# Black creek

## Client File Management System



### **Benefits:**

- Helping teams work together
- Improved tracking and control
- Paper free client files
- Reduced operational costs
- Improved compliance
- Disconnected client file access
- Automated disposition rules
- Powerful search capabilities
- Client file access auditing
- Organization policy management
- Counsellor team knowledgebase
- Protected and secure client files
- Hosted or In House Solutions



206 Ontario Street Stratford, Ontario N5A 3H4 Phone: 519-275-3095 Toll Free: 888-212-5060 Fax: 519-275-3087



www.blackcreektechnologies.com

#### mprove Efficiency and Protect Client Confidentiality

Allowing the counsellor access to client files wherever the client is located, is a must. The challenge is to properly manage and protect the client information and the confidentiality of the client file.

A paper based client file approach requires the paper to travel with the counsellor, making it inaccessible to the rest of the staff. The risk of possible client file loss is high and exposes the organization to unnecessary legal compliance violations.

An automated system, that places the client file on the counsellor's secured computer and automatically synchronizes with a centralized, secured environment significantly reduces client file exposure to loss and protects client confidentiality.

#### Backcreek CFMS – A Complete Client File Management System

The Client File Management System (CFMS) is a SharePoint® based solution that allows the electronic client file to travel with the counsellor, while allowing other staff to access and update the client file as required. The client file is easily protected, controlled and audited throughout it's life.

Built within SharePoint, Blackcreek CFMS is easy for Microsoft Office® users to learn and provides access to industry-leading collaboration tools for increased productivity. Get up and running quickly with a tried and true client file management solution.

## Black:creek

206 Ontario Street Stratford, Ontario N5A 3H4 Phone: 519-275-3095 Toll Free: 888-212-5060 Fax: 519-275-3087



www.blackcreektechnologies.com

#### **Key Features**

- Access Anywhere to allow the counsellor to add and edit the client file on the road, with or without an internet connection, while allowing other staff to access and update the same client file. Once reconnected to the CFMS server, counsellor changes are automatically synchronized.
- Advanced Searching to easily locate client file content by searching the text of both images and document text.
- Reference Material Management to handle reusable electronic reference documentation, such as journal articles and study reports supporting the counsellor with the right materials for the circumstance.
- Paper Free to improve efficiency, reduce file loss and conserve valuable office space by removing the need for file cabinets, further reducing operating costs.
- Automated Auditing to track who edited, accessed and viewed which client file, protecting a client's confidentiality and privacy.
- Adjustable Views to allow users to easily adjust the sorting, select columns and apply task specific filters to views.
- Content Lock Down to automatically prevent editing of case notes and documents after a specific period of time.
- Automatic Disposition and Retention to ensure that the right client files are discarded or retained, conserving storage space and ensuring industry compliance rules.
- Automated Filing to allow users to easily add electronic image and document content into the repository.
- Easily Customizable to support your organizations unique needs.

🕽 🕞 🗢 🔯 http://someserver/home.aspx									💌 🔿 🗶 🔽 Bing					2
Favorites 🛛 📦 Home - Cla	ement Sy	stem		👌 + 🖸 - 🗆 🌐 + Page +							ty = 1	fools = 🔬 -		
Actions • 😒 Brows	e Pe	ge										Syste		ount • 📭
Client File M	lanage	me	nt Sys	tem									🥑 Like R	Tags & Notes
lient File Management System Time Tracking										Search this site			٩	
tain	Clients										Counsellors			
te Pages e Library		Full	Name		Client ID	Last Act	ivity	Status	Counsellor		Full Name	Created		Created B
unsellars		Boop, Betty		4591H	0/30/2011 1:00 PM		Active	Cochran, Dennis		* - Main , Area	8/3/2012 12:38	PM	System A	
ients	Davis, Bob				6573H	8/3/201	2 12:38 PM	Active	Perkins, Cindy	*.	8/3/2012 12:38 F		System Ar	
sks		Elvis	sson, Elv	ris	1111H	1/21/20	30 12:38 PM	Active	Cochran, Dennis		Intakes , Area	OV OVED ALL OUT		37948111 M
takes			erstod, t		9999H		2 12:38 PM	Active	Cochran, Dennis		Cothran.	8/3/2012 12:38 F	284	System A
le Library		Nevel, David			2222H		2 12:38 PM	Active	Cochran, Dennis	Dennis		0/3/2012 12:30 /		oystem M
		Smith, Jenna			8788H		2 12:38 PM	Active	Cochran, Dennis			0/3/2012 12:38 F	210	System Ac
ochran, Dennis le Library		Tell, William Williamson, Bill			8989H		2 12:38 PM	Inactive	Perkins, Cindy		Northern,	8/3/2012 12:38 F	PM	System Ac
					1324H	3/3/2012 12:38 PM		Active	Weaver, Eileen		James			
dia	Add new item										Perkins, Cindy	8/3/2012 12:38 F	PM	System Ac
adley, Wesley e Library	Task	s									Ruggles, Patricia	8/3/2012 12:38 F	PM	System Ac
orthern, James		ø	Туре	Title	Status	Priority	Due Date	% Complet	te Predecessors		Turner, Glen	8/3/2012 12:38 F	PM	System Ar
e Library				Please close client in	Completed	(2) Normal	9/19/2012	10	0 %		Weaver, Eileen	8/3/2012 12:38 F	M	System A
rkins, Cindy Library		Catalyst. This client has been								•	idd new item			

### lackcreek Implementation and Support Services

Blackcreek Technologies offers a complete set of implementation services. We can leverage our

software solutions, best practice configurations, domain experience and technical expertise to help with any aspect of your project, including

- Project Management
- Requirements Analysis and System Design
- System Installation and Configuration
- Testing
- Data Conversion and Migration
- User Training and Ongoing Support

#### About Blackcreek Tec<mark>hnologies</mark>

Blackcreek Technologies is a dynamic company dedicated to providing integrated business technology solutions and improvements to our valued customers.

We believe in our abilities. We believe in integrity at all levels of our business. We provide exceptional service. We anticipate and meet our customers' various requirements. We are a diverse group of dedicated professionals who specialize in providing complete and pro-active solutions for businesses.