CRIS

Client Record Information System

CRIS.Solutions

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Client Record Information System

The CRIS app runs on Android tablets and mobile phones providing a comprehensive yet simple-to-use client record. Organisations can store information safely whilst users can see and update their clients' records anywhere they work. Changes to client records are shared automatically whenever the users' devices are in wireless (or mobile) range so that everyone is kept up-to-date. Access to client information is role-based, controlling what each user can see and change. Two-factor authentication and industry standard data encryption ensures safe transmission and storage of sensitive information.

Synchronisation

Information in the local database is synchronised automatically, every 30 minutes, whenever there is a mobile/wireless connection. A manual sync. option may be used to ensure important changes are sent immediately.

Lock

Touching the lock icon password locks the app, hiding client information.

Unread Documents

New documents, added by other users, appear automatically on the main screen for clients being 'followed'. Documents may be read (and removed from the list) with a single touch. Users automatically follow their own clients but can choose to follow (or un-follow) any client that they have access to.

My Clients

The list of clients in users' groups and/or invited to their ad-hoc sessions

All Clients

A list of clients visible to the user via role-based access control.

My Sessions

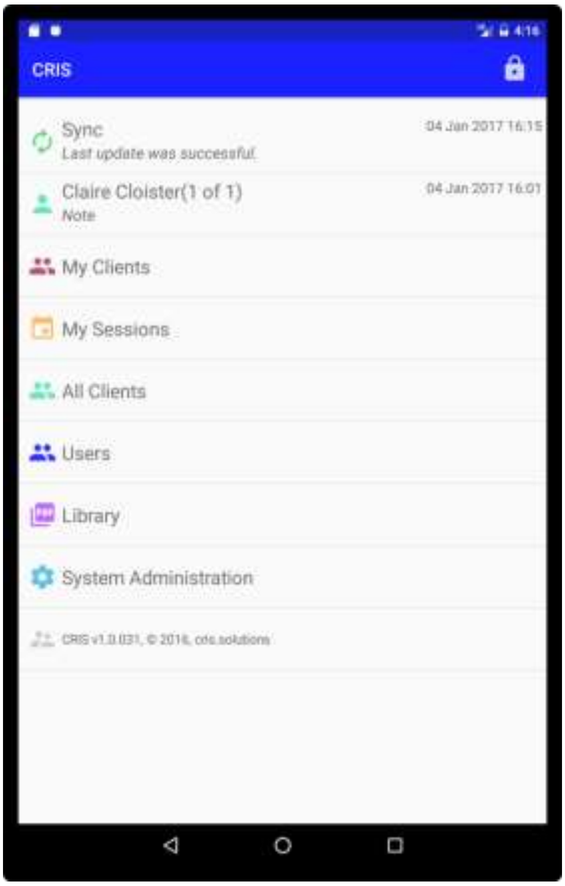
A list of sessions that involve the users' clients.

Users

A list of users with their contact details.

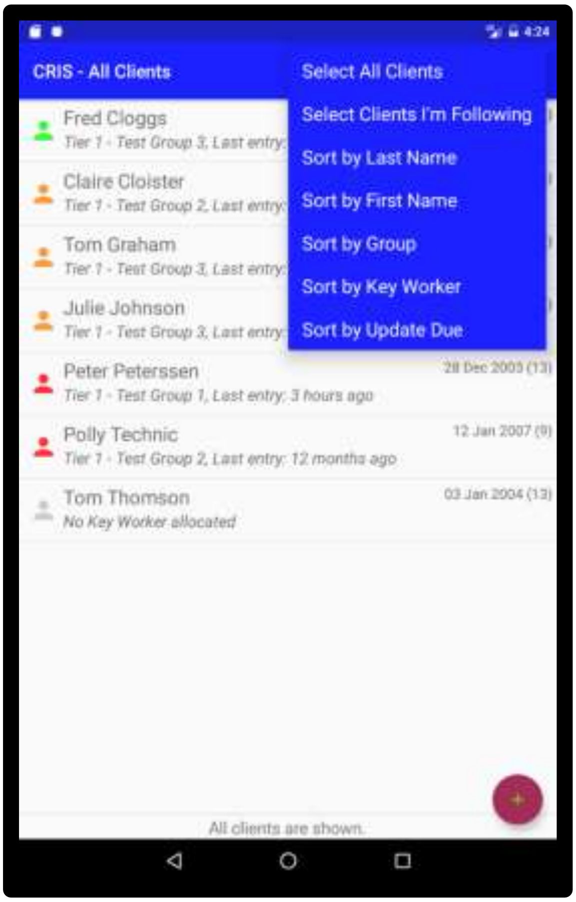
Library

A library of company policies, procedures etc.



Navigation and User-Interface

CRIS has a standard Android user-interface ensuring a fast learning curve. Links to email, phone and 'sharing' all operate as expected. The back-button returns the user to the previous screen. Menu options and search/sort can be selected from the title bar. A short press on documents displays their contents, a long press edits them (if allowed) and a long press on date fields shows the standard calendar picker.



Client Views

The amount of information shown differs according to each user's role. The name and date of birth/age is always displayed to enable clients to be recognised, and in this case, the status (icon colour) as well as details of the client's care and recent activity are visible.

Long Press

Press and hold a client to edit demographics.

Icon Colour

Clients are colour coded to indicate status.

Menu Options

Select and sort the client list for ease of use.

Create New Client

The 'floating' button is used to create a new client. The button is only visible on the All Clients view to help avoid duplicates.

Client Record

Click on a client to view the set of documents in that client's record.

Client Header

The client header appears on the list of client documents and at the top of each document. It contains demographic and status information to avoid duplicate data entry on forms. The ticks/crosses represent attendance at the last five sessions and the stars indicate the session rating.

Documents

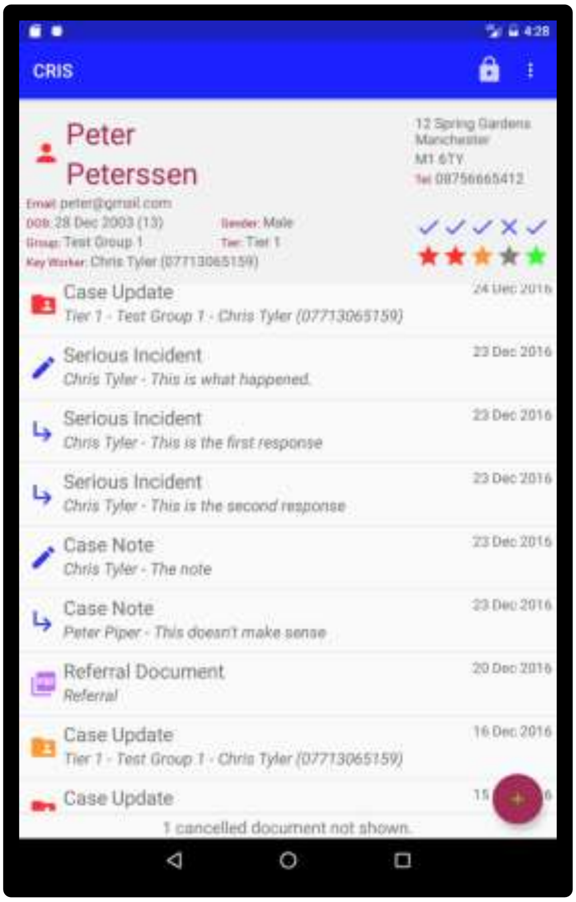
The client's record consists of different types of documents in chronological order.

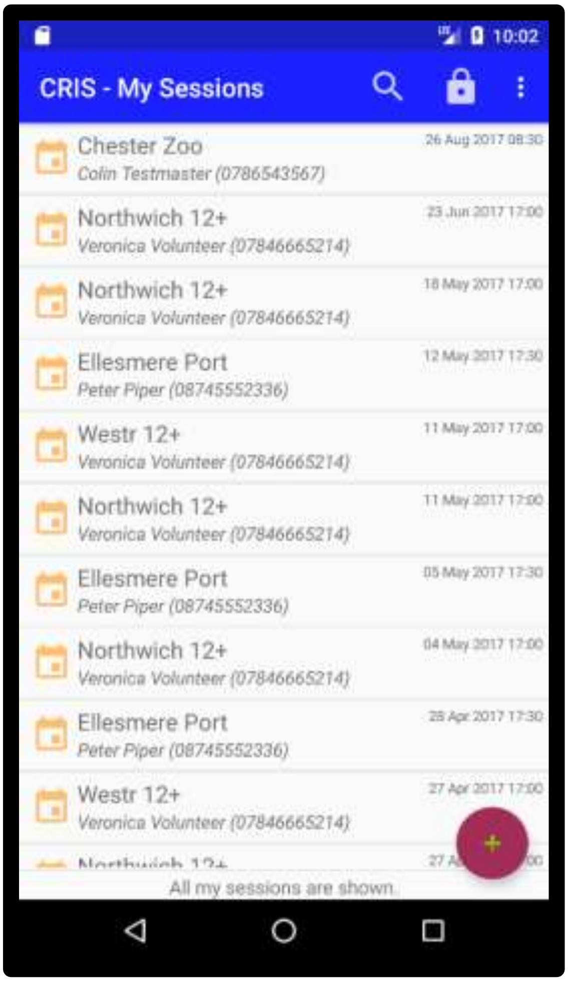
PDFs/Images

External and paper documents/images, are scanned into the record.

Note Documents

Notes range from simple telephone messages to records of serious incidents. Note types are pre-defined and each type may have a template to aid completion. Notes can have responses (as shown). Notes normally appear in chronological order but special 'sticky' notes always appear at the top of the record; useful for alerts/allergies etc.





My Sessions

Each entry is a session, some are regular repeating sessions, which display the associated Group, and others are one-off, ad hoc activities which display the activity title. The session coordinator (with contact phone number) and session date/time are always shown

Group Sessions

The location, coordinator, frequency and other details are stored once for each group and used to create sessions in a few clicks

Ad-Hoc Sessions

One-off activities can be created with bespoke locations, staff and background information.

Create New Session

The ‘floating’ button creates a new session. Clicking on an existing session displays its Session Register.

Session Register

Each session is managed through a session register which shows location, staff and unlimited additional information as well as managing the list of attendees. All information recorded in the session register also appears in the individual clients’ records.

Register

Attendance (and cancellation are easily recorded.

Transport

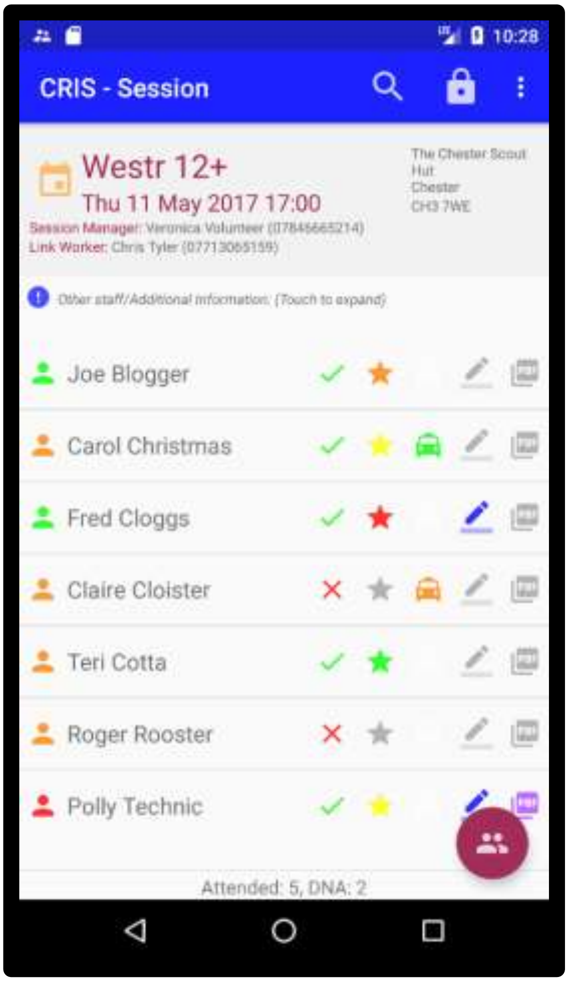
Transport can be booked and usage recorded.

Notes

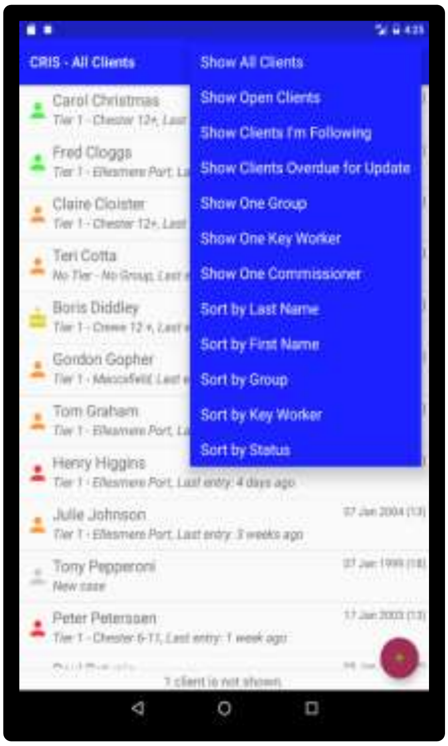
Notes and PDF documents are easily added.

Session Rating

An organisation configurable, document allows the client to provide a simple rating. The scores and attendance for the last 5 sessions then appears in the client’s header.



2.1 Client Lists



There are two client lists: All Clients and My Clients, the latter made up of clients where the user is currently the keyworker, co-worker or session volunteer for client's group. Keyworkers etc. are set in Case documents and may change over time. Additionally, clients may be 'followed' which not only adds them to My Clients but also notifies the user when the client's record is updated by another user.

Clients are shown as red, amber or green depending on their status. Status is set in 'case' documents to enable changes as the client journey unfolds. The status controls how often the client record should be updated and so which clients are shown as overdue.

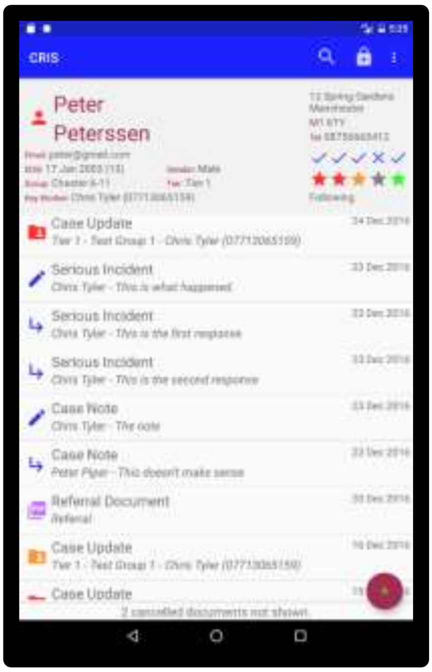
The three dots at the top-right of the screen display a menu. The 'show' options are mostly self-explanatory (open clients include clients who do not yet have Case documents and not those not Closed/Rejected). The number of hidden clients is at the bottom of the screen. The 'sort' options change the order of the clients.

The add button will create a new client if the user has sufficient privilege. New clients can only be created from the All Clients view to encourage checking for existing records; avoiding duplicates wherever possible.

Name, date of birth and age (in brackets) is always shown. The rest depends on the user's access.

Press to see the client's record, long-press to edit the demographic information (name, date of birth etc.) In general, a long press is used to edit documents.

2.2 The Client Record



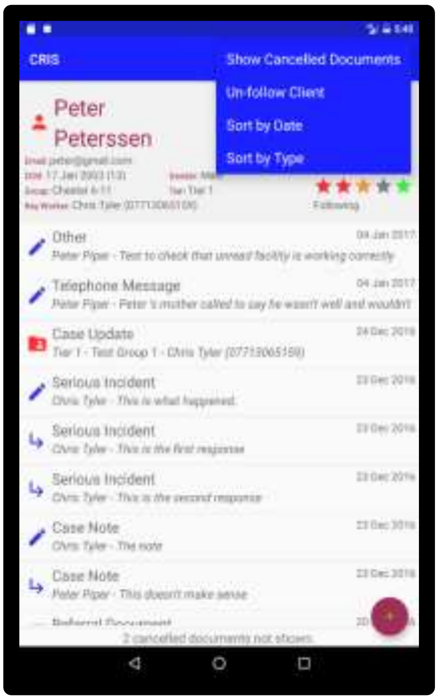
Each client's record consists of a set of documents in the same that way paper case notes are made up of documents stored in a folder.

Documents are shown chronologically, in a scrollable list, below a fixed header identifying the client and providing key information. Clicking on a document will display its contents.

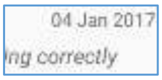
The header displays the client's name and status followed by demographic and case information. The header always shows the latest information. In this example, there are two case documents visible, one on the 16th Dec showing an amber status and a subsequent document on the 24th Dec which raised the status to red. The header reflects the later of the two.

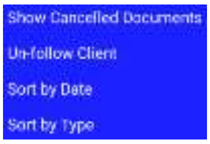
The attendance at the last five sessions is shown along with the rating score from each session (red/amber/green etc.)

Each document has an icon to indicate its type, here the first is a 'note' and the second is a 'case'. The top line indicates the document's type whilst the lower provides a summary of the contents.



Each document also has a relevant date setting its position in the client record. The Client (demographic) document uses the date of birth as its relevant date and is therefore always at the bottom of the list.

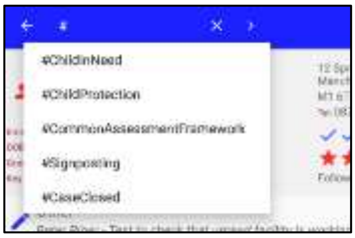




Documents cannot be removed from a client's record for obvious reasons but may be cancelled, hiding them unless 'Show Cancelled Documents' is used. The option 'Follow/Unfollow Client' controls whether this client is 'followed' by the user. When following a client, changes made by other users are displayed on the main menu.

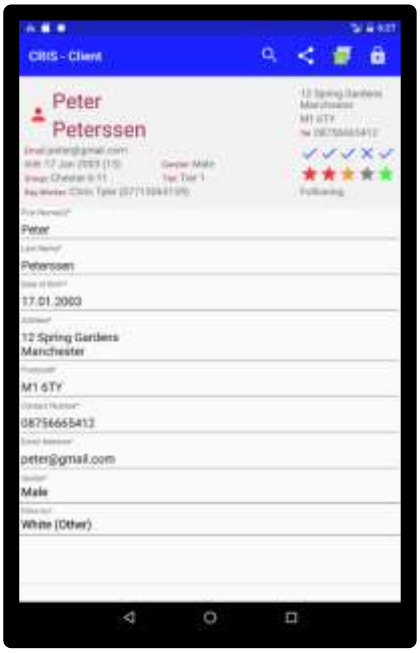
Usually, documents are shown chronologically. An exception to this are 'response' documents which are grouped with the original note, Also, notes may be made 'sticky' which keeps them at the top of the list; useful for notes recording allergies or other alerts which need to be kept visible.

The Search option allows the user to enter a search string in the top bar which then displays only documents which contain the text. Any text may be entered but typing a hash will show the list of pre-defined #hashtags which may be entered in note documents to make information easier to find. Note: text in PDF documents is not included in the search, but the summary associated with the PDF is searched so #hashtags and other key information may be entered there. Clicking starts the search and restores the full list.



Clicking the document will display its contents

2.3 Documents



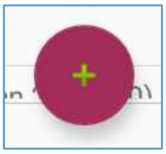
Every document includes a header (identical to the header in the client record) both to identify the document and to avoid duplicating demographic and other standard information.

The document type is shown in the header bar.

Each field has a field name and the content. The star indicates that the field is mandatory.

This symbol (in the options bar) will export the text contents of the document to an email or another 'app' on the tablet. It includes header information as well as the fields. This is especially useful with Note documents where the text includes both the note itself and its responses.

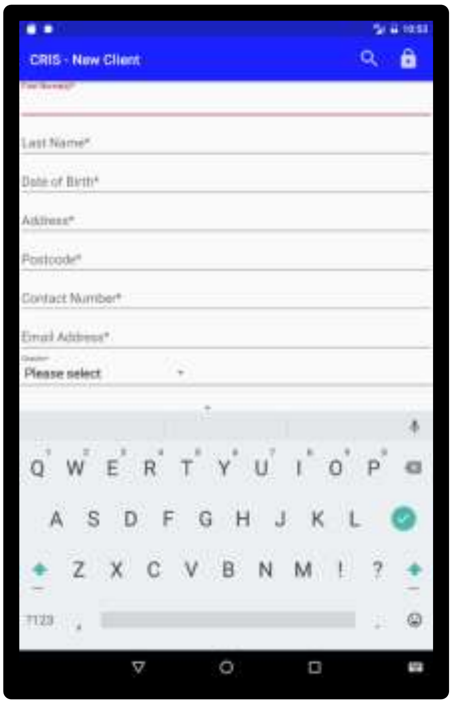
3.1 Create Client



New clients are created using the 'add' button at the bottom of the All Clients screen. The Show All Clients menu option should be used, showing closed and rejected clients, to avoid duplicating a record for an existing client.

3.2 Client Demographics

All the information on the client demographic document is mandatory so all of the fields need to be completed before using the Save button to create the new client record.



The Date of Birth is be entered in the form dd.mm.yyyy (e.g. 23.10.2003). However, a longpress on any date field in the CRIS application will display a 'date picker' in the standard format for the tablet / mobile

3.3 The New Client Record

Once the Client document has been added, the new client's record will look like this:

The header reflects the demographic information and the single client document just created appears below it.

New documents are then added to the record using the 'add' button in the bottom corner.

This displays a list of documents which may be created.

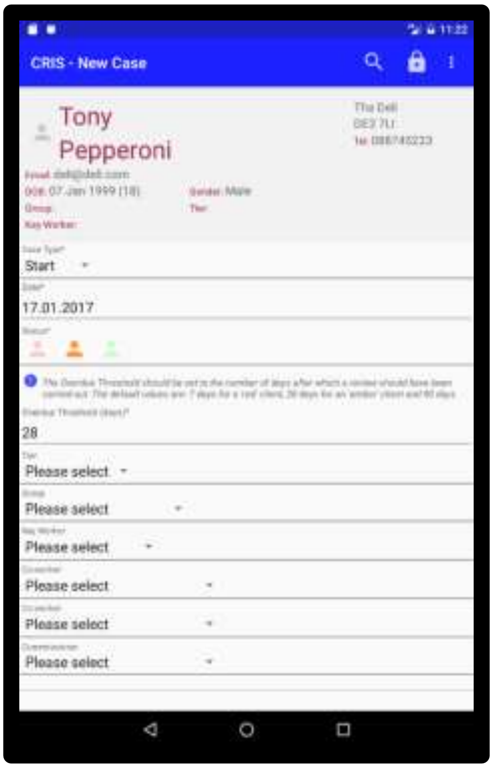
Documents may be added at any time but a 'case' document should be added at this stage to start the Client's 'journey'.

3.4 Adding a Case Document

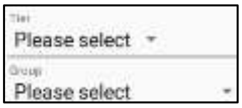
During the ‘client journey’, several Case documents will be added to the client’s record reflecting the start, status changes and eventual closure. The Case Type field will default to the most obvious value but may be changed by selecting a value from the list: Start, Update, Close and Reject.

The date will default to today but may be changed to reflect the actual date of the case start or change.

The Status can be set to Red, Amber or Green reflecting the current level. The colour is then used for the client’s icon throughout the system enabling the current status to be seen at a glance.



A change in the status also changes the ‘overdue threshold’, a value set by the organisation which reflects the frequency that updates to the record are expected. A view is available of clients who are outside this threshold, indicating that action may be required.



The remaining fields are all drop-down lists. The Tier, Group and Keyworker are mandatory when starting or updating, but it is also possible to set values on closed and rejected cases if relevant.

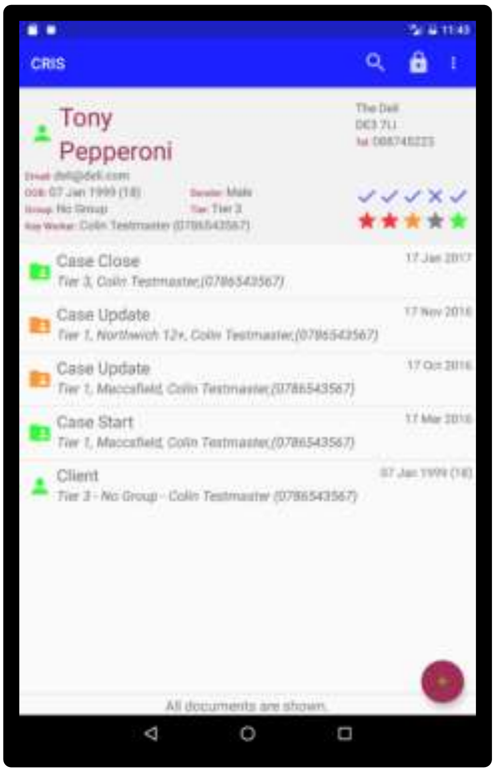
3.5 Case Update and Closure

Once a case has been started, the header will show the information from the most recent case document.

Each time the case details change, a new case record is created, with the relevant date, so that a history of changes is maintained. The type will be ‘Update’ until the case is closed.

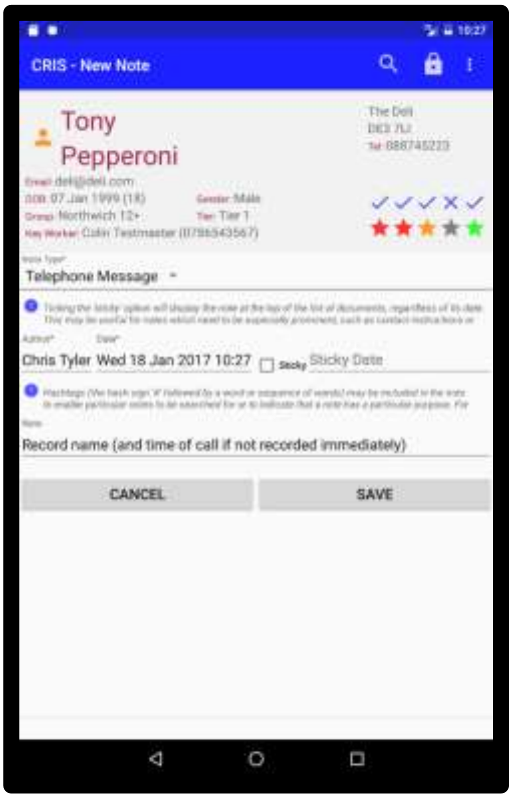
In this example, the status is changed from green to amber in October and the client moves to a different group in November before the case is closed the following January.

Obviously, in a real client’s record there would be many other documents interspersed between these case documents reflecting the activity which had taken place.



4.1 Types of Notes

The Note document may be used for a wide variety of purposes from simple telephone messages to a detailed case review. Notes have a ‘type’ and each organisation will create its own set of ‘note types’. The following scenario demonstrates some different aspects of the note functionality.



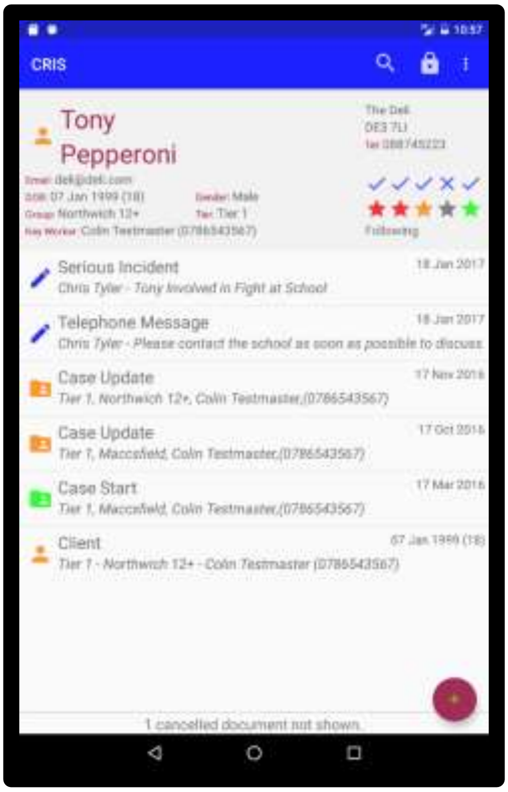
4.2 Telephone Message with Template

The first note is a simple telephone message and a template has been added to remind the user to record key details. Each ‘note type’ can have an organisation defined template from a simple reminder to a detailed structure for the document. Note text can be of any length. For now, let’s assume the telephone message was from the client’s school to report a serious incident, such as a fight.

4.3 Notification

Every person who is ‘following’ this client will see the new note in their list of unread documents and, assuming they are in wireless range, will receive the notification on their tablet within 30 minutes of the note being entered. The Linkworker and any co-workers automatically follow their clients, but anyone with access to a client’s record can choose to follow a client using a simple menu option.

4.4 Serious Incident Note



In this scenario, the Keyworker contacts the school and then adds a new ‘Serious Incident’ note to the client’s record. This is likely to detail the discussions with the school, relevant background information and may will request a series of further actions.

4.5 Automatic Follow

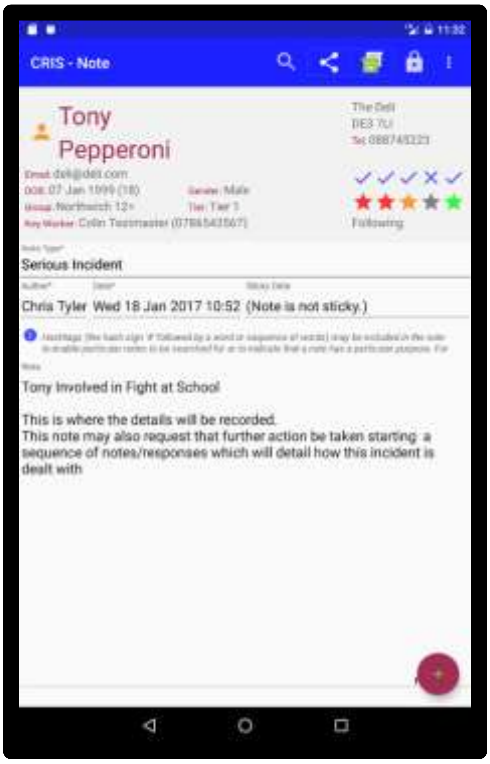
A useful feature enables some of the Note Types to trigger an ‘automatic follow’ when a note is created. This sets a group of supervisors and/or managers to ‘follow’ the client so that they start to get notifications of all additions to the client’s care record as soon as a note of this type has been created.

Being eligible for ‘automatic following’ depends on the user’s role. Organisations may create one or more roles with this setting.

The supervisor/manager can ‘un-follow’ a client at any point and so can choose how long to remain notified of changes to a client’s record after the initial trigger.

4.6 Response Notes

Whilst reading a note, such as our serious incident note, users can add a response using the 'add' button (bottom corner).



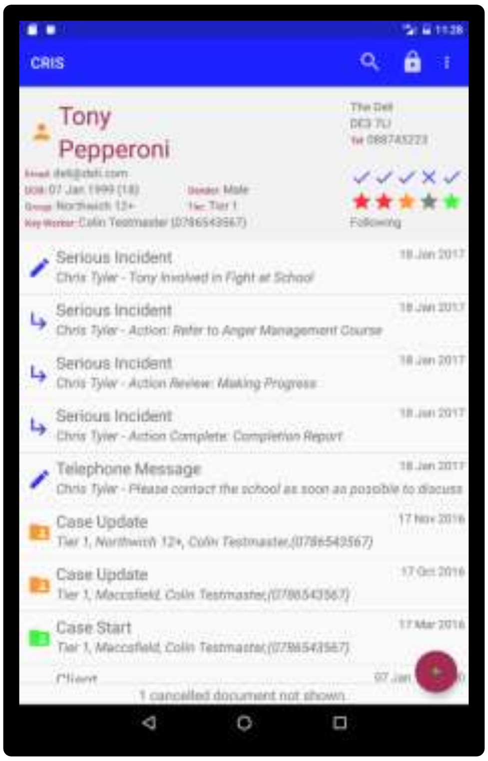
Response Notes are separate notes, with their own author and date/time. However, they are always grouped with the original note when displayed (like email replies). This enables an initial note to identify a series of actions and then each action to be tracked using a response note

To make the system easier to use, the responses are shown in the original note when it is being read. In this way, it is possible to read the whole sequence in a single note and use the option to transfer the note and its responses to an email.

A series of response notes can be seen on the right. Each is linked to the original note and the whole sequence is in chronological order.

4.7 #Hashtags

The text search option in the action bar makes it easy to find notes within a large care record. Organisation-wide hashtags make this process more refined since they can be used to add key words or phrases to a note to ensure that it is found in a search for the hashtag without returning notes when the word is used in another context.



4.8 Cancelling Notes

There are times when it may be sensible to remove invalid documents from a care record. Unfortunately, decisions may have already been made in the light of such documents so the history is important. Instead, the documents can be cancelled. Cancelled documents will not appear in the care record, unless the menu option 'Show Cancelled Documents' is used.

4.9 Sticky Notes

A sticky note will remain at the top of the client's documents either permanently (when ticked) or until the specified 'sticky date'. This is very useful for alerts which should be brought to everyone's attention. However, it is important not to overuse this feature. If there are too many 'sticky' notes they will cease to be prominent and simply get in the way!

5.1 The Contact Document

The Contact is used to record the details of people or organisations that you may need to contact on the clients' behalf. These come in three 'contact types' each storing slightly different information: personal contacts (such as family members), other agencies and schools. All contacts record the name of the contact, email, phone and address details. The documents also have an 'end date' where the contacts is no longer relevant or appropriate and an 'additional information' field to record helpful hints; best times to contact, reasons for ending etc.

Once entered, the contact document allows emails to be sent simply by clicking the email address. Similarly, contacts can be phoned by a single touch if the app is running on a mobile phone.

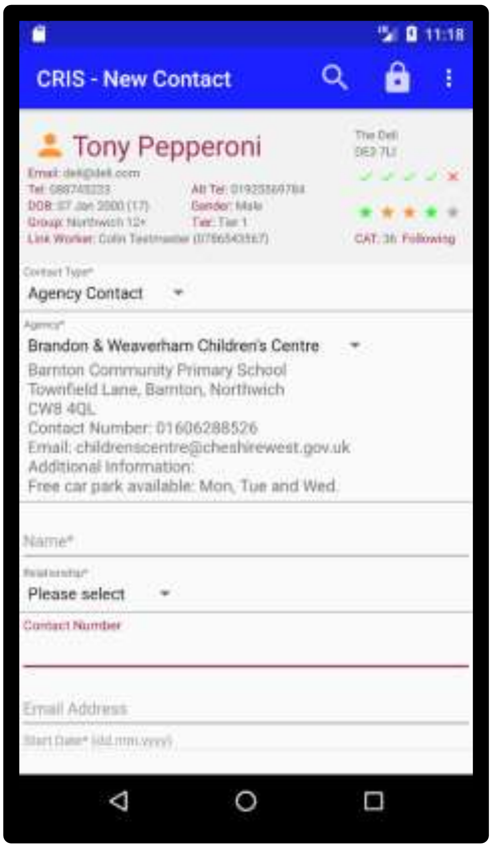
5.2 Personal Contacts

Personal contacts are used for any contact that is not associated with a school or other agency. A 'Relationship' field is used to describe the type of contact and organisations can create their own list of relationships to reflect working practices.

For ease of use, a longpress in the address field copies the client's address into the contact's address field.

5.3 Agency Contacts

Selecting an 'Agency Contact' alters the form to allow one of the pre-defined agencies to be used. The organisation can create an unlimited number of pre-defined agencies (other organisations) with their contact details, to make it quick and easy to add agency contacts, avoiding duplicate data entry and reducing typing errors.



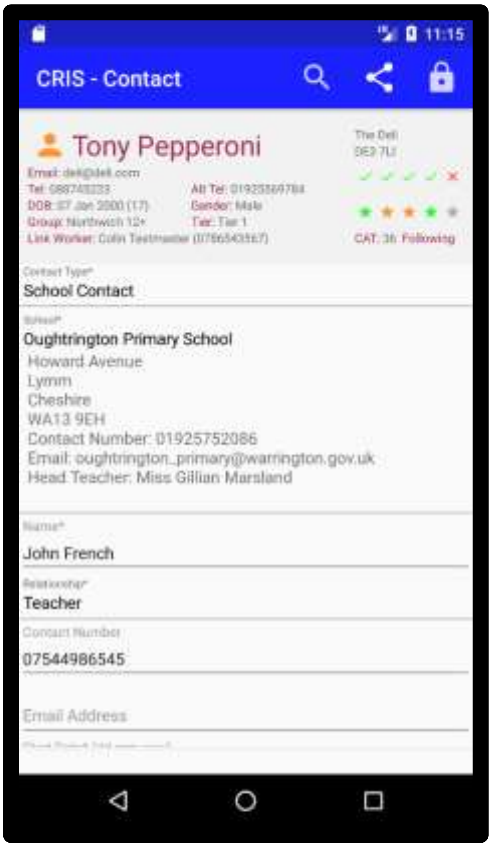
One significant advantage to this approach is that, if an agency's contact details change, then the organisation simply changes the underlying agency record and the new details appear on every client's contact records.

Each Agency Contact document records the specific contact name/relationship for that client with their contact details, if available.

The End Date field makes it possible to record changes by ending the current contact and then creating a new one; creating a historic record as well as showing the current contact.

5.4 School Contacts

School Contacts are similar to ‘agencies’ in that the organisation can create an unlimited number of schools which are then selected using a drop-down menu. Users then simply select the school and their contact details are displayed automatically.

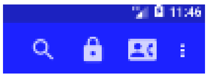


Once again, a specific contact is recorded for each client with their specific contact details and relationship to the client.

As the client moves through the school and different teachers become involved, the contact documents can be ‘ended’ and new ones created, providing a useful history.

There are no limits on the creation of contact documents, clients can have multiple, current contacts at a school (or agency) where both teachers and others (such as SENCOs) are involved.

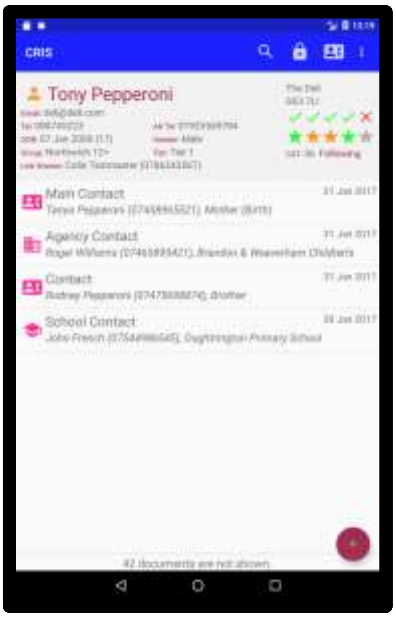
5.5 Show the Client’s Contact List



To make it quick and easy to see the list of clients, there is a ‘contact’ icon in the header bar which reduces the list of documents to just contacts.

In the example shown here, it is simply ‘three clicks’ to phone Tony’s mother:

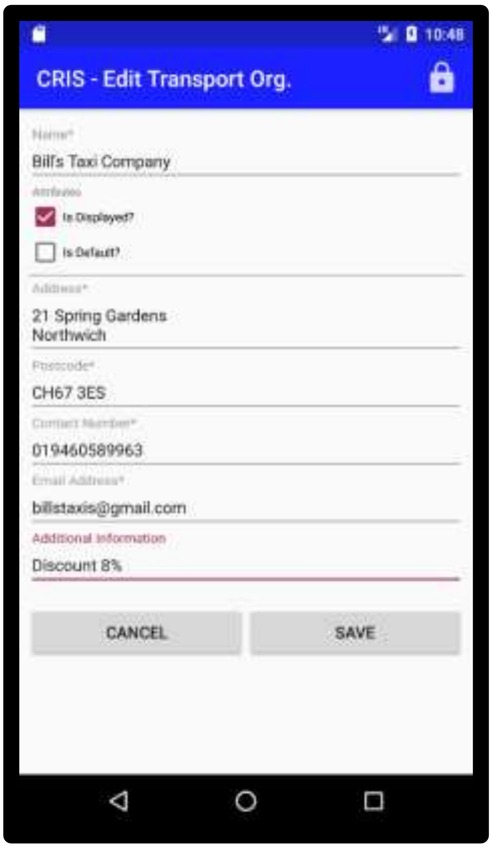
First click the contact icon to show this list of contacts:



Then, click ‘Main Contact’ to show his mother’s contact details:

Finally, click the phone number to make the call.

6.1 Transport Documents



Transport documents are used to manage the entire process of booking and then using taxis, minibuses etc. Transport Organisations are configured once in the system and then used to create transport documents in specific clients' records to manage booking and usage. This data (like all of the data in the CRIS system) can be exported to spreadsheets to enable further analysis.

6.2 Configuring Transport Organisations

To avoid duplicating information, transport organisations, (such as taxi companies) are configured as part of the system setup. Their contact details enable emails and phone calls to be made with a single click.

6.3 Transport Documents

To start the booking process, a new transport document is added to the client's record in the normal way. Selecting the transport organisation from the drop-down list displays the organisation's details.

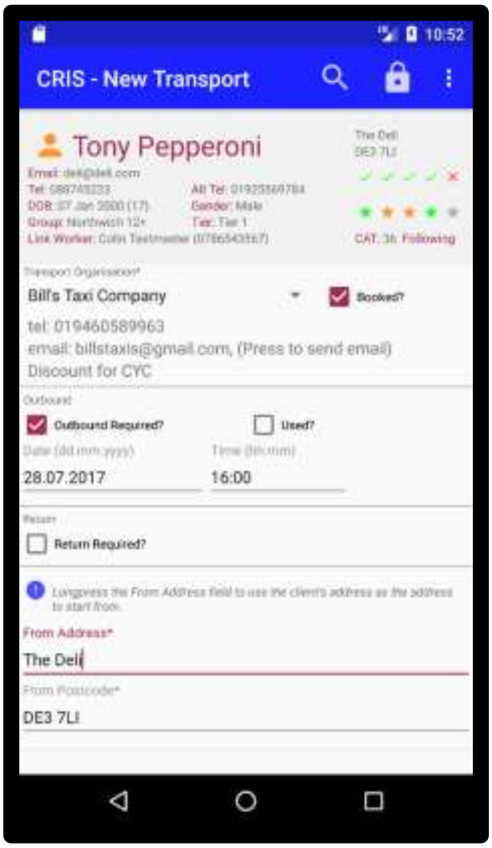
Information about the trip, one-way or two, where from/to and date/times are then added. Using the inbuilt facilities of the tablet/phone, the user can then phone or email the transport organisation by a single press on the phone number or email address. If the user chooses to email, the email is automatically populated with the details of the trip, saving typing and avoiding errors.

It is simple to record that the transport has been booked and the document icon in the client's list of documents will change from red to amber.

A further check-box indicates that the journey has been made, turning the icon from amber to green. This simple system allows users to easily record and keep track of progress.

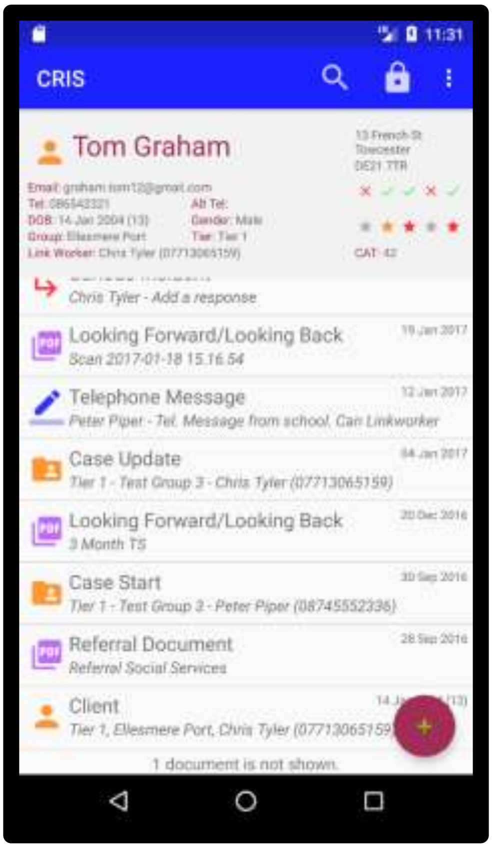
To make the process as simple and intuitive as possible, a long-press on the date and time fields will display the tablet/phone's standard date/time picker.

Additionally, a long-press of either the 'to' or 'from' addresses will automatically enter the client's address and postcode.



7.1 PDF Documents

This snapshot of a client's records shows three PDF documents, two client-completed paper assessments and an external referral document. This is just a tiny example of way PDF documents can be used.

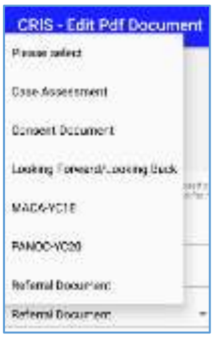


Anything that can be stored as a PDF document, from multi-page, scanned images to word-processor documents, can be held in the clients' records. Displaying the stored document anywhere and anytime is then simply a single click, using the tablet or mobile phone's built-in PDF Viewer to display the document.

The PDF documents are stored in an encrypted form in the app's database, making this a very secure way to hold confidential information, whilst ensuring that it is easily accessible to a user with appropriate access rights.

7.2 Adding a PDF

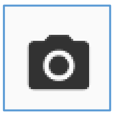
The 'add' button is used to add a new PDF document. The form is very simple, requiring only a 'summary' describing the PDF and a 'type' selected from a drop-down list. In the example shown on the right, 'Referral Document' is the type and Referral Social Services is the first line of the summary.



An unlimited number of PDF Types can be defined by the organisation, to reflect the documents in use, such as:

- Assessments and rating scales
- Letters
- Consent forms
- External documents
- etc.

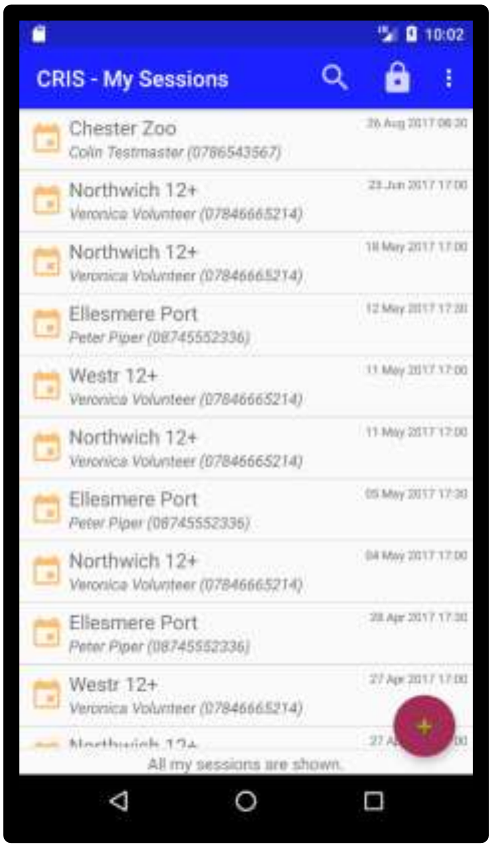
7.3 Images



Images are almost identically to PDF documents except that the object stored is a photograph rather than a document. As well as using images copied to the device, CRIS can make use of the in-built camera on the tablet or mobile phone.

As with PDF documents, the images are stored in an encrypted form within the CRIS database, they cannot be accessed using other apps on the device which maintains the necessary confidentiality.

8.1 Sessions



CRIS provides powerful functionality for creating and managing sessions and recording client attendance. Organisations can change the name to 'Activity' or any other relevant name. Sessions can repeat on a regular basis with the same (or changing) participants, or be one off, ad-hoc events.

The 'My Sessions' view, on the main menu, is a list of all sessions that involve the current user and is the gateway to the Session Register which manages individual sessions.

8.2 Sort and Select

Initially, My Sessions shows the list of today's and all future sessions

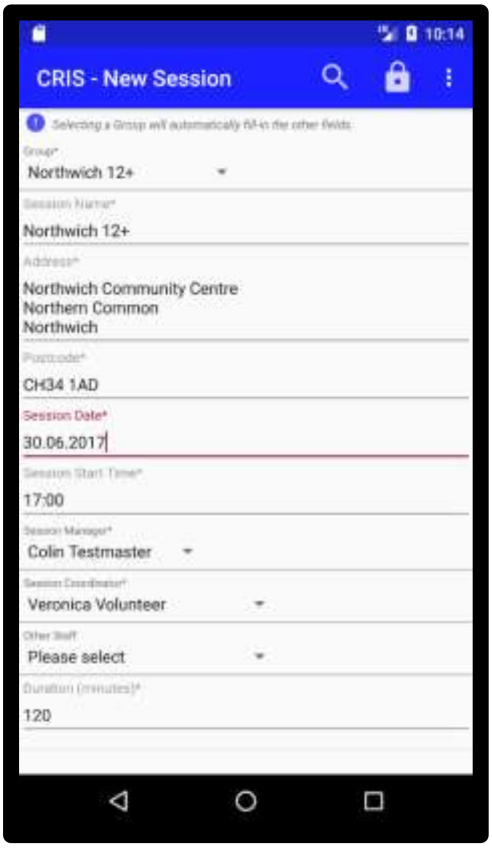
but the menu options enable historic and cancelled sessions to be shown.

Since a user may be involved with many different types of sessions, the menu options can restrict the list by group, session manager etc.

The list may also be sorted by name or date for ease of use.

8.3 Add a new Session

Most sessions repeat on a regular basis so 'adding' a new session creates the next instance in the sequence. The background information for repeating sessions is entered once, in a 'group' document so most of the new session form is filled-in automatically.

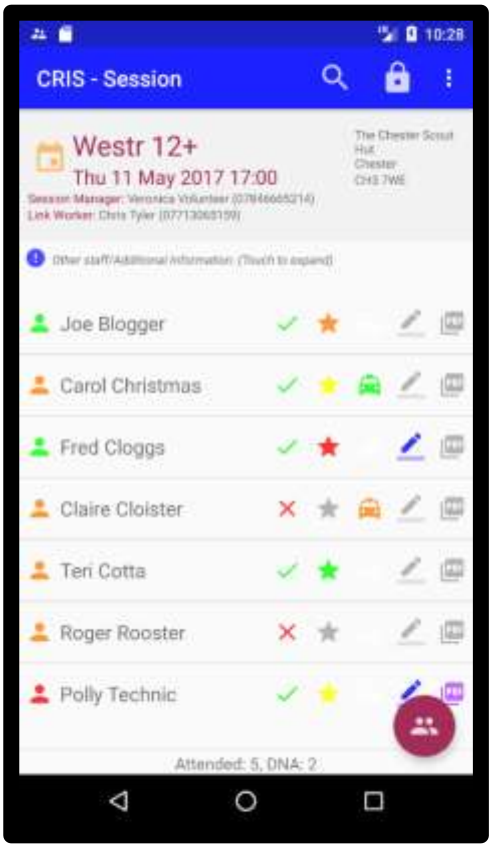


The Group document 'knows' the frequency of the sessions (daily, weekly etc.) so the next session date and time is calculated automatically. The session coordinator, other staff, duration etc. is also copied from the Group document (if it has been specified) but all fields can be changed, to handle special cases.

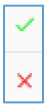
Finally, all the clients associated with the Group will be automatically invited to the session by the addition of 'session documents' in each of their client records.

In this way, most sessions are created with only two or three 'clicks'.

8.4 Session Register



Once the session has been created, a click will display its Session Register. As can be seen the session register can be used to quickly and easily manage 'attendance' and other session details.

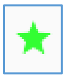


Marking attendance is simply a matter of clicking. Before the session date, this will cancel the invite to make a distinction between cancellations and DNAs (Did not attend).

Prior to the date of the session, the colour of the 'transport' icon shows whether the client needs transport and a click will create a new transport document to manage travel to and from the session. Once the session date has passed, the colour of the icon will show whether the transport was used. (As with all other CRIS data, this information can be exported for further analysis)

A note or a PDF document, associated with the session can be easily added to the client's record by clicking the appropriate icon. These may be added either before, during or after the session to record notes, outcomes, associated assessments/ratings or consent documents.

8.5 Session Rating



The star icon links to a 'session rating' form. The Session Rating is highly configurable using the 'local settings' to enable it to be tailored for different organisations.

Regardless of configuration settings, it will generate a single, average score for the session (between 1 and 6) which is converted to the colour (red, orange … purple) for the icon, in the list of client documents. The last 5 session ratings are also shown in the client's header along with the session attendance:

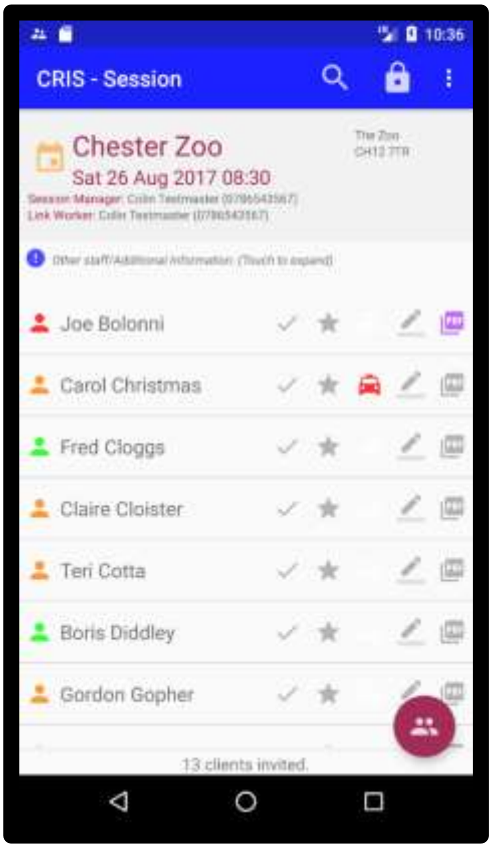
The overall title (My Week in this example) may be changed as well as the number of scales (up to 3) and label for each. Touching the 'smiley' faces or the bar sets the value, making it trivial to use.

The Session Rating has been designed to enable the tablet to be handed to the client to carry out the rating. Once complete, the tablet locks so that the client cannot see other parts of the record.

8.6 Ad-Hoc Sessions

Ad-hoc (one-off) sessions are created in the same way but no ‘group’ is selected and the session details: location, date, session coordinator etc. are set as required.

The Session Register is then created, but without any clients since there was no group from which to select clients.



8.7 Inviting Clients

The ‘add’ button then allows clients to be invited to the session by switching to the list of clients, as shown in the view below, and clients are invited using the ticks on the right-hand side.

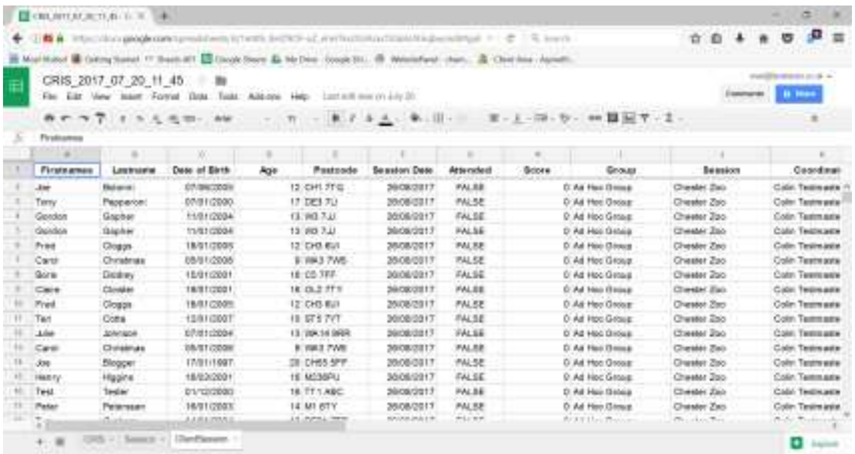
Clicking the ‘diary’ button returns to the Session Register displaying the list of invited clients (as shown here).

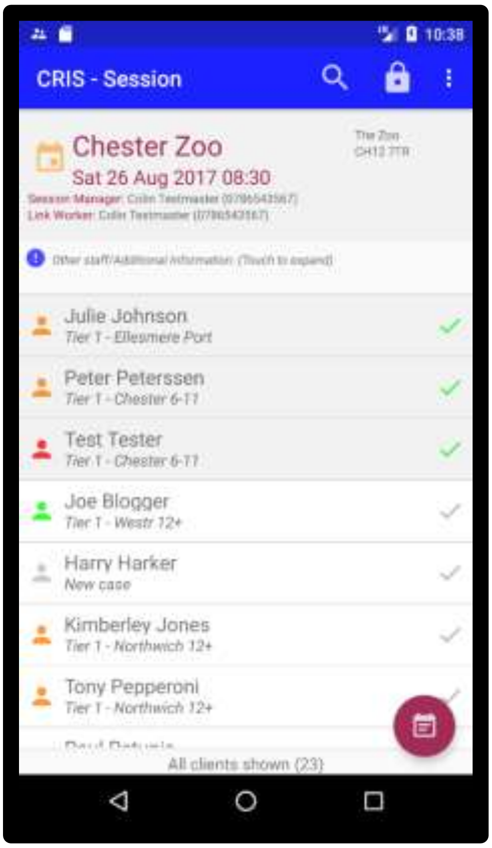
The user can switch between the two views at any time allowing clients to be added both before, during and after the session depending on how the register is being used.

The facility to invite other clients is not restricted to ad-hoc sessions and may be used to invite additional clients to instances of regular, repeating sessions if they have not yet been added to the Group.

8.8 Data Export

Both the My Sessions view and the Session Register have a ‘export’ in their menu. This will export the data, for one or more sessions, to a Google spreadsheet to enable further analysis.





CRIS

- Standard Android app available for tablets and mobile phones. No other hardware is needed and installation is simple and quick using the Google store.

- Flexible and comprehensive client records capable of holding demographics, contacts and associated staff as well as unlimited notes, PDFs, images, sessions etc.

- Users have full access to client records anywhere and anytime, regardless of mobile/wireless availability. Clients' records can be accessed and updated wherever users are located.

- The Android user interface provides familiarity, ensuring a fast learning curve and integration with phone, email and other device facilities.

- Changes to client records are replicated automatically between devices whenever a device is in mobile/wireless range. All communication is end-to-end encrypted so data is always safe.

- Client data is stored using industry-standard encryption and access to the app uses two-factor authentication and role-based access control to maximise client confidentiality.

- Suitably privileged uses can easily export data to Google Sheets for further analysis and management reporting.