#### 1) Click Consumer Chart.

Maalonzaaona	Test One Contracted Service Provider
Consumers	Test One Contracted Service Provider
My Page	Consumer Chart Go to Consumer Chart, consisting of all documents related to a Consumer. This
Person Centered Plan	includes a page of links that makes it easier to move from one form to another within a consumer's chart.
Reports and Downloads	

#### 2) Search for Consumer.

Please type in consumer's last name and	Last Name	First Name	AKA or Other Information
first initial and press SEARCH to locate the			
consumer. You may wish to use a partial			
name if you are not sure about the spelling.	Case #	Medicaid ID	Birth Date (mmddyy)
If you cannot find the consumer by name,		CON	
you may type in any other available data to	Open Cases Only	SSN	SEARCH
locate the consumer.	- open eaced only		CERTON

## 3) Click either the CLS Documents link or Vocational Services link.

Chart Links	
Administrative/Finance	Clinical Services
Fee Discussion Forms Notices of Benefit Determination - Scanned DHHS Resolte Self-Determination/Choice Vouchers AFC Other Admin/Finance Information	Person Centered Plans Advanced Directives AFC Autism Behavior Plan Documents CLS Documents Chubhouse Evidence Based Practice Documents
Hospital Records/Crisis Documentation Hospital Correspondence Other Hospital/Crisis Information	School / IEPC Reports PERS Vocational Services

### 4) Click Add CLS Document or Add Vocational Services, depending on what link you clicked above.

Type/Date 🗘 County / Affiliate Notes Status Add Vocational Services	Type/Date 🗢	County / Affiliate	Notes	Details	$\stackrel{\Delta}{\bigtriangledown}$			Status	Add CLS Document
	Type/Date 🗦	County / Affiliate	;		Notes	Status	Add Vocational Services		

Entering is exactly the same for both. Anywhere the below examples say CLS Document, you can substitute Vocational Services if that is what you are working on.

5) Enter Date of the Document, Upload/Scan Document, enter any notes, and click Save and Continue to Send Copy to.

Index	1. CLS Document: Scan or Upload					
1. Scan or Upload 2. <u>Send Copy to</u> 3. <u>Signatures</u>	Date of CLS Document					
	Upload Document Scan Document					
	Notes					
	characters left: 8000					
	Save and Continue to Send Copy to Save CANCEL					

6) Send Copy to a staff member, if deemed clinically necessary. Click Save and Continue to Signatures.

Index	2. CLS Document: Send Copy to			
1. <u>Scan or Upload</u>				
2. Send Copy to	Instructions:			
3. <u>Signatures</u>	Once this document has been signed, it will be copied and sent to all parties listed below. For all documents that are to be sent outside of your agency, please be sure you have a valid Authorization for Release of Information before adding this copy request. - To notify staff of document completion, click on <b>Send to Staff</b> .			
	O Document Copies Send to			
	Send Copy To / Review By	!	Status	
	Record Added provider 07/18/2017 14:42:31		Record Changed provider 07/18/2017 14	1:42:31
	Save and Continue to Signatures	Save CAN	NCEL	

# 7) Click Save.

Index	3. CLS Document: Signatures			
1. <u>Scan or Upload</u> 2. <u>Send Copy to</u>	Document does not require signatures or a service activity log			
3. Signatures	Record Added provider 07/18/2017 14:46:03	Record Changed provider 07/18/2017 14:46:03		
	Save CANCEL			