



Improving Collection *of* Poverty Level in ARIES

April 27, 2011

teamwork

teamwork

Welcome!

- The State Office of AIDS continues to work with providers to improve data quality in ARIES.
- Today's webinar will focus on collecting:
 - Monthly Household Income and
 - # of People in Household.
- Collecting these variables generates clients' Percent of Federal Poverty Levels.

Objectives

- Discuss Poverty Level importance and definition
- Review how to edit Poverty Level
- Provide tips for Collecting Monthly Household Income and # of People in Household
- Show how to run the Fix-It: Poverty Level Report
- Questions, Answers and Closing

Poverty Level Importance

- This field is critical in ARIES for several reasons:
 - It helps providers assess the severity of their clients' financial situation; it is especially helpful for their HIV/AIDS case management and needs assessments.
 - It can assist providers in determining eligibility for certain services and programs.
 - It assists agencies, fiscal agents and the CA OA in monitoring HIV/AIDS clients' financial circumstances in their respective areas.

Poverty Level Importance

- Poverty Level is also critical because it is required for:
 - HIV Care Program (HCP),
 - Medi-Cal Waiver Program (MCWP)
 - Health Insurance Premium Payment Program (CARE/HIPP) and
 - HRSA's Ryan White Services Report (RSR).
 - Note: HOPWA requires this information but it is collected within the HOPWA screens in ARIES.

Poverty Level Fields - Definitions

Data Element	Definition
Monthly Household Income	Enter the combined income of every individual in the client's household (including the client), related or not. Use the format as in the following example: 1,500.00. No dollar sign.
# of People in Household	Enter the total number of persons in the household, including the client.
% Federal Poverty Level	This percentage will be automatically calculated when you save the screen. It can only be edited by editing the Monthly Household Income and/or the # of People in Household data fields.

Poverty Level – Definition

- Each year, the Federal Poverty Guidelines are published by the Federal Department of Health and Human Services. The poverty index tells you how a person or family's income compares to the federal poverty threshold.
- The next slide displays the 2011 Poverty Guidelines for 48 continental states and the District of Columbia (it excludes Alaska and Hawaii).

Poverty Level - Definitions

Persons in Household	2011 Poverty Guideline
1	\$10,890
2	\$14,710
3	\$18,530
4	\$22,350
5	\$26,170
6	\$29,990
7	\$33,810
8	\$37,630

***Households with more than 8, add \$3,820 for each additional person.**

***Federal Poverty Guidelines from: <http://aspe.hhs.gov/poverty/11fedreg.shtml>**

Poverty Level Fields – Definitions

- Note that Monthly Household Income and # of People in Household are HRSA required fields; this is denoted in ARIES by the large red asterisks that are next to these fields.
- Also note that each year, the State OA updates the Federal Poverty Index calculations in ARIES so that your edits, changes or new data will will reflect current Federal Poverty Guidelines.

Poverty Level – Definition

- ARIES calculates the Percentage of a client's Federal Poverty Level based on the information in the Monthly Household Income and # of People in Household fields.
- In ARIES, these fields are located on the Eligibility major tab, Financial subtab.
- The Monthly Household Income and # of People in Household fields are required for ARIES to successfully generate the % Federal Poverty Level.

Editing Poverty Level

- We're going to review the steps for editing Poverty Level for an existing client.
- We'll also provide tips for collecting accurate information.

Begin by finding the client record and going to the Financial Subtab...


< Back Home Find New Reports Shortcuts Help Logout

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

Client Search

To find a client, or to check if a client is new to your agency, enter in some or all of the following information. You may use the wildcard *.

Last Name	<input type="text" value="Ashton"/>	
First Name	<input type="text" value="Zach"/>	
Middle Initial	<input type="text"/>	
Client ID	<input type="text"/>	
SSN	<input type="text"/>	123-45-6789
Date of Birth	<input type="text"/>	mm/dd/yyyy
Display	<input type="text" value="20"/> results	
<input type="checkbox"/> Search Related/Affected Individuals		
<input type="button" value="Search >"/>		



From the Financial Read-Only screen, click “Edit.”

Back Home Find New Reports Shortcuts Help Logout
 DEMO DEMO DEMO DEMO DEMO DEMO DEMO

DEMO-GRAPHICS **ELIGIBILITY** PROGRAMS MEDICAL MEDICATIONS RISK & ASSESSMENTS CARE PLAN CASE NOTES SERVICES CUSTOM DATA

ELIGIBILITY DOCUMENTS FINANCIAL INSURANCE FINANCIAL ARIES

Zach A Ashton ⚠

Financial **Edit** ←

Employment: Unknown
 Public Assistance:
 # Children in Household:
 # HIV+ People in Household:
 Current Income (Monthly)

Type	Amount	Shared by	Poverty Index
Client	\$0		
Household	\$1,000	0	169%
Family	\$121	0	20%

Income History (Monthly)

Date	Client	Household	Family
4/27/2010	\$0	\$1,000	\$0

[Contact Information](#)

Income Detail/Assets (Client has no income)

Source (Monthly):	Amount:
Total	\$0.00

Owns house: No
 Owns car: No
 Dollar Amount of Other Assets: None

Go to the Household Income section in the middle of the screen. Monthly Household Income, # of People in Household and % Federal Poverty Level are here.

Financial for Zach A Ashton ⚠

CLIENT INCOME

(Amounts are monthly) Employed: Unknown Public Assistance: []

Employment/Wages	[]	State Disability Ins/SDI	[]	Retirement	[]
Supp Security Income/SSI	[]	Long-term Disability/LTD	[]	Investment	[]
Soc Sec Disability Ins/SSDI	[]	Worker's Compensation	[]	Gift	[]
Social Security Retirement	[]	TANF CalWORKS	[]	other 1	[]
Gen Assist/Gen Relief GA/GR	[]	Veterans Benefits/VA	[]	other 2	[]
Unemployment/UI	[]	Alimony/Child Support	[]	other 3	[]
Total	0.00	<input checked="" type="checkbox"/> No source of income		Food Stamps	[]

HOUSEHOLD INCOME

Monthly Household Income *	[1,000.00]	Percent Federal Poverty Level	[110%]
# People in Household *	[1]	# HIV+ People in Household	[]
# Children in Household	[]		

FAMILY INCOME



To edit the % Federal Poverty Level, put in the new Monthly Household Income and # of People in Household. Note the new information.

DEMO DEMO DEMO DEMO DEMO DEMO DEMO

Financial for Zach A Ashton

CLIENT INCOME


Amounts are monthly) Employed Public Assistance

Employment/Wages	<input type="text"/>	State Disability Ins/SDI	<input type="text"/>	Retirement	<input type="text"/>
Supp Security Income/SSI	<input type="text"/>	Long-term Disability/LTD	<input type="text"/>	Investment	<input type="text"/>
Soc Sec Disability Ins/SSDI	<input type="text"/>	Worker's Compensation	<input type="text"/>	Gift	<input type="text"/>
Social Security Retirement	<input type="text"/>	TANF CalWORKS	<input type="text"/>	other 1	<input type="text"/>
Gen Assist/Gen Relief GA/GR	<input type="text"/>	Veterans Benefits/VA	<input type="text"/>	other 2	<input type="text"/>
Unemployment/UI	<input type="text"/>	Alimony/Child Support	<input type="text"/>	other 3	<input type="text"/>
Total	<input type="text" value="0.00"/>	<input checked="" type="checkbox"/> No source of income		Food Stamps	<input type="text"/>

HOUSEHOLD INCOME

Monthly Household Income *	<input type="text" value="1800"/>		Percent Federal Poverty Level	<input type="text" value="110%"/>
# People in Household *	<input type="text" value="2"/>		# HIV+ People in Household	<input type="text"/>
# Children in Household	<input type="text"/>			


ARIES will recalculate the % Federal Poverty Level, upon saving this screen. At the bottom of the screen, click “Save & Next” or “Save & Done.”

 **ASSETS**

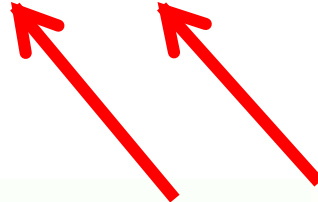
Do you own: a house? a car?

Do you have other assets?

Dollar Amount of Other Assets

 **INCOME HISTORY**

Date	Monthly Client Income	Monthly Household Income	Monthly Family Income	
4/27/2010	\$0.00	\$1,000.00	\$0.00	<input type="button" value="Edit"/> <input type="button" value="New"/>



Note that if you go back into the Financial “Edit” screen, you will see your new % Federal Poverty Level re-calculated.

Financial

DEMO DEMO DEMO DEMO DEMO DEMO DEMO DEMO

Financial for Zach A Ashton ⚠

CLIENT INCOME

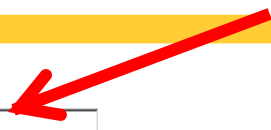
(Amounts are monthly)

Employed	Unknown	Public Assistance	
Employment/Wages	<input type="text"/>	State Disability Ins/SDI	<input type="text"/>
Supp Security Income/SSI	<input type="text"/>	Long-term Disability/LTD	<input type="text"/>
Soc Sec Disability Ins/SSDI	<input type="text"/>	Worker's Compensation	<input type="text"/>
Social Security Retirement	<input type="text"/>	TANF CalWORKS	<input type="text"/>
Gen Assist/Gen Relief GA/GR	<input type="text"/>	Veterans Benefits/VA	<input type="text"/>
Unemployment/UI	<input type="text"/>	Alimony/Child Support	<input type="text"/>
Total	0.00	<input checked="" type="checkbox"/> No source of income	
		Retirement	<input type="text"/>
		Investment	<input type="text"/>
		Gift	<input type="text"/>
		other 1	<input type="text"/>
		other 2	<input type="text"/>
		other 3	<input type="text"/>
		Food Stamps	<input type="text"/>

HOUSEHOLD INCOME

Monthly Household Income *	<input type="text" value="1,800.00"/>	Percent Federal Poverty Level	<input type="text" value="147%"/>
# People in Household *	<input type="text" value="2"/>	# HIV+ People in Household	<input type="text"/>
# Children in Household	<input type="text"/>		

FAMILY INCOME



Tips for Collecting Data that Generates Poverty Level

- Make sure that the income amount in the Monthly Household Income field is monthly (not annual).
- Update the Monthly Household Income and # of People in Household fields every time one of those fields changes; update annually at a minimum.
- Monthly Household Income and # of People in Household are not collected longitudinally; always enter new information over older information.

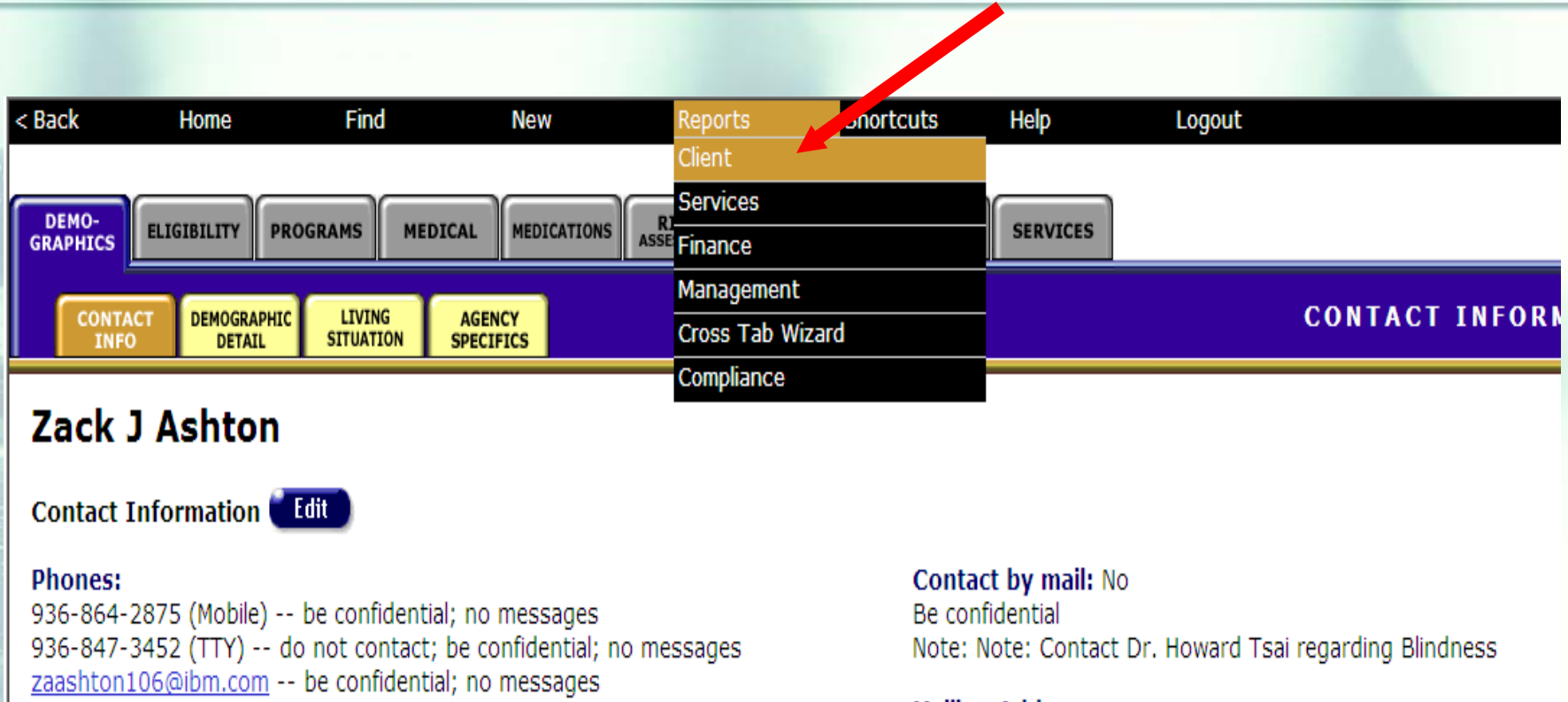
Poverty Level Reminder

- Remember, in order for ARIES to calculate the % Federal Poverty Level, you must put information in the following data fields:
 - Monthly Household Income
 - # of People in Household
- In order for ARIES to successfully populate the % Federal Poverty Level field, you must save the screen by clicking “Save & Next” or “Save & Done.”
- To view the updated % Federal Poverty Level, you must go back into the Financial screen.

Running the Fix-It Report

- We hope these tips help improve your data collection in the future.
- Some of your records need attention now. We have designed a report that will help you find records in your agency that need % Federal Poverty Level corrected and/or updated.

To locate the **Fix-It: Poverty Level** report go to **Reports** and select the **Client** menu.



The screenshot shows a web application interface. At the top, there is a navigation bar with links: < Back, Home, Find, New, Reports, Shortcuts, Help, and Logout. The 'Reports' menu is open, showing options: Client, Services, Finance, Management, Cross Tab Wizard, and Compliance. A red arrow points to the 'Client' option. Below the navigation bar, there are several buttons: DEMO-GRAPHICS, ELIGIBILITY, PROGRAMS, MEDICAL, MEDICATIONS, R ASSE, and SERVICES. Below these are four yellow buttons: CONTACT INFO, DEMOGRAPHIC DETAIL, LIVING SITUATION, and AGENCY SPECIFICS. On the right side, there is a purple bar with the text 'CONTACT INFORM'. Below the navigation bar, the profile for 'Zack J Ashton' is displayed. It includes a 'Contact Information' section with an 'Edit' button. The 'Phones' section lists: 936-864-2875 (Mobile) -- be confidential; no messages; 936-847-3452 (TTY) -- do not contact; be confidential; no messages; and zaashton106@ibm.com -- be confidential; no messages. The 'Contact by mail' section shows: No Be confidential; Note: Note: Contact Dr. Howard Tsai regarding Blindness; and three dots indicating more information.

The Fix-It: Poverty Level Report is located at the bottom of the report page.

[CD4 Test Report](#)

[Fix-It: Eligibility Documents](#)

Lists clients served within a date range and whether there is a Diagnosis Document at ANY agency (not required for R/A) and an ARIES Consent Form at THIS agency not more than 1 year old.

[ARIES ID and Primary Staff Person](#)

Lists all clients by ARIES ID including the name of the Primary Staff Person

[Fix-It: CD4 and Viral Load](#)

Lists clients served within a date range and any problems with CD4 tests or Viral Load tests

[RSR Enrollment Status](#)

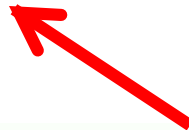
Shows a client's ARIES Enrollment Status and how that status will be reported on the RSR. Use a Service Date Range that matches your RSR reporting period, and "=1" for Is Ryan White Funded. The report lists all clients served, those with an Unknown RSR Status are listed first.

[Fix-It: Insurance](#)

Lists clients served within a date range and any problems with Insurance.

[Fix-It: Poverty Level](#)

Lists clients served within a date range and any problems with Household Income, Household Size, or Household Poverty Level



Input your specified dates on the Report Filter Value page. Click “Report” to generate your Poverty Level Report.

The screenshot shows a web application interface for generating a report. At the top, there is a navigation bar with links: < Back, Home, Find, New, Reports, Shortcuts, Help, and Logout. Below this is a yellow header bar with the word 'DEMO' repeated five times. The main content area is titled 'Report Filter Values' and 'Fix-It: Poverty Level'. It contains a form with the following elements: 'Service Line Item Service Date' with a 'Between' dropdown menu, two date input fields containing '4/1/2010' and '3/31/2011', and a '&' symbol between them. Below this is a 'Display' field with the value '10000', a 'results' label, and a checkbox for 'Display print format'. At the bottom of the form are two buttons: a yellow 'Report >' button and a blue 'Export' button. Three red arrows point to the date input fields, the 'Report >' button, and the 'Export' button.

Running the Fix-It Report

- What will appear is a report showing records for all clients served by your agency during the specified date range.
- Error messages will indicate which records need attention and why.
- The report will look something like this...

Sample Fix-It Poverty Level Report

< Back Home Find New Reports Shortcuts Help Logout						
DEMO DEMO DEMO DEMO DEMO DEMO DEMO						
Fix-It: Poverty Level						
ARIES ID	Client	Monthly Household Income	Household Size	Poverty Level	Errors	Service Count
10001806	Hopwa, Test T		4	0	Missing Household Income, Missing Poverty Level,	4
10004398	Hopwa, John A				Missing Household Income, Missing Household Size, Missing Poverty Level,	2
10004399	Hoopla, James A				Missing Household Income, Missing Household Size, Missing Poverty Level,	3
10001719	Bevins, Paula F	19,200.00	3	1258	Invalid Poverty Level,	2
10004394	Tran, Michelle B	4,000.00	5	183		1
10004337	Hopwa, Janet C	3,365.00	4	181		3
10001722	Ashton, Zach A	1,800.00	2	147		3

7 records, generated 4/6/2011 3:03:48 PM
Criteria: Service Line Item Service Date BETWEEN '4/1/2010' AND '3/31/2011'

[Export](#)



Running the Fix-It Report

<u>Error Message</u>	<u>Error Message Definition</u>
Missing Household Income	Household Income is NULL.
Invalid Household Income	Household Income is more than 0.00 but less than or equal to 1.00.
Missing Household Size	Household Size is NULL.
Invalid Household Size	Household Size is 0 or more than or equal to 10.
Missing Poverty Level	Poverty Level is NULL
Invalid Poverty Level	Poverty Level is more than or equal to 1,000%

Running the Fix-It Report

Tips for understanding the Fix-It Report:

- If the error message, “Invalid Poverty Level” is displayed, check to make sure your client’s Monthly Household Income field does not contain *annual* income. For example, a single client might have a monthly income of \$1,000 but perhaps the number in the data field represents annual income of \$12,000. If this is the case, change the number to the *monthly* income.

Running the Fix-It Report

Tips for understanding the Fix-It Report:

- If the clients' Federal Poverty Level (FPL) is less than 1,000% an error message *will not* display on the report (the error message, "Invalid Poverty Level" is displayed when clients' income levels are above 1,000% of the FPL). However, even though no error message will be displayed, it is recommended to double check all clients who are above 400% of FPL. As you will see in the next slide, clients who are at or above 400% of FPL make \$43,560 or more annually.

Running the Fix-It Report

The table below displays how the percentage of Federal Poverty Level is calculated; this visual provides a baseline of annual income amounts and their corresponding percentages of Federal Poverty Level. Note the calculations are based on the Poverty Guidelines for a single person family annual income of \$10,890.

FPL Calculation	Annual Income Amount	% of FPL
$\$10,890 \times 100\% =$	\$10,890	100%
$\$10,890 \times 200\% =$	\$21,780	200%
$\$10,890 \times 300\% =$	\$32,670	300%
$\$10,890 \times 400\% =$	\$43,560	400%
$\$10,890 \times 500\% =$	\$54,450	500%

Running the Fix-It Report

- Note that the Fix-It Poverty Level Report is somewhat different than other Fix-it Reports because you are to correct client records with error messages and it is recommended that you double check clients who do not have error messages but do have Federal Poverty Levels between 400-999%. See example below:

Fix-It: Poverty Level						
ARIES ID	Client	Monthly Household Income	Household Size	Poverty Level	Errors	Service Count
10001806	Hopwa, Test T		4	0	Missing Household Income, Missing Poverty Level,	3
10001777	Doe, Jane M				Missing Household Income, Missing Household Size, Missing Poverty Level,	1
10003764	Jones, Amy S				Missing Household Income, Missing Household Size, Missing Poverty Level,	1
10001719	Bevins, Paula F	19,200.00	3	1258	Invalid Poverty Level,	3
10001578	Ball, Crystal K	5,000.00	2	412		3
10004337	Hopwa, Janet C	3,365.00	4	181		2
10001722	Ashton, Zach A	1,800.00	2	147		4

Running the Fix-It Report

- In addition to reviewing clients who are between 400%-999% of FPL, please look up the clients with error messages using their ARIES ID.
- Resolve the error by looking in client's charts and/or assessments for the missing or inaccurate information.
- Then update the ARIES fields: Monthly Household Income and # of People in Household accordingly.

Questions & Answers

- Do you have any questions?
- **Additional Resources:**
 - This presentation is posted in the Training section of www.projectaries.org.
 - The **ARIES User Manual** can be accessed by pressing the F1 button while in ARIES.
 - The ARIES Help Desk can be reached at **866-411-ARIES (2743)**.

Thank you!

- Thank for participating! We hope that this has been a productive use of your time.
- Together we can improve ARIES data quality!