ADVANTEC
INFORMATION SYSTEMS, LLC
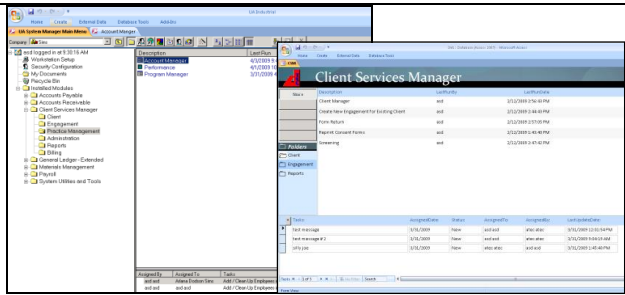
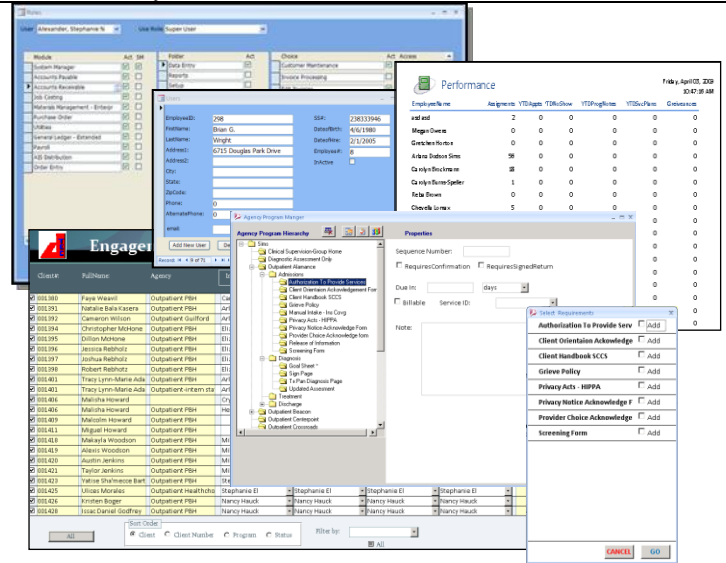# Client Services Manager v2.0

CSM / MH   Client Services Manager Mental Health v2.0

User Interface:
- Easy to use – Menu System
- Stand Alone user interface or Integrated UA Interface - Optional
- Role Specific Security Access
- Assigned access to client data
- Integrated Task Manager:
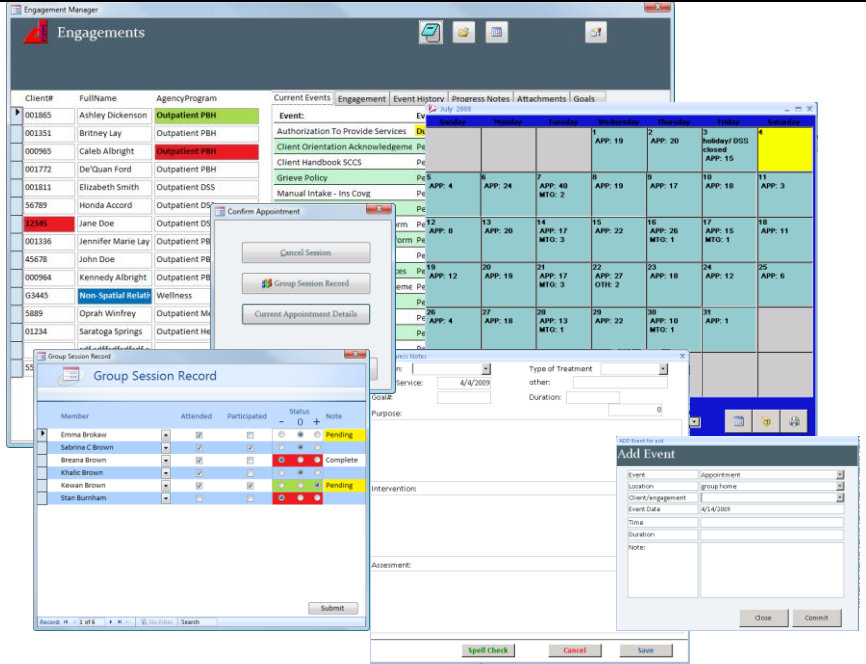   - Allows assignment and tracking of tasks between system users.

Administration/ Practice Management
- **Users**
- **Roles:** support 5 role levels
- **Security –**
    - **Network Level Password**
    - **Application Level password**
- **Program Definition**
    - **Program Rules**
    - **Processing Steps**
    - **Work Items**
        - **Documents**
        - **Tasks**
- **Group(s) Definition**
    - **Assign Members**
- **Account/Engagement Assignment**
    - **Active/inactive**
    - **Assign/ re-assign resource by step**
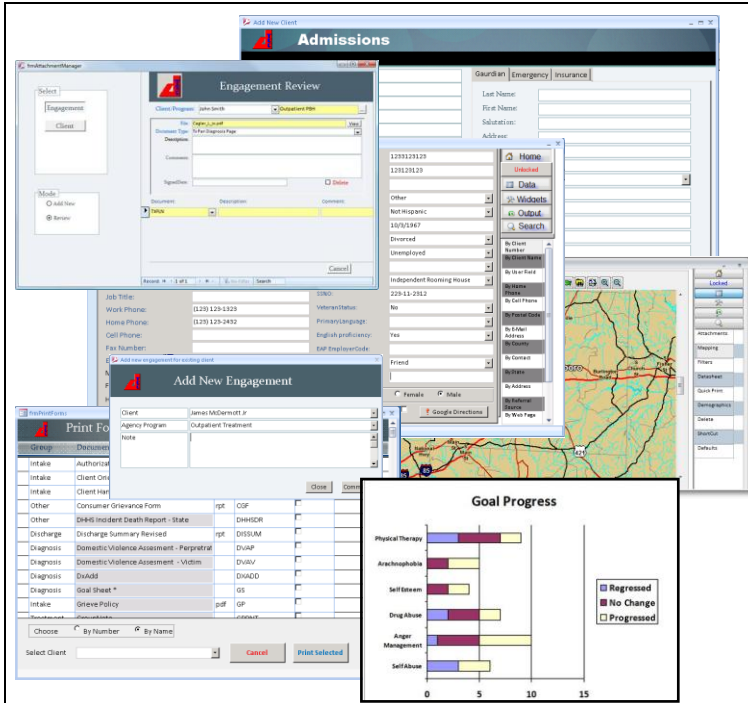- **Performance Management**
    - **Track**

Engagement Manager
- **Client Application Tracking**
- **Client Diagnosis Management**
- **Client Case Management**
- **Group Session Management**
    - **Attendance**
    - **Participation**
    - **Progress**
- **Document tracking**
- **Bar coded document tracking (optional)**
- **Event History**
- **Attachments (scanned, files, etc)**
- **Client notes**
- **Progress Reports Client/ Group**
- **Scheduling / Appointment Calendar**
    - **By Professional**
    - **Client, Group or**
    - **Resource**
- **Service Plans/ Goals**
- **Consulting Therapist**

CSM / MH   Client Services Manager Mental Health v2.0

Program Admissions
- Record Initial Client Data
- Print Bar Coded Consent Forms
- Track Applicants / forms receipt
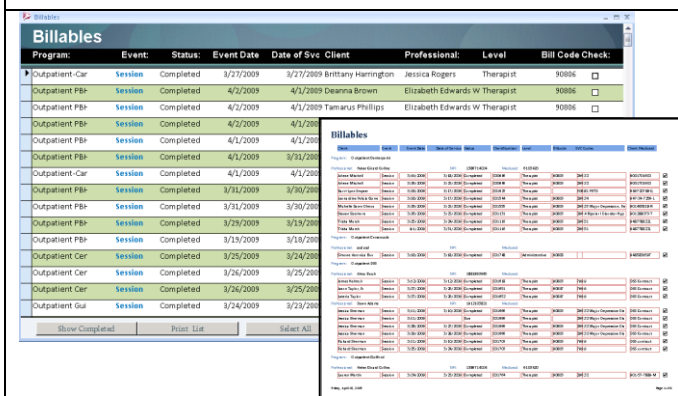- Verify applicant data
- Hand off to Diagnostics

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
- Professional , Client Audit
- Client, Group Progress Charts
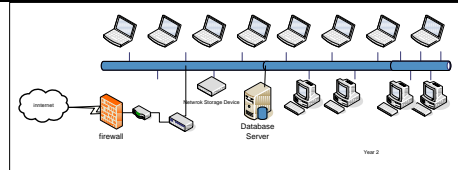- Community Demographics

Billing
- Open items to be Billed
- Create and manages billing batches
- Print Batch
- Recall batches
- 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: UA -- Optional
- Customers: Program, insurance, third party payee
- Vendors: 1009 Service Providers
- Employees
- Services and Products
- Pricing by agency/customer/ employee certification level
- Work Locations
- User level Security
- Full mid range accounting AR/AP/GL/PR

System:
- Multi user
- Database Driven (MS SQL)
- Centralized Database
- Remote Data Entry (optional)
- Windows XP/Vista User interface.