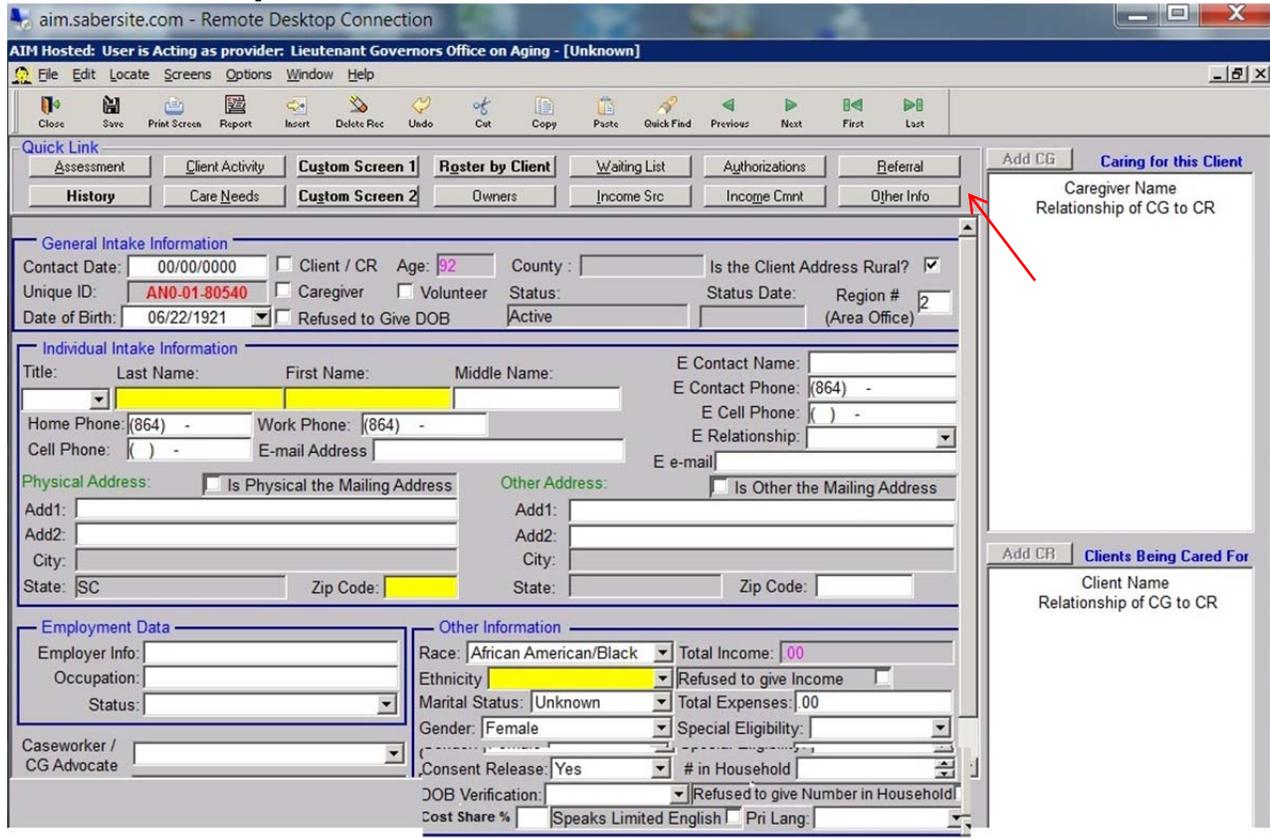


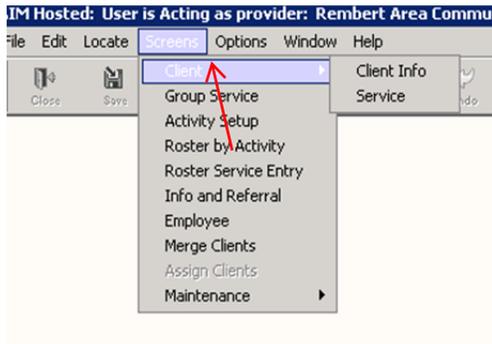


Chapter III CLIENT INFORMATION



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.

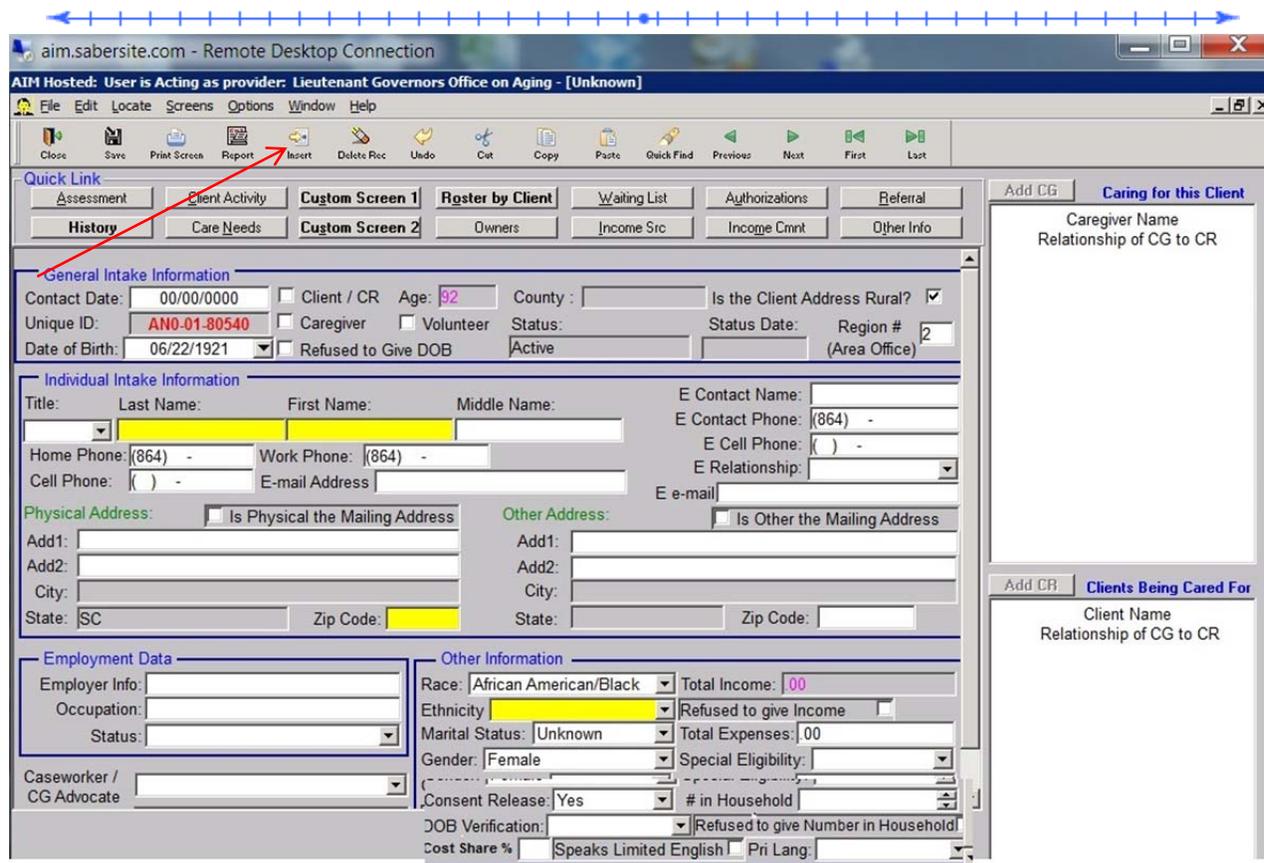
3. **Double Click** on any name to bring up the **Client Screen**.

4. In **AIM**, you must first pull up an existing client before you can add another client into the system.

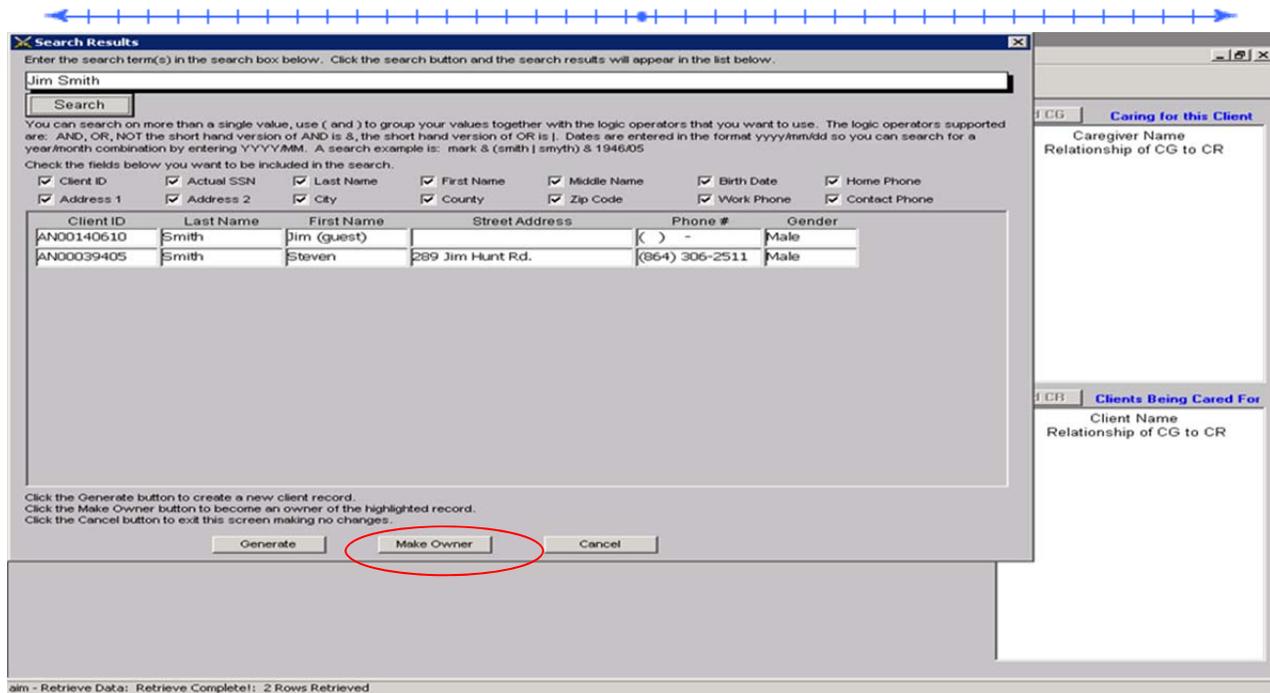
The screenshot shows the 'Client Quick Find' window with a table of clients. The table has columns for Client ID, Last Name, First Name, Middle Name, and Status. The client 'ABRACADABRA ABBIE' is highlighted in blue. Below the table is a search area with a 'Find:' text box, 'OK' and 'Cancel' buttons, and a 'Type of Search' section with radio buttons for 'Client Name(Last,First)' (selected) and 'Client SSN'. A 'Show Active Clients Only' checkbox is checked.

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

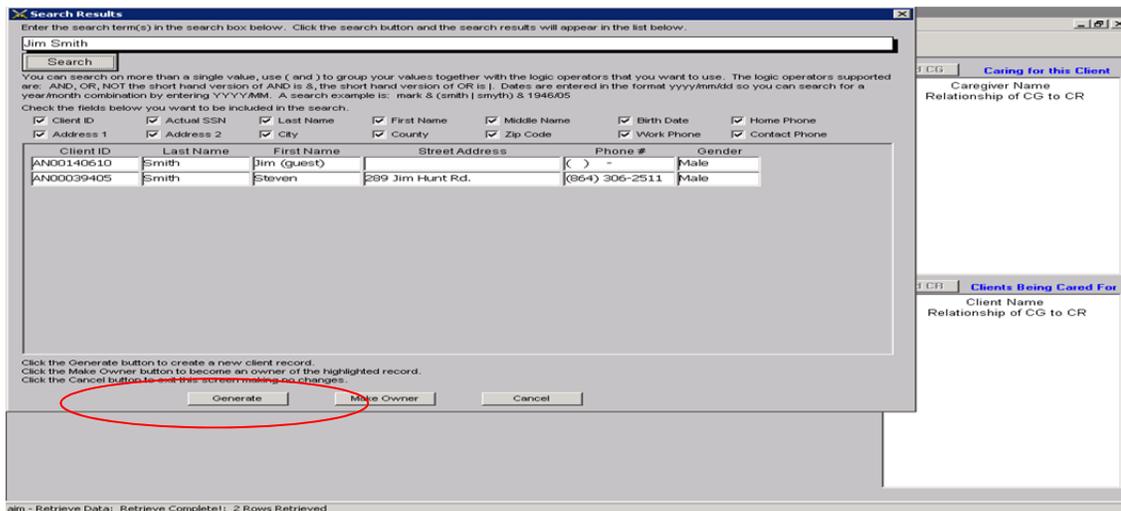
NOTE: You are forced to select a client before you enter a new client so that (hopefully!) you will be encouraged to look over the existing clients, to make sure that the “new” client you are entering is not already in the system. The LGOA recommends that you make it a standard procedure to always check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



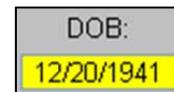
8. If the correct client is not listed, click the **Generate** button at bottom of screen.



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. **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**.

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** before 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 resides, 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.

The screenshot shows a search interface with the following elements:

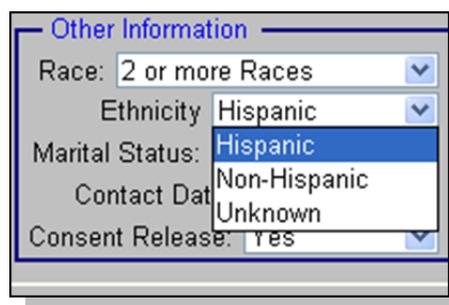
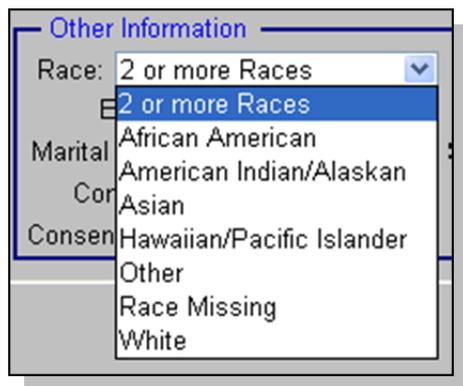
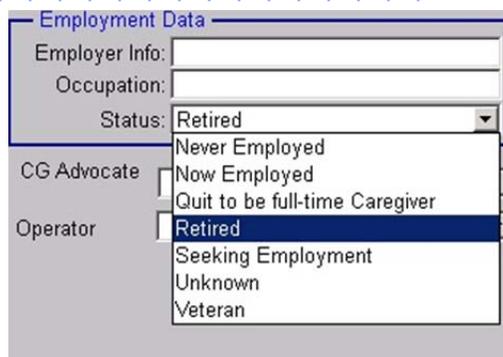
- Zip Code:** An input field with a "Search Zip Code" button to its right.
- State:** A dropdown menu currently showing "South Carolina". The dropdown list includes "Alabama", "Alaska", "Arizona", and "Arkansas".
- City:** An input field with a "Search City & State" button to its right.
- Table:** A table with four columns: "State", "County", "City", and "Zip Code". The table is currently empty.
- Buttons:** "Return Selected" (bottom left) and "Cancel" (bottom right).

- 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:**

- **REQUIRED - Race and Ethnicity:** Click on one selection from each list. If client refuses, 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.**

Other Information

Race: 2 or more Races

Ethnicity: Hispanic

Marital Status: Married

Consent Release: Yes

Contact Date: 10/22/1992

Marital Status dropdown list: Divorced, Married, Separated, Single, 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”.

- **REQUIRED - Total Income:** This is a display from another data-entry window; you cannot type in this box. (See **Part B Quick Links** below.)

Total Income: 635.00

Total Expenses: 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.

Other Information

Race: African American

Ethnicity: Non-Hispanic

Marital Status: Widowed

Gender: Female

Consent Release: Yes

Cost Share %

Total Income: .00

Total Expenses: .00

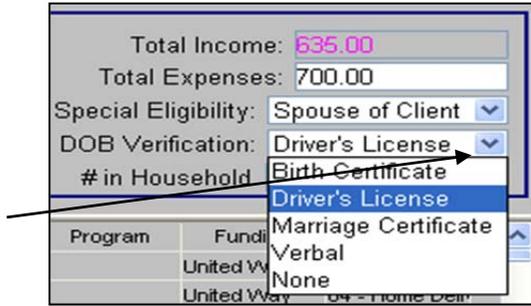
Special Eligibility dropdown list: Spouse of Client, Volunteer, Disabled Under E, Emergency, Other, None, Waiver, <=18 child, Neurological < 60

- **REQUIRED – Gender:** The client is either Male, Female or Refused.

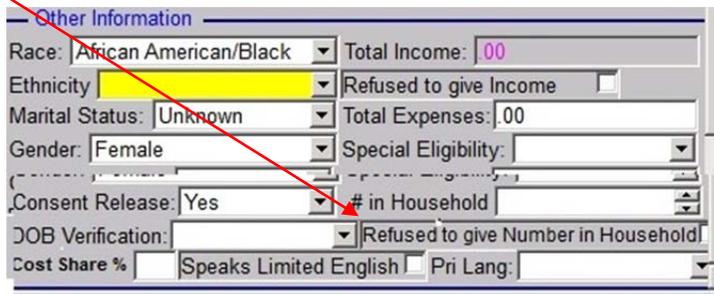




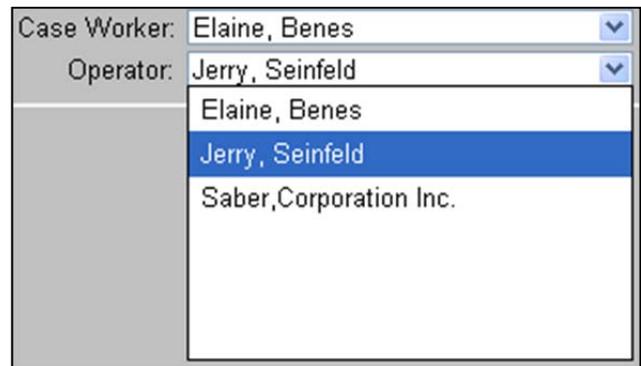
- **DOB Verification:** Enter the method used to determine that a client's age. **Click** the drop-down arrow to choose a selection from list.
- **REQUIRED - # In Household:** **Double-Click** inside the box and type in the number of people living in the client's home (or use the up and down arrows to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

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.

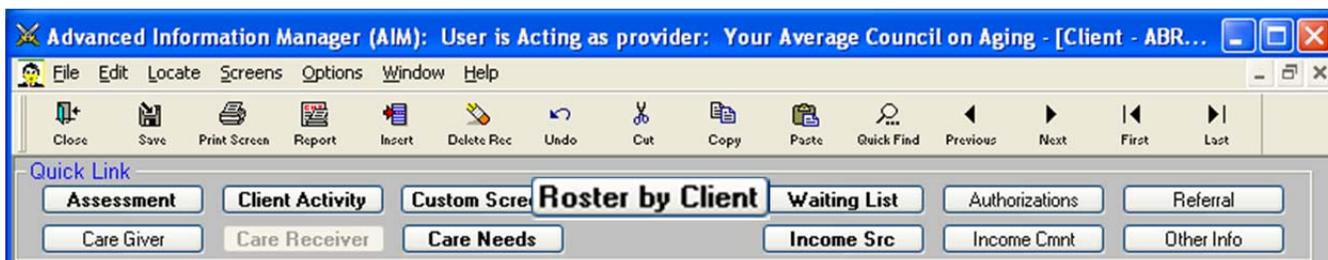
Custom Screen

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



Roster by Client

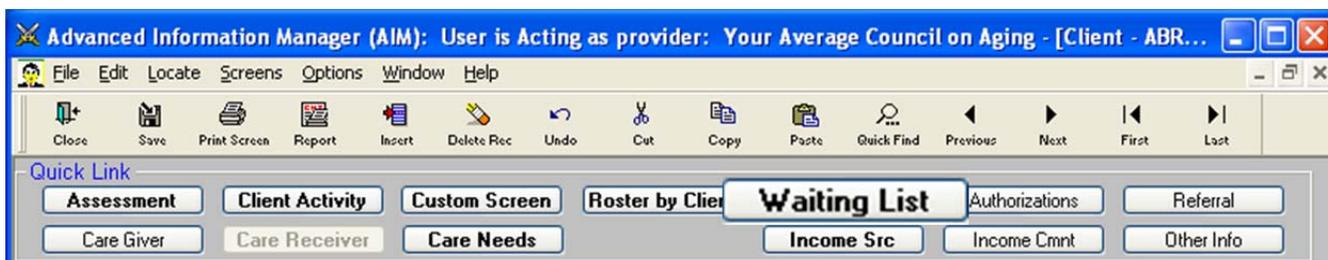
The **Roster by Client** Button pops up a window where



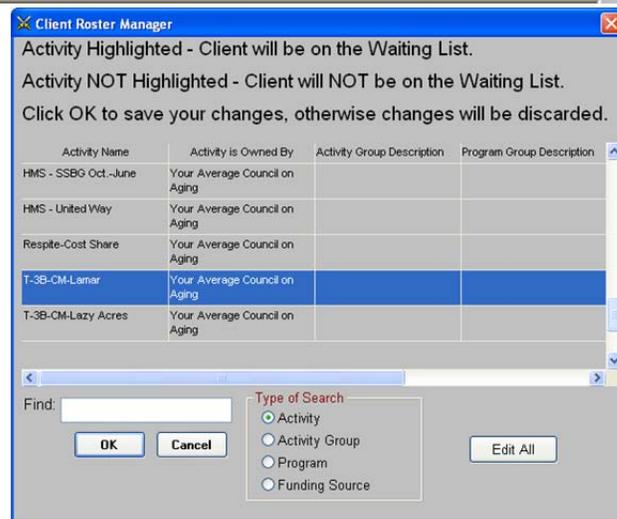
you can add this client to, or remove this client from, one or more rosters. Using this button, you can add or remove the client from the Roster(s) at the time that you initially enter the client or when you go into the client's record to change the status. (See **Chapter VI** (6) for instructions on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

Waiting List

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.

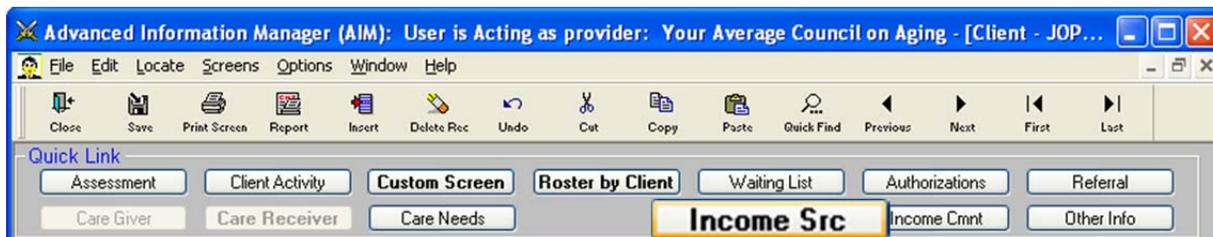
Care Needs

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.



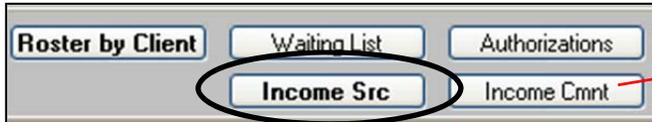
Use the following rules to determine what amount(s) to enter in this **REQUIRED** window:

- 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:

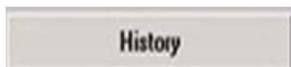
Then you should refer to the most current HHS Poverty Guidelines. You will ask the client for the "Household Size" (number in the household) and then ask if they are equal to or below the corresponding income figure. If YES, enter that dollar figure. If NO, and they are above that figure, enter \$9999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

Assessment	Client Activity	Custom Screen 1	Roster by Client
History	Care Needs	Custom Screen 2	Owners

General Intake Information

Contact Date: 00/00/0000 Date of Birth: 02/26/1949 Age: County: YORK Rural Area

Unique ID: **AN0-01-78786** Caregiver Volunteer Status: Status Date: Region # 3

Actual SSN: 260-00-0001 Client / CR Active (Area Office)

APM Hosted: User is Acting as provider: Catawba Area Agency on Aging Caregiver

File Edit Locate Screens Options Window Help

Client - Test, Paula

Quick Link: Assessment, Client Activity, Custom Screen 1, Register by Client, Waiting List, Authorizations, Referral, History, Case Needs, Custom Screen 2, Owners, Income Sec, Income Cont, Other Info

General Intake Information

Contact Date: 00000000 Date of Birth: 09/04/1950 Age: 52 County: York Rural Area
 Unique ID: AM00138888 Caregiver Volunteer Status: Status Date: Region #
 Actual SSN: 260-00-0000 Client / CR Active (Area Office)

Individual Intake Information

Title: Last Name: First Name: Middle Name: E Contact Name:
 Test Paula E Contact Phone: () -
 Home Phone: () - Work Phone: () - E Cell Phone: () -
 Cell Phone: () - E-mail Address: E e-mail:
 Physical Address: Is Physical the Mailing Address Other Address: Is Other the Mailing Address
 Add1: Dfjlsdf Add: PO Box
 Add2: Sdfasdfa Add2:
 City: Rock Hill City: ROCK HILL
 State: SC Zip Code: 29730 State: SC Zip Code: 29730

Employment Data

Employer Info: Occupation: Status: Retired CG Advocate:
 Other Information: Race: African American Total Income: 00
 Ethnicity: Non-Hispanic Total Expenses: 00
 Marital Status: Widowed Special Eligibility:
 Gender: Female DOB Verification: Driver's License:
 Consent Release: Yes # in Household: 1

History - List of Revisions by date

Modified Date	Action Taken	Provider (Acting As)	Modified By User
2/27/2012 09:06:09	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:06:08	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:05:40	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:05:39	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:04:21	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:04:19	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:04:00	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:03:52	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:03:49	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:03:43	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:03:19	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:03:10	updated	Catawba Area Agenc	SCREGION
2/27/2012 09:02:56	updated	Catawba Area Agenc	SCREGION
2/24/2011 11:45:00	updated	Lieutenant Governors	DBA

Data before Current Revision

SSN: AM0013888
 Actual SSN: 260000000
 Last Name: Test
 First Name: Paula
 Middle Name:
 Address1: Dfjlsdf
 Address2: Sdfasdfa
 City: Rock Hill
 State: SC
 Zip Code: 29730
 County: York
 Dob: 9/4/1950
 Sex: Female
 Marital Status: Widowed
 Race Code: African American
 Hispanic: false
 IsClient: true

For Technical Support Call (888) 373-2090

Link to Caregiver:

Buttons: Waiting List, Authorizations, Referral, Income Src, Income Cmnt, Other Info

Modal Window: Select people that are caring for Test, Paula.

Highlight people that are caring for Test, Paula. Click OK when finished to save your selection.

Client ID	Last Name	First Name	Middle Name	Status	Date of B
cg0-00-2892	Tabor	Julia		Active	10/30/1932
cg0-00-2491	Talley	Danny		Active	8/28/1955
cg0-00-2770	Tatman	Beth		Active	6/21/1949
AND-01-54006	Taylor	Debra		Active	4/29/1963
cg0-00-2726	Taylor	Jo		Active	12/1/1931
AND-01-53928	Templeton	Anna		Active	3/4/1937
cg0-00-2405	Terry	Perrie	Michelle	Active	7/19/1962
AND-01-78786	Test	Velma		Active	2/26/1949
AND-01-73588	Teuton	Dorothy		Active	2/1/1931

Find: Test, Velma

Type of Search:
 Client Name (Last, First)
 Client SSN

Buttons: OK, Cancel

Right Panel: Add CG, Caring for this Client
 Caregiver Name
 Relationship of CG to CR

Right Panel: Add CR, Clients Being Cared For
 Client Name
 Relationship of CG to CR

Link to Care Receiver:

Buttons: Roster by Client, Waiting List, Authorizations, Referral, Owners, Income Src, Income Cmnt, Other Info

Modal Window: Select Clients for that are being cared for by Test, Velma.

Highlight Clients for that are being cared for by Test, Velma. Click OK when finished to save your selection.

Client ID	Last Name	First Name	Middle Name	Status	Date of B
AND-01-38808	Test	Paula		Active	9/4/1950
cg0-01-2891	Testa	Michael		Active	11/1/1936
AND-01-73590	Teuton	Robert		Active	10/15/1930
AND-01-53714	Tevebaugh	Ruby		Active	10/22/1926
AND-01-60980	Thomas	Carol	L	Active	9/27/1932
AND-01-53454	Thomas	Doris		Active	3/7/1927
AND-01-54044	Thomas	Edna		Active	1/9/1936
cg0-01-2892	Thomas	Naquone		Active	1/8/1993
cg0-01-2894	Thomas	Raymond		Active	2/13/1926

Find: Test, Paula

Type of Search:
 Client Name (Last, First)
 Client SSN

Buttons: OK, Cancel

Right Panel: Add CG, Caring for this Client
 Caregiver Name
 Relationship of CG to CR

Right Panel: Add CR, Clients Being Cared For
 Client Name
 Relationship of CG to CR



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