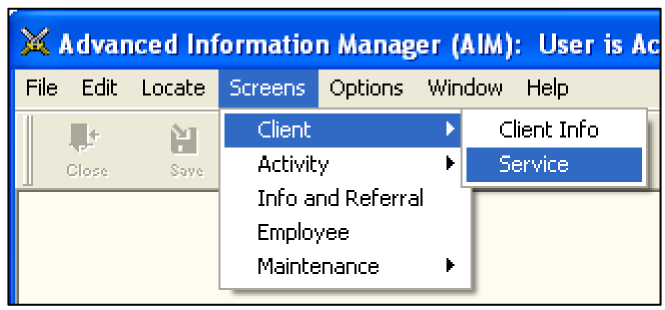
Chapter V **ACTIVITY DATA (Service Units)**

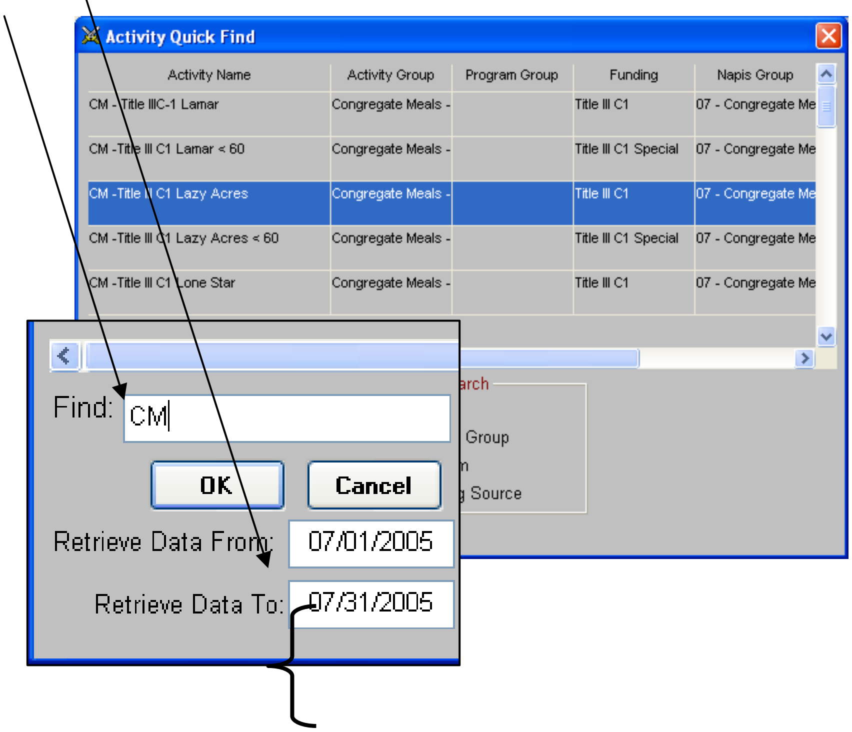
Activity input in ***AIM*** consists of crediting units of service to individuals served by the provider. There are four (4) ways to enter activity data:

- Entry by a specific service (i.e., activity)
- Entry by a specific client
- Entry by scanner wand using the bar-code scanner and printed bar-coded rosters
- Entry by keyboard using the bar-code scanner screens

PART A: Entering Activity Units from the Service Screen



1. **Click** on **Screen**, then **Client**, then **Service**.
2. The **Activity Quick Find** screen will appear.
3. **Enter** the **date range** for which you plan to enter units.
4. **Type** in the **Find** box the first few letters of the Facility providing the service which you will be entering units. **Scroll** to, the Funding, Activity (Service).
5. **Double-Click** on the Activity to begin entering units (or Single-Click on the Activity and then **Click OK**.

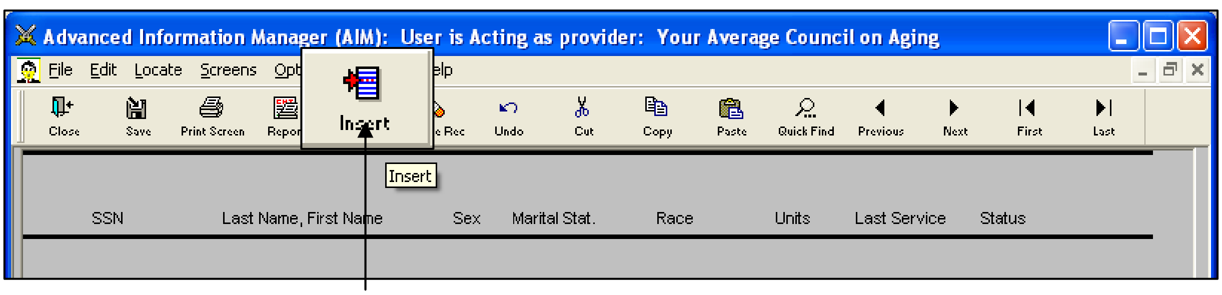


6. If no Activity units have been entered, for this Activity, during the date range specified, as yet, a window will pop-up asking if you want ***AIM*** to display a blank screen where you can start entering units of service. (If units have previously been entered for this service, they will display in place of the blank window.)

7. **Click** "**Yes**", if you get the pop-up Question, otherwise proceed to the next step.

NOTE: The name of the Activity you selected will NOT show as yet on the Activity Screen, so be CERTAIN that you selected the Activity you meant to select.

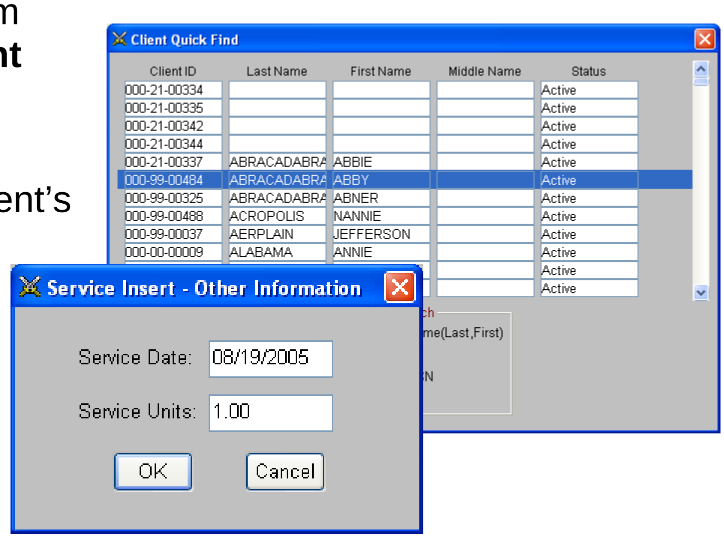
8. The **Activity Screen** will be displayed.



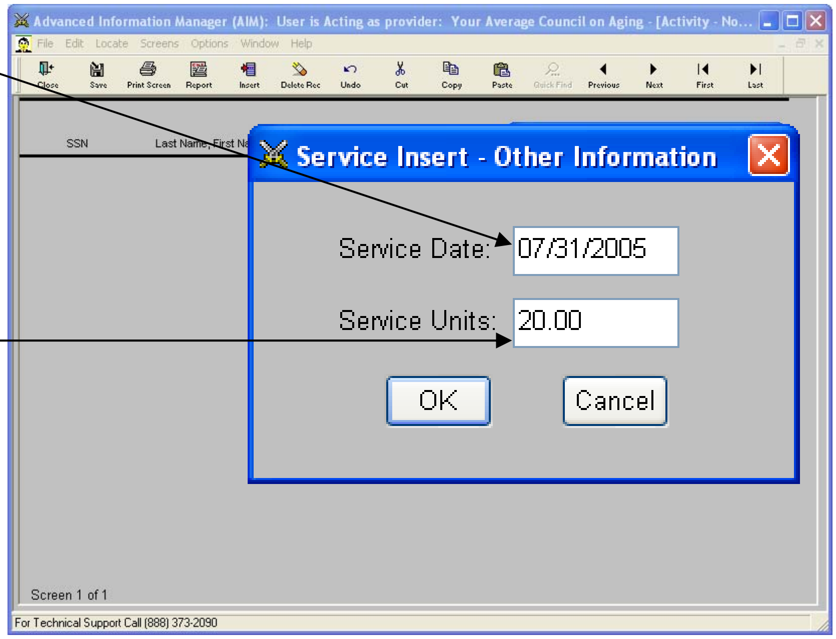
9. **Click** the **Insert** icon from the menu bar. The **Client Quick Find** screen will appear.

10. **Double-click** the first client's name for which you are going to enter units.

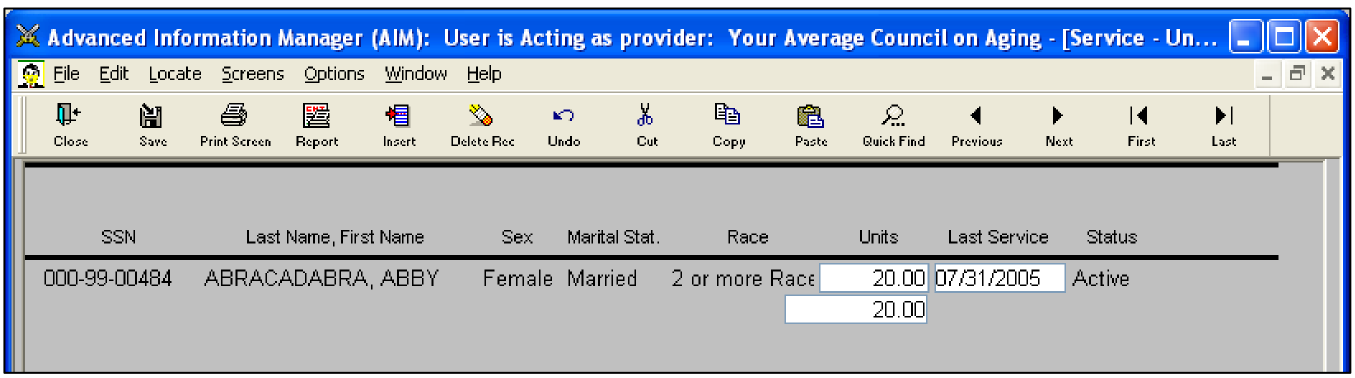
The **Service Insert** screen appears, pre-set with today's date and 1.00 Service Unit.



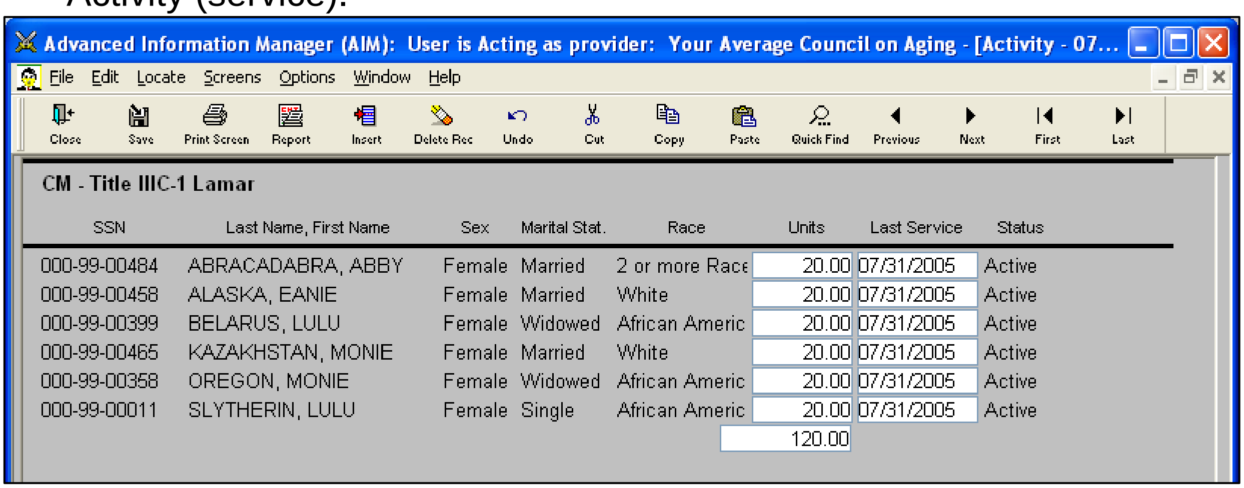
11. **Click** on the **Service Date** field and enter the date for which you are posting units.
12. **Click** on the **Service Units** field and enter the number of units you are posting.
13. **Click OK**.



14. The client's name and some demographic information will display, along with the date, number of units, and Activity name.



15. Continue steps 9 -14 until you have entered all clients (records) for that Activity (service).



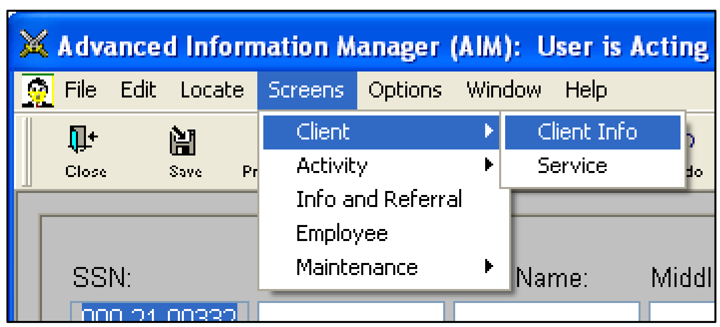
16. If you exit from the Activity Screen and then go back in, choosing the Activity and data range for which you just entered units, the name of the Activity will display. You can also balance from this screen, as it keeps a running total of the units entered (see screen above).

NOTE: There are several different strategies for entering service units, all of which are acceptable:

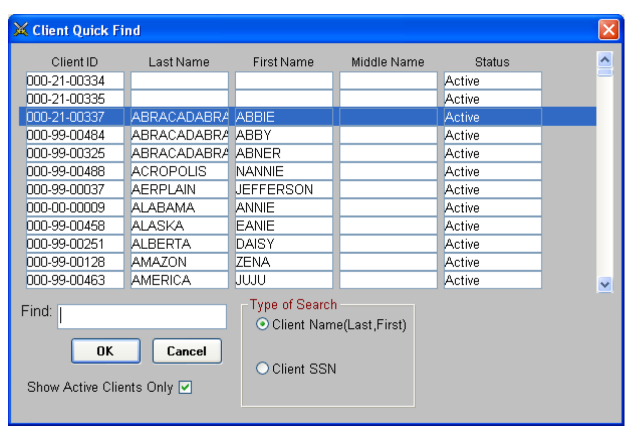
- **Monthly:** Using this method, you enter the total units of service a client received for the month and you use the Last Day of the Month of service for the date of posting. This is useful if you use Monthly Service Rosters to record clients' units of service.
- **Weekly:** Using this method, instead of waiting until the end of the month to enter units, you tally them up weekly by client and you use the Last Day of each of the Weeks of service for the dates of posting. This is useful if you use Weekly Service Rosters to record units of service.
- **Daily:** Using this method, you enter exactly how many units of service a client received on each day the client received service. This is useful if you want daily tallies to be able to track client participation frequency.

PART B Entering Activity Units from the Client's Activity Screen

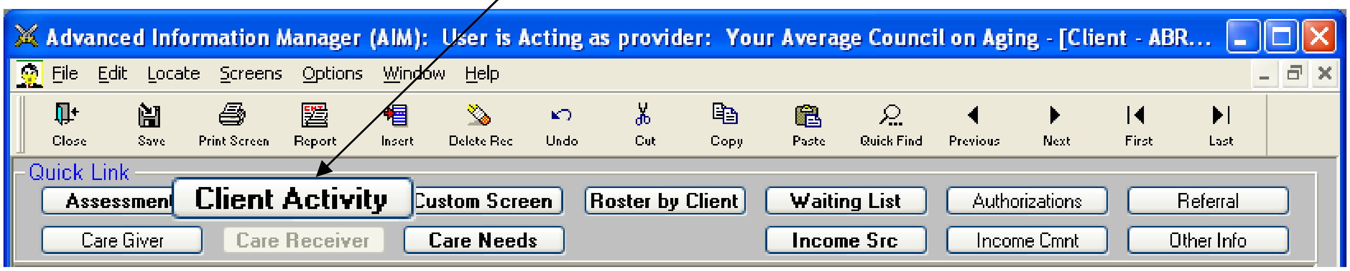
1. **Click** on the **Screens** menu item, then **Client**, then **Client Info**.



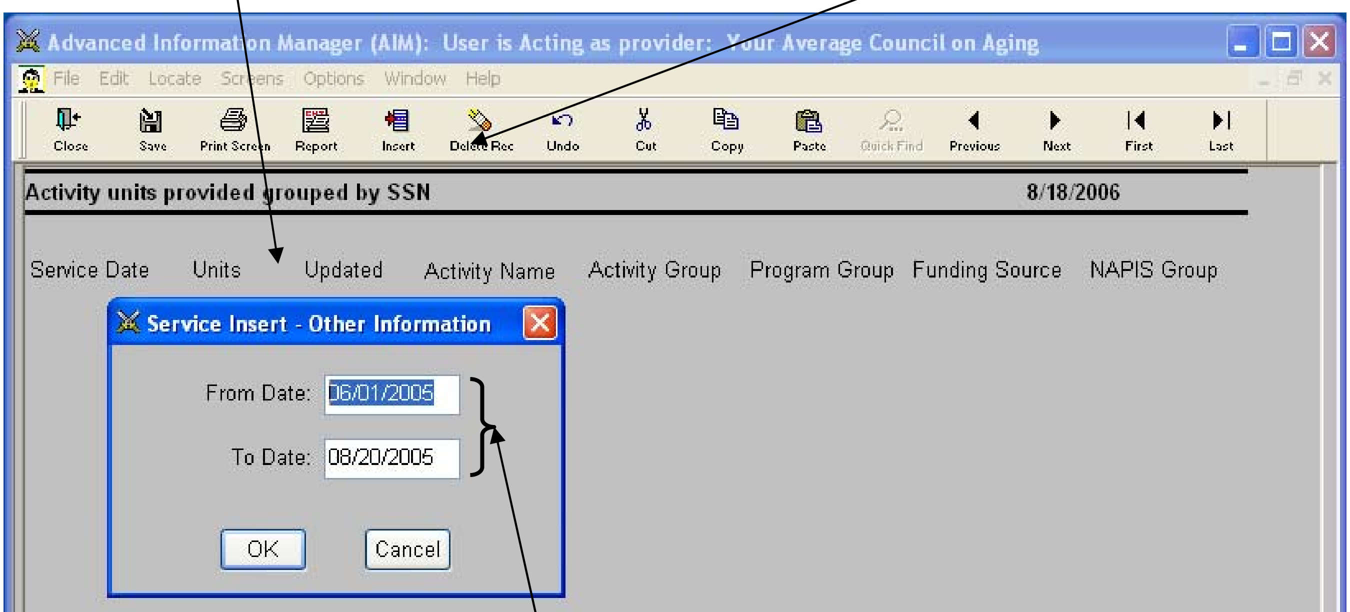
This will bring you to the **Client Quick Find** screen.



2. **Type** in the last name of the client for whom you are entering units of service, then scroll to find the correct client and **double-click** on the name.
3. The **Client Screen** for that client will display.
4. Click on the **Client Activity** Quick Link button.

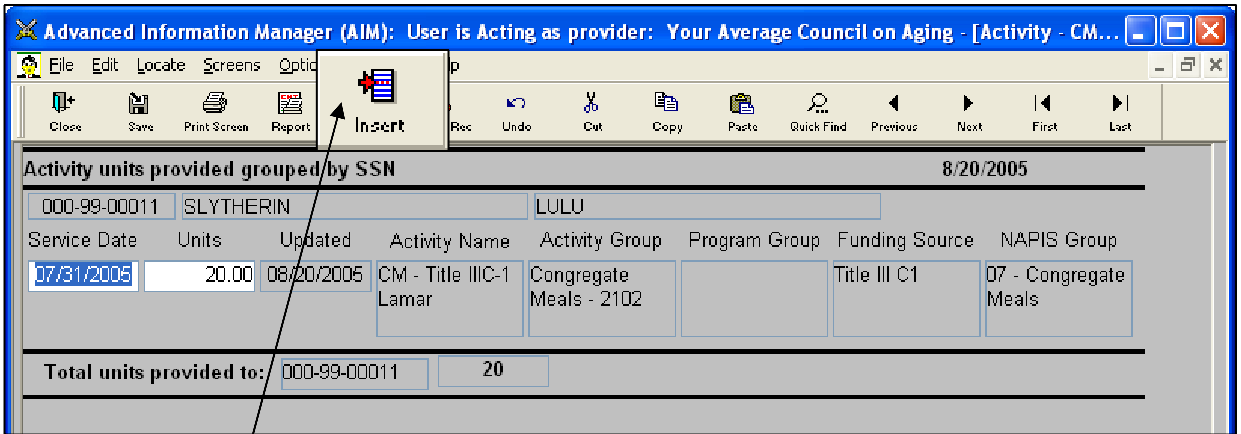


5. The "**Activity units provided grouped by SSN/Unique Identifying Number**" screen will appear with a "**Service Insert – Other Information**" window on top.



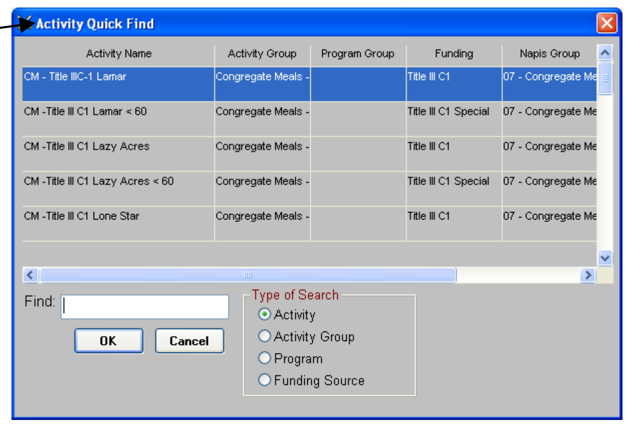
6. Enter the date range for which you are posting units of service for this client and **Click OK**.

7. The Activities that have been posted for the client and date range specified (or a blank screen if no units exist) will display.



8. **Click Insert** to begin entering units for this client.

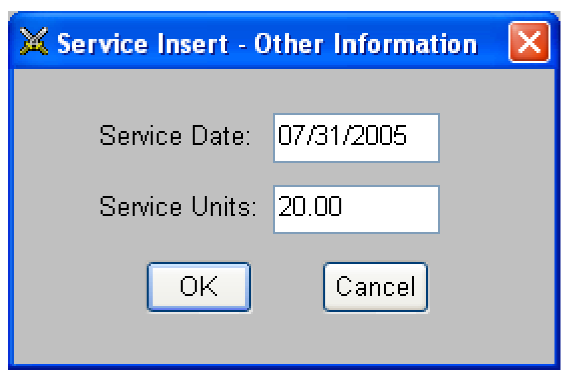
9. The **Activity Quick Find** screen will appear.



10. **Type** in the **Find** box the first few letters of the Facility providing the service for which you will be entering units. **Scroll** to Funding, Activity (Service).

11. **Double-Click** on the Activity to begin entering units (or Single-Click on the Activity and then **Click OK**.

12. A **Service Insert** window will pop-up.



13. **Double-click** on the "**Service Date**" field to highlight it, then **Type** the **Date** for which you are posting units.

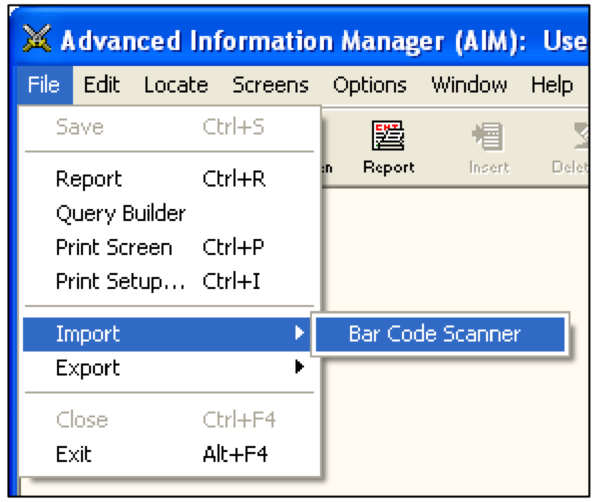
14. **Double-click** on the "**Service Units**" field to highlight it, then type in the number of units for the activity you are posting.

14. **Click OK**.

15. To enter another activity, **click** on the **Insert** icon again and follow steps 7-14 above until all activities for this client have been posted.

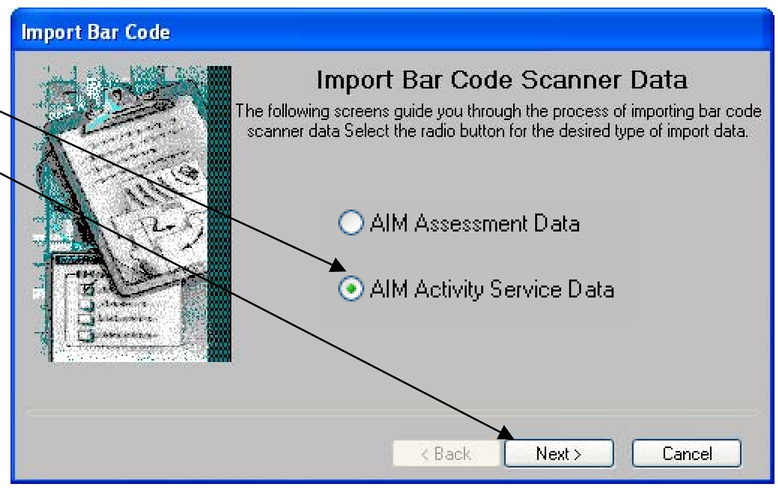
PART C: Entering Activity Units from the Bar Code Scanner Screens

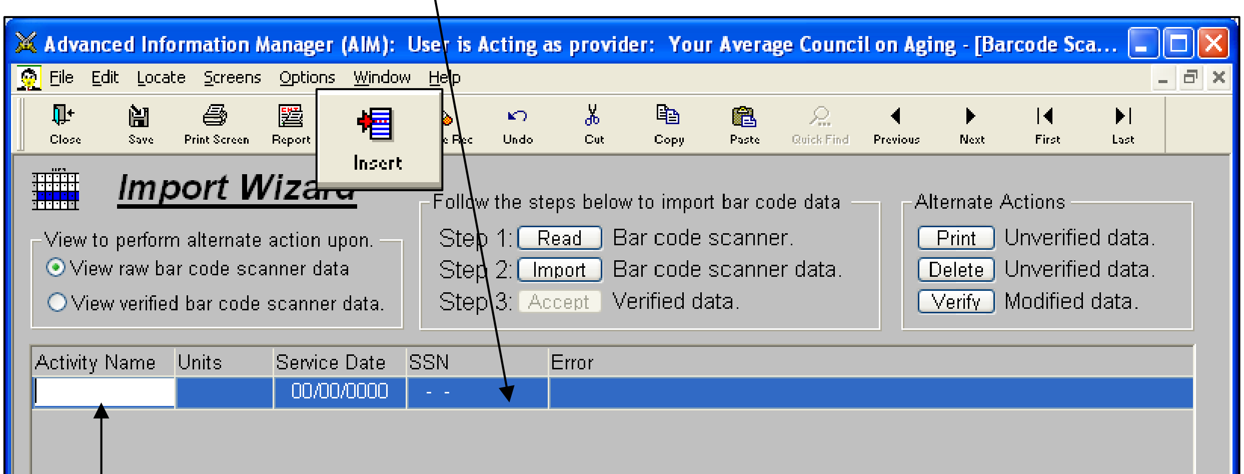
1. **Click** on the **File** menu item, then **Import**, then **Bar Code Scanner**.



2. The **Import Bar Code Scanner** window will appear.
3. **Click *AIM* Activity Service Data.**
4. **Click "Next."**

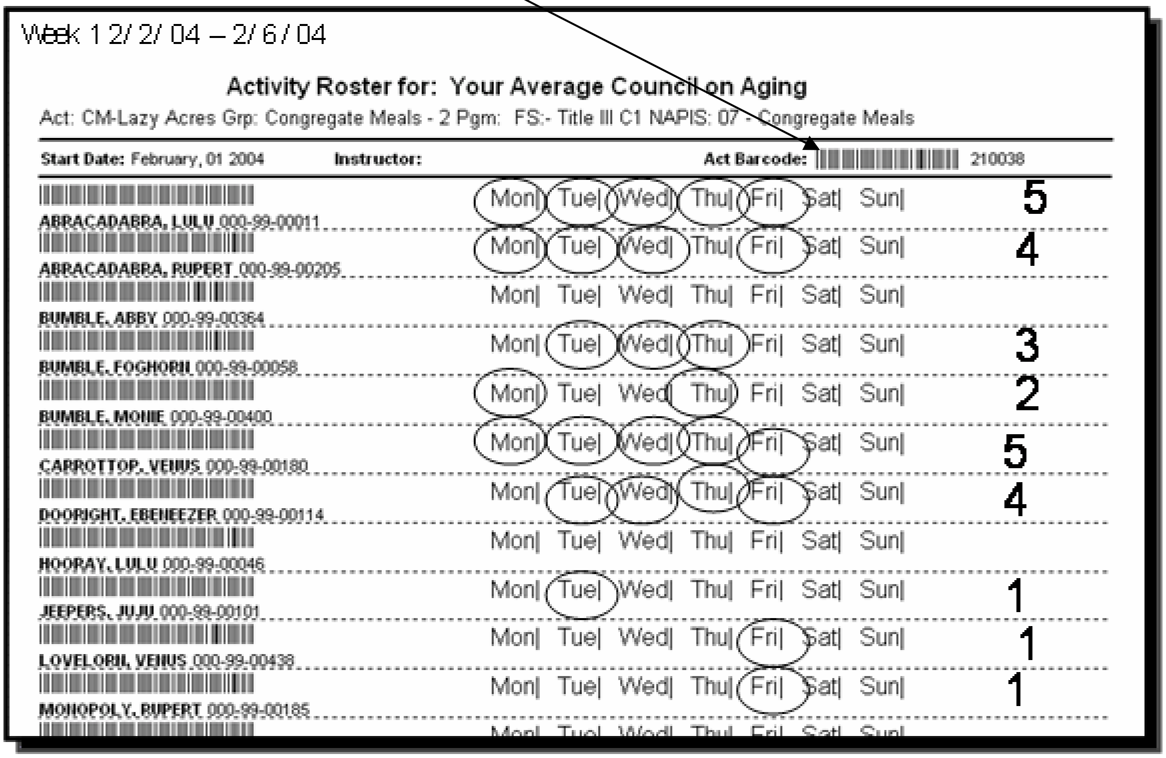
   The **Import Wizard** screen will appear.
5. **Click** on the **Insert** icon.
6. A blank row will appear across the screen under all columns.





7. **Click** in the first field under the column headed **Activity.**

8. On your **Activity Roster**, position the scanner over the bar code for the **Activity Definition**.

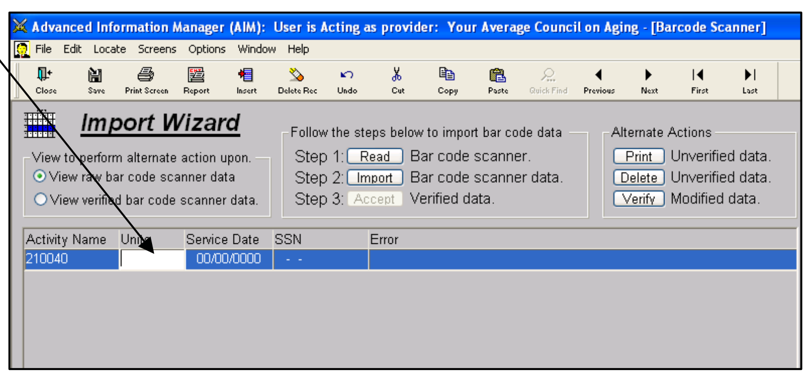


Note: the scanner does not need to touch the bar code. The laser beam should be positioned so that it covers the entire bar code to be scanned.

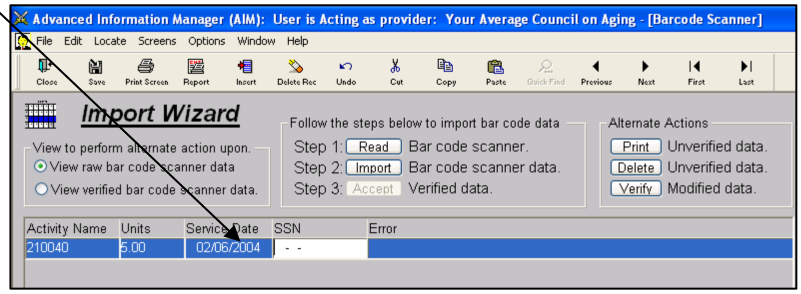
9. **Pull the trigger** on the scanner. The scanner will beep twice, and the activity code will appear under the **Activity**.

10. <**TAB**> to the "**Units**" field in the ***AIM*** window.

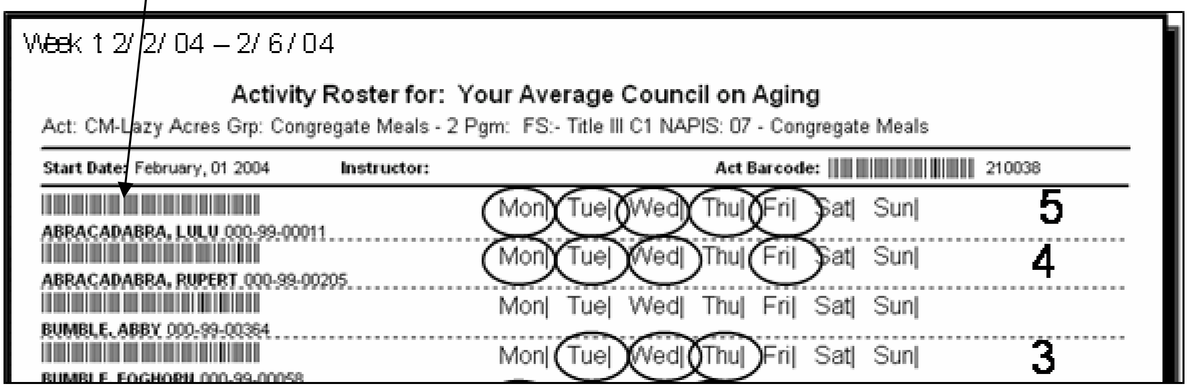
11. **Type** a "0" for the number of units And <**TAB**> over to the **Service Date**.



12. **Type** in the **Service Date** for which you are posting units. And **TAB** over to the **SSN/UIN**.



13. Position the scanner over the bar code for the "**SSN/UIN**" field.

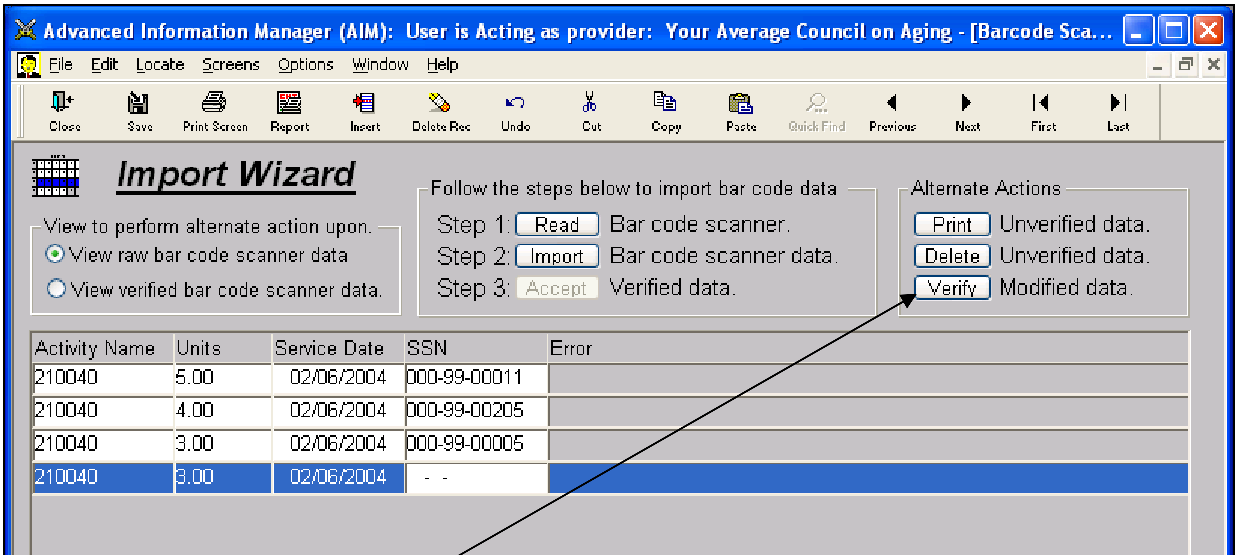


14. **Pull the trigger** on the scanner. When accepted by the program, the scanner will beep twice, and the client's SSN/UIN will appear under the **SSN/UIN** column in the ***AIM*** window.

> **NOTE:** It is more efficient to type a "0" for the number for the units (or the most common number of units) and scan all the SSN/UINs with the same number of service units. Then, after the units have been imported, go to the Services Screen, and change the unit numbers to the correct units. (See Below.)

15. At the same time the SSN/UIN appears under the SSN/UIN column, a new row will automatically be inserted with the Activity Code, Number of Units, and Service Date as the row immediately above.

16. Continue in this manner until all items on the Activity Roster have been entered.



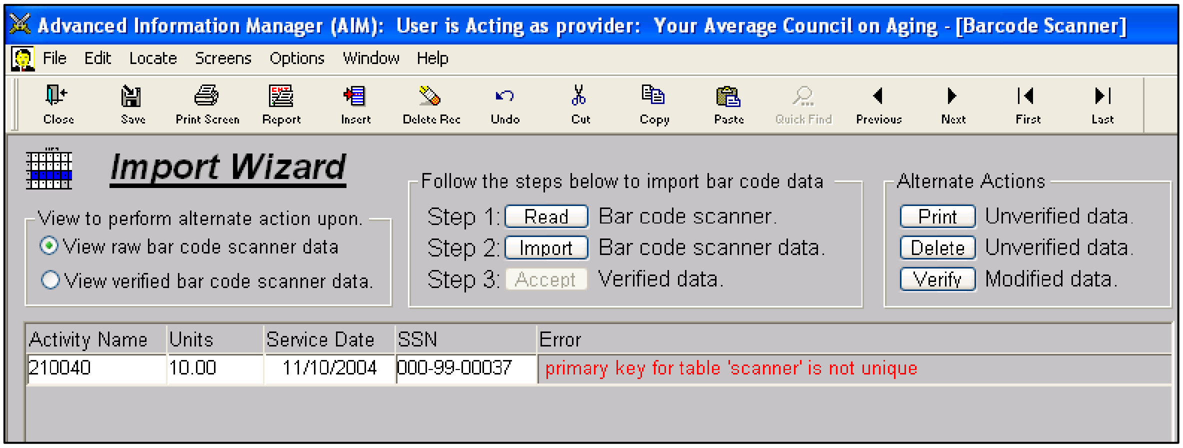
17. **Click** on the **Verify** Button.

18. One by one, the rows will disappear, leaving only the rows that have errors (if any).

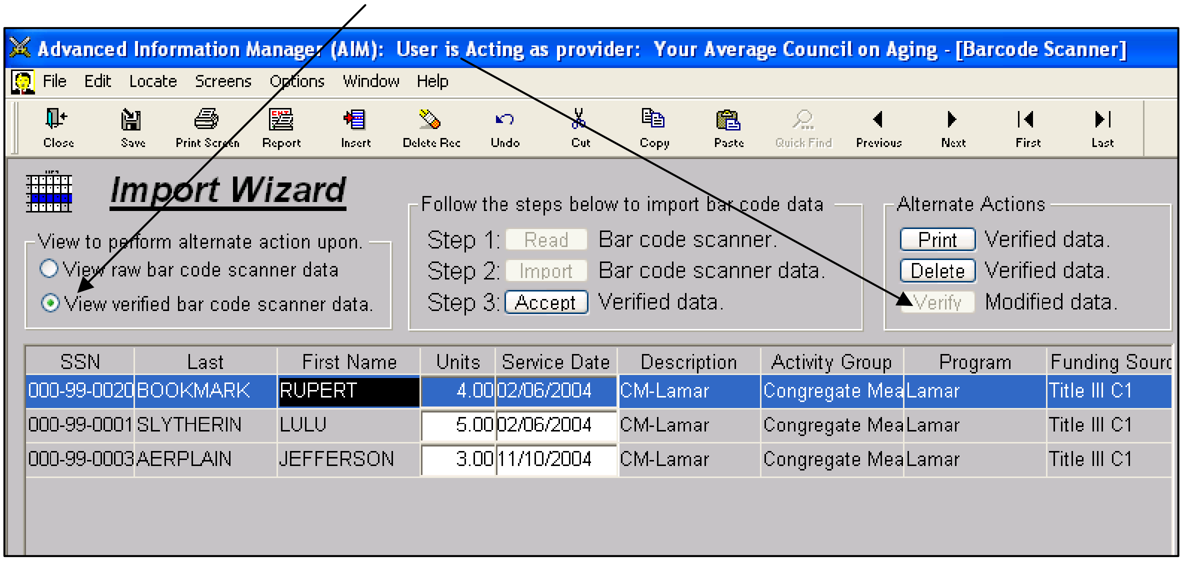
19. Use the chart below to correct errors.

Error Condition says…	**Interpretation…**
no primary key value for foreign key **'activity'** in table 'scanner'	**Activity** code is wrong in the Activity Name column. Check the Activity number against the Activity number in the SC39 report.
no primary key value for foreign key **'client'** in table 'scanner'	The **SSN/UIN** for the client is incorrect. There is no such SSN for any client in the database. Check the SSN/UIN for that client in the ***AIM*** Client Screen and correct it.
primary key value for table 'scanner' **is not unique**	That particular Activity for that particular client on that particular date has **ALREADY been entered**. Either you scanned the same bar-code twice, or if you have lots of these messages, the service units you are entering are the already in the system.

20. After Correcting the rows you can correct, **Delete** the rows that remain by pressing **Delete** Unverified data.



21. Click on the "**View verified bar code scanner data**" radio button.



22. **DO NOT** make any changes from this screen. If you see mistakes on this page, make a note of them and correct the information from the Service Screen.

23. Click **Accept** Verified data.

24. Again, one by one the rows will disappear.

25. From here, you can either **click Close** to close the Import Service Unit function or you can **click** "**View raw bar code scanner data**" to and repeat steps 5 – 26.

NOTE: If you don't have a bar-code scanner, but you're quick with a number key-pad, you can follow the instructions above, but in place of SCANNING a BAR CODE, you will TYPE the BAR-CODE (the number appears beside the Activity Code and the Client's ID/SSN). Once you have all the information typed in the FIRST line you inserted, simply tap the ENTER KEY on your keyboard and the information will automatically fill in for the next row and be ready for you to TYPE then next client ID/SSN!