Welcome to
iMs Connexis™ Introductory Training!

May 18, 2010




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iMs Connexis™ Release

- **JUNE 18th – iMs will begin installing iMs Connexis after End of Business (COTTS will not be available beginning at 5:00 PM EST.)**

- **JUNE 21st – iMs Connexis will replace COTTS as the Case Management System**

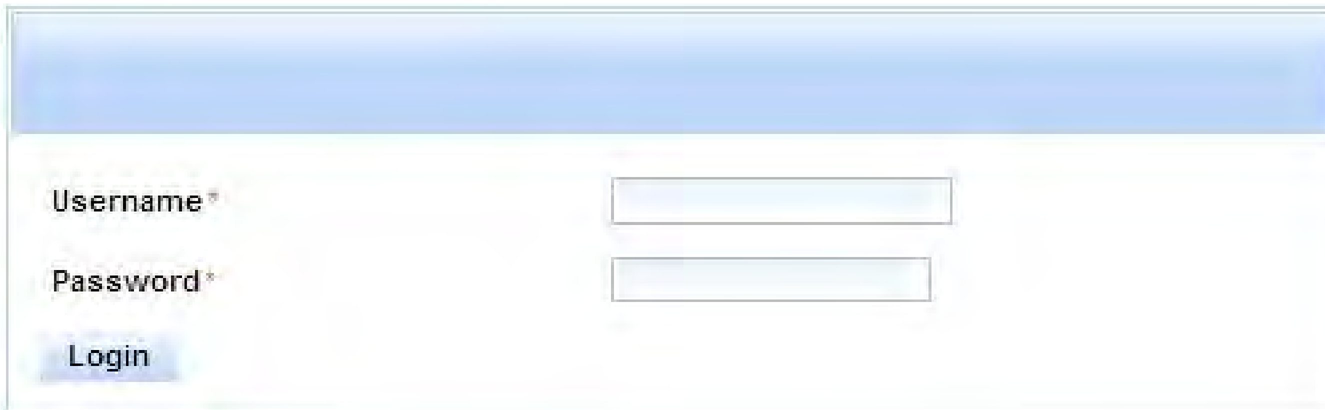
To ensure smooth transition, iMs will do the following:

- **Work with each court to develop initial setup plan for Courts and Users**
- **Will send the courts each of the following via COTTS Listserv :**
  - **New Web Address for iMs Connexis**
  - **Copy of the iMs Connexis Manual**
  - **Checklist to ensure imported data is correct**

Features in iMs Connexis™

- Advanced User Permissions
- Assessment Tools
- Advanced Activities Management
- Advanced Notes Recording
- Advanced Reporting Capabilities
- Custom Query Reporting Tool

Logging into iMs Connexis™



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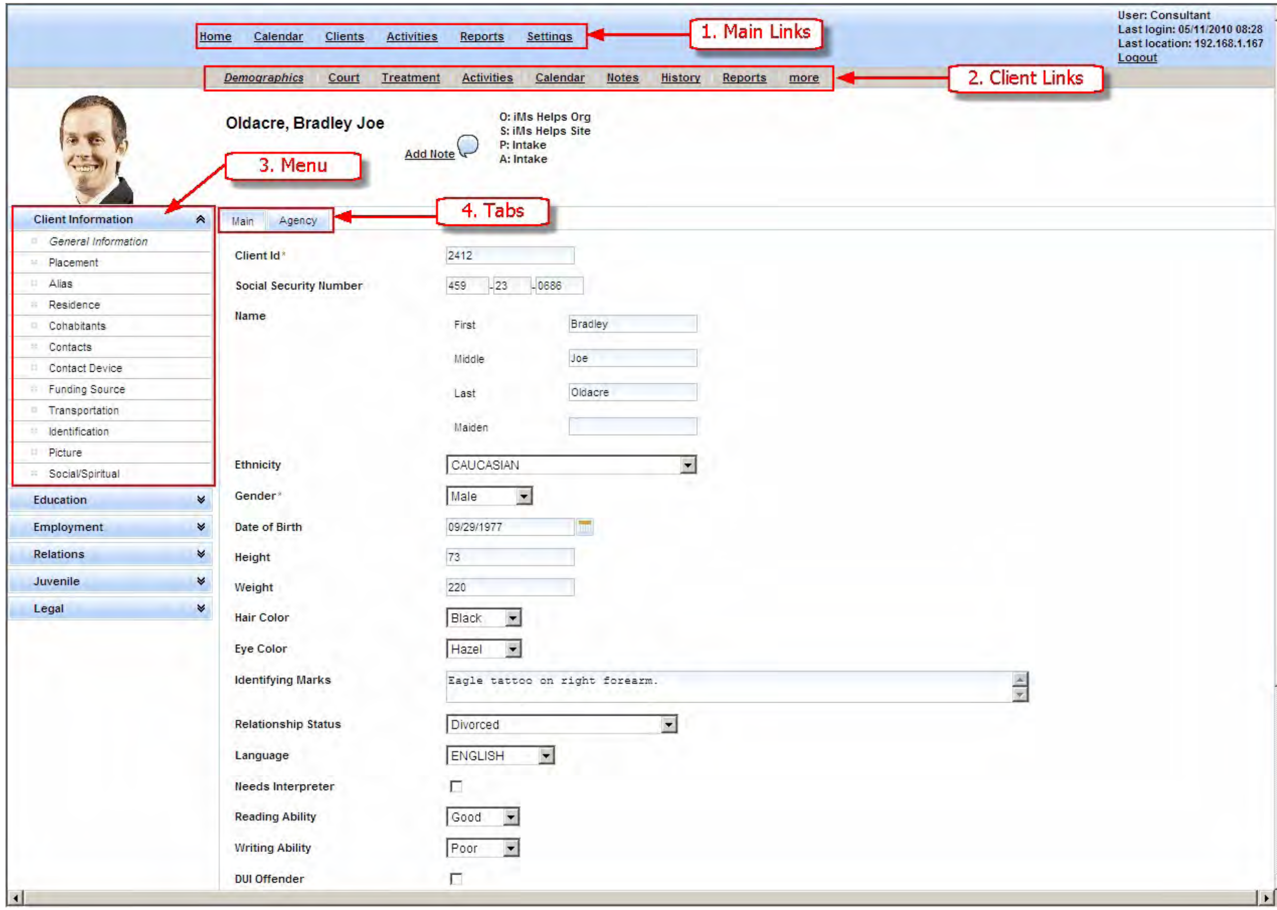
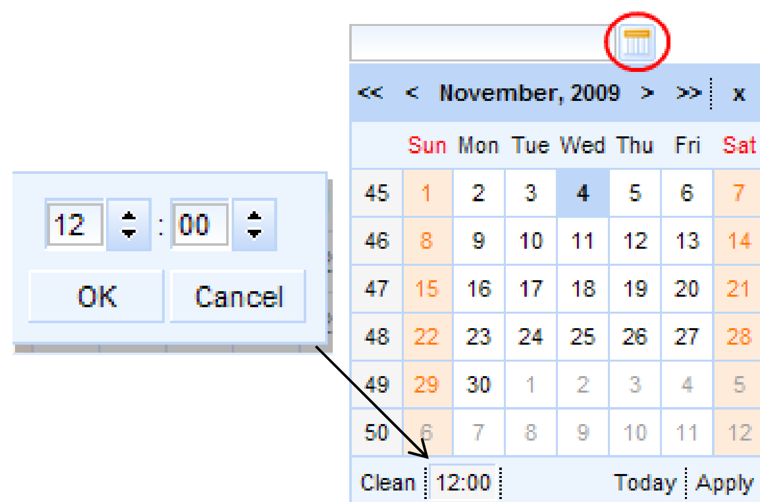
Basic Navigation Elements

1. Main Links
2. Client Links
3. Navigation Menus
4. Tabs



Basic Functions in TTS

- **“View” or [...] – Click on this link or button to open a record for viewing.**
- **Calendar Tool – All dates must be entered by using the Calendar Tool by clicking on the icon that appears to the right of the date field.**
  - **The Calendar Tool allows the user to move back or forward one month at a time by clicking on the “<“ and “>” buttons. Additionally, the user may move the date back or forward one year by selecting the “<<“ and “>>” buttons.**
  - **The user can click on the Month or year that is displayed in the top of the Calendar Tool to select the month or year from a list.**
  - **Some Date Fields also require a start time. This can be entered once the user clicks on the correct date. The user can change the time by clicking on the time in the lower portion of the calendar.**
  - **The Calendar Tool is now required for date fields to standardize data for reporting.**



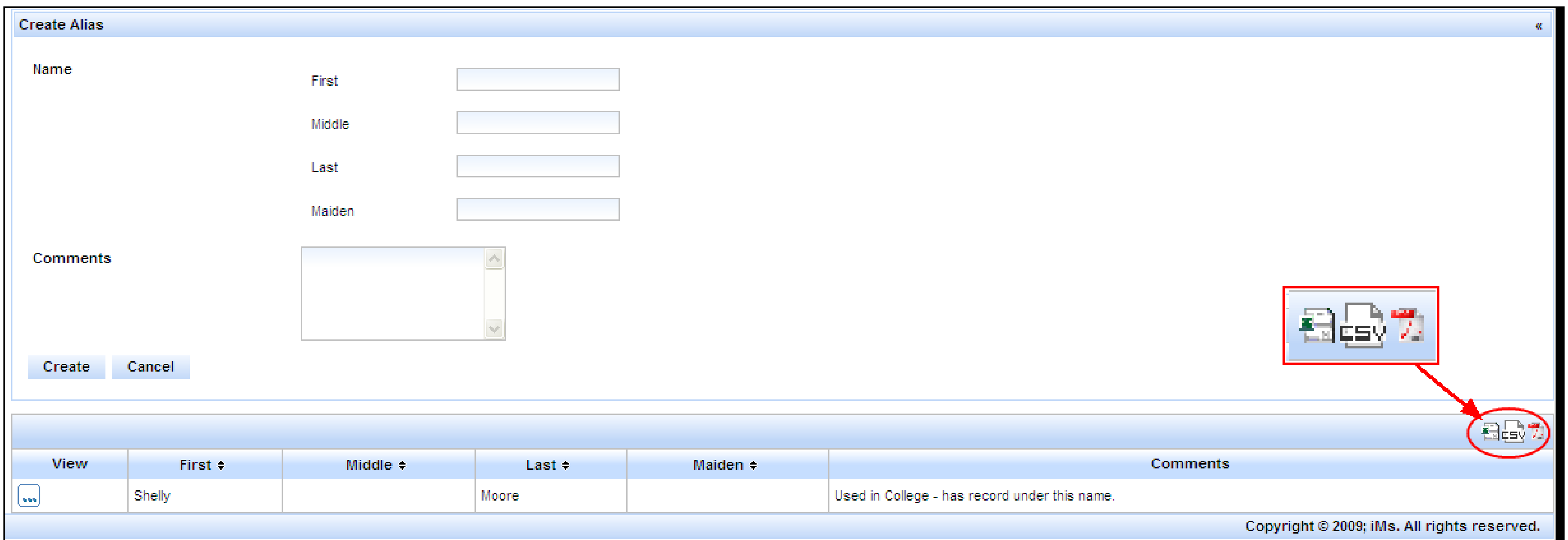
Export and Print Screens

Users can export data saved on each screen in the Clients Perspective by clicking on one of the following icons:

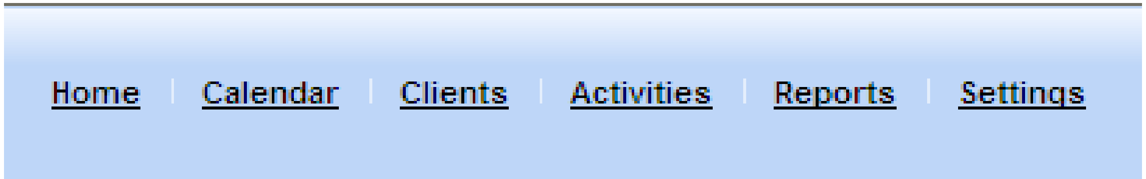
Excel Icon – Data can be exported to an Excel Spreadsheet

CSV Icon – Data can be exported to a CSV File

PDF Icon – Data can be exported to a printable Adobe PDF File

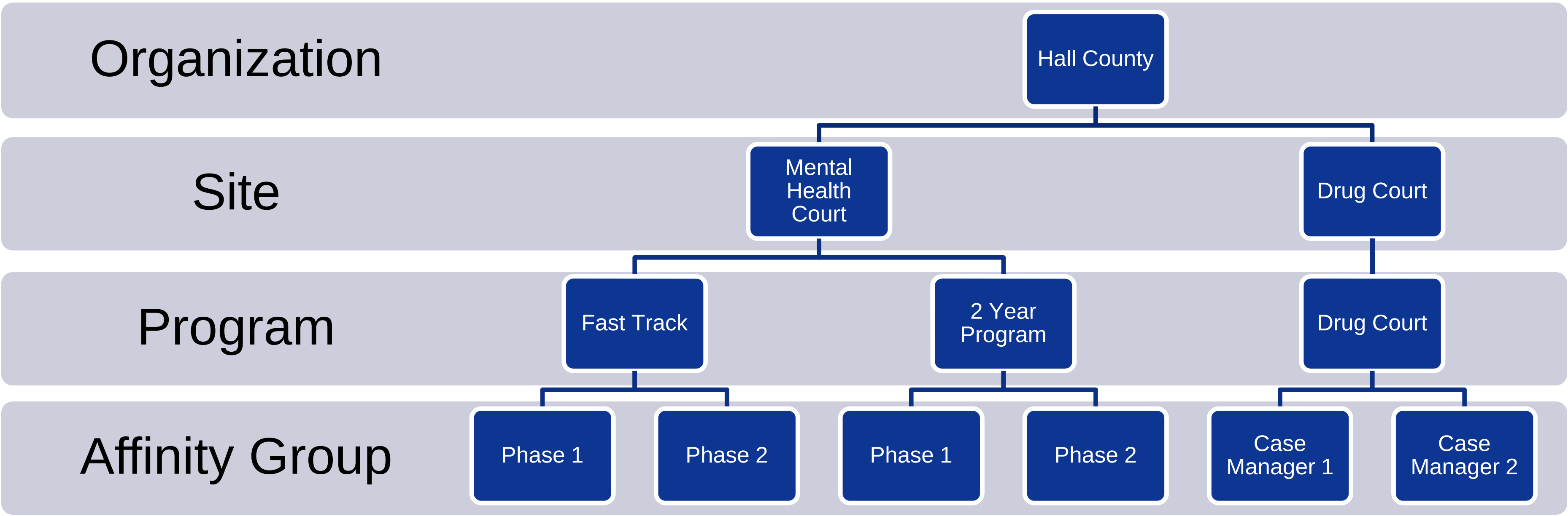


Main Links



- **Home – Displays important information information regarding the clients that the user has permissions to see**
- **Calendar – Displays important dates related to the User and the clients that the user has permissions to see**
- **Clients – Allows users to select and view Client-specific data**
- **Activities – Allows users to manage group activities**
- **Reports – Allows users to run global reports**
- **Settings – Allows users to create and manage activity schedules, drop down lists, and user settings**

Initial Setup - What's your OSPA?



Users – Each User will be assigned to one of the four OSPA levels. This will determine which clients' data the user will have permissions to view.

Clients – Each Client must be assigned to at least one OSPA placement. This will determine which users can see and generate reports that include the client's data.

Initial Setup – Users/Roles

- Over 830 permissions can be granted to User Roles
- General Roles – Coordinator, Case Manager, Treatment Provider, Judge, Surveillance Officers
- Court, Treatment, and Notes Sections filtered depending on User setup and OSPA's

Initial Setup – Assessment Tools

To Create an Assessment Tool:

1. Click on "Settings" in the Main Link Toolbar.
2. Click on the "Assessments" link located under the "Treatment" section on the Settings screen.
3. Enter the name and a description of the Assessment Tool in the provided fields.
4. Click on the "Create" button.
5. Click on the "Edit Sections" button next to the correct Assessment tool displayed in the List.
6. Enter the name and description of the Assessment Section in the provided fields.
7. Click on the "Create" button.
8. Repeat Steps 5 – 7 for each section of the Assessment Tool.

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Initial Setup – Assessment Tool Items

Edit Assessment Item for Example Assessment - Response Types «

Assessment
Example Assessment Sections

Position: 3

Prompt*: Single Selection Example:

Response Type*: Single Selection

Response Required: ☐

Count Response in Score: ☐

Responses

Action	Position	Label	Score
Remove	1	Excellent	0
Remove	2	Good	1
Remove	3	Fair	2
Remove	4	Poor	3
Add	5		0

Update Delete Revert Cancel

Initial Setup – Assessment Tool Items

To Create an Assessment Item:

1. Enter the correct position which the Item should appear in the Assessment Section
2. Enter the "Prompt" in the provided field.
3. Select the correct "Response Type" from the drop down list.
4. If applicable, select the correct check boxes to indicate whether the response is required or if it should be included in the Assessment score.
5. If applicable, create response options that should appear for the Assessment Item. (See Instructions below.)
6. After all responses are saved using the "Add" button in the "Responses" section, click on the "Create" button to save the Assessment Item.

Initial Setup – Assessment Tool Responses

To Add A Response:

1. Enter the correct position in which the response should appear.
2. Enter the "Label." The label determines exactly how a response will appear in the response list.
3. Enter a "Score" for that response option. Each score should be entered as a positive or negative integer. This score is used to determine the final score for an Assessment.
4. Click the "Add" button to save that response.

- NOTE: Responses must be saved to the list before the user clicks "Create" for an Item. Any responses that are not saved to the Response list WILL NOT appear as a response option for that Assessment Item.

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Initial Setup - Schedule an Activity

Edit Activity Schedule

Site*	iMs Helps Site
Name*	Phase 1 - M/W/F
Location	
Instructor*	Consultant
Max Enrollment	
Start Date/Time	04/25/2010 08:00
End Date	
Duration (minutes)*	60
Recurrence Type*	Every Mon., Wed., and Fri.
Recurrence Interval*	1
Fee for Enrollment	
Fee if Present	
Fee if Absent	
Fee if Excused	

Update Delete Revert Cancel

View	Site	Name	Location	Instructor	Recurrence Type	Max Enrollment	Fee for Enrollment	Fee if Present	Fee if Absent	Fee if Excused
...	iMs Helps Site	Phase 1 - M/W/F		Consultant	Every Mon., Wed., and Fri.					
...	iMs Helps Site	Phase 1 - T/TH		Consultant	Every Tues. and Thurs.					

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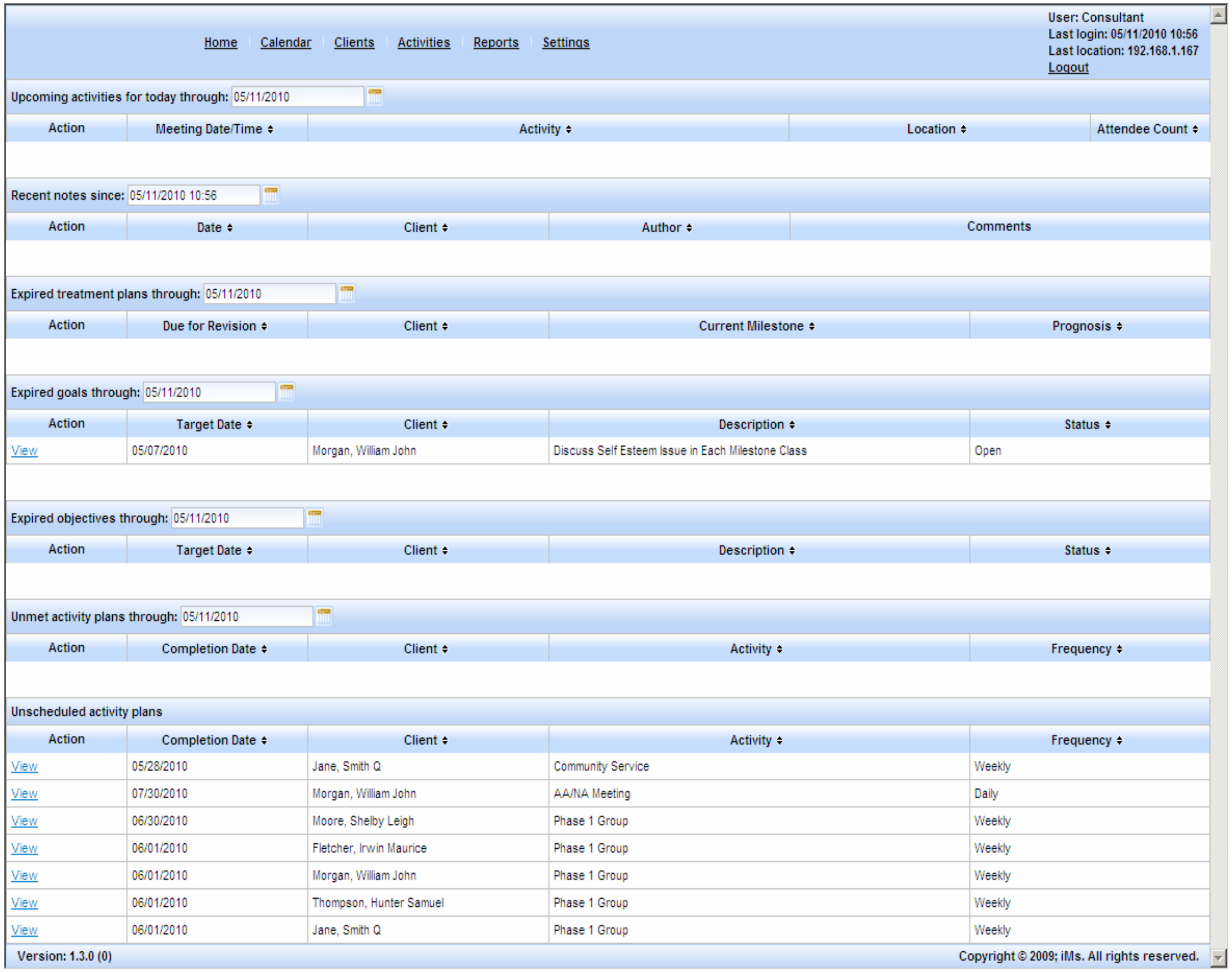
1. **Click on the "View Schedule" button for the correct Activity.**
2. **Enter info in Required fields.**
3. **Indicate how the activity will recur and in what intervals it will recur.**
4. **Select the days on which the activity should be scheduled.**

****The user may select "Ad Hoc" from the Recurs drop down list if the activity does not have a specific schedule. (Example: AA / NA Meetings)**

Home Dashboard

The Home Dashboard allows the user to view information regarding the following:

- **Upcoming activities assigned to the user**
- **Recent Notes added for the user's clients**
- **Expired Treatment Plans**
- **Expired Goals**
- **Expired Objectives**
- **Expire Activity Plans**



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Clients Perspective - Search

Home | Calendar | Clients | Activities | Reports | Settings

User: Consultant
Last login: 05/11/2010 10:56
Last location: 192.168.1.167
Logout

Client Search «

Last Name

First Name

SSN - -

Client Id

Include Sealed Clients in Search

Include Archived Clients in Search

Search

Matching Clients

Action	Client Id	Last Name	First Name	SSN	Unseal	Restore
View	8457987	DiMaggio	Norma	--		
View	123	Doe	John	123-12-1234		
View	DOC163527	Fletcher	Irwin	845-45-8789		
View	3333	Guy	Mister	111-11-1111		
View	111	Jane	Smith	111-11-1111		
View	3958276	Jones	Larry	658-12-4568		
View	36549	Juarez	Stephen	998-45-8239		
View	2020202	Moore	Shelby	333-44-3333		
View	IMS04282010	Morgan	William	354-45-4635		
View	2412	Oldacre	Bradley	459-23-0686		
View	444	Smith	James	--		
View	35814	Thompson	Hunter	421-56-7834		

«« « » »»

Create Client

Version: 1.3.0 (0)

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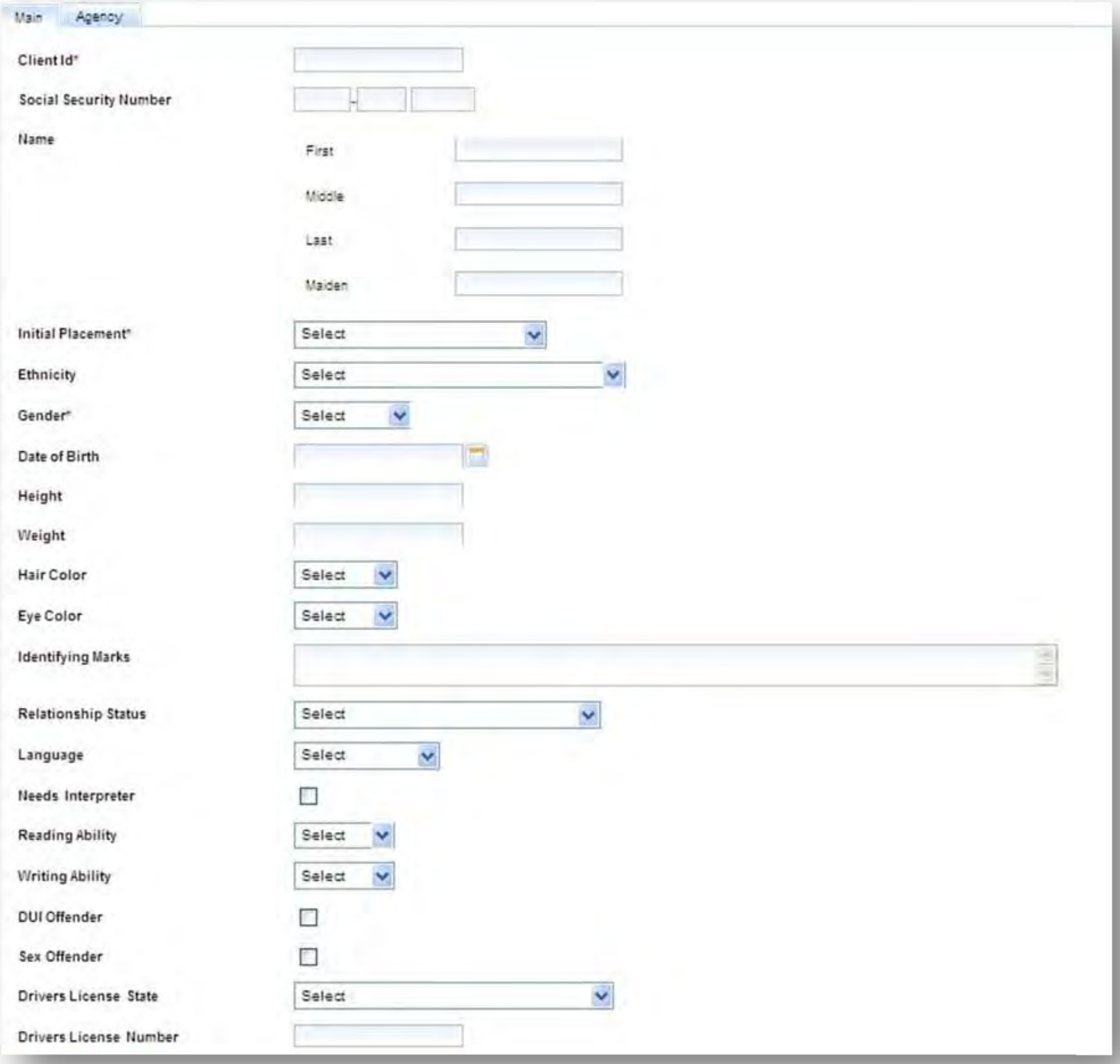
Create a Client

To Create a Client:

1. Select the “Create a Client” button on the Clients Search Screen.
2. Enter required data in the provided fields.
3. Select an Initial Site Placement for the client.
4. Click the “Create” button



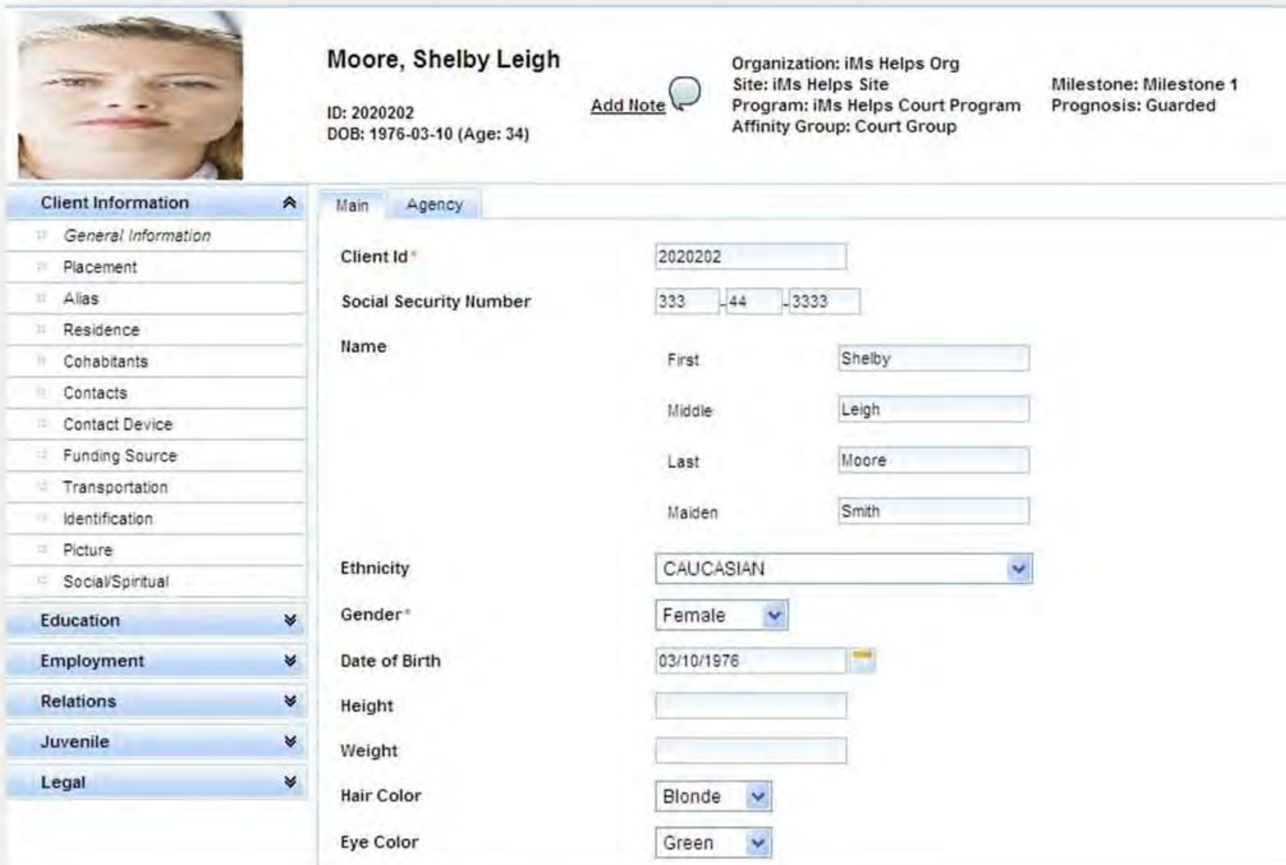
Clients - Create a Placement

- The user should update the Client's Placement to include the correct Program and Affinity Group as soon as it is known.
- Clients can be assigned to multiple placements at a time.

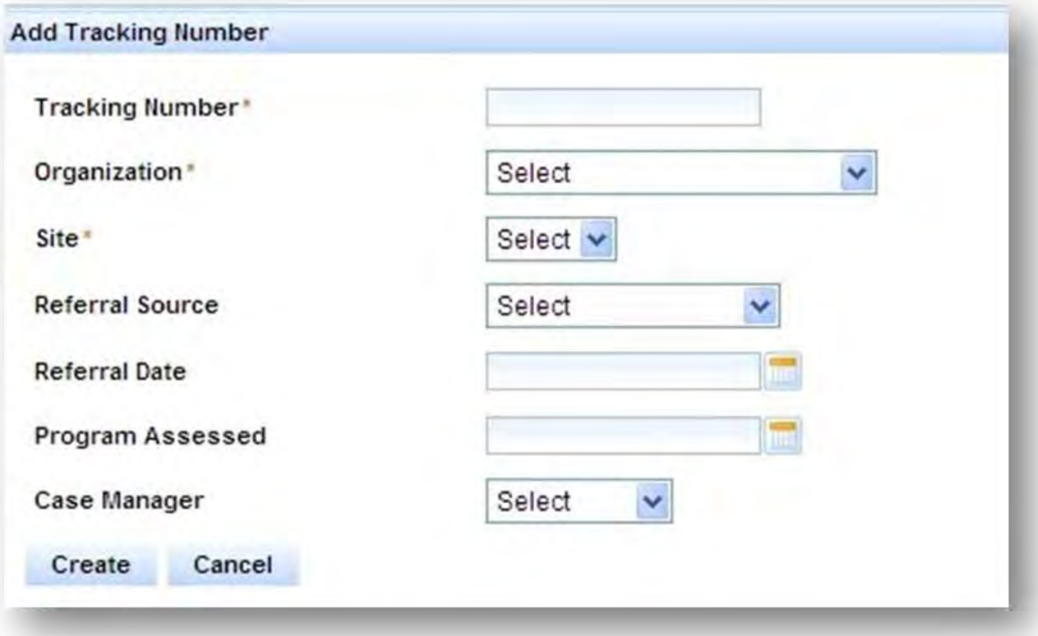
Clients – Important Demographics Screens

Important Screens available in the Demographics Section of the Clients Perspective:

- Placement
- Residence
- Pictures
- Education
- Employment
- Relations
- Juvenile
- Legal History
- Incarceration



Clients – Create a Tracking Number



<u>**To Create a Tracking Number:**</u>

1. **Select the "Add a Tracking Number" link on the Court Dashboard.**

2. **Enter required data in the provided fields.**

3. **Select the correct Organization and Site associated with the Clients' Tracking Number.**

4. **Click the "Create" button**

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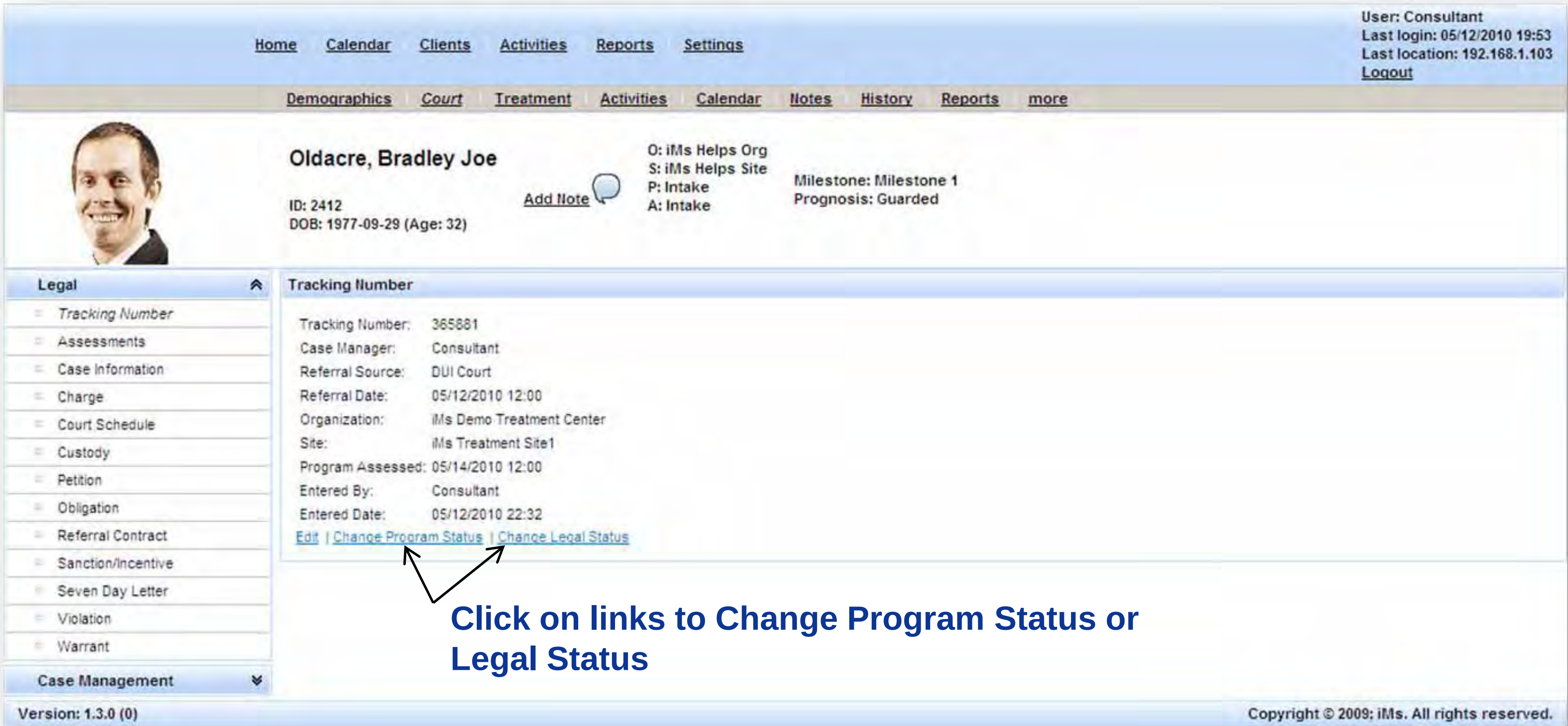
Clients – Change Client's Program Status

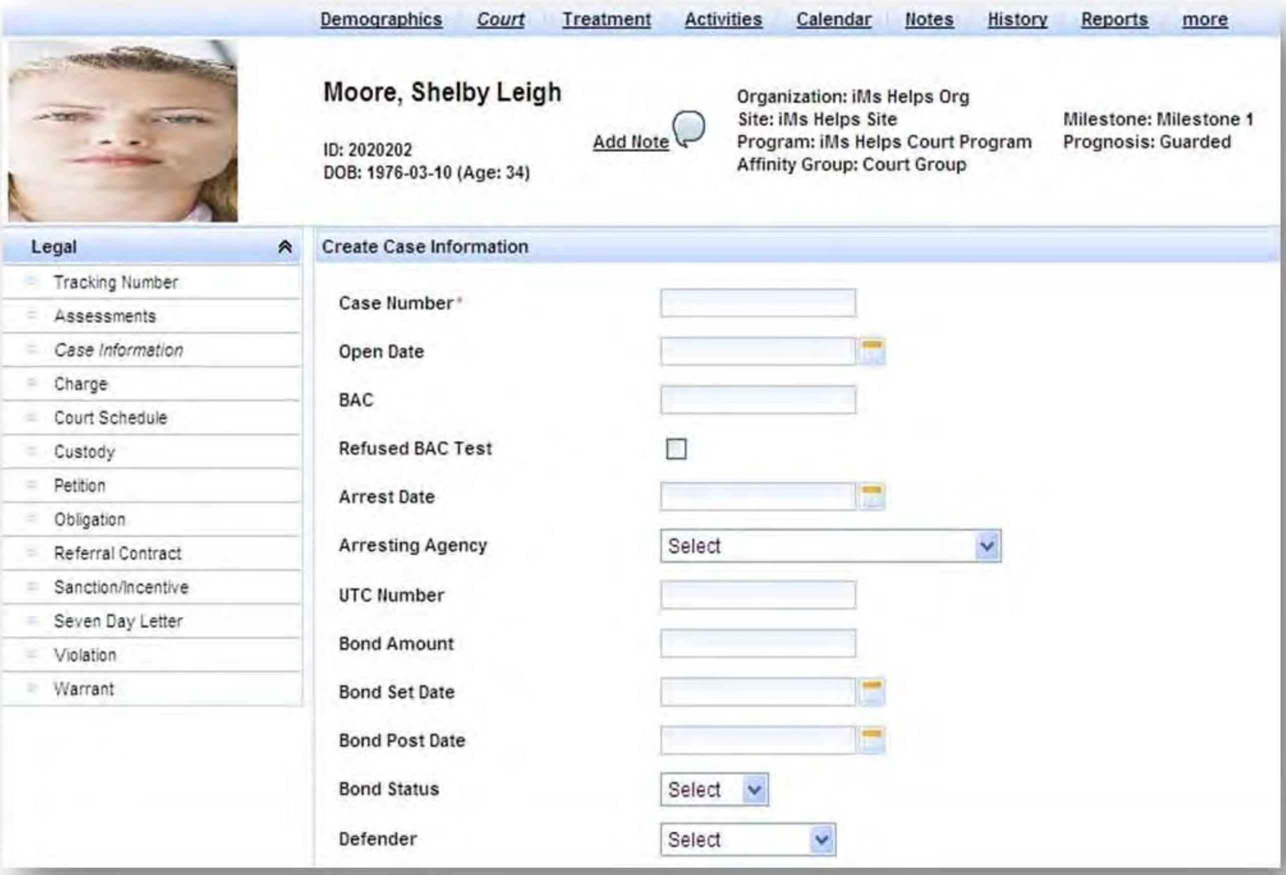


Click on links to Change Program Status or Legal Status

Clients – Important Court Screens

Important Screens available in the Court Section of the Clients Perspective:

- Case Information
- Charges
- Court Schedule
- Obligations
- Referral Contracts
- Sanctions / Incentives

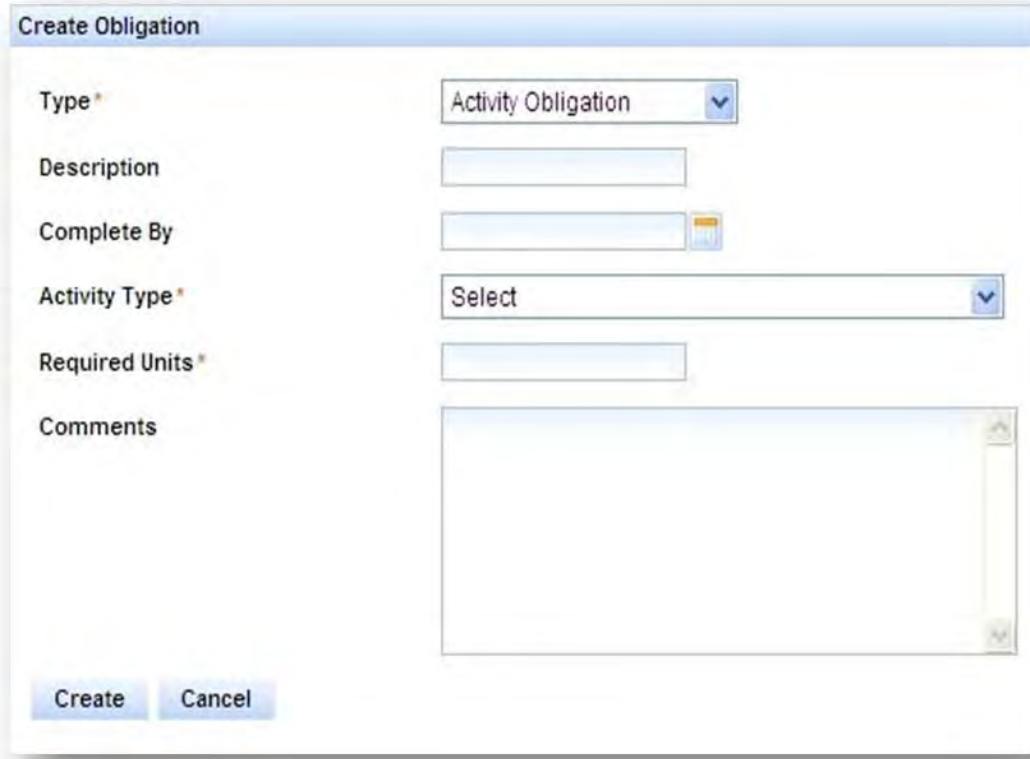


Clients – Obligations

Obligations can be used to track requirements of the Client.

To Create an Obligation:

1. **Select the correct Obligation Type.**
2. **Enter all required information in the available fields.**
3. **Click Create.**



NOTE: The user should update the client's Obligation to include a date in the "Satisfied" field.

Clients - Referral Contracts

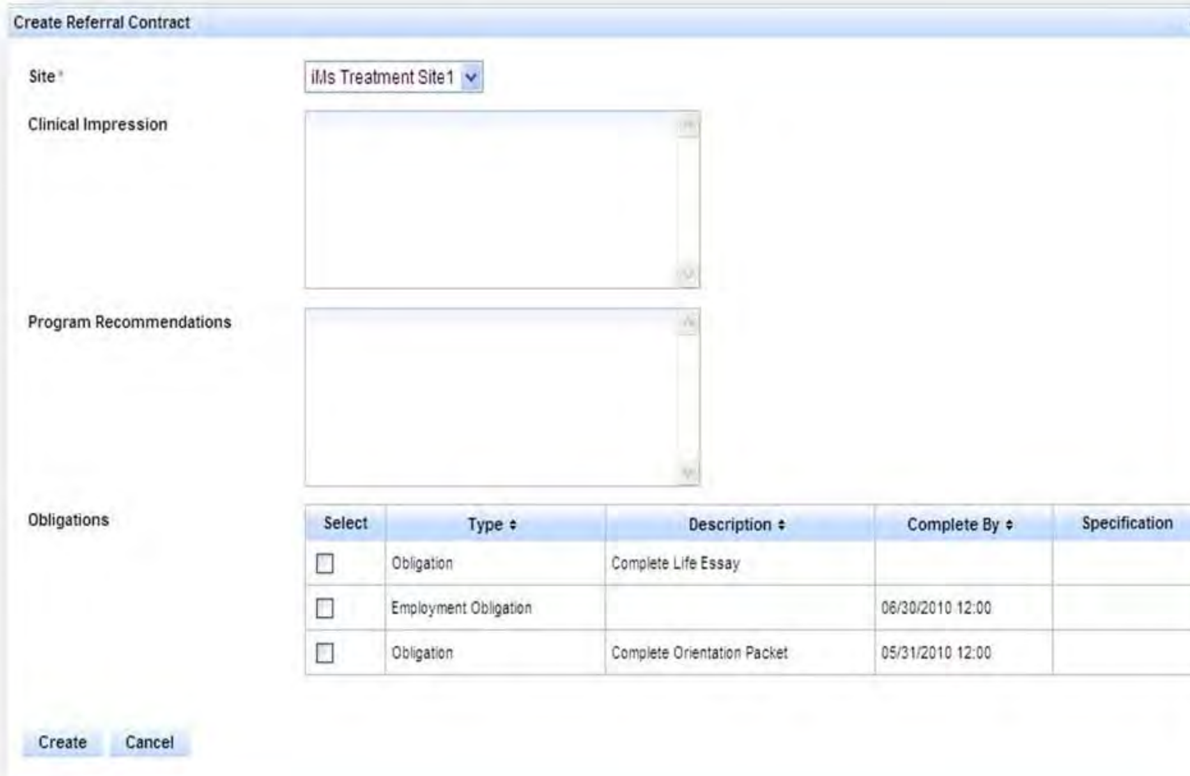
Users can refer a client to another Site to monitor client obligations.

<u>To Create a Referral Contract:</u>

1. **Select the correct Site**

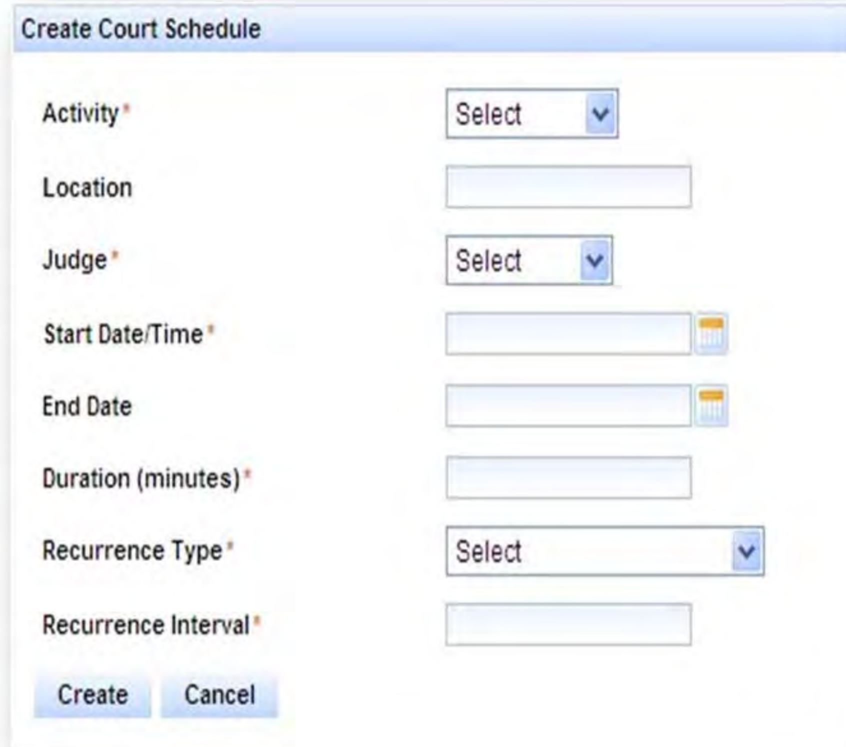
2. **Select any Obligations which the site will monitor.**

3. **Click Create.**



Clients – Court Schedule

The user may record individual Court Appearances using the Court Schedule Screen.

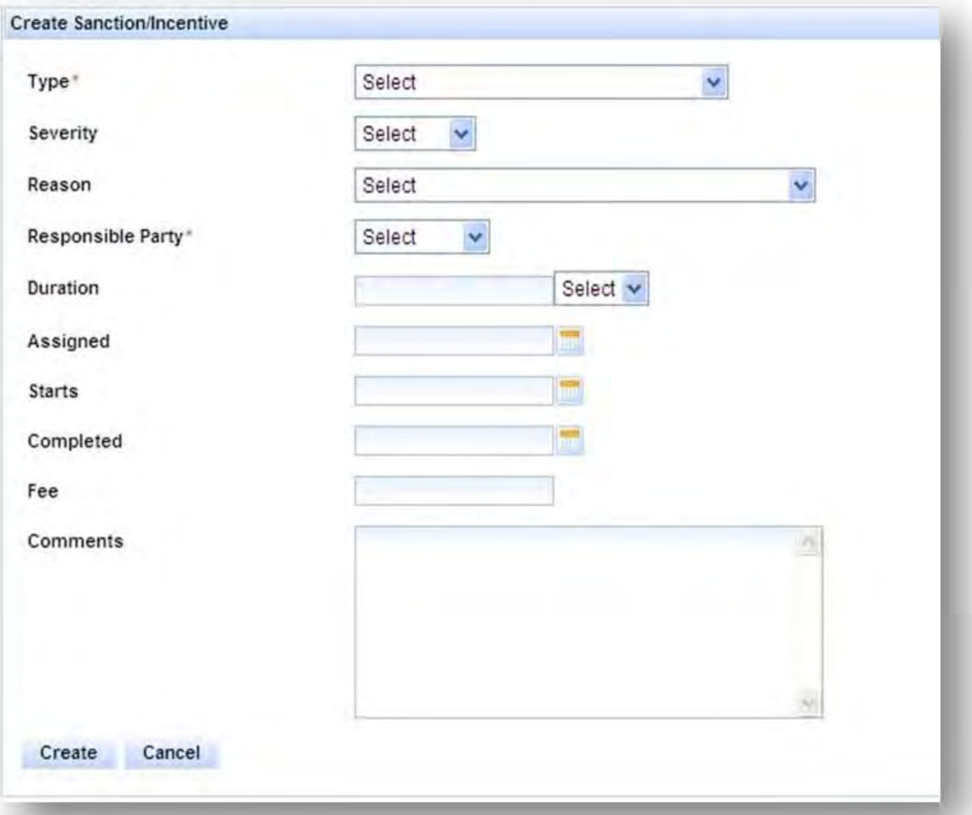


To Create a Court Schedule:

1. **Select the correct Activity Type.**
2. **Enter all required information in the available fields.**
3. **Select a Recurrence Type from the provided list.**
4. **Set a Recurrence Interval based on what Recurrence Type was selected. (i.e. Select Recurrence Type "Weekly" and Reccurence Interval as"1" if the client is to attend court every week.**

Clients - Sanctions / Incentives

Users can record information regarding Sanctions and Incentives given to the Client. A fee can be associated with these records.



<u>To Create a Sanction Incentive:</u>

1. Select the correct Sanction or Incentive Type.
2. Enter all required information in the available fields.
3. Click Create.

NOTE: Fees associated with a Sanction or Incentive can be managed under the Accounting portion of the "More" section in the Client's Perspective.

Treatment

- The user may navigate to each section of the Treatment Navigation Menus by clicking on the section header of the menu. All sub-categories will display below the selected menu section.

- The majority of the data under the “Treatment” category is data required for the client’s Evaluation Report.

- This section allows the user to record the client’s Clinical Diagnosis, Problems, Goals, and Objectives. This data is displayed on the client’s Treatment Plan Report.

- This section allows the user to manage client Activity Plans, Attendance, and Treatment Notes.

Treatment Dashboard

This screen appears when the user selects the "Treatment" category. This screen allows the user to view the following important information regarding the client's treatment status:

- **Date Treatment Plan Established**
- **Date Treatment Plan is Due for Revision**
- **Prognosis**
- **Participants**
- **Diagnoses**
- **Problems**
- **Goals**
- **Objectives**
- **Activities' Attendance Numbers**

Evaluation

The majority of the information recorded under the Evaluation Menu is based upon the Evaluation Report for the client. The following Evaluation categories can be recorded in this menu:

- **Allergies**
- **Clinician**
- **Female**
- **Health Care History**
- **Health Food**
- **Health Provider**
- **Health Style**
- **Illness**
- **Male Mental health**
- **Pain**
- **Personal Insight**
- **Prescription Drugs**
- **Sexuality**
- **Substances Used**

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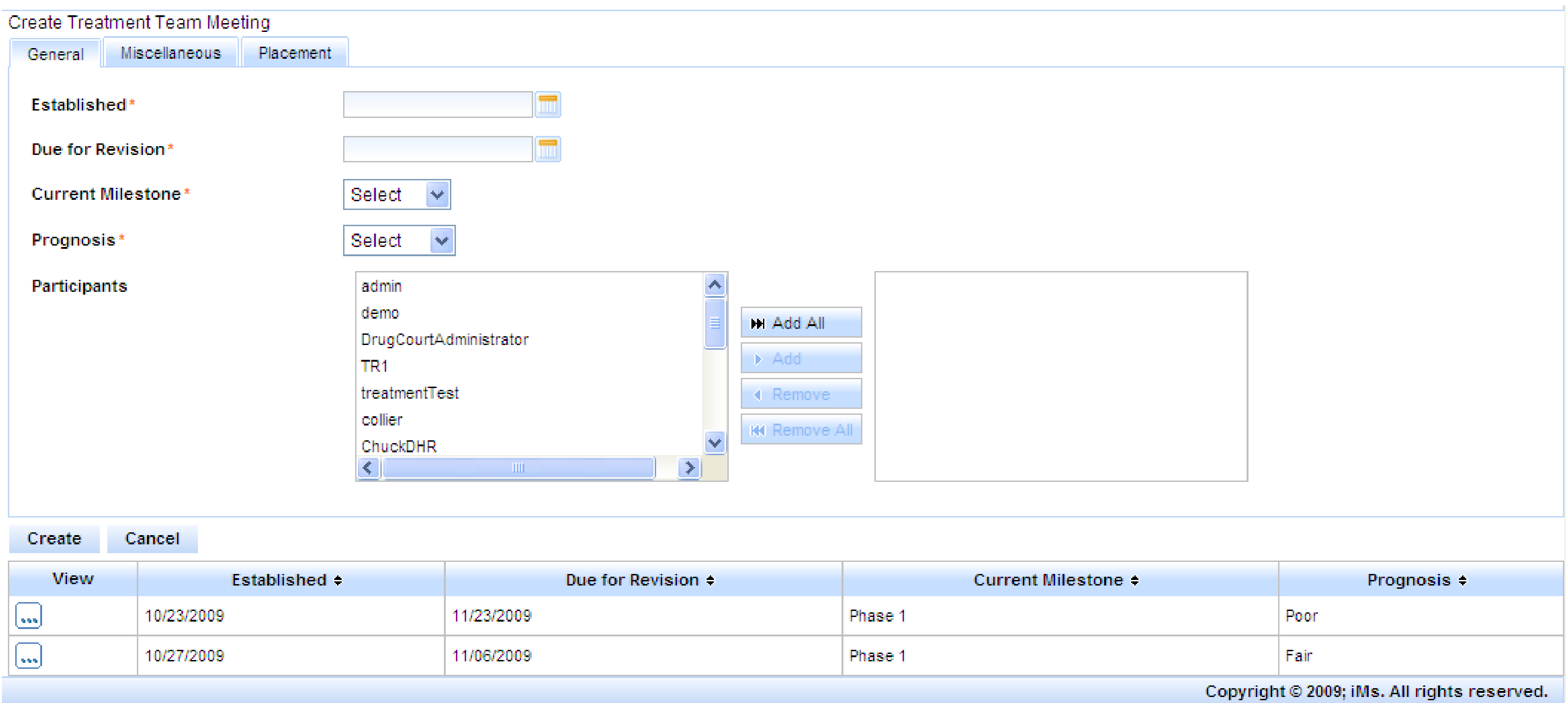
Treatment Team Meeting

- This screen allows the user to capture information regarding the treatment team meetings for the client's treatment plan.
- The Due for Revision date is used to determine "Expired" Treatment Plans on the Home Dashboard.



View	Established	Due for Revision	Current Milestone	Prognosis
...	10/23/2009	11/23/2009	Phase 1	Poor
...	10/27/2009	11/06/2009	Phase 1	Fair

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Problems

- **Allows the user to identify Problems determined during the clinical diagnosis.**
- **Allows the user to capture “Traceability” for the client’s treatment data.**

Create Client Problem

Traceability

Clinical Diagnosis: Select

Assessment: SASSI

Assessment Section: Face Validity-Alcohol (FVA)-90

Supporting Document: Select

Name*: Select

Description*:

Type*: Select

Status*: Select

Create Cancel

View	Clinical Diagnosis	Name	Description	Type	Status	Status Change date	Entered By
...	300.02 - Generalized Anxiety Disorder (GAD)	4 - Fear of Abandonment	Becomes Anxious when he feels he is being left alone in public or private.	Mental	Open	11/02/2009	Demo, David
...	300.02 - Generalized Anxiety Disorder (GAD)	3 - Fear of Public Places	Often becomes fearfull in uncommon surroundings	Mental	Open	11/02/2009	Demo, David
...	xxx.xx - Substance-Related Disorders	5 - Drug Seeking Behavior	Exhibits Drug Seeking Behavior on a Daily Basis	Addiction	Open	11/02/2009	Demo, David
...	xxx.xx - Substance-Related Disorders	8 - Abuse of Drugs to Feel Normal	Daily Use/Abuse for General Functioning	Addiction	Open	11/02/2009	Demo, David
...	xxx.xx - Substance-Related Disorders	9 - Abuse of Drugs for Pain Management	Uses Alcohol to Control Foot Pain	Addiction	Open	11/02/2009	Demo, David

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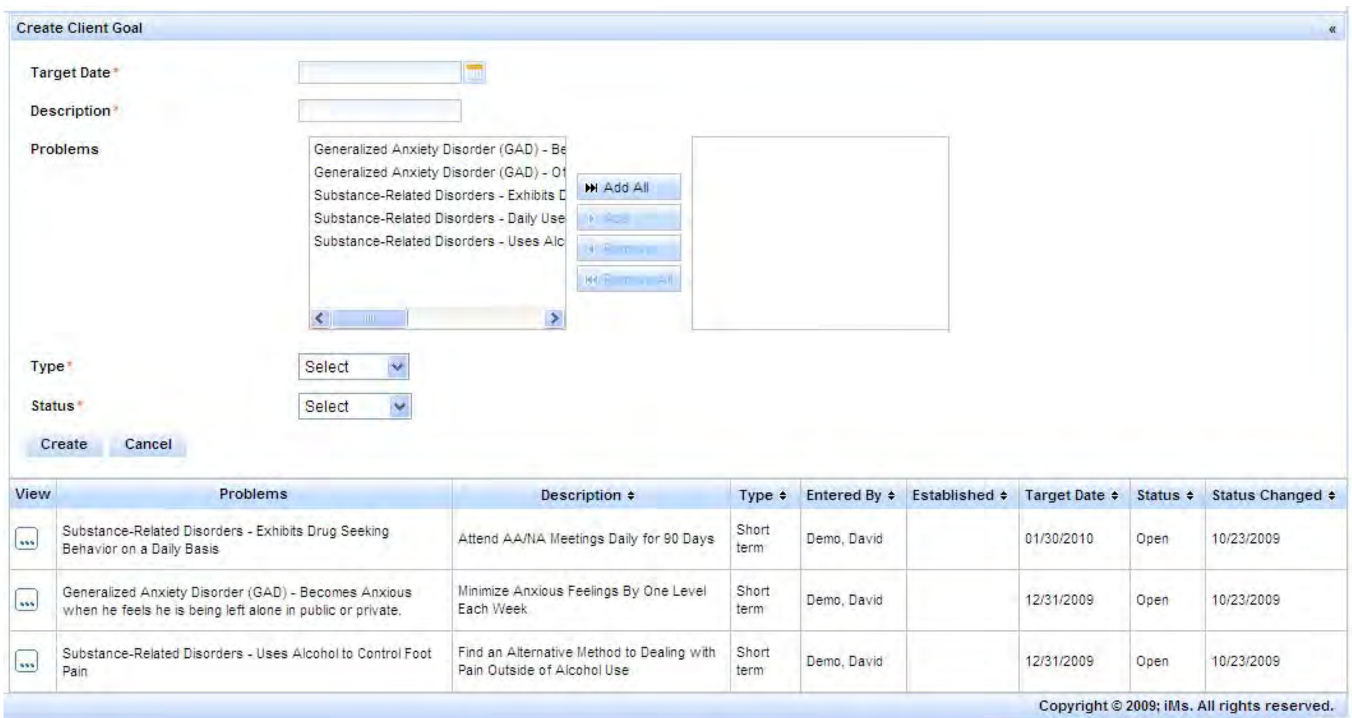
Goals

- This screen allows the user to assign a client goals that can be associated with one or more problems included in the client's Treatment Plan.
- Goals are displayed on the Treatment Dashboard along with its status and any associated notes.
- Goals with an expired "Target Date" are displayed on the Home Dashboard.



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Objectives

- This screen allows the user to assign objectives that can be associated with a goal that exists in the client's Treatment Plan.
- Objectives are displayed on the Treatment Dashboard along with a status and associated notes.
- Objectives with an expired "Target Date" will be displayed on the Home Dashboard.

Create Client Objective

Target Date *

Description *

Goal * Select

Type * Select

Status * Select

Create Cancel

View	Goal	Description	Type	Entered By	Established	Target Date	Status	Status Changed
...	Attend AA/NA Meetings Daily for 90 Days	To Share One Item in Each AA Meeting	Therapeutic	Demo, David		12/31/2009	Open	10/23/2009
...	Minimize Anxious Feelings By One Level Each Week	Write in Anxiety Journal Each Day	Therapeutic	Demo, David		12/31/2009	Open	10/23/2009
...	Find an Alternative Method to Dealing with Pain Outside of Alcohol Use	Will Exercise Foot and Follow Dr.s Order Regarding Pain Management While Documenting Daily Pain	Short Term	Demo, David		12/31/2009	Open	10/23/2009

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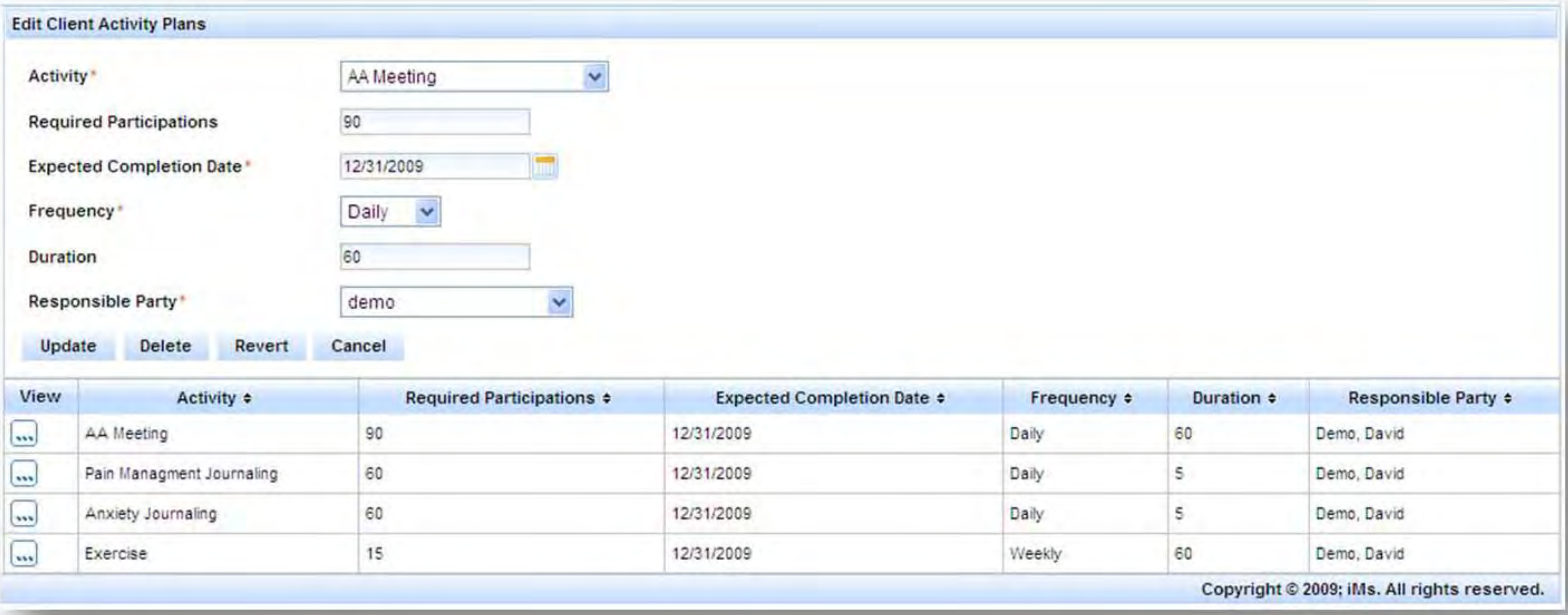
Clients - Activity Plan

- The user must create an Activity Plan before enrolling the client in Activities.
- The Activity Plan allows the user to identify a required number of participations for an activity. iMs Connexis will calculate the number of participations completed as the activity attendance is managed for the client.



Edit Client Activity Plans

Activity* AA Meeting

Required Participations 90

Expected Completion Date* 12/31/2009

Frequency* Daily

Duration 60

Responsible Party* demo

Update Delete Revert Cancel

View	Activity	Required Participations	Expected Completion Date	Frequency	Duration	Responsible Party
...	AA Meeting	90	12/31/2009	Daily	60	Demo, David
...	Pain Managment Journaling	60	12/31/2009	Daily	5	Demo, David
...	Anxiety Journaling	60	12/31/2009	Daily	5	Demo, David
...	Exercise	15	12/31/2009	Weekly	60	Demo, David

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Clients - Activity Enrollment

The Activity Enrollment Screen is organized into three sections:

1. **Planned Client Activities – Displays the Activity Plans that have been created for a Client. Also, allows the user to manage "Ad Hoc Attendance" for these activities.**

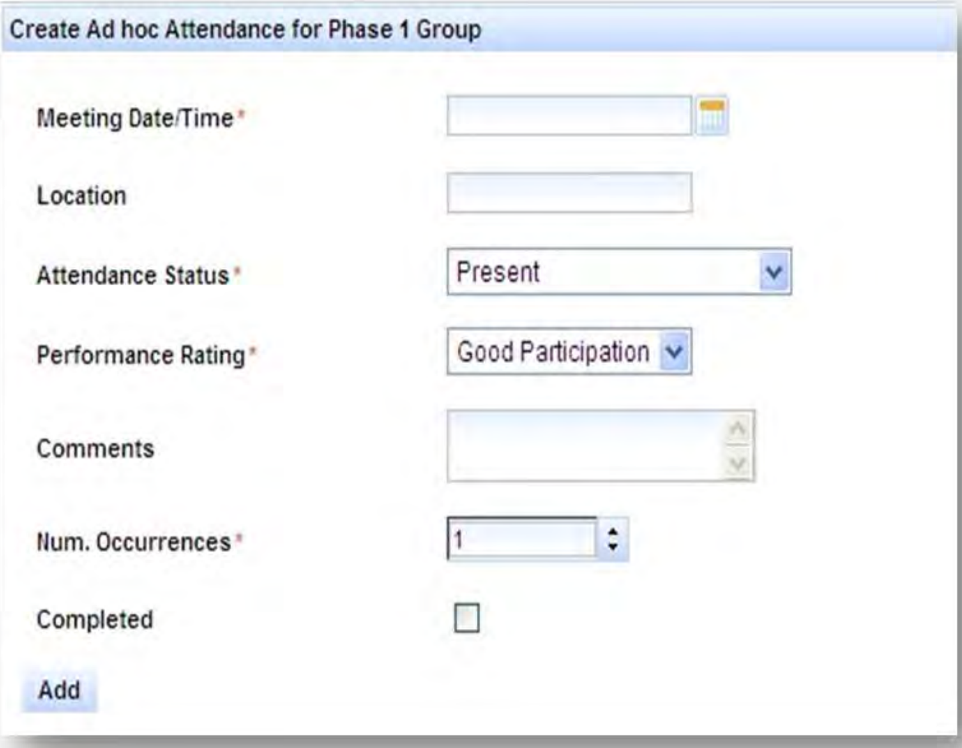
2. **Currently Scheduled Activities – Lists each activity schedule in which the client is enrolled.**

3. **Available Schedules – Lists all available schedules for each planned activity. Clients are enrolled in a schedule by selecting the "Add" button next to the desired schedule.**

Clients – Ad Hoc Attendance

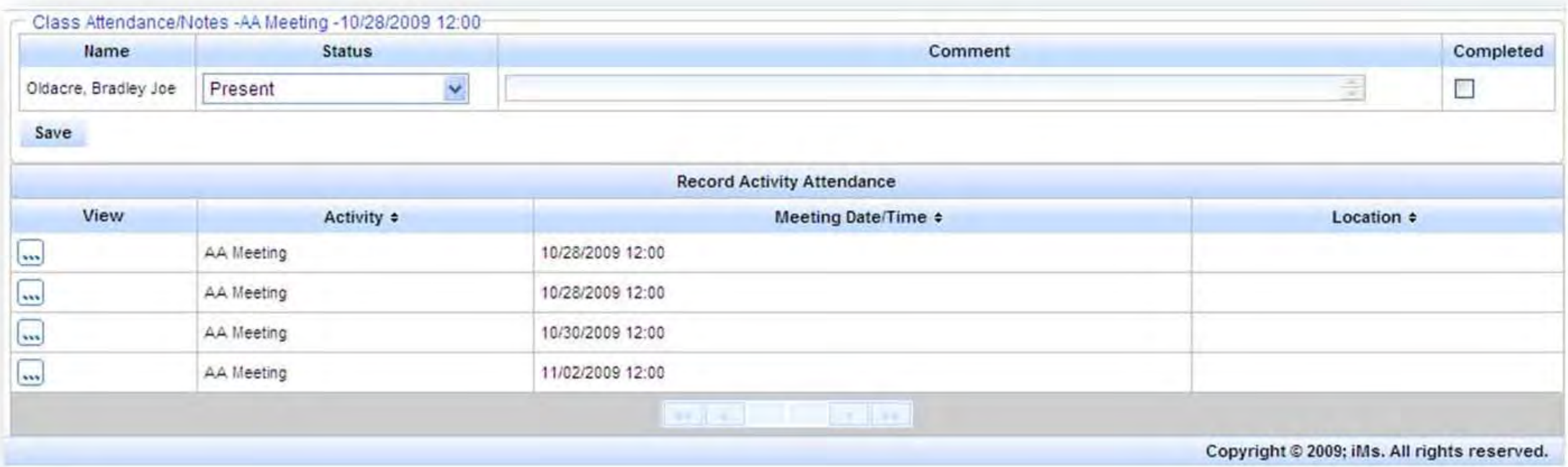
To Create Ad Hoc Attendance for a Planned Activity:

1. Select the Activities section under Clients.
2. Click on the link for the correct activity on the Activities Dashboard.
3. Enter the Meeting Date/Time, Attendance Status, and the Number of Occurrences for the activity.
4. Select the “Add” button.



Activity Attendance

- **This screen allows the user to manage the client's attendance for scheduled activities.**
- **When the user selects the "View" button for an activity, the correct attendance status may be selected from the available drop down list. The user may also enter a comment regarding the client's participation in the activity.**
- **When the client has completed all requirements for an activity, the user may select the "Completed" check box to remove the client from any future occurrences of that activity schedule.**



Activity Attendance on Treatment Dashboard

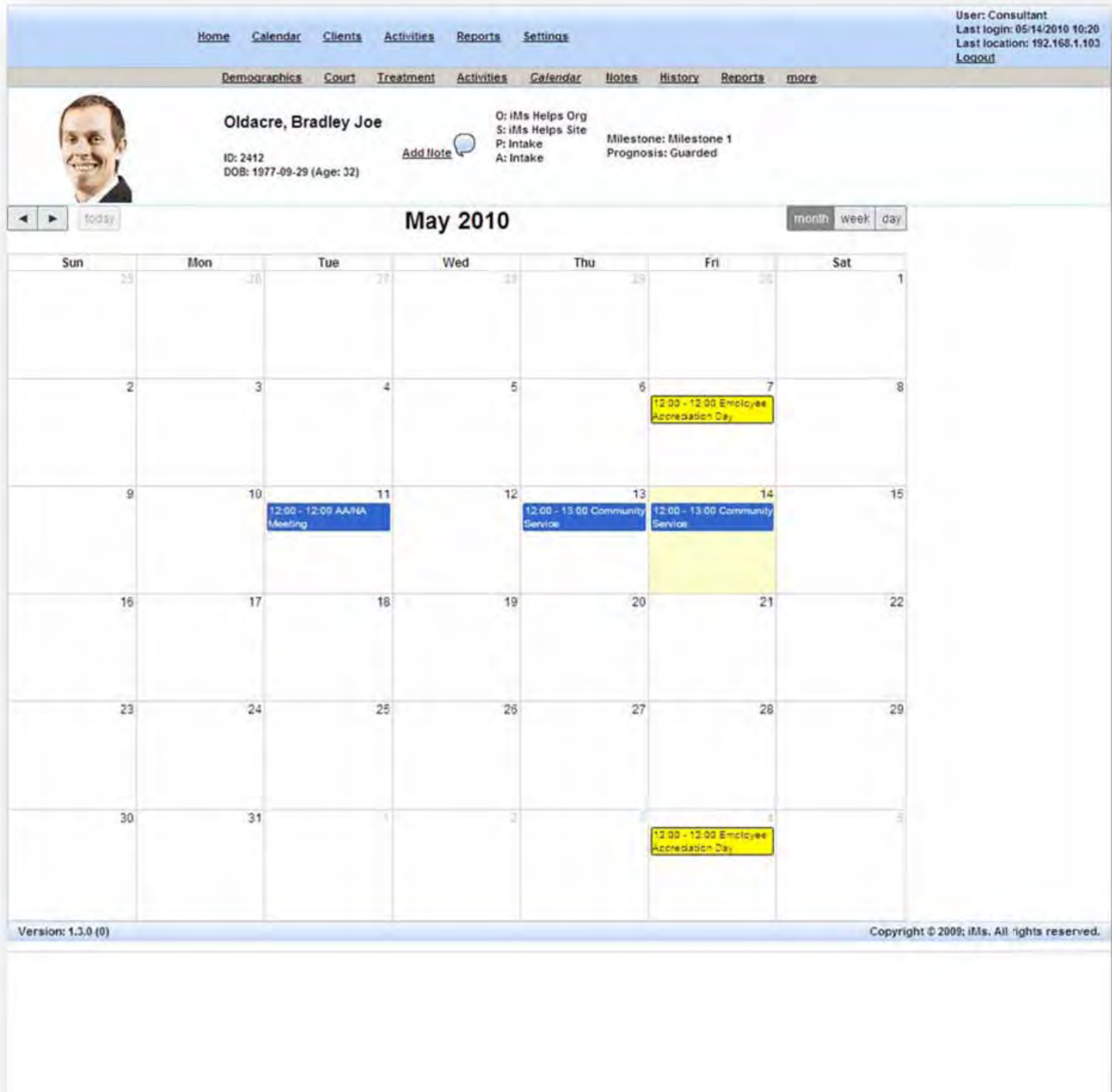
Activities

Description	Present	Absent	Excused	Remaining	Required
AA Meeting	2	0	0	88	90
Anxiety Journaling	0	0	0	60	60
Exercise	0	0	0	15	15
Pain Managment Journaling	8	0	0	52	60

The Activity Attendance numbers on the Activities Dashboard reflect the requirements set on the Referral Contract and Activity Plans. When the user changes the attendance status for an activity occurrence, these numbers will calculate accordingly.

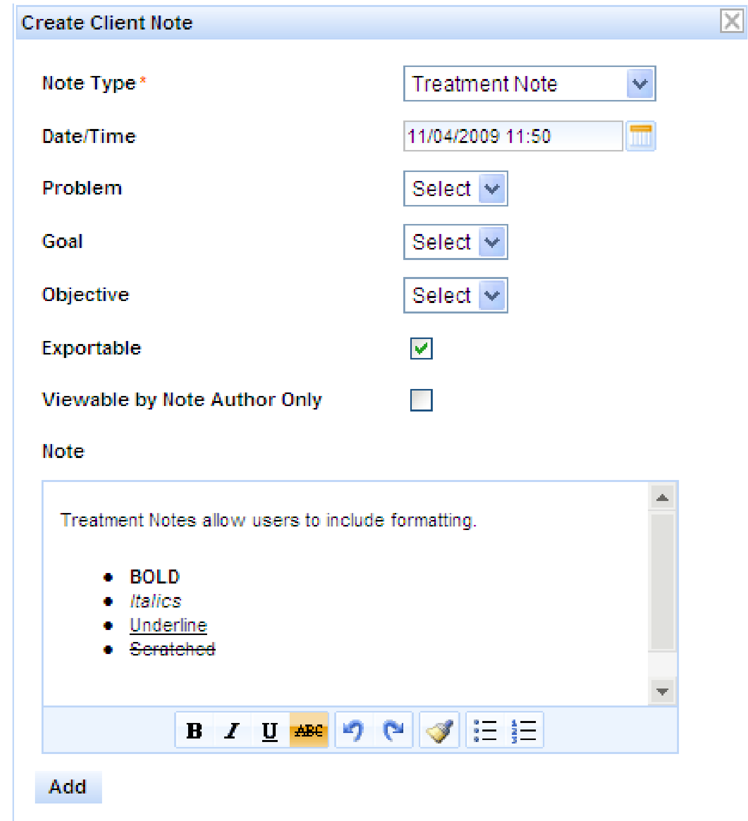
Clients - Calendar

The Client’s Calendar displays important dates related to the client’s court and treatment management.



Universal Note

- Appears on all Client Specific screens.
- Can be tied to a Problem, Goal, and/or Objective.
- Can be set as “Private” (Author only)
- Notes have formatting capabilities.



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Clients - Notes

The Notes section of the Clients Perspective displays a history of all notes that have been added to the client's record. These notes are filtered according to the author and user's permissions. The user may print one note using the Printer Icon that appears to the right of the note.

View	Print	Date/Time	Note Type	Entered By	Problem	Goal	Objective	Exportable	Private
		04/30/2010 08:47	Treatment Note	Consultant	Inappropriate Social Drinking - Alcohol Abuse			false	false
		Admitted that she struggles with abuse of Alcohol when out with friends. Discussed several specific instances in which she lost control due to her alcohol abuse.							
		04/30/2010 07:58	Court Note	Consultant				false	false
		Appeared before Judge and presented list of reasons why she wants to get sober. She is presenting signs of remorse for the affects her alcohol abuse has had on her family.							
		04/30/2010 07:53	Treatment Note	Consultant	Abuse of Drugs to Feel Normal - Self-Medicates for Depression using Alcohol	Complete Phase 1	Write Life Story Essay	false	false
		Life essay turned in today. Her story describes a pattern of behavior related to the self-medication. She has admitted that this is a problem that she needs to address. • Will be discussing this with her family • Will make appt with dr to see about possible prescription for depression							

Clients - History

The History Section of the Clients Perspective allows the user to view a history of the client's records entered in iMs Connexis. The user may also apply filter those records by specifying a date range in the Start and End fields.

History

Start* 04/17/2010

End* 05/17/2010

Search

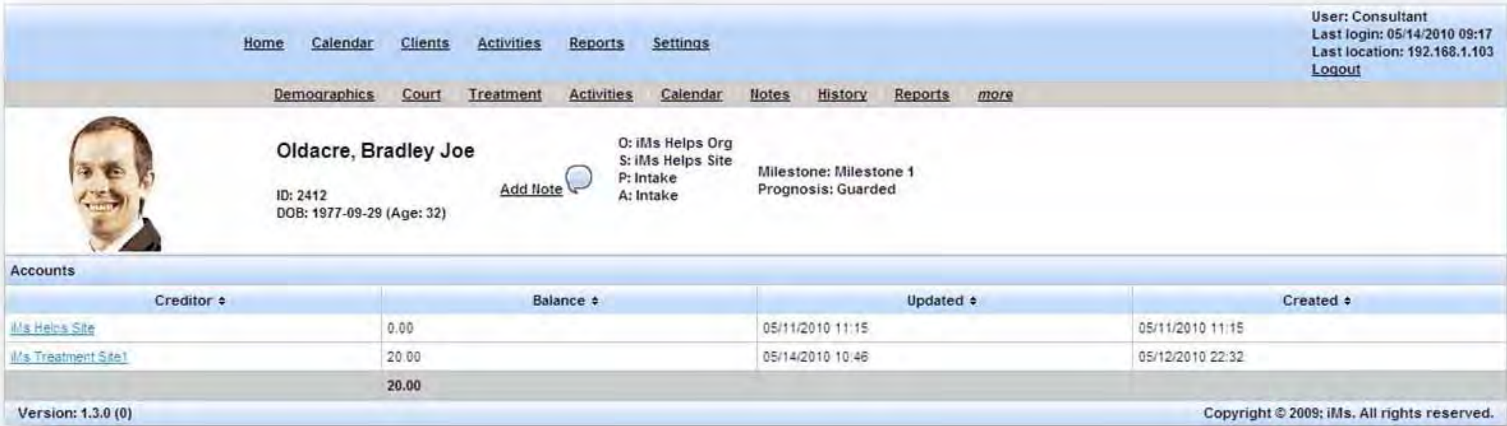
Occurred	Type	Outcome	Amount	Comments/Description
04/30/2010 08:47	Client Note			Admitted that she struggles with abuse of Alcohol when out with friends. Discussed several specific instances in which she lost control due to her alcohol abuse.
04/30/2010 07:58	Client Note			Appeared before Judge and presented list of reasons why she wants to get sober. She is presenting signs of remorse for the affects her alcohol abuse has had on her family.
04/30/2010 07:53	Client Note			Life essay turned in today. Her story describes a pattern of behavior related to the self-medication. She has admitted that this is a problem that she needs to address. • Will be discussing this with her family • Will make appt with dr to see about possible prescription for depression
04/30/2010 07:45	Entry	Fee	10.00	Phase 1 - M/W/F Enrollment
04/30/2010 07:32	Entry	Fee	10.00	Phase 1 - M/W/F Enrollment
04/29/2010 12:00	AA/NA Meeting	Present		Hope House
04/29/2010 12:00	AA/NA Meeting	Present		Hope House
04/29/2010 12:00	AA/NA Meeting	Present		Hope House
04/29/2010 12:00	AA/NA Meeting	Present		Hope House
04/22/2010 12:00	AA/NA Meeting	Late - Absent		Showed up 5 minutes late and was not allowed into meeting.

Clients – More Section

The More section of the Clients Perspective allows the user to manage each of the following:

- Accounting
- Assessments
- Courtesy Notes
- Documents
- Drug Testing
- Summary Notes

Clients - Accounting

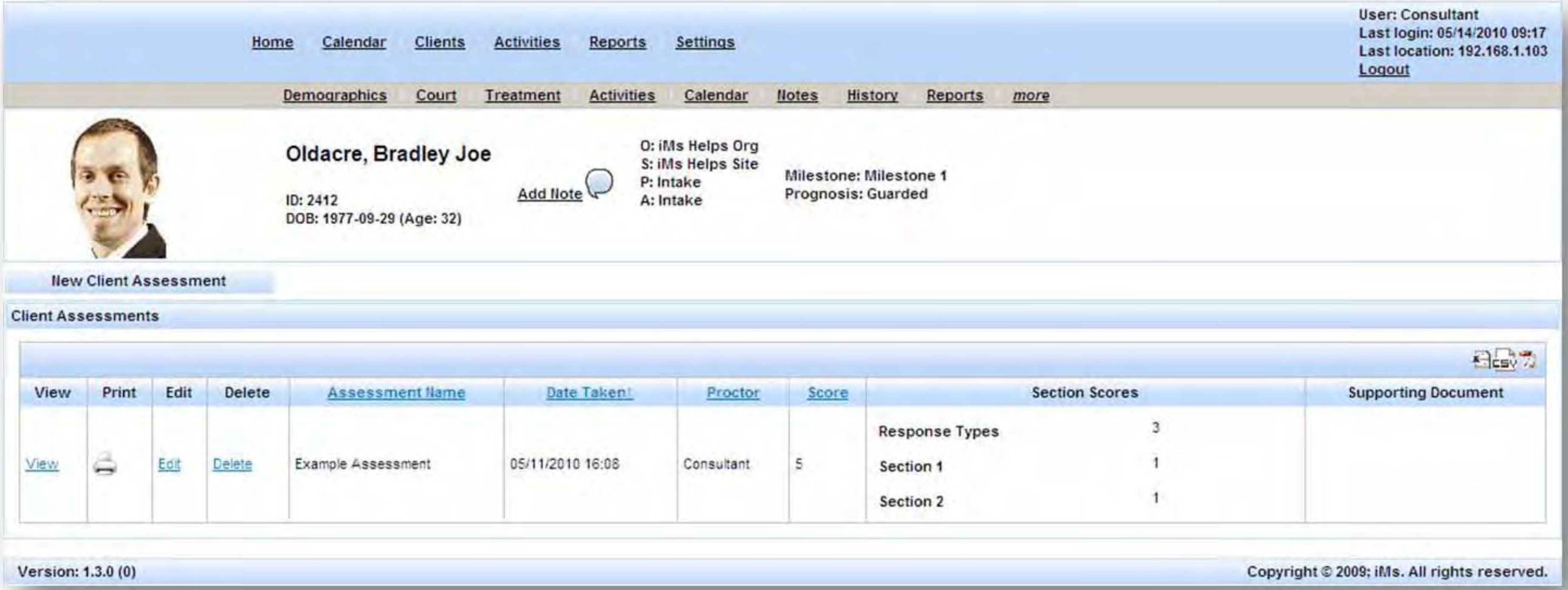


The Accounting portion of the Clients Perspective allows the user to keep up with Fees and Payments associated with each Site to which the client is assigned. The user can create fees for Activities and Sanctions from their respective sections. The user may also create an Ad Hoc fee that is not related to a scheduled activity or sanction.

Assessments

The Assessments screen allows the user to record information regarding the client's assessments. The user can save scores for each section of an existing assessment. The user can also create limited assessments with true/false, free text, Single Selection, and Multiple Selection response types.

*****Assessment Tools are managed under the Treatment section on the "Settings" screen.**



Clients - Summary Note

- The Summary Note screen allows users to quickly enter multiple case or therapeutic notes related to a client's problems, goals, or objectives from one screen.

- The Summary Note screen automatically displays previously entered staff notes allowing the user to read the client's recent case history before entering a special note for each item.

- Summary Note can be used for consolidated management and creation of dated and documented Treatment Plan Updates.

Clients – Summary Notes

Problems

	Description	Status
	Alcohol Abuse	Open

Date/Time	Note Type	Entered By
04/30/2010 08:47	Treatment Note	Consultant

Just testing this

	Description	Status
	Self-Medicates for Depression using Alcohol	Open

Date/Time	Note Type	Entered By
04/30/2010 07:53	Treatment Note	Consultant

Life essay turned in today. Her story describes a pattern of behavior related to the self-medication. She has admitted that this is a problem that she needs to address.

- Will be discussing this with her family
- Will make appt with dr to see about possible prescription for depression

Integrated Management Solutions

Clients - Create an Assessment

To Create an Assessment:

1. Open the “Settings” Screen.
2. Select “Assessments” in the Treatment Section.
3. Enter a name and Description of the Assessment and click “Create.”
4. Select “Edit Sections” button for the new Assessment.
5. Create Section Name.
6. Select “Edit Items” button for the section.
7. Enter the required information for the Assessment Item.

Create Assessment

Name *

Description

Create Cancel

View	Edit Sections	Name	Description
...	...	MMPI	Minnnestoa Multiphasic Personality Inventory
...	...	LOF	Level of Functioning
...	...	CAI	Client Assessment Inventory
...	...	SAS	Staff Assessment Summary
...	...	SASSI-A2	Substance Abuse Subtle Screening Invetory-Adolescent 2
...	...	SASSI	Substance Abuse Subtle Screening Invetory
...	...	GAF	Global Assessment of Functioning
...	...	MAST	Michigan Alcohol Screening Test

Documents

- This screen is similar to the Document Archive that is currently in COTTS. From this screen, the user may upload and download documents regarding the client's treatment.

Integrated Management Solutions

Activities

The Activities Perspective allows the user to view and manage scheduled Group Activities.

Home Calendar Clients Activities Reports Settings

Activities

- Record Attendance
- Activity Roster
- Activity Settings

Record Activity Attendance

Print	Activity	Meeting Date/Time	Location	Attendee Count
	Milestone 1	04/01/2010 09:00	The Helps Home	0
	Milestone 1	04/08/2010 09:00	The Helps Home	0
	Milestone 1	04/15/2010 09:00	The Helps Home	0
	Milestone 1	04/22/2010 09:00	The Helps Home	0
	Phase 1 Group	04/25/2010 08:00		0
	Phase 1 Group	04/26/2010 08:00		0
	Phase 1 Group	04/28/2010 08:00		0
	Milestone 1	04/29/2010 09:00	The Helps Home	0
	Phase 1 Group	04/30/2010 08:00		0
	Milestone 1	04/30/2010 12:00	Treatement Location	1
	Milestone 1	04/30/2010 12:00	iMs Court	1
	Milestone 1	05/01/2010 12:00	Treatement Location	1
	Milestone 1	05/02/2010 12:00	Treatement Location	1
	Phase 1 Group	05/03/2010 08:00		0
	Milestone 1	05/03/2010 12:00	Treatement Location	1

1

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Who Can Manage Group Activities?

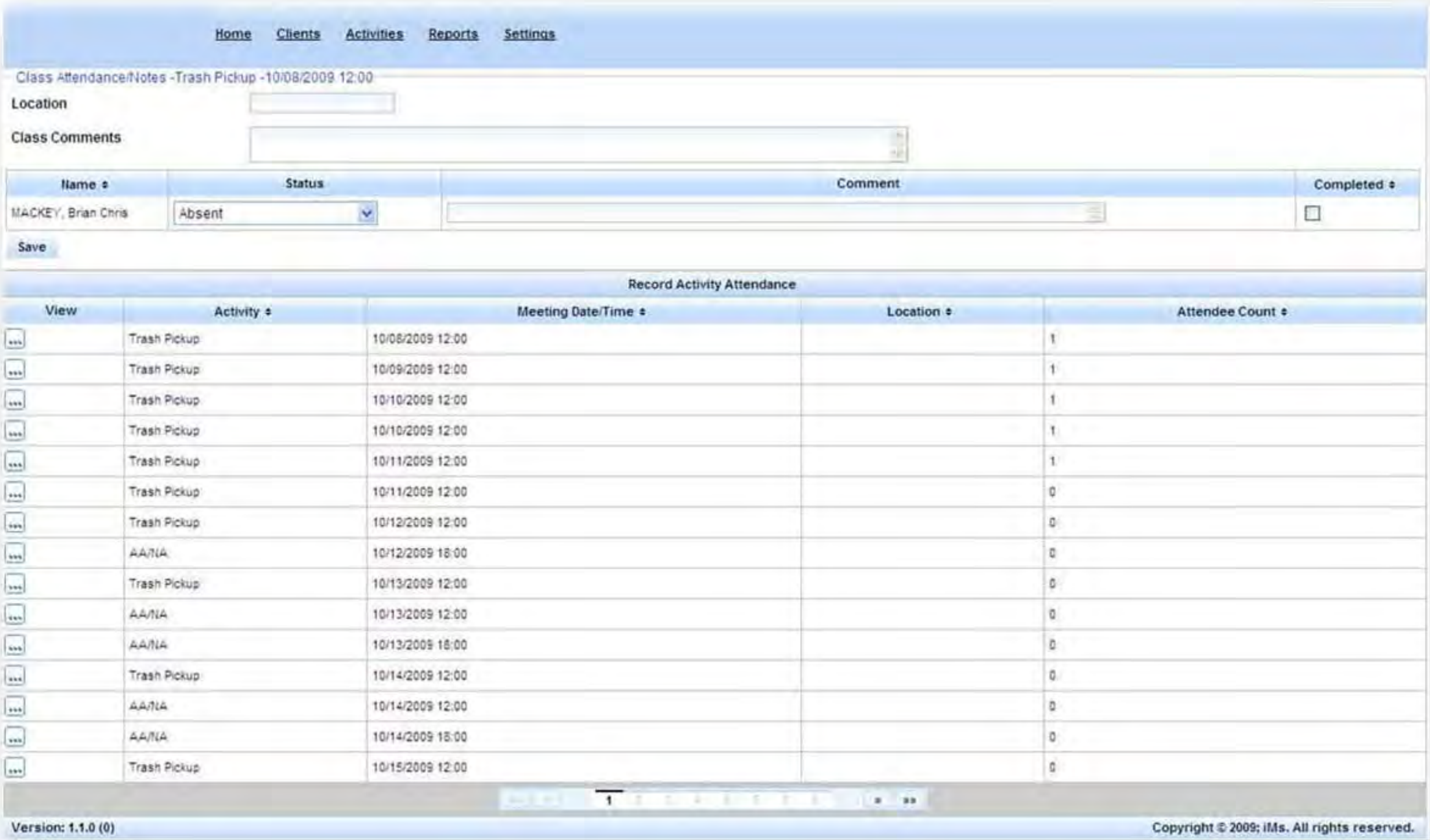
Permissions to manage attendance on the "Activities" screen are given to the following:

- The Instructor selected for the Activity (Activity Schedule)
- Attendance Recorders selected for the site assigned to the activity

**NOTE: Attendance Recorders will be managed by the AOC Data Coordinator. Let Raquel Gonzales know if a user should have permissions to manage group activity attendance on the "Activities" screen.

Managing Group Attendance

1. Click on the view button next to the correct activity in the list.
2. Select an attendance status for ALL clients assigned to the activity.
3. Enter client or class comments in the provided fields.
4. Click Save.



Reporting in iMs Connexis

- Activity Roster
- Address List
- Admissions Over Time
- Bench Warrant
- Birthday List
- Blank Assessment
- Calendar
- Client History
- Cases by Program Status
- Cases without Referrals
- Client Assessment
- Client Court Statistics
- Client Drug Test Summary
- Client Sanctions / Incentives
- Arrests
- Court Appearance List
- Drug Test Final
- Family Staffing
- Gwinnett Staffing
- Hospital Days
- Jail Days
- Juvenile Staffing
- Ledger
- Offense Summary
- Probation Expiration
- Referrals Over Time
- Retention Rate
- Sanction Incentive Summary
- Seven Day Letter
- Staffing
- Treatment Plan Update
- UDS Alert
- Violation Report

Integrated Management Solutions

Settings – Create Custom Query

Edit Custom Query

Name* Charge Report

Site Select

Query Basis* Charge

Joins

Action	Field	Alias	Left Join	Position
Remove	Case Information	ci	false	4
Remove	Case Information:Tracking Number	tr	false	5
Remove	Tracking Number:Client	clie	false	6
Add	Select			7

Output Fields

Action	Field	Prompt	Header	Include in Results	Restriction	Required	Position
Remove	Client:Name		Client Name	true		false	1
Remove	Charge Class	Charge Class	Charge Class	true	Equal	true	3
Remove	Charge Type		Charge Type	true		false	4
Remove	Charge Result		Charge Result	true		false	5
Add	Select				Select		6

Update Delete Revert Cancel

View	Site	Name	Query Basis
...		Charge Report	Charge

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Integrated Management Solutions

Reporting – Generate Query Report

To Generate a Query Report:

1. Select the Correct Custom Query Report option in the Reports Perspective.
2. Enter all Required information to generate the report.
3. Click on the “Generate” button.
4. The data that meets this query will display in an Excel spreadsheet.