

# CAFAS v5.4

## CLINICIANS SOFTWARE TRAINING

### AGENDA

1. Accessing the CAFAS software
2. Entering a Rater Name and ID
3. Opening a New Client File
4. Entering a New CAFAS Evaluation
5. Editing or Amending Client Information
6. Editing or Amending a CAFAS Evaluation
7. Creating a Treatment Plan
8. Adding Notes to the Client Assessment Report
9. Adding an Exit CAFAS Evaluation
10. Entering Service Delivery Information
11. Closing a Client File
12. Re-Opening a Client File

## NAVIGATING THE CAFAS 5.4 SOFTWARE

### *Important notes before you begin.*

- ★ Do not use the Enter key. Use the Tab key to move from one data entry field to the next.
- ★ To save your work, move to another screen within the CAFAS software.
- ★ Careful about using the Cancel and Back button. Anything new you have just entered on that screen will be erased as you move back to the previous screen.
- ★ When you are done, click on Exit Program on the blue navigation bar to save your work before exiting the program.

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### 1. TO ACCESS THE SOFTWARE

On the opening screen of the CAFAS software, select your site by clicking on the black arrow. Enter your password and click on the blue Click Here to Accept License Agreement bar.

### 2. TO ENTER A NEW RATER

On the Select Existing Case screen, notice the blue navigation bar at the top of the screen. It has several menu tabs, beginning with Main Menu on the left and ending with Exit Program.

To input a new rater or to check which raters have already been entered into the system, click on the Main Menu tab. From the drop-down menu, select Browse Raters.

On the Browse the Rater Files screen, check if your name and ID number are listed.

To enter a new rater, click on the Add button below the raters box. On the Adding/Changing a Rater Record screen, enter the Rater ID and Name of the rater.

### 3. TO OPEN A NEW CLIENT FILE

To input a new client, click on the Main Menu tab. From the drop-down menu, select Create New Case.

On the Client Identification and Background screen, enter all relevant information on your client. Be sure to check your dates for accuracy. Remember the CAFAS Common Data Set elements that need to be entered on this screen.

**\*\* You are required to enter data for each section preceded by a red Maple leaf**



You are now ready to enter a CAFAS evaluation.

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### 4. TO ENTER A NEW CAFAS EVALUATION

Click on the CAFAS Evaluation menu tab on the blue navigation bar. From the drop-down menu, select Rate New CAFAS.

Enter all relevant information. When you are done, click on View CAFAS Items Selected from the CAFAS Evaluation drop-down menu on the blue navigation bar. Check to see that you have entered all items correctly.

The two mandated CAFAS evaluations for all clients 5-17 years of age (or kindergarten through grade 12) is an **Entry CAFAS (T1)** and **Exit CAFAS (T14)**. If the client is in treatment for more than one year, you are also required to complete an annual CAFAS one year after the T1.

**\*\* Be sure NEVER to use the Optional: Second Entry CAFAS (T2).**

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### 5. TO EDIT OR AMEND A CLIENT'S INFORMATION

On the Select Existing Case screen, select your client's file by clicking the radio button (small circle) next to your client's name. *You will see your client's name appear in the pink bar at the top of your screen.*

Click on the Main Menu tab on the blue navigation bar and select Edit Background from the drop-down menu.

On the Client Identification and Background screen, make your changes.

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## **6. TO EDIT OR AMEND A CAFAS EVALUATION**

Once you have selected your client's file and your client's name is reflected in the pink band at the top of the screen, click on the Cafas Evaluation menu tab on the navigation bar.

From the drop-down menu, click on Select Prior Cafas Evaluation. On the Prior Cafas Evaluations screen, select the evaluation you want to access by clicking on the button to the left of the date. Now click on the blue CAFAS Ratings tab, the last tab on the right.

On the Rate CAFAS screen, check that this is the previous evaluation you want to amend and make your changes.

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## **7. TO CREATE A TREATMENT PLAN**

Once you have accessed your client's file, click on the CAFAS Evaluation tab on the blue navigation bar. From the drop-down menu, select Strengths and Goals. On the Endorse Strengths and Goals screen, select some appropriate strengths and a goal for treatment in each area of your client's functioning.

Then, select Treatment Plan from the CAFAS Evaluation drop-down menu. Click on Add to Plan. On the Treatment Plan screen you will notice that the items you already endorsed in rating the CAFAS, as well as the strengths and goals, have automatically been transferred to the Treatment Plan.

Click your cursor in the Plan: box in each subscale section and enter notes on how you plan to reach your treatment goals.

To save your Treatment Plan, click on the CAFAS Evaluation menu tab, select Treatment Plan and Preview for Printing.

Print your Treatment Plan by clicking on the Print menu tab on the blue navigation bar.

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## **8. TO ADD NOTES TO THE ASSESSMENT REPORT**

All CAFAS items endorsed in the rating, together with information entered on the Client Identification and Background screen, will appear on the Assessment Report.

A bar graph of your CAFAS rating, providing visual data on your client's functioning, will appear at the end of the Assessment Report.

You can include your own clinical notes on the Assessment Report in the Summary section. Click on the CAFAS Evaluation menu tab and select Assessment Report - Add Summary from the drop-down menu.

Place your cursor in the Add Summary to Client Assessment Report box and type your text. You can cut-and-paste or copy-and-paste text in this box to or from other word processing applications.

Now, click on the CAFAS Evaluation menu tab and select Assessment Report - Preview for Printing from the drop-down menu.

The Assessment Report will appear on your screen. Click the Print tab to print your report.

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### CLOSING A CAFAS FILE OR CASE

**\*\* There are 3 steps required to close a case!**

#### Step 1:

#### 9. TO ADD AN EXIT CAFAS EVALUATION (T14)

Access your client's file by selecting your client on the Select Existing Case screen. Click on the button next to your client's name and check that the name appears in the pink band at the top of your screen.

Click on the CAFAS Evaluation tab on the blue navigation bar. From the drop-down menu, select Rate New Cafas.

On the Rate CAFAS screen, enter a new CAFAS evaluation. Be sure to endorse Exit from service (T14) in the CAFAS Administration section.

Now, click on View CAFAS Items Selected from the CAFAS Evaluation drop-down menu to check your items.

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#### Step 2:

#### 10. TO ENTER SERVICE DELIVERY INFORMATION

Service Delivery information is part of the CAFAS Common Data Set and must be entered at the time of your client's Exit from service (T14) evaluation.

Click on the CAFAS Evaluation menu tab. Select Service Delivery from the drop-down menu.

Enter the data on the Service Delivery Information screen.

**Step 3:**

**11. TO CLOSE A FILE**

Click on the Close Episode menu tab on the blue navigation bar.

Enter the date in the Date Closed box. (Ideally, it should be the same as the date for the Exit CAFAS.)

Complete the remainder of this screen.

On the Main Menu drop-down menu, click on Select Existing Case. On the Select Existing Case screen, check that the Status of your client's file now shows Closed.

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**12. TO RE-OPEN A FILE**

On the Select Existing Case screen, select the client's file you want to re-open. *Check that your client's name is reflected in the pink band at the top of your screen.*

Click on the Close Episode menu tab on the blue navigation bar.

On the Close Episode screen, remove the date and all information from this screen by clicking on the blue **Clear** tab, just below the Choose Date tab.

Check that the file has now been re-opened by clicking on the Main Menu tab on the navigation bar and selecting Select Existing Case. The Status of your client's file should now be reflected as Open.

**\*\* If a client leaves treatment and returns for treatment for any reason, a NEW case is to be created!**

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<p>If you need help navigating the software please call or email: <b>Nicole Benjamin de Perez</b> <a href="mailto:nicole.benjamindeperez@sickkids.ca">nicole.benjamindeperez@sickkids.ca</a> 416-813-7654 ext 2636</p>
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