

Client Services Manager (CSM) – Versions

Version/ Feature	CSM-MH Mental Health	CSM-GH Group Home	CSM-AC Assisted Living	CSM-DC Day Center	CSM-PCS Personal Care Services	CSM-PT Physical Therapy	CSM Case Mgt.	CSM-GS Gerontology Services	CSM-CT Clinical Trials	CSM-LAW Law Practice	CSM-PM Property Management	CSM-SE Special Education	CSM-FC Foster Care	CSM Adult Foster Care
Client Manager	X- patient, consumer, person served	X- Resident	X- Resident	X-	X	X	X	X	X - participa nt	X- Defendant	X - tenant	X- Child	X -Child	x-Adult
Document Manager	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Program Manager	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Assignment Manager	X	X	X	X	X	X	X	X	X	X	X	X	X	X
HRS / Personnel Staffing, Training	O	X	X	X	X	X	X	O	X	O	O	O	O	X
Schedules	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Calendars	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Audit Tools	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Forms Wizards	O	X	X	X	X	X	X	X	X	X	X	X	O	X
Meals	-	O	X	O	-	-	-	-	-	-	-	-	-	-
Transportation	-	O	X	O	-	-	-	-	-	-	-	O	-	-
Social	-	O	X	O	-	-	-	-	-	-	-	-	-	-
Concierge Services	-	-	X	-	O	-	-	-	-	-	O	-	-	-
Property Manager	N/A	N/A	N/A	N/A	N/A	N/A		N/A	N/A	N/A	X	N/A	N/A	N/A
Engagement Manager	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Billing	X	X	X	X	X	X	X	X	X	x	X	X	O	X
Meds Admin	O	X	X	O	O	O	O	N/A	X	N/A	N/A	O	O	O
Maintenance	N/A	X	X		N/A	N/A	O	X	N/A	N/A	X	N/A	O	N/A
Family Manager	N/A	N/A	N/A	N/A	N/A	N/A	X	N/A	N/A	N/A	N/A	N/A	X	N/A
Contacts	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Notes	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Work	N/A	X	X	X	O	N/A	N/A	O	N/A	N/A	X	N/A	N/A	N/A
Clinical Trial/ Job Manager	N/A	N/A	N/A	N/A	N/A	N/A	O	N/A	X	O	O	N/A	N/A	N/A
Care manager	N/A	N/A	N/A	N/A	X	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Payables	O	O	O	O	O	O	X	O	X	O	X	O	X	O
Assessments	O	O	O	O	O	O	X	X	O	N/A	N/A	O	O	O
Accounting	O	O	O	O	O	O	O	O	O	O	O	O	O	O
EDI	O	O	O	O	O	N/A	N/A	N/A	N/A	N/A	N/A	N/A	O	O
Web Portal	O	O	O	O	O	O	O	O	O	N/A	O	O	O	O
Job Training	N/A	N/A	N/A	O	N/A	N/A	O	N/A	N/A	N/A	N/A	O	N/A	N/A