For the full user guide with screenshots please email the CareManager helpdesk at: caremanager@mobhc.org

Searching for a Client

In order to add a ERE episode and forms, you must ensure the client is in CareManager. **Many clients in CareManager have the same name. Please make sure you check the client's date of birth or other identifying information to ensure you are opening an ERE episode on the correct client**
Although, there are a few ways to search for a client, the most efficient way is to click **New Client**.
The First and Last Name fields are required. If the spelling is questionable, you can search with only typing in a few letters of the first and last name. If the client's name is more common, you may want to include the date of birth to narrow the results more. We do not recommend searching by social security number as it is possible that may not be available in CareManager. After entering the name, click the **Search** button or hit enter on your keyboard.

Adding a New Client

To add a new client, click **New Client**.
Before adding a new client, you must ensure the client is not already in the system. At a minimum, you must enter First and Last Name. If the client's name is more common, you may want to include the date of birth to narrow the results more. Enter the name in the appropriate boxes. After entering the name, click the Search button or hit enter on your keyboard. Be sure to use the correct formatting (First letter capitalized) as your entry will be auto populated in the fields when you add a client. After entering the name, click the Search button or hit enter on your keyboard.

If the client cannot be found in CareManager, you will see a message appear at the bottom of the search box: *No results found. Please click the Add New Client link above to enter a new client in the system*.
Click the **Add New Client** button. This will bring you to the demographics page.

At a minimum, you must enter the required fields (those with a red asterisk*).
The required fields to add a client are:
1. Personal a. Last Name
b. First Name
c. Gender
d. Date of Birth

2. Because are there are over 250,000 lives in CareManager the more identifying information you can enter the better to reduce the number of duplicates in the system and to help match clients within the DMH system (CIMOR). a. Specifically, if you have any of the information under i. Personal **1. Middle Name**
2. Social Security Number (SSN)
3. Medicaid ID/DCN
4. Identifiers – any other identifier such as Driver's License Number
5. Aliases

ii. Contact 1. Email address

2. Address, including county
3. Phone number

You are welcome to enter the demographic survey section information, but this is not required as you will need to enter this information into the ERE Referral section. Click **Save** when you have finished entering the available information.
3. Agency/Episode Details | After you click **Save** to add the new client. A *New Episode* box will appear/pop up. You will need to enter the following information: **a. Episode Type – always put ERE when adding a client**
b. **Agency Assignment** – your agency
c. **Assignment Date** – use referral date
d. Client Status – always put Outreach when adding a client

Leave the next two fields (Source and *County of Fiscal Responsibility*) blank. Click **Save**.
Be sure to select outreach and not enrolled when creating the client status.
Even if the client is already in the system (regardless of enrollment status), you must create an ERE episode before entering the ERE referral Form.

The Episode Detail is available and may be edited. Please note you should never update episode or enrollment information unless you made an error you need to correct.
Even if the client is already in the system (regardless of enrollment status), you must create an ERE episode before entering the ERE referral Form.
If you do not open an episode when you go to enter any ERE form for a client you will receive the following error message:

Adding a New ERE Referral Form

Once you have located or added your client, you can go directly to the ERE Referral Form page to enter details from the new ERE referral. This is located on the left side under additional forms. This is where all of the ERE forms can be accessed.
Once the referral form page is open, select **New ERE Referral. This is where you will select which ERE form you are completing.**
You will notice the Identifiers are auto populated from the demographics page. Enter the details of the ERE form. Although, the majority of the drop-down fields are required, each of those questions have an "unknown" option. However, the use of "unknown" should be very limited and updated as more information is obtained from the client.
Forms also have a draft/final status. When a form is in draft status it can still be edited. Forms should be put into final mode when completed.

After entering the information in the ERE form, save the entry. The **Save** button will keep you on this page, whereas the **Save & Close** button, will take you back to the referral form summary page.

Closing an ERE episode

You should follow ERE and agency policies for when to discharge clients from ERE. Once the episode is closed you will be unable to complete additional forms on that episode without submitting a ticket.

Once you have located the client that needs to have an episode closed, pull up the ERE forms. Once the forms are pulled up, located the episode closure form.

Enter today's date on the transition date and make sure to enter the reason why the episode is being closed. Once the form is finalized and saved, it will close out the episode, and this will remove the individual from your worklist.

Care Coordination(optional)

You are not required to assign clients in CareManager. This is information for IF your agency wants to assign clients to a staff caseload, the Care Coordination tab can be used.

Overview

The Care Coordination page is comprised of three sections:
• Team Assignment
• Social Support
• Professional Network

Team Assignment

Overview

The Team Assignment section of the Care Coordination page is comprised of the members of your agency who are assigned a specific role in the client's coordination of care.
Information on Team Assignment includes:
• Date Assigned
• Name and License
• Role
• Organization
• Actions

Creating a New Team Assignment

You must have the appropriate security permissions in order to use this feature. **If you are assigning a client and would like to be able to view the team members assignment, make sure to include yourself on the assignment.**
1. To assign a new Team Assignment to a Client click the **Assign Team** button on the top right-hand corner. The following screen will appear:

2. Select the **Add Team Member** from the lower left-hand corner to enter the team member.
3. Search for the desired team member in the search box.
4. The Primary Organization will auto-populate with the organization the team member is assigned to.
5. Select the team member's role(s) that apply to the team member from the Roles drop-down menu.
6. Enter the date the team member was assigned to the client in the Assign Date field.

Note: Team Assignments can be future dated.
7. Select **Save** to save the team assignment information.

Assignments may also be completed through the Team Management feature of the Assignment Menu. The Team Management feature allows clients to be assigned to multiple staff members at once. The feature also allows users to transfer a caseload of one staff member to another. There is a separate Team Management User Guide that provides further details on using that feature.

2. Select the **Add Team Member** from the lower left-hand corner to enter the team member.
3. Search for the desired team member in the search box.
4. The Primary Organization will auto-populate with the organization the team member is assigned to.
5. Select the team member's role(s) that apply to the team member from the Roles drop-down menu.
6. Enter the date the team member was assigned to the client in the Assign Date field.

Note: Team Assignments can be future dated.

7. Select **Save** to save the team assignment information.

Assignments may also be completed through the Team Management feature of the Assignment Menu. The Team Management feature allows clients to be assigned to multiple staff members at once. The feature also allows users to transfer a caseload of one staff member to another. There is a separate Team Management User Guide that provides further details on using that feature.

Individuals assigned through the care coordination tab will show up on the home page on the left-hand side when the 'Outreach' section is clicked.