





## CSM / MH Client Services Manager Group Home

Client #	Client Name	Program	REF	PREAD	ADM	DISC	SER	RC	Assign	Status	Enrollment
2001	mouse mickie	residential program								New	
2026	mouse mickie	residential program								New	
2029	MINNIE MOUSE	Test Program - JCO 09								Wait List	
1138	...	bridging gaps								Confirmed	

### Program Admissions

- Record Initial Client Data
- Print Bar Coded Consent Forms
- Track Applicants / forms receipt
- Verify applicant data
- Diagnostic / Evaluations

### Client Manager

- Client Profile, Event history
- Contacts
- Consent Forms History, Notifications.
- Geographic Mapping, Google Directions

### Document Management

- Collect and file returned documents
- Attach scanned documents
- Attach files (word docs, e forms, pdf, etc)

### Forms / Reports:

- Admissions (7)
- Assessments( 4)
- Notifications/ Consents (17)
- Progress Notes
- Program Specific Forms
- Community Demographics
- Attendance, Chores, Run Away, Incident, Time Reports, Contact / event histories

### Billing

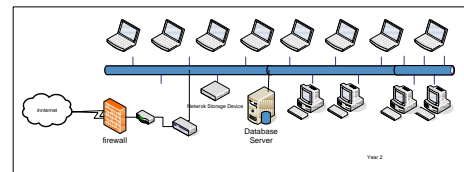
- Open items to be Billed
- Create and manages billing batches
- Take payments
- Statements
- Process bills into Accounting -- Optional
- AP 1009 Payables Contract service Providers - Optional
- AR invoices for billing party - Optional
  - o Programs
  - o Customer
  - o Insurance Carriers
- Electronic Bill submission with optional EDI interface module. - Optional

### Accounting Integration: -- Optional

- Customers: Program, insurance, third party payee
- Vendors: 1009 Service Providers, Employees
- Services and Products
- Pricing by agency/customer/ employee
- Work Locations
- Full mid range accounting AR/AP/GL/PR

### HRS Module

- Scheduling, Staffing --
- Time cards
- Training .... more



### System:

- Multi user, multi-location
- Database Driven (MS SQL)
- Remote/ Web Access (PC, MAC, IPOD, IPAD, Droid)
- Windows XP/Vista/W7 User interface
- Available in the Cloud or On Site**