

# MOC CMS Quick Reference Guide



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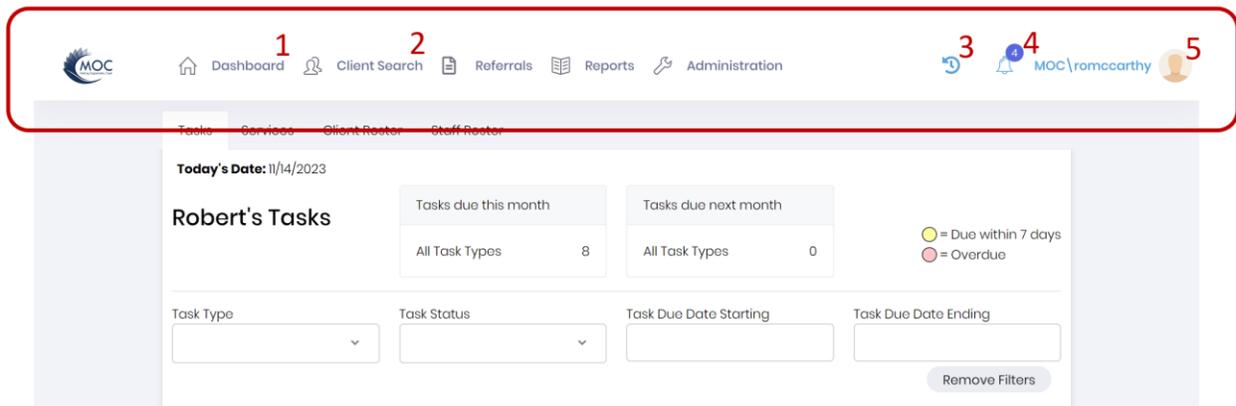
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## General System Navigation

### How do I log in to CMS?

To log in to CMS, go to <https://journey.smcpartners.com/Account/SessionLockScreen> in any browser and in the Tenant dropdown select MOC. Enter your username and password. You can also check the “Remember Me” box if you want the computer to remember your login information (recommended).

### What are the functions of the system navigation toolbar?

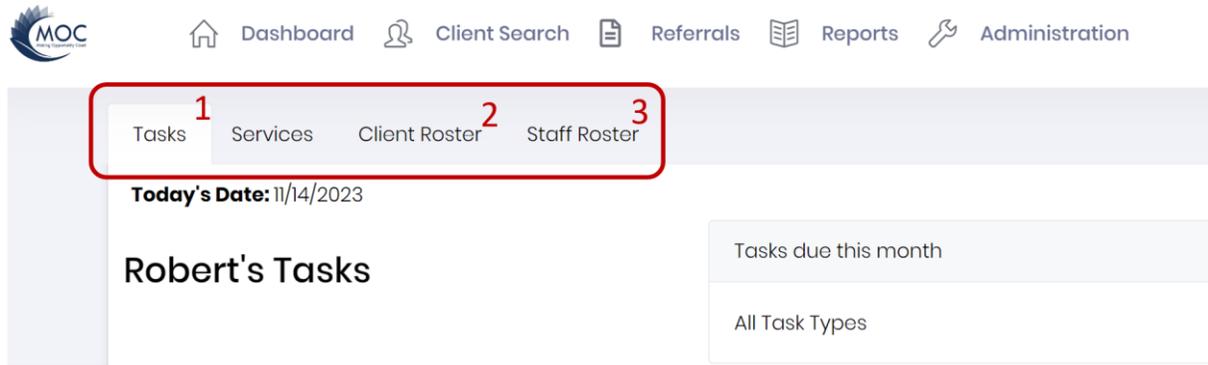


The system navigation toolbar has several functions, such as:

1. **Dashboard:** This button takes you to your dashboard, where you can view your tasks, client roster, and staff roster.
2. **Client Search:** This link allows you to search for clients using basic or advanced search options.
3. **Last 10 Clients:** This button shows you the list of the last 10 clients that you have accessed. You can click on the button to view or select a client from the list.
4. **Alerts:** This button shows you the number of alerts that you have received, such as new tasks, new clients, or system updates. You can click on the button to view or dismiss the alerts.
5. **Logout:** This button allows you to log out of the CMS and end your session.

## What is the dashboard on the home page in CMS?

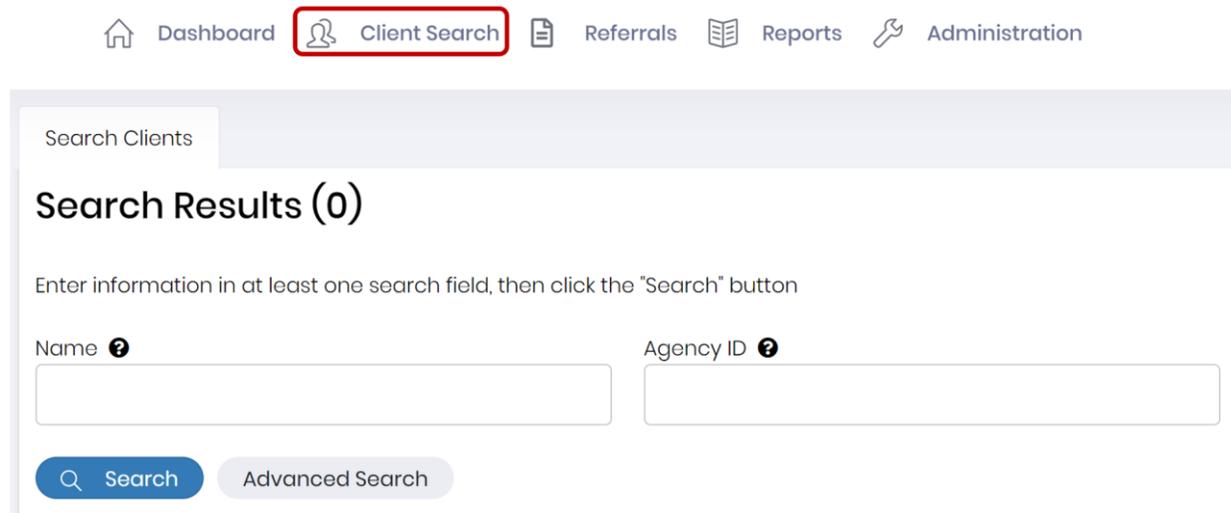
The dashboard is a feature of the CMS that shows you information about your tasks, client roster, staff roster, and client summary warnings. You can access the dashboard by clicking on the dashboard link on the system navigation toolbar. You can also filter, sort, and print the dashboard information. Here are some details about each section of the dashboard:



1. **Tasks:** This section shows the tasks assigned to you sorted by due date and priority. You can click on a task to view its details, complete it, or log an activity related to it. You can also create new tasks from this section.
2. **Client Roster:** This section shows the clients assigned to you or your team, sorted by name. You can click on a client to open their record, view their summary, or log an activity related to them. You can also add new clients from this section. This section shows the indicators of additional action needed for the clients assigned to you or your team, such as consent due date, pre-assessment next due date, evaluation next due date, etc.
3. **Staff Roster** (Only available to Program Supervisors): This section shows the staff members in your program, sorted by name. You can click on a staff member to view their profile, contact information, or role assignments. You can also edit or deactivate staff members from this section.

## Client Search

**How do I search for a client or add a new client?**

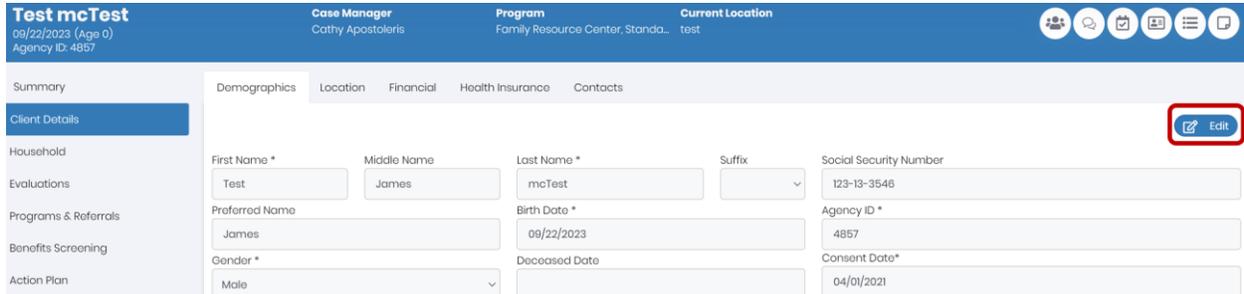


The screenshot shows a navigation bar with the following items: a home icon, "Dashboard", "Client Search" (highlighted with a red box), a document icon, "Referrals", a book icon, "Reports", a wrench icon, and "Administration". Below the navigation bar is a "Search Clients" header. The main content area displays "Search Results (0)" and a prompt: "Enter information in at least one search field, then click the 'Search' button". There are two input fields: "Name" with a question mark icon and "Agency ID" with a question mark icon. Below the input fields are two buttons: "Search" (with a magnifying glass icon) and "Advanced Search".

To search for a client, you can use the basic or advanced search options on the client search screen. You can enter keywords or filter by specific criteria to find existing clients. To add a new client, you can click the "+ New Client" button on the client search screen and enter the required information. The system will check for potential matches to avoid duplicate records.

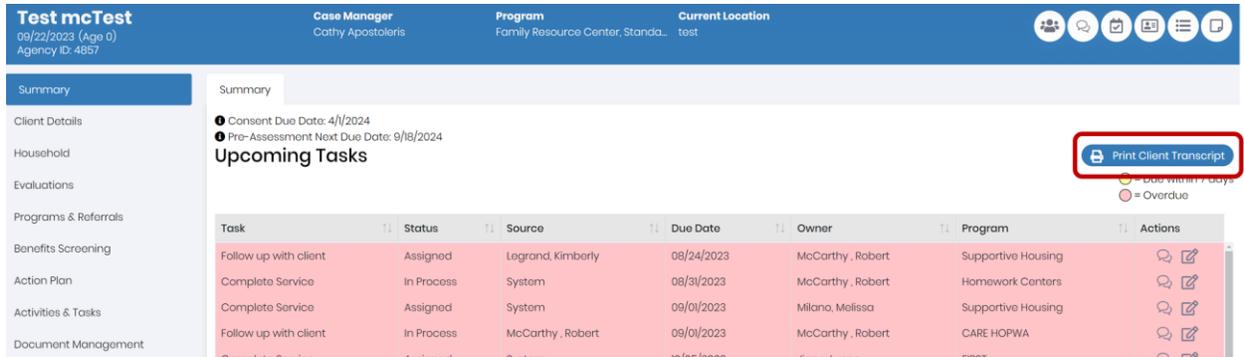
# Client Record

## How do I view and edit a client’s record?



To view a client’s record, you can click on the client’s name from the search results, the dashboard, or the last 10 clients. You will see the client record navigation on the left side of the screen, which contains links to the main sections of the record, such as summary, client details, location, financial, payers, contacts, evaluations, action plan, household, and document management. You can click on a section to view the information and click the edit button to make changes.

## How do I view and print the client transcript?

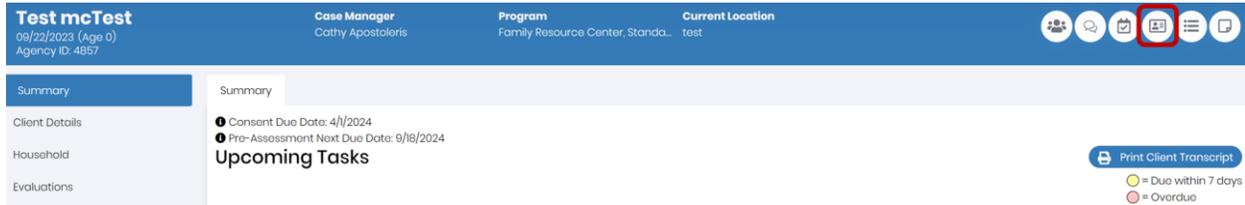


To view and print the client transcript, you can click on the “Print Client Transcript” button on the client’s summary page. This will open a PDF file that contains a summary of the client’s record, including their demographics, location, financial, payers, contacts, evaluations, action plan, programs and referrals, tasks, activities, and case notes. You can then print the PDF file using your browser’s print function. Once you have printed the client transcript remember to delete the .pdf file from your computer’s downloads folder and empty the recycle bin.

## How do I verify an address for a client's location?

To verify an address for a client's location, you need to enter the address information in the location screen and click on the "Verify Address" button. The system will search for existing addresses using the US Census Bureau database, and you will be required to select an address from the list in order to validate the location you entered manually. If the address is not found in the database, you can click on the "Override" button to proceed with the address you entered.

## How do I use the phonebook feature to access client or contact information?

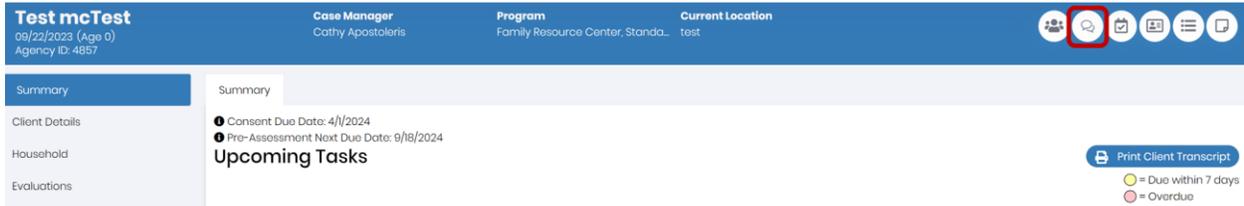


The screenshot displays a client record interface for 'Test mcTest'. The header bar includes the client name, date of birth (09/22/2023), age (0), and agency ID (4857). It also shows the Case Manager (Cathy Apostoleris), Program (Family Resource Center, Standa...), and Current Location (test). A row of icons is visible in the top right, with the 'Phonebook' icon (a telephone handset) highlighted with a red box. Below the header, a sidebar on the left lists navigation options: Summary, Client Details, Household, and Evaluations. The main content area shows a 'Summary' tab with upcoming tasks: 'Consent Due Date: 4/1/2024' and 'Pre-Assessment Next Due Date: 9/18/2024'. A 'Print Client Transcript' button is located on the right side of the main content area. A legend at the bottom right indicates that a yellow circle represents 'Due within 7 days' and a red circle represents 'Overdue'.

To use the phonebook feature, you can click on the "Phonebook" button in the client record header. This will open a screen that contains the client's name and ID and contact information. You can also view the contact information of the client's supporters and other contacts by clicking on the "Contacts" tab. You can filter the contacts by name and role using the dropdown menus.

## How do I write a Case Note for a Client?

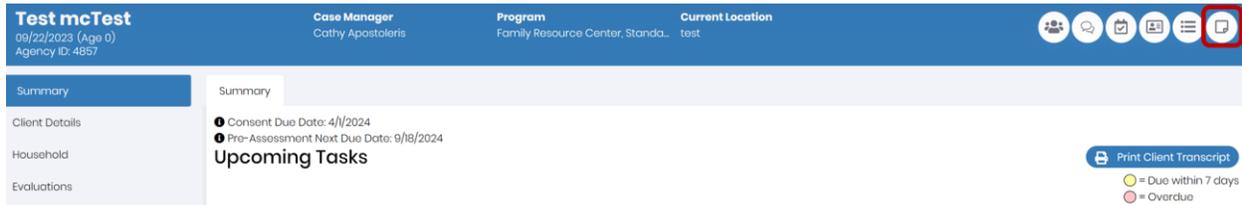
To write a case note for a client by logging an activity, follow these steps:



1. Go to the Client Record Navigation and click on the Log Activity button. You can also click on the Log Activity button from the Dashboard or the Tasks section.
2. Select the activity type, date, time, duration, and tasks or services related to the interaction. You can also add additional clients or services if needed.
3. Write the case note in the Case Note section at the bottom of the Log Activity screen. You can use the formatting tools to add bullets, numbering, bold, italic, or underline. You can also use the tagging feature to categorize the case note by topic, such as assessment, referral, intervention, etc.
4. Mark the case note as private or alert if needed. A private case note can only be viewed by the user who created it and the Primary Care Manager. An alert case note will notify the Primary Care Manager of the case note and require their attention.
5. Click on the Save button to save the case note. The case note will be stored in the Client Notebook and can be viewed, filtered, printed, or deleted.

*\*For more information on logging an activity please refer to page [15](#).*

You can also add a Case Note from the client notebook. To do so follow these steps:



1. Go to the Client Notebook from the Client Record Navigation or the System Navigation Toolbar.
2. Click on the Add Case Note button at the top of the screen.
3. Select the case note type, date, time, duration, and tasks or services related to the case note. You can also add additional clients or services if needed.
4. Write the case note in the Case Note section. You can use the formatting tools to add bullets, numbering, bold, italic, or underline. You can also use the tagging feature to categorize the case note by topic, such as assessment, referral, intervention, etc.
5. Mark the case note as private or alert if needed. A private case note can only be viewed by the user who created it and the Primary Care Manager. An alert case note will notify the Primary Care Manager of the case note and require their attention.
6. Click on the Save button to save the case note.

# Household

## What is the Household section of the Client Record?

The screenshot displays the 'Test mcTest' client record interface. The top navigation bar includes the client name, date of birth (09/22/2023), age (0), agency ID (4857), case manager (Cathy Apostoleris), program (Family Resource Center, Stand...), and current location (test). The left sidebar lists various navigation options, with 'Household' highlighted in a red box. The main content area shows the 'Household Summary' section, which includes a table with one member: 'Test mcTest' (Head of Household) with an annual income of '\$10,400,000' and assets 'Not reported'. Below this is the 'Household Characteristics' section, which includes a text prompt: 'To modify this Household Address, go to the Head of Household's location screen'. The characteristics table includes fields for 'Address' (Other test 01782), 'Family Type', and 'AMI%'. An 'Add Member' button is visible in the top right corner of the Household Summary section.

The household section in Client Record Navigation allows you to view and edit the household information of a client, such as household members, relationships, and living arrangements. You can also add or remove household members, change the head of household, or update the household income. The household section is important for determining the eligibility and affordability of programs for the client and their family.

## How do I add or remove members of a Household?

This screenshot is identical to the one above, showing the 'Test mcTest' client record. In this view, the 'Add Member' button in the top right corner of the 'Household Summary' section is highlighted with a red box. The rest of the interface, including the navigation sidebar and the household data table, remains the same.

To add or remove a member from a client's household, go to the Household section of their record and click on one of the buttons on the top right corner of the screen. To add a member, click on Add Member and search for or create a new client record. Then, select their relationship to the head of household and confirm the changes. To remove a member, click on Remove Member and select the member(s) that you want to remove by checking the box next to their name. Then, confirm the changes. You can also reassign the head of household or edit their relationship by clicking on Reassign HoH.

# Programs & Referrals

## How do I create an internal referral in CMS?

The screenshot shows the CMS interface for a client named 'Test mcTest'. The top navigation bar includes the client's name, case manager (Cathy Apostoleris), program (Family Resource Center), and current location (test). The sidebar on the left lists various sections, with 'Programs & Referrals' highlighted in red. The main content area displays a table of current programs and a 'Referral History' table. Two buttons, 'Add New Program' and 'Add New Program Referral', are highlighted with red boxes.

Primary	Program	Variant	Program Status	Primary Case Manager	Program Start Date	End Date	Actions
<input checked="" type="radio"/>	Family Resource Center	Standard	Enrolled	Apostoleris, Cathy	09/22/2023		
<input type="radio"/>	Behavioral Health	Standard	Enrolled	Jiang, Lynne	10/20/2023		
<input type="radio"/>	ASE/Peer Educators	Standard	Enrolled	McCarthy, Robert	09/26/2023		
<input type="radio"/>	Child Care	Standard	Enrolled	SMC, Admin	09/07/2023		
<input type="radio"/>	Head Start	Standard	Enrolled	Carmona- Rosado, Adlin	08/25/2023		
<input type="radio"/>	Secure Jobs	Standard	Enrolled	McCarthy, Robert	08/18/2023		
<input type="radio"/>	Financial Empowerment Center	Standard	Enrolled	McCarthy, Robert	07/20/2023		
<input type="radio"/>	Supportive Housing	Standard	Enrolled	McCarthy, Robert	07/13/2023		

**Referral History**

Referred Program	Referred Program Variant	Date Referred	Referral Owner	Referral Status	Status Date	Actions
Behavioral Health	Standard	10/24/2023	Robert McCarthy	Closed - Completed	10/24/2023	
Behavioral Health	Standard	10/20/2023	Lynne Jiang	Enrolled	10/20/2023	
FIRST	Standard	10/20/2023	Flore Luxama	Closed - Completed	10/20/2023	
Family Resource Center	Standard	10/18/2023	Cathy Apostoleris	Pending		
WIC	Standard	10/17/2023	Claritza Soto	Closed - Completed	10/17/2023	
Behavioral Health	Standard	09/26/2023	Robert McCarthy	Closed - Completed	09/26/2023	
FIRST	Standard	09/22/2023	Alvina Duffy	Pending		
Child Care/Head Start Referral	Standard	08/25/2023	Adlin Carmona- Rosado	Closed - Completed	08/25/2023	

To create an internal referral in CMS, you need to go to the Programs and Referrals section of the client’s record and click on the “Add Referral” button. This will open a screen where you can select the program that you want to refer the client to, and enter the referral date, reason, and notes. You can also select the staff member who will be responsible for following up on the referral in the Referral Admin dropdown. The Referral Admin will be defaulted to the person designated to receive referrals from the selected program, however, can be changed if needed using the dropdown. When you are done, click on Save Referral to save and create it. The referral will appear in the Programs and Referrals section, and you can view or edit it by clicking on the “View/Edit” icon next to it.

For more detailed information on how to send an Internal Referral and Referral best practices please refer to the [Referrals in CMS](#) PowerPoint or [Elements of an Effective Referral](#) PDF saved in the [CMS SharePoint Drive](#).

## How do I create an external referral in CMS?

The screenshot shows the 'Service Selection' form in the CMS. The 'Action Plan' tab is highlighted in the left sidebar. The 'Service Owner' is 'McCarthy, Robert'. The 'Service' dropdown is set to 'External Referral', and the 'Program' dropdown is set to 'Nothing selected'. The 'Service Variant' dropdown is also set to 'Nothing selected'. There are 'Save', 'Cancel', and 'Restart' buttons at the top right of the form.

To create an external referral in CMS, you need to go to the Action Plan section of the client's record and click on the "Add Service" button. This will open a screen where you can select the service "External Referral". Select the variant for the service. Select your Program from the Program dropdown. Select the date of the service, any potential focus areas, and enter any comments you have. When you are done, click on Save to save and create it. Please note that creating an External Referral in CMS does not trigger a Referral to be sent to the external partner, it is only to be used for internal reference. To actually create an External Referral, MOC staff must reach out directly to the external organization.

## How do I view the status of a referral?

The screenshot shows the 'Referral Maintenance' section with a 'Referral History' table. The 'Referral Status' column is highlighted with a red box. The table lists various referrals with their status, date, and owner.

Referred Program	Referred Program Variant	Date Referred	Referral Owner	Referral Status	Status Date	Actions
Behavioral Health	Standard	10/24/2023	Robert McCarthy	Closed - Completed	10/24/2023	
Behavioral Health	Standard	10/20/2023	Lynne Jiang	Enrolled	10/20/2023	
FIRST	Standard	10/20/2023	Flore Luxama	Closed - Completed	10/20/2023	
Family Resource Center	Standard	10/18/2023	Cathy Apostoleris	Pending		
WIC	Standard	10/17/2023	Claritza Soto	Closed - Completed	10/17/2023	
Behavioral Health	Standard	09/26/2023	Robert McCarthy	Closed - Completed	09/26/2023	
FIRST	Standard	09/22/2023	Alvina Duffy	Pending		
Child Care/Head Start Referral	Standard	08/25/2023	Adlin Carmona- Rosado	Closed - Completed	08/25/2023	

[+ Add New Program Referral](#)

To view the status of a referral, you can go to the Programs and Referrals section of the client's record and scroll down to the Referral Maintenance section. The Referral History table will show you a history of all the Referrals for the client. In the "Referral Status" Column you will be able to see the current status of each Referral.

## How do I change the status of a referral?

Referral Maintenance

Referral History

Referred Program	Referred Program Variant	Date Referred	Referral Owner	Referral Status	Status Date	Actions
Behavioral Health	Standard	10/24/2023	Robert McCarthy	Closed - Completed	10/24/2023	 
Behavioral Health	Standard	10/20/2023	Lynne Jiang	Enrolled	10/20/2023	
FIRST	Standard	10/20/2023	Flore Luxama	Closed - Completed	10/20/2023	 
Family Resource Center	Standard	10/18/2023	Cathy Apostoleris	Pending		
WIC	Standard	10/17/2023	Claritza Soto	Closed - Completed	10/17/2023	 
Behavioral Health	Standard	09/26/2023	Robert McCarthy	Closed - Completed	09/26/2023	 
FIRST	Standard	09/22/2023	Alvina Duffy	Pending		
Child Care/Head Start Referral	Standard	08/25/2023	Adlin Carmona- Rosado	Closed - Completed	08/25/2023	 

[+ Add New Program Referral](#)

To change the status of a Referral, you can go to the Programs and Referrals section of the client's record and click on the "Manage" icon next to the Referral. This will open a screen where you can see and edit the details of the Referral. To change the status of the Referral, you can click on the "Change Status" button and select the new status from the dropdown menu. You can also enter any notes or comments related to the status change. When you are done, click on Save Status to save and update it.

# Services

## How do I add a service in a client's action plan?

The screenshot shows the 'Action Plan' section of a client record. On the left is a navigation menu with 'Action Plan' selected. The main area is titled 'Action Plan' and contains a 'Filter Action Plan' section with dropdowns for 'Timeframe' (Current), 'Program' (All), and 'Focus Area' (Nothing selected). Below the filters is a table of services. In the top right corner, there are three buttons: 'Print VPR Form', 'Print', and 'Add Service', with the 'Add Service' button highlighted by a red box.

Service	Program	Service Owner	Service Status	Service Start Date	Service Completion Date	Outcome(s) Status	Action
FIRST	FIRST	McCarthy, Robert	Achieved	11/03/2023	11/07/2023	None	
FIRST	FIRST	McCarthy, Robert	Achieved	11/03/2023	11/06/2023	None	

To add a service in a client's action plan, you need to go to the action plan section of their record. This will open a screen where you can view, add, edit, or delete services for the client. To add a new service, click on the "Add Service" button and select the service type, provider, target start date, target end date, frequency, and outcome. When you are done, click on Save Service to save and create it.

## How do I edit a service in a client's action plan?

The screenshot shows the 'Action Plan' section of a client record. The left navigation menu has 'Action Plan' selected. The main area displays a table of services. In the 'Action' column of the first row, the 'edit' icon is highlighted with a red box.

Service	Program	Service Owner	Service Status	Service Start Date	Service Completion Date	Outcome(s) Status	Action
FIRST	FIRST	McCarthy, Robert	Achieved	11/03/2023	11/07/2023	None	
FIRST	FIRST	McCarthy, Robert	Achieved	11/03/2023	11/06/2023	None	

To edit a service in a client's action plan, you need to go to the action plan section of their record and click on the "Service Maintenance" button. This will open a screen where you can view, add, edit, or delete services for the client. To edit an existing service, click on the "Edit" icon next to the service and make the desired changes. You can change the service type, provider, target start date, target end date, frequency, and outcome. When you are done, click on Save Service to save and update it.

# Evaluations

## How do I complete an evaluation for a client?

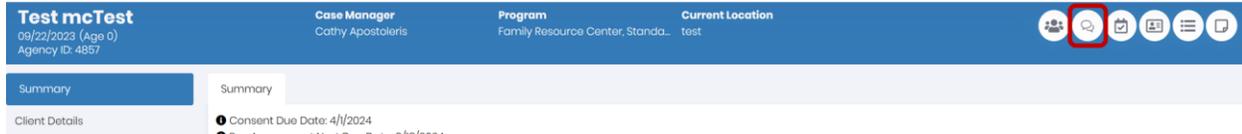
The screenshot shows the 'Test mcTest' interface. The header includes 'Case Manager: Cathy Apostoleris', 'Program: Family Resource Center, Standa...', and 'Current Location: test'. The sidebar on the left has 'Evaluations' highlighted in red. The main content area is titled 'Evaluation Selection' and shows a table of evaluation domains and subdomains.

Evaluation Selection						
⚠ = At-Risk						
<input checked="" type="checkbox"/>	Pre-Assessment (0/1 selected)					1 ⚠
<input type="checkbox"/>	Subdomain	Score	Submitted By	Last Evaluation	Last Evaluation By	
	Pre-Assessment	In-Crisis	McCarthy, Robert	09/18/2023	McCarthy, Robert	
<input checked="" type="checkbox"/>	Housing (0/1 selected)					
<input type="checkbox"/>	Subdomain	Score	Submitted By	Last Evaluation	Last Evaluation By	
	Housing	Safe	McCarthy, Robert	09/18/2023	McCarthy, Robert	
<input checked="" type="checkbox"/>	Financial Stability (0/1 selected)					
<input type="checkbox"/>	Subdomain	Score	Submitted By	Last Evaluation	Last Evaluation By	
	Financial Stability					
<input checked="" type="checkbox"/>	Family Engagement (0/1 selected)					
<input type="checkbox"/>	Subdomain	Score	Submitted By	Last Evaluation	Last Evaluation By	
	Family Engagement					
<input checked="" type="checkbox"/>	Transportation (0/1 selected)					
<input type="checkbox"/>	Subdomain	Score	Submitted By	Last Evaluation	Last Evaluation By	
	Transportation					

To complete an evaluation for a client, go to the Evaluations section of their record and select the domain and subdomain that you want to evaluate. Then, click the Evaluate button to open the evaluation screen. You can answer the questions and enter case notes for each subdomain. You can also save your progress and resume later by clicking the Save In Process button. When you are done with all subdomains in a domain, click the Submit button to submit the evaluation. You can view the evaluation score and history in the Evaluations section.

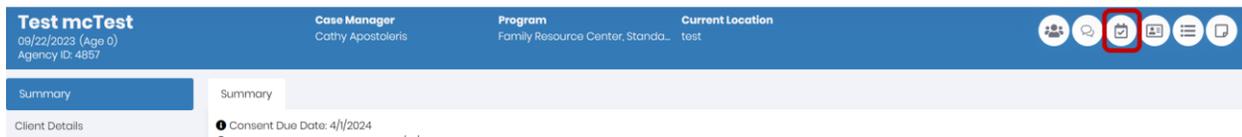
## Tasks & Activities

### How do I log an activity?



To log an activity or complete a task for a client click on Log Activity from the Client Record Header. Then, select the type of activity that you want to log, such as phone call, home visit, email, etc. You can also select one or more tasks that are related to the activity from the Task List. Then, enter the details of the activity, such as date, time, duration, participants, etc. You can also enter case notes for each activity. When you are done, click on Submit Activity to save and complete it. If you selected any tasks related to the activity, they will be marked as completed as well.

### How do I create a Task?



To create a task for a client that is separate from an activity, you can use the Tasks section of their record. Click on Schedule a Task from the Client Record Header to create a new task. You can enter the details of the task, such as title, description, due date, priority, status, etc. You can also assign the task to yourself or another staff member. When you are done, click on Save Task to save and create it. You can view and edit your tasks in the Tasks section or in your dashboard.

### What is the difference between a task and an activity in CMS?

A task and an activity are two different types of records in the CMS that help you track your work with clients. A task is a specific action that you need to do for a client, such as calling them, sending them a letter, or scheduling an appointment. An activity is a record of what you have done for a client, such as a phone call, a home visit, or an email. You can log an activity and complete a task at the same time, or you can create a task and complete it later. Tasks and activities are linked to the client's record and can be viewed in the Tasks and Activities sections, respectively.

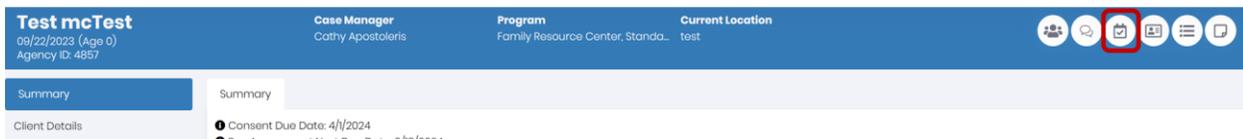
## What is the difference between a User Created Task and a System Generated Task?

A system generated task is a task that the CMS creates automatically based on service target completion dates or other triggers. These tasks can be completed by logging an activity or completing the service in the Action Plan.

A user generated task is a task that a user creates manually for themselves or for another user. These tasks can be completed by logging an activity or marking the task as completed.

## How do I create a User generated task?

A user generated task is a task that you create manually for yourself or for another user. You can use this feature to set reminders, follow-ups, or other actions related to a client or a service. To create a new user generated task, follow these steps:



1. Go to the Client Record Navigation and click on the Schedule a Task button.
2. Select the task type from the drop-down list, such as Phone Call, Email, Meeting, etc.
3. Enter the task Program, due date, and any comments.
4. Select the task owner from the Assign to drop-down list. You can assign the task to yourself or to another user in your organization.
5. Click on the Save button to create the task.

## How do I complete a User generated Task?

To complete a user generated task, follow these steps:

1. Go to the Dashboard and click on the Tasks tab. You will see a list of tasks assigned to you or your team, sorted by due date and priority.
2. Click on "View/Edit" in the Actions column to view its details, such as client name, service name, due date, status, and description.
3. To complete a task, you must log an Activity. Click on the Log Activity button in the Client Record and enter the required information, such as activity type, date, time, duration, and case notes.
4. Click "Add Task" to associate the Activity with the Task you would like to complete and select the Task from the dropdown menu.
5. Change the status of the Task to "Completed".
6. You can also associate the activity with one or more tasks by clicking "Add Task" and selecting the additional tasks in the dropdown menu.
7. To mark a task as completed, click "Submit". The task will be removed from the list.

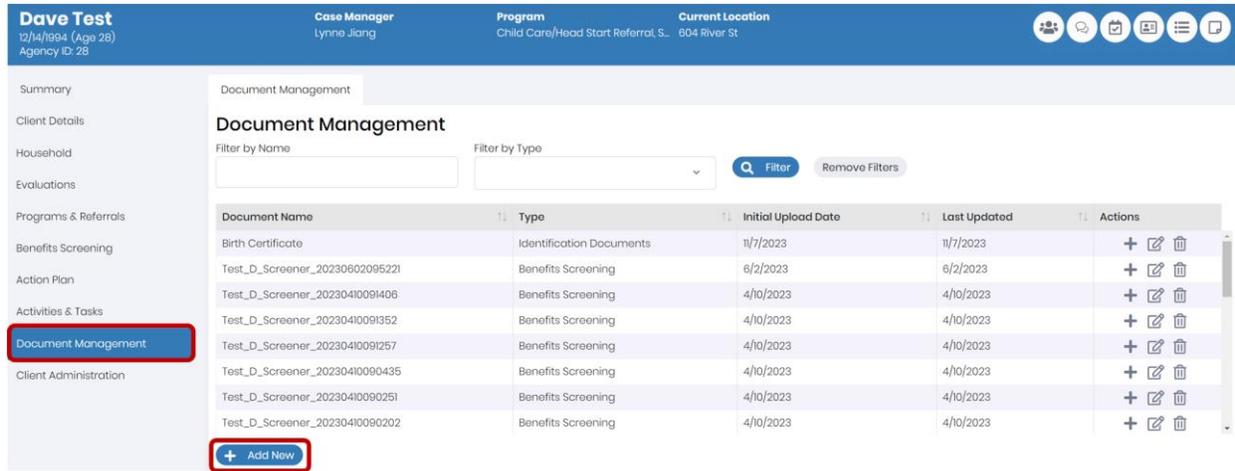
### **How do I complete a system generated task?**

System-generated tasks are tasks that CMS creates for service owners based on service target completion dates. These tasks can be completed by logging an activity or completing the service in the Action Plan. To manage system-generated tasks, you can follow these steps:

1. Go to the Dashboard and click on the Tasks tab. You will see a list of tasks assigned to you or your team, sorted by due date and priority.
2. Click on "View/Edit" task to view its details, such as client name, service name, due date, status, and description.
3. To complete a task, go to the Client's Action Plan and find the Service associated with the Task you are trying to complete.
4. Click "Edit" in the Actions column for the Service.
5. To close the service and mark a task as completed, enter an "Actual Service Completion Date" for the Service. The task will be removed from the list and the service will be updated in the Action Plan.
6. A popup will appear to inform you that you are closing a Service. You can select "Yes".

# Document Management

## How do I add a document to the Client's record?



To use the document management section, you can:

1. Click on the “+Add New” button to browse your computer’s files and select a file to upload. You need to enter the document name, type, and date.
2. Click on the Edit icon or the Trash icon to edit or delete a document record. You can also delete a single version of a document from the Document Detail section.
3. Click on a row of the Documents table to view the details and the version history of a document. You can download a document by clicking on the Download icon.
4. Click on the Filter button to filter the Documents table by name or type. You can also sort the table by clicking on a column.