Chapter III CLIENT INFORMATION

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Assessment Client Activity Custom Screen 1 Roster by Client Waiting List Authorizations Referral	Add CG Caring for this Client
History Care Needs Custom Screen 2 Owners Income Src Income Crnnt Other Info	Caregiver Name Relationship of CG to CR
General Inteke Information	
Contact Date: 00/00/0000 Client / CR Age: 92 County : Is the Client Address Rural?	
Unique ID: AN0-01-80540 Caregiver Volunteer Status: Status Date: Region #	
Date of Birth: 06/22/1921 T Refused to Give DOB Active (Area Office)	
Title: Last Name: First Name: Middle Name: E Contact Name:	
E Contact Phone: (864) -	
Home Phone: (364) - E Cell Phone: () -	
Cell Phone C - E-mail Address E Relationship:	
Ee-mail	
Addess. Is Other the Mailing Address	
Aduz. Aduz.	Add CR Clients Being Cared For
	Client Name
State, SC Zip Code; State; J Zip Code, State; J	Relationship of CG to CR
- Employment Data	
Employer Info: Race: African American/Black Total Income: 00	
Occupation: Ethnicity Refused to give Income	
Status: Marital Status: Unknown 🔽 Total Expenses: 00	
Gender: Female Special Eligibility:	
Caseworker /	
CO Auvocate (Consent Release: Yes Yes # in Household	9
JOB Verification:	
Speaks Limited English Ph Lang.	

The **Client Info** screen provides **Quick Links** to other screens, such as the **Assessment**, **Roster**, and **Waiting List** screens. It also displays services received by the client.

PART A Entering Data for a NEW Client

IM Hoste	ed: User	is Acting as provider	: Re	mbert Area C	ommu
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		Activity Setup Roster by Activity Roster Service Entry			
		Info and Referral Employee			
		Merge Clients Assign Clients			
		Maintenance	•		

- 1. Click on the Screens menu item, then Client, then Client Info.
- 2. This will bring you to the **Client Quick Find** screen.
- 3. Double Click on any name to bring up the Client Screen.
- 4. In *AIM*, you must first pull up an existing client before you can add another client into the system.

X Client Quick Fi	nd				
Client ID	Last Name	First Name	Middle Name	Status	^
000-21-00334				Active	
000-21-00335				Active	
000-21-00337	ABRACADABRA	ABBIE		Active	
000-99-00484	ABRACADABRA	ABBY		Active	
000-99-00325	ABRACADABRA	ABNER		Active	
000-99-00488	ACROPOLIS	NANNIE		Active	
000-99-00037	AERPLAIN	JEFFERSON		Active	
000-00-00009	ALABAMA	ANNIE		Active	
000-99-00458	ALASKA	EANIE		Active	
000-99-00251	ALBERTA	DAISY		Active	
000-99-00128	AMAZON	ZENA		Active	
000-99-00463	AMERICA	JUJU		Active	~
Find: OK Show Active Clie	Cancel	-Type of Search	ne(Last,First) I		

NOTE: You are forced to select a client before you enter a new client so that (hopefully!) you will be encouraged to look over the existing clients, to make sure that the "new" client you are entering is not already in the system. The LGOA recommends that you make it a standard procedure to always check existing clients, before inserting new clients to avoid duplication.

AIM USER MANUAL

March 2013

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Saim.sabersite.com - Remote Desktop Connection		
AIM Hosted: User is Acting as provider: Lieutenant Governors Off	fice on Aging - [Unknown]	
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Close Sure Print Screen Report Insert Delete Rec Undo	Cet Copy Paste Quick Find Previous Next First Last	
Quick Link	eter by Client Waiting List Authorizations Beferral	Add CG Caring for this Client
History Care Needs Custom Screen 2	Owners Income Src Income Cmnt Other Info	Relationship of CG to CR
Contact Date: 00/00/0000 Client / CR Age: 92 Unique ID: AN0-01-80540 Caregiver Volunt. Date of Birth: 06/22/1921 Caregiver ODB	County : Is the Client Address Rural? eer Status: Active Status Date: Region # (Area Office)	
Title: Last Name: First Name: M Home Phone: (864) - Work Phone: (864) - Cell Phone: () - E-mail Address Physical Address: Is Physical the Mailing Address	tiddle Name: E Contact Name: E Contact Phone: (864) - E Cell Phone: () - E Relationship: 2 E e-mail E e-mail I Is Other the Mailing Address	
Add1: Add2: City: State: SC Zip Code:	Add1: Add2: City: State: Zip Code:	Add CB Clients Being Cared For Client Name Politiceschip of CC to CB
Employment Data Oth Employer Info: Occupation: Status: Caseworker / CG Advocate ODB \ Cost St	er Information	

- 5. Once you have any client's record on the screen, you can **click** the **Insert Icon** from the top menu (fifth icon from the left) to add a new client.
- 6. The **Client Search Screen** will be displayed. Type in a first and last name at a minimum. It is best to have all of the fields checked to widen a search. Notice "Jim" is listed in a street address.
- 7. If the correct client is listed, highlight the row and click **Make Owner**. (middle button at bottom of screen)

AIM USER MANUAL

March 2013

Search Results									×	
nter the search ter	m(s) in the search bo	x below. Click the se	arch button and the se	earch results will	appear in the list bek	ow.				_ 8
lim Smith							_			
Search										
iou can search on re: AND, OR, NOT ear/month combine heck the fields below Client ID	more than a single va the short hand versit ation by entering YYY ow you want to be in Actual SSN Address 2	alue, use (and) to gro on of AND is 8, the sh 'YAMM. A search exai cluded in the search. V Last Name V City	up your values togeth ort hand version of Of nple is: mark & (smith First Name County	er with the logic of R is J. Dates are of I smyth) & 1946/0 Middle Nam	operators that you w entered in the format 05 ne 🔽 Birth D	ant to use. yyyy/mm/c Date Phone	The k	ogic operators support ou can search for a onne Phone ontact Phone	Re	Caregiver Name Iationship of CG to CR
Client ID	Last Name	First Name	Street Ac	idress	Phone #	Gen	der		_	
AN00140610	Smith	Jim (guest)			() -	Male				
AN00039405	Smith	Steven	289 Jim Hunt Rd.		(864) 306-2511	Male				
ck the Generate I ck the Make Own	utton to create a new er button to become a	v client record.	pited record.						1 CB Re	Clients Being Cared F Client Name elationship of CG to CR
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8. If the correct client is not listed, click the Generate button at bottom of screen.

Effer the search territory in the search box below. Click the search botton and the search results will appear in the list below.	Search Results								×
Jum Smith SearCh We dea search more than a single value, use (and 10 grapp your values logding with the logic operators that you were to use. The logic operators supported were AND, CC, NOT the short heard version of CA is 1. Deales are entered in the romat yourwands to you can search for a performance that a single value, use (and 10 grapp your values logding with 3 194005 Check the fields below you were to use. The logic operators that you were to use. The logic operators supported were AND, CC, NOT the short heard version of CA is 1. Deale are entered in the romat yourwands to you can search for a performance to be included in the search. Check the fields below you were to use. The logic operators that you were to use. The logic operators supported Address 1 Address 2 Cardy Prior Name C Contract Phone Contract Phone Phone Contract Phone Phone Contract Phone Phone Contract Phone Phone Phone 9 Contract Phone Contract Phone Phone Contract Phone Phone 9 Contract Phone Contract Phone Phone 9 Contract Phone Phone 9 Contract Phone Phone 9 Contract Phone Phone 9 Contract Phone Contract Phone Phone 9 Contract Phone Phone	nter the search ter	m(s) in the search bo	x below. Click the set	arch button and the se	arch results will	appear in the list bel	low.		
Search Out can search Out can search Search Search Search Search Search Search Search Search Search Search Search Search	Jim Smith								
20/20 cmail selection 3000000000000000000000000000000000000	Search								
exeAAD_CR_NOT the short hand version of AND is 8, the short hand version of CR_IB_ID Exert Status Call Statu	ou can search on	more than a single val	ue, use (and) to gro	up your values togethe	er with the logic o	perators that you w	vant to use	a. The logic operators supported	I CG Caring for this Client
Care to be fields below you way to be included in the search. Middle Name Middle Name Middle Name Middle Name Middle Name Control to the Con	re: AND, OR, NOT	the short hand versio	n of AND is &, the she	ort hand version of OR	is . Dates are e	ntered in the format	yyyy/mm	/dd so you can search for a	Caregiver Name
Image: Second D Actual SSN Last Name Image: First Name Middle Name Image: First Name	beck the fields bel	ow you want to be inc	luded in the search.	ipiona. mark or (amari)	aniyariya ro40ia				Relationship of CO to CR
Image: Address 1 P. Address 2 Image: Clorent V Image: V Ima	Client ID	Actual SSN	🔽 Last Name	First Name	Middle Nam	e 🔽 Birth I	Date	✓ Home Phone	
Client ID Last Name Frist Name Street Address Phone # Oender AN00140010 jmith jmith jmith jmith jmith jmith jmith AN000039405 jmith jsteven j29 jm Hunt Rd. (i064) 306-2511 Male Status index index (i064) 306-2511 Male Status index index index Client Reing Cared Status index index index Client Name Relationship of CG to CR index index Client Name Status index index index index Status index index index	Address 1	Address 2	City	County	🔽 Zip Code	VVork	Phone	Contact Phone	
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		Gene	rate N	nake Owner	Cancel	1			

- 9. A new Client Screen will be displayed.
- 10. Enter the remaining information into the **Client Screen**. Most of the boxes need no explanation; however, some of the boxes need further emphasis:
 - a. **REQUIRED DOB**: This is a critical field, used to place the client in an age range for reporting purposes. Date of Birth MUST be entered. If



refused, attempt to obtain the year and enter as 07/01/YY. If

further refused, check Refused.

b. Status and Status Date: these refer to the overall eligibility status of the client, and do not relate to any particular service or assessment. Click on the Owners button to see the choices for Status.

Assessment	Client Activity	Custom Screen 1	Roster by Client
History	Care Needs	Custom Screen 2	Owners
General Intake Information ontact Date: 00/00/0000 Dat nique ID: AN0-01-78786 F ctual SSN: 260-00-0001	e of Birth: 02/26/1949 ▼ Age Caregiver Volunteer Status Client / CR Active	: County : YORK : Status Date:	I Rural Area Region # β (Area Office)
Hosted: User is Acting as provider: Columbia File: Locate Screen: Option: Window Ces: Sweet Prior Screen: Option: Window Ces: Sweet Prior Screen: Option: Window Ces: Sweet Prior Screen: Prior Screen: Data Ceneral Intake Informatic ontact Date: Opti2/4/20 Cast Catual SSN: - ANO 00-5 Cative Individual Intake Informatic exits: AND 00-5 Cative And Series: And Cative And Cative And Screen: Cative And Cative Screen: And And Cative Active Matter: SC Cative Active Active City: Columbia Cative Active Active City: Columbia Cative Active Active Status: Retired Screen: Active Active Status: Retired Screen: Active Active	Urban League - Dean Law Firm [Client - And the terms - Cost - C	erson, Alice]	Add CG Carregiver Name Relationship of CG to CR Clients Being Cared F Client Name ationship of CG to CR

The **Status** AND the **Status Date** are critical fields. They are used to pull clients for reporting. If the client's status is Closed, Deceased, Inactive, or Pending, the client will not be included in some reports and rosters.

For a new client, the **Status Date** for **Active** will be the effective date that the client was approved for services and **must** be entered manually. (Status Date defaults to the date the record is being inserted and is not usually the date the client became active.)

NOTE: The **Status Date** DOES NOT automatically change when you change a clients status, you must change the date manually.

• When a client's **Status** is **Closed**, **Status Date** is the date the client becomes ineligible for services (in other words, the date

the client is terminated).

- If a client is **Deceased**, **Status Date** should be the date of death or the date your agency learned of the client's death.
- If a client becomes ineligible for services, and there is reason to believe that this is only a temporary situation, the client's **Status** is **Inactive**, and the **Status Date** is the effective date of ineligibility for services.
- Information on a new client may be entered into *AIM* <u>before</u> the client is determined to be eligible for services. In that case, the client's **Status** is **Pending**, and the **Status Date** is the date that the preliminary information is entered into the system.
- If a client is entered onto a Waiting List, BUT NOT receiving any services, the client's **Status** is **Pending** and the **Status Date** is the date the client was put on the Waiting List.
- If a client is entered onto a Waiting List, BUT is currently receiving another service, the client's Status is Active and the Status Date would remain the date that the client became Active. (The Status Date would NOT change.)

- c. **Contact Information**: These fields relate to the client's address and phone numbers, as well as emergency contact information. **Check** the **Client Box** for Clients.
- d. REQUIRED County:

NOTE: County can be automatically entered with a ZIP. The **County** correspond to the County in which the client <u>resides</u>, regardless of the county where the client is receiving services.

If ZIP code is not known, click within the ZIP code field, and a search screen will appear. First put in a state, then a city. Click on the top right button that says Search City & State. If a city shows 2 counties, pick the correct one. It is possible for a city to encompass multiple counties.

Click on the Return Selected button in lower left for the correct county.

Zip Co	de:	Search Zp Code	36	Inch Citly & Ebate	
State: So Ak Ak An An	outh Carolina abana aoko seta teono teono	City I	r		
31020	County		City	Др Code	
Return	Selected			Cancel	

e. **Employment Data**: (Optional) If the client is employed, enter the employer's name and the employees's occupation.

- III-7

- f. **Click** on the drop-down arrow and select the appropriate Employment **Status** for the client.
- g. Other Information:

<u>REQUIRED</u> - Race and Ethnicity: Click on one selection from each list. If clinet refeuses, check Refused box.



 Employment 	Data
Employer Info	p:
Occupation	1:
Status	s: Retired
	Never Employed
CG Advocate	Now Employed
	Quit to be full-time Caregiver
Operator	Retired
	Seeking Employment
	Unknown
	Veteran



AoA Race/Ethnicity Definitions:

- African American, Not of Hispanic Origin -- A person having origins in any of the black racial groups of Africa.
- Hispanic Origin -- A person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race.
- American Indian or Alaskan Native -- A person having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.
- Asian American/Pacific Islander -- A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands, Samoa and the Hawaiian Islands.

• Non-Minority -- Any person who is not considered a minority. Source:

http://www.aoa.gov/prof/agingnet/NAPIS/SPR/SPR_guidance/definspr. asp

- - Marital Status: Click on selection from list.
 - Contact Date: This is the date of the agency's first contact with the client.
 This date should never change.

	C Other	Informat	tion —	
	Race:	2 or mo	re Races	*
	E	thnicity	Hispanic	~
9	Marital	Status:	Married	~
Contact Date:	10/22/1	992 it	Divorced	
	Concor	t Roloac	Married	
Consent Release:	Yes		Separated	
1	Vo	H	Single	
	/es	1	Unknown	
-			Widowed	

- **Consent Release**: This should default to "**No**" based on information in the Employee Defaults screen. If, at this time, you have a signed release from the client, click on the down-arrow and **click** on "**Yes**".
- <u>REQUIRED</u> Total Income: This is a display from another data-entry window; you cannot type in this box. (See Part B Quick Links below.)

📕 Total Incom	e: 635.00	
Total Expense	\$ 700.00	
Special Eligibility:	Spouse of Client 💌	
DOB Verification:	Driver's License 🛛 💌	
#in Household	2 📚	

- Total Expenses: (Optional) Enter the client's total MONTHLY expenses.
- **Special Eligibility**: IF client is under 60, but is eligible for Title III Services, enter the type of Special Eligibility under which the client qualifies for services. **Click** the drop-down

arrow to choose a selection from list.

Race: African American	•	Total Income: 00	
Ethnicity Non-Hispanic	-	Total Expenses: .0	0
Marital Status: Widowed	-	Special Eligibility:	
Gender: Female	-	DOB Verification:	Spouse of Client
Consent Release: Yes	-	# in Household 🗌	Volunteer
Cost Share %			Emergency
			Other
			None
			None Waiver
			None Waiver <=18 child

 <u>REQUIRED</u> – Gender: The client is either Male, Female or Refused.

- **DOB Verification**: Enter the method used to determine that a client's age. **Click** the drop-down arrow to choose a selection from list.
- <u>REQUIRED</u> # In Household:
 Double-Click inside the box and type in the number of people living

Tot	al Incom	ie: 635.00					
Total B	Expense	s: 700.00					
Special El	ligibility:	Spouse of Client 💌					
DOB Veri	fication:	Driver's License 💌					
# in Hou	usehold	Birth Certificate					
		Driver's License					
Program	Fundi	Marriage Certificate					
	United W	Verbai					
	United W	Vay 04 - Home Delly					

in the client's home (or use the up and down arrows to reach the number).

Client, self = 1 Client + 1 other = 2 Client + 2 others = 3 Etc...

Race: African American/Black	Total Income: 00	
Ethnicity	Refused to give Income	
Marital Status: Unknown	 Total Expenses: .00 	
Gender: Female	✓ Special Eligibility:	-
Consent Release: Yes	# in Household	
DOB Verification:	 Refused to give Number in Ho 	useholo
Cost Share % Speaks Limit	ted English Pri Lang:	

- h. Case Worker/CG Advocate: Select the Caseworker for this client from the drop-down list of employees.
- i. Operator: Select YOUR name (since you are entering the data into AIM) from the drop-down list of employees.

Case Worker:	Elaine, Benes	~
Operator:	Jerry, Seinfeld	~
	Elaine, Benes	
	Jerry, Seinfeld	
	Saber,Corporation Inc.	
		_

j. Save:

AIM Hos	ed: Us	ser is a	Acting as	provider:	Catawl	a Area A	gency o	n Aging (aregiver	- [Unkn	own]				
👷 Eile	Edit L	ocate	Screens	Options	Window	Help									
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PART B Quick Links from the Client Screen

The Quick Link Buttons can take you directly to other Data Entry Screens, related to the Client Screen currently open. Notice on different Client records that different button are in Normal Print, **Bold Print** or Grayed-Out (grayed-out).

If a button is	It means that
Grayed-Out (grayed-out)	The Button is not available.
	The Button is available, but NO
Normal Print	data currently exists for that
	Screen.
	The Button is available, AND
Bold Print	data currently exists for that
	Screen.

Assessment

The **Assessment** Button takes you to the client's **Primary Assessment** Screen.(See **Ch. V** (5) for how to enter a client's assessment.)

Client Activity

The **Client Activity** Button displays a screen showing the Service Units, for this client. You can view OR enter activity data for this.

Custom Screen

The **Custom Screen** Button gives a screen to create client fields for information not found in the Client Screen.

+**>>** Ⅲ-11

Roster by Client The **Roster by Client** Button pops up a window where 💥 Advanced Information Manager (AIM): User is Acting as provider: Your Average Council on Aging - [Client - ABR.. 👰 File Edit Locate Screens Options Window Help a × -1+ ፠ 副 8 2 嘼 +1 5 C <u>S</u> 4 14 Close Print Screen Report Delete Rec Undo Cut Copy Paste Quick Find First Last Save Insert Previous Next Quick Link Custom Scree Roster by Client Waiting List Referral Assessment **Client Activity** Authorizations **Care Needs** Other Info Care Giver **Care Receiver** Income Src Income Cmnt

you can add this client to, or remove this client from, one or more rosters. Using this button, you can add or remove the client from the Roster(s) at the time that you initially enter the client or when you go into the client's record to change the status. (See **Chapter VI** (6) for instructions on using the Client Roster).

Waiting List The Roster by Client Button pops up a window when

X Advanced Information Manager (AIM): User is Acting as provider:	Your Average	Council on Agin	ıg - [Client - Af	BR 🔳 🗖 🔀
👷 Eile Edit Locate Screens Options Window Help				- 8 ×
🕂 🔐 🥌 📴 🗌 🏠 🖍 🖟 Close Save Print Screen Report Insert Delete Rec Undo Cut Ca	opy Paste G	Auick Find Previous	► I Next First	► Last
Quick Link Client Activity Custom Screen Roster by Client Care Giver Care Receiver Care Needs	Waiting	J List Author Src Incom	izations	Referral
adding client to, or remove this client from, one or more Waiting Lists. You can add or remove this client from one or more Waiting Lists for services. (See Chapter VII (7) for instructions on using the Waiting List feature.)	Clicht Roster Mana Activity Highligh Activity NOT Hig Click OK to sav Activity Name HMS - SSB0 OctJune HMS - United Way Respite-Cost Share T-3B-CM-Lanar T-3B-CM-Lanar T-3B-CM-Lanar Find: DK	ger ted - Client will be ghlighted - Client w e your changes, of Activity is Owned By Your Average Council on Aging Your Average Council on Aging	on the Waiting Li rill NOT be on the therwise changes Activity Group Description	St. Waiting List. Will be discarded. Program Group Description

The **Authorizations, Referral, Care Giver, and Care Receiver** Screens are used by Regional Family Caregiver Advocates. If agency is not part of Family Caregiver Advocate program, do not use these buttons.

Care Needs The **Care Needs** Button takes you to the **Care Needs** screen.

This is where you may choose to enter case notes by date for this client.

Income Src The **Income Source** Button pops up a Window to enter MONTHLY income for this client.

×	Adva	ince	d Infor	mation N	lanager	(AIM):	User is A	cting	as provider	: You	ur Averaș	ge Counc	il on Agi	ng - [Cli	ent - JO)P 📘		
9	Eile	Edit	Locate	Screens	Options	Window	/ <u>H</u> elp										-	ч Ч
1	[] +			6	2	-	2	5	*		C	Q	•	•				
	Close		Save F	Print Screen	Report	Insert	Delete Rec	Undo	Cut	Сору	Paste	Quick Find	Previous	Next	First	Last		
-0	Quick	Link ssessr	ment	Clier	t Activity	Cu	stom Scre	en	Roster by C	lient	Waitir	na List	Autho	rizations		Referral	_	1
		Care G	iver	Care	Receiver		Care Need:	5			Incom	e Src	Incor	ne Cmnt		Other Info		

Use the following rules to determine what amount(s) to enter in this <u>REQUIRED</u> window:

• If the Client's Income is KNOWN:

Enter the TOTAL MONTHLY income the client receives, either itemized by each of the sources listed or totaled in "Other Income", which ever works best for your agency. An "educated" estimated income is also acceptable. Then Click OK.



If the Client's Income is UNKNOWN and an "educated"estimate is not feasible:

Then you should refer to the most current HHS Poverty Guidelines. You will ask the client for the "Household Size" (number in the household) and then ask if they are equal to or below the corresponding income figure. If YES, enter that dollar figure. If NO, and they are above that figure, enter \$9999 as their income. If they still refuse, check Refused.

► III-13

NOTE: You **MUST** click on Income Source AND click OK, even if you do not plan to enter information: Income reports will not be correct, unless OK has been clicked from this window for EVERY client. It is a peculiarity of the *AIM* system.

Helpful TIP: You can tell whether or not the Income Source window has been "OK'd" by whether or not the BUTTON is in **Bold Print**: If "**Income Src**" is **Bold**, then it has been "OK'd". If "Income Src" is NOT Bold, then it has NOT been "OK'd".



The **Income Comnt** Button pops up a text window to type notes.

History: The **History** Button pops up a Window to show what client data fields contained before the last update.

Assessm	ent	Client Activity	Custom Scr	Roster by Client		
Histor	·	Care <u>N</u> eeds	Custom Scr	Owners		
General Intake Info	mation					
Contact Date: 00/	00/0000 Date of Birth	n: 02/26/1949	Age: Count	y: YORK	🔽 Rural Area	
Jnique ID: ANO	01-78786 🔽 Caregive	r 🔽 Volunteer	Status:	Status Date:	Region # B	
Actual SSN: D60-00	0001 Client / 0	CR I	Active		(Area Office)	

March	201	3
inal off	201	-

isated: User is Acting as provider: Columba Area Agency on Aging Caregiver Sit: Locate Screens Colons Window Help 1 🏙 👜 🚟 < 🏡 🗳 of 🕃 Di Africa A b Hel Mil	
(at Loant Sprens Sprens What he be	
en Son PrintSonan Report locut DubinRic Ubdo. On Copy Purts Weld/Find Province Nuit First Lost	
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▲ 2/2//.012.09.06.09 updated Catavba	a Area Agenc SCREGION3
Seneral latake Information Peter Make Informa	a Area Agenc SCREGION3 Actual Ssn: 28000000
aue cale - concord - part of carebier - Volunteer Status: Status Date: Region # - 2227/2012 09:05:40 updated Catavba	a Area Agenc SCREGION3 Last Name: Test
ual SSN: 00000000 🖓 Client / CR Active (Area Office) ^P 2/27/2012 09:05:39 updated Catawba	a Area Agenc SCREGION3 First Name: Paula
ndividual Intake Information E Contact Name: 2/2//2012 09 04 21 updated Cataviba	Area Agenc SCREGION3
Last Name: First Name: Middle Name: E Contact Phone: () - 207/2012 09:04:19 Updated Cataveba	Area Agenc SCREGIONS Model Name:
me Phone () - E Cell Phone () - 2007/012/09/03-52 updated Catavor	Area Agenc SCREGION3 Address1: Djijisdji
al Phone: () · E-mail Address E-e-mail	a Area Agenc SCREGION3 Address2: Sdfasdfa
vical Address: Is Physical the Mailing Address Other Address: Vis Other the Mailing Address 2027/2012.09:03:43 updated Catavba	Area Agenc SCREGION3 City: Back Hill
dt: Diflodif Addt: PO Box 207/2012 09 03 19 updated Catavba	Area Agenc SCREGION3
Add2 Add1 2272012.09.03.10 updated Catawba	Area Agenc SCREGION3 State: SC
AR. SC Zip Code 29730 State: SC Zip Code 29730 20000001 1145 00 updated Linetaen	a Area Agenc SCHEGUN3 Zip Code: 29730
Evelowed Data Other Monstein	County: York
imployer Info	Data 01/1020
Occupation. Ethnicity Non-Hispanic Total Expenses 00	000.544/1530
Status Retired Mantal Status Widowed Special Eligibility	Sex: Female
Adrocate	Marital Status: Widowed
	Race Code. African American
	Hispanic: false
	Isclient: true
1) (

For Technical Support Call (888) 373-2090

AIM USER MANUAL

Link to Caregiver:

Waiting List		Authorizations		Referral		Add CG	Caring for this Client
Income Src		Income Cmnt		Other Info		Caregiver N Relationship of	lame CG to CR
<mark>¥ select people th</mark> Highlight µ when finis	hat are caring for Deople that shed to say	Test, Paula. are caring /e your sele	for Test, Pa ection.	aula. Clic	k OK		
Client ID	Last Name	First Name	Middle Name	Status	Date of B		
cgU-UU-2892	labor	Julia		Active	10/30/1932		
jcgU-UU-2491	Talley	Danny		Active	8/28/1955		
cg0-00-2770	Tatman	Beth		Active	6/21/1949		
AN0-01-54006	Taylor	Debra		Active	4/29/1963		
cg0-00-2726	Taylor	ho	<u> </u>	Active	12/1/1931		
AND-01-53928	Templeton	Anna		Active	3/4/1937		
cg0-00-2405	Terry	Perrie	Michelle	Active	7/19/1962		
AN0-01-78786	Test	Velma		Active	2/26/1949		
AN0-01-73588	Teuton	Dorothy	<u> </u>	Active	2/1/1931		
•							
Find: Test,Velma					Add CR Client Na Relationship of	Clients Being Cared For me CG to CR	

Link to Care Receiver:

	Roster by Client		<u>₩</u> aiting List		Authorizations		Beferral	Add CG	Caring for this Client
	Owners		Income Src		Income Cmnt		Other Info	Caregiver Name Relationship of CG to CR	
91 	Select Clients for Highlight (Click OK	r that are being o Clients for when finish	that are bein that to save	Ima. ng cared fo your selec	or by Test, ' tion.	Velma.			
e: [AND-01-38808	Test	Paula	Middle Marrie	Active	9/4/1950			
e: II	cg0-01-2891	Testa	Michael		Active	11/1/1936			
e: li	AN0-01-73590	Teuton	Robert		Active	10/15/1930			
<u>p. </u>	AN0-01-53714	Tevebaugh	Ruby		Active	10/22/1926			
r the	AN0-01-60980	Thomas	Carol	L.	Active	9/27/1932			
	AN0-01-53454	Thomas	Doris		Active	3/7/1927			
-	AN0-01-54044	Thomas	Edna		Active	1/9/1936			
	cg0-01-2892	Thomas	Naquone		Active	1/8/1993			
de:	cg0-01-2894	Thomas	Raymond		Active	2/13/1926			
00 s: 1	Find: Test,Paula		Type of Searce	:h me(Last,First)		<u>></u>			
lity:	<u>0</u> K	<u><u>C</u>ancel</u>	C Client SS	NI.				Add CR	Clients Being Cared For
ion: J [Client Na Relationship of	ime CG to CR

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Information Required for Federal NAPIS/SRT Report:

Client Screen

Date of Birth Gender Zip Code Ethnicity Race # in Household Income

Assessment Screen

ADL's IADL's

Information Required for Caregiver Federal NAPIS/SRT Report:

Client Screen

Date of Birth Gender Zip Code Ethnicity Race Special Eligibility (Care Receiver Client Screen) Income # in Household

Care Receiver link to Caregiver

Relationship

EFFECTIVE DATE: March 1, 2013

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