



## **Integrated Management Solutions**

### **iMs Connexis User Guide**

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# iMs Connexis Quick User Guide

**Part**



# 1 Using iMs Connexis

## 1.1 Login

Each person who has access to iMs Connexis should have a unique username and password assigned. This Username will be used to determine what data the user will have permissions to view.

To access the Login screen, enter <https://connexis.georgiacourts.gov> into the address bar in Internet Explorer.



The screenshot shows a login form with a light blue header bar. Below the header, there are two input fields: "Username\*" and "Password\*", each followed by a text box. A blue "Login" button is positioned below the "Password\*" field.

## 1.2 Navigation Elements

The iMs Connexis application utilizes the following four main navigation elements:

1. **Main Links Toolbar** - This Toolbar appears at the top of the screen and allows the user to navigate between the main perspectives within iMs Connexis .
2. **Client Links Toolbar** - This toolbar appears below the Main Links Toolbar when the user selects the "Clients" link. Users may navigate between the client specific sections of the Client perspective.
3. **Menus** - The Menus appear on the left side of the screen when the user selects certain sections of iMs Connexis including the Client and Settings perspectives.
4. **Tabs** - The Tabs appear across the center of certain menu options within the Client perspective. The user can navigate between tabs by clicking on the tab name.

The screenshot displays the iMs Connexis application interface for a client named Bradley Joe Oldacre. The interface is annotated with four red boxes and arrows pointing to specific navigation elements:

- 1. Main Links:** Located at the top of the page, containing links for Home, Clients, Activities, Reports, and Settings.
- 2. Client Links:** Located below the Main Links, containing links for Demographics, Treatment, and Reports.
- 3. Navigation Menu:** A vertical menu on the left side of the screen, listing various categories such as General Information, Alias, Residence, Cohabitors, Contacts, Funding Source, Transportation, Identification, Picture, Social/Spiritual, Education, Employment, Family, Juvenile, and Legal.
- 4. Tabs:** Located at the top of the client information section, containing tabs for Main and Agency.

The client information section displays the following details:

**Oldacre, Bradley Joe**  
ID: 2412  
DOB: 1963-03-06 (46)  
Corporation: Georgia ADC  
Site: Hall County  
Program: Treatment Court Program  
Affinity Group: HC Drug 1  
Add Note

**Client Information**

Client Id*	2412
Social Security Number	242 46 5325
Name	First: Bradley, Middle: Joe, Last: Oldacre, Maiden:
Contact Information	Office Number: 256-713-5232, Cell Number: 256-804-8764, Home Number: 256-496-6548, Email Address: , Comments:
Ethnicity	CAUCASIAN
Gender*	Male
Date of Birth	03/06/1963
Height	73
Weight	220
Hair Color	Brown
Eye Color	Hazel
Identifying Marks	Red Birth Mark on the Left Side of

---

## 1.3 Basic Functions

### 1.3.1 Viewing, Updating, and Deleting Records

Most screens within iMs Connexis allow the user to make changes to any record that has already been added to the system. To update a record, select the View button and make the necessary changes to the data on any or all tabs within that screen. Once all changes have been made, select the "Update" button.

The Revert button also appears when the user selects the View button to update an existing record. The Revert button allows the user to revert new changes back to the data that was saved for this record before the View button was selected. For example, Jon Smith's phone number was initially saved as 111-1111. Then, the user updated Jon Smith's phone number to 222-2222 and clicked the Update button to save that change. If the user selects the View button again and starts to change the phone number to 333-3333, the Revert button only reverts the number back to the last number that was saved, which was 222-2222. The user can still make changes to a record after selecting the Revert button.

The Cancel button also appears when the user selects the View button to update an existing record. The Cancel button takes the user back to the list screen without making any changes.

Most screens within iMs Connexis allow the user to delete a record that has already been added to the system. To delete a record, select the View button that appears to the left of the record. Select the Delete button to permanently delete the item from the list.

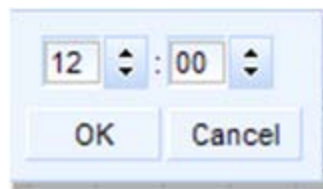
---

### 1.3.2 Calendar Icon

Numerous screens within iMs Connexis require use of the Calendar Tool to save a date and/or time. Dates can only be entered by clicking on the Calendar icon (circled below) 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 or move the date back or forward one year by selecting the "<<" and ">>" buttons. The user can also click on the month or year displayed at the top of the Calendar Tool to select the month or year from a list. Additionally, the "Today" option automatically selects the current date and the "Clean" option clears the date and time selected.



There are some date fields within iMs Connexis that require a start time in addition to the date. Once the user clicks on the correct date within the Calendar Tool, the time can be viewed in the bottom left corner of the same Calendar Tool. The user can change the time by clicking on the time. This will open a second window that allows the user to manually enter the time or use the up and down arrows that appear to the right of the hour and minutes fields. Once the correct time is displayed, select the "OK" button to save the time and then select the "Apply" option in the lower right corner to save the date and time.



#### **To Save a Date and Time:**

1. Left click on the Calendar Icon next to the correct date field
2. Select the correct date using the calendar tool
3. The time field will appear in the bottom left corner of the Calendar Tool.
4. Enter the correct time.
5. Click on the "OK" button
6. Click on "Apply" in the lower right corner of the Calendar Tool.

### 1.3.3 Export and Print Saved Data on a Screen

Many of the screens within the iMs Connexis application allow users to export data saved on a screen into one of three file types: PDF, CSV, and Excel files. To save the data on a screen into one of these file types, click on the correct icon which appears on the far right side of the screen.



**Excel Icon** - When this icon is selected, the data displayed on the screen is exported to a Microsoft Excel Spreadsheet.

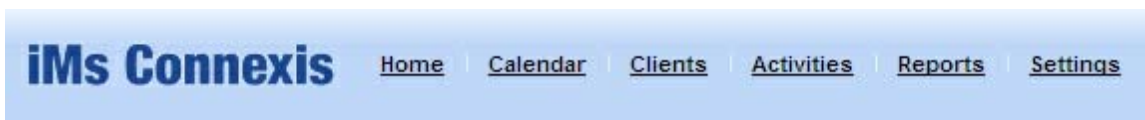


**CSV Icon** - When this icon is selected, the data displayed on the screen is exported to a CSV file (Comma Separated).



**PDF Icon** - When this icon is selected, the data displayed on the screen is exported to a printable PDF file.

## 1.4 Main Links Toolbar



The following are descriptions of each of the perspectives shown on the Main Links Toolbar in iMs Connexis:

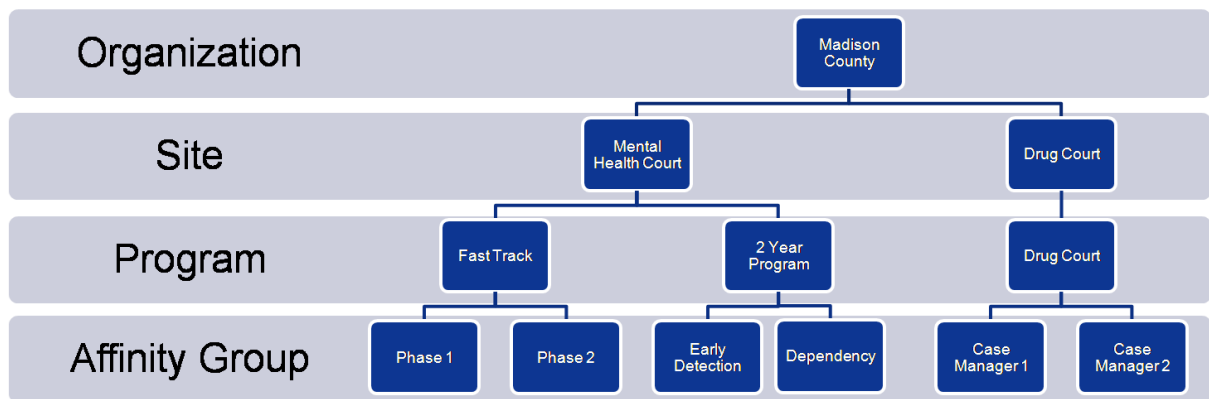
- **Home** – Displays important information regarding a Treatment Professional's clients
- **Calendar** - Displays activities and scheduled events which the User is set to manage.
- **Clients** – Allows users to select and view client specific data
- **Activities** – Allows users to manage attendance for group activities
- **Reports** – Allows users to run global reports
- **Settings** – Allows users to create and manage activity schedules, drop down lists, user permissions, and system preferences

## 1.5 Initial Setup

### 1.5.1 OSPA: Client Data Filtering

The iMs Connexis application allows users to segment data based on four levels - Organization, Site, Program, and Affinity Group. Each client entered in iMs Connexis must be assigned to at least one Placement (also known as OSPA). Users will each be assigned to an OSPA level. Users will only be able to view clients that fall under the placements that are on or below the user's assigned permissions level. For example, if User Joe was only given permissions to view the "Mental Health Court" on the Site level, he could see all clients whose placements are in the "Mental Health Court"; however, User Joe could not see those clients that whose site placement was "Drug Court." Users may only have permissions to view one OSPA level; however, they may have access to any options that fall within that level.

Additionally, the Court, Treatment, and Notes sections of the Clients perspective are filtered according to placement. If the client has more than one placement, the user must select which placement (OSPA) should be active. All data entered for the client under one of the filtered sections will be tied to the active OSPA selected in the Client Bar (indicated by the Green Box). If the user has permissions to view more than one of the client's placements, he must select which OSPA should be active. Only users who also have permissions to view that OSPA will be able to view the data entered while that OSPA was active.



### 1.5.2 Users and Roles

Enter topic text here.

---

### 1.5.3 Managing Assessment Tools

Before the user may create assessment records for a client, the Assessment Tool must be created and managed in the Settings perspective. An Assessment Tool must be created with Assessment Sections and Assessment Items. If these are not created, the assessment tool will not be available for use in the Clients perspective.

#### 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.

### 1.5.3 Create Assessment Sections

Each Assessment tool can be segmented into multiple sections. If the user sets the assessment tool up to calculate scores, these scores can be tied to sections of the assessment.

#### To Create an Assessment Section:

1. Click on the "Edit Sections" button next to the correct Assessment tool displayed in the List.
2. Enter the name and description of the Assessment Section in the provided fields.
3. Click on the "Create" button.
4. Repeat Steps 1 - 3 for each section of the Assessment Tool.

### 1.5.3 Create Assessment Items

#### To Create an Assessment Item:

Assessment Items are those questions that appear within each section of an Assessment Tool. The user may indicate which position each Item should appear in the Assessment Section. For example, if the user wished the question "How often do you read books for pleasure?" to appear as the first question in a section, the user would enter a "1" in the field labeled "Position." The user would then enter the question in the field labeled "Prompt."

1. **Position** - This field allows the user to indicate in what order each Item should appear in the Assessment Section
2. **Prompt** - This field records exactly how each Assessment Item should appear on the screen when administering the Assessment Tool.
3. **Response Type** - The user may select one of four different Response Types for an Assessment Item. These response types allow the user to indicate what type of answer should be given for the item. The four types are:
  - **True/False** - This response type is used for "Yes" or "No" questions. If this type is selected, the user should add the appropriate responses ("Yes" and "No") in the "Responses" section with the appropriate scores indicated for each response.

- **Free Text** - This response type is used for essay or open-ended questions. No responses and scoring are necessary for this response type.
  - **Single Selection** - This response type allows the user to select one option from a response drop down list. If this type is selected, the user should add the appropriate responses in the "Responses" section with the appropriate scores indicated for each.
  - **Multiple Selection** - This response type allows the user to select multiple options from a list of response check boxes. If this type is selected, the user should add the appropriate responses in the "Responses" section with the appropriate scores indicated for each.
4. **Response Required** - This check box allows the user to indicate that a response must be selected or entered for the Assessment Item before moving to the next Item. It is suggested that this option be selected if the user intends to count the responses to this Item in the Assessment score.
  5. **Count Response in Score** - This check box allows the user to indicate that the responses to the Assessment Item will be used to calculate the client's score. These scores are indicated in the "Responses" section of the screen.
  6. **Responses** - This section allows the user to indicate what response options should appear for an Assessment Item and how much each response counts towards the final score of an Assessment.

**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.

---

**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:

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

## 1.5.4 Managing Activity Schedules

The iMs Connexis application filters each Activity Schedule by Site. In order to ensure that activities are filtered correctly, each Activity Schedule must be assigned to a Site and an Instructor when created. The user must also select the exact Start Date and Time and Duration for that Scheduled Activity. These schedules can be set to recur in many different intervals by selecting from the options available in the "Rekurs" drop down list. For example, if the user wishes to create an activity that occurs on the first and third Thursday of each Month, he should select the "Week of the Month" option from the "Rekurs" list. When creating a recurring activity, the "Interval" field requires the user to indicate how often the selected recurrence type will occur. For example, if the user selects "Weekly" in the "Rekurs" drop down lists and enters "1" in the "Interval" field, the activity will be scheduled every week. If "2" is entered in the "Interval" field, the activity would be scheduled every other week. The user may also indicate on which day of the week the activity should occur by clicking on the check box(es) for the day(s) on which the activity should be scheduled. The user may also select "Ad Hoc" from the "Rekurs" drop down list if the Activity does not have a specific schedule (ex. AA / NA Meetings and Community Service).

### **To Create an Activity:**

1. Select the "Activities" link from the Main Links Toolbar.
  2. Select "Activity Settings" from the menu that appears on the left side of the screen.
  3. Click on the View button in the "View Schedules" column next to the correct Activity in the list.
  4. Select the correct "Site" from the drop down list.
  5. Create a name for the Activity Schedule.
  6. Select the correct "Instructor" from the drop down list.
  7. Use the Calendar Tool to enter a Start Date/Time for the Activity Schedule.
  8. Enter the duration of the activity in minutes. (NOTE: This field only allows numeric characters.)
  9. Select the correct type of recurrence for the activity from those available in the "Rekurs" drop down list.
  10. Enter the correct interval related to the option selected in the "Rekurs" drop down list.
  11. Enter any other necessary information in the available fields.
  12. Click on the "Create" button to save the schedule for an activity.
-

**Create Activity**

Name\*

Description

Type\*

Exportable

Fee for Enrollment

Fee if Present

Fee if Absent

Fee if Excused

View	View Schedules	Name ↕	Description ↕	Type ↕	Exportable ↕	Fee for Enrollment ↕	Fee if Present ↕	Fee if Absent ↕	Fee if Excused ↕	Archived ↕
		AA/NA Meeting	AA/NA Meeting	AA/NA	false					false
		Community Service		Community Service	true					false
		Garbage Detail	Garbage Detail	Community Service	true	10.00	0.00	10.00	0.00	false
		Milestone 1	Milestone Class 1	Court 1	false	50.00				false
		Phase 1 Group		Group	true	10.00	20.00	30.00	15.00	false
		Phase 2 Group		Group	true	10.00	20.00	30.00	15.00	false
		Phase 3 Group		Group	true	10.00	20.00	30.00	15.00	false

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## 1.6 Using the Home Perspective

This screen is intended to notify the user when one of the following occurs:

- An Instructor has an activity occurrence that still requires the attendance be entered for participants
- Any Recent Notes added to those clients which the user has permissions to see
- Clients with Expired Treatment Plans
- Clients with Expired Goals
- Clients with Expired Objectives
- Clients with Expired Activity Plans
- Clients with Unscheduled Activity Plans

The user may click on the "View" link that appears to the left of each client or activity in order to view and/or update the selected item.

[Home](#)
[Calendar](#)
[Clients](#)
[Activities](#)
[Reports](#)
[Settings](#)

User: Consultant  
 Last login: 05/11/2010 10:56  
 Last location: 192.168.1.167  
[Logout](#)

Upcoming activities for today through: 05/11/2010

Action	Meeting Date/Time	Activity	Location	Attendee Count

Recent notes since: 05/11/2010 10:56

Action	Date	Client	Author	Comments

Expired treatment plans through: 05/11/2010

Action	Due for Revision	Client	Current Milestone	Prognosis

Expired goals through: 05/11/2010

Action	Target Date	Client	Description	Status
<a href="#">View</a>	05/07/2010	Morgan, William John	Discuss Self Esteem Issue in Each Milestone Class	Open

Expired objectives through: 05/11/2010

Action	Target Date	Client	Description	Status

Unmet activity plans through: 05/11/2010

Action	Completion Date	Client	Activity	Frequency

Unscheduled activity plans

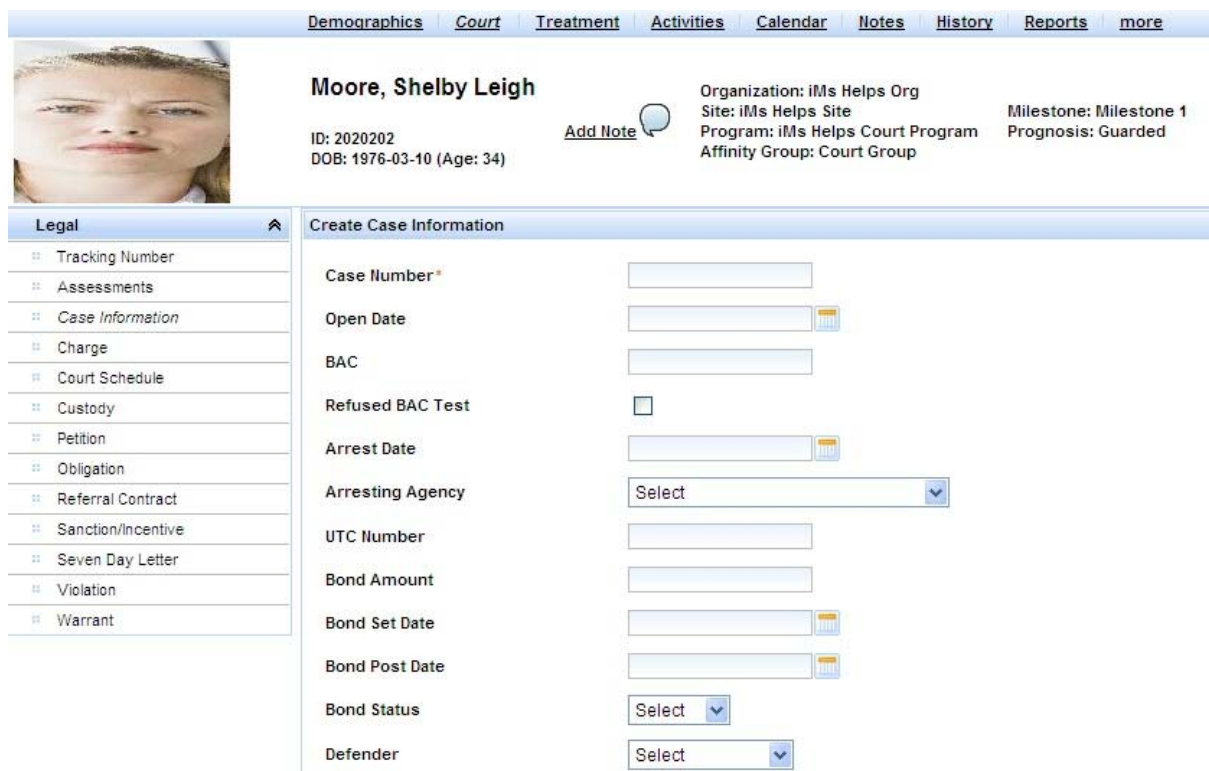
Action	Completion Date	Client	Activity	Frequency
<a href="#">View</a>	05/28/2010	Jane, Smith Q	Community Service	Weekly
<a href="#">View</a>	07/30/2010	Morgan, William John	AA/NA Meeting	Daily
<a href="#">View</a>	06/30/2010	Moore, Shelby Leigh	Phase 1 Group	Weekly
<a href="#">View</a>	06/01/2010	Fletcher, Irwin Maurice	Phase 1 Group	Weekly
<a href="#">View</a>	06/01/2010	Morgan, William John	Phase 1 Group	Weekly
<a href="#">View</a>	06/01/2010	Thompson, Hunter Samuel	Phase 1 Group	Weekly
<a href="#">View</a>	06/01/2010	Jane, Smith Q	Phase 1 Group	Weekly

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## 1.7 Using the Clients Perspective

The Clients perspective in iMs Connexis provides the user a place to manage a client's record. From this perspective, the user can enter and manage the client's information regarding all of the following:

- Demographics
- Court Information including Cases, Charges, and Sanctions
- Treatment Evaluations, Plans, and Team Meetings
- Calendar of scheduled events for the Client
- Notes
- Activities and Activity Attendance
- History
- Reporting
- Account Balances
- Documents
- Drug Testing



**Moore, Shelby Leigh**

ID: 2020202  
DOB: 1976-03-10 (Age: 34)

Organization: iMs Helps Org  
Site: iMs Helps Site  
Program: iMs Helps Court Program  
Affinity Group: Court Group

Milestone: Milestone 1  
Prognosis: Guarded

**Legal**

- Tracking Number
- Assessments
- Case Information
- Charge
- Court Schedule
- Custody
- Petition
- Obligation
- Referral Contract
- Sanction/Incentive
- Seven Day Letter
- Violation
- Warrant

**Create Case Information**

Case Number\*

Open Date

BAC

Refused BAC Test

Arrest Date

Arresting Agency

UTC Number

Bond Amount

Bond Set Date

Bond Post Date

Bond Status

Defender

### 1.7.1 How to Create a Client

Users can create a client by selecting the "Create Client" button on the Clients Search Screen.

#### **To Create a Client in iMs Connexis:**

1. Click on the Clients link in the Main Links Toolbar.
2. Click on the "Create Client" button that appears in the bottom left of the Clients Search screen.
3. Enter all required information (indicated by red stars) including the Initial Placement.
4. Enter all other necessary information in the provided fields.
5. Click the "Create" button that appears in the bottom left corner of the screen.

Main		Agency	
Client Id*		<input type="text"/>	
Social Security Number		<input type="text"/>	<input type="text"/>
Name	First	<input type="text"/>	
	Middle	<input type="text"/>	
	Last	<input type="text"/>	
	Maiden	<input type="text"/>	
Initial Placement*		Select <input type="button" value="v"/>	
Ethnicity		Select <input type="button" value="v"/>	
Gender*		Select <input type="button" value="v"/>	
Date of Birth		<input type="text"/> <input type="button" value="calendar"/>	
Height		<input type="text"/>	
Weight		<input type="text"/>	
Hair Color		Select <input type="button" value="v"/>	
Eye Color		Select <input type="button" value="v"/>	
Identifying Marks		<input type="text"/>	
Relationship Status		Select <input type="button" value="v"/>	
Language		Select <input type="button" value="v"/>	
Needs Interpreter		<input type="checkbox"/>	
Reading Ability		Select <input type="button" value="v"/>	
Writing Ability		Select <input type="button" value="v"/>	
DUI Offender		<input type="checkbox"/>	
Sex Offender		<input type="checkbox"/>	
Drivers License State		Select <input type="button" value="v"/>	
Drivers License Number		<input type="text"/>	

## 1.7.2 Client Placement

All clients must be assigned to at least one placement in iMs Connexis. When the client is created, he or she is assigned to the Site level based on the "Initial Placement" option selected. Only users who have permissions to view that placement will be able to view the client in iMs Connexis. Because the initial placement only includes the Organization and Site levels, the user will be automatically placed in a Program and Affinity Group named "Intake." The user MUST go into the Placement screen and edit the existing placement to include the correct Program and Affinity Group before entering data under the Court, Treatment, or Notes sections. If the user does not update the existing placement, the data could be filtered to the Intake placement group rather than the correct placement.

Additional placements can be created for the client. These can be used to allow other users to view and enter data for a client without risk of displaying information which that user should not view. (See OSPA: Client Data Filtering for more details.)

**Edit Placement**

Organization \* iMs Helps Org

Site \* iMs Helps Site

Program \* iMs Helps Court Program

Affinity Group \* Court Group

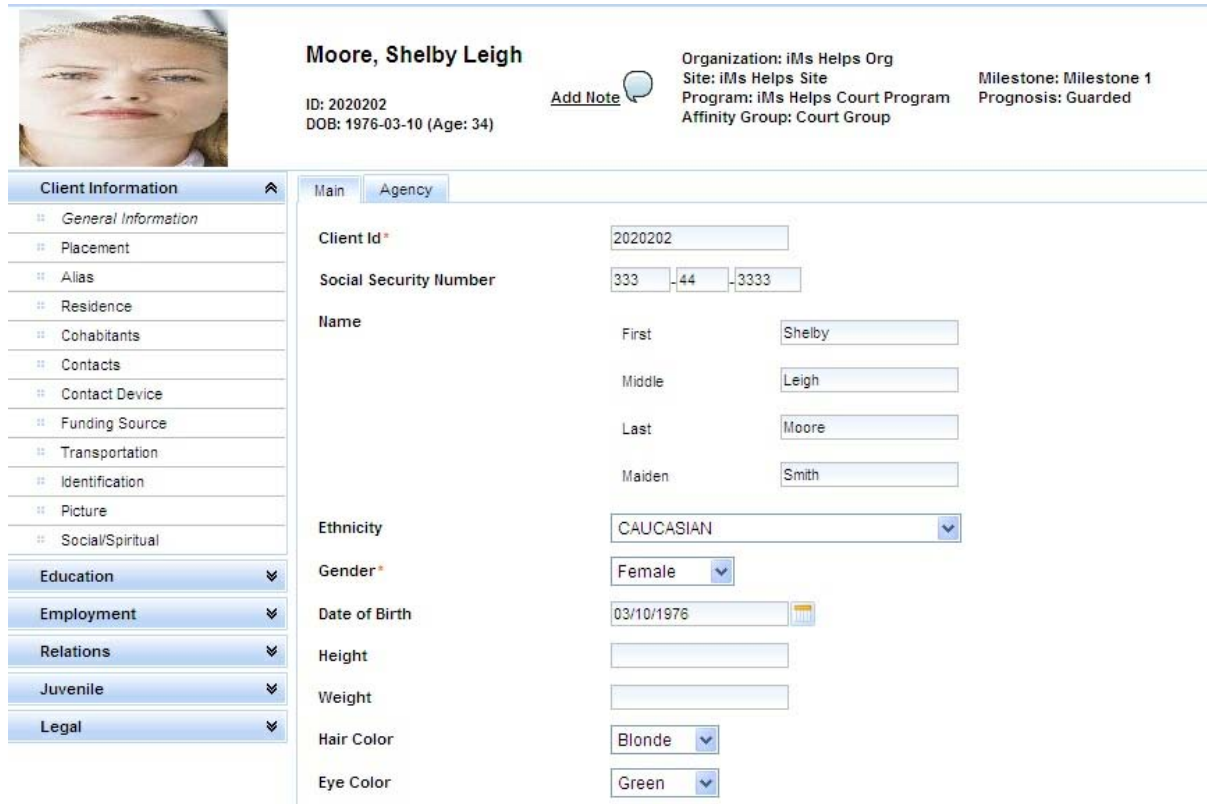
Comments  
Created on 4/25/10

Update End Revert Cancel

### 1.7.3 Demographics Section

This section provides users a place to easily view and enter demographic data for a client. This data is not filtered by the user's placement permissions to prevent the need for dual entry of data.

The user may navigate to each of the menu options available in the Demographics section by clicking on the title of the menu category. All sub-categories will display below the selected menu section.



**Moore, Shelby Leigh**

ID: 2020202  
DOB: 1976-03-10 (Age: 34)

Organization: iMs Helps Org  
Site: iMs Helps Site  
Program: iMs Helps Court Program  
Affinity Group: Court Group

Milestone: Milestone 1  
Prognosis: Guarded

[Add Note](#)

**Client Information**

- General Information
- Placement
- Alias
- Residence
- Cohabitants
- Contacts
- Contact Device
- Funding Source
- Transportation
- Identification
- Picture
- Social/Spiritual

**Education**

**Employment**

**Relations**

**Juvenile**

**Legal**

Main Agency

**Client Id\*** 2020202

**Social Security Number** 333 -44 -3333

**Name**

First: Shelby  
Middle: Leigh  
Last: Moore  
Maiden: Smith

**Ethnicity** CAUCASIAN

**Gender\*** Female

**Date of Birth** 03/10/1976

**Height**

**Weight**

**Hair Color** Blonde

**Eye Color** Green

### 1.7.3 Upload a Picture

The "Pictures" option in the Client Demographics Menu provides a place for users to upload pictures for a client. The Pictures list will display all pictures that have been uploaded to this screen. The most recent picture that has been uploaded will display in the Client bar.

#### To Upload a Client Picture:

- 1.

### 1.7.4 Court Section

The Court section of the Clients perspective allows the user to manage Court-specific data regarding the client. This includes Case Information, Charges, Sanctions/Incentives, etc.


#### To View the Court Dashboard and Menu:

1. Click on the Clients link in the Main Links Toolbar.
2. Enter search criteria to select a client.
3. Click the "View" link that appears to the left of the client's name in the search results.
4. Click on the "Court" link that appears in the Client Toolbar.
5. Click on the correct Tracking Number link that appears in the list.
6. The screen will refresh to display the Court Dashboard and Menu based on the information saved under that Tracking Number.

Home | Calendar | Clients | Activities | Reports | Settings


User: Consultant  
Last login: 05/12/2010 19:53  
Last location: 192.168.1.103  
[Logout](#)

Demographics | **Court** | Treatment | Activities | Calendar | Notes | History | Reports | more


 **Oldacre, Bradley Joe**  
ID: 2412  
DOB: 1977-09-29 (Age: 32) [Add Note](#)

O: iMs Helps Org  
S: iMs Helps Site  
P: Intake  
A: Intake

Milestone: Milestone 1  
Prognosis: Guarded

**Legal** 

- Tracking Number
- Assessments
- Case Information
- Charge
- Court Schedule
- Custody
- Petition
- Obligation
- Referral Contract
- Sanction/Incentive
- Seven Day Letter
- Violation
- Warrant

**Case Management** 

**Tracking Number**

Tracking Number: 365881  
Case Manager: Consultant  
Referral Source: DUI Court  
Referral Date: 05/12/2010 12:00  
Organization: iMs Demo Treatment Center  
Site: iMs Treatment Site1  
Program Assessed: 05/14/2010 12:00  
Entered By: Consultant  
Entered Date: 05/12/2010 22:32  
[Edit](#) | [Change Program Status](#) | [Change Legal Status](#)

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## 1.7.4 Tracking Number







Enter topic text here.

### 1.7.4 Tracking Number

#### **To Create a Tracking Number:**

1. Click on the Clients link in the Main Links Toolbar.
2. Enter search criteria to select a client.
3. Click the "View" link that appears to the left of the client's name in the search results.
4. Click on the "Court" link that appears in the Client Toolbar.
5. Click on the "Add Tracking Number" link.
6. Enter all required information (indicated by red stars).
7. Enter all other necessary information in the provided fields.
8. Click the "Create" button that appears in the bottom left corner of the screen.




**Add Tracking Number**

Tracking Number *	<input type="text"/>
Organization *	Select 
Site *	Select 
Referral Source	Select 
Referral Date	<input type="text"/> 
Program Assessed	<input type="text"/> 
Case Manager	Select 

#### 1.7.4 Tracking Number

#### 1.7.4 Obligations

**Create Obligation**

Type *	Activity Obligation 
Description	<input type="text"/>
Complete By	<input type="text"/> 
Activity Type *	Select 
Required Units *	<input type="text"/>
Comments	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>

1.7.4 Referral Contracts

Create Referral Contract

Site \* iMs Treatment Site1

Clinical Impression

Program Recommendations

Obligations

Select	Type	Description	Complete By	Specification
<input type="checkbox"/>	Obligation	Complete Life Essay		
<input type="checkbox"/>	Employment Obligation		06/30/2010 12:00	
<input type="checkbox"/>	Obligation	Complete Orientation Packet	05/31/2010 12:00	

Create Cancel

## 1.7.5 Treatment Planning

### 1.7.5 Clinical Diagnosis

The Clinical Diagnosis screen allows the user to create and save multiple diagnoses for a client. This diagnosis can be tied to Problems listed on the client's treatment plan.

#### **To Create a Clinical Diagnosis:**

1. Click on Client in the Main Link Toolbar.
2. Search for and select the client.
3. Click on the Treatment link in the Client Toolbar
4. Select the "Treatment Planning" category from the Treatment Menu
5. Click on the "Clinical Diagnosis" option that appears on the treatment menu.
6. Select the Diagnostician from the provided drop down list.
7. Use the Calendar Tool to select the Date and Time when the client was diagnosed.
8. Enter all necessary information in the remaining fields.
9. Indicate if the diagnosis is primary by clicking on the "Primary" check box
10. Select a Severity type from the drop down list
11. Select a Diagnosis from the drop down list.
12. Click on any applicable specifiers that may appear once the diagnosis is selected.
13. Click on the "Add" link that appears to the left of the "Diagnoses" section
14. Repeat steps 9 - 13 to add any additional diagnoses.
15. Click on the "Create" button

Create Client Diagnosis

Diagnostician\*

Diagnosed\*

Current GAF

Expected Discharge GAF

Comments

Action	Primary	Severity	Diagnosis	Specifiers
<a href="#">Add</a>	<input type="checkbox"/>	Moderate	Axis 1 - 290.11 - Dementia of the Alzheimer's Type, With Early Onset, With Delirium	

### 1.7.5 Problems

The Client's Treatment Plan requires Problems be identified. To allow treatment professionals to track traceability, each problem can be tied to a clinical diagnosis, assessment, assessment section, and a supporting document. The problem requires a common problem name be selected from the drop down list and additional information regarding that problem can be added to the "Description" field which allows free text. To track the client's progress with each problem, the user is required to select a problem type and status. When a client's problem has been addressed as required by the treatment plan, the user may edit a problem's status and select the "Resolved" option.

#### **To Create a Problem:**

1. Click on Client in the Main Link Toolbar.
2. Search for and select the client.
3. Click on the Treatment link in the Client Toolbar
4. Select the "Treatment Planning" category from the Treatment Menu
5. Click on the "Problem" option that appears on the treatment menu.
6. If applicable, enter any necessary data in the "Traceability" section of the screen.
7. Select the Problem from the drop down list.
8. Enter a more detailed description regarding the client's problem.
9. Select a Problem Type from the drop down list
10. Select a Status from the drop down list.
11. Click on the "Create" button

**Create Client Problem**

**Traceability**

Clinical Diagnosis:

Assessment:

Assessment Section:

Supporting Document:

Name:

Description:

Type:

Status:

View	Clinical Diagnosis	Name	Description	Type	Status	Status Change date	Entered By
<input type="checkbox"/>	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
<input type="checkbox"/>	300.02 - Generalized Anxiety Disorder (GAD)	3 - Fear of Public Places	Often becomes fearful in uncommon surroundings	Mental	Open	11/02/2009	Demo, David
<input type="checkbox"/>	xxx.xx - Substance-Related Disorders	5 - Drug Seeking Behavior	Exhibits Drug Seeking Behavior on a Daily Basis	Addiction	Open	11/02/2009	Demo, David
<input type="checkbox"/>	xxx.xx - Substance-Related Disorders	6 - Abuse of Drugs to Feel Normal	Daily Use/Abuse for General Functioning	Addiction	Open	11/02/2009	Demo, David
<input type="checkbox"/>	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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### 1.7.5 Goals

The Client's Treatment Plan requires the user to identify Goal and Target Dates for the client to complete during treatment. To allow treatment professionals to track traceability, each goal must be associated with an existing problem. The goal requires a Target Date. When a client's goal has been completed as required by the Treatment Plan, the user may edit the goal's status and select the "Resolved" option. If the status of a Goal has not been changed before the Target Date, the client's goal will appear under the "Expired Goal" section of the Home Dashboard.

#### **To Create a Goal:**

1. Click on Client in the Main Link Toolbar.
2. Search for and select the client.
3. Click on the Treatment link in the Client Toolbar
4. Select the "Treatment Planning" category from the Treatment Menu
5. Click on the "Goal" option that appears on the treatment menu.
6. Use the Calendar Icon to select a Target Date for the Goal.
7. Enter a detailed description regarding the client's Goal.
8. Select one or more existing Problems with which the objective should be associated
9. Select an Goal Type from the drop down list.
10. Select a Status from the drop down list.
11. Click on the "Create" button

Target Date \*

Description \*

Problems

- Generalized Anxiety Disorder (GAD) - Be
- Generalized Anxiety Disorder (GAD) - Of
- Substance-Related Disorders - Exhibits D
- Substance-Related Disorders - Daily Use
- Substance-Related Disorders - Uses Alc

Type \*

Status \*

View	Problems	Description	Type	Entered By	Established	Target Date	Status	Status Changed
<input type="checkbox"/>	Substance-Related Disorders - Exhibits Drug Seeking Behavior on a Daily Basis	Attend AA/NA Meetings Daily for 90 Days	Short term	Demo, David		01/30/2010	Open	10/23/2009
<input type="checkbox"/>	Generalized Anxiety Disorder (GAD) - Becomes Anxious when he feels he is being left alone in public or private.	Minimize Anxious Feelings By One Level Each Week	Short term	Demo, David		12/31/2009	Open	10/23/2009
<input type="checkbox"/>	Substance-Related Disorders - Uses Alcohol to Control Foot Pain	Find an Alternative Method to Dealing with Pain Outside of Alcohol Use	Short term	Demo, David		12/31/2009	Open	10/23/2009

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### 1.7.5 Objectives

The Client's Treatment Plan requires the user to identify Objectives and goal dates for the client to complete those objectives. To allow treatment professionals to track traceability, each objective must be associated with an existing goal. The Objective requires a Target Date. When a client's Objective has been completed as required by the Treatment Plan, the user may edit a problem's status and select the "Resolved" option. If the status of an Objective has not been changed before the Target Date, the client's objective will appear under the "Expired Objectives" section of the Home Dashboard.

#### To Create an Objective:

1. Click on Client in the Main Link Toolbar.
2. Search for and select the client.
3. Click on the Treatment link in the Client Toolbar
4. Select the "Treatment Planning" category from the Treatment Menu
5. Click on the "Objective" option that appears on the treatment menu.
6. Use the Calendar Icon to select a Target Date for the Objective.
7. Enter a detailed description regarding the client's Objective.
8. Select an existing Goal with which the objective should be associated
9. Select an Objective Type from the drop down list.
10. Select a Status from the drop down list.
11. Click on the "Create" button

**Create Client Objective**

Target Date\*

Description\*

Goal\*

Type\*

Status\*

View	Goal	Description	Type	Entered By	Established	Target Date	Status	Status Changed
<input type="checkbox"/>	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
<input type="checkbox"/>	Minimize Anxious Feelings By One Level Each Week	Write in Anxiety Journal Each Day	Therapeutic	Demo, David		12/31/2009	Open	10/23/2009
<input type="checkbox"/>	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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## 1.7.6 Activities Section

### 1.7.6 Client Activity Plans

The Activity Plan screen allows the user to specify which activities the client is required to attend and the number of participations required for that activity. The iMs Connexis application will calculate the number of participations completed as the activity attendance is entered for the client. This screen requires that the user select an Expected Completion Date for the Activity Plan. When the requirements for an Activity Plan are not met before the Expected Completion Date, the client will appear under the "Expired Activity Plans" section of the Home Perspective.

**NOTE: The user must create an Activity Plan before enrolling the client in Activities.**

#### To Create an Activity Plan:

1. Click on Client in the Main Link Toolbar.
2. Search for and select the client.
3. Click on the Treatment link in the Client Toolbar
4. Select the "Case Management" category from the Treatment Menu
5. Click on the "Activity Plans" option that appears on the treatment menu.
6. Select an Activity from the drop down list
7. Enter the number of required participations
8. Use the Calendar Tool to enter the Expected Completion Date for the Activity Plan
9. Select the applicable Frequency from the provided drop down list
10. Enter the Duration in minutes
11. Select the user that will be responsible for managing the client's attendance for that activity
12. Click on the "Create" button

**Edit Client Activity Plans**

Activity \*

Required Participations

Expected Completion Date \*

Frequency \*

Duration

Responsible Party \*

View	Activity	Required Participations	Expected Completion Date	Frequency	Duration	Responsible Party
<input type="checkbox"/>	AA Meeting	90	12/31/2009	Daily	60	Demo, David
<input type="checkbox"/>	Pain Managment Journaling	60	12/31/2009	Daily	5	Demo, David
<input type="checkbox"/>	Anxiety Journaling	60	12/31/2009	Daily	5	Demo, David
<input type="checkbox"/>	Exercise	15	12/31/2009	Weekly	60	Demo, David

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## 1.7.6 Activity Enrollment

The Activity Enrollment Screen is organized into three sections:


- Planned Client Activities – Displays the Activity Plans that have been created for a Client.
- Currently Scheduled Activities – Lists each activity schedule in which the client is enrolled.
- 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.

[Home](#) | [Calendar](#) | [Clients](#) | [Activities](#) | [Reports](#) | [Settings](#)

User: Consultant  
 Last login: 05/14/2010 09:17  
 Last location: 192.168.1.103  
[Logout](#)


---

[Demographics](#) | [Court](#) | [Treatment](#) | [Activities](#) | [Calendar](#) | [Notes](#) | [History](#) | [Reports](#) | [more](#)



**Oldacre, Bradley Joe**

ID: 2412  
DOB: 1977-09-29 (Age: 32)

Add Note 

O: iMs Helps Org  
 S: iMs Helps Site  
 P: Intake  
 A: Intake

Milestone: Milestone 1  
 Prognosis: Guarded

[Activity Plans](#)  
[Activity Enrollment](#)  
[Activity Attendance](#)  
[Activity Completions](#)

**Planned Client Activities**

Action	Activity	Num Participations	Expected Completion	Frequency	Duration (minutes)	Responsible Party
<a href="#">View</a>	Community Service	5	06/11/2010 00:00	Weekly	30	Consultant

**Currently Scheduled Activities**

Action	Activity	Site	Schedule	Instructor	Start Date	End Date	Duration (minutes)	Recurrence	Interval
<a href="#">Add</a>	iMs Helps Site	Community Service	Community Service Hours	Consultant	04/28/2010 12:00		60	Ad hoc	1

**Available Schedules**

Action	Site	Activity	Schedule Name	Instructor	Start Date	End Date	Duration (minutes)	Recurrence	Interval
<a href="#">Add</a>	iMs Helps Site	Community Service	Community Service Hours	Consultant	04/28/2010 12:00		60	Ad hoc	1

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### 1.7.6 Scheduled Activity Attendance

Users can use the Activity Attendance screen in the Clients view to manage the client's attendance for scheduled activities. When the user selects the View link for an Activity, the correct attendance status can 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 completes all requirements for the activity as set in the Activity plan, the user may click on the "Completed" check box to indicate the requirements have been met. This will remove the client from any future occurrences of that Activity schedule and the activity will appear in the Activity Completions screen.

The Activity Attendance numbers that appear on both the Activities and Treatment Dashboards reflect the requirements set in the Activity Plan. When the user changes the attendance status for an Activity occurrence, these numbers will calculate accordingly.

#### **To Save an Attendance Status for a Scheduled Activity:**

1. Click on Client in the Main Link Toolbar.
2. Search for and select the client.
3. Click on the Activities link in the Client Toolbar
4. Click on the "Activity Attendance" option that appears on the Activities menu.
5. Click on the View button next to the correct Activity and Meeting Date/Time
6. The Activity can be edited in the top portion of the Activity Attendance screen.
7. Select the Status from the drop down list
8. Enter any notes related to the client's participation in the activity
9. Click on the "Save" button

Class Attendance/Notes - AA Meeting - 10/28/2009 12:00

Name	Status	Comment
Oldacre, Bradley Joe	Present	

Save

Record Activity Attendance			
View	Activity	Meeting Date/Time	Location
	AA Meeting	10/28/2009 12:00	
	AA Meeting	10/28/2009 12:00	
	AA Meeting	10/30/2009 12:00	
	AA Meeting	11/02/2009 12:00	

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### 1.7.6 Ad Hoc Activity Attendance

In addition to scheduled activities, iMs Connexis allows users to manage the client's attendance for unscheduled activities such as AA Meetings or Community Service hours. These unscheduled activities are called Ad Hoc Activities. The user may enter attendance records for Ad Hoc Activities by clicking on the activity's link that appears in blue on the Activities Dashboard in the Clients view.

When the client completes all requirements for the activity as set in the Activity plan, the user may click on the "Completed" check box to indicate the requirements have been met. This will remove the client from any future occurrences of that Activity schedule and the activity will appear in the Activity Completions screen.

The Activity Attendance numbers that appear on both the Activities and Treatment Dashboards reflect the requirements set in the Activity Plan. When the user changes the attendance status for an Activity occurrence, these numbers will calculate accordingly.

#### **To Save an Attendance Status for an Ad Hoc Activity:**

1. Click on Client in the Main Link Toolbar.
2. Search for and select the client.
3. Click on the Activities link in the Client Toolbar
4. Click on the blue link for an activity showing in the Activities Dashboard.
5. Enter the Meeting Date/Time for the activity.
6. Select the Status from the drop down list.
7. Enter any comments related to the client's participation in the activity
8. Enter the correct number of occurrences for the activity.
9. Click on the "Save" button



The screenshot shows a web form titled "Create Ad hoc Attendance for Phase 1 Group". The form contains the following fields and controls:

- Meeting Date/Time \***: A text input field with a calendar icon to its right.
- Location**: A text input field.
- Attendance Status \***: A dropdown menu with "Present" selected.
- Performance Rating \***: A dropdown menu with "Good Participation" selected.
- Comments**: A text area with up and down arrow icons on the right side.
- Num. Occurrences \***: A spinner control showing the number "1".
- Completed**: A checkbox that is currently unchecked.
- Add**: A blue button at the bottom left of the form.

### 1.7.6 Activity Completions

After the client completes the required participations listed for an activity plan and the user selects the "Completed" check box on one of the attendance screens, that activity will appear in the list on the Activity Completions screen. This will allow users to review a history of all activity requirements the client has completed to date.

The screenshot displays the user interface for the iMs Connexis system. At the top, there is a navigation bar with links for Home, Calendar, Clients, Activities, Reports, and Settings. The user's name, Consultant, and login details (Last login: 05/14/2010 09:17, Last location: 192.168.1.103) are shown in the top right corner. Below the navigation bar, there is a secondary menu with links for Demographics, Court, Treatment, Activities, Calendar, Notes, History, Reports, and more. The main content area features a profile for Oldacre, Bradley Joe, including a photo, ID (2412), DOB (1977-09-29, Age: 32), and an Add Note button. To the right of the profile, there are details for the client's organization (iMs Helps Org, iMs Helps Site), intake status (Intake), and a milestone (Milestone 1, Prognosis: Guarded). Below the profile, there is a table titled 'Activity Completions' with columns for Activity, Completed, and Instructor. The table contains one entry: Community Service, completed on 05/14/2010 at 13:39, by Consultant. A sidebar on the left shows a list of activities: Activity Plans, Activity Enrollment, Activity Attendance, and Activity Completions. The footer of the page indicates the version is 1.3.0 (0) and includes a copyright notice for 2009 iMs.

Activity	Completed	Instructor
Community Service	05/14/2010 13:39	Consultant

### 1.7.7 Calendar Section


The Client Calendar displays a list of each activity or important Target Date scheduled for a client. This includes target dates for Goals and Objectives, Treatment Plan Revision Dates, scheduled court activities, as well as all other activity dates. This calendar can be viewed in one of three formats - Day, Week, or Month; however, the Calendar defaults to the Month format. The user can navigate back and forth within any given format by clicking on the forward and back arrows that appear in the top left corner of the Calendar screen.

[Home](#) | [Calendar](#) | [Clients](#) | [Activities](#) | [Reports](#) | [Settings](#)

User: Consultant  
 Last login: 05/14/2010 10:20  
 Last location: 192.168.1.103  
[Logout](#)

---

[Demographics](#) | [Court](#) | [Treatment](#) | [Activities](#) | [Calendar](#) | [Notes](#) | [History](#) | [Reports](#) | [more](#)



**Oldacre, Bradley Joe**

ID: 2412  
DOB: 1977-09-29 (Age: 32)

[Add Note](#)

O: iMs Helps Org  
S: iMs Helps Site  
P: Intake  
A: Intake

Milestone: Milestone 1  
Prognosis: Guarded

◀ ▶
today

May 2010

month
week
day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7 <span style="background-color: yellow; font-size: 0.7em;">12:00 - 12:00 Employee Appreciation Day</span>	8
9	10	11 <span style="background-color: blue; color: white; font-size: 0.7em;">12:00 - 12:00 AA/NA Meeting</span>	12	13 <span style="background-color: blue; color: white; font-size: 0.7em;">12:00 - 13:00 Community Service</span>	14 <span style="background-color: yellow; font-size: 0.7em;">12:00 - 13:00 Community Service</span>	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4 <span style="background-color: yellow; font-size: 0.7em;">12:00 - 12:00 Employee Appreciation Day</span>	5

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## 1.7.8 Notes Section

### 1.7.8 Create a Note

Enter topic text here. Users can create treatment notes from all Client-specific screens in iMs Connexis by selecting the Universal Note icon which appears in the Client Bar across the top of the screen. Treatment notes can be associated with any existing Problem, Goal, and/or Objective. The most recent note associated with a problem, goal and objective will appear on the Client's Treatment Dashboard. Notes can be set as "Private" which limits access to this note to only the user who created the note; all other users can open the Notes screen and see that a note was added but cannot view the note itself. Users can also set notes as "Exportable" which means they can be viewed by any user who has permissions to see the client regardless of the selected placement.



### To Create a Note:

1. Select the Universal Note Icon labeled "Add Note" in the Client Bar.
2. Select the Note Type from the provided drop down list.
3. Enter a Date/Time using the Calendar Tool.
4. If applicable, select a Problem, Goal, and/or Objective with which the note should be associated.
5. Select "Exportable" or "Private" if applicable.
6. Enter the note in the provided field using any formatting options where appropriate.
7. Left click on "Add."

**NOTE:** If the user has permissions to see more than one placement for a client, the user must select which Placement should be active for a note by clicking on the "Make Active" link that appears below a placement in the Client bar. The green border indicates which placement is active. Users that do not have permissions to see the selected placement will not be able to view that note unless the "Exportable" box is selected when adding the note.

### 1.7.8 View and Print Notes

The Notes screen displays a history of all notes that have been entered for the client. This list will be filtered according to the user's permissions. The user may print a note by clicking on the Printer icon next to the correct 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.									
<ul style="list-style-type: none"> <li>Will be discussing this with her family</li> <li>Will make appt with dr to see about possible prescription for depression</li> </ul>									

### 1.7.9 History

The History section of the Clients perspective allows the user to review a history of all notes, records, activities, etc that have been entered for a client. The user may use the provided "Start" and "End" fields to filter the entries to only those items created during the specified date range.

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. <ul style="list-style-type: none"> <li>Will be discussing this with her family</li> <li>Will make appt with dr to see about possible prescription for depression</li> </ul>
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.

#### 1.7.10 More

Enter topic text here.

#### 1.7.10 Accounting

The Accounting section in a client's record will be separated into accounts based on the client's placements. Each site will have its own account. To view or manage fees and payments for a client, the correct account must be selected. The user may enter fees in one of three ways - ad hoc fees, sanction fees, and activity fees.


If the user enters a fee associated with a sanction or activity which is assigned to a client, that fee will automatically show in the correlating site's account. Ad Hoc Payments (those not associated with a

sanction or activity), all fees, and any account adjustments must be added on the Accounting screen. Users cannot edit or delete a fee; if an adjustment should be made, the user should select the correct adjustment type from the provided drop down list. The user may print a ledger that displays a history of all fees, payments, and adjustments created for a client. The balance will automatically be calculated based on the entries made in the client's account(s). This balance will always display in the Client bar.

[Home](#)
[Calendar](#)
[Clients](#)
[Activities](#)
[Reports](#)
[Settings](#)

User: Consultant  
 Last login: 05/14/2010 09:17  
 Last location: 192.168.1.103  
[Logout](#)

Demographics
Court
Treatment
Activities
Calendar
Notes
History
Reports
more



**Oldacre, Bradley Joe**

ID: 2412  
DOB: 1977-09-29 (Age: 32)

[Add Note](#)

O: iMs Helps Org  
S: iMs Helps Site  
P: Intake  
A: Intake

Milestone: Milestone 1  
Prognosis: Guarded

**Accounts**

Creditor ↕	Balance ↕	Updated ↕	Created ↕
<a href="#">iMs Helps Site</a>	0.00	05/11/2010 11:15	05/11/2010 11:15
<a href="#">iMs Treatment Site1</a>	20.00	05/14/2010 10:46	05/12/2010 22:32
	20.00		

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### 1.7.10 Assessments

The Assessments screen allows the user to record information regarding the client's assessments scores. Assessment types and sections are created and managed in the Settings perspective. If the assessment has been created in the Settings, the user can choose to save the client's scores only or a record of the client's answers for which iMs Connexis will calculate the assessment scores for the user. This screen also allows users to view and print the client's saved assessments.

#### **To Save Assessment Scores Only:**

1. Click on Client in the Main Link Toolbar.
2. Search for and select the client.
3. Click on the Treatment link in the Client Toolbar
4. Select the "Assessments" category from the Treatment Menu
5. Click on the "Assessments" option that appears under the "Assessments" category heading.
6. Click on the "New Client Assessment" button.
7. Select the Assessment from the provided drop down list.
8. Select the name of the Proctor from the drop down list.
9. Use the Calendar Tool to select the Date and Time the Assessment was taken.
10. Click on the "Enter Scores Only" if applicable.
11. Click on the "Next" button
12. Enter the Score for each Assessment Section
13. If applicable, select the browse button to locate and select a supporting document.
14. Click on the "Next" button
15. Click on the "Save" button


#### **To Enter Answers and Score Assessments:**

1. Click on Client in the Main Link Toolbar.
2. Search for and select the client.
3. Click on the Treatment link in the Client Toolbar
4. Select the "Assessments" category from the Treatment Menu
5. Click on the "Assessments" option that appears under the "Assessments" category heading
6. Click on the "New Client Assessment" button.
7. Select the Assessment from the provided drop down list.
8. Select the name of the Proctor from the drop down list.
9. Use the Calendar Tool to select the Date and Time the Assessment was taken.
10. Click on the "Next" button
11. For each assessment question, select the correct answer(s) and click on the "Next" button.
12. Click on the final "Save" button.

Home | Calendar | Clients | Activities | Reports | Settings

User: Consultant  
Last login: 05/11/2010 14:23  
Last location: 192.168.1.167  
[Logout](#)

Demographics | Court | Treatment | Activities | Calendar | Notes | History | Reports | more



**Oldacre, Bradley Joe**

ID: 2412  
DOB: 1977-09-29 (Age: 32)

[Add Note](#)

O: iMs Helps Org  
S: iMs Helps Site  
P: Intake  
A: Intake

[New Client Assessment](#)

Client Assessments

View	Print	Edit	Delete	Assessment Name	Date Taken:	Proctor	Score	Section Scores	Supporting Document
<a href="#">View</a>		<a href="#">Edit</a>	<a href="#">Delete</a>	Example Assessment	05/11/2010 16:08	Consultant	5	Response Types 3 Section 1 1 Section 2 1	

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### 1.7.10 Drug Tests History

The Drug Tests screen will display a history of all the client's drug test information; this includes both manually entered drug test results as well as the results imported from the WinTOX lab.

Specimen Id\*

Type

Collector

Collected At\*

Tested At\*

Entered At

Outcome\* Select

Illo Show

Rx Drugs Taken

Rx Drugs Comments

Rx Verified

Illo Rx Drugs Used

Amount Due

Amount Collected

Admitted Drug Use

Comments

Assay Results

AMPH	Select	<input type="text"/>	AMPH 300	Select	<input type="text"/>
AMPH 500	Select	<input type="text"/>	Alcohol	Select	<input type="text"/>
Amphetamines	Select	<input type="text"/>	BARB	Select	<input type="text"/>
BENZ	Select	<input type="text"/>	BENZ 200	Select	<input type="text"/>
Benzodiazepines	Select	<input type="text"/>	COCN	Select	<input type="text"/>
COCN 150	Select	<input type="text"/>	CREAT	Select	<input type="text"/>
Cocaine	Select	<input type="text"/>	ETOH	Select	<input type="text"/>
EIG	Select	<input type="text"/>	EIG 500	Select	<input type="text"/>
GHB	Select	<input type="text"/>	HALLUCINOGENS	Select	<input type="text"/>
HEROIN	Select	<input type="text"/>	Inhalants	Select	<input type="text"/>
Ketamine	Select	<input type="text"/>	METH	Select	<input type="text"/>
METHADONE	Select	<input type="text"/>	Marijuana	Select	<input type="text"/>
Methamphetamine	Select	<input type="text"/>	NOSHOW	Select	<input type="text"/>
OPIA	Select	<input type="text"/>	OPIA 300	Select	<input type="text"/>
OTHER	Select	<input type="text"/>	OXYCOTIN	Select	<input type="text"/>
Opiates	Select	<input type="text"/>	PCP	Select	<input type="text"/>
SPGR	Select	<input type="text"/>	Steroids	Select	<input type="text"/>
THC	Select	<input type="text"/>	THC 20	Select	<input type="text"/>

Create
Cancel

### 1.7.10 Summary Note

The Summary screen provides a place for Treatment Professionals to create a treatment plan update note. Each of the client's Problems, Goals and Objectives will display on the Summary screen with a notes box below each. The user may enter a note in the provided notes box which will be automatically tied to that Problem, Goal, or Objective. The user will then be able to print a copy of these notes in an organized report that segments these into different sections.

Problems											
Description	Status										
Alcohol Abuse	Open										
<table border="1"> <thead> <tr> <th>Date/Time</th> <th>Note Type</th> <th>Entered By</th> <th></th> </tr> </thead> <tbody> <tr> <td>04/30/2010 08:47</td> <td>Treatment Note</td> <td>Consultant</td> <td></td> </tr> </tbody> </table> <p>Just testing this.</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p><b>B</b> <i>I</i> <u>U</u> ABC: [Icons]</p>				Date/Time	Note Type	Entered By		04/30/2010 08:47	Treatment Note	Consultant	
Date/Time	Note Type	Entered By									
04/30/2010 08:47	Treatment Note	Consultant									
Self-Medicates for Depression using Alcohol	Open										
<table border="1"> <thead> <tr> <th>Date/Time</th> <th>Note Type</th> <th>Entered By</th> <th></th> </tr> </thead> <tbody> <tr> <td>04/30/2010 07:53</td> <td>Treatment Note</td> <td>Consultant</td> <td></td> </tr> </tbody> </table> <p>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.</p> <ul style="list-style-type: none"> <li>• Will be discussing this with her family</li> <li>• Will make appt with dr to see about possible prescription for depression</li> </ul>				Date/Time	Note Type	Entered By		04/30/2010 07:53	Treatment Note	Consultant	
Date/Time	Note Type	Entered By									
04/30/2010 07:53	Treatment Note	Consultant									

## 1.8 Activities

The iMs Connexis application allows users to create and manage Activities. Activities are designed for users to record clients' attendance for group sessions, court, community service, AA meetings, etc. Activities are separated into three parts - Activity Types, Activities, Activity Schedules. In a statewide system, the Activity Types and Activities are usually managed by a system administrator. The Activity Schedules are filtered on the Site level. Each Site may have multiple schedules for each Activity.

The "Activities" perspective allows the user to create Activity Schedules, manage attendance, and view an attendance history for scheduled group activities.

### 1.8.1 Manage Activity Schedules

The iMs Connexis application filters each Activity Schedule by Site. In order to ensure that activities are filtered correctly, each Activity Schedule must be assigned to a Site and an Instructor when created. The user must also select the exact Start Date and Time and Duration for that Scheduled Activity. These schedules can be set to recur in many different intervals by selecting from the options available in the "Rekurs" drop down list. For example, if the user wishes to create an activity that occurs on the first and third Thursday of each Month, he should select the "Week of the Month" option from the "Rekurs" list. When creating a recurring activity, the "Interval" field requires the user to indicate how often the selected recurrence type will occur. For example, if the user selects "Weekly" in the "Rekurs" drop down lists and enters "1" in the "Interval" field, the activity will be scheduled every week. If "2" is entered in the "Interval" field, the activity would be scheduled every other week. The user may also indicate on which day of the week the activity should occur by clicking on the check box(es) for the day(s) on which the activity should be scheduled. The user may also select "Ad Hoc" from the "Rekurs" drop down list if the Activity does not have a specific schedule (ex. AA / NA Meetings and Community Service).

#### **To Create an Activity Schedule:**

1. Select the "Activities" link from the Main Links Toolbar.
2. Select "Activity Settings" from the menu that appears on the left side of the screen.
3. Click on the View button in the "View Schedules" column next to the correct Activity in the list.
4. Select the correct "Site" from the drop down list.
5. Create a name for the Activity Schedule.
6. Select the correct "Instructor" from the drop down list.
7. Use the Calendar Tool to enter a Start Date/Time for the Activity Schedule.
8. Enter the duration of the activity in minutes. (NOTE: This field only allows numeric characters.)
9. Select the correct type of recurrence for the activity from those available in the "Rekurs" drop down list.
10. Enter the correct interval related to the option selected in the "Rekurs" drop down list.
11. Enter any other necessary information in the available fields.
12. Click on the "Create" button to save the schedule for an activity.

**Edit Activity Schedule**

Site\*

Name\*

Location

Instructor\*

Max Enrollment

Start Date/Time

End Date

Duration (minutes)\*

Recurrence Type\*

Recurrence Interval\*

Fee for Enrollment

Fee if Present

Fee if Absent

Fee if Excused

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

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## 1.8.2 Manage Group Activity Attendance

Users may manage group attendance from the Activities screen by selecting the View button that appears to the left of the correct activity. The list of all clients scheduled for that activity will appear in the top portion of the screen. The user may then select the correct Attendance Status from the available drop down list and enter any comments regarding the client's participation in that activity. When a client has completed the requirements for that activity type, the user may left click on the check box in the "Completed" column to remove the client from any future occurrences of that activity. Once ALL clients have a status selected, click "Save" to save the activity attendance for those clients. It is important to note that Activity Attendance in the Activities perspective must all be entered for all clients enrolled in that activity at one time.

Only users who are marked as the Instructor for an Activity or users set as Attendance Recorders for a site may view and manage attendance on the "Activities" screen.

**NOTE: Attendance Recorders will be managed on the Site level. Any user with Site Level Administration permissions can set a user as an Attendance Recorder.**

View	Activity	Meeting Date/Time	Location	Attendee Count
...	Trash Pickup	10/08/2009 12:00		1
...	Trash Pickup	10/09/2009 12:00		1
...	Trash Pickup	10/10/2009 12:00		1
...	Trash Pickup	10/10/2009 12:00		1
...	Trash Pickup	10/11/2009 12:00		1
...	Trash Pickup	10/11/2009 12:00		0
...	Trash Pickup	10/12/2009 12:00		0
...	AA/NA	10/12/2009 18:00		0
...	Trash Pickup	10/13/2009 12:00		0
...	AA/NA	10/13/2009 12:00		0
...	AA/NA	10/13/2009 18:00		0
...	Trash Pickup	10/14/2009 12:00		0
...	AA/NA	10/14/2009 12:00		0
...	AA/NA	10/14/2009 18:00		0
...	Trash Pickup	10/15/2009 12:00		0

## 1.9 Custom Query

Users can create Custom Query Reports on data saved in iMs Connexis. This feature requires some knowledge of the tables available in the system. At this time, the iMs team suggests that users contact them to help create a Custom Query. A more in depth training and manual will be provided on this in the near future.

**Edit Custom Query**

Name \*

Site

Query Basis \*

**Joins**

Action	Field	Alias	Left Join	Position
<a href="#">Remove</a>	Case Information	ci	false	4
<a href="#">Remove</a>	Case Information:Tracking Number	tr	false	5
<a href="#">Remove</a>	Tracking Number:Client	cle	false	6
<a href="#">Add</a>	<input type="text" value="Select"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="7"/>

**Output Fields**

Action	Field	Prompt	Header	Include in Results	Restriction	Required	Position
<a href="#">Remove</a>	Client Name		Client Name	true		false	1
<a href="#">Remove</a>	Charge Class	Charge Class	Charge Class	true	Equal	true	3
<a href="#">Remove</a>	Charge Type		Charge Type	true		false	4
<a href="#">Remove</a>	Charge Result		Charge Result	true		false	5
<a href="#">Add</a>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="Select"/>	<input type="checkbox"/>	<input type="text" value="6"/>

[Update](#) [Delete](#) [Revert](#) [Cancel](#)

View	Site	Name	Query Basis
<input type="text" value="..."/>		Charge Report	Charge

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### 1.9.1 Generate Custom Query Report

**Reports**

[Address List](#)      [Assessment \(blank\)](#)      [Birthday List](#)      [Cases By Program Status](#)

[Court Appearance List](#)      [Family Staffing](#)      [Legal History Offense Summary](#)      [multipleNoteReport](#)

[Offense Summary](#)      [Sanction/Incentive Summary](#)      [singleNoteReport](#)      [Staffing](#)

[UDS Alert](#)

**Custom Queries**

[Charge Report](#)

