



Medicaid Technical Assistance Center

AN HFS - UNIVERSITY OF ILLINOIS SYSTEM PARTNERSHIP

<https://hfs.illinois.gov/medicalproviders/mtac.html>
info.MTAC@illinois.gov

217-244-3212

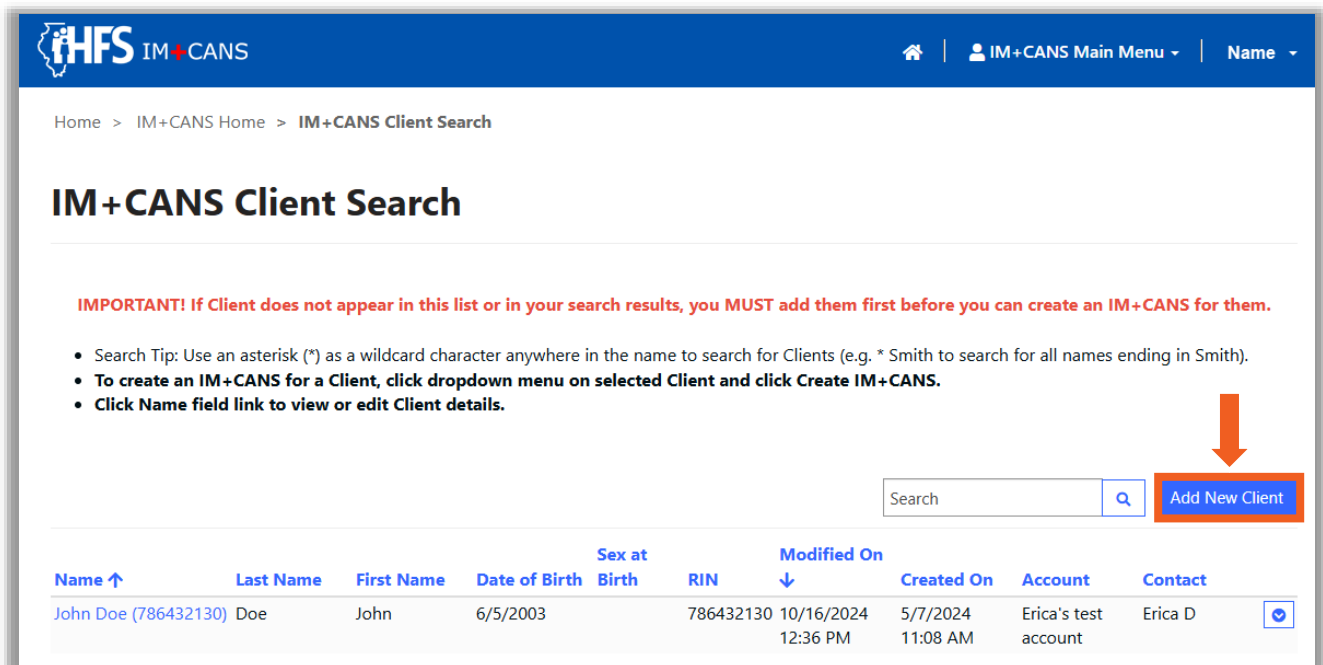
IM+CANS Portal Direct Data Entry (DDE) User Guide

1 | Adding a New Client

Once logged into the portal, select the “IM+CANS Main Menu” dropdown at the top of the page and select “IM+CANS Client Search”.




You will see a list of the clients you have access to. At the top of that list, you will see a blue box, labeled “Add New Client”. Select this box.





NOTE: If you receive the error below, the client already exists, and only a consent form is needed. (See “3 | Adding a Consent” below.)

⚠ A record that has the attribute values RIN already exists. The entity key RINKey requires that this set of attribute contains unique values. Select unique values and try again.

This brings you to the following page, “Add Client Master Record”, where you will enter the client’s information. Once completed, select the “Submit” button at the bottom of the page.



 |  IM+CANS Main Menu ▾ | Name ▾

Home > Add Client Master Record


Add Client Master Record


Please fill-out all applicable fields. A red asterisk (*) indicates the field is **Required**.

Note: Changes to the Client Master record are **not** reflected within existing IM+CANS assessments.

Client Information

General Information

First Name *	Last Name *	Preferred Name	Pronouns
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone	RIN *	Date of Birth *	Sex at Birth
<input type="text"/>	<input type="text"/>	<input type="text" value="M/D/YYYY"/> 	<input type="text" value="Select"/> ▾
Ethnicity	Primary Language	County	Gender Identity
<input type="text" value="Select"/> ▾	<input type="text"/>	<input type="text" value="Select"/> ▾	<input type="text" value="Select"/> ▾
Address	Race	Race Other	Gender Identity Other
<input type="text"/>	<input type="text" value="Select"/> ▾	<input type="text"/>	<input type="text"/>
Interpreter Services	City	State	Zip Code
<input type="text" value="Select"/> ▾	<input type="text"/>	<input type="text" value="Select"/> ▾	<input type="text"/>
Living Arrangement	Spoken Language	Interpreter Services Other	Marital Status
<input type="text" value="Select"/> ▾	<input type="text"/>	<input type="text"/>	<input type="text" value="Select"/> ▾
Living Arrangement Other	Household Size	Household Income	Insurance Coverage
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> No <input type="radio"/> Yes
Employment Status	Guardian Status	Guardian Status Other	Insurance Company
<input type="text" value="Select"/> ▾	<input type="text" value="Select"/> ▾	<input type="text"/>	<input type="text"/>
Education Level	Client Verified		
<input type="text" value="Select"/> ▾	<input checked="" type="radio"/> No <input type="radio"/> Yes		



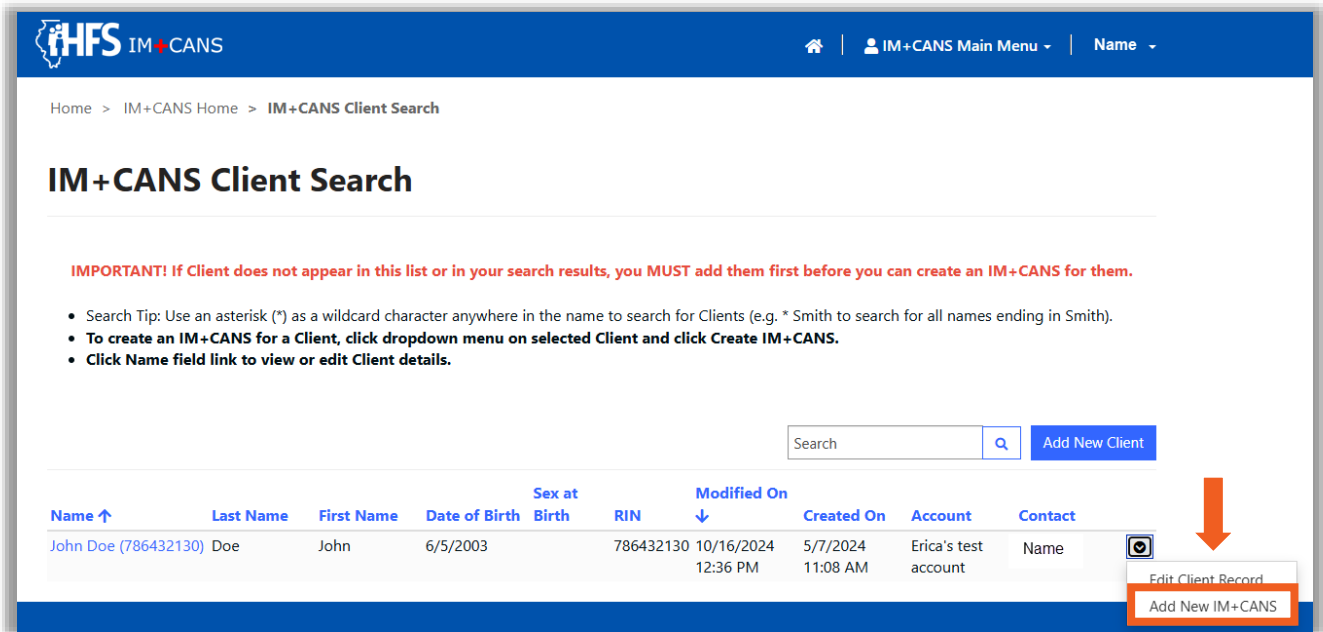
2 | Adding an Assessment

Select the “IM+CANS Main Menu” dropdown at the top of the page and select “IM+CANS Client Search”.



After selecting “IM+CANS Client Search”, all clients you have access to will be shown here. There are two ways to add an assessment.

Option 1: Find the client and select the dropdown arrow next to “Contact” and choose “Add New IM+CANS”.



Option 2: Alternatively, you can select the client’s name.

[Home](#) > [IM+CANS Home](#) > [IM+CANS Client Search](#)

IM+CANS Client Search

IMPORTANT! If Client does not appear in this list or in your search results, you MUST add them first before you can create an IM+CANS for them.

- Search Tip: Use an asterisk (*) as a wildcard character anywhere in the name to search for Clients (e.g. * Smith to search for all names ending in Smith).
- To create an IM+CANS for a Client, click dropdown menu on selected Client and click **Create IM+CANS**.
- Click Name field link to view or edit Client details.

Name	Last Name	First Name	Date of Birth	Sex at Birth	RIN	Modified On	Created On	Account	Contact
John Doe (786432130)	Doe	John	6/5/2003		786432130	10/16/2024 12:36 PM	5/7/2024 11:08 AM	Erica's test account	Name

This will bring you to their Master Record. Now you can scroll to the bottom of the page, where you will see “IM+CANS Related To This Client”. Select “Add New IM+CANS”. Then select “Submit”.

IM+CANS Related To This Client

CANS ID	RIN	Last Name	First Name	Client	Account	Contact	Modified On	Created On
IMC-20250108-1457-610	786432130	Doe	John	John Doe (786432130)	Erica's test account	Name	1/8/2025 2:59 PM	1/8/2025 2:57 PM
IMC-20241016-1236-282	786432130	Doe	John	John Doe (786432130)	Erica's test account	Name	10/16/2024 12:36 PM	10/16/2024 12:36 PM

NOTE: If you are adding a reassessment or doing an update, select the dropdown arrow of the existing IM+CANS you want to base it on, which will populate the client's information from that IM+CANS. Please note, this may take a minute for the workflow to run.

IM+CANS Related To This Client

CANS ID	RIN	Last Name	First Name	Client	Account	Contact	Modified On	Created On
IMC-20250108-1457-610	786432130	Doe	John	John Doe (786432130)	Erica's test account	Name	1/8/2025 2:59 PM	1/8/2025 2:57 PM
IMC-20241016-1236-282	786432130	Doe	John	John Doe (786432130)	Erica's test account	Name	10/16/2024 12:36 PM	10/16/2024 12:36 PM

Either way you choose to add the assessment, it will bring you to the “Add New IM+CANS” page. Here you select the “CANS Type” by selecting the appropriate radio button.

The screenshot shows the 'Add New IM+CANS' page. At the top, there is a blue header with the 'iHFS IM+CANS' logo and navigation links. Below the header, a breadcrumb trail reads 'Home > Add New IM+CANS'. The main heading is 'Add New IM+CANS'. A note states: 'Fill-out all applicable fields. Fields with a red asterisk * are required.' Below this, there are tabs for 'Choose IM+CANS Type', 'IM+CANS (Section 1)', 'IM+CANS (Section 2-16)', 'Client Strengths', 'Caregiver Info', and 'DCFS Youth'. Under the 'Choose IM+CANS Type' tab, there are three radio buttons: 'Initial', 'Reassessment', and 'Update'. An orange box highlights these radio buttons, and an orange arrow points to the 'Initial' option. Below the radio buttons is a blue 'Next' button.

NOTE: The CANS Types are as follows:

- “**Initial**” is a new IM+CANS;
- “**Reassessment**” is completed 180 days after the initial IM+CANS has been completed; and
- “**Update**” is used to make changes to an existing IM+CANS during the 180-day period between Initial and Reassessment.

After selecting “Next” you will come to the screen below, where you will see sections across the top. As you navigate through each section, you will enter your client’s information, selecting “Next” after each section.

The screenshot shows the 'Add New IM+CANS' page after selecting 'Next'. The 'Choose IM+CANS Type' tab is now selected and has a checkmark. The 'IM+CANS (Section 1)' tab is also highlighted with an orange box. Below the tabs, there is a section titled '1. General Information'. Under this section, there is a heading 'CUSTOMER INFORMATION'. Below this heading, there are four input fields: 'First Name' (containing 'John'), 'Last Name' (containing 'Doe'), 'RIN' (containing '786432130'), and 'CANS ID' (containing 'IMC-20250108-1457-610').

NOTE: If you do not select “Next” at the end of each section, the portal will not save the information you have entered.

Once you have completed all sections, you will see the “Approvals” screen, where staff signature and date are entered. Then select “Submit”.

The screenshot shows the 'Add New IM+CANS' page in the iHFS IM+CANS portal. The header includes the iHFS logo and navigation links. The breadcrumb trail is 'Home > Add New IM+CANS'. The main heading is 'Add New IM+CANS'. Below it, a message states: 'Fill-out all applicable fields. Fields with a red asterisk * are required.' A horizontal menu contains several tabs: 'Choose IM+CANS Type', 'IM+CANS (Section 1)', 'IM+CANS (Section 2-16)', 'Client Strengths', 'Caregiver Info', 'DCFS Youth', 'Summary of CANS Needs/Strengths', 'Treatment Plan', and 'Approvals'. The 'Approvals' tab is currently selected. Below the tabs, the section is titled '19. IM+CANS Signatures'. Under this, it says 'Staff Responsible For IM+CANS Development, Review, and Modification Signature'. There are two input fields: 'LPHA Signature' and 'LPHA Approval Date'. The 'LPHA Approval Date' field has a date picker icon and shows 'M/D/YYYY'.

After selecting “Submit”, and if there are no errors, you will see the following message, confirming your submission was successful.

This screenshot shows the same 'Add New IM+CANS' page, but now a green message box at the bottom states: 'Submission completed successfully.' The rest of the page, including the header, breadcrumb, heading, instructions, and tabs, remains the same as in the previous screenshot.

3 | Adding a Consent

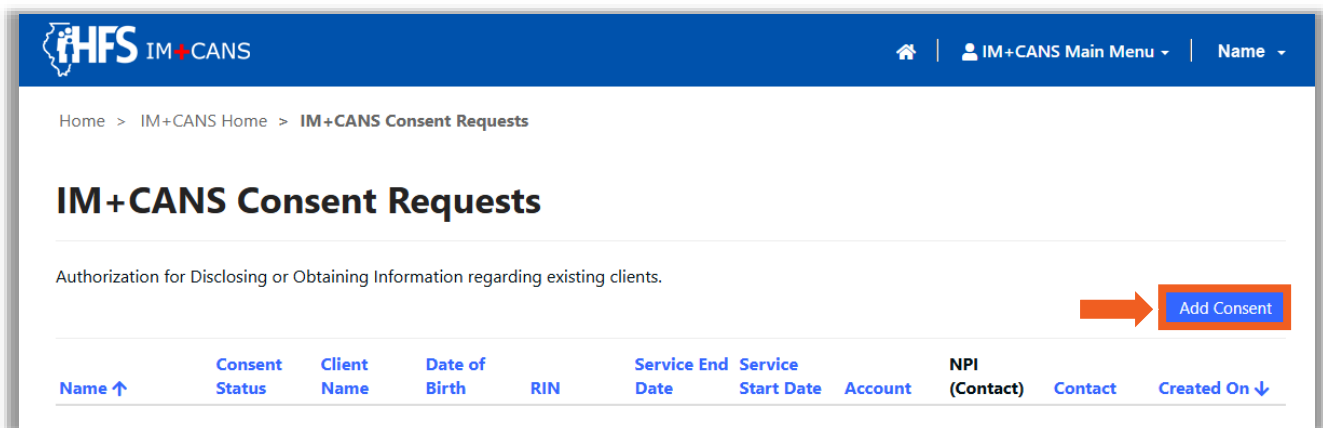
If your client already exists in the portal, and you received the RIN error when trying to add a new client, then you need to add a consent. Adding a consent will allow the client's previously entered information to be shared with you.

⚠ A record that has the attribute values RIN already exists. The entity key RINKey requires that this set of attribute contains unique values. Select unique values and try again.

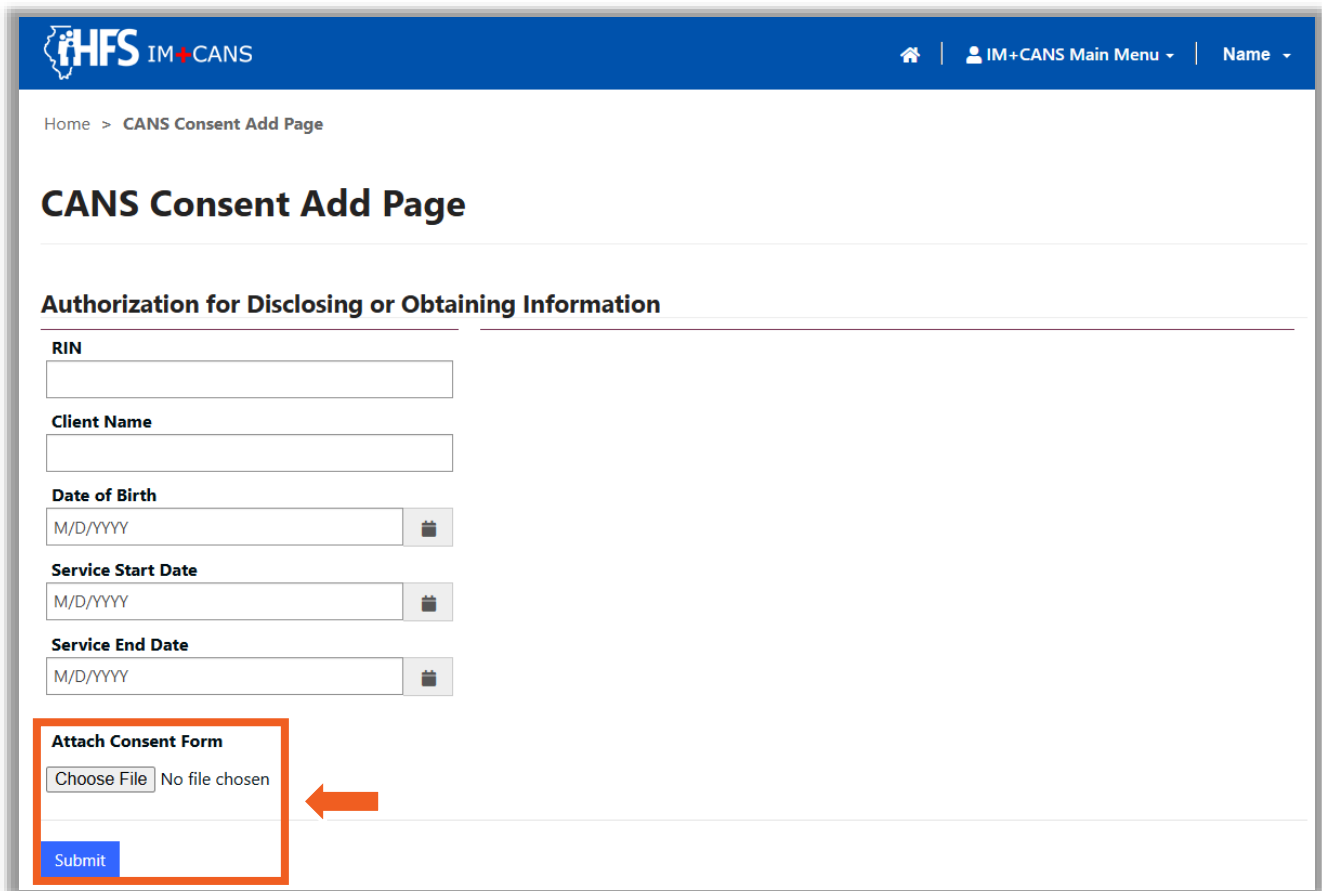
At the top right of the page, select the "IM+CANS Main Menu". Navigate to and select "IM+CANS Consent Requests".



This will bring you to the "IM+CANS Consent Requests" page. Select "Add Consent".

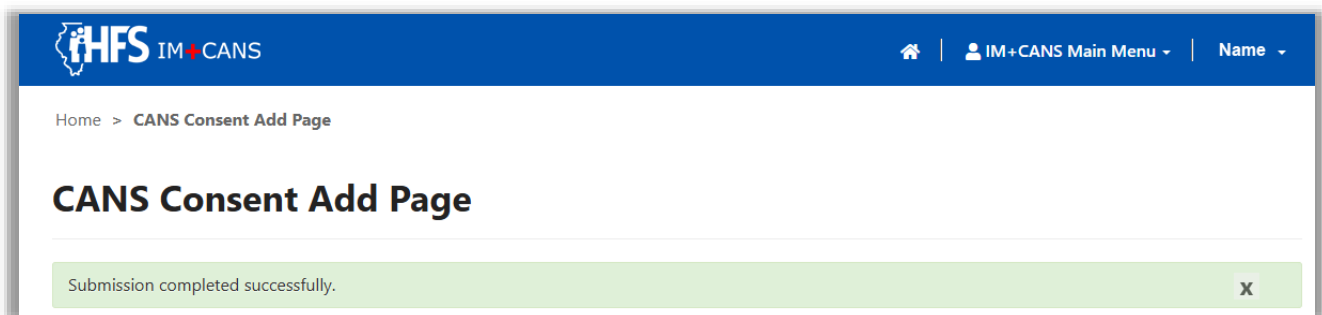


This will bring you to the “CANS Consent Add Page”. Here you can enter as much information as you have on the client, upload your consent form, and select “Submit”.



The screenshot shows the "CANS Consent Add Page" interface. At the top is a blue header with the "IHFS IM+CANS" logo on the left and navigation links for "Home", "IM+CANS Main Menu", and "Name" on the right. Below the header, a breadcrumb trail reads "Home > CANS Consent Add Page". The main heading is "CANS Consent Add Page". Underneath is a section titled "Authorization for Disclosing or Obtaining Information". This section contains several form fields: "RIN", "Client Name", "Date of Birth" (with a calendar icon), "Service Start Date" (with a calendar icon), and "Service End Date" (with a calendar icon). Below these fields is a section titled "Attach Consent Form" which is highlighted with a red rectangular box. Inside this section, there is a "Choose File" button and the text "No file chosen". An orange arrow points from the right towards the "Choose File" button. At the bottom left of the "Attach Consent Form" section is a blue "Submit" button.

After selecting “Submit”, you will see that your submission was completed successfully.

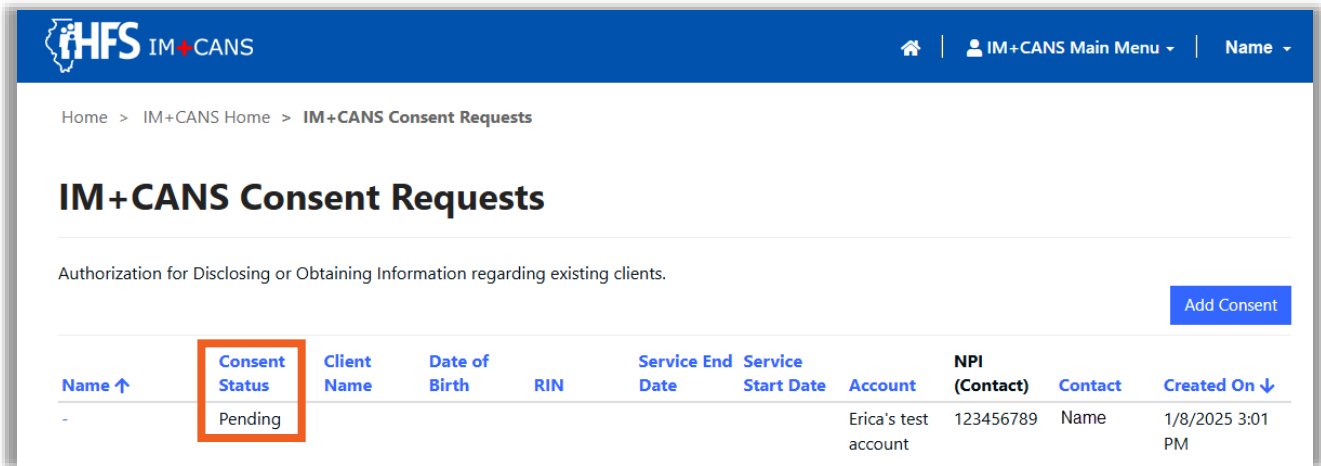


The screenshot shows the "CANS Consent Add Page" after a successful submission. The header and breadcrumb trail are the same as in the previous screenshot. The main heading is "CANS Consent Add Page". Below the heading is a green success message box that reads "Submission completed successfully." with a close button (X) on the right.

To check the status of your consent, you navigate to “IM+CANS Consent Requests” in the “IM+CANS Main Menu”.



The “Consent Status” column will show “Pending” until it has been reviewed. If your consent has no issues, you will see “Approved”. If there is an issue with the consent, you will see “Rejected”. Upon rejection, you will receive an email regarding the issue(s). If your consent is rejected, you will have to fix the issue(s) and upload it again.



Helpful Resources

- [IM+CAN Provider Portal Page](#)
- [IM+CANS Provider Portal Access](#)
- [IM+CANS & IM-CAT Training \(Provider Assistance & Training Hub\)](#)
- [IM+CANS Provider Portal Administrative User Request Form](#) to be submitted to OMI.CANSAccount@uillinois.edu
- [IM+CANS Consent Form \(Authorization to Disclose IM+CANS Information\)](#) to be submitted to OMI.CANSAccount@uillinois.edu

Helpful Contacts

- IM+CANS Assist Help Desk: OMI.CANSAccount@uillinois.edu
- Integrated Assessment and Treatment Planning (IATP) Assistance: HFS.IATP@illinois.gov
- IM+CANS Batch Import Assistance: HFS.CRM.Help@illinois.gov
- IM+CANS Training & Certification Questions: PATH-BH@illinois.edu