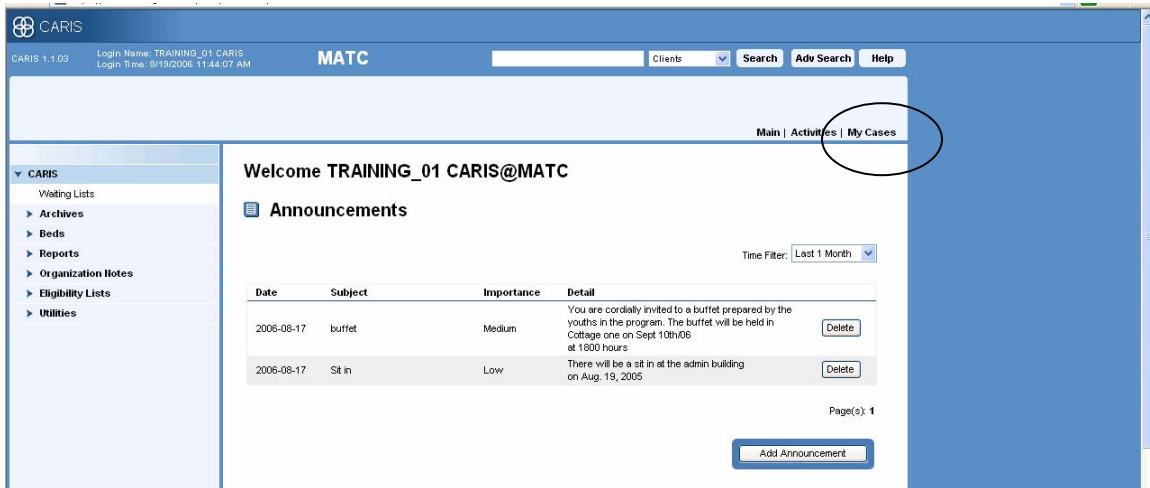
What context are you in now? \_\_\_\_\_

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?

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

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- (b) What are the CARIS context menu options?

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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

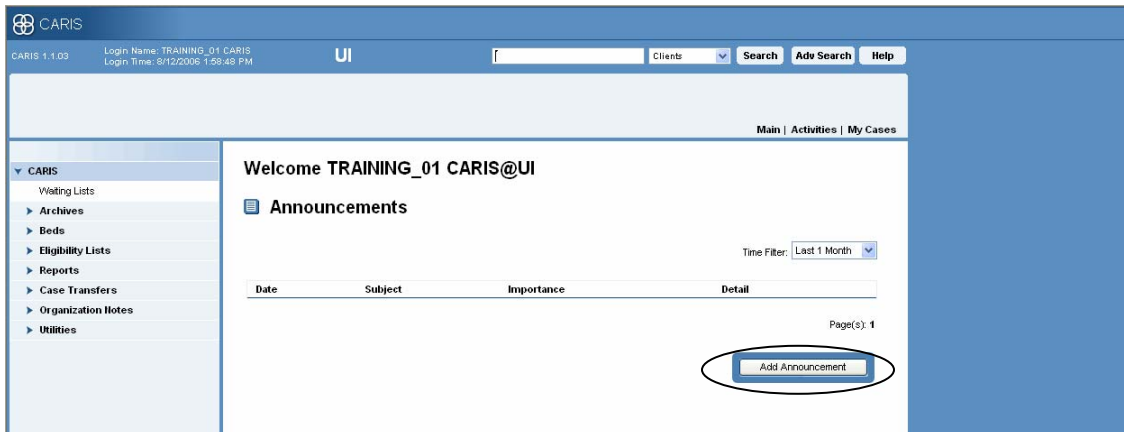
At the end of this module, participants will be able to:

1. Access Organizational Notes
2. Create and delete an Announcement
3. Create and edit a Communication Note
4. Create and edit a Safety Procedure
5. Create and edit a Topic-Based Consultation
6. Attach a file to an Organization Note

### Create an Announcement

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**.

The screenshot shows the 'Create Announcement' form within the CARIS application. The left sidebar contains a navigation menu with categories like 'CARIS', 'Waiting Lists', 'Archives', 'Beds', 'Reports', 'Referrals', 'Organization Notes', 'Eligibility Lists', 'Alerts', 'Admission and Discharge Forms', and 'Clinical Forms and Assessments'. The 'Organization Notes' category is expanded, showing sub-items: 'Announcement', 'Communication Notes', 'Safety Procedure', and 'Topic-Based Consultation'. The main form area is titled 'Create Announcement' and includes a '<< BACK' button. It contains the following fields: 'Date' (pre-filled with '2006-08-10'), 'Subject' (empty), 'Importance' (dropdown menu), and 'Announcement' (large text area). At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled in red.

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

The screenshot shows the 'Announcements' page in the CARIS system. The top navigation bar includes 'Main | Activities | My Cases'. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Welcome TRAINING\_01 CARIS@UI' and 'Announcements'. It features a 'Time Filter' dropdown set to 'Last 1 Month'. Below this is a table with the following data:

Date	Subject	Importance	Detail
2006-08-12	TestingAnnouncement	Low	New announcement.

At the bottom of the table, there is a 'Delete' button circled in red. Below the table, it says 'Page(s): 1' and there is an 'Add Announcement' button.

## Create Communication Notes (Function Provided for PSDHH)

To create communication notes:

1. Open Organization Notes in the Navigation Tree and then Communication Notes.
2. Click **Add Note**.

Cases | Details | Relationships | Address Book | Close      Summary | Participants | Case Plan | Case History | Close

**Communication Notes**

Time Filter: 4 Weeks

Date	Type	Method	Duration	Notes
2006-08-10	Advocacy	Fax	10 mins	<a href="#">Edit</a>
2006-08-08	Information	Mail/courier	25 mins	<a href="#">Edit</a>

Page(s): 1

[Add Note](#)

3. Select the “Type”, “Contact Method”, and “Duration” from the options in the drop-down boxes and type the text of the communication in the “Notes” field.
4. Click **Save**.

Address Book | Close      Summary | Participants | Case Plan | Case History | Close

**Communication Note**      << BACK

Date: 8/10/2006

Type:

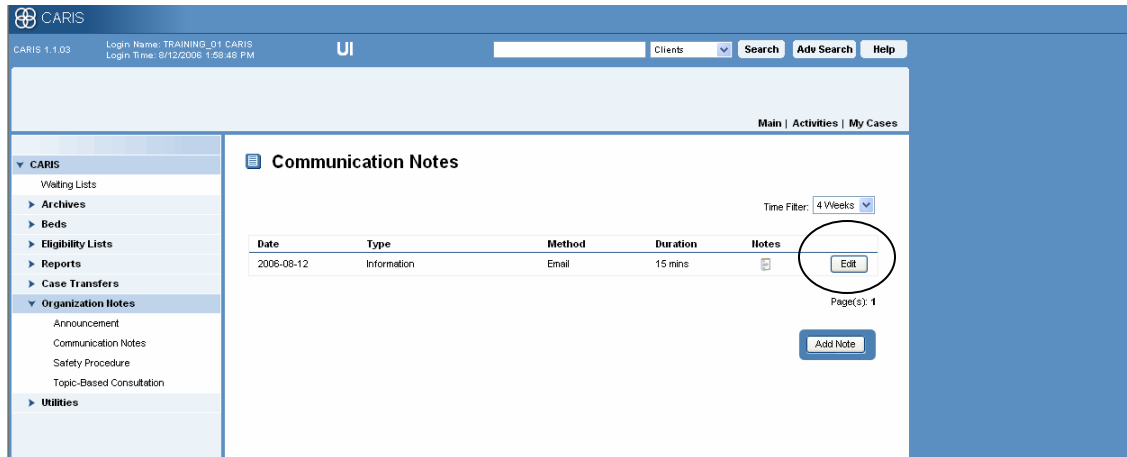
Contact Method:

Duration (minutes):

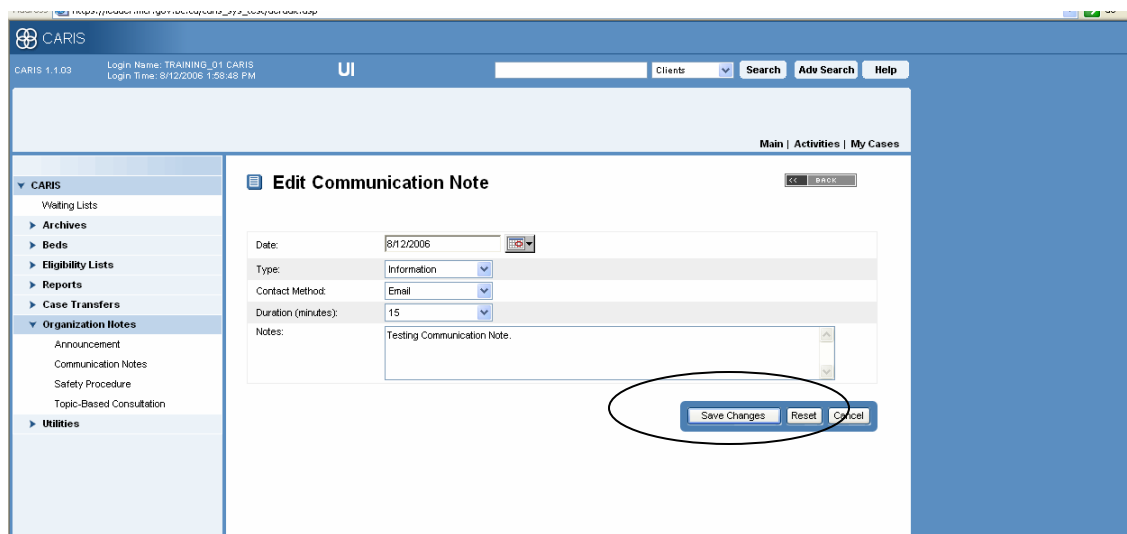
Notes:

[Save](#) [Cancel](#)

To edit the communication note, click **Edit**.



5. 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**).



Communication notes can be viewed by anyone within your location. Not to be used for client/case information.

## 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**.

The screenshot shows the CARIS web interface for creating a Safety Procedure. On the left is a navigation tree with categories like CARIS, Waiting Lists, Archives, Beds, Reports, Referrals, Organization Notes (selected), Eligibility Lists, Alerts, Admission and Discharge Forms, Clinical Forms and Assessments, Case Forms, and Utilities. Under Organization Notes, sub-items include Announcement, Communication Notes, Safety Procedure (selected), and Topic-Based Consultation. The main content area is titled 'Safety Procedure' and contains several fields: 'Date' (8/10/2006), 'Time of Procedure' (5:10 PM), 'Procedure Type' (a dropdown menu), and 'Notes' (a large text area). Below the Notes field is an 'Add Attachment' section with a text input, a 'Browse...' button, and 'Add' and 'Detach' buttons. At the bottom right are 'Submit' and 'Cancel' buttons. Two circles highlight the 'Browse...', 'Add', and 'Detach' buttons, and the 'Submit' button.



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

CARIS 1.1.03 Login Name: TRAINING\_01 CARIS Login Time: 8/12/2006 1:59:48 PM UI Clients Search Adv Search Help

Main | Activities | My Cases

**Activities Display**

Activity Filter: All Activities

**Safety Procedure (2006-08-12)** **Edit**

**Activity Detail**

Safety Procedure Type	Smoke Detectors
Notes	Testing safety procedure.

**Time Detail**

Date of Entry	2006-08-12 2:21 PM
Date of Activity	2006-08-12 2:15 PM

**Participant Detail**

Recording Person	CARIS, TRAINING_01
Organization	UI

**Activity History**

2006-08-12 2:24 PM - CARIS, TRAINING_01	
Notes	Testing safety procedure.

Page(s): 1

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**).

Address: https://leader.mcf.gov.bc.ca/caris\_sys\_test/default.asp

CARIS 1.1.03 Login Name: TRAINING\_01 CARIS Login Time: 8/12/2006 1:59:48 PM UI Clients Search Adv Search Help

Main | Activities | My Cases

**Update Safety Procedure** **CS BACK**

Date: 8/12/2006 Time of Procedure: 2:15 PM

Procedure Type: Smoke Detectors

Notes: Testing safety procedure.

Add Attachment: (Max file size: 20MB) Browse... Add Detach

**Save Changes Reset Cancel**



To change the start time, click the box with the three dots.

## Create a Topic Based Consultation

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 screenshot shows the 'Topic Based Consultation' form within the CARIS application. The left sidebar contains a navigation tree with 'Organization Notes' selected. The main form area has the following fields and controls:

- Topic:** A text input field.
- Consultation Type:** A dropdown menu.
- Mode:** A dropdown menu.
- Number of Participants:** A dropdown menu.
- Start Date:** A date picker showing 8/10/2006.
- Start Time:** A time picker showing 5:10 PM.
- End Date:** A date picker.
- Duration:** A dropdown menu.
- Facilitators:** A list box containing 'CARIS, TEST 1', 'CARIS, TRAINING\_01', and 'CARIS, TRAINING\_12'.
- Partners:** A text input field and a dropdown menu for 'Type', with 'Add' and 'Delete' buttons.
- Recipient:** A text input field and a dropdown menu for 'Organization Type', with 'Add' and 'Delete' buttons.
- Notes:** A large text area for notes.
- Add Attachment:** A text input field, a 'Browse...' button, and 'Add' and 'Detach' buttons.

At the bottom right, the 'Record Consultation' button is highlighted with a red circle, and a 'Cancel' button is also visible.

4. To edit the topic based consultation, click **Edit**.

The screenshot shows the 'Activities Display' page. On the left is a navigation menu with categories like CARIS, Archives, Beds, Eligibility Lists, Reports, Case Transfers, Organization Notes, and Utilities. The main content area is titled 'Activities Display' and includes an 'Activity Filter' dropdown set to 'All Activities'. Below this, a table lists activities. The first activity, 'Topic-Based consultation (2006-08-12)', has an 'Edit' button circled in red. The activity details are as follows:

<b>Activity Detail</b>	
Mode	Face-to-Face
Number of Participants	2
Consultation Duration	00:15
Consultation Type	Consultation
Consultation Topic	Testing Topic Based Consultation
Consultation Notes	Notes for topic-based consultation
<b>Time Detail</b>	
Date of Entry	2006-08-12 2:44 PM
Date of Activity	2006-08-12 2:35 PM
<b>Participant Detail</b>	
Recording Person	CARIS, TRAINING_01
Organization	UI
Facilitator	CARIS, TRAINING_01
<b>Consultation Recipient And Service Provider (2006-08-12)</b>	
<b>Topic Consultation: Other Org and Its Type (2006-08-12)</b>	

Page(s): 1

5. 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**).

The screenshot shows the 'Update Topic Based Consultation' page. The left navigation menu is the same as in the previous screenshot. The main content area is titled 'Update Topic Based Consultation' and includes a 'Back' button. The form contains the following fields:

- Topic: Testing Topic Based Consultation
- Consultation Type: Consultation
- Mode: Face-to-Face
- Number of Participants: 2
- Start Date: 8/12/2006
- End Date: (empty)
- Start Time: 2:35 PM
- Duration: 00:15
- Facilitators: CARIS, TRAINING\_01; MARCEAU, JASON
- Partners: (empty) Type: (empty) Add Delete
- Test Partner (Other): (empty)
- Recipient: (empty) Organization Type: (empty) Add Delete
- Test Recipient (Other): (empty)
- Notes: Notes for topic-based consultation

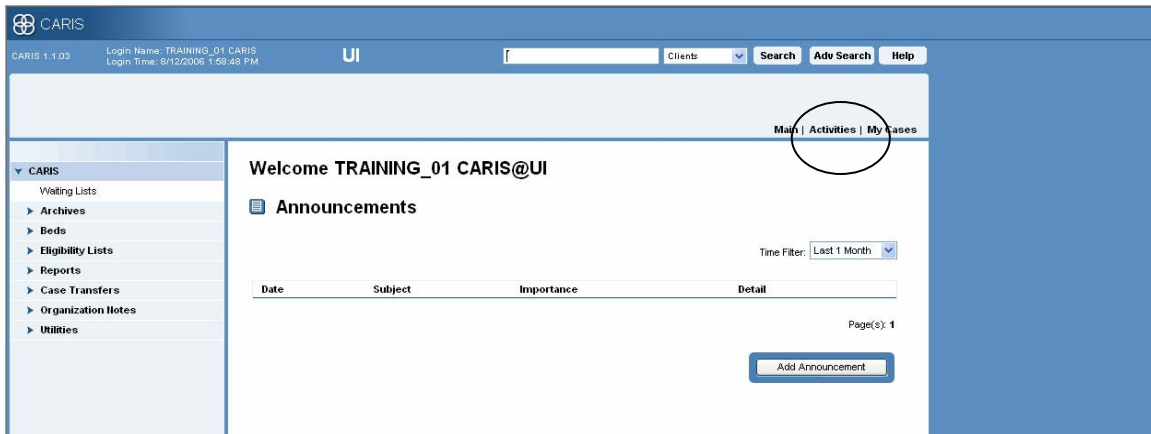
At the bottom right, the 'Save Changes', 'Reset', and 'Cancel' buttons are circled in red.



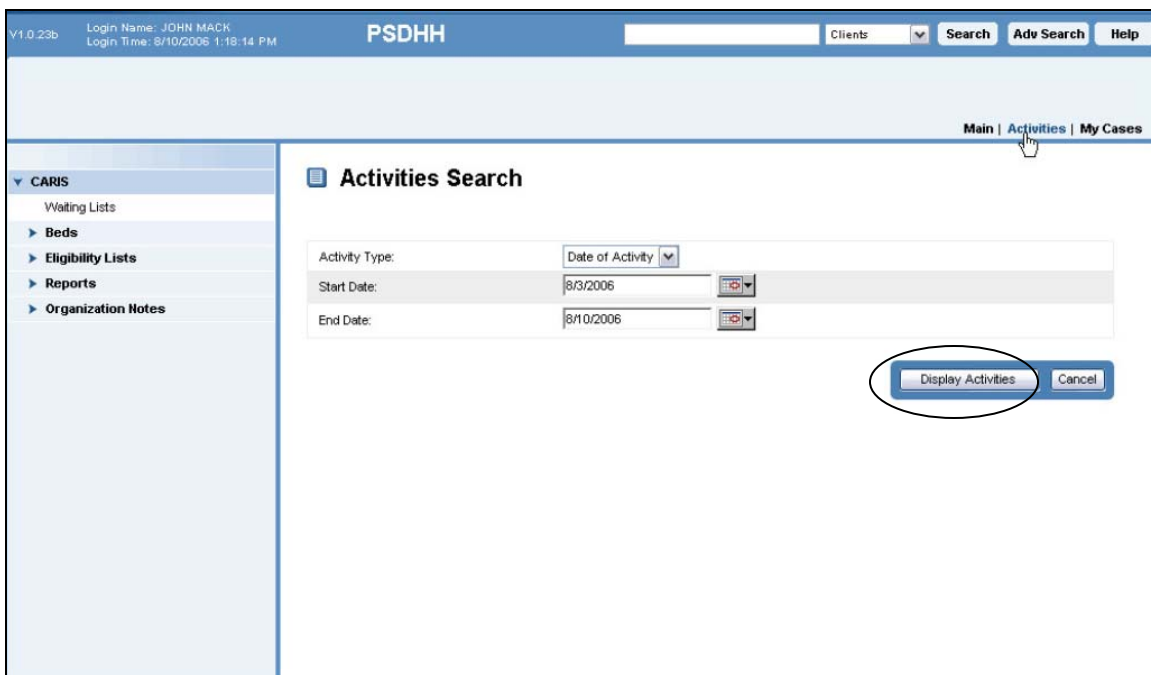
The name of the Facilitator must be selected for the consultation to be saved. Topic based consultations cannot be reported on or printed; they can only be viewed online.

## Search for an 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.

**Learning Checkpoint**

1. Name three types of Organization Notes:

---

2. Name three types of Safety Procedures:

---

3. Name three types of Topic Based Consultations:

---

4. Can Topic Based Consultations be printed or reported?

---

## Module 3: Creating a New Client

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

1. Search for a Client
2. Create a Client
3. Add basic information to a Client's record
4. Search the Online Healthware system for a client.
5. Copy or merge an OHW client into CARIS and activate the case.

### Create a New Client or Referral

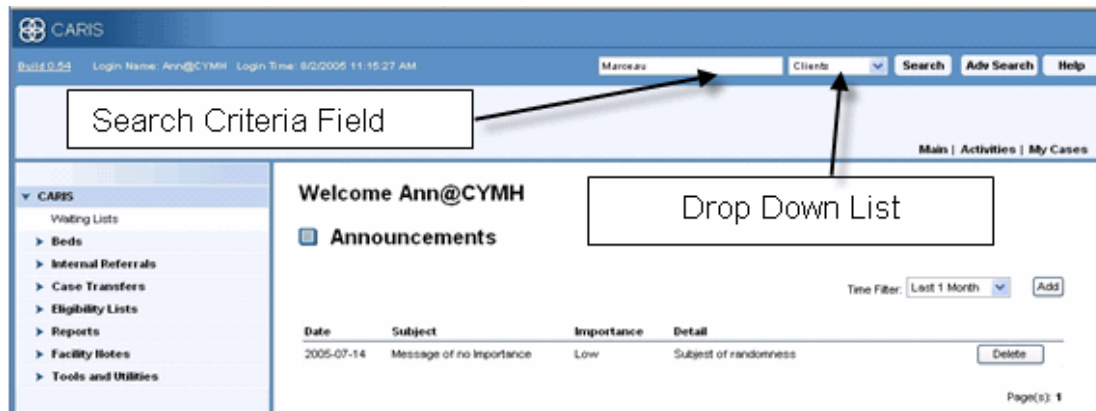
To avoid creating duplicate clients, you must first search for an existing client before creating a new one.

### Basic Search

The basic “Search” function is “inclusive” in that it will produce a list of all persons whose demographics contain all or part of the criteria entered in the field. The field requires as few as two letters to function. The more letters you enter, the narrower your search will be. For example: If you typed in “mal”, you would get a list that contained every “mal” in the database, such as “Malcombe” or “Maloof”.



If there are more than 45 people in the database who match the criteria, you will get a prompt that asks you to refine your criteria to reduce the range of possible responses. Searches can be performed at any time, regardless of who is in Context or what other function you are performing. However, you will leave the “window” you were in and lose any updates that have not been saved or entered. You may also find the person you are looking for under more than one category.



To conduct a basic search:

1. Enter a name or part of a name in the open field to the left of the **Search** button.
2. From the drop down list, ensure "Clients" is your selected search filter.
3. Click **Search**

A list of all persons in the database whose name(s) or demographics match the search criteria and fit the drop down search filter will display.

## Advanced Search

The Advanced Search is an "exclusive" search engine. This means that the results of the search will contain exactly what you typed in any of the fields in the Adv Search dialogue box. Consequently, the more fields that are filled in, the more narrow the resulting search will be.

To conduct an advanced search:

1. Enter a name or part of a name in the open field to the left of the **Search** button.
2. From the drop down list, by clicking the down arrow, select "Clients" "as your search filter
3. Click **Advanced Search**
4. Fill in as many fields (filters) as you can to narrow the search. For example, you may wish to search for a client by their CARIS ID here.



CARIS 1.1.08 Login Name: TRAINING\_05 CARIS Login Time: 9/6/2006 10:00:54 AM

NOC

harry Clients Search Adv Search Help

Main | Activities | My Cases

**Advanced Search: Client**

Fill in as many fields (filters) as you can to narrow the search

Clients | Contacts | Organizations

**Basic Demographics**

CARIS ID:

Family Name:  Given Name:

Middle Initial:  Preferred Name:

Aliases:  Gender:

Date of Birth:  Date of Death:

**Extended Demographics**

**Address Book Details**

Click on this + sign to see more filter options

Search

## Searching the Online Healthware System (OHW) and Copying into CARIS

You must also search the OHW database before creating a client, and if you can identify the OHW client as your new client (use the **View** option to confirm), you can copy the record into CARIS.

1. Perform a search and examine the list carefully (using View button)
2. Click **Search OHW**.

CARIS 1.1.08 Login Name: TRAINING\_05 CARIS Login Time: 9/6/2006 10:00:54 AM

NOC

jones Clients Search Adv Search Help

Main | Activities | My Cases

**Client Search Results**

CARIS ID	Client Name	Birth Date	
1000377	Jim, Jones		<a href="#">View</a>
1000134	Jones, Silvia		<a href="#">View</a>
1000274	Jones, Dean	1986-06-12	<a href="#">View</a>
1000528	Jones, Tonya Deborah	1988-04-01	<a href="#">View</a>
1000563	Jones, Lisa Marge	1956-04-15	<a href="#">View</a>

Page(s): 1

[Search OHW](#) [Advanced Search](#) [Create Client](#)

3. Fill in the fields of the “Search OHW Clients” form and click **Search**.

CARIS 1.1.08 Login Name: TRAINING\_05 CARIS Login Time: 9/6/2006 10:00:54 AM NOC

Search Clients Search Adv Search Help

Main | Activities | My Cases

**Search OHW Clients** << BACK

**Basic Demographics**

Family Name:  Given Name:

Gender:  Date of Birth:

**Search**

4. Click **View** for the appropriate client.

**OHW Client Search Results** << BACK

Synchronized	Client Id	Client Name	Date of Birth	
	000B000000020100	Jones, Carla Amy	1962-04-19	<a href="#">View</a>
	0011000000020100	Green, Amy Nancy	1974-07-16	<a href="#">View</a>
	0012000000020100	Jones, Bruce Larry	1981-04-03	<a href="#">View</a>
	010A000000020100	Jones, Ralph Larry	1954-08-06	<a href="#">View</a>
	0110000000020100	Jones, Henry Homer	1974-11-03	<a href="#">View</a>
	0113000000020100	Jones, Bruce Timothy	1984-02-03	<a href="#">View</a>
	011C000000020100	Jones, Brenda Martha	1988-04-05	<a href="#">View</a>
	0164000000020100	Jones, Gary Homer	1986-06-10	<a href="#">View</a>
	020B000000020100	Jones, Brian Peter	1960-11-29	<a href="#">View</a>
	0211000000020100	Black, Homer Thomas	1975-05-21	<a href="#">View</a>
YES	030A000000020100	Jones, Lisa Marge	1956-04-15	<a href="#">View</a>
	030E000000020100	Jones, Stewart Jason	1971-06-07	<a href="#">View</a>
	0360000000020100	Jones, Roberta	1984-02-10	<a href="#">View</a>
	0410000000020100	Jones, Mitchell Robert	1970-11-26	<a href="#">View</a>
	0413000000020100	Jones, Bill Homer	1982-05-25	<a href="#">View</a>

Page(s): 1 2 3 4 5 6 7

[Search Again](#) [Advanced Search](#) [Create Client](#)

Note: The Yes under “Synchronized” means the OHW record for this client has already been copied into CARIS.

- If the client does not exist in CARIS, you will be able to copy the client's OHW information into CARIS by clicking the **Copy OHW Client** button. When you click the **Copy OHW Client**, you will get the option to select the content you wish to copy into CARIS.

**OHW Client Record** (Jones, Bill Homer) BACK

**Basic Demographics**

Family Name:	Jones	Given Name:	Bill
Middle Initial:	Homer	Title:	...
Gender:	Male	Date of Birth:	1982-05-25
Client Status:	Active		

**Extended Demographics**

- Client Aliases
- Client Identifiers
- Client Addresses
- Associations
- Alerts
- Client Notes
- Archive Information

Merge OHW Client **Copy OHW Client** Cancel

The “Copy OHW Client” form appears.

**Copy OHW Client** BACK

**Basic Demographics**

OHW Label	OHW Value	CARIS Label	CARIS Value
Title:			
Family Name:	Jones	Family Name:	Jones
Given Name:	Bill	Given Name:	Bill
Middle Initial:	Homer	Middle Initial:	Homer
Gender:	Male	Gender:	Male
Date of Birth:	May -25 1982	Date of Birth:	May -25 1982

**Extended Demographics**

Reset Create Client Cancel



This icon indicates that other options for this field existed in OHW.

## Merging OHW Clients into Existing CARIS Clients and Activating the Active OHW Case

If you have a client in context and you find a record for this client in the OHW system, you can merge the two records by clicking **Merge OHW Client**.

1. From your list, search for the client in CARIS.
2. Bring the client into client context by clicking **View**. Write down the CARIS ID # on your list, if they exist.
3. Search for the client again in the search field at the top of your screen. Click **Search OHW**.
4. Click **View** next to the appropriate client in OHW.
5. If you click the + sign next to External Systems, click **View**, click the + sign next to Client Identifiers, and you will see the OHW # under the “text column”.

The screenshot displays the CARIS MATC interface. At the top, the header includes the CARIS logo, version 1.1.03, login information for TRAINING\_01, and the MATC title. A search bar contains the name 'Jones', and buttons for 'Search', 'Adv Search', and 'Help' are visible. Below the header, the user 'Jones Jim (1000377)' is selected, with tabs for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. A left sidebar lists various CARIS modules like 'Waiting Lists', 'Archives', 'Beds', 'Reports', 'Organization Notes', 'Eligibility Lists', and 'Utilities'. The main content area is titled 'OHW Client Record (Jones, Bruce Larry)' and features a 'BACK' button. It contains several expandable sections: 'Basic Demographics' (showing Family Name: Jones, Given Name: Bruce, Middle Initial: Larry, Title: ..., Gender: Male, Date of Birth: 1981-04-03, Client Status: Active), 'Extended Demographics', 'Client Aliases', 'Client Identifiers', 'Client Addresses', 'Associations', 'Alerts', 'Client Notes', and 'Archive Information'. At the bottom right, three buttons are present: 'Merge OHW Client' (circled), 'Copy OHW Client', and 'Cancel'.

6. If you decide to proceed with the merge, you will be given the opportunity to select the content you wish to merge. Select the content you wish to merge by clicking the appropriate radio boxes. You can choose from either column (for example, if the Given Name in OHW is Daniel and the Given Name in CARIS is "D", you would choose the radio box from OHW.)
7. Click **Merge Client**. (Reset will return the form to its original settings. Cancel will close the window.)



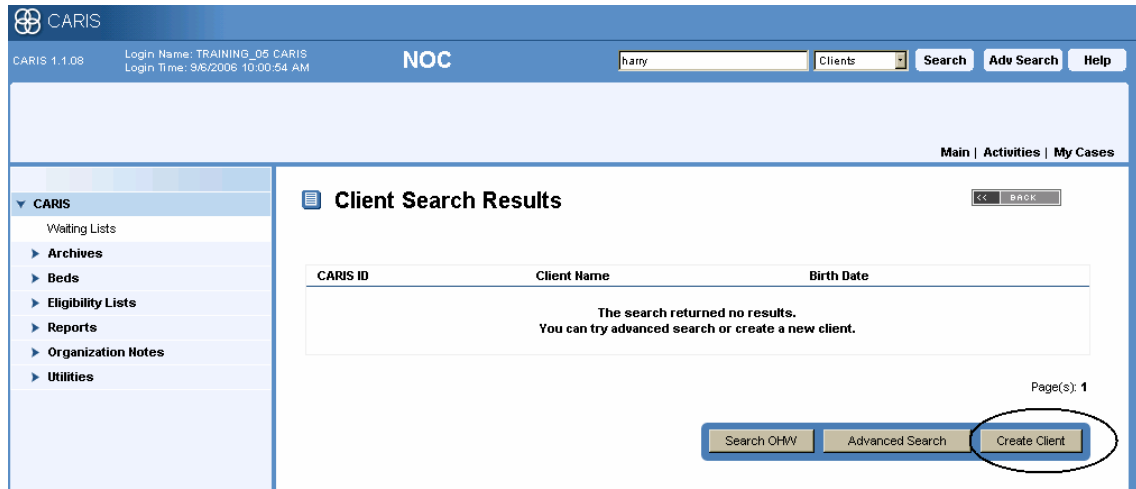
Merging the two records is not reversible. You cannot merge two of the same case types from OHW to CARIS.

8. Open Address Book for your client. You may have to create an address for this client or you will not be able to activate the case in CARIS.
9. To add an address, click **Add Address**. If you don't know the address yet, type "unknown" into the address fields.
10. Check Extended Demographics for Aboriginal Origin by opening Details. If the field is blank, click **Edit Client**. If you don't have this information, type "unknown". You can update address and extended demographic information later.
11. Now you can open Cases of your CARIS client. Click on the + sign to expand External Cases. Click on the + sign to expand External Systems. Click **Activate** next the case you wish to activate (NOTE: the case must be in your location).
12. In the "Activate Case" window, you will fill in the fields with the appropriate Case type and phase. The effective date = the accept date. In the "Notes" field, type "this case has been merged from OHW". Click **Activate Case**.

## Create a New Client

If you are unable to find a client in CARIS after a thorough search, you will create a client.

### 1) Click **Create Client**



The “Create Client” form will display.

CARIS 1.1.08 Login Name: TRAINING\_05 CARIS Login Time: 9/6/2006 10:00:54 AM NOC hary Clients Search Adv Search Help

Main | Activities | My Cases

**Create Client** << BACK

**Required fields - must be filled out**

**Basic Demographics**

Family Name:  Given Name:   
 Middle Initial:  Preferred Name:   
 Aliases:  Gender:   
 Date of Birth:  -  -

**Extended Demographics** **Physical Characteristics**

Click on + sign to add additional info.

Create Client Reset Cancel

- 1) Fill in the fields for “Basic Demographics”
- 2) Click on the + sign to open the “Extended Demographics” box.
- 3) Fill in as many fields as you can.
- 4) Click on the + sign to open the “Physical Characteristics” box.
- 5) Fill in as many fields as you can.
- 6) Click **Create Client**.
- 7) A dialogue box will display asking you if you want to create this client. Click **OK**.
- 8) You can exit this Client now by clicking Close in the Context Bar.

Once the client has been created, you can add address information and identify client/case relationships. The minimum information needed to create a client is: first name, last name, date of birth, and gender.



## Exercise

- The following characters may be clients on CARIS. Can you find them on CARIS? (Circle Yes or No).

a.	Princess Leia	Yes	No
b.	Han Solo	Yes	No
c.	Minnie Mouse	Yes	No
d.	Harry Potter	Yes	No
e.	Ginny Weasley	Yes	No

- You suspect Darth Vader may be the kidnapper of Princess Leia. You also know that “Darth Vader” is an alias.

a.	What is Princess Leia’s family name (maiden)?	
b.	What is Darth Vader’s real name (given and family name)?	
c.	What is his last known address?	

- Han Solo could also be searching for Princess Leia. What is his “Status in Canada”?

---

- Create a client on CARIS based on a fictional character.

You can use this client information (or something you make up): Any fictional character’s first and last name; born Aug 22/1996; male. Also make sure you fill in all of the fields of the “extended demographics” screen, even if you select “Unknown”.

Write you fictional client’s name here:\_\_\_\_\_

- Search the OHW system for a “White”, “Black”, or “Green” client that has not been synchronized and create a CARIS client with the information.

**Learning Checkpoint**

1. What must you do first when creating a new client?  
\_\_\_\_\_
2. What is the minimum information required to create a new client?  
\_\_\_\_\_  
\_\_\_\_\_
3. What two options do you have for bringing client information from the Online Healthware system into CARIS?  
\_\_\_\_\_  
\_\_\_\_\_

## Module 4: 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

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 screenshot shows the CARIS MATC interface. The top navigation bar includes the CARIS logo, login information (CARIS 1.1.03, Login Name: TRAINING\_01 CARIS, Login Time: 8/19/2006 12:08:33 PM), and the MATC title. A search bar with 'skyw' and a dropdown menu set to 'Clients' is present. Below the navigation bar, the 'Client Details' window for 'Luke Skywalker (1000314)' is open. The window has tabs for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. The 'Details' tab is active, showing a table of client information. The table has columns for 'Basic Demographics', 'Extended Demographics', 'Physical Characteristics', and 'Address Book'. The 'Basic Demographics' section is expanded, showing fields for Family Name, Middle Initial, Aliases, Date of Birth, CARIS ID, Given Name, Preferred Name, Gender, and Date of Death. The 'Extended Demographics', 'Physical Characteristics', and 'Address Book' sections are collapsed. At the bottom right of the window, there are three buttons: 'Relationships', 'Address Book', and 'Edit Client'.

Basic Demographics			
Family Name:	Skywalker	Given Name:	Luke
Middle Initial:	...	Preferred Name:	Luke
Aliases:	...	Gender:	Male
Date of Birth:	23-Jan-98	Date of Death:	...
CARIS ID:	1000314		

Extended Demographics			
...			

Physical Characteristics			
...			

Address Book			
...			

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.

**Edit Client (Skywalker, Luke)** ← BACK

Update fields as required

**Basic Demographics**

Family Name: Skywalker Given Name: Luke

Middle Initial: Preferred Name:

Aliases: Gender: Male

Date of Birth: January 23 1988 Date of Death:

**Extended Demographics**

**Physical Characteristics**

Click + sign to enter more info.

Save Changes Reset Cancel

## 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.



## 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.

## 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

The screenshot shows the CARIS web application interface. At the top, the header includes the CARIS logo, version 0.57, login information for 'Ann@PSDHH', and a search bar with 'ma' entered. Below the header, the user's name 'Jason Marceau' is displayed. A navigation menu on the left lists various options: CARIS, Waiting Lists, Beds, Eligibility Lists, Reports, Facility Notes, and Alerts. The main content area is titled 'Relationships (Marceau, Jason)' and contains a table with columns: Person, Type, Relation, Start Date, End Date, and IIts. A single row is visible with the data: Dean, Steve; Family; Cousin; 2005-07-12. An 'Edit' button is next to the row. Below the table, it says 'Page(s): 1' and there is a 'New Relation' button.

If the person is not already on the list,

2. Click **New Relation**

A Search window will display.

This screenshot shows the same CARIS interface as the previous one, but with a 'Person Search' dialog box open in the foreground. The dialog box has a 'Search Criteria' field containing the text 'Michael'. At the bottom of the dialog are 'Search' and 'Cancel' buttons. The background shows the 'Relationships' table with the same data as before, and the 'New Relation' button is still visible.

3. Enter the person's name

4. Click **Search**

**Jason Marceau**

Cases | Details | Relationships | Address Book | Close

**Relationships (Marceau, Jason)**

Person	Type	Relation	Start Date	End Date	IIS
Dean, Steve	Family	Cousin	2005-07-12		

**Person Search**

Search Criteria: Michael

Search Cancel Relate

Name	Birth Date	
Duncan, Michael	1990-01-31	Relate
Farrington, Michael	1936-03-10	Relate

Page(s): 1

Create Contact

5. Select the appropriate person from the search results and click **Relate**.
6. 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.
7. Click **Save Relationship**.

**Betty Boop** (1000324)

Cases | Details | Relationships | Address Book | Close

**Relationships (Boop, Betty)**

Person	Type	Relation	Start Date	End Date	IIS
--------	------	----------	------------	----------	-----

**Relationship**

Relationship Type: [Dropdown]

"Drop, Lemon" is the [Dropdown] of "Boop, Betty"

Start Date: 2006-08-13

End Date: [Dropdown]

Notes: [Text Area]

Save Relationship Cancel

**Relationships (Marceau, Jason)**

Person	Type	Relation	Start Date	End Date	Its
Dean, Steve	Family	Cousin	2005-07-13		<a href="#">Edit</a>

**Person Search**

Search Criteria:

[Search](#) [Cancel](#) [Relation](#)

Name	Birth Date	
Duncan, Michael	1990-01-31	<a href="#">Relate</a>
Farrington, Michael	1936-03-10	<a href="#">Relate</a>

[Create Contact](#)

9. 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.

**Create Contact**

Family Name:  Given Name:

Preferred Name:  Aliases:

Date of Birth: -- Gender:

Date of Death:

[Reset](#) [Create Contact](#) [Cancel](#)

10. Click **Relate to Client** to add the relationship information.

**Contact Details (Voldmort, Evil Wizard)**

**General**

Family Name: Voldmort Given Name: Evil Wizard

Preferred Name: Evil Wizard Aliases: ...

Date of Birth: 01-Jan-00 Gender: Male

Date of Death: ...

**Address Book**

[Add to Case](#) [Relate to Client](#) [Relationships](#) [Address Book](#) [Edit Contact](#)



11. 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**.

**Create Relationship**

Relationship Type:

Relationship: "Granger, Hermione" is the/a  of "Harold Potter"

Start Date:  End Date:

Notes:

**Create Relationship** **Cancel**

The “Relationships” window will now include the new relationship.

**Jason Marceau**

Cases | Details | Relationships | Address Book | Close

**Relationships (Marceau, Jason)**

Person	Type	Relation	Start Date	End Date	IIts
Dean, Steve	Family	Cousin	2005-07-12		<input type="button" value="Edit"/>
Farrington, Michael	Social	Friend	2005-08-26		<input type="button" value="Edit"/>

Page(s): 1

**New Relation**



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**

**CARIS**  
Build 4.0.57 Login Name: Ann@PSDHH Login Time: 9/12/2005 2:39:51 PM

**Michael Farrington**

Cases | Details | Relationships | Address Book | Close

**Relationships (Farrington, Michael)**

Person	Type	Relation	Start Date	End Date	Nts
Farrington, Steve	Family	Brother	2005-08-30		
Reginald, David	Family	Brother	04/2005		
Marceau, Jason					

Relationship Type: Family of "Farrington, Michael"

Start Date: 04/2005

End Date:

Notes:

Page(s): 1

Save Relationship Cancel

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

**CARIS**  
Build 4.0.57 Login Name: Ann@PSDHH Login Time: 9/12/2005 2:39:51 PM

**Harold Potter (1000127)**

Cases | Details | Relationships | Address Book | Close

**Relationships (Potter, Harold)**

Person	Type	Relation	Start Date	End Date	Nts
Dursley, Dudley	Family	Cousin	2006-02-26		
Dursley, Petunia					
Dursley, Vernon					
Dean, James					
Granger, Hermione	Social	Friend	2006-09-06	2006-09-06	
Voldemort, Evil W.					
Weasley, Ron					

Relationship Type: Social of "Potter, Harold"

Start Date: 2006-09-06

End Date: 2006-09-06

Notes: Harry and Hermione had a fight

Page(s): 1

Save Relationship Cancel

End a relationship by entering today's date

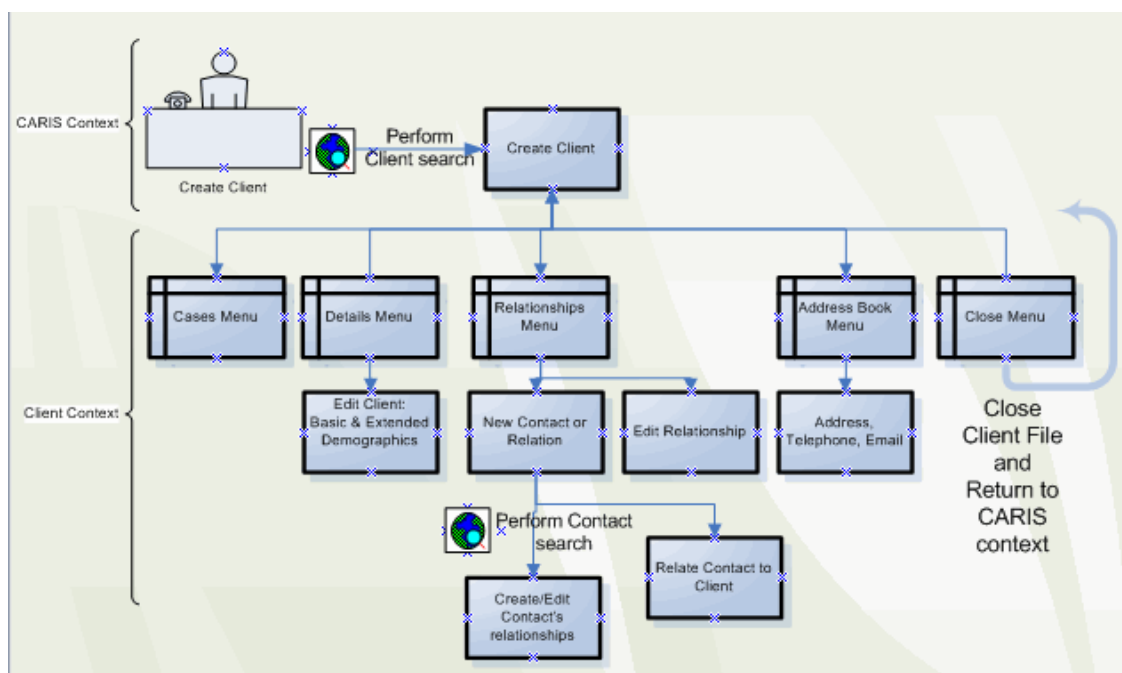


The only fields you can change are the end date and the notes. Once a relationship has been saved, you cannot change the relationship type. If you wish to change the type,

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 it 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, Add Person or Del.** Save changes.

The screenshot shows the CARIS Address Book interface for Luke Skywalker (1000314). The interface includes a sidebar with navigation options like CARIS, Waiting Lists, Archives, Beds, Eligibility Lists, Reports, Organization Notes, and Utilities. The main content area displays the Address Book with a table of addresses and a filter section.

**Annotations:**

- Add new address, telephone, or email info.** Points to the "Add Address", "Add Telecom", and "Add Email" buttons.
- Use this filter to display only addresses, phone, or email OR all types.** Points to the "Type Filter" dropdown menu.
- Edit address, delete address, or add another person who resides at the address** Points to the "Edit", "Add Person", and "Del" buttons.
- Address expanded for editing** Points to the expand/collapse icon next to an address.
- Change Usage** Points to the "Usage" dropdown menu.

Address Details	Person	Use	Start Date	End Date	Note
Address: 420 - Ca					
Address: 101 Ret					
Address: 01 - 1234 death st., death star, BC, V8M0N7, CA Loc: 01 - 1234 death st., death star BC V8M0N7 CA	Skywalker, Snakin	Home Address	2006-09-01		
Address: 1st Alley, Whalley, BC, V2V3X3, CA					
Address: 456 Pender St, Vancouver, BC, V5R2B7, CA					
Address: 1 Meteorite, Marsville, BC, L2L2L2, CA					

**Address**

Status:

Street:  Apt./Suite #:

City:

Province:  Postal Code:

Country:

Address Notes:

**Directions notes will display first without opening an address (+)**

**Relate person to Address**

Address: 123 4th Ave, Vancouver, BC, V0V0V0, CA

Person:

Usage:

Start Date:   End Date:

Usage Notes:

**Usage notes - when does the contact live here?**



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.

### 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:

---

3. Name 3 possible relationships that a client might have on file:

---

---

---

## Module 5: Creating Cases

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

1. List the 4 phases of client service
2. Create a case
3. Accept or Reject a Referral.
4. Admit a client.
5. Discharge a client.

“Case” and “referral” are used interchangeably in CARIS.



### The 4 Phases of Client Service

There are 4 phases of client service (referral, pre-admit, active, and follow-up phase) and each of these phases is modelled in CARIS.

#### 1. Referral Phase (intake)

During this phase you might continue to prepare the paperwork, wait for the client to decide to work with you, investigate the client's suitability for a program, conduct an admission interview, or decide against intake. In CARIS, you might create a client or you might wait for confirmation before creating the client.

#### 2. Pre-admit Phase (waiting list for service)

During this phase, you might place the client on a waiting list or cancel the case. In CARIS, you would create a case, accept the case, and add the client to the Wait List.

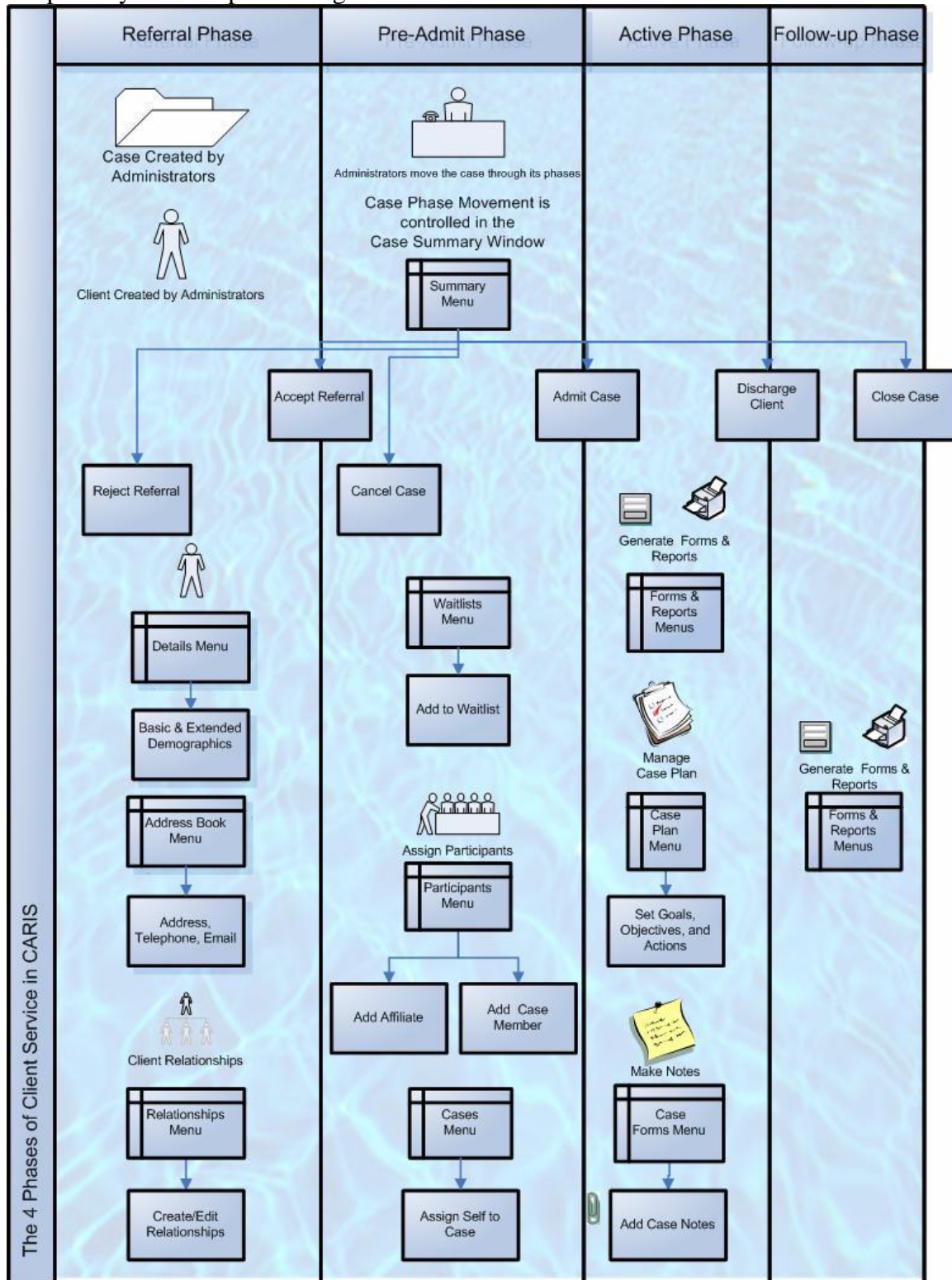
#### 3. Active Phase (Admit)

Once you admit a client, the client is now receiving services, and you are documenting services. In CARIS, you would admit the client and update the case notes.

#### 4. Follow up Phase (Discharge)

The client is discharged as the clinician and client conclude active services are no longer needed and the case is closed. In CARIS you would discharge the client and close the case once all of the documentation had been received.

Graphically the four phases might look like this:

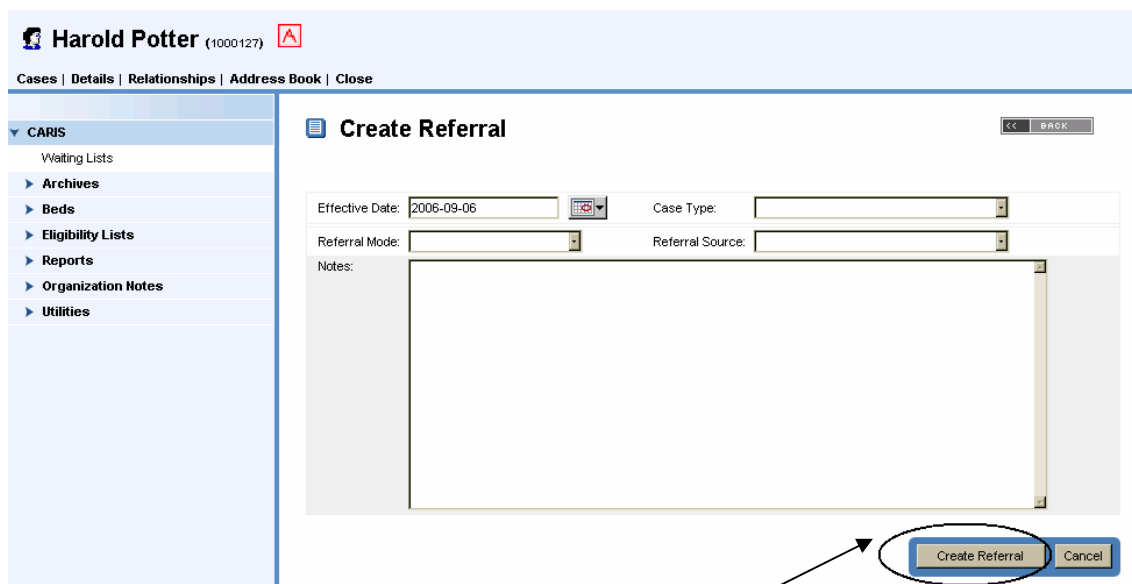
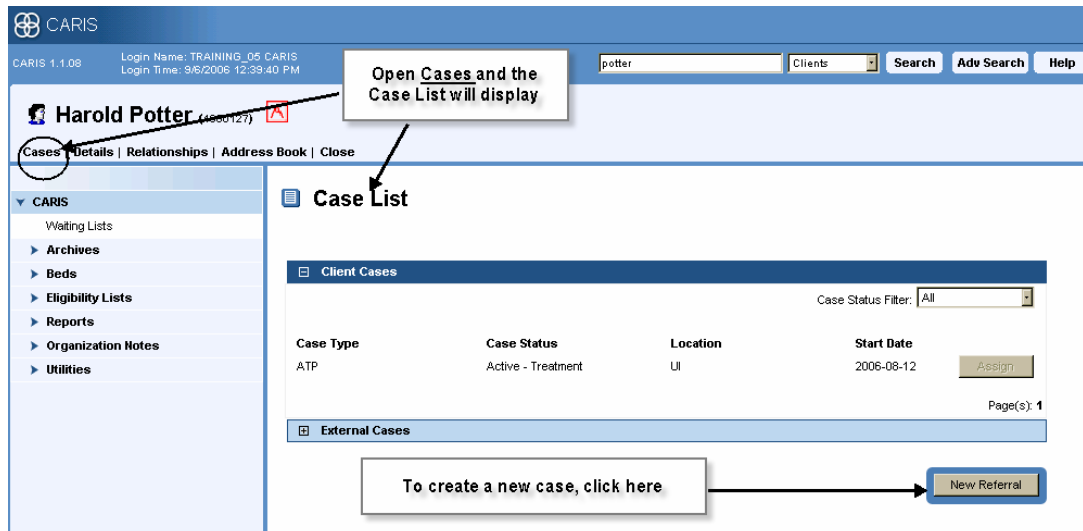




## Create a New Case

To create a new case:

1. Bring the Client into context
2. Open Cases. The “Case List” will display.
3. Click **New Referral** to start the process of creating a case.

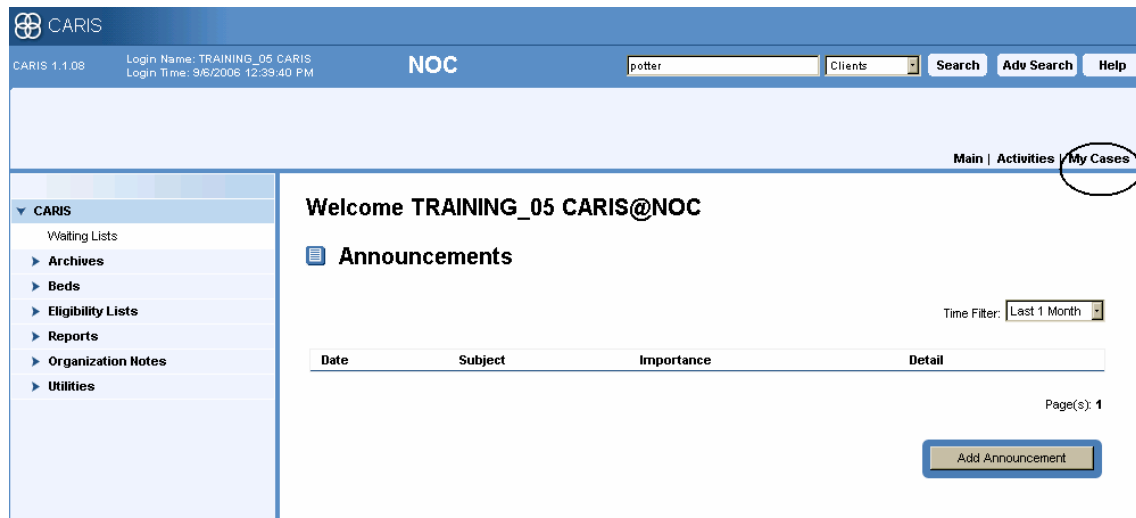


The “Create Referral” window that appears contains a series of fields. The effective date (which defaults to today’s date) must be entered, and a selection from each of the drop down lists must also be made. The “Notes” field is optional.

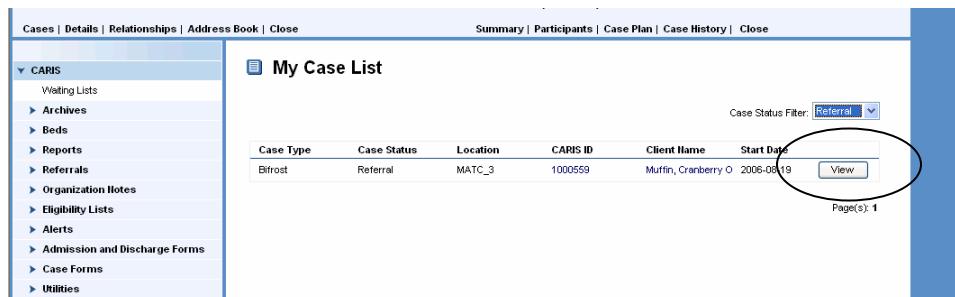
4. Click **Create Referral**

## Accept a Referral

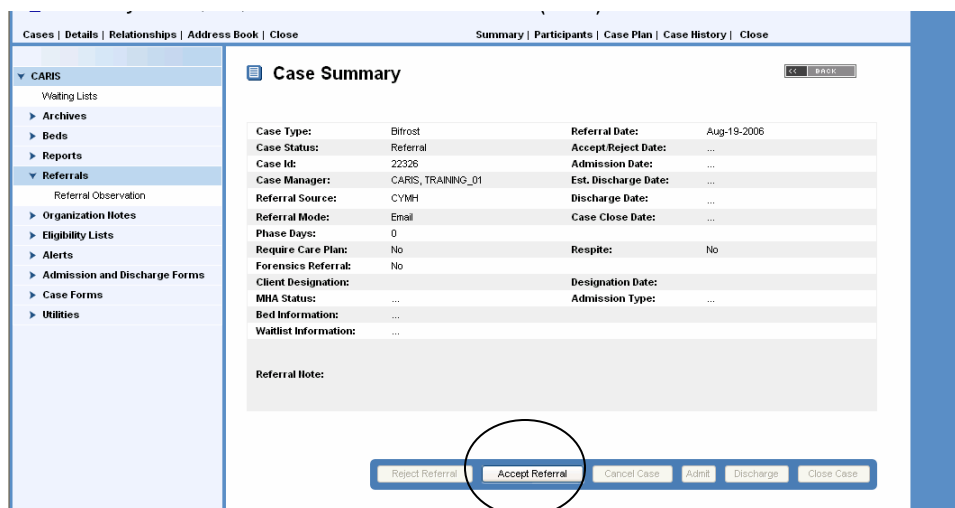
1. Click on My Cases in CARIS context.



2. Click **View** for the case in the Referral phase of client service.



3. Click **Accept Referral** to accept the case.



Once the proper forms have been processed, clicking the **Accept Referral** button will give you the option to accept the case.

Accept Referral

Effective Date: 2006-08-19

Accept Referral Cancel

Accepting the case changes the phase of client service to Pre-Admit.

If you choose **Reject Referral**, you will be asked for a “Rejection” category and a “Rejection Reason”.

Reject Referral

Effective Date: 2006-08-09

Rejection Category: Rejection Reason:

Notes:

Reject Referral Cancel

## Admit a Client

1. Click on My Cases in CARIS context.
2. Click **View** for a case in the Pre-Admit phase of client service.

My Case List

Case Status Filter: Pre-Admit

Case Type	Case Status	Location	CARIS ID	Client Name	Start Date
Bifrost	Pre-Admit	MATC_3	1000314	Skywalker, Luke	2006-08-19
Bifrost	Pre-Admit	MATC_3	1000559	Muffin, Cranberry O	2006-08-19

View this case, Page 1 of 1

### 3. Click **Admit**.

**Cranberry Muffin** (1000559) **Bifrost (22326) Pre-Admit**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Case Summary**

Case Type:	Bifrost	Referral Date:	Aug-19-2006
Case Status:	Pre-Admit	Accept/Reject Date:	Aug-19-2006
Case Id:	22326	Admission Date:	...
Case Manager:	CARIS, TRAINING_01	Est. Discharge Date:	...
Referral Source:	CYMH	Discharge Date:	...
Referral Mode:	Email	Case Close Date:	...
Phase Days:	0		
Require Care Plan:	No	Respite:	No
Forensics Referral:	No		
Client Designation:		Designation Date:	
MHA Status:	...	Admission Type:	...
Bed Information:	...		
Waitlist Information:	...		

Referral Note:

Reject Referral Accept Referral Cancel Case **Admit** Discharge Close Case

If all of the required client demographic information has not been collected, you may receive an error message such as the one displayed here. Clicking on the error message will take you to the client demographics for entry.

#### **Error: Missing Criteria or Integrity Check(s) Failed**

##### Missing Criteria

Type	Element	
Party Details	Aboriginal Origin	MISSING
Party Details	Ethno-cultural Background	OK
Party Details	Guardianship Status	OK
Party Details	PHN	OK
Party Details	Birth Date	OK
Locations	Postal Code	MISSING
Locations	Address	MISSING

Click the words to  
make changes

1. Select "Admission Type" from the list in the drop down box and use the calendar to select an "Est Discharge Date".
2. Click Admit.

CARIS 1.103 Login Name: TRAINING\_01 CARIS Login Time: 8/13/2006 1:15:14 PM

**MATC** wood Members Search Adv Search Help

**Betty Boop (1000324) Bifrost (14917) Pre-Admit**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Admission Detail** << BACK

Effective Date: 2006-08-13 15:15

Admission Type: [dropdown]

MHA Status: [dropdown]

Est Discharge Date: [calendar]

Admit Cancel

Admitting the case changes the phase of client service Active.

## Discharge a Client

When you discharge a client, you effectively cease to work with the client on this case (discharge from active service), but the case remains open and will appear on the client's Case List, until you close the case. This is the Follow-Up Phase of client service.

To discharge a client,

1. Bring the Case into context
2. Open Cases and then click **View** for the appropriate case
3. Click **Discharge**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Case Summary**

Case Type:	Bifrost	Referral Date:	Aug-11-2006
Case Status:	Active	Accept/Reject Date:	Aug-11-2006
Case Id:	13568	Admission Date:	Aug-11-2006
Case Manager:	CARIS, TRAINING_01	Est. Discharge Date:	Aug-31-2006
Referral Source:	School District	Discharge Date:	...
Referral Mode:	Email	Case Close Date:	...
Phase Days:	0		
Require Care Plan:	No	Respite:	No
Forensics Referral:	No		
Client Designation:		Designation Date:	
MHA Status:	Voluntary	Admission Type:	Treatment
Bed Information:	...		
Waitlist Information:	...		

Referral Note:

Reject Referral Accept Referral Cancel Case Admit **Discharge** Close Case

4. Fill in the appropriate fields
5. Click **Save**

**Harold Potter** (1000127)

**Bifrost (13398) Active**

Cases | Details | Relationships | Address Book | Close      Summary | Participants | Case Plan | Case History | Close

**Discharge Form**

Discharge Date: N/A

Reason:

Responsible Agent:

Discharge Note:

Summary of Services Received:

Post-Service Recommendations:

The “Case Summary” window will display showing the discharge date.



The discharge date is created by clicking the **Discharge** button.

**Case Summary**

Case Type:	Bitrost	Referral Date:	Aug-11-2006
Case Status:	Follow-up	Accept/Reject Date:	Aug-11-2006
Case Id:	13704	Admission Date:	Aug-11-2006
Case Manager:	CARIS, TRAINING_01	Est. Discharge Date:	
Referral Source:	School	Discharge Date:	Aug-13-2006 11:29 AM
Referral Mode:	Mail/Courier	Case Close Date:	...
Phase Days:	0		
Require Care Plan:	No	Respite:	No
Forensics Referral:	No		
Client Designation:		Designation Date:	
MHA Status:	Involuntary	Admission Type:	Assessment
Bed Information:	...		
Waitlist Information:	...		

Referral Note:

## Close a Case

Closing a case means that you will no longer be working with the client on this particular case, nor will any of the case affiliates or members. The Case will be closed and will no longer appear on the client's "Case List" of active cases. You will be able to view the case by selecting the "Closed" filter in the client's "Case List".

1. Bring the Case into context
2. Open Cases and then click **View** for the appropriate case
3. Click **Close Case**

The screenshot shows the 'Case Summary' page for a client named 'Lemon Drop'. The left sidebar contains a navigation menu with options like 'Waiting Lists', 'Archives', 'Beds', 'Reports', 'Referrals', 'Organization Notes', 'Eligibility Lists', 'Alerts', 'Admission and Discharge Forms', 'Clinical Forms and Assessments', 'Case Forms', and 'Utilities'. The main content area displays case details in a table format:

Case Type:	Bitrost	Referral Date:	Aug-11-2006
Case Status:	Follow-up	Accept/Reject Date:	Aug-11-2006
Case Id:	13704	Admission Date:	Aug-11-2006
Case Manager:	CARIS, TRAINING_01	Est. Discharge Date:	
Referral Source:	School	Discharge Date:	Aug-13-2006 11:29 AM
Referral Mode:	Mail/Courier	Case Close Date:	---
Phase Days:	0		
Require Care Plan:	No	Respite:	No
Forensics Referral:	No		
Client Designation:	Involuntary	Designation Date:	
MIA Status:	---	Admission Type:	Assessment
Bed Information:	---		
Waitlist Information:	---		

Below the table is a 'Referral Note' section. At the bottom of the page, there is a row of buttons: 'Reject Referral', 'Accept Referral', 'Cancel Case', 'Admit', 'Discharge', and 'Close Case'. The 'Close Case' button is circled in the original image.

Note that "closing a case" is not the same as "closing a client". "Closing a Client" returns you to CARIS context. "Close Case" is a point of action in CARIS which moves the case from Follow-up Phase (see Appendices – 4 Phases of Client Service). "Case Closed" in a business context means that the case is closed.

The screenshot shows the 'Close Case' dialog box within the CARIS interface. The top header bar includes the CARIS logo, version '1.1.02', login information for 'TRAINING\_01 CARIS', and the MATC logo. The main content area shows the client 'Lemon Drop (1000320)' and the case 'Bifrost (13568) Follow-up'. The left sidebar is the same as in the previous screenshot. The 'Close Case' dialog box has the following fields:

- Effective Date:** 2006-08-11 (with a calendar icon)
- Case Close Status:** Closed (with a dropdown arrow)

At the bottom right of the dialog box are two buttons: 'Close Case' and 'Cancel'.

4. The “Close Case” window will display.
5. Select the effective date for closing the case
6. Select a “Case Close Status” from the list in the drop down box
7. Click **Close Case**

The “Case Summary” will display with the date and reason shown and no other options available. The Case is closed and no further information can be added to the case. Note the “Read Only” status in the context bar.

Case Type:	Response Residential	Referral Date:	Sep-14-2006
Case Status:	Closed	Accept/Reject Date:	Sep-14-2006
Case Id:	34306	Admission Date:	Sep-14-2006
Case Manager:	MCPHEE, IVAN	Est. Discharge Date:	Sep-14-2006 5:32 PM
Referral Source:	Adult Mental Health	Discharge Date:	Sep-14-2006 5:32 PM
Referral Mode:	Fax	Case Close Date:	Sep-14-2006
Phase Days:	4		
Require Care Plan:	No	Respite:	No
Forensics Referral:	No		
Client Designation:	Involuntary	Designation Date:	Treatment
MHA Status:	Involuntary	Admission Type:	Treatment
Bed Information:	...		
Waitlist Information:	...		
Referral Note:			





If the case is in the referral phase, the available options are to **Reject Referral** or **Accept Referral**; in the pre-admit phase, to **Admit** or **Cancel**; in the active phase, to **Discharge**; in the discharged phase, to **Close**.

To move a case through the phases, you must be on the Case Summary.

Cases are cancelled for organizational or client reasons. *Case created in error* is an example of an organizational reason; *moved, non-compliant* are examples of client reasons.

Rejected referrals do not appear on the client case list.

## Exercise 1

1. For the client you created in a previous module, create a referral and reject the referral.
2. For this same client, create a second referral, accept the referral, and cancel the case.
3. For this same client, create a referral, accept the referral, admit the client, discharge the client, and close the case.
4. For this same client, create a referral, accept the referral, and admit the client.

## Learning Checkpoint

1. Knowing what phase your clients are in is essential in CARIS. For each of the following questions, check the phase which applies:

	<b>Referral Phase</b>	<b>Pre-Admit Phase</b>	<b>Active Phase</b>	<b>Follow-up Phase</b>
You decide not to accept the referral.				
You are adding a progress note to the file.				
You have discharged the client.				
You have decided to admit the client.				

## Module 6: Manage Waitlists

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

1. Add a Client to a waitlist for service
2. Admit a client or cancel a case

Waiting lists in CARIS are used as a way of prioritizing clients for program services. Waiting Lists can be quickly viewed in CARIS context by clicking Waiting Lists in the Navigation Tree. In this view, you can edit waitlist notes or change the priority for a client by clicking **View**.

**Waiting Lists Summary**

Name	View
Waiting List (Bifrost)	View
Waiting List (Careplan Consultants)	View
Waiting List (Community Outreach)	View
Waiting List (Crossroads Non-Residential)	View
Waiting List (Crossroads Residential)	View
Waiting List (Dala Residential)	View
Waiting List (Dala Non-Residential)	View
Waiting List (Response Community)	View
Waiting List (Response Residential)	View
Waiting List (Response Non-Residential)	View

Page(s): 1

**Waiting List**

Priority: 1

Full Name: Boop, Betty B. Case Number: 14646

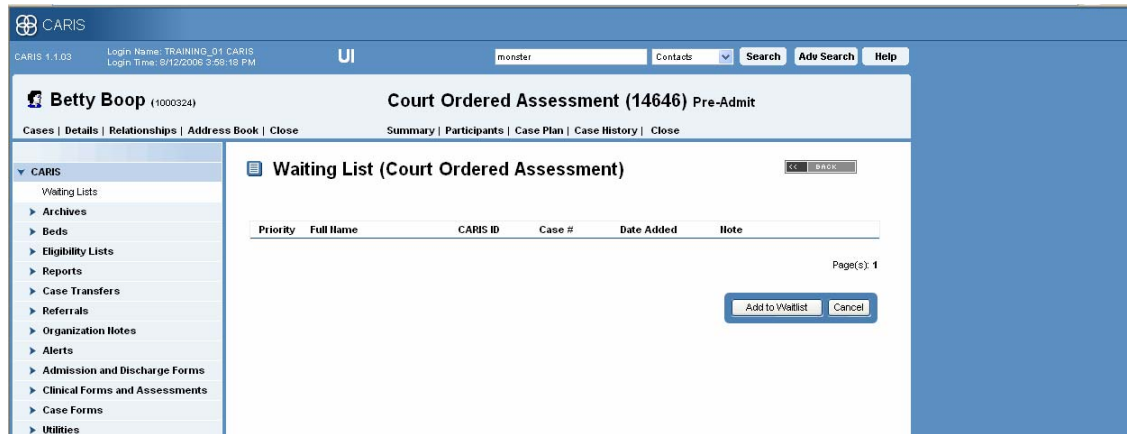
Date Added: Aug-12-2006

Notes:

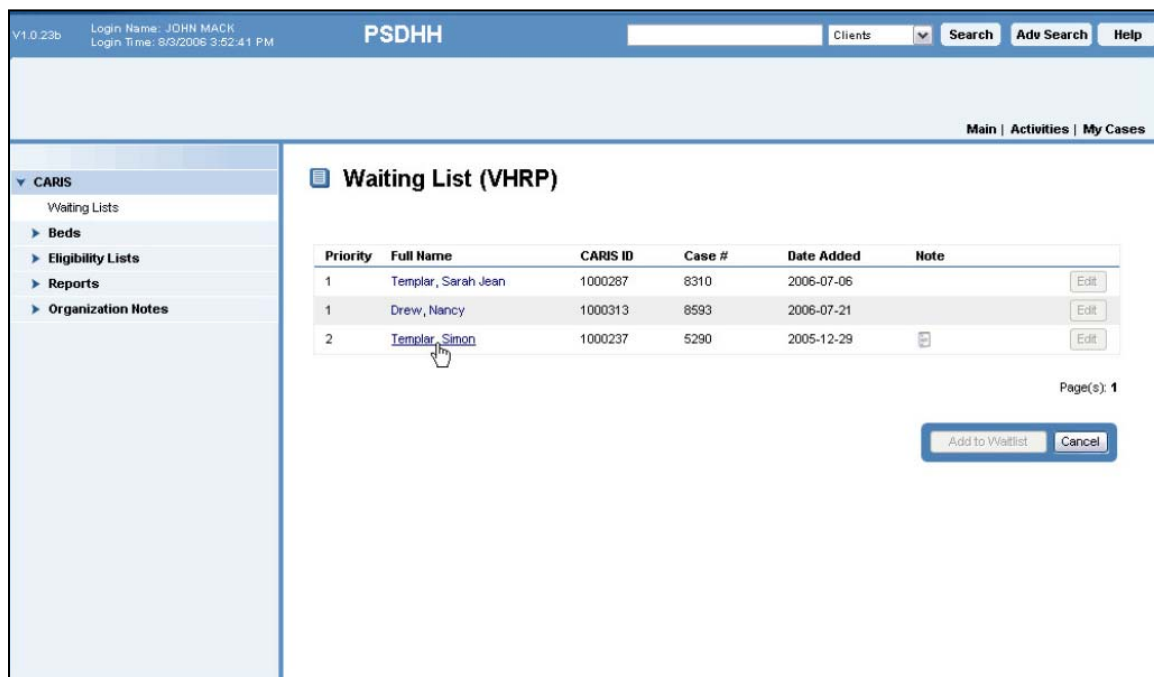
Save Cancel

## Add Client to a Waitlist

1. Bring the Client/Case into context.
2. Open Waiting Lists in the Navigation Tree.
3. Select the appropriate Waiting List and click **View**.
4. Click **Add to Waitlist**.



When the client is on a waiting list you can access the client details by clicking on the **Full Name** link. To access the case details, click the **Case #** link.



## Admit a Client or Cancel a Case

CARIS automatically removes a client from the Waiting List when you Admit or Cancel a Case

1. Bring the Client/Case into Context (remember it must be in Pre-Admit phase).
2. In the “Client Summary” window, click **Admit** (now the case is in Active Phase).

**CARIS**  
CARIS 1.1.03 Login Name: TRAINING\_01 CARIS Login Time: 8/12/2006 3:58:18 PM

UI monster Contacts Search Adv Search Help

**Betty Boop** (1000324) **Court Ordered Assessment (14646) Pre-Admit**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Case Summary** CC BACK

Case Type:	Court Ordered Assessment	Referral Date:	Aug-12-2006
Case Status:	Pre-Admit	Accept/Reject Date:	Aug-12-2006
Case Id:	14646	Admission Date:	...
Case Manager:	CARIS, TRAINING_01	Est. Discharge Date:	...
Referral Source:	Community Living Services	Discharge Date:	...
Referral Mode:	Mail/Courier	Case Close Date:	...
Phase Days:	0		
Bed Information:	...		
Waitlist Information:	Waitlist Enrollment by TRAINING_01 CARIS (2006-08-12 17:22) Priority: 1		

Referral Note:

Reject Referral Accept Referral Cancel Case **Admit** Discharge Close Case

5. Select "Admission Type" from the list in the drop down box and use the calendar to select an "Est Discharge Date".
6. Click Admit.

The screenshot shows the CARIS interface for user Betty Boop (1000324) in the MATC system. The 'Admission Detail' form is displayed, showing the following fields:

- Effective Date: 2006-08-13 15:15
- Admission Type: [dropdown menu]
- MHA Status: [dropdown menu]
- Est Discharge Date: [calendar icon]

Buttons for 'Admit' and 'Cancel' are located at the bottom right of the form. A navigation tree on the left lists various system functions like Waiting Lists, Archives, Beds, Reports, etc.

7. Open Waiting Lists in the Navigation Tree.
8. Select the appropriate Waiting List and click View.
9. The client no longer appears on the Waiting List.

The screenshot shows the CARIS interface for user Betty Boop (1000324) in the UI system. The 'Waiting List (Court Ordered Assessment)' is displayed, showing a table with the following columns:

Priority	Full Name	CARIS ID	Case #	Date Added	Note
Page(s): 1					

Buttons for 'Add to Waitlist' and 'Cancel' are located at the bottom right of the table. A navigation tree on the left lists various system functions like Waiting Lists, Archives, Beds, Reports, etc.



Every case type has its own Waitlist.

To add a client to a Waitlist, the case must be in the Pre-Admit Phase, otherwise the **Add to Waitlist** button will be grayed out.

A client can be on more than one Waitlist.

**Exercise 1**

1. Create a new case and bring into pre-admit phase.
2. Accept the referral.
3. Add your client to a Waiting List.
4. Cancel the case.
5. Confirm the client has been removed from the Waiting List.

**Learning Checkpoint**

1. What phase must a case be in for a client to be added to a Waiting List?

---

2. What two actions will remove a client from a wait list?

---

## Module 7: Working with Cases

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

1. Identify for a client the phase of client service
2. Assign self to case.
3. Add a member to a case.
4. Search the history on a case.
5. Add an alert to a case.

### Assign Self to Case



Full Access: you can assign yourself to a case at any time, for any location to which you have access rights.

Limited Access: you can assign yourself to a case only if you have worked with the client on a previous case, and you can only add yourself to a case to which you have security access.

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

1. Search for the client
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 assign yourself an access level.

CARIS 1.1.03 Login Name: TRAINING\_10 CARIS Login Time: 8/29/2006 9:06:06 PM MATC muffin Clients Search Adv Search Help

**Cranberry Muffin** (1000569)

Cases | Details | Relationships | Address Book | Close

**Case List**

Client Cases

Case Status Filter: All

Case Type	Case Status	Location	Start Date
Bifrost	Follow-up	MATC_3	2006-08-19

Assign

Page(s): 1

External Cases

New Referral



**CARIS**  
CARIS 1.1.03 Login Name: TRAINING\_10 CARIS Login Time: 8/28/2006 9:06:06 PM

**MATC** muffin Clients Search Adv Search Help

**Cranberry Muffin** (1000559)  
Cases | Details | Relationships | Address Book | Close

**Assign Case Member** << BACK

Start Date: 2006-08-28 End Date:   
Client Name: Cranberry Muffin Case Id: 22326  
Member Name: TRAINING\_10 CARIS Role: Child Care Counsellor  
Case Access: Limited Access  
Reason: Assigning self to case reason.

Assign Case Member Cancel

## Exercise 1

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

## View Case Summary

To view the case summary, you need to be in Case context. Open **Summary**.

**CARIS**  
CARIS 1.1.03 Login Name: TRAINING\_05 CARIS Login Time: 8/19/2006 2:09:35 PM

**MATC** muffin Clients Search Adv Search Help

**Cranberry Muffin** (1000559)  
Cases | Details | Relationships | Address Book | Close

**Bifrost (22326) Referral**  
Summary | Participants | Case Plan | Case History | Close

**Case Summary** << BACK

Case Type:	Bifrost	Referral Date:	Aug-19-2006
Case Status:	Referral	Accept/Reject Date:	...
Case Id:	22326	Admission Date:	...
Case Manager:	CARIS, TRAINING_01	Est. Discharge Date:	...
Referral Source:	CYMH	Discharge Date:	...
Referral Mode:	Email	Case Close Date:	...
Phase Days:	0	Respite:	No
Require Care Plan:	No	Designation Date:	...
Forensics Referral:	No	Admission Type:	...
Client Designation:	...		
MHA Status:	...		
Bed Information:	...		
Waitlist Information:	...		

Referral Note:

Reject Referral Accept Referral Cancel Case Admit Discharge Close Case

## View Case History

To view the case history, you need to be in Case context. Open Case History.

The screenshot shows the CARIS MATC interface for a referral case. The top navigation bar includes the CARIS logo, user information (TRAINING\_05 CARIS), and the MATC title. The main header displays the client name 'Cranberry Muffin (1000559)' and the case title 'Bifrost (22326) Referral'. The 'Case History' tab is selected and circled. The left sidebar contains a menu with options like Waiting Lists, Archives, Beds, Reports, Referrals, and Organization Notes. The main content area shows the 'Case Summary' with a table of case details:

Case Type:	Bifrost	Referral Date:	Aug-19-2006
Case Status:	Referral	Accept/Reject Date:	...
Case Id:	22326	Admission Date:	...
Case Manager:	CARIS, TRAINING_01	Est. Discharge Date:	...
Referral Source:	CYMH	Discharge Date:	...
Referral Mode:	Email	Case Close Date:	...
Phase Days:	0		
Require Care Plan:	No	Respite:	No
Forensics Referral:	No		
Client Designation:		Designation Date:	
MMA Status:	...	Admission Type:	...
Bed Information:	...		
Waitlist Information:	...		

At the bottom, there is a 'Referral Note' section and a row of buttons: 'Reject Referral', 'Accept Referral', 'Cancel Case', 'Admit', 'Discharge', and 'Close Case'.

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.

The screenshot shows the CARIS MATC interface for a referral case. The top navigation bar includes the CARIS logo, user information (TRAINING\_10 CARIS), and the MATC title. The main header displays the client name 'Apple Fritter (1000561)' and the case title 'Bifrost (23423) Active'. The 'Case History' tab is selected. The left sidebar contains a menu with options like Waiting Lists, Archives, Beds, Reports, Referrals, and Organization Notes. The main content area shows the 'Search Case History' form with the following fields:

- Keyword:
- Activity Type:
- Start Date:
- End Date:

At the bottom right, there are two buttons: 'Display Activities' and 'Cancel'. The 'Display Activities' button is circled.

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.

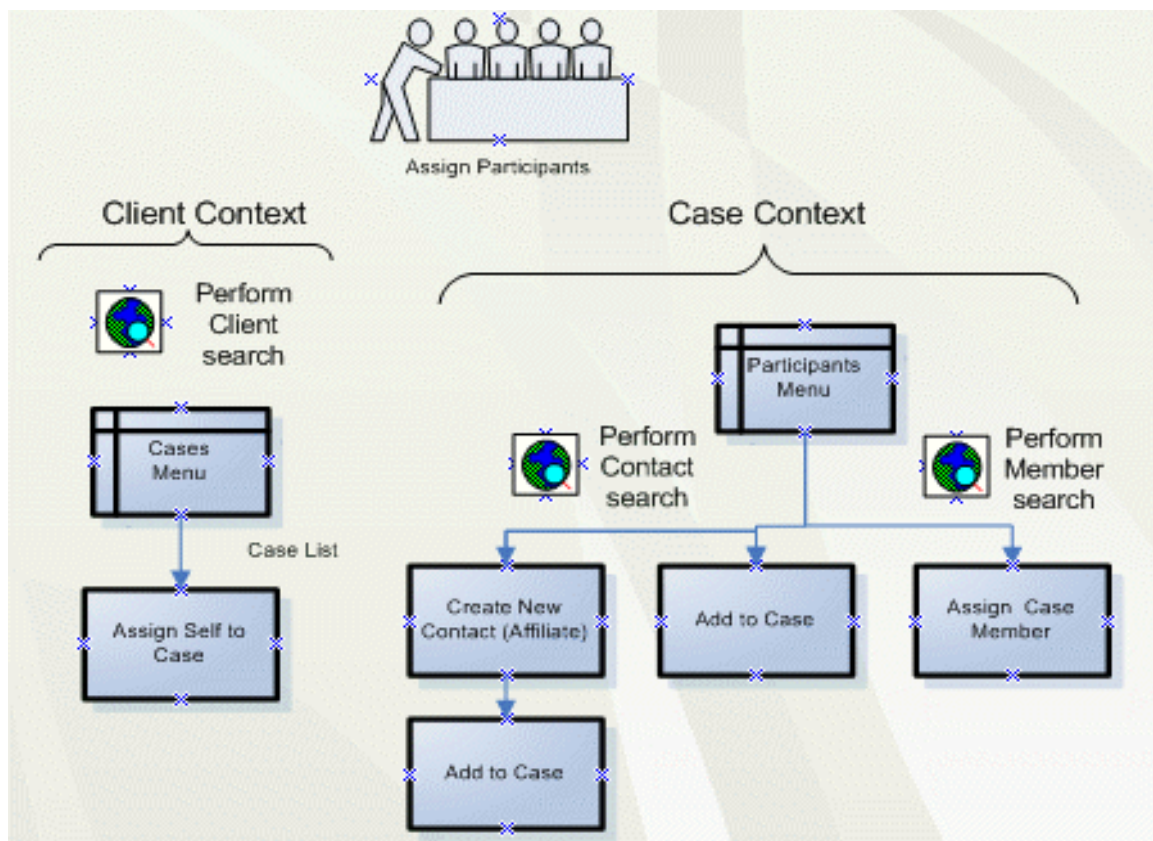
## Add Case Participants

There are 2 types of case participants: affiliates and members.

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.

The screenshot shows the CARIS Case Summary page. The left sidebar contains a navigation menu with options like Waiting Lists, Internal Referrals, Case Transfers, Eligibility Lists, Reports, Facility Notes, Case Notes, Case Forms, and Tools and Utilities. The main content area displays the Case Summary for Michael Farrington, Cymh Outreach (1289) Pre-Admit. The summary includes fields for Case Type, Case Status, Case Id, Case Manager, Referral Source, Referral Mode, Bed Information, and Waitlist Information. At the bottom, there are buttons for Reject Referral, Accept Referral, Cancel Case, Admit, Discharge, and Close Case.

Field	Value	Field	Value
Case Type:	Cymh Outreach	Referral Date:	Aug-04-2005
Case Status:	Pre-Admit	Accept/Reject Date:	Aug-04-2005
Case Id:	1289	Admission Date:	...
Case Manager:	One, Ann_3	Est. Discharge Date:	...
Referral Source:	Self	Discharge Date:	...
Referral Mode:	Walk-in	Case Close Date:	...
Bed Information:	...		
Waitlist Information:	...		

### 1. Open Participants

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

The screenshot shows the CARIS Participants List page. The left sidebar is the same as the previous screenshot. The main content area displays the Participants List for Michael Farrington, Cymh Outreach (1289) Pre-Admit. The list is divided into two sections: Members and Affiliates. Each section has a table with columns for Name, Case Access, Role, Start Date, End Date, and a Remove button.

Members					
Name	Case Access	Start Date	End Date		
One, Ann_3	Case Manager	2005-08-04			Remove
Huber, Anna-Maria	Case Worker	2005-08-08	2005-08-30		Remove

Page(s): 1

Affiliates					
Name	Role	Start Date	End Date		
Reginald, David	General	2005-08-22			Remove
Dean, Steve	General	2005-08-22			Remove

Page(s): 1

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**.

The screenshot shows the CARIS interface for user Michael Farrington. The page title is "Cymh Outreach (1289) Pre-Admit". The left sidebar lists various CARIS modules. The main content area displays "Contact Search Results" with a table containing one entry: CARIS ID PTHR-10000038, Contact Name Theresa, Elizabeth, and Birth Date 1902-04-12. There are buttons for "View", "Advanced Search", and "Create Contact".

CARIS ID	Contact Name	Birth Date
PTHER-10000038	Theresa, Elizabeth	1902-04-12

4. Click **Add to Case**.

The screenshot shows the CARIS interface for user Betty Boop. The page title is "Bifrost (14917) Referral". The left sidebar lists various CARIS modules. The main content area displays "Contact Details (Drop, Lemon)". Below the contact details, there are buttons for "Add to Case", "Relate to Client", "Relationships", "Address Book", and "Edit Contact".

General	
Family Name:	Drop
Given Name:	Lemon
Preferred Name:	Fuzzy Lemon
Aliases:	Fuzzy Lemon
Date of Birth:	01-Jan-00
Gender:	Female
Date of Death:	...

5. Click **Add Case Affiliate**.

The screenshot shows the CARIS interface for user Betty Boop. The page title is "Bifrost (14917) Referral". The left sidebar lists various CARIS modules. The main content area displays the "Add Case Affiliate" form. The form includes fields for Start Date, End Date, Client Name, Case Id, Member Name, and Role. There are buttons for "Add Case Affiliate" and "Cancel".

Add Case Affiliate	
Start Date:	
End Date:	
Client Name:	Boop, Betty B
Case Id:	14917
Member Name:	Drop, Lemon
Role:	

If the person is NOT in the system, 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.

**Michael Farrington**

Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

**Contact Details** (Theresa, Elizabeth)

**General**

Family Name:	Theresa	Given Name:	Elizabeth
Preferred Name:	Mother	Aliases:	...
Date of Birth:	12-Apr-02	Gender:	Female
Date of Death:	...		

**Address Book**

**Relationships**

Add to Case | Relate to Client | Relationships | Address Book | Edit Contact

The new affiliate will display in the “Affiliates” list.

**Michael Farrington**

Cymh Outreach (1289) Pre-Admit

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Activities | Close

**Participants List**

**Members**

Name	Case Access	Start Date	End Date	
One, Ann_3	Case Manager	2005-08-04		<a href="#">Remove</a>
Huber, Anna-Maria	Case Worker	2005-08-08	2005-08-30	<a href="#">Remove</a>

Page(s): 1

**Affiliates**

Name	Role	Start Date	End Date	
Reginald, David	General	2005-08-22		<a href="#">Remove</a>
Dean, Steve	General	2005-08-22		<a href="#">Remove</a>
Theresa, Elizabeth	General	2005-08-22	2005-10-07	<a href="#">Remove</a>

## 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**.

The screenshot displays the CARIS MATC web application interface. At the top, the header shows the CARIS logo, login information (Login Name: TRAINING\_01 CARIS, Login Time: 8/11/2006 1:58:06 PM), and the MATC title. A search bar contains the text 'paris', and there are buttons for 'Members', 'Search', 'Adv Search', and 'Help'. Below the header, the case name 'Harold Potter (1000127)' is shown next to a red warning icon, followed by 'Bifrost (13398) Active' with a yellow warning icon. A navigation bar includes links for 'Cases | Details | Relationships | Address Book | Close' and 'Summary | Participants | Case Plan | Case History | Close'. On the left, a sidebar lists various CARIS modules like 'Waiting Lists', 'Archives', 'Beds', 'Reports', 'Referrals', 'Organization Notes', 'Eligibility Lists', 'Alerts', 'Admission and Discharge Forms', 'Clinical Forms and Assessments', 'Case Forms', and 'Utilities'. The main content area is titled 'Member Search Results' and contains a table with two columns: 'Member Name' and 'Organization'. The table lists several test and training members, each with a 'View' button to its right. The page number 'Page(s): 1' is displayed at the bottom right of the results area.

Member Name	Organization	
CARIS, TEST 1		<a href="#">View</a>
CARIS, TEST 2		<a href="#">View</a>
CARIS, TEST 3		<a href="#">View</a>
CARIS, TRAINING_08		<a href="#">View</a>
CARIS, TRAINING_01		<a href="#">View</a>
CARIS, TRAINING_05		<a href="#">View</a>
CARIS, TRAINING_12		<a href="#">View</a>

Page(s): 1



5. Click **Add to Case**

The screenshot shows the CARIS MATC web application. The top navigation bar includes the CARIS logo, version 1.1.02, login information for TRAINING\_01 CARIS, and the MATC title. A search bar with 'caris' and a 'Members' dropdown is present. The main header displays 'Harold Potter (1000127)' and 'Bifrost (13398) Active'. Below this, a breadcrumb trail shows 'Cases | Details | Relationships | Address Book | Close'. The left sidebar contains a menu with 'CARIS' and various sub-items like 'Waiting Lists', 'Archives', 'Beds', 'Reports', 'Referrals', 'Organization Notes', 'Eligibility Lists', 'Alerts', and 'Admission and Discharge Forms'. The main content area is titled 'Member Details (TEST 1 CARIS)' and includes a 'General' tab with fields for 'First Name: TEST 1', 'Last Name: CARIS', 'Title:', and 'Organization: ...'. An 'Address Book' tab is also visible. An 'Add to Case' button is located at the bottom right of the member details section.

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 screenshot shows the 'Assign Case Member' form in the CARIS MATC web application. The top navigation bar is identical to the previous screenshot. The main header displays 'Betty Boop (1000324)' and 'Bifrost (14917) Referral'. The breadcrumb trail is 'Cases | Details | Relationships | Address Book | Close'. The left sidebar menu is also identical. The main content area is titled 'Assign Case Member' and includes a 'Start Date' field with a calendar icon (set to 2006-06-13), an 'End Date' field with a calendar icon, a 'Client Name' field (set to Boop, Betty B.), a 'Case Id' field (set to 14917), a 'Member Name' dropdown (set to TRAINING\_05 CARIS), and a 'Role' dropdown. An 'Assign Case Member' button and a 'Cancel' button are at the bottom right of the form.

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.

The screenshot shows the CARIS MATC interface. The user is logged in as Harold Potter (1000127). The case being viewed is Bifrost (13398), which is active. The interface includes a sidebar with navigation options like Waiting Lists, Archives, Beds, Reports, Referrals, and Organization Notes. The main content area displays the 'Participants List' for the selected case. It contains two tables: 'Members' and 'Affiliates'.

Name	Case Access	Start Date	End Date	
CARIS_TRAINING_01	Case Manager - Full Access	2006-08-10		<a href="#">Remove</a>
CARIS_TRAINING_05	Nurse - Limited Access	2006-08-11	2006-08-13	<a href="#">Remove</a>
NGAI, MITCHELL	Case Manager - Full Access	2006-08-12		<a href="#">Remove</a>

Page(s): 1

Name	Role	Start Date	End Date
------	------	------------	----------

Page(s): 1

### 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.

## 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.

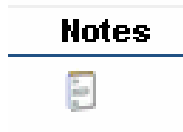
To add an alert to a client's file, the client must have a case open.

1. Click on Cases
2. Open Alerts in the Navigation Tree

The screenshot shows the CARIS web application interface. At the top, the user is logged in as 'Anni@YFV' on 9/22/2005. The main header displays the client's name 'Jason Marceau' and the case title 'Program B (35749) Referral'. Below the header, there are tabs for 'Cases', 'Details', 'Relationships', 'Address Book', and 'Close'. The left navigation tree is expanded, showing 'Alerts' under 'Cases'. The main content area is titled 'General Alerts' and contains a table with columns: Type, Creator, Start Date, End Date, and Notes. Below the table, there is a button labeled 'Add Alert'. Annotations with arrows point to the 'General Alerts' link in the navigation tree and the 'Add Alert' button.

3. Choose the type of Alert you wish to generate
4. Click **Add Alert**
5. Select the type of Alert from the drop down list
6. 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**
7. 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.

#### **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 case participants?

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

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3. What are the two types of alerts?

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## Module 8: 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**.

The screenshot displays the CARIS MATC web application interface. The top navigation bar includes the CARIS logo, version 1.1.02, login information for 'TRAINING\_01 CARIS', and a search bar. The main header identifies the user as 'Harold Potter (1000127)' and the case as 'Careplan Consultants (13523) Pre-Admit'. A sidebar on the left lists various system functions like 'Waiting Lists', 'Archives', 'Beds', 'Reports', 'Referrals', 'Organization Notes', 'Eligibility Lists', 'Alerts', 'Admission and Discharge Forms', and 'Case Forms'. The central content area is titled 'Goals and Objectives' and shows a table with one entry: 'GOAL: Goal 1' with a status of '[Scheduled]'. A 'Create Goal' button is visible at the bottom right of the table area.

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*.

The screenshot shows the CARIS MATC interface. The top header includes the CARIS logo, version 1.1.02, login information for 'TRAINING\_01 CARIS', and the MATC title. A navigation bar shows 'Harold Potter (1000127)' and 'Careplan Consultants (13523) Pre-Admit'. Below this is a sidebar with a 'CARIS' menu containing options like 'Waiting Lists', 'Archives', 'Beds', 'Reports', 'Referrals', 'Organization Notes', 'Eligibility Lists', 'Alerts', 'Admission and Discharge Forms', 'Case Forms', and 'Utilities'. The main content area is titled 'Create Goal' and contains a form with the following fields: 'Goal' (a dropdown menu), 'User Defined Goal' (a text input), 'Priority' (a dropdown menu), 'Status' (a dropdown menu currently showing 'Active'), 'Critical Date' (a date picker), 'Start Date' (a date picker), 'End Date' (a date picker), and 'Note' (a text area). At the bottom right of the form are 'Save' and 'Cancel' buttons.

## Create Objectives

When a Goal has been defined and saved, you can add one or more objectives to the goal.

1. Bring Client's Case into context.
2. Open Case Plan.
3. Expand the appropriate Goal by clicking the + sign.
4. Click **Create Objective**.

**Harold Potter** (1000127)

**Careplan Consultants (13523) Pre-Admit**

Cases | Details | Relationships | Address Book | Close      Summary | Participants | Case Plan | Case History | Close

**Goals and Objectives**

GOAL: Goal 1 [Scheduled]

Goal Details:

Priority:	1	Status:	Active
Critical Date:	2006-08-14	End Date:	2006-08-18
Start Date:	2006-08-18		

Note:

OBJECTIVE: Objective 1 [Scheduled]

Page(s): 1

**Create Goal**

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**.

### Create Objective

<< BACK

Goal: Stop teasing Elmer Fudd

Objective: User Defined Objective

User Defined Objective:

Priority: Status: Pending

Critical Date: 2006-09-18 Approach: General

Start Date: 2006-09-18 End Date:

Note:

Save Cancel



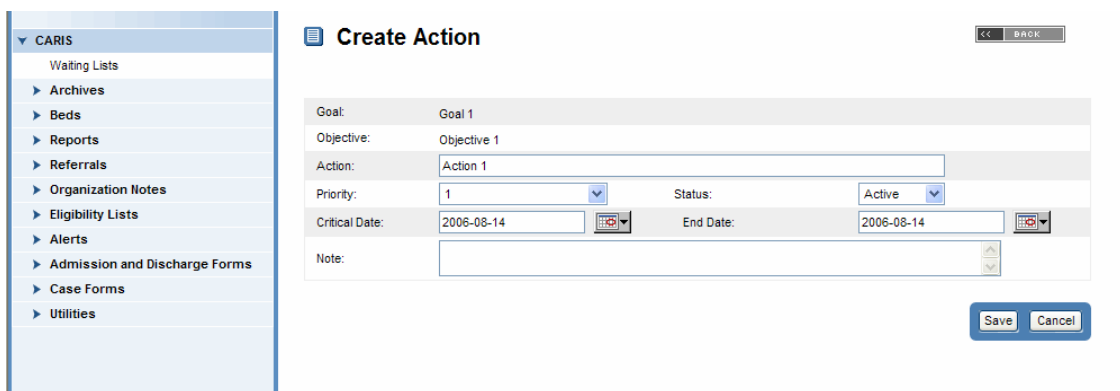
You can have several objectives for a given Goal, but you have to create each one separately.



## 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**.



The screenshot shows the 'Create Action' form. On the left is a sidebar with a tree view containing 'CARIS' and various categories like 'Waiting Lists', 'Archives', 'Beds', 'Reports', 'Referrals', 'Organization Notes', 'Eligibility Lists', 'Alerts', 'Admission and Discharge Forms', 'Case Forms', and 'Utilities'. The main form area has a title bar 'Create Action' with a 'Back' button. Below the title bar are several rows of input fields: 'Goal:' with 'Goal 1', 'Objective:' with 'Objective 1', 'Action:' with 'Action 1', 'Priority:' with a dropdown set to '1', 'Status:' with a dropdown set to 'Active', 'Critical Date:' with a date field set to '2006-08-14', 'End Date:' with a date field set to '2006-08-14', and a 'Note:' field. At the bottom right are 'Save' and 'Cancel' buttons.



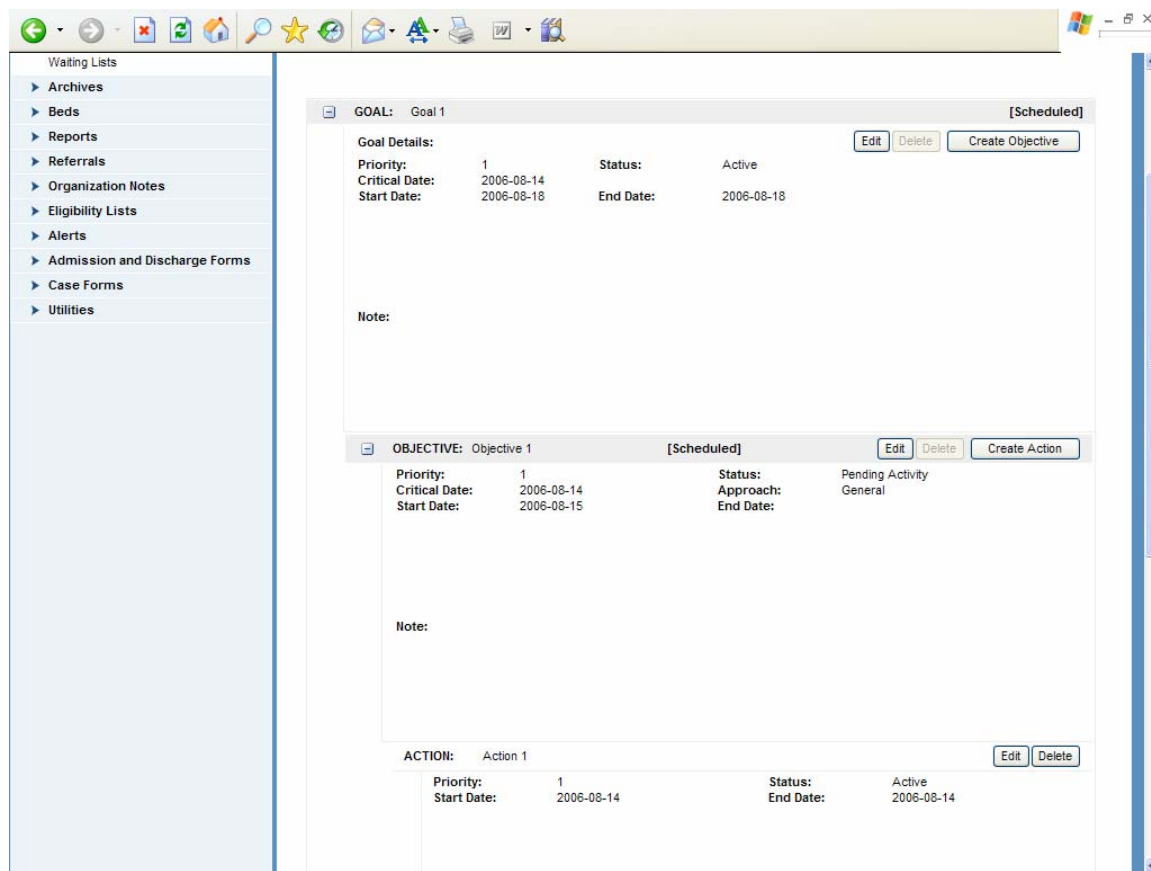
You will note that this button is in the “Objectives” part of the display. You cannot create an Action until you have decided on an Objective.

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**



**GOAL: Goal 1** [Scheduled] Edit Delete Create Objective

**Goal Details:**

Priority:	1	Status:	Active
Critical Date:	2006-08-14		
Start Date:	2006-08-18	End Date:	2006-08-18

Note:

---

**OBJECTIVE: Objective 1** [Scheduled] Edit Delete Create Action

Priority:	1	Status:	Pending Activity
Critical Date:	2006-08-14	Approach:	General
Start Date:	2006-08-15	End Date:	

Note:

---

**ACTION: Action 1** Edit Delete

Priority:	1	Status:	Active
Start Date:	2006-08-14	End Date:	2006-08-14



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 9: Admission and Discharge Forms

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

1. Perform common functions in forms.
2. 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 Admission and Discharge Forms. The types of forms that will be available to you will depend on the status of the case.

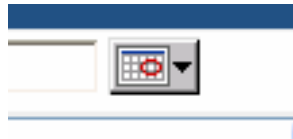
Form	Referral	Pre-Admit	Active	Follow-Up	Closed
Meeting Minutes		X	X	X	
Psychiatric Admission Notes		X	X	X	
Diagnostic Classification Formulation		X	X	X	
Child Care/Nursing Admission Notes		X	X	X	
Discharge Form			X	X	

Samples of these forms follow.

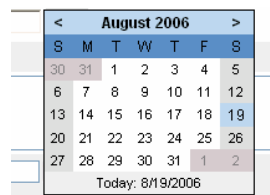


## In CARIS, forms often have the following common features/functions:

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 arrow heads, 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 an arrow head at the end of the field when clicked will display a list of values for you to choose from.


Referral Target:  

Notes:

Referral Target: 

Notes:

Add Attachment:    
(Max file size: 20MB)

 Goals & Objectives

- Addictions
- Adoptions
- Adult Mental Health
- Child Protection
- Community Living Services
- Community Service Agency
- C/MH
- Family Services
- General Hospital
- General or Family Practitioner
- Maples
- None
- Pediatrician
- Preschool
- PSDHH
- Psychiatric Hospital
- Psychiatric Unit
- Psychiatrist
- Public Health
- Rehab
- Residential Facility
- School
- Social Services and Income Assistance
- YFPS
- Youth Services
- Other

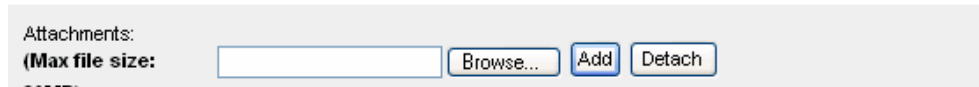
3. Fields with an Add and a Delete button allow you to choose a category from the first drop-down list box and then a type from the second.

The screenshot shows the CARIS MATC interface for a 'Bifrost (22326) Referral'. The left sidebar contains a navigation menu with categories like CARIS, Waiting Lists, Archives, Beds, Reports, Referrals, Organization Notes, Eligibility Lists, Alerts, Admission and Discharge Forms, Case Forms, and Utilities. The main content area is titled 'Presenting Issues'. It features two drop-down menus for selecting a category and a type. Below these is a text area for notes. At the bottom right, there are 'Add' and 'Delete' buttons. A circle highlights these buttons. The interface also includes a 'Reported by' field, a 'Date' field (set to 2006-08-19), and an 'Attachments' section with a 'Browse...' button and 'Add' and 'Detach' buttons. At the very bottom, there are 'Create Note' and 'Cancel' buttons.

Clicking **Add**, adds the value to the box below. This allows you to add multiple values. To delete a value, highlight the value and click **Delete**.

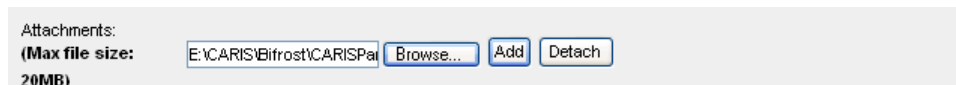
This screenshot shows the same CARIS MATC interface, but with the second drop-down menu open, displaying a list of options: 'Problems in School Work', 'Cognitive or Learning Difficulty', 'Problems in School Behaviour', and 'Problems in School Work'. The 'Add' and 'Delete' buttons are still visible and highlighted with a circle. The rest of the interface, including the sidebar and other form fields, remains the same as in the previous screenshot.

4. Certain forms allow for attachments. To add an attachment, use the **Browse** button to locate the attachment on your workstation.



Attachments:  
(Max file size: )

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



Attachments:  
(Max file size: )     
(20MB)

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



Attachment:      
(Max file size: 3MB)  

CARIS attach test.doc (19KB)

5. Forms are set up to work from left to right and then down. Shading is used to designate the different parts of a form.

## 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.

The screenshot displays the CARIS MATC web application interface. At the top, the header includes the CARIS logo, version 1.1.02, login information for 'TRAINING\_01 CARIS', and the MATC title. A search bar with 'harry' and buttons for 'Search', 'Adv Search', and 'Help' are present. Below the header, the user profile for 'Harold Potter (1000127)' is shown, along with the case identifier 'Bifrost (13398) Active'. A navigation bar contains links for 'Cases | Details | Relationships | Address Book | Close' and 'Summary | Participants | Case Plan | Case History | Close'. The left sidebar, titled 'CARIS', lists various modules, with 'Admission and Discharge Forms' expanded to show 'Meeting Minutes'. The main content area, titled 'Meeting Minutes', contains three text input fields: 'Goal(s):', 'Long-Term Plan(s):', and 'Other Issues:'. Each field has a small up/down arrow icon on its right side. At the bottom right of the form, there are three buttons: 'Save', 'Save & Print', and 'Finalize & Print'.



## 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**.

The screenshot shows a web application interface for a patient named Bifrost (13398), who is Active. The interface includes a navigation bar with links for 'is Book | Close', 'Summary | Participants | Case Plan | Case History | Close'. Below this, the title 'Psychiatric Admission Notes' is displayed. The form contains four text input fields, each with a label on the left and a text area on the right: 'Presenting Problems:', 'Mental Issues on Admission:', 'Diagnostic Impression on Admission:', and 'Initial Plan:'. At the bottom right of the form, there are four buttons: 'Save', 'Cancel', 'Finalize', and 'Print'.

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 ICD-10 form.)
2. Click **New Formulation**.
3. Complete the fields as required.
4. Click **Save** or **Save & Print**.

### Record Diagnostic Classification Formulation

DSM-IV Assessment		
<b>Axis I</b>		
Order	Code	Description
1	314.01	Attention-deficit/hyperactivity disorder, combined type
2	300.02	Generalized anxiety disorder
<b>Axis II</b>		
Order	Code	Description
1	v71.09	No diagnosis or condition on Axis III
<b>Axis III</b>		
<b>Value</b>	no general health issues apparent	
<b>Axis IV</b>		
Order	Code	Description
1	2-4	Problems related to the social environment
2	3-4	Educational problems
<b>GAF (V)</b>		
Score	Description	
58	Moderate symptoms OR Moderate difficulty in social, occupational, or school functioning	
<b>Note</b>		
<b>Value</b>		
ICD 10 Assessment		
<b>Axis I</b>		
Order	Code	Description
1	f90.0	Disturbance of activity and attention
<b>Note</b>		
<b>Value</b>		
Formulation Fields		
Date:	<input type="text" value="2006-11-28"/>	
Type:	<input type="text"/>	
On Behalf Of:	<input type="text"/>	
Formulation:	<div style="border: 1px solid black; height: 100px;"></div>	

## 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.

### View Finalized Child Care/Nursing Admission Note

Record Date:	2006-10-24	
Physical description general health & appearance:	Tor is a tall well built young man with light Blond, almost white, hair and blue eyes (very light blue). He is well groomed and when unpacking took pride in many of his possessions.	
Comment on all perceived or stated medical problems:	none	
Medication(s) Accompanying Adolescent::	Strattera - 27 80mg tablets in blister pack. Vitamins	
Perceived mood:	A bit worried about being away from home for so long. Generally happy.	
General behaviour:	Chatting with staff and other residents. a little hyper and difficulty staying on task for more than ten minutes.	
Initial attitude towards unit, staff and peers:	Positive. wants to be friends with everyone and seems to be good at creating a positive first impression.	
Other issues or concerns:	Needed to be stopped from giving other residents things in an attempt to win friends. Understood this was not an expectation of him and was unlikely to be reciprocated.	



## 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**.

### Discharge Form

Discharge Date:	N/A
Reason:	<div><div></div><div>AddDelete</div></div> <div></div>
Responsible Agent:	<div></div>
Discharge Note:	<div></div>
Summary of Services Received:	<div></div>
Post-Service Recommendations:	<div></div>

Save

Cancel

**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.

---

---

---

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

---

---

## Module 10: 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.

Samples of these forms follow.

Form	Referral	Pre-Admit	Active	Follow-Up	Closed
DSM-IV (TR) Diagnostic Classification		X	X	X	
ICD 10		X	X	X	
Diagnostic Classification Formulation		X	X	X	
Medications		X	X	X	
Progress Notes		X	X	X	

## 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.)

The screenshot shows the 'ICD 10 Diagnostics Classification' form. The left navigation pane has 'Clinical Forms and Assessments' expanded, with 'ICD 10' selected. The form itself has a title bar 'ICD 10 Diagnostics Classification' and a sub-header 'ICD 10 Assessment'. It includes a 'Date:' field, five columns for 'Primary', '2nd', '3rd', '4th', and '5th' diagnoses, and a 'Note:' field. Below the form are buttons for 'Validate Codes', 'Edit Codes', 'Validate Result', and 'Note'. At the bottom right are 'Save' and 'Finalize' buttons. Two arrows point from the 'Note' field and the 'Note' button to the text below.


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

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

## 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 form.)
2. Click **New Formulation**.
3. Complete the fields as required.
4. Click **Save** or **Save & Print**.

### Record Diagnostic Classification Formulation

DSM-IV Assessment		
<b>Axis I</b>		
Order	Code	Description
1	314.01	Attention-deficit/hyperactivity disorder, combined type
2	300.02	Generalized anxiety disorder
<b>Axis II</b>		
Order	Code	Description
1	v71.09	No diagnosis or condition on Axis III
<b>Axis III</b>		
<b>Value</b>	no general health issues apparent	
<b>Axis IV</b>		
Order	Code	Description
1	2-4	Problems related to the social environment
2	3-4	Educational problems
<b>GAF (V)</b>		
Score	Description	
58	Moderate symptoms OR Moderate difficulty in social, occupational, or school functioning	
<b>Note</b>		
<b>Value</b>		
ICD 10 Assessment		
<b>Axis I</b>		
Order	Code	Description
1	f90.0	Disturbance of activity and attention
<b>Note</b>		
<b>Value</b>		
Formulation Fields		
Date:	<input type="text" value="2006-11-28"/>	
Type:	<input type="text"/>	
On Behalf Of:	<input type="text"/>	
Formulation:	<div style="border: 1px solid black; height: 100px;"></div>	



## Medications

1. Open Clinical Forms and Assessments in the Navigation Tree and then Medications.
2. Click **Add Medication**.

The screenshot shows the CARIS application interface. On the left is a navigation tree with the following items: CARIS, Waiting Lists, Archives, Beds, Reports, Referrals, Organization Notes, Eligibility Lists, Alerts, Admission and Discharge Forms, Clinical Forms and Assessments (expanded), DSM-IV (TR) Diagnostic Classifications, ICD 10, and Provisional Diagnoses. The main content area is titled 'Medications'. It features an 'Administration Date Filter' set to 'Today' and a 'View By' dropdown set to 'Medication'. Below this is a table with columns: Medication Name, Medication Class, Prescribing Physician, Dosage, Start Date, and End Date. The table shows 'Page(s): 1' and an 'Add Medication' button.

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**.

The screenshot shows the 'Add Medication' form in the CARIS application. The navigation tree on the left is the same as in the previous screenshot, with 'Medications' now selected under 'Clinical Forms and Assessments'. The form fields include: Medication Class (dropdown), Medication Name (text input with a search button '[s]'), Prescribing Physician (text input), Dosage Info (text input), Delivery Route (text input), Frequency Info (text input), Time(s) (text input with a search button '[C]'), Start Date (calendar icon, pre-filled with 8/10/2006), and End Date (calendar icon). There is also an 'Administration Instruction' text area. At the bottom right, the 'Add Medication' and 'Cancel' buttons are circled. An arrow from step 3 points to the '[s]' search button in the Medication Name field.

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

**Luke Skywalker** (1000314) **General Treatment (27608) Active - Treatment**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Medications**

Administration Date Filter: Today View By: Medication

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
+ ventolin	Prescription	Dr Who	2 puffs	2006-09-08	2006-09-29

Frequency: as needed  
Delivery Route: inhaler  
Times:  
Instructions: Discontinue Administer

Page(s): 1

Add 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**.

**Luke Skywalker** (1000314) **General Treatment (27608) Active - Treatment**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Record Medication Administration**

Medication Name: ventolin  
Dosage Info: 2 puffs Delivery Route: inhaler  
Frequency Info: as needed

Date: Today Time: 2:15 PM  
Code: Administered  
Notes:

Save Cancel

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

The screenshot displays the CARIS MATC web application interface. The top navigation bar includes the CARIS logo, version 1.1.03, login information for 'TRAINING\_01 CARIS', and the MATC title. A search bar contains the text 'dagwood'. The main header identifies the client as 'Dagwood Bumstead (1000328)' and the case as 'Response Residential (15187) Active'. Below this, a series of tabs allows navigation between 'Cases', 'Details', 'Relationships', 'Address Book', 'Summary', 'Participants', 'Case Plan', and 'Case History'. The left sidebar provides a hierarchical menu of system features, with 'Eligibility Lists' and 'Clinical Forms and Assessments' currently expanded. The central 'Medications' section features a table with columns for Medication Name, Medication Class, Prescribing Physician, Dosage, Start Date, and End Date. A single entry for 'Aspirin' is shown, with details for frequency, delivery route, and administration date/time. Below the table, there are buttons for 'Discontinue' and 'Administer', and an 'Add Medication' button at the bottom right.

**Medications**

Administration Date Filter: Today View By: Medication

Medication Name	Medication Class	Prescribing Physician	Dosage	Start Date	End Date
Aspirin	Non-Prescription	Dr. Dithers	1 tablet	2006-08-13	2006-12-29

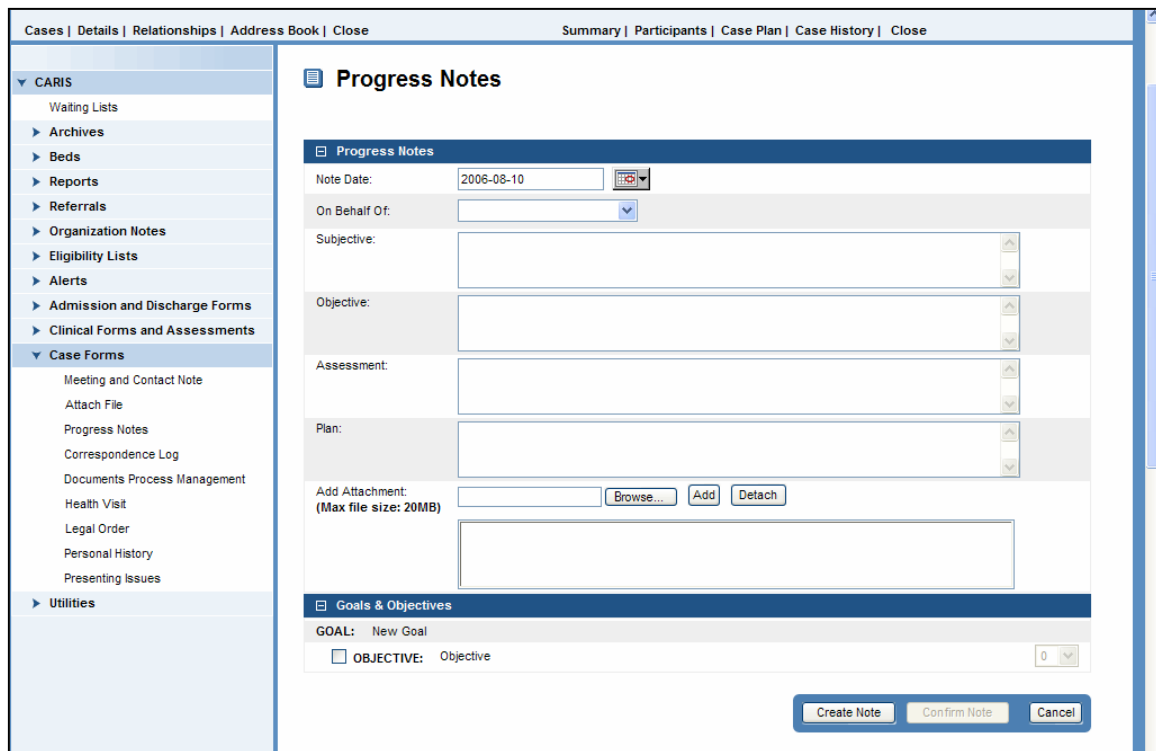
Frequency: prn  
Delivery Route: by mouth  
Admin Date Time: 2006-08-13 17:30:00  
Admin Code: Administered  
Admin By: CARIS, TRAINING\_01  
Note: [Delete]

Instructions:  
[Discontinue] [Administer]

Page(s): 1  
[Add Medication]

## Progress Notes

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



The screenshot shows the CARIS web application interface for creating a Progress Note. The top navigation bar includes links for Cases, Details, Relationships, Address Book, Close, Summary, Participants, Case Plan, Case History, and Close. The left sidebar contains a navigation tree with categories like CARIS, Archives, Beds, Reports, Referrals, Organization Notes, Eligibility Lists, Alerts, Admission and Discharge Forms, Clinical Forms and Assessments, Case Forms (selected), and Utilities. Under Case Forms, options include Meeting and Contact Note, Attach File, Progress Notes (selected), Correspondence Log, Documents Process Management, Health Visit, Legal Order, Personal History, and Presenting Issues. The main content area is titled 'Progress Notes' and contains several input fields: Note Date (2006-08-10), On Behalf Of (dropdown), Subject (text area), Objective (text area), Assessment (text area), and Plan (text area). Below these is an 'Add Attachment' section with a file input, 'Browse...', 'Add', and 'Detach' buttons. At the bottom, there is a 'Goals & Objectives' section with a 'GOAL: New Goal' dropdown and an 'OBJECTIVE: Objective' dropdown with a value of 0. A 'Create Note' button is located at the bottom right of the form.



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.

**Exercise 1**

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

**Learning Checkpoint**

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

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---

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## Module 11: 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.

Form	Referral	Pre-Admit	Active	Follow-Up	Closed
Meeting & Contact Note		X	X	X	
Attach File		X	X	X	
Progress Note		X	X	X	
Documents Management	X	X	X	X	
Legal Order	X	X	X	X	
Presenting Issues	<b>Part of the Admissions Process</b>				

(note some forms appear on the Navigation Tree but are not used for MATC)

Samples of these forms follow.

## Meeting & Contact Note

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

The screenshot shows the 'Meeting & Contact Note' form. The left navigation pane highlights 'Case Forms' > 'Meeting and Contact Note'. The main form area has a title bar 'Meeting & Contact Note'. Below it, the 'Meeting & Contact Notes' section contains fields for 'Meeting Type', 'Mode of Meeting', 'Client Attendance', 'Date' (8/12/2006), 'Start Time' (11:50 PM), 'Duration', 'Reason for meeting', 'Meeting Attendees' (a dropdown menu circled), 'Role', 'Add', and 'Delete' buttons. The 'Note' section has a large text area. The 'Attachment' section includes a file upload button and a 'Browse...' button. The 'Goals & Objectives' section includes a 'GOAL' field, a 'New Goal' button, an 'OBJECTIVE' field, and a progress indicator (0) circled. The 'Save' and 'Cancel' buttons are at the bottom right. Two arrows point from the text below to the circled elements: one to the 'Meeting Attendees' dropdown and another to the progress indicator.

Meeting Attendees are other members of the case.

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.)



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.

## 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 screenshot displays the 'Attach File' interface within the CARIS system. On the left is a navigation tree with categories like 'CARIS', 'Waiting Lists', 'Archives', 'Beds', 'Reports', 'Referrals', 'Organization Notes', 'Eligibility Lists', 'Alerts', 'Admission and Discharge Forms', 'Clinical Forms and Assessments', and 'Case Forms'. Under 'Case Forms', 'Meeting and Contact Note' and 'Attach File' are listed. The main content area is titled 'Attach File' and contains a form with the following elements:

- A 'Document Name' text input field.
- An 'Attachment' text input field with a note '(Max file size: 20MB)' below it.
- 'Browse...', 'Add', and 'Detach' buttons positioned to the right of the 'Attachment' field.
- A large empty rectangular box below the 'Attachment' field.
- 'Submit' and 'Cancel' buttons at the bottom right of the form.



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**.

The screenshot shows the CARIS Progress Notes form. The left sidebar contains a navigation tree with 'Case Forms' expanded, showing options like 'Meeting and Contact Note', 'Attach File', 'Progress Notes', 'Correspondence Log', 'Documents Process Management', 'Health Visit', 'Legal Order', 'Personal History', and 'Presenting Issues'. The main form area has a title bar 'Progress Notes' and several input fields: 'Note Date' (2006-08-10), 'On Behalf Of' (dropdown), 'Subjective', 'Objective', 'Assessment', and 'Plan'. Below these is an 'Add Attachment' section with a file input, a 'Browse...' button, and 'Add' and 'Detach' buttons. At the bottom is a 'Goals & Objectives' section with a 'GOAL: New Goal' dropdown and an 'OBJECTIVE: Objective' dropdown. At the very bottom are 'Create Note', 'Confirm Note', and 'Cancel' buttons.



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.

## Document Management

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

CARIS 1.1.03 Login Name: TRAINING\_01 CARIS Login Time: 8/12/2006 10:51:12 PM MATC

harry Clients Search Adv Search Help

**Harold Potter** (1000127) **Bifrost (13398) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Processed Documents List**

Date	Document
2006-08-07	Legal - Unit Staff Admission Checklist

Page(s): 1

New Document

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

**Single Document Collection Recording** << BACK

Date:

Document Title:

On Behalf Of:

Note:

Attachment:  Browse... Add Detach

(Max file size: 3MB)

**Goals & Objectives**

GOAL: Increase flying skills

☐ OBJECTIVE: Learn to stay on broom in twists

If this document supports an objective, tick this radio box.

Save Cancel

## Health Visit

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

The screenshot shows the CARIS software interface for the 'Health Visit' form. On the left is a navigation tree with categories: CARIS, Waiting Lists, Archives, Beds, Reports, Referrals, Organization Notes, Eligibility Lists, Alerts, Admission and Discharge Forms, Clinical Forms and Assessments, Case Forms (expanded), Meeting and Contact Note, Attach File, Progress Notes, Correspondence Log, Documents Process Management, Health Visit (selected), Legal Order, Personal History, Presenting Issues, and Utilities. The main window has tabs: Cases | Details | Relationships | Address Book | Close, and Summary | Participants | Case Plan | Case History | Close. The 'Health Visit' form is displayed with the following fields: Appointment Type (Medical), Topic/Subject, Health Professional's Name, Phone Number, Ext, Mode of Meeting, Note, Attachment (with a file upload area and buttons for Browse, Add, and Detach), Date (8/10/2006), Start Time (2:35 PM), and Duration. Below these is a 'Goals & Objectives' section with a 'GOAL: New Goal' and an 'OBJECTIVE: Objective' checkbox. At the bottom right are 'Record' and 'Cancel' buttons.

## Legal Order

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

Cases | Details | Relationships | Address Book | Close      Summary | Participants | Case Plan | Case History | Close

**Legal Order Forms Display**

Legal Order Type	Court Location	Court Date	Judge Name	Note
Page(s): 1				

**New Legal Order**

3. Mark the form as required.
4. Click **Record Observation**.

Cases | Details | Relationships | Address Book | Close      Summary | Participants | Case Plan | Case History | Close

**Legal Order**

Legal Order Type:

Legal Status:

Effective Date:  End Date:

Court Location:

Court Date:

Judge Name:

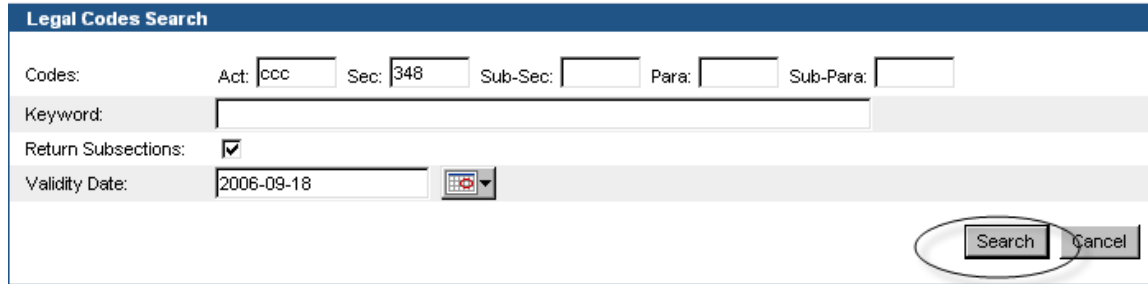
Legal Code:

Charge Date:  No. of Charge:

Note:

**Record Observation** **Cancel**

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


A screenshot of a web form titled "Legal Codes Search". The form has a blue header bar with the title. Below the header, there are several input fields: "Codes:" with sub-fields for "Act:" (containing "ccc"), "Sec:" (containing "348"), "Sub-Sec:" (empty), "Para:" (empty), and "Sub-Para:" (empty). There is a "Keyword:" field below these. A "Return Subsections:" checkbox is checked. A "Validity Date:" field contains "2006-09-18" and has a calendar icon to its right. At the bottom right, there are "Search" and "Cancel" buttons. The "Search" button is circled in red.

**Legal Codes Search**

Codes: Act:  Sec:  Sub-Sec:  Para:  Sub-Para:

Keyword:

Return Subsections: ☒

Validity Date:  

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.



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

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

### Options on Save

Save Options	Forms
Save, Cancel	Meeting & Contact Note, Document Management, Discharge Form
Create Note, Confirm Note, Cancel	Progress Note
Record, Cancel	Health Visit, Legal Order
Create Note, Cancel	Presenting Issues
Save, Finalize	DSM-IV, ICD-10
Save, Save & Print, Cancel	Diagnostic Classification Formulation
Save, Save & Print, Finalize, Print	Meeting Minutes, Child Care/Nursing Admission Notes
Save, Cancel, Finalize, Print	Psychiatric Admission Notes

### Exercise 1

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

### Learning Checkpoint

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

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

---

## Module 12: Eligibility Lists

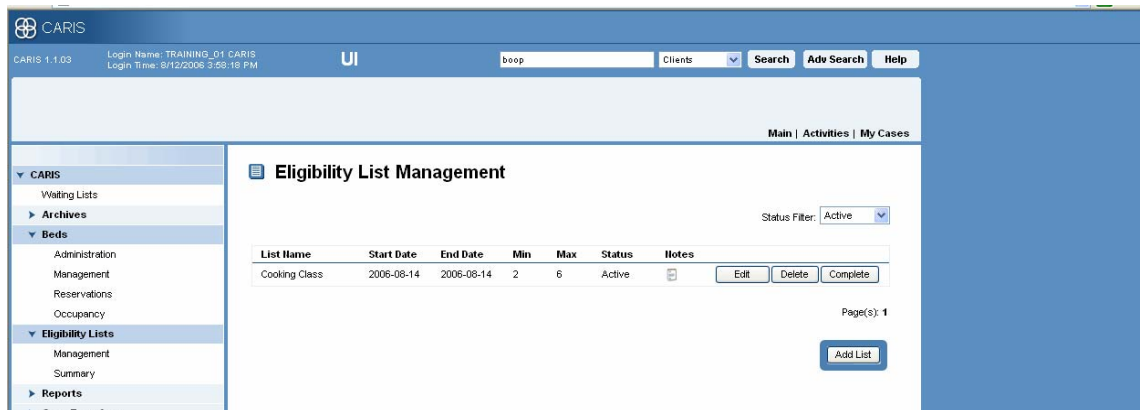
At the end of this module, participants will be able to:

1. Create Eligibility List.
2. Update and delete an Eligibility List.
3. Add and remove a participant to an Eligibility List.

### Eligibility List Management

Eligibility lists in CARIS are activities in which clients and their affiliates can be registered to participate. The Eligibility List Management function allows you to edit, delete, or close activities.

1. Open Eligibility Lists in the Navigation Tree and then Management.



2. To add a new activity, click **Add List**.



3. Enter the name of the activity in the “List Name” field, select a “Start Date” and an “End Date”, enter the minimum and maximum number of participants, and add a note, if appropriate.
4. Click **Save**.

The screenshot shows the CARIS MATC interface. The left sidebar contains a navigation menu with options like Waiting Lists, Archives, Beds, Reports, Organization Notes, Eligibility Lists (selected), Management, Summary, Admission and Discharge Forms, and Utilities. The main content area is titled 'Create Eligibility List' and includes a 'BACK' button. The form fields are: List Name (text input), Start Date (calendar icon), End Date (calendar icon), Minimum Participants (text input), Maximum Participants (text input), and List Description (text area). At the bottom right are 'Save' and 'Cancel' buttons.

5. Once the Eligibility List activity has been created, it can be updated, deleted, or completed by clicking the appropriate button.

The screenshot shows the CARIS UI interface. The left sidebar is similar to the previous screenshot but includes 'Administration' and 'Reservations' under 'Beds'. The main content area is titled 'Eligibility List Management' and includes a 'Status Filter' dropdown set to 'Active'. Below is a table with the following data:

List Name	Start Date	End Date	Min	Max	Status	Notes
Cooking Class	2006-08-14	2006-08-14	2	6	Active	

Below the table are 'Edit', 'Delete', and 'Complete' buttons. At the bottom right is an 'Add List' button. The page number 'Page(s): 1' is displayed.

## Edit an Eligibility List

1. You can start in CARIS context
2. Open Eligibility List in the Navigation Tree
3. Click **Management**
4. Click Edit next to the appropriate List (this button will be grayed out if you are not authorized to do this function)

The screenshot shows the 'Edit Eligibility List' window in the CARIS application. The left sidebar contains a navigation tree with categories like CARIS, Waiting Lists, Archives, Beds, Eligibility Lists, Reports, and Case Transfers. The main content area is titled 'Edit Eligibility List' and contains a form with the following fields:

- List Name: Cooking Class
- Start Date: 2006-08-14
- End Date: 2006-08-14
- Minimum Participants: 2
- Maximum Participants: 6
- List Description: Test of eligibility lists.

At the bottom right of the form are 'Save' and 'Cancel' buttons.

5. Fill in the fields of the “Edit Eligibility List” window
6. Click **Save**

## Delete an Eligibility List

1. You can start in CARIS context
2. Open Eligibility List in the Navigation Tree
3. Click **Management**
4. Click **Delete** next to the appropriate List (this button will be greyed out if you are not authorized to do this function)
5. Click **OK** when prompted

The screenshot shows the 'Eligibility List Management' window in the CARIS application. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Eligibility List Management' and features a table with the following data:

List Name	Start Date	End Date	Min	Max	Status	Notes
Cooking Class	2006-08-14	2006-08-14	2	6	Active	

Below the table, there are 'Edit', 'Delete', and 'Complete' buttons. At the bottom right, there is an 'Add List' button. A 'Status Filter' dropdown is set to 'Active'.

## Complete an Eligibility List

Completing a List means that you are satisfied that the participation level is acceptable, and you are closing the List to further participants and proceeding with the activity or program.

1. You can start in CARIS context
2. Open Eligibility List in the Navigation Tree
3. Click **Management**
4. Click **Complete** next to the appropriate List (this button will be greyed out if you are not authorized to do this function)
5. Click **Complete List**

The screenshot shows the CARIS web application interface. On the left is a navigation tree with categories: CARIS, Waiting Lists, Archives, Beds, Eligibility Lists, Reports, Case Transfers, Organization Notes, and Utilities. The 'Eligibility Lists' category is expanded, showing 'Management' and 'Summary'. The main content area is titled 'Complete Eligibility List' and includes a 'BACK' button. Below the title is a 'Details' section with the following information:

Eligibility List Name:	Cooking Class		
Start Date:	2006-08-14	End Date:	2006-08-14
Minimum Participants:	2	Maximum Participants:	6

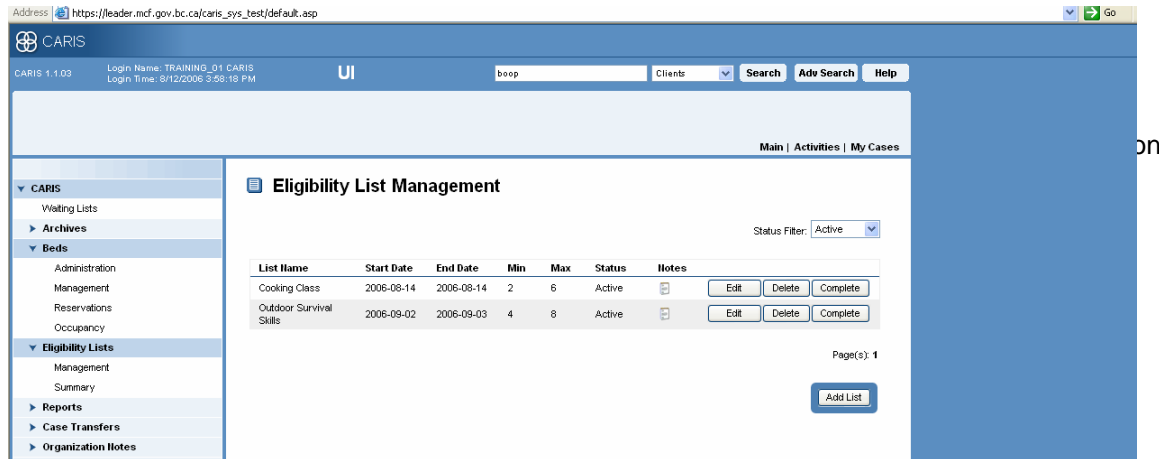
Below the details is a 'Participants' section with a table header:

Enroll	Name	Priority	Date Added
--------	------	----------	------------

At the bottom right of the participants table, it says 'Page(s): 1'. Below the table are two buttons: 'Complete List' and 'Cancel'.

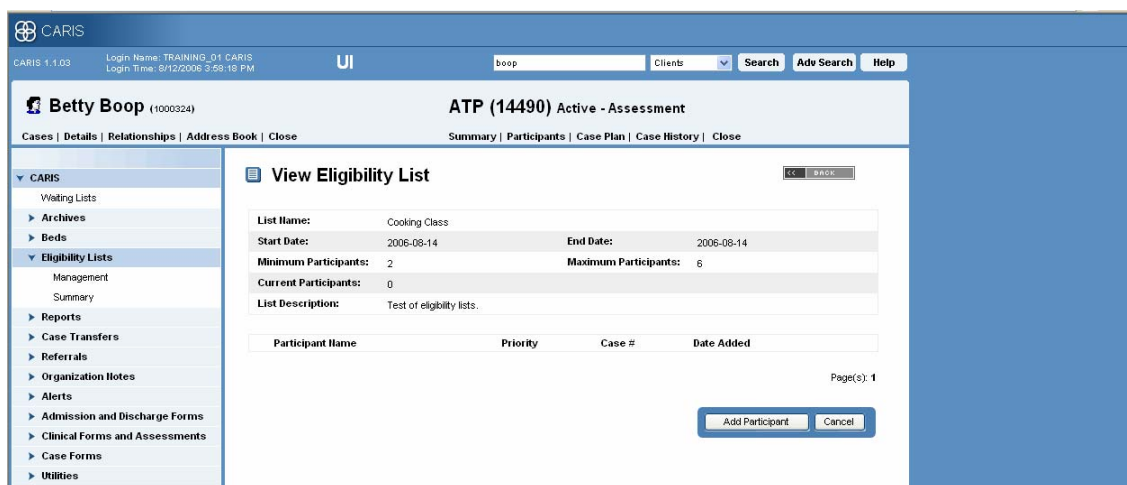
## View the Eligibility List Summary Window

The Summary displays all the Lists that are either “Active” or “Completed”, depending on the Status Filter selection.



## Add Participant to an Eligibility List

1. You must start in Client/Case context
2. Open Eligibility List in the Navigation Tree
3. Click **Summary**
4. Click **View** next to the appropriate List (you can also click on the Notes icon to obtain more information without moving to another window)
5. Click **Add Participant**



6. In the “Add Participant” window, you will have a choice to add the Client or another participant in the case. Note: they have to be added as case participants before their names will show in this drop down list.
7. Choose the priority from the drop down list
8. Click **Save**

CARIS 1.1.03 Login Name: TRAINING\_01 CARIS Login Time: 8/12/2006 3:55:18 PM UI boop Clients Search Adv Search Help

**Betty Boop** (1000324) **ATP (14490) Active - Assessment**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Add Participant** CC BACK

Eligibility List: Cooking Class Max Participants: 8

Participant: Boop, Betty B. Priority: 1

Save Cancel

## To Remove a Participant from an Eligibility List

1. You must start in Client/Case context
2. Open Eligibility List in the Navigation Tree
3. Click **Summary**
4. Click **View** next to the appropriate List (you can also click on the Notes icon to obtain more information without moving to another window)
5. Click **Delete**

CARIS 1.1.03 Login Name: TRAINING\_01 CARIS Login Time: 8/12/2006 3:55:18 PM UI boop Clients Search Adv Search Help

**Betty Boop** (1000324) **ATP (14490) Active - Assessment**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**View Eligibility List** CC BACK

List Name: Outdoor Survival Skills

Start Date: 2006-09-02 End Date: 2006-09-03

Minimum Participants: 4 Maximum Participants: 8

Current Participants: 1

List Description: Outdoor survival skills will be taught.

Participant Name	Priority	Case #	Date Added
1 Boop, Betty B.	1	14490	2006-08-12

Edit Delete

Page(s): 1

Add Participant Cancel

**Exercise 1**

1. Create an event to help Republic members to increase their resistance to the Dark Side. Jedi meditation techniques will be taught.
  - a. Event date is January 23, 2007
  - b. Min. 2 participants and maximum of 3 participants
  - c. Add your fictitious character to the event with a # 1 priority

**Learning Checkpoint**

1. What is an Eligibility List?  
\_\_\_\_\_
2. How do you add a client to an Eligibility List?  
\_\_\_\_\_  
\_\_\_\_\_

## Module 13: 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**.

The screenshot shows the CARIS software interface. At the top, there's a header with 'CARIS 1.1.03', login information, and navigation buttons like 'Search', 'Adv Search', and 'Help'. Below this is a case context for 'Harold Potter (1000127)' with 'ATP (14358) Pre-Admit'. The left navigation tree is expanded to 'Beds', and 'Reservations' is highlighted with a circle. The main content area is titled 'Bed Reservations' and contains a table with columns: Bed Name, Client, Start Date, Time, End Date, Time, and Duration. Below the table is a 'Search Bed Availability' button. The page number 'Page(s): 1' is also visible.

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

CARIS 1.1.03 Login Name: TRAINING\_01 CARIS Login Time: 8/12/2006 3:08:45 PM UI hary Clients Search Adv Search Help

Harold Potter (1000127) ATP (14358) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Search Bed Availability**

Start Date: 2006-08-12 Minimum Duration: 1

Search Cancel

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

CARIS 1.1.03 Login Name: TRAINING\_01 CARIS Login Time: 8/12/2006 3:08:45 PM UI hary Clients Search Adv Search Help

Harold Potter (1000127) ATP (14358) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Reservation Availability**

Name	Bed Status	Bed Type	Bed Gender	Availability Start	Duration
Test Unit / Room 1 / Bed 1	Active	Regular	Any	2006-Aug-12	360

Select

Page(s) 1

Search Again Cancel

7. The “Create Reservation” window will display.

8. Select the “Start Date” and enter the “Duration”.

9. Click **Save Reservation**.

CARIS 1.1.03 Login Name: TRAINING\_01 CARIS Login Time: 8/12/2006 3:08:45 PM UI hary Clients Search Adv Search Help

Harold Potter (1000127) ATP (14358) Pre-Admit

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Create Reservation**

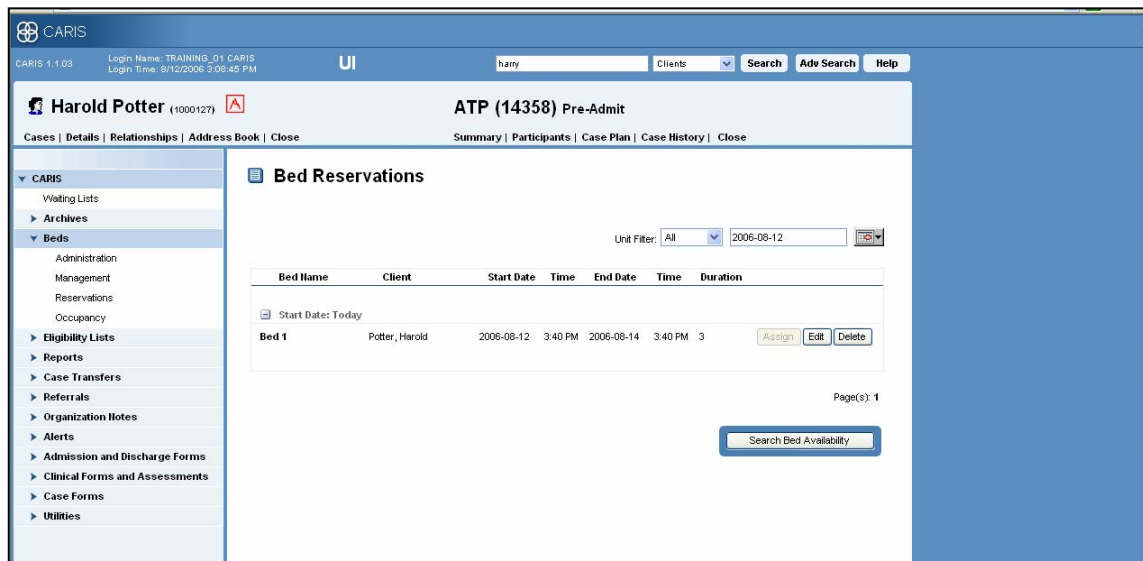
Name: Test Unit / Room 1 / Bed 1

Start Date: 8/12/2006 Start Time: 3:40 PM

Duration: 1 End Date: 08/13/2006 End Time: 3:40 PM

Assign to Bed Save Reservation Cancel





The screenshot shows the CARIS ATP (14358) Pre-Admit interface. The left sidebar contains a navigation menu with options like Waiting Lists, Archives, Beds, Eligibility Lists, Reports, Case Transfers, Referrals, Organization Notes, Alerts, Admission and Discharge Forms, Clinical Forms and Assessments, Case Forms, and Utilities. The main content area is titled 'Bed Reservations' and displays a table of reservations. The table has columns for Bed Name, Client, Start Date, Time, End Date, Time, and Duration. A single reservation is listed for 'Bed 1' for 'Potter, Harold' from 2006-08-12 3:40 PM to 2006-08-14 3:40 PM, with a duration of 3. Below the table are buttons for 'Assign', 'Edit', and 'Delete'. A 'Search Bed Availability' button is also present at the bottom right of the table area.

Bed Name	Client	Start Date	Time	End Date	Time	Duration
Bed 1	Potter, Harold	2006-08-12	3:40 PM	2006-08-14	3:40 PM	3



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.

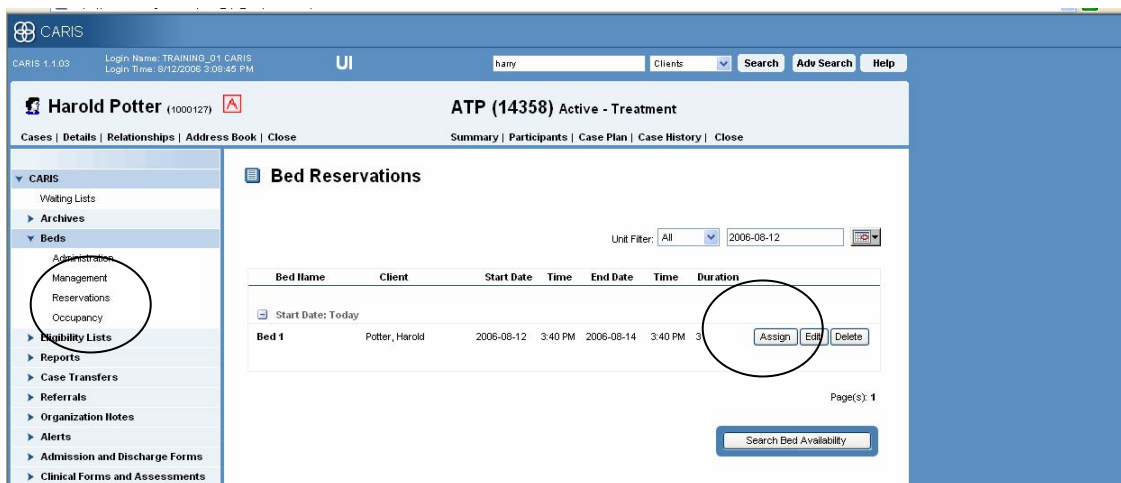
## Exercise 1

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

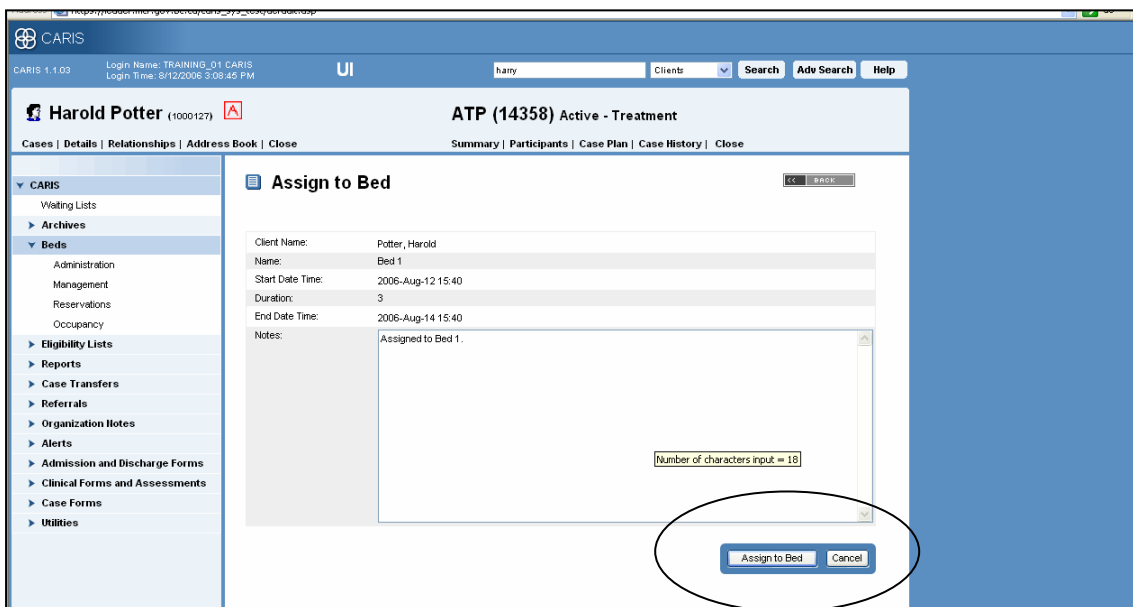
## Assign to a Bed

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**.

The screenshot shows the CARIS web application interface. The top navigation bar includes the CARIS logo, version 1.1.03, login information for 'TRAINING\_01 CARIS', and a search bar. The main header displays the client's name 'Betty Boop (1000324)' and the assessment type 'ATP (14490) Active - Assessment'. The left sidebar contains a navigation tree with categories like 'CARIS', 'Waiting Lists', 'Archives', 'Beds', 'Eligibility Lists', 'Reports', and 'Case Transfers'. The 'Beds' category is expanded, showing sub-items like 'Administration', 'Management', 'Reservations', and 'Occupancy'. The 'Occupancy' sub-item is selected, displaying a table of bed occupancy data. The table has columns for 'Bed Name', 'Client Name', 'Client Status', 'Bed Status', and 'Days Left'. A single row is visible for 'Test Unit / Room 1 / Bed 1' assigned to 'Boop, Betty B.' with a status of 'In Bed' and 'Active', and '1' day left. A 'View' button is located next to the row. The bottom right corner indicates 'Page(s): 1'.

Bed Name	Client Name	Client Status	Bed Status	Days Left
Test Unit / Room 1 / Bed 1	Boop, Betty B.	In Bed	Active	1

## Exercise 2

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.

**Betty Boop** (1000324) **ATP (14490) Active - Assessment**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Bed Details**

<b>Bed</b>			
Name:	Bed 1	Type:	Regular
Gender:	Any	Status:	Active
Notes:	...		
<b>Occupant</b>			
Client Name:	Boop, Betty B.	Occupancy Date:	2006-Aug-12 16:03
Client Gender:	Female	Est. Vacancy Date:	2006-Aug-13 16:00
Client Status:	In Bed	Related Case Number:	14490
Notes:			

Reserve this Bed Remove Client Relocate Client Edit Client Status

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

**Apple Fritter** (1000561) **Bifrost (23423) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Remove Client**

Name:	Window 1		
Client Name:	Fritter, Apple A		
Removal Date:	2006-08-28		

Remove Client Cancel

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

The screenshot shows the 'Relocate Client' form for client Apple Fritter (1000561). The form is titled 'Bifrost (23423) Active'. The left sidebar contains a navigation menu with options: CARIS, Waiting Lists, Archives, Beds (selected), Administration, Management, Reservations, Occupancy, Reports, Referrals, and Organization Notes. The main content area has a 'Relocate Client' header with a 'BACK' button. Below the header, there are two sections: 'Source' and 'Destination'. The 'Source' section shows 'Kamloops/Orange Room/Window 1 (A) - Fritter, Apple A (female)'. The 'Destination' section has three radio button options: '[MOVE] The Maples Unit / Autumn Room / Bed A (Any)' (selected), '[MOVE] Response / Blue / John (Male)', and '[MOVE] Response / Blue / comfortable (Any)'. At the bottom right, there are two buttons: 'Relocate Client' and 'Cancel'.

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

The screenshot shows the 'Edit Client Status' form for client Apple Fritter (1000561). The form is titled 'Bifrost (23423) Active'. The left sidebar contains a navigation menu with options: CARIS, Waiting Lists, Archives, Beds (selected), Administration, Management, Reservations, Occupancy, Reports, Referrals, and Organization Notes. The main content area has an 'Edit Client Status' header with a 'BACK' button. Below the header, there are two sections: 'Name' and 'Client Status'. The 'Name' section shows 'Window 1'. The 'Client Status' section has a dropdown menu with options: 'In Bed' (selected), 'Awol', 'Illness', 'On Leave', and 'Suspension'. At the bottom right, there are two buttons: 'Edit Client Status' and 'Cancel'.

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

The screenshot shows the 'Bed Occupancy' page for client Betty Boop (1000324). The page is titled 'ATP (14490) Active - Assessment'. The left sidebar contains a navigation menu with options: CARIS, Waiting Lists, Archives, Beds (selected), Administration, Management, Reservations, Occupancy, Eligibility Lists, Reports, and Case Transfers. The main content area has a 'Bed Occupancy' header with a 'Unit Filter' dropdown set to 'All'. Below the header, there is a table with the following columns: 'Bed Name', 'Client Name', 'Client Status', 'Bed Status', and 'Days Left'. The table contains one row: 'Test Unit / Room 1 / Bed 1', 'Boop, Betty B.', 'In Bed', 'Active', and '1'. There is a 'View' button next to the 'Days Left' column. At the bottom right, there is a 'Page(s): 1' indicator.



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.

**Apple Fritter** {1000561} **Bifrost (23423) Active**

Cases | Details | Relationships | Address Book | Close Summary | Participants | Case Plan | Case History | Close

**Bed Administration**

Status Filter: All Unit Filter: All Add Unit

Unit	Rooms	Beds	Status	Actions
<b>The Maples Unit</b> (Bifrost, Crossroads Residential, Dala Residential, Response Residential)	<b>Autumn Room</b> (Active) <ul style="list-style-type: none"> <li><b>Bed A</b> (Regular, Any, Active)</li> <li>Charles (Active)</li> <li>Response 2 (Active)</li> <li>Dala (Active)</li> <li>Summer Room (Deleted)</li> </ul>	Edit Add Room Edit Add Bed Edit Add Bed Edit Add Bed Edit Add Bed		
<b>Residential Unit</b> (Crossroads Residential, Dala Residential, Response Residential)		Edit Add Room		

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

**Betty Boop (1000324)** **Bifrost (14917) Pre-Admit**

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Case History | Close

### Reservation Availability

Name	Bed Status	Bed Type	Bed Gender	Availability Start	Duration
Sole Unit / Sea Breeze Room / Bed 1C	Active	Regular	Any	2006-Aug-13	367
Sole Unit / Sea Mist Room / Bed A2	Active	Special Needs	Any	2006-Aug-13	367
Sole Unit / Beach Room / Bed 2A	Inactive	Regular	Any	2006-Aug-13	367
Sole Unit / Beach Room / Bed A3	Active	Special Needs	Any	2006-Aug-13	367
Sole Unit / Sea Breeze Room / Bed 1A	Active	Regular	Female	2006-Aug-13	367
Sole Unit / Sea Mist Room / Bed A3	Active	Special Needs	Female	2006-Aug-13	367
Sole Unit / Sea Mist Room / Bed A4	Active	Special Needs	Female	2006-Aug-13	367
Sole Unit / Sea Mist Room / Test Bed	Active	Special Needs	Female	2006-Aug-13	367
Sole Unit / Sea Breeze Room / Bed 1B	Active	Regular	Any	2006-Aug-13	367
Sole Unit / Beach Room / Bed BD	Active	Regular	Any	2006-Aug-13	367

Page(s): 1

Search Again Cancel

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

**Apple Fritter (1000561)** **Bifrost (23423) Active**

Cases | Details | Relationships | Address Book | Close

Summary | Participants | Case Plan | Case History | Close

### Edit Bed

Name: Bed 1

Gender: Female

Status: Active

Type: Active

Notes:

Save Cancel

**Exercise 3**

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 14: 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 forms can be found from the Navigation Tree under Reports. The current list of reports includes the following:

1. CARIS Usage Report
2. Case Load Report (by Case Types)
3. Case Load Report (by Members)
4. Case Load Snapshot Report (by Case Types)
5. Case Load Snapshot Report (by Members)
6. Bed Utilization Report
7. Waiting List Duration
8. Case Notes Report
9. Case Face Sheet
10. Alerts Report

These reports can be accessed in CARIS context.

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 sometimes be exported to Word by clicking **Export Word**.

Some report filter examples are listed in the accompanying table.

<b>Report</b>	<b>Filters</b>
CARIS Usage Report	Start Date, Period 1 and Period 2 dates
Case Load Report (by Case Types)	Start Date, End Date, Case Type, Include Client List (Y/N, Current Phase or Phase History)
Case Load Report (by Members)	Start Date, End Date, Case Member, Include Client List (Y/N, Current Phase or Phase History)*
Case Load Snapshot Report (by Case Types)	Date, Program
Case Load Snapshot Report (by Members)	Date, Member
Bed Utilization Report	Unit, Start Date, End Date

\* Current phase: client details at the current phase of client service; phase history: client details for all phases of client service

## 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.

Face Sheet Section	Include
Client Information:	<input checked="" type="checkbox"/>
Case Information:	<input type="checkbox"/>
Extended Demographics:	<input type="checkbox"/>
Address Book:	<input type="checkbox"/>
Relationships:	<input type="checkbox"/>
Legal Order:	<input type="checkbox"/>
Diagnostics:	<input type="checkbox"/>
Case List:	<input type="checkbox"/>
Case Participation:	<input type="checkbox"/>
Goals and Objectives:	<input type="checkbox"/>
Discharge Information:	<input type="checkbox"/>
Include Signature Lines:	<input type="checkbox"/>

Generate Report Cancel

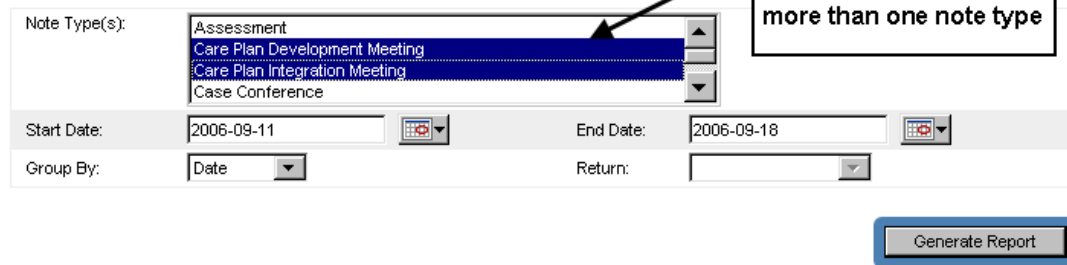


**Case Face Sheet:** The tick boxes allow you to choose the content for this report. When the report display, you can reorder the content by dragging and dropping the sections. Print by clicking **Export to PDF**. (There is no option to Export to Word because Word documents can be easily edited.)

	Case Face Sheet Report (11/0)	2006-09-18
Confidential		
		
<b>Case Face Sheet Report</b>		
Org: MATC Report Date: 2006-09-18	Program: Crossroads Residential Generated By: TRAINING_10 CARIS	
Client Number: 1000612 Client Name: Scaramanga, John Birth Date: 1993-05-11 Alert(s): NO	Ext Client ID(s): N/A A.K.A: Man with the Golden Gun Gender: Male	
<b>Case Information</b>		
Case Type: Crossroads Residential Referral Source: YFPS Referral Date: 2006-09-01 Admitted Date: 2006-09-11 Case Closed Date: -- Referral Reason: Violent	Case ID: 28562 Referral Type: Transfer Accept/Reject Date: 2006-09-11 Discharge Date: -- External Case ID: --	
<b>Extended Demographics</b>		
Status in Canada: Permanent Residency Ethno-cultural Background: British Preferred Language: English Lang Spoken at Home: English Religious Practice: No Religion Aboriginal Origin: Non-aboriginal Reservation Status: -- Band Status No.: -- Status Registration Number: -- Disability: None Country of Birth: Hong Kong	Employment Status: Unknown Education Level: No Formal Schooling Education Type: Unknown Primary Living Arrangement: Unknown Household Composition: Lives Alone Dental Plan: -- PEN: -- PHN: 6547839546 SIN Number: 123654789 Guardianship Status: Self	
<b>Physical Characteristics</b>		
Height (cm.): -- Eye Colour: -- Identifying Marks: three nipples	Weight (kg.): -- Natural Hair Colour: --	
<b>Legal Order(s)</b>		
Legal Status: Probation	Start Date: 2006-09-12	End Date: 2006-09-12
Criminal Code Description: CRIMINAL CODE OF CANADA, Section 334: Theft over \$5000	Date: 2006-09-12	
Court Date: 2006-09-12	Court Location:	
<b>DSM-IV (TR) Diagnostics Classification</b>		
Code: 347	Description: Narcodipsy	Date: 2006-09-12
	n/a	2006-09-12
	n/a	2006-09-12
MATC	John, Scaramanga (1000612)	TRAINING_10 CARIS
Page 1 of 3		

## Case Notes Report

### Case Notes Report



The screenshot shows the 'Case Notes Report' form. It includes a 'Note Type(s):' dropdown menu with a list of note types: 'Assessment', 'Care Plan Development Meeting', 'Care Plan Integration Meeting', and 'Case Conference'. The 'Care Plan Development Meeting' and 'Care Plan Integration Meeting' are highlighted in blue. A callout box with an arrow pointing to the list contains the text: 'Use <shift> click or <ctrl> click to select more than one note type'. Below the dropdown are fields for 'Start Date:' (2006-09-11), 'End Date:' (2006-09-18), 'Group By:' (Date), and 'Return:'. A 'Generate Report' button is located at the bottom right.



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 Load Report

Case Load Reports have different filters. An example of one of the case load report is the Snapshot Report:

### Case Load Snapshot Report Results

[<< BACK](#)
[Export PDF](#)


### Case Load Snapshot Report (By Case Type)

**Report Name:** Case Load Snapshot Report

**Report Level:** Case Type

**Report Period:** ~ 2006-09-18

**Report Date:** 2006-09-18

**Reported By:** TRAINING\_10 CARIS

**Location:** MATC

Total by Case Phase							
Program	Referral	Pre Admit	Active	Followup	Closed	Total	
Community Outreach	2	4	2	3	3	14	
<b>Total by Case Phase</b>	<b>2</b>	<b>4</b>	<b>2</b>	<b>3</b>	<b>3</b>	<b>14</b>	

Total by Age											
Gender	< 10	11-14	15-18	19-24	25-45	46-54	55-64	65-75	75+	No Birthday	Total
Female	1	0	1	1	0	1	0	0	0	0	4
Male	3	1	2	0	1	1	0	0	1	0	9
<b>Total by Age</b>	<b>4</b>	<b>1</b>	<b>3</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>13</b>

Statistics	
# of Distinct Clients Served	13
Average Cases per Client	1.08
Female (%)	4( 30.77%)
Male (%)	9( 69.23%)

**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?

---

---

## Module 15: Archives

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

1. Access the documentation on archived records
2. Create a new accession
3. Create a new box for an accession
4. Add a client to a box
5. Delete a client from a box and a box from an accession
6. Delete an accession

### Create an Accession

To create an accession:

1. Open Archives in the Navigation Tree and then Administration.
2. Click **Create New Accession**.

The screenshot displays the CARIS MATC interface. The top navigation bar includes the CARIS logo, version 1.1.02, login information for TRAINING\_01 CARIS, and the MATC title. The user is logged in as Harold Potter (1000127). The main content area shows the 'Archive Records List' for Harold Potter (13398) Active. The list includes two accessions: 18922A (MATC) and 8998AC (MAC). Each accession has a table of boxes with columns for Box number, Status, Date, and Actions (Add Client, Delete, Close). A 'Create New Accession' button is visible at the bottom right.

Accession number	Location	Box	Status	Date	Actions
18922A	MATC	Box: 12991box	In-Progress	2006-08-10	Add Client, Delete, Close
		Box: 12992	Closed	2006-08-10	Add Client, Delete, Close
8998AC	MAC				Create Box, Delete

Page(s): 1

Create New Accession



3. Select "Location" from the list in the drop-down box and enter "Accession #".
4. Click **Save**.

The screenshot shows the CARIS MATC interface. The top navigation bar includes the CARIS logo, version 1.1.02, login information for 'TRAINING\_01 CARIS', and the MATC title. A search bar and buttons for 'Members', 'Search', 'Adv Search', and 'Help' are present. The user profile for 'Harold Potter (1000127)' is displayed, along with the patient 'Bifrost (13398) Active'. The left sidebar contains a menu with categories like CARIS, Archives, Beds, Reports, Referrals, and Organization Notes. The main content area is titled 'Create Accession' and features a form with the following fields: 'Schedule #' (122349), 'Date' (2006-08-11), 'Location' (MATC), and 'Accession #' (empty). 'Save' and 'Cancel' buttons are at the bottom right of the form.

5. To add a box to an accession, click **Create Box**.

The screenshot shows the CARIS MATC interface with the 'Archive Records List' view. The top navigation bar and user profile are the same as in the previous screenshot. The left sidebar is also the same. The main content area is titled 'Archive Records List' and shows a table of accessions. The table has columns for 'Accession number', 'Location', 'Status', 'Date', and actions. The first section shows 'Schedule #: 122349' with two rows of boxes: 'Box: 12991box' (In-Progress, 2006-08-10) and 'Box: 12992' (Closed, 2006-08-10). The second section shows 'Accession number: 8998AC' (Location: MAC). Each row has 'Add Client', 'Delete', and 'Close' buttons. A 'Create Box' button is also present for each accession. At the bottom right, there is a 'Create New Accession' button and a 'Page(s): 1' indicator.

- Enter the box number, select "Status" from the list in the drop down box, and add appropriate notes such as storage location.
- Click **Save**.

The screenshot shows the CARIS MATC interface. The user is logged in as TRAINING\_01 CARIS. The main header displays the user's name, Harold Potter, and the client name, Bifrost (13398), with an 'Active' status. The left navigation tree is expanded to 'Archives', showing sub-items like Administration, Beds, Reports, Referrals, Organization Notes, Eligibility Lists, Alerts, and Admission and Discharge Forms. The main content area is titled 'Create Box'. It contains a form with the following fields: Schedule # (122349), Accession # (18922A), Date (2006-08-11), Box # (empty), Box Status (In-Progress), and Notes (empty). There are 'Save' and 'Cancel' buttons at the bottom right of the form.

To add a client to a box, the client must be in context.

- Bring the Client into Context.
- Open Archives/Administration from the Navigation Tree.
- Click **Add Client**.

The screenshot shows the CARIS MATC interface with the 'Archive Records List' displayed. The user is logged in as TRAINING\_01 CARIS. The main header displays the user's name, Harold Potter, and the client name, Bifrost (13398), with an 'Active' status. The left navigation tree is expanded to 'Archives', showing sub-items like Administration, Beds, Reports, Referrals, Organization Notes, Eligibility Lists, Alerts, and Admission and Discharge Forms. The main content area is titled 'Archive Records List'. It shows a table of records with columns for Accession number, Location, Box, Status, Date, and Actions. The table contains two records: one for Accession number 18922A, Location MATC, Box 12991box, Status In-Progress, Date 2006-08-10, and another for Accession number 8998AC, Location MAC, Box 12992, Status Closed, Date 2006-08-10. There are 'Add Client', 'Delete', and 'Close' buttons for each record. A 'Create Box' button is also present. At the bottom right, there is a 'Create New Accession' button.

To delete a client, or a box, or an accession

1. Click the **Delete** button.



An accession cannot be deleted if there is a box still attached to the record, similarly a box cannot be deleted if there is a client still attached to the record.

Once a box has been closed, you cannot access the box again.

### Exercise 1

1. Create a new accession record (#2378A) and add a box numbered 345 to the accession.
2. Bring a client into context and add the client to the box.
3. Delete the client, the box, and the accession.

### Learning Checkpoint

1. Name the three components of an accession:

---

2. Name the available statuses for a box:

---

3. Name the available reasons for deleting a box:

---

## Module 16: Utilities

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

1. Create a template document.
1. Generate the document from the template.
2. Print the document.

There is one option under Utilities: Templates.

CARIS 1.1.08 Login Name: TRAINING\_05 CARIS Login Time: 9/8/2006 2:29:16 PM NOC rump Clients Search Adv Search Help

Main | Activities | My Cases

**Templates**

Template Name	Version	Date Created	Description				
New Template	1.0	2006-09-07		View	Delete	Deactivate	Generate Doc
Test	1	2006-09-08		View	Delete	Deactivate	Generate Doc

Page(s): 1

Create Template

## Create a Template

You need to give your template a name and a description so that you will recognize it when you want to use it to generate a document. The tag references refer to data elements in CARIS, and are similar to Merge Fields in MS Word.

1. You may begin in CARIS context.
2. Open Utilities in the Navigation Tree.
3. Click **Create Template**.
4. To add a tag reference to your document, highlight the tag and right click to copy and paste into your template (or triple left click and CTRL C to copy and CTRL V to paste in your document).
5. Click **Save**

Tag	Description	Note
#TEXTBOX#	Textbox	Blank textbox 25 characters wide
#TEXTBOX(n)#	Textbox	Blank textbox n characters wide
#SENDER_LAST_NAME#	Sender last name	
#SENDER_FIRST_NAME#	Sender first name	
#SENDER_MIDDLE_NAME#	Sender middle name	
#SENDER_DOB#	Sender date of birth	
#SENDER_GENDER#	Sender gender	
#RECEIVER_LAST_NAME#	Receiver last name	



“TEXTBOX” will give you a blank space to type 25 characters (“Textbox”). “TEXTBOX(n)” will allow you to type as many characters you wish (substitute “n” for a number: for example, “TEXTBOX(200)” will allow you to type 200 characters.)

You can create a Template in CARIS context; however to use a template, you must be in Case Context.

Templates can be seen and used by anyone at the Maples.

## Use a Template

1. To use an existing template, you must be in Case context.
2. Open Utilities in the Navigation Tree.
3. Click **Generate Doc.**

**Harold Potter** (1000127)

**Non Court Ordered Assessment (27518) Active**

Cases | Details | Relationships | Address Book | Close      Summary | Participants | Case Plan | Case History | Close

**Templates**

Template Name	Version	Date Created	Description				
New Template	1.0	2006-09-07			View	Delete	Deactivate <b>Generate Doc</b>
Test	1	2006-09-08			View	Delete	Deactivate <b>Generate Doc</b>

Page(s): 1

**Create Template**

The “Define Document” window appears, allowing you to add further information.

**Harold Potter** (1000127)

**Non Court Ordered Assessment (27518) Active**

Cases | Details | Relationships | Address Book | Close      Summary | Participants | Case Plan | Case History | Close

**Define Document** CC BACK

**Header**

Include Letterhead: ☒

Sender: **CARIS, TRAINING\_05**

Sender Address:

Sender Phone:  Sender Fax:

Sender Emails:

Receiver: **Potter, Harold**

Receiver Address: **1223 Privet Drive, Dorset, BC, X0X0X0, CA**

Receiver Phone: **(604) 369-8745** Receiver Fax: **(604) 369-8745**

Receiver Emails:

Subject:

**Body**

**2006-09-08**

Dear **Harold** ,

Hello

Yours sincerely,

**TRAINING\_05 CARIS**

**Footer**

Include Sender Signature Line: ☒ Include Receiver Signature Line: ☒

**Cancel Next>**

Certain fields will automatically fill as you select your sender and receiver

4. Fill in the appropriate fields. Some will fill in automatically.

5. Click **Next** to generate a preview of the document.
6. In the "Preview" window, you can choose to **Export to Word** or **Export to PDF**.
7. If you are not satisfied with the preview, begin at Step 1.

### **Exercise 1**

1. Create a template document that might be useful you to in the workplace.

### **Learning Checkpoint**

1. How might you use templates?
-

## **Appendices**

### **Maples Power Users**

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**Glossary**

**Survival Tips**

**Learning Checkpoint Answers**

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## 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.

<b>Activities:</b>	A record of actions taken by the user either in a general operational sense or specific to a client or case.
<b>Ad Hoc Reports:</b>	Reports prepared for a specific purpose, generally based on specific criteria.
<b>Affiliate:</b>	Someone involved with a client's case, but does not have access to the client's file. In CARIS, typically a family member, social worker, minister, police officer, or probation officer.
<b>Bed:</b>	A bed in a "Room" which may be allocated to a client.
<b>Case Report:</b>	A Case Report is an automatically generated report that summarizes the User's cases using pre-established criteria.
<b>Client:</b>	The primary person in a Case who is receiving a service.
<b>Contact:</b>	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.
<b>Context:</b>	The term "In Context" as used in this system means the Client and/or Case whose names appear in the Context Bar.
<b>Critical Date:</b>	The date upon which a particular event either did occur or should occur in the future. In a case plan, this is the review date for the action, objective, or goal
<b>End Date:</b>	The date upon which an event is scheduled to end.
<b>Member:</b>	A clinician who is a participant in a client's case and who has access to the Case File in CARIS. Only YFPS staff and contractors can be members of cases.
<b>Organization:</b>	Government or social service agencies associated with the activities and/or clients of MCFD.
<b>Partner:</b>	A Partner is an individual or a group who is working in association with a person or group in the agency.
<b>Recipient:</b>	A Recipient is an individual or a group who represent 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. The process of opening a new case for a client. Basically "New Referral" means "Start a New Case".
- Room:** A specific room in a "Unit"
- 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.
- Unit:** A "Unit" in the context of this Manual is a facility such as a house, ward, or other building containing "rooms" and "beds".

## 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
- General alerts can only be viewed in the location where they were created
- Always search CARIS first then OHW before creating a new client
- Bringing files from OHW: Merge means there is an existing client on CARIS; Copy means there is no existing client on CARIS
- 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.
- Waitlists currently appear for some organizations and not others
- Client details can be seen by anyone in CARIS
- On the Single Document Processing window, the date is the date you enter the document (today's date)
- Use Provisional Diagnoses to create a Formulation on admission (there are 3 stages of formulation)
- Use DSM-IV with a code upon discharge
- For attaching reports, the office and typist responsible for the report will attach it using Document Management Processing
- Archives – “Close” closes a box forever – don't use this function
- In Archives, when you create an accession or a box, add “location” in notes
- 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
- Don't use **Close Case** button (Power Users)
- If a client designation changes, you must start a new case.
- Remember, if you 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. Announcement, Communication Note, Safety Procedure, Topic-Based Consultation
2. CCALA Inspection, Earthquake Drill, Facility Fire Alarm Tests, Fire Alarm (false), Fire Alarm (real), Fire Department Inspection, Fire Escape Drill, Health (food) Inspection, OSH Inspection, Security Alarm, Smoke Detectors
3. Conference, Consultation, Lecture, Training/Education, Workshop
4. No

## Module 3

1. Search for the client using simple and advanced search techniques. Must also search the Online Healthware system.
2. Last name, first name, gender, date of birth.
3. Copy or merge.

## Module 4

1. (a) Client (b) Details
2. Social or Family
3. Brother, sister, friend, parent etc.

## Module 5

	Referral Phase	Pre-Admit Phase	Active Phase	Follow-up Phase
You decide not to accept the case.	X			
You are adding a progress note to the file.			X	
You have discharged the client.				X
You have decided to admit the client.		X		

## Module 6

1. Pre-Admit.
2. Admit or cancel a case.

## Module 7

1. Affiliates or members.
2. Notes
3. General or Supervision

## Module 8

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

## Module 9

1. Case Face Sheet, Meeting Minutes, Psychiatric Admission Notes, Provisional Diagnoses, Child Care/Nursing Admission Notes, Alerts
2. Initial Provisional Diagnoses Form (initial and final), Child Care/Nursing Admission Note (initial and final), Psychiatric Admission Notes.

## Module 10

1. DSM-IV (TR) Diagnostic Classifications, ICD 10, Provisional Diagnoses, Medications, Progress Notes

### **Module 11**

1. Referral Observation, Meeting and Contact Note, Progress Notes, Correspondence Log, Documents Process Management, Health Visit, Legal Order, Personal History, Presenting Issues
2. 1-1 Session, Clinical Case Conference Note, Clinical Consultation, Correspondence Log, External Meeting, Family Session, Fax Rec'd/Sent Note, General Note, GP Session Note, Group Activity Note, Group Session, ICM Meeting, Intake Meeting, Letter Rec'd/Sent Note, Medication Note, Phone Call Note

### **Module 12**

1. Activities in which participants can register.
2. Case context: Eligibility Lists / Summary / View / Add Participant

### **Module 13**

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 14**

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

### **Module 15**

1. Schedule, Accession, Box
2. In-progress, Closed
3. Duplicate