



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



Improve 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.

Blackcreek CFMS – A Complete Client File Management System

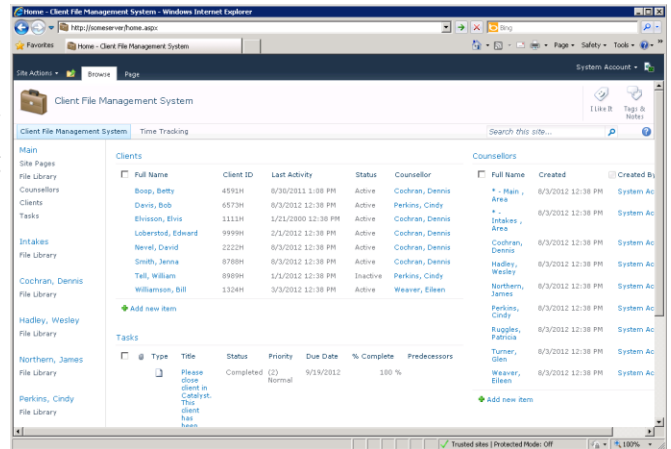
The Client File Management System (CFMS) is a SharePoint® based solution that allows the electronic client file to travel with the counsellor, while allowing other staff to access and update the client file as required. The client file is easily protected, controlled and audited throughout it's life.

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.



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.



Blackcreek 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 Technologies

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.