

FINDING OR ADDING A CLIENT PROFILE



- If the client already has a profile in CMBHS, the client's name will appear at the bottom of the screen.
- Click on **Client Name** and then click on **Client Profile** to view **Client Information** and add or edit a client profile.

The screenshot displays the CMBHS (Clinical Management for Behavioral Health Services) web application interface. The browser window shows the URL <https://168.40.167.219/Cmbhs.Appl/webpages/FindClient.aspx>. The application header includes the CMBHS logo and navigation tabs for Provider Tools, Business Office, Data, Account Management, Help, and Logout. The date and build version are shown as 04/15/2014 - Build 302.

Client details are displayed at the top:

- Provider: APD Test Provider
- Location: APD - MH - Yes Waiver Loc
- Client Name: **LONGSTOCKING, PIPPY**
- Client Number: 368
- User Name: Morgan, Melvinia
- Local Case: 0009635896
- Episode Of Care:

The main content area is titled "Client Information" and includes several sections:

- Client Information:** Profile Date (04/15/2014), Profile Time (05:01 PM), First Name (PIPPY), Middle Name, Last Name (LONGSTOCKING), Suffix, Date of Birth (04/09/2000), Age (14), Age Type (Youth), City of Birth (Neverland, TX), Mother's Maiden Name (Sparrow), Does the client have a social security number? (Yes), and SSN (123-45-6789).
- Demographic Information:** Gender (Female), Race (White), and Ethnicity (Not Hispanic or Latino).
- Phone Numbers:** Home Phone (512-555-1212), Work Phone, and Cell Phone.
- Local Case Number:** Local Case Number (0009635896).
- Client Alternate Name:** A table with columns for Alternate Name Type and Alternate Name, showing "No records found".
- Name History:** A table showing 1 record(s) found with columns for Last Name, First Name, Middle Name, Suffix, and Date. The record shows Last Name: LONGSTOCKING, First Name: PIPPY, and Date: 04/15/2014.
- Audit Information:** Created Date (04/15/2014) and Last Saved Date (04/15/2014).

At the bottom of the page, there is a footer with the text: "©2013 Clinical Management for Behavioral Health Services (CMBHS), Texas Department of State Health Services. All rights reserved." The Windows taskbar at the bottom shows the system time as 5:40 PM on 4/15/2014.

- Click on **Find/Add Client**.
- If the client has not been entered into CMBHS, a **“No Records Found”** message will appear at the bottom left hand corner of the screen.
- Click on the **Add Client** button at the bottom right hand corner of the screen in order to create a new client profile.

The screenshot displays the CMBHS (Clinical Management for Behavioral Health Services) web application interface. The browser window shows the URL <https://168.40.167.219/Cmbhs.Apd/webpages/FindClient.aspx>. The application header includes the CMBHS logo and navigation links such as 'Provider Tools', 'Business Office', 'Data', 'Account Management', 'Help', and 'Logout'. The user is logged in as 'Morgan, Melvinia'.

The main content area is titled 'Find/New Client' and includes a search bar with a 'Search' button and a 'Clear' button. Below the search bar, there are several sections for search criteria:

- Scope Of Search:** A dropdown menu is set to '--- APD - MH - YES WAIVER LOCATION'.
- Direct Search Criteria:** Fields for CMBHS Client Number (678), SSN, NorthSTAR Identifier, Medicaid Identifier, and CARE Identifier.
- Primary Search Criteria:** Fields for First Name, Last Name, Date of Birth, Gender (Male/Female), Phone Type (Home), Phone number, Zip Code, and City of Birth.
- Location Based Search Criteria:** Fields for Local Case Number, Episode Of Care (Active/Inactive/All), By Recent Activity (None Selected), Primary Counselor (None Selected), and date ranges (From/To).
- Customize Display of Search Results:** Options for sorting (First, Second, Third) and order (Ascending/Descending).

At the bottom, there is an 'Existing Client List' table with the following columns: CMBHS Client Number, Last Name, First Name, Middle Name, Date of Birth, Phone Number, Gender, Age Type, City of Birth, Mother's Maiden Name, and SSN. The table currently displays 'No records found'. A blue arrow points to the 'Add New Client' button in the bottom right corner.

Navigation elements include a sidebar on the left with 'Home' and 'Find/Add Client' links, and a blue arrow pointing to the 'Find/Add Client' link. Another blue arrow points to the 'Add New Client' button.

- There are five tabs to enter information: **Client Information**, **Address**, **Contacts**, **Identifiers**, and **Additional Information**.
- **Note:** Information is entered into **Identifiers** and **Additional Information** as applicable.

The screenshot shows a web browser window displaying the CMBHS Client Profile application. The page title is "Client Profile - Windows Internet Explorer" and the URL is "http://168.40.167.219/Cmbhs.App/webpages/ClientProfile.aspx". The application header includes the CMBHS logo and navigation links for Provider Tools, Business Office, Data, Account Management, Help, and Logout. The user is logged in as Morgan, Melvinia.

The main content area is titled "Find/New Client" and contains a form with five tabs: Client Information, Address, Contacts, Identifiers, and Additional Information. A blue arrow points to the "Client Information" tab. The form fields are as follows:

Client Information		Demographic Information	
Profile Date	* 04/15/2014 mm/dd/yyyy	Gender	<input type="radio"/> Male <input checked="" type="radio"/> Female
Profile Time	* 05:01 hh:mm * <input type="radio"/> AM <input checked="" type="radio"/> PM	Race	Native Hawaiian or other Pacific Islander White * Multiracial - Unspecified
First Name	* Pippy	Ethnicity	* Not Hispanic or Latino
Middle Name		Phone Numbers	
Last Name	* Longstocking	Home Phone	512-555-1212
Suffix	None Selected	Work Phone	EXT
Date of Birth	* 04/09/2000 mm/dd/yyyy	Cell Phone	
Age	14	Local Case Number	
Age Type	Youth	Local Case Number	* 9635896
City of Birth	Neverland, TX		
Mother's Maiden Name	Sparrow		
Does the client have a social security number?	* <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown		
SSN	* 123-45-6786		

Below the main form, there are sections for "Client Alternate Name" (with a "New Alternate Name" button) and "Name History" (with a table for Last Name, First Name, Middle Name, Suffix, and Date). Both sections show "No records found".

At the bottom of the page, there is a footer with the text: "©2013 Clinical Management for Behavioral Health Services (CMBHS), Texas Department of State Health Services. All rights reserved." and a help line: "Help Line: 1-800-805-7800".

- On the **Address** tab, after the data has been entered, click **Add** which adds the record, then click **Save**.

The screenshot shows a web browser window displaying the CMBHS Client Profile application. The browser title is "Client Profile - Windows Internet Explorer" and the address bar shows "https://168.40.167.219/Cmbhs.Apd/webpages/ClientProfile.aspx". The application header includes the CMBHS logo, "Clinical Management for Behavioral Health Services", and the date "04/15/2014 - Build 302". The user is logged in as "Morgan, Melvin".

The main content area is titled "Find/New Client" and includes a "Find/Add Client" sidebar. The "Address" tab is selected, showing a form with the following fields:

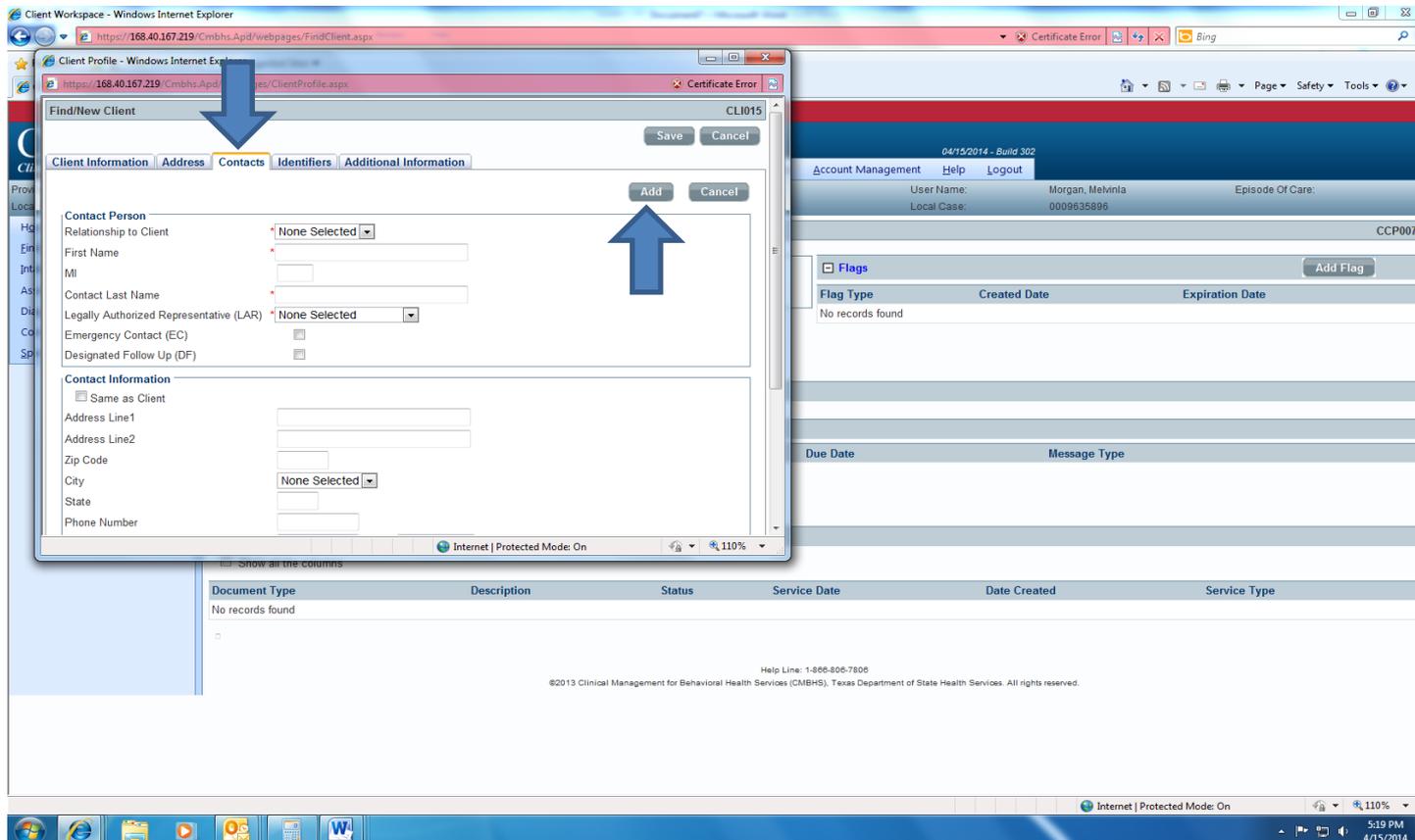
- Address Type: *Primary Residence (dropdown)
- Address Line1: *123 Shady Lane
- Address Line2: (empty)
- Zip Code: *78714
- City: *Austin (dropdown)
- County: *Travis (dropdown)
- State: *TX
- Years at Address: (empty)

Buttons for "Add" and "Cancel" are located to the right of the form fields. A "Save" button is located at the top right of the "Find/New Client" section. A "Client Address List" table is shown below the form, with columns for Address Type, Address Line 1, Address Line 2, City, State, Zip Code, and County. The table currently contains no records.

At the bottom of the page, there is a footer with the text: "Help Line: 1-866-906-7808 ©2013 Clinical Management for Behavioral Health Services (CMBHS), Texas Department of State Health Services. All rights reserved."

Blue arrows in the image point to the "Find/Add Client" sidebar, the "Address" tab, the "Add" button, and the "Save" button.

- Click on the **Contacts** tab, then click on the **Edit** button. This will open a new page to enter the contact information.
- After entering the contact information, click **Add**.
- **Note:** This is where the contact information for the legally authorized representative (LAR) is added to the client profile. Information for the LAR must be added so that the LAR's name will populate in the drop down boxes on other pages, i.e. Clinical Eligibility, Individual Plan of Care, and Termination.



Completed **Contacts** record.

The screenshot shows a web browser window titled "Client Profile - Windows Internet Explorer" with the URL "https://168.40.167.219/webbs/ajpd/webpages/ClientProfile.aspx". The page displays a "Find/New Client" form for client "CLI015". The "Contacts" tab is active, showing a form for a contact person named Rainey Longstocking-Day, who is a Parent Guardian. The contact information includes the address "123 Shady Lane", zip code "78714", city "Austin", and state "TX". The phone number is "512-555-7845". The "Audit Information" section shows the record was created and last saved on 04/15/2014. The "Client Contact List" table is empty, indicating no other records were found.

Client Profile - Windows Internet Explorer
https://168.40.167.219/webbs/ajpd/webpages/ClientProfile.aspx

Find/New Client CLI015
Save Cancel

Client Information | **Address** | **Contacts** | **Identifiers** | **Additional Information** Add Cancel

Contact Person

Relationship to Client: Parent
First Name: Rainey
MI:
Contact Last Name: Longstocking-Day
Legally Authorized Representative (LAR): Parent Guardian
Emergency Contact (EC):
Designated Follow Up (DF):

Contact Information

Same as Client

Address Line 1: 123 Shady Lane
Address Line 2:
Zip Code: 78714
City: Austin
State: TX
Phone Number: 512-555-7845
Work Phone:
EXT:
Email Address:

Client Contact List

Contact Type	First Name	Last Name	Phone Number	LAR	EC	DF
No records found						

Audit Information

Created Date: 04/15/2014
Last Saved Date: 04/15/2014

Internet | Protected Mode: On 110%
5:24 PM
4/15/2014

- Proceed to the **Identifiers** and **Additional Information** tabs, as applicable.

The screenshot displays a web browser window titled "Client Profile - Windows Internet Explorer" with the URL "https://168.40.167.219/Cmbhs.Apd/webpages/Client.aspx". The page is titled "Find/New Client" and includes a "Certificate Error" icon in the top right corner. The main content area has several tabs: "Client Information", "Address", "Contacts", "Identifiers", and "Additional Information". The "Identifiers" tab is currently selected, showing a form with the following fields:

- Identifier Type: A dropdown menu with "Old CMBHS Client Number" selected.
- Identifier: A text input field.
- Begin Date: A date input field with the format "mm/dd/yyyy".
- End Date: A date input field with the format "mm/dd/yyyy".

Buttons for "Add" and "Cancel" are located to the right of the form. Below the form is a table with the following structure:

Identifier Type	Identifier	Begin Date	End Date
No records found			

Below the table is an "Audit Information" section with the following data:

Created Date	04/15/2014
Last Saved Date	04/15/2014

At the bottom of the browser window, the taskbar shows the system tray with the text "Internet | Protected Mode: On", a volume icon, and the system clock displaying "5:25 PM 4/15/2014".

- After data has been added to all applicable tabs, click **Save**.
- The **'Successfully Saved'** message will appear.

