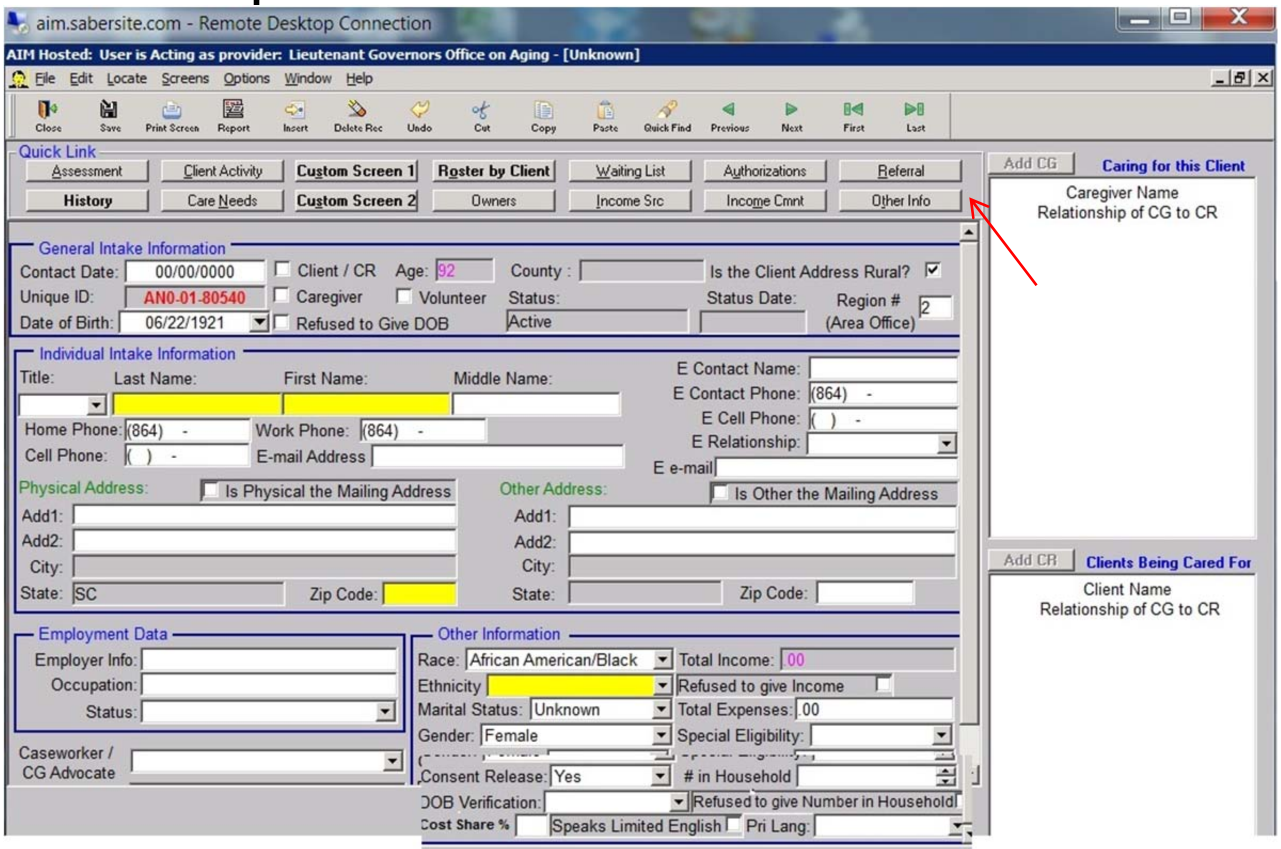
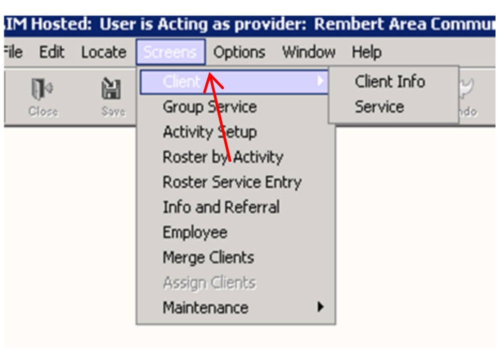
Chapter III **CLIENT INFORMATION**

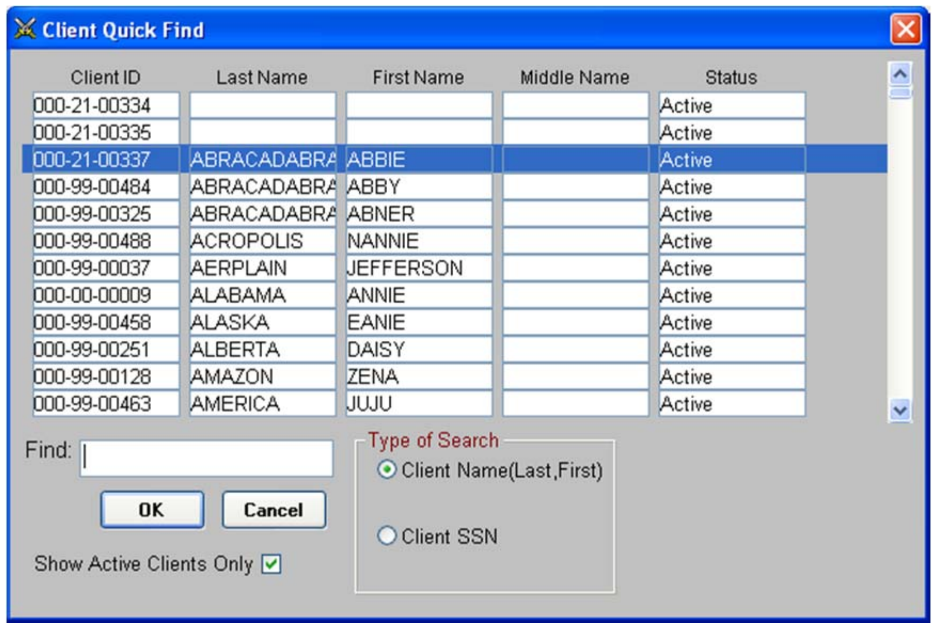


The **Client Info** screen provides **Quick Links** to other screens, such as the **Assessment**, **Roster**, and **Waiting List** screens. It also displays services received by the client.

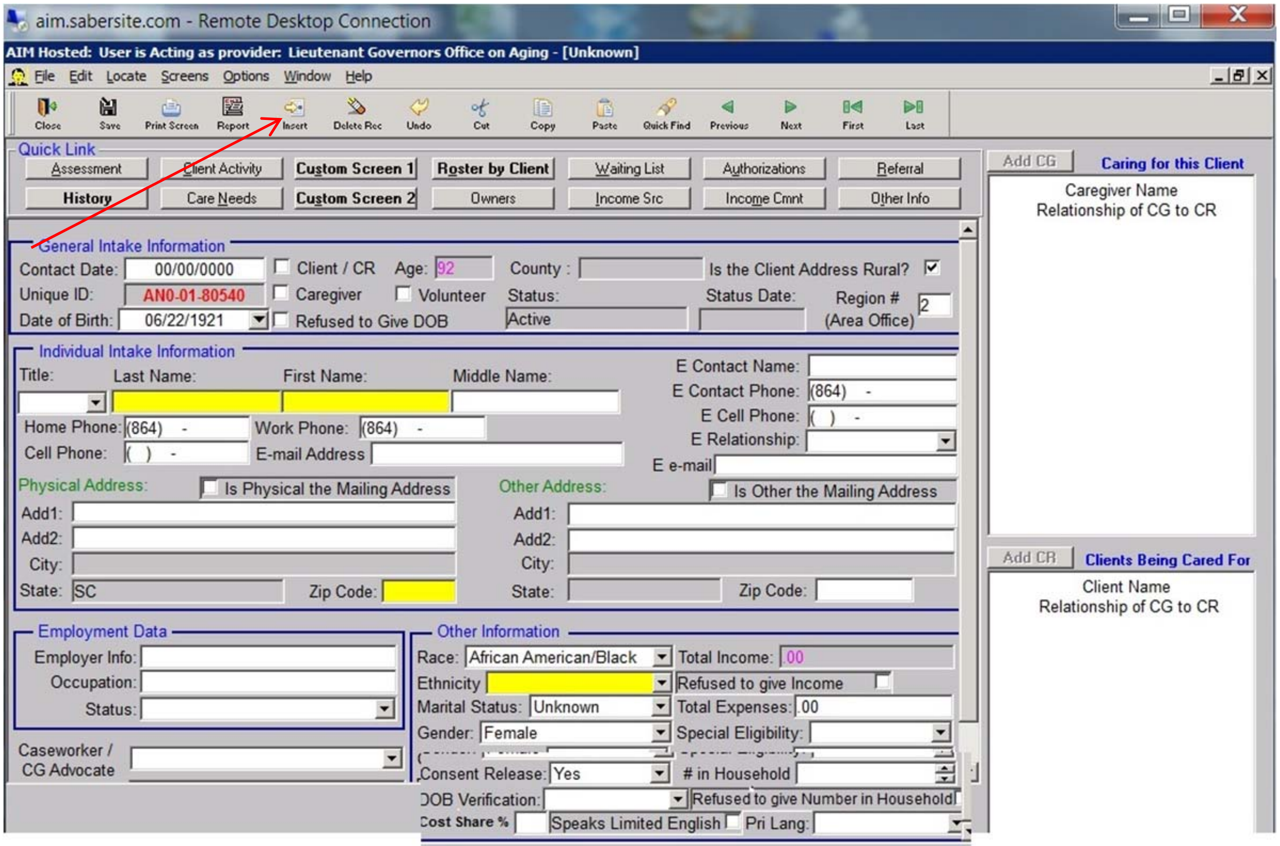
PART A Entering Data for a NEW Client



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.

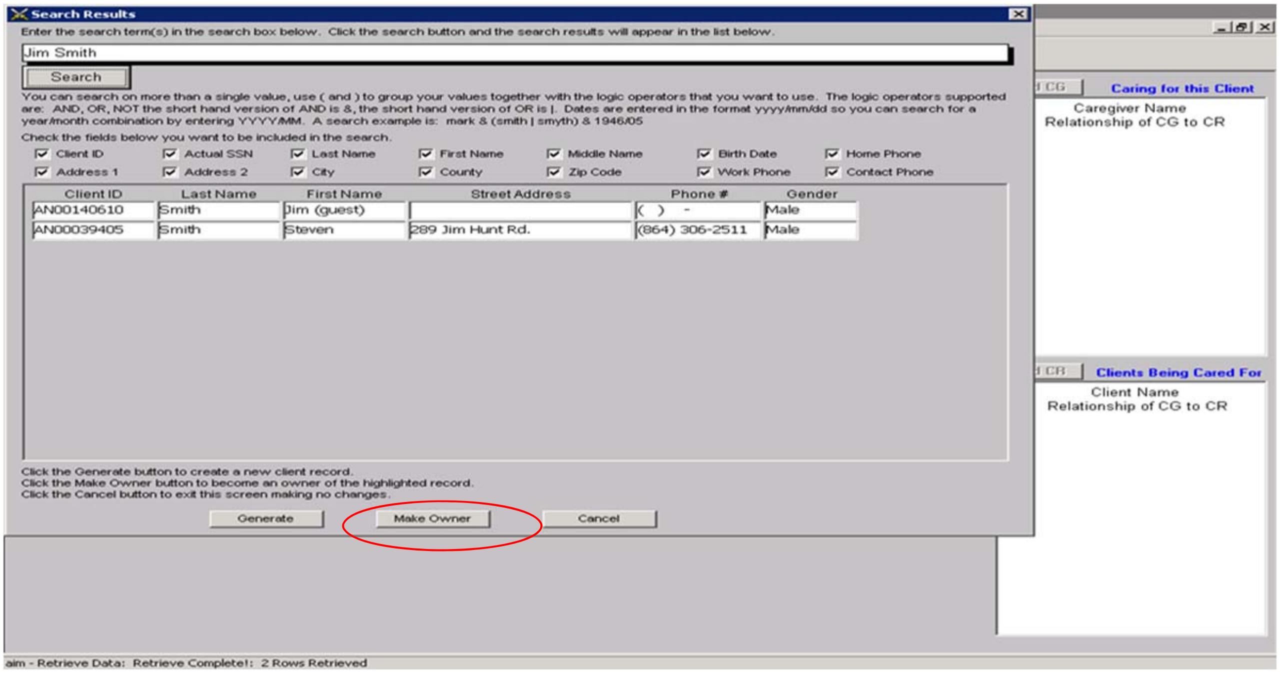


NOTE: You are forced to select a client before you enter a new client so that (hopefully!) you will be encouraged to look over the existing clients, to make sure that the “new” client you are entering is not already in the system. The LGOA recommends that you make it a standard procedure to always check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

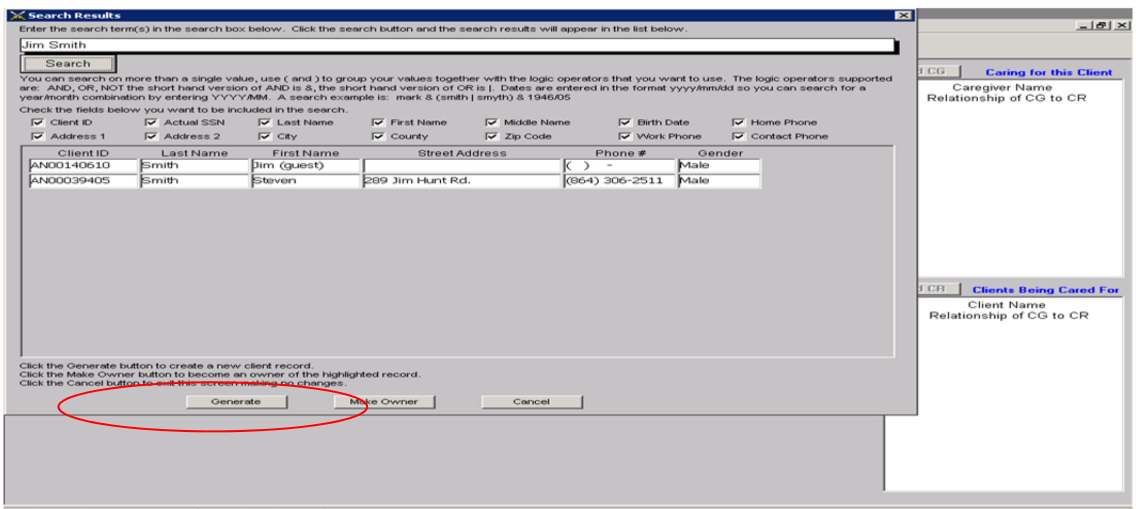


5. Once you have any client's record on the screen, you can **click** the **Insert Icon** from the top menu (fifth icon from the left) to add a new client.
6. The **Client Search Screen** will be displayed. Type in a first and last name at a minimum. It is best to have all of the fields checked to widen 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)**



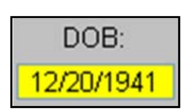
8. If the correct client is not listed, click the **Generate** button at bottom of screen.



9. A new **Client Screen** will be displayed.

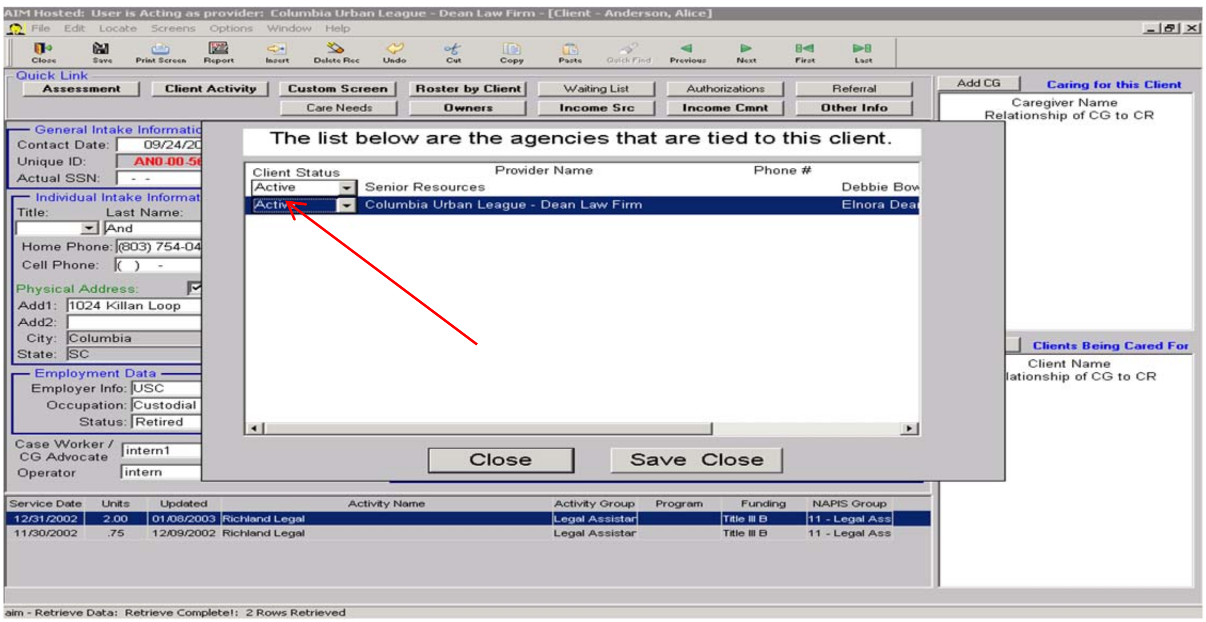
10. Enter the remaining information into the **Client Screen**. Most of the boxes need no explanation; however, some of the boxes need further emphasis:

    a. **<u>REQUIRED</u> - 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**.



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.)

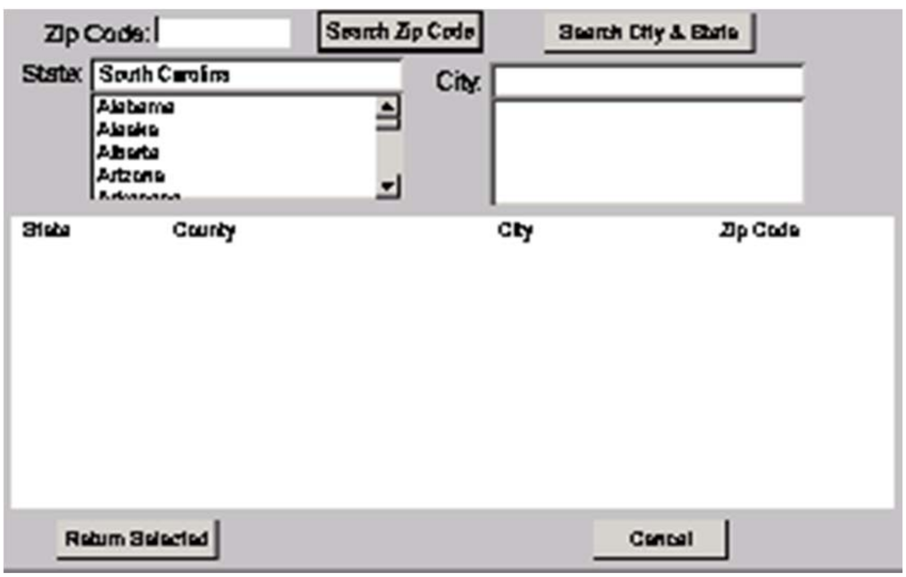
c. **Contact Information**: These fields relate to the client's address and phone numbers, as well as emergency contact information. **Check** the **Client Box** for Clients.

d. **<u>REQUIRED</u> - County**:

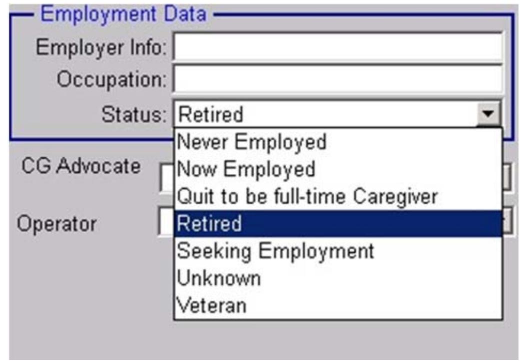
> **NOTE: County** can be automatically entered with a ZIP. The **County** correspond to the County in which the client <u>resides</u>, regardless of the county where the client is receiving services.

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.



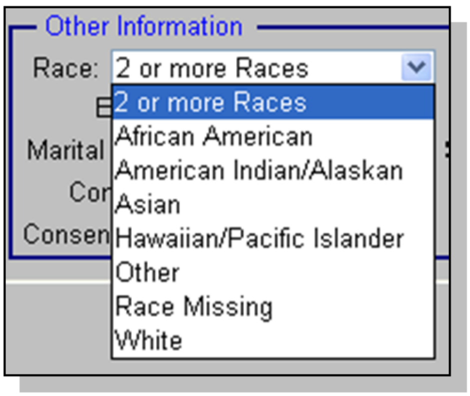
e. **Employment Data**: (Optional) If the client is employed, enter the employer's name and the employees's occupation.

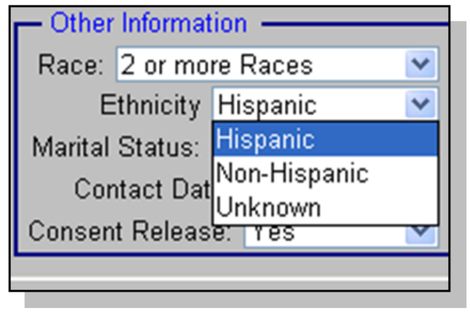


f. **Click** on the drop-down arrow and select the appropriate Employment **Status** for the client.

g. **Other Information:**

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



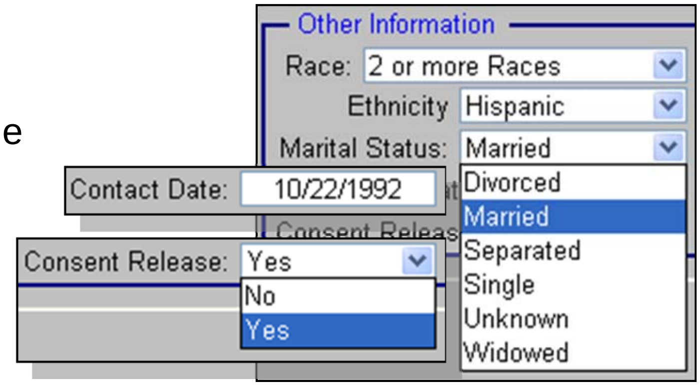


AoA Race/Ethnicity Definitions:

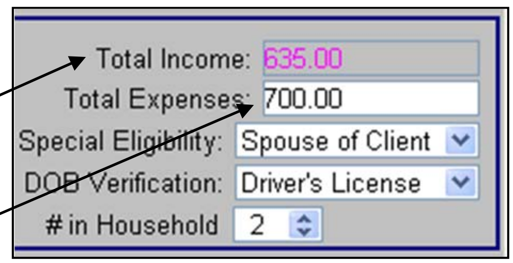
- African American, Not of Hispanic Origin -- A person having origins in any of the black racial groups of Africa.
- Hispanic Origin -- A person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race.
- American Indian or Alaskan Native -- A 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

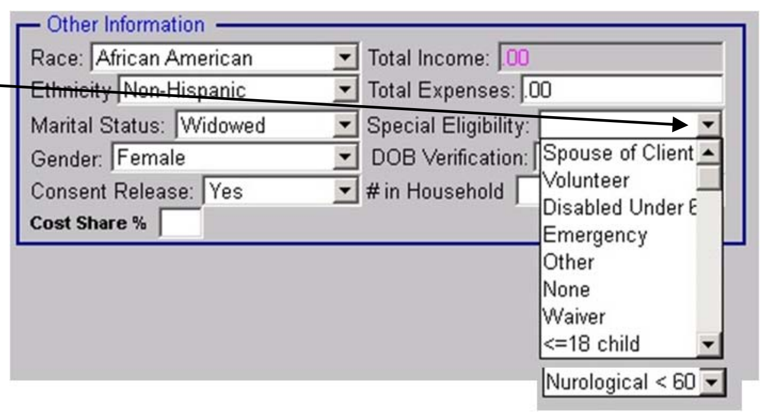
- **Marital Status**: **Click** on selection from list.



- **Contact Date**: This is the date of the agency's first contact with the client. **This date should never change**.
- **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.)

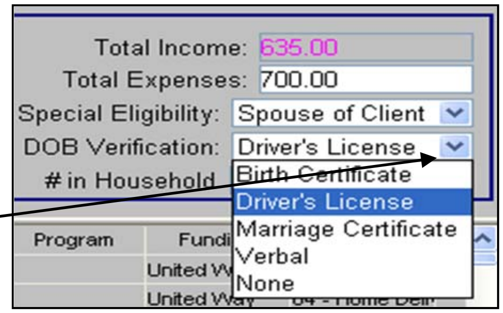


- **Total Expenses**: (Optional) Enter the client's total MONTHLY expenses.
- **Special Eligibility**: IF client is under 60, but is eligible for Title III Services, enter the type of Special Eligibility under which the client qualifies for services. **Click** the drop-down arrow to choose a selection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



- **<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.



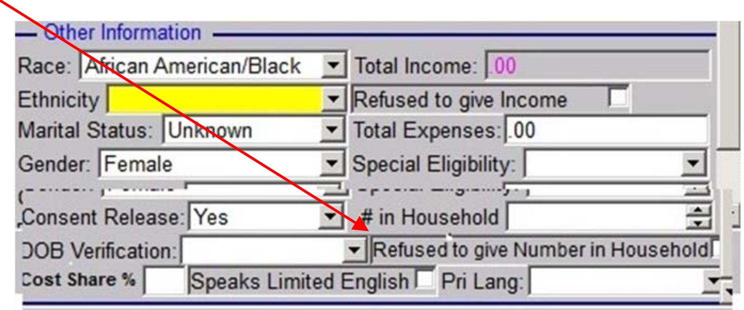
- **<u>REQUIRED</u> - # In Household**: **Double-Click** inside the box and type in the number of people living in the client's home (or use the up and down arrows to reach the number).

Client, self = 1

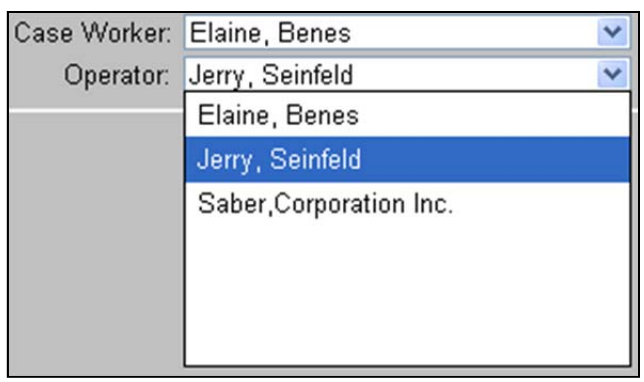
Client + 1 other = 2

Client + 2 others = 3

Etc…

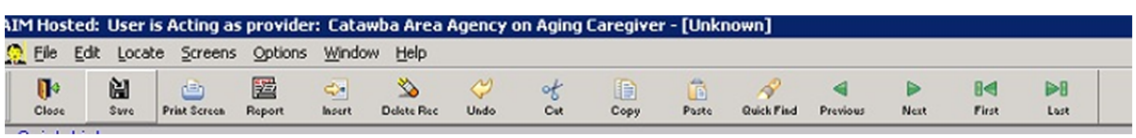


h. **Case Worker/CG Advocate**: **Select** the Caseworker for this client from the drop-down list of employees.

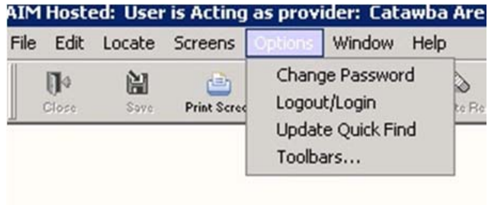


i. **Operator**: **Select** YOUR name (since you are entering the data into ***AIM***) from the drop-down list of employees.

j. **Save**:



k. **Update Quick Find**:



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.
Normal Print	The Button is available, but NO data currently exists for that Screen.
Bold Print	The Button is available, AND data currently exists for that Screen.

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

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

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

The **Roster by Client** Button pops up a window where

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).

The **Roster by Client** Button pops up a window when

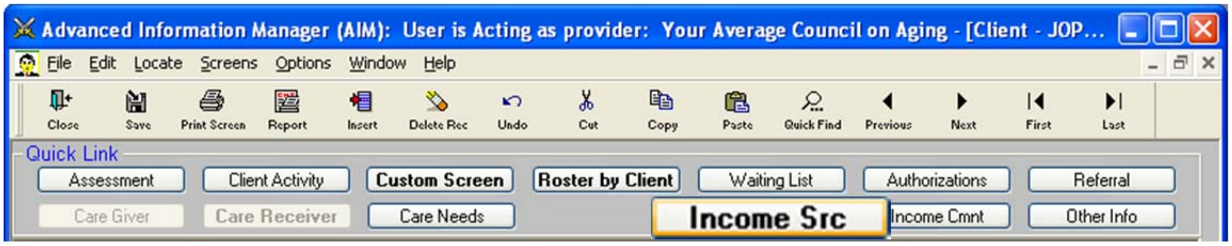
adding client to, or remove this client from, one or more Waiting Lists. You can add or remove this client from one or more Waiting Lists for services. (See **Chapter VII** (7) for instructions on using the Waiting List feature.)

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.

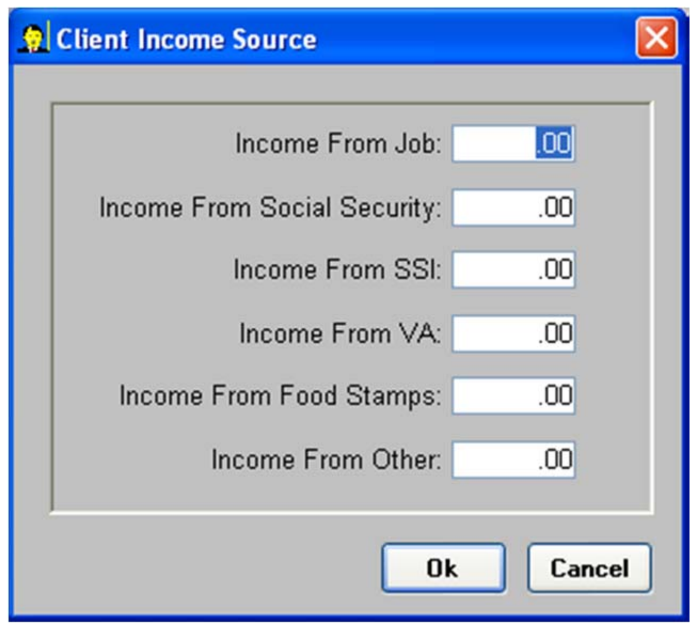
The **Care Needs** Button takes you to the **Care Needs** screen.

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

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



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



- **If the Client's Income is KNOWN:**

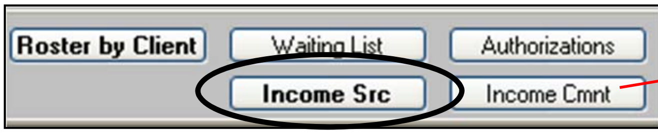
  Enter the **TOTAL MONTHLY** income the client receives, either itemized by each of the sources listed or totaled in "**Other Income**", which ever works best for your agency. An "educated" estimated income is also acceptable. Then **Click OK**.

- **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.

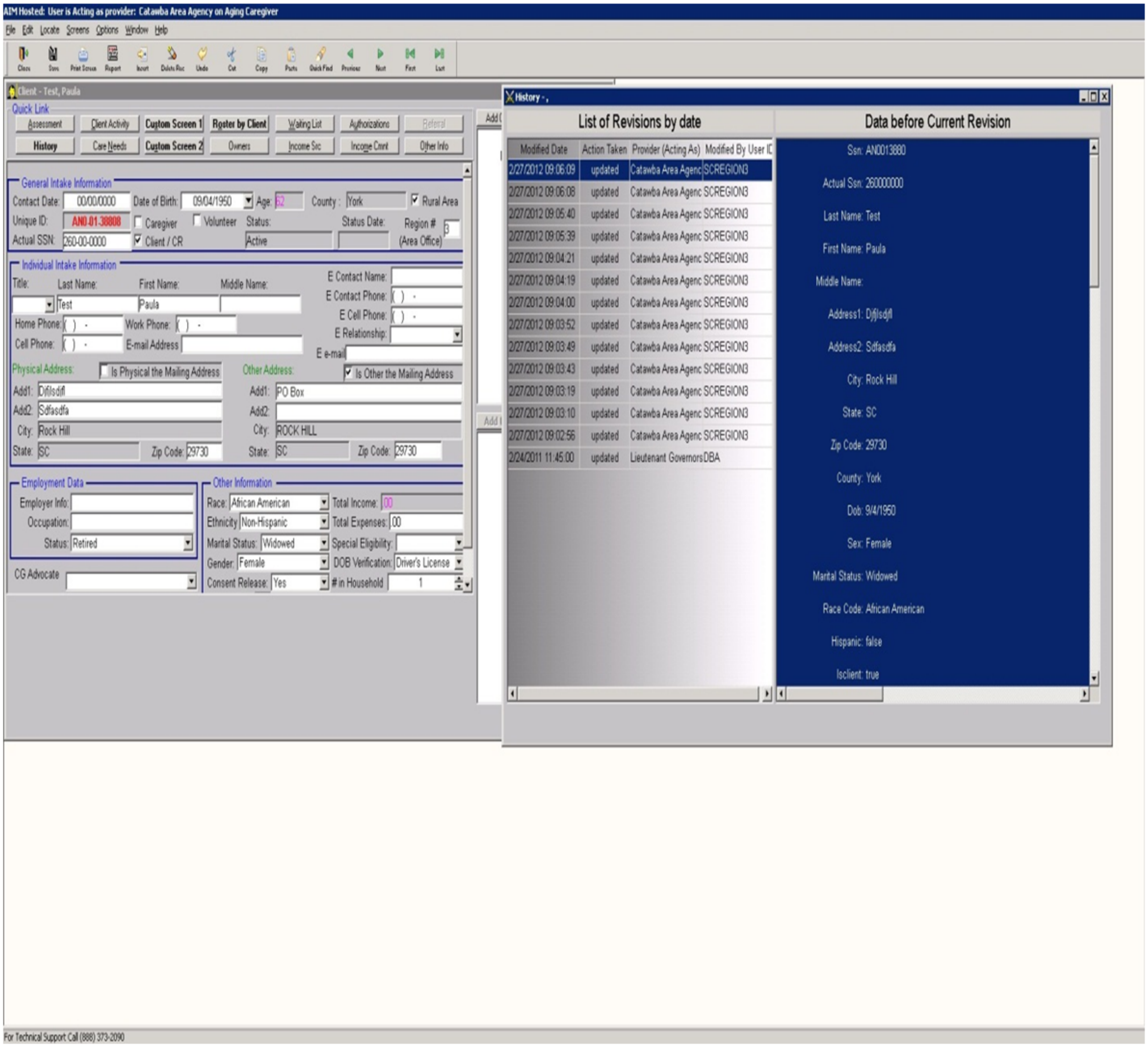
NOTE: You **MUST** click on Income Source AND click OK, even if you do not plan to enter information: Income reports will not be correct, unless OK has been clicked from this window for EVERY client. It is a peculiarity of the ***AIM*** system.

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".

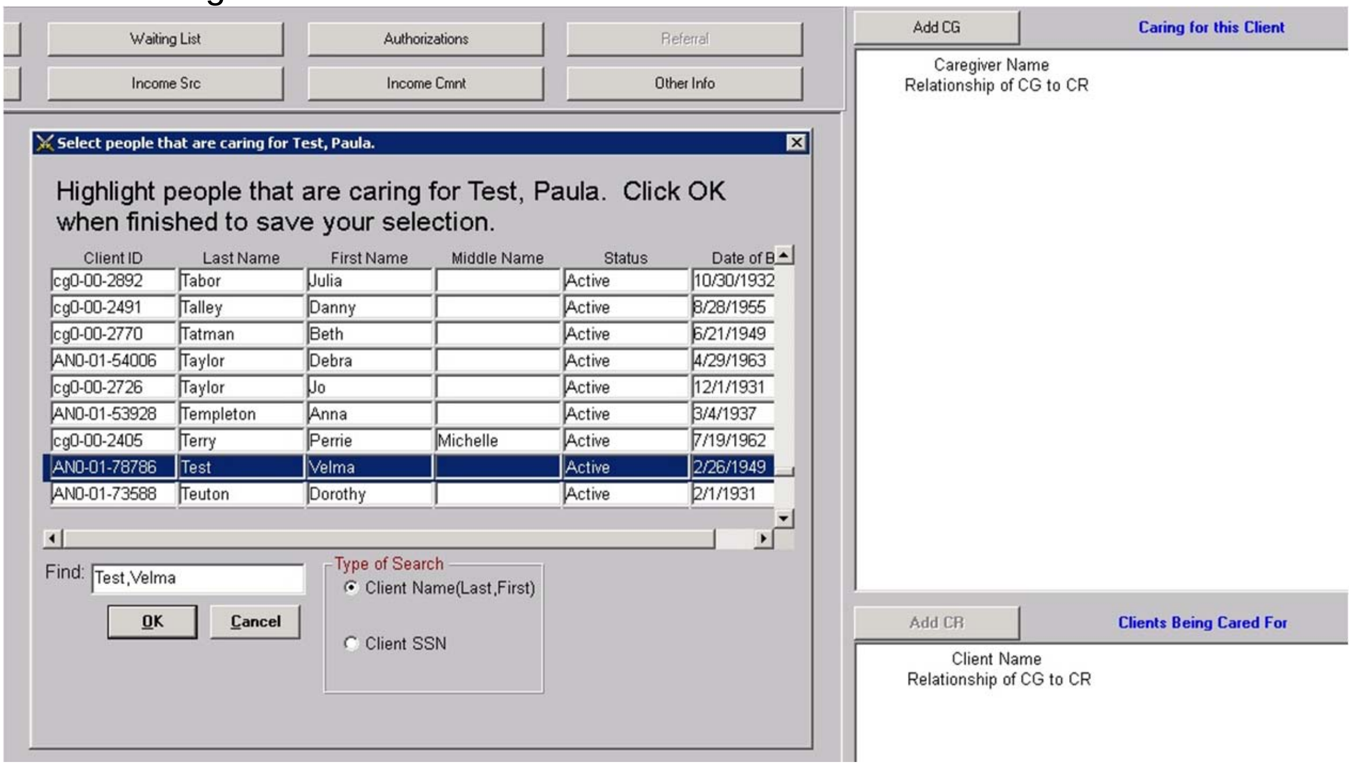


The **Income Comnt** Button pops up a text window to type notes.

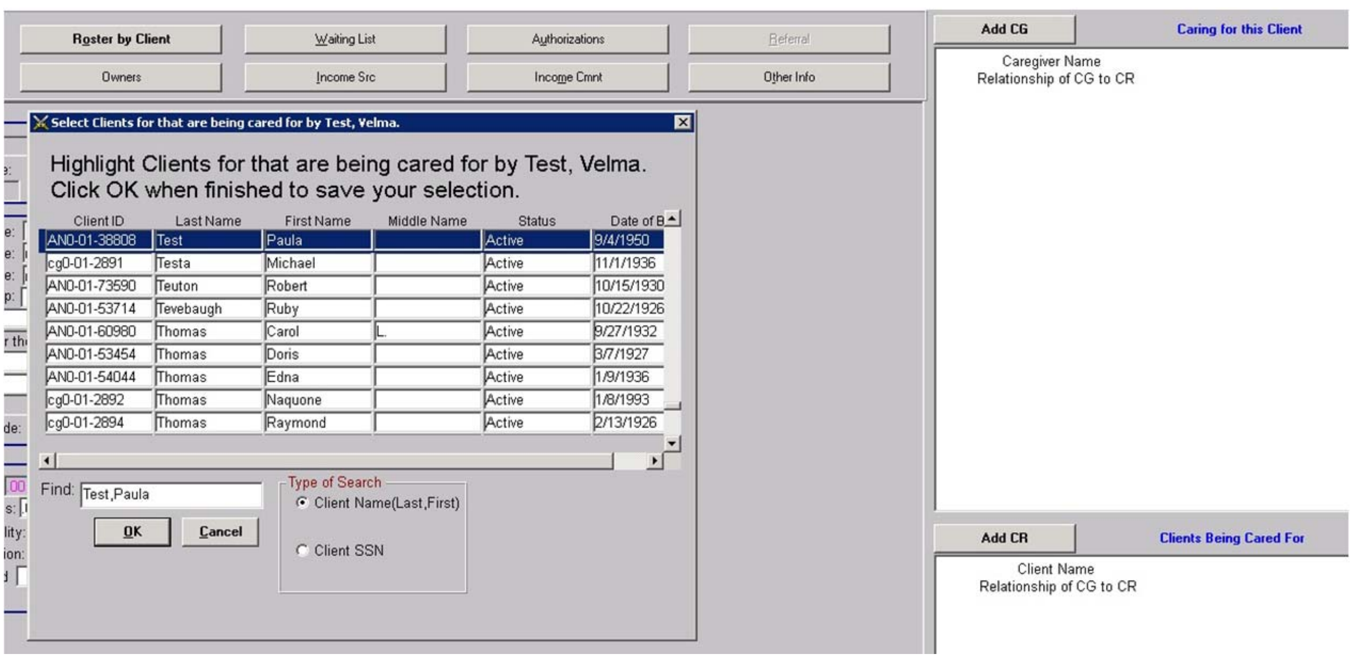
History: The **History** Button pops up a Window to show what client data fields contained before the last update.



Link to Caregiver:



Link to Care Receiver:



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