

ARIES R37 Client Help Manual

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Welcome to ARIES

This interactive guide will assist you with the creation and maintenance of data pertaining to clients and agencies within the AIDS Regional Information and Evaluation System (ARIES). To begin, continue to [Introduction to ARIES](#).



Help Release R38

About ARIES Client Care

This is Help Release R38 for the ARIES Client Care product.



Section 1

1 Introduction to ARIES

ARIES (AIDS Regional Information and Evaluation System) is a custom, Web-based, centralized HIV/AIDS client management system. The project grew out of a combined effort by the State of Texas, the County of San Diego, the County of San Bernardino, and the State of California. ARIES provides a single point of entry for clients and supports coordination of client services among providers. It meets both Health Resources and Services Administration (HRSA) and state care and treatment reporting requirements and provides comprehensive data for program monitoring and scientific evaluations.

Working with providers to organize, plan, manage, and report on available services furthers the goal of helping clients who suffer with AIDS. Through high-quality automated service tracking and reporting, ARIES centralizes client data, service details, and agency and staff information, giving agencies a more complete picture of a client's care plan and the services available.

Maximizing the quality of client services in this way results in better care. In addition, the use of ARIES by many agencies leads to the simplification of service referrals: With the client's permission, agencies can share an individual client's records.

ARIES administrators can customize the Web application for the individual agency by designing new reports and creating custom data fields.

Typical uses of ARIES available to agencies include:

- Intake - Enroll new clients and enter their records.
- Case Management - Complete assessments, create care plans, enter case notes, make referrals, associate clients with services.
- Service Providers, Clinicians - Access schedules, enter client notes, approve treatment plans.
- Agency Management - Generate reports to track costs, services, reimbursements, and grant writing.
- Research - Evaluate programs, analyze aggregate reporting and data while maintaining client confidentiality.

The next few Help sections describe ARIES [clients](#), [staff](#), [agencies](#) and [Tips and Tricks](#).

1.1 Clients

Clients are individuals who receive services from your agency. These services can include items such as medical care, housing, counseling, and meals. Clients may be HIV; they may also be related to, or affected by, persons with HIV (family members, dependents, and roommates) who may be eligible for services like housing assistance and transportation.

Once a client is entered into ARIES, and you have the proper permissions, you can perform a variety of actions such as assigning services to that client and entering client case notes. From the client screens, you can search for clients, create new client records (which contain the client's contact information and medical history), enter services for clients, and create client reports.

1.2 Staff

All services are administered by staff, which includes clinicians, receptionists, volunteers, administrators, and case managers.

Every staff person at your agency, full-time, part-time, or volunteer, should be added to ARIES, even if they don't directly use ARIES. Their inclusion in the system is important as it allows for more complete tracking of items such as staff information and their clients.

The staff screens allow you to search for staff at your agency, view their contact information, and edit their preferences and permissions.

1.3 Agencies

Agencies are organizations that administer services. All staff members and clients are associated with an agency. Clients registered with multiple agencies can agree to share their data between agencies, which can help facilitate services provided to clients.

Agencies that manage other agencies are known as administrative agencies, and are allowed to report on the administered agency's client and service data. Staff in administrative agencies can also create new agency records.

The agency screens in ARIES allow you to search for agencies, view agency addresses, manage agency contracts, and produce RSR/RDR/CADR reports. In addition, agency utilities are available for duplicate data merges, custom data creation, reallocation of service funding, and other actions.

A search for agencies by the services they provide is helpful when you need to find referrals for services such as housing, food banks, or transportation.

1.4 Tips and Tricks

Each section of this manual contains step-by-step examples for performing common tasks in the application, along with descriptions of the screens and their functions.

The present topic is designed to supplement the Help topics for individual ARIES Client screens. Here, you'll find tips and tricks for using the features of ARIES Client more effectively.

Other helpful topics on using ARIES:

- [Menus](#)
- [Keyboard Shortcuts](#)
- [Logging into ARIES](#)
- [Printing](#)
- [Copying and Pasting into Word](#)
- [Importing into Word](#)
- [ARIES Buttons](#)
- [Tips for collecting CD4 and Viral Load counts](#)
- [ARIES Client Data Share Rules](#)

ARIES Menu Bar

When referring to the selection of menu items from the [ARIES menu bar](#), this manual uses terms like "Choose the **Find > Client** menu item." To perform the action in this example, do the following:

1. Move the cursor to the Find menu option. When your cursor rolls over "Find," a menu drops down, presenting all the available choices.
2. Move your cursor down to the "Client" option and click your mouse to select the item.

Entering Data in ARIES Fields

The ARIES field types provide several input options for the forms on a screen. Here are tips for successful data entry.

Field Types

Subject	Tip
Dropdown list	<p>A single-line form item with a gray box on the right of it. Clicking the box opens up a list of possible choices. Moving your cursor through the list and clicking an item selects that choice.</p> <p>You may use the scroll wheel to move through the options in a dropdown list.</p>
Date field	<p>In ARIES, a date field can be completed by entering text or by using a calendar popup. If you enter text, you must include forward slashes (/) in the text fields. Example: 10/25/2010.</p>
Service End Dates fields	<p>If you enter a certain number of days and click Save, ARIES will enter one service for each day within the date range. Example: If the date range is five days, five service records will be entered. Services must occur on consecutive days; i.e., services cannot skip days. This feature assists with batch service data entry.</p>
Money field	<p>When entering money fields, do not enter the dollar sign. ARIES will supply them after your input.</p>
Text field	<p>A text field is an input box that accepts a single line of text. Click within the box and enter text as appropriate.</p> <ul style="list-style-type: none"> • When entering a phone number or Social Security Number, include hyphens. Example: 555-55-5555. • After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345.
Text box	<p>An input box that accepts multiple lines of text. Click within the box and enter text as appropriate.</p>
Radio buttons	<p>Two or more small circles used to select a single choice between multiple options. Clicking one radio button selects that choice; clicking another selects the new choice instead.</p>

Checkbox	A square box used to select an option. Clicking a checkbox creates a checkmark inside it; clicking it again deselects the checkbox.
Scroll box	A list of text options. Clicking an item selects it. To select multiple items, hold down the control (Ctrl) key on your keyboard while clicking all the choices you wish to include.
Buttons	The ARIES applications provide a range of buttons to execute certain actions and to navigate among screens. As a reference for users, the Help section titled ARIES Buttons lists the most important buttons in ARIES Client, with examples of screens where they appear, and summarizes their actions.

Other ARIES Features

Subject	Tip
Search Filters	Most ARIES search screens present you with several filter options. For example, in a client search, your filters include first and last names, middle initial and date of birth. Keep in mind that the more filters you add, the narrower your search results. Conversely, if you leave all filter fields empty, ARIES will return all records that pertain to the search.
Red Asterisks for Required Fields	On many ARIES screens, fields marked with a red asterisk (*) are required fields, i.e., a value for the field must be entered before you can save the form. An error message appears if you try to save the form without making an entry in a required field. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.
Text Popups	Certain key terms in ARIES Client Help are linked to text boxes to provide brief definitions. You can click on the link to show the text box. Clicking the link again closes the text box. Example: On several Help pages, the first instance of "URN" (Unique Record Number) is linked to a text box with definition.
If you click "New" Accidentally	To delete a new record you've entered by accident, click Cancel . If you click Save , you will save the new record and you may need your ARIES support source to delete it.
Logging in with more than one browser	Log into ARIES using only one browser at a time; otherwise the first browser you used will log out.
Using the Deactivate Button	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.

<p>Sortable Column Headings</p>	<p>Many of the tables in ARIES have sortable column headings. When you click on a white text column heading and the color changes to yellow, with an underline, you will know that you are selecting this column to sort by. If the column heading is a date, the sort will be between most recent date first and the last date first, depending on the number of times you click the heading. If the heading is a word, the sort will be A to Z or Z to A, depending on the number of times you click the heading.</p>
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1.5 Security and Access

ARIES employs multiple layers of security measures to protect client data, including three-tier hardware, multiple firewalls and system intrusion-detection tools. Each user has a unique login and password to access ARIES. In addition, each computer must have a separate digital security certificate installed on it for every user who accesses the system. The ARIES web servers and databases are also protected by firewalls to prevent unauthorized access. Please note that ARIES has been developed to disallow the preservation of passwords between sessions. This means that your browser will not allow you to save your password for the next login.

If a hacker should break through all three firewalls to get at stored data, they would not be able to read client data, because it is encrypted. In ARIES, encryption is also used to secure communication over the Internet; secure files used by SQL Server; secure ARIES client IDs and user passwords; secure database connection strings; secure client identifiers in the database.

Administrators can customize individual users' permissions for access to each sector of ARIES. This allows all members of staff to use ARIES while controlling access to the system and preserving client trust.


Depending on your permissions, you may not see all the functions referenced in this manual and the ARIES forms may have fields that are grayed out and inaccessible to you. To have your permissions changed, contact your supervisor or ARIES support provider.










For security purposes, ARIES tracks the viewing of client data on read-only screens as well as the date/time/source/user of all edits to the database.

1.6 ARIES Buttons

The ARIES applications provide a range of buttons to execute certain actions and to navigate among screens. As a reference for users, the table below lists the most important buttons in ARIES Client, with examples of screens where they appear, and summarizes their actions. Those actions are also detailed on Help pages for the applicable screens.



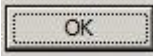







Note: Your level of permissions determines whether you can see a given button.











Button	Description
	<p>This button is used to add a subservice to a secondary service for an agency. You will see it on the read-only Agency Subservices Edit screen.</p>

	<p>This button is used to leave a screen without saving your changes. For example, you will see this button on all Edit screens.</p> <p>An alternative use for the Cancel button is as follows: If the ARIES menu bar does not appear in a screen, you must click either the Save or the Cancel button to proceed, Cancel's function being somewhat similar to that of a back button.</p>
	<p>This button is used to access the Staff Change Password screen. You will see this button on the Staff Detail screen.</p>
	<p>This button is used to change the program enrollment status of a client. You will see this button on the read-only tabs for many programs.</p>
	<p>This symbol appears at the top of many screens to indicate an important message regarding the client. Hovering your mouse over this button reveals the message about the client.</p>
	<p>This button is a time-saving device for copying details of an old contract into a new contract, which can then be edited. You will see this button on the Contracts Edit screen.</p>
	<p>This button is used to create a new client record and start the intake process, once a search has revealed that no client record currently exists for the individual. This button appears on the Client URN Search screen when you tab through each field and all of the information entered is correct.</p>
	<p>This button appears after creation of a new agency. It is used to display the Staff Edit screen to assign an administrator for the new agency. You will see this button on the Agency Info tab if no administrator has been created.</p>
	<p>This button appears when there are no matches for a search on the Client Search screen. It is an alternative to broadening the original search. You may click the Create New Client button to begin the intake process.</p> <p>Note: The Create New Client button is not visible to users in Admin Agencies or Partner agencies.</p>
	<p>This button is used to deactivate a specific client record. It does not deactivate the client in ARIES. For example, you will see this button on Eligibility Document Edit screen and the Barriers to Care Assessment screen.</p>

	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p>
<p>Display</p>	<p>This button is used to set the number of search results displayed on an ARIES screen. For example, you will see this button, along with a window to type the number of records to be displayed, on the Agency Search Results screen and the Staff Search Results screen.</p>
<p>Display Order</p>	<p>This button is used to access the Change Display Order screen, where you may set the display order on a reports menu. For example, you will see this button on the bottom of the Client Reports and Management Reports menus.</p>
<p>Done</p>	<p>This button is used to save data and return to the previous tab. For example, you will see this button on the Agency Site screen and the Contracts Edit screen.</p>
<p>Download</p>	<p>This button is used to open or save a download file. You will see this button on the Export Report Results screen.</p>
<p>Edit</p>	<p>This button is used to access a page where you can edit or update a client's records. You will see this button on many Edit screens and on read-only screens displaying previously entered records.</p>
<p>Edit Permissions</p>	<p>This button is used to access the Staff Permissions Edit screen. You will see this button on the Staff Detail screen.</p>
<p>Edit Relationship</p>	<p>This button is used to edit the relationship between a related/affected individual and the client. You will see this button on the Living Situation tab.</p>
<p>Edit Services</p>	<p>This button is used to edit services under a contract. You will see this button on the Contract Edits screen.</p>
<p>Enroll</p>	<p>This button is used to enroll a new client in a program. For example, you will see this button on the read-only CARE/HIPP and HOPWA screens if the client is not already enrolled. For clients enrolled in a given program, a Change Status button generally displays instead.</p>
<p>Exclude Previous Ignores</p>	<p>This button initiates a search for client records, using the selected match rules, in the Duplicate Merge function. Any records previously marked as ignored are not displayed. You will see this button on the Duplicate Merge Match Rules screen.</p>

	<p>This button is used to export your data to a file for import into another application. For example, you will see this button on Report Results screens and the Medical History Flowsheet Setup screen.</p>
	<p>This button is used to create a new Medical History Flowsheet. You will see this button on the read-only Medical History tab.</p>
	<p>This button is used to hide a report from view. For example, you will see this button on the Reports Display Order screens for Client Reports and Management Reports.</p>
	<p>This button is used to ignore a record match in Duplicate Merge so that it will not be displayed in the future when you click the Exclude Previous Ignores button. You will see this button on the Duplicate Merge Client Records Match screen.</p>
	<p>This button is used to initiate a search for client records and displays all record matches, including records previously marked as Ignored. You will see this button on the Duplicate Merge Match Rules screen.</p>
	<p>This button is used to merge two client records. You will see this button on the Duplicate Merge Client Records Match screen.</p>
	<p>This button appears when there are too many rows of data on a read-only page to fit onto a single screen. You can click the button to display additional rows.</p> <p>For example, the More button appears on the read-only Services screen for a client for whom more than one screenful of services is recorded.</p>
	<p>This button is used to add new records of several kinds from read-only or Edit screens. For example, you will see this button on the read-only Living Situation screen and the Living Situation Edit screen when they display previously entered records.</p>
	<p>This button is used to create a new agency. For example, you will see this button on the Agency Search screen when a search has yielded no results.</p>
	<p>This button is used to search again using new criteria. For example, you will see this button on the Agency Search Results screen and the Staff Search Results screen.</p>

	<p>This button is used to create a new staff member. You will see this button on the Staff Search Results screen when a search has yielded no results.</p>
	<p>This button is used to proceed to the next screen in a workflow. For example, you will see this button on the Duplicate Merge screen and the Funding Sources Edit screen.</p>
	<p>This button is used to confirm an action when you are prompted to do so. For example, when you click the Cancel button to discard screen entries, the OK button is displayed on a confirmation prompt.</p>
	<p>This button appears when two users from the same agency are trying to edit data for the same record. It allows the second user to override the lock and edit data on the same record at the same time.</p> <p>Caution! Since changes can be lost when two users are editing at the same time, it is best to wait until the other user has finished editing.</p>
	<p>This button is used to discard your percentage increase and return to the previous page on the Service Allocation by Contract: Allocate screen.</p>
	<p>This button is used to see the details of the QM Client Follow-Up Report. For example, you will see this button on the Summary Report HAB QM Indicator screen.</p>
	<p>This button is used to discard your percentage entries and return to the previous screen to reallocate your percentages. For example, you will see this button on the Service Allocation by Contract: Finalize screen.</p>
	<p>This is an optional button. It is used to complete the HOPWA rent worksheet at the time of data entry. For example, you will see this button on the HOPWA Housing and Income Assessment Part 3 screen.</p>
	<p>This button is used to access the Report Results screen. For example, you will see this button on the Needs Assessment screen and the Crosstab Wizard screen.</p>
	<p>This button is used to save your input and return to the previous screen. For example, you will see this button on the Eligibility Documents screen and the Staff Assignment Edit Screen.</p> <p>An alternative use for the Save button is as follows: If the ARIES menu bar does not appear in a screen, you</p>

	must click either the Save or the Cancel button to proceed.
	This button is used to save your input and create another data line item, which is useful when you are entering large amounts of service data. For example, you will see this button on the Service Edit screen.
	This button is used to save your input and return to the previous screen. For example, you will see this button on the Risk Factors Edit screen, the Contact Information Edit screen and the Staff Edit screen.
	This button is used to assign and save services to contracts and prevent further editing. Use of this button is final and non-reversible. For example, you will see this button on the Service Allocation by Contract: Finalize screen.
	This button is used to save your input and advance to the next screen. For example, you will see this button on the Risk Factors Edit screen, the Agency Specifics screen and the Staff Edit screen.
	This button is used to enter test results for a client service. For example, you will see this button on the TMP Edit screen.
	This button is used to search for a specific client or staff member in your agency. For example, you will see this button on the Staff Search screen and the Client Search screen.
	This button is used to unhide a report so that it is available to view. For example, you will see this button on the Reports Display Order screen.
	This button is used to finalize data. For example, on the Case Notes Edit screen, use this button to finalize the data and make it available to other agencies for Share clients. On the Contract Allocation and YTD Expenditure screen, use this button to save the report and make it no longer editable.
	This button is used to display your results in a screen formatted for printing without the ARIES toolbar. For example, you will see this button on the Case Notes screen.
	Selecting the 'Undo Merge' button to undo two merged records. 'Undo Merge' will return BOTH records to the state they were in at the time of the merge. Any edits

that have been made to the merged client will be lost (deactivated) by performing an 'Undo Merge'.
--

1.7 The ARIES Applications

ARIES has four separate applications that work in conjunction with one another.

- **ARIES Client**, commonly referred to as ARIES, is the main application where staff persons enter, search, edit, and generate reports from records. The other three support applications allow Administrators to customize and perform maintenance on ARIES.
- **ARIES Report Export** allows Administrators to define custom reports, and to export ARIES data in a variety of formats (including XML) for inclusion in other applications.
- **ARIES Import** is used by Administrators to bring data into ARIES from other sources. ARIES Import accepts XML files, checks them for validity, and then inserts or updates the database with the data.
- **ARIES Administration** - is the application that Administrators use to monitor and control ARIES activity, as well as customize ARIES edit screens. Administrators can oversee users and groups, design reports, customize data entry, troubleshoot problems, and perform maintenance.

1.8 Getting Started

Your ARIES administrator will typically configure ARIES for you on your computer. To run ARIES, the minimum client system requirements are:

- Internet Explorer 7.0 or above; JavaScript and cookies must be enabled.
- ARIES now supports the use of Chrome and Edge browsers. ARIES will be temporarily supporting IE browser versions IE7-IE10 until all users are on IE11, Chrome or Edge.

Important Note: Microsoft is no longer supporting older versions of Internet Explorer, which includes IE7 - IE10. If you attempt to log on from Internet Explorer 7.0-10.0, you will receive the message "The browser version you are using to access ARIES will no longer be supported as of 4/1/2016. You must upgrade to IE11, Chrome X.X, or Edge X.X prior to that date if you wish to continue using ARIES."

IF you are using IE11 and you receive the browser alert message, turn off compatibility mode and the message will go away.

- Windows XP or above.
- Pentium processor.
- 256 MB RAM.
- 1.5 GB available space on hard disk.
- Access to the Internet via T1, DSL, cable modem, or satellite connection that allows secure sockets layer (SSL) communication.

Note: Access with a 56 kb modem will provide a less satisfying user experience.

You will be given a login and password by an ARIES administrator. If you choose your own password, it must be 6-32 characters long. It must include:

- At least one upper case character.
- At least one lower case character.
- At least one number.
- At least one special character (except for the \$, %, ^, and *).

As a security measure, passwords typically have a lifespan of six months. After six months, ARIES will prompt you to [change your password](#).

You must also have a security certificate installed on your computer. A certificate is a small file that allows you to connect securely to ARIES using the SSL (Secured Sockets Layer) protocol. The security certificate is installed by an ARIES administrator.

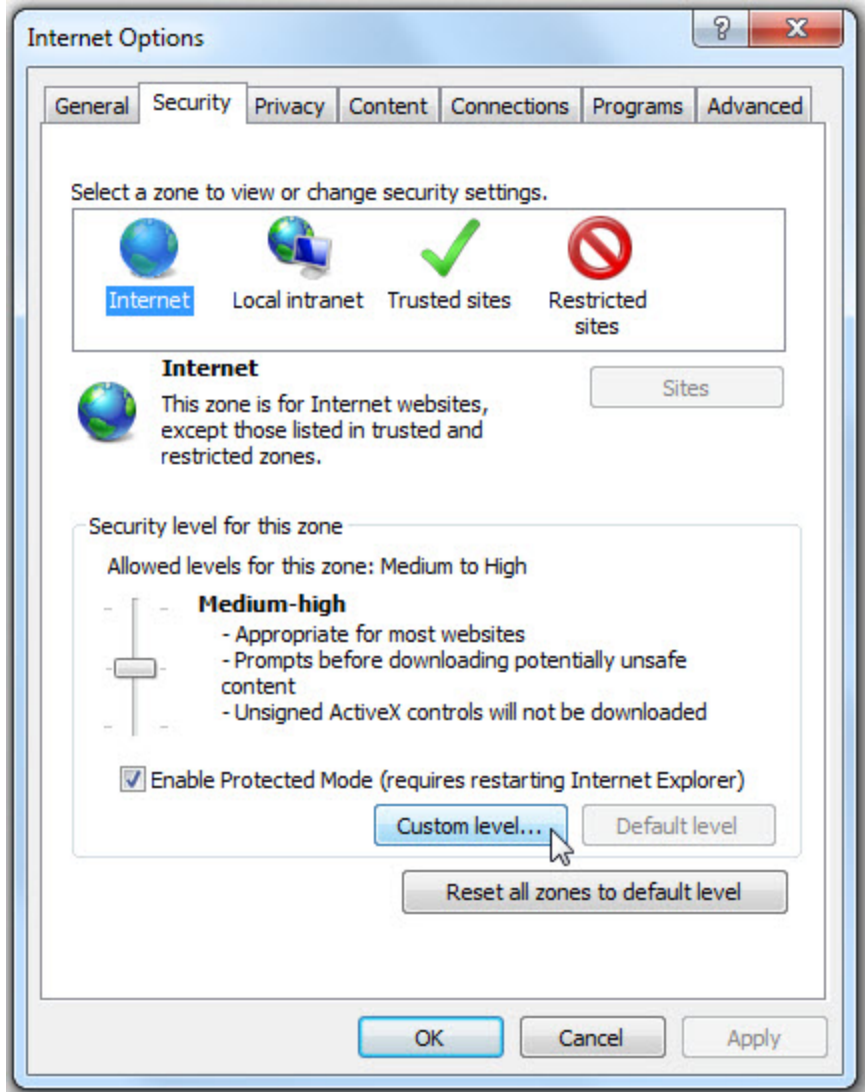
Note: To successfully log in to ARIES, you must have JavaScript, cookies and popups enabled. Otherwise you will receive error messages upon ARIES login.

1.9 Browser Settings

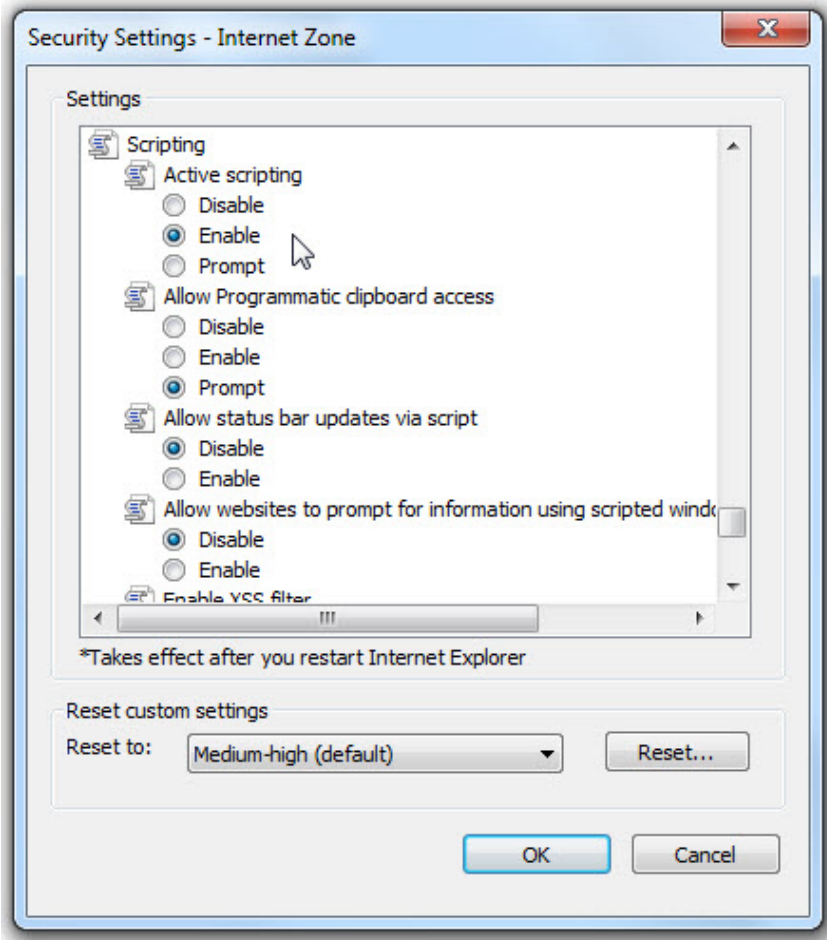
This section presents steps for configuration of your browser to run ARIES. ARIES uses cookies to maintain your login session. ARIES also uses JavaScript (Active Scripting) to add functionality to forms and buttons.

To adjust your Internet Explorer settings:

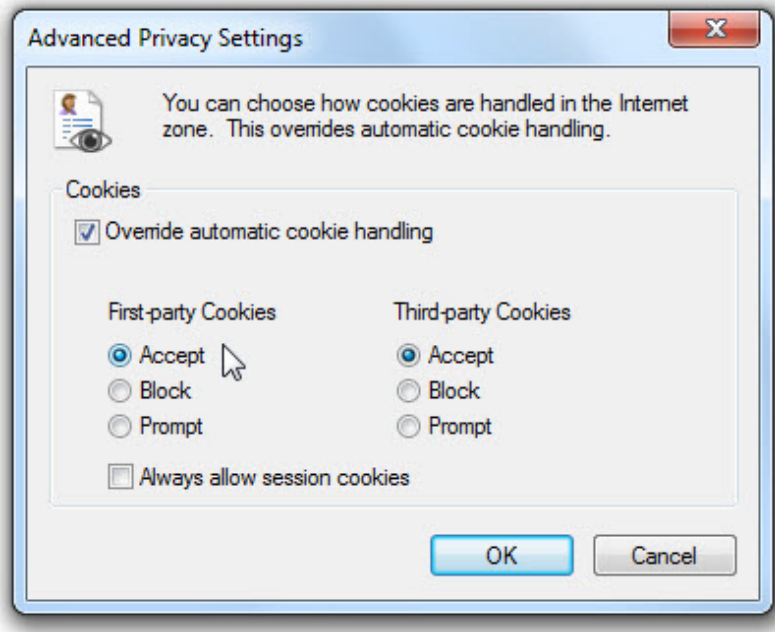
- Select **Tools > Internet Options**. When the dialogue box appears, select the Security tab, and then click the Custom Level button.



- The "Security Settings - Internet Zone" dialogue appears. Scroll down the Settings list until you reach Scripting.



- Under Active scripting, make sure the **Enabled** radio button is selected.
- Click **OK**.
- Click on the Privacy tab of the Internet Options dialogue to check your cookie settings.
- On the Privacy tab, click the **Advanced** button and then click the "Override automatic cookie handling" checkbox.



- Set your browser to accept first-party and third-party cookies by selecting the **Accept** radio buttons.
- Click **OK**.

Make sure your computer has the proper digital security certificate installed. Digital certificates are used as an extra layer of security to prevent access by unauthorized computers, and to encrypt data to and from the web server.

Note: If you have access to ARIES from multiple computers, each computer must have a separate security certificate installed on it by an ARIES Administrator.

1.10 Logging into ARIES

After you are set up as an ARIES user, you will be given a URL link that allows you to connect to ARIES. Adding this link to Favorites in Internet Explorer will give you easy access to the URL for future logins.

Reminder: To successfully log in to ARIES, you must be running Internet Explorer 7.0 or higher; and you must have JavaScript, cookies and popups enabled. Otherwise you will receive error messages upon ARIES login.

ARIES now supports Chrome and Edge browsers and Microsoft is no longer supporting older versions of Internet Explorer, which includes IE7 - IE10. If you log on from Internet Explorer 7.0-10.0, you will receive the message "**The browser version you are using to access ARIES will no longer be supported as of 4/1/2016. You must upgrade to IE11, Chrome X.X, or Edge X.X prior to that date if you wish to continue using ARIES.**"

IF you are using IE11 and you receive the browser alert message, turn off compatibility mode and the message will go away.

Important:

If you are logged into ARIES in one browser window and you attempt to log into ARIES again in a second browser window, you will receive the message "You are already logged in. If you continue your existing session will be logged out."

If you continue to log into ARIES in the second window, the first window will no longer function. The same message will appear if you close an ARIES browser window without logging out first, and then attempt to log back into ARIES. To prevent this message from displaying, never try to open more than one ARIES browser window at a time, and always log out of ARIES before closing the browser window.

When you browse to the ARIES URL link, you will be prompted to select your digital certificate for ARIES. After you select your digital certificate, the ARIES Login screen appears.

- Enter your login ID. Your login ID *is not* case-sensitive.
- Enter your secure password. Your password *is* case-sensitive.
- Select the radio button for **ARIESClient**.
- Click the **Login** button.
- Your default Home Page with Menu Bar displays.

Note: If your computer does not have a security certificate installed, or you experience any kind of problem logging in, contact your supervisor or ARIES support provider.

To Change Your Default Home Page:

From the [Staff Edit](#) screen:

- Click on the Home Page dropdown.
- Use the Home Page dropdown to select your new default home page screen from the list by clicking on the new default.
- Click **Save** to save your new default Home Page screen.

1.11 Menus

The ARIES menu bar, which appears on the top of many screens, is used to navigate to different screens in ARIES. The menu bar is not visible if you are filling out a form that must be saved or cancelled before you proceed. If the ARIES menu bar does not appear in a screen, you must click either the **Save** or the **Cancel** button to proceed.



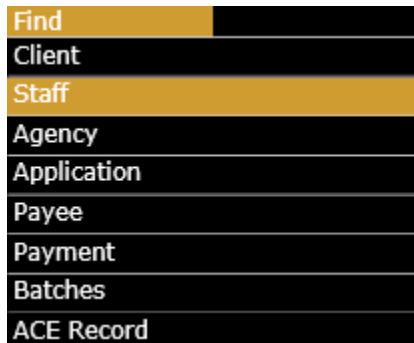
ARIES Menu Bar Buttons

The **Back** button on the left of the menu bar allows you to navigate to ARIES screens you have previously visited. Use this button instead of your browser's back button, as your browser's back button is not supported in ARIES applications. The Internet Explorer history feature often causes edit locks if you are editing a form and you use the browser's back button without saving or canceling.

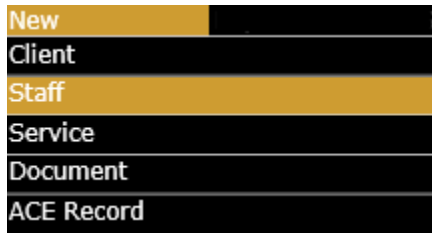
The **Home** button takes you to your selected home page. You can set your home page in the [Staff Edit](#) screen.

ARIES Menus

The **Find** menu, depending on your selection, brings up a search page for Client, Staff, or Agency.



The **New** option allows you to create new Client, Staff, Service Line Item, and Document records in ARIES.

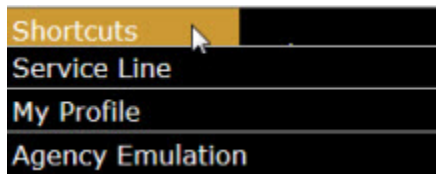


The **Reports** menu provides shortcuts to the reports pertaining to clients, services, finance, management, compliance, and Insurance Assistance Services (IAS), as well as the option to jump to the Cross Tab Wizard for producing simple ad hoc reports.

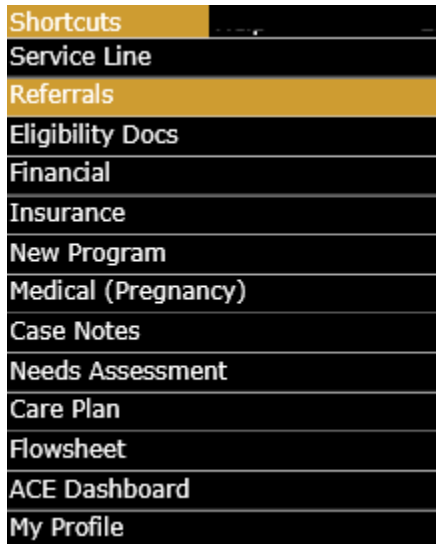


The **Shortcuts** menu offers the ability to jump immediately to a number of different places, depending on your permissions. If you are not in a client record but, Shortcut options may

include the Service Line Item screen of ARIES, or to your ARIES user profile, or to Agency Emulation, or to the ACE Dashboard.



From within a Client record, the Shortcuts options are extensive and permission based. The specific permissions required for each Shortcut items are detailed in the section on [Special Notes on Selected Permissions.](#)



The **Help** menu provides access to the help system and to a help page that summarizes ARIES history and displays the current version number of the applications.



Selecting **Logout** will log you out of ARIES and take you back to the login screen.

1.12 Keyboard Shortcuts

Data entry staff may use ARIES to enter large amounts of service data. To speed up this work, ARIES provides keyboard shortcuts.

Every Edit screen has a default button that is colored gold; pressing the **Enter** key on the computer's keyboard is equivalent to clicking the gold button. For example, in the Staff Detail screen, the **Edit** button is in gold; pressing the **Enter** key takes you to the Staff Edit screen.

Every edit screen includes a **Cancel** button, which, when clicked, leaves the screen without saving any changes. The **Esc** key is a keyboard shortcut for the **Cancel** button.

For repetitive data entry - for example, entering large amounts of Service data - some Edit screens display a button labeled **Save + Another**. Pressing this button saves all the current values and brings up a new screen pre-filled with the same values. At the bottom of the

screen, the values are listed in a read-only table. Example: When entering service line items for a group therapy session of clients, click **Save + Another** after entering the data for the first client. An identical screen appears. Then enter the name of the next client in the group and click **Save + Another** until all the clients are entered.

The table below lists the other keyboard shortcuts.

Keyboard Shortcut	Action
Ctrl+Shift+D	Auto-enter today's date stamp (format MM/DD/YYYY) in a text field.
Ctrl+Shift+S	Go the Client Search screen from any ARIES Client screen.
Ctrl+Shift+C	Go to the Cross Tab Wizard screen from any ARIES Client screen.
Ctrl+Shift+M	Go to your own Staff Detail screen (This shortcut is equivalent to "My Profile" on the Shortcuts dropdown).
Ctrl+Shift+P	Go to the MCWP tab under Programs.*
Ctrl+Shift+R	Go to the Client Reports menu.
F1	Open an online Help page for the ARIES application screen you're viewing.

* Keyboard shortcuts marked with an asterisk are only available after a client has been found.

Reminder: The **Back** button on the left of the [ARIES menu bar](#) allows you to navigate to ARIES screens you have previously visited. Use this button instead of your browser's back button, as your browser's back button is not supported in ARIES applications. If the ARIES menu bar does not appear in a screen, you must click either the **Save** or the **Cancel** button to proceed.

Help Topics

If you need to access Help, you can press the **F1** function key to open up the help window. Because this function is context-sensitive, it will bring up help for the screen you are on. If you are using a pop-up window blocker with your browser, this function may not work correctly. In this case, you can either disable the pop-up blocker to view the help, or choose Help > Help Topics from the Menu bar.

1.13 Client Tab Bar

The Client screens, which contain information for the client such as contact information, medical history, and program information, are frequently used by case managers and intake personnel. A series of tabs on both the upper and lower bars helps to navigate through the Client screens by displaying a specific section when a tab is clicked.

Don Juan A Madi.Garci

Program Summary

Program	Status	Date	Agency	Client ID	Staff	Reason
CARE/HIPP	Inactive	5/11/2009	STS	CH2IT	Nancy McCampbell	29 months exhausted
CARE/HIPP	Inactive	5/10/2009	STS	CH2IT	Nancy McCampbell	29 months exhausted

Staff Assignment [Edit](#)

[Roberta Van Dyke](#) [Nancy McCampbell](#) [Betty Blake](#) [Mike O'Mara](#)

Other Staff 1: Allison Edwards: Receptionist (510-650-2168) @College Clinic of Oakland
Other Staff 2: David Garcia: Medical Doctor (510-389-8609) @Oakland Clear View Mission
Other Staff 3: Zola Biggs: Medical Doctor (510-736-8284) @United Ministries of Alameda

Upper Tab Bar

The upper tab bar contains all the client sections, e.g., Demographics, Eligibility, Programs, Medical, Medications, Risk & Assessments, Care Plan, Case Notes, and Services. Example: Clicking the Programs tab brings up a summary of the client's programs.

Lower Tab Bar

The lower tab bar contains a set of tabs for more detailed screens, allowing you to focus on specific programs within the section selected on the upper tab bar. Example: To update the client's Medicare Part D record, click on the Medicare Part D subtab under Programs.

To return to the initial Programs view for a client, click the Program Summary tab.

Read-Only vs. Edit Screens

Each subtab (tab in the lower bar) has a read-only screen and a corresponding edit screen. Read-only screens display information previously entered on an edit screen. Edit screens are where users add or edit client data.

The **Edit** buttons on the read-only screens are only available to those with the appropriate permission levels.

1.14 Printing

Every screen in ARIES can be printed using the Internet Explorer print function. For greater control over formatting and layout, you can also:

- Save the screen in HTML
- Import the screen into a word processor
- Reformat the screen in the word processor
- Print out the results

For frequently printed screens such as reports, ARIES gives you the option to display the screen in a printer-friendly format by hiding the ARIES menu bar and possibly other information that is not necessary to the report in printed form (such as hyperlinks). When you have printed the page, use the browser's back button to restore the ARIES menu bar.

You can print in ARIES using any of the following methods:

- Using Internet Explorer
- Copying and pasting into Word
- Importing into Word

See the following sections for details on printing in each of the above methods.

- [Using Internet Explorer](#)

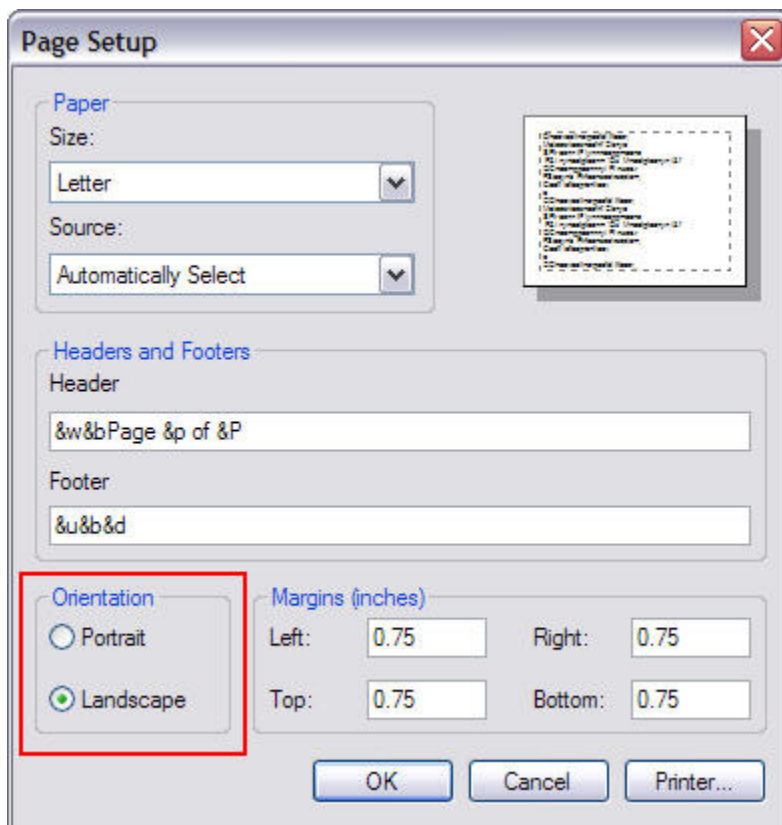
- [Copying and pasting into Word](#)
- [Importing into Word](#)

1.14.1 Using Internet Explorer

Every screen in ARIES can be printed using your browser's print function. For wider screens and reports, it is best to print in landscape document orientation, where the printed page is horizontal. This ensures that no data is cut off on the right hand side of the page.

To print in landscape using Internet Explorer:

- From the Menu bar, select **File > Page Setup**. The Page Setup dialog box will be displayed.
- In the Orientation section, select the **Landscape** radio button and then click **OK**.



- From the Menu bar, select **File > Print**. The Page Setup dialog box will be displayed.
- Select the printer you wish to print to and then click **Print**.

1.14.2 Copying and Pasting into Word

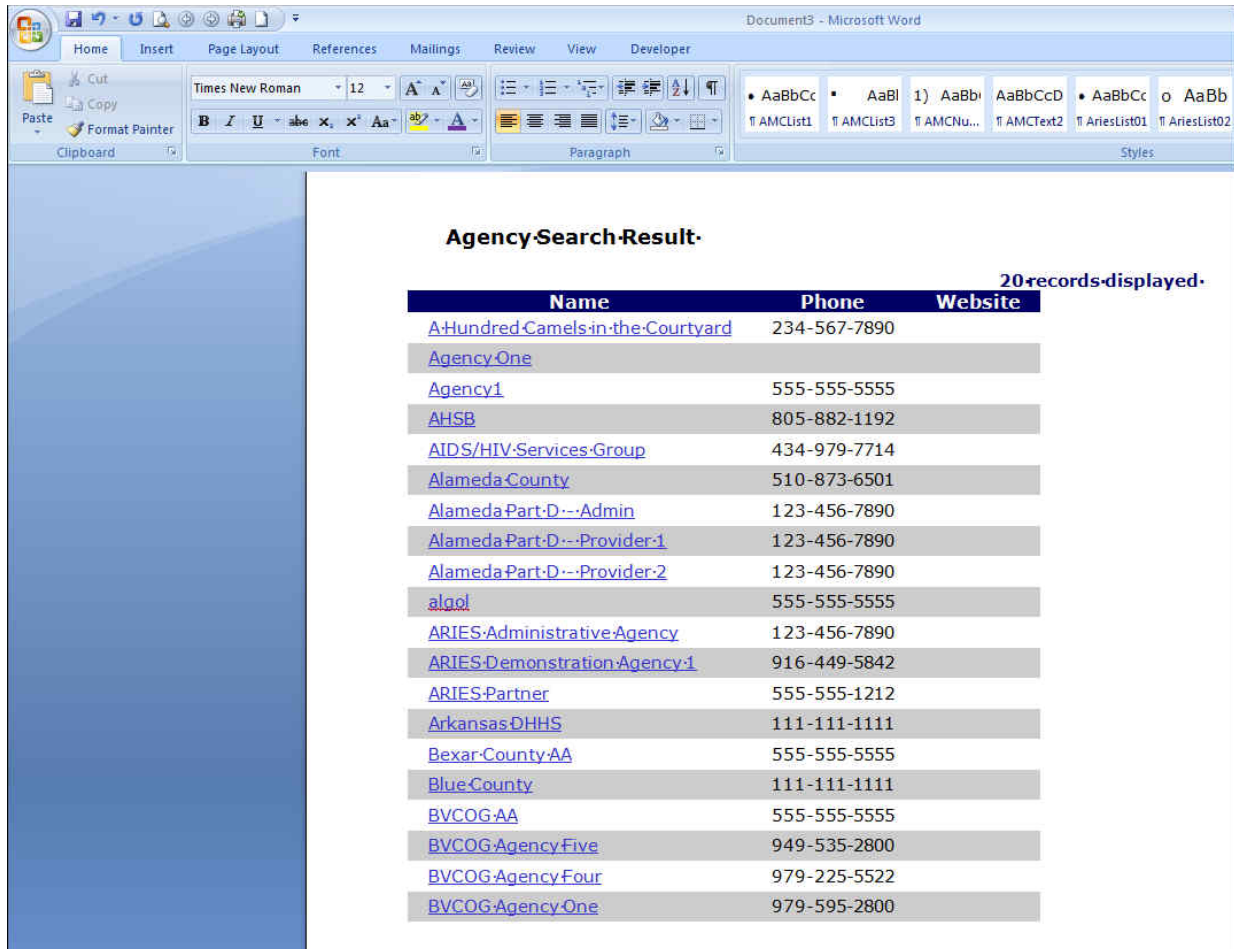
To quickly incorporate ARIES data into your documents and reports, you can copy and paste directly from your browser into Microsoft Word (version 2000 or higher).

Agency Search Result		
Name	Phone	Website
A Hundred Camels in the Courtyard	234-567-7890	
Agency One		
Agency1	555-555-5555	
AHSB	805-882-1192	
AIDS/HIV Services Group	434-979-7714	
Alameda County	510-873-6501	
Alameda Part D - Admin	123-456-7890	
Alameda Part D - Provider 1	123-456-7890	
Alameda Part D - Provider 2	123-456-7890	
alqol	555-555-5555	
ARIES Administrative Agency	123-456-7890	
ARIES Demonstration Agency 1	916-449-5842	
ARIES Partner	555-555-1212	
Arkansas DHHS	111-111-1111	
Bexar County AA	555-555-5555	
Blue County	111-111-1111	
BVCOC AA	555-555-5555	
BVCOC Agency Five	949-535-2800	
BVCOC Agency Four	979-225-5522	

- Use the cursor to highlight the text you wish to copy, as shown above.
- From the Internet Explorer Menu bar, select **Edit > Copy** (or press **CTRL+C**).
- Open or switch to your Microsoft Word document: From the Menu bar, select **Edit > Paste** (or press **CTRL+V**).
- The text copied from ARIES appears in your Microsoft Word document, as shown below, retaining its formatting and table structure. You can then use Word to format the document.

To print the document:

- From the Menu bar, select **File > Print**. The Print dialog box will be displayed.
- Select the printer you wish to print to and then click **Print**.



1.14.3 Importing into Word

To save an entire web page and import it into Word:

- From the Internet Explorer Menu bar, select **File > Save As**, and save the HTML page to your computer.
- Open or switch to your Microsoft Word document: From the Menu bar, select **Edit > Open**, and select the saved HTML page.
- The web page copied from ARIES appears in your Microsoft Word document. You can then use Word to format the document.

To print the document:

- From the Menu bar, select **File > Print**. The Print dialog box will be displayed.
- Select the printer you wish to print to and then click **Print**.

1.15 Sessions and Timeouts

If your ARIES session times out because of extended inactivity and you try to save data or navigate to another screen in ARIES, you will be prompted to log in again. After you enter the correct password, ARIES will return to the screen you were previously viewing. Timeouts

are a security feature to prevent unauthorized users from accessing ARIES if you step away from your computer.

Contact your ARIES support provider if you have questions.

1.16 Edit Locks

When two users attempt to enter data for the same record, ARIES uses an edit lock to prevent data loss. The user who accessed the record first is able to save their data.

Users from the Same Agency

If the two users are both within the same agency, the second user is informed of the identity of the first user editing the record via the following warning:



Overriding the Edit Lock

By clicking the **Override Lock** button, the second user has the option of overriding the lock and editing the record only if the first user is from the same agency.

Caution: If the lock is overridden and both users save their changes, then the edited data may be lost. It is recommended that the second user click the Cancel button and wait to enter new data until the user currently editing the record has finished.

Users from Different Agencies

If the record is being edited by a user at another agency with whom a client has agreed to share their data, then the user who encounters the edit lock does not have the option of overriding a lock. Nor will they know the identity of the user currently editing the record.

The second user is presented with the following warning:



Note: If you are editing a record and you exit the screen without clicking **Save** or **Cancel** (e.g., you use the browser **Back** button or close the browser window), the record will remain open and locked until your session expires after 8 hours or until you access the record again and save it.

To prevent this, avoid using the browser's back button, which is not supported in ARIES applications. Instead, use the [ARIES menu bar Back](#) button; or, if you are editing a record, click the **Cancel** or **Save** button to exit the screen.

1.17 ARIES Client Data Share Rules

Non-longitudinal Tables with Standard Share Rules

For shared clients, non-longitudinal client data tables contain a single record with an agency ID of 0, which is shared by all agencies where the client is enrolled. For non-shared clients, non-longitudinal client data tables contain a separate record for each agency where the client is enrolled (agencyID is never 0), and each record is visible and editable only by the agency that created it. AA or Partner agencies may view and edit non-longitudinal records for any client within a supervised agency, regardless of the client's share status.

Table Name	Edit Shared Record	View (ARIES Client)	View (ReportExport)	Notes
CareHipp	X	X	X	
ContactInfo / Address	X	X	X	Address has multiple keys within ContactInfo
Demographic	X	X	X	
Female	X	X	X	
Financial	X	X	X	
HOPWA			X	Table is a legacy, but is still viewable in ReportExport
Medical	X	X	X	
MedicarePartD	X	X	X	

Medication	X	X	X	
RiskFactor	X	X	X	
TB	X	X	X	

Non-longitudinal Tables that are Not Shared

These non-longitudinal tables are not shared. (AgencyID will never have a zero value). Data is not viewable or editable except by the agency that created it, or an AA or Partner agency who supervises the agency that created it.

Table Name
EIPPsycho-social

Longitudinal Tables with Standard Share Rules

For shared clients, most longitudinal tables are viewable in ARIES Client and in ReportExport by all agencies that serve the client, but only the agency that created the record or an AA or Partner agency who supervises the agency) can edit the record.

Table Name	View (ARIES Client)	View (ReportExport)	Notes
Acuity	X	X	
AIDSDefiningCondition	X	X	
ARTAdherence	X	X	
ARTMedication	X	X	
ARTTherapy	X	X	
CD4	X	X	
CMP		X	Legacy table, but still visible in ReportExport
DocumentLibrary	X	X	
EligibilityDocument	X	X	
HIVTest	X	X	
HospitalVisit	X	X	
HousingAssistance	X	X	
Immunization	X	X	

IncomeHistory	X	X	
Insurance	X	X	
OtherMedication	X	X	
PAPSmear	X	X	
Pregnancy	X	X	
Program	X	X	
STIHepatitis	X	X	
TBTreatment	X	X	
TMP		X	Legacy table, but still visible in ReportExport
ViralLoad	X	X	
Weight	X	X	

Longitudinal Tables that are Not Shared

These longitudinal tables are not shared. Data is not viewable or editable except by the agency that created it, or an AA or Partner agency who supervises the agency that created it.

Table Name	Notes
AgencySpecificsLog	This table is viewable only in ReportExport
Applicant	
ApplicantDataEntry	
ApplicantDataEntryGroup	
ApplicantNotes	
ApplicantPaymentInfo	
ApplicantPaymentInforTransaction	
ApplicantWorkFlowLog	
BarriersToCare	
Client_RelatedAffected	
Client_Staff	
Client_StaffOther	

ClientAce	
ClientAceLink	
ClientShareStatusLog	Logging table only. Not currently visible in ReportExport.
EIPBehavioral	
EIPFunctional	
HivTestAce	
MentalHealthTreatment	
PayeeBatchApplicant	
ReferralAce	
ServiceLineItemAce	
SubstanceAbuseTreatment	

Longitudinal Tables with Customized Share Rules

These are longitudinal tables which have variations on the 'standard' rules, above.

Table Name	View (ARIES Client)	View (ReportExport)	Notes
AgencySpecifics	X		Read-only page shows only Agency name and Status for shared records. Data is not shared in ReportExport.
CarePlan	X	X	Needs that are tagged as non-shared in NeedsAssessment.config are hidden. Data created prior to sharing is not visible on read only page, but is visible in ReportExport
CarePlanTask	X	X	Tasks which are child records to hidden CarePlan records are hidden. Data created prior to sharing is not visible.
CaseNote	X	X	Agency creating note may always see all notes but only Case Notes that are signed and sealed may be seen outside the agency, even by AA or Partner agencies. Hides CaseNotes of type Mental Health, Legal, Substance Use, Incident Report and any CaseNote with 'Do

			not share' check. 'Signed and Sealed' Case Notes created prior to sharing are not visible on Read only page, but are visible in ReportExport.
CaseNoteParagraph	X		Same rules as CaseNote, except paragraph text is not shown in ReportExport.
HopwaAssessment	X	X	Shows only Date, Staff, Applying for and Outcome on read-only page. ReportExport exposes all fields, but should exclude assessments where Living Situation contains mental health or substance abuse information. Data created prior to sharing are not visible on Read only page, but are visible in ReportExport.
HopwaHousehold		X	
HopwaStatus	X	X	Shows only Date, Staff, Program, Disenrolled. ReportExport exposes all fields.
HopwaWorksheet		X	
LivingSituationLog	X	X	Hides living situations of type 'Psychiatric Facility' and 'Substance abuse treatment facility'
NeedsAssessment	X	X	Needs that are tagged as non-shared in NeedsAssessment.config are hidden. Data created prior to sharing are not visible on Read only page, but are visible in ReportExport.
Referral	X	X	Hides referrals for Services that are tagged as non-shared in ServiceHierarchy.config. If the Refer To agency is another ARIES agency and the client is share and the record is share, the Refer to agency may edit Outcome data. Data created prior to sharing are not visible on Read only page, but are visible in ReportExport.
SamissAssessment	X	X	Results for 'Refer to Substance Abuse Treatment' and 'Refer to

			Mental Health Counseling' are hidden for shared records
ScreenMentalHealth	X	X	Outcome field is hidden for shared records
ScreenRiskReduction	X	X	Outcome field is hidden for shared records
ScreenSubstanceAbuse	X	X	Outcome field is hidden for shared records
ServiceLineItem	X		Shared services are not exposed in ReportExport

'Custom Data' Share Rules

In ARIES, you can create both non-longitudinal and longitudinal 'virtual tables' (custom data) via the Agency Utilities menu. Share rules differ, depending on what level of agency created the structure of the virtual tables. Client custom data is entered via the 'Custom Data' tab. Note: In ReportExport, a virtual table 'Custom Data Entry Group' table is used, which combines CustomDataEntry and CustomDataEntryGroup into a single virtual table.

Agency level where Custom Data Created	Table Name	Edit Shared Record	View (ARIES Client)	View (ReportExport)	Notes
Partner / AA	(Non-longitudinal) CustomDataEntry, CustomDataEntryGroup	X	X	X	When defined at the Partner/AA level, custom data is shared for all agencies supervised by the AA/Partner.
Partner / AA	(longitudinal) CustomDataEntry, CustomDataEntryGroup		X	X	When defined at the Partner/AA level, custom data is shared for all agencies supervised by the AA/Partner.
Provider	(Non-longitudinal) CustomDataEntry, CustomDataEntryGroup				When defined at the Provider level, custom data is <u>non-shared</u>
Provider	(longitudinal) CustomDataEntry, CustomDataEntryGroup				When defined at the Provider level,

					custom data is <u>non-shared</u>
--	--	--	--	--	-------------------------------------

Section 2

2 Clients

Clients are individuals who receive services from your agency. These services may include items such as medical care, housing, counseling, and meals. Clients may be HIV; they may also be related to, or affected by persons with HIV (family members, dependents, or roommates) who may be eligible for services like housing assistance and transportation.

Each client is recorded in ARIES by intake personnel as part of the client enrollment process. Client records contain information such as how to contact them, their demographic and medical information, and services provided to them.

Uses of Client Information

- Intake - Enroll new clients and enter their records.
- Case Management - Complete assessments, create care plans, enter case notes, make referrals, associate clients with services.
- Service Providers, Clinicians - Access schedules and enter client notes, approve treatment plans.
- Agency Management - Generate reports to track costs, services, reimbursements, and grant writing.
- Research - Evaluate programs, analyze aggregate reporting and data while maintaining client confidentiality.

Sharing Client Data with Other Agencies

If a client gives permission, their data may be shared with other agencies. This allows the client to access services at other agencies without going through the enrollment process again. Sharing data with other agencies gives the staff at each agency a better overall view of the client's case, thus providing the most appropriate services.

Client data is available to be shared, but it is not actually shared until the client gives an agency the "keys" to unlock his/her data. The keys are: first name, middle initial, last name, date of birth, gender, and mother's maiden name. These variables are used to generate clients' [Unique Record Numbers](#) (URN).

If a client goes from non-share to share, all of his/her data elements will be shared, with the exception of certain types of case notes. These non-shared case notes are: legal, substance abuse, mental health and incident reports.

Entering Client Information

Since many staff persons access client records, it is important that all information entered is correct. Incorrectly entered information not only affects reports, but may prevent clients from receiving the services they need.

You can perform a variety of actions on the Client Screens, such as looking up a client, creating a new client and recording a service for a client. Click below for procedures on:

- [Looking Up a Client](#)
- [Creating a New Client](#)
- [Recording a Service for a Client](#)
- [Running a Client Detail Report](#)

The client screens also include:

- [Client Search](#)
- [Client Search Result](#)
- [Creating Clients](#)
- [Demographics](#)
- [Eligibility](#)
- [Programs](#)
- [Medical](#)
- [Medications](#)
- [Risks and Assessments](#)
- [Care Plan](#)
- [Case Notes](#)
- [Services](#)
- [Custom Data](#)

2.1 Looking Up a Client

- From the [ARIES menu bar](#) at the top of the ARIES screen, select **Find > Client**. The Client Search screen is displayed.

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"/>	
First Name	<input type="text"/>	
Middle Initial	<input type="text"/>	
Client ID	<input type="text"/>	
SSN	<input type="text"/>	123-45-6789
Phone	<input type="text"/>	123-456-7890
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 >"/>		

Search Filters

You may search for any client registered at your agency. You can limit the search results by using one of the following filters: Name, agency client ID, Social Security number, date of birth, or by related/affected individuals.

Most ARIES search screens present you with several filter options. For example, in a client search, your filters include first and last names, middle initial and date of birth. Keep in mind that the more filters you add, the narrower your search results. Conversely, if you leave all filter fields empty, ARIES will return all records that pertain to the search.

To Search by Client Name

Last Name - Enter the client's last name.

First Name - Enter the client's first name. Do not use middle initial in the First Name field, e.g., "Mary J."

Middle Initial - If available, enter the client's middle initial.

If you are unsure of the spelling of a name, you can try using the wildcard "*" (asterisk). Example: If you enter "Mac*" in the last name field, the search will return all last names and all "Also Known As" names that begin with "Mac."

Click the **Search** button. The results appear in the Client Search Results screen.

If no clients match, then the Client Search screen redisplay, giving you an opportunity to broaden your search.

If only one client matches your search criteria, ARIES takes you directly to that individual's Contact Information screen. If the record does not match the client you are searching for, the Client Search screen redisplay, giving you an opportunity to search again with more detailed information.

If multiple matches are found, you are taken to the Client Search Result screen (displayed under the Client Search Results section below), which lists all clients who match your search. If none of the results match the client you're searching for, click **New Search** to search again with more detailed information.

To Search by Agency Client ID

Enter any of the client's identification numbers in the Agency Client ID text field. Agency client IDs are unique identifiers assigned by your agency or by specific programs.

Click the **Search** button. The results appear in the Client Search Results screen.

If only one client matches your search criteria, ARIES takes you directly to that individual's Contact Information screen. If the record does not match the client you are searching for, the Client Search screen redisplay, giving you an opportunity to search again with more detailed information.

If multiple matches are found, you are taken to the Client Search Result screen (displayed under the Client Search Results section below), which lists all clients who match your search. If none of the results match the client you're searching for, click **New Search** to search again with more detailed information.

To Search by Social Security Number

Enter the Social Security Number (SSN) using the format 123-45-6789.

Click the **Search** button. The results appear in the Client Search Results screen.

If only one client matches your search criteria, ARIES takes you directly to that individual's Contact Information screen.

If no clients match, then the Client Search screen redisplay, giving you an opportunity to broaden your search.

To Search by Phone

Enter the Phone Number using the format 123-456-7890.

Click the **Search** button. The results appear in the Client Search Results screen.

If only one client matches your search criteria, ARIES takes you directly to that individual's Contact Information screen.

If no clients match, then the Client Search screen redisplay, giving you an opportunity to broaden your search.

To Search by Date of Birth

Enter the Date of Birth using format MM/DD/YYYY. Example: To specify a DOB of September 27, 1968, enter, "9/27/1968."

Click the **Search** button. The results appear in the Client Search Results screen.

If only one client matches your search criteria, ARIES takes you directly to that individual's Contact Information screen. If the record does not match the client you are searching for, the Client Search screen redisplay, giving you an opportunity to search again with more detailed information.

If multiple matches are found, you are taken to the Client Search Result screen (displayed under the Client Search Results section below), which lists all clients who match your search. If none of the results match the client you're searching for, click **New Search** to search again with more detailed information.

To Include Related/Affected Individuals

Select the Search Related/Affected Individuals checkbox to broaden your search to include clients who are HIV negative as well as those with unknown HIV status. An affected client can be a family member or partner, but they must be linked to an infected client who is receiving services.

Click the **Search** button. The results appear in the Client Search Results screen.

If only one client matches your search criteria, ARIES takes you directly to that individual's Contact Information screen. If the record does not match the client you are searching for, the Client Search screen redisplay, giving you an opportunity to search again with more detailed information.

If multiple matches are found, you are taken to the Client Search Result screen (displayed under the Client Search Results section below), which lists all clients who match your search. If none of the results match the client you're searching for, click **New Search** to search again with more detailed information.

To Specify Number of Results

You can specify the number of results to return on your search; the more results you ask for, the longer the search takes. The default is set at 20, which will typically fill the results screen.

To increase or decrease the number of results displayed in the search screen, place your cursor in the Display field and type a number.

To Search Other Agencies

If you are at an administrative agency, you may search for clients at all the agencies you administer.

If you have trouble finding a client, try reducing your search criteria. You may search for any client registered at your agency.

2.1.1 Client Search Result

When you click the **Search** button on the [Client Search](#) screen, ARIES looks up all the clients who match all your criteria and then displays them on the Client Search Result screen (as shown in the following screenshot). If there is only a single result for your search, you will be taken to the [Contact Information](#) screen.

Client Search Result								
8 records displayed								
Name	AKA	ID	SSN	DOB	Gender	Status	Agency	Agency Contact
ATestool, Hynam S		100020056		7/7/1977	Transgender MTF	Active	STS	
Aaa, Ann A		100008820 10043	111-11-1111	4/4/1940	Female	Lost to Follow-Up	ClearView	
Aaa, Ann A		100008820		4/4/1940	Female	Active	DD	Mouse, Mickey
Aaa, Ann A		100008820		4/4/1940	Female	Discharged	SRehab	
Ames, Aarron A	Kerry	100018860 TS1 IM1 10117 1474	100-01-8860	11/30/1989	Male	Active	STS	Van Dyke, Roberta
Ames, Aarron A		100018860	100-01-8860	11/30/1989	Male	Active	OAIS	
Aargo, Dion R		100014745		6/21/1960	Female	Active	ClearView	
Aargo, Dion R		100014745		6/21/1960	Female	Active	DD	

8 records displayed

The search results are listed in a table, alphabetically ordered by client name. Also listed in columns are the client's AKA ("also known as"), the client's agency ID number (if applicable), Social Security number, date of birth, gender, status, agency short name, and agency contact. In addition, the client's middle initial is embedded with the first and last names, e.g., the "S" in "ATestool, Hynam S."

Clicking a client name takes you to that individual's [Contact Information](#) screen.

If your search didn't find the client you were looking for, you can increase the number of results displayed by entering a new number in the text field to the right of the **Display** button in the Client Search Result screen, and then clicking the **Display** button.

If you still can't find the client you are searching for, try a new search using fewer criteria (for example, try using the last name only) by clicking the **New Search** button.

To create a new client, click the **Create New Client** button, which will initially take you to the [Client Search](#) screen. You will learn how to create clients in the following section.

2.2 Creating a New Client

When creating a new client, be careful not to enter duplicate client records. ARIES helps you avoid this by first asking you to search for the individual in the system before you create a new record for them.

Notes:

- ARIES blocks the addition of clients and contracts for Administrative Agencies and Super AA's.
 - The **Create New Client** button is not visible to users in Admin Agencies or Super AA's. New clients may not be created in these agencies.
1. From the [ARIES menu bar](#) at the top of the ARIES screen, choose the **New > Client** menu item, which takes you to the [Client Search](#) screen. In this screen, start with a quick search to make sure the client has not already enrolled at your agency.

- 2. If there are no matches for your search, then the Client Search screen redisplay with a suggestion to broaden your search, as well as a **Create New Client** button at the bottom. If you searched using only the client's last name, and you are sure it is correct, then you know that the client has not visited your agency before. Click the **Create New Client** button to search the records of other agencies and create a new record if the client isn't found.

Reminder: The **Create New Client** button is not visible to users in Admin Agencies or Super AA's. New clients may not be created by those agencies.

No records found. Try broadening your search.

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="Lyon"/>	
First Name	<input type="text" value="Dan"/>	
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	

Search Related/Affected Individuals

- 3. When you click **Create New Client**, a Client URN screen appears. This screen uses the components of a Unique Record Identifier (URN) to check whether the client is already registered in ARIES.

Client URN

To check if this client may already be registered in ARIES, please accurately enter the following data:

Last Name *

First Name *

Middle Initial *

Mother's Maiden Name *

Date of Birth *

Gender *

In the Client URN screen, ARIES matches the client's personal details against existing records to prevent any duplicates. Enter the client's last name, first name, middle initial, mother's maiden name, and date of birth in the corresponding text fields. You must be precise with this information to prevent duplicate records, and avoid using nicknames.

If the client has no middle name, leave the Middle Initial field blank.

For date of birth, use the format MM/DD/YYYY; for example, to specify a DOB of September 27, 1968, enter "9/27/1968." Use the dropdown list to choose the appropriate gender. In addition to male and female, a client may be transgender MTF (male-to-female) or transgender FTM (female-to-male). Gender may also be listed as "Other," "Unknown," or "Refused to Report."

Note: Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation. In some cases you will not be able to save a screen unless you make entries in all fields with a red asterisk.

Client URN

To check if this client may already be registered in ARIES, please accurately enter the following data:

No match was found. Please check your entries and search again. To create a new client record, verify the value in each field by tabbing through it and then click on the Create button.

Last Name *

First Name *

Disable ARIES capitalization, save name as entered

Middle Initial *

Mother's Maiden Name *

Date of Birth *

Gender *

Client agrees to share data

ARIES clients can receive services from multiple agencies. If a particular client is new to your agency, but has received services from another agency, ARIES alerts you that a record for them already exists. If the client has agreed to share their data between agencies, your agency will share access to the client's record and you do not need to make a new client entry.

If the client has a record at another agency but they have chosen not to share their information between agencies, ARIES alerts you. You should explain to the client that a record for them already exists in the system with another agency, and if they choose to, they can sign a release and a staff person with the proper permissions can share the client record with your agency. If the client chooses to keep separate (and therefore private) records at each agency, you must create a new record for them.

When you click the **Search** button, ARIES checks all clients for a match. If the search yields a match, and the client has agreed to share their data, then you will be taken to the [Client Contact Information](#) screen. If no match is found, ARIES will prompt you to double check your information for accuracy; this is done to avoid multiple records for a client. Press the **Tab** key through each text field and ensure that all the client's information has been entered properly and is correctly spelled.

When you tab through each field and all the information is correct, the **Search** button becomes a **Create** button. Before you click this button, explain to the client that if they choose, their record can be shared with other agencies. This helps expedite the intake process at other agencies. Ask them to review and sign the release allowing their record to be shared. If they agree to share their data and sign the release, go ahead and select the "Client agrees to share data" checkbox.

Client URN

To check if this client may already be registered in ARIES, please accurately enter the following data:

No match was found. Please check your entries and search again. To create a new client record, verify the value in each field by tabbing through it and then click on the Create button.

Last Name *

First Name *

Disable ARIES capitalization, save name as entered

Middle Initial *

Mother's Maiden Name *

Date of Birth *

Gender *

Client agrees to share data

4. Click the **Create** button to save the client record and start the intake process with the Client [Contact Information Edit](#) screen.

2.3 Services

Agencies provide services for clients. Services can include medical consultations, meals, housing assistance, psychological counseling, transportation, medication, and even intakes. ARIES manages and tracks services to help automate budgeting, create reports, and provide quality care for clients.

Each service must be entered as a separate service line item. This is done to track individual services for reporting purposes. Wherever possible, ARIES pre-fills text fields to make data entry quick and simple.

Staff persons enter new service line items after a client's eligibility for services has been verified and the client has been entered into the ARIES system. Staff persons who enter service line items include intake personnel, case managers, support services providers, data entry personnel, and other personnel who have proper permissions.

To access a client's Services screen:

- Click the Services tab at the top right of the Client Details screen. The Services screen lists all the services a client has received in a table.

You can filter the view of services for a client by selecting a date or date range, the staff person who provided the services, the program under which services were provided, the primary and secondary service categories, and subservices if any.

Note: A program will not display in the program dropdown list unless a contract exists for that program and the date range of the contract covers the service date you entered.

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

SERVICES ARIES

Hiram S ATestool ⚠

Services **New**

Date [] and [] Staff []

Program [] Primary []

Secondary [] Subservice [] Search

Date	Staff	Category	UOS	Total	Edit
3/9/2017	Mike O'Mara	CARE/HIPP > Health Insurance Premium > Co-Payment > Co-Payment	25.00 Month @ \$0.00	\$0.00	Edit


Complete the fields as follows:

New	Click this button to record a new service for the client on the Service Edit page.
Date filters	Enter the date you wish to filter by in the first text field using the format MM/DD/YYYY. E.g., for August 2, 2010, enter 8/2/2010. You can also click the calendar icon to use the pop-up calendar.

Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically.

To filter for records on a given day, select **"On"** from the dropdown list and enter a specific date, e.g. 8/2/2010, in the first text field. Leave the second text field empty. Select **"Before"** to sort through all entries before, but not including, that specific date. Enter the date, e.g. 8/2/2010, in the first text field and leave the second text field empty. This will retrieve records dated before midnight on August 2, 2010.

Select **"After"** to bring up all records dated after a specific date, including records dated that day. For example entering 8/2/2010 in the first text field clicking **Search** will display all the records dated

	<p>August 2, 2010 and all the days following it. For this option, leave the second text field empty.</p> <p>To filter a range of dates, select "Between" from the dropdown list and enter in the beginning of date in the first text field and the ending date in the second text field. Your viewed results will include all records from 12:00 AM on the first date to 11:59 PM on the second date. For example, entering 8/2/2010 in the first text field and 8/7/2010 in the second text field and clicking Search will display all records on August 2, 2010 through August 7, 2010.</p>
Staff	Use this dropdown list to filter the view of services by the staff person who provided them. If you make no selection, services by all staff members are displayed.
Program	<p>Use this dropdown list to filter the view of services by program. When you select a program, the corresponding primary services populate the Primary dropdown list.</p> <p>If you make no selection, all services are displayed and the Primary dropdown list is not populated.</p>
Primary	<p>Use this dropdown list to filter the view of services by primary service. When you select a primary service, the corresponding primary services populate the Secondary dropdown list.</p> <p>If you make no selection, all primary services for the program selected (if any) are displayed and the Secondary dropdown list is not populated.</p>
Secondary	The secondary service provided to the client.
Subservice	Agency-defined subservice provided to the client.
Date	The date the service was provided.
Staff	The staff person who provided the service.
Category	The type of service the client received, listed by program, primary service, secondary service and, if applicable, agency defined subservice. E.g., a dental exam may be listed as "Ryan White > Oral Health Care > Routine Treatment" where "Ryan White" is the program, "Oral Health Care" is the primary service, and "Routine Treatment" is the secondary service.
UOS	Units of service the client received under the associated category, and the cost of each unit of service. E.g., a day's worth of meals may be listed as "2 meals @ \$7."
Total	The total cost of the service.
	Click this button to edit the service on a given row on the Services Edit screen.

2.3.1 Recording or Editing a Service

Agencies provide clients with services which may include medical consultations, meals, housing assistance, psychological counseling, transportation, medication, and case management. ARIES manages and tracks these services to help automate budgeting, create reports, and provide quality care for clients.

Staff persons (intake personnel, case managers, support services providers, and data entry personnel) enter new service line items after a client's eligibility for services has been verified and the client has been entered into ARIES. Each service must be entered as a separate service line item, to track individual services for reporting purposes. Wherever possible, ARIES pre-fills text fields to make data entry quick and simple.

The default unit of service (UOS) for most service categories is "15 minutes." However, some service categories have different units of measurement such as "test" or "visit." Because the "Other Services" categories are a mixture of diverse services, the units of measurement are varied.

Notes:

- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "*Check the client's CDC Disease Status.*" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.
 - The system prevents you from going on if data is not entered in these fields.

Entering a New Service

- Do a Client Search to access the client's Services screen.
- From the ARIES menu bar at the top of the ARIES screen, select Find > Client. The Client Search screen is displayed.

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="Opsice"/>	
First Name	<input type="text" value="Corey"/>	
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 >"/>		

Search Filters

- You may search for any client registered at your agency. You can limit the search results by using one of the following filters: Name, agency client ID, Social Security number, date of birth, or by related/affected individuals.

To Search by Client Name

- Last Name - Enter the client's last name.
- First Name - Enter the client's first name. Do not use middle initial in the First Name field, e.g., "Mary J."
- Middle Initial - if available, enter the client's middle initial.
- If you are unsure of the spelling of a name, you can try using the wildcard "*" (asterisk). Example: If you enter "Mac*" in the last name field, the search will return all last names and all "Also Known As" names that begin with "Mac."
- Click the **Search** button. ARIES looks up all the clients who match all your criteria and then displays them on the Client Search Result screen (as shown in the following screenshot). If there is only a single result for your search, you will be taken to the Contact Information screen.

Client Search Result								
								8 records displayed
Name	AKA	ID	SSN	DOB	Gender	Status	Agency	Agency Contact
ATestool, Hiram S		100020056		7/7/1977	Transgender MTF	Active	STS	
Aaa, Ann A		100008820 10043	111-11-1111	4/4/1940	Female	Lost to Follow-Up	ClearView	
Aaa, Ann A		100008820		4/4/1940	Female	Active	DD	Mouse, Mickey
Aaa, Ann A		100008820		4/4/1940	Female	Discharged	SRehab	
Ames, Aaron A	Kerry	100018860 TS1 IM1 10117 1474	100-01-8860	11/30/1989	Male	Active	STS	Van Dyke, Roberta
Ames, Aaron A		100018860	100-01-8860	11/30/1989	Male	Active	QAIS	
Aargo, Dion R		100014745		6/21/1960	Female	Active	ClearView	
Aargo, Dion R		100014745		6/21/1960	Female	Active	DD	

8 records displayed

- Click the client's name to go to that individual's [Contact Information](#) screen.

Note: If your search didn't find the client you were looking for, you can increase the number of results displayed by entering a new number in the text field to the right of the **Display** button in the Client Search Result screen, and then clicking the **Display** button. If you still can't find the client you are searching for, try a new search using fewer criteria (for example, try using the last name only) by clicking the **New Search** button.
- Select the Service tab on the far right of the client tabs to bring up the client's Services screen, which lists all the client's service line items.

SERVICES ARIES

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

Hiram S ATestool ⚠

Services New

Date and Staff

Program Primary

Secondary Subservice Search

Date	Staff	Category	UOS	Total	Edit
3/9/2017	Mike O'Mara	CARE/HIPP > Health Insurance Premium > Co-Payment > Co-Payment	25.00 Month @ \$0.00	\$0.00	Edit

- Click the **New** button in the upper left-hand corner of the screen to bring up the New Service screen. Some information is pre-filled by default but can be changed.

Service

Client Anderson, John

Staff * Torres, Dayna

Site Basin Assistance Services

Date of Service * 9/4/2009

Days to Next Service **date**

Contract Name * 09-10 Part B Base

Created Date 9/9/2009

Program * Ryan White

Primary Service * Medical Case Management (including Treatment Adherence)

Secondary Service * Medical Case Management (including Treatment Adherence)

Agency Subservice * Rosemarry Casillas

Units of Service * 1.00 @ \$ 66.12 per 15 Minutes = \$ 66.12 **Total**

Client Payment **CARE/HIPP Co-Payment ***

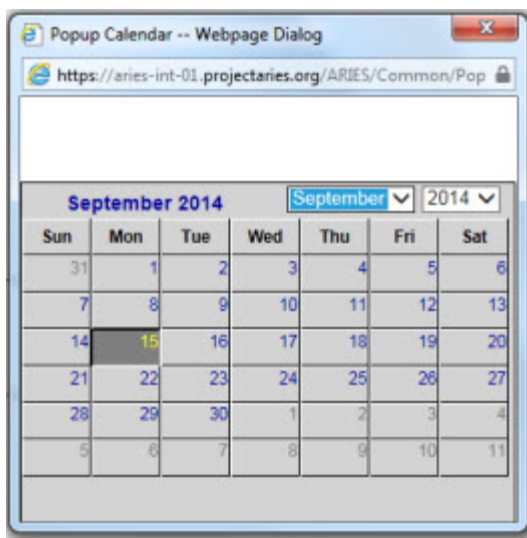
Actual Minutes Spent

Service Notes

Finalize (record will be uneditable after changes are saved)

Complete the fields as follows. Fields marked with a red asterisk (*) are required.

Client Name dropdown	If the client's name is not pre-filled, use the Client Name dropdown to select how you want to identify the client (e.g., the client name -- first plus last name -- is the most common identifier, but you can also use an agency-specific client ID, program client ID or ARIES ID).
Client Name Text field	If the client's name is not pre-filled, enter the corresponding name or ID in the text field. Note: If you use the client's name, do <i>not</i> enter their middle initial.
Staff	Use the Staff dropdown to select the staff person responsible for the service. Your name is the pre-selected choice, but if you are entering data on behalf of someone else, you must select the name of the person providing the service.
Site	If your agency has multiple sites, use the Site dropdown to select the location where the service was provided.
Date of Service	Enter the date the service was administered. Use the format MM/DD/YYYY. Example: For May 25, 2011 you would enter 05/25/2011. You can also use the calendar pop-up by clicking the calendar icon.



Use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.

Notes

- If the service occurs over multiple days - for example, a hospital stay or daily transportation - enter the start date of the service.
- Some installation allow future dating of services under the CARE-HIPP-Health Insurance Premium, PCIP-High-risk Insurance Pool, and MEDICARE PART D-Medicare Supplement programs. To determine whether your installation allows future dating, check with your system administrator.
- If you enter a future service date exceeding the limit for your installation, the associated dropdown fields on the Service Edit screen will display a message reading **"Enter a service date that has an active contract."**

<p>Days to Next Service fields</p>	<p>Enter the number of days until the client is scheduled to receive their next service. Example: If the client needs a follow-up visit after three months, enter 90 in the Days to Service field and the date is automatically calculated and entered in the Date field.</p> <p>Similarly, if you enter the date in the Date field (using either the format MM/DD/YY, or the pop-up calendar), the number of days is automatically calculated and entered in the Days to Next Service field.</p> <p>The Days to Next Service can be used as a reminder or to-do item for this client.</p>
<p>Contract Name</p>	<p>Use the dropdown to select the contract name. Your choice determines what will appear in the subsequent Program, Preliminary Service, Secondary Service, and Agency Subservice dropdown lists.</p> <p>Example: Selecting Medicare from the Contract dropdown will list only the services available under that contract in the subsequent service dropdowns.</p> <p>If multiple contracts are listed, use the Contract Name dropdown to select the contract under which the service is to be reimbursed.</p>
<p>Program</p>	<p>Use the dropdown to select the type of program (e.g., Ryan White).</p>




	<p>Services are organized in four tiers: Program, Primary Service, Secondary Service, and Agency Subservice. The dropdown selection you choose at one tier fills in the available services at lower tiers.</p> <div data-bbox="423 302 1214 575" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Program * <input type="text" value="Ryan White"/></p> <p>Primary Service * <input type="text" value="Rehabilitation Services"/></p> <p>Secondary Service * <input type="text" value="Rehabilitation Services"/></p> <p>Agency Subservice * <input type="text" value="Rehabilitation Services"/></p> </div> <p>Example: If a client is eligible for services under your agency's Medicare contract, select the Medicare contract from the Program dropdown list. As a result of this selection, only the services available under that contract will be displayed in the service dropdown lists.</p> <p>Note: A program will not display in the program dropdown field unless a contract exists for that program and the date range of the contract covers the service date you entered.</p>
<p>Primary Service</p>	<p>Use the dropdown to select the primary service. Your choice determines what will appear in subsequent service dropdown lists.</p> <p>Example: If you select Mental Health Services from the Primary Service dropdown, the Secondary Service dropdown will list only the mental health services your agency provides.</p>
<p>Secondary Service</p>	<p>Use the Secondary Service dropdown to select the secondary service.</p> <p>Choosing a secondary service fills the Agency Subservice dropdown with the specialized subservices your agency offers. Again, only those services specified in the contract setup will be shown.</p> <p>If the service line item is medication, the HRSA Drug Code dropdown list appears in the form. Select the code that corresponds to the client's medication. Each line in the dropdown lists the medication's brand name, generic name, and HRSA drug code.</p>
<p>Agency Subservice</p>	<p>Use the Agency Subservice dropdown to select the agency subservice.</p>
<p>HRSA Drug Code dropdown <i>(Appears if the service line item is medication)</i></p>	<p>If the service line item is medication, this window appears. In the blank window, type the first few letters of the medication to reveal a listbox from which you may select the applicable medication.</p> <div data-bbox="423 1486 771 1577" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Agency Subservice * <input type="text" value="Medication"/></p> <p>HRSA Drug Code * <input type="text"/></p> </div> <p>Do not type spaces or the listbox will disappear.</p>
<p>Units of Service</p>	<p>The default values for the Units of Service, Cost, per, and Total text boxes automatically fill in when you enter a service type.</p> <p><u>Changing the costs and unit quantities</u></p> <p>You can change the costs and unit quantities. Example: An intake, which is measured in quarter hour visits, may normally take 3 hours, or 12 units. The units default to 12 when you choose a subservice. However, if you have a particularly lengthy intake that takes four</p>

	<p>hours, you would replace the "12" with "16" and the total would recalculate in the Total text field.</p> <p><u>Services not calculated by units of service</u></p> <p>For services not calculated by units of service, leave the Cost text field empty and enter the actual cost of the service in the Total text field.</p> <p>Examples:</p> <p>One-way trips might be reimbursed by mileage. The unit of service is one but a one-way trip could be several miles so the Cost text field is left empty and the actual cost of the service is entered in the Total text field.</p> <p>For medication, the unit of service is by prescription. A 100-pill prescription is still one unit of service, so enter the cost of the medication in the Total text field.</p>
@ \$ field	<p>Enter the cost of the service.</p> <p>Note: Some services are not calculated by units of service. Example: One-way trips might be reimbursed by mileage. The unit of service is 1, but a one-way trip could be several miles. In such cases, leave the cost text field empty and enter the actual cost of the service in the Total field.</p>
Per field	From the dropdown list, select the item of service, e.g., meal.
= \$ total field	This field is automatically calculated, except where otherwise indicated. (See above notes for the @ \$ field).
Client Payment	In the Client Payment field, enter the actual dollar amount paid by the client (if applicable).
CARE/HIPP Co-Payment	In the CARE/HIPP Co-Payment field, enter the amount of the co-payment paid by CARE/HIPP service.
Actual Minutes Spent	Enter the amount of time used for an appointment in the Actual Minutes Spent text field. Example: If a consultation lasted 35 minutes – even if it was scheduled for an hour – enter 35. This does not affect the reimbursement process, but it is used for internal reports and scheduling.
Services Notes textbox	Use the Service Notes text box to enter any other details pertaining to the service line item including any additional payment sources.
Finalize	<p>Select the Finalize checkbox to prevent the record from being edited further once you have saved it.</p> <p>Note: Once the box is checked, it can never be edited again.</p>
Edit ART Medication History	This checkbox appears only if the service type is medication. Check the box if it is an ART medication, which will then be recorded on the client's ART Medication Edit screen.

Note: If you attempt to enter a duplicate service (same client, date, contract, program, primary service, secondary service and subservice), ARIES displays a warning message. To

save the duplicate service, you must check the "Create Duplicate Service Records" box and click **Save + Done** or **Save + Another**.

When you have completed your entries:




	<p>Click this button to save your input and return to the client's Services screen.</p>
	<p>Click this button to discard your entries and return to the client's Services screen.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is available only to users with the appropriate permission level.</p> <p>Note: You are prompted to confirm the deactivation.</p> <p>To confirm the deactivation, click OK. You will be returned to the HOPWA screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.</p> <p>If you do not want to deactivate the record, click Cancel and you will be returned to the Service Edit screen.</p>

Editing an Existing Service

To access the client's Services screen:

- Perform a Client Search to access the client's Contact Information screen.
- Select the Services tab on the far right side of the client tabs to bring up the client's Services screen, which lists all the client's service line items.
- Click the **Edit** button on the row of the service you wish to edit to bring up the Service Edit screen pre-filled with the client's information.
- Follow the above instructions under [Entering a New Service](#) to edit a specific item in an existing service.

When you have finished editing, select one of the following:

	<p>Click this button to save your input and return to the client's Services screen.</p>
	<p>Click this button to discard your entries and return to the client's Services screen.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p>

This option is available only to users with the appropriate permission level.

Note: You are prompted to confirm the deactivation.

To confirm the deactivation, click **OK**. You will be returned to the HOPWA screen.

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.

If you do **not** want to deactivate the record, click **Cancel** and you will be returned to the Service Edit screen.

2.4 Demographics

The Client Demographics screens show the client's residential and personal information which contains important contact and assistance details. In addition, having a full demographic overview could avail a client of programs available for specific demographic groups. For data collectors and researchers, aggregate demographics can help enhance the quality and efficiency of services to clients.

Client Alerts

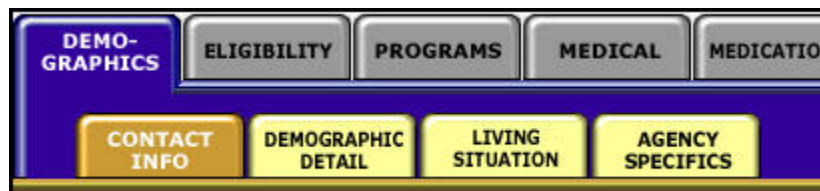
A yellow triangular caution icon next to a client's name signifies that a client alert has been entered.



Client alerts contain important details about dealing with the client - for example, if they have sensitive health problems or behavioral issues.

- Click the yellow caution icon to open an alert box with message details, the name of the person who entered the information, and the date it was recorded.
- You may also hover your mouse over the triangle to view a message about the client. The display will include the name of the user who entered or edited the message and the date of entry. The user's name and the entry date are updated when the alert is entered or updated.

The Demographics screens include a second tier of navigational tabs. Use these tabs to jump to each section's screen.



The Demographics screens include:

- [Contact Information](#)
- [Demographic Detail](#)
- [Living Situation](#)

- [Agency Specifics](#)

2.4.1 Contact Information

When you access a client's demographic details, the first screen you will see is the Contact Information screen. This screen contains phone numbers, current and previous addresses, e-mail address, and emergency contact information, as well as the client's contact preferences.

Hiram S ATestool ⚠

Contact Information **Edit** **Client Detail Report**

Phones:
707-996-1001 (Mobile) -- do not contact; be confidential; no messages
testy@hsa.com -- do not contact; be confidential; no messages

Residence:
as of 1/10/2010
101 Ratchet way, Number 1
mmn-graph
CA 95476
County: Sonoma
Geog Area/HSDA:

Previous Address:

County:
Geog Area/HSDA:

Contact by mail: Yes
Be confidential
Note: Do Not Alter Please (Note: mmn-graph)
123456789A123456789B123456789c123456789D123456789e123456789f1234
(64 characters for cut-n-paste) (SymbolsNotCommonly Used):
123456789A~!@#\$\$%^&*B123456789c123456789D123456789e123456789f1234

Mailing Address:
101 Ratchet way, Number 1
mmn-graph
Do Not Alter This TestClient, CA 95476
County: Sonoma
Geog Area/HSDA:

Emergency:
Candy Calibration
123 Inertia Drive
CA 95476
Phone 1: 707-996-0110
Phone 2:
be confidential; no messages

Residence Address Verifications

Verified Date	Verified By	Agency	Due Date	
	Nancy McCampbell	Shasta Test Services	12/10/2015	Verify
	Mike O'Mara	Shasta Test Services	12/11/2014	Verify
	Mike O'Mara	Shasta Test Services	12/8/2014	Verify
	Nancy McCampbell	Shasta Test Services	12/9/2013	Verify

[HyperLink Field Revised to confirm array update](#) | [Client ID](#) | [My Link](#)

[Contact Information](#)

Client Preferences

It's very important to look at any notes next to the contact phone numbers, including:

- Do not call - Do not use this phone number under any circumstances.
- No messages - If the client or contact is not available, do not leave a message of any kind.
- Be confidential - Do not use the agency name or leave any HIV-related information in a message or on an answering machine.

Contact by Mail

If the client chooses to be contacted by mail, use the mailing address given. "Stay confidential" means that the client wants no reference to the agency on the envelope.

Emergency Contact

If the emergency contact contains the note, "Confidential," this means that the agency should only speak to the individual listed as the contact. "No messages" means that if the emergency contact is not available, do not leave a message of any kind.

- If you have the proper permissions, you may click the **Edit** button to change any contact information.

Residence Address Verifications

The Residence Address Verifications grid displays client task list information related to verifying the client's address. This may happen, for example, as part of a recertification or attestation process. The table tells which agency generated the task ('Agency'), the Staff who is assigned the Task ('Verified By'), the Task Outcome Date ('Verified Date') and the date that the Task is due ('Due Date').

The table sorts in reverse date order so that incomplete verifications appear at the top.

Selecting the **Verify** button brings up a popup window with Outcome which defaults to 'Complete,' Outcome Date which defaults to today's date, Save which saves the record and Cancel which returns the user to the read-only page without saving anything.

Residence Address Verification for Hiram S ATestool

Outcome

Outcome Date

2.4.1.1 Client Detail Report

You can run a Client Detail Report listing all information for a client, including services, that you may view in ARIES based on your permissions.

If you have the proper permissions, the **Client Detail Report** button is visible on the read-only Contact Info tab.

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

CONTACT INFORMATION ARIES

Hiram S ATestool

Contact Information

Phones:
707-996-1001 (Mobile) -- do not contact; be confidential; no messages
testy@hsa.com -- do not contact; be confidential; no messages

Residence:
as of 1/10/2010
101 Ratchet way, Number 1
mmn-graph
CA 95476

County: Sonoma
Geog Area/HSDA:

Previous Address:

County:
Geog Area/HSDA:

Contact by mail: Yes
Be confidential
Note: Do Not Alter Please (Note: mmm-graph)
123456789A123456789B123456789c123456789D123456789f1234 (64 characters for cut-n-paste)
(SymbolsNotCommonly Used): 123456789A~!@#%
^&*B123456789c123456789D123456789e12345678

Mailing Address:
101 Ratchet way, Number 1
mmn-graph
Do Not Alter This TestClient, CA 95476
County: Sonoma
Geog Area/HSDA:

Emergency:
Candy Calibration
123 Inertia Drive
CA 95476

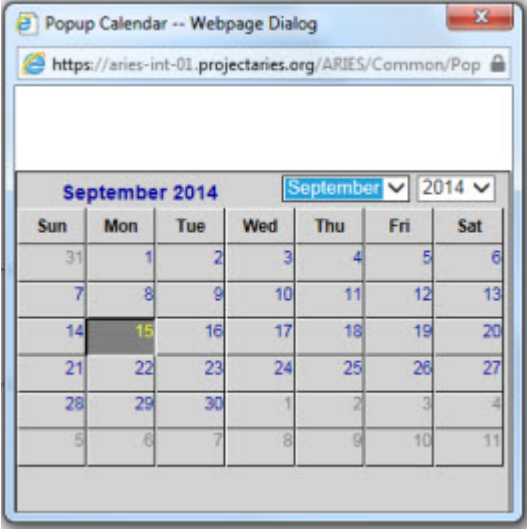
To create a Client Detail Report, click on the **Client Detail Report** button to bring up the Client Detail Report parameters screen.

Client Detail Report for BxE Y AxA



Start Date **End Date**

Data Element Visibility	<input type="text" value="Display all"/> ▼
Non-Longitudinal Sections	<input checked="" type="checkbox"/> Client Information <input checked="" type="checkbox"/> Agency Specifics <input checked="" type="checkbox"/> Contact Information <input checked="" type="checkbox"/> Emergency Contact Information <input checked="" type="checkbox"/> Demographics <input checked="" type="checkbox"/> Financial <input checked="" type="checkbox"/> Basic Medical <input checked="" type="checkbox"/> Related Affected
Agency Specifics Logs	<input type="text" value="Display all data for report date range"/> ▼
Living Situation	<input type="text" value="Display all data for report date range"/> ▼
Eligibility Document	<input type="text" value="Display all data for report date range"/> ▼
Insurance	<input type="text" value="Display all data for report date range"/> ▼
HIV Test	<input type="text" value="Display all data for report date range"/> ▼
AIDS Defining Condition	<input type="text" value="Display all data for report date range"/> ▼
CD4 Test	<input type="text" value="Display all data for report date range"/> ▼
Viral Load	<input type="text" value="Display all data for report date range"/> ▼
STI Hepatitis	<input type="text" value="Display all data for report date range"/> ▼
Immunization	<input type="text" value="Display all data for report date range"/> ▼
Hospital Visit	<input type="text" value="Display all data for report date range"/> ▼
Pharmacies	<input type="text" value="Display all data for report date range"/> ▼
Allergies	<input type="text" value="Display all data for report date range"/> ▼
ART Therapy	<input type="text" value="Display all data for report date range"/> ▼
ART Medication	<input type="text" value="Display all data for report date range"/> ▼
Drug Adherence	<input type="text" value="Display all data for report date range"/> ▼
Mental Health	<input type="text" value="Display all data for report date range"/> ▼
Substance Abuse	<input type="text" value="Display all data for report date range"/> ▼
Services	<input type="text" value="Display all data for report date range"/> ▼

Complete the report parameters as follows:

<p>Start Date</p>	<p>Enter the start date of the report. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>End Date</p>	<p>Enter the end date of the report. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>
<p>Data Element Visibility</p>	<p>Use the dropdown to select the data element visibility. Options include "Display all" and "Hide when no data exists."</p>
<p>Non-Longitudinal Sections</p>	<p>To make a non-longitudinal data item visible in the report, check the adjacent box. To omit it from the report, uncheck the box.</p>
<p>Dropdowns for Agency Specifics Logs through Services</p>	<p>The dropdown for each longitudinal section provides three date-range reporting options:</p> <ul style="list-style-type: none"> • <u>Display all data for report date range</u>: When you select this option, all entries for this longitudinal record between the start and end dates you specified for the report will be displayed. • <u>Display all data for custom date range</u>: When you select this option from the dropdown, custom Start Date and End Date fields appear below the name of the longitudinal data item. Complete these fields to specify a custom date range for this data item only. • <u>Hidden</u>: When you select this option, the specific data item is not displayed in the report.

After selecting your parameters:

	Click this button to view the report results.
	Click this button to return to the read-only Contact Info screen without saving your entries.


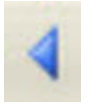
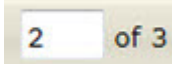
1 of 2 ? 100% Find | Next




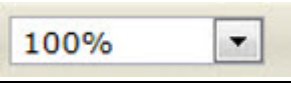
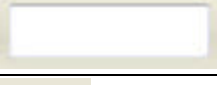




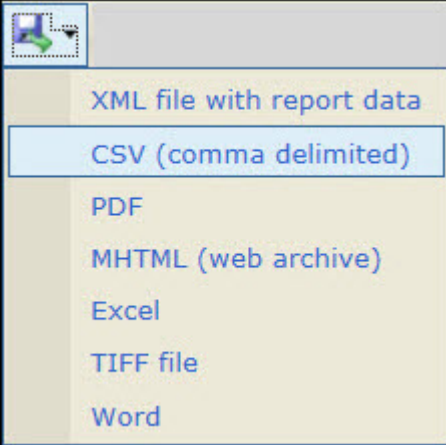

Client Detail Report for BxE AxA

Agency Name: 4816 - AIDS Foundation Houston

Client Information		Agency Specifics	
Last Name	AxA	Status	Active
First Name	BxE	Enrollment Date	06/13/2006
Middle Initial	Y	Reason for status change	Reason RRRR
Mothers' Maiden Name	ML	Agency Client ID1	DDDDDDDDDDDDDDDDDD
Date of Birth	06/07/1987	Agency User ID1	
Age:	25	Referral Source	
URN Extended:	BEAA0607872YML	Status As Of Date	11/28/2007
Last Updated	09/01/2011	Agency Client ID2	DDDDDDDDDDDDDDDDDD
Demographics		Agency User ID2	
AKA		Referral Date	12/01/2009
Hispanic Major Ethnicity	Yes	Last Updated	12/12/2009
Marital Status		Residence Address	
Language Primary	English	Street 1	
Date of Death		Street 2	
Veteran	No	City	Austin
		State	TX

All result screens display a ribbon with the following icons (from left to right):

	Use this icon to go to the first page of a report.
	Use this icon to go back one page in a report.
	Use this window to enter the number of the page of the report you wish to display.

	<p>Use this icon to advance one page in the report.</p>
	<p>Use this icon to go to the last page of the report.</p>
	<p>Not used in this report.</p>
	<p>Use the dropdown to select the percentage of screen magnification. Default is 100%.</p>
	<p>Use this window to input your search criteria (e.g., specific date or results category).</p>
	<p>Click Find to begin your search.</p>
	<p>Click Next to go to the next search result.</p>
	<p>Click this icon to export the report. When the associated dropdown appears, select from the following options:</p> <ul style="list-style-type: none"> • XML file with report date • CSV (comma delimited) • PDF • MHTML (Web archive) • Excel • TIFF file • Word <p>Right click on the link and select Open, Save, Save As, or Save and Open to save the file to your computer.</p>
	<p>Click this icon to display format options.</p> 
	<p>Click this icon to refresh the screen.</p>



Click this icon to print the report. Follow the printing instructions in your browser.

2.4.2 Contact Information Edit

Notes

- When you enter a new client, a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.
- When you have updated the client's records on the Contact Information, Demographic Detail, or Living Situation tab, you must update the Agency Specifics screen by making a selection from the Reason for Status Change dropdown list.
- The defaults for phone calls, messages, mail and e-mail are all set at "NO" to maximize client confidentiality. All users must answer each field according to the client's actual responses to these items. Users should review and accurately answer each field before saving the record.
- **Exception:** The exception to the above bullet is the settings for the Emergency Contact section at the right side of the screen. In that section, the most confidential setting is "Yes."

The Contact Information Edit screen allows you to enter a new client, or to edit the phone numbers, addresses and emergency contact information for an existing client.

The top portion of the Contact Information Edit Screen contains four sections: Residence, Mailing, Previous, and Emergency Contact.

Lash L Larue Contact Information

ADDRESSES

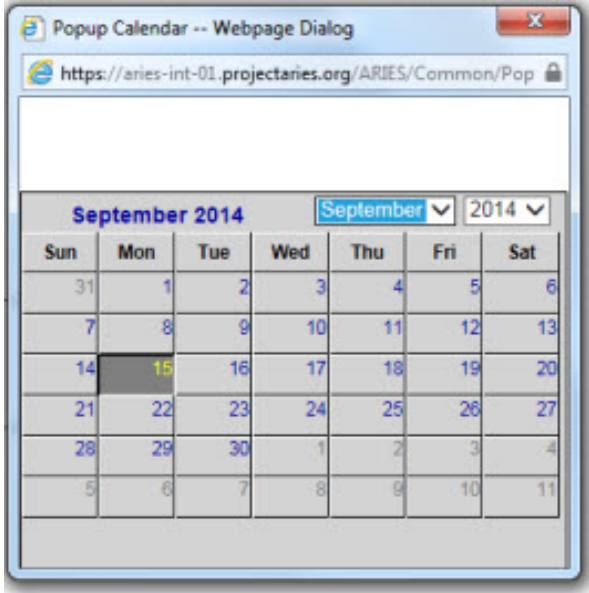
Residence	Mailing	Previous	Emergency Contact
Since: <input type="text" value="1/2/2008"/>	<input type="checkbox"/> Same as Residence	<input type="text" value=""/> <input type="checkbox"/> Same as Residence	<div style="border: 1px solid #ccc; padding: 2px;"> Name <input type="text" value="Alibi Terhune"/> </div> <div style="border: 1px solid #ccc; padding: 2px;"> 421 Old West Avenue </div> <div style="border: 1px solid #ccc; padding: 2px;"> Maynard </div> <div style="border: 1px solid #ccc; padding: 2px;"> <input type="text" value=""/> </div> <div style="border: 1px solid #ccc; padding: 2px;"> CA <input type="text" value="94520"/> * </div> <div style="border: 1px solid #ccc; padding: 2px;"> Tel1 <input type="text" value="925-666-6666"/> </div> <div style="border: 1px solid #ccc; padding: 2px;"> Tel2 <input type="text" value=""/> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="border: 1px solid #ccc; padding: 2px; background-color: #ff0000; color: white;"> Confid <input type="text" value="Yes"/> </div> <div style="border: 1px solid #ccc; padding: 2px; background-color: #ff0000; color: white;"> Msgs OK <input type="text" value="No"/> </div> </div>
Street 1: <input type="text" value="421 Old West Avenue"/>	<input type="text" value=""/>	<input type="text" value=""/>	
Street 2: <input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	
City: <input type="text" value="Maynard"/>	<input type="text" value=""/>	<input type="text" value=""/>	
State & Zip: CA <input type="text" value="94520"/> *	<input type="text" value=""/>	<input type="text" value=""/>	
County: <input type="text" value="Contra Costa"/>	<input type="text" value=""/>	<input type="text" value=""/>	
Geog Area/HSDA: <input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	
May we contact you by mail? <input type="text" value="No"/>	Note: <input type="text" value=""/>		
Should mail be confidential? <input type="text" value="Yes"/>			

PHONE AND EMAIL

Phone Type	Allow Contact	Confid	Msgs OK
Phone 1: <input type="text" value="925-666-6666"/>	<input type="text" value="Work"/>	<input type="text" value="No"/>	<input type="text" value="Yes"/>
Phone 2: <input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="No"/>	<input type="text" value="Yes"/>
Email 1: <input type="text" value=""/>	<input type="text" value="No"/>	<input type="text" value="Yes"/>	<input type="text" value="No"/>

Completing the Top Portion of the Screen

Residence

Since	<p>Enter the date the client began living at their current residence. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Since" field. A calendar pop-up appears.</p>  <p>Use the dropdown lists to select the month and year. Then click the day of the month. The calendar window automatically closes and the "Since" field is completed.</p>
--------------	---

Street 1	Enter the client's current residential street address.
Street 2	Enter any piece of information that does not fit into a street name and number, such as Post Office box, Apartment Number, or rural route number.
City	Enter the city where the client currently resides.
State & Zip	Enter the state and the five-digit zip code where the client currently resides. Use the dropdown to select the state.
County	Use the dropdown to select the county in which the client resides. This is a required field. If you cannot determine the county, select "Unknown" from the dropdown.
Geog Area HSDA	If your state and/or county uses Geographic Areas or Health Service Delivery Areas (HSDAs) to identify where the client resides, select the correct option from the dropdown. Otherwise, leave the field blank.

Mailing


Same as Residence checkbox	Check this box if the client's mail is delivered to their residential address. ARIES will automatically populate the mailing address fields with the same information as in the residence address fields.
Street 1	Enter the client's mailing address, if different from their residence address.
Street 2	Enter any piece of information that does not fit into a street name and number, such as a post office box, apartment number, or rural route number.
City	Enter the city where the client's mail will be sent.
State & Zip	Enter the state and the five-digit zip code where the client's mail will be sent. Use the dropdown to select the state.
County	Use the dropdown to select the county in which the client's mailing address is located. This is a required field. If you cannot determine the county, select "Unknown" from the dropdown.
Geog Area HSDA	If your state and/or county uses Geographic Areas or Health Service Delivery Areas (HSDAs) to identify where the client's mailing address is located, select the correct option from the dropdown. Otherwise, leave the field blank.

Previous


Since	Enter the date the client began living at their previous residence. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Since" field. Use the dropdown lists to select the month and year. Then click the day of the month. The calendar window automatically closes and the "Since" field is completed.
Street 1	Enter the client's previous residential street address.
Street 2	Enter any piece of information that does not fit into a street name and number, such as a post office box, apartment number, or rural route number.
City	Enter the city where the client previously resided.
State & Zip	Enter the state and the five-digit zip code where the client previously resided. Use the dropdown to select the state.
County	Use the dropdown to select the county in which the client previously resided. This is a required field. If you cannot determine the county, select "Unknown" from the dropdown.
Geog Area HSDA	If your state and/or county uses Geographic Areas or Health Service Delivery Areas (HSDAs) to identify where the client previously resided, select the correct option from the dropdown. Otherwise, leave the field blank.

Emergency Contact

Name	Enter the name of the client's emergency contact.
Street Address and City	In the fields below the "Name" field, enter the emergency contact's address and city.
State and Zip Code	Enter the state and the five-digit zip code of the client's emergency contact. Use the dropdown box to select the state.
Tel 1	Enter the telephone number of the emergency contact. Include the area code, and use hyphens to separate the numbers. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345
Tel 2	Enter an alternative telephone number for the emergency contact, if any. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345

<p>Confid</p>	 <p>From the Confid dropdown, select one of the following:</p> <p>Select "Yes" if the client wants emergency calls to be confidential, i.e., the client does not want your agency's name mentioned in a message or on the contact's answering machine.</p> <p>Select "No" if the client allows your agency's name to be mentioned in a message or on the contact's answering machine.</p> <p>Note on Confidentiality: It is possible to leave messages for a client or a client's emergency contact without indicating the nature of the call, i.e., revealing their HIV status, test results, etc. A confidential message might simply say, "Please call your doctor" or "Please call your case manager."</p>
<p>Msgs OK</p>	<p>From the Msgs OK dropdown, select one of the following:</p> <p>Select "Yes" if it is OK to leave messages for the emergency contact.</p> <p>Select "No" if the client does not want any messages left for the emergency contact.</p>

Mail Preferences

<p>May we contact you by mail?</p>	 <p>Use the dropdown to select one of the following:</p> <p>Select "Yes" if the client agrees to receive mail.</p> <p>Select "No" if the client does not agree to receive mail.</p>
<p>Should mail be confidential?</p>	<p>Indicates whether mail is confidential or whether it is OK to mention the agency's name in an email message.</p> <p>1 = Yes if confidential. Do not mention the agency's name.</p> <p>0 = No if not confidential. It is OK to mention the agency's name.</p>

Note field	Enter any piece of information that does not fit into a street name and number, such as a post office box, apartment number, or rural route number.
City	Enter the city where the client's mail will be sent.
State & Zip	Enter the state and the five-digit zip code where the client's mail will be sent. Use the dropdown to select the state.
County	Use the dropdown to select the county in which the client's mailing address is located. This is a required field. If you cannot determine the county, select "Unknown" from the dropdown.
Geog Area HSDA	If your state and/or county uses Geographic Areas or Health Service Delivery Areas (HSDAs) to identify where the client's mailing address is located, select the correct option from the dropdown. Otherwise, leave the field blank.

The lower portion of the Contact Info Edit screen contains a table of fields for phone and e-mail information:

		Phone Type	Allow Calls	Confid	Msgs OK
Phone 1	415-555-1212	Home	Yes	No	Yes
Phone 2	510-555-1212	Work	Yes	Yes	No
Email 1	jporter@hotmail.cc		Yes	Yes	Yes

Buttons: Save + Next, Save + Done, Cancel




Completing the Lower Portion of the Screen

Phone 1	Enter the client's primary phone number. Include the area code, and use hyphens to separate the numbers.
Phone Type	Use the dropdown to indicate the type of phone number - home, work, mobile, fax, etc. If the client has a voice mailbox or messaging service, select "Message" for the phone type. If the phone number is for a telephone typewriter for the hearing impaired, select "TTY" for the phone type.

Allow Contact	Select "Yes" if the client agrees to allow the agency to contact them using this number. Select "No" if the client does not want the agency to contact them using this number.
Confid	See the Note on Confidentiality above. Select "Yes" if the client does not want your agency's name in a message or on the client's answering machine. Select "No" if the client allows your agency's name to be mentioned in a message or on the client's answering machine.
Msgs OK	Select "Yes" if the client allows phone messages left at this number. Select "No" if the client does not want phone messages left at any time at this number.
Phone 2	Enter the client's secondary phone number, if available. Include the area code, and use hyphens to separate the numbers.
Phone Type	Use the dropdown to indicate the type of phone number-- home, work, mobile, fax, etc. If the client has a voice mailbox or messaging service, select "Message" for the phone type. If the phone number is for a telephone typewriter for the hearing impaired, select "TTY" for the phone type.
Allow Contact	Select "Yes" if the client agrees to allow the agency to contact them using this number. Select "No" if the client does not want the agency to contact them using this number.
Confid	See the Note on Confidentiality above. Select "Yes" if the client does not want your agency's name in a message or on the client's answering machine. Select "No" if the client allows your agency's name to be mentioned in a message or on the client's answering machine.
Msgs OK	Select "Yes" if the client allows phone messages left at this number. Select "No" if the client does not want phone messages left at any time at this number.
Email 1	Enter the client's e-mail address.
Allow Contact	Select "Yes" if the client agrees to allow e-mails. Select "No" if the client does not want any e-mail sent at any time.
Confid	See the Note on Confidentiality above. Select "Yes" if the client does not want your agency's name in an email message.

	Select "No" if the client allows your agency's name to be mentioned in an email.
Msgs OK	Select "Yes" if the client agrees to allow e-mails. Select "No" if the client does not want e-mails at any time.

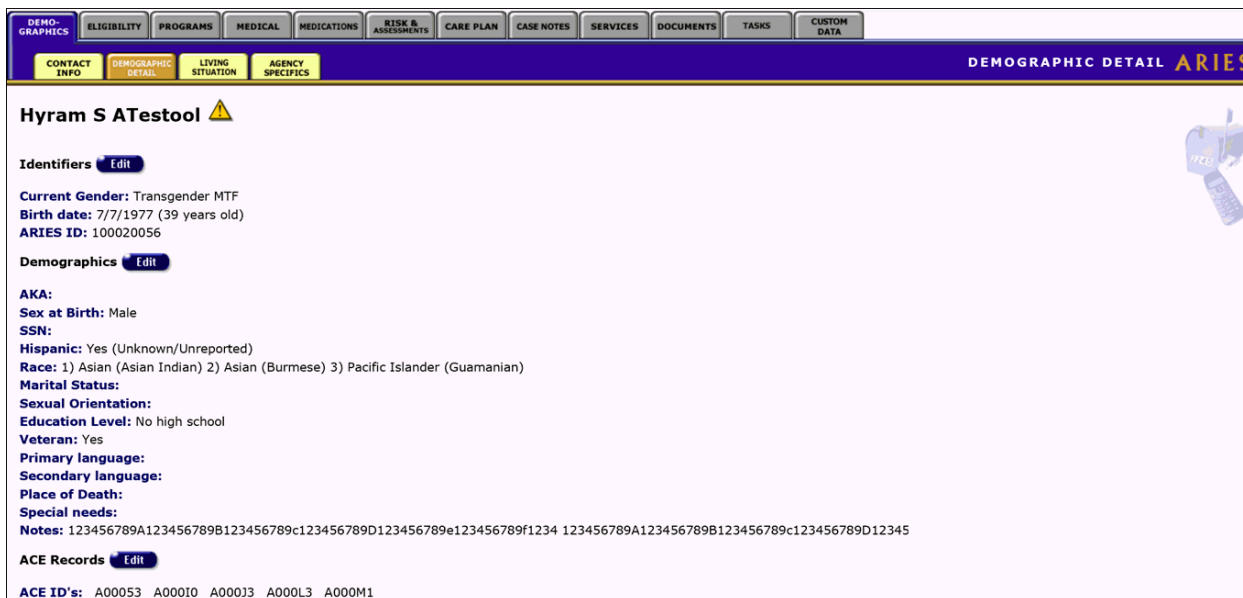
After completing the fields on the screen:

	Click this button to save your input and proceed to the Demographics Edit screen.
	Click this button to save your input and return to the Contact Information screen.
	Click this button to return to the Contact Information screen without saving your input.

2.4.3 Demographic Detail

The Demographic Detail screen contains personal information about the client including gender, race, education, and marital status.

To access this screen from the Client Detail screen click the Demographic Detail tab in the second row of tabs. If you have the proper permissions, you may click the **Edit** button to edit or add any demographics information.



Hiram S ATestool ⚠️

Identifiers [Edit](#)

Current Gender: Transgender MTF
Birth date: 7/7/1977 (39 years old)
ARIES ID: 100020056

Demographics [Edit](#)


AKA:
Sex at Birth: Male
SSN:
Hispanic: Yes (Unknown/Unreported)
Race: 1) Asian (Asian Indian) 2) Asian (Burmese) 3) Pacific Islander (Guamanian)
Marital Status:
Sexual Orientation:
Education Level: No high school
Veteran: Yes
Primary language:
Secondary language:
Place of Death:
Special needs:
Notes: 123456789A123456789B123456789c123456789D123456789e123456789f1234 123456789A123456789B123456789c123456789D12345

ACE Records [Edit](#)

ACE ID's: A00053 A000I0 A000J3 A000L3 A000M1

The demographics information includes the following items:

Current Gender	The current gender of the client.
Birth Date	The client's birth date.

ARIES ID	The client's ARIES identification number.
AKA	Also known as. Any alias used by the client.
Sex at Birth	The client's gender at birth. This will auto-populate on new records based on the client's current gender information.
SSN	The client's Social Security number.
Hispanic	Indicates if the client is Hispanic, and if so, their national origin.
Race	If the client is not Hispanic, the client's race and nationality; up to three are listed.
Marital Status	Clients are listed as: single, married, in domestic partnership, divorced, separated, or widowed.
Sexual Orientation	Clients are listed as: heterosexual, homosexual, lesbian, bisexual, or unsure. They may also be listed as "Declines to State" or "Unknown." Clients under 13-years of age are listed as "Pediatric/Not Applicable."
Education	The highest level of education completed by the client.
Veteran	Indicates if the client is a military veteran.
Primary language	The primary language spoken by the client.
Secondary language	Any other language used by the client.
Place of Death	If the client is deceased, where the client died. The date of death is also listed.
Special Needs	Lists the client's physical disabilities, if any.
Notes	Any additional demographic information about the clients.
ACE Records 	Selecting the Edit button next to ACE Records will direct you to link an ARIES Client record to an ACE Encounter ID.
ACE ID's	If there are Outreach encounters linked with the ARIES client record, the ACE ID will be displayed in this section.

Note on ACE Records:

The final step in closing a successful Outreach case is perhaps the most important: establishing a link between an ACE client and an ARIES client.

To illustrate, let's assume you enroll an ACE (anonymous) client into Outreach Services, and after working with the client, you are successfully able to get the client into care. You escort the client to the Intake Worker at your agency, and verify that the client provides the necessary six identifiers, signs the required ARIES Consent Form, and is enrolled into

ARIES. At that point, the client will exist in ARIES twice: once as an anonymous ACE client, and again as a known ARIES client. More importantly, that client's data will exist in two unrelated sections of ARIES, making it hard to see the big picture. There will be no way to know that the ARIES client came into your agency via Outreach, and the data entered in on the Outreach screens (Services, HIV Tests, Referrals) will not be visible for the ARIES client. Similarly, there will be no way to know the nature of the care that the ACE client received, or whether the ACE client is still engaged in care.

The screen above shows an "ACE Records" section at the bottom of the Demographic Detail subtab in full ARIES.

This feature can be used to link an ARIES client to an ACE client. Linkage requires that you know the ACE ID that was assigned to the client while in Outreach Services. Continuing with the scenario above, when you escort the ACE client to the Intake Worker for ARIES enrollment, you should also provide the Intake Worker with the ACE ID of the client.

After enrolling the client in ARIES, the Intake Worker can click on the Edit button next to ACE Records and will be directed to the [Link New Ace Record](#) screen.

2.4.4 Client Identifiers

The Client Identifiers screen lists the client's gender, birth date, and age.

The screenshot shows a software interface with a navigation bar at the top containing four tabs: CONTACT INFO, DEMOGRAPHIC DETAIL, LIVING SITUATION, and AGENCY SPECIFICS. Below the tabs, the client's name 'Kid R Baby' is displayed in large bold text. Underneath the name, the word 'Identifiers' is followed by a blue 'Edit' button. Below this, the following information is listed: 'Current Gender: Male', 'Birth date: 6/30/2014 (1 years old)', and 'ARIES ID: 100020643'.

If you have the proper permissions, you may click the **Edit** button to edit any information, which takes you to the [Identifiers Edit](#) screen.

2.4.5 Identifiers Edit

Use the Identifiers Edit screen to enter a new client, or edit an existing client's name, mother's maiden name, date of birth, and gender. These fields - collectively known as the extended URN (Unique Record Number) - are used as a unique identifier for the client.

Note: Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

The **URN** is composed of the first and third characters of the client's first and last name, the date of birth and gender.

The **extended URN** (eURN) includes all of the above, **plus** the client's middle initial and the first and third characters of the client's mother's maiden name.

Lash L Larue Demographics

Last Name *

First Name *

Disable ARIES capitalization, save name as entered

Middle Initial *

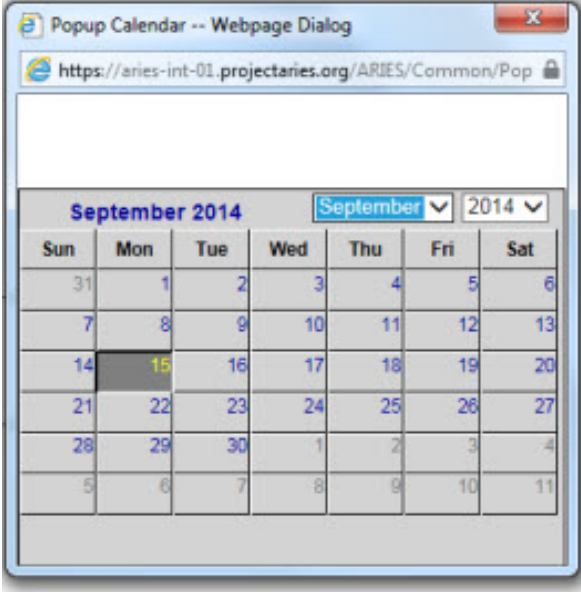
Mother's Maiden Name *

Date of Birth * 



Gender * 

Extended URN LSLR0528813LLR

Last Name	Enter the client's last name.
First Name	Enter the client's first name. Avoid using nicknames or initials.
Disable ARIES capitalization	Check this box to disable the ARIES autocasing feature and save the name as entered.
Middle Initial	Enter the client's middle initial only. Do not enter a period. If the client does not have a middle name, leave the field blank. Note: If the client has no middle initial and the field is blank, ARIES will take this into account in creating an extended URN.
Mother's Maiden Name	For security reasons, the information in this field does not display, even though it was previously entered and saved. ARIES maintains the previously entered Mother's Maiden Name if this field is left blank. If you have reason to believe that the original information was incorrect, enter Mother's Maiden Name on this screen.
Date of Birth	Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.

	 <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p> <p>Note: If the year in Date of Birth is AFTER the end of the RSR report period, the Birth Year is changed to the RSR report end date year.</p>
<p>Gender</p>	<p>Use the dropdown to select the client's gender. In addition to male and female, a client may be transgender MTF (male-to-female) or transgender FTM (female-to-male). A client may also be listed as "Other," "Unknown," or "Refused to Report."</p>
<p>Extended URN</p>	<p>Extended Unique Record Number for the client. Supplied by the system - no input required.</p> <p>The URN is composed of the first and third characters of the client's first and last name, the date of birth and gender.</p> <p>The extended URN includes all of the above plus the client's middle initial and the first and third characters of the client's mother's maiden name.</p>

After completing the fields on the screen:

	<p>Click this button to save your input and return to the Demographic Detail screen.</p>
	<p>Click this button to return to the Demographic Detail screen without saving your input.</p>

2.4.6 Demographics Edit

Notes:

- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "Check the client's CDC Disease Status." ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Clients must self-identify for the Hispanic and Race 1 fields. Because these fields are required in ARIES and by HRSA, you must complete this information to save your entries and advance to the next screen. Use the optional Race 2 and Race 3 fields if clients identify with more than one race. Note that the Hispanic and Race 1, 2 and 3 fields all have corresponding National Origin/Ethnicity fields to the right side of the screen, allowing for more detail in self-identification.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.
- When you have updated the client's records on the Contact Info, Demographic Detail, or Living Situation tab, you must update the Agency Specifics screen by making a selection from the Reason for Status Change dropdown list.

The Demographics Edit screen contains a form that allows you to enter a new client's personal information, or to edit an existing client's personal information.

The demographic fields include:

AKA	Also known as. List any alias or nickname used by the client.
Sex at Birth	Use the dropdown to select the client's gender at birth. This will auto-populate on new records based on the client's current gender information.

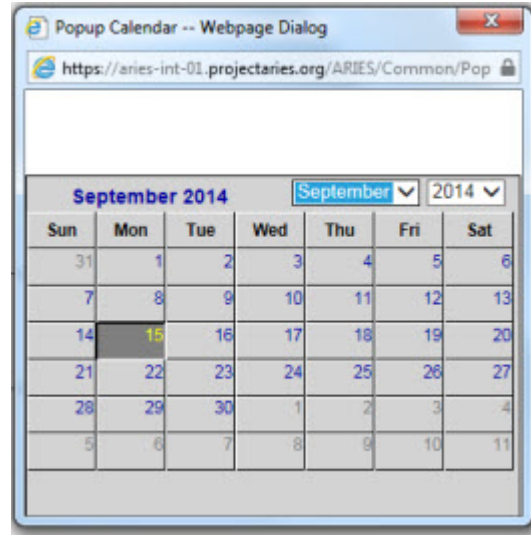
Hispanic	If the client self-identifies as Hispanic, select "Yes" from the dropdown.
Nat'l Orig/Ethnic.	If the client self-identifies as Hispanic and also supplies more details of national origin and ethnicity, add details from the corresponding National Origin/Ethnicity dropdown. Note that to activate the National Origin/Ethnicity dropdown, you must first select "Yes" in the Hispanic dropdown.
Race	<p>Race 1 is required; Race 2 and Race 3 are optional.</p> <p>Since Race 1 is required, you must make a selection from the Race 1 dropdown even if the client only self-identifies as Hispanic. Therefore, if the answer to Hispanic is "Yes" and the client does not self-identify with any other race, you should select "Other" from the Race 1 dropdown. Do not select "White" under Race 1 unless the client self-identifies as both Hispanic and White; or "Black" unless the client self-identifies as both Hispanic and Black.</p> <p>If the client answered "No" to Hispanic, do not select "Other" in Race 1, but make a selection based on the client's self-identification.</p> <p>Select from Race 2 and Race 3 as appropriate for a client of mixed race. If selections are made from the Race 2 and Race 3 dropdowns, make selections from the corresponding National Origin/Ethnicity dropdown lists.</p>
SSN	Enter the client's Social Security Number (SSN). Use the format 123-45-6789.
Marital Status	<p>Use the dropdown to select the client's marital status: single, married, domestic partnership, divorced, separated, or widowed.</p> <p>A domestic partnership is defined as two persons living together in a personal relationship, but not married.</p>
Sexual Orientation	<p>Use the dropdown to select the client's sexual orientation: heterosexual, homosexual, lesbian, bisexual, or unsure. The client may also be listed as "Declines to State" or "Unknown."</p> <p>List clients under 13 years of age as "Pediatric/Not Applicable."</p>
Primary Language	Use the dropdown to select the client's primary spoken language. If the client's primary language is not listed, select "Other" and indicate which language is spoken in the Notes text box.
Secondary Language	Use the dropdown to select a second language, if any, spoken by the client. Example: If the client primarily speaks Tagalog, but can also speak English, select "English" from Secondary Language. If the client's secondary language is not listed, select "Other" and indicate which language is spoken in the Notes text box.
Place of Death	If the client is deceased, use the dropdown list to indicate where the client died: home, hospital, nursing facility, or residence hospice (Residential Care Facility for the Chronically III). If the client died

elsewhere, select "Other" and indicate the location in the text field below.

Date of Death

If the client is deceased, indicate the date in this text field. Use the format MM/DD/YYYY.

You can also use the calendar pop-up by clicking the calendar icon.






Use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.

Notes

- When you enter a date of death for a client in Demographics Edit, the following changes are made to the client's ARIES records:
 - The status displayed on Agency Specifics is "Confirmed Deceased as of [date]."
 - The status displayed on all Program screens is "Deceased on [date]."
 - The Status column for the client in Search Results displays "Confirmed Deceased."
 - The top of all the client's screens displays "[First Name MI Last Name] (Deceased)."
- Before entering the client's date of death, be sure that all services, case notes, referrals, etc. have been entered.
- If the Client has a Date of Death AFTER the end of the RSR report period, the date of death is changed to the RSR report end date.

Caution: You will not be able to enter information that is dated after the date of death. Once a date of death has been entered, it cannot be edited.

	Contact your system administrator if a client has been recorded as deceased in error.
Education Level	Use the dropdown to select the highest level of education completed by the client. If the client did not complete high school but passed an equivalency exam, select "High school diploma/GED."
Veteran	Use the dropdown to indicate whether or not the client is a military veteran.
Special Needs	Use this dropdown to indicate any physical disabilities the client has. Example: If the client requires a walker, select "Mobility." If the client has multiple disabilities, select "More than one" and indicate each disability in the Notes text box.
Notes	Use this text box to enter any pertinent demographics details not listed elsewhere, including primary and secondary languages not listed in the dropdown or any additional special needs the client might have.
	Click this button to save your input and proceed to the Living Situation Edit screen.
	Click this button to save your input and return to the read-only Demographics screen.
	Click this button to return to the read-only Demographics screen without saving your input.

2.4.7 Linking an ACE Record to an ARIES Client

Users with proper permissions are able to associate Anonymous Client Encounter (ACE) record ID's with a known ARIES client. The case may be that an ARIES client has fallen out of care and subsequently been referred to Outreach Services and then brought back into Care. When an ACE ID is linked to an ARIES record, the ACE record may still record going forward. In the case where an ACE ID is UNLINKED from an ARIES record, BOTH records go back to state they were in at the time they were linked. This means that any changes made to the ARIES record in the interim will be lost. Please note that ACE ID records and ARIES Client records must belong to the same agency in order to be linked.

To link an ACE ID to an ARIES record do the following:

- Make sure that you have the ACE IDs or ID that you want to link at hand.
- Find the ARIES Client record to which you want to link the ACE ID or IDs.
- Select the **Edit** button next to ACE ID on the Demographic Detail read only screen.

ACE Records 

The screen will display only **Done** and **Link New** buttons if there are no other ACE IDs associated with the ARIES record. If there are ACE IDs associated, the screen will display the information and may display the **Unlink** button.

Jill O Valence ACE Records						
ACE ID	Date of Birth	Current Gender	Race	Staff	County	Date Linked
A00073		Unknown		outreachworker, outreachworker	Anderson	02/05/2016 01:14 PM

- Select **Link New**.
- Enter the ACE ID into the "ACE ID to link" box.

Jill O Valence Link New ACE Record

Enter an ACE ID and click Search to confirm your ACE selection.

ACE ID to link

Select Search. ARIES will display a table with ACE First Contact Date, Agency Enrollment Date, Date of Birth, Gender, Race, Nat'l Orig/Ethnicity and County variables for the matching ACE record and the current ARIES Client. This will allow you to compare the records in order to determine if you want to proceed with the Link. If you are satisfied that the two records belong to the same client and you want to proceed, select Save to link the records.

Be sure you have the correct clients. Linking can only be reversed under certain circumstances, and only within a very narrow window of time. Once you click Save, all of the historical (longitudinal) data from the ACE client (Services, HIV Tests, Referrals) will be added to the ARIES client. Any non-longitudinal data (demographics) will be used to update the ARIES client, assuming that the ACE data is more current than the ARIES data. When the linkage is complete, the screen below will appear, and the ACE ID of the linked client will be shown at the bottom of the Demographics read-only page.

After selecting Save, ARIES will display a table with the Linked ACE records. You may select Done to return to the Demographic Detail screen or Link New to link another ACE record. Users with appropriate permissions may select Unlink to reverse the link process.

Alias A Adam Link New ACE Record

Enter an ACE ID and click Search to confirm your ACE selection.

ACE ID to link

	ACE	ARIES
ACE First Contact Date	12/2/2014	
Agency Enrollment Date		3/3/2014
Date of Birth	1/1/1985	7/7/1977
Gender	Male	Male
Race	1) Black	1) Asian
Hispanic Nat'l Orig/Ethnicity	Yes	No
County	Winkler	Calaveras

Jill O Valence ACE Records

ACE ID	Date of Birth	Current Gender	Race	Staff	County	Date Linked
A00081	8/9/1978	Male	1) American Indian or Native Alaskan	O'Mara, Mike	Angellina	02/05/2016 01:23 PM
A00073		Unknown		outreachworker_outreachworker	Anderson	02/05/2016 01:14 PM

Note that the screen above allows for linking multiple ACE clients to the same ARIES client. It is not unusual for a client to fall out of care multiple times, and each time that occurs, the client may receive Outreach Services again, but may not be known to be a former ARIES client. The Outreach Worker may begin working with the client as an anonymous client, and eventually get the client into care, and during the ARIES enrollment process (which always involves a search), it may be discovered that the client is already enrolled in ARIES. To accommodate this scenario, the linkage process allows a single ARIES Client record to be linked to multiple ACE client records. However, a given ACE client can only be linked to one ARIES client. For additional information on the purpose and function of linking an ARIES Client to and ACE encounter, see the "Note on ACE Records" section of the [Demographics Detail](#) page.

Please note that the 'linking' of an ACE client to an ARIES client will not be allowed if any ACE referral records exist which do not have an Outcome Date. That is, you will not be able to link ACE records that have 'open' referrals.

If you select an ACE record for linking that does not meet the above criteria, the following instructional error message will appear:

Please correct the following:

- Unable to link ACE record A000A4 because it has one or more open referrals. Please close all ACE referrals prior to linking. Unable to link ACE record A000A4 because it does not have at least one closed referral.

Enter an ACE ID and click Search to confirm your ACE selection.

ACE ID to link

'Linking' will also be disallowed if there are no ACE referral records (for the selected ACE client). Creating an ACE record creates a referral record, but it is possible to deactivate that record, resulting in ACE record that does not meet the linking criteria. A message will appear saying, "Unable to link ACE record "XXXXXX" because it does not have at least one closed referral."

The linking process for ACE-to-ARIES clients also looks at whether there are any ACE services entered that are prior to the ARIES Agency Enrollment Date. If there are any ACE

services prior to the ARIES Agency Enrollment date, you will be warned that they these services will be excluded from the RSR, and you will be given a chance to correct the problem.

The screenshot displays a web interface for linking a new ACE record. At the top, the title is "Laura A Kildare Link New ACE Record" with a yellow warning triangle icon. Below the title, there is a blue instruction: "Enter an ACE ID and click Search to confirm your ACE selection." A text input field labeled "ACE ID to link" contains the value "A00112". To the right of the input field is a blue "Search" button. Below the input field and search button are two buttons: a yellow "Save" button and a blue "Cancel" button. In the center of the screen, a modal dialog box titled "Confirm?" is open. The dialog box contains the following text: "1 ACE services were found with dates prior to the ARIES Agency Enrollment Date of 10/8/2015. These services will be excluded from the RSR unless the ARIES Agency Enrollment Date is reset to 9/10/2015. Reset ARIES Agency Enrollment Date?". At the bottom of the dialog box, there are three buttons: "Yes", "No", and "Cancel".

You must select one of the three following choices:

Yes: The Agency Enrollment Date is reset to the date of the matching Ryan White Eligibility record and the linking process then continues as usual (i.e. you must confirm link).

No: No change is made (services will be excluded from the RSR), but the link then continues as usual (i.e. you must confirm link).

Cancel: Exit the linking process completely with no linking and no changes.

2.4.8 Unlinking an ACE Record from an ARIES Record

Users with proper permissions are able to unlink and Anonymous Client Encounter (ACE) record ID's from an associated ARIES client record. All edits are performed on the ARIES record going forward. In the case where an ACE ID is UNLINKED from an ARIES record, BOTH records go back to state they were in at the time they were linked. This means that any changes made to the ARIES record in the interim will be lost.

To unlink an ACE record from an ARIES Client record, do the following:

- Find the ARIES Client record you want to work with.
- Select the **Edit** button next to ACE Records on the Demographics tab> Demographic Detail sub-tab.

ACE Records **Edit**

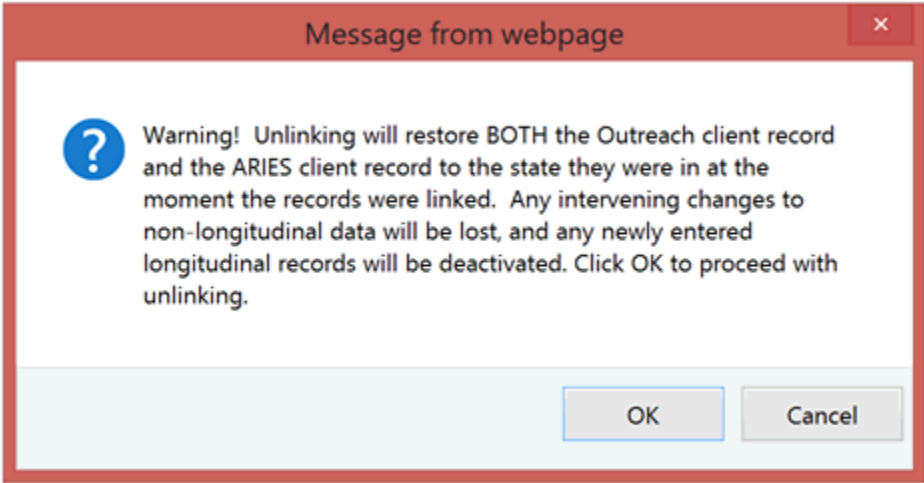
ACE ID's: A00053

ARIES will display a table with the associated ACE IDs. You may select **Done** to return to the Demographics Detail sub-tab, **Link New** to add a new ACE ID to the ARIES record. To unlink, select the **Unlink** button.

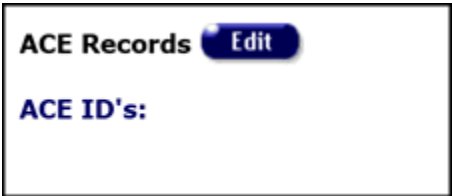
Jill O Valence ACE Records

ACE ID	Date of Birth	Current Gender	Race	Staff	County	Date Linked
A00073		Unknown		outreachworker, outreachworker	Anderson	02/05/2016 01:14 PM

ARIES will display a warning message letting you know that both the ACE record and the ARIES record will be returned to the state they were in at the moment they were linked. The ACE record will have been locked to further editing but the ARIES Client record may have sustained significant edits. To leave the unlink process, select Cancel. To proceed, select OK.



Selecting **OK** will unlink the records. You will be returned to the Demographics Detail read only screen and the ACE ID will no longer appear under ACE ID's.



2.5 Living Situation

The Living Situation screen includes current housing information of the client.

To access this screen:

- Click the [Demographics](#) tab.
- Select the Living Situation tab in the second row of tabs.

Notes

- Living Situation data is longitudinal, as this information changes over time and should be updated at least annually.
- Living Situation records are non-shared under certain conditions, namely, when these records contain a reference to Mental Health or Substance Abuse problems. These may be indicated, for example, by the values "Psychiatric facility" and "Substance abuse treatment facility." As with Needs Assessments, the specific values requiring non-share status will vary for each ARIES installation.

The Living Situation data includes:

Living Situation	
Current Living Situation	The type of residence the client is currently living in, with an "as of" date, and the stability scale in parentheses. Note: ARIES reports a client's Living Situation on the RDR and RSR reports if the Living Situation As Of Date is within or prior to the reporting period.
Housing Assistance	Indicates whether the client is receiving housing assistance. If the client is receiving HUD (Department of Housing and Urban Development) aid, the date the client applied for assistance is also listed.
Most recent HOPWA Assessment Date	Displays the date of the client's most recent HOPWA Assessment, if any.
Related or Affected Individuals Click here for details on this topic.	

- If you have the proper permissions, you may click the **Edit** button to change or add Living Situation data.

Living Situation Verifications

The Living Situation Verifications grid displays client task list information related to verifying the client's type of living situation. This may happen, for example, as part of a recertification or attestation process. The table tells which agency generated the task ('Agency'), the Staff who is assigned the Task ('Verified By'), the Task Outcome Date ('Verified Date') and the date that the Task is due ('Due Date').

The table sorts in reverse date order so that incomplete verifications appear at the top.

Selecting the **Verify** button brings up a popup window with Outcome which defaults to 'Complete,' Outcome Date which defaults to today's date, Save which saves the record and Cancel which returns the user to the read-only page without saving anything.

Living Situation Verification for Hiram S ATestool

Outcome

Outcome Date

2.5.1 Living Situation Edit

Notes:

- Features on this screen may appear different depending on your installation's configuration. Check with your System Administrator for additional information.
- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- ARIES reports a client's Living Situation on the RDR and RSR reports if the Living Situation Since Date is within or prior to the reporting period.
- When you have updated the client's records on the Contact Info, Demographic Detail, or Living Situation tab, you must update the Agency Specifics screen by making a selection from the Reason for Status Change dropdown list.

From the Living Situation screen, click the **Edit** button to access the Living Situation Edit screen. This screen allows you to enter a new client, or to edit an existing client's living situation information.

Adam A Alias Living Situation

As Of Date	Living Situation	Stability Scale	
1/1/2011	Rented room	Stable/Permanent	<input type="button" value="Edit"/> <input type="button" value="New"/>
Housing Assistance	Start Date	End Date	<input type="button" value="Edit"/> <input type="button" value="New"/>
HOPWA	2/1/2012	6/22/2012	<input type="button" value="Save + Next"/> <input type="button" value="Save + Done"/> <input type="button" value="Cancel"/>

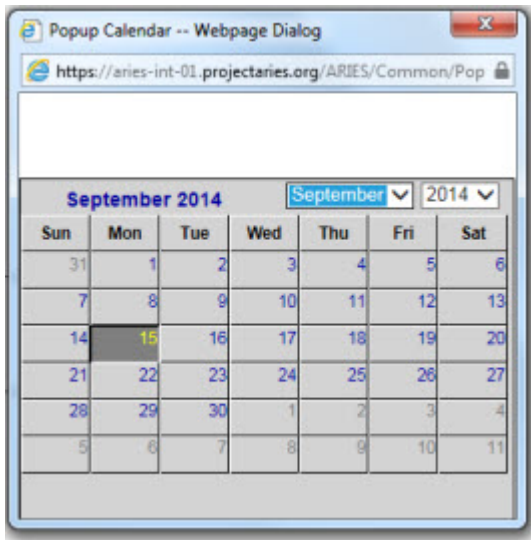
To Create a New Living Situation Record



Click the **New** button under Living Situation. An editable row opens on the screen.

Eyyyy L Hyyy Living Situation

As Of Date	Living Situation	Stability Scale	
<input type="text"/>	<input type="text"/>		<input type="button" value="Save"/> <input type="button" value="Cancel"/>
Housing Assistance	Start Date	End Date	

Complete the fields as follows:






As Of Date	<p>In the text field, enter the date the client first began living in their current situation. Use the format MM/DD/YYYY. Or click the calendar icon to the right of the field.</p>  <p>Use the dropdown lists to select the month and year. Then click the day of the month. The calendar window automatically closes and the As Of Date field is completed.</p>
Current Living Situation	<p>In the dropdown list underneath the date, select the client's current living situation. If the client's situation is not listed, select "Other."</p> <p>Depending on your ARIES installation, after updating this field, you may be required to manually complete the Stability Scale field from dropdown value options; or the system may automatically assign a Stability Scale value.</p>
Stability Scale	<p>This field shows how RSR mapping is done when a client's Living Situation is added or changed. Depending on the user's installation, the field is either</p>

	manually completed from dropdown value options or assigned automatically by ARIES when the user selects a value in the Living Situation field on the Living Situation edit screen. The latest Stability Scale value is displayed on the Living Situation read-only screen.
	Click this button to save your entries and return to the read-only Living Situation Edit screen.
	Click Cancel to discard your entries and return to the read-only Living Situation Edit screen.




To Update an Existing Living Situation Record

Click the **Edit** button to the right of the row to be edited. The fields in the row become editable.

Adam A Alias Living Situation

As Of Date	Living Situation	Stability Scale	
1/1/2011 	Rented room 	Stable/Permanent	  
Housing Assistance	Start Date	End Date	
HOPWA	2/1/2012	6/22/2012	

Complete the fields as follows:

As Of Date	In the text field, enter the date the client first began living in their current situation. Use the format MM/DD/YYYY. Or click the calendar icon to the right of the field. Use the dropdown lists to select the month and year. Then click the day of the month. The calendar window automatically closes and the As Of Date field is completed.
Current Living Situation	In the dropdown list underneath the date, select the client's current living situation. If the client's situation is not listed, select "Other."
Stability Scale	This is a read-only field and changes when the Living Situation dropdown value changes.
	Click this button to save your entries and return to the read-only Living Situation Edit screen.
	Click Cancel to discard your entries and return to the read-only Living Situation Edit screen.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.

	<p>This option is available only to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the record.</p> <p>Note: You will be prompted to confirm the deactivation: "Are you sure you want to deactivate this entry?" To confirm the deactivation, click OK. You will be returned to the read-only Living Situation screen.</p> <p>Clicking Deactivate does not deactivate the client in ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.</p> <p>If you do not want to deactivate the record, click Cancel. You will be returned to the Living Situation Edit screen in Edit mode.</p>
--	--



To Create a New Housing Assistance Record

Click the **New** button under Housing Assistance. An editable row opens on the screen.

Adam A Alias Living Situation

As Of Date *	Living Situation	Stability Scale *
1/1/2011	Rented room	Stable/Permanent
Housing Assistance	Start Date	End Date
HOPWA <input type="text"/>	2/1/2012 <input type="text"/>	6/22/2012 <input type="text"/>

Complete the Housing Assistance fields as follows:




Housing Assistance	If the client is receiving housing assistance, select the type of assistance from the dropdown.
Start Date	If the client is receiving HUD (Department of Housing and Urban Development) assistance, enter the date when the client began receiving this assistance. Use the format MM/DD/YYYY, or click the calendar icon to the right of the field. Use the dropdown lists to select the month and year. Then click the day of the month. The calendar window automatically closes and the Start Date field is completed.
End Date	Enter the end date, if any, by the same method as Start Date.
	Click this button to save your entries and return to the read-only Living Situation Edit screen.
	Click Cancel to discard your entries and return to the read-only Living Situation Edit screen.

To Update an Existing Housing Assistance Record




Click the **Edit** button to the right of the row to be edited. The fields in the row become editable.

Adam A Alias Living Situation		
As Of Date *	Living Situation	Stability Scale *
1/1/2011	Rented room	Stable/Permanent
Housing Assistance	Start Date	End Date
HOPWA	2/1/2012	6/22/2012
HOPWA	<input type="text"/>	<input type="text"/>
		<input type="button" value="Save"/> <input type="button" value="Cancel"/>

Complete the Housing Assistance fields as follows:

Housing Assistance	If the client is receiving housing assistance, select the type of assistance from the dropdown.
Start Date	If the client is receiving HUD (Department of Housing and Urban Development) assistance, enter the date when the client began receiving this assistance. Use the format MM/DD/YYYY, or click the calendar icon to the right of the field. Use the dropdown lists to select the month and year. Then click the day of the month. The calendar window automatically closes and the Start Date field is completed.
End Date	Enter the end date, if any, by the same method as Start Date.
	Click this button to save your entries and return to the read-only Living Situation Edit screen.
	Click Cancel to discard your entries and return to the read-only Living Situation Edit screen.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is available only to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the record.</p> <p>Note: You will be prompted to confirm the deactivation: "Are you sure you want to deactivate this entry?" To confirm the deactivation, click OK. You will be returned to the read-only Living Situation screen.</p> <p>Clicking Deactivate does not deactivate the client in ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.</p> <p>If you do not want to deactivate the record, click Cancel. You will be returned to the Living Situation Edit screen in Edit mode.</p>

Back on the read-only Living Situation Edit screen after completing the fields as necessary:

	Click this button to save your input and proceed to the Agency Specifics Edit screen.
	Click this button to save your input and return to the read-only Living Situation screen.
	Click this button to return to the read-only Living Situation screen without saving your input.

2.5.2 Related/Affected Individuals

The Related/Affected Individuals lists other clients associated with the client who is HIV-negative, as well as those with unknown HIV status. An affected client can be a family member or partner, but they must be linked to an infected client who is receiving services. Affected clients may be eligible for services like housing assistance or transportation.

For example, if the client is an HIV+ mother, her children may be eligible for services such as meals and daycare. Please note that related or affected individuals have their own separate client records. Clicking an individual's name takes you to their client record.

Indeterminate Infants under 21 Months Old

Note that indeterminate infants should not be enrolled as Related/Affected Individuals. An indeterminate infant is a child whose mother was HIV+ at the time of the birth, and who is less than 21 months old. Such infants are considered "indeterminate" since their immune system is not mature enough to produce antibodies to the HIV virus, making it impossible to know their true HIV status. Be sure to enroll an indeterminate infant as a regular ARIES client and use a CDC Disease Stage of "Pediatric Indeterminate."

Clients over 21 Months Old

CDC Disease Stage "Indeterminate" is not valid for clients over 21 months old. A client who is 21 months or older and has previously been assigned a CDC Disease Stage of "Pediatric indeterminate" or "Pediatric, confirmed HIV-positive" should be reported on the RSR as "Unknown."

Note: If a user attempts to save the Basic Medical Edit page with a CDC Disease Stages of "Pediatric indeterminate" or "Pediatric, confirmed HIV-positive" and the client is 21 months or older, ARIES will display the message "A CDC Disease Stage of 'Pediatric Indeterminate' or 'Pediatric, confirmed HIV-positive' applies only to children under 21 months."

- A similar rule for "Pediatric, confirmed HIV-positive" is NOT required, since these clients are reported on the RSR as HIV-positive regardless of age.

To add a related or affected individual for a client:

- Go to the client's read-only Living Situation tab and click the **New** button.



This takes you to the [Related/Affected Individuals Edit](#) screen, where you may add a related/affected individual for the client.

To edit the relationship between the affected individual and the client, go to the read-only Living Situation tab for the related/affected individual and click the **Edit Relationship** button, which takes you to the [Related/Affected Individual Relationship Edit](#) screen.

Note: If you save a record for a Related/Affected individual on the Basic Medical Edit screen and the Related/Affected client's CDC Disease stage is changed to anything other than 'Unknown' or 'HIV Negative', ARIES will no longer classify them as 'Related/Affected.'

- Before you save the record, you will receive the following confirmation prompt: **"Click OK to save the change and convert the client to a non-Related/Affected client."**

2.5.3 Related/Affected Individuals Edit

The Related/Affected Individuals Edit screen allows you to create a new related/affected individual record for the client or edit an existing related/affected individual record for the client.

When a new related/affected record is created, ARIES links that individual to the related HIV+ client. Once the record is created, new services can be entered for the related/affected individual.

Notes:

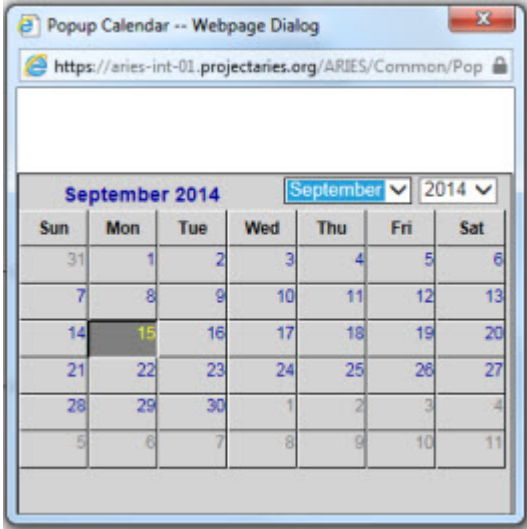
- If you save a record for a Related/Affected individual on the Basic Medical Edit screen and the Related/Affected client's CDC Disease stage is changed to anything other than "Unknown" or "HIV Negative," ARIES will no longer classify them as "Related/Affected."
- When you enter a new client a red message appears next to the client's name on the screen. This message reads, **"Check the client's CDC Disease Status."** ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

Related/Affected Individuals for Jxn M Axa

<p>Last Name * <input type="text"/></p> <p>First Name * <input type="text"/></p> <p><input type="checkbox"/> Disable ARIES capitalization, save name as entered</p> <p>Middle Initial <input type="text"/></p> <p>Date of Birth * <input type="text"/></p> <p>Mother's Maiden Name * <input type="text"/></p> <p>Gender * <input type="text"/></p> <p>Relationship * <input type="text"/> (Other) <input type="text"/></p> <p>Enrollment Date * 4/4/2010 <input type="text"/></p> <p>Enrollment Status * Active <input type="text"/></p> <p>Status As Of * 4/4/2010 <input type="text"/></p> <p>Date of Death <input type="text"/></p> <p>Hispanic * <input type="text"/></p> <p>Race 1 * <input type="text"/></p> <p>Race 2 <input type="text"/></p>	<p><input type="checkbox"/> Living with client</p> <p>Street <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p> <p>ZIP Code <input type="text"/></p> <p>County * <input type="text"/></p> <p>Phone 1 <input type="text"/></p> <p>Living Situation * <input type="text"/></p> <p>Annual Household Income * <input type="text"/></p> <p># People in HH <input type="text"/></p> <p>Federal Poverty Level <input type="text"/></p> <p>Medical Insurance * <input type="text"/></p>
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Fields marked with an asterisk (*) are required fields.



Complete the Related/Affected Individuals fields as follows:

Last Name	Enter the individual's last name.
First Name	Enter the individual's first name. Do not use nicknames.
Middle Initial	Enter the individual's middle initial.
Date of Birth	<p>Enter the individual's date of birth. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Date of Birth" field.</p>  <p>Use the dropdown lists to select the month and year. Then click the day of the month. The calendar window automatically closes and the "Date of Birth" field is completed.</p>
Mother's Maiden Name	Enter the individual's mother's maiden name.
Gender	Use the dropdown to select the individual's gender. In addition to male and female, an individual may be transgender MTF (male-to-female) or transgender FTM (female-to-male). An individual may also be listed as "Other," "Unknown," or "Refused to Report."
Relationship	<p>Use the dropdown to select the individual's relation to the client. Select one of the following: Parent, Partner, Spouse, Son, Daughter, Sibling, or Roommate.</p> <p>If the relationship is not listed, select "Other" and enter the relationship in the Other text field below.</p>
Enrollment Date	Enter the individual's enrollment date. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Enrollment Date" field. Use the dropdown to select the month and year. Then click the day of the

	month. The calendar window automatically closes and the "Enrollment Date" field is completed.
Enrollment Status	<p>Use the dropdown to select the status of enrollment. The status can be one of the following:</p> <p>Active - The client is eligible and currently receiving services.</p> <p>Inactive - The client is no longer receiving services.</p> <p>Disenrolled - The client is no longer eligible for services.</p> <p>Lost to Follow-up - The agency has lost contact with the client after follow-up call or visit.</p> <p>Discharged - The client has had a successful outcome and no longer require services. Example: If your agency provides housing and has placed the client, the client can then be discharged.</p> <p>Reported Deceased - The client has been reported as passed away.</p> <p>Confirmed Deceased - The client has been confirmed as having passed away.</p> <p>Unknown/Unreported - The client's status is unknown.</p>
Status As Of	Enter the date of the individual's status. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Status As Of" field. Use the dropdown to select the month and year. Then click the day of the month. The calendar window automatically closes and the "Status As Of" field is completed.
Date of Death	If the individual is deceased, enter the date of death. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Date of Death" field. Use the dropdown to select the month and year. Then click the day of the month. The calendar window automatically closes and the "Date of Death" field is completed.
Hispanic	This is a required field. Use the dropdown to indicate whether or not the individual is Hispanic.
Race 1	Because Race 1 is required, you must make a selection from this dropdown. If the answer to Hispanic is Yes, you should select Other from the Race 1 dropdown. Do not select White under Race 1 unless the client self-identifies as both Hispanic and White; or Black unless the client self-identifies as both Hispanic and Black.
Living with Client checkbox	Check this box if the individual lives with the client.
Street	If the individual does not live with the client, enter the individual's street address.
City	Enter the city in which the individual lives.
State	Use the dropdown to select the state in which the individual lives.

Zip Code	Enter the ZIP code where the individual lives.
County	From the dropdown, select the county where the individual lives.
Phone 1	Enter the individual's primary phone number. Include the area code and use hyphens to separate the numbers. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345.
Living Situation	Use the dropdown to select the individual's current living situation. Select "Other" if none of the options match. The individual may also be listed as "Unknown" or "Refused to Answer."
Annual Household Income	Enter the dollar amount of the individual's estimated annual household income. Example: If the client lives with the individual, enter their combined income.
People in HH	Enter the number of people living in the household.
Federal Poverty Level	This percentage is calculated automatically. This field will be completed when you save the form, and cannot be edited.
Medical Insurance	Use the dropdown to select the individual's primary medical insurance. If the individual is uninsured, select "No insurance."

After completing the fields on the screen:

	Click this button to save your input and return to the Living Situation screen.
	Click this button to return to the Living Situation screen without saving your input.

2.5.4 Related/Affected Individual Relationship Edit

Use the Related/Affected Individual Relationship Edit screen to change the relationship between a client and a related or affected individual. Example: If a client marries their partner, change their relationship in this screen.

Notes:

- If you save a record for a Related/Affected individual on the [Basic Medical Edit](#) screen and the Related/Affected client's CDC Disease stage is changed to anything other than 'Unknown' or 'HIV Negative', ARIES will no longer classify them as 'Related/Affected.'
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk

are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

John A Porter Related/Affected Individuals

Related to Fred Smith

Relationship * Partner

(Other)




Living with client

Complete the fields as follows.

Fields marked with an asterisk (*) are required fields.

Related to	Displays the related/affected individual's name and is not editable.
Relationship	Use the dropdown to indicate the individual's relationship to the client. If the relationship is not listed in the dropdown, select "Other" and enter the relationship in the adjacent text field.
Living with Client checkbox	Check this box if the individual lives with the client.

After completing the fields on the screen, click on one of the following:

	Click the Save button to save your input and return to the Living Situation screen.
	Click the Cancel button to return to the Living Situation screen without saving your input.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is only available to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the relationship between the Related/Affected Individual and the client. You are prompted to confirm the deactivation. Once deactivated, the client is no longer a Related/Affected Individual and will no longer appear on the Living Situation screen.</p>

	Clicking the Deactivate button does not deactivate the client with ARIES; it only deactivates the relationship between the Related/Affected Individual and the client.
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2.5.5 Agency Specifics

The Agency Specifics screen contains all the relevant agency information about the client. To access this screen from the Client Detail screen, click the Agency Specifics tab in the second row of tabs. If you have the proper permissions, click the **Edit** button to update any agency specifics.

The Agency Specifics information includes:

Share Data	Indicates whether the client has agreed to share their records with other agencies (this helps expedite the intake process at other agencies).
Agency Name	The name of the agency with which the client is enrolled.
Agency Status	Lists the client's status with the agency and the date when reported.
Reason for Status Change	If the client's status has changed, the reason is displayed in this field.
Agency Enrollment Date	The date the client first enrolled with the agency. Note: If a client's Enrollment Status As-Of Date is AFTER the RSR reporting period, the client should be reported as "Active" on the RSR regardless of the value in the Enrollment Status field.
Referral	The source that referred the client, with referral date.
Client ID1, Client ID2, Client ID3, Client ID4	The client's agency-assigned identifier. If your agency employs multiple IDs, the second one is also listed. Please note that Client ID 3 and Client ID 4 are visible to all users on the Read Only and Edit screens but they are editable only by users in the Partner ARIES Administrator group.

Agency User Fields	The two Agency User Fields may be used to store any data your agency chooses. These fields are particularly useful for identifying groups or subsets of clients within your agency. You must decide on the codes or words you want to use in these fields to identify each group or subset of clients. You must also be careful to enter those codes or words correctly. Data you enter in these fields is available in Crosstab and Ad Hoc reports.
Agency Name	Displays the name of the agency where the client is enrolled.
Agency Status	Displays the as-of date for the client's current status.

Please note that when a client is enrolled at an agency or when their enrollment status is changed on the Agency Specifics tab, an enrollment record is automatically generated and added to the history table on the [Ryan White Program](#) sub-tab.

2.5.6 Agency Specifics Edit

Use the Agency Specifics Edit screen to edit existing information or add new relevant agency information about the client.

Proper permission is required to edit all Agency Specifics fields. Share Data status can only be changed by a supervisor.

Enrollment Date, Referral Date, and Referral Source are entered only once and may not be edited.

Notes:

- When you enter a new client, a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.
- If a client's Enrollment Status As Of Date is AFTER the RSR reporting period, the client should be reported as "Active" on the RSR regardless of the value in the Enrollment Status field.
- If the Agency Specifics enrollment date is AFTER the earliest service date within the report period, the enrollment date is reset to the earliest service date within the report period.

Special Notes on Agency Specifics Permissions

- For ARIES users with Agency Specifics *Change* permission, the **Edit** button is displayed on the Agency Specifics screen for any client.
- For users with Agency Specifics *Create* permission, the **Edit** button is **not** displayed if any of the following fields has been completed and saved:
 - Referral Date
 - Referral Source

- o Agency Client ID 1
- o Agency Client ID 2
- o Alert.
- If these fields have not been completed and saved, then the **Edit** button **is visible** to users with Agency Specifics Create permission. For these users, the remaining fields on Agency Specifics Edit are grayed out.

Agency Specifics for Williams J Favuzza (check the client's CDC Disease Stage)

Agrees to Share Data Yes No

Agency Status * Active

Status as of Date * 10/1/2014

Enrollment Date * 10/1/2014

Agency Client ID 1

Agency Client ID 2

Agency Client ID 3

Agency Client ID 4

Agency User Field 1

Agency User Field 2

Client Alert

Reason for Status Change Other

if Other New Enrollment

Referral Date

Referral Source

if Other

Alert Saved By

Alert Saved Date

Complete the Agency Specifics fields as follows:

Fields marked with an asterisk (*) are required fields.

Agrees to Share Data

When the client is first entered into the system, they are asked whether or not they wish to share their information with other agencies (this helps expedite the intake process at other agencies), and either the **Yes** or **No** radio button is selected.

If the client previously did not agree to share data but now wants to, ask them to review and sign the ARIES consent form, allowing their record to be shared.

If they agree to share their data and sign the form, select the **Yes** radio button next to "Agree to Share Data."

Agency Status

Select the client's status with your agency. The status can be one of the following:

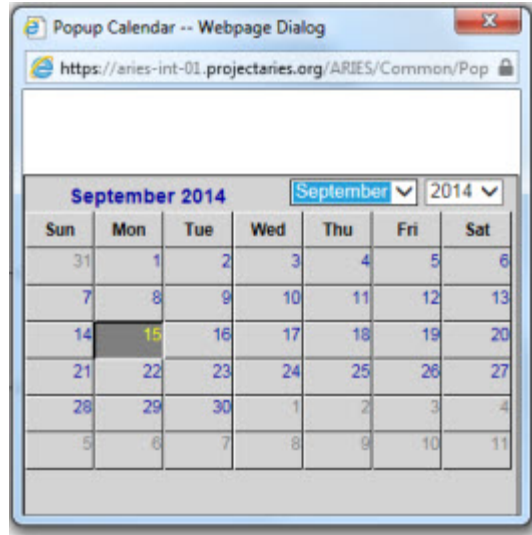
Active	Client is eligible and currently receiving services.
Inactive	Client is no longer receiving services.
Disenrolled	Client is no longer eligible for services.
Lost to Followup	The agency has lost contact with the client and has not made a follow-up call or visit.
Discharged	The client has had a successful outcome and no longer requires services. <u>Example:</u> If your agency provides housing and has placed the client, they can then be discharged.

Reported Deceased	Client has been reported as passed away, but this is unconfirmed.
Confirmed Deceased	Client has passed away, and this has been confirmed.
Unknown/Unreported	Client's status is unknown.
Notes	
<ul style="list-style-type: none"> • Changing a client's status to a status other than Active may also require a change to the client's program status from the Programs Tab. <u>Example</u>: If a client is now deceased, their status would be changed in all the specific programs in which they are enrolled in your agency (e.g., EIP, HOPWA, etc.). • If you select Confirmed Deceased from the Agency Status dropdown list on Agency Specifics, the RSR and other reports will report the client as deceased, but the Date of Death does not update in Demographics or Programs. • If the client's agency status is changed, the next two fields - Reason for Status Change and Status as of Date - must also be changed. 	

Reason for Status Change If the client's status has changed, list the reason in this text field. If the reason is not listed in the dropdown, select "Other" and indicate the reason in the text field below.

- Notes**
- If you have updated the client's records on the Contact Info, Demographic Detail, or Life Situation tab and have progressed to Agency Specifics, you must complete the Reason for Status Change field.
 - Under Reason for Status Change, the "If Other" text field is locked unless the value in the Reason dropdown is "Other." When a user has selected a valid option from the Reason dropdown (any option except "Other"), any existing text in the If Other field is deleted before the field is locked.

Status as of Date If the client's agency status has changed, enter the date of the client's status change. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Status as of Date" field.



For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.

Agency Enrollment Date Enter the date the client first enrolled with the agency. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Agency Enrollment Date" field.

For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.

Note: This information can only be entered once and cannot be edited.

Referral Date Enter the date the client was referred to the agency. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Referral Date" field.

For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.

Note: This information can only be entered once and cannot be edited.

Referral Source Use the dropdown to select the source that referred the client, i.e., MD (medical doctor), Case Manager, RN (registered nurse), Self, or Other. If "Other" is selected, enter the source in the "Other" text field below.

Note: This information can only be entered once and cannot be edited.

Agency Client IDs 1 and 2 If your agency employs client identifiers, enter them in the Agency Client ID text fields.

Agency Client IDs 3 and 4 These fields are visible to all users but are editable only by users in the Partner ARIES Administrator group. These fields are intended to assist with Import procedures.

Agency User Fields 1 and 2 If your agency uses these two fields, enter data in either as appropriate.

Client Alert Use the text box field to enter any pertinent details about dealing with the client, such as sensitive health problems or behavioral issues. Example: If a client has a violent history, it is important for all staff persons to be aware of this. This is a scrollable field.




When a client alert is entered, a yellow triangle icon appears next to the client's name in the Client Details screens. Users may hover the mouse over it to view a message about the client. The display will also include the name of the user who entered or edited the message and the date of entry. Clicking this icon will open an alert box containing the alert message.

Note: After saving updates to Agency Specifics, the Client Alert on any page changes so that your name is displayed. Click on the yellow triangle on most screens to see a pop-up with the client alert message.

Notes:

- When you have updated the client's records on the Contact Info, Demographic Detail, or Living Situation tab and you progress to Agency Specifics, make a selection from the Reason for Status Change dropdown list. If you select "Other" from the dropdown, type a reason in the "if Other" window just below it.
- After you save updates to Agency Specifics for a client, the Client Alert on any page changes so that your name is displayed. Click on the yellow triangle on most screens to see a pop-up with the client alert message.

After completing the fields on the screen, click on one of the following:

	Click the Save + Next button to save your input and advance to the Eligibility Documents Edit screen.
	Click the Save + Done button to save your input and return to the Agency Specifics screen.
	Click the Cancel button to return to the Agency Specifics screen without saving your input.

2.6 Eligibility

The Eligibility screens contain the records of the client's eligibility documents required for your agency's services as well as financial records and insurance information. To access this screen, click the Eligibility tab in the top row of tabs.



This information is used to determine which services the client is eligible for. Accurate details help ensure the client receives all the benefits to which they are entitled.

The Eligibility screens include:

- [Eligibility Documents](#)

- [Financial](#)
- [Insurance](#)

2.6.1 Eligibility Documents

The Eligibility Documents screen contains a table listing the client's eligibility documents. To access this screen, click the Eligibility tab from the top row of tabs.



The headings of the table columns in this screen are as follows:

Type	The type of eligibility document.
Doc Date	When the document was dated.
Obtained	When the document was received by the agency.
Expires	When the document expires (if applicable). Example: If the document is a driver's license, when the license expires.
Source	The source from which the document was obtained.
Location	The agency that received the document. Clicking a Location link will take you to that agency's Contact Information screen.
Notes	Any additional information pertaining to the eligibility document.

If you have the proper permissions, click the **Edit** button to change or add any eligibility document information.

2.6.2 Eligibility Document Edit

Note: When you enter a new client, a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.

Users can (1) upload a file to a newly-created record, (2) add a file to an existing record, (3) replace an old file in an existing record with a new file, or (4) delete a file from an existing record.

Garance I Arletty Eligibility Documents							
Type	Pending	Doc Dated	Obtained	Expires	Source	Location	Note
HIV Letter of Diagnosis	No	2/10/2010	2/28/2010	3/31/2014	Client	DSHS	
Proof of Residency	No	10/11/2009	2/28/2010	6/30/2015	Client	DSHS	Lease agreement Client to bring in 2009 tax returns.
Proof of Income	Yes					DSHS	

To edit an existing record, click the **Edit** button. Note that to edit an existing record, the record must be in a pending status (indicated by "Yes" in the Pending column).

If you need to make changes to a record that is not currently in a pending status, you must contact your Administrative Agency or to have the record updated. The exceptions to this rule are those who work at Administrative or Partner level agencies.

To create a new eligibility document record, click the **New** button. There is a new field called File with a Browse button to the right of it. Click Browse to locate and select the file on your computer or network. Its name should now appear in the File field. Continue to fill out or edit the other fields (e.g., Document Date, Expiration Date, Source) for the record. Click Save and then click Done.

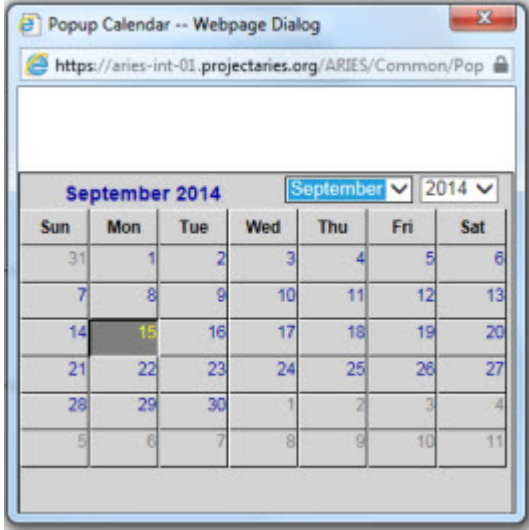
Note: If you click **New** inadvertently, do not click **Save** on the new row or you will create a new record with the default of "ADAP" in the Type field. To remove a new row after clicking **New** by accident, click **Cancel**.




Both actions take you to the Eligibility Documents Edit screen.

Garance I Arletty Eligibility Documents							
Type	Pending	Doc Dated	Obtained	Expires	Source	Location	Note
HIV Letter of Diagnosis	No	2/10/2010	2/28/2010	3/31/2014	Client	DSHS	
Proof of Residency	No	10/11/2009	2/28/2010	6/30/2015	Client	DSHS	Lease agreement Client to bring in 2009 tax returns.
Proof of Income	Yes					DSHS	
ADAP	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	DSHS	<input type="text"/>




Complete the Eligibility Documents row as follows.

Column	Description								
Type	Select the document type from the dropdown list:								
	<table border="1"> <tr> <td>Proof of Residency</td> <td>Any document that establishes the client's place of residence. This can include driver's license, lease agreement, or business mail addressed to the client.</td> </tr> <tr> <td>HIV Letter of Diagnosis</td> <td>A letter confirming the client's HIV+ status.</td> </tr> <tr> <td>Proof of Income</td> <td>This includes current pay stubs, Social Security check stubs, or other assistance check stubs.</td> </tr> <tr> <td>Release of Information</td> <td>This document allows the agency to contact other entities for referrals for the client. For example, this release would permit a case manager to consult an outside physician about a possible referral.</td> </tr> </table>	Proof of Residency	Any document that establishes the client's place of residence. This can include driver's license, lease agreement, or business mail addressed to the client.	HIV Letter of Diagnosis	A letter confirming the client's HIV+ status.	Proof of Income	This includes current pay stubs, Social Security check stubs, or other assistance check stubs.	Release of Information	This document allows the agency to contact other entities for referrals for the client. For example, this release would permit a case manager to consult an outside physician about a possible referral.
	Proof of Residency	Any document that establishes the client's place of residence. This can include driver's license, lease agreement, or business mail addressed to the client.							
	HIV Letter of Diagnosis	A letter confirming the client's HIV+ status.							
Proof of Income	This includes current pay stubs, Social Security check stubs, or other assistance check stubs.								
Release of Information	This document allows the agency to contact other entities for referrals for the client. For example, this release would permit a case manager to consult an outside physician about a possible referral.								

	<table border="1"> <tr> <td data-bbox="488 199 699 323">ARIES Consent Form</td> <td data-bbox="699 199 1419 323">This document permits your agency to share the client's records with other agencies, which can expedite the intake process at other agencies.</td> </tr> <tr> <td data-bbox="488 323 699 447">ARIES Consent Form</td> <td data-bbox="699 323 1419 447">This document acknowledges client's agreement to receive services from your Agency</td> </tr> <tr> <td data-bbox="488 447 699 550">Picture ID</td> <td data-bbox="699 447 1419 550">Identification can be a current driver's license or state-issued ID card, passport, or military ID.</td> </tr> <tr> <td data-bbox="488 550 699 646">ADAP</td> <td data-bbox="699 550 1419 646">AIDS Drug Assistance Program (ADAP) identification card.</td> </tr> <tr> <td data-bbox="488 646 699 770">HOPWA</td> <td data-bbox="699 646 1419 770">Documentation confirming client's participation in Housing Opportunities for Persons With AIDS (HOPWA).</td> </tr> <tr> <td data-bbox="488 770 699 869">HIPAA</td> <td data-bbox="699 770 1419 869">Documentation acknowledging Health Insurance Portability & Accountability Act.</td> </tr> </table>	ARIES Consent Form	This document permits your agency to share the client's records with other agencies, which can expedite the intake process at other agencies.	ARIES Consent Form	This document acknowledges client's agreement to receive services from your Agency	Picture ID	Identification can be a current driver's license or state-issued ID card, passport, or military ID.	ADAP	AIDS Drug Assistance Program (ADAP) identification card.	HOPWA	Documentation confirming client's participation in Housing Opportunities for Persons With AIDS (HOPWA).	HIPAA	Documentation acknowledging Health Insurance Portability & Accountability Act.
ARIES Consent Form	This document permits your agency to share the client's records with other agencies, which can expedite the intake process at other agencies.												
ARIES Consent Form	This document acknowledges client's agreement to receive services from your Agency												
Picture ID	Identification can be a current driver's license or state-issued ID card, passport, or military ID.												
ADAP	AIDS Drug Assistance Program (ADAP) identification card.												
HOPWA	Documentation confirming client's participation in Housing Opportunities for Persons With AIDS (HOPWA).												
HIPAA	Documentation acknowledging Health Insurance Portability & Accountability Act.												
<p>Pending</p>	<p>If the client has not yet provided the document to the agency, check the Pending checkbox.</p> <p>Note: If an Eligibility Document is not marked as pending, once it is saved, it becomes a read-only record and cannot be edited again. If you need to make changes to a record that is not marked pending, you must contact your Administrative Agency to have the record updated. The exceptions to this rule are those who work at Administrative or Partner level agencies.</p>												
<p>Doc Dated</p>	<p>Enter the date of the document. Format MM/DD/YYYY. For example, if the client brings in a piece of business mail, enter the postmark date. If the client brings in a passport, enter the date it was issued.</p> <p>You may also enter the date via the pop-up calendar.</p> 												

	Use the dropdown lists to select the month and year; then click the specific date to enter it into the text field. The calendar window closes automatically.
Obtained	Enter the date the document was received by the agency. Format MM/DD/YYYY.
Expires	Enter the date of expiration, where applicable. Format MM/DD/YYYY.
Source	Enter the document source. Example: If the client brings in the document, type "Client" in this window.
Location	ARIES automatically enters your agency's name.
Note	In the text field, enter any other information regarding the document. Example: You may type "Driver's License" if the client has brought in a picture ID of this type.
	Click the Save button to save your input and return to the Eligibility Documents screen.
	Click the Cancel button to return to the Eligibility Documents screen without saving your input.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate the Eligibility Document. You are prompted to confirm the deactivation. Once deactivated, the Eligibility Document will no longer appear on the Eligibility Documents screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the Eligibility Document.</p>

After completing the fields on the screen, click on one of the following:

	Click the Save + Next button to save your input and proceed to the Financial Edit screen.
	Click the Save + Done button to save your input and return to the read-only Eligibility Documents screen.
	Click the Cancel button to return to the read-only Eligibility Documents screen without saving your input.

2.6.3 Financial

The Financial screen displays all of the client's financial information including household income and assets. To access this screen:

To access this screen select Eligibility from the top row of tabs, then click the Financial tab from the second row of tabs.

Financial [Edit](#)

Employment: Part-time
Public Assistance:
Children in Household:
HIV+ People in Household:
Current Income (Monthly)

Type	Amount	Shared by	Poverty Index
Client	\$233		
Household			%
Family			%

Income Detail/Assets

Source (Monthly):	Amount:
Employment/Wages	\$233.00
Total	\$233.00

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

Income History (Monthly)

Date	Client	Household	Family
------	--------	-----------	--------

Income Verifications

Verified Date	Verified By	Agency	Due Date
	Albert Analyst	Shasta Test Services	8/22/2016

[Verify](#)

Financial

The left side of the screen displays the client's employment situation, whether they receive public assistance, and how many children live in the client's household. Also listed is how many HIV+ people live in the household, including the client.

The following is displayed below this area:

Current Income (Monthly)

- Client - The first row displays the client's personal income and whether the amount is earned annually or monthly.
- Household - The second row displays the combined income of everyone who lives in the client's household, whether the amount is earned annually or monthly, how many people live in the household (including the client), and the poverty index of the household.

Note: Poverty guidelines are established each year by the federal Department of Health and Human Services and are published annually in the Federal Register, usually in January or February.

- Family - The third row in the table lists the combined income of everyone related to the client (including the client), whether the amount is earned monthly or annually, how many people are in the family (including the client), and the poverty index of the client's family.

Income History (Monthly)

The table on the bottom of the screen shows the client, household and family income history.

Income Detail/Assets

Source (Monthly)

On the right side of the screen is a table listing the client's sources of income. If the client has no income, "Client has no income" is shown next to Income Detail/Assets.

The list below the right side indicates whether the client is a homeowner, whether they own a car, and the total value of their other assets.

If you have the proper permissions to change or edit the client's financial information, click the **Edit** button, which takes you to the [Financial Edit](#) screen.

Income Verifications


The Income Verifications grid displays client task list information related to verifying the client's income. This may happen, for example, as part of a recertification or attestation process. The table tells which agency generated the task ('Agency'), the Staff who is assigned the Task ('Verified By'), the Task Outcome Date ('Verified Date') and the date that the Task is due ('Due Date').

The table sorts in reverse date order so that incomplete verifications appear at the top.

Selecting the **Verify** button brings up a popup window with Outcome which defaults to 'Complete,' Outcome Date which defaults to today's date, Save which saves the record and Cancel which returns the user to the read-only page without saving anything.

Income Verification for Hiram S ATestool

Outcome ▼

Outcome Date 

2.6.4 Financial Edit

Notes:

- When you enter a new client, a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.
- When completing monetary fields, do not enter the dollar sign. ARIES will supply the dollar sign after you save the record.

Use the Financial Edit screen to edit the client's existing income and asset information, or add new financial information. The screen is separated into the five sections: Client Income, Household Income, Family Income, Assets and Income History.

Note: If you are entering income for the client in any field, be sure to uncheck "No source of income." Otherwise you will not be able to enter the income.

Financial for Lash L Larue

CLIENT INCOME

(Amounts are monthly) **Employed** **Public Assistance**

Employment/Wages <input type="text" value="1,500.00"/>	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" value="300.00"/>	Worker's Compensation <input type="text"/>	Gift <input type="text"/>
Social Security Retirement <input type="text"/>	TANF CalWORKS <input type="text" value="other 1"/>	<input type="text"/>
Gen Assist/Gen Relief GA/GR <input type="text"/>	Veterans Benefits/VA <input type="text" value="other 2"/>	<input type="text"/>
Unemployment/UI <input type="text"/>	Alimony/Child Support <input type="text" value="other 3"/>	<input type="text"/>
Total <input type="text" value="1,800.00"/>	<input type="checkbox"/> No source of income	Food Stamps <input type="text"/>

HOUSEHOLD INCOME

Monthly Household Income *

People in Household * **Percent Federal Poverty Level**

Children in Household **# HIV+ People in Household**

FAMILY INCOME

Monthly Family Income

People in Family **Percent Federal Poverty Level**

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

Complete the Financial Edit fields as follows:
 Fields marked with an asterisk (*) are required fields.

Client Income Section

(Amounts are monthly)

Employed	Use the dropdown to select the client's type of employment, e.g., full-time, part-time, not employed, other, or unknown. Select "Other" if the client is a student, a volunteer, or other.
Employment/Wages	Note: If the client has a source of income, you cannot enter it in this field without first <i>unchecking</i> the "No source of income" checkbox. Enter the dollar amount of wages the client derives from employment. Use the format as in the following example: 1,500.00. No dollar sign.
Supp Security Income/SSI	If the client receives SSI, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.

Soc Sec Disability Ins/ SSDI	If the client receives SSDI, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Social Security Retirement	If the client receives Social Security retirement, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Gen Assist/Gen Relief GA/GR	If the client receives Gen Assist/Gen Relief, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Unemployment/UI	If the client receives Unemployment, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Public Assistance	Use the Yes/No dropdown to indicate whether the client receives any sort of public assistance. Public assistance is defined as financial help from government sponsored programs that provide for disadvantaged groups. This can include food stamps, Social Security assistance, and other welfare programs.
State Disability Ins/SDI	If the client receives SDI, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Long-term Disability/LTD	If the client receives LTD, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Worker's Compensation	If the client receives Workers Comp, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
TANF CalWORKS	If the client receives TANF CalWORKS, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Veterans Benefits/VA	If the client receives VA, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Alimony/Child Support	If the client receives alimony/child support, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Other 1, 2, 3 fields	For sources of income not listed elsewhere, use the "other" text fields to indicate the source. In the accompanying text fields to the right of the "Other" fields, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.

Retirement	If the client receives any type of retirement income, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Investment	If the client receives any type of investment income, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Gift	If the client receives income from a gift, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
Food Stamps	If the client receives food stamps, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.
No source of income checkbox	If the client has no source of income, check this box. Note: If the client does have a source of income, you cannot enter it on the screen without first <i>unchecking</i> this box.
Total	ARIES automatically calculates the total of the client's income from the Client Income section.

Household Income Section

Monthly Household Income	Enter the combined income of all individuals in the client's household over the age of 15 (including the client), related or not. Use the format as in the following example: 1,500.00. No dollar sign.
# People in Household	Enter the total number of persons in the household, including relatives and children. Note: You must enter a value between 1 and 20 in this field.
# Children in Household	Enter the total number of children in the household.
Percent Federal Poverty Level	This percentage will be automatically calculated when you save the form. It cannot be edited.
# HIV+ People in Household	Enter the number of HIV+ people in the household, including the client.

Family Income Section

Family Income	Enter the combined income of all family members in the client's household over the age of 15 (including the client). Use the format as in the following example: 1,500.00. No dollar sign.
# People in Family	Enter the total number of persons in the family, including children.
Percent Federal Poverty Level	This percentage will be automatically calculated when you save the form. It cannot be edited.

Assets

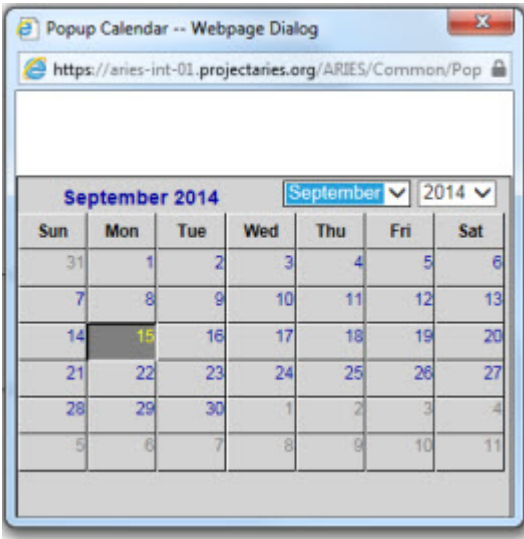
Do you own: a house?	Use the Yes/No dropdown to indicate whether the client owns a house.
Do you own: a car?	Use the Yes/No dropdown to indicate whether the client owns a car.
Other Assets	Use the Yes/No dropdown to indicate whether the client has other assets. Assets can include savings, bonds, or other investments.
Dollar Amount of Other Assets	If the client has other assets, enter the dollar amount. Use the format as in the following example: 1,500.00. No dollar sign.

Income History

\$\$\$ INCOME HISTORY				
Date	Monthly Client Income	Monthly Household Income	Monthly Family Income	
1/1/2010	\$1,600.00	\$1,600.00	\$1,600.00	<input type="button" value="Edit"/>
7/1/2009	\$1,650.00	\$1,650.00	\$1,650.00	<input type="button" value="Edit"/>
1/1/2009	\$1,500.00	\$1,500.00	\$1,500.00	<input type="button" value="Edit"/>
7/1/2008	\$1,600.00	\$1,600.00	\$1,600.00	<input type="button" value="Edit"/>
<input type="button" value="New"/>				
<input type="button" value="Save + Next"/> <input type="button" value="Save + Done"/> <input type="button" value="Cancel"/>				




- To populate the income history fields with the revised income you have just entered in the sections above, click the **New** button. ARIES will automatically calculate the income history.
 - To edit a row in the Income History, click on the **Edit** button for that row.
 - To enter a new row of Income History, click the **New** button.
- Either action makes a row editable on the Financial Edit screen.

\$\$\$ INCOME HISTORY				
Date	Monthly Client Income	Monthly Household Income	Monthly Family Income	
1/4/2010 <input type="button" value="Calendar"/>	<input type="text" value="2000.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Deactivate"/>

Date	<p>Enter the date of the income history. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.]</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
Monthly Client Income	<p>Enter the monthly dollar amount of wages the client derives from employment. Use the format as in the following example: 1,500.00. No dollar sign.</p>




Monthly Household Income	Enter the combined monthly income of every individual in the client's household over the age of 15 (including the client), related or not. Use the format as in the following example: 1,500.00. No dollar sign.
Monthly Family Income	Enter the combined monthly income of every family member in the client's household over the age of 15 (including the client). Use the format as in the following example: 1,500.00. No dollar sign.

After completing your entries:

	Click Save to store the history update and return to the Financial edit screen.
	Click Cancel to discard the history and return to the Financial Edit screen.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is available only to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate a financial row. You are prompted to confirm the deactivation. Once deactivated, the row will no longer appear on the Financial Edit screen.</p> <p>Clicking the Deactivate button does not deactivate the client with ARIES; it only deactivates the row.</p>

Note: Be sure to click the **New** button each time the Income History financial information is edited, to save the new information for historical purposes.

After editing the financial information or adding new financial information:

	Click this button to save your input and proceed to the Insurance Edit screen.
	Click this button to save your input and return to the read-only Financial screen.
	Click this button to discard your input and return to the read-only Financial screen.

2.6.5 Insurance

The Insurance screen lists the client's health insurance information.

To access this screen select the Eligibility tab from the top row of tabs, then click the Insurance tab from the second row of tabs.

Hiram S ATestool ⚠️

Insurance New

Start Date	Source	Payer	Pending	Prim Ins	Carrier	Premium	Note
End Date	Type	Entered By		Prim HIV	Policy #		
8/1/2012	Private 1	Ryan White	No	Yes	Blue Cross		
8/31/2015	No Insurance	Shasta Test Services		No			Edit

Insurance Verifications

Verified Date	Verified By	Agency	Due Date
	Jojo Jones	Shasta Test Services	9/1/2016

The insurance table contains the following information:

Start Date	The effective start date of the insurance policy.
End Date	The effective end date of the insurance policy.
Source	The insurance source, e.g., public, private, ADAP, Medicare, Medical/Medicaid.
Type	The type of medical insurance, e.g., restricted, COBRA, managed, Medicare A or B.
Payer	The name of the insurance payer (e.g., Client, Employer, Ryan White).
Entered by	Name of the agency, based on CreateAgency ID.
Pending	Indicates if the insurance is pending and not yet in effect.
Prim Ins	Indicates whether this insurance policy is used for the client's primary healthcare.
Prim HIV	Indicates whether this insurance policy is used for the client's primary HIV healthcare.
Carrier	The client's insurance carrier, e.g., Kaiser, Aetna, Blue Cross.
Policy #	The client's insurance policy number.
Start / End	The effective dates of the insurance policy.
Premium	The client's monthly insurance premium costs.
Note	Any additional notes regarding the insurance policy.

If you have the proper permissions to change or add any insurance information, click the **Edit** button to go to the [Insurance Edit](#) screen.

Insurance Verifications


The Insurance Verifications grid displays client task list information related to verifying the client's insurance. This may happen, for example, as part of a recertification or attestation process. The table tells which agency generated the task ('Agency'), the Staff who is assigned the Task ('Verified By'), the Task Outcome Date ('Verified Date') and the date that the Task is due ('Due Date').

The table sorts in reverse date order so that incomplete verifications appear at the top.

Selecting the **Verify** button brings up a popup window with Outcome which defaults to 'Complete,' Outcome Date which defaults to today's date, Save which saves the record and Cancel which returns the user to the read-only page without saving anything.

Insurance Verification for Hynam S ATestool

Outcome ▼

Outcome Date 

2.6.6 Insurance Edit


Notes

- When you enter a new client, a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.
- The [Ryan White HIV/AIDS Services Summary Report \(RSR\)](#) and [Statistical Analysis Report \(STAR\)](#) display results only for clients for whom insurance start dates are recorded in ARIES.

Use the Insurance Edit screen to edit a client's existing health insurance information, or to enter new health insurance information.

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

ELIGIBILITY DOCUMENTS FINANCIAL INSURANCE
INSURANCE ARIES

Hiram S ATestool 

Insurance New

Start Date	Source	Payer	Pending	Prim Ins	Carrier	Premium	Note
End Date	Type	Entered By		Prim HIV	Policy #		
8/1/2012	Private 1	Ryan White	No	Yes	Blue Cross		
8/31/2015	No Insurance	Shasta Test Services		No			Edit

Insurance Verifications

Verified Date	Verified By	Agency	Due Date
	Jojo Jones	Shasta Test Services	9/1/2016



Verify

Note: Client insurance information is longitudinal data and is intended to capture the client's insurance history. If a client's insurance is renewed, you need to make a new entry; do not simply update the start and end dates for an existing entry.

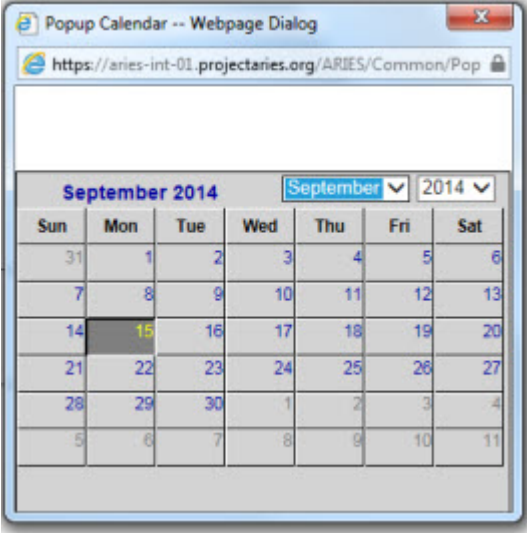
Example: A client has Medicare insurance with a start date of 7/10/2011 which expires 7/09/2012. If the insurance coverage is renewed on 7/10/2011 for another year, you need to make a new entry for Medicare insurance with a start date of 7/10/2011 and an end date of 7/09/2012.



To enter a new row of Insurance, click the **New** button. To edit an existing row of Insurance, click the **Edit** button.


Adam A Alias Insurance

Start Date * 7/1/2014  *
End Date * 6/30/2015  *
Source * Tricare
Type CHIPPS
Payer * Employer
Pending
Primary Insurance
Primary HIV Insurance
Carrier Other
 if other: AETNA INC
Policy # P444444
Premium 100.00
Notes
Save Cancel Deactivate

Complete the fields as follows:

<p>Start Date</p>	<p>Enter the start date of the client's medical coverage under this policy. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p> <p>Notes on Future Date</p> <ul style="list-style-type: none">• Some ARIES installations allow users to enter a future start date of up to 90 days beyond the date of entry. To determine whether your installation allows future dating, check with your system administrator.• If you enter a future date exceeding the limit for your installation, the associated dropdown fields on the Service Edit screen will display a message reading "Enter a valid Start Date that is between 1/1/1980 and [maximum future date]."
<p>End Date</p>	<p>Enter the end date of the client's insurance policy. Example: If the client is receiving COBRA benefits, you enter the last day of coverage. If the client's coverage is ongoing, leave the text field empty.</p> <p>Note: When you are adding or editing an insurance record and the end date is bank, you will receive a message reading: "Does this new coverage replace any old coverage? If so, enter an End Date for the coverage(s) that have ended." End Date is not required, but the message serves as a reminder to enter a date if the new coverage does in fact replace an old coverage.</p> <p>Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>
<p>Source</p>	<p>Use the dropdown to select the source of insurance.</p>




	<p>If the client has health insurance from a source not listed, select "Other."</p> <p>Note: Type and Payer selections must be valid values per Insurance Source validation rules. An error message will appear when invalid relationships to Source and Type are selected and attempted to save. Data will need to be corrected first before user can save the insurance record.</p>
Type	<p>Use the dropdown to select the type of medical insurance plan, e.g., restricted, COBRA, managed, Medicare A or B, etc.</p> <p>If the client has an insurance type not listed, select "Other."</p> <p>Note: Choose appropriate value from the Type dropdown which complies with your Source selection. See Insurance Data Validation Matrix below.</p>
Payer	<p>Use the dropdown to select the name of the insurance payer (e.g., Client, Employer, Ryan White).</p> <p>Note: Choose appropriate value from the Payer dropdown which complies with your Source > Type selections.</p>
Pending	<p>Check this box if the client has applied for this insurance policy, but is not yet eligible for benefits. If a policy is pending, you must enter the date it becomes effective in the Note field.</p>
Primary Insurance	<p>Check this box if this insurance policy is used for the client's primary healthcare.</p>
Primary HIV Insurance	<p>Check this box if this insurance policy is used for the client's primary HIV healthcare.</p>
Carrier	<p>Use the dropdown to select the policy's insurance carrier, e.g., Kaiser, Aetna, or Blue Cross.</p> <p>If the insurance carrier is not listed, select "Other" and enter the name of the insurance carrier in the Note field.</p>
Policy #	<p>Enter the client's insurance policy number.</p>
Premium	<p>Enter the client's monthly insurance premium costs.</p>
Notes	<p>Enter any additional notes regarding the insurance policy in the Note field. Example: If the client's insurance carrier isn't listed, enter the carrier's name here. Also, if a policy is pending, enter the date it becomes effective here.</p>
	<p>Click the Save button to save your input and return to the Insurance Edit screen.</p>
	<p>Click the Cancel button to return to the Insurance Edit screen without saving your entries.</p>

	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate the insurance row. Once deactivated, the row will no longer appear on the Insurance screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the insurance row.</p>
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Insurance Data Validation Matrix

Insurance Source	Insurance Type	Insurance Payer
Private 1, Private 2, Private 3, Covered CA/ACA		Employer
Private 1, Private 2, Private 3, Covered CA/ACA		Client
Private 1, Private 2, Private 3, Covered CA/ACA		Ryan White
Medicare	(do not select No Insurance or Unknown)	N/A
Medi-Cal/Medicaid, SCHIP, Other Public Insurance, Public 1, Public 2	(do not select No Insurance or Unknown)	N/A
Veteran, Tricare, Other Military	Veteran	Other Public
Indian Health Services		N/A
No insurance		N/A
Dental	(do not select No Insurance or Unknown)	
Vision	(do not select No Insurance or Unknown)	
All Others EXCEPT Unknown		N/A
Unknown		N/A

After completing all the fields on the screen, click on one of the following:

	Click this button to save your input and proceed to the Basic Medical Edit screen.
	Click this button to save your entries and return to the read-only Insurance screen.
	Click Cancel to return to the Insurance screen without saving your entries.

2.7 Programs

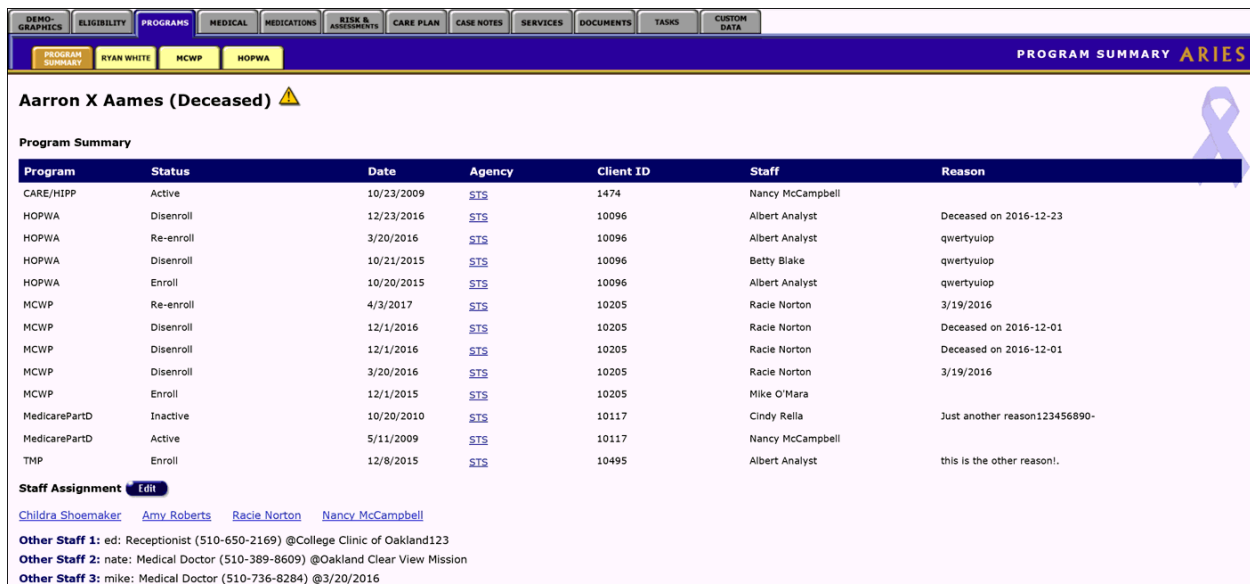
For some regions and agencies, services are available through specialized programs. These programs are set up for persons with specific needs who meet certain eligibility requirements. For example, Medi-Cal Waiver Program (MCWP) provides home- and community-based services for persons with AIDS and symptomatic HIV infection whose cognitive and functional abilities are impaired.

Each program has a separate enrollment process. Accuracy is critical in the enrollment process, as clients cannot receive benefits unless enrollment process is complete.

To access the Programs screen, click the Programs tab from the top tier of tabs. The first screen that displays is the [Program Summary](#) screen.

2.7.1 Program Summary

The Program Summary screen displays a table of the programs the client is enrolled in:



Aarron X Ames (Deceased) ⚠️

Program Summary

Program	Status	Date	Agency	Client ID	Staff	Reason
CARE/HIPP	Active	10/23/2009	STS	1474	Nancy McCampbell	
HOPWA	Disenroll	12/23/2016	STS	10096	Albert Analyst	Deceased on 2016-12-23
HOPWA	Re-enroll	3/20/2016	STS	10096	Albert Analyst	qwertyulop
HOPWA	Disenroll	10/21/2015	STS	10096	Betty Blake	qwertyulop
HOPWA	Enroll	10/20/2015	STS	10096	Albert Analyst	qwertyulop
MCWP	Re-enroll	4/3/2017	STS	10205	Racie Norton	3/19/2016
MCWP	Disenroll	12/1/2016	STS	10205	Racie Norton	Deceased on 2016-12-01
MCWP	Disenroll	12/1/2016	STS	10205	Racie Norton	Deceased on 2016-12-01
MCWP	Disenroll	3/20/2016	STS	10205	Racie Norton	3/19/2016
MCWP	Enroll	12/1/2015	STS	10205	Mike O'Mara	
MedicarePartD	Inactive	10/20/2010	STS	10117	Cindy Rella	Just another reason123456890-
MedicarePartD	Active	5/11/2009	STS	10117	Nancy McCampbell	
TMP	Enroll	12/8/2015	STS	10495	Albert Analyst	this is the other reason.

Staff Assignment [Edit](#)

[Childra Shoemaker](#) [Amy Roberts](#) [Racie Norton](#) [Nancy McCampbell](#)

Other Staff 1: ed: Receptionist (510-650-2169) @College Clinic of Oakland123
Other Staff 2: nate: Medical Doctor (510-389-8609) @Oakland Clear View Mission
Other Staff 3: mike: Medical Doctor (510-736-8284) @3/20/2016

This screen lists the program name, the status of the client within the program (if the client is active or disenrolled), the date the program information was entered, the agency the client is enrolled at, the client ID, the staff person assigned for that program, and the reason for their disenrollment (if any).

Please note that although there is no longer a CARE/HIPP, TMP or Medicare Part D program in which to enroll clients, previous enrollment data is still available and will appear in the Program Summary table.

The Agency column displays the short name of the agency as a link. Click this link to quickly access information about the agency, such as contact info or to find staff at the agency.

To access information regarding a specific program, use the second tier of tabs to select the program you want to view.

Clients can be assigned to specific staff persons. This person can be a case manager, a clinician, or even individuals outside of your agency. The staff person should be the person who has regular contact with the client; this should be done so that others who might need information about that client can access it easily by looking up the client's staff assignment.

If you have the proper permissions to change or enter a client's staff assignments, click the **Edit** button in the Program Summary screen to access the [Staff Assignment Edit](#) screen.

2.7.2 Staff Assignment

Clients can be assigned to specific staff persons. This person can be a case manager, a clinician, or even individuals outside of your agency. The staff person should be the person who has regular contact with the client; this should be done so that others who might need information about that client can access it easily by looking up the client's staff assignment.

For example, a staff person can look up a client's staff assignments to see who their therapist is; or, if an agency administrator has a question about a client's care plan, they can quickly look up the client's case manager and ask that case manager about the client's care plan.

Every ARIES client can have multiple Staff Assignments. With proper permissions to change or enter a client's staff assignments, click the **Edit** button in the Program Summary screen to access the [Staff Assignment Edit](#) screen.

After a client is disenrolled, discharged or deceased and the client's Agency Status has been updated to reflect the change, some agencies may also wish to remove active staff from the Staff Assignment 1 information that is documented on the Program Summary tab of the client record. This would simply remove the client from any searches for clients by staff provider and the staff name would no longer appear in the Agency Contact column of the client search results. Similarly, reports that capture Staff Assignment 1 data (e.g. caseload, client : provider ratio, and productivity reports) would no longer capture these clients due to staff assignment 1 being removed from the Program Summary tab.

It is important to note, removing staff assignment from the Program Summary tab for a non-active client will not impact or modify existing (or new) service delivery data, case notes, assessments, etc. provided or documented by the staff member in the client record.

All staff assignments (1 – 4) are removable for end users whose ARIES permissions allow viewing and changing the staff assignments located on the Program Summary tab.

2.7.3 Staff Assignment Edit

Note: When you enter a new client, a red message appears next to the client's name on the screen. This message reads, "Check the client's CDC Disease Status." ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.

You may use the Staff Assignment Edit screen to enter up to 4 agency staff persons to a client. For example, you could use Staff 1 to represent the client's Case Manager, Staff 2 to represent the client's Primary Physician, etc...In addition, you can manually enter the names of the three non-ARIES staff persons.



Staff for John A Porter

Staff 1
Staff 2
Staff 3
Staff 4

	Name	Title	Phone	Agency
Other Staff 1	<input type="text" value="George B. Sha"/>	<input type="text" value="Dentist"/>	<input type="text" value="323-555-1212"/>	<input type="text" value="Private"/>
Other Staff 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Staff 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Complete the fields as follows:

Staff 1	Use the dropdown to select a staff person for the client. Example: You might list a client's case manager as the Staff 1 assignment.
Staff 2, 3, 4	If appropriate, use the dropdowns for Staff 2, 3, and 4 to select additional staff persons. Example: You might list a client's primary physician as their Staff 2 assignment.
Other Staff 1, 2, 3	If you want to enter staff assignments from outside your agency, enter them in the Other Staff text fields. Example: You might list a client's dentist who works in conjunction with your agency.
Name	For each staff assignment entered in an "Other Staff" text field, enter the name of the staff person.
Title	For each staff assignment entered in an "Other Staff" text field, enter the staff person's title.
Phone	For each staff assignment entered in an "Other Staff" text field, enter the phone number of the staff person. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345
Agency	For each staff assignment entered in an "Other Staff" text field, enter the name of the agency where the staff person is located.

	Click the Save button to save your entries and return to the Program Summary screen.
	Click the Cancel button to return to the Program Summary screen without saving your entries.

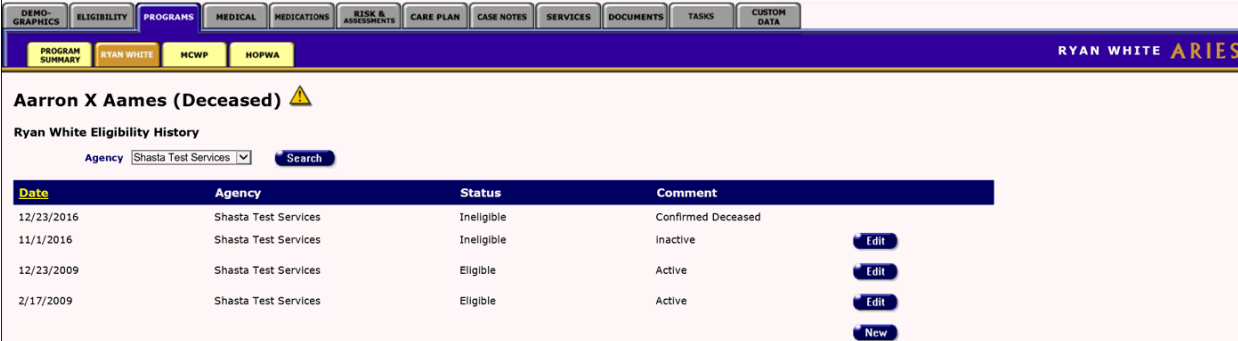
Please note that the [Active Client Roster by Staff](#) is based on the staff assignments for each client and is designed to identify a staff person's active case load.

2.7.4 Ryan White

The 2015 Ryan White Services Report (RSR) introduces the concept of Eligible Scope which expands the RSR to include eligible services received by eligible clients. Eligible services are easy to identify: if you received Ryan White funding for a service category, all services provided under that service category are eligible regardless of the actual funding source of the service. ARIES automatically identifies eligible services for the RSR. Eligible clients, on the other hand, are more difficult to identify. The Ryan White program sub-tab allows you track a client's Ryan White eligibility.

When a new client is enrolled at an agency, a new Ryan White Eligibility History record is created automatically with the same date as the Enroll Date (by default, today's date), a Status of "Eligible", and a Comment of "New Enrollment". If you back date the enrollment date on the Agency Specifics page, the Ryan White history record will automatically be updated to reflect the new enrollment date. The only thing that may be edited on this record is the Status value of Eligible or Ineligible.

Please note that when a client's Agency Specifics status is changed, a new record is automatically created on the Ryan White tab.



Date	Agency	Status	Comment
12/23/2016	Shasta Test Services	Ineligible	Confirmed Deceased
11/1/2016	Shasta Test Services	Ineligible	Inactive
12/23/2009	Shasta Test Services	Eligible	Active
2/17/2009	Shasta Test Services	Eligible	Active

The Agency filter allows you to see either all records, or only records from one agency. By default, the Agency filter will match the agency context. In other words, if you are a user at Agency A (or a user emulating Agency A) and you come to this screen, you will see only the records from Agency A with the most recent record at the top. If you wish to see records from other agencies (for share clients), you can change the agency filter.


The table contains the following fields:

Date	The as-of date for the status
Agency	The agency context in which the record was created

Status	The client's eligibility status, either Eligible or Ineligible. A client's Ryan White status is Eligible when their Agency Specifics status is Active. For all other Agency Specifics status values, the Ryan White status is Ineligible.
Comment	A text field where the user can enter a comment

If a client becomes ineligible for Ryan White services, you may select 'Edit' and change the Status from Eligible to Ineligible. If the client later becomes once again eligible for Ryan White services, simply select the 'New' button and enter the Date they become eligible, a status of Eligible and an optional comment of your choice. Select Save to return to the Ryan White tab or Cancel to cancel out of any changes.

Franklin D Aames Ryan White Eligibility History

Date 

Status

Comment

The comment field is optional and can contain any kind of comment. Some suggested comments are as follows:

- Recertification
- Disenrolled
- Lost to follow up
- No contact for 90 days
- Got a job

2.7.7 MCWP

Medi-Cal Waiver Program (MCWP) provides home- and community-based services for persons with AIDS and symptomatic HIV infection whose cognitive and functional abilities are impaired.

Aaron X Ames ⚠

MCWP

Program	Status	Date	Agency	Client ID	Staff	Reason
MCWP	Re-enroll	4/3/2017	STS	10205	Racie Norton	3/19/2016
MCWP	Disenroll	12/1/2016	STS	10205	Racie Norton	Deceased on 2016-12-01
MCWP	Disenroll	12/1/2016	STS	10205	Racie Norton	Deceased on 2016-12-01
MCWP	Disenroll	3/20/2016	STS	10205	Racie Norton	3/19/2016
MCWP	Enroll	12/1/2015	STS	10205	Mike O'Mara	

Service History

Assessment	Missed HAART	Ability to Take Meds	MCWP Level of Care
3/20/2016	Not sure/don't know	Not assessed	
1/20/2016	Yes	Unable to take medications unless administered by someone else	
2/1/2015	Yes	Not assessed	Acute

To access the MCWP screen, from a client's information screen, click the Program tab from the top tier of tabs. From the second tier of tabs, select the MCWP tab.

The screen is separated into two sections. The top portion shows the client's program status in a table. Listed are the client's status, the date of their last program update, the agency that enrolled them, their client ID, and the staff person assigned to them. Also included is the reason for disenrollment, if any.

To enroll a client, click the **Enroll** button, which takes you to the MCWP Enrollment screen. Before a client can be enrolled, their Medical information must first be complete, including their CDC Disease Stage and viral load.

Note: When you have enrolled a client, a [Change Status](#) button becomes visible on the read-only tab.

To change a client's enrollment status, click the **Change Status** button, which takes you to the [MCWP Enrollment Change Status](#) screen.

The second half of the screen displays a table of the client's assessments. MCWP clients are evaluated every 60 days on their HAART (highly active antiretroviral therapy) adherence. The first column lists the assessment dates; the second column indicates whether the client has not taken the HAART medications in the 48 hours before the assessment. The third column lists the client's ability to take their HAART medications. The fourth column shows the MCWP level of care, if indicated.

The MCWP Level of Care column lists the acuteness of the client's condition. This information is collected at enrollment.

To change an assessment, click the **Edit** button next to the entry. To enter a new assessment, click the **New** button. Either action takes you to the MCWP Edit screen.

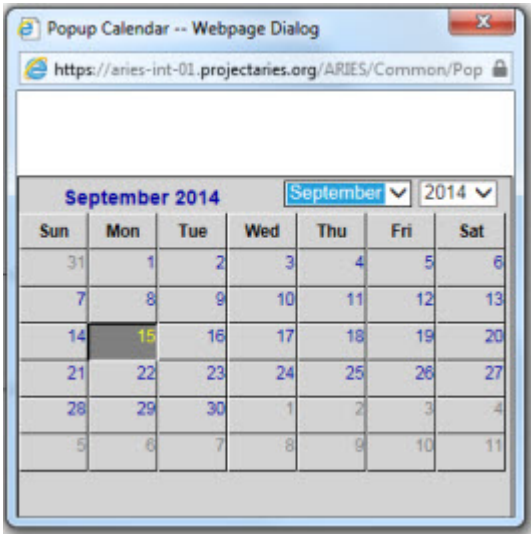

2.7.8 MCWP Enrollment


On this screen, you can enroll eligible clients in MCWP. However, you cannot enroll a client until you have finished entering the client's Medical information, including their CDC Disease Stage and viral load information.

Note: When you have enrolled a client, a [Change Status](#) button becomes visible on the read-only tab.

Joe I Hipster Program Enrollment

Program	Status	Date	Agency	Client Program ID
MCWP <input type="text"/>	Enroll	<input type="text"/>	Shasta Test Services	<input type="text"/> <input type="checkbox"/> Auto-generate Client ID
		Staff 1 <input type="text"/>		
		Staff 2 <input type="text"/>		
		Staff 3 <input type="text"/>		
		Staff 4 <input type="text"/>		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>				

Program	Select MCWP from the dropdown list.
Status	By default, the system supplies the Enroll status.
Date	<p>In the Date text field, enter the date of enrollment. Use the format MM/DD/YYYY. For example, for January 28, 2010 enter 1/28/2010. You can also use the pop-up calendar. Click the calendar icon to bring up the pop-up calendar.</p> <div style="text-align: center;">  </div> <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the text field. The calendar window automatically closes.</p>
Agency	The system supplies the name of the agency serving this client.
Client Program ID	If the program uses separate IDs from your agency, enter the Client Program ID.
Auto-generate Client ID	You can also select the Auto-generate check box and ARIES will create an ID to assign to the client.
Staff checkboxes	From the Staff dropdown lists, select the staff persons who are assigned to the client's MCWP services.
	Click this button to save your entries and return to the read-only MCWP tab, where your new entries will be displayed.

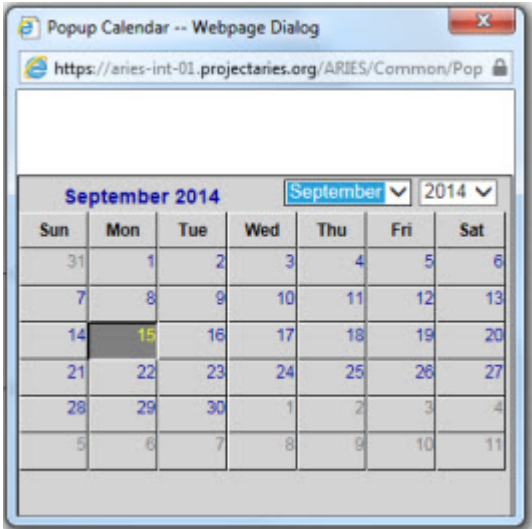
	Click this button to discard your entries and return to the read-only MCWP tab.
---	---




2.7.8.1 MCWP Enrollment Status Change

A client's enrollment status in MCWP can change based on their health status or any variety of reasons. When you change a client's program status, a new entry will display at the bottom of a table of the programs the client is enrolled in.

Joe I Hipster Program Enrollment

Program	Status	Date	Agency	Client Program ID
MCWP	Enroll	2/16/2016	STS	10219
Reason <input type="text"/> Other Reason <input type="text"/>				
Staff 1 <input type="text" value="Blake, Betty"/>				
Staff 2 <input type="text" value="Detestable, Dan"/>				
Staff 3 <input type="text"/>				
Staff 4 <input type="text"/>				
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Deactivate"/>				

Program	The system supplies the program name.
Status	From the dropdown, select "Disenroll" or "Re-enroll."
Date	<p>By default, the date of enrollment is displayed. Update this by typing the date of the status change in the text field. Use the format MM/DD/YYYY. For example, for January 28, 2010 enter 1/28/2010. You can also use the pop-up calendar. Click the calendar icon to bring up the pop-up calendar.</p> <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;">  </div> <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the text field. The calendar window automatically closes.</p>

Agency	Supplied by the system.
Client Program ID	Supplied by the system.
Reason	Required field. Select a reason for the status change from the dropdown. If "Other" is selected, you must complete the text field labeled "Other Reason."
Other Reason	If "Other" selected from the Reason dropdown list, you must complete this text field with the reason for status change.
Staff checkboxes	These fields display your selections on the Enrollment screen. You may update these selections here via the dropdowns.
	Click this button to save your entries and return to the read-only MCWP screen.
	Click this button to discard your entries and return to the read-only MCWP screen.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended. Click this button to deactivate and remove a status-change row from view.

2.7.9 MCWP Edit


Clients enrolled in MCWP should be assessed every 60 days for their adherence to their HAART (highly active antiretroviral therapy) medications.

If the client has not previously been assessed, the read-only MCWP screen will display a **New** button in the Service History section. Click this button to enter assessment data on the MCWP edit screen.

- To update a previous assessment, click the **Edit** button in the Service History section.




MCWP for Adam A Alias

Collect the following once every 60 days

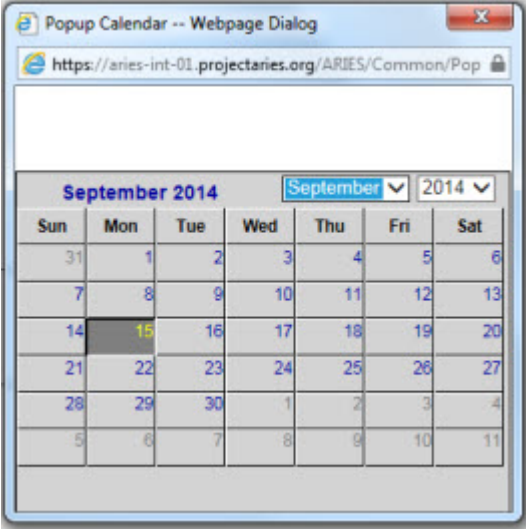



Assessment Date 

Client missed HAART doses within the previous 48 hours

Assessment of client's ability to take HAART medications

To record the assessment, complete the fields as follows.

<u>Collect the following once every 60 days</u>	
<p>Assessment Date</p>	<p>Enter the date of the assessment in the first text field. Use the format MM/DD/YYYY. You can also use the pop-up calendar. Click the calendar icon to bring up the pop-up calendar.</p>  <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the text field. The calendar window automatically closes.</p>
<p>Client missed HAART does within the previous 48 hours</p>	<p>Make the applicable selection from the dropdown list.</p>
<p>Assessment of client's ability to take HAART medications</p>	<p>Make the applicable selection from the dropdown list.</p>
	<p>Click this button to save your entries and return to the read-only MCWP tab, where your new entries will be displayed.</p>
	<p>Click this button to discard your entries and return to the read-only MCWP tab.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click this button to deactivate and remove the row from view.</p>

2.7.16 HOPWA

The Housing Opportunities for Persons With AIDS (HOPWA) screen summarizes enrollment and status change information if the client is receiving assistance from HOPWA. Use this screen to add or edit HOPWA-related information.

Note: Before a client can be enrolled in HOPWA via ARIES, a Housing and Income Assessment must be completed with an outcome of "Eligible." The **Enroll** button becomes visible only when the client has been found eligible for HOPWA services by means of a Housing and Income Assessment showing that the client meets low-income eligibility guidelines

To access the HOPWA screen from the Programs screen, click the HOPWA tab in the second row of tabs.

Aaron X Aames ⚠️

HOPWA

Program	Status	Date	Agency	Client ID	Staff	Reason
HOPWA	Disenroll	12/23/2016	STS	10096	Albert Analyst	Deceased on 2016-12-23 Change Status
HOPWA	Re-enroll	3/20/2016	STS	10096	Albert Analyst	qwertyuop
HOPWA	Disenroll	10/21/2015	STS	10096	Betty Blake	qwertyuop
HOPWA	Enroll	10/20/2015	STS	10096	Albert Analyst	qwertyuop

Housing and Income Assessment

Date	Staff	Applying for	Outcome
3/20/2016	Ca Windows	Facility Based Housing	Ineligible Edit
11/24/2014	Mike O'Mara	TBRA	Eligible Edit
3/7/2014	Mike O'Mara	TBRA	Eligible Edit

Household Status

Date	Staff	Program	Disenrolled
3/21/2016	Arlene Morlue		No Edit
3/20/2016	Ca Windows	Other HOPWA Services	Yes Edit
10/19/2015	outreachworker outreachworker	Permanent Housing Placement	Yes Edit



The read-only HOPWA screen is divided into three portions, each containing a summary of the information pertaining to the client:

- [HOPWA](#) program enrollment history
- [Housing and Income Assessment](#) summary
- Household Status summary.

2.7.16.1 HOPWA Program Enrollment History

The HOPWA section displays the enrollment records for a client enrolled in HOPWA. This information includes:

Program	"HOPWA" will appear in this column for any enrollment records once the client has been enrolled in HOPWA program.
Status	The current or any previous status changes that were processed for the client in the HOPWA program.



Date	The date any change in status has been processed for the client in the HOPWA program. These records are descending by date and will list the latest enrollment request that has been processed.
Agency	Indicates the agency where the status change was processed.
Client ID	Indicates the client ID number at the agency where the HOPWA status was processed.
Staff	Indicates the staff name that completed the HOPWA status change for the client.
Reason	If the client is no longer participating in HOPWA, the reason is shown.
 OR 	<p>The Enroll button appears when a Housing and Income Assessment has been completed for the client but the client has not been enrolled in HOPWA.</p> <p>The Change Status button is displayed for the most recent enrollment record when a client is currently enrolled in HOPWA. However, it is displayed only if the record was created at your agency.</p>

Note: The absence of enrollment records displayed in this section would indicate that the client has never been enrolled in HOPWA.

Click [here](#) for a description of the read-only Housing and Income Assessment section.

2.7.16.2 Housing and Income Assessment

The read-only Housing and Income Assessment section of the HOPWA screen displays the eligibility records for a client. This information includes:

Date	The date the assessment record was processed.
Staff	The name of the staff person who completed the HOPWA assessment record for the client.
Applying for	The type of housing assistance the client has applied for.
Outcome	<p>The outcome of an assessment.</p> <p>In order for a client to be enrolled in HOPWA, the most recent record for the client at your agency must indicate "Eligible" in the Outcome column.</p>
	Click this button to edit an existing assessment record.
	Click this button to create a new assessment record.

- There can be multiple records per client, and the records can be entered prior to enrollment in the HOPWA program. You may see records created at other agencies if you have the proper permissions, but you will not be able to edit the data in these records.
- You can only edit records that have been created at your agency, and then only if you have the proper permissions.
- An assessment record should only be edited if a correction is needed, or if the client has not yet been enrolled in HOPWA. An existing record is a snapshot of a particular date, and the information is used to justify why the client was originally enrolled in HOPWA.
- Once the client is enrolled in HOPWA, and a client's household changes or the income of any household member changes, a new Housing and Income Assessment record should be created.
- A client must be determined to be HIV positive before a Housing and Income Assessment can be completed. If the client record is missing this information when you try to create a new assessment, the system will display a message saying, "Client must be HIV+ or have AIDS."

[Click here to view help on the read-only Household Status section.](#)

2.7.16.3 Housing and Income Assessment Part 1

Anyone with HIV/AIDS and their family members, regardless of income, can receive HOPWA-funded Housing Information Services.

To be eligible for HOPWA Housing Assistance and Supportive Services:

- At least one family member must have HIV/AIDS.
- The household income must qualify.
- The HOPWA-eligible person can be a minor. However, an adult with custodial authority must accompany the eligible minor.

Prior to enrolling a client in HOPWA, a Housing and Income Assessment record must be completed to determine if the client is eligible for enrollment in HOPWA. The assessment record consists of three (3) different screens, all of which must be completed in order to save the new record.

To create a new Housing and Income Assessment record:

- Click the **New** button in the Housing and Income Assessment section on the HOPWA screen to display the HOPWA Housing and Income Assessment Part 1 screen.

Notes

- All data values (except Assessment Date) from an existing assessment will automatically copy to a new assessment. You may then edit the new assessment as needed.
- ARIES prevents sharing of restricted Living Situation data that reveal substance abuse or mental health issues.

HOPWA Income Assessment Part 1 for Annie W Eno

Assessment/Application Date

Is the applicant chronically homeless as defined by HUD?

Is the applicant a survivor of domestic violence?

Living situation at time of enrollment

If Other, Specify:

Application Type Individual Family **Applying for**

Do you have a roommate or live in a shared living situation?

Are you a home owner? **Are you a renter?**

If you rent or own, do you have a signed lease, title or tax receipt?

If yes, amount of mortgage or rent per month? **How long at this residence**

Name on mortgage

Terms of lease/rental agreement

Name on lease/rental agreement

Landlord / management co. / mortgage holder (payee)

Address

Address Line 2

City **State** **ZIP**



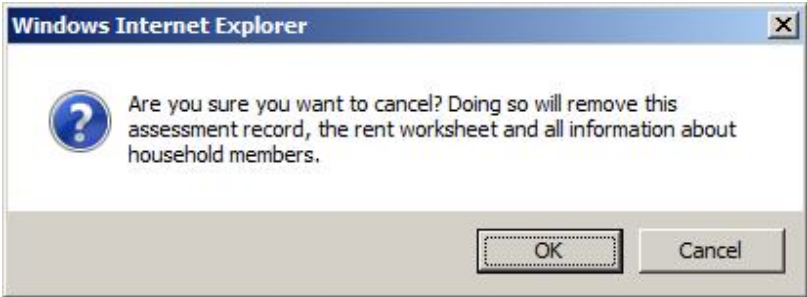

Phone **W-9 on file**

Note: For confidentiality purposes, not all family members are required to be entered as related/affected in ARIES.

Complete the fields as follows:

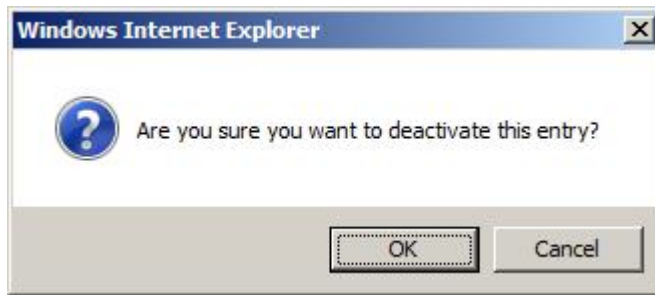
Assessment/Application Date	<p>Since you are creating a new record, ARIES will automatically pre-populate the Assessment/Application Date field with today's date.</p> <p>Note: When creating a new record, the Assessment/Application Date must be unique. There cannot be another record for the same client at the same agency with the same date.</p>
Staff	<p>ARIES will pre-populate the Staff field with the staff name of the current user who is creating the record.</p>
Is the applicant chronically homeless as defined by HUD?	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p><i>(Chronically homeless is defined as: "An unaccompanied homeless individual with a disabling condition who has either been continuously homeless for a year or more OR has had at least four episodes of homelessness in the past three years." For this purpose, the term "homeless" means "a person sleeping in a place not meant for human habitation (e.g., living on the streets) or in an emergency homeless shelter." This does not include doubled-up or overcrowding situations.)</i></p>
Is the applicant a survivor of domestic violence?	<p>Use the dropdown to select Yes, No, or Unknown.</p>

Living situation at time of enrollment	Use the dropdown to select the option that best describes the client's current living situation. If "Other (specify)," complete the next field.
If Other, specify	If you selected "Other (specify)" from the living situation dropdown, briefly describe the living situation.
Application Type radio buttons	Select either the Individual or Family radio button.
Applying for	Use the dropdown to select the type of HOPWA assistance the client is applying for. Note: If 'Housing Information' is selected from this dropdown list, then when users click Save + Next on this assessment page, the assessment is automatically saved with an income of 0 and an 'Eligible' assessment.
Do you have a roommate or live in a shared living situation?	Use the dropdown to select Yes, No, or Unknown.
Are you a homeowner?	Use the dropdown to select Yes, No, or Unknown.
Are you a renter?	Use the dropdown to select Yes, No, or Unknown. A client cannot be both a homeowner and renter.
If you rent or own, do you have a signed lease, title or tax receipt?	Use the dropdown to select Yes, No, or Unknown. If "Yes," complete the next field.
If yes, amount of mortgage or rent per month?	Enter the amount of mortgage or rent per month. Enter whole numbers for exact dollar amounts (e.g., for \$450.00, enter 450). ARIES will enter the decimal point and zeros for you when you save the record.
How long at this residence fields	If the client rents or owns, enter the number of years and months at this residence.
Name on mortgage	If the client has a mortgage, enter the name of the mortgage. If the client pays rent, leave this text box blank.
Terms of lease/rental agreement	If the client rents, enter any appropriate information provided by the client in regards to their lease or rental agreement.
Name on the lease/rental agreement	Enter the name on the lease or rental agreement for the client.

Landlord/management co./mortgage holder (payee)	Enter the name of the payee that the client pays their monthly rent or mortgage to.
Address	Enter the address of the payee.
City	Enter the city in which the payee is located.
State	Use the dropdown to select the state in which the payee is located.
Zip	Enter the payee's ZIP code.
Phone	Enter the phone number of the payee. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345
W-9 on file checkbox	If there is a W-9 form on file at your agency for the landlord or property management company, check this box.
	Click this button to save your input and proceed to the Housing and Income Assessment Part 2 screen.
	<p>Click Cancel to return to the HOPWA screen without saving your input.</p> <p>Note: You will be prompted to confirm the cancellation.</p>  <p>If you wish to confirm the cancellation, click OK. All the information you have entered for this assessment record will be deleted (this includes data that may have been entered in the Rent Worksheet). Once you click OK, you will be returned to the HOPWA screen.</p> <p>If you if you do not want to cancel your entries, click Cancel and you will be returned to the Housing and Income Assessment Part 1 screen.</p>
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.

Click the Deactivate button to deactivate the assessment record.

Note: You will be prompted to confirm the deactivation.



If you wish to confirm the deactivation, click **OK**. You will be returned to the HOPWA screen.

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.

If you do not want to deactivate the record, click **Cancel** and you will be returned to the Housing and Income Assessment Part 1 screen.

2.7.16.4 Housing and Income Assessment Part 2

HOPWA Assessment Part 2 for Annie W Eno

Do you currently receive housing rental assistance? Yes

If yes, what type? Other subsidy **Date first received** 6/18/2006

If no, willing to apply? **Reason not applying for rental assistance**

Current housing description

What utilities do you pay for in addition to rent?

Gas Hot Water
 Electric None
 Heating Fuel Other

Who pays the utilities in the household?

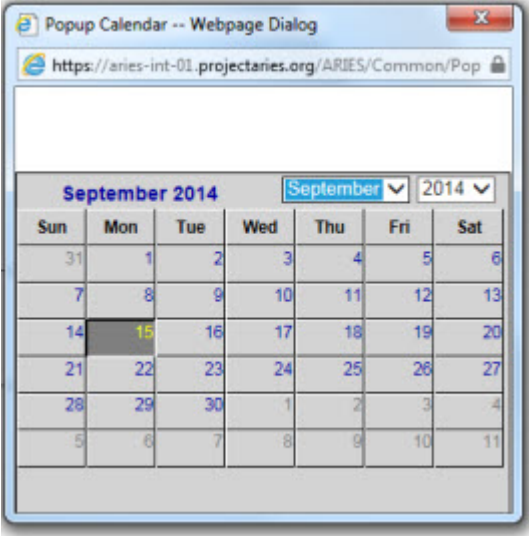
Applicant Roommate
 Spouse/Partner None
 Other

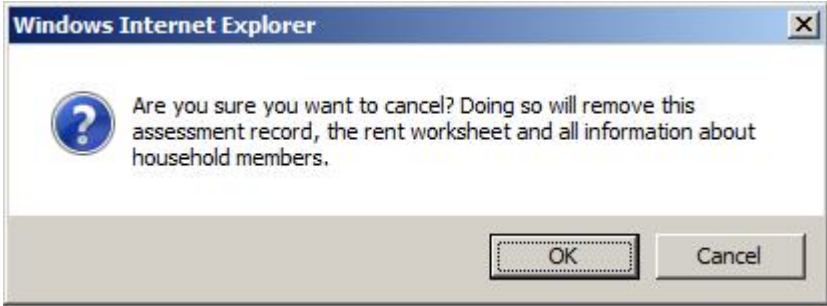
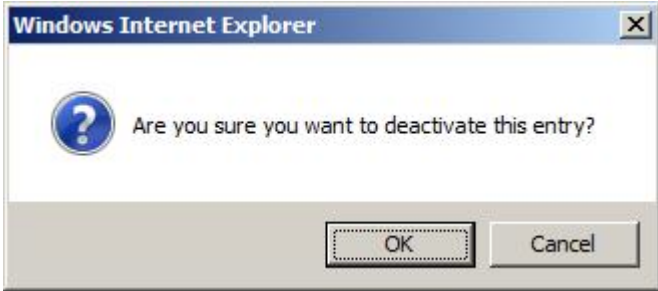
Employed Part-time

Public Assistance No

Complete the fields as follows:

Do you currently receive housing rental assistance?	Use the dropdown list to select Yes, No, or Unknown. If Yes, complete the next field.
--	---

If yes, what type?	If the client receives housing rental assistance, use the dropdown to select what type.
Date first received	<p>If the client receives housing rental assistance, enter the date the assistance was first received.</p> <p>Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
If no, willing to apply?	If the client does not receive housing rental assistance, use the dropdown to select Yes, No, or Unknown.
If not willing to apply, why?	If the client is not willing to accept housing rental assistance, enter a brief explanation in the text field.
Current housing description	Use the dropdown to select the number of bedrooms at the client's residence. If a client lives in a single-room occupancy hotel, select SRO.
What utilities do you pay for in addition to rent?	Check all boxes that apply. If you check "Other," enter a brief description in the text field.
Who pays the utilities in the household?	Check the box that applies. If you check "Other," enter a brief description in the text field.
Employed	Use the dropdown to select the option that best describes the client's employment status.
Public assistance	Use the dropdown to select Yes, No, or Unknown.

<p>Save + Next ▶</p>	<p>Click this button to save your input and proceed to the Housing and Income Assessment Part 3 screen.</p>
<p>Cancel</p>	<p>Click Cancel to return to the Housing and Income Assessment Part 1 screen without saving your input.</p> <p>Note: You will be prompted to confirm the cancellation.</p>  <p>If you wish to confirm the cancellation, click OK. All the information you have entered for this assessment record will be deleted (this includes data that may have been entered in the Rent Worksheet). Once you click OK, you will be returned to the Housing and Income Assessment Part 1 screen.</p> <p>If you if you do not want to cancel your entries, click Cancel and you will be returned to the Housing and Income Assessment Part 2 screen.</p>
<p>Deactivate</p>	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate the assessment record.</p> <p>Note: You will be prompted to confirm the deactivation.</p>  <p>If you wish to confirm the deactivation, click OK. You will be returned to the Housing and Income Assessment Part 1 screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.</p> <p>If you do not want to deactivate the record, click Cancel and you will be returned to the Housing and Income Assessment Part 2 screen.</p>

2.7.16.5 Housing and Income Assessment Part 3

HOPWA Assessment Part 3 for Annie W Eno

Household Members

Name	ARIES Client	Relationship	Monthly Income	Edit
Annie W Eno	Yes	Applicant	\$2,228.33	

Total Monthly Household Income \$2,228.33
Total Annual Household Income \$26,739.96
Household Size 1
Qualifying AMI Percentage for this Jurisdiction Low Income <=80% of AMI
Income Threshold for this AMI Percentage and Household Size [HUD Area Median Income Website](#)
AMI Range for this Applicant's Income
Outcome Eligible
Adjusted Annual Household Income \$0.00
Monthly Resident Rent Payment \$0.00
Monthly Resident Rent and Utility Payment \$0.00

Household on Waiting List:
 TBRA
STRMU
 Facility Based

STRMU Assistance Type
 Rental Costs
 Mortgage Payments
 Utility Costs

Notes

Save
Cancel
Deactivate

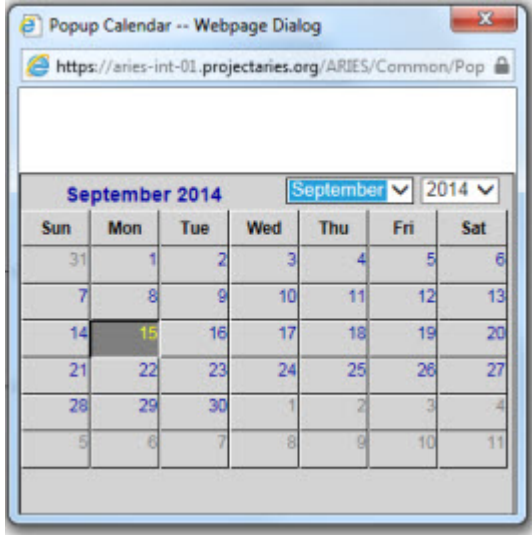
Household Members Section

The top row displays the applicant's household records based on the applicant's income and demographics information that was previously entered in ARIES.

Complete the fields as follows:

Total Monthly Household Income	This is a read-only field and is not editable. This calculation was provided from the information specified in the Household Members section.
Total Annual Household Income	This is a read-only field and is not editable. This calculation was provided from the information specified in the Household Members section.
Household Size	This is a read-only field and is not editable. This calculation was provided from the information specified in the Household Members section.
Qualifying AMI Percentage for this jurisdiction	The dropdown default is Low Income <=80% of the Area Median Income. If you change the default value to any other value, a warning message appears "Agencies may not use a qualifying percentage OTHER than 80% unless they have approval from their Grantee." If you have received written approval from your HOPWA grantee to impose a more restrictive income eligibility requirement

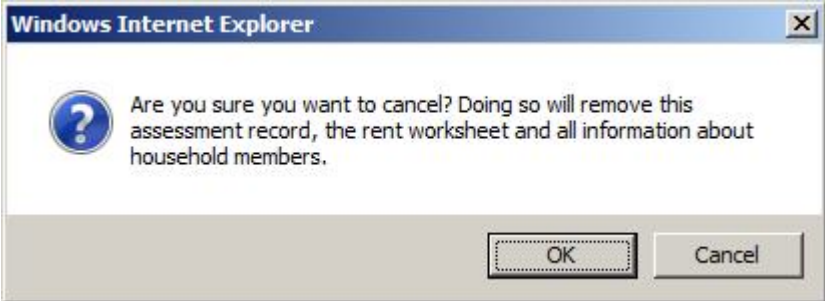
	<p>(such as =<50% of the Area Median Income), select the value from the dropdown.</p> <p>HUD regulations state that a household with an income at or below 80% of the area median income for its household size qualifies for HOPWA assistance. HOPWA grantees may impose a more restrictive income eligibility requirement to ensure that the households most in need are served.</p>
<p>Income Threshold for this AMI Percentage and Household Size</p>	<p>Click on the HUD Area Medium Income Website link displayed on the Housing and Income Assessment Part 3 screen.</p> <p>Note: If the HUD website link takes you to a page with a button labeled Click Here for FY [current year] IL Documentation, click on the button before continuing.</p> <p>On the website, locate the number of people in the household in the table provided. Enter the figure in the text field.</p> <p>If a new family member is added to the assessment, this field will need to be changed accordingly.</p>
<p>AMI Range for this applicant's income</p>	<p>The default value for the dropdown is blank. Check the HUD website and assess the Applicant's actual percentage of AMI. Then select the appropriate value from the dropdown (Extremely Low 0-30% of AMI; Very Low 31-50% of AMI; Low 51-80% of AMI; Ineligible >80% of AMI).</p> <p>If the assessment is Eligible, select one of the first three value options from the dropdown. If the assessment is Ineligible, select the last option in the dropdown.</p> <p>You are required to make an entry in this field. If you attempt to save without a value selected, a warning message will display.</p>
<p>Outcome</p>	<p>Once you have entered the information, ARIES will calculate the data and display either "Eligible" or "Ineligible" in the Outcome field.</p> <p>ARIES will also update this field whenever a household member is added or edited (including deactivation), or whenever the Income Threshold text box is changed.</p>
<p>Adjusted Annual Household Income</p>	<p>The client's household's monthly income reduced by deductions (or allowances) for dependents, elderly households, medical expenses, disability assistance expenses, and childcare. These deductions are entered into the Rent Worksheet and ARIES will perform the required calculations for you.</p> <p>Completing the Rent Worksheet is optional, depending on the type of assistance the client is applying for. You can either complete the Rent Worksheet now by clicking on the Rent Worksheet button, or complete it at a later time by editing the assessment record.</p>
<p>Monthly Resident Rent Payment</p>	<p>This deduction is entered into the Rent Worksheet and ARIES will perform the required calculations for you.</p> <p>Completing the Rent Worksheet is optional, depending on the type of assistance the client is applying for. You can either complete the</p>

	Rent Worksheet now by clicking on the Rent Worksheet button, or complete it at a later time by editing the assessment record.
Monthly Resident Rent and Utility Payment	<p>This deduction is entered into the Rent Worksheet and ARIES will perform the required calculations for you.</p> <p>Completing the Rent Worksheet is optional, depending on the type of assistance the client is applying for. You can either complete the Rent Worksheet now by clicking on the Rent Worksheet button, or at a later time by editing the assessment record.</p>
Household on Waiting List	<p>If the client is eligible for HOPWA but you are unable to provide services immediately, your agency may choose to place the client on a Waiting List.</p> <p>If this occurs, enter the date you placed the client on the Waiting List in the appropriate date field (i.e., TBRA, STRMU or Facility-based), depending on the type of assistance requested. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p> <p>Note: Once you enter a Waiting List date, you should <u>not</u> remove it when the client starts receiving services. The date is used to calculate how long a client waited for services.</p>
STRMU Assistance Type	As appropriate, check one or more of the boxes: Rental Costs, Mortgage Payments, Utility Costs.
Notes field	Enter any comments or information specific to this assessment in the scrollable text box.

To Add or Edit a Household Member

If you wish to add a new household member, or edit an existing one, from this screen, click the **New** button or **Edit** button as appropriate. Follow the instructions in the section titled "Household Members New" or "Household Members Edit."

After completing all the fields on the Housing and Income Assessment Part 3 screen, select one of the following:

<p>Save</p>	<p>If you are completely finished with the Housing and Income Assessment screens and do not wish to add any new members at this time, click this button to save your input and return to the HOPWA screen.</p> <p>Note: If you want to add a new household member once you have left the Housing and Income Assessment screens, you will need to go to Housing and Income Assessment Part 1, and do Save+Next through all three Housing and Income Assessment screens (Part 1, 2, and 3) in order to enter a new household member.</p>
<p>Cancel</p>	<p>Click Cancel to return to the HOPWA screen without saving your input.</p> <p>Note: You will be prompted to confirm the cancellation.</p>  <p>To confirm the cancellation, click OK. All the information you have entered for this assessment record will be deleted (this includes data that may have been entered in the Rent Worksheet). When you click OK, you will be returned to the HOPWA screen.</p> <p>If you do not want to cancel the record, click Cancel and you will be returned to the Housing and Income Assessment Part 3 screen.</p>
<p>Deactivate</p> <p><i>This button is only visible if you have the proper permissions.</i></p>	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is available only to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the assessment record.</p> <p>Note: You will be prompted to confirm the deactivation.</p>



To confirm the deactivation, click **OK**. You will be returned to the HOPWA screen.

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.

If you do **not** want to deactivate the record, click **Cancel** and you will be returned to the Housing and Income Assessment Part 3 screen.

2.7.16.6 HOPWA Household Edit

Click to view [Adding New Household Members](#)

Editing Household Members

To edit an existing Household member:

From the HOPWA Housing and Income Assessment Part 3 screen, click the **Edit** button in the row of the household member you wish to edit. This brings up the HOPWA Household Edit screen.

Note: When a new Housing and Income Assessment record is started, income information for the applicant and any Related/Affected clients linked to the applicant and living with the applicant is automatically added to the Household Members section.

Non-ARIES clients: When editing an existing household member record for the applicant that you have manually added to the Household Members section, all of the fields on the screen are editable (except for Total Monthly Income).

If you are editing an existing household member record for a non-ARIES client, perform the updates as needed to the Demographics section of the screen, and then continue to the financial section.

ARIES clients: When editing an existing household member record for the applicant or an ARIES client, all the demographic fields are disabled. This information can only be edited from the [Demographics](#) tab.

If you are editing an existing household member record for an ARIES client, complete the financial section after editing the demographics section.

HOPWA Household for Hal J 9000

Related/Affected Client

<p>Name <input type="text" value="Hal J 9000"/></p> <p>Relation to Applicant <input type="text" value="Other"/></p> <p>Other Relationship <input type="text" value="Applicant"/></p> <p>Date of Birth <input type="text" value="3/20/1978"/></p> <p>Gender <input type="text" value="Male"/></p>	<p>Hispanic <input type="text" value="Yes"/></p> <p>Race 1 <input type="text" value="Other"/></p> <p>Race 2 <input type="text" value=""/></p> <p>CDC Disease Stage <input type="text" value="CDC-Defined AIDS"/></p>
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Enter Monthly income from all sources:

<p>Employment/Wages (Earned Income) <input type="text" value="0.00"/></p> <p>Unemployment Insurance <input type="text" value="0.00"/></p> <p>Supplemental Security Income (SSI) <input type="text" value="0.00"/></p> <p>Social Security Disability Income (SSDI) <input type="text" value="0.00"/></p> <p>Veteran's Disability Payment <input type="text" value="0.00"/></p> <p>Private Long-Term Disability Insurance <input type="text" value="0.00"/></p> <p>Worker's Compensation <input type="text" value="0.00"/></p> <p>Temporary Assistance for Needy Families <input type="text" value="0.00"/></p>	<p>General Assistance / General Relief <input type="text" value="0.00"/></p> <p>Social Security Retirement Income <input type="text" value="0.00"/></p> <p>Veteran's Pension <input type="text" value="0.00"/></p> <p>Pension/Retirement Income <input type="text" value="0.00"/></p> <p>Child Support <input type="text" value="0.00"/></p> <p>Alimony/Spousal Support <input type="text" value="0.00"/></p> <p>All Other Sources of Income <input type="text" value="0.00"/></p> <p>Total Monthly Income <input type="text" value="0.00"/></p>
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No income or Financial Resources

To Complete the Financial Section

Complete the fields as follows:

Enter monthly income from all sources	Enter the monthly income in each appropriate field. Enter whole numbers for exact dollar amounts (e.g., for \$25.00, enter 25). ARIES will enter the decimal point and zeros for you when you save the record.
Total Monthly Income	This is a read-only field and is not editable. ARIES automatically updates the total monthly amount as you enter figures in the various income fields.
No Income or Financial Resources checkbox	Check this box if a household member does not receive any monthly income or financial resources. Once this box is checked, all text fields in the financial section become disabled.
	Click this button to save your entries and return to the Housing Income and Assessment Part 3 screen.
	Click Cancel to return to the Housing and Income Assessment Part 3 screen without saving your entries. Note: You will be prompted to confirm the cancellation.



To confirm the cancellation, click **OK**. All the information you have entered for this record will be deleted, including the Rent Worksheet. Once you click **OK**, you will be returned to the Housing and Income Assessment Part 3 screen.

If you do **not** want to cancel the record, click **Cancel** and you will be returned to the Household Edit screen.

Deactivate

This button is only visible if you have the proper permissions.

Note: The use of **Deactivate** has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.

Click the **Deactivate** button to deactivate a household member's record for anyone except the applicant.

Note: You will be prompted to confirm the deactivation.



To confirm the deactivation, click **OK**. The record will be deactivated, including the Rent Worksheet. You will be returned to the Housing and Income Assessment Part 3 screen.

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.

If you do **not** want to deactivate the record, click **Cancel** and you will be returned to the Household Edit screen.

Adding New Household Members

To include the income for any Related/Affected clients living in the household but not currently linked to the applicant, or to include the income for any household member who is not specified as a Related/Affected client, you will need to add this information manually.

To manually add a new household member:

- From the HOPWA Housing and Income Assessment Part 3 screen, click the **New** button, to bring up the HOPWA Household Edit screen. All of the fields in the demographic and financial sections are enabled.

HOPWA Household for John E Afranklin

Related/Affected Client

Name <input type="text"/>	Hispanic <input type="text"/>
Relation to Applicant <input type="text"/>	Race 1 <input type="text"/>
Other Relationship <input type="text"/>	Race 2 <input type="text"/>
Date of Birth <input type="text"/>	CDC Disease Stage <input type="text"/>
Gender <input type="text"/>	

Enter Monthly income from all sources:

Employment/Wages (Earned Income) <input type="text"/>	General Assistance / General Relief <input type="text"/>
Unemployment Insurance <input type="text"/>	Social Security Retirement Income <input type="text"/>
Supplemental Security Income (SSI) <input type="text"/>	Veteran's Pension <input type="text"/>
Social Security Disability Income (SSDI) <input type="text"/>	Pension/Retirement Income <input type="text"/>
Veteran's Disability Payment <input type="text"/>	Child Support <input type="text"/>
Private Long-Term Disability Insurance <input type="text"/>	Alimony/Spousal Support <input type="text"/>
Worker's Compensation <input type="text"/>	All Other Sources of Income <input type="text"/>
Temporary Assistance for Needy Families <input type="text"/>	Total Monthly Income <input type="text" value="0"/>

No income or Financial Resources

Note: If you selected "Individual" as the "Application Type" in Housing and Income Assessment Part 1 of this record, the **New** button does not appear, and only the applicant's name will be displayed.

For a Household Member Who Exists in ARIES

A HOPWA household must include all of the people who are living with the applicant. Some of the household members might already be receiving services from the agency, and will be enrolled in ARIES as a Related/Affected client linked to the applicant, but not specified as living with the applicant.

Complete the fields as follows:

Related/Affected Client checkbox	Check this box if you are creating a new record for household member who exists in ARIES. This enables the next dropdown list.
Name of Household Member	<p>Use the dropdown to select the name of the household member you wish to create a record for.</p> <p>Once you select a household member, ARIES will populate the fields in the demographic and financial sections with the data currently in the system. You will not be able to edit this data as the fields will be disabled.</p> <p>Complete any editable fields that are relevant to the household member in the financial section of the screen.</p> <p>Note: A Related/Affected client can only be added once as a household member for each assessment record.</p>
Name	Automatically populated by ARIES. Not editable.

Relation to Applicant	Automatically populated by ARIES. Not editable.
Other Relationship	Automatically populated by ARIES. Not editable.
Date of Birth	Automatically populated by ARIES. Not editable.
Gender	Automatically populated by ARIES. Not editable.
Hispanic	Automatically populated by ARIES. Not editable.
Race 1	Automatically populated by ARIES. Not editable.
Race 2	Automatically populated by ARIES. Not editable.
CDC Disease Stage	Automatically populated by ARIES from input on the Basic Medical Edit screen. Not editable on the Household Edit screen.
Enter monthly income from all sources	Enter the monthly income in each appropriate field. Enter whole numbers for exact dollar amounts (e.g., for \$25.00, enter 25). ARIES will enter the decimal point and zeros for you when you save the record.
Total Monthly Income	This is a read-only field and is not editable. ARIES automatically updates the total monthly amount as you enter figures in the various text fields.
No income or Financial Resources checkbox	Check this box if a household member does not receive any monthly income or financial resources. Once this box is checked, all text fields in the financial section become disabled.



Note: If any information has been entered incorrectly or left out, an error message will be displayed. Examples:

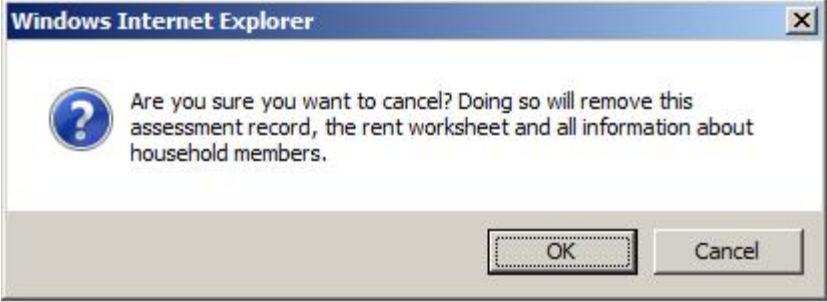
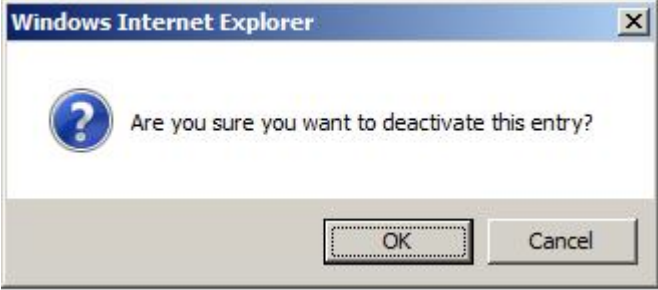
Total Monthly Income must be greater than 0 unless No Income is checked.

Income threshold must be between 0.01 and 999,999.99. Do not enter dollar sign (\$) in monetary fields. ARIES will do this for you.

Re-check your figures and make the necessary corrections.

After completing all the fields, select one of the following:

	Click this button to save your entries and return to the Housing and Income Assessment Part 3 screen.
	Click Cancel to return to the Housing and Income Assessment Part 3 screen without saving your entries. Note: You will be prompted to confirm the cancellation.

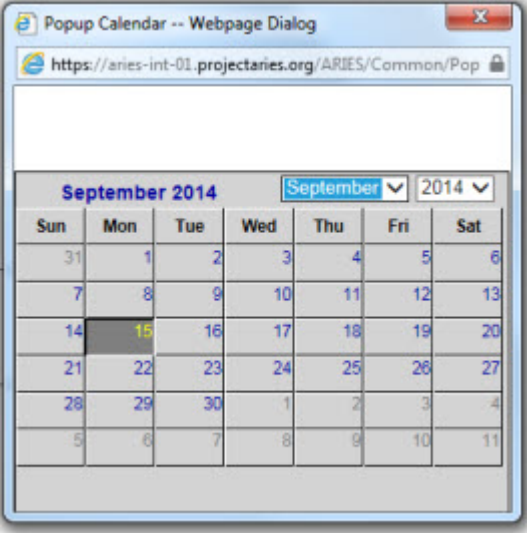
	 <p>To confirm the cancellation, click OK. All the information you have entered for this assessment record will be deleted, including the Rent Worksheet. Once you click OK, you will be returned to the Housing and Income Assessment Part 3 screen.</p> <p>If you do not want to cancel the record, click Cancel and you will be returned to the Household Edit screen.</p>
<p>Deactivate</p> <p><i>This button is only visible if you have the proper permissions.</i></p>	<p>Click the Deactivate button to deactivate a household member's record for anyone except the applicant.</p> <p>Note: You will be prompted to confirm the deactivation.</p>  <p>To confirm the deactivation, click OK. The record will be deactivated, including the Rent Worksheet. You will be returned to the Housing and Income Assessment Part 3 screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.</p> <p>If you do not want to deactivate the record, click Cancel and you will be returned to the Household Edit screen.</p>



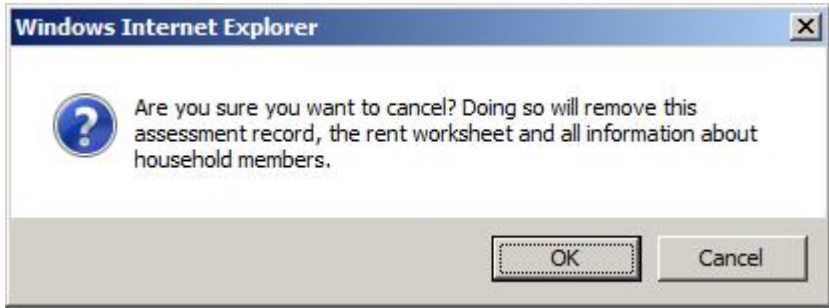

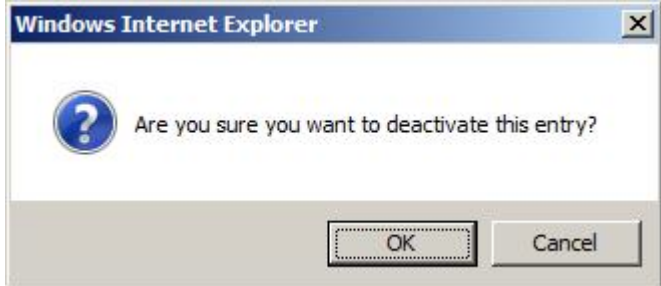
For a Household Member Who Does NOT Exist in ARIES

In many cases, there are members of the household who are not receiving any services from the agency, and therefore are not enrolled as Related/Affected clients (i.e., a non-ARIES client). For those household members that fit these descriptions, you must add them manually.

Complete the fields as follows:

<p>Related/Affected Client checkbox</p>	<p>Do NOT check this box if you are creating a new record for a household member who does not exist in ARIES.</p>
--	---

Name	Enter a name for the household member. <i>Do not enter the person's real name</i> as this would violate the confidentiality rule. Instead, enter a unique but anonymous description of the person, e.g., "Son #2," "Older Sister" or "Father-in-Law."
Relation to Applicant	Use the dropdown to select the household member's relationship to the applicant. If "Other" is selected, complete the next field.
Other Relationship	Briefly explain "Other" in this text box.
Date of Birth	<p>Enter the date when the household member was born. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
Gender	Use the dropdown to select the household member's gender.
Hispanic	Use the dropdown to select Yes, No, or Unknown.
Race 1	Use the dropdown to select the household member's primary ethnicity.
Race 2	Use the dropdown to select the household member's secondary ethnicity, if applicable. This is an optional field.
CDC Disease Stage	Use the dropdown to select the severity of the household member's HIV infection.
Enter monthly income from all sources	Enter the monthly income in each appropriate field.

	<p>Enter whole numbers for exact dollar amounts (e.g., for \$25.00, enter 25). ARIES will enter the decimal point and zeros for you when you save the record.</p>
<p>Total Monthly Income</p>	<p>This is a read-only field and is not editable. ARIES automatically updates the total monthly amount as you enter figures in the various text fields.</p>
<p>No Income or Financial Resources checkbox</p>	<p>Check this box if a household member does not receive any monthly income or financial resources.</p> <p>Once this box is checked, all text fields in the financial section become disabled.</p>
<p></p>	<p>Click this button to save your entries and return to the Housing and Income Assessment Part 3 screen.</p>
<p></p>	<p>Click Cancel to return to the Housing and Income Assessment Part 3 screen without saving your entries.</p> <p>Note: You will be prompted to confirm the cancellation.</p>  <p>To confirm the cancellation, click OK. All the information you have entered for this record will be deleted, including the Rent Worksheet. Once you click OK, you will be returned to the Housing and Income Assessment Part 3 screen.</p> <p>If you do not want to cancel the record, click Cancel and you will be returned to the Household Edit screen.</p>
<p></p> <p><i>This button is only visible if you have the proper permissions.</i></p>	<p>Click the Deactivate button to deactivate a household member's record for anyone except the applicant.</p> <p>Note: You will be prompted to confirm the deactivation.</p> 

To confirm the deactivation, click **OK**. The record will be deactivated, including the Rent Worksheet. You will be returned to the Housing and Income Assessment Part 3 screen.

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.

If you do **not** want to deactivate the record, click **Cancel** and you will be returned to the Household Edit screen.

2.7.16.7 Household Members

Click to view [Editing Household Members](#)

Adding New Household Members

To include the income for any Related/Affected clients living in the household but not currently linked to the applicant, or to include the income for any household member who is not specified as a Related/Affected client, you will need to add this information manually.

To manually add a new household member navigate to the HOPWA Housing and Income Assessment Part 3 screen and click the **New** button, to bring up the HOPWA Household Edit screen. All of the fields in the demographic and financial sections are enabled.

HOPWA Household for Burt B Robinson

Related/Affected Client

Name <input type="text"/>	Hispanic <input type="text"/>
Relation to Applicant <input type="text"/>	Race 1 <input type="text"/>
Other Relationship <input type="text"/>	Race 2 <input type="text"/>
Date of Birth <input type="text"/>	CDC Disease Stage <input type="text"/>
Gender <input type="text"/>	

Enter Monthly income from all sources:

Employment/Wages (Earned Income) <input type="text"/>	General Assistance / General Relief <input type="text"/>
Unemployment Insurance <input type="text"/>	Social Security Retirement Income <input type="text"/>
Supplemental Security Income (SSI) <input type="text"/>	Veteran's Pension <input type="text"/>
Social Security Disability Income (SSDI) <input type="text"/>	Pension/Retirement Income <input type="text"/>
Veteran's Disability Payment <input type="text"/>	Child Support <input type="text"/>
Private Long-Term Disability Insurance <input type="text"/>	Alimony/Spousal Support <input type="text"/>
Worker's Compensation <input type="text"/>	All Other Sources of Income <input type="text"/>
Temporary Assistance for Needy Families <input type="text"/>	Total Monthly Income <input type="text" value="0"/>

No income or Financial Resources

Note: If you selected "Individual" as the "Application Type" in Housing and Income Assessment Part 1 of this record, the **New** button does not appear, and only the applicant's name will be displayed.

For a Household Member Who Exists in ARIES

A HOPWA household must include all of the people who are living with the applicant. Some of the household members might already be receiving services from the agency, and will be enrolled in ARIES as a Related/Affected client linked to the applicant, but not specified as living with the applicant.

Complete the fields as follows:

Related/Affected Client checkbox	Check this box if you are creating a new record for household member who exists in ARIES. This enables the next dropdown list.
Name of Household Member	Use the dropdown to select the name of the household member you wish to create a record for. Once you select a household member, ARIES will populate the fields in the demographic and financial sections with the data currently in the system. You will not be able to edit this data as the fields will be disabled. Complete any editable fields that are relevant to the household member in the financial section of the screen. Note: A Related/Affected client can only be added once as a household member for each assessment record.
Name	Automatically populated by ARIES. Not editable.
Relation to Applicant	Automatically populated by ARIES. Not editable.
Other Relationship	Automatically populated by ARIES. Not editable.
Date of Birth	Automatically populated by ARIES. Not editable.
Gender	Automatically populated by ARIES. Not editable.
Hispanic	Automatically populated by ARIES. Not editable.
Race 1	Automatically populated by ARIES. Not editable.
Race 2	Automatically populated by ARIES. Not editable.
CDC Disease Stage	Automatically populated by ARIES. Not editable.
Enter monthly income from all sources	Enter the monthly income in each appropriate field. Enter whole numbers for exact dollar amounts (e.g., for \$25.00, enter 25). ARIES will enter the decimal point and zeros for you when you save the record.

Total Monthly Income	This is a read-only field and is not editable. ARIES automatically updates the total monthly amount as you enter figures in the various text fields.
No Income or Financial Resources checkbox	Check this box if a household member does not receive any monthly income or financial resources. Once this box is checked, all text fields in the financial section become disabled.



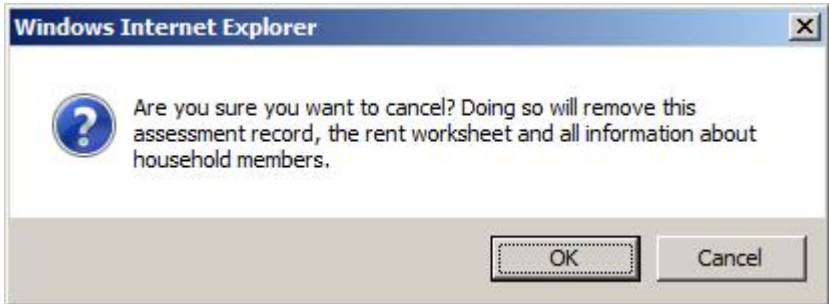

Note: If any information has been entered incorrectly or left out, a message will be displayed. Examples:

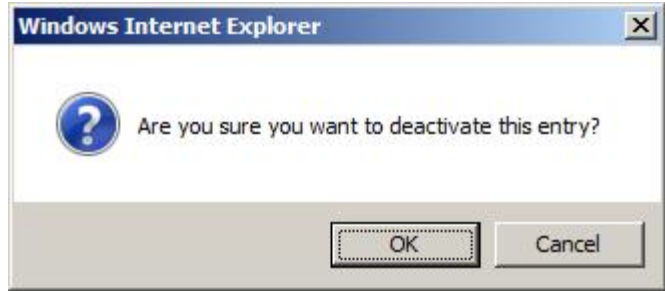
Total Monthly Income must be greater than 0 unless No Income is checked.

Income threshold must be between 0.01 and 999,999.99. Do not enter dollar sign (\$) in monetary fields. ARIES will do this for you.

Re-check your figures and make the necessary corrections.

After completing all the fields, select one of the following:

	Click this button to save your entries and return to the Housing and Income Assessment Part 3 screen.
	Click Cancel to return to the Housing and Income Assessment Part 3 screen without saving your entries. Note: You will be prompted to confirm the cancellation.  To confirm the cancellation, click OK . All the information you have entered for this assessment record will be deleted, including the Rent Worksheet. Once you click OK , you will be returned to the Housing and Income Assessment Part 3 screen. If you if you do not want to cancel the record, click Cancel and you will be returned to the Household Edit screen.
 <i>This button is only visible if you have the proper permissions.</i>	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended. Click the Deactivate button to deactivate a household member's record for anyone except the applicant. Note: You will be prompted to confirm the deactivation.



If you wish to confirm the deactivation, click **OK**. The record will be deactivated, including the Rent Worksheet. You will be returned to the Housing and Income Assessment Part 3 screen.

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.

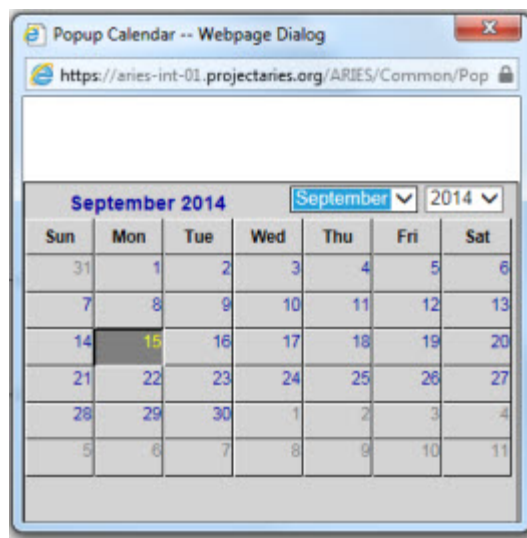
If you do **not** want to deactivate the record, click **Cancel** and you will be returned to the Household Edit screen.

For a Household Member Who Does NOT Exist in ARIES

In many cases, there are members of the household who are not receiving any services from the agency, and therefore are not enrolled as Related/Affected clients (i.e., a non-ARIES client). For those household members that fit these descriptions, you must add them manually.

Complete the fields as follows:

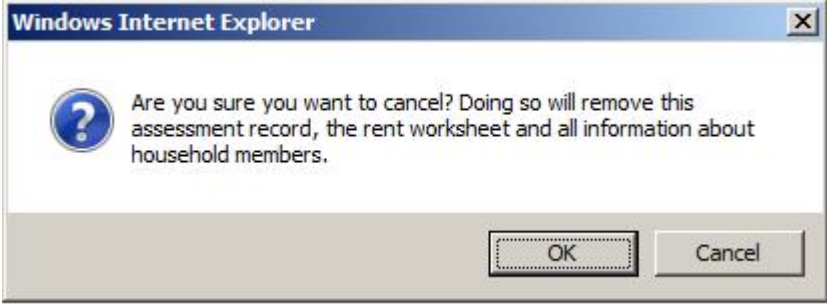
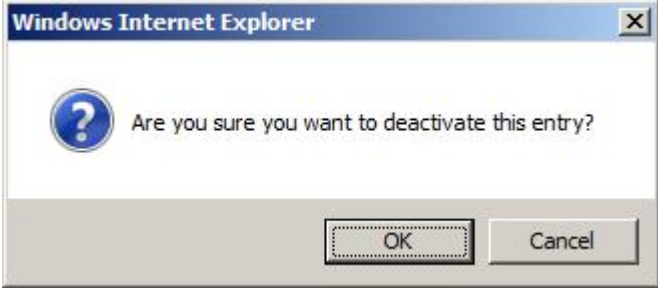
Related/Affected Client checkbox	Do NOT check this box if you are creating a new record for a household member who does not exist in ARIES.
Name	Enter a name for the household member. <i>Do not enter the person's real name</i> as this would violate the confidentiality rule. Instead, enter a unique but anonymous description of the person, e.g., "Son #2," "Older Sister" or "Father-in-Law."
Relation to Applicant	Use the dropdown to select the household member's relationship to the applicant. If "Other" is selected, complete the next field.
Other Relationship	Briefly explain "Other" in this text box.
Date of Birth	Enter the date when the household member was born. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.



Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.

Gender	Use the dropdown to select the household member's gender.
Hispanic	Use the dropdown to select Yes, No, or Unknown.
Race 1	Use the dropdown to select the household member's primary ethnicity.
Race 2	Use the dropdown to select the household member's secondary ethnicity, if applicable. This is an optional field.
CDC Disease Stage	Use the dropdown to select the severity of the household member's HIV infection.
Enter monthly income from all sources	Enter the monthly income in each appropriate field. Enter whole numbers for exact dollar amounts (e.g., for \$25.00, enter 25). ARIES will enter the decimal point and zeros for you when you save the record.
Total Monthly Income	This is a read-only field and is not editable. ARIES automatically updates the total monthly amount as you enter figures in the various text fields.
No Income or Financial Resources checkbox	Check this box if a household member does not receive any monthly income or financial resources. Once this box is checked, all text fields in the financial section become disabled.

After completing all the fields, select one of the following:

<p>Save</p>	<p>Click this button to save your entries and return to the Housing and Income Assessment Part 3 screen.</p>
<p>Cancel</p>	<p>Click Cancel to return to the Housing and Income Assessment Part 3 screen without saving your entries.</p> <p>Note: You will be prompted to confirm the cancellation.</p>  <p>To confirm the cancellation, click OK. All the information you have entered for this record will be deleted, including the Rent Worksheet. Once you click OK, you will be returned to the Housing and Income Assessment Part 3 screen.</p> <p>If you do not want to cancel the record, click Cancel and you will be returned to the Household Edit screen.</p>
<p>Deactivate</p> <p><i>This button is only visible if you have the proper permissions.</i></p>	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate a household member's record for anyone except the applicant.</p> <p>Note: You will be prompted to confirm the deactivation.</p>  <p>To confirm the deactivation, click OK. The record will be deactivated, including the Rent Worksheet. You will be returned to the Housing and Income Assessment Part 3 screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.</p> <p>If you do not want to deactivate the record, click Cancel and you will be returned to the Household Edit screen.</p>

Editing Household Members

To edit an existing household member:

From the HOPWA Housing and Income Assessment Part 3 screen, click the **Edit** button in the row of the household member you wish to edit. This brings up the HOPWA Household Edit screen.

HOPWA Household for John E Afranklin

Related/Affected Client

<p>Name <input type="text" value="John E Afranklin"/></p> <p>Relation to Applicant <input type="text" value="Other"/></p> <p>Other Relationship <input type="text" value="Applicant"/></p> <p>Date of Birth <input type="text" value="1/1/1979"/> <input type="button" value="Calendar"/></p> <p>Gender <input type="text" value="Male"/></p>	<p>Hispanic <input type="text" value="No"/></p> <p>Race 1 <input type="text" value="White"/></p> <p>Race 2 <input type="text" value=""/></p> <p>CDC Disease Stage <input type="text" value="HIV positive, asymptomatic"/></p>
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Enter Monthly income from all sources:

<p>Employment/Wages (Earned Income) <input type="text" value="2,000.00"/></p> <p>Unemployment Insurance <input type="text" value="0.00"/></p> <p>Supplemental Security Income (SSI) <input type="text" value="0.00"/></p> <p>Social Security Disability Income (SSDI) <input type="text" value="0.00"/></p> <p>Veteran's Disability Payment <input type="text" value="0.00"/></p> <p>Private Long-Term Disability Insurance <input type="text" value="0.00"/></p> <p>Worker's Compensation <input type="text" value="0.00"/></p> <p>Temporary Assistance for Needy Families <input type="text" value="0.00"/></p>	<p>General Assistance / General Relief <input type="text" value="0.00"/></p> <p>Social Security Retirement Income <input type="text" value="0.00"/></p> <p>Veteran's Pension <input type="text" value="0.00"/></p> <p>Pension/Retirement Income <input type="text" value="0.00"/></p> <p>Child Support <input type="text" value="0.00"/></p> <p>Alimony/Spousal Support <input type="text" value="0.00"/></p> <p>All Other Sources of Income <input type="text" value="0.00"/></p> <p>Total Monthly Income <input type="text" value="2,000.00"/></p>
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No income or Financial Resources

Note: When a new Housing and Income Assessment record is started, income information for the applicant and any Related/Affected clients linked to the applicant and living with the applicant is automatically added to the Household Members section.

Non-ARIES clients: When editing an existing household member record for the applicant that you have manually added to the Household Members section, all of the fields on the screen are editable (except for Total Monthly Income).

If you are editing an existing household member record for a non-ARIES client, perform the updates as needed to the Demographics section of the screen, and then continue to the financial section.

Note: When the 'Name' field is editable (that is, only when a manually entered household member is being edited), the label for this field is 'Description' (rather than 'Name') and a message in red font appears below the field: **Do Not Enter Real Name.**

HOPWA Household for Burt B Robinson

Related/Affected Client ▼

<p>Description <input type="text" value="Do Not Enter Real Name"/></p> <p>Relation to Applicant <input type="text"/></p> <p>Other Relationship <input type="text"/></p> <p>Date of Birth <input type="text"/></p> <p>Gender <input type="text"/></p>	<p>Hispanic <input type="text"/></p> <p>Race 1 <input type="text"/></p> <p>Race 2 <input type="text"/></p> <p>CDC Disease Stage <input type="text"/></p>
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Enter Monthly income from all sources:

<p>Employment/Wages (Earned Income) <input type="text"/></p> <p>Unemployment Insurance <input type="text"/></p> <p>Supplemental Security Income (SSI) <input type="text"/></p> <p>Social Security Disability Income (SSDI) <input type="text"/></p> <p>Veteran's Disability Payment <input type="text"/></p> <p>Private Long-Term Disability Insurance <input type="text"/></p> <p>Worker's Compensation <input type="text"/></p> <p>Temporary Assistance for Needy Families <input type="text"/></p>	<p>General Assistance / General Relief <input type="text"/></p> <p>Social Security Retirement Income <input type="text"/></p> <p>Veteran's Pension <input type="text"/></p> <p>Pension/Retirement Income <input type="text"/></p> <p>Child Support <input type="text"/></p> <p>Alimony/Spousal Support <input type="text"/></p> <p>All Other Sources of Income <input type="text"/></p> <p>Total Monthly Income 0 <input type="text"/></p>
---	--

No income or Financial Resources

ARIES clients: When editing an existing household member record for the applicant or an ARIES client, all the demographic fields are disabled. This information can only be edited from the Demographics tab.



If you are editing an existing household member record for an ARIES client, complete the financial section after editing the demographics section.

To Complete the Financial Section

Complete the fields as follows:

Enter monthly income from all sources	Enter the monthly income in each appropriate field. Enter whole numbers for exact dollar amounts (e.g., for \$25.00, enter 25). ARIES will enter the decimal point and zeros for you when you save the record.
Total Monthly Income	This is a read-only field and is not editable. ARIES automatically updates the total monthly amount as you enter figures in the various text fields.
No Income or Financial Resources checkbox	Check this box if a household member does not receive any monthly income or financial resources. Once this box is checked, all text fields in the financial section become disabled.

After completing all the fields, select one of the following:

	Click this button to save your entries and return to the Housing Income and Assessment Part 3 screen.
	Click Cancel to return to the Housing and Income Assessment Part 3 screen without saving your entries. Note: You will be prompted to confirm the cancellation.



To confirm the cancellation, click **OK**. All the information you have entered for this record will be deleted, including the Rent Worksheet. Once you click **OK**, you will be returned to the Housing and Income Assessment Part 3 screen.

If you do **not** want to cancel the record, click **Cancel** and you will be returned to the Household Edit screen.

Deactivate

This button is only visible if you have the proper permissions.

Note: The use of **Deactivate** has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.

Click the **Deactivate** button to deactivate a household member's record for anyone except the applicant.

Note: You will be prompted to confirm the deactivation.



To confirm the deactivation, click **OK**. The record will be deactivated, including the Rent Worksheet. You will be returned to the Housing and Income Assessment Part 3 screen.

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.

If you do **not** want to deactivate the record, click **Cancel** and you will be returned to the Household Edit screen.

2.7.16.8 Rent Worksheet

Click to view [Rent Worksheet Part 1](#).

Click to view [Rent Worksheet Part 2](#).

Click to view [Rent Worksheet Part 3](#).

Rent Worksheet Part 1

To access the Rent Worksheet:

- Click the **Rent Worksheet** button on the HOPWA Housing and Income Assessment Part 3 screen to display the Rent Worksheet Part 1 screen.

This is the first in a series of 3 screens that are required in order to complete the Rent Worksheet. Completing the Rent Worksheet is optional.

The Rent Worksheet will determine the tenant rent payment based on the greater of 10% of Monthly Gross Income or 30% of Monthly Adjusted Income.

- The total income of the household (Annual Gross Income) is from all sources anticipated to be received in the 12-month period following the effective date of the income certification. Therefore, income must be annualized (i.e., payment amount multiplied by the number of payments per year for all income sources).
- If you do complete the Rent Worksheet as part of the Housing and Income Assessment record, the Rent Worksheet must be updated:
- On an annual basis to reflect annual income adjustments.
- Any time during the current year when there is a substantial change in the household's income, an adjustment must be made to the resident rent to reflect the change in income.

Each of the three Rent Worksheet screens contains text fields that are either editable or read-only ("grayed-out"). The read-only text fields are automatically completed by the ARIES system as you enter data throughout the worksheet.

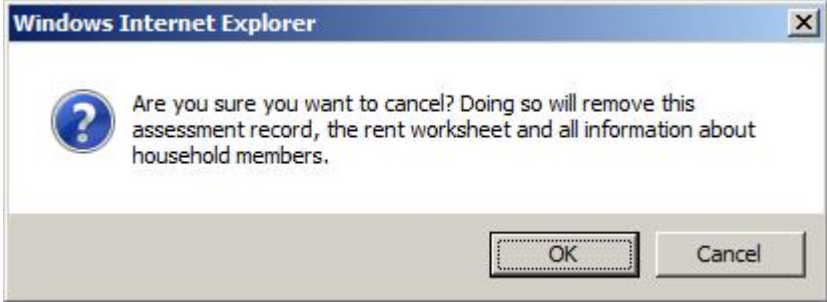

HOPWA Rent Worksheet Part 1 for John E A Franklin

This worksheet will determine the Tenant Rent Payment based on the greater of 10% of Monthly Gross Income or 30% of Monthly Adjusted Income. The total income of the household (Annual Gross Income) is from all sources anticipated to be received in the 12-month period following the effective date of the income certification. Therefore, income must be ANNUALIZED, e.g. payment amount X number of payment periods/yr., for all income sources.

1. The full amount, before payroll deductions, of wages and salaries, overtime pay, commissions, fees, tips and bonuses, other compensation for personal services prior to payroll deductions. (Applies to client and all household members 18 and older. For full-time students 18 and over, only \$480 of annual earned income should be included here.	0.00
2. Periodic payments from Social Security, annuities, insurance policies, retirement funds, pensions, disability or death benefits, excluding lump sum payments for the delayed start of a periodic payment (Except as provided in (c)(14)).	0.00
3. Payments in lieu of earnings, such as unemployment, disability, worker's compensation, and severance pay (Except as provided in (c)(3)).	0.00
4. WELFARE ASSISTANCE, including payments made under other programs funded, separately or jointly, by federal, state, or local governments which are not excluded by Federal Statutes (see Income Exclusions).	0.00
5. Periodic allowances including alimony and child support payments, and regular contributions or gifts received from organizations or persons not residing in the residence.	0.00
6. Net income from operation of a business or profession. Interest, dividends, and other net income of any kind from real or personal property. Where net family assets are in excess of \$5,000, annual income shall include the greater of actual income derived from net family assets or a percentage of the value of such assets based on the current passbook savings rate, as determined by HUD.	0.00
7. All regular pay, special pay and allowances of a member of the Armed Forces (Except Hostile Fire Pay).	0.00
8. ANNUAL GROSS INCOME* TOTAL OF LINES 1-7 Note: Annual income must be reassessed at least annually. If there is substantial change in the household's income during the year, an adjustment must be made to the resident rent to reflect the change in income.	0.00
9. MONTHLY GROSS INCOME (Line 8 divided by 12.)	0.00
10. 10% OF MONTHLY GROSS INCOME (Line 9 multiplied by .10.)	0.00

- Complete fields 1 through 7, following the on-screen instructions.
- Enter whole numbers for exact dollar amounts (e.g., for \$25.00, enter 25). ARIES will enter the decimal point and zeros for you when you save the record.
- Fields 8, 9, and 10 are read-only. ARIES automatically updates these fields as you enter data throughout the screen.

After completing all the fields, select one of the following:

<p>Save + Next ▶</p>	<p>Click this button to save your entries and proceed to the Rent Worksheet Part 2 screen.</p>
<p>Cancel</p>	<p>Click Cancel to return to the Housing and Income Assessment Part 3 screen without saving your entries.</p> <p>Note: You will be prompted to confirm the cancellation.</p>  <p>To confirm the cancellation, click OK. All the information you have entered for this worksheet record will be deleted. Once you click OK, you will be returned to the Housing and Income Assessment Part 3 screen.</p> <p>If you do not want to cancel the record, click Cancel and you will be returned to the Rent Worksheet Part 1 screen.</p>
<p>Deactivate</p>	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate a worksheet record.</p> <p>Note: You will be prompted to confirm the deactivation.</p>  <p>To confirm the deactivation, click OK. The record will be deactivated. You will be returned to the Housing and Income Assessment Part 1 screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.</p> <p>If you do not want to deactivate the record, click Cancel and you will be returned to the Rent Worksheet Part 1 screen.</p>

Rent Worksheet Part 2

HOPWA Rent Worksheet Part 2 for Hal J 9000

11. ENTER ANNUAL GROSS INCOME FROM LINE 8. 0.00

12. **\$480.00 FOR EACH DEPENDENT** Dependents, including household members under the age of 18, elderly dependents, handicapped, disabled, or full-time students, but not the family head, spouse or foster children. 0.00

13. **\$400 FOR ANY ELDERLY OR DISABLED FAMILY MEMBER.** This allowance is provided to any family whose head, spouse, or sole member is at least 62 years of age OR is handicapped/disabled. This deduction **always** applies to households with persons with HIV or AIDS if they are the head, spouse, or sole member at least 62 years of age. (ONLY ONE DEDUCTION PER FAMILY/HOUSEHOLD PER YEAR.) 400.00

14. **ANY REASONABLE CHILDCARE EXPENSES** These are expenses anticipated during the year for children 12 years of age and under that enable a household member to work, seek employment, or to further education. Deductible expenses for childcare to enable a person to work shall not exceed the amount of income received from such work. Childcare cannot be paid to another member of the household. (ONLY EXPENSES NOT REIMBURSED FROM ANY OTHER SOURCES ARE ALLOWED.) 0.00

15. **THE SUM OF THE FOLLOWING, TO THE EXTENT THE SUM EXCEEDS 3% OF ANNUAL GROSS INCOME.** This deduction may not exceed the earned income received by family members who are 18 years of age or older and who are able to work because of such attendance care or auxiliary apparatus.

i. **EXPENSES FOR NON-ELDERLY DISABLED FAMILY MEMBERS.** This allowance covers reasonable expenses anticipated during the period for attendant care (provided by a non-household member) and/or auxiliary apparatus for any disabled household member that enables that person or any other household member to work. Deduction may not exceed the amount of income generated by the person enable to work. (ONLY EXPENSES NOT REIMBURSED FROM ANY OTHER SOURCES ARE ALLOWED.)

ii. **MEDICAL EXPENSES AND/OR ASSISTANCE FOR ANY ELDERLY OR DISABLED FAMILY.** If deductions are taken on i and ii line for medical expenses, the deduction on line 13 must also be taken. (ONLY EXPENSES NOT REIMBURSED FROM ANY OTHER SOURCES ARE ALLOWED.)

a. **ENTER TOTAL** non-reimbursed expenses for this category 0.00

b. Annual Gross Income X .03 0.00 Subtract **b.** from **a.** and enter difference. 0.00




16. **EARNED INCOME DISREGARD/SELF-SUFFICIENCY INCENTIVES FOR PERSONS WITH DISABILITIES.** In addition to deductions mandated in **24CFR5.611(a)**, HUD requires disregard for income to previously unemployed persons with disabilities who have earned income as described in **24CFR5.617(a)(b)(c)(d)**. If applicable enter amount of Disregard from line E or F of the worksheet on page 4. 0.00

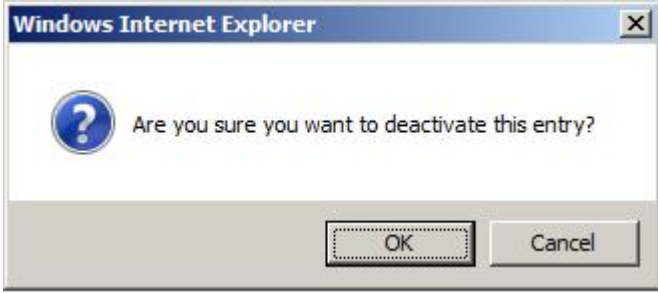
17. **ANNUAL ADJUSTED INCOME.** (Subtract line #'s 12 through 16 from the ANNUAL GROSS INCOME on line 11.) 0.00

Save + Next ▶
Cancel
Deactivate

- Complete fields 12, 14, 15a and 16, following the on-screen instructions.
- Enter whole numbers for exact dollar amounts (e.g., for \$25.00, enter 25). ARIES will enter the decimal point and zeros for you when you save the record.
- Fields 11, 13, 15b and 17 are read-only. ARIES automatically updates these fields as you enter data throughout the screen.

After completing all the fields, select one of the following:

	<p>Click this button to save your entries and proceed to the Rent Worksheet Part 3 screen.</p>
	<p>Click Cancel to return to the Housing and Income Assessment Part 3 screen without saving your entries.</p> <p>Note: You will be prompted to confirm the cancellation.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p style="text-align: center; border-bottom: 1px solid gray;">Windows Internet Explorer X</p> <div style="text-align: center;">  <p>Are you sure you want to cancel? Doing so will remove this assessment record, the rent worksheet and all information about household members.</p> </div> <div style="text-align: right; margin-top: 10px;"> OK Cancel </div> </div> <p>To confirm the cancellation, click OK. All the information you have entered for this worksheet record will be deleted. Once you click OK, you will be returned to the Housing and Income Assessment Part 3 screen.</p>

	<p>If you do not want to cancel the record, click Cancel and you will be returned to the Rent Worksheet Part 2 screen.</p>
<p>Deactivate</p> <p><i>This button is only visible if you have the proper permissions.</i></p>	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate a worksheet record.</p> <p>Note: You will be prompted to confirm the deactivation.</p>  <p>To confirm the deactivation, click OK. The record will be deactivated. You will be returned to the Housing and Income Assessment Part 1 screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.</p> <p>If you do not want to deactivate the record, click Cancel and you will be returned to the Rent Worksheet Part 2 screen.</p>

Rent Worksheet Part 3

HOPWA Rent Worksheet Part 3 for Hal J 9000

17. <u>ANNUAL ADJUSTED INCOME.</u>	0.00
18. <u>MONTHLY ADJUSTED INCOME.</u> (Line 17 divided by 12.)	0.00
19. <u>30% OF MONTHLY ADJUSTED INCOME.</u> (Multiply Line 18 by .30.)	0.00
20. RESIDENT RENT PAYMENT	0.00
Compare Line 10 to Line 19 and enter the higher number here.	
THIS IS THE RESIDENT RENT PAYMENT.	
NOTE: After the 10% and 30% calculations have been determined, the client must pay the higher of the two amounts. If either the 10% gross or 30% adjusted income amounts are greater than the Fair Market Rent (FMR- or rent standard) or the resident's actual rent, the applicant is not eligible for long-term HOPWA rental assistance.	
When determining the resident's payment portion when utilities are NOT included in the rent but need to be paid out-of-pocket by the resident, follow steps 21-23.	
21. <u>RESIDENT RENT PAYMENT</u> (enter the amount from line #20.)	0.00
22. <u>UTILITY ALLOWANCE PER HUD GUIDELINES</u> (Subtract from line #21.) Copies of HUD-approved utility allowance charts may be obtained from local Public Housing Authority offices, and are updated on a periodic basis. Allowances may vary by community.	0.00
23. TOTAL RESIDENT RENT/UTILITY PAYMENT.	0.00
Subtract Line 22 from Line 21, enter result here (may be negative)	



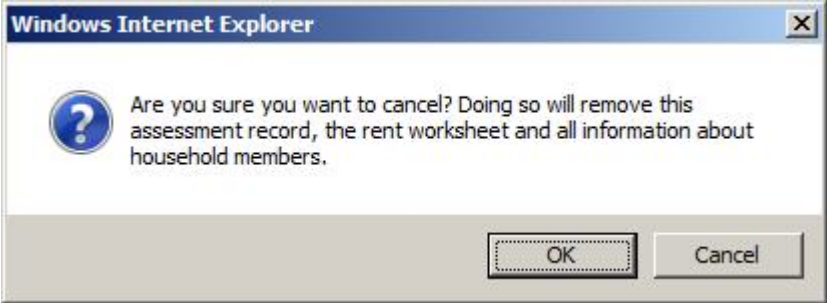

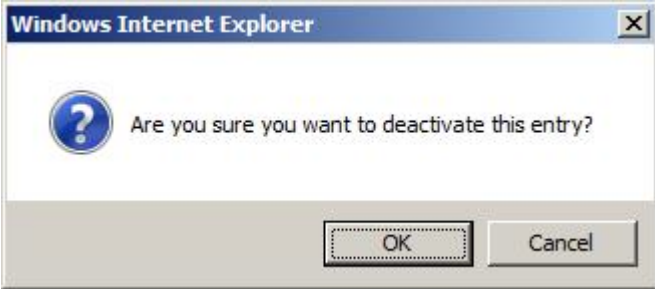
If line #23 is a negative number, this is the amount to be reimbursed to the tenant based on having paid utilities out

- Complete field 22, following the on-screen instructions.

- Enter whole numbers for exact dollar amounts (e.g., for \$25.00, enter 25). ARIES will enter the decimal point and zeros for you when you save the record.
- Fields 17 through 21 and 23 are read-only. ARIES automatically updates these fields as you enter data throughout the screen.

Note: The amount in field 23 can be a negative. If it is a negative number, this is the amount to be reimbursed to the tenant based on utilities paid out.

After completing all the fields, select one of the following:

	<p>Click this button to save your entries and return to the Housing and Income Assessment Part 3 screen.</p>
	<p>Click Cancel to return to the Housing and Income Assessment Part 3 screen without saving your entries.</p> <p>Note: You will be prompted to confirm the cancellation.</p>  <p>To confirm the cancellation, click OK. All the information you have entered for this worksheet record will be deleted. Once you click OK, you will be returned to the Housing and Income Assessment Part 3 screen.</p> <p>If you do not want to cancel the record, click Cancel and you will be returned to the Rent Worksheet Part 1 screen.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate a worksheet record.</p> <p>Note: You will be prompted to confirm the deactivation.</p>  <p>To confirm the deactivation, click OK. The record will be deactivated. You will be returned to the Housing and Income Assessment Part 1 screen.</p>

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.

If you do **not** want to deactivate the record, click **Cancel** and you will be returned to the Housing and Income Assessment Part 3 screen.

2.7.16.9 HOPWA Enrollment

If you have the proper permissions, the Enroll button becomes visible only when a client has been found eligible for HOPWA services after completing a Housing Income and Assessment record that displays an Outcome of "Eligible" on the HOPWA screen.


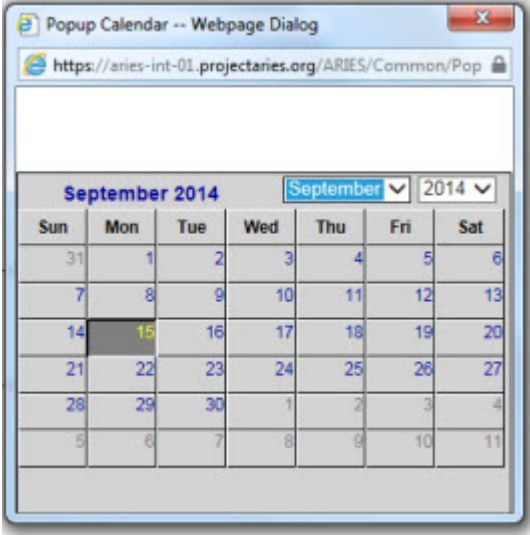
To access the HOPWA screen, navigate to the Programs screen and click the HOPWA tab in the second row of tabs.

From the "Program" dropdown list, ARIES To enroll a client in HOPWA, click the **Enroll** button.



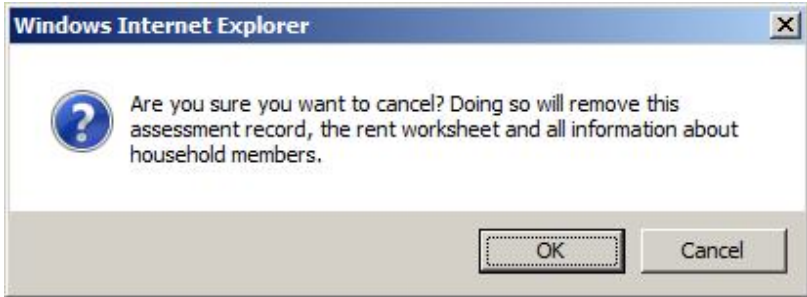


Note: If the client was disenrolled from HOPWA and is now being re-enrolled, the button is labeled **Change Status** instead of **Enroll**. For more detail on the Change Status function, click [here](#).

The Program Staff Enrollment screen is displayed.

Complete the fields as follows:

<p>Program</p>	<p>ARIES will complete this field with the entry of "HOPWA" since you are currently enrolling the client in the HOPWA program.</p> <p>Note: If the client was previously enrolled and then disenrolled, a separate longitudinal row indicating this fact will appear in the Status column. Click the dropdown in this row and select "Re-enroll."</p> 
<p>Status</p>	<p>This is a read-only field. ARIES will complete the field with a status of "Enroll" since you are enrolling the client in HOPWA for the first time.</p>
<p>Date</p>	<p>Enter the date the client is being enrolled in HOPWA. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>Agency</p>	<p>This is a read-only field. ARIES will complete the field with the name of your agency.</p>
<p>Client Program ID</p>	<p>Enter the ID number for the Client Program.</p> <p>If you do not know the ID number, select the "Auto-generate Client ID" checkbox and ARIES will generate one for you when you save the record.</p>
<p>Staff 1, 2, 3, 4</p>	<p>Use the "Staff 1" dropdown list to select the name of the staff at your agency that is primarily assigned to the client.</p> <p>If there are secondary staff(s) assigned to the client at your agency, complete staff 2, 3, and 4 text fields accordingly.</p>

After completing all the fields, select one of the following:

	<p>Click this button to save your entries and return to the HOPWA screen.</p>
	<p>Click Cancel to return to the HOPWA screen without saving your entries.</p> <p>Note: You will be prompted to confirm the cancellation.</p>  <p>To confirm the cancellation, click OK. All the information you have entered for this program enrollment will be deleted. Once you click OK, you will be returned to the HOPWA screen.</p> <p>If you do not want to cancel the record, click Cancel and you will be returned to the Program Enrollment screen.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate a program enrollment.</p> <p>You will be prompted to confirm the deactivation.</p>  <p>To confirm the deactivation, click OK. The data that is contained in the program enrollment will be deleted. Once you click OK, you will be returned to the HOPWA screen.</p> <p>If you if you do not want to deactivate the record, click Cancel and you will be returned to the Program Enrollment screen.</p>

2.7.16.10 Household Status

- Click to view [Creating a New Household Status](#)

- Click to view [Editing Household Status](#)

Creating a New Household Status

The HOPWA reports in ARIES require a client's household status to be reported at one of two time periods:

- At disenrollment (i.e., if the client disenrolls before the end of the year)
- OR
- At the end of the program year (i.e., if the client is continuing in the HOPWA program at the end of the year).

Creating the record in ARIES is the responsibility of the staff at the agencies. It is not necessary to create a Household Status record at the time of enrollment or when the status changes, only at disenrollment or at the end of the program year, i.e.:

- When you disenroll a client from HOPWA, you will need to create a Household Status record as of the same date.
- If you don't disenroll a client during the program year, then at or near (i.e., before) the end of the program year, you will need to create a Household Status record.

Note: Even though it is not necessary, it is good practice to create the Household Status record when you enroll a client in HOPWA to provide a visual reminder that you will need to update the record if the client disenrolls, or at the end of the program year.

To create a new Household Status record:

- Click the **New** button in the Household Status section of the HOPWA screen to display the Household Status screen.

HOPWA Household Status for Fred R Flintstone

Status Date Staff

HOPWA Program

Has Household disenrolled from this HOPWA Program? Yes No

Destination of Household

Housing Status

The Household has a housing plan for maintaining or establishing stable on-going housing.

If Yes, Date

The Household has had contact with case manager/benefits counselor consistent with the schedule specified in client's individual service plan.

If Yes, Date

The Household has had contact with a primary health care provider consistent with the schedule specified in client's individual service plan.

If Yes, Date

The Household has accessed and can maintain medical insurance/assistance.

If Yes, Date

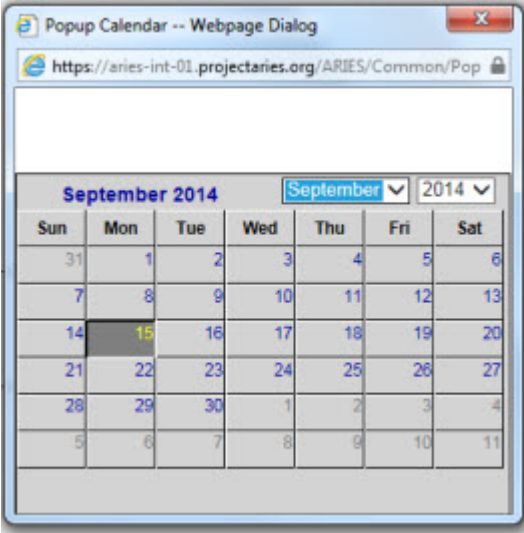
The Household has successfully accessed or maintained qualification for sources of income.

If Yes, Date



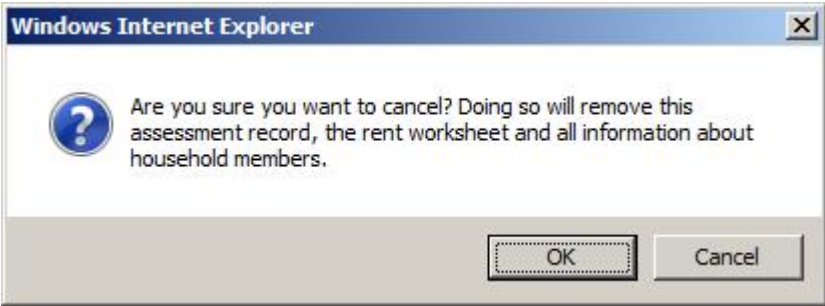
The Household has obtained an income-producing job as a result of HOPWA-funded services.

If Yes, Date

Complete the fields as follows:

<p>Date</p>	<p>Enter the date the client was enrolled in HOPWA. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>Staff</p>	<p>ARIES will automatically fill in this text box with the name of the staff creating the record. If you need to change the name, use the dropdown and select the appropriate name.</p>
<p>Has Household disenrolled from this HOPWA program? (radio buttons)</p>	<p>When set to the default "No," ARIES automatically disables the "Destination of Household" dropdown list.</p> <p>If switching to "Yes," make the appropriate selection from the "Destination of Household" dropdown.</p>
<p>Destination of Household</p>	<p>The "Destination of Household" text box is disabled unless you select a program in the "HOPWA Program" dropdown and answer "Yes" to the disenrollment question.</p>
<p>Housing Status</p>	<p>Use the dropdown to select the option that best describes the client's current living situation.</p> <p>This dropdown is activated only if the selection in HOPWA Program is "Short Term Rent, Mortgage, or Utility assistance."</p>
<p>The household has a housing plan</p>	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>If Yes, enter the date housing begins in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>

	<p>Note: If you enter a date greater than the Status date in this field, you will receive the following error message: "Housing Plan Date must be less than or equal to the Status Date."</p>
<p>The household has had contact with case manager</p>	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>If Yes, enter the date the household had contact in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>The Household has had contact with a primary health care</p>	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>If Yes, enter the date the household had contact in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>The Household has accessed and can maintain medical insurance/assistance</p>	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>If Yes, enter the date obtained medical insurance/assistance in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>The Household has successfully accessed or maintained qualification for sources of income</p>	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>To complete this field, answer the question "<i>Since enrollment or the beginning of the program year, has the household successfully accessed or maintained qualification for sources of income?</i>"</p> <p>If Yes, enter the date the household accessed or maintained qualification for sources of income in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>A member of the household has obtained</p>	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>To complete this field, answer the question "Since enrollment or the beginning of the program year, has a member of the household obtained an income-producing job that resulted from HOPWA-funded job training, employment assistance, education or related case management/counseling services?"</p>

	<p>If Yes, enter the date the household obtained an income-producing job in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
	<p>Click this button to save your entries and return to the HOPWA screen.</p>
	<p>Click Cancel to return to the HOPWA screen without saving your entries.</p> <p>Note: You will be prompted to confirm the cancellation.</p>  <p>To confirm the cancellation, click OK. All the information you have entered for this household status will be deleted. Once you click OK, you will be returned to the HOPWA screen.</p> <p>If you do not want to cancel the record, click Cancel and you will be returned to the Household Status screen.</p>

Editing Household Status

You will need to update the Household Status record if:

- You created a Household Status record when you enrolled a client in HOPWA.
- The client disenrolls from HOPWA during the program year.
- It is at or near the end of the program year.

To update an existing Household Status record:

- Click the **Edit** button in the Household Status section of the HOPWA screen to display the Household Status Edit screen.

HOPWA Household Status for Fred R Flintstone

Status Date **Staff**

HOPWA Program

Has Household disenrolled from this HOPWA Program? Yes No

Destination of Household

Housing Status

The Household has a housing plan for maintaining or establishing stable on-going housing.

If Yes, Date

The Household has had contact with case manager/benefits counselor consistent with the schedule specified in client's individual service plan.

If Yes, Date

The Household has had contact with a primary health care provider consistent with the schedule specified in client's individual service plan.

If Yes, Date

The Household has accessed and can maintain medical insurance/assistance.

If Yes, Date

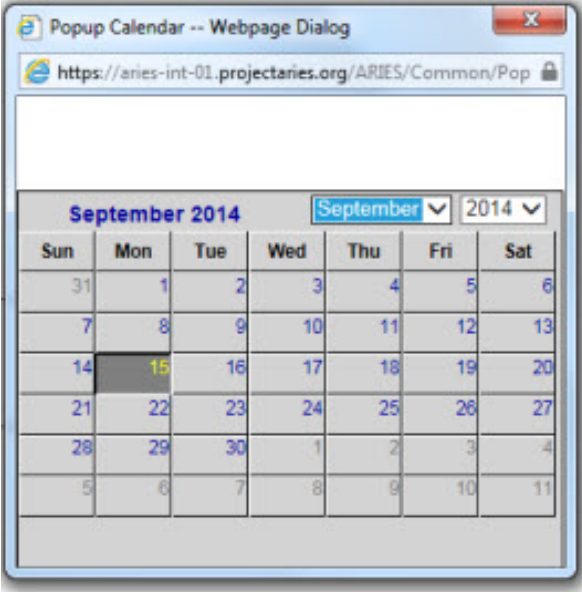
The Household has successfully accessed or maintained qualification for sources of income.

If Yes, Date



The Household has obtained an income-producing job as a result of HOPWA-funded services.

If Yes, Date

Complete the fields as follows:

<p>Status Date</p>	<p>Enter the date the client was enrolled in HOPWA. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <div style="text-align: center;">  </div> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>Staff</p>	<p>ARIES will automatically fill in this text box with the name of the staff creating the record. If you need to change the name, use the dropdown and select the appropriate name.</p>

HOPWA Program	<p>Select the appropriate option from the dropdown list:</p> <ul style="list-style-type: none"> Short Term Rent, Mortgage, or Utility assistance Tenant Based Rental Assistance Facility Based Housing-Permanent Facility Based Housing-Transitional/Short Term Facility Based Housing-Hotel/Motel assistance Permanent Housing Placement Other HOPWA Services
Has Household disenrolled from this HOPWA program? (radio buttons)	<p>Default is "No." ARIES automatically disables the "Destination of Household" dropdown list.</p> <p>If switching to "Yes," make the appropriate selection from the "Destination of Household" dropdown.</p>
Destination of Household	<p>The "Destination of Household" text box is disabled unless you select a program in the "HOPWA Program" dropdown and answer "Yes" to the disenrollment question.</p>
Housing Status	<p>Use the dropdown to select the option that best describes the client's current living situation.</p> <p>This dropdown is activated only if the selection in HOPWA Program is "Short Term Rent, Mortgage, or Utility assistance."</p>
The Household has a housing plan	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>If Yes, enter the date housing begins in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
The Household has had contact with case manager	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>If Yes, enter the date the household had contact in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
The Household has had contact with a primary health care	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>If Yes, enter the date the household had contact in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>

<p>The Household has accessed and can maintain medical insurance/assistance</p>	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>If Yes, enter the date obtained medical insurance/assistance in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>The Household has successfully accessed or maintained qualification for sources of income</p>	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>To complete this field, answer the question "Since enrollment or the beginning of the program year, has the household successfully accessed or maintained qualification for sources of income?"</p> <p>If Yes, enter the date the household accessed or maintained qualification for sources of income in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>A member of the Household has obtained employment</p>	<p>Use the dropdown to select Yes, No, or Unknown.</p> <p>To complete this field, answer the question "Since enrollment or the beginning of the program year, has a member of the household obtained an income-producing job that resulted from HOPWA-funded job training, employment assistance, education or related case management/counseling services?"</p> <p>If Yes, enter the date the household obtained an income-producing job in the date text field. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p></p>	<p>Click this button to save your entries and return to the HOPWA screen.</p>
<p></p>	<p>Click Cancel to return to the HOPWA screen without saving your entries.</p> <p>Note: You will be prompted to confirm the cancellation.</p>



To confirm the cancellation, click **OK**. All the information you have entered for this household status will be deleted. Once you click **OK**, you will be returned to the HOPWA screen.

If you do **not** want to cancel the record, click **Cancel** and you will be returned to the Household Status screen.

Deactivate

This button is only visible if you have the proper permissions.

Note: The use of **Deactivate** has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.

Click the **Deactivate** button to deactivate a household status record.

Note: You will be prompted to confirm the deactivation.



To confirm the deactivation, click **OK**. The record will be deactivated. You will be returned to the Household Status screen.

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.

If you do **not** want to deactivate the record, click **Cancel** and you will be returned to the HOPWA screen.

2.7.16.11 HOPWA Change Status

The eligibility for a client to participate in the HOPWA program may change for several reasons. Whenever you perform an update to a Housing and Income and Assessment record, it may be necessary to update the HOPWA status for the client.

To change the status of a client that is currently enrolled in HOPWA, click the **Change Status** button in the HOPWA section of the HOPWA screen.

Hal J 9000

HOPWA

Program	Status	Date	Agency	Client ID	Staff	Reason
HOPWA	Disenroll	10/20/2010	DD&D	10020		Client's decision

[Change Status](#)

The Program Enrollment Edit screen is displayed.

Hal J 9000 Program Enrollment

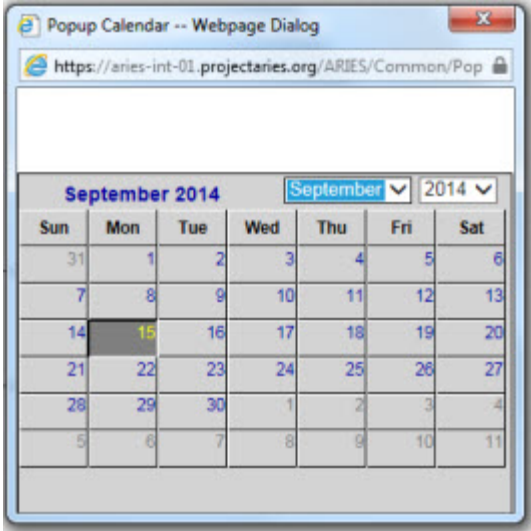
Program	Status	Date	Agency	Client Program ID
HOPWA	Enroll	3/16/2009	DD&D	10020
HOPWA	<input type="text" value="Re-enroll"/>	<input type="text" value="10/20/2010"/>	DD&D	<input type="text" value="10020"/>

Reason: Other Reason:



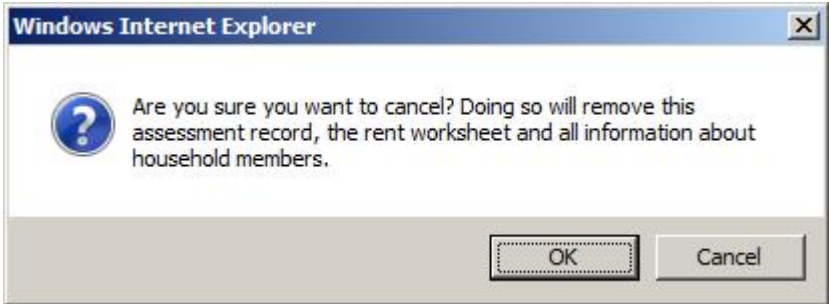
Staff 1:
 Staff 2:
 Staff 3:
 Staff 4:

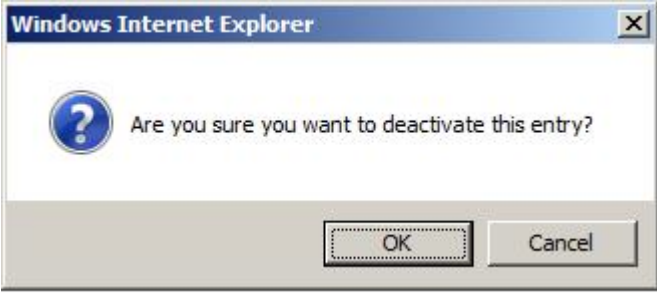
Complete the fields as follows:

Program	ARIES completes this field with the entry of "HOPWA."
Status	<p><u>If the client is re-enrolling in HOPWA:</u> Click the "Status" dropdown list and select "Re-enroll."</p> <p><u>If the client is no longer participating in HOPWA:</u> Click the "Status" dropdown list and select "Disenroll."</p>
Reason	<p>If "Disenroll" was selected, use the dropdown to indicate why the client is being disenrolled.</p> <p>If the reason isn't listed, select "Other" and indicate why in the "Other Reason" text field.</p>
Date	Enter the date the client is being re-enrolled or disenrolled in HOPWA. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.



Use the dropdown list to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.

Agency	This is a read-only field that displays the name of your agency.
Client Program ID	Displays the ID number for the Client Program.
Staff 1, 2, 3, 4	Use the "Staff 1" dropdown list to update the name of the staff at your agency that is primarily assigned to the client, if necessary. If there are secondary staff(s) assigned to the client at your agency, update staff 2, 3, 4 text fields if necessary.
	Click this button to save your entries and return to the HOPWA screen.
	Click Cancel to return to the HOPWA screen without saving your entries. Note: You will be prompted to confirm the cancellation. 
	To confirm the cancellation, click OK . All the information you have entered for this program enrollment will be deleted. Once you click OK , you will be returned to the HOPWA screen.

	<p>If you do not want to cancel the record, click Cancel and you will be returned to the Program Enrollment Edit screen.</p>
<p>Deactivate</p>	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate a record.</p> <p>Note: You will be prompted to confirm the deactivation.</p>  <p>To confirm the deactivation, click OK. The record will be deactivated. You will be returned to the HOPWA screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.</p> <p>If you do not want to deactivate the record, click Cancel and you will be returned to the Program Enrollment Edit screen.</p>

2.8 Medical

One of the key elements of the client intake process is getting an accurate medical overview of the client. Many programs provide services based on a wide variety of health criteria. Having a full medical background of the client ensures that they receive all the benefits they are eligible for. Also, the information helps clinicians deliver the most effective treatment and care.

From the Client Info screen, click the Medical tab to access the client's medical information. The Medical screen contains tabs for:

- [Basic Medical](#)
- [Medical History](#)
- [OB/GYN & Pregnancy](#)

2.8.1 Basic Medical

The Basic Medical screen appears first when you click the Medical primary tab. This screen contains the client's medical background including their primary health care providers and HIV status.

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

BASIC MEDICAL
MEDICAL HISTORY
OB/GYN & PREGNANCY
BASIC MEDICAL ARIES

Aarron X Ames (Deceased) ▲

Basic Medical Edit

Primary Medical Care: Other
Provider and Last Visit Date: Brandy Smithson; 906-454-5166; last visited 3/20/2016
Primary HIV Care: Private MD
Provider and Last Visit Date: Dr Shindler; 906-454-6278; last visited 3/19/2016
CDC Disease Stage: CDC-Defined AIDS, from Medical Record
Acuity: 145 (Karnofsky/CFA), dated 10/20/2010
Medically unable to work: Unknown dated 1/20/2009
Current Weight: 176, dated 3/28/2010
Usual weight: 179
AIDS Diagnosis: 10/20/2010 (per 3/20/2016 in Eureka IA)
Year First Tested HIV+: 2003 (5/20/2003)
Partner Notification Offered: Unknown on 5/20/2003
Partners to be notified by client: 1
Partners to be notified by health dept.: 1
Date health dept. notified: 6/20/2003
Other Chronic Medical Conditions: High blood pressure High blood pressure High blood pressure High blood pressure High blood pressure High blood pressure High blood pressure

AIDS Condition	Diagnosed	Treated
Mycobacterium of other/unknown species, dissem. or extrapul.	10/9/2010	10/29/2010

HIV Test Date	Result	County	State	Source	Pre-test Counseling	Post-test Counseling
6/1/2016	Indeterminate				Offered	Offered
6/1/2016	Indeterminate				Offered	Offered
3/28/2015	Positive	Alameda	CA	Test	Offered 3/28/2015	Unknown 3/28/2015
1/5/2015	Positive		CA		Offered 1/5/2015	Offered 1/23/2015
3/28/2009	Positive	Alameda	CA	Test	Offered 3/28/2009	Unknown 3/28/2009

The Basic Medical information includes:

Primary Medical Care/Provider	Where the client receives their basic medical services. Also listed is the date of the client's last visit, if available.
Primary HIV Care/Provider	Where the client receives HIV medical services. Also listed is the date of the client's last visit, if available.
CDC Disease Stage	The severity of the client's HIV infection.
Acuity	Your agency's assessment of HIV severity. The most current acuity score is shown. To view all acuity score entries, click the Edit button.
Medically able to work	If the client is unable to work, they may be eligible for certain benefits.
Current Weight/Usual Weight	The difference in the client's usual and current weight is used as an assessment tool. The most current weight is shown. To view all client weights, click the Edit button.
AIDS Diagnosis	This indicates whether the client has been diagnosed with AIDS. The date and testing method are also indicated.
Year First Tested HIV+	The year the client received their first positive HIV test result. If a specific date is available, enter the value in the Date First HIV+ field and ARIES will automatically populate the Year First Tested HIV+ field.
Partner Notification Offered	This indicates whether your agency has offered the client to notify their previous sexual partners of their HIV status. Also listed is the date the service was offered.

# Partners to be notified by client	How many sexual partners the client will inform of their HIV status.
# Partners to be notified by health dept.	Departments of health have partner notification programs where sexual partners of HIV-infected people are notified anonymously. Indicates how many sexual partners the health department will inform of the client's HIV status.
Date health dept. notified	Indicates the date the health department was notified of need to contact the client's partners.
Other Chronic Medical Conditions	Any health conditions the client experiences not listed elsewhere.

AIDS Condition

Near the bottom of the screen is a table that lists any AIDS defining conditions, when the client was diagnosed with the condition, and when they received treatment for the condition.

HIV Test Date

This table lists the client's HIV testing history including when and where they received testing, the results of the test, and whether pre- and post-test counseling was offered.

- To change or add any basic medical information, click the **Edit** button.

2.8.2 Basic Medical Edit

Notes

- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.
- **Special Note on CDC Disease Stage:** When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- If you attempt to save the Basic Medical edit screen without selecting a CDC Disease Stage, you receive the message "**CDC Disease Stage is required.**"
- The CDC Disease Stage field on this screen provides a dropdown list to select the CDC disease stage that most closely describes the client's current HIV status.
- "CDC" is the Centers for Disease Control and Prevention (previously the Centers for Disease Control; hence CDC). The CDC is a federally funded agency whose mission is "to create the expertise, information, and tools that people and communities need to protect their health – through health promotion, prevention of disease, injury and disability, and preparedness for new health threats." For more information, go to www.cdc.gov.

- Early in the AIDS epidemic, the CDC established Disease Stages for HIV/AIDS that describe a client's stage in the progression of the disease. These stages are used by almost all state and federal agencies for reporting HIV and AIDS cases. There are nine stages based on a combination of CD4 count/percent and HIV/AIDS-related symptoms.
- The nine categories are often grouped into three:
 - HIV asymptomatic (A1, A2).
 - HIV symptomatic (B1, B2).
 - AIDS (A3, B3, C1, C2, C3).
- The CDC defines a person with AIDS as someone with documented HIV infection and at least ONE of the following: a CD4 count < 200, a CD4 percent < 14, or an AIDS Indicator Disease. The CD4 and disease criteria are not based on the client's current status, but on the person's having met the criteria at any time since testing HIV-positive. Once a client meets this criterion, a client is always diagnosed as having AIDS regardless of their health.
- Technically, the ARIES CDC Disease Stage dropdown is not a list of the official CDC Disease Stages. It contains many more options than just the CDC stages, and uses language different from the official CDC language. This is because federal/state funding sources as well as healthcare providers need more specific information about a client's health. However, the principle remains the same: Once diagnosed with AIDS, the client should always have one of the AIDS options selected for CDC Disease Stage. Even if the client responds well to treatment and shows no symptoms of HIV disease, and even if CD4 counts/percents increase, the client is still considered to be diagnosed with AIDS, and the ARIES CDC Disease Stage should reflect that status.

Use the Basic Medical Edit screen to edit the client's existing basic medical information or add new information.

- To access this screen, from the Client Detail screen, click the Medical tab from the top row of tabs, then click the Basic Medical tab from the second row of tabs.

Bleak B Hauseman Basic Medical

Primary Med Care
Name
Phone
Last Visit

Primary HIV Care
Name
Phone
Last Visit

CDC Disease Stage *
Source

Date First HIV Positive *
Year First HIV+ *

AIDS Diagnosis Date
County
State
Source

HIV TESTS

HIV Test Date	Result	County	State	Source	Pre-test Counseling	Post-test Counseling	
2/22/2016	Positive	Alameda	CA		Offered 2/22/2016	Offered 2/22/2016	<input type="button" value="Edit"/>
2/17/2014	Negative	Contra Costa	CA		Not Offered 2/16/2014	Offered 2/17/2014	<input type="button" value="Edit"/> <input type="button" value="New"/>

AIDS DEFINING CONDITIONS

AIDS Defining Conditions	Diagnosis Date	Treatment Date	
			<input type="button" value="New"/>

Acuity Scale
Acuity Score
Acuity Date

Weight
Date

Usual Weight
Partner Notification Offered
Partner Notification Offered Date

Partners to be Notified by Client
Partners to be Notified by Health Department
Health Dept Notified Date

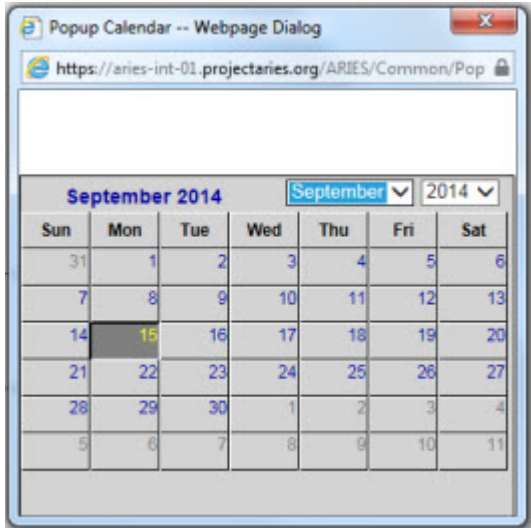
Medically unable to work
Medically Unable to Work Date

Other chronic medical conditions

At the top of the screen, complete the fields for the client's primary medical and HIV care information as follows:

Fields marked with an asterisk (*) are required fields.

<p>Primary Med Care</p>	<p>Use the dropdown to select the type of primary medical care that the client receives, e.g., alternative/complementary care, County Hospital and DPH clinics, private MD, etc.</p> <p>If the type of primary medical care is not listed, select "Unknown."</p> <p>Complete the name and phone number of the facility in the fields to the right. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345</p> <p>Enter the date of the client's last visit. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>								
<p>Primary HIV Care</p>	<p>Use the dropdown to select the type of primary HIV care that the client receives, e.g., alternative/complementary care, County Hospital and DPH clinics, private MD, etc.</p> <p>If the type of primary medical care is not listed, select "Unknown."</p> <p>Complete the name and phone number of the facility in the fields to the right. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345</p> <p>Enter the date of the client's last visit. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>								
<p>CDC Disease Stage</p>	<p>Use the dropdown to select the CDC disease stage that most closely describes the client's current HIV status, e.g., HIV-negative; HIV-positive, disease stage unknown; HIV-Positive, Asymptomatic, etc.</p> <p>Note: If you save a record for a Related/Affected individual on the Basic Medical Edit screen and the Related/Affected client's CDC Disease stage is changed to anything other than 'Unknown' or 'HIV Negative', ARIES will no longer classify them as 'Related/Affected.'</p> <p>The table below describes the meanings of the CDC Disease State dropdown options.</p> <table border="1" data-bbox="376 1457 1414 1869"> <tr> <td data-bbox="383 1457 711 1520"> <p>HIV negative</p> </td> <td data-bbox="717 1457 1408 1520"> <p>The client tested negative for HIV.</p> </td> </tr> <tr> <td data-bbox="383 1528 711 1646"> <p>HIV positive, disease stage unknown</p> </td> <td data-bbox="717 1528 1408 1646"> <p>The client tested positive for HIV and does not know the stage of infection.</p> </td> </tr> <tr> <td data-bbox="383 1654 711 1751"> <p>HIV positive, asymptomatic</p> </td> <td data-bbox="717 1654 1408 1751"> <p>The client is HIV+ but experiences no symptoms associated with HIV.</p> </td> </tr> <tr> <td data-bbox="383 1759 711 1869"> <p>HIV positive, symptomatic, not AIDS</p> </td> <td data-bbox="717 1759 1408 1869"> <p>The client is HIV+, experiences HIV-related symptoms, but does not meet the CDC definition of AIDS.</p> </td> </tr> </table>	<p>HIV negative</p>	<p>The client tested negative for HIV.</p>	<p>HIV positive, disease stage unknown</p>	<p>The client tested positive for HIV and does not know the stage of infection.</p>	<p>HIV positive, asymptomatic</p>	<p>The client is HIV+ but experiences no symptoms associated with HIV.</p>	<p>HIV positive, symptomatic, not AIDS</p>	<p>The client is HIV+, experiences HIV-related symptoms, but does not meet the CDC definition of AIDS.</p>
<p>HIV negative</p>	<p>The client tested negative for HIV.</p>								
<p>HIV positive, disease stage unknown</p>	<p>The client tested positive for HIV and does not know the stage of infection.</p>								
<p>HIV positive, asymptomatic</p>	<p>The client is HIV+ but experiences no symptoms associated with HIV.</p>								
<p>HIV positive, symptomatic, not AIDS</p>	<p>The client is HIV+, experiences HIV-related symptoms, but does not meet the CDC definition of AIDS.</p>								

	<table border="1"> <tr> <td data-bbox="375 193 708 327">HIV positive, disabling</td> <td data-bbox="708 193 1429 327">The client is HIV+, does not meet the CDC definition of AIDS, but is incapacitated by HIV-related symptoms.</td> </tr> <tr> <td data-bbox="375 327 708 457">CDC-Defined AIDS</td> <td data-bbox="708 327 1429 457">The client is HIV+ and matches the criteria for AIDS set by the Centers for Disease Control and Prevention (CDC).</td> </tr> <tr> <td data-bbox="375 457 708 617">Disabling AIDS</td> <td data-bbox="708 457 1429 617">The client is HIV+, matches the criteria for AIDS set by the Centers for Disease Control and Prevention (CDC) and is incapacitated by their illness.</td> </tr> <tr> <td data-bbox="375 617 708 747">Pediatric indeterminate</td> <td data-bbox="708 617 1429 747">A child under age 2 who was born to an HIV-infected mother but whose HIV status is not yet definite.</td> </tr> <tr> <td data-bbox="375 747 708 877">Pediatric, confirmed HIV positive</td> <td data-bbox="708 747 1429 877">A child under the age of 2 who was born to an HIV-infected mother whose HIV status has been confirmed.</td> </tr> <tr> <td data-bbox="375 877 708 940">Unreported</td> <td data-bbox="708 877 1429 940">The client's HIV status was not assessed.</td> </tr> <tr> <td data-bbox="375 940 708 1003">Unknown</td> <td data-bbox="708 940 1429 1003">The client's HIV status is not known.</td> </tr> </table>	HIV positive, disabling	The client is HIV+, does not meet the CDC definition of AIDS, but is incapacitated by HIV-related symptoms.	CDC-Defined AIDS	The client is HIV+ and matches the criteria for AIDS set by the Centers for Disease Control and Prevention (CDC).	Disabling AIDS	The client is HIV+, matches the criteria for AIDS set by the Centers for Disease Control and Prevention (CDC) and is incapacitated by their illness.	Pediatric indeterminate	A child under age 2 who was born to an HIV-infected mother but whose HIV status is not yet definite.	Pediatric, confirmed HIV positive	A child under the age of 2 who was born to an HIV-infected mother whose HIV status has been confirmed.	Unreported	The client's HIV status was not assessed.	Unknown	The client's HIV status is not known.
HIV positive, disabling	The client is HIV+, does not meet the CDC definition of AIDS, but is incapacitated by HIV-related symptoms.														
CDC-Defined AIDS	The client is HIV+ and matches the criteria for AIDS set by the Centers for Disease Control and Prevention (CDC).														
Disabling AIDS	The client is HIV+, matches the criteria for AIDS set by the Centers for Disease Control and Prevention (CDC) and is incapacitated by their illness.														
Pediatric indeterminate	A child under age 2 who was born to an HIV-infected mother but whose HIV status is not yet definite.														
Pediatric, confirmed HIV positive	A child under the age of 2 who was born to an HIV-infected mother whose HIV status has been confirmed.														
Unreported	The client's HIV status was not assessed.														
Unknown	The client's HIV status is not known.														
Source	Use the dropdown to select the source from where the client's HIV status was reported, e.g., Letter of Diagnosis, etc.														
Date First HIV+	<p>In the text field, enter the date the client first tested positive for HIV. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> 														

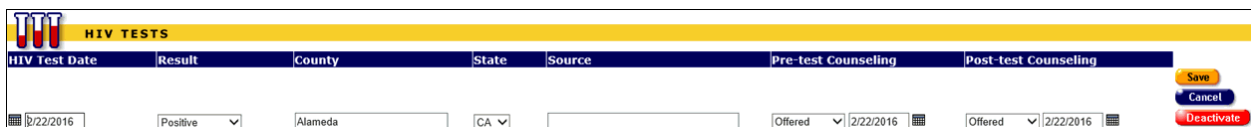
	<p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p> <p>Note: CDC Disease Stage "Indeterminate" is not valid for clients over 21 months old. A client who is 21 months or older and has previously been assigned a CDC Disease Stage of "Pediatric indeterminate" should be reported on the RSR as "Unknown." Note that a similar rule for "Pediatric, confirmed HIV-positive" is NOT required, since these clients are reported on the RSR as HIV positive regardless of age.</p>
Year First HIV+	In the text field, enter the year the client first tested positive for HIV. Use the format MM/DD/YYYY.
AIDS Diag Date	<p>If the client has been diagnosed with AIDS, enter the date of the diagnosis. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p> <p>Note: If the year in AIDS Diag Date is AFTER the end of the RSR report period, the AIDS diagnosis year is changed to the RSR report end date year.</p> <p>If the client has not been diagnosed with AIDS, leave this field blank.</p>
County	<p>If the client has been diagnosed with AIDS, enter the County in which the client was diagnosed.</p> <p>If the client has not been diagnosed with AIDS, leave this field blank.</p>
State	<p>If the client has been diagnosed with AIDS, use the dropdown to select the state in which the client was diagnosed.</p> <p>If the client has not been diagnosed with AIDS, leave this field blank.</p>
Source	<p>If the client has been diagnosed with AIDS, enter the source from where the client's AIDS status was reported, e.g., Letter of Diagnosis, etc.</p> <p>If the client has not been diagnosed with AIDS, leave this field blank.</p>

HIV Tests Section

Use the HIV Tests section of the screen to edit existing HIV test information, or to add new test information.

- To add new HIV test information, click the **New** button.
- To edit existing HIV test information, click the **Edit** button.

Both actions put the HIV Tests section of the Basic Medical Edit screen into Edit mode.






Complete the fields as follows:

Fields marked with an asterisk (*) are required fields.

HIV Test Date	Enter the date of the client's HIV test. Use the format MM/DD/YYYY. Or use the pop-up calendar.
Result	From the dropdown, select the result of the client's HIV test.
County	Enter the name of the county in which the HIV test was performed.
State	From the dropdown, select the state in which the HIV test was performed.
Source	Enter the source by which the client's HIV test date was reported, e.g., Letter Clinic.
Pre-test Counseling	Use the dropdown to indicate whether pre-test counseling was offered and, if so, the date of offer. You may type the date (format MM/DD/YYYY) in the text window or use the pop-up calendar.
Post-test Counseling	Indicate whether post-test counseling was offered and, if so, the date of offer. You may type the date (format MM/DD/YYYY) in the text window or use the pop-up calendar.

When you have completed your entries:

	Click the Save button to store your changes to ARIES and return to the Basic Medical Edit screen, where your new entries are now displayed.
	Click Cancel to return to the Basic Medical Edit screen without saving changes.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended. Click Deactivate to remove an HIV test result from view.

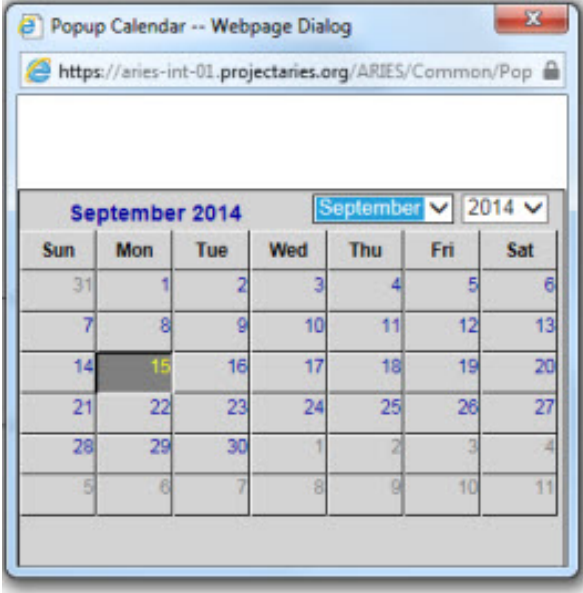
AIDS Defining Conditions Section

This table lists any AIDS defining conditions the client has been diagnosed with as they appear in the Centers for Disease Control and Prevention HIV case report form.

- To edit an existing entry, click the **Edit** button.
- To add a new entry, click the **New** button.

Both actions put the AIDS Defining Conditions section of the Basic Medical edits screen into Edit mode.

Complete the fields as follows:

AIDS Defining Condition	From the dropdown, select the appropriate defining condition. If the condition is not listed, select "Other Diagnosis" from the dropdown.
if Other	If you selected "Other Diagnosis" from the dropdown, enter text to complete the "if Other" window.
Diagnosis Date	<p>Enter the diagnosis date. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
Treatment Date	Enter the treatment date. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.

When you have completed your entries, use the **Save**, **Cancel** or **Deactivate** button as appropriate.

Acuity and Weight Section

Use the Acuity and Weight section of the screen to edit existing acuity/weight information, or to add new acuity/weight information.

- To add new acuity/weight information, click the **New** button.

- To edit existing acuity/weight information, click the **Edit** button.
Both actions put the Acuity and Weight section of the Basic Medical Edit screen into Edit mode.

Acuity Scale	Acuity Score	Date	
Karnofsky/CFA	95	1/8/2010	<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Deactivate"/>

Complete the fields as follows:
Fields marked with an asterisk (*) are required fields.

Acuity Scale	Enter the name of the acuity scale used.
Acuity Score	Enter the client's acuity score.
Date	Enter the date on which the acuity scoring was performed. Use the format MM/DD/YYYY. Or use the pop-up calendar.

When you have completed this row, use the **Save**, **Cancel** or **Deactivate** button as appropriate. Note that the Weight section has its own **Edit** and **New** buttons.

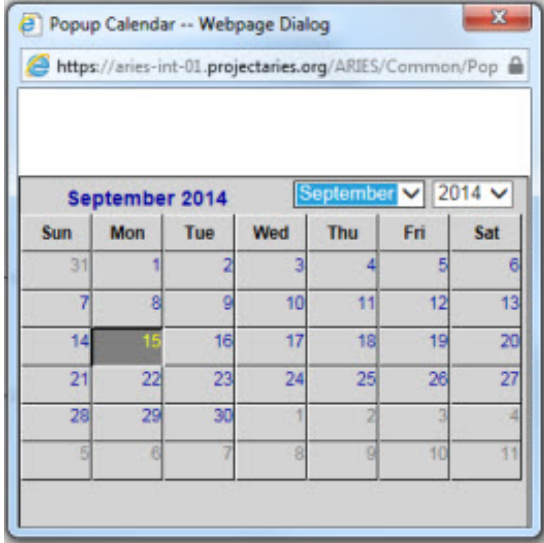
Weight	Date	
172	1/6/2010	<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Deactivate"/>

Weight	Enter the usual weight of the client.
Date	Enter the date on which the client was weighed. Format MM/DD/YYYY. Or use the pop-up calendar.

Usual Weight	<input type="text"/>
Partner Notification Offered	<input type="text"/>
# Partners to be Notified by Client	<input type="text"/>
# Partners to be Notified by Health Department *	<input type="text"/>
Medically unable to work	<input type="text"/>
Other chronic medical conditions	<input type="text"/>

In the bottom section of the screen, complete the fields as follows.

Fields marked with an asterisk (*) are required fields.

Usual Weight	Enter the usual weight of the client.
Partner Notification Offered	Use the Yes/No dropdown to indicate whether partner notification was offered.
Dated	<p>If partner notification was offered, enter the date. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
# Partners to be Notified by Client	Enter the number of partners to be notified by the client. If no partners are to be notified, enter zero.
# Partners to be Notified by Health Department	Enter the number of partners to be notified by the Health Department. If no partners are to be notified, enter zero.
Date Health Department Notified	If any partners are to be notified by the Health Department, enter the date that the Health Department was notified. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
Medically unable to work	Use the Yes/No dropdown to indicate whether the client is medically unable to work.

Other chronic medical conditions	If the client has any other chronic medical conditions not covered above, enter them in the text box. This is a scrollable field.
---	---

When you have completed all entries on the screen:

Save + Next	Click the Save + Next button to save your entries and advance to the client's Medical History Edit screen.
Save + Done	Click Save + Done to store your new entries and return to the read-only Basic Medical screen, where your updates are now displayed.
Cancel	Click Cancel to return to the Basic Medical screen without saving any changes.

2.8.3 Medical History

To access this screen, click the Medical tab from the top row of tabs, then click the Medical History tab from the second row of tabs.

Hiram S ATestool ⚠

Medical History **Edit** **Flowsheet**

Most recent CD4: 888 as of 3/21/2017, 25.00%
Lowest CD4: 798 as of 3/31/2015, 39.00%
Most recent Viral Load: 199 as of 6/30/2015, 2.3, Roche PCR Ultrasensitive
Highest Viral Load: 530 as of 4/1/2015, 2.7, Roche PCR Ultrasensitive
Most Recent TB Test: PPD Test on 5/11/2015, Non-reactive, 6/1/2015; IGRA Test on 7/1/2017, Negative, 7/5/2017; Chest X-Ray Test on 6/1/2016, Negative, 6/18/2016
Most Recent TB Treatment:

STI/Hep	Test Date	Diagnosis	Lab Value	Tx Ind?	Treat Date	Outcome	Notes
Hepatitis B	1/1/2016	Presumptive					
Hepatitis C	3/31/2015	Presumptive					
Syphilis	3/31/2015	Presumptive					

TB Test Type	Test Date	Outcome	Outcome Date
IGRA	7/1/2017	Negative	7/5/2017
Chest X-Ray	6/1/2016	Negative	6/18/2016
PPD	5/11/2015	Non-reactive	6/1/2015

Immunization	Is not medically indicated	Date Immunized
BCG	false	3/31/2015

Hospital Visit	ER	Reason	Hospitalized?	Days Hosp.
4/1/2015	Yes	Not HIV/AIDS Related	Yes	2

The Medical History information includes:

Most recent CD4	The most current CD4+ T-lymphocyte count including the date of testing and the lymphocyte percentage.
------------------------	---

Lowest CD4	The lowest recorded CD4+ T-lymphocyte count including the date of testing and the lymphocyte percentage.
Most recent Viral Load	The most recent viral load test (VLT) results including the date of testing and the log value.
Highest Viral Load	The highest viral load test (VLT) result including the date of testing and the log value.
TB Test Medically Indicated	The client's medical condition or history indicates that a TB test should be done.
TB PPD Skin Test	The result of the client's tuberculosis purified protein derivative (TB PPD) test. The first date indicates when the test was administered; the second date indicates when the skin test was read.
IGRA Test	Interferon Gamma Release Assay or IGRA, is a blood test that looks for TB germs in the body. The TB blood test can be done instead of a TB skin test. The first date indicates the most recent testing date; the second date indicates the date of the lab result.
Chest X-Ray	Chest X-rays are used to diagnose tuberculosis. This entry indicates the date and result of the X-ray.
TB Treatment Status	Indicates what steps have been taken for tuberculosis treatment.
STI/HEP Table	This table lists the types, dates and results of the client's sexually transmitted infections and hepatitis testing. Also listed is the date of any treatment received and completed.
Immunization Table	This table lists immunizations the client has received including the date of immunization.
Hospital Visit Table	This table lists any emergency room or hospital visits the client has had and the dates. The Reason column indicates whether the visit was HIV-related or not. Also, if the client was hospitalized, the number of hospitalization days is listed.

To Edit the Record or Add New Information, click the **Edit** button, which takes you to the [Medical History Edit](#) screen.

2.8.4 Medical History Edit

Notes:

- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "Check the client's CDC Disease Status." ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in


the client intake screens. Once you supply this information, the red message will disappear.

- RSR data on IGRA (TB) test results and date is taken from the Medical History Edit screen. Before running RSR, sure to enter client data on this screen.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

Use this screen to edit a client's existing medical history, or to enter new information regarding the client's medical history. This screen is separated into three sections: Tests, Immunizations, and ER/Hospital Visits.

- [Tests](#)
- [Immunizations](#)
- [ER/Hospital Visits](#)

Hyrarn S ATestool Medical History Edit


TESTS


CD4 Date *	T Cell Count *	%		Viral Load Date *	Value *	Test Type	Log	
7/1/2015	920	42	<input type="button" value="Edit"/>	6/30/2015	= 199	Roche PCR Ultrasensitive	2.3	<input type="button" value="Edit"/>
3/31/2015	798	39	<input type="button" value="Edit"/> <input type="button" value="New"/>	4/1/2015	= 530	Roche PCR Ultrasensitive	2.7	<input type="button" value="Edit"/> <input type="button" value="New"/>

STI/Hepatitis *	Date *	Diagnosis *	Lab Value	Tx Ind?	Treatment Start Date	Treatment End Date	Outcome	Notes
Syphilis	3/31/2015	Presumptive						<input type="button" value="Edit"/>
Hepatitis B	3/31/2015	Presumptive						<input type="button" value="Edit"/>
Hepatitis C	3/31/2015	Presumptive						<input type="button" value="Edit"/> <input type="button" value="New"/>


Tuberculosis

TB Test Type *	Test Date *	Outcome	Outcome Date
Chest X-Ray	6/15/2015	Positive	6/20/2015
PPD	5/11/2015	Non-reactive	6/2/2015

TB Treatment Type	TB Treatment Status	Start Date	End Date	Is multi drug resistant
Treatment	Completed	6/30/2015	1/29/2016	Yes


IMMUNIZATIONS

Immunization Type *	Is not medically indicated *	Date *
Hepatitis B - Dose 3	false	3/31/2015


ER / HOSPITAL VISITS

Date	ER Visit	Reason	Hospitalized	If hospitalized, # of days
<input type="button" value="New"/>				

[Contact Information](#)

2.8.4.1 Tests

The Tests section lists the client's HIV-related and STI test results.

Notes

- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.
- Remember, if your agency is a medical provider, the CD4 and Viral Load fields are required for the RSR and RDR.
- Whenever possible, use lab results or documentation rather than relying on the client self-reporting the CD4 and Viral Load information.
- If possible, have provider agency staff double check the CD4 and Viral Load entries.
- If the client is a share client, you will be able to see CD4 and VL counts that other agencies have entered.
- The percent field for CD4 is not required. You can leave it blank. Do not enter 0.

CD4 Tests

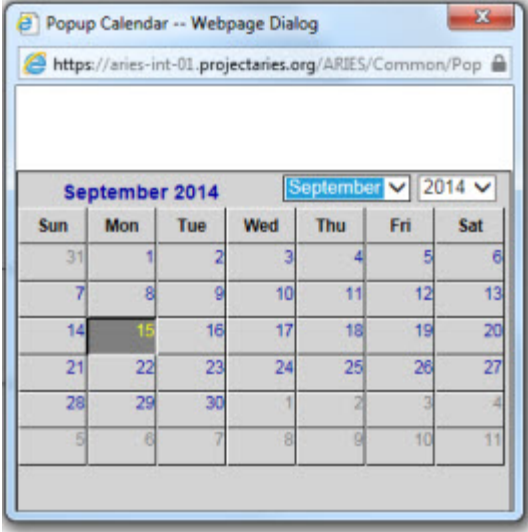




TESTS		
CD4 Date *	T Cell Count *	%
6/30/2010	400	33

To enter a new test result, click the **New** button. A new row appears, with the columns blank.

TESTS		
CD4 Date *	T Cell Count *	%
<input type="text" value="6/30/2010"/>	<input type="text" value="400"/>	<input type="text" value="33"/>

Complete the fields as follows:

CD4 Date	Enter the date the CD4 test was administered. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
-----------------	--

	 <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
T Cell Count	Enter the client's new T-cell count.
%	Enter the client's new T-lymphocyte percentage. Do not include the % sign; ARIES will supply this.
	Click the Save button to save your entries and return to the Medical History Edit screen.
	Click the Cancel button to return to the Medical History Edit screen without saving your entries.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate the CD4 row. Once deactivated, the CD4 row will no longer appear on the Medical History screen.</p>  <p>To confirm the deactivation, click OK. The record will be deactivated. You will be returned to the Medical History Edit screen.</p>

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the CD4 row.

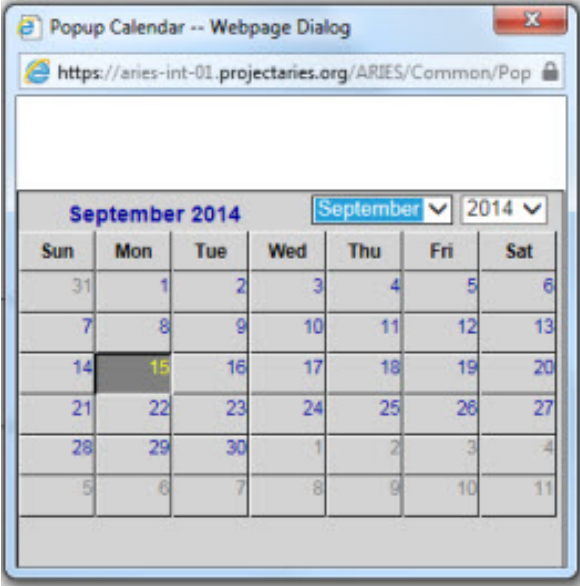
Viral Load Tests (VLT)




Viral Load Date	Value	Test Type	Log
11/9/2009	= 873,941	Roche PCR Standard	5.9

- To enter a new VLT result, click the **New** button.
- To edit an existing resulting, click the **Edit** button. A new row appears, with the columns blank.

Viral Load Date	Value	Test Type	Log
<input type="text" value="11/9/2009"/>	<input type="text" value="= 873941"/>	<input type="text" value="Roche PCR Stand"/>	

Complete the fields as follows:

<p>Viral Load Date</p>	<p>Enter the date the Viral Load test was administered. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> 
-------------------------------	---

	For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.
< = >	If the VLT is less than the value entered, select "<". If the VLT is greater than the value entered, select ">". Otherwise, select "=".
Value	Enter the client's VLT result. The number must be between 1 and 9,999,999. Do not type commas; ARIES will supply them. If the value is inexact or if it exceeds the range accepted, use the Relation <=> dropdown list (see above).
Test Type	Use the dropdown to select the appropriate viral load Test Type, if known.
Log	When you click the Save button, ARIES calculates the log value and enters it in this column.
	Click the Save button to save your entries and return to the Medical History Edit screen.
	Click the Cancel button to return to the Medical History Edit screen without saving your entries.
	Note: The Deactivate button displays when you are editing an existing row, but not when you enter a new row. Click the Deactivate button to deactivate the Viral Load row. Once deactivated, the Viral Load row will no longer appear on the Medical History screen. Note: You will be prompted to confirm the deactivation. To confirm the deactivation, click OK . The record will be deactivated. You will be returned to the Medical History Edit screen. Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the Viral Load row.

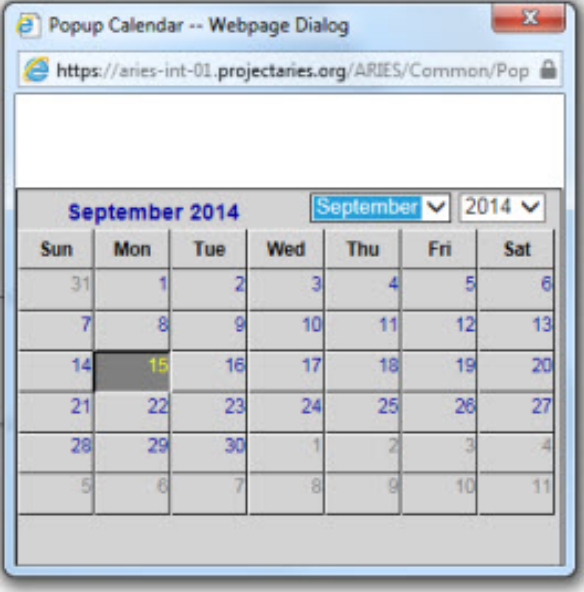
STI/Hepatitis Tests




To enter a new test result, click the **New** button. A new row appears, with the columns blank.

STI/Hepatitis	Date	Diagnosis	Lab Value	Tx Ind?	Treatment Start Date	Treatment End Date	Outcome	Notes
Human papillomavirus (genital warts)	3/9/2009	Not medically indicated						
Syphilis	1/1/2009	Unknown	1,358					
Hepatitis B	1/1/2009	Negative diagnostic test <input type="checkbox"/> Is not medically indicated	2,548	No				

Complete the fields as follows:

<p>STI/Hepatitis</p>	<p>Make a selection from the dropdown to indicate which test the client received, e.g., genital herpes, gonorrhea, hepatitis A, B, or C.</p>
<p>Date</p>	<p>Enter the date the test was administered. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>Is not medically indicated (checkbox)</p>	<p>Check this field if a test or treatment is not medically indicated. Leave unchecked if a test <i>is</i> medically indicated.</p> <p>Note: If you check this box, ARIES will not allow entries in the other fields on this row except in the STI/Hepatitis dropdown and the Date field.</p>
<p>Diagnosis</p>	<p>Use the dropdown to select the result of the test, e.g., positive diagnosis, negative diagnosis.</p> <p>If the result of the diagnosis is not known, select "Unknown."</p>
<p>Lab Value</p>	<p>If the test result includes a lab value, enter the number here.</p>
<p>Tx Ind?</p>	<p>Use the Yes/No dropdown to select whether a treatment was indicated.</p> <p>If the client refused indicated treatment, select "Patient Refused."</p>
<p>Treatment Start Date</p>	<p>If the client tested positive, enter the date they began treatment. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>If the client tested negative, leave this field empty.</p>

Treatment End Date	Enter the date the treatment ended. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon. If the client is still undergoing treatment, leave this field empty.
Outcome	Make a selection from the dropdown to indicate the treatment outcome: Completed, Not Completed, Unknown, Not Applicable.
Notes	Enter any additional notes or comments regarding the testing.
	Click the Save button to save your entries and return to the Medical History Edit screen.
	Click the Cancel button to return to the Medical History Edit screen without saving your entries.
	Note: The Deactivate button displays when you are editing an existing row, but not when you enter a new row. You will be prompted to confirm the deactivation. Click the Deactivate button to deactivate the STI and Hepatitis information row. You will be prompted to confirm the deactivation. Once deactivated, the STI and Hepatitis information row will no longer appear on the Medical History Edit screen. Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the STI and Hepatitis information row.

Tuberculosis Tests

This section of the screen requests information about the client's Tuberculosis testing.

- To enter a new result, click **New**, or click **Edit** to change an existing entry.
- Click **Save** when you are finished, or click **Cancel** to return to the [Medical History Edit](#) screen without saving changes.
- To remove an entry from view, click the **Deactivate** button.

Tuberculosis

TB Test Type *	Test Date *	Outcome	Outcome Date	
Chest X-Ray	6/15/2015	Positive	6/20/2015	
PPD	5/11/2015	Non-reactive	6/2/2015	 

TB Treatment Type	TB Treatment Status	Start Date	End Date	Is multi drug resistant	
Treatment	Completed	6/30/2015	1/29/2016	Yes	 

Fields marked with an asterisk (*) are required fields.

Complete the fields as follows:

TB Test Type	Dropdown: Test Type options are PPD, IGR, and Chest X-Ray. This is a required entry.
---------------------	--

Test Date	Enter the date the TB test was done. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
Outcome	Outcome is context-sensitive based on testType value as follows: PPD - Reactive, Non-reactive, Lost to Follow Up. IGRA - Positive, Negative, Unknown. Chest X-Ray – Positive, Negative
Outcome Date	This is a required field when Outcome is entered. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
Edit	Selecting Edit will allow you to Edit a record that has already been saved. Depending on your permissions you may be able to deactivate the record, thereby removing it from view and from all reports, but not the database. All users may either cancel out of the edit screen and return to the record without saving any changes or will be able to save any desired changes.
New	Selecting New will allow you to enter a new TB test test.

TB Treatment Type

This section contains the client's tuberculosis treatment information.

- To enter new tuberculosis treatment type and status information, click the **New** button. A new row appears, with the columns blank.
- To edit an existing row, click **Edit**.




Tuberculosis

TB Test Type	Test Date	Outcome	Outcome Date	
Chest X-Ray	6/15/2015	Positive	6/20/2015	Edit
PPD	5/11/2015	Non-reactive	6/2/2015	Edit
				New

TB Treatment Type	TB Treatment Status	Start Date	End Date	Is multi drug resistant	
Treatment	Completed	6/30/2015	1/29/2016	Yes	Edit
					New







Complete the fields as follows:

TB Treatment Type	Use the dropdown to select the client's new treatment type, e.g., treatment, prophylaxis. If the client tested negative, select "N/A." If the treatment type is unknown, select "Unknown."
TB Treatment Status	Use the dropdown to select the client's new treatment status.



Start Date	Enter the start date of the new treatment status. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
End Date	Enter the end date of the treatment. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
Is multi-drug resistant	Select 'Yes' or 'No'
	Click the Save button to save your entries and return to the Medical History Edit screen.
	Click the Cancel button to return to the Medical History Edit screen without saving your entries.
	<p>Note: The Deactivate button displays when you are editing an existing row, but not when you enter a new row.</p> <p>Click the Deactivate button to deactivate the TB treatment status information row. You will be prompted to confirm the deactivation. Once deactivated, the TB treatment status information row will no longer appear on the Medical History Edit screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the TB treatment status information row.</p>

2.8.4.2 Immunizations



The immunization table lists all immunizations the client has received.

 IMMUNIZATIONS			
Immunization Type *	Is not medically indicated *	Date *	
Flu	false	10/12/2007	
Flu	false	10/1/2004	
Hepatitis B - Dose 1	false	3/5/2003	
Pneumovax	false	6/2/2002	
			


- To enter new immunization information, click the **New** button. A new row appears, with the columns blank.



 IMMUNIZATIONS			
Immunization Type *	Is not medically indicated *	Date *	
Tetanus	false	2/2/2010	
<input type="text"/>	<input type="checkbox"/> Is not medically indicated	<input type="text"/>	 

Complete the fields as follows:




<p>Immunization Type</p>	<p>Use the dropdown to select the client's immunization type, e.g., Hepatitis A, Tetanus, BCG, etc.</p> <p>If the immunization type is not listed, select "Other."</p>
<p>Is not medically indicated (checkbox)</p>	<p>Check this box if the immunization type is not medically indicated.</p> <p>Note: For Hepatitis vaccination, if the data is not found to support a "Not Medically Indicated" or a "Yes" response, the system substitutes the default response of "No."</p>
<p>Date</p>	<p>Enter the date of the immunization, format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <div data-bbox="516 600 1040 1129" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>The screenshot shows a web browser dialog box titled "Popup Calendar -- Webpage Dialog" with the URL "https://aries-int-01.projectaries.org/ARIES/Common/Pop". It contains a calendar for September 2014. The calendar has a header with "September 2014", a month dropdown set to "September", and a year dropdown set to "2014". The days of the week are listed as Sun, Mon, Tue, Wed, Thu, Fri, Sat. The dates are arranged in a grid, with the 15th of the month highlighted in yellow.</p> </div> <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p></p>	<p>Click the Save button to save your entries and return to the Medical History Edit screen.</p>
<p></p>	<p>Click the Cancel button to discard your entries and return to the Medical History Edit screen.</p>

- To edit existing immunization data, click the **Edit** button to the right of the row.

 **IMMUNIZATIONS**

Immunization Type *	Is not medically indicated *	Date *	
Tetanus	<input type="checkbox"/> Is not medically indicated	2/2/2010 	  






<p>Immunization Type</p>	<p>Use the dropdown to select the client's immunization type, e.g., Hepatitis A, Tetanus, BCG, etc.</p>
---------------------------------	---

	If the immunization type is not listed, select "Other."
Is not medically indicated (checkbox)	Check this box if the immunization type is not medically indicated. Note: For Hepatitis vaccination, if the data is not found to support a "Not Medically Indicated" or a "Yes" response, the system substitutes the default response of "No."
Date	Enter the date of the immunization, format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
	Click the Save button to save your entries and return to the Medical History Edit screen.
	Click the Cancel button to discard your entries and return to the Medical History Edit screen.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended. This option is only available to users with the appropriate permission level. Click the Deactivate button to deactivate the immunization information row. Once deactivated, the immunization data row will no longer appear on the Medical History Edit screen. Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the immunization information row.

2.8.4.3 ER/Hospital Visits

The bottom of the [Medical History Edit](#) screen contains a table of the client's emergency room and hospital visits.

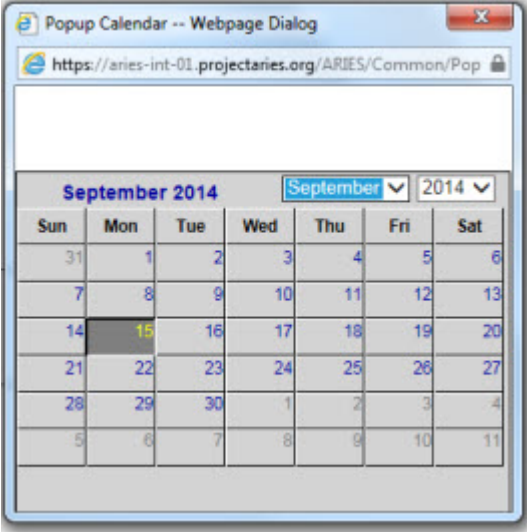


- To create a new entry, click the **New** button.
- Click the **Edit** button to change an existing record.

ER / HOSPITAL VISITS					
Date	ER Visit	Reason	Hospitalized	If hospitalized, # of days	
7/30/2010	Yes	Not HIV/AIDS Related	No	0	
4/28/2010	No	OI (HIV/AIDS)	Yes	2	 
  					

A new row appears, with the columns blank.

ER / HOSPITAL VISITS					
Date	ER Visit	Reason	Hospitalized	If hospitalized, # of days	
7/30/2010	Yes	Not HIV/AIDS Related	No	0	
4/28/2010	No	OI (HIV/AIDS)	Yes	2	
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="0"/>	 




Complete the fields as follows:

<p>Date</p>	<p>Enter the date of the emergency room or hospital visit, format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>ER Visit (checkbox)</p>	<p>Check this box if the visit was to an emergency room.</p>
<p>Reason</p>	<p>Use the dropdown to select the reason the client made the visit, e.g., HIV Related, no OI (opportunistic infection), OI (If the visit was prompted by an opportunistic infection), etc.</p> <p>Select "Other" for all other visits.</p>
<p>Hospitalized (checkbox)</p>	<p>Check this box if the client was admitted to the hospital overnight for at least one day.</p>
<p>If hospitalized, # of days</p>	<p>If hospitalized, type a number to indicate how many days.</p>
	<p>Click the Save button to save your entries and return to the Medical History Edit screen.</p>
	<p>Click the Cancel button to discard your entries and return to the Medical History Edit screen.</p>


- To edit existing ER/hospital information, click the **Edit** button to the right of the row.



ER / HOSPITAL VISITS				
Date	ER Visit	Reason	Hospitalized	If hospitalized, # of days
7/30/2010	<input checked="" type="checkbox"/>	Not HIV/AIDS Related	<input type="checkbox"/>	0
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Deactivate"/>				

Complete the fields as follows:

Date	Enter the date of the emergency room or hospital visit, format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
ER Visit (checkbox)	Check this box if the visit was to an emergency room.
Reason	Use the dropdown to select the reason the client made the visit, e.g., HIV Related, no OI (opportunistic infection), OI (If the visit was prompted by an opportunistic infection), etc. Select "Other" for all other visits.
Hospitalized (checkbox)	Check this box if the client was admitted to the hospital overnight for at least one day.
If hospitalized, # of days	If hospitalized, type a number to indicate how many days.
	Click the Save button to save your entries and return to the Medical History Edit screen.
	Click the Cancel button to discard your entries and return to the Medical History Edit screen.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is only available to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the ER/hospital information row. You will be prompted to confirm the deactivation. Once deactivated, the ER/hospital information row will no longer appear on the Medical History edit screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the ER/hospital information row.</p>

When you have completed all information on the Medical History Edit screen:

	Click this button to save your input and proceed to the ART Edit screen.
---	--

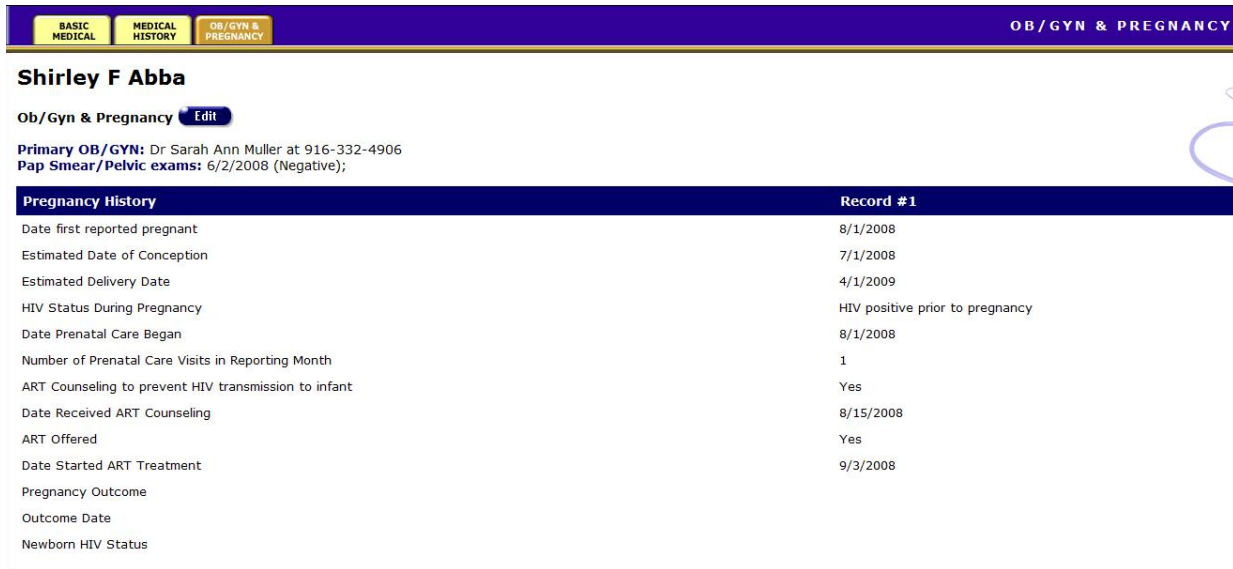
	If the client is female, you will be prompted to continue to the OB/GYN and Pregnancy Edit screen.
	Click this button to save your entries and return to the Medical History screen.
	Click the Cancel button to discard your entries and return to the Medical History screen.

2.8.5 OB/GYN and Pregnancy


ARIES maintains obstetric and gynecologic data for female clients. As HIV+ patients are at a higher risk for cervical cancer, this information can be valuable in the client's treatment. Also, pregnant HIV+ women have a high risk of passing on an infection to their unborn infants. Keeping track of this data is important should the infants require services.

To access the OB/GYN & Pregnancy screen:

- Select the Medical tab from the client's tab bar.
- Then select OB/GYN & Pregnancy from the lower tab bar.



Shirley F Abba

Ob/Gyn & Pregnancy 

Primary OB/GYN: Dr Sarah Ann Muller at 916-332-4906
Pap Smear/Pelvic exams: 6/2/2008 (Negative);

Pregnancy History	Record #1
Date first reported pregnant	8/1/2008
Estimated Date of Conception	7/1/2008
Estimated Delivery Date	4/1/2009
HIV Status During Pregnancy	HIV positive prior to pregnancy
Date Prenatal Care Began	8/1/2008
Number of Prenatal Care Visits in Reporting Month	1
ART Counseling to prevent HIV transmission to infant	Yes
Date Received ART Counseling	8/15/2008
ART Offered	Yes
Date Started ART Treatment	9/3/2008
Pregnancy Outcome	
Outcome Date	
Newborn HIV Status	

The screen lists the client's primary OB/GYN doctor and the results and dates of any pap smear tests or pelvic exams.

The pregnancy history table lists details about all known pregnancies of the client while she was infected with HIV. The table rows include:

Date first reported pregnant	The date the client first learned that she was pregnant.
Approximate Conception Date	The estimated date of conception.

Mother's HIV diagnosis	Indicates whether the mother was HIV+ before pregnancy or was infected after conception.
Prenatal Care First Sought	The date the client first accessed prenatal care.
Number of Prenatal Care Visits	The number of visits the client made for prenatal care.
ART Counseling to prevent HIV transmission to infant	Whether or not the client received antiretroviral therapy (ART) counseling regarding HIV transmission and pregnancy.
Date Counseling Offered	The date the counseling was offered.
ART Offered	Whether the client was offered antiretroviral therapy (ART).
Date Started ART Treatment	The date the client started antiretroviral therapy treatment, if applicable.
Pregnancy Outcome	The outcome of the pregnancy.
Outcome Date	The date the pregnancy ended.
Newborn HIV Status	The HIV status of the newborn.

To Change or Enter New Entries

- Click the **Edit** button.

2.8.6 OB/GYN and Pregnancy Edit

Notes:

- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.
- The RSR allows only one pregnancy to be reported on the RSR, even though a client could have multiple ARIES pregnancy records that cover some portion of the reporting period.

Use this screen to edit the client's existing Ob/Gyn and pregnancy information, or add new Ob/Gyn and pregnancy information.

Ob/Gyn & Pregnancy for GxN Y BxE

Primary Ob/Gyn **Pap Smear & Pelvic Exam Dates** **Result** **New**

Phone

Primary healthcare provider strictly an Ob/Gyn practitioner

Pregnancy History	
Date first reported pregnant	
Estimated Date of Conception	*
Estimated Delivery Date Date Calculator	*
HIV Status During Pregnancy	
Date Prenatal Care Began	*
Number of Prenatal Care Visits in Reporting Month	
ART Counseling offered to reduce HIV transmission to infant	
Date Received ART Counseling	
ART was offered to reduce vertical transmission to infant	*
Date Started ART Treatment	*
Pregnancy Outcome	*
Date of Pregnancy Outcome	*
Newborn HIV Status	

New

Save & Next >
Save & Done
Cancel

Fields marked with an asterisk (*) are required fields.

Complete the fields as follows:

Primary Ob/Gyn Section

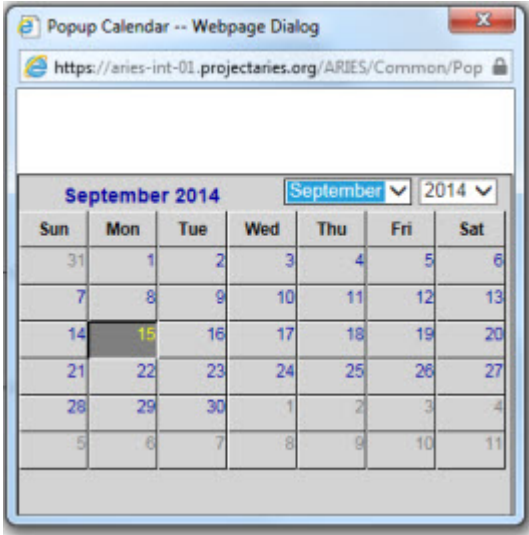


Primary OB/Gyn	Enter the name of the client's primary Ob/Gyn healthcare provider.
Phone	Enter the phone number of the client's primary Ob/Gyn healthcare provider. Format 123-456-7890. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345
Primary health care provider strictly an Ob/Gyn practitioner (checkbox)	Check this box if the provider is strictly an Ob/Gyn practitioner.

Pap Smear and Pelvic Exam Section

To enter a new pap smear and pelvic exam result, click the **New** button. A new row appears, with the columns blank.

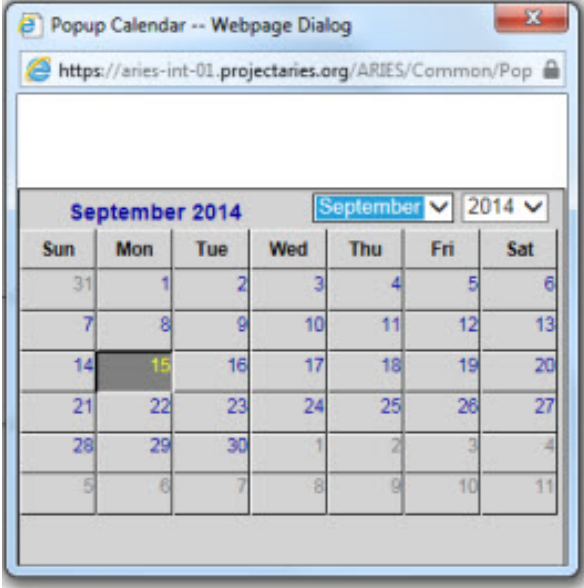



Pap Smear & Pelvic Exam Dates	Result
4/28/2010	Negative
<input type="text"/>	<input type="text"/>
Save Cancel	

Complete the fields as follows.

<p>Pap Smear & Pelvic Exam Dates</p>	<p>Enter the date the pap smear & pelvic exam test was administered. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>Result</p>	<p>Enter the result of the pap smear & pelvic exam test, e.g., negative; abnormal, HPV positive.</p>
	<p>Click the Save button to save your entries and return to the Ob/Gyn and Pregnancy Edit screen.</p>
	<p>Click the Cancel button to return to the Ob/Gyn and Pregnancy Edit screen without saving your entries.</p>

To edit information for an existing Ob/Gyn and pregnancy status, click the **Edit** button to the right of the row.

<p>Pap Smear & Pelvic Exam Dates</p>	<p>Enter the date the pap smear & pelvic exam test was administered. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>
---	--

	 <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>Result</p>	<p>Enter the result of the pap smear & pelvic exam test, e.g., negative; abnormal, HPV positive.</p>
	<p>Click the Save button to save your entries and return to the Ob/Gyn and Pregnancy Edit screen.</p>
	<p>Click the Cancel button to return to the Ob/Gyn and Pregnancy Edit screen without saving your entries.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is available only to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the pap smear & pelvic exam row. You will be prompted to confirm the deactivation. Once deactivated, the pap smear & pelvic exam row will no longer appear on the Ob/Gyn and Pregnancy screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the pap smear & pelvic exam row.</p>

Pregnancy History Section

This section of the screen lists the client's pregnancies. Each column represents one pregnancy, e.g., Record #1, Record #2.



Pregnancy History	
Date first reported pregnant	
Estimated Date of Conception	*
Estimated Delivery Date Date Calculator	*
HIV Status During Pregnancy	
Date Prenatal Care Began	*
Number of Prenatal Care Visits in Reporting Month	
ART Counseling offered to reduce HIV transmission to infant	
Date Received ART Counseling	
ART was offered to reduce vertical transmission to infant	*
Date Started ART Treatment	*
Pregnancy Outcome	*
Date of Pregnancy Outcome	*
Newborn HIV Status	

To enter a new pregnancy history, click the **New** button.




Pregnancy History	
Date first reported pregnant	<input type="text"/>
Estimated Date of Conception	* <input type="text"/>
Estimated Delivery Date Date Calculator	* <input type="text"/>
HIV Status During Pregnancy	<input type="text"/>
Date Prenatal Care Began	* <input type="text"/>
Number of Prenatal Care Visits in Reporting Month	<input type="text"/>
ART Counseling offered to reduce HIV transmission to infant	<input type="text"/>
Date Received ART Counseling	<input type="text"/>
ART was offered to reduce vertical transmission to infant	* <input type="text"/>
Date Started ART Treatment	* <input type="text"/>
Pregnancy Outcome	* <input type="text"/>
Date of Pregnancy Outcome	* <input type="text"/>
Newborn HIV Status	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Complete the fields as follows:




Date first reported pregnant	Enter the date the client first learned that she was pregnant. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
Estimated Date of Conception	Enter the estimated date of conception. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
Estimated Delivery Date	Enter the estimated delivery date. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
HIV Status During Pregnancy	Use the dropdown to indicate whether the mother was HIV+ before pregnancy or was infected after conception.
Date Prenatal Care Began	Enter the date the client first accessed prenatal care. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
Number of Prenatal Care Visits in Reporting Month	Enter the number of visits the client made for prenatal care.
ART Counseling offered to reduce HIV transmission to infant	Use the Yes/No dropdown to indicate whether the client received antiretroviral therapy (ART) counseling regarding HIV transmission and pregnancy.
Date Received ART Counseling	Enter the date the ART counseling was received. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
ART was offered to reduce vertical transmission to infant	Use the Yes/No dropdown to indicate whether the client was offered antiretroviral therapy (ART).
Date Started ART Treatment	Enter the date the client started antiretroviral therapy treatment, if applicable. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
Pregnancy Outcome	Use the dropdown to select one of the following outcomes of the pregnancy: Live birth - The infant was born. Therapeutic abortion - The client had an induced abortion. Spontaneous abortion - The client miscarried. Stillbirth - The infant was dead at birth. Unknown - The outcome is unknown.

Date of Pregnancy Outcome	Enter the date the pregnancy ended. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
Newborn HIV Status	Use the dropdown to select the HIV status of the newborn, e.g., Positive or Negative.
	Click the Save button to save your entries and return to the Ob/Gyn and Pregnancy Edit screen.
	Click the Cancel button to return to the Ob/Gyn and Pregnancy Edit screen without saving your entries.

To edit information for an existing pregnancy history, click the **Edit** button to the right of the row. Edit the fields as indicated in the section for new record entry above. After editing pregnancy history information, click on one of the following:

	Click the Save button to save your entries and return to the Ob/Gyn and Pregnancy Edit screen.
	Click the Cancel button to return to the Ob/Gyn and Pregnancy Edit screen without saving your entries.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is available only to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the pregnancy history row. You will be prompted to confirm the deactivation. Once deactivated, the pregnancy history row will no longer appear on the Ob/Gyn and Pregnancy screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the pregnancy history row.</p>

After completing all the fields on the screen, click on one of the following:

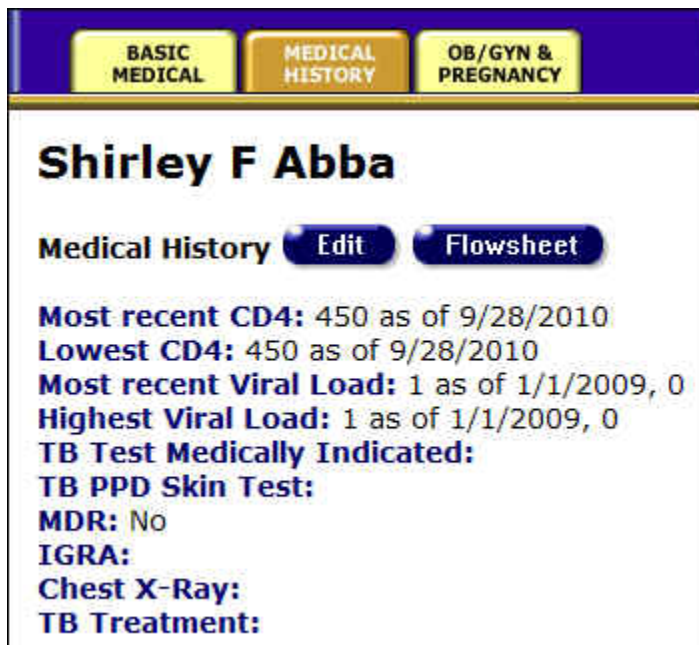
	Click this button to save your entries and proceed to the client's ART Medications Edit screen.
	Click this button to save your entries and return to the read-only Ob/Gyn and Pregnancy screen.
	Click the Cancel button to return to the read-only Ob/Gyn and Pregnancy screen without saving your entries.

2.8.7 Medical History Flowsheet

The Medical History Flowsheet is a longitudinal medical history report for a client over a specified time period. In ARIES, the user may select the medical history elements to include on the flowsheet from a list of longitudinal data maintained in ARIES. This report allows agency staff to view a client's medical history over time to evaluate the client's health progress.

To Access the Medical History Flowsheet

- From the ARIES menu bar at the top of the ARIES screen, choose the **Find > Client** menu item, which takes you to the Client Search screen.
- Search for the client for whom you want to create the flowsheet.
- After selecting the client, click the Medical tab on the top tier.
- Then click the Medical History tab on the lower tier.



- On the Medical History review screen, click the **Flowsheet** button to create a new flowsheet.

Flowsheet Setup for Shirley F Abba

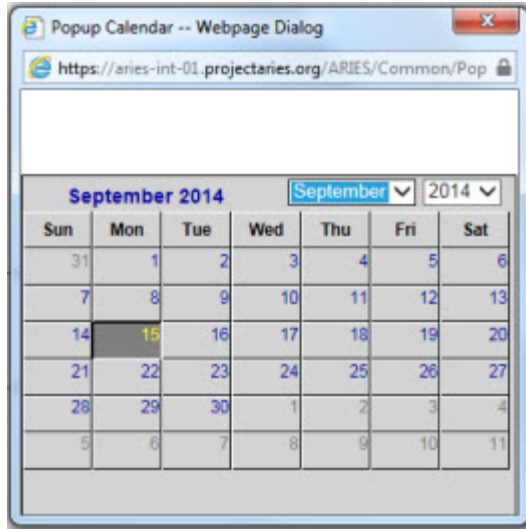
Date and

Columns

- CD4 Count
- CD4 Percent
- Viral Load Result
- Viral Load Test Type
- Acuity
- Weight
- TB Treatment/Status
- HIV Treatment Adherence
- Substance Abuse Treatment Status
- Mental Health Treatment Status
- ART Type
- AIDS Defining Condition
- STI/Hepatitis
- Immunizations
- ER/Hospital Visits
- Pap Smears

Display print format

Date	<p>Use the Date filter to report on a specific time span for the client's medical history. From the dropdown list, select the type of filter you want to perform. You can search on, before or after a date, or between two dates.</p> <p>Enter the date you wish to filter by in the first text field. Use the format MM/DD/YYYY. E.g., for January 28, 2011, enter 1/28/2011. You can also click the calendar icon to use the pop-up calendar.</p>
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Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Filters:

To filter for records **on a given date**: Select "**On**" from the dropdown list and enter a date in the first text field to filter for records on a given day. Example: If you wanted to search for all records on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for records **before a given date**: Select "**Before**" from the dropdown list to filter for records before a given day. This will sort through all entries before, but not including, a specific date. Example: If you wanted to search for all records before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for records **after a given date**: Select "**After**" from the dropdown list and enter a specific date to filter for records after a given day. Example: If you wanted to search for all records after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.




To filter for records **within a range of dates**: Select "**Between**" from the dropdown list to filter for records between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all records from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.

To filter through **all records with no date**: Select "**Is Null**" from the dropdown list to sort through all records that have no date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.

To filter through **all records with a date**: Select "**Is Not Null**" from the dropdown list to sort through all records that have a date. Leave the text fields empty.

	To search all records : Select the blank option from the dropdown and leave the text fields empty.
Medical Data checkboxes	Check each medical data elements box that you wish to include on the flowsheet.
Display print format	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.

After choosing your filters:

	<p>Click this button to display the client's Flowsheet Report.</p> <p>The Flowsheet Report displays records generated for the columns selected on the Flowsheet Setup. The first column represents the date of the medical information in ascending date order and the succeeding columns represent the medical data elements that were selected in the flowsheet setup.</p>
	<p>To export your flowsheet, click this button to display an Export Report Result screen with options for saving the data in XML, text comma-separated, or text tab-separated format.</p> <p>On the Export Report Result screen, after selecting a format, click the Download button to save the file to your computer. Then open it with your application.</p> <p>Note: If you used the Table option, there will be a separate button for each table within your report, and you must download each one separately.</p>
	Click this button to return to the Medical History subtab without saving your input.

2.9 Medications

In order to give clients proper care, it is necessary to know what medications they are taking and what has worked for them in the past. Whether provided by your agency or through other means, a full account of a client's medications is invaluable to your agency's clinicians.

Redundant prescriptions and hazardous drug interactions can be avoided with careful record keeping. Also, it is important to know how well the client responds to certain therapies and drugs and whether they adhere to the treatments prescribed to them. Example, if a doctor knows that a client frequently forgets to take medication, they will be more inclined to prescribe a once-daily protease inhibitor over a twice-daily one.

Provide as much detail as possible when you record a client's medication history.

Clicking the Medications tab brings you to the ART Medications screen, which lists all of the anti-retroviral therapy drugs the client has been prescribed.

Shirley F Abba

ART Medications [Edit](#)

Pharmacies: (1) FFACTS Pharmacy (210-358-3362) (2) (3)

Allergies:

Adherence to ART Medications: 3 day(s) as of 2/19/2009

Adherence to HIV Treatment: 80% - 95%, dated 2/19/2009

Resistance Testing Performed:

ART Therapy	Reason not on HAART	Started	Ended
Highly Active Anti-Retroviral Therapy (HAART) (Triple Therapy)		2/1/2009	
Highly Active Anti-Retroviral Therapy (HAART) (Triple Therapy)		12/16/2010	

Anti-retroviral Drugs	Prescribed by	Side Effects	Started	Ended	Dosage
Norvir (ritonavir) (d03984)	Dr. Bullock	Nausea	2/1/2009		

The top of the screen lists the following:

Pharmacies - The pharmacies used by the client.

Allergies - Any known allergies the client has.

Adherence to ART Medications - Indicates how often, over a three-day period, the client followed the prescribed ART medications. If it lists "2 day(s)," that means that the client has taken his ART drugs at the proper time and in the prescribed dosage for two of the three previous days from when they were questioned.

Adherence to HIV Treatment - Lists an estimation of how closely the client has followed the prescribed anti-retroviral therapy for the previous four weeks.

Resistance Testing Performed - Some HIV+ clients are infected by mutated strains that are resistant to certain anti-retroviral drugs. This indicates whether or not the client has received testing for HIV drug-resistance.

ART Therapy

This table lists anti-retroviral therapies the client has received and when they were prescribed.

Anti-retroviral Drugs

This table lists the HIV drugs the client has been prescribed and by which doctor. The table also lists any side effects the client experienced, when they were prescribed the drugs, and in what dosage (total milligrams per day).

To edit or add ART Medication Information:

- Click the **Edit** button, which takes you to the [ART Edit](#) screen.

2.9.1 ART Edit

Note: When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.

The ART Edit screen allows you to change and add HIV therapy and medication information for a client.

Hynam S ATestool ART ⚠

Name **Phone** **Allergies**

Pharmacy 1

Pharmacy 2

Pharmacy 3

ART TYPE

ART Type	Reason not on HAART	Start Date	End Date	
Highly Active Anti-Retroviral Therapy (HAART) (Triple Therapy)		7/1/2016		<input type="button" value="Edit"/> <input type="button" value="New"/>

ANTI-RETROVIRAL DRUGS

Anti-retroviral Drugs	Prescribed by	Side Effects	Start Date	End Date	Dosage	
Genvoya, Stribild (cobicistat/elvitegravir/emtricitabine/tenofovir) (d07899)	Kildare		7/1/2016			<input type="button" value="Edit"/>
Odefsey, Complera (emtricitabine/rilpivirine/tenofovir) (d07796)	Kildare		9/9/2014	6/30/2016		<input type="button" value="Edit"/> <input type="button" value="New"/>

Adherence

In the last three days, not including today, how many days did you take your ART medications at the times and in the amounts prescribed by your doctor?

ART Meds Adherence Date

Adherence to HIV Treatment: Percent of doses taken in the past four weeks Date

Genotypic/Phenotypic testing performed to determine resistance to HIV medications Resistance Testing Performed Date Resistance Testing Note

Pharmacy Section

Use this section to edit pharmacy information.

Dianthus S Agott ART Medications

Name **Phone** **Allergies**

Pharmacy 1

Pharmacy 2

Pharmacy 3

Enter the name and phone number of the pharmacy. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345

Add any known drug allergies in the scrollable Allergies text box.

ART Type Section

Use this section to enter ART therapies the client has received.

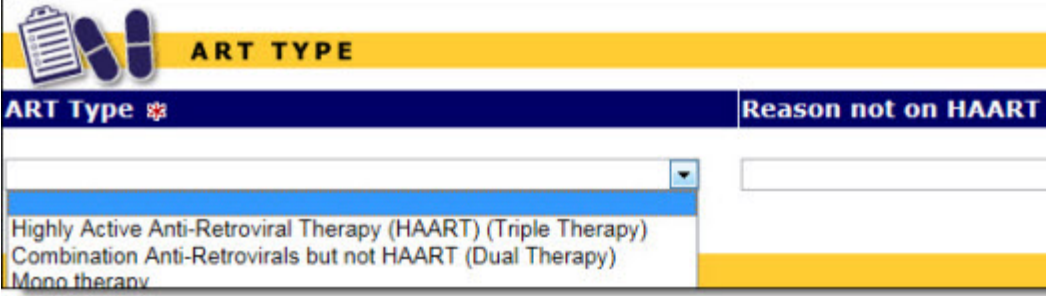
To enter new ART type information, click the **New** button. A new row appears, with the columns blank. Red asterisks beside the column names designate required fields.

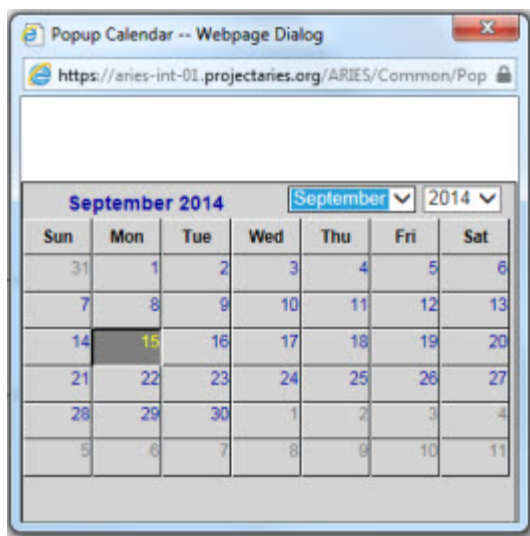
ART TYPE

ART Type *	Reason not on HAART *	Start Date *	End Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Save"/> <input type="button" value="Cancel"/>



Complete the fields as follows:

ART Type	Type a few letters of the drug to make the drug dropdown list appear. Warning: Do not enter any spaces as you type or the dropdown will disappear.
-----------------	--

	 <p>Use the dropdown to select the ART therapy the client has received or is currently receiving.</p> <p>The therapy types include:</p> <p>Highly Active Anti-Retroviral Therapy (HAART): HAART, or highly active anti-retroviral therapy, is a popular treatment of HIV involving three drug therapies: protease inhibitors and two reverse transcriptase inhibitors.</p> <p>Combination Anti-retrovirals but not HAART: Combination or dual therapy usually involving two reverse transcriptase inhibitors.</p> <p>Mono therapy: Involves a single ART drug.</p> <p>Salvage therapy: Salvage therapy is administered after other therapies have proved to be ineffective.</p> <p>None/Not applicable: The client has received no treatment.</p> <p>Unknown/Unreported: If the client doesn't know the type of therapy they have previously received or if the information is unavailable.</p> <p>Note: You must enter the date this information was collected in the Start Date field, even if the selection is None or Unknown.</p>
<p>Reason not on HAART</p>	<p>If the client is not on HAART therapy, select a reason from the dropdown list; e.g., Not medically indicated; Intolerance, Side effects, Toxicity.</p>
<p>Start date</p>	<p><u>Required Field.</u> Enter the date the therapy began. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>





For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.

End Date	Enter the date the therapy ended, if applicable. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon. The End Date must be either a date on or prior to today's date, or a blank.
After completing the fields:	
	Click the Save button to save your entries and return to the ART Medications Edit screen.
	Click the Cancel button to return to the ART Medications Edit screen without saving your entries.

To edit existing ART type information, click the **Edit** button to the right of the row. The row then appears in editable windows.

Complete the fields as indicated in the section on new record entry above.

After editing ART type information, click on one of the following:

	Click the Save button to save your entries and return to the ART Medications Edit screen.
	Click the Cancel button to return to the ART Medications Edit screen without saving your entries.

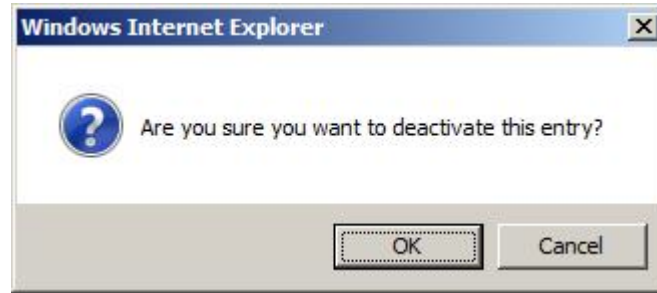
Deactivate

Note: The use of **Deactivate** has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.

This option is available only to users with the appropriate permission level.

Click the **Deactivate** button to deactivate the ART type row.

Note: You will be prompted to confirm the deactivation:



To confirm the deactivation, click **OK**. You will be returned to the ART Medications Edit screen.

Once deactivated, the ART type row will no longer appear on the ART Medications screen.

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the ART type row.

Anti-Retroviral Drugs Section

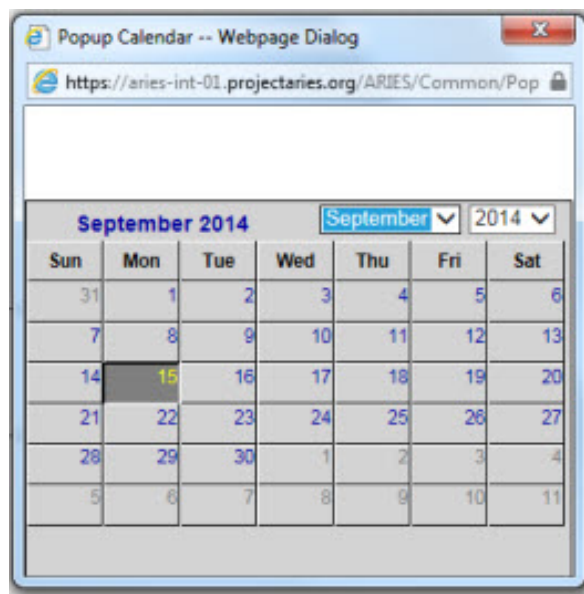
With each ART Type, the client will have taken or is taking anti-retroviral drugs. Use the Anti-Retroviral Drugs table to enter these and any other ART medications prescribed to the client. Click the **New** button to add new information.

ANTI-RETROVIRAL DRUGS					
Anti-retroviral Drugs	Prescribed by	Side Effects	Start Date	End Date	Dosage
Kaletra (lopinavir-ritonavir) (d04717)	Dr. Miller	Headache	5/1/2010		400 mg/100 mg
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



Complete the fields as follows:

Anti-RetroviralDrugs	Use the dropdown to select the drug prescribed. The medications are listed alphabetically by their brand name next to their generic drug name and the HRSA drug code.
Prescribed by	Enter the name of the physician who prescribed the drug.
Side Effects	Enter any side effects the client may have experienced from taking the drug.
Start Date	<u>Required Field</u> . Enter the date the drug therapy began. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.

Note: A future start date is not allowed. If entered, a future date will result in an error message.



For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.




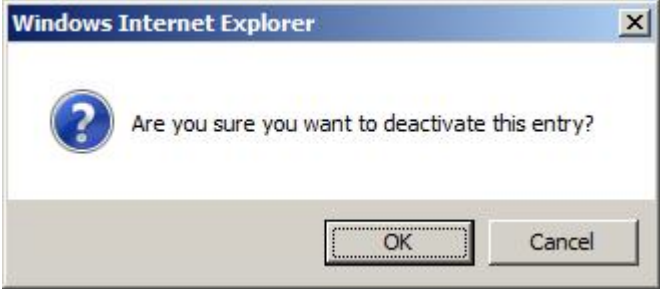
<p>End Date</p>	<p>Enter the date the drug therapy ended, if applicable. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon. The End Date must be either a date on or prior to today's date, or a blank.</p> <p>If the client is still currently taking the medication, enter the final date of the prescription in the End Date text field.</p> <p>If this information cannot be validated, leave this field empty.</p>
<p>Dosage</p>	<p>Enter the total daily dosage in milligrams for the drug. Example: If a client is prescribed 300 mg of Ziagen twice-daily, enter "600" under dosage.</p>
<p>After completing the fields:</p>	
<p></p>	<p>Click the Save button to save your entries and return to the ART Medications Edit screen.</p>
<p></p>	<p>Click the Cancel button to return to the ART Medications Edit screen without saving your entries.</p>

To edit existing anti-retroviral drug information, click the **Edit** button to the right of the row.

ANTI-RETROVIRAL DRUGS						
Anti-retroviral Drugs	Prescribed by	Side Effects	Start Date	End Date	Dosage	
Kaletra (lopinavir-ritonavir) (d04717)	Dr. Miller	Headache	5/1/2010		400 mg/100 mg	<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Deactivate"/>

Edit the fields as indicated in the section for new record entry above.

After editing anti-retroviral drug information, click on one of the following:

	Click the Save button to save your entries and return to the ART Medications Edit screen.
	Click the Cancel button to return to the ART Medications Edit screen without saving your entries.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is available only to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the ART Medications history row.</p> <p>Note: You will be prompted to confirm the deactivation:</p> <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;">  </div> <p>To confirm the deactivation, click OK. You will be returned to the ART Medications Edit screen.</p> <p>Once deactivated, the ART type row will no longer appear on the ART Medications screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the ART Medications history row.</p>

Adherence Section

One challenge in HIV treatment is therapy compliance. Advanced HIV patients often have memory problems and they forget to take their medications, or an HIV patient might be a substance abuser, which can affect compliance. Understanding how well a client adheres to their ART therapy helps clinicians treat them effectively. Use this section to document the patient's therapy compliance.

Adherence

In the last three days, not including today, how many days did you take your ART medications at the times and in the amounts prescribed by your doctor? as of

Adherence to HIV Treatment: **Percent of doses taken in the past four weeks** **Date** **New**

Genotypic/Phenotypic testing performed to determine resistance to HIV medications Date of Test: Notes

Save + Next Save + Done Cancel

Complete the Adherence section fields as follows:

Days ART medications taken ("In the last three days...?")	<p>Ask the client how many days over the previous three days (not including today) they took their ART medication at the proper time and in the proper dosage as prescribed by their doctor.</p> <p>Use the dropdown to select how many days the client was in compliance. Example: If the client took their medications for two days, but forgot to take their morning medications on the third day, select "2" from the dropdown.</p> <p>If the client is not currently taking ART medication, select the blank option.</p>
as of	<p>Enter the date you asked the above question. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>


Adherence to HIV Treatment Section

To enter new HIV treatment information, click the **New** button. A new row appears, with the columns blank.




Adherence to HIV Treatment: **Percent of doses taken in the past four weeks** **Date** **Save**
Cancel

Complete the fields as follows:

Percentage of doses taken in the past four weeks	<p>Ask the client to estimate how closely they adhered to their HIV treatment for the previous four weeks, using a percentage.</p> <p>Use the dropdown to select the percentage.</p> <p>If the client cannot remember, select "Unknown."</p>
Date	<p>Enter the date you asked the above question. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>
After completing the fields:	
Save	<p>Click the Save button to save your entries and return to the ART Medications Edit screen.</p>




	Click the Cancel button to return to the ART Medications Edit screen without saving your entries.
---	--

To edit existing adherence information, click the **Edit** button to the right of the row.

Adherence to HIV Treatment:	Percent of doses taken in the past four weeks	Date	
	80% - 95%	9/7/2010 	
			

Complete the fields as indicated in the section on new record entry above.

After editing adherence information, click on one of the following:

	Click the Save button to save your entries and return to the ART Medications Edit screen.
	Click the Cancel button to return to the ART Medications Edit screen without saving your entries.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is available only to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the adherence row. You will be prompted to confirm the deactivation. Once deactivated, the adherence row will no longer appear on the ART Medications screen.</p> <p>Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the adherence row.</p>




Genotypic/Phenotypic Testing Section

Genotypic/phenotypic HIV drug resistance testing is performed to gauge whether a patient has an HIV virus strain that is resistant to certain drugs. Knowing what drugs are ineffective for a client helps clinicians outline a proper course of action.

Genotypic/Phenotypic testing performed to determine resistance to HIV medications	<input type="text"/>	Date of Test:	<input type="text"/>		Notes	<input type="text"/>
--	----------------------	----------------------	----------------------	---	-------	----------------------

Complete the fields as follows:

...resistance to HIV medications	Use the Yes/No dropdown to indicate whether a client has received genotypic/phenotypic drug resistance testing. If it is unknown whether the client has received genotypic/phenotypic drug resistance testing, select "Unknown."
---	---

Date of Test	Enter the date of the genotypic/phenotypic drug resistance testing. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
Notes	In the scrollable Notes text field, enter the type of genotypic/phenotypic test and any known results of the test.
After completing all fields:	
	Click this button to save your entries and proceed to the client's Other Medications Edit screen.
	Click this button to save your entries and return to the read-only ART Medications screen.
	Click the Cancel button to return to the read-only ART Medications screen without saving your entries.

2.9.2 Other Medications

The Other Medications screen lists non-ART prescribed medications. Persons with HIV often experience health complications and symptoms that are treated with non-ART (anti-retroviral therapy) medications. For example, anti-inflammatories are prescribed for joint pain and sleeping aids are often prescribed for insomnia. Also, a client may be taking medications for conditions completely unrelated to their HIV status.

It is important to know all medications the client is taking as some drugs can interact with and hinder the effects of HIV medications.

To access this screen from the Client Detail screen:

- Click the Medications tab from the top row of tabs.
- Then click the Other Medications tab from the second row of tabs.

The screen is organized as a table with columns for the name of the medication, the prescriber, the condition for which it was prescribed, the type of medication, the dates the client took the medication, and in what dosage. At the bottom of the screen is a prescription adherence question.

To change or add medication information, click the **Edit** button, which takes you to the [Other Medications Edit](#) screen.



The screen is organized as a table with columns for the name of the medication, the prescriber, the condition for which it was prescribed, the type of medication, the dates the

client took the medication, and in what dosage. At the bottom of the screen is a prescription adherence question.

2.9.3 Other Medications Edit

Notes

- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "Check the client's CDC Disease Status." ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

Bleak B Hauseman Other Medications

Other Medications *	Prescribed by	Used for *	Type *	Start * / End	Dosage
<p>Adherence</p> <p>In the last three days, not including today, how many days did you take your other medications at the times and in the amounts prescribed by your doctor? <input checked="" type="checkbox"/> Other Meds Adherence Date <input type="text"/></p> <p style="text-align: right;"> <input type="button" value="Save - Next"/> <input type="button" value="Save - Done"/> <input type="button" value="Cancel"/> </p>					

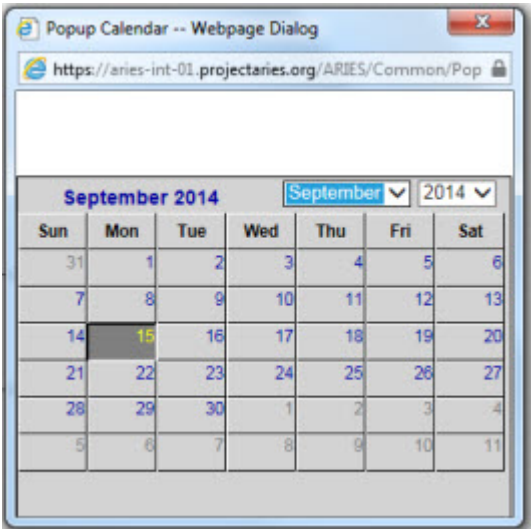
The Edit Other Medications screen lists the client's non-ART medications. To change details of a listed medication, click the **Edit** button next to that line item. To add a new medication, click the **New** button.

Rowena T Wilbur Other Medications

Other Medications *	Prescribed by	Used for *	Type *	Start/End Date *	Dosage
Amikacin Sulfate (amikacin) (d00087)	Dr. D. Rosario	Antibacterial Prophylaxis		11/28/2009 - 12/9/2009	1500
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Check if Other Drug <input type="button" value="Save"/> <input type="button" value="Cancel"/> 					
<p>Adherence</p> <p>In the last three days, not including today, how many days did you take your other medications at the times and in the amounts prescribed by your doctor? <input type="text"/> as of <input type="text"/></p>					




Complete the windows in all columns with new or updated information.

Other Medications	In the blank window, type the first few letters of the medication's name. A listbox will appear from which you may select the medication.
--------------------------	---

	<div data-bbox="406 199 1421 798" style="border: 1px solid black; padding: 5px;"> <p>dr *</p> <p>AccuHist DM Pediatric Drops (brompheniramine/dextromethorphan/PSE) (d03368) AccuHist Drops (brompheniramine-pseudoephedrine) (d03301) Andecon Pediatric Drops (chlorpheniramine/PE/PPA/phenyltoloxamine) (d03310) Angeliq (drospirenone-estradiol) (d05530) Black Draught (senna) (d01013) Comtrex Non Drowsy Liquigel (APAP/dextromethorphan/phenylpropanolamine) (d04167) Dri-Ear (boric acid otic) (d03988) Dristan (pheniramine-phenylephrine nasal) (d03271)</p> </div> <p>Do not type spaces or the listbox will disappear.</p>
Prescribed by	Enter the name of the prescribing physician.
Used for	Enter the reason the medication was given.
Type	From the dropdown, select the type of medication (prophylaxis or treatment).
Start/End Date	<p>In these fields, enter the dates the medication was begun and ended. Use the format MM/DD/YYYY. You can also use the pop-up calendar by clicking the calendar icon.</p> 

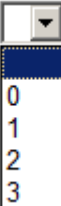
	<p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the text field. The calendar window automatically closes.</p> <p>If the client is still taking the medication, enter the last date of the prescription. For example, if the client is 7 days into a 14-day course of Amoxicillin, enter the date 7 days from now in the Ended text field. If the date can't be validated, leave this field empty. Please note that both Start and End dates may be in the future.</p>
Dosage	<p>Enter the daily amount in milligrams of the medication. For example, if the client is taking 500 mg of Amikacin Sulfate three times daily, enter 1500.</p>

When you have finished editing the medication information:

	<p>Click the Save button to store your changes to ARIES and return to the Other Medications Edit screen, where your new entries are now displayed.</p>
	<p>Click Cancel to return to the Other Medications Edit screen without saving changes.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click Deactivate to remove a medication from view.</p>



Adherence Section

After entering the client's non-ART medications, ask the client how many days over the previous three days (not including today) they took their non-ART medication at the proper time and in the proper dosage as prescribed by their doctor.

(Adherence dropdown)	<p>Back on Other Medications Edit, use the dropdown list next to the Adherence question to select how many days they were in compliance.</p>  <p>Examples: If the client took their medications for two days, but forgot to take their morning medications on the third day, select "2" from the dropdown list. If the client is not currently taking medication, select the blank option.</p>
as of	<p>Enter the date you asked the question in the text field next to "as of." Use the following format: MM/DD/YYYY. Or you may click on the calendar icon to use the calendar pop-up.</p>

When you have finished entering the client's medications information:

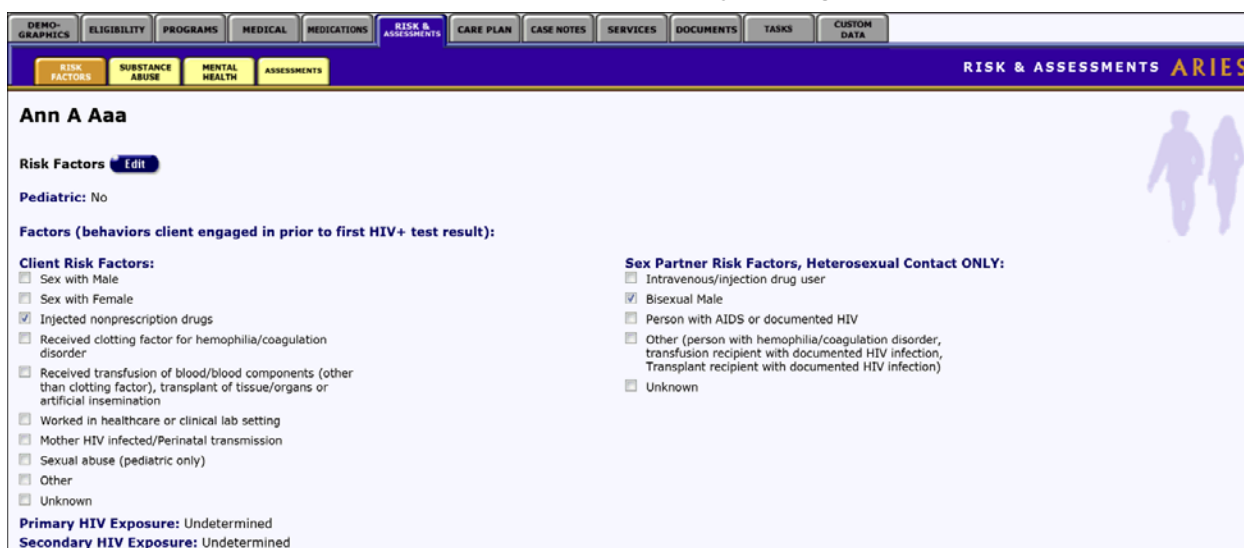
	<p>Click the Save + Next button to advance to the client's Risk Factors Edit screen.</p>
---	---

	Click Save + Done to store your new entries and return to the Other Medications screen, where your updates are now displayed.
	Click Cancel to return to the Other Medications screen without saving any changes.

2.10 Risk and Assessments

The Risk & Assessments screen catalogs the client's HIV-related behaviors, their substance abuse history, and their mental health history. On the Assessments tab, tools are available to monitor psychosocial factors, the client's function status, behavioral risks and potential barriers that may keep a client from receiving the medical care they need. This information is helpful in servicing the client and in understanding HIV epidemiology.

Clinicians can use this information to help counsel clients and advise them to help prevent further infection. Researchers collect aggregate risk factor data to analyze behavior patterns. Also, based on their risk factors, clients may be eligible for certain services.



The top left of the screen indicates whether or not the client is a pediatric case, i.e., if the client is under 13 years of age.

Factors

On the left is a checklist listing the high-risk behaviors the client engaged in before they received their first positive HIV test result. These behaviors may or may not have contributed to the client's HIV infection. A checkmark appears next to each selected factor.

Sex Partner Risk Factors, Heterosexual Contact Only

On the right is a checklist regarding the risk factors of the client's heterosexual partners before the client's first positive HIV test result. Note that Heterosexual Contact is a risk factor only if the client's heterosexual partner was known to be at-risk or infected.

Primary HIV Exposure lists the client's known contact to HIV infection before their first positive HIV test result. For example, if the client was a heroin user who shared needles with HIV+ persons, "intravenous drug user" will be listed as their primary contact.

Secondary HIV Exposure lists any other known exposure to HIV infection beyond their primary HIV exposure.

To change or edit a client's risk factors:

- Click the **Edit** button, which takes you to the [Risk Factors Edit](#) screen.

2.10.1 Risk Factors Edit

Notes:

- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

Use this screen to record the client's risk factors and high risk behaviors.

Dianthus S Agott Risk Factor

Pediatric

*** What behaviors did the client engage in prior to his/her first HIV positive test result? Check all that apply:**

Client Risk Factors

- Sex with Male
- Sex with Female
- Injected nonprescription drugs
- Received clotting factor for hemophilia/coagulation disorder
- Received transfusion of blood/blood components (other than clotting factor), transplant of tissue/organs or artificial insemination
- Worked in healthcare or clinical lab setting
- Mother HIV infected/Perinatal transmission
- Sexual abuse (pediatric only)
- Other
- Unknown

Sex Partner Risk Factors, Heterosexual Contact ONLY

- Intravenous/injection drug user
- Bisexual Male
- Person with AIDS or documented HIV
- Other (person with hemophilia/coagulation disorder, transfusion recipient with documented HIV infection, Transplant recipient with documented HIV infection)
- Unknown

Primary HIV Exposure

Secondary HIV Exposure

Top Right Section of Screen

At the top of many screens, a small yellow triangle appears:



This is a Client Alert symbol. Hover your mouse over it to view a message about the client. The display will also include the name of the user who entered or edited the message and

the date of entry. The user's name and the entry date are updated when the alert is entered or updated.

Top Left Section of Screen

Pediatric checkbox	Check this box if the client is under 13 years of age.
---------------------------	--

Client Risk Factors Section

Check all of the boxes that apply to the behaviors that the client engaged in prior to his/her first HIV positive test result. Select all the behaviors that apply, not just those the client suspects exposed them to HIV infection.

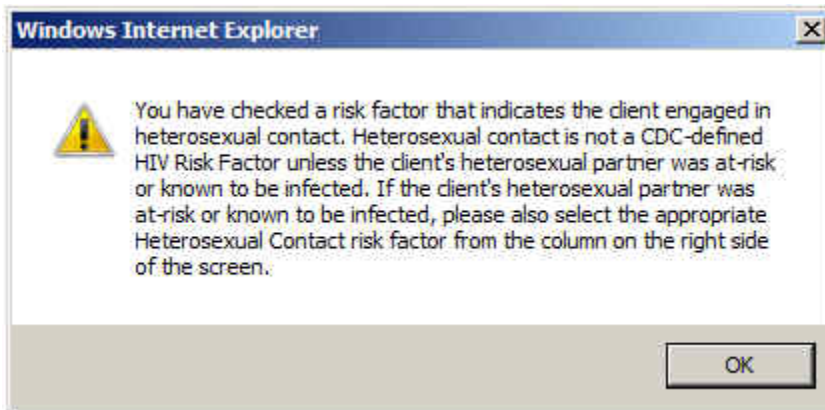
Sex with Male	If the client had sex with men, whether or not their sexual partner was known to be HIV+.
Sex with Female	If the client had sex with women, whether or not their sexual partner was known to be HIV+.
Injected nonprescription drugs	Check this box if the client used drugs delivered by needle. Example: If the client injected heroin or methamphetamine.
Received clotting factor for hemophilia/ coagulation disorder	Check this box if the client had or has a coagulation disorder like hemophilia and received clotting factor. HIV can be carried in infected blood products.
Received transfusion of blood/blood components (other than clotting factor), transplant of tissue/organs or artificial insemination	Check this box if the client has received any such item (excluding clotting factor). HIV can be transmitted in infected blood products, organs, or any bodily fluid, including semen.
Worked in healthcare or clinical lab setting	Check this box if the client worked in this type of environment. Those who work in laboratories or in healthcare facilities can be at greater risk of HIV exposure.
Mother HIV infected/Perinatal transmission	This check box should only be selected if the client was 13 years of age or younger at the time of exposure. HIV+ mothers can potentially infect their unborn child during pregnancy. If the client's mother was known to be HIV+ while pregnant with the client, select this check box.
Sexual abuse (pediatric only)	This check box should only be selected if the client was 13 years of age or younger at the time of exposure. Check this box if the client was a victim of sexual abuse.

Other	Check this box if the client engaged in other behaviors considered to be a high risk for HIV exposure.
Unknown	Check this box if the client's risk behavior is unavailable.

Sex Partner Risk Factors, Heterosexual Contact Only Section

Check all of the boxes that apply to the client's heterosexual partners before the client's first positive HIV test result. Select all the behaviors that apply, not just those the client suspects exposed them to HIV infection.

Note that Heterosexual Contact is a risk factor only if the client's heterosexual partner was known to be at-risk or infected. Make appropriate entries in the Heterosexual Contact Only column if you are prompted with the following message resulting from an entry in the left-hand column:



Intravenous/injection drug user	Check this box if the client's partner used drugs delivered by needle. Example: If the client injected heroin or methamphetamine.
Bisexual Male	Check this box if the client's sexual partner was a male who engaged in homosexual and heterosexual sex.
Person with AIDS or documented HIV	Check this box if the client's sexual partner had AIDS or had ever tested positive for HIV.
Other (person with hemophilia/coagulation disorder, transfusion recipient with documented HIV infection, Transplant recipient with documented HIV infection)	Check this box if the client's partner had received any blood products, tissue, or organs known to have been infected by HIV.




Unknown	Check this box if the client's partner's HIV risk factors were unavailable.
----------------	---

HIV Exposure Section

Complete the fields as follows:

Primary HIV Exposure	<p>Use the dropdown to select the client's risk behavior that was their primary known contact to HIV infection before their first positive HIV test result.</p> <p>Example: If the client was a heroin user who shared needles with known HIV+ persons, select "Injection drug user" as their primary contact.</p> <p>If the client's primary exposure to HIV was from a factor or behavior not listed, select "Other."</p> <p>If the client engaged in multiple high risk behaviors where they know they were exposed to HIV, but they don't know which factor was their primary HIV exposure, select "Undetermined."</p> <p>If the client engaged in high risk behaviors, but does not know how they were infected, select "Unknown."</p> <p>If the client does not list any risk factors, select, "Risk not reported."</p>
Secondary HIV Exposure	<p>Use the dropdown to select any additional risk factors that may have exposed the client to HIV. Example: If the client has determined that their primary exposure to HIV was from heterosexual sex, but also believes they were exposed to HIV from intravenous drug use, select "Injection drug user."</p> <p>If the client had no known secondary HIV exposure, leave this selection blank.</p>

After completing the screen fields:

	Click this button to save your input and proceed to the Substance Abuse Edit screen.
	Click this button to save your input and return to the Risk Factors Edit screen.
	Click the Cancel button to return to the Risk Factors Edit screen without saving your input.

2.10.2 Substance Abuse

The Substance Abuse screen displays the client's treatment status, but, for privacy reasons, it does not list the client's history with drug and alcohol abuse.

To access a client's Substance Abuse screen, from their information page:

- Click the Risk & Assessments tab from the top tier of tabs.
- From the second tier of tabs, select the Substance Abuse tab.

Date	Screening Tool	Outcome
1/14/2010	Common Screening Tool	No substance abuse indicated.

To edit a client's substance abuse information:

- Click the **Edit** button to access the [Substance Abuse Edit](#) screen.

2.10.3 Substance Abuse Edit

Use the Substance Abuse Edit screen to update the client's existing substance abuse information, or to enter new substance abuse information.

Notes

- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

Update the client's substance abuse treatment status on this form.

Screen Date *	Screening Tool	Outcome

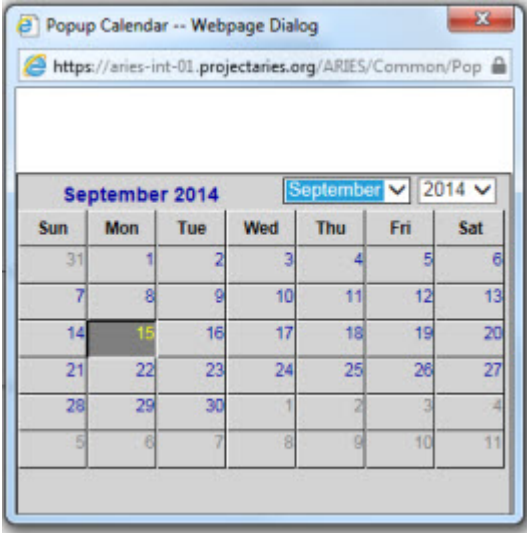

ARIES maintains a history of the client's treatment status. A new Treatment Status entry should be made whenever the client's status changes.


Treatment Status Section

- To enter the client's new substance abuse treatment status and the date, click the **New** button. A new row appears, with the Treatment Status and Date columns blank.
- To edit information for an existing status, click **Edit**. The row for the status date changes to a dropdown. Select a new status from the drop-down and click **Save**.

The screenshot shows a form with two main sections: 'Treatment Status' and 'Date'. The 'Treatment Status' section has a dropdown menu. The 'Date' section has a text input field followed by a calendar icon. To the right of these fields are two buttons: a yellow 'Save' button and a blue 'Cancel' button.


Complete the fields as follows:

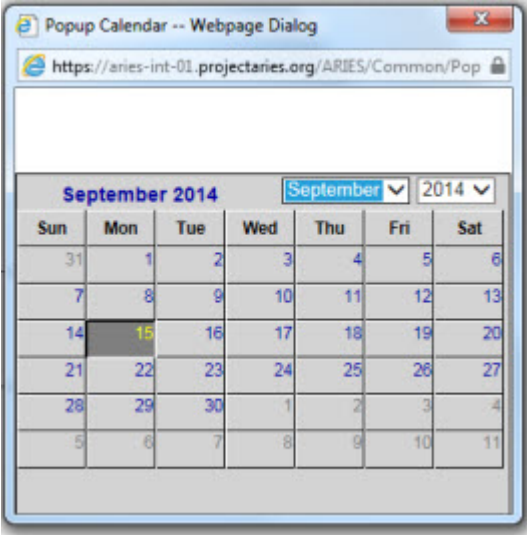


<p>Treatment Status</p>	<p>Use the dropdown to select the client's substance abuse treatment status. Example: If the client was in a rehab facility but did not complete the program, select "Dropped out of treatment." If the client received treatment not listed, select "Other."</p>
<p>Date</p>	<p>Enter the effective date of the status. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
	<p>Click the Save button to save your input and return to the Substance Abuse screen.</p>


	Click the Cancel button to return to the Substance Abuse screen without saving your input.
---	---

- To edit information for an existing status, click the **Edit** button.




Paula F Bevins Substance Abuse

Treatment Status	Date	
<input style="width: 90%;" type="text" value="Completed treatment"/>	<input style="width: 80%;" type="text" value="6/9/2010"/> 	<div style="display: flex; flex-direction: column; gap: 5px;"> <div style="background-color: #FFD700; border: 1px solid black; border-radius: 5px; padding: 2px 10px; text-align: center;">Save</div> <div style="background-color: #002060; color: white; border: 1px solid black; border-radius: 5px; padding: 2px 10px; text-align: center;">Cancel</div> <div style="background-color: #FF0000; color: white; border: 1px solid black; border-radius: 5px; padding: 2px 10px; text-align: center;">Deactivate</div> </div>

Treatment Status	Use the dropdown to select the client's substance abuse treatment status. Example: If the client has successfully completed a treatment program, select "Completed treatment." If the client received treatment not listed, select "Other."
Date	Enter the effective date of the status. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.  For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.
	Click the Save button to save your input and return to the Substance Abuse Edit screen, where your new entries will be displayed.
	Click the Cancel button to discard your entries and return to the Substance Abuse Edit screen.

	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is available only to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the treatment status row. Once deactivated, the row will no longer appear on the Substance Abuse screen.</p> <p>Clicking the Deactivate button does not deactivate the client with ARIES; it only deactivates the treatment status row.</p>
---	--



When you click **Save** or **Cancel**, the Substance Abuse Edit screen displays the following three buttons at the bottom:

	Click this button to save your entries and advance to the Mental Health Edit screen.
	Click this button to save your entries and return to the read-only Substance Abuse screen.
	Click this button to discard your entries and return to the read-only Substance Abuse screen.

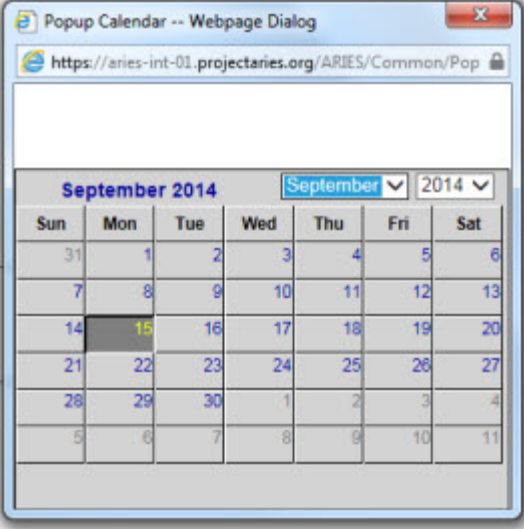


Screening Section

- To enter new substance abuse screening information, click the **New** button. A new row appears with blank fields.




Screen Date 📅	Screening Tool	Outcome
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

<p>Screen Date</p>	<p>Enter the date of the screening. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>
---------------------------	--

	 <p>For each field, use the drop-down lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
Screening Tool	Type the name of the tool used for screening.
Outcome	Type the outcome of the screening, such as Positive or Negative.
	Click this button to save the row of entries and return to the Substance Abuse Edit screen, where your new entries will be displayed.
	Click this button to discard the row of entries and return to the Substance Abuse Edit screen.

When you click **Save** or **Cancel**, the Substance Abuse Edit screen displays the following three buttons at the bottom:

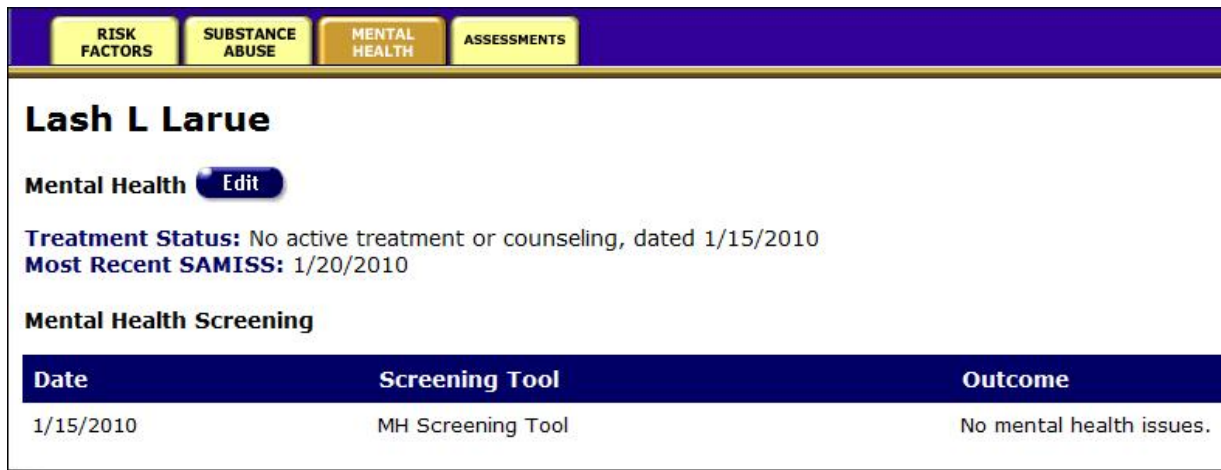
	Click this button to save your entries and advance to the Mental Health Edit screen.
	Click this button to save your entries and return to the read-only Substance Abuse screen.
	Click this button to discard any entries and return to the read-only Substance Abuse screen.

2.10.4 Mental Health

The Mental Health screen displays the client's mental health treatment status, but, for privacy, it does not display the mental health history.

To access a client's Mental Health screen:

- Click the Risk & Assessments tab from the top tier of tabs.
- From the second tier of tabs, select the Mental Health tab.



RISK FACTORS **SUBSTANCE ABUSE** **MENTAL HEALTH** **ASSESSMENTS**

Lash L Larue

Mental Health **Edit**

Treatment Status: No active treatment or counseling, dated 1/15/2010
Most Recent SAMISS: 1/20/2010

Mental Health Screening

Date	Screening Tool	Outcome
1/15/2010	MH Screening Tool	No mental health issues.

Treatment Status - Indicates whether or not the client received treatment for a mental illness.

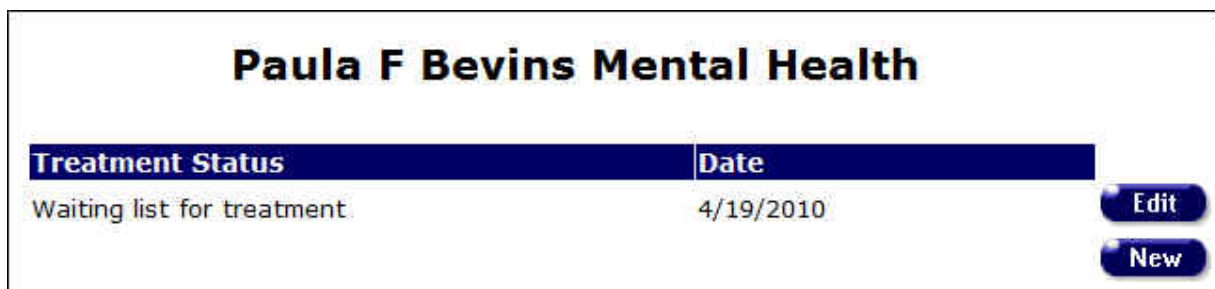
Mental Health Screening - Indicates the date, tool and outcome of mental health screening.

To change a client's mental health status record:

- Click the **Edit** button, which takes you to the [Mental Health Edit](#) screen.

2.10.5 Mental Health Edit

Note: When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.



Paula F Bevins Mental Health

Treatment Status	Date
Waiting list for treatment.	4/19/2010

Edit
New

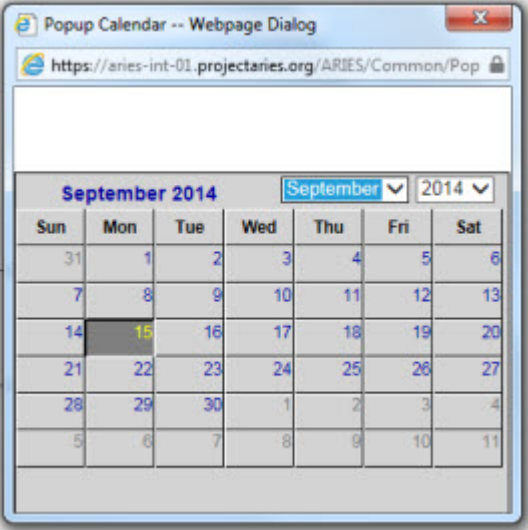


In the top of this screen, update the client's mental health status. Click **Edit** to update an existing status or **New** to add the current status.

Treatment Status

- To enter a new mental health treatment status for the client, click the **New** button. A new row appears, with the Treatment Status and Date columns blank.

Paula F Bevins Mental Health




Treatment Status	Date
Waiting list for treatment	4/19/2010
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>

Treatment Status	<p>Use the dropdown to select the client's mental health treatment status.</p> <p>If the client's status is not listed, select "Other."</p>
Date	<p>Enter the effective date of the status. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <div style="text-align: center; margin: 10px 0;">  </div> <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
	<p>Click the Save button to save your input and return to the Mental Health Edit screen.</p>
	<p>Click the Cancel button to return to the Mental Health Edit screen without saving your input.</p>

- To edit information for an existing status, click the **Edit** button. The information in the status row appears in editable windows.

Paula F Bevins Mental Health



Treatment Status	Date
<input style="width: 95%; border: 1px solid #ccc;" type="text" value="Waiting list for treatment"/>	<input style="width: 80%; border: 1px solid #ccc;" type="text" value="4/19/2010"/> <input style="width: 15px; height: 15px; border: 1px solid #ccc;" type="button" value="Calendar"/>

Treatment Status	Use the dropdown to select the client's mental health treatment status. If the client's treatment status is not listed, select "Other."
Date	Enter the effective date of the status. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon. For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.
	Click the Save button to save your input and return to the Mental Health Edit screen, where your updates will be displayed.
	Click the Cancel button to discard your entries and return to the Mental Health Edit screen.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is available only to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the treatment status row. Once deactivated, the row will no longer appear on the Mental Health screen.</p> <p>Clicking the Deactivate button does not deactivate the client with ARIES; it only deactivates the treatment status row.</p>




Screening Section

- To enter new mental health screening information, click the **New** button. A new row appears with blank fields.

Screen Date	Screening Tool	Outcome
<input style="width: 95%; border: 1px solid #ccc;" type="text"/> <input style="width: 15px; height: 15px; border: 1px solid #ccc;" type="button" value="Calendar"/>	<input style="width: 95%; border: 1px solid #ccc;" type="text"/>	<input style="width: 95%; border: 1px solid #ccc;" type="text"/>

Screen Date	Enter the date of the screening. Format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon. For each field, use the drop-down lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.
Screening Tool	Type the name of the tool used for screening.
Outcome	Type the outcome of the screening.
	Click this button to save the row of entries and return to the Mental Health Edit screen, where your new entries will be displayed.
	Click this button to discard the row of entries and return to the Mental Health Edit screen.

When you click **Save** or **Cancel**, the Mental Health Edit screen displays the following three buttons at the bottom:

	Click this button to save your entries and advance to the Mental Health Edit screen.
	Click this button to save your entries and return to the read-only Mental Health screen.
	Click this button to discard any entries and return to the read-only Mental Health screen.

2.10.6 Assessments

When a client is first registered at an agency, a baseline assessment of psychosocial status can be conducted. The Psychosocial Factors evaluation consists of three screens: History of Abuse, Legal, and Diagnostic Impression and Mental Health History.

Use this screen to enter the client assessments. When performing an evaluation, attention to detail is critical.

To access the Assessments screen:

- Click the Risk & Assessments tab from the top tier of tabs.
- From the second tier of tabs, select the Assessments tab.

RISK FACTORS	SUBSTANCE ABUSE	MENTAL HEALTH	ASSESSMENTS
Rex D Almondry			
Psychosocial Factors Edit			
Functional Status			
Date	Staff	New	
Behavioral Risk			
Date	Staff	New	
Barriers to Care			
Date	Staff	New	
Substance Abuse and Mental Illness Symptom Screener (SAMISS)			
Date	Staff	Refer to Substance Abuse Treatment	Refer to Mental Health Counseling
3/1/2010	Admin_System	No	Unknown
			Edit
			New
Risk Reduction Screening			
Date	Screening Tool	Outcome	New

To enter a new assessment, edit an existing assessment, or view a client's baseline assessment:

- Click the **Edit** button to the right of Psychosocial Factors, which takes you to the [Psychosocial Factors: History of Abuse Edit](#) screen.

2.10.6.1 Psychosocial Factors

Note: When you enter a new client a red message appears next to the client's name on the screen. This message reads, "Check the client's CDC Disease Status." ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.

View help for [Psychosocial Factors: History of Abuse](#)

View help for [Psychosocial Factors: Legal](#)

View help for [Psychosocial Factors: Diagnostic Impression and Mental Health History](#)

Psychosocial Factors: History of Abuse

Use this screen to record the client's history of abuse.

Lash L Larue Psychosocial Factors: History of Abuse

	Childhood (<17)	Adult (>=17)
Emotional	Yes ▾	No ▾
Physical	Unknown ▾	No ▾
Sexual	No ▾	No ▾
Domestic Violence Observed in Childhood	Yes ▾	
Domestic Violence Adult Perpetrator	No ▾	

Save + Next ▶
Cancel

Complete the Childhood (under 17 years of age) fields as follows:



Emotional	Use the Yes/No dropdown to indicate whether the client was the victim of emotional abuse. If the information is unavailable, select "Unknown."
Physical	Use the Yes/No dropdown to indicate whether the client was the victim of physical abuse. If the information is unavailable, select "Unknown."
Sexual	Use the Yes/No dropdown to indicate whether the client was the victim of sexual abuse. If the information is unavailable, select "Unknown."
Domestic Violence Observed in Childhood	Use the Yes/No dropdown to indicate whether the client observed domestic violence in childhood. If the information is unavailable, select "Unknown."
Domestic Violence Adult Perpetrator	Use the Yes/No dropdown to indicate whether the client as an adult (17 and older) has committed any acts of violence on others in their household. If the information is unavailable, select "Unknown."

Complete the Adult (17 years and older) fields as follows:

Emotional	Use the Yes/No dropdown to indicate whether the client was the victim of emotional abuse. If the information is unavailable, select "Unknown."
Physical	Use the Yes/No dropdown to indicate whether the client was the victim of physical abuse. If the information is unavailable, select "Unknown."

Sexual	Use the Yes/No dropdown to indicate whether the client was the victim of sexual abuse. If the information is unavailable, select "Unknown."
---------------	--

After entering a new assessment, or editing an existing assessment, click on one of the following:

	Click the Save + Next button to save your input and proceed to the Psychosocial Factors: Legal edit screen.
	Click the Cancel button to return to the Assessments screen without saving your input.

Psychosocial Factors: Legal

Use this screen to record the client's pending legal issues.



Dianthus S Agott Psychosocial Factors: Legal

Does the client have legal issues pending in any of the following areas?

Divorce, Child Support or Custody <input type="text"/>	Housing, Employment or Health Care Discrimination <input type="text"/>
Immigration Status <input type="text"/>	Mental Health Commitment <input type="text"/>
Social Security Disability or SSI <input type="text"/>	DUI <input type="text"/>
Other <input style="width: 100%;" type="text"/>	

Is the client currently on parole or probation?

How much combined time has the client spent in jail or prison (Total Months)?



 

Complete the fields as follows:

Divorce, Child Support or Custody	Use the Yes/No dropdown to indicate whether the client has legal issues pending with divorce, child support or custody. If the information is unavailable, select "Unknown."
Immigration Status	Use the Yes/No dropdown to indicate whether the client has legal issues pending with immigration status. If the information is unavailable, select "Unknown."
Social Security Disability or SSI	Use the Yes/No dropdown to indicate whether the client has legal issues pending with Social Security Disability or SSI. If the information is unavailable, select "Unknown."
Other	If the client has other legal issues pending, enter them in this text field.

Parole or Probation	Use the Yes/No dropdown to indicate whether the client has legal issues pending with parole or probation. If the information is unavailable, select "Unknown."
Jail or Prison Time	Use the Yes/No dropdown to indicate whether the client has legal issues pending with jail or prison time. If the information is unavailable, select "Unknown."
Housing, Employment or Health Care Discrimination	Use the Yes/No dropdown to indicate whether the client has legal issues pending with housing, employment or health care discrimination. If the information is unavailable, select "Unknown."
Mental Health Commitment	Use the Yes/No dropdown to indicate whether the client has legal issues pending with mental health commitment. If the information is unavailable, select "Unknown."
DUI (driving under the influence)	Use the Yes/No dropdown to indicate whether the client has legal issues pending with DUI. If the information is unavailable, select "Unknown."

After entering a new assessment, or editing an existing assessment:

	Click the Save + Next button to save your input and proceed to the Psychosocial Factors: Diagnostic Impression and Mental Health History edit screen.
	Click the Cancel button to return to the Assessments screen without saving your input.

Psychosocial Factors: Diagnostic Impression and Mental Health History

Use this screen to record the client's mental health history.

Dianthus S Agott Psychosocial Factors: Diagnostic Impression and Mental Health History

Diagnostic Impressions and Mental Health History

Anxiety Symptoms

Depressive Symptoms

Personality Symptoms

Psychotic Symptoms

Substance Use

How would you describe the client's current drug/alcohol use?

Psychiatric History? **Current Psychiatric Medications?**

If yes, specify: If yes, specify:

History of Drug Treatment? **History of Psychiatric Hospitalization?**



If yes, specify: If yes, specify:

Complete the fields as follows:

<p>Anxiety Symptoms</p>	<p>Select from the dropdown to indicate the degree of client's anxiety symptoms.</p> <p>If the information is unavailable, select "Unknown."</p> <p>To the right of this dropdown, use the second dropdown to indicate whether or not the client's symptoms are affecting risk.</p>
<p>Depressive Symptoms</p>	<p>Select from the dropdown to indicate the degree of client's depressive symptoms.</p> <p>If the information is unavailable, select "Unknown."</p> <p>To the right of this dropdown, use the second dropdown to indicate whether or not the client's symptoms are affecting risk.</p>
<p>Personality Symptoms</p>	<p>Select from the dropdown to indicate the degree of the client's personality symptoms.</p> <p>If the information is unavailable, select "Unknown."</p> <p>To the right of this dropdown, use the second dropdown to indicate whether or not the client's symptoms are affecting risk.</p>
<p>Psychotic Symptoms</p>	<p>Select from the dropdown to indicate the degree of the client's psychotic symptoms.</p> <p>If the information is unavailable, select "Unknown."</p> <p>To the right of this dropdown, use the second dropdown to indicate whether or not the client's symptoms are affecting risk.</p>

Substance Use	Select from the dropdown to indicate the degree of the client's current drug/alcohol use, e.g., recreation user, heavy user, dependent user. To the right of this dropdown, use the second dropdown to indicate whether or not the client's substance use is affecting risk.
How would you describe the client's current drug/alcohol use?	Select from the dropdown to indicate the degree of the client's current drug/alcohol use, e.g., recreation user, heavy user, dependent user.
Psychiatric History?	Use the Yes/No dropdown to indicate whether the client has any psychiatric history. If the information is unavailable, select "Unknown."
If yes, specify	If the client has psychiatric history, briefly describe it in this text field.
History of Drug Treatment?	Use the Yes/No dropdown to indicate whether the client has any drug treatment history. If the information is unavailable, select "Unknown."
If yes, specify	If the client has drug treatment history, briefly describe it in this text field.
Current Psychiatric Medications?	Use the Yes/No dropdown to indicate whether the client is currently on any psychiatric medications. If the information is unavailable, select "Unknown."
If yes, specify	If the client is currently on any psychiatric medications, briefly describe them in this text field.
History of Psychiatric Hospitalization?	Use the Yes/No dropdown to indicate whether the client has any psychiatric hospitalization history. If the information is unavailable, select "Unknown."
If yes, specify	If the client has psychiatric hospitalization history, briefly describe it in this text field.

After entering a new assessment, or editing an existing assessment, click on one of the following:

	Click the Save button to save your input and return to the Assessments screen.
	Click the Cancel button to return to the Assessments screen without saving your input.

2.10.6.2 Functional Status

Note: When you enter a new client a red message appears next to the client's name on the screen. This message reads, "Check the client's CDC Disease Status." ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.

The purpose of the Functional Status Assessment is to evaluate clients for their functional status and quality of life at the present time and over the past month. This assessment is divided into three screens.

View help for [Functional Status/Quality of Life](#)


View help for [Functional Status/Quality of Life Section 2](#)

View help for [Functional Status/Quality of Life Section 3](#)

Functional Status/Quality of Life

Use this screen to evaluate the client's functional status and quality of life. The assessment is separated into three sections. Reach this screen by clicking **Edit** or **New** in the Functional Status section of the read-only Assessments screen.

Dianthus S Agott Functional Status/Quality of Life

As of Date 

Staff

1. In general, would you say your health is:

2. Please select the option that best describes whether each of the following statements is true or false for you.

a. I am somewhat ill.

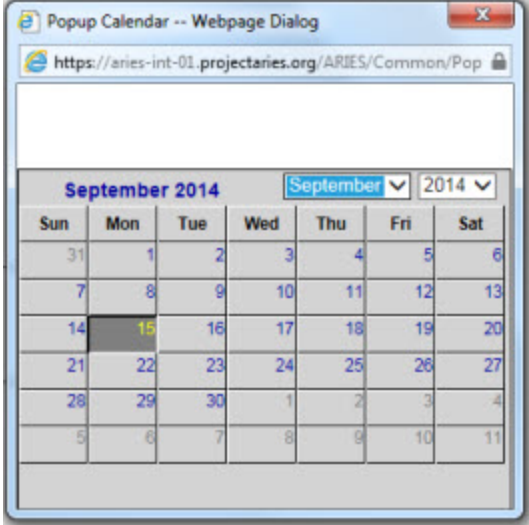
b. I am as healthy as anybody I know.

c. My health is excellent.




d. I have been feeling bad lately.

Complete the fields on the screen as follows:

As of Date	Enter the date these questions are being asked. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
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	 <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
Staff	Use the dropdown to select the name of the staff member completing these questions.
1. In general would you say your health is	Use the dropdown to select the client's general state of health, e.g., excellent, fair, etc. If the information is unavailable, select "Unknown."
2. Please select the option that best describes whether each of the following statements is true or false for you	
I am somewhat ill	Use the dropdown to select the option that best describes this statement, i.e., definitely false, definitely true, don't know, etc. If the information is unavailable, select "Unknown."
I am as healthy as anybody I know	Use the dropdown to select the option that best describes this statement, i.e., definitely false, definitely true, don't know, etc. If the information is unavailable, select "Unknown."
My health is excellent	Use the dropdown to select the option that best describes this statement, i.e., definitely false, definitely true, don't know, etc. If the information is unavailable, select "Unknown."
I have been feeling bad lately	Use the dropdown to select the option that best describes this statement, i.e., definitely false, definitely true, don't know, etc. If the information is unavailable, select "Unknown."

After completing the fields on this screen:

	<p>Click the Save + Next button to save your input and proceed to the Functional Status/Quality of Life Section 2 edit screen.</p>
	<p>Click the Cancel button to return to the Assessments screen without saving your input.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is only available to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the status/quality-of-life row. Once deactivated, the status/quality-of-life row will no longer appear on the Assessments screen.</p> <p>Clicking the Deactivate button does not deactivate the client with ARIES; it only deactivates the status/quality-of-life row.</p>

Functional Status/Quality of Life Section 2

Dianthus S Agott Functional Status/Quality of Life Section 2

For each of the following questions, please select the option for the one answer that comes closest to the way you have been feeling during the past month:

3. How much of the time, during the past month, has your health limited your social activities (like visiting with friends or close relatives)?

4. How much of the time, during the past month:



a. Have you been a very nervous person?

b. Have you felt calm and peaceful?

c. Have you felt downhearted and blue?

d. Have you been a happy person?

e. Have you felt so down in the dumps that nothing could cheer you up?






For each of the following questions, select the option that comes closest to the way the client has been feeling during the past month:

<p>3. How much time has your health limited your social activities...?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time.</p> <p>If the information is unavailable, select "Unknown."</p>
<p>4. How much of the time, during the past month:</p>	
<p>a. Have you been a very nervous person?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time.</p> <p>If the information is unavailable, select "Unknown."</p>

<p>b. Have you felt calm and peaceful?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time. If the information is unavailable, select "Unknown."</p>
<p>c. Have you felt downhearted and blue?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time. If the information is unavailable, select "Unknown."</p>
<p>d. Have you been a happy person?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time. If the information is unavailable, select "Unknown."</p>
<p>e. Have you felt so down in the dumps that nothing could cheer you up?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time. If the information is unavailable, select "Unknown."</p>

After completing the fields on this screen:

	<p>Click the Save + Next button to save your input and proceed to the Functional Status/Quality of Life Section 3 edit screen.</p>
	<p>Click the Cancel button to return to the Assessments screen without saving your input.</p>

Functional Status/Quality of Life Section 3

Dianthus S Agott Functional Status/Quality of Life Section 3

For each of the following questions, please select the option for the one answer that comes closest to the way you have been feeling during the past month:

5. How often during the past month:

a. Did you feel full of pep?

b. Did you feel worn out?

c. Did you feel tired?

d. Did you have enough energy to do the things you wanted to do?

e. Did you feel weighed down by your health problems?

f. Were you discouraged by your health problems?

g. Did you feel despair over your health problems?

h. Were you afraid because of your health?

i. Did you feel overwhelmed by the number and frequency of HIV medication you have to take each day?

6. How has the quality of your life been during the past month? That is, how have things been going for you?

7. How would you rate your physical health and emotional condition now compared to a month ago?



For each of the following questions, select the option that comes closest to the way the client has been feeling during the past month:

<p>5. How often during the past month:</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time, etc.</p> <p>If the information is unavailable, select "Unknown."</p>
<p>a. Did you feel full of pep?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time.</p> <p>If the information is unavailable, select "Unknown."</p>
<p>b. Did you feel worn out?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time.</p> <p>If the information is unavailable, select "Unknown."</p>
<p>c. Did you feel tired?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time.</p> <p>If the information is unavailable, select "Unknown."</p>

<p>d. Did you have enough energy to do the things you wanted to do?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time.</p> <p>If the information is unavailable, select "Unknown."</p>
<p>e. Did you feel weighed down by your health problems?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time.</p> <p>If the information is unavailable, select "Unknown."</p>
<p>f. Were you discouraged by your health problems?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time, etc.</p> <p>If the information is unavailable, select "Unknown."</p>
<p>g. Did you feel despair over your health problems?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time, etc.</p> <p>If the information is unavailable, select "Unknown."</p>
<p>h. Were you afraid because of your health?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time, etc.</p> <p>If the information is unavailable, select "Unknown."</p>
<p>i. Did you feel overwhelmed by the number and frequency of HIV medications you have to take each day?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., all of the time, some of the time, none of the time, etc.</p> <p>If the information is unavailable, select "Unknown."</p>
<p>6. How has the quality of your life been during the past month? That is, how have things been going for you?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., pretty good, good and bad parts about equal, etc.</p> <p>If the information is unavailable, select "Unknown."</p>

<p>7. How would you rate your physical health and emotional condition now compared to a month ago?</p>	<p>Use the dropdown to select the option that best describes this statement for the past month, e.g., pretty good, good and bad parts about equal, etc.</p> <p>If the information is unavailable, select "Unknown."</p>
---	---

After completing the fields on this screen:

	<p>Click the Save button to save your input and return to the Assessments screen.</p>
	<p>Click the Cancel button to return to the Assessments screen without saving your input.</p>

2.10.6.3 Behavioral Risk

Note: When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.

Clients can be assessed for HIV transmission risk, including sexual and substance abuse behaviors as well as changes in life circumstances or health and mental status that may affect risk behaviors.

View help for [Behavioral Risk, Section 1](#)


View help for [Behavioral Risk, Section 2](#)

View help for [Behavioral Risk, Section 3](#)

View help for [Behavioral Risk, Section 4](#)

Behavioral Risk, Section 1

Dianthus S Agott Behavioral Risk, Section 1

As of Date 

Staff

In the past 3 months, have you...

Been homeless?

Ever injected drugs?

Been in alcohol or drug treatment?

Ever been in alcohol or drug treatment?

Had sex while high on drugs or alcohol?

Ever has sex against his/her will?

Had sex to get money, drugs, shelter, etc?

Ever had sex with other men (men only)?

Paid for sex with money or drugs?

Had sex with a person who injects drugs?

Are you now pregnant now? (women only)

Had sex with a man who has sex with men?

Been diagnosed with Hepatitis C?

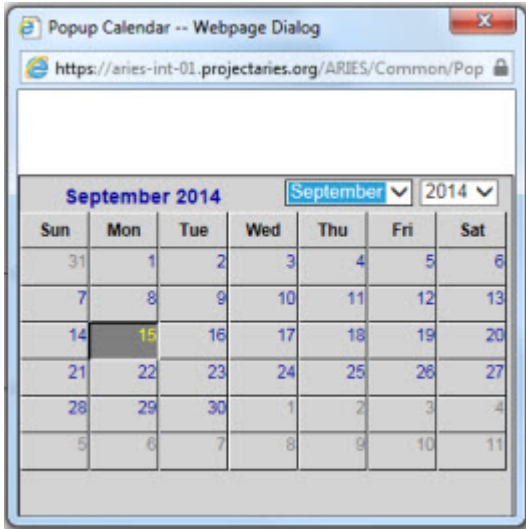
Been diagnosed with a sexually transmitted disease (e.g., Syphilis, Chlamydia, Gonorrhea, Hepatitis B)?

Been in the correctional system? (Probation, parole, secured detention, juvenile corrections, etc.)

Use this screen to evaluate the client's HIV transmission risk, including sexual and substance abuse behaviors as well as changes in life circumstances or health and mental status that may affect risk behaviors. The assessment is separated into four sections.

Reach this screen by clicking **Edit** or **New** in the Behavioral Assessment section of the read-only Assessments screen.




Complete the fields as follows:

<p>As of Date</p>	<p>Enter the date these questions are being asked. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
--------------------------	--

Staff	Use the dropdown to select the name of the staff member completing these questions.
In the past three months, have you...	
Been homeless?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Been in alcohol or drug treatment?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Had sex while high on drugs or alcohol?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Had sex to get money, drugs, shelter, etc?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Paid for sex with money or drugs?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Had sex with a person who injects drugs?	Use the Yes/No dropdown to answer this question. If the client is not sure, select "Not Sure." If the information is unavailable, select "Unknown."
Had sex with a man who has sex with men?	Use the Yes/No dropdown to answer this question. If the client is not sure, select "Not Sure." If the information is unavailable, select "Unknown."
Been diagnosed with Hepatitis C?	Use the Yes/No dropdown to answer this question. If the client is not sure, select "Not Sure." If the information is unavailable, select "Unknown."
Have you...	
Ever injected drugs?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Ever been in alcohol or drug treatment?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Ever has sex against his/her will?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Ever had sex with other men (men only)?	Use the Yes/No dropdown to answer this question.

	If the information is unavailable, select "Unknown."
Are you now pregnant? (women only)	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Been diagnosed with a sexually transmitted disease (e.g., Syphilis, Chlamydia, Gonorrhea, Hepatitis B?)	Use the Yes/No dropdown to answer this question. If the client is not sure, select "Not Sure." If the information is unavailable, select "Unknown."
Been in the correctional system? (Probation, parole, secured detention, juvenile corrections, etc.)	Use the Yes/No dropdown to answer this question. If the client is not sure, select "Not Sure." If the information is unavailable, select "Unknown."

After completing the fields on this screen:

	Click the Save + Next button to save your input and proceed to the Behavioral Risk Section 2 edit screen.
	Click the Cancel button to return to the Assessments screen without saving your input.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is only available to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the status/quality-of-life row. Once deactivated, the status/quality-of-life row will no longer appear on the Assessments screen.</p> <p>Clicking the Deactivate button does not deactivate the client with ARIES; it only deactivates the status/quality-of-life row.</p>

Behavioral Risk, Section 2

Dianthus S Agott Behavioral Risk, Section 2

In the past 3 months, have you had vaginal, oral or anal sex?

If Yes, with a...

Man? If Yes, how many men?

Woman? If Yes, how many women?

Transgender? If Yes, how many transgender?

In the past 3 months, which types of sex have you had, and how often did you or your partner use condoms or barriers for each type of sex?

Had vaginal sex?

Performed anal sex? (top)

Received anal sex? (bottom)

Performed oral sex?

Received oral sex?

In the past 3 months, have you had unprotected anal or vaginal sex with someone...

Who was HIV Positive (has HIV)? If Yes, how many partners?

Who was HIV Negative? If Yes, how many partners?

Whose HIV status you did not know? If Yes, how many partners?

Do you have a spouse or main partner?

If yes, for how long? Years Months

Is your partner?

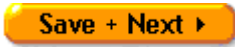

Complete the following information on the screen:

In the past 3 months, have you had vaginal, oral or anal sex?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
If yes, with a man?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
If yes, how many men?	If yes to the above question, enter the number of men.
If yes, with a woman?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
If yes, how many women?	If yes to the above question, enter the number of women.
If yes, with a transgender?	Use the Yes/No dropdown to answer this question.

	If the information is unavailable, select "Unknown."
If yes, how many transgender?	If yes to the above question, enter the number of transgender.
In the past 3 months, which types of sex have you had, and how often did you or your partner use condoms or barriers for each type of sex?	
Had vaginal sex?	Select the appropriate answer from the dropdown. If the information is unavailable, select "Unknown."
Performed anal sex (top)?	Select the appropriate answer from the dropdown. If the information is unavailable, select "Unknown."
Received anal sex (bottom)?	Select the appropriate answer from the dropdown. If the information is unavailable, select "Unknown."
Performed oral sex?	Select the appropriate answer from the dropdown. If the information is unavailable, select "Unknown."
Received oral sex?	Select the appropriate answer from the dropdown. If the information is unavailable, select "Unknown."
In the past 3 months, have you had unprotected anal or vaginal sex with someone...	
Who was HIV-Positive?	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many partners in the text field to the right. If the information is unavailable, select "Unknown."
Who was HIV-Negative?	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many partners in the text field to the right.

	If the information is unavailable, select "Unknown."
Whose HIV status you did not know?	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many partners in the text field to the right. If the information is unavailable, select "Unknown."
Do you have a spouse or main partner?	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
If yes, for how long?	Enter the approximate number of years and months in the text fields to the right.
Is your partner?	Use the top-down to indicate whether the partner is HIV-positive or HIV-negative. If the client is not sure, select "Client doesn't know." If the information is unavailable, select "Unknown."

After entering a new assessment, or editing an existing assessment:

	Click the Save + Next button to save your input and proceed to the Behavioral Risk Section 3 edit screen.
	Click the Cancel button to return to the Assessments screen without saving your input.

Behavioral Risk, Section 3

Dianthus S Agott Behavioral Risk, Section 3

In the past 30 days, have you used any of the following non-injected drugs?

If Yes, have you used the following drugs? **If Yes, how many times in the past 30 days?**



Crack	<input type="text"/>	<input type="text"/>
Cocaine	<input type="text"/>	<input type="text"/>
Heroin	<input type="text"/>	<input type="text"/>
Amphetamines (speed, crystal)	<input type="text"/>	<input type="text"/>
Amyl Nitrate (poppers)	<input type="text"/>	<input type="text"/>
Party drugs (Ecstasy, Special K, GHB)	<input type="text"/>	<input type="text"/>
Marijuana	<input type="text"/>	<input type="text"/>
5 or more alcoholic drinks (in one sitting)	<input type="text"/>	<input type="text"/>
Other: <input type="text"/>	<input type="text"/>	<input type="text"/>

Complete the information on the screen as follows:

In the past 30 days, have you used any of the following <u>non-injected</u> drugs?	Use the Yes/No dropdown to answer this question. If Yes, complete the questions below. If the information is unavailable, select "Unknown."
If Yes, have you used the following drugs?	
Crack	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
Cocaine	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
Heroin	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
Amphetamines (speed, Crystal)	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
Amyl Nitrate (poppers)	Use the Yes/No dropdown to answer this question.

	<p>If the answer is Yes, indicate how many times in the past 30 days in the text field to the right.</p> <p>If the information is unavailable, select "Unknown."</p>
Party drugs (Ecstasy, Special K, GHB)	<p>Use the Yes/No dropdown to answer this question.</p> <p>If the answer is Yes, indicate how many times in the past 30 days in the text field to the right.</p> <p>If the information is unavailable, select "Unknown."</p>
Marijuana	<p>Use the Yes/No dropdown to answer this question.</p> <p>If the answer is Yes, indicate how many times in the past 30 days in the text field to the right.</p> <p>If the information is unavailable, select "Unknown."</p>
Five or more alcoholic drinks (in one sitting)	<p>Use the Yes/No dropdown to answer this question.</p> <p>If the answer is Yes, indicate how many times in the past 30 days in the text field to the right.</p> <p>If the information is unavailable, select "Unknown."</p>
Other	<p>Use the Yes/No dropdown to answer this question.</p> <p>If the answer is Yes, enter the name of the drug in the text field to the left, and indicate how many times in the past 30 days in the text field to the right.</p> <p>If the information is unavailable, select "Unknown."</p>

After entering a new assessment, or editing an existing assessment:

	Click the Save + Next button to save your input and proceed to the Behavioral Risk Section 4 edit screen.
	Click the Cancel button to return to the Assessments screen without saving your input.

Behavioral Risk, Section 4

Dianthus S Agott Behavioral Risk, Section 4

In the past 30 days, have you injected any drugs or medication?

If yes, have you injected any of the following drugs or medications? If Yes, how many times in the past 30 days?

Heroin	<input type="text"/>	<input type="text"/>		
Cocaine/Crack	<input type="text"/>	<input type="text"/>		
Amphetamines (speed, crystal)	<input type="text"/>	<input type="text"/>		
Steroids	<input type="text"/>	<input type="text"/>		
Insulin	<input type="text"/>	<input type="text"/>		
Hormones	<input type="text"/>	<input type="text"/>		
Prescription drugs (codeine, morphine)	<input type="text"/>	<input type="text"/>		
Other:	<input type="text"/>	<input type="text"/>		

If you have injected drugs in the past 30 days, what kind of needles did you use? In the past 30 days, have you shared needles with someone...

New	<input type="text"/>			
Bleached	<input type="text"/>		Who was HIV positive (has HIV)	<input type="text"/>
Shared (someone used before me)	<input type="text"/>		Who was HIV negative	<input type="text"/>
Shared (someone used after me)	<input type="text"/>		Whose HIV status you didn't know	<input type="text"/>
Reused my own	<input type="text"/>			
Origin Unknown	<input type="text"/>			



For the following questions, in the past 30 days, has the client injected any of the following drugs or medication:

In the past 30 days, have you injected any drugs or medication?	Use the Yes/No dropdown to answer this question. If Yes, complete the questions below. If the information is unavailable, select "Unknown."
If yes, have you injected any of the following drugs or medications?	
Heroin	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
Cocaine / Crack	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
Amphetamines (speed, Crystal)	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
Steroids	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right.

	If the information is unavailable, select "Unknown."
Insulin	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
Hormones	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
Prescription drugs (codeine, morphine)	Use the Yes/No dropdown to answer this question. If the answer is Yes, indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
Other	Use the Yes/No dropdown to answer this question. If the answer is Yes, enter the name of the drug in the text field to the left, and indicate how many times in the past 30 days in the text field to the right. If the information is unavailable, select "Unknown."
If you have injected drugs in the past 30 days, what kind of needles did you use?	
New	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Bleached	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Shared (someone used before me)	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Shared (someone used after me)	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Reused my own	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Origin Unknown	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
In the past 30 days, have you shared needles with someone...	

Who was HIV positive (has HIV)	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Who was HIV negative	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."
Whose HIV status you didn't know	Use the Yes/No dropdown to answer this question. If the information is unavailable, select "Unknown."

After entering a new assessment, or editing an existing assessment:

	Click the Save button to save your input and return to the Assessments screen.
	Click the Cancel button to return to the Assessments screen without saving your input.

2.10.6.4 Barriers to Care

Note: When you enter a new client a red message appears next to the client's name on the screen. This message reads, "Check the client's CDC Disease Status." ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.

The Barriers to Care Assessment is separated into two sections. Use these screens to identify HIV-positive clients who have never been in care and to link them with the appropriate service providers. This assessment also works with clients who have dropped out of care, as part of an effort to bring them back into care.


Reach the first screen by clicking **Edit** or **New** in the Barriers to Care section of the read-only Assessments screen.

View help for [Barriers to Care \(first screen\)](#)


View help for [Barriers to Care \(second screen\)](#)


Barriers to Care (first screen)

Rex D Almondry Barriers to Care

Assessment Date 

Bridge Worker

Date of first HIV-positive test 

Date dropped out of HIV medical care 

Current or former EIP client

Financial barriers

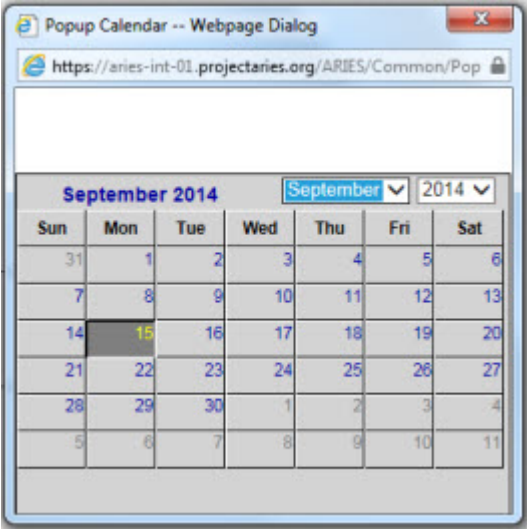
- Not enough money
- No health insurance/not enough health insurance
- Could not afford time off from work
- Other money-related reasons (specify)

Health barriers

- Felt too sick to go
- Felt too depressed to go
- Disability prevented going
- Drug or alcohol use prevented going
- Other health-related reason (specify)



Save + Next **Cancel**

Complete the fields as follows:

Assessment Date	<p>Enter the date of this assessment. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> 
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	For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.
Bridge Worker	Use the dropdown to select the name bridge worker completing these questions.
Date of first HIV-positive test	This is a read-only field displaying data entered on the Basic Medical edit screen.
Date dropped out of HIV medical care	Enter the date the client dropped out of HIV medical care. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon. For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.
Current or former EIP client	Use the Yes/No dropdown to indicate whether the client is a current or former EIP client. If the information is unknown, select "Unknown."
Financial barriers	Check the box for all of the following barriers that apply: Not enough money No health insurance/not enough health insurance Could not afford time off from work Other money-related reasons (specify). If "Other" is selected, specify the reason in the text field below. This is a scrollable field. It is not activated unless you check "Other."
Health barriers	Check the box for all of the following barriers that apply: Felt too sick to go Felt too depressed to go Disability prevented going Drug or alcohol use prevented going Other health-related reasons (specify). If "Other" is selected, specify the reason in the text field below. This is a scrollable field. It is not activated unless you check "Other."

After entering a new assessment, or editing an existing assessment:

	Click the Save + Next button to save your input and proceed to the second Barriers to Care edit screen.
	Click the Cancel button to return to the Assessments screen without saving your input.

Barriers to Care (second screen)

Rex D Almondry Barriers to Care

Clinic/Facility barriers

Didn't know where to go to get care
 Clinic was inconvenient (location, hours, etc.)
 Clinic staff didn't speak client's language
 Clinic staff was rude/unkind
 Clinic waiting time was too long
 Unable to get appointment/appointment offered too far in future
 Clinic rules required abstinence and/or drug testing
 Other clinic/facility-related reasons (specify)

Housing/Responsibility barriers

Unable to get childcare
 Unable to get time off from work
 Needed to care for an adult family member or friend
 Homeless
 In jail or prison
 Other reasons related to housing or responsibilities (specify)

Knowledge/belief barriers



Didn't want to think about being HIV+
 Dislike of doctors/clinics
 Didn't believe they were infected with HIV
 Didn't feel sick
 Believed HIV medication wouldn't help
 Believed HIV treatment would be unpleasant or painful
 Too embarrassed or ashamed to go for medical care
 Didn't want anyone to know they were HIV-positive
 Other reasons related to knowledge or beliefs (specify)

Complete the fields as follows:

Clinic/Facility barriers	Check the box for all of the following barriers that apply: <ul style="list-style-type: none"> • Didn't know where to go to get care
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	<ul style="list-style-type: none"> • Clinic was inconvenient (location, hours, etc.) • Clinic staff didn't speak client's language • Clinic staff was rude/unkind • Clinic waiting time was too long • Unable to get appointment/appointment offered too far in future • Clinic rules required abstinence and/or drug testing • Other clinic/facility-related reasons (specify). <p>If "Other" is selected, specify the reason in the text field below. This is a scrollable field. It is not activated unless you check "Other."</p>
<p>Housing/Responsibility barriers</p>	<p>Check the box for all of the following barriers that apply:</p> <p>Unable to get childcare</p> <p>Unable to get time off from work</p> <p>Needed to care for an adult family member or friend</p> <p>Homeless</p> <p>In jail or prison</p> <p>Other reasons related to housing or responsibilities (specify).</p> <p>If "Other" is selected, specify the reason in the text field below. This is a scrollable field. It is not activated unless you check "Other."</p>
<p>Knowledge/Belief barriers</p>	<p>Check the box for all of the following barriers that apply:</p> <p>Didn't want to think about being HIV+</p> <p>Dislike of doctors/clinics</p> <p>Didn't believe they were infected with HIV</p> <p>Didn't feel sick</p> <p>Believed HIV medication wouldn't help</p> <p>Believed HIV treatment would be unpleasant or painful</p> <p>Too embarrassed or ashamed to go for medical care</p> <p>Didn't want anyone to know they were HIV-positive</p> <p>Other reasons related to knowledge or beliefs (specify).</p> <p>If "Other" is selected, specify the reason in the text field below. This is a scrollable field. It is not activated unless you check "Other."</p>

After entering a new assessment, or editing an existing assessment:

	Click the Save button to save your input and return to the Assessments screen.
	Click the Cancel button to return to the Assessments screen without saving your input.

2.10.6.5 SAMISS Assessment Edit


The Substance Abuse and Mental Illness Symptoms Screener (SAMISS) Edit screen stores information gathered about a client's possible substance abuse.

Notes

- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- RSR collects data on SAMISS from the Mental Health and Substance Abuse screen. Before running RSR, sure to enter client data on this screen.
- The top of this Help page describes part 1 of the SAMISS Assessment. Click [here](#) for a description of SAMISS Assessment Part 2 on this Help page.

Part 1

Rex D Almondry SAMISS Assessment Part 1

As of Date 

Staff

Substance Abuse

1. How often do you have a drink containing alcohol?

2. How many drinks do you have on a typical day when you are drinking?

3. How often do you have 4 or more drinks on 1 occasion?

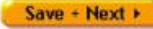

4. In the past year, how often did you use nonprescription drugs to get high or to change the way you feel?

5. In the past year, how often did you use drugs prescribed to you or to someone else to get high or change the way you feel?

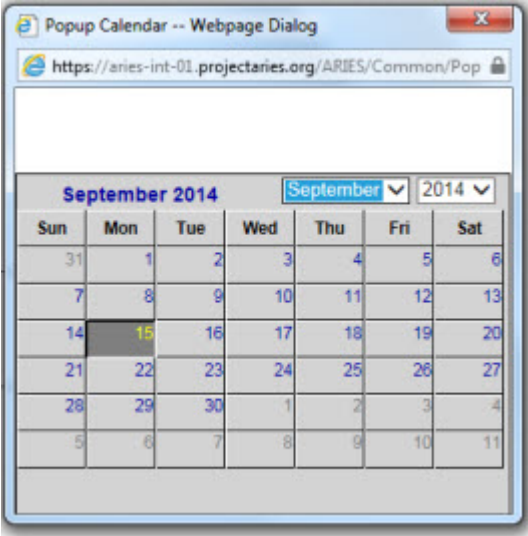



6. In the past year, how often did you drink or use drugs more than you meant to?

7. How often did you feel you wanted or needed to cut down on your drinking or drug use in the past year, and were not able to?

Refer to Substance Abuse Treatment Unknown

Answer the questions in the page.

<p>As of Date</p>	<p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the text field. The calendar window automatically closes.</p> <p>Or you may type the date in the window. Use the format MM/DD/YYYY.</p> 
<p>Staff</p>	<p>Use the dropdown to select the staff member assigned to this client.</p>
<p>Questions 1 through 7</p>	<p>To answer each question, make a selection from use the adjacent dropdown list.</p>
<p>Refer to Substance Abuse Treatment</p>	<p>The display in this field is based on your input to the screen. If you selected "Yes" from one or more dropdowns, this field will display "Yes." If you answered "No" to all questions, this fields displays "No." If you did not complete any fields on the screen, this field will display "Unknown."</p> <p>Note: Unless at least one question is answered "Yes" or "No," this assessment will not qualify as an assessment for RDR/RSR purposes. An "Unknown" response is treated as if the assessment never took place for RDR/RSR purposes.</p>
<p>After completing your entries:</p>	
	<p>Click this button to save your input and proceed to the SAMISS Assessment Part 2 Edit screen.</p>
	<p>Click this button to save your input and return to the read-only Assessments screen.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and</p>

	<p>prior consultation with the system administrator is highly recommended.</p> <p>Click the Deactivate button to deactivate the records on this screen.</p> <p>Clicking the Deactivate button does not deactivate the client with ARIES; it only deactivates the records on the SAMISS Assessment Part 1 screen.</p>
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Part 2

Part 2 continues the questionnaire.

Rex D Almondry SAMISS Assessment Part 2

Mental Health

8. In the past year, when not high or intoxicated, did you ever feel extremely energetic or irritable and more talkative than usual?

9. In the past year, were you ever on medication or antidepressants for depression or nerve problems?

10. In the past year, was there ever a time when you felt sad, blue, or depressed for more than 2 weeks in a row?

11. In the past year, was there ever a time lasting more than 2 weeks when you lost interest in most things like hobbies, work, or activities that usually give you pleasure?

12. In the past year, did you ever have a period lasting more than 1 month when most of the time you felt worried and anxious?

13. In the past year, did you have a spell or an attack when all of a sudden you felt frightened, anxious, or very uneasy when most people would not be afraid or anxious?

14. In the past year, did you ever have a spell or an attack when for no reason your heart suddenly started to race, you felt faint, or you couldn't catch your breath?

If yes, please explain



15. During your lifetime, as a child or adult, have you experienced or witnessed traumatic event(s) that involved harm to yourself or to others?

If yes: In the past year, have you been troubled by flashbacks, nightmares, or thoughts of the trauma?

16. In the past 3 months, have you experienced any event(s) or received information that was so upsetting it affected how you cope with everyday life?

Refer to Mental Health Counseling Unknown

Questions 8 through 14	Select an answer from each dropdown. The choices are "Yes," "No" and "Unknown."
If yes, please explain	If you selected "Yes" for question 14, type an explanation in this scrollable text window.


If yes: In the past year...	If you selected "Yes" for question 15, the dropdown for "If yes..." becomes active. Select "Yes," "No" or "Unknown."
Refer to Mental Health Counseling	<p>The display in this field is based on your input to the screen. If you selected "Yes" from one or more dropdowns, this field will display "Yes." If you answered "No" to all questions, this field displays "No." If you did not complete any fields on the screen, this field will display "Unknown."</p> <p>Note: Unless at least one question is answered "Yes" or "No," this assessment will not qualify as an assessment for RDR/RSR purposes. An "Unknown" response is treated as if the assessment never took place for RDR/RSR purposes.</p>
After completing your entries:	
	Click Save to store your updates and return to the read-only Assessments screen.
	Click Cancel to discard your updates and return to the read-only Assessments screen.

2.10.6.6 Risk Reduction Screening Edit

Notes:



- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "Check the client's CDC Disease Status." ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.
- Reach the Risk Reduction Screening Edit screen by clicking **Edit** or **New** in the Risk Reduction Screening section of the read-only Assessments screen.

Rex D Almondry Risk Reduction Screening

Screening Date 




Screening Tool

Outcome

Complete the fields as follows:

Screening Date	Enter the date of the risk reduction screening. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.
-----------------------	---

	 <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
Screening Tool	Enter the type of screening tool used in the text box.
Outcome	Enter the outcome of the screening in the text box.
When you have entered all information:	
	Click the Save button to save your input and return to the Assessments screen.
	Click the Cancel button to return to the Assessments screen without saving your input.

2.11 Needs Assessment/Care Plan/Referral Overview

Case managers routinely perform needs assessments to determine the services clients require. From an assessment, a [care plan](#) can be designed, outlining problem-solution steps to meet the client's needs. The care plan may require interventions and services from your agency, and may also require referrals to help clients access services that are unavailable at your agency.

You can think of the needs assessment as a "problem statement." The screens in the ARIES Care Plan tab are valuable tools to help you assess problems/needs (Needs Assessment tab), develop a solution (Care Plan tab) and manage tasks and resources (Tasks, Interventions, Referrals, Services) to bring about that solution. Therefore, when creating an initial care plan for a client, it is strongly recommended that you start by performing a [needs assessment](#) for the client. Then use the tabs under Care Plan to create the plan and track it to completion.

To navigate to the Needs Assessment, Care Plan, or Referral screen:

- Click the Care Plan tab.

- Then from the second tier of three tabs, click one of the following three tabs.

2.11.1 Needs Assessment

Case managers perform needs assessments during an intake and periodically thereafter. The Needs Assessment tab provides a checklist of general services the client may require.

With the needs assessment as a starting point, ARIES can generate a care plan template for each need. Care plans help you coordinate and track tasks, referrals and services for the client. Needs assessment information can also be highly useful to researchers and administrative agencies in analyzing demographics and assessing community needs.

To navigate from a client's information screen to the Needs Assessment screen:

- Click the Care Plan tab from the top tier of tabs.
- Then, on the second tier of tabs, click Needs Assessment.

Date	Program	Needs
2/1/2010	Ryan White	Outpatient/Ambulatory Medical Care; Medical Nutrition Therapy; Medical Case Management (including Treatment Adherence); Early Intervention Services (Parts A and B); Health Insurance Premium and Cost Sharing Assistance;
2/1/2010	Ryan White	Outpatient/Ambulatory Medical Care; Medical Nutrition Therapy; Early Intervention Services (Parts A and B); Home and Community-Based Health Services;
1/25/2010	HOPWA	Housing Subsidy Assistance; Housing Placement Assistance;
1/20/2010	Ryan White	AIDS Pharmaceutical Assistance (local); Early Intervention Services (Parts A and B); Health Insurance Premium and Cost Sharing Assistance; Home and Community-Based Health Services;

This screen displays the client's previous needs assessment results. The left column lists the dates of previous needs assessments and the right column lists all the needs identified at those time.

Note: Previously recorded needs assessments cannot be edited or deactivated.

To record a new needs assessment:

- Click the **New** button, which takes you to the [Needs Assessment Edit](#) screen.

2.11.2 Needs Assessment Edit

Notes:

- The Needs Assessment Edit, Care Plan Edit and Referrals Edit screens automatically tag Mental Health and Substance Abuse related entries as non-share, regardless of the client's share status. This affects both new and existing Mental Health and Substance Abuse entries and matches the same data confidentiality rules that exist for client services entered into ARIES.
- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "Check the client's CDC Disease Status." ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in

the client intake screens. Once you supply this information, the red message will disappear.

- When you create a Needs Assessment, ARIES will automatically create a Care Plan for each need for which you have checked the Create Care Plan box.

The Needs Assessment Edit screen lists general services offered by agencies to clients. For certain needs, your source of information may be a tool that focuses on a specific subject (such as the SAMISS for substance abuse). The categories of an assessment can be customized by using the Program dropdown at the top of the screen. For other needs, you may use your skill in eliciting information from the client – the Program dropdown lists will serve as a focus.

RxC D AxD Needs Assessment

Program CARE-HIPP

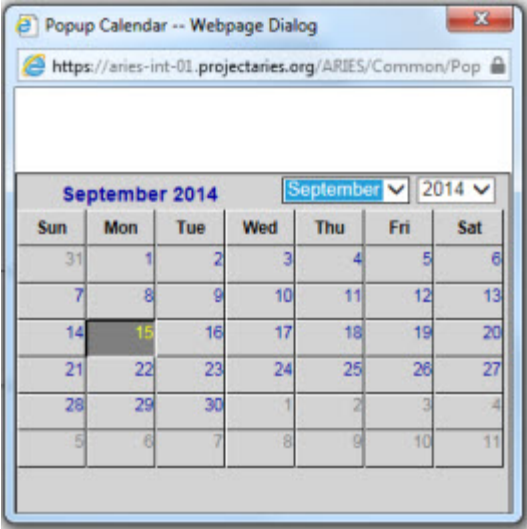


Category	Need	Don't Need	Unknown	Create Care Plan
Outpatient/Ambulatory Medical Care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
AIDS Pharmaceutical Assistance (local)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Oral Health Care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Insurance-Medical	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Insurance-Oral Health Care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Insurance-Prescription Drugs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Medicare/Medicaid Supplement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Other Health Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
<input style="width: 100%;" type="text"/>				

Dated 2/4/2010

Save - Next >
Cancel

Complete the fields as follows:

Program dropdown	From the dropdown, select the new funded program to be added. Once the program is selected, the list of categories appears.
Other text field	If the client has a need not listed on the screen, enter it in the Other text field at the bottom of the list.
Need radio button	Select the Need radio button next to each category that the client needs, whether or not your agency offers services addressing those needs.
Don't Need radio button	Select the Don't Need radio button next to each category that the client does not need.
Unknown radio button	Select the Unknown radio button next to any category where the information isn't available for a specific service.
Create Care Plan checkbox	Check the Create Care Plan checkbox next to each category for which you want ARIES to generate a care plan template.
Dated text field	Enter the date the information was recorded. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Dated" field. A calendar pop-up appears.

	 <p>Use the dropdown lists to select the month and year; then click the specific date to enter it into the text field. The calendar window closes automatically.</p>
<p>After completing the fields on this screen:</p>	
	<p>Click this button to save your input. If you have selected the Create Care Plan checkbox for any need, you will be taken to the Care Plan Edit screen for that service source. Otherwise, you will return to the Needs Assessment screen.</p>
	<p>Click this button to return to the Needs Assessment screen without saving your input.</p>

2.11.3 Care Plan

From a [needs assessment](#), a care plan can be designed outlining steps to meet the client's needs. These steps can include instructions for caregivers, tasks for staff persons and/or clients, referrals, and services. With care plans, case managers can track a client's progress, which helps ensure quality care. Care plans also allow you to list tasks that aren't classified as services but are still necessary for the client's welfare. For example, if a client has memory problems and requires reminder phone calls for appointments, you can assign this task to a staff person.

Case managers can also use tasks as reminders. For example, if you know a client has history of medication [adherence](#) problems, you can assign a task to yourself to follow up with a client's medical provider and see how well the client is adhering to the drug course.

A care plan focuses on meeting a single need of the client. Therefore, multiple care plans can be open for a client at any time.

- On the Care Plan screen, ARIES lists the open care plans first; that is, the plans you can still edit. The most recent plans at the top of the screen.
- Completed care plans are at the bottom of the screen.

- As with specific tasks, the care plan has outcome fields that let you identify when you completed the care plan and whether it was successful in meeting the client's needs.

An important use of the care plan is to document unmet need. The Needs Assessment itself only identifies a need without indicating whether it was met. Creating a care plan allows you to use the "Not Available" option in the Outcome dropdown to record unmet needs.

To navigate to the Care Plan screen from the client's information screen:

- Click the Care Plan tab from the top tier of tabs.
- Then, in the second tier of tabs, click the Care Plan tab.

The Care Plan screen displays the following fields for the client's existing care plans:

Date	The date the care plan was created.
Staff	The name of the staff person who created the care plan.
Program	The program under which any services may be covered. Example: If the care plan is for a client's medical care, "Ryan White" might be listed as the program.
Need/Subneed	The need for which the care plan was created. Example: If a client needs dental health services for a root canal, the need would be listed as Dental care, and the subneed might be Oral Surgery. Subneeds are optional.
Goal	The anticipated outcome of the care plan. Example: If a client needs employment assistance, their goal would be "Find client a full-time job."
Outcome	Whether or not the goal was achieved.
Completed	The date the care plan ended.

Tasks, Referrals, and Services

Each care plan includes a list of tasks, referrals, and services listed in a gray table underneath each care plan row. For example, if a client needed complementary therapies for an anxiety disorder, tasks may include group therapy, pharmaceutical, and transportation services as well as coordinating tasks like reminder phone calls and follow-ups with counselors. All these tasks would be listed under one single care plan.

To edit a care plan, click the **Edit** button to the right of the care plan entry.

To enter a new care plan, click the **New** button.

Both actions take you to the [Care Plan Edit](#) screen.

2.11.4 Care Plan Edit

Note: When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.

This Help page will first discuss the form with the details of the care plan at the top of the Care Plan edit screen. Next the Help page will discuss the [Interventions section](#) at the bottom of the Care Plan edit screen.

Care Plan works best if the client is a Share client. This allows all agencies that serve the client to review and update the care plan, so that all agencies have the most recent data about the client's situation.

However, the Needs Assessment Edit, Care Plan Edit and Referrals Edit screens automatically tag Mental Health and Substance Abuse related entries as non-share, regardless of the client's share status. This affects both new and existing Mental Health and Substance Abuse entries and matches the same data confidentiality rules that exist for client services entered into ARIES.


After a [Needs Assessment](#), the care plan allows you to identify specific interventions (Tasks) to meet a particular need. Each task can be assigned to a staff member within your agency or to the client him/herself. You can identify the date the task began, and a date when you expect the task to be complete. You can also enter a follow-up date when a task has been revisited. And you can record the outcome of the task (successful or unsuccessful) and the date you determined the outcome.



Working with others to meet a specific need may involve providing services to the client within your agency, or referring the client for services outside your agency. You can record Services and Referrals on the Care Plan screen, thus linking them to the care plan so that you can get the big picture by viewing this one screen.

Be aware that Services and Referrals appear on this screen only if they were entered from this screen.

Important: On the Care Plan Edit screen, ARIES requires completion of two fields to complete a Care Plan: Outcome and Date Completed. Regardless of the Outcome dropdown option you select, once you make an entry in the Date Completed field, you can no longer edit the Care Plan record. **DO NOT MAKE AN ENTRY** in the Date Completed field until you are ready to close out the Care Plan.

You can only edit a Care Plan created by your agency, and not a Care Plan created by another agency, even if the client is a Share client.

Hiram S ATestool Care Plan 

Date Need Identified  **Date Completed** 

Staff Admin, Alvin **Outcome**

Program Ryan White

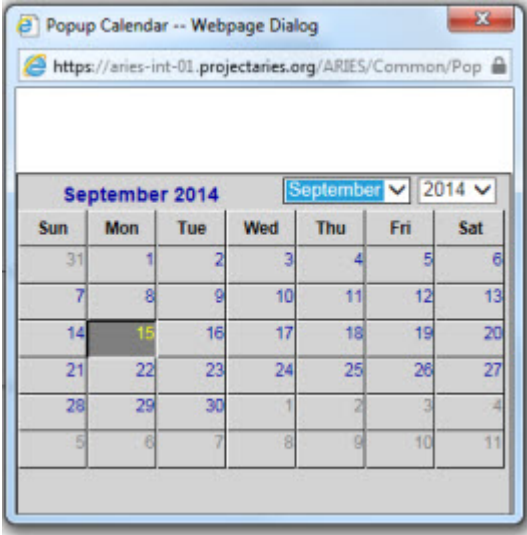
Need Other Services

Subneed Other Services

Goal

If you reached the Care Plan edit screen by clicking **Save + Next** in Needs Assessment Edit with "Create Care Plan" checked, the Date Need Identified field is pre-populated.

If the fields have not been pre-populated, complete them as follows:

<p>Date Need Identified</p>	<p>Enter the date the client's need was identified. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Date Need Identified" field. A calendar pop-up appears.</p>  <p>Use the dropdown lists to select the month and year; then click the specific date to enter it into the text field. The calendar window closes automatically.</p>
<p>Staff</p>	<p>Use the dropdown to select the staff person who will be managing this care plan. ARIES pre-fills your name, so if you're performing data entry tasks, make sure you select the proper staff person.</p>
<p>Program</p>	<p>Use the dropdown to select the program under which the services of the care plan will be covered. Example: If the client is receiving mental health services under a contract funded by Ryan White funds, select "Ryan White."</p>
<p>Need</p>	<p>If you are accessing the screen after performing a needs assessment, this dropdown list will already be pre-filled. Otherwise, select which need most accurately addresses the care plan.</p>

	If the care plan involves multiple therapies to address the same need, select "Complementary Therapies."
Subneed	Use the dropdown to select the program under which the subneed, or needs related to the primary need, would be covered.
Goal	Enter the overall objective that addresses the client's need. Example: If the client needs housing, the goal might be "Get the client an apartment," or if the client had a substance abuse problem, the goal might be "Treat heroin addiction."
Date Completed	<p>Leave this field empty until the care plan has been completed, all other fields on the screen have been completed, and the outcome has been selected.</p> <p>Once the care plan is completed, enter the date of completion. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Date Completed" field.</p> <p>Do not enter a date in the Date Completed field until you have first selected an outcome. Once you select a Date Completed, the care plan cannot be further edited.</p>
Outcome	<p>Use the dropdown to select an outcome once the care plan is completed.</p> <p>Do not enter a date in the Date Completed field until you have first selected an outcome.</p>

The Outcome dropdown list includes the following:

Completed	The goal was achieved.
Pending	The goal has not yet been achieved and the client's services have not been administered.
Some Progress	The client has partially achieved the goal and is no longer continuing services.
Canceled	The client's services have been halted and their care plan has been cancelled.
Unfunded	The client's services have ended due to lack of funding of the contract or because the contract has expired.
Not available in area	Services necessary to achieve the goal were not available.
Completed Substance Abuse Program	Select if the client's needs are related to substance abuse and the client has completed a rehabilitation program.

Interventions

The lower half of the Care Plan Edit screen lists the interventions of the care plan. Interventions are steps taken to achieve the client's care plan goal. They can include tasks performed internally by staff persons, referrals to other agencies, and services administered by your agency. When you enter a service or referral from this screen, each entry is automatically associated with this care plan.

Reminder: Fill in the Date Completed field last of all on the screen.

Interventions								
Tasks	Assigned to	Date Initiated	Target Date	Follow-Up Date	PSC	Outcome	Outcome Date	
Conduct additional, individual counseling on medical nutrition.	mdj	1/21/2010	2/25/2010					Edit
Bring partner to a medical nutrition counseling session.	mdj	12/15/2009	12/15/2009	2/5/2010		Session conducted	12/15/2009	
Attend next nutrition seminar.	mdj	12/15/2009	1/11/2010	2/5/2010		Completed seminar	1/11/2010	New
Referrals	Refer to	Referral Date	Target Date	Follow-up Date	PSC	Outcome	Outcome Date	
								New
Services	Staff	Date	UOS	Total				New

[Save + Done](#)
[Cancel](#)
[Deactivate](#)

Tasks Section

The tasks table lists the tasks to be performed, as well as the person assigned to the task, the date the task was initiated, the target date of the task's completion, a follow-up date if appropriate, the payment source code, outcome of the test, and the date of the outcome.

To edit a current task, click the **Edit** button to the right of the task. The row for the task is opened in edit mode.

Note: Completed tasks cannot be edited.

To create a new task, click the **New** button. A new task row opens.

Date Need Identified	<input type="text" value="11/4/2017"/>	Date Completed	<input type="text"/>
Staff	<input type="text" value="Admin, Alvin"/>	Outcome	<input type="text"/>
Program	<input type="text" value="Ryan White"/>		
Need	<input type="text" value="Medical Case Management Services"/>		
Subneed	<input type="text" value="Initial Assessment and Plan Development"/>		
Goal	<input type="text" value="Achieve plan objectives for improved health outcomes"/>		

Interventions								
Tasks	Assigned To	Date Initiated	Target Date	Follow-Up Date	PSC	Outcome	Outcome Date	
Medical Provider Referral	Assigned to client	11/4/2017	11/6/2017	12/6/2017				Save Cancel
Referrals	Refer to	Referral Date	Target Date	Follow-up Date	PSC	Outcome	Outcome Date	
Services	Staff	Date	UOS	Total				

Complete the fields as follows:

Tasks	The task related to the care plan. This includes any individual tasks assigned to staff persons and/or clients. This could include a follow-up phone call to the client or their clinician, filling out forms, or coordinating appointments and transportation. Tasks can be used as internal reminders that can be assigned to yourself or other staff persons.
Assigned to	Use the dropdown to select to whom the task is assigned (staff, client or other, e.g., care giver). Example: If a volunteer coordinates all the rides for your agency's van pool, you can assign that staff person to call the client to arrange a pick-up.
Date Initiated	The date the task was initiated. Use the format MM/DD/YYYY. You can also use the pop-up calendar icon.
Target Date	The target date for the task's completion. Use the format MM/DD/YYYY. You can also use the pop-up calendar icon.
Follow-up Date	If the case manager has entered follow-up information, the date when a task's status is revisited. Example: As a case manager you may follow up on a client's care plan biweekly. When you check up on a task, enter the date here. Use the format MM/DD/YYYY. You can also use the pop-up calendar icon.
PSC	Enter the payment source code (if applicable).
Outcome	Enter the outcome of the task in this text field. Example: If the task is coordinating a meal delivery, you might enter, "2 weeks of meals delivered." If this task has not yet been completed, this entry will be blank. Once a care plan outcome has been entered, regardless of whether the goal was reached, it cannot be edited further.
Outcome Date	Enter the date the outcome was achieved. If the outcome has not yet been achieved, the Edit button displays.

When you have finished entering in a task, click the **Save** button to save that row. Or click **Cancel** to return to the Care Plan Edit screen without saving the row.

Referrals Section

This table lists any referrals to other agencies necessary to achieve the client's care plan goal. Click here to go to [Referrals Edit](#) screen help.

To edit an existing referral, click the **Edit** button.

To create a new one, click the **New** button.

Either button takes you to the Referrals Edit screen.

Services Section

The third Interventions table lists any services associated with the client's care plan along with the staff person responsible for the service, the date of the service, the units of service (UOS), and the total cost of the service. For example, if a client's goal is to get a treatment

plan for their HIV symptoms, their medical services and pharmaceutical services would be listed along with the costs.

To enter a new service under Interventions on the Care Plan Edit screen, click the **New** button under Services. This takes you to the [Service Edit](#) screen.

When you enter a new service on that screen and click **Save + Done**, you are taken back to the Care Plan Edit screen. If you click **Save + Done** again on Care Plan Edit, you are taken to the read-only Care Plan screen and the new service you entered is displayed there.













2.11.5 Referrals

Referrals are used to help clients access services that are unavailable at your agency. For example, if your agency specializes in psychosocial counseling, but your client needs medical attention, you can enter a referral to a medically based agency.

- It is important that referrals be recorded, as your agency may be reimbursed for referrals.

To navigate to the Referrals screen from a client's information screen:

- Click the Care Plan tab from the top tier of tabs.
- Then, from the second tier of tabs, click the Referrals tab.

Referrals New				
Date	Service	Target Date	Outcome Date	Outcome
6/1/2016	MCWP > Medical Transportation Services > Medical Transportation Services			
6/1/2016			6/7/2016	Kept appointment 
5/21/2015	Ryan White > Outreach Services > Outreach Services		6/1/2016	Referred to Care  
5/21/2015	Ryan White > Outreach Services > Outreach Services			
5/21/2015	Ryan White > Outreach Services > Outreach Services			
5/14/2015	Ryan White > Outreach Services > Outreach Services			
2/15/2015	Ryan White > Outreach Services > Referral	2/16/2015		
1/5/2015	Ryan White > Outreach Services > Outreach Services		1/28/2015	Referred to Prevention Services  
1/2/2015	Ryan White > Outpatient/Ambulatory Medical Care > Acupuncture		1/20/2015	Kept appointment  

Although you can enter in referrals directly from this screen, best practice is to create a care plan for the client starting with a [needs assessment](#). From there, you can coordinate your own agency's services and tasks with the referral based on the client's overall need.

The screen displays a table of the client's referrals to other agencies.

Date - When the referral was made.

Service - Indicates what type of service the client needed.

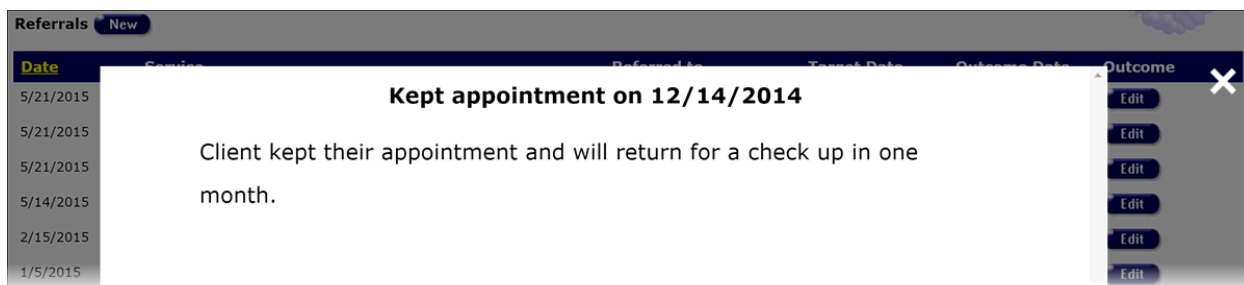
Target Date - Estimated date when the client was to receive the referred services.

Outcome Date - The date when the Outcome was achieved.

Outcome - The outcome of the referral; whether the client attended their appointment with the other agency or not. If an Outcome has been entered, it will appear above the Edit button and if the user entered a Note, a note pad icon will also appear near the outcome.

Referrals New				
Date	Service	Target Date	Outcome Date	Outcome
6/1/2016	MCWP > Medical Transportation Services > Medical Transportation Services			Edit
6/1/2016		6/7/2016		Kept appointment Edit
5/21/2015	Ryan White > Outreach Services > Outreach Services	6/1/2016		Referred to Care Edit
1/5/2015	Ryan White > Outreach Services > Outreach Services	1/28/2015		Referred to Prevention Services Edit
1/2/2015	Ryan White > Outpatient/Ambulatory Medical Care > Acupuncture	1/20/2015		Kept appointment Edit

Hovering over the note pad icon will reveal the contents of the note field. If the message is too long to be viewed in the space revealed by hovering, clicking on the note pad icon will reveal the contents of the note field. Clicking on the 'X' in the upper right hand corner of the screen will close the pop-up note and return you to the Referral read only screen.



To create a new referral:

- Click the **New** button.

To update an existing referral:

- Click the **Edit** button.
- Either action takes you to the [Referrals Edit](#) screen.

Note: For closed referrals, special permissions are required to edit the referral. With permissions enabled, for closed referrals, an outcome (e.g., "Kept Appointment") is displayed beside the Edit button on the read-only Referrals screen.

2.11.6 Referrals Edit

Notes

- Certain features may or may not be available depending on your installation's configuration. Check with your System Administrator for additional information.
- The Needs Assessment Edit, Care Plan Edit and Referrals Edit screens automatically tag Mental Health and Substance Abuse related entries as non-share, regardless of the client's share status. This affects both new and existing Mental Health and Substance Abuse entries and matches the same data confidentiality rules that exist for client services entered into ARIES.
- When you enter a new client a red message appears next to the client's name on the screen. This message reads, "Check the client's CDC Disease Status." ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in

the client intake screens. Once you supply this information, the red message will disappear.

In the Referrals Edit screen, you can enter and edit information for a client referral to another agency. For example, if your agency handles peer advocacy and a client needs employment assistance, which is handled by another agency, you can create a referral for the client. Referrals are important for management of a client's care plan and for referral reimbursements for your agency.

- With the appropriate permission level, you can look up which agencies/providers are in your network via the [Agency Search](#) screen. This may help you select a provider when making a referral.

Rather than create a new referral on Referrals Edit, best practice is to start by creating a [needs assessment](#) to better manage all the tasks and services of the client's needs.

Alias A Adam Referral

Referral Date: 6/10/2015

Referred By: O'Mara, Mike

Program: MAI

Primary Service: Outreach Services

Secondary Service: Outreach Services

Referral Type: Clinic public

Referral Type (other):

Refer To Agency: Shasta Test Services

Refer To Staff: outreachworker, outreachworker

Target Date: 6/19/2015

Follow-Up Date: 6/26/2015

Reason: Referred to Care services

Outcome Date:

Outcome:

Notes:




Save + Done Cancel

Complete the Referrals Edit fields as follows:

<p>Referral Date</p>	<p>Enter the date the referral was made. Use the format MM/DD/YYYY. You can also use the pop-up calendar. Click the calendar icon to bring up the calendar.</p> <p>Popup Calendar -- Webpage Dialog</p> <p>https://aries-int-01.projectaries.org/ARIES/Common/Pop</p> <p>September 2014</p> <table border="1"><thead><tr><th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th></tr></thead><tbody><tr><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr><tr><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td></tr><tr><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td></tr><tr><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td></tr><tr><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td></tr><tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr></tbody></table>	Sun	Mon	Tue	Wed	Thu	Fri	Sat	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11
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	Use the dropdown lists to select the month and year, and then click the specific date to enter it into the text field. The calendar window closes automatically.
Referred By	Select a name from the dropdown, which lists staff for the agency creating the referral.
Program	Use the dropdown to select under which program the needed service would be covered. Example: If the client requires housing assistance, you might select "HOPWA" from the program list. The program you choose affects what displays in subsequent dropdown lists. Example: If you select "Ryan White," only services covered by the Ryan White program will display in the Primary Service dropdown list.
Primary Service	Use the dropdown to select the primary service the client needs. What displays in this dropdown list depends on which program was selected. Example: If the client needs a dental cleaning, select "Oral Health Care." If you do not see the service listed, make sure you have selected the proper program. The primary service you select determines what secondary services display in the next dropdown list. Selecting a primary service activates the Secondary Service dropdown.
Secondary Service	As necessary, use the dropdown to select the secondary service the client requires. Example: If the client needs a dental cleaning, select "Oral Health Care" from the Primary Service dropdown list and "Routine Treatment" from the Secondary Service list.
Referral Type	Select the type of agency or service to which the client is being referred. If it is not listed in the dropdown, select "Other."
Referral Type (other)	If you selected "Other" from the Referral Type dropdown list, enter the type of agency in the text field.
Refer to Agency	Use the dropdown to select the agency the client is being referred to. Some Primary and Secondary Service combinations that are associated with Outreach Services will allow the user to create an intra agency referral For certain Primary and Secondary service categories, you may select your own agency and a Refer to Staff dropdown will appear with a list of all the Outreach Workers at your agency. Referrals made to a staff person at the referring agency will show up on the Outreach Worker dashboard. Note: Deactivated agencies do not appear in the dropdown list.

Refer to Staff	<p>Selecting the user's agency as the Refer to Agency value will cause a Refer To Staff field to appear which is populated with Outreach Worker staff from the user's agency.</p> <p>Intra-agency referrals will show up on the Outreach Worker Dashboard.</p>
Target Date	<p>Enter the expected appointment date. Use the format MM/DD/YYYY. You can also use the pop-up calendar icon.</p>
Follow-Up Date	<p>If you change information in the referral or enter outcome information, enter the date the follow-up was made. Use the format MM/DD/YYYY. You can also use the pop-up calendar icon.</p>
Reason	<p>In this text box, enter the reason the client was referred to another agency. Example: If there were no available counselors at your agency, and the client was sent to another agency, indicate so here.</p>
Outcome Date	<p>When you perform a follow-up to the referral and you have confirmed its outcome, enter the date in this text field using the format MM/DD/YYYY. You can also use the pop-up calendar icon.</p> <p>This field is editable only with the appropriate permissions.</p> <p>In addition, the following business rules must be met in order for the Outcome, Outcome Date and Notes fields to be editable for Share clients:</p> <ul style="list-style-type: none"> • If client is shared AND • User belongs to the 'Referred To' agency AND • User has 'Change' permission for 'Referral Outcome' row AND • User's agency has enrolled the client AND • Referral is also shared (that is, not Mental Health or Substance Abuse, which are NEVER shared) <p>Then allow restricted edit of the three fields, Outcome, Outcome Date and Outcome Notes. Please note that if you enter an Outcome Date, you must also enter an Outcome.</p>
Outcome	<p>When you perform a follow-up to the referral and you have confirmed its outcome, select the result of the referral from the dropdown list. The client either kept the appointment or was a no-show; or the appointment was rescheduled.</p> <p>Once an outcome is entered, only users with appropriate permissions can further edit the outcome. See "Outcome Date" for applicable business rules.</p> <p>Please note that if you enter an Outcome, you must also enter an Outcome Date.</p>

<p>Notes</p>	<p>Enter any additional notes regarding the referral in this text box.</p> <p>Once an outcome is entered, only users with appropriate permissions can enter text in the Notes field. See "Outcome Date" for applicable business rules.</p>
	<p>Click this button to save your input and return to the read-only Referral screen.</p>
	<p>Click this button to return to the read-only Referral screen without saving your input.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is only available to users with the appropriate permission level.</p> <p>Click this button to deactivate the referral. Once deactivated, the referral will no longer appear on the Care Plan screen.</p> <p>Clicking the Deactivate button does not deactivate the client with ARIES; it only deactivates the referral.</p>

2.12 Case Notes

Client case notes are valuable and flexible tools for agencies. Within case notes, you provide information about a client and their services that can be shared within your agency and, in some cases, with other agencies.

Case notes can be used to track a client's progress. For example, if a client had a history of behavior problems with staff persons, a case manager could search their case notes for incidents. There is no expiration on the "Sign and Seal " feature; the note stays in ARIES indefinitely.

Also, if a client's notes are shared, other agencies can get an overview of a client's background if they are a referral. You also have the option not to share case notes with other agencies.

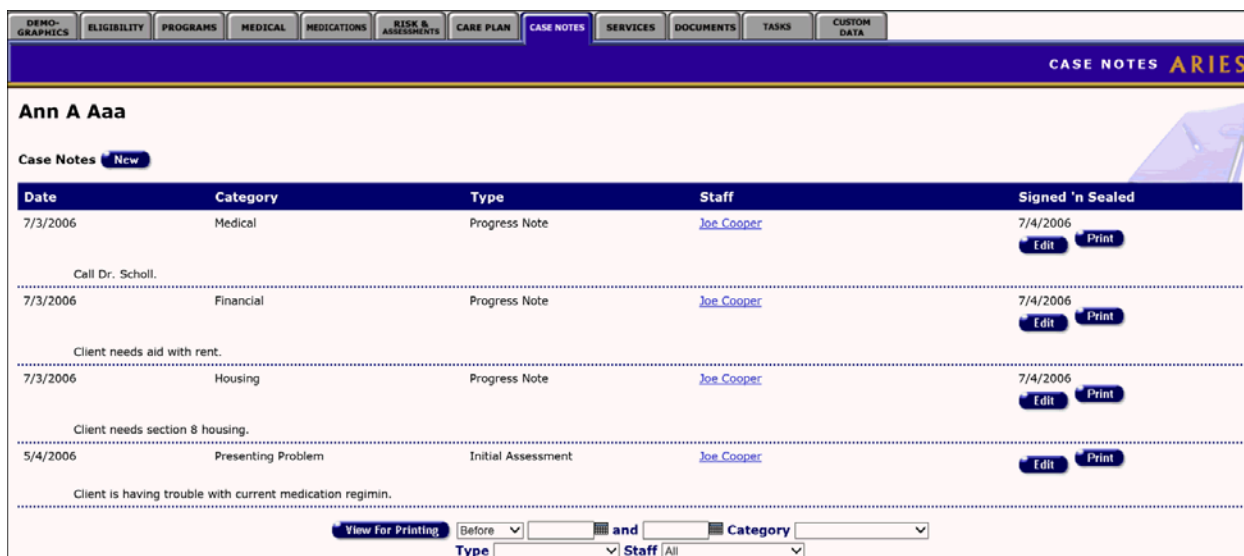
By default, incident reports, legal, substance abuse, and mental health notes are not shared between agencies, even administrative agencies. For a case note to be shared, three conditions must be met:

- The client must be a share client.
- The case note must be signed & sealed.
- The case note must not have the "Don't share" box checked.

Note: Permissions to view or change Signed and Sealed case notes can be enabled or disabled for a given ARIES installation.

To access the Case Notes screen from a client's information screen:

- Click the Case Notes tab on the right of the top tier of tabs.



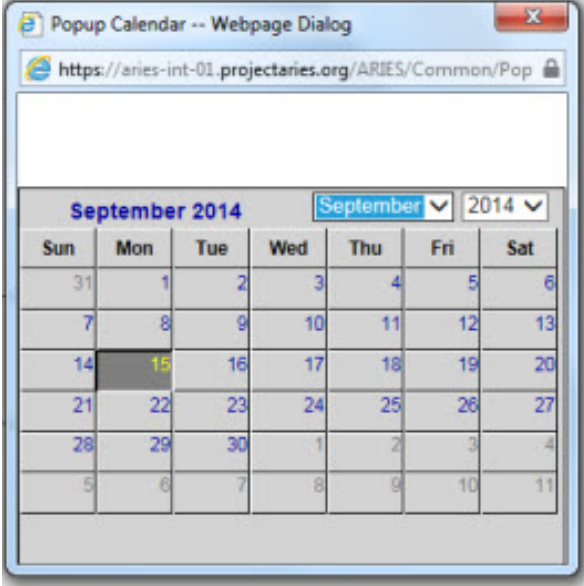
Case notes are presented in a table on the read-only screen. Each row displays information for a paragraph of case notes. The items on this screen are listed by Activity Date (the date the note was recorded or updated), with the most recent activity date record at the top. Case Notes entered on the same date are listed in descending order.

The Case Notes fields are as follows:

Date	The date the case note was entered.
Category	The category of the case note, e.g., financial, legal, health education, etc.
Type	The type of case note, e.g., initial assessment, service assessment, progress report, client update, crisis note, or case conference.
Staff	The staff person who entered the case notes. Clicking on the staff name takes you to the Staff Detail screen.
Signed 'n Sealed	Displays the date when the case notes were completed and sealed. When case notes are sealed, they become visible to other agencies with which the client has agreed to share data. Unsealed notes are visible only to staff persons with the proper permissions within your agency. If you have not yet finalized a client's case notes, the Edit button displays. To view a printable version of a particular case note category, click the Print button next to the Edit button.
Case Note paragraph	The content of each existing case note is shown in a paragraph beneath each table row. <u>Example</u> : In a progress note regarding a client's housing, the note might explain the client's current steps in finding housing and assistance they are receiving.

To Filter Searches for Case Notes



<p>dropdown on left, beneath the View for Printing button</p>	<p>Select "Before" from the dropdown to bring up all case notes before, but not including, the date specified in the first (beginning) date field. Example: Enter the date, e.g. 01/23/2010, in the first text field and leave the second text field empty. This will retrieve all case notes dated before midnight on January 23, 2010.</p> <p>Select "After" from the dropdown to bring up all case notes after the date specified in the first (beginning) date field, including case notes on that day. Example: Entering 12/19/2009 in the first text field and leave the second text field empty. This will retrieve all case notes dated on December 19, 2009 and all the days after it up to the present date.</p> <p>Select "Between" from the dropdown to search a range of dates to bring up all case notes between two specified dates. Enter the beginning date in the first text field and the ending date in the second text field.</p>
<p>Date text fields</p>	<p>Enter the date(s) for your search here. Use the format MM/DD/YYYY, or click the calendar icon to the right of the "Date" field. You can also use the calendar pop-up.</p>  <p>The screenshot shows a "Pop-up Calendar" dialog box. The title bar reads "Pop-up Calendar -- Webpage Dialog". The address bar shows "https://aries-int-01.projectaries.org/ARIES/Common/Pop". The calendar is for "September 2014". The days of the week are listed as Sun, Mon, Tue, Wed, Thu, Fri, Sat. The dates 1 through 30 are visible, with the 15th highlighted in yellow. There are also dropdown menus for "September" and "2014".</p>
<p>Category</p>	<p>Use the dropdown to filter your results by note category or type. Leave the values blank to select by all categories and types.</p>

Type	Use the Type dropdown list to select the kind of case note you are entering: initial assessment, service assessment, progress report, client update, crisis note, or case conference.
Staff	The Staff dropdown defaults to "All" to search the client's case notes from all agencies. To filter your search, use the dropdown. Example: Select "My Agency" to search only the case notes from your agency. To find the notes by a particular staff at your agency, select his/her name from the dropdown.
View for Printing	After you have entered your search filters, click the View For Printing button. ARIES displays your results in a screen formatted for printing without the ARIES menu bar.

Lash L Larue

Date	Category	Type	Staff	Signed 'n
1/20/2010	Adherence	Initial Assessment	System Admin	

Lash may need counseling to help him overcome shame and reluctance to address his health problems from fear of social stigma.

StartDate=1/1/2010; EndDate=3/7/2010 (By everyone, category=Adherence, note type=Initial Assessment)

[Return to Case Notes](#)

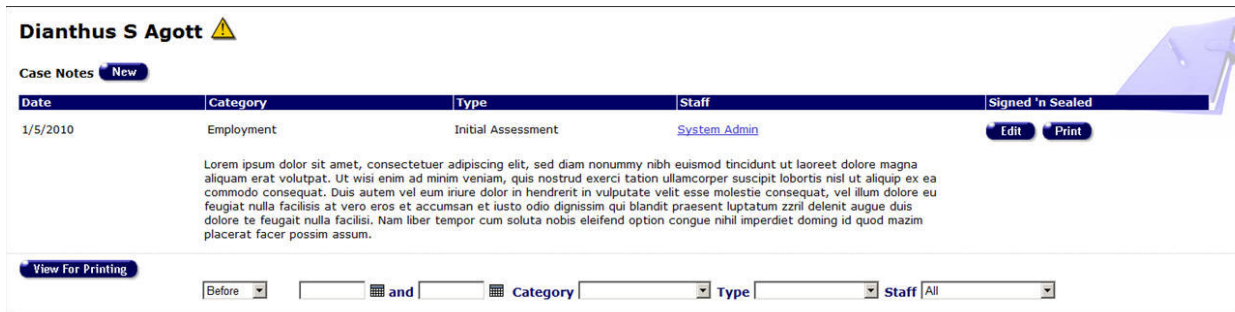
- Click the "Return to Case Notes" link in the lower left corner of search results to return to the previous screen.
- To print a case note, click the **Print** button to the right of the case note.
- To change an unsealed case note, click the **Edit** button on the right of the case note.
- To create a new case note, click the **New** button at the top left of the screen.
- Either action takes you to the [Case Notes Edit](#) screen.

2.12.1 Case Notes Edit

Note: When you enter a new client a red message appears next to the client's name on the screen. This message reads, "**Check the client's CDC Disease Status.**" ARIES needs this minimal information filled out in the Basic Medical subtab, which appears later in the client intake screens. Once you supply this information, the red message will disappear.

ARIES offers case managers flexibility in entering case notes. For example, in an intake, you can enter case notes about the client's medical, financial, and substance abuse status all

from the same screen. ARIES separates the notes into individual, but linked, entries, which saves time and helps organize case notes more efficiently.



Before Entering New Case Notes

Before entering new Case Notes for a client in Edit mode, you must first enter an Activity Date and then make a selection from the Category dropdown list. The Paragraph text box will not accept text until you select from the Category dropdown.

Once you have selected an Activity Date and a Category, click **New** on the Case Notes screen.

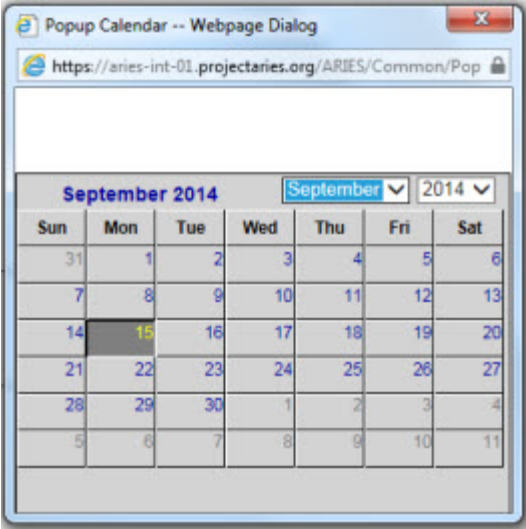
Notes:

- If you attempt to select a Category before entering an Activity Date, you will receive the following error message in red at the top of the screen: **Activity Date is required.**
- If you click **Save** after selecting a category but leaving the Paragraph window blank, the new record will be saved but not the blank paragraph.
- If you do not have Case Notes "Deactivate" permission and you attempt to delete all of the text for a Case Note, you will receive a warning message: **Unable to delete all Case Note text.**

Note: Permissions to view or change Signed and Sealed case notes can be enabled or disabled for a given ARIES installation.

Complete the Case Note Edit fields as follows:

Staff	By default, ARIES lists the name of the is logged-in user. If you are performing data entry tasks, use the Staff dropdown to select the staff person who recorded the case notes, to make sure you select the proper staff person rather than yourself.
Created	The "Created" heading auto-populates with today's date, that is, the date the case note is being created.
Type	Use the dropdown list to select the kind of case note you are entering, e.g., an initial assessment, service assessment, progress report, client update, crisis note, or case conference.
Activity Date	In the text field, enter the date the note was recorded or updated. Use the format MM/DD/YYYY. You can also use the pop-a calendar. Click the calendar icon to bring up the pop-up calendar.



Use the dropdown lists to select the month and year, and then click the specific date to enter it into the text field. The calendar window automatically closes.

If you enter a date in the future, or before 1/1/1980, you will receive the following error message: "Enter a valid Activity Date that is between 1/1/1980 and [today's date]."

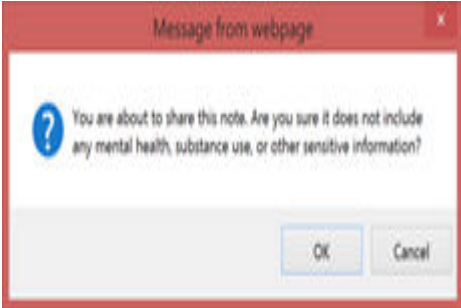
Category

You must first select a category (e.g., Employment, Financial) from this dropdown in order to add or edit a case note entry in the case note text box.



Don't Share checkbox



Check this box to prevent other agencies from viewing a client's notes. If a client has elected not to share their information with other agencies, this will be selected by default.

If the "Do Not Share" box is NOT checked and you try to save a note, a pop up message will appear with the message "You're about to share this note. Are you sure it does not include any mental health, substance use, or other sensitive information."



Select "OK" to save the note, and "Cancel" to go back to the edit screen.

	<p>Note: Regardless of a client's share status, mental health, substance abuse, incident reports and legal case notes cannot be shared with other agencies.</p>
<p>Case Note text box</p>	<p>The case note text box lists all existing case note entries separated by category. Example: If the case note is for an initial assessment, it may list any presenting problems, mental health issues, etc. Each entry is preceded by the category type in brackets.</p> <p>If the case note entry is not shared with other agencies, the bracketed category type also indicates this.</p> <div data-bbox="444 583 1286 751" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <pre>[Presenting Problem] Client depressed. Poor appetite. Bad sleep issues. Lethargic and unmotivated. [Mental Health -- not shared] Will consult with Dr. Bashar about getting a</pre> </div> <p>To edit or add a case note entry, first use the Category dropdown to select which type of case note you want to enter.</p> <p>You can select from service-related categories like "Housing" or "Medical." You can also enter notes about a presenting problem, general impressions, or an incident report.</p>
<p>New Paragraph text box</p>	<p>Enter the body of the new case note for that category in the New Paragraph text box.</p> <p>Example: In an intake, you might first enter any presenting problems. Then, select "Medical" from the Category text field. ARIES enters the presenting problem entry into the case notes text box and creates a blank entry for medical notes.</p>
<p>After you have finished entering case notes information, click on one of the following:</p>	
	<p>Click the Save button to save your input and return to the Case Notes screen.</p> <p>Note: Only those within your agency with the proper permissions will be able to view the case notes you entered.</p>
	<p>To finalize your case notes and make them available to other agencies (if the client has agreed to share their data), enter your login password in the "Password to sign and seal note" text field and click the Sign 'n Seal button.</p> <p>If case notes are not shared, they can only be viewed within your agency.</p>

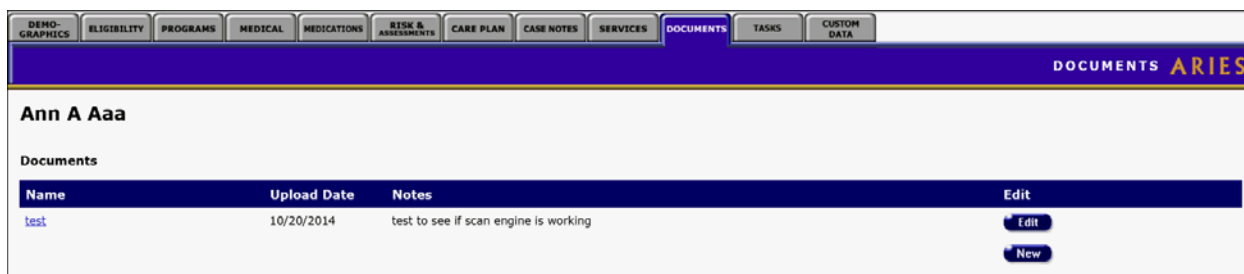
	Once case notes have been sealed, they cannot be edited or deactivated. There is no expiration on the "Sign and Seal" feature; the note stays in ARIES indefinitely.
	Click the Cancel button to return to the Case Notes screen without saving your input.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>A case note may be activated if it is not signed and sealed. This option is only available to users with the appropriate permission level.</p> <p>Note: If you do not have Case Notes "Deactivate" permission and you delete all of the text for a Case Note, ARIES displays a warning message: "Unable to delete all Case Note text."</p> <p>Click this button to deactivate the case note. Once deactivated, the case note will be hidden and will no longer appear on the Case Notes screen. The data will not be deleted, but it will no longer be accessible.</p> <p>Clicking the Deactivate button does not deactivate the client with ARIES; it only deactivates the case note. Only ARIES administrators can reactivate records.</p>

2.13 Documents

If you have appropriate permissions, you can use the Documents screen to upload documents for the client, such as a Medical Certification Form.

Uploaded documents are associated with records for specific clients.

- Click the **Documents** primary tab.
- Click **New** to display the [Document Upload Edit](#) screen.



Ann A Aaa

Documents

Name	Upload Date	Notes	Edit
test	10/20/2014	test to see if scan engine is working	<input type="button" value="Edit"/> <input type="button" value="New"/>

2.13.1 Document Upload Edit

Adam A Alias Document Upload Edit

Client Name

Client Alias, Adam

Document Name

Description

Document to upload

Complete the fields as follows:



Client Name	Use the dropdown to select how you want to identify the client. Options are: Client Name, Agency Client ID, ARIES ID and Program Client ID.
Document Name	Enter the name of the document to be uploaded.
Description	Enter the description of the document to be uploaded.
Document to upload	Click Browse to navigate to the document to be uploaded.

Note: Current upload limits are as follows:

- Maximum file size: 200 KB.
- Document types allowed: .doc, .docx, .pdf.

In addition, as determined by your ARIES installation, you will receive a warning message when you reach the limit for number of documents to upload and number of documents to attach to the client's eligibility record.

After you have completed your entries:

	Click this button to save your entries and return to the read-only Documents screen.
	Click this button to return to the read-only Documents screen without saving your entries.

When you save the uploaded document, it is listed on the read-only Documents tab. You can click on the link to open the uploaded document, save it to your computer, or save it with a different file name.

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

DOCUMENTS ARIES

Ann A Aaa

Documents

Name	Upload Date	Notes	Edit
test	10/20/2014	test to see if scan engine is working	<input type="button" value="Edit"/> <input type="button" value="New"/>

2.14 Custom Data Entry

The Custom Data tab displays any Custom Data Groups and fields that have been created for your agency by an administrator for an Admin Agency or Partner Agency. Custom Data created at the AA level is available to all agencies managed by the AA. Custom Data created at the Partner level is available to all agencies. The Custom Data function offers users power and flexibility, for example by supporting multiple non-longitudinal and multiple longitudinal data elements, as well as for multiple data types.

Only users with Custom Date Entry View permission can access this tab. Only users with Custom Data Entry Create permission can add new records. Only users with Custom Data Entry Change permission can edit existing records.

Below are examples of ways end users can use Custom Data fields that have been set up for their agency. These examples are not intended to exhaust the possibilities of Custom Data.

As an example of Custom Data, this tab for a client might display special fields in groups labeled Agency Specifics, Demographics, Financial, and Medical History.

Notes

- Difference between Longitudinal and Non-Longitudinal groups on this screen: If the **Edit** button is displayed next to the name of the group, the group is non-longitudinal (only one record per client). If the **Edit** button is shown next to a row of data (such as the Medical History section), then the Data Group is longitudinal (multiple records per client).
- Client data on Duplicate Merge screens: Custom data for clients will not appear on client-data screens in Duplicate Merge. The data is automatically merged based on the last saved date.

Click **New** to create a new record for the client in a given category, such as Satisfaction Survey. Click **Edit** to update an existing record.

Complete the resulting Edit screen as indicated. Click **Save** to store your changes or **Cancel** to discard them and return to the read-only Custom Data tab.

Visit Date	Physician	Wait-Time (Minutes)	Satisfaction Score	Comments	
5/27/2010	Dr. Jones	10	9	Doctor was very pleasant and provided me with several referrals.	Edit
7/19/2009	Dr. Smith	75	2	Long wait, doctor was rushed, did not answer my questions.	Edit

Another example illustrates the differences between longitudinal and non-longitudinal records displayed on the Custom Data tab. Non-longitudinal records (e.g., the Education Level group) are displayed in separate rows. Longitudinal records (e.g., the Satisfaction Survey group) are displayed as rows in a data grid. You would click **Edit** to update a row in the grid, or **New** to create a new row of longitudinal data in the grid.

In this example, you would click the applicable **New** button to create a longitudinal record for the client in Fasting Lipids or Satisfaction Survey. To edit one of the existing longitudinal records, you would click the adjacent **Edit** button and complete the resulting Edit screen as indicated; then click **Save** to store your entries or **Cancel** to discard them and return to the read-only Custom Data tab.

Reminder: These are examples only, to illustrate the capabilities of Custom Data. Actual tabs and Edit screens will be tailored to the needs of your agency.

Section 3

3 Staff

All client services are administered by staff, which may include clinicians, receptionists, volunteers, administrators, and case managers.

It is important that every staff person at your agency, whether full-time, part-time, or volunteer, be added to ARIES, even if they do not directly use ARIES. Once a staff person is in the system you can ascribe services to them and enter case notes for them.

To change or create staff records other than your own, you must have the proper Administrative permissions. The staff screens allow you to search for staff at your agency, see all their contact information and, with the proper permissions, edit their preferences and permissions.

The most common tasks include:

- [Changing Your Preferences](#)
- [Changing Your Password](#)
- [Adding a New Staff Person](#)

The staff screens include:

- [Staff Search](#)
- [Staff Search Result](#)
- [Staff Detail](#)
- [Staff Edit](#)
- [Staff Permissions](#)
- [Editing Permissions](#)

3.1 Working with Staff in ARIES

When entering new staff information, try to be as complete as possible, which will help others to search the staff records more accurately. Avoid using nicknames and initials for first names.

The most common tasks include:

- [Changing Your Preferences](#)
- [Changing Your Password](#)
- [Adding a New Staff Person](#)

3.1.1 Changing Your Preferences

All of the personal information for your account is held in your preferences and can always be edited by you. Follow the steps in this Help topic to edit your preferences. To change your password, refer to [Changing Your Password](#).

If you need to change your permissions for additional user capabilities in ARIES, please contact an ARIES administrator or ARIES support provider.

1. From the [ARIES menu bar](#) at the top of the ARIES screen, choose Find > Staff to get to the [Staff Search](#) screen.
2. Enter your first and last name in the corresponding text fields.
3. Click the **Search** button, which will take you either to your [Staff Detail](#) screen or the [Staff Search Result](#) screen. If you are taken to the Staff Search Result screen, click your name to get to your Staff Detail screen.
4. From the Staff Detail page, click the **Edit** button.

The screenshot shows the 'Staff Edit' form with the following fields and values:

- Last Name: Admin
- First Name: Addison
- Title: Agency ARIES Administrator
- Employment: Full Time (dropdown), FTE (input)
- Phone: (input)
- Fax: (input)
- Email: (input)
- Primary Site: Health and Hope Headquarters (dropdown)
- Initials/Short name: AA
- Home Page: Staff Search (dropdown)
- ARIES Login: AAddison
- Challenge Question: In what city did you meet your spouse/significant other?
- Challenge Answer: Fresno
- Force New Password on Next Login: (checkbox)
- Buttons: Save, Cancel

5. In the Staff Edit screen, enter any new information. For a detailed description of the fields please see [Staff Edit](#) help.
6. Click the **Save** button to keep your changes. To discard your entries, click the **Cancel** button, which will take you back to the Staff Detail screen.

If you need to change your permissions to access more capabilities in ARIES, please contact an ARIES administrator or ARIES support provider.

3.1.2 Changing Passwords

View [Changing your own password](#)

View [Changing another user's password](#)

Notes

- *Password for Those Leaving an Agency:* The Admin should immediately change the ARIES password of any staff person leaving the agency. Then technical leads should contact their Admins to have the user's digital certificates revoked.
- Do not delete staff out of ARIES when staff leave an agency. Username is attached to client records in ARIES and other users need to be able to access/edit past users' records.
- If you have forgotten your own password, please contact an ARIES administrator to reset it.
- To edit the password of a staff person other than yourself, you must have the proper Administrator permissions.
- To edit staff persons from another agency, you must administer that agency and have the proper Administrator permissions.

Changing your own password

From the ARIES menu bar at the top of the ARIES screen, choose **Find > Staff** to access the Staff Search screen.

- Enter your last name and first name in the corresponding text fields.
- Click **Search**.
- Either your Staff Detail screen or the Staff Search Result screen will display. If you are taken to the Staff Search Result screen, click on your name to display your Staff Detail screen.
- From the Staff Detail page, click **Change Password**. The Staff Change Password screen displays.

Staff Change Password

Old Password

New Password



Confirm Password

Challenge Question

Challenge Answer

Complete the fields as follows:

Old Password	Enter your current password. Note: If you have forgotten your password, contact an ARIES administrator to reset it.
New Password	Enter your new password. Note: Your new password is case-sensitive and must be 6-32 characters long. It must include: <ul style="list-style-type: none"> • At least one upper case character • At least one lower case character • At least one number • At least one special character (except for the \$, %, ^, and *) • Special characters including . , - ' & ! @ # () / : . are accepted. Example: "Rover7" is not an acceptable password, but "Rover7@" or "#2roVer9" is.
Confirm Password	Re-enter your new password exactly as you entered it above.
Challenge Question	Use the dropdown to select a question you can remember the answer to in case you forget your password.
Challenge Answer	Enter the answer to your challenge question.

	Click Save to save your changes and return to the Staff Detail screen.
	Click Cancel to return to the Staff Detail screen without saving your changes.

Changing another user's password

Note: This procedure is available only to users with Admin permissions.

Reminder: Immediately change the password of any staff person leaving the agency. Do not delete the staff person from the ARIES database.

From the ARIES menu bar at the top of the ARIES screen, choose **Find > Staff** to access the Staff Search screen.


- Enter the user's last name and first name in the corresponding text fields.
- Click **Search**.
- Either the user's Staff Detail screen or the Staff Search Result screen will display. The Staff Search Result screen indicates that there is more than one user with the same name. If you are taken to the Staff Search Result screen, click on the appropriate name to display the user's Staff Detail screen.
- From the Staff Detail page, click **Change Password**. The Staff Change Password screen displays. Note that it displays less detail than the screen for changing your own password.

Staff Change Password



New Password

Confirm Password

Force New Password on Next Login




<p>New Password</p>	<p>Enter a new password for the user.</p> <p>Note: Passwords are case-sensitive and must be 6-32 characters long. It must include:</p> <ul style="list-style-type: none"> • At least one upper case character • At least one lower case character • At least one number • At least one special character (except for the \$, %, ^, and *) • Special characters including . , - ' & ! @ # () / : . are accepted. <p>Example: "Rover7" is not an acceptable password, but "Rover7@" or "#2roVer9" is.</p>
----------------------------	--

Confirm Password	Re-enter the new password exactly as you entered it above.
Force New Password on Next Login	Checking this box forces the user to change his/her password on next login.
	Click Save to save your changes and return to the Staff Detail screen.
	Click Cancel to return to the Staff Detail screen without saving your changes.

3.1.3 Adding a New Staff Person

Notes:

- To add a new staff person, you must have the proper Administrator permissions.
- The following rule applies to assignment of a new staff member to a User Group: "Administrative Agency ARIES Administrator" cannot be assigned to a user unless their agency's Agency Type is "Administrative Agency" or "Super AA."
- **Reminder:** Security logic prevents user from granting rights that they themselves do not have. For example, if you have no permission to access the ReportExport application, you cannot grant that permission to someone else.

From the [ARIES menu bar](#) at the top of the ARIES screen, select **New > Staff** to display the Staff Search screen.

Staff Search


Search for staff at your agency. You may use the wildcard *.
Before creating a new staff member, ARIES must search your agency for existing staff members with the same or similar first and last names.

Last Name

First Name

Primary Role


Display



Before adding a new staff person, search for their name in ARIES to avoid duplicate entries. You may search for any staff person at your agency.

Complete the fields as follows:

Last Name	Enter the last name of the staff person.
------------------	--

First Name	Enter the first name of the staff person. Do not use initials, e.g., "Mary J."
Primary Role	Use the dropdown to select the primary role of the staff person. To narrow your search in a large agency, select the staff person's primary role from the dropdown list. You can also use the primary role dropdown list without entering any first or last name criteria to find all the staff persons who perform a particular function.
Display	This field refers to the number of records to be displayed. No entry is needed if you are creating a new staff person.
	Click the Search button after making all necessary entries.

- Click the **Search** button. If more than one result is found, the results appear in the Staff Search Result screen. For details, refer to the "[Client Search Result](#)" section.
- If an exact match is found, that person's [Staff Detail](#) screen will display.
- If no records are found, the Staff Search screen displays again with the message "**No records found. Try broadening your search.**" A **New Staff** button also appears.

Staff Search

• No records found. Try broadening your search.



**Search for staff at your agency. You may use the wildcard *.
Before creating a new staff member, ARIES must search your agency for existing staff members with the same or similar first and last names.**

Last Name

First Name

Primary Role

Display

If the name you are searching for does not appear in the Staff Search Result screen, click the **New Staff** button to display the Staff Edit screen.

Note: This button will only be visible if you have permission to create a new staff person.


Staff Edit




<p>Agency <input type="text" value="Shasta Services"/></p> <p>Last Name <input type="text"/></p> <p>First Name <input type="text"/></p> <p>Title <input type="text"/></p> <p>Employment <input type="text" value=""/> <input type="text" value=""/> FTE</p> <p>Phone <input type="text"/></p> <p>Fax <input type="text"/></p> <p>Email <input type="text"/></p> <p>Primary Site <input type="text"/></p> <p>Notes <input type="text"/></p>	<p>Initials/Short name <input type="text"/></p> <p>Home Page <input type="text"/></p> <p>ARIES Login <input type="text"/></p> <p>Password <input type="text"/></p> <p>Confirm Password <input type="text"/></p> <p>User Group <input type="text"/></p> <p>Challenge Question <input type="text"/></p> <p>Challenge Answer <input type="text"/></p>
---	--

Force New Password on Next Login

Complete the fields as follows.

Agency	Use the dropdown to select the staff person's agency.
Last Name	Enter the last name of the staff person.
First Name	Enter the first name of the staff person. Do not use initials, e.g., "Mary J."
Title	Enter the title of the staff person, if appropriate.
Employment	Use the dropdown to select whether the staff is Full Time, Part Time or Volunteer.
FTE (Full Time Equivalency) field	For full-time staff enter 1 as the Full Time Equivalency (FTE). For part-time and volunteer staff, enter the proportion of the FTE as a number between 0 and 1 in the text field. Example: If the staff person works half time, enter ".5" in the text field.
Phone	Enter the primary phone number of the staff person, including area code. Use the format 123-456-7890. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345
Fax	Enter the fax number of the staff person, including area code. Use the format 123-456-7890.
Email	Enter the email address of the staff person.
Primary Site	If your agency has more than one site, use the dropdown list to select which location will be the staff person's primary work site.
Initials/Short name	Enter an abbreviated version of the staff person's name. Example: For Mary Jones, you might use "MJ." This short name will be used in screens where the full name might not fit correctly.

<p>Home Page</p>	<p>Use the dropdown to select the screen that will appear when the staff person logs in. The default screen is the ARIES welcome screen.</p> <p>Select the home page that the staff person will visit most frequently. Example: If the staff person primarily enters new service data, then set the home page to the New Service screen.</p>  <p>If you are adding a Non-User staff person, select "Non-User" from the dropdown.</p> <p>Important Note: Once you select Non-User, the ARIES Login, Password, Confirm Password, and User Group fields are removed from the screen as these fields are not required.</p>
<p>ARIES Login</p>	<p>Enter the staff person's login ID.</p> <p>Note: The login ID must be from 8-32 characters in length and must use only letters and numbers. Example: "maryj" is not an acceptable login, but "maryjones" or "maryj222" is. The login ID is not case sensitive.</p>
<p>Password</p>	<p>Enter the staff person's new password.</p> <p>Note: The new password is case-sensitive and must be 6-32 characters long. It must include:</p> <ul style="list-style-type: none"> • At least one upper case character. • At least one lower case character. • At least one number. • At least one special character (except for the \$, %, ^, and *). • Special characters including . , - ' & ! @ # () / : . are accepted. <p>Example: "Rover7" is not an acceptable password, but "Rover7@" or "#2roVer9" is.</p>
<p>Confirm Password</p>	<p>Re-enter the new password exactly as you entered it above.</p>
<p>User Group</p>	<p>Use the dropdown to select the appropriate user group for the staff person (e.g., Data Entry, Medical, Volunteer).</p>

Challenge Question	This field is not activated except for users updating their own preferences.
Challenge Answer	This field is not activated except for users updating their own preferences.
Notes (text box)	Enter any relevant notes.
Force New Password on Login (checkbox)	Check this box if you want ARIES to force selection of a new password on the user's next login. The user will then be prompted to create and confirm a new password before entering the system.
	Click the Save + Next button to the Staff Permissions screen, where you may customize permissions.
	Click Save + Done to complete adding this staff person and go to the Staff Detail screen, which will display your new entries in read-only mode.
	Click Cancel to discard all entries and return to the Staff Search screen. Note: You are not prompted to confirm a cancellation.

Staff Persons Entered at Another Agency

- If a staff person is already entered at another agency, you must enter a new record for them at your agency.

Staff Persons Reassigned or Working at Two Different Agencies

- If a staff person is reassigned or is working at two different agencies, they must have a separate record at each agency.

3.2 Staff Screens

To access the staff screens, start by accessing the [Staff Search](#) screen. From the [ARIES menu bar](#), select **Find - Staff**. From there, you can access the screens that allow you to search for staff at your agency, see all their contact information, and edit their preferences and permissions.

The staff screens include the following. Click on a link for details.

- [Staff Search](#)
- [Staff Search Result](#)
- [Staff Detail](#)
- [Staff Edit](#)
- [Staff Permissions](#)
- [Editing Permissions](#)

3.2.1 Staff Search

From the [ARIES menu bar](#) at the top of the ARIES screen, select **Find > Staff** to reach the Staff Search screen. Note that this search screen is also displayed as the first step in creating a new staff person.

Staff Search

Search for staff at your agency. You may use the wildcard *.
Before creating a new staff member, ARIES must search your agency for existing staff members with the same or similar first and last names.

Last Name

First Name

Primary Role

Display

Most ARIES search screens present you with several filter options. For example, in a staff search, your filters include first and last names and primary role. Keep in mind that the more filters you add, the narrower your search results. Conversely, if you leave all filter fields empty, ARIES will return all records that pertain to the search.

Before entering a new staff person, search for their name in ARIES to avoid duplicate entries. You may search for any staff person at your agency.

Complete the fields as follows:

Last Name	Enter the last name of the staff person.
First Name	Enter the first name of the staff person. Do not use initials, i.e., "Mary J."
Primary Role	Use the dropdown to select the primary role of the staff person. To narrow your search in a large agency, select the staff person's primary role from the dropdown list. You can also use the primary role dropdown list without entering any first or last name criteria to find all the staff persons who perform a particular function.

- Click the **Search** button. If more than one result is found, the results appear in the Client Search Results screen. For details, refer to the [Staff Search Result](#) section.
- If an exact match is found, that person's Staff Detail screen will display.
- If no records are found, the Staff Search screen displays again with the message "No records found. Try broadening your search."

Staff Search

- No records found. Try broadening your search.

Search for staff at your agency. You may use the wildcard *.
Before creating a new staff member, ARIES must search your agency for existing staff members with the same or similar first and last names.

Last Name	<input type="text" value="Cook"/>
First Name	<input type="text" value="Captain"/>
Primary Role	<input type="text"/>
Display	<input type="text" value="20"/>

- If you are unsure about the spelling of a name, you can try using the wildcard "*" (asterisk). Example: If you enter "Mac*" in the last name field, the search will return all last names and all "Also Known As" names that begin with "Mac."
- If you are having trouble finding a staff person, try reducing or changing your search criteria. The quickest way to get results is to type the first few letters of the staff person's last name followed by "*" and selecting from the resulting matches. Many people use nicknames as first names, so searches using first names are not as reliable.

To Specify the Number of Results

You can specify the number of results to return on your search; the more results you ask for, the longer the search takes. The default is set at 20, which will typically fill the results screen.

- To increase or decrease the number of results displayed in the search screen, place your cursor in the Display field and type a number.

To Search Other Agencies

If you are at an administrative agency, you may search for clients at all the agencies you administer.

3.2.2 Staff Search Result

When you click the **Search** button on the [Staff Search](#) screen, ARIES looks up all the staff persons who match all your criteria and then displays them on the Staff Search Result screen. If there is only a single result for your search, you are taken to the [Staff Detail](#) screen.

Staff Search Result				
Staff Name	Agency	Title	Phone	Email
Andrade, Melissa	Clear View Mission	Trainee		
Brown, Deborah	Clear View Mission			
Brown, Stephanie	Clear View Mission	Trainee		

3 records displayed

3 records displayed

- The search results are listed in alphabetical order by staff name. Also listed are the name of the staff person's agency, the staff person's title, phone and email.
- Click on a name to display that individual's [Staff Detail](#) screen.
- Click on an agency to display the [Agency Info](#) screen.
- Click an email address to open a new email addressed to the staff person in your computer's default email program.
- To change the number of items displayed, enter a new number in the Display field. Click **Display** to refresh your screen with the new number of results to be displayed.
- If none of the results match the staff person you are searching for, do a new search by clicking the **New Search** button and entering different criteria.
- If you are sure that the staff person is not enrolled at your agency, you can create a new staff person if you have the proper Administrative permissions. Click the **New Staff** button, which takes you to the [Staff Edit](#) screen. See [Adding a New Staff Person](#) for details.

3.2.3 Staff Detail

From the [Staff Search Result](#) screen, click on a name to get to the Staff Detail screen, which contains a staff person's personal information (agency, primary site, address, phone number and email address).

Addison Admin

Agency [ARIES Administrator](#)
[Health and Hope](#)
 Primary Site: [Health and Hope Headquarters](#)
 1000 Strong Way
 Maynard, CA 94520

- Click the agency link to display the [Agency Info](#) screen.
- Click the email address to open a new email message addressed to the staff person in your computer's default email program.

Note: You always have permission to change your own preferences. To edit staff persons other than yourself, you must have the proper Administrator permissions. To edit staff persons from another agency, you must administer that agency and have the proper Administrator permissions.

If you do not see the **Edit** or the **Edit Permissions** button then you do not have the necessary permissions to make changes.

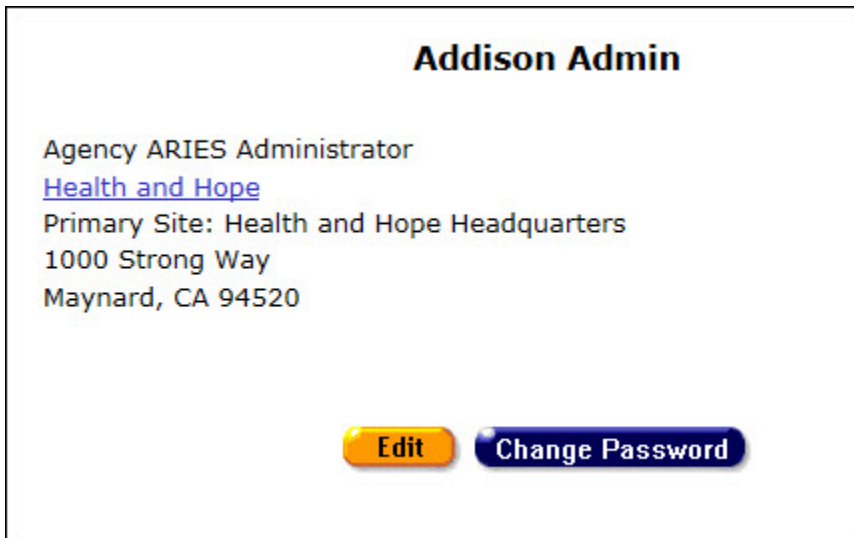
- **Edit** - Click the **Edit** button to display the [Staff Edit](#) screen.
- **Edit Permissions** - Click the **Edit Permissions** button to display the [Staff Permissions](#) screen.
- **Change Password** - Click the **Change Password** button to display the [Staff Change Password](#) screen.

3.2.4 Staff Edit

Editing Your Personal Preferences

To locate your personal preferences, from the [ARIES menu bar](#) at the top of the ARIES screen, choose **Find > Staff** to access the [Staff Search](#) screen.

- Enter your last name and first name in the corresponding text fields.
- Click **Search**.
- Either your Staff Detail screen or the Staff Search Result screen will display. If you are taken to the Staff Search Result screen, click on your name to display your Staff Detail screen.



- From the Staff Detail page, click **Edit**.
- Your Staff Edit page displays.

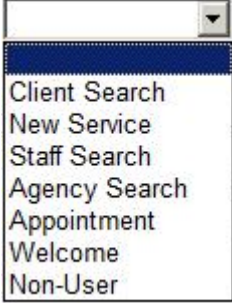
Staff Edit

Last Name	<input type="text" value="Admin"/>	Initials/Short name	<input type="text" value="AA"/>
First Name	<input type="text" value="Addison"/>	Home Page	<input type="text" value="Staff Search"/>
Title	<input type="text" value="Agency ARIES Administrator"/>	ARIES Login	<input type="text" value="AAddison"/>
Employment	<input type="text" value="Full Time"/> <input type="text" value="FTE"/>		
Phone	<input type="text"/>		
Fax	<input type="text"/>		
Email	<input type="text"/>		
Primary Site	<input type="text" value="Health and Hope Headquarters"/>	Challenge Question	<input type="text" value="In what city did you meet your spouse/significant other?"/>
Notes	<input type="text" value=""/>		



Force New Password on Next Login

To enter new information or change your preferences, complete the fields as follows.

First Name	Enter your first name of the staff person. Do not use initials, e.g., "Rhetta A."
Last Name	Enter your last name.
Title	Enter your title if appropriate, e.g., Coordinator.
Employment	Use the dropdown to select your type of employment, e.g., Full Time, Part Time or Volunteer.
FTE (full-time equivalent) box	For full-time staff, enter 1 as the FTE. For part-time and volunteer staff, enter the proportion of the FTE as a number between 0 and 1 in the accompanying text field. Example: If the staff person works half time, enter ".5" in the text field.
Phone	Enter your primary phone number, including area code. Use the format 123-456-7890. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345
Fax	Enter your fax number, including area code. Use the format 123-456-7890.
Email	Enter your email address.
Primary Site	If your agency has more than one site, use the dropdown to select which location is your primary work site.
Challenge Question	Use the dropdown to select a challenge question for use in case you need to confirm your identity with an administrator, for example if you forget your ARIES password.
Challenge Answer	Type your answer to the challenge question.

Initial/Short name	Enter an abbreviated version of your name. Example: For Mary Jones, you might use, "MJ." This short name will be used in screens where your full name might not fit correctly.
Home Page	<p>Use the dropdown to select the screen that will appear when you log in. The default screen is the ARIES welcome screen.</p>  <p>Select the home page that you will visit most frequently. Example: If you primarily enters new service data, then set the home page to the New Service screen.</p>
ARIES Login	Enter your login ID. The login ID is not case-sensitive.
Notes textbox	Enter any relevant notes.
Force New Password on Next Login	Check this box if you want ARIES to force selection of a new password on the user's next login. The user will then be prompted to create and confirm a new password before entering the system.

When you have completed your entries:

	Click Save to save your entries and return to the Staff Detail screen.
	Click Cancel to discard all entries and return to the Staff Detail screen.

Editing the Preferences of a Staff Person Other Than Yourself

- To edit staff persons other than yourself, you must have the proper Administrator permissions.
- To edit staff persons from another agency, you must administer that agency and have the proper Administrator permissions.
- A user cannot be assigned to the "Administrative Agency ARIES Administrator" user group unless their agency's Agency Type is "Administrative Agency" or "Super AA."

3.2.5 Staff Permissions

Owing to the strictly confidential nature of its work and that of its member agencies, ARIES employs extensive security measures to protect client data. Accordingly, staff persons preserve client trust through their use of ARIES.

A staff person newly entered into the ARIES system is assigned to an initial role or user group, which determines their default permissions. Permissions are rights to view, change, create or deactivate records as appropriate for the type of work a user performs in the system. The default permissions for the groups or roles are created by the ARIES Administrator. But in many cases, individuals may need more or fewer permissions than the default for their group. As appropriate for the staff people at your agency, an Admin can add to or remove from the default permissions with this screen.

Staff members cannot edit their own permissions; those with the proper permissions control the details of a user's access to the system via updates on the Permissions screens in the Client application.

Important Notes

To Inactivate Staff: Dropdowns that display a list of Staff will display only active staff.

- Do *not* use the **Deactivate** button to remove inactive staff from ARIES. Edit the permissions of inactive staff in ARIES by changing the user group role to "Inactive." This role has no checkmarks on the user permissions screen, and hence no access to ARIES. It is not necessary to change the ARIES password of any staff person leaving the agency.
- Follow your agency's established procedures covering staff departures.

Password for Those Leaving an Agency:

- Do not deactivate staff in ARIES when staff leave an agency. Username is attached to client records in ARIES and other users need to be able to access/edit past users' records.

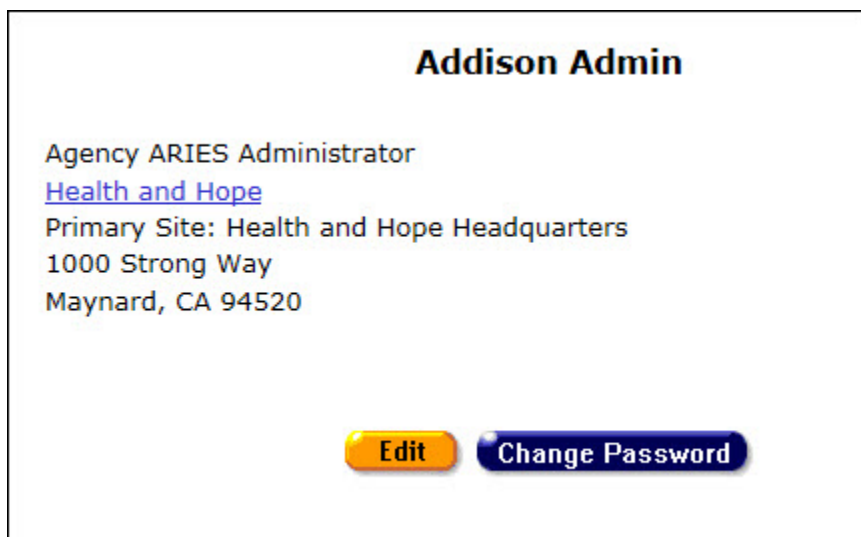
Permission-Based Actions: Staff persons can view, change and create records in ARIES based on their own permissions. ARIES administrators can change these privileges on the Staff Permissions screen. As an Admin changing a staff person's permissions, be sure not to give the individual more permissions than needed for the job.

Agency Emulation Mode: ARIES has an "Agency Emulation Mode" feature whereby Administrative Agencies (AA's) and Partners can login as themselves, but work interactively within the Client application as if they were logged in as a provider-agency user. Therefore it is not necessary for AA's to have many different logins and certificates in order to review the data of the provider agencies they manage. The Agency Emulation functionality does not require additional user permissions. For access to this functionality, the user need only be a staff member of an administrative or partner agency.

Permissions Hierarchy: There is a hierarchy within each row of permissions. Some examples are:

- Granting Change permissions also implies granting View permissions (you cannot Change a record unless you can first View it), and when you place a checkmark in the Change box, ARIES will automatically place a checkmark in the View box (if not already checked).
- Granting Create permissions implies View permissions, and granting Deactivate permissions implies View, Change and Create permissions.
- Revoking View permissions also revokes Change, Create, and Deactivate permissions.

To access a staff person's permissions, start by performing a staff search. From the Staff Detail screen, click the **Edit Permissions** button.



Clicking the **Edit Permissions** button takes you to the Staff Permission Edit screen. Click [here](#) for details on using that screen.

Click here to view the help topic [Special Notes on Selected Permissions](#).

3.2.6 Editing Permissions

Click to view the special section on [Custom Data User Permissions](#).

Click to view the help topic [Special Notes on Selected Permissions](#).

Note on Inactive Staff (Removed from Dropdowns): Most dropdowns that display a list of Staff will display only active staff.

- Managers or technical leads should not use the Deactivate button to remove inactive staff from ARIES. Rather, they should immediately edit the permissions of inactive staff in ARIES by changing the user group role to "Inactive." This role has no checkmarks on the user permissions screen, and hence no access to ARIES.
- Contact your ARIES support provider to complete the Inactivation process and ensure the inactive user's access is revoked.

Permission-Based Actions: Staff persons can view, change and create records in ARIES based on their own permissions. In addition, ARIES administrators can also deactivate records in ARIES. ARIES administrators can change these permissions on the Staff Permissions screen. As an Admin changing a staff person's permissions, be sure not to give the individual more permissions than needed for the job.

Agency Emulation Mode: ARIES has an "Agency Emulation Mode" feature whereby Administrative Agencies (AA's) and Partners can log in as themselves, but work interactively within the Client application as if they were logged in as a provider-agency user. Therefore it is not necessary for AA's to have many different logins and certificates in order to review the data of the provider agencies they manage. The Agency Emulation functionality does not require additional user permissions. For access to this functionality, the user need only be a staff member of an administrative or partner agency.

Case Notes Permissions: The staff permissions screen displays several lines of permissions for Case Notes. These determine whether users can view, change or create various types of notes (legal, mental health, etc.). The last line under Case Notes is Sign and Seal, which has only two active checkboxes: View and Change. The View permission determines whether the user can Sign and Seal a note. Essentially, View determines whether the user can view the box (that is, enter a password in the password field) and button for Sign and Seal. The Change permission determines whether the user can edit a note even AFTER it has been Signed and Sealed.

Note: Permissions to view or change Signed and Sealed case notes can be enabled or disabled for a given ARIES installation.

Special Notes on Agency Specifics Permissions

- For ARIES users with Agency Specifics *Change* permission, the **Edit** button is displayed on the Agency Specifics screen for any client.
- For users with Agency Specifics *Create* permission, the **Edit** button is **not** displayed if any of the following fields has been completed and saved:
 - Referral Date
 - Referral Source
 - Agency Client ID 1
 - Agency Client ID 2
 - Alert.
- If these fields have not been completed and saved, then the **Edit** button **is visible** to users with Agency Specifics Create permission. For these users, the remaining fields on Agency Specifics Edit are grayed out.

Navigation to the Staff Permission Edit screen:



- Perform an agency search to find the agency in which the user is working.
- On the Agency Info screen for this agency, click the **Find > Staff** link. This takes you to the Staff Search Result screen.

Staff Search Result				
Staff Name	Agency	Title	Phone	Email
00CY_Deactivated	4821 - Valley AIDS Council	Data Specialist Backup	800-840-3629	
02JH_Deactivated	4820 - Coastal Bend AIDS Foundation	Case Manager		
02SM_Deactivated	4821 - Valley AIDS Council	Caseworker	800-840-3629	
03RA_Deactivated	4821 - Valley AIDS Council	Caseworker	800-840-3629	
04FW_Deactivated	4820 - Coastal Bend AIDS Foundation			
04LC_Deactivated	4821 - Valley AIDS Council	Case Manager		
05JH_Deactivate	4820 - Coastal Bend AIDS Foundation	Case manager coordinator	361-814-2001	nihinfo@od.nh.gov
05NG_Deactivated	4821 - Valley AIDS Council	Caseworker	800-840-3629	
06CB_Deactivated	4820 - Coastal Bend AIDS Foundation			
06TH_Deactivated	4820 - Coastal Bend AIDS Foundation			

- On the Staff Search Result screen, locate the user's name and click the link for that name. This takes you to the Staff Detail screen for the user.

Addison Admin

Agency ARIES Administrator
[Health and Hope](#)
Primary Site: Health and Hope Headquarters
1000 Strong Way
Maynard, CA 94520

- On the Staff Detail screen for the user, click the **Edit Permissions** button. This takes you to the Staff Permission Edit screen, which displays all of the ARIES permissions categories with checkboxes selected to represent this user's current permissions, organized by screen or user function.

Permissions for Rhetta Alexander

General group or role:

Supplement or override group permissions with checkboxes in the following list.

Function	View	Change	Create	Deactivate
CLIENT SEARCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Security Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Affected Client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NEW CLIENT/URN ELEMENTS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DEMOGRAPHICS TAB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact by mail, phone, confidential	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Client Identifiers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sexual Orientation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Related or Affected Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Agency Specifics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Share Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ELIGIBILITY TAB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Financial	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PROGRAMS TAB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Program Enrollment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
STAFF SCREEN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Permission for Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REPORTS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cross Tab Wizard	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compliance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Save Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCESS ARIESCLIENT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCESS ARIESREPORTEXPORT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCESS ARIESIMPORT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCESS ARIESADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

For a given user group, such as Case Managers, certain checkboxes are automatically selected according to a predefined set of permissions. An Admin could grant additional permissions, e.g., for the Finance and Management reports, but if the job does not typically involve these reports, that permission is omitted.

Some checkboxes are grayed out, generally because you cannot grant a staff person more permission than you have yourself; therefore, the permission check boxes that are disabled for you are also disabled for all the staff people you administer. Boxes that are grayed out may not be checked as part of a permissions adjustment. When you hover your mouse over a grayed-out checkbox, it displays a red border.

Scope of Admins' Update Capabilities

If you have been granted the right to edit staff permissions, you may only edit permissions for staff within your agency scope.

- Agency Admins can only edit staff within their agency.
- Administrative Agency Admins can only edit staff within the agencies that they manage.
- System Admins can edit all staff regardless of agency.

- **Note on User Group Assignment:** The following rule applies to assignment of a new staff member to a User Group: "Administrative Agency ARIES Administrator" cannot be assigned to a user unless their agency's Agency Type is "Administrative Agency" or "Super AA."

Permissions and Their Meanings

Generally, a staff person can be granted permission to view, change, create, and deactivate records for major ARIES functions by selecting the corresponding checkbox. Those with proper permissions can also deactivate records.

The table below outlines these types of user permissions in ARIES and their meanings. For special notes on selected permissions - those that require additional, related permissions for proper use - see the Help section "[Special Notes on Selected Permissions](#)."

Permission Type	Meaning
View	Allows user to view details of a record. For example, a staff person scheduling appointments can search and view details of a client's services, but may not to edit these service records.
Change	Allows user to edit existing records. For example, a case worker entering data for a client should be able to update these records.
Create	Allows user to add new records. For example, an agency manager should have permission to enter records for new staff persons in ARIES.
Deactivate	<p>Allows Admins to hide a record, that is, make it no longer visible to the end user. The data will not be deleted, but it will not be accessible for reporting. The data will persist in the database. Only ARIES administrators can reactivate records.</p> <p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and care should be taken n granting this permission.</p>

As discussed, the user's default permissions align with their typical job duties, but a user with sufficient permissions can modify these permissions as appropriate for special needs.

The permissions table drills down to specifics as needed for a particular function. The Medical History tab provides an example. On that tab there is a separate permission for STI/Hepatitis records, but the CD4 and Viral Load functions use the Medical History permission instead of a separate subclass of permissions.

A staff person newly entered into the ARIES system is assigned to an initial role or user group, which determines their default permissions. The default permissions for the groups or roles are created by the ARIES Administrator. But in many cases, individuals may need more or fewer permissions than the default for their group. As appropriate for the staff people at your agency, you can add to or remove from the default permissions on the Staff Permission Edit screen.

Below are examples of updates you can make to a user's ARIES permissions to fit specific working assignments. These are typical examples but are not intended to exhaust the possibilities of permissions edits.

Example 1: *The user is assigned as a case manager with no job duties that are greater or lesser than those under the role. On the Staff Permission Edit screen, make sure the General group or role dropdown displays "Case Manager" for this user. No further action is required.*

Permissions for Septimus Broviac

Agency ARIES Administrator ▼

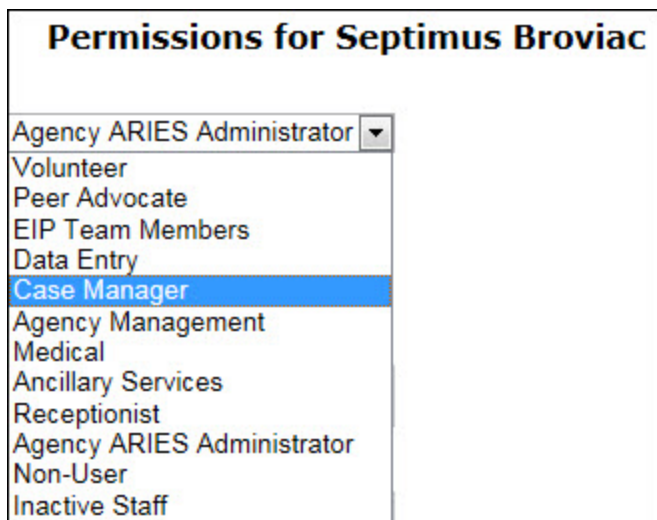
- Volunteer
- Peer Advocate
- EIP Team Members
- Data Entry
- Case Manager**
- Agency Management
- Medical
- Ancillary Services
- Receptionist
- Agency ARIES Administrator
- Non-User
- Inactive Staff

Example 2: *The user is assigned a task beyond the scope of system permissions for his/her user group. For instance, volunteers typically do not create or edit case notes for a client. However, if your agency has a volunteer who is allowed to work with case notes, then you can check the checkboxes for the corresponding permissions.*

CASE NOTES TAB	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Legal Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mental Health Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Substance Abuse Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Incident Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
All Other Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sign and Seal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Conversely, if a user belongs to a group with default permissions to manage case notes, but this user is not assigned to do so, you may deselect the checkboxes in the Case Notes Tab rows.

Example 3: *A staff person is assigned to a new set of responsibilities requiring different user permissions. For instance, a volunteer is promoted to do case management work at your agency, but was initially entered into ARIES with only volunteer permissions. On the Staff Permission Edit screen, you can grant the broader permissions of a case manager by assigning the user to the "Case Manager" role.*



In the "General group or role" dropdown list at the top of Staff Permission Edit, select a different user group for the staff person.



ARIES prompts you for confirmation of the change with the following message: "Are you sure? All custom permissions will be replaced if you click Yes."

- Click **Yes** if you wish to confirm the change. All the permissions are then changed to the default values for the new group.

OR

- Click **Cancel** if you wish to discard any updates and restore the user's existing permissions.

When you have finished customizing the staff person's permissions, click one of the following buttons at the bottom of the screen:

	Click this button to save all updates to the user's permissions and return to Staff Detail screen for the individual user.
	Click this button to discard any updates to the user's permissions and return to Staff Detail screen for the individual user.

Example 4: A staff person's permissions are revoked or the staff person leaves the agency. Managers or technical leads should not use the **Deactivate** button to remove inactive staff from ARIES. Rather, they should immediately edit the permissions of inactive staff in ARIES by changing the user group role to "Inactive." This role has no checkmarks on the user permissions screen, and hence no access to ARIES. The agency's normal support source should then be contacted to complete the Inactivation process and revoke the inactive user's digital certificates.

Example 5: A staff person is added in error. If you add a new staff person in error, contact your System Administrator.

For details on the consequences of assigning certain permissions, see the section titled [Special Notes on Selected Permissions](#).

Custom Data User Permissions

Different permission levels apply to those who set up Custom Data screens and those who enter client information on those screens. Exact permissions are granted on a per-installation basis -- contact your ARIES support provider for details.

Admin users in Admin Agencies and Partner Admins:

Generally, to edit user permissions, in the Custom Data Setup row, the View, Change, Create and Activate boxes should be checked to allow the user to set up Custom Data.

Separate permissions are required to set up Custom Data Links (hyperlinks). In the Custom Data Links Append Client Identifiers row, the Change box should be checked to allow the user to set up Custom Data Links.

Permissions for				
General group or role: Partner ARIES Administrator				
Supplement or override group permissions with checkboxes in the following list.				
Function	View	Change	Create	Deactivate
CLIENT SEARCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Security Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
All Other Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Sign and Seal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SERVICES	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Service Finalize Checkbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CUSTOM DATA ENTRY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CUSTOM DATA SETUP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Data Links Append Client Identifiers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

End users entering client information:

In the Custom Data Entry row, the View, Change, Create and Activate boxes should be checked if the user should have access to viewing, editing and entering Custom Data. Note that these permissions apply to ALL Custom Data - you cannot restrict a user's access to specific Custom Data Groups.

Permissions for Septimus Broviac				
General group or role: Agency ARIES Administrator				
Supplement or override group permissions with checkboxes in the following list.				
Function	View	Change	Create	Deactivate
CLIENT SEARCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Security Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payee	<input type="checkbox"/>	<input type="checkbox"/>		
ACCESS ARIESCLIENT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCESS ARIESREPORTEXPORT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCESS ARIESIMPORT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Import Client Data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCESS ARIESADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCESS TAURUS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel

3.2.7 Special Notes on Selected Permissions

Certain user permissions require related permissions to enable the user's access to a given function. The table below lists those related permissions and generally described the results of assigning permissions to a user.

Permission Row	Action	Related Permissions
Client Search/ Social Security Number	View	To enable search for clients by Social Security Number, user must also have Client Search View permission.
Client Search/ Affected Client	View	To search Related/Affected Clients, user must also have Client Search View permission.
New Client/ Urn Elements	Create	To enroll new clients, user must also have Client Search permissions (enrolling a new client always starts with the Search screen).
Demographics tab	View	Demographics read-only permission includes Contact Info, Demographic Detail, Living Situation, and Agency Specifics.
Demographics tab	Change	Demographics access and edit permission includes Contact Info, Demographic Detail, Living Situation, and Agency Specifics.
Demographics tab	Create	Demographics Create permissions includes ability to add data for new clients in Contact Info, Demographic Detail, Living Situation, and Agency Specifics.
Demographics tab/ Contact Info/ Contact by mail, phone, confidential	Change	To edit contact preferences on the Contact Info screen, user must also have Demographics Tab Change permission.
Demographics tab/ Client Identifiers	Change	To edit Client Identifiers, user must also have Demographics Tab View permission.
Demographics tab/ Sexual Orientation	View	To view Sexual Orientation on the Demographic Detail screen, user must also have Demographics Tab View permission.
Demographics tab/ Sexual Orientation	Change	To edit Sexual Orientation on the Demographic Detail screen, user must also have Demographics Tab Change permission.
Demographics tab/ Related or Affected Individuals	View	To view a client's linked Related/affected clients on the Living Situation screen, user must also have Demographics Tab View permission.
Demographics tab/ Related or Affected Individuals	Change	To edit the relationship of Related/Affected clients on the Living Situation screen, user must also have Demographics Tab View permission.

Demographics tab/ Related or Affected Individuals	Create	To add new linked Related/Affected clients on the Living Situation screen, user must also have Demographics Tab View permission.
Agency Specifics/ Share Status	Change	To edit a client's Share status, user must also have Agency Specifics Change permission.
Eligibility tab/ Financial	All	To view, change, create or deactivate client records in the Eligibility/Financial subtab, user must also have corresponding Eligibility Tab permissions.
Programs tab	All	Basic permissions for all subtabs under the Programs tab: Users must have these permissions first, PLUS specific permissions below for special tasks/tabs
Programs tab/ Program Enrollment	All	Basic Programs tab permissions required. Applies to the longitudinal program enrollment records for ALL programs. A user cannot be restricted to enrollment for specific programs; the permission applies to all programs.
Programs tab/Staff Assignment	View, Change	Basic Programs tab permissions required. Applies to Staff Assignment at the bottom of the Program Summary subtab.
Programs tab/MCWP	All	Basic Programs tab permissions required. Applies to the NON-enrollment data on the MCWP subtab (Services).
Programs tab/HOPWA	All	Basic Programs tab permissions required. Applies to the NON-enrollment data on the HOPWA subtab (Assessment, Status).
Medical tab	All	Applies to Basic Medical, Medical History, and OB/GYN subtabs (special permissions for Basic Medical and Medical History below).
Medical tab/Basic Medical	All	Applies to Basic Medical subtab: also requires Medical Tab permissions).
Medical tab/Medical History	All	Applies to Medical History subtab: also requires Medical Tab permissions.
Medical tab/STI/Hepatitis	All	Applies to STI/Hepatitis table on Medical History screen: also requires Medical Tab permissions and Medical History subtab permissions.
Medications tab	All	Applies to ART Medications and Other Medications subtabs.

Risk Factors tab	All	Applies to Risk Factors, Substance Abuse, Mental Health, and Assessments subtabs (special permissions for Substance Abuse and Mental Health below).
Risk Factors tab/ Substance Abuse History	All	Applies to Substance Abuse subtab (also requires Risk Factors Tab permissions).
Risk Factors tab/Mental Health History	All	Applies to Mental Health subtab (also requires Risk Factors Tab permissions).
Care Plan tab	None	Note: NO permissions are granted on the Care Plan tab level. All access is controlled by the specific permission rows identified below.
Care Plan tab/Needs Assessment	View, Create	Applies to Needs Assessment subtab.
Care Plan tab/Care Plan	All	Applies to Care Plan subtab.
Care Plan tab/ Interventions	All	Applies to Interventions on the Care Plan subtab (also requires Care Plan permissions).
Care Plan tab/Referrals	All	Applies to the Referrals subtab.
Care Plan tab/Referral Outcome	Change	Applies to the Outcome field for Referrals (also requires Referrals Change permission).
Care Plan tab/ Referral Target and Follow-up Dates, Reason	Change	Applies to the Target Date, Follow-Up Date, and Reason fields for Referrals (also requires Referrals Change permission).
Case Notes tab	Deactivate	To deactivate case notes, user must also have Change permission for the note to be deactivated.
Case Notes tab/Legal Notes	View, Change, Create	Applies to Legal Notes.
Case Notes tab/Mental Health Notes	View, Change, Create	Applies to Mental Health Notes.
Case Notes tab/Substance Abuse Notes	View, Change, Create	Applies to Substance Abuse Notes.

Case Notes tab/ Incident Report Notes	View, Change, Create	Applies to Incident Report Notes.
Case Notes tab/ all other notes	View, Change, Create	Applies to all other notes (except those specifically identified above).
Case Notes tab/Sign & Seal	View	Permission to view the Sign & Seal fields: Determines whether a user can Sign & Seal a note. Requires Create and/or Change permission for the note to be signed & sealed. Note: Permissions to view or change Signed and Sealed case notes can be enabled or disabled for a given ARIES installation.
Case Notes tab/Sign & Seal	Change	Permission to edit the Sign & Seal fields: Determines whether a user can remove the Sign & Seal, making the note editable again. Requires Change permission for the note to be signed & sealed. A password is required to sign and seal a case note. Only agency administrators, AA Administrators and Partner Administrators are granted permission to change Signed and Sealed case notes.
Services	All	Applies to Service Line Items.
Services/Service Finalize Checkbox	View, Change	View: User can see and check the box but cannot uncheck it. View and Change: User can view, check and uncheck the box. The box is not visible to those with neither View nor Change permission.
Agency	All	Applies to Agency tab and all subtabs.
Agency/Funding Sources and Contracts	All	Applies to Funding Sources and Contracts subtab (also requires Agency permissions).
Agency/Services Provided	All	Applies to Services Provided subtab (also requires Agency permissions).
Agency/RSR/RDR	View	Applies to the RSR/RDR subtab: Controls whether the user can run the RSR, RDR or CADR for the agency. Also requires Agency View permission.

Agency/Lab Batch Data Entry	View	If enabled, makes the Lab Batch Data Entry link visible on the Agency Utilities subtab. Also requires Agency View permission.
Agency/Duplicate Merge	View	If enabled, makes the Duplicate Merge link visible on the Agency Utilities subtab. Also requires Agency View permission.
Agency/Service Allocation by Contract	View	If enabled, allows Admin user to perform all tasks related to Service Allocation by Contract function.
Agency/Contract Allocation and YTD Expenditures Reports	All	If enabled, allows Admin user to perform all tasks related to Contract Allocation and YTD Expenditures Reports.
Agency/Batch Printing of Contract Allocation and YTD Expenditures Reports	View	If enabled, allows view and Batch Printing of Contract Allocation and YTD Expenditures Reports.
Agency/Summary Allocation and YTD Expenditures Report	View	If enabled, allows view and printing of Summary Allocation and YTD Expenditures Report.
Agency/Subcontractor Data Sheet	All	If enabled, allows user to perform all tasks related to Agency/Subcontractor Data Sheet.
Staff	All	Applies to the Staff Detail screen.
Staff/Staff Permissions	View, Change, Create	Applies to the Staff Permissions screen. Also requires Staff View permission.
Reports	All	Applies to all report screens accessible from the Report Menu (special permissions described for each screen below). The Create permission applies only to saving Crosstab Reports. The Deactivate permission applies only to Crosstab Reports or Ad Hoc Reports saved by the user.
Reports/Client	View	Determines whether the user can access the Client Reports menu screen.
Reports/Services	View	Determines whether the user can access the Services Reports menu screen.
Reports/Finance	View	Determines whether the user can access the Finance Reports menu screen.

Reports/Management	View	Determines whether the user can access the Management Reports menu screen.
Reports/Crosstab Wizard	View	Determines whether the user can access the Crosstab Report screen.
Reports/Compliance	View	Determines whether the user can access the Compliance Reports menu screen.
Reports/Save Reports	--	None of these permissions is active. Saving is controlled by the Reports Create permission.
Access ARIES Client	View	Determines whether the user can log in to ARIES Client. A separate certificate is required.
Access ARIES ReportExport	View	Determines whether the user can log in to ARIES ReportExport. A separate certificate is required.
Access ARIES Import	View	Determines whether the user can log in to ARIES Import. A separate certificate is required.
Access ARIES Admin	View	Determines whether the user can log in to ARIES Admin. A special certificate is required; accessible only by Partner-level staff.

Shortcut Menus

For each shortcut menu, the following permissions are needed:

- Referrals - Referrals/Create
- Eligibility Docs - EligibilityTab/Modify
- Financial - Financial/Change
- Insurance - EligibilityTab/Modify
- New Program - ProgramEnrollment/Read
- Medical (Pregnancy) - MedicalTab/Modify
- Case Notes - Create for any of the Case Notes Categories
- Needs Assessment - NeedsAssessment/Create
- Care Plan - CarePlan/Create
- Flowsheet - MedicalHistory/Read

3.2.8 Agency Emulation Mode

ARIES has an "Agency Emulation Mode" feature whereby Administrative Agencies (AA's) and Partners can log in as themselves, but work interactively within the Client application as if they were logged in as a provider-agency user. Working in Agency Emulation Mode, an AA or Partner can add or edit client data. It is not necessary for AA's to have many different logins and certificates in order to review the data of the provider agencies they manage.


The Agency Emulation functionality does not require additional user permissions. For access to this functionality, the user need only be a staff member of an administrative or Partner agency.

Log on with your administrator ID password. On the main menu, click **Shortcuts > Agency Emulation**. The Agency Emulation screen appears.



The screenshot shows a window titled "Agency Emulation". On the left, the word "Agency" is written in blue. To its right is a dropdown menu with a blue background and white text that reads "4800 - Texas Department of State Health Services". Below the dropdown are two buttons: a yellow "Save" button and a blue "Cancel" button.

Use the dropdown list to select the name of the agency you want to emulate.



The screenshot shows a window titled "Agency Emulation". On the left, the word "Agency" is written in blue. To its right is a dropdown menu with a white background and black text that reads "Shasta Services". Below the dropdown are two buttons: a yellow "Save" button and a blue "Cancel" button. A mouse cursor is pointing at the "Save" button.

To save the emulation user profile, click **Save**. Or, click **Cancel** to return to the landing page without saving the profile.

When you save the emulation profile, a banner appears at the top of your ARIES Client screens, indicating that emulation mode is on.

EMULATING SHASTA SERVICES

You may terminate emulation mode either by selecting your own agency from the Agency Emulation screen or by logging off of ARIES Client. To run in emulation mode at your next login, you will need to repeat the procedures above.

Section 4

4 Agencies

Agencies are organizations that administer services. Agencies that manage other agencies are known as *administrative agencies*. Administrative agencies are allowed to report on their client and service data, as well as administer sub-agency information. Most agency information will be entered and maintained by administrative agencies or ARIES Administrators in conjunction with a representative of the agency.

If your agency has permission to create new agencies, then you are automatically an administrative agency and you automatically administer every agency you create. An ARIES administrator can change or remove the agencies administered by using ARIES Administration application.

With the proper permissions, you can perform a variety of actions on the Agency screens; these include searching for agencies, viewing agency addresses, managing agency contracts and producing RDR and RSR reports. A search for agencies by services provided can be helpful if you need to find referrals for services such as housing, food banks, or transportation.

Attention to accuracy and completeness in entering or editing agency information helps facilitate budgeting and tracking. This also makes it easier for staff to enter services for your agency.

The Agency screens include:

- [Agency Search](#)
- [Agency Search Result](#)
- [Agency Info](#)
- [Funding & Contracts](#)
- [Services Provided](#)
- [RSR/RDR](#)
- [Lab Batch Data Entry](#)
- [Agency Utilities](#)
- [Changing Agency Information](#)
- [Agency Sites](#)
- [Funding Sources](#)
- [Contracts](#)
- [Primary Services](#)
- [Subservices](#)

4.1 Agency Search

Use the Agency Search screen to find a specific agency by name. You can also use this screen to access agencies that provide specific services, which can be helpful in finding referrals.

From the [ARIES menu bar](#) at the top of the ARIES screen, choose the Find > Agency menu item, which takes you to the Agency Search screen.

Agency Search

Search for ARIES agencies. You may use the wildcard *.

Agency

Services ▼

Display **results**

Search >

Most ARIES search screens present you with several filter options. For example, in an agency search, your filters include Agency and Services. Keep in mind that the more filters you add, the narrower your search results. Conversely, if you leave all filter fields empty, ARIES will return all records that pertain to the search.

To Search for a Specific Agency

- Enter the name of the agency you wish to find in the Agency text field. As a shortcut, you can enter the first few letters of the agency and use the "*" wildcard. Example: If you wanted to find the Ryan White Center, you would enter "ryan*."
- Click **Search**.

To Locate Agencies That Provide Specific Services

- Use the Services dropdown list, which lists all available services, to select the service or class of services. Example: If you need to give an oral health care referral, choose the dental service you are searching from the dropdown list. ARIES will search for all agencies that provide this service.
- Click **Search**.
- This takes you to the [Agency Search Result](#) screen.

Note: To narrow or increase the number of agencies listed in the Agency Search Results screen, place your cursor in the Display results field and type in a new number. The default is set at 20, which will approximately fill the Results screen.

4.1.1 Agency Search Result

When you click Search on the [Agency Search](#) screen, ARIES looks up all the agencies that match your criteria and then displays them on the Agency Search Result screen.

If only one agency is found in your search, you will be taken directly to the [Agency Info](#) screen.

Agency Search Result		
Name	Phone	Website
CA Sample Provider Agency	916-449-5842	http://www.projectaries.org
Cafe Late	333-333-4444	
Cake and Pie	409-569-7908	
CDPH Communicable Disease Control	916-449-5842	
Charles Drew University of Medicine and Science (Los Angeles)	991-199-1991	
Clear View Mission	817-596-3022	http://www.mhmrtc.org
CMP Test Agency	916-788-8888	
Community Service Organization	916-555-1212	
Contra Costa		
County AIDS Services	555-555-5555	http://countyaidsservices.org
County of Los Angeles Public Health	213-351-8314	http://ph.lacounty.gov/
County of Santa Clara	916-000-0000	
Crowheart Community Clinic	307-555-1212	http://www.yahoo.com

13 records displayed

13 records displayed

Agency search results are listed in a table, alphabetically by agency name.

- Click an agency name to go to that agency's [Agency Info](#) screen.
- Click an agency's Web site link to open a new browser window for that agency's Web site.

Note: If you're having trouble finding the agency you're looking for, try a new search and double-check your spelling. The quickest way to get results is to type the first few letters of the agency name followed by "*" and then select from the resulting matches.

- To narrow or increase the number of agencies listed on the Agency Search Results screen, place your cursor in the Display field and type in a new number.

If you wish to create a new agency, click the **New Agency** button at the bottom of the screen, which takes you to the [Agency Search](#) screen.

Note: This option is only available to users with the appropriate permission level.

4.2 Agency Info

The Agency Info screen displays the following tabs at the top of the window: Agency Info, Funding & Contracts, Services Provided, RSR/RDR, Lab Batch Data Entry and Agency Utilities. These tabs provide information about an agency, including contact and site information, funding sources, services provided, and an RSR/RDR Wizard.

Use these tabs to toggle between the screens.

AGENCY INFO FUNDING & CONTRACTS SERVICES PROVIDED RSR/RDR LAB BATCH DATA ENTRY AGENCY UTILITIES

AGENCY INFORMATION ARIES

Shasta Test Services

Agency [Edit](#)

Medical Office 633 Bear Ave Place SQA, TX 82314 408-231-2789 (Main) 408-231-2769 (TTY)	Housing and Urban Development 534 Wolf Street SQA, TX 58741 408-231-2752 (Main) 408-231-2732 (Fax)	Other Services 234 Lion Ct SQA, TX 32469 408-231-2717 (Main) 408-231-2787 (TTY)	Insurance Office 256 Tiger St. SQA, TX 54873 408-231-2726 (Main) 408-231-2736 (Fax)	Sonoma Medical Allied Systems Health 448 West Napa st. Sonoma, CA 95476 707-933-5060 (Main) 707-933-5066 (Fax)	Roses Associated Medical 2300 Chanate Rd Santa Rosa, CA 95404 707-562-3111 (Main) 707-562-3122
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Website:
<http://www.fakeshastas.org>

Contact: Mike Omara
momara@fakeshastas.org

[Find Staff](#)

Notes: This agency was created to run the automated scripts.

- Click the Contact Email link to open a new email message addressed to the contact person.
- Click the Find Staff link to go to a [Staff Search Result](#) screen that contains all the staff persons employed by that agency.
- Click the Website link to go to the agency's website. You will be directed to a new window.
- Click the **Edit** button to go to the [Agency Edit](#) screen.

Note: This option is only available to users with the appropriate permission level.

4.3 Funding & Contracts

The Funding & Contracts tab displays an agency's contracts and its funding sources. The table columns include the contract name, the source of the funding, the contract number, the start and end date of the contract and the amount of funding.

AGENCY INFO FUNDING & CONTRACTS SERVICES PROVIDED RSR/RDR LAB BATCH DATA ENTRY AGENCY UTILITIES

FUNDING SOURCES & CONTRACTS ARIES

Clear View Mission

Funding Sources & Contracts [Edit](#)

Contract Name	Funding Source	Contract #	Start Date	End Date	Amount
EIP 09/10 CA/OA	CA State Office of AIDS	3	1/1/2009	12/31/2010	\$100,000.00
RW Part A	Ryan White Part A	568	1/1/2009	12/31/2009	\$10,000.00
RW 2009	Local Grant 2006	555	10/1/2008	10/30/2008	\$2,000.00
HOPWA 09 HUD	HOPWA	1265	7/1/2008	6/30/2009	\$100,000.00
Sample contract	Episcopal C Service	888	7/1/2008	12/31/2008	\$10,000.00
Sample Contract 2008	Ryan White Part A	568	7/1/2008	12/31/2008	\$10,000.00
Ryan White Part C 08/09	CA State Office of AIDS	555	1/1/2008	12/31/2008	\$200,000.00
New Contract 2008	Eileen Grant sample	5675678	1/1/2008	12/31/2008	\$4,000,000.00
HOPWA 07/08 HUD	HOPWA	125	1/1/2008	12/31/2008	\$100,000.00
CSP (Part B)	CA State Office of AIDS	888	1/1/2008	12/31/2008	\$0.00
EIP 08/09 CA/OA	CA State Office of AIDS	3	1/1/2008	12/31/2008	\$100,000.00
VIC Food Services2008	VIC	v1	1/1/2008	12/31/2008	\$2,500.00
Title III 07/08 (copy1)	Ryan White Title III	444	7/1/2007	6/30/2008	\$1.00
RW Part A 2008	Ryan White Title I	A1	7/1/2007	6/30/2008	\$0.00
Private Funding 07/08	VIC	5555	1/1/2007	12/31/2007	\$10,000.00

To Display a Funding Source

- Click the **Edit** button to go to the [Funding Sources Edit](#) screen.

4.4 Services Provided

The Services Provided tab displays all the services provided by an agency. The services are broken down by service, unit, default quantity, default price, Unit of Service (UOS) goal, Unduplicated Client (UDC) goal, budget, and any notes.

Service	Unit	Default Quantity	Default Price	UOS Goal	UDC Goal	Budget	Notes
Contract 04-05 RW 1 >> Ryan White -> Outreach Services -> Outreach Services							
Outreach Services - MAI - African American	Case	1	\$253.97	300	10	\$76,190.00	
Contract 04-05 RW 1 >> Ryan White -> Psychosocial Support Services -> Other Counseling Individual							
Smoking Cessation Counseling Services	15 Minutes	1	\$40.66	205	20	\$8,335.00	
Contract 04-05 RW 1 >> Ryan White -> Rehabilitation Services -> Physical Therapy							
Physical Therapy	Visit	1	\$34.06	600	60	\$20,436.00	
Contract 04-05 RW 2 >> Ryan White -> Psychosocial Support Services -> Other Counseling Individual							
Smoking Cessation Counseling Services	15 Minutes	1	\$40.36	60	10	\$2,423.00	
Contract 05-06 RW 1 >> Ryan White -> Outreach Services -> Outreach Services							
Outreach Services - MAI - African American	Contact	1	\$253.97	300	10	\$40,000.00	
Outreach Services - MAI - African American - Case Monitoring	Case	1	\$0.00	300	10	\$36,190.00	
Contract 05-06 RW 1 >> Ryan White -> Psychosocial Support Services -> Other Counseling Individual							

To Display Services Provided under a Specific Contract

From the Contract dropdown, select one of the contracts displayed.

- Click **Search** to display services for that contract.
- OR
- Click **Edit** to go the [Agency Subservices Edit](#) screen to display the subservices for that service.

4.5 RSR Wizard

The RSR tab displays links to three reports.

Link	Description
Ryan White HIV/AIDS Services (RSR) Export (2015)	Exports the Ryan White HIV/AIDS Services to an XML file (for 2015)
Ryan White HIV/AIDS Services (RSR) Export (2014)	Exports the Ryan White HIV/AIDS Services to an XML file (for 2014)
Ryan White HIV/AIDS Services (RSR) Export (2009-2013)	Exports the Ryan White HIV/AIDS Services to an XML file (for 2009-2013)

Ryan White HIV/AIDS Services (RSR) Export (2015)

- Clicking on this link exports the Ryan White HIV/AIDS services to an XML file for 2015.

Ryan White HIV/AIDS Services (RSR) Export (2014)

- Clicking on this link exports the Ryan White HIV/AIDS services to an XML file for 2014.

Ryan White HIV/AIDS Services (RSR) Export (2009-2013)

- Clicking on this link exports the Ryan White HIV/AIDS services to an XML file for 2013.

You can also access these reports by clicking Reports > Compliance Reports and then the individual report links.

4.6 Lab Batch Data Entry

The Lab Batch Data Entry tab allows for batch entry of CD4 and Viral Load test results in a single location. This saves significant time over the task of retrieving individual clients' records and tabbing to their medical screen to enter data.

Navigation: In Agency Search, type the name of your agency and click Search. Your agency appears with the Agency Info tab selected.

Click the Lab Batch Data Entry tab. The system displays that tab.



To enter data on CD4 Tests, click the link titled [CD4 Tests](#). The [CD4 Tests](#) page appears.

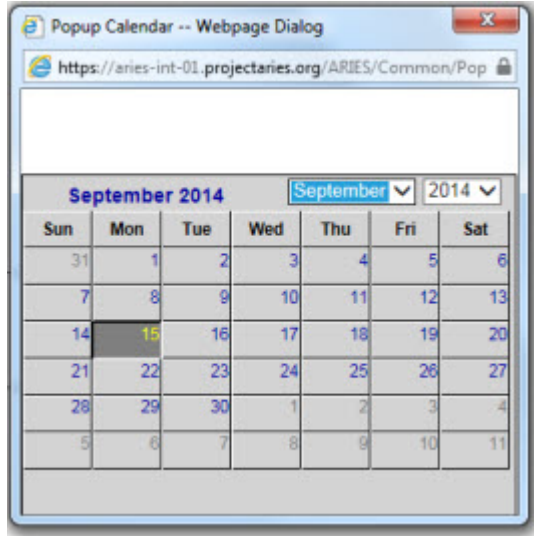
To enter data on Viral Load Tests, click the link titled [Viral Load Tests](#). The [Viral Load Tests](#) page appears.

4.6.1 Batch Entry of CD4 Tests

Batch Entry of CD4 Tests for Clear View Mission				
Agency Client ID	CD4 Date *	T Cell Count *	%	Validation
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	



Complete the fields for batch entry.

Note that fields with a red asterisk are required for the RDR Report.



Identifier dropdown (left column)	Select the identifier to be associated with the data entered: Agency Client ID, Agency Program ID, ARIES ID or Extended URN .
CD4 Date	<p>Enter the date on which the CD4 information was captured. Use the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>

T Cell Count	Enter the T cell count for the client.
%	Enter the percentage of the total blood count represented by the T cell count.

After completing all fields:

	<p>Click the Save button to store your changes to ARIES and return to the Batch Entry of CD4 Tests screen, where your new entries are now displayed: A list of IDs, dates of entry, T-cell counts and percentages entered, with type of client identifier.</p> <p>If your entry included errors, these are displayed in red in the Validation column to the right.</p> <p>Examples:</p> <p style="color: red;">No client found with provided AgencyClientID</p> <p style="color: red;">OR: Multiple clients found with AgencyClientID provided</p>
	<p>Click Cancel to return to the read-only Lab Batch Data Entry screen without saving changes.</p>

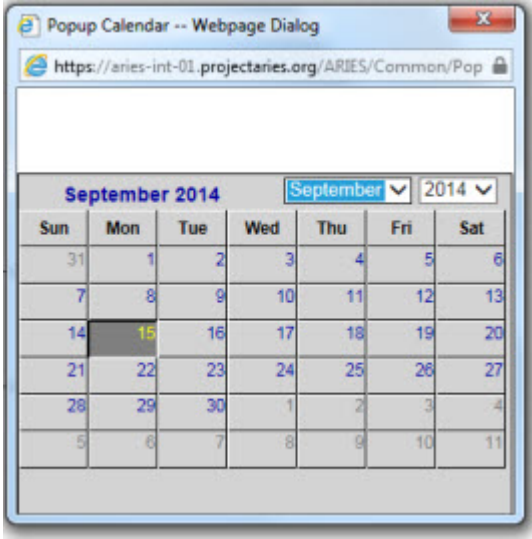
4.6.2 Batch Entry of Viral Load Tests

Batch Entry of Viral Load Tests for Clear View Mission					
Agency Client ID	Viral Load Date *	<=>	Viral Load Count *	Test Type	Validation
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	=	<input type="text"/>	<input type="text"/>	
 					


Complete the fields for batch entry.

Note that fields with a red asterisk are required for the RDR Report.

Identifier dropdown (left column)	Select the identifier to be associated with the data entered: Agency Client ID, Agency Program ID, ARIES ID or Extended URN .
--	---

<p>Viral Load Date</p>	<p>Enter the date on which the Viral Load information was captured.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p><=></p>	<p>Select an operator for the viral load count: = (equals), > (greater than), or < (less than).</p>
<p>Viral Load Count</p>	<p>Enter the client's viral load count on the date selected.</p>
<p>Test Type</p>	<p>Use the dropdown to select the type of test performed: Roche PCR Standard; Roche PCR Ultrasensitive; Bayer bDNA; or BioMerieux NucliSens.</p>

After completing all fields:

	<p>Click the Save button to store your changes to ARIES and return to the Batch Entry of Viral Load Tests screen, where your new entries are now displayed: the Validation column on the right will display the message "Data is recorded on the system." A list of IDs, dates of entry, Operators, viral load counts and test types, with type of client identifier.</p> <p>If your entry included errors, these are displayed in red in the Validation column to the right.</p> <p>Examples:</p> <p>No client found with provided AgencyClientID</p> <p>OR: Multiple clients found with AgencyClientID provided</p> <p>OR: Valid search values for Client Identifier are A-Z, * . , - ' & ! @ # () /</p>
---	--



Click **Cancel** to return to the read-only [Lab Batch Data Entry](#) screen without saving changes.

4.7 Agency Utilities

The Agency Utilities screen provides a single point of access to certain special functions. These functions can make permanent and irreversible changes to client and agency data, and only highly skilled users should be given access to this page. The functions linked from this page include:

- [Duplicate Merge](#)
- [Duplicate Merge Undo](#)
- [Custom Data Setup](#)
- [Referral Agencies](#)
- [Propagate User Group Permissions](#)
- [Error Log](#)
- Outreach Referral Staff
- Task Setup

Click on the links for a description of these functions.

4.7.1 Duplicate Merge

The Duplicate Merge screen enables you to review potential duplicate client records and merge those that are found to be duplicates. The Duplicate Merge screen displays match rules and buttons for merging duplicate records.

Duplicate Merge

Match rules:

Items in grey are slow performing; the system may time out if the configuration uses a shorter time out than needed.

- Same full name but different URNs
- Transposed elements within date of birth
- Full names are the same other than the presence/absence of "junior" or "senior"
- Clients where soundex scores their name as equivalent and date of birth is the same
- Current residence address -- matching on the first 10 characters of the street address, the entire city and the entire ZIP
- Transposed first and last names
- Clients where the first 10 characters of the URNs match

Last run: 12/31/2000
12:00:00 PM

By: 7

Exclude Ignores: True

Messages: No last run info

< Prev Page 1 of 3 Next >

URN 1 URN 2

Last Name First Name

Notes


- The match rules highlighted in grey require extra computing time to locate duplicate records. Select these options only when absolutely necessary, as they could slow down the ARIES servers.

- In some cases, a merge of two clients would result in multiple *non-longitudinal* records for the same group. If a user attempts to merge such clients, ARIES will transfer the most recent updated non-longitudinal custom data record to the new client ID created in the merge.
- When a duplicate merge involves *longitudinal* custom data records with the same content for both clients, ARIES reassigns the new client ID.
- Custom data for clients will not appear on client-data screens in Duplicate Merge. The data is automatically merged based on the last saved date.

The following table describes the items displayed on the Duplicate Merge screen.

<p>Same full name but different URNs</p>	<p>This match rule returns client records that have the same full name but have different Unique Record Numbers (URNs).</p>
<p>Transposed elements within date of birth</p>	<p>This match rule returns client records that have the same date of birth day or month numbers, but with numbers reversed (for example, 1/2/1989 and 2/1/1989).</p>
<p>Full names are the same other than the presence/absence of "junior" or "senior"</p>	<p>This match rule returns client records that have full names that differ only by "junior" or "senior" in the name.</p>
<p>Clients where soundex scores their name as equivalent and the date of birth is the same</p>	<p>This match rule returns client records with names that sound the same, and with the same date of birth.</p>

	Note: Soundex is an algorithm that compares the sounds of words.
Current residence address – matching on the first 10 characters of the street address, the entire city and the entire ZIP	This match rule returns client records that have the same residence address.
Transposed first and last names	This match rule returns client records that have the same first name and last name, but in which names were originally entered in reverse order by mistake.
Clients where the first 10 characters of the URNs match	This match rule returns client records that have the same first ten characters in their URNs.
Exclude Previous Ignores	Clicking this button initiates a search for client records using the selected match rules. Any records previously marked as ignored are not displayed. (The method for marking records as ignored is discussed below).
Include Previous Ignores	Clicking this button initiates

	<p>a search for client records using the selected match rules. All record matches are displayed, including records previously marked as ignored.</p>
<p>< Prev Page 1 of 3 Next ></p>	<p>When many client records are returned, you can use Prev and Next to navigate between the pages of records.</p>
 <p>The screenshot shows a form with two rows. The first row contains two text input fields labeled 'URN 1' and 'URN 2', followed by a blue button labeled 'Merge'. The second row contains two text input fields labeled 'Last Name' and 'First Name', followed by a blue button labeled 'Search'.</p>	<p>You can directly merge two records by entering the record URNs in the URN 1 and URN 2 fields, and then clicking the adjacent Merge button.</p> <p>You can also search for records by entering the client name in the Last Name and/or First Name fields, and then clicking the adjacent Search button.</p>

To search the client records and perform a duplicate merge:



1. Select the match rule(s) for locating the client records.
2. Click one of the following buttons:

Exclude Previous Ignores (hides previously ignored client records)

Include Previous Ignores (displays all client records)

Examples of client record matches are illustrated below.

MATCHED PAIRS		MATCH CRITERIA							
CLIENT 1	Client 2	1	2	3	4	5	6	7	
Banister, Berry BANISTER, BERRY Client refused to report (Shared) 11/30/1923 MMN: BB B523 B600 BRBN11302399BB	Banister, Berry B BANISTER, BERRY Client refused to report (Shared) 11/30/1923 MMN: BB B523 B600 BRBN1130239BBB							7	Merge Ignore
Mast, Micha T MAST, MICHA Male (Shared) 10/31/1960 MMN: MR M230 M200 MCMS1031601TMR	Mastro, Michael Q MASTRO, MICHAEL Male (Shared) 10/31/1960 MMN: MR M236 M240 MCMS1031601QMR							7	Merge Ignore

MATCHED PAIRS	<p>The matching client records, which are shown in the Client 1 and Client 2 boxes.</p> <p>Each client's name, URN, gender, share status, date of birth, and mother's maiden name (MMN) are shown.</p> <p>If the client did not report their gender, then "Client refused to report" is shown for their gender.</p> <p>The soundex codes for the client name and URN are shown at the bottom of each box.</p>
MATCH CRITERIA	<p>The numbers corresponding to the rules that matched client 1 and client 2. For example, 7 means the match rule "Clients where the first 10 characters of the URNs match" was used.</p>
	<p>Click this button to ignore the match. The match will not be displayed in the future if you click the Exclude Previous Ignores button.</p>
	<p>Click this button to merge the two client records.</p>



- To merge the records, click the **Merge** button. The Merge Records screen is displayed. The top of the Merge Records screen is illustrated below.

Task	Table	Agency	Has Client 1 Record	Has Client 2 Record	Completed
Merge	Client	Shared Record	True	True	False
Merge	ContactInfo	Shared Record	True	True	False
Merge	Demographic	Shared Record	True	True	False
Merge	LivingSituation	Shared Record	True	True	False
Merge	Financial	Shared Record	True	True	False
Merge	Medical	Shared Record	True	True	False
Merge	TB	Shared Record	True	True	False
Merge	Medication	Shared Record	True	True	False
Merge	RiskFactor	Shared Record	True	True	False
Merge	SubstanceAbuse	Shared Record	True	True	False
Merge	MentalHealth	Shared Record	True	True	False
Merge	EIPPsychosocial	Shasta QA	True	True	False
Merge	MedicarePartD	Shared Record	True	True	False
Merge	AgencySpecifics	Shasta QA	True	True	False

Task	The task to be performed ("Merge" is for merging records).
Table	The table containing the client data to be merged.
Agency	The agency for the client data. ("Shared Record" means the client is shared by agencies.)
Has Client 1 Record	Whether the table has data for client 1 (True/False).
Has Client 2 Record	Whether the table has data for client 2 (True/False).
Completed	Whether the client records have been merged for the highlighted table (True/False). As you progress through the duplicate merge process for each table, "Completed" will change to "True" for that table. You must go through all of the tables before the merged records can be permanently saved.

The bottom of the Merge Records screen, showing the table's data for client 1 and client 2, is illustrated below.

Field Name	Record 1	Select All	Record 2	Select All
clientID	1500002730		1500002732	
firstName	<input checked="" type="radio"/> Berry		<input type="radio"/> Berry	
lastName	<input checked="" type="radio"/> Banister		<input type="radio"/> Banister	
middleInitial	<input checked="" type="radio"/>		<input type="radio"/> B	
mothersMaidenName13	<input checked="" type="radio"/> BB		<input type="radio"/> BB	
dateOfBirth	<input checked="" type="radio"/> 11/30/1923 12:00:00 AM		<input type="radio"/> 11/30/1923 12:00:00 AM	
gender	<input checked="" type="radio"/> Client refused to report		<input type="radio"/> Client refused to report	
isRelatedOrAffected	False		False	
isShared	True		True	
dateOfDeath	<input checked="" type="radio"/>		<input type="radio"/>	
lastSavedBy	1500000433		1500000433	
lastSavedDate	11/17/2009 4:49:35 PM		11/17/2009 4:49:35 PM	
lastSavedSource	F		F	
createDateTime	11/17/2009 4:49:35 PM		11/17/2009 4:49:35 PM	
createAgencyID	1500000158		1500000158	
createSource	F		F	
<input type="button" value="Next"/> <input type="button" value="Cancel"/>				

Field Name	The name of the column in the database table where the client records are stored.
Record 1	The column values for the client 1 record. Clicking Select All selects all the field values for the client 1 record.
Record 2	The column values for the client 2 record. Clicking Select All selects all the field values for the client 2 record.
	Click this button to move to the next merge task.
	Click this button to cancel the merge.

Note: ARIES automatically sets the radio buttons to pick the record value that was most recently updated. You must ensure the correct record value is selected and set the radio buttons as required.

- When you have finished selecting the values for the table, click the **Next** button to proceed to the next table.

Notes

- Some field values cannot be changed. You cannot set the radio buttons for those values.
- If the client has only one record in a table, ARIES automatically copies the record for you and the record is not shown on the screen.
- An unshared client might have multiple records in the same table. This is because each agency retains its own copy of the client's data when the client is unshared. If each record is from a different agency, ARIES automatically copies the records for you and the records are not shown on the screen.

After you click the **Next** button, the task is marked as completed in the top portion of the Merge Records screen and the next table is highlighted. In the illustration below, the Client table is marked as completed and the ContactInfo table is highlighted.



Task	Table	Agency	Has Client 1 Record	Has Client 2 Record	Completed
Merge	Client	Shared Record	True	True	True
Merge	ContactInfo	Shared Record	True	True	False
Merge	Demographic	Shared Record	True	True	False
Merge	LivingSituation	Shared Record	True	True	False
Merge	Financial	Shared Record	True	True	False
Merge	Medical	Shared Record	True	True	False
Merge	TB	Shared Record	True	True	False
Merge	Medication	Shared Record	True	True	False
Merge	RiskFactor	Shared Record	True	True	False
Merge	SubstanceAbuse	Shared Record	True	True	False
Merge	MentalHealth	Shared Record	True	True	False
Merge	EIPPsychosocial	Shasta QA	True	True	False
Merge	MedicarePartD	Shared Record	True	True	False
Merge	AgencySpecifics	Shasta QA	True	True	False

- Then select the column values for the ContactInfo table using the radio buttons next to each value as was done for the Client table.
- Proceed through all the tasks until they are complete.
- After the tasks are complete, you are prompted to save the merged records.

• All records have been prepared for the merge. Click Save to record the selections have you made.

Merge Records

Task	Table	Agency	Has Client 1 Record	Has Client 2 Record	Completed
Merge	Client	Shared Record	True	True	True
Merge	ContactInfo	Shared Record	True	True	True
Merge	Demographic	Shared Record	True	True	True
Merge	LivingSituation	Shared Record	True	True	True
Merge	Financial	Shared Record	True	True	True
Merge	Medical	Shared Record	True	True	True
Merge	TB	Shared Record	True	True	True
Merge	Medication	Shared Record	True	True	True
Merge	RiskFactor	Shared Record	True	True	True
Merge	SubstanceAbuse	Shared Record	True	True	True
Merge	MentalHealth	Shared Record	True	True	True
Merge	EIPPsychosocial	Shasta QA	True	True	True
Merge	MedicarePartD	Shared Record	True	True	True
Merge	AgencySpecifics	Shasta QA	True	True	True

	Click this button to save the merged records. If there are no errors, a new client record is created and the two old records are deleted.
	Click this button to cancel the merge.

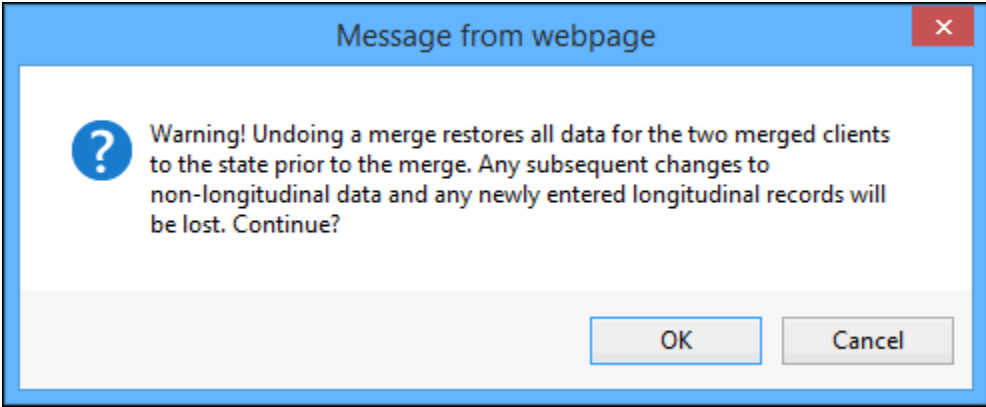
After **Save** or **Cancel** is clicked, the Duplicate Merge screen is displayed again and you can start the merge process for another client record.

4.7.1.1 Duplicate Merge Undo

The Duplicate Merge Undo screen enables you to review previously merged duplicate client records and undo any merges that were done in error. The Duplicate Merge undo screen shows all merges since today's date, with the exclusion of merges that were completed prior to the "Merge Expiration Date" set by your administrator. This means that merges can only be undone within a system specified window of time.

Client Name	New ARIES ID	Old ARIES ID 1	Old ARIES ID 2	Merge Date	
Belle, Howard K	100019157	100006915	100019157	08/04/2015 02:04 PM	Undo

Selecting 'Undo' will be a COMPLETE ROLLBACK of ALL ARIES CLIENT DATA, from the point in time when the merge was done. Clicking 'Undo' will display a warning message saying "Warning! Undoing a merge restores all data for the two merged clients to the state prior to the merge. Any subsequent changes to non-longitudinal data and any newly entered longitudinal records will be lost. Continue?"



If you are certain that you want to proceed, undoing a previous merge, then select 'OK.' If you are not certain, select 'Cancel.' After a successful Merge Undo, you will be returned to the Duplicate Merge Undo screen. A message will be displayed at the top of the screen indicating the "Dup Merge Undo was successful." You will also no longer see the previously merged record displayed in the table.

Client Name	New ARIES ID	Old ARIES ID 1	Old ARIES ID 2	Merge Date
• Dup Merge Undo was successful.				

4.7.2 Custom Data Setup

The Custom Data Setup page provides functionality to create Custom Data fields at the Administrative Agency (AA) and Partner levels, depending on the permissions set for a specific installation. Custom Data created at the AA level is available to all agencies managed by the AA. Custom Data created at the Partner level is available to all agencies. The Custom Data function supports multiple non-longitudinal and multiple longitudinal data elements, as well as multiple data types. However, bear in mind that this function can make permanent and irreversible changes to client and agency data.

Functions that the Admin user can carry out via Custom Data Setup include:

- Setting up a [new Data Group](#).
- [Creating](#) new custom fields or [editing](#) data groups or custom fields.

Creation and editing steps are described in this Help section. Also see the section on custom field [data types](#).

There are special procedures for creating fields of the Hyperlink data type. Click [here](#) to view these instructions.

- Setting appropriate [end-user permissions](#).

View Help for [Custom Data User Permissions](#) procedures.

Help for end users to complete available Custom Data fields can be viewed in the section on [Custom Data Entry](#).

Navigation: To create or edit Custom Data Groups and fields, the Admin user should go to the Agency Utilities tab and click on the Custom Data Setup link.





The read-only Custom Data Setup screen appears.

AGENCY INFO	FUNDING & CONTRACTS	SERVICES PROVIDED	RSR/RDR	LAB BATCH DATA ENTRY	AGENCY UTILITIES
					AGENCY UTILITIES ARIES
4800 - Texas Department of State Health Services					
Custom Data Setup New					
Group Name	Code	Longitudinal	Agency	Field Count	
Clinical Trial Status	cts	false	4800 - Texas Department of State Health Services	1	Edit
Education Level	el1	false	4800 - Texas Department of State Health Services	3	Edit
Fasting Lipids	fl1	true	4800 - Texas Department of State Health Services	6	Edit
Satisfaction Survey	ssrv	true	4800 - Texas Department of State Health Services	5	Edit

Attributes of any Custom Data Groups or fields already created for agencies under your supervision will be displayed on the read-only Custom Data Setup screen.

Custom Data fields are always a part of a Custom Data Group. Each Custom Data Group may have one or many data fields, and the group may be longitudinal (more than one record per client) or non-longitudinal (only one record per client). The setup screen displays only the Custom Data Groups. To view the individual data fields that are a part of each group, click the **Edit** button.

Note: Client data on Duplicate Merge screens: Custom data for clients will not appear on client-data screens in Duplicate Merge. The data is automatically merged based on the last saved date.

Group Name	The name of the group in which a set of Custom Data fields is included. This group name will appear on the Custom Data user tab.
Group Code	The system code for the group.
Longitudinal	Indicates whether this group contains longitudinal (historical) data (true/false). Note: The ARIES system will not allow a change from longitudinal to non-longitudinal.
Agency	The name of the agency creating the Custom Data field.
Field Count	The total number of fields in a group.
	Click this button to create a new Custom Data Group.
	Select a group to update and click the adjacent Edit button.

New Group Setup

To create a new Custom Data Group, click New on the read-only Custom Data Setup screen. A blank Custom Data Setup Record Edit screen appears. There, you may first create the Custom Data Group and then create fields within that group.

Custom Data Setup Record Edit



Group Name

Group Code

Allow multiple records for each client

Display Order

Save + Next ▶
Cancel

Group Name	The name of the group in which a set of Custom Data fields is included. This group name will appear on the Custom Data user tab.
Group Code	The system code for the group. Enter a code of your own choosing which will uniquely identify the group, but will not be visible on the Custom Data user tab. Type a string containing 32 or fewer lower-cased alphanumeric characters.
Allow multiple records for each client (checkbox)	Check this box to enable the system to accept multiple records for each client. If multiple records are allowed, the Custom Data Group will be Longitudinal.
Display Order	The order in which the Custom Data Group's name will be displayed on the screen.
	Click this button to create the parent record for the group.
	Click this button to discard your entries and return to the read-only Custom Data Setup screen.

Creating a New Custom Field

When you create the parent record for the group by clicking **Save + Next**, the system displays field configuration options on the next screen.

Custom Data Setup Record Edit

Group Name

Group Code

Allow multiple records for each client

Display Order

Save + Done
Cancel
Deactivate

Field Definition New

Field Code	Field Title	Type	Required	Show on Read Only	Display Order	Part of Unique Key	Validation

You may edit attributes of the overall Data Group in the fields at the top of the screen. To create a new custom field within the Data Group, click the **New** button adjacent to "Field

Definition." A Custom Data Setup Field Edit / New Field screen displays options for the field's data type.

Custom Data Setup Field Edit

New Field

Select the data type

String
 Integer
 Decimal
 Boolean
 Date
 Dropdown
 Hyperlink

Select a radio button for the data type of the new field. Then click **Save**. Your selection of data type determines the appearance of the next screen, which displays configuration options for that data type. In this example, the data type selected is Boolean.




- For illustrations of other data types, go to [Data Types](#).

Custom Data Setup Field Edit

Boolean Data Type

Group ID experimental01
Field ID experimentalmedname
Field Title Name of Experimental Medication
 Part of unique key constraint
 Show field on read only screen
 Is Initially Checked
Default Value
Display Order 1

Group ID	Read-only on this screen; supplied by your earlier input. This is the code for the group in which the Custom Data field is included.
Field ID	The system name to identify the field. Type a unique string containing 32 or fewer lower-cased alphanumeric characters.
Field Title	The label to be displayed to users on the field.

<p>Part of unique key constraint (checkbox)</p>	<p>A unique constraint enforces the uniqueness of values in columns to prevent the entry of duplicate values. The uniqueness can be based on one or more columns. Null values are allowed. Check if this field should be a part of the unique constraint; else leave unchecked.</p>
<p>Show field on read only screen (checkbox)</p>	<p>Check to display the field on the read-only Custom Data screen; else leave unchecked. Leaving the box unchecked means the field will display only on the designated Client Edit screen. If your Custom Data Group contains many fields, it will be difficult to display all of them on the read-only screen because of horizontal space limitations.</p>
<p>Default Value / Is initially checked (checkbox)</p>	<p>Indicates whether the checkbox is initially checked or unchecked by default on the user screen. Other data types will have different default options.</p>
<p>Display Order</p>	<p>The order in which the Custom Data field will be displayed on the screen.</p>
<p></p>	<p>Click this button to store your input and return to the Custom Data Setup Record Edit screen, where your updates will be displayed.</p>
<p></p>	<p>Click this button to discard your entries and return to the Custom Data Setup Record Edit screen.</p>
<p></p>	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click this button to deactivate the record for the field.</p>

When you click **Save** on this screen, your entries for the new Custom Data field are saved and you return to the Custom Data Setup Record Edit screen. On that screen, you may click **New** again to create additional Custom Data fields. To view examples for all data types, go to Data Types.

To set up a longitudinal data grid on a read-only page

- In editing the Data Group information on Custom Data Record Setup Edit, click the box labeled "Allow multiple records for each client."
- In editing each field of the data group, click the checkbox labeled "Show field on read only screen."

An example of the resulting data grid would appear on the read-only Custom Data tab.

Satisfaction Survey New				
Visit Date	Physician	Wait-Time (Minutes)	Satisfaction Score	Comments
5/27/2010	Dr. Jones	10	9	Doctor was very pleasant and provided me with several referrals. Edit
7/19/2009	Dr. Smith	75	2	Long wait, doctor was rushed, did not answer my questions. Edit

To Edit an Existing Group or Custom Data Field

To edit an existing Data Group or field, start by clicking the **Edit** button to the right of the group's name on the read-only Custom Data Setup screen. A Custom Data Setup Record Edit screen for the group appears. The top portion is in Edit mode.

Custom Data Setup Record Edit

Group Name

Group Code

Allow multiple records for each client




Display Order

Save + Done
Cancel
Deactivate


Editing the Group


You may update the editable fields for the group on the top portion of the screen as follows:



Group Name	The name of the group in which a set of Custom Data fields is included. This group name will appear on the Custom Data user tab.
Group Code	The system code for the group. This value can be edited for an existing Data Group.
Allow multiple records for each client (checkbox)	<p>Check this box to enable the system to accept multiple records for each client. If multiple records are allowed, the Custom Data Group will be Longitudinal.</p> <p>Note: When editing a Custom Data Group, you can change from Non-Longitudinal to Longitudinal (by checking "Allow multiple records per client" instead of leaving it unchecked), but you cannot change from Longitudinal to Non-Longitudinal (by unchecking a checked "Allow multiple records per client") since that would result in data loss.</p>
Display Order	The Order in which the Custom Data Group's name will be displayed on the screen.

	<p>Click this button to process your changes, update them in the ARIES database and return to the read-only Custom Data Setup screen, where your updates will be displayed.</p> <p>Note: If you also want to create or edit custom fields, stay on the Custom Data Record Edit screen and</p> <ul style="list-style-type: none"> Click the New button adjacent to "Field Definition" to create a new field, <p>OR</p> <ul style="list-style-type: none"> Click the Edit button to the right of the row for an existing field.
	<p>Click this button to discard your entries and return to the read-only Custom Data Setup screen.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click this button to deactivate the record for the Custom Data Group.</p>

The bottom portion of the Custom Data Setup Record Edit screen is read-only, but displays buttons for further editing options.

Field Definition 							
Field Code	Field Title	Type	Required	Show on Read Only	Display Order	Part of Unique Key	Validation
m21	CD4 and Viral Load done	Boolean	False	True	1	False	tbd



	<p>Click this button to open a wizard for creating a new Custom Data field. Click here to view procedures for creating new fields.</p>
	<p>Click this button to go to a Custom Data Setup Field Edit screen for the selected existing field.</p> <p>The following is for a field of Boolean data type. Click here to view configuration screens for other data types.</p>

When you click **Edit** on the row for an existing data field, the Custom Data Setup Field Edit screen for that field appears.

Note: You cannot change the data type when editing a field. Exception: The system does allow a change from Integer to Currency data type.

Custom Data Setup Field Edit

Boolean Data Type

Group ID m21

Field ID

Field Title




Part of unique key constraint

Show field on read only screen

Default Value Is Initially Checked

Display Order

Group ID	Read-only on this screen; supplied by your earlier input. This is the code for the group in which the Custom Data field is included.
Field ID	The system name to identify the field. Type a unique string containing 32 or fewer lower-cased alphanumeric characters.
Field Title	The label to be displayed to users on the field.
Part of unique key constraint (checkbox)	A unique constraint enforces the uniqueness of values in columns to prevent the entry of duplicate values. The uniqueness can be based on one or more columns. Null values are allowed. Check if this field should be a part of the unique constraint; else leave unchecked.
Show field on read only screen (checkbox)	Check to display the field on the read-only Custom Data screen; else leave unchecked. Leaving the box unchecked means the field will display only on the designated Client Edit screen. If your Custom Data Group contains many fields, it will be difficult to display all of them on the read-only screen because of horizontal space limitations.
Default Value Is initially checked (checkbox)	Indicates whether the checkbox is initially checked or unchecked by default on the user screen. Other data types will have different default options.
Display Order	The order in which the Custom Data field will be displayed on the screen.

	<p>Click this button to store your input and return to the Custom Data Setup Record Edit screen, where your updates will be displayed.</p>
	<p>Click this button to discard your entries and return to the Custom Data Setup Record Edit screen.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click this button to deactivate the record for the Custom Data Field</p>

Data Types for Record Setup

When you are setting up a field within a Custom Data Group, the setup screen you use will be unique for each different data type. For example, setting up a Boolean (true/false) field is very different from setting up a String type. The configuration page for each data type is illustrated below, with field descriptions.

Generally, you will not be able to change a data type once you have established it. Instead, you must deactivate a field and create a new one with the desired data type.

Exception: The system does allow a change from Integer to Currency data type.

String Data Type

Custom Data Setup Field Edit

String Data Type

Group ID om1

Field ID

Field Title

Part of unique key constraint

Show field on read only screen

Is required




Max Text Length

Custom Validation Expression




Custom Validation Message

Default Value

Display Order

String Data Type Field Descriptions	
Group ID	Read-only on this screen; supplied by your earlier input. This is the code for the group in which the Custom Data field is included.

Field ID	The system name to identify the field. Type a string containing 32 or fewer lower-cased alphanumeric characters.
Field Title	The label to be displayed to users on the field.
Part of unique key constraint (checkbox)	A unique constraint enforces the uniqueness of values in columns to prevent the entry of duplicate values. The uniqueness can be based on one or more columns. Null values are allowed. Check if this field should be a part of the unique constraint; else leave unchecked.
Show field on read only screen (checkbox)	Check to display the field on the read-only Custom Data screen; else leave unchecked. Leaving the box unchecked means the field will display only on the designated Client Edit screen. If your Custom Data Group contains many fields, it will be difficult to display all of them on the read-only screen because of horizontal space limitations.
Is required (checkbox)	Indicates whether data entry in this field is required.
Max Text Length	Select one of the two options available from the dropdown list: 64 characters or 7,750 characters.
Custom Validation Expression	To enforce validation of the data entered, you may create your own custom Regular Expression (RegEx). Note: Because ARIES maintains its own RegEx (regular expressions) for text and text areas, the custom RegEx can only be a subset of allowed characters for ARIES.
Custom Validation Message	Enter the message you would like to display to the end user if the data entered in this field does not meet the Custom Validation Expression above.
Default Value	Enter the default string value, if any.
Display Order	The order in which the Custom Data field will be displayed on the screen.
	Click this button to store your input and return to the Custom Data Setup Record Edit screen, where your updates will be displayed if you have checked the "Show field on read only" checkbox.
	Click this button to discard your entries and return to the Custom Data Setup Record Edit screen.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended. Click this button to deactivate the record for the field.

Integer Data Type

Note: Although generally a change in data type is not allowed, the system does allow a change from Integer to Currency data type.

Custom Data Setup Field Edit

Integer Data Type

Group ID om1

Field ID

Field Title

Part of unique key constraint

Show field on read only screen

Is required

Minimum Integer Value

Maximum Integer Value




Custom Validation Expression

Custom Validation Message

Default Value

Display Order

Integer Data Type Field Descriptions	
Group ID	Read-only on this screen; supplied by your earlier input. This is the code for the group in which the Custom Data field is included.
Field ID	The system name to identify the field. Type a string containing 32 or fewer lower-cased alphanumeric characters.
Field Title	The label to be displayed to users on the field.
Part of unique key constraint (checkbox)	A unique constraint enforces the uniqueness of values in columns to prevent the entry of duplicate values. The uniqueness can be based on one or more columns. Null values are allowed. Check if this field should be a part of the unique constraint; else leave unchecked.
Show field on read only screen (checkbox)	Check to display the field on the read-only Custom Data screen; else leave unchecked. Leaving the box unchecked means the field will display only on the designated Client Edit screen. If your Custom Data Group contains many fields, it will be difficult to display all of them on the read-only screen because of horizontal space limitations.
Is required (checkbox)	Indicates whether data entry in this field is required.

Minimum Integer Value	By default, the system supplies 0. Edit this value if needed.
Maximum Integer Value	By default, the system supplies 10000. Edit this value if needed.
Custom Validation Expression	To enforce validation of the data entered, you may create your own custom Regular Expression (RegEx). Note: Because ARIES maintains its own integer validation, range and custom RegEx can only be a subset of the normal integer validation.
Custom Validation Message	Enter the message you would like to display to the end user if the data entered in this field does not meet the Custom Validation Expression above.
Default Value	Not required. Enter the default integer value, if any.
Display Order	The numeric order of the Custom Data field's appearance on the screen.
	Click this button to store your input and return to the Custom Data Setup Record Edit screen, where your updates will be displayed if you have checked the "Show field on read only" checkbox.
	Click this button to discard your entries and return to the Custom Data Setup Record Edit screen.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended. Click this button to deactivate the record for the field.

Decimal Data Type

Custom Data Setup Field Edit

Decimal Data Type

Group ID om1

Field ID

Field Title

Part of unique key constraint

Show field on read only screen

Is required

Minimum Decimal Value

Maximum Decimal Value




Custom Validation Expression

Custom Validation Message

Default Value

Display Order

Decimal Data Type Field Descriptions	
Group ID	Read-only on this screen; supplied by your earlier input. This is the code for the group in which the Custom Data field is included.
Field ID	The system name to identify the field. Type a string containing 32 or fewer lower-cased alphanumeric characters.
Field Title	The label to be displayed to users on the field.
Part of unique key constraint (checkbox)	A unique constraint enforces the uniqueness of values in columns to prevent the entry of duplicate values. The uniqueness can be based on one or more columns. Null values are allowed. Check if this field should be a part of the unique constraint; else leave unchecked.
Show field on read only screen (checkbox)	Check to display the field on the read-only Custom Data screen; else leave unchecked. Leaving the box unchecked means the field will display only on the designated Client Edit screen. If your Custom Data Group contains many fields, it will be difficult to display all of them on the read-only screen because of horizontal space limitations.
Is required (checkbox)	Indicates whether data entry in this field is required.
Minimum Decimal Value	By default, the system supplies 0.00. Edit this value if needed.

Maximum Decimal Value	By default, the system supplies 10,000.00. Edit this value if needed.
Custom Validation Expression	To enforce validation of the data entered, you may create your own custom Regular Expression (RegEx). Note: Because ARIES maintains its own decimal validation, range and custom RegEx can only be a subset of the normal decimal validation.
Custom Validation Message	Enter the message you would like to display to the end user if the data entered in this field does not meet the Custom Validation Expression above.
Default Value	Not required. Enter the default integer value, if any.
Display Order	The numeric order of the Custom Data field's appearance on the screen.
	Click this button to store your input and return to the Custom Data Setup Record Edit screen, where your updates will be displayed if you have checked the "Show field on read only" checkbox.
	Click this button to discard your entries and return to the Custom Data Setup Record Edit screen.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended. Click this button to deactivate the record for the field.

Boolean Data Type

Custom Data Setup Field Edit

Boolean Data Type

Group ID om1

Field ID




Field Title




Part of unique key constraint

Show field on read only screen

Default Value Is Initially Checked

Display Order








Boolean Data Type Field Descriptions	
Group ID	Read-only on this screen; supplied by your earlier input. This is the code for the group in which the Custom Data field is included.
Field ID	The system name to identify the field. Type a string containing 32 or fewer lower-cased alphanumeric characters.
Field Title	The label to be displayed to users on the field.
Part of unique key constraint (checkbox)	A unique constraint enforces the uniqueness of values in columns to prevent the entry of duplicate values. The uniqueness can be based on one or more columns. Null values are allowed. Check if this field should be a part of the unique constraint; else leave unchecked.
Show field on read only screen (checkbox)	Check to display the field on the read-only Custom Data screen; else leave unchecked. Leaving the box unchecked means the field will display only on the designated Client Edit screen. If your Custom Data Group contains many fields, it will be difficult to display all of them on the read-only screen because of horizontal space limitations.
Default Value / Is initially checked (checkbox)	Indicates whether the checkbox is initially checked or unchecked by default on the user screen. Other data types will have different default options.
Display Order	The numeric order of the Custom Data field's appearance on the screen.
	Click this button to store your input and return to the Custom Data Setup Record Edit screen.
	Click this button to discard your entries and return to the Custom Data Setup Record Edit screen.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended. Click this button to deactivate the record for the field.

Date Data Type

Custom Data Setup Field Edit	
Date Data Type	
Group ID	om1
Field ID	<input type="text"/>
Field Title	<input type="text"/>
	<input type="checkbox"/> Part of unique key constraint
	<input type="checkbox"/> Show field on read only screen
	<input type="checkbox"/> Is required
Minimum Date Value	<input type="text" value="1/1/1980"/>
Maximum Date Value	<input type="text" value="7/8/2010"/>
	<input type="checkbox"/> Date must be in the range of the client's date of birth and date of death.
	<input type="checkbox"/> Allow date beyond the current date.
Default Value	<input type="text"/> <input type="checkbox"/> Default is Current Date.
Display Order	<input type="text" value="1"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Deactivate"/>	

Date Data Type Field Descriptions	
Group ID	Read-only on this screen; supplied by your earlier input. This is the code for the group in which the Custom Data field is included.
Field ID	The system name to identify the field. Type a string containing 32 or fewer lower-cased alphanumeric characters.
Field Title	The label to be displayed to users on the field.
Part of unique key constraint (checkbox)	A unique constraint enforces the uniqueness of values in columns to prevent the entry of duplicate values. The uniqueness can be based on one or more columns. Null values are allowed. Check if this field should be a part of the unique constraint; else leave unchecked.
Show field on read only screen (checkbox)	Check to display the field on the read-only Custom Data screen; else leave unchecked. Leaving the box unchecked means the field will display only on the designated Client Edit screen. If your Custom Data Group contains many fields, it will be difficult to display all of them on the read-only screen because of horizontal space limitations.
Is required (checkbox)	Indicates whether data entry in this field is required.
Minimum Date Value	By default, the system supplies 1/1/1980. Edit this value if a different default is desired.
Maximum Date Value	By default, the system supplies today's date in format MM/DD/YYYY. Edit this value if a different default is desired.

	<p>Note: Because ARIES maintains its own date range validation (1/1/1900 to 1/1/2050), the date range for these fields must be a subset of that range. Otherwise, an error message is displayed when you attempt to save the record.</p>
<p>Date must be in the range of the client's date of birth and date of death. (checkbox)</p>	<p>Check this box to require that the date entered be between the client's date of birth and the client's date of death. For clients who are not deceased (i.e., no date of death), checking this box affects only the lower limit of the date range. The upper limit remains defined by the other validation parameters.</p>
<p>Allow date beyond the current date. (checkbox)</p>	<p>Check this box for the system to allow the date entry to be beyond the system date.</p>
<p>Default Value</p>	<p>If desired, enter a default date value, format MM/DD/YYYY. If you make an entry here, do not check Default is Current Date.</p>
<p>Default is Current Date. (checkbox)</p>	<p>Determines whether the current date is the default date value. If you check this box, the system will delete any entry in the Default Value field.</p>
<p>Display Order</p>	<p>The numeric order of the Custom Data field's appearance on the screen.</p>
	<p>Click this button to store your input and return to the Custom Data Setup Record Edit screen, where your updates will be displayed if you have checked the "Show field on read only" checkbox.</p>
	<p>Click this button to discard your entries and return to the Custom Data Setup Record Edit screen.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click this button to deactivate the record for the field.</p>

Dropdown Data Type

Custom Data Setup Field Edit

Dropdown Data Type

Group ID om1

Field ID

Field Title

Part of unique key constraint

Show field on read only screen

Is required




Options separated by pipe |

Display 'Other' as an option, accompanied by a text box for input.

Default Value

Display Order

Dropdown Data Type Field Descriptions	
Group ID	Read-only on this screen; supplied by your earlier input. This is the code for the group in which the Custom Data field is included.
Field ID	The system name to identify the field. Type a string containing 32 or fewer lower-cased alphanumeric characters.
Field Title	The label to be displayed to users on the field.
Part of unique key constraint (checkbox)	A unique constraint enforces the uniqueness of values in columns to prevent the entry of duplicate values. The uniqueness can be based on one or more columns. Null values are allowed. Check if this field should be a part of the unique constraint; else leave unchecked.
Show field on read only screen (checkbox)	Check to display the field on the read-only Custom Data screen; else leave unchecked. Leaving the box unchecked means the field will display only on the designated Client Edit screen. If your Custom Data Group contains many fields, it will be difficult to display all of them on the read-only screen because of horizontal space limitations.
Is required	Determines whether the system will require a selection from the dropdown list you are creating.
Options separated by pipe 	Scrollable text field. List all the options that are to appear in the dropdown list you are creating. Separate these options with the pipe character . Do NOT use the <Enter> key and attempt to place each dropdown value on a separate line. Simply type your

	<p>dropdown values one after the other, separated by the pipe character.</p> <p>Example: Blue Green Yellow Orange Red</p> <p>Note: ARIES maintains its own RegEx validation.</p>
<p>Display 'Other' as an option, accompanied by a text box for input. (checkbox)</p>	<p>Check this box to include the selection "Other" in the dropdown list you are creating, and to activate a textbox for required explanation if the user selects "Other."</p> <p>Note: Do NOT include "Other" in the dropdown options above.</p>
<p>Default Value</p>	<p>If desired, enter a default date value from among the dropdown options you are creating.</p>
<p>Display Order</p>	<p>The numeric order of the Custom Data field's appearance on the screen.</p>
	<p>Click this button to store your input and return to the Custom Data Setup Record Edit screen.</p>
	<p>Click this button to discard your entries and return to the Custom Data Setup Record Edit screen.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click this button to deactivate the record for the field.</p>

Hyperlink Data Type

Special Procedures for Hyperlink Data Type

These procedures cover field descriptions and special steps for creating, editing and encrypting Custom Data fields of hyperlink data type.

Given appropriate security permissions, ARIES allows system administrators at any level to define custom links to external websites. The links can be displayed on any Client read-only or Client Edit screen and may include an encrypted query string value for the target external system to use in establishing client context.

Creating a Link

To create a hyperlink, Admins use the Custom Data Setup functionality, accessible via link from the Agency Utilities tab of an agency's profile. When you click on the Custom Data Setup link on Agency Utilities, the read-only Custom Data Setup screen appears.

AGENCY INFO	FUNDING & CONTRACTS	SERVICES PROVIDED	RSR/RDR	LAB BATCH DATA ENTRY	AGENCY UTILITIES
					AGENCY UTILITIES ARIES
4800 - Texas Department of State Health Services					
Custom Data Setup New					
Group Name	Code	Longitudinal	Agency	Field Count	
Clinical Trial Status	cts	false	4800 - Texas Department of State Health Services	1	Edit
Education Level	el1	false	4800 - Texas Department of State Health Services	3	Edit
Fasting Lipids	fl1	true	4800 - Texas Department of State Health Services	6	Edit
Satisfaction Survey	ssrv	true	4800 - Texas Department of State Health Services	5	Edit

Click on the **Edit** button for the group in which you will create the new custom link. This example uses the Clinical Trial Status group. A Custom Data Setup Record Edit screen appears.

Custom Data Setup Record Edit

Group Name:

Group Code:

Allow multiple records for each client

Display Order:

[Save + Done](#) [Cancel](#) [Deactivate](#)

Field Definition New

Field Code	Field Title	Type	Required	Show on Read Only	Display Order	Part of Unique Key	Validation	
currentlyintrial	Currently in a Clinical Trial	Boolean	False	True	1	False	tbd	Edit

Click the **New** button adjacent to "Field Definition." A Custom Data Setup Field Edit screen appears, displaying data-type options. A Custom Data Setup record Edit screen appears.

Custom Data Setup Field Edit

HyperLink Data Type

Group ID: om1

Field ID:

Field Title:

Display Link on Page:

Url:

Query String ClientID Field:

Shared Key for Query String Encryption:

Display Order:

[Save](#) [Cancel](#) [Deactivate](#)

Select the "Hyperlink" radio button and click **Save**. An additional Custom Data Setup Field Edit screen appears. It is specific to configuration of a hyperlink.

Custom Data Setup Field Edit

HyperLink Data Type

Group ID cts

Field ID

Field Title


Display Link on Page



Url

Query String ClientID Field

Shared Key for Query String Encryption

Display Order

Group ID	Read-only on this screen; supplied by your earlier input. This is the code for the group in which you are adding the custom link.
Field ID	Unique ID for link (not in current use).
Field Title	Label for the link, to be displayed on the designated Client screen.
Display Link on Page	Read-only or Edit screen of ARIES Client application where link is to be displayed. Make a selection of this screen from the dropdown list.
Url	The URL of the link. Include "http" or "https" and any necessary query string other than the client identifiers below.
Query String ClientID Field	<p>An Admin user with appropriate permissions can choose an ARIES identifier from the dropdown to include in the query string. Options are AriesID, AgencyClientID1 and AgencyClientID2 (as displayed on the Agency Specifics screen for the client).</p> <p>Note: AgencyClientID1 and AgencyClientID2 may not be unique, and the user will need to monitor for duplicates or missing IDs. In addition, while AriesID is unique and cannot be manually edited, it can change as the result of a Duplicate Merge; therefore, agencies will need to use the Duplicate Merge History Report to monitor changes in AriesID.</p>
Shared Key for Query String Encryption	A user-specified key to encrypt the client ID.
Display Order	If more than one link appears on a page, use this value to control the order of appearance.
	Click this button to store your input and return to the Custom Data Setup Record Edit screen, where your updates will be displayed.

	Click this button to discard your entries and return to the Custom Data Setup Record Edit screen.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Click this button to deactivate the record for the field.</p>

Encrypting Client ID

The Client ID in the query string will always be encrypted using the algorithm configured by system administrators. The configuration keys are "EncryptorKeyExternal" and "EncryptorKeyExternalAlgorithmName", set in local.web.config in the ARIESWS directory. The current algorithm is 3DES.

Below is an example of a URL with an encrypted querystring:

```
http://www.ibm.com/?args=UIgrj3D0fJwr8BXgVShConXfjrkc8TpYLY16Xnxwg/5M3WCBNV04fNlEDu/W1185
```

ARIES passes the part beginning with "args".

Decrypting Client ID

To decrypt the value, use the same algorithm and initialization vector byte array that ARIES uses, plus the Shared Key specified in the setup. Unencrypted, the string looks like this (with AriesID):

```
clientID=10000002|utc=7/9/2010 11:31:29 PM
```

There are two key-value pairs in the encrypted string, separated by a pipe |:

clientID	AriesID: int32 AgencyClientID1: string (64) AgencyClientID2: string (64)
utc	Created using .NET DateTime.UtcNow.ToString() formatted to US default pattern. Use this value to expire requests, if desired.

Test Encryption/Decryption

Below are test values to verify the encryption/decryption implementation:

Algorithm	3DES
Initialization Vector	25, 9, 12, 31, 31, 15, 15, 64, 23, 11, 40, 42, 18, 21, 24, 22
String to Encrypt	clientID=10000002 utc=7/9/2010 11:31:29 PM
Shared Key	100000
Result	

4.7.9 Referral Agencies

The Referral Agencies utility allows administrative users to manage the list of agencies to which their agency refers clients. Your entries on this screen will be displayed as options in the Refer To Agency dropdown list on the Referral Edit screen.

Notes

- Certain features may or may not be available depending on your installation's configuration. Check with your System Administrator for additional information.
- The Referral Agencies dropdown list shows only Care agencies.
- A deactivated agency created in the "Referral Agencies" screen can be re-added as a referral agency for the current user's agency.
- Each agency can serve as its own referral agency.

To access the Agency Referrals screen, click Agency Utilities, then Agency Referrals.

To add a new referral agency, click the **New** button. Two windows appear at the bottom of the screen.

- In the left window, click the down arrow to view a list of available agencies. Select from the list.
- If the desired agency does not appear on the dropdown list, select "Other." You are then required to type the name of the agency in the right window.
- Click **Save** to save your entries and return to the read-only screen, where the name of the new agency is now displayed. Or click **Cancel** to return to the read-only screen without saving your entries.

To edit an existing referral agency, click the **Edit** button opposite the agency's name on the read-only screen. Two windows appear at the bottom of the screen. The left window is populated with the name of the agency you are editing.

- In the left window, click the down arrow to view a list of available agencies. Select from the list. Or, if you have selected "Other," type the name of an agency in the right window.

- Click **Save** to save your entries and return to the read-only screen, where the name of the new agency is now displayed. Or click **Cancel** to return to the read-only screen without saving your entries.
- Or Click the **Deactivate** button to deactivate the record. You will be prompted to confirm the deactivation. To confirm the deactivation, click **OK**. You will be returned to the read-only Referral Agencies screen, where the deactivated referral agency will no longer be displayed. Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible. If you do **not** want to deactivate the record, click **Cancel** and you will be returned to the read-only screen.

Non-ARIES Agencies

As displayed on the Referral Agencies screen, non-ARIES agencies are text descriptions with an Agency name.

When you have completed your updates on Referral Agencies, click the **Done** button. You will be returned to the Agency Utilities menu.

4.7.10 Propagate User Group Permissions

Typically, global propagation of a single permission is necessary only when new permissions are added to the system, or if some change in policy dictates that a permission needs to be revoked. The current user permission propagation functionality propagates all permissions for a given user group, thereby overwriting any custom permissions that agencies have set up for particular users. The "Propagate User Permissions" utility gives users the ability to only propagate selected permissions.

This utility is used to grant or revoke individual, granular permissions for all users across one or more agencies and one or all User Groups. It may be run either at the AA/Partner agency level, or for an individual Provider agency. If run at the AA/Partner level, all agencies that the AA/Partner manages will be included in the update.

Navigate to the Propagate User Group Permissions page by selecting the Propagate User Group Permissions link on the Agency Utilities page.

Propagate User Group Permissions for ARIES Partner

Agency Shasta Test Services ▼

Update administered agencies

User Group Case Manager ▼

All User Group

Available Permissions

- Demographic Detail / Change - Grant
- Demographic Detail / Change - Revoke
- Demographic Detail / Create - Grant
- Demographic Detail / Create - Revoke
- Sexual Orientation / Read - Grant
- Sexual Orientation / Read - Revoke
- Sexual Orientation / Change - Grant
- Sexual Orientation / Change - Revoke
- Related or Affected Individuals / Read - Grant
- Related or Affected Individuals / Read - Revoke
- Related or Affected Individuals / Change - Grant
- Related or Affected Individuals / Change - Revoke
- Related or Affected Individuals / Create - Grant
- Related or Affected Individuals / Create - Revoke
- Related or Affected Individuals / Obsolete - Grant

Add >

< Remove

Selected Permissions

- Demographics Tab / Change - Grant
- Demographic Detail / Read - Revoke

Save
Cancel





Once on the utility page, select the agency for which you would like to propagate permissions. If you have selected an Administrative Agency and would like to include all agencies under the AA in the propagation, select the 'Update administered agencies' checkbox. Next, select the user group for which the permissions propagation should apply. Please note that if you select the 'All User Group' checkbox, the user group dropdown will become inactive.

Once you have established the agency or agencies and the user group or groups for which you would like to grant or revoke permissions, you must select the desired permissions from the list of 'Available Permissions.' For each selection, use the Add button to move the permission to the 'Selected Permissions' list. Conversely, if you would like to remove a permission from the 'Selected Permissions' list, use the Remove button.

To proceed with the granting or revoking of permissions, select Save. Selecting Cancel will discard all changes and return you to the Agency Utilities screen.

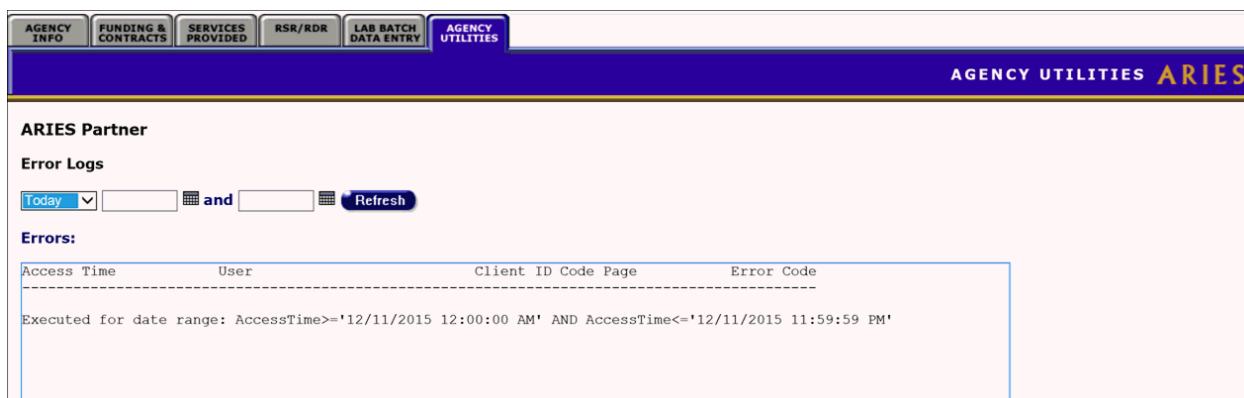
Please Note: Permissions are granular and do NOT cascade. For example, to grant an Obsolete permission, you will need to grant permission for Read, Change and Create as well.

Agency	Contains both Provider agencies and AA/Partner agencies. If an AA/Partner agency is selected, all of the agencies that they manage will be included in the scope of users to apply permissions to. This dropdown is context-sensitive to the user who logs in. For example, if the user belongs to a Provider Agency, then only their own agency will be shown in the dropdown. If the user belongs to an AA Agency, then all the agencies that they manage will be shown, plus their own agency.
Update administered agencies checkbox	Check this box to propagate across ALL managed agencies under an AA/Partner Agency.
User Group	Contains a list of all User Groups

All User Groups checkbox	Check this box to propagate across ALL User Groups for the selected agency. If this is checked, the User Group dropdown is disabled.
Available permissions	Contains Grant and Revoke options for each possible permission. Note, as consistent with the current rules in ARIES, a user may not grant or revoke permissions that they do not have themselves, so these permissions are excluded from the 'Available permissions' list box.
Selected permissions	Contains items selected from the 'Available Permissions' list.
	The Add button moves the selected element from the 'Available Permissions' list to the 'Selected Permissions' list.
	The Remove button moves the selected element from the 'Selected Permissions' list to the 'Available Permissions' list.
	Selecting the Save button makes permissions changes to all users for the select agency(s) and user group(s).
	Selecting the Cancel button returns the user to the Agency Utilities menu page, without saving.

4.7.11 Error Log

Previously, when a user experienced an error, the only way to see the nature of that error was to access ARIESAdmin. Now, users with appropriate permissions are able to view ARIES error logs by selecting the Error Log link on the Agency Utilities screen.



4.8 Creating an Agency

If you are part of an administrative agency or are a partner and you have the proper permissions, you can create an agency.

- From the [ARIES menu bar](#) at the top of the ARIES screen, choose the **Find > Agency** menu item, which takes you to the Agency Search screen.

Agency Search

Search for ARIES agencies. You may use the wildcard *.

Agency

Services

Display **results**

Search >

- Confirm that the agency is not in the system by entering the name of the agency you wish to create and clicking the **Search** button.

Agency Search

- No records found. Try broadening your search.

Search for ARIES agencies. You may use the wildcard *.

Agency

Services

Display * **results**

Search > **New Agency**

- After confirming that the agency name is not in the system, click the **New Agency** button, to display the Agency Edit screen.

Agency Edit for 0000 - Wellness 4 Life



Agency Full Name	<input type="text"/>	Contact Name	<input type="text"/>
Agency Short Name	<input type="text"/>	Title	<input type="text"/>
Website	<input type="text"/>	Email	<input type="text"/>
Acuity Tool Link	<input type="text"/>	Phone	<input type="text"/>
Taxpayer ID	<input type="text"/>	Fax	<input type="text"/>
Agency Provider ID 1	<input type="text"/>	EMA Number	<input type="text"/>
Agency Provider ID 2	<input type="text"/>	<input type="checkbox"/> HRSA Grantee	
Notes	<input type="text"/>	Agency Type	Provider Agency <input type="text"/>
		Domains	<input checked="" type="checkbox"/> CARE <input checked="" type="checkbox"/> Prevention

Agency record is active

Complete the fields as follows. Fields marked with a red asterisk (*) are required.

Agency Full Name	Enter the agency's entire name.
Agency Short Name	Enter an abbreviated version of the agency and name. Example: for the San Francisco AIDS Foundation, you might use "SFAF." This short name will be used in screens and reports where the full agency name might not format correctly.
Website	If the agency has a website, enter it in the text field. Include "http://" at the beginning; e.g., if the website is www.ryanwhitecenter.org, you would enter "http://www.ryanwhitecenter.org" in the text field.
Acuity Tools Link	Acuity tools are used to measure the severity of a disease. As different agencies employ different acuity systems, it is important that the tool each agency uses be available to help standardize case management services. Enter the agency's link including "http://" at the beginning; e.g., if the website is www.ryanwhitecenter.org/acuity, you would enter "http://www.ryanwhitecenter.org/acuity" in the text field.
Taxpayer ID	Enter the nine-digit taxpayer ID. Use the format 99-1234567. For some smaller agencies, you can enter a Social Security number. Use the format 123-45-6789.
Agency Provider ID 1	Enter any identification code provided by the agency's administrative agency.
Agency Provider ID 2	Enter any additional identification code provided by the agency's administrative agency.
Contact Name	Enter the name of the contact person for financial and contract matters. This is often the director or financial officer.
Title	Enter the title of the contact person.
Email	Enter the email address of the contact person.

Phone	<p>Enter the phone number of the contact person.</p> <p>After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345</p>
Fax	<p>Enter the fax number of the contact person.</p>
EMA Number	<p>Enter the Eligible Metropolitan Area (EMA) number of the agency.</p>
HRSA Grantee	<p>Check this box if your agency is a Health Resources and Services Administration (HRSA) grantee.</p>
Notes text box	<p>Enter any additional agency information in the Notes text box.</p>
Agency Type	<p>Make a selection from the Agency Type dropdown (e.g., Provider Agency or Administrative Agency).</p> <p>Note: Because AA's and Super AA's may not have contracts, an agency that has any contracts or clients cannot be assigned to any agency type except Provider Agency. If a user attempts to assign to any other type, an error message appears: "This agency has contracts or clients. Administrative agencies may not have contracts or clients."</p>
Domains	<p>Select the checkbox for Care, Prevention, or both.</p>
Agency record is active	<p>If this checkbox is visible, check it or leave it unchecked as appropriate.</p> <p>Note on agency inactivation: Users with appropriate permissions can mark an agency as inactive (rather than Deactivated). When an agency is marked inactive, the agency's information and records are available for reporting and for viewing, but no new records can be added to that agency.</p> <p>This feature is intended for the Texas installation, but may be optionally enabled for other installations in the future. A configuration parameter is available in ARIESAdmin to control whether this feature is enabled.</p> <p>This option works as follows:</p> <ul style="list-style-type: none"> • If the option is set to False, the "Agency record is active" checkbox on the Agency Edit screen is hidden and the field is set to true by default. A newly created agency has this value set to True by default. • An Agency Update will update the "Agency record is active" checkbox only if the option is enabled. • The system's validation rules for this field are executed only if the option is set to True. • In all other situations, the "Agency record is active" flag is ignored regardless of its value.

	Click this button to save your updates and proceed to the Agency Site screen.
	Click the Cancel button to return to the Agency Info screen without saving your entries.

4.8.1 Creating an Agency Site

When you click **Save + Next** on the Agency Edit screen, you are taken to the Agency Site screen. ARIES automatically fills in the name of the agency you are creating at the top of this screen.



Agency Site for December Care

Site Name *

Site Code

Street 1 *

Street 2

City *

State & ZIP *

County *

Geog Area/HSDA

Phone 1 *

Phone 2 *

Next Done New

Agencies can provide services from multiple sites. To create a new site for an agency, click the **New** button to display the Agency Site Edit screen.

Agency Site for December Care

Site Name *

Site Code

Street 1 *

Street 2

City *

State & ZIP *



County *

Geog Area/HSDA

Phone 1 *

Phone 2 *

Site Name	Enter the site name.
Site Code	Enter the site code.
Street 1	Enter the street address.
Street 2	Optional. Enter an additional street address.
City	Enter the city of the site.
State & ZIP	Use the dropdown to select the state of the site. In the adjacent window, enter the ZIP code of the site.
County	Use the dropdown to enter the county of the site. The list is set to display the counties in the state you selected.
Geog Area/HSDA	Use the dropdown list to enter this site's geographic area or Health Services Delivery Area (HSDA).
Phone 1	<p>Enter the phone number of the site. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345</p> <p>Use the dropdown to identify the phone number as the main number, or fax number, or a telecommunications device for the hearing impaired (TTY).</p>
Phone 2	Optional. Enter a second phone number. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345

	Use the dropdown to identify the phone number as the main number, or fax number, or a telecommunications device for the hearing impaired (TTY).
	Click this button to save your input and return to the Agency Site screen, which now displays the new site.
	Click the Cancel button to return to the Agency Site screen without saving your input.

To Enter Additional Sites

- Click the **New** button again and repeat the above instructions.

4.8.2 Creating an Agency Funding Source

When you are entering or editing contract information, be as accurate and complete as possible, to help facilitate budgeting and tracking.

From the ARIES menu bar at the top of the screen, select **Find > Agency**. The Agency Search screen appears.


Agency Search

Search for ARIES agencies. You may use the wildcard *.

Agency

Services

Display **results**



- Enter the name of your agency in the Agency text field. As a shortcut, you can enter the first few letters of the agency and use the "*" wildcard. Example: if you wanted to find the Ryan White Center, you would enter "ryan*."
- Click **Search**.
- On the Agency Search Result screen, click the name of your agency to get to the Agency Info Screen.
- On Agency Info, click the Funding & Contracts tab.

AGENCY INFO	FUNDING & CONTRACTS	SERVICES PROVIDED	RSR/RDR	LAB BATCH DATA ENTRY	AGENCY UTILITIES
-------------	---------------------	-------------------	---------	----------------------	------------------

FUNDING SOURCES & CONTRACTS **ARIES**

Cafe Late

Funding Sources & Contracts [Edit](#)

Contract Name	Funding Source	Contract #	Start Date	End Date	Amount
Copied Contract	Ryan White Title II	1	1/1/2009	12/31/2010	\$1.00
Ryan White 2	Ryan White Title II	777288	4/1/2008	3/31/2009	\$188,000.00
Original Contract	Ryan White Title II	1	1/1/2008	12/31/2009	\$1.00
Ryan White	Ryan White Title II	777777	4/1/2006	3/31/2007	\$188,000.00

Note: Make sure all of your funding sources, including federal, state, county, city and private sources are entered on this screen.

On the Funding & Contracts tab, click the **Edit** button for a read-only display of the agency's funding sources, grantee numbers and any notes.

Funding Sources Edit for Cafe Late

Please enter all the funding sources for this agency.

Funding Source	Grantee Number	Notes
Ryan White Part B	4499-88	

[Edit](#)
[New](#)

[Next](#) [Done](#)

To Add a New Funding Source

- Click the **New** button to display the Funding Sources Edit screen.



Funding Sources Edit for Cafe Late

Please enter all the funding sources for this agency.

Funding Source	Grantee Number	Notes
Ryan White Part B <input type="text" value="CA State Office of AIDS"/>	4499-88	
If Other:	<input type="text"/>	<input type="text"/>

[Save](#)
[Cancel](#)

Complete the fields as follows.

Funding Source	Use the dropdown to select the funding source. If the funding source is not listed, enter it the If Other field.
Grantee Number	Enter the grantee number.
Notes text box	Enter any additional information in the Notes text box. This is a scrollable box.
If Other	If you selected "Other" from the Funding Source dropdown list, you must make an entry in the "If Other" field.
	Click this button to save your input and return to the Funding Sources Edit screen.
	Click the Cancel button to return to the read-only Funding Sources Edit screen without saving your input.

4.8.3 Creating an Agency Contract



When you click **Next** on the Funding Sources edit screen, you are taken to the read-only Contracts Edit screen.

Click **New** to open an editable row on the screen.

Note: The **New** button is not visible to users in Admin Agencies or Super AA's. However, the button remains visible to Admin or Super AA users if they are emulating an agency user.

Complete the fields as follows.

Contract Name	Enter the contract name. It is useful to include the contract year of the contract name to distinguish renewals of contracts, e.g., "Dental Services 11" for the contract in fiscal year 2011.
Funding Source	Use the dropdown to select the funding source. If the funding source is not listed, you can add it in the Agency Funding Sources screen.
Contract #	Enter the contract number.
Start Date	Enter the start date of the contract. Use the format MM/DD/YYYY.
End Date	Enter the end date of the contract. Use the format MM/DD/YYYY.
Amount	Enter the dollar amount of the contract.
Is Ryan White Funded	Check this field if the contract contains <i>any</i> funding from the Ryan White HIV/AIDS Program, regardless of other sources.
Exclude for New Services	Checking this box prevents the contract from displaying on the Services Provided page Contract dropdown list. Existing services are still editable.
Display Order	Assign a numeric Display Order, so that the contract dropdown list on the Service Edit page can be sorted by Display Order as an alternative to alphabetical sorting.

	<p>Click this button to save your entries and return to the Contracts Edit screen, which now displays the new contract.</p>
	<p>Click the Cancel button to return to the Contracts Edit screen without saving your input.</p>

To Add More Contracts

- Click the **New** button again and repeat the above instructions.

When you have completed entering all the new contracts:

- Click the **Edit Services** button to go to the Primary Services screen
OR
- Click **Done** to go to the Funding & Contracts tab if you wish to add the services later.

4.8.4 Creating Agency Primary Services

Important Note: When setting up a single contract, do not check service boxes for more than one program. If you do, two programs will display on the program dropdown when only one program should appear. Since programs are tied to contracts, each contract should represent just one program.

For example, an agency that receives both Ryan White Part A and Ryan White Part C funds should set up two separate contracts, designating one as Part A and the other as Part C. In this example, you would need to be especially alert because, in setting up the services, you would make selections for each contract from the same "Ryan White" listing. You would need to keep in mind which contract you are working in. That is, make sure you are working in the Part C contract when checking the "Ryan White" service boxes for Part C; make sure you are working in the Part A contract when checking the appropriate boxes under "Ryan White" for Part A.

Setting up a separate contract for each program contributes to the accuracy and efficiency of reports.

If you are adding services at the same time as you are creating a new agency, access the Primary Services screen as follows:

- Click the **Edit Services** button on the Contracts Edit screen.

If you are adding services at a later time than when you created the new agency, access the Primary Services screen as follows:

- From the ARIES menu bar at the top of the ARIES screen, choose the Find > Agency menu item, to display the Search screen.
- Search for the agency you wish to add services for, which will take you to the Agency Info tab.
- From the Agency Info tab, select the Funding & Contracts tab.
- On the Funding & Contracts tab, click **Edit** to go to the Funding Sources Edit screen.

- On the Funding Sources Edit screen, click **Next** to go to the Contracts Edit screen.
- On the Contracts Edit screen, click the **Edit Services** button to add new services.

Primary Services Edit for The September Agency
for RWS

Please check each category of service your agency provides for the contract.
In the next screen you will be able to add custom categories.

RYAN WHITE

Outpatient/Ambulatory Medical Care

- CD-4 T-Cell Count
- Dermatology
- Infectious Diseases
- Laboratory Service
- Neurology
- Ob/Gyn
- Oncology
- Ophthalmology
- Other Specialty
- Outpatient/Ambulatory Medical Care
- Radiology

CARE-HIPP

Outpatient/Ambulatory Medical Care

- CD-4 T-Cell Count
- Dermatology
- Infectious Diseases
- Laboratory Service
- Neurology
- Ob/Gyn
- Oncology
- Ophthalmology
- Other Specialty
- Outpatient/Ambulatory Medical Care
- Radiology

Substance Abuse Services

- Detox
- Residential Treatment
- Substance Abuse Services - Residential

Treatment Adherence Counseling (non-medical)

- Treatment Adherence Counseling (non-medical)

STATE-SPECIFIC SERVICES

Buddy/Companion Services

- Buddy/Companion Services

Child Welfare Services

- Child Welfare Services

Client Advocacy

- Client Advocacy

Referrals to Clinical Research

- Referrals to Clinical Research

Respite Care

- Affected Child (Less Than 13)

Transportation

- Medical
- Non-Medical



Other Services

- Other Services
- Emergency-House Items
- Employment Assistance
- Volunteer Services Direct Service
- Volunteer Services Support

Check all the services associated with the contract.

- To add a service, click on the box.
- To delete a service, click on the box with the checkmark to delete the checkmark.

After checking all the services, click on one of the following:

	Click this button to save your input and proceed to the Agency Subservices Edit screen, which displays the default subservices for each primary service checked.
	Click the Cancel button to return to the read-only Contracts Edit screen without saving your input.

4.8.5 Creating Agency Subservices

Notes

On the Agency Subservices Edit page, you will receive warning messages if the following conditions exist:

- The sum of the Budget columns for the contract exceeds "Amount" on the contract record. The warning message is: "Sum of budgets for Subservices (\$nn,nnn) should not exceed Contract amount (\$nn,nnn)."
- The sum of the "UOS Goal" columns for the contract exceeds "UOS Goal" on the contract record. The warning message is: "Sum of UOS Goal for Subservices (nn,nnn) should not exceed Contract UOS Goal (nn,nnn)."

These messages are informational only; they would not prevent the user from saving the record.

The Agency Subservices Edit screen displays the default subservices for each primary service checked.

Agency Subservices Edit for Cafe Late							
for Ryan White							
You may divide the services checked in the previous page into finer categories, specific to your agency.							
Service	Unit	Default Quantity	Default Price	UOS Goal	UDC Goal	Budget	Notes
Care Services Program (RW Part B) -> Outpatient/Ambulatory Medical Care -> CD-4 T-Cell Count	Test	1.00	\$0.00	0	0	\$0.00	Edit Add
Care Services Program (RW Part B) -> Outpatient/Ambulatory Medical Care -> Dermatology	15 Minutes	1.00	\$0.00	0	0	\$0.00	Edit Add
Care Services Program (RW Part B) -> Outpatient/Ambulatory Medical Care -> Laboratory Service	Test	1.00	\$0.00	0	0	\$0.00	Edit Add
Care Services Program (RW Part B) -> Outpatient/Ambulatory Medical Care -> Neurology	15 Minutes	1.00	\$0.00	0	0	\$0.00	Edit Add
Care Services Program (RW Part B) -> Outpatient/Ambulatory Medical Care -> Outpatient/Ambulatory Medical Care	15 Minutes	1.00	\$0.00	0	0	\$0.00	Edit Add



To Add a New Subservice

- Click **Add** in the row where you wish to add a subservice. The Agency Subservice Edit screen displays for that row.

Agency Subservices Edit for 0000 - Wellness 4 Life							
for 06-07 RW 1							
You may divide the services checked in the previous page into finer categories, specific to your agency.							
Service	Unit	Default Quantity	Default Price	UOS Goal	UDC Goal	Budget	Notes
Ryan White -> Outreach Services -> Outreach Services Outreach Services - MAI - African American	Contact	1.00	\$476.22	110	12	\$52,384.00	
Outreach Services	Contact	1.00	0.00	0	0	0	Save Cancel
Ryan White -> Psychosocial Support Services -> Other Counseling Individual	15 Minutes	1.00	\$40.23	109	14	\$4,379.00	

Complete the fields as follows.

Service text box	Enter the type of subservice. This is a scrollable field.
Unit	Use the dropdown to select the quantifiable unit of service. Example: If the service were nutritional education, the units might

	be hours; if it were food service being provided, the units might be meals.
Default Quantity	The standard number of units provided for a client. Example: If a standard nutrition information session took two hours to give, the default quantity would be "2." Note: When entering a service line item in an Edit Service screen the staff person enters the actual number of units supplied.
Default Price	The cost per unit of service. Example: Meals might cost \$5.00 per unit. Enter the dollar amount without the \$ or commas. They will automatically be supplied once you tab out of the field.
UOS Goal	The Units of Service Goal. This refers to the total number of units planned for this service under this contract. Example: If bus tokens were the service provided, the UOS Goal might be 10,000 bus tokens during the contract year. The default unit of service (UOS) for most service categories is "15 minutes." However, some service categories have different units of measurement such as "test" or "visit." Because the "Other Services" categories are a mixture of diverse services, the units of measurement are varied.
UDC Goal	The Unduplicated Clients Goal. This refers to the number of discrete clients expected to receive this service during the contract year. Using the previous bus token example, if each client were eligible for 10 bus tokens, the UDC Goal would be 1,000.
Budget	The funds available in the contract for this subservice. Enter the dollar amount without the \$ or commas. They will automatically be supplied once you tab out of the field.
Notes	Any additional information regarding the service. This is a scrollable field.
	Click this button to save your input and return to the Agency Subservices Edit screen, which now displays your input.
	Click the Cancel button to return to the Agency Subservices Edit screen without saving your input.

4.8.6 Creating an Admin Account

Once you have created a new agency, you are prompted to create one by the appearance of a **Create Admin Acct** button on the Agency Info screen.

From the Agency Info tab:

- If you have the proper permissions level, the **Create Admin Acct** button displays to prompt you to create an ARIES administrator account.

Note: The administrator you assign should be someone responsible for the agency's advanced ARIES functions. Example: If you were creating an administrative agency, the administrator would be responsible for creating new agencies.






- Click the **Create Admin Acct** button to display the Staff Edit screen.

Complete the fields as follows.

Agency	Select the agency name from the dropdown list.
Last Name	Enter the administrator's last name. This is a required field.
First Name	Enter the administrator's first name. This is a required field.
Title	Enter the administrator's title, if applicable.
Employment	Use the dropdown list to select whether the administrator is Full Time, Part Time or a Volunteer.
FTE	For full-time staff enter 1 as the Full-Time Equivalent (FTE).

	<p>For part-time and volunteer staff, enter the proportion of the Full Time Equivalent (FTE) as a number between 0 and 1 in the accompanying text field.</p> <p>Example: If the administrator works half time, enter .5 in the text field.</p>
Phone	<p>Enter the administrator's phone number. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number.</p> <p>Example: 925-555-1212 12345</p>
Fax	<p>Enter the administrator's fax number.</p>
Email	<p>Enter the administrator's email address.</p>
Primary Site	<p>Use the dropdown to select which location is the administrator's primary work site. This is a required field.</p>
Initial/Short Name	<p>Enter an abbreviated version of the administrator's name.</p> <p>Example: For Mary Jones, use "MJ." This short name will be used in screens where their full name might not correctly. This is a required field.</p>
Home Page	<p>Use the dropdown to select the screen that will appear when the staff person logs in. The default screen is the ARIES welcome screen. Select the home page that the administrator will visit most frequently. This is a required field.</p>
ARIES Login	<p>Enter the administrator's login ID. This is a required field.</p> <p>Note: The login ID must be 8-32 characters in length and must use only letters and numbers. Example: "maryj" is not an acceptable login, but "maryjones" or "maryj222" is acceptable.</p>
Password	<p>Enter the administrator's password. You must reenter the password identically in the Confirm Password field below.</p> <p>Note: the new password must be 6-32 characters long and include:</p> <ul style="list-style-type: none"> At least one uppercase character. At least one lowercase character. At least one number. At least one special character (except for the \$, %, ^, and *). <p>Example: "Rover7" is not an acceptable password, but "Rover7@" or "#2reVer9" is. This is a required field.</p>
Confirm Password	<p>Enter the new password identically to the above field. This is a required field.</p>
User Group	<p>Use the dropdown to select Agency ARIES Administrator.</p>

	Note: If you are creating an administrative agency, select Administrative Agency ARIES Administrator. This is a required field.
Challenge Question	The field is not currently active.
Challenge Answer	The field is not currently active.
Notes text box	Enter any additional agency information in the Notes text box.
	<p>Click this button to save your input and proceed to the Staff Permissions Edit screen to customize the Admin user's permissions.</p> <p>Note that the user group is Agency ARIES Administrator. This group is granted the standard permissions for an agency administrator.</p> <p>Check or uncheck any categories as needed to customize the user's permissions; or simply leave permissions unchanged and click the Save button at the bottom of the screen.</p>
	Click this button to save your entries and proceed to the read-only Staff Detail screen for the user.
	Click the Cancel button to discard your entries and go to the read-only Staff Detail screen for the user.

For more details, see the [Staff Edit](#) and [Permissions](#) sections of Client Help.

This completes the steps in setting up a new agency.

4.9 Changing Agency Information

To access Agency Edit to change your agency information, from the ARIES menu bar at the top of the screen, select **Find > Agency**. The Agency Search screen appears.

Agency Search

Search for ARIES agencies. You may use the wildcard *.

Agency

Services

Display **results**

[Search >](#)

- Enter the name of your agency in the Agency text field. As a shortcut, you can enter the first few letters of the agency and use the "*" wildcard. For example, if you wanted to find the Ryan White Center, you would enter "ryan*."
- Click **Search**. The Agency Info screen displays.

AGENCY INFO
FUNDING & CONTRACTS
SERVICES PROVIDED
RSR/RDR
LAB BATCH DATA ENTRY
AGENCY UTILITIES

Clear View Mission

Contact Information [Edit](#)

<p>Main 2000 Market St Los Angeles, CA 94110 415-458-2500 (Main) 415-458-2500 (Fax)</p> <p>Contact: SysAdmin sysadmin@partner.gov</p> <p>Find Staff Notes: Case Management Dept. 555-555-2899 ext. 230</p>	<p>Castro 300 Castro St San Francisco, CA 94114 415-444-2500 (Castro) 415-444-2500 (Fax)</p>
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- If you are taken to the Agency Search Result screen, click the name of your agency to go to Agency Info screen.

To Edit Existing Agency Information

- Click the **Edit** button, which takes you to the Agency Edit screen.





Agency Edit for 0000 - Wellness 4 Life

<p>Agency Full Name <input type="text" value="0000 - Wellness 4 Life"/></p> <p>Agency Short Name <input type="text" value="W4L"/></p> <p>Website <input type="text"/></p> <p>Acuity Tool Link <input type="text"/></p> <p>Taxpayer ID <input type="text" value="12-3456789"/></p> <p>Agency Provider ID 1 <input type="text"/></p> <p>Agency Provider ID 2 <input type="text"/></p> <p>Notes <input type="text"/></p> <p><input checked="" type="checkbox"/> Agency record is active</p>	<p>Contact Name <input type="text" value="Kellie Norcott"/></p> <p>Title <input type="text" value="HSDA Data Manager"/></p> <p>Email <input type="text" value="kanorcott@tarrantcounty.com"/></p> <p>Phone <input type="text" value="817-555-5555"/></p> <p>Fax <input type="text"/></p> <p>EMA Number <input type="text"/></p> <p><input type="checkbox"/> HRSA Grantee</p> <p>Agency Type <input type="text" value="Provider Agency"/></p> <p>Domains <input checked="" type="checkbox"/> CARE <input checked="" type="checkbox"/> Prevention</p>
--	---

Complete the fields as follows. Fields marked with a red asterisk (*) are required.

Agency Full Name	Enter the agency's entire name.
Agency Short Name	Enter an abbreviated version of the agency and name. Example: for the San Francisco AIDS Foundation, you might use "SFAF." This short name will be used in screens and reports where the full agency name might not format correctly.
Website	If the agency has a website, enter it in the text field. Include "http://" at the beginning; e.g., if the website is www.ryanwhitecenter.org, you would enter "http://www.ryanwhitecenter.org" in the text field.
Acuity Tools Link	Acuity tools are used to measure the severity of a disease. As different agencies employ different acuity systems, it is important that the tool each agency uses be available to help standardize case management services. Enter the agency's link including "http://" at the beginning; e.g., if the website is www.ryanwhitecenter.org/acuity, you would enter "http://www.ryanwhitecenter.org/acuity" in the text field.
Taxpayer ID	Enter the nine-digit taxpayer ID. Use the format 99-1234567. For some smaller agencies, you can enter a Social Security number. Use the format 123-45-6789.
Agency Provider ID 1	Enter any identification code provided by the agency's administrative agency.
Agency Provider ID 2	Enter any additional identification code provided by the agency's administrative agency.
Contact Name	Enter the name of the contact person for financial and contract matters. This is often the director or financial officer.
Title	Enter the title of the contact person.

Email	Enter the email address of the contact person.
Phone	Enter the phone number of the contact person. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345
Fax	Enter the fax number of the contact person.
EMA Number	Enter the Eligible Metropolitan Area (EMA) number of the agency.
HRSA Grantee	Check this box if your agency is a Health Resources and Services Administration (HRSA) grantee.
Notes text box	Enter any additional agency information in the Notes text box.
Agency Type	<p>Make a selection from the Agency Type dropdown (e.g., Provider Agency or Administrative Agency).</p> <p>Note: Because AA's and Super AA's may not have contracts, an agency that has any contracts or clients cannot be changed from a Provider Agency to any other type of agency. If a user attempts this, an error message appears: "This agency has contracts or clients. Administrative agencies may not have contracts or clients."</p>
Domains	Select the checkbox for Care, Prevention, or both.
Agency record is active	<p>If this checkbox is visible, check it or leave it unchecked as appropriate.</p> <p>Note on agency inactivation: Users with appropriate permissions can mark an agency as inactive (rather than Deactivated). When an agency is marked inactive, the agency's information and records are available for reporting and for viewing, but no new records can be added to that agency.</p> <p>This feature is intended for the Texas installation, but may be optionally enabled for other installations in the future. A configuration parameter is available in ARIESAdmin to control whether this feature is enabled.</p> <p>This option works as follows:</p> <ul style="list-style-type: none"> • If the option is set to False, the "Agency record is active" checkbox on the Agency Edit screen is hidden and the field is set to true by default. A newly created agency has this value set to True by default. • An Agency Update will update the "Agency record is active" checkbox only if the option is enabled. • The system's validation rules for this field are executed only if the option is set to True. • In all other situations, the "Agency record is active" flag is ignored regardless of its value.

	<p>Click this button to save your updates and proceed to the Agency Site screen.</p>
	<p>Click this button to save your entries and return to the Agency Info screen.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is only available to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the agency.</p> <p>You will be prompted for confirmation: "Are you sure you want to deactivate this record?" Click OK to proceed or Cancel to cancel the deactivation.</p> <p>Once deactivated, the agency will no longer appear on the Agency Edit screen.</p> <p>Clicking Deactivate does not delete the record from the system; it only removes it from the display.</p> <p>To reactivate a record, contact your Agency ARIES Admin.</p>
	<p>Click the Cancel button to return to the Agency Info screen without saving your entries.</p>

4.9.1 Adding or Editing Agency Sites

Agencies can provide services from multiple sites. To add or edit a site, from the ARIES menu bar at the top of the ARIES screen, choose the **Find > Agency** menu item to display the Agency Search screen.

Agency Search

Search for ARIES agencies. You may use the wildcard *.

Agency

Services

Display **results**



- Enter the name of your agency in the "Agency" text field. As a shortcut, you can enter the first few letters of the agency and use the "*" wildcard. Example: If you wanted to find the Ryan White Center, you would enter "ryan*."
- Click the **Search** button.
- If you are taken to the Agency Search Result screen, click the name of your agency to get to Agency Info screen.
- From the Agency Info screen, click the **Edit** button, to proceed to the Agency Edit screen.
- From the Agency Edit screen, click the **Save+Next** button to proceed to the Agency Site screen, which displays all of your agency's sites.

Agency Edit for 0000 - Wellness 4 Life

<p>Agency Full Name <input type="text" value="0000 - Wellness 4 Life"/></p> <p>Agency Short Name <input type="text" value="W4L"/></p> <p>Website <input type="text"/></p> <p>Acuity Tool Link <input type="text"/></p> <p>Taxpayer ID <input type="text" value="12-3456789"/></p> <p>Agency Provider ID 1 <input type="text"/></p> <p>Agency Provider ID 2 <input type="text"/></p> <p>Notes <input type="text"/></p> <p><input checked="" type="checkbox"/> Agency record is active</p>	<p>Contact Name <input type="text" value="Kellie Norcott"/></p> <p>Title <input type="text" value="HSDA Data Manager"/></p> <p>Email <input type="text" value="kanorcott@tarrantcounty.com"/></p> <p>Phone <input type="text" value="817-555-5555"/></p> <p>Fax <input type="text"/></p> <p>EMA Number <input type="text"/></p> <p><input type="checkbox"/> HRSA Grantee</p> <p>Agency Type <input type="text" value="Provider Agency"/></p> <p>Domains <input checked="" type="checkbox"/> CARE <input checked="" type="checkbox"/> Prevention</p>
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To Add a New Site



- On the read-only Agency Site screen, click the **New** button. A new column opens on the right side of the Agency Site screen, displaying empty, editable fields.

Agency Sites for Shasta Test Services

Site Name	Medical Office	Housing and Urban Development	Other Services	Insurance Office	Sonoma Medical Allied Systems Health	Roses Associated Medical	
Site Code					Sonm-12	Sonm-12	<input type="text"/>
Street 1	633 Bear Ave	534 Wolf Street	234 Lion Ct	256 Tiger St.	448 West Napa st.	2300 Chanate Rd	<input type="text"/>
Street 2	Place						<input type="text"/>
City	SQA	SQA	SQA	SQA	Sonoma	Santa Rosa	<input type="text"/>
State & ZIP	TX 82314	TX 58741	TX 32469	TX 54873	CA 95476	CA 95404	<input type="text"/> <input type="text"/>
County	Anderson	Anderson	Anderson	Anderson	Sonoma	Sonoma	<input type="text"/>
Geog Area/HSDA	4802-Arlington	4802-Arlington	4802-Arlington	4802-Arlington			<input type="text"/>
Phone 1	408-231-2789 (Main)	408-231-2752 (Main)	408-231-2717 (Main)	408-231-2726 (Main)	707-933-5060 (Main)	707-562-3111 (Main)	<input type="text"/>
Phone 2	408-231-2769 (TTY)	408-231-2732 (Fax)	408-231-2787 (TTY)	408-231-2736 (Fax)	707-933-5066 (Fax)	707-562-3122	<input type="text"/>

Complete the blank fields as follows. Rows marked with a red asterisk (*) indicate required fields.

Site Name	Enter the site name.
Site Code	Enter the site code.
Street 1	Enter the street address.

Street 2	Optional. Enter an additional street address.
City	Enter the city of the site.
State & ZIP	Use the dropdown to select the state of the site. In the adjacent window, enter the ZIP code of the site.
County	Use the dropdown to enter the county of the site. The list is set to display the counties in the state you selected.
Geog Area/HSDA	Use the dropdown list to enter this site's geographic area or Health Services Delivery Area (HSDA).
Phone 1	<p>Enter the phone number of the site. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345</p> <p>Use the dropdown to identify the phone number as the main number, or fax number, or a telecommunications device for the hearing impaired (TTY).</p>
Phone 2	<p>Optional. Enter a second phone number. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345</p> <p>Use the dropdown to identify the phone number as the main number, or fax number, or a telecommunications device for the hearing impaired (TTY).</p>
	Click this button to save your input and return to the Agency Site screen, which now displays the new site.
	Click the Cancel button to return to the Agency Site screen without saving your input.

To Enter Additional Sites

- Click the **New** button again and repeat the above instructions.




To Edit an Existing Site

- To edit information for an existing site, click the **Edit** button below the site you wish to edit. The existing information for that site is then displayed in editable windows.

Agency Site for Clear View Mission

Site Name *	Main	Street Outreach	<input type="text" value="Bodega Bay"/>	
Site Code	1234		<input type="text" value="777777"/>	
Street 1 *	2000 Market St	129 Harmon Road	<input type="text" value="88 Bodega Bay Road"/>	
Street 2			<input type="text"/>	
City *	San Francisco	Hurst	<input type="text" value="Bodega Bay"/>	
State & ZIP *	CA	TX	<input type="text" value="CA"/> <input type="text" value="94923"/>	
County *	San Francisco	Unknown	<input type="text" value="Contra Costa"/>	
Geog Area/HSDA			<input type="text"/>	
Phone 1 *	415-458-2500	817-569-5761	<input type="text" value="949-123-4567"/>	<input type="text" value="Main"/>
Phone 2 *	415-458-2500	817-569-5798	<input type="text"/>	<input type="text"/>

Complete the fields as follows. Rows marked with a red asterisk (*) indicate required fields.

Site Name	Enter the site name.
Sire Code	Enter the site code.
Street 1	Enter the street address.
Street 2	Optional. Enter an additional street address.
City	Enter the city of the site.
State & ZIP	Use the dropdown to select the state of the site. In the adjacent window, enter the ZIP code of the site.
County	Use the dropdown to enter the county of the site. The list is set to display the counties in the state you selected.
Geog Area/HSDA	Use the dropdown list to enter this site's geographic area or Health Services Delivery Area (HSDA).
Phone 1	Enter the phone number of the site. Use the dropdown to identify the phone number as the main number, or fax number, or a telecommunications device for the hearing impaired (TTY).
Phone 2	Optional. Enter a second phone number. Use the dropdown to identify the phone number as the main number, or fax number, or a telecommunications device for the hearing impaired (TTY).
	Click this button to save your input and return to the Agency Site screen, which now displays the new site.
	Click the Cancel button to return to the Agency Site screen without saving your input.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.

This option is only available to users with the appropriate permission level.

Click the **Deactivate** button to deactivate the site.

You will be prompted for confirmation: "Are you sure you want to deactivate this record?" Click **OK** to proceed or **Cancel** to cancel the deactivation.

Once deactivated, the site will no longer appear on the Agency Site screen.

Clicking **Deactivate** does not delete the record from the system; it only removes it from the display.

To reactivate a record, contact your Agency ARIES Admin.

4.9.2 Adding or Editing a Funding Source

Services are reimbursed based on contracts with funding sources. You can use ARIES to track your funding sources, contracts and services. Before creating new contracts, make sure all funding sources information has been added.

When you are entering or editing contract information, be as accurate and complete as possible, to help facilitate budgeting and tracking.

From the ARIES menu bar at the top of the screen, select **Find > Agency**. The Agency Search screen appears.

Agency Search

Search for ARIES agencies. You may use the wildcard *.

Agency

Services

Display **results**

Search >

- Enter the name of your agency in the Agency text field. As a shortcut, you can enter the first few letters of the agency and use the "*" wildcard. Example: If you wanted to find the Ryan White Center, you would enter "ryan*."
- Click **Search**.
- On the Agency Search Result screen, click the name of your agency to get to the Agency Info Screen.
- On Agency Info, click the Funding & Contracts tab.

AGENCY INFO	FUNDING & CONTRACTS	SERVICES PROVIDED	RSR/RDR	LAB BATCH DATA ENTRY	AGENCY UTILITIES
FUNDING SOURCES & CONTRACTS ARIES					
Cafe Late					
Funding Sources & Contracts Edit					
Contract Name	Funding Source	Contract #	Start Date	End Date	Amount
Copied Contract	Ryan White Title II	1	1/1/2009	12/31/2010	\$1.00
Ryan White 2	Ryan White Title II	777288	4/1/2008	3/31/2009	\$188,000.00
Original Contract	Ryan White Title II	1	1/1/2008	12/31/2009	\$1.00
Ryan White	Ryan White Title II	777777	4/1/2006	3/31/2007	\$188,000.00

Note: Make sure all of your funding sources, including federal, state, county, city and private sources are entered on this screen.

On the Funding & Contracts tab, click the **Edit** button for a read-only display of the agency's funding sources, grantee numbers and any notes.

Funding Sources Edit for Cafe Late

Please enter all the funding sources for this agency.

Funding Source	Grantee Number	Notes
Ryan White Part B	4499-88	

[Edit](#)
[New](#)

[Next](#) [Done](#)

To Add a New Funding Source

- Click the **New** button to display the Funding Sources Edit screen.



Funding Sources Edit for Cafe Late

Please enter all the funding sources for this agency.

Funding Source	Grantee Number	Notes
Ryan White Part B CA State Office of AIDS <input type="text"/> If Other: <input type="text"/>	4499-88	<input type="text"/>

[Save](#)
[Cancel](#)

Complete the fields as follows.

Funding Source	Use the dropdown to select the funding source. If the funding source is not listed, enter it in the Other field.
Grantee Number	Enter the grantee number.
Notes text box	Enter any additional information in the Notes text box. This is a scrollable box.
If Other	If you selected "Other" from the Funding Source dropdown list, you must make an entry in the "If Other" field.
	Click this button to save your input and return to the Funding Sources Edit screen.
	Click the Cancel button to return to the read-only Funding Sources Edit screen without saving your entries.

To Edit an Existing Funding Source




- Click the **Edit** button to the right of the row you wish to edit. The Funding Sources Edit screen for that row displays.

Funding Sources Edit for Cafe Late



Please enter all the funding sources for this agency.

Funding Source	Grantee Number	Notes
Ryan White Part B	4499-88	
Ryan White Part A <input type="text"/>	4499-88 <input type="text"/>	<input style="width: 100%;" type="text"/>
If Other: <input type="text"/>		

Complete the edits as follows.

Funding Source	Use the dropdown to select the funding source. If the funding source is not listed, enter it the If Other field.
Grantee Number	Enter the grantee number.
Notes text box	Enter any additional information in the Notes text box. This is a scrollable box.
If Other	If you selected "Other" from the Funding Source dropdown list, you must make an entry in the "If Other" field.
	Click this button to save your input and return to the Funding Sources Edit screen.
	Click the Cancel button to return to the read-only Funding Sources Edit screen without saving your input.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is only available to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the funding source. You will be prompted for confirmation: "Are you sure you want to deactivate this record?" Click OK to proceed or Cancel to cancel the deactivation.</p> <p>Once deactivated, the funding source will no longer appear on the Funding Sources screen.</p> <p>Clicking the Deactivate button does not delete the record from the system; it only removes it from the display.</p> <p>To reactivate a record, contact your Agency ARIES Admin.</p>

Back on the read-only Funding Sources Edit screen:

	Click this button to return to the Funding & Contracts tab.
	Click this button to move on to the Contracts Edit screen.

4.9.3 Adding or Editing Contracts

Services are reimbursed based on contracts with funding sources. You can use ARIES to track your funding sources, contracts, and services. Before creating new contracts, make sure all [funding sources](#) information has been added. Check for accuracy and completeness when you are entering or editing contract information. Accurate and complete information will help facilitate budgeting and tracking.

To navigate to the Contracts edit screen, open the Agency Info tab for your agency.

The screenshot shows the 'AGENCY INFO' tab selected. The main content area displays 'Clear View Mission' with an 'Edit' button. Below this, 'Contact Information' is shown for two locations: 'Main' and 'Castro'. The 'Main' location is at 2000 Market St, Los Angeles, CA 94110. The 'Castro' location is at 300 Castro St, San Francisco, CA 94114. Contact information includes 'Contact: SysAdmin' with email 'sysadmin@partner.gov' and a 'Find Staff' link. Notes mention 'Case Management Dept. 555-555-2899 ext. 230'.

From the Agency Info screen, click the Funding & Contracts tab, which displays the Funding Sources & Contracts screen.

- On the Funding & Contracts screen, click **Edit** to go to the Funding Sources Edit screen.
- On the Funding Sources Edit screen, click **Next** to go to the Contracts Edit screen.

Contracts Edit for Shasta Test Services

Please enter all the contracts for this agency.
For each contract, you will be asked to define the services provided under the contract.

Contract Name	Funding Source	Contract #	Start Date	End Date	Amount	Expended			
OutreachServices	Ryan White Part A	111111	1/1/2015	12/31/2015	\$100,000.00	\$0.00	Edit	Edit Services	Copy
OutreachServices2	CA State Office of AIDS	5555	1/1/2015	12/31/2015	\$5,000,000.00	\$0.00	Edit	Edit Services	Copy
MP14-15	CA State Office of AIDS	MP14-15	7/1/2014	8/30/2016	\$240,900.00	\$0.00	Edit	Edit Services	Copy
RA14-15	Ryan White Part A	RA14-15	7/1/2014	8/30/2016	\$320,500.00	\$0.00	Edit	Edit Services	Copy
CH14-15	CDC	CH14-15	7/1/2014	8/30/2016	\$320,100.00	\$0.00	Edit	Edit Services	Copy
HP14-15	HOPWA	HP14-15	7/1/2014	8/30/2016	\$689,010.00	\$0.00	Edit	Edit Services	Copy
MA14-15	CA State Office of AIDS	MA14-15	7/1/2014	8/30/2016	\$25,100.00	\$0.00	Edit	Edit Services	Copy
MAIR14-15	CA State Office of AIDS	MAIR14-15	7/1/2014	8/30/2016	\$215,000.00	\$0.00	Edit	Edit Services	Copy

To Add a New Contract

To add a new contract, click the **New** button to display the Contracts Edit screen.

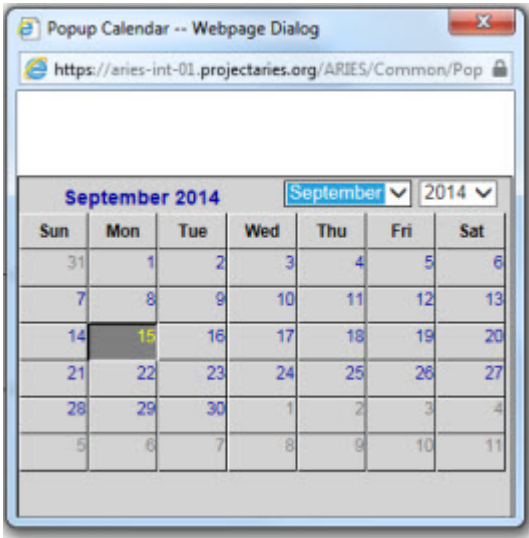
Note: The **New** button is not visible to users in Admin Agencies or Super AA's. However, the button remains visible to Admin or Super AA users if they are emulating an agency user.


When you click **New**, a new Edit screen will appear.



Contract Edit for ARIES Partner

<p>Contract Name <input type="text"/></p> <p>Contract Number <input type="text"/></p> <p>Service Hierarchy Version <input type="text" value="RSR 2015-2016 plus MCWP 2017"/></p> <p>Administrative Agency <input type="text" value="ARIES Partner"/></p> <p>Funding Source <input type="text" value="CA State Office of AIDS"/></p> <p>Start Date <input type="text" value=""/></p> <p>End Date <input type="text" value=""/></p> <p>Display Order <input type="text" value=""/></p>	<p>Amount <input type="text"/></p> <p>Expended <input type="text"/></p> <p>UDC Goal <input type="text"/></p> <p>UOS Goal <input type="text"/></p> <p><input type="checkbox"/> Is Ryan White Funded</p> <p><input checked="" type="checkbox"/> Is Ryan White Eligible</p> <p><input type="checkbox"/> Exclude for New Services</p> <p><input type="checkbox"/> Is ACE/MAI Contract</p>
--	---

Complete the fields as follows.

Contract Name	Enter the contract name.
Contract Number	Enter the contract number.
Service Hierarchy Version	This is the particular service hierarchy that is associated with a particular contract. Properly permissioned users may change the hierarchy associated with a contract.
Administrative Agency	Use the dropdown to select the Administrative Agency, if applicable.
Funding Source	Use the dropdown to select the funding source. If the funding source is not listed, you can add it in the Funding Sources Edit screen.
Start Date	<p>Enter the start date. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>



End Date	<p>Enter the end date. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
Display Order	Assign a numeric Display Order, so that the contract dropdown list on the Service Edit page can be sorted by Display Order as an alternative to alphabetical sorting.
Amount	Enter the dollar amount of the contract.
Expended	This is the amount of the contract that has been expended to date.
UDC Goal	<p>The Unduplicated Clients Goal. This refers to the number of discrete clients expected to receive this service during the contract year.</p> <p>Using the previous bus token example, if each client were eligible for 10 bus tokens, the UDC Goal would be 1,000.</p>
UOS Goal	<p>The Units of Service Goal. This refers to the total number of units planned for this service under this contract.</p> <p>Example: If bus tokens were the service provided, the UOS Goal might be 10,000 bus tokens during the contract year.</p> <p>The default unit of service (UOS) for most service categories is "15 minutes." However, some service categories have different units of measurement such as "test" or "visit." Because the "Other Services" categories are a mixture of diverse services, the units of measurement are varied.</p>
Is Ryan White Funded	Check this box if the contract contains any funding from the Ryan White HIV/AIDS Program, regardless of other sources.
Is Ryan White Eligible	This identifies contracts whose services should be included in the RSR.
Exclude for New Services	Checking this box prevents the contract from displaying on the Services Provided page Contract dropdown list. Existing services are still editable.
Is ACE/MAI Contract	Check this box if the contract covers ACE/MAI services.
	If appropriate, you can click the Copy button to copy details of an old contract into the new contract. This provides an efficient means of "rolling over" a contract from one year to the next, minimizing the time requiring to set up a contract, check off services covered by the contract, adding any Agency Subservices and setting up the default cost and UOS for each Subservice. After copying, you can edit the details of the new contract as needed.




	<p>Important Notes:</p> <ul style="list-style-type: none"> • When you click Copy, you are copying not just the details visible on this particular screen (e.g., name, term, funding source) but ALL of the contract Subservice setup. • When a contract is copied, the Subservices are validated against the current Service Hierarchy file. Any Subservices that don't match the current hierarchy are not copied.
	Click this button to save your entries and return to the Contracts Edit screen.
	Click the Cancel button to return to the Contracts Edit screen without saving your input.

To Edit an Existing Contract

Click **Edit** next to the row you wish to edit. The Contracts Edit screen will appear.

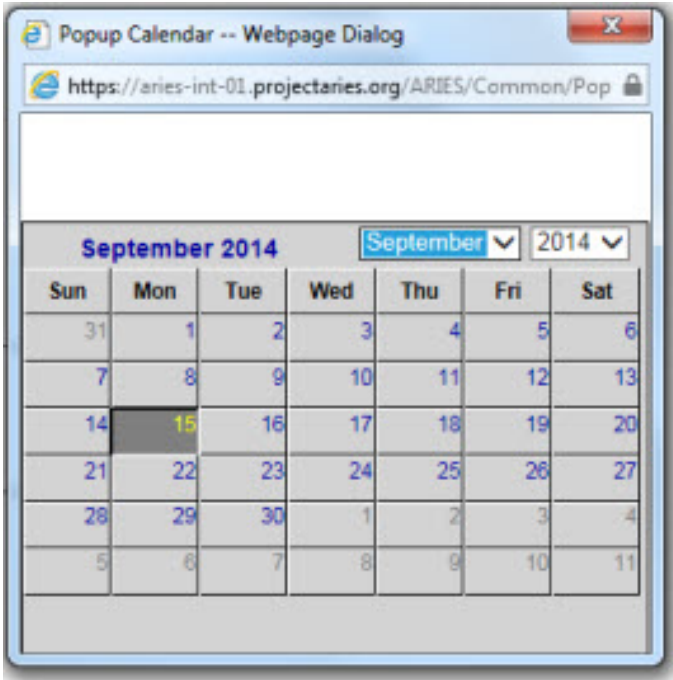
Contract Edit for Shasta Test Services

<p>Contract Name <input style="width: 90%;" type="text" value="RA08-09"/></p> <p>Contract Number <input style="width: 90%;" type="text" value="RA08-09"/></p> <p>Administrative Agency <input style="width: 90%;" type="text" value="Shasta Administrative Services"/></p> <p>Funding Source <input style="width: 90%;" type="text" value="Ryan White Part A"/></p> <p>Start Date <input style="width: 40%;" type="text" value="7/1/2005"/> </p> <p>End Date <input style="width: 40%;" type="text" value="8/30/2010"/> </p> <p>Display Order <input style="width: 40%;" type="text" value="14"/></p>	<p>Amount <input style="width: 90%;" type="text" value="320,500.00"/></p> <p>Expended 0.00</p> <p>UDC Goal <input style="width: 90%;" type="text" value="1200"/></p> <p>UOS Goal <input style="width: 90%;" type="text" value="99900"/></p> <p>* <input checked="" type="checkbox"/> Is Ryan White Funded</p> <p><input checked="" type="checkbox"/> Is Ryan White Eligible</p> <p><input type="checkbox"/> Exclude for New Services</p> <p><input type="checkbox"/> Is ACE/MAI Contract</p>
--	--




Complete the fields as follows.

Contract Name	Enter the contract name.
Contract #	Enter the contract number.
Administrative Agency	Use the dropdown to select the Administrative Agency, if applicable.
Funding Source	Use the dropdown to select the funding source. If the funding source is not listed, you can add it in the Funding Sources Edit screen.
Start Date	Enter the start date. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.



For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.

<p>End Date</p>	<p>Enter the end date. Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>Display Order</p>	<p>Assign a numeric Display Order, so that the contract dropdown list on the Service Edit page can be sorted by Display Order as an alternative to alphabetical sorting.</p>
<p>Amount</p>	<p>Enter the dollar amount of the contract.</p>
<p>Expended</p>	<p>This is the amount of the contract that has been expended to date.</p>
<p>UDC Goal</p>	<p>The Unduplicated Clients Goal. This refers to the number of discrete clients expected to receive this service during the contract year.</p> <p>Using the previous bus token example, if each client were eligible for 10 bus tokens, the UDC Goal would be 1,000.</p>
<p>UOS Goal</p>	<p>The Units of Service Goal. This refers to the total number of units planned for this service under this contract.</p> <p>Example: If bus tokens were the service provided, the UOS Goal might be 10,000 bus tokens during the contract year.</p> <p>The default unit of service (UOS) for most service categories is "15 minutes." However, some service categories have different units of</p>

	measurement such as "test" or "visit." Because the "Other Services" categories are a mixture of diverse services, the units of measurement are varied.
Is Ryan White Funded	Check this box if the contract contains any funding from the Ryan White HIV/AIDS Program, regardless of other sources.
Is Ryan White Eligible	This identifies contracts whose services should be included in the RSR.
Exclude for New Services	Checking this box prevents the contract from displaying on the Services Provided page Contract dropdown list. Existing services are still editable.
Is ACE/MAI Contract	Check this box if the contract covers ACE/MAI services.
	Click this button to save your entries and return to the Contracts Edit screen.
	Click the Cancel button to return to the Contracts Edit screen without saving your input.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is only available to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the contract. You will be prompted for confirmation: "Are you sure you want to deactivate this record?" Click OK to proceed or Cancel to cancel the deactivation.</p> <p>Once deactivated, the contract will no longer appear on the Contracts screen.</p> <p>Clicking Deactivate does not delete the record from the system; it only removes it from the display.</p> <p>To reactivate a record, contact your Agency ARIES Admin.</p>

When you are finished entering contracts for your agency:

- Click **Done** to return to the Funding & Contracts tab if you wish to add or edit services at a later date.

OR

- Click the **Edit Services** button to go to the Primary Services screen to add or edit services.

4.9.4 Adding or Editing Primary Services

If you are adding services at a later time than when you created the new agency, access the Primary Services screen as follows:

- From the ARIES menu bar at the top of the ARIES screen, choose the **Find > Agency** menu item, to display the Search screen.
- Search for the agency you wish to add services for, which will take you to the Agency Info tab.
- From the Agency Info tab, select the Funding & Contracts tab.
- On the Funding & Contracts tab, click **Edit** to go to the Funding Sources Edit screen.
- On the Funding Sources Edit screen, click **Next** to go to the Contracts Edit screen.
- On the Contracts Edit screen, click the **Edit Services** button to add new services.

Primary Services Edit for The September Agency
for RWS

Please check each category of service your agency provides for the contract.
In the next screen you will be able to add custom categories.

<p>RYAN WHITE</p> <p>Outpatient/Ambulatory Medical Care</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> CD-4 T-Cell Count <input type="checkbox"/> Dermatology <input checked="" type="checkbox"/> Infectious Diseases <input checked="" type="checkbox"/> Laboratory Service <input type="checkbox"/> Neurology <input checked="" type="checkbox"/> Ob/Gyn <input type="checkbox"/> Oncology <input type="checkbox"/> Ophthalmology <input type="checkbox"/> Other Specialty <input type="checkbox"/> Outpatient/Ambulatory Medical Care <input type="checkbox"/> Radiology 	<p>CARE-HIPP</p> <p>Outpatient/Ambulatory Medical Care</p> <ul style="list-style-type: none"> <input type="checkbox"/> CD-4 T-Cell Count <input type="checkbox"/> Dermatology <input type="checkbox"/> Infectious Diseases <input type="checkbox"/> Laboratory Service <input type="checkbox"/> Neurology <input type="checkbox"/> Ob/Gyn <input type="checkbox"/> Oncology <input type="checkbox"/> Ophthalmology <input type="checkbox"/> Other Specialty <input type="checkbox"/> Outpatient/Ambulatory Medical Care <input type="checkbox"/> Radiology
---	--



<p>Substance Abuse Services</p> <ul style="list-style-type: none"> <input type="checkbox"/> Detox <input type="checkbox"/> Residential Treatment <input type="checkbox"/> Substance Abuse Services - Residential <p>Treatment Adherence Counseling (non-medical)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Treatment Adherence Counseling (non-medical) 	<p>STATE OF</p> <p>Buddy/Companion Services</p> <ul style="list-style-type: none"> <input type="checkbox"/> Buddy/Companion Services <p>Child Welfare Services</p> <ul style="list-style-type: none"> <input type="checkbox"/> Child Welfare Services <p>Client Advocacy</p> <ul style="list-style-type: none"> <input type="checkbox"/> Client Advocacy <p>Referrals to Clinical Research</p> <ul style="list-style-type: none"> <input type="checkbox"/> Referrals to Clinical Research <p>Respite Care</p> <ul style="list-style-type: none"> <input type="checkbox"/> Affected Child (Less Than 13) <p>Transportation</p> <ul style="list-style-type: none"> <input type="checkbox"/> Medical <input type="checkbox"/> Non-Medical <p>Other Services</p> <ul style="list-style-type: none"> <input type="checkbox"/> Other Services <input type="checkbox"/> Emergency-House Items <input type="checkbox"/> Employment Assistance <input type="checkbox"/> Volunteer Services Direct Service <input type="checkbox"/> Volunteer Services Support
---	---

Save + Next >
Cancel

Check all the services associated with the contract.

- To add a service, click on the box.
- To delete a service, click on the checkbox to delete the checkmark.

After checking all the services, click on one of the following:

	Click this button to save your input and proceed to the Agency Subservices Edit screen, which displays the default subservices for each primary service checked.
	Click the Cancel button to return to the read-only Contracts Edit screen without saving your input.

4.9.5 Adding or Editing Subservices

Notes

On the Agency Subservices Edit page, you will receive warning messages if the following conditions exist:

- The sum of the Budget columns for the contract exceeds "Amount" on the contract record. The warning message is: "Sum of budgets for Subservices (\$nn,nnn) should not exceed Contract amount (\$nn,nnn)."
- The sum of the "UOS Goal" columns for the contract exceeds "UOS Goal" on the contract record. The warning message is: "Sum of UOS Goal for Subservices (nn,nnn) should not exceed Contract UOS Goal (nn,nnn)."

These messages are informational only; they would not prevent the user from saving the record.



To Add a New Subservice

- Click **Add** in the row where you wish to add a subservice. The Agency Subservice Edit screen displays for that row.

Agency Subservices Edit for 0000 - Wellness 4 Life
for 06-07 RW 1



You may divide the services checked in the previous page into finer categories, specific to your agency.

Service	Unit	Default Quantity	Default Price	UOS Goal	UDC Goal	Budget	Notes
Ryan White -> Outreach Services -> Outreach Services							
Outreach Services - MAI - African American	Contact	1.00	\$476.22	110	12	\$52,384.00	
<input type="text" value="Outreach Services"/>	<input type="text" value="Contact"/>	<input type="text" value="1.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>
Ryan White -> Psychosocial Support Services -> Other Counseling Individual							
Other Counseling Individual	15 Minutes	1.00	\$40.23	109	14	\$4,379.00	

Complete the fields as follows.

Service text box	Enter the type of subservice. This is a scrollable field.
Unit	Use the dropdown to select the quantifiable unit of service. Example: If the service were nutritional education, the units might be hours; if it were food service being provided, the units might be meals.
Default Quantity	The standard number of units provided for a client. Example: If a standard nutrition information session took two hours to give, the default quantity would be "2."

	Note: When entering a service line item in an Edit Service screen the staff person enters the actual number of units supplied.
Default Price	The cost per unit of service. Example: Meals might cost \$5.00 per unit. Enter the dollar amount without the \$ or commas. They will automatically be supplied once you tab out of the field.
UOS Goal	<p>The Units of Service Goal. This refers to the total number of units planned for this service under this contract.</p> <p>Example: If bus tokens were the service provided, the UOS Goal might be 10,000 bus tokens during the contract year.</p> <p>The default unit of service (UOS) for most service categories is "15 minutes." However, some service categories have different units of measurement such as "test" or "visit." Because the "Other Services" categories are a mixture of diverse services, the units of measurement are varied.</p>
UDC Goal	<p>The Unduplicated Clients Goal. This refers to the number of discrete clients expected to receive this service during the contract year.</p> <p>Using the previous bus token example, if each client were eligible for 10 bus tokens, the UDC Goal would be 1,000.</p>
Budget	The funds available in the contract for this subservice. Enter the dollar amount without the \$ or commas. They will automatically be supplied once you tab out of the field.
Notes	Any additional information regarding the service. This is a scrollable field.
	Click this button to save your input and return to the Agency Subservices Edit screen, which now displays your input.
	Click the Cancel button to return to the Agency Subservices Edit screen without saving your input.

To Edit an Existing Subservice

- Click **Edit** in the row where you wish to edit a subservice. The Agency Subservice Edit screen displays for that row.




Agency Subservices Edit for December Care
for Service Contract 2011

You may divide the services checked in the previous page into finer categories, specific to your agency.

Service	Unit	Default Quantity	Default Price	UOS Goal	UDC Goal	Budget	Notes
Ryan White -> Oral Health Care -> Oral Health Care Oral Health Care	15 Minutes	1.00	0.00	0	0	0.00	
Ryan White -> Outpatient/Ambulatory Medical Care -> CD-4 T-Cell Count CD-4 T-Cell Count	Test	1.00	\$0.00	0	0	\$0.00	
Ryan White -> Outpatient/Ambulatory Medical Care -> Dermatology Dermatology	15 Minutes	1.00	\$0.00	0	0	\$0.00	
Ryan White -> Outpatient/Ambulatory Medical Care -> Oncology Oncology	15 Minutes	1.00	\$0.00	0	0	\$0.00	
Ryan White -> Outpatient/Ambulatory Medical Care -> Outpatient/Ambulatory Medical Care Outpatient/Ambulatory Medical Care	15 Minutes	1.00	\$0.00	0	0	\$0.00	
Ryan White -> Outpatient/Ambulatory Medical Care -> Partner Notification (PCRS) Partner Notification (PCRS)	15 Minutes	1.00	\$0.00	0	0	\$0.00	

Complete the fields as follows.

Service text box	Enter the type of subservice. This is a scrollable field.
Unit	Use the dropdown to select the quantifiable unit of service. Example: If the service were nutritional education, the units might be hours; if it were food service being provided, the units might be meals.
Default Quantity	The standard number of units provided for a client. Example: If a standard nutrition information session took two hours to give, the default quantity would be "2." Note: When entering a service line item in an Edit Service screen the staff person enters the actual number of units supplied.
Default Price	The cost per unit of service. Example: Meals might cost \$5.00 per unit. Enter the dollar amount without the \$ or commas. They will automatically be supplied once you tab out of the field.
UOS Goal	The Units of Service Goal. This refers to the total number of units planned for this service under this contract. Example: If bus tokens were the service provided, the UOS Goal might be 10,000 bus tokens during the contract year.
UDC Goal	The Unduplicated Clients Goal. This refers to the number of discrete clients expected to receive this service during the contract year. Using the previous bus token example, if each client were eligible for 10 bus tokens, the UDC Goal would be 1,000.
Budget	The funds available in the contract for this subservice. Enter the dollar amount without the \$ or commas. They will automatically be supplied once you tab out of the field.
Notes	Any additional information regarding the service. This is a scrollable field.

	<p>Click this button to save your input and return to the Agency Subservices Edit screen, which now displays your input.</p>
	<p>Click the Cancel button to return to the Agency Subservices Edit screen without saving your input.</p>
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is only available to users with the appropriate permission level.</p> <p>Click the Deactivate button to deactivate the subservice.</p> <p>You will be prompted for confirmation: "Are you sure you want to deactivate this record?" Click OK to proceed or Cancel to cancel the deactivation.</p> <p>Once deactivated, the subservice will no longer appear on the Agency Edit screen.</p> <p>Clicking Deactivate does not delete the record from the system; it only removes it from the display.</p> <p>To reactivate a record, contact your Agency ARIES Admin.</p>

From the Agency Subservices Edit screen:

- Click **Done** to return to the [Contracts Edit](#) screen.
- Then click **Done** to go to the [Funding & Contracts](#) tab.

Section 5

5 Reports

Reports are used for summarizing services, managing clients, planning work in your agency, and financial analysis. Data collectors and researchers also use reports for demographics analyses. ARIES provides a selection of commonly used reports.

Users can generate reports on your agency's records, e.g., reports on clients' needs assessments or mailing labels for your clients. Advanced users with access to the ARIES Report Export application can create customized ad hoc reports.

Major report categories include:

- [Client Reports](#)
- [Services Reports](#)
- [Finance Reports](#)
- [Management Reports](#)
- [Cross Tab Reports](#)
- [Compliance Reports](#)
- IAS Letters

5.1 Generating Reports in ARIES

Users with the proper permissions can run reports in a few quick steps. Reports can be printed directly from the ARIES screens, or you can export your report for better control over layout and formatting. Data can be exported as comma-separated values, tab-separated values, or an XML file, which can then be imported into other applications (e.g., a spreadsheet or word-processing program) for post-processing.

If you will be importing your ARIES data into Microsoft Excel or Microsoft Access, use the "Text, comma-separated" export format. This produces a CSV file that can be opened directly in Excel or imported easily into Access. If you are importing your ARIES data into an analytical tool that uses XML as its native format, use the "XML" export format. The "Text, tab-separated" export format is provided for compatibility with older analytical tools.

To access ARIES reports:

From the [ARIES menu bar](#):

- Select Reports to display a dropdown menu listing the report categories.



The Report category screens include:

- [Client Reports](#)

- [Services Reports](#)
- [Finance Reports](#)
- [Management Reports](#)
- [Cross Tab Wizard](#)
- [Compliance Reports](#)
- Select the report screen you want to access, which takes you to a list of available reports. This example uses Client Reports as the selection.

Client Reports

Pending Eligibility Documents	Displays client, staff, document, intake date, and client contact information for each eligibility document whose status is pending. Filter by intake date.
Client Status	Displays client name, current status, previous status, date of last change, reason, and staff person for clients with selected status values over a range of dates.
Active Client Roster by Staff	Display staff person, client, and phone number for active clients. Filter by staff person.

- Select a report name to access that report's [Filter Values](#) screen, where you can narrow the scope of your report.

5.1.1 Filter Values

The Filter Values screen displays all the filter criteria for a given report. For example, you may want to search the incomplete tasks of a specific staff person or you might want immunization information only for a given month.

Report Filter Values

Care Plan Incomplete Tasks

Follow-up Date	After	▼	7/1/2010	📅	&		📅
Staff Last Name		▼			&		
Display	1000		results	<input type="checkbox"/> Display print format			
Report >				Export			

ARIES uses a series of dropdown lists and text fields to define the parameters of your report. Each report has a separate set of filters that pertain to the information you are

reporting on. Select from the following Report screens for a list of available reports and their associated filter values.

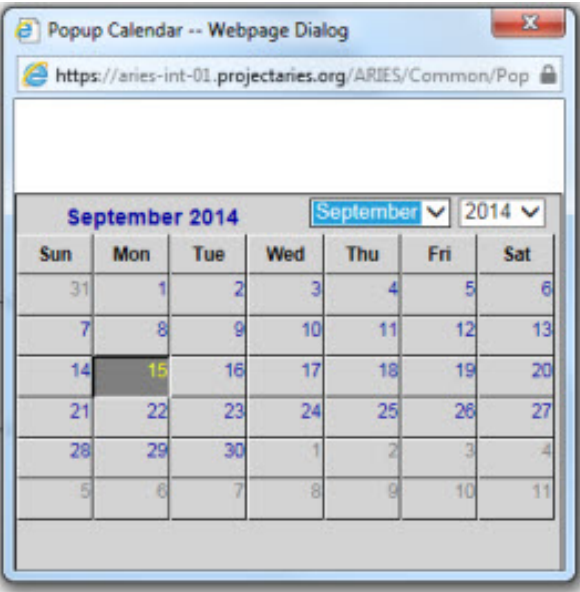
- [Client Reports](#)
- [Services Reports](#)
- [Finance Reports](#)
- [Management Reports](#)
- [Cross Tab Wizard](#)
- [Compliance Reports](#)

See also:

- Information about filters for [dates and numbers](#)
- Information about filters for character [strings](#)
- Information about filtering with [dropdown lists and display numbers](#)

5.1.1.1 Dates and Numbers

Filters for fields that are dates or numbers allow you to match a specific value of a range of values.

<p>Matching a Specific Value of a Range of Values</p>	<p>For a follow-up date, you can filter <i>on</i>, <i>between</i>, <i>before</i> or <i>after</i> dates by selecting one of these filters from the dropdown list.</p>
<p>Entering Dates</p>	<p>Enter the date you wish to filter by in the first text field using the format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> 

	For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.
To filter for records <u>on</u> a given date	Select " On " from the dropdown list and enter a specific date to filter for records for a given day. Example: Enter the date 6/23/2010 in the first text field. Leave the second text field empty. Click Search to display the records for June 23, 2010.
To filter for records <u>before</u> a given date	Select " Before " from the dropdown list to sort through all entries before - but not including - a specific date. Example: Enter the date 6/23/2010 in the first text field. Leave the second text field empty. Click Search to display records dated before midnight on June 22, 2010.
To filter for records <u>after</u> a given date	Select " After " from the dropdown list to sort through all entries after a specific date, including records dated the day. Example: Enter 6/23/2010 in the first text field. Leave the second text field empty. Click Search to display all the records dated June 23, 2010 and all the days following it.
To filter for a range of dates	Select " Between " from the dropdown list to sort through all entries between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all records from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field. Click Search to display all records on June 23, 2010 through June 27, 2010.
To filter through all records with no date	Select " Is Null " from the dropdown list to sort through all records that have no date entered. This can be helpful in searching for incomplete or missing information.
To filter through all records with a date	Select " Is Not Null " from the dropdown list to sort through all records that have any date.

5.1.1.2 Strings

For alphabetical entries such as names, ARIES provides a range of filters you can use to control reporting.

To filter by strings that match the name exactly	For alphabetical entries like names, use the Equals filter on Filter Values to report on records that match that name exactly. Example: Selecting Equals and entering "Smith" in the first text field reports on all the entries with the name of Smith.
---	---

<p>To filter by alphabetical range of entries</p>	<p>Select Before from the dropdown list to filter on an alphabetical range of entries before a specific letter. Example: To report on records from A through L, enter "m" in the first text box.</p> <p>Select After from the dropdown list to filter on an alphabetical range of entries after a specific letter. Example: To report on records from M through Z, enter "m" in the first text box.</p> <p>Select Between from the dropdown list to filter on an alphabetical range of entries between specific letters. Example: To search records from D through K, enter "D" and "L" in the two text fields. ARIES searches all entries from D up to, but not including, L.</p>
<p>To filter through all records with no date</p>	<p>Select "Is Null" from the dropdown lists to sort through all records that have no date entered. This can be helpful in searching for incomplete or missing information.</p>
<p>To filter through all records with a date</p>	<p>Select "Is Not Null" from the dropdown lists to sort through all records that have any date.</p>

5.1.1.3 Dropdown and List Box Entries

You can filter report results with selections from dropdowns and list boxes. You can set the number of records to display via the Display window on the Filter Values screen.

Report Filter Values

Needs Assessment

Assessment Date After 6/1/2010 &




Geographic Area/HSDA All
4801-Lubbock
4802-Arlington
4803-Arlington
4804-Tyler
4805-Tyler

Category Ryan White/Home Health Care
Ryan White/Home and Community-Based Health Services
Ryan White/Hospice Services
Ryan White/Mental Health Services
Ryan White/Medical Nutrition Therapy
Ryan White/Medical Case Management (including Treatment Adherence)

Display 1000 **results** Display print format

Report >
Export

<p>To filter through entries using dropdowns</p>	<p>To filter through entries that use dropdowns and list boxes (e.g., gender, ethnicity), select the entry you wish to filter through.</p>
---	--

and list boxes	
To filter through multiple entries	To filter through multiple entries, hold down the Control key (Ctrl) and click the entries you wish to select from the dropdown list. Example: If you want to include clients who were born genetically male, under Client.gender, hold down the Control key and click "Male" and "Transgender MTF."
Display field	Shows the default maximum number of results that will be included in your result.  <p>Increasing this number will display more results, but will take longer to generate. You can change this value to customize your report length.</p>
Display print format checkbox	Select this checkbox to display your report without the ARIES menu bar at the top of the screen or other navigation buttons. This produces a cleaner report for printing.
	Click the Report > button to view the report results.
	Click the Export button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

5.1.2 Report Results

ARIES publishes your report results based on the filters you set in the Filter Values screen.

- Click the **Report** button on the Filter Values screen to display the Report Results.

Pending Eligibility Documents				
Client Name	Staff	Document	Intake	Client Contact Info
Lily Allen	San Antonio User1	Proof of Income	07/27/2010	Do not contact
Nana Bara	austintrain austintrain	Picture ID	07/21/2010	Do not contact
Adrian Braithwaite	Girl Paso	Proof of Income	03/25/2010	Do not contact
Bugs Bunny	James Williams	Proof of Income	10/04/2010	Do not contact
Mariah Carey	San Antonio User1	Proof of Income	07/27/2010	Do not contact
Malory Carter	San Antonio User1	HIV Letter of Diagnosis	11/03/2010	Do not contact
Sarah Clarkson	San Antonio User1	Proof of Income	07/27/2010	Do not contact
Danni Cyrus	San Antonio User1	Proof of Income	07/27/2010	Do not contact
Anthony Della-Moretta	Beth Newton	HIPAA	04/06/2009	Do not contact
Rhonda Duff	San Antonio User1	Proof of Income	07/27/2010	Do not contact

Column names are listed in the first row with the values published underneath. If no columns display, ARIES found no records that matched your criteria.

- To re-enter your filter criteria, click the **Back** link on the ARIES menu bar to return to the Filter Values screen. Use the ARIES **Back** button instead of your browser's back button, as your browser's back button is not supported in ARIES applications.







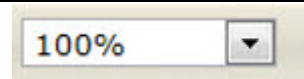
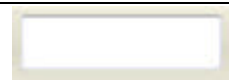
John Smith	Girl Paso	Proof of Income	03/27/2009	Do not contact
Darth Vader	Levi Blackmo	HIV Letter of Diagnosis	07/21/2009	806-555-1257 Messages OK.
Dail Wilson	Girl Paso	Proof of Income	01/13/2010	512-533-5977 Be confidential. No messages.
Jonathan Winters	Eileen Killoren	Proof of Residency	02/04/2009	Do not contact
Lisa Ysatis	Cindy Garza	HIV Letter of Diagnosis	11/03/2009	Do not contact
38 records, generated 11/3/2010 12:46:18 PM Criteria: Agency Specifics Enrollment Date > '1/1/2009' AND Eligibility Document Is Pending = 1				
<input type="button" value="Export"/>				





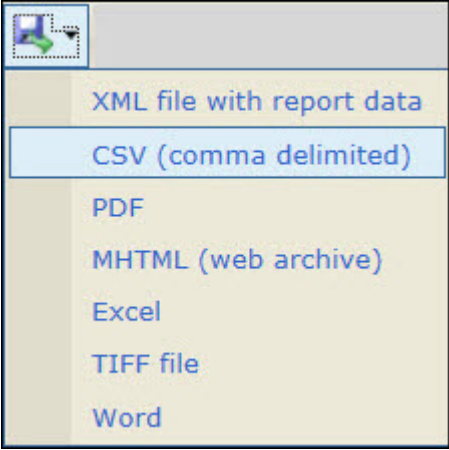


The area below the report results table displays the number of records found, the date and time the report was generated, and the filter criteria you specified.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen, where you must re-enter search filter values before exporting data. Use the **Export** button on the Filter Values page, not on the Results page, to [export your data](#).

5.1.2.1 Results Ribbon

Several report result screens display a ribbon with the following icons (from left to right):

	Use this icon to go to the first page of a report.
	Use this icon to go back one page of a report.
	Use this window to enter the number of the page of a report you wish to display.
	Use this icon to advance one page in a report.
	Use this icon to go to the last page of a report.
	Use this icon to go to the parent report when you are viewing a follow-up report. In a follow-up report, this arrow turns from gray to blue, indicating that it is activated. The application's Back button will cancel the report and return you to the Agency Reports menu.
	Use the dropdown to select the percentage of screen magnification. Default is 100%.
	Use this window to input your search criteria (e.g., specific month or results category).

	Click Find to begin your search.
	Click Next to go to the next search result.
	<p>Click this icon to export the report.</p> <p>Note: If you will be importing your ARIES data into Microsoft Excel or Microsoft Access, use the "Text, comma-separated" export format. This produces a CSV file that can be opened directly in Excel or imported easily into Access. If you are importing your ARIES data into an analytical tool that uses XML as its native format, use the "XML" export format. The "Text, tab-separated" export format is provided for compatibility with older analytical tools.</p> <p>ARIES generates a file based on your format choice and creates a link so that you can download it to your computer.</p> <p>Right click on the link and select Save, Save As, Save Target As, or Save and Open to save the file to your computer.</p>
	<p>Click this icon to display format options in a dropdown.</p> 
	Click this icon to refresh the screen.
	Click this icon to print the report. Follow the printing instructions in your browser.

5.1.3 Exporting Reports

For more control over the formatting of your reports, you can export your report results to use in other applications for post-processing. For example, you may want to format names and addresses to fit on adhesive mailing labels. In that case, you would export your mailing labels to Microsoft Word.

- To export data, click the **Export** button the Filter Values screen.

- Note that clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen, where you must re-enter search filter values before exporting data. Use the **Export** button on the Filter Values page, not on the Results page, to export your data.

Display Number

If you click **Report** on the Filter Values screen to view results before exporting, you can then click the **Back** button on the ARIES menu bar and return to the report's Filter Values screen. On Filter Values, you can increase the Display number to include records that might not have been included in your original report.

If your original report produced the maximum number of records in the Display field, you may want to increase the value to include all records in your export file. You can enter any value up to 100,000.

To Export a Single File

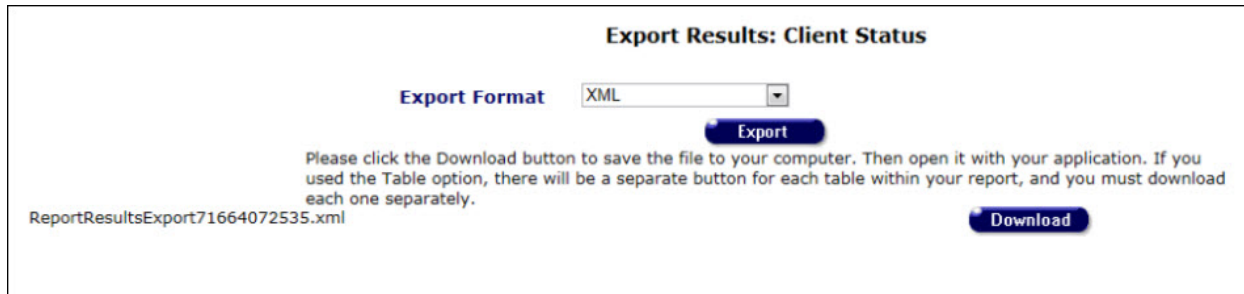
- On the Filter Values screen, click the **Export** button, which takes you to the Export Format screen.

- From the Export Format dropdown list, select the file format of your export file and click **Export**.

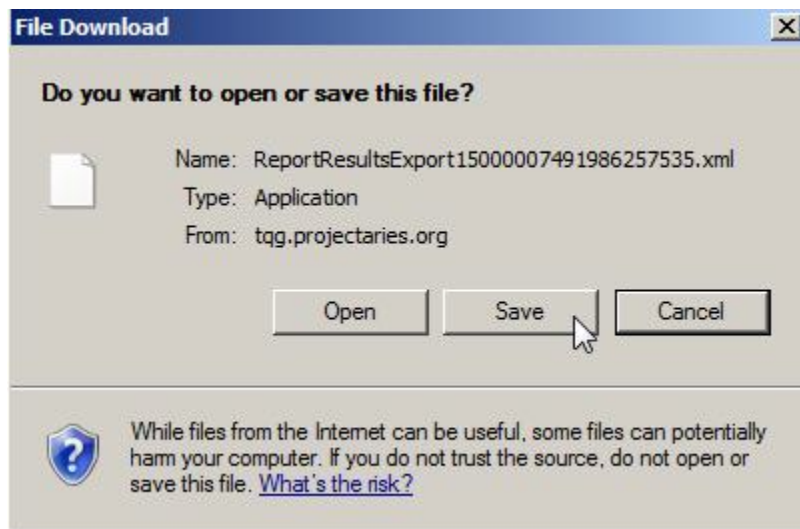
Note: If you will be importing your ARIES data into Microsoft Excel or Microsoft Access, use the "Text, comma-separated" export format. This produces a CSV file that can be opened directly in Excel or imported easily into Access. If you are importing your ARIES data into an analytical tool that uses XML as its native

format, use the "XML" export format. The "Text, tab-separated" export format is provided for compatibility with older analytical tools."

2. ARIES generates a file based on your format choice and creates a link so that you can download it to your computer. Right click on the link and select Save Target As to save the file to your computer.



3. Click the **Download** button to save your file to your computer.

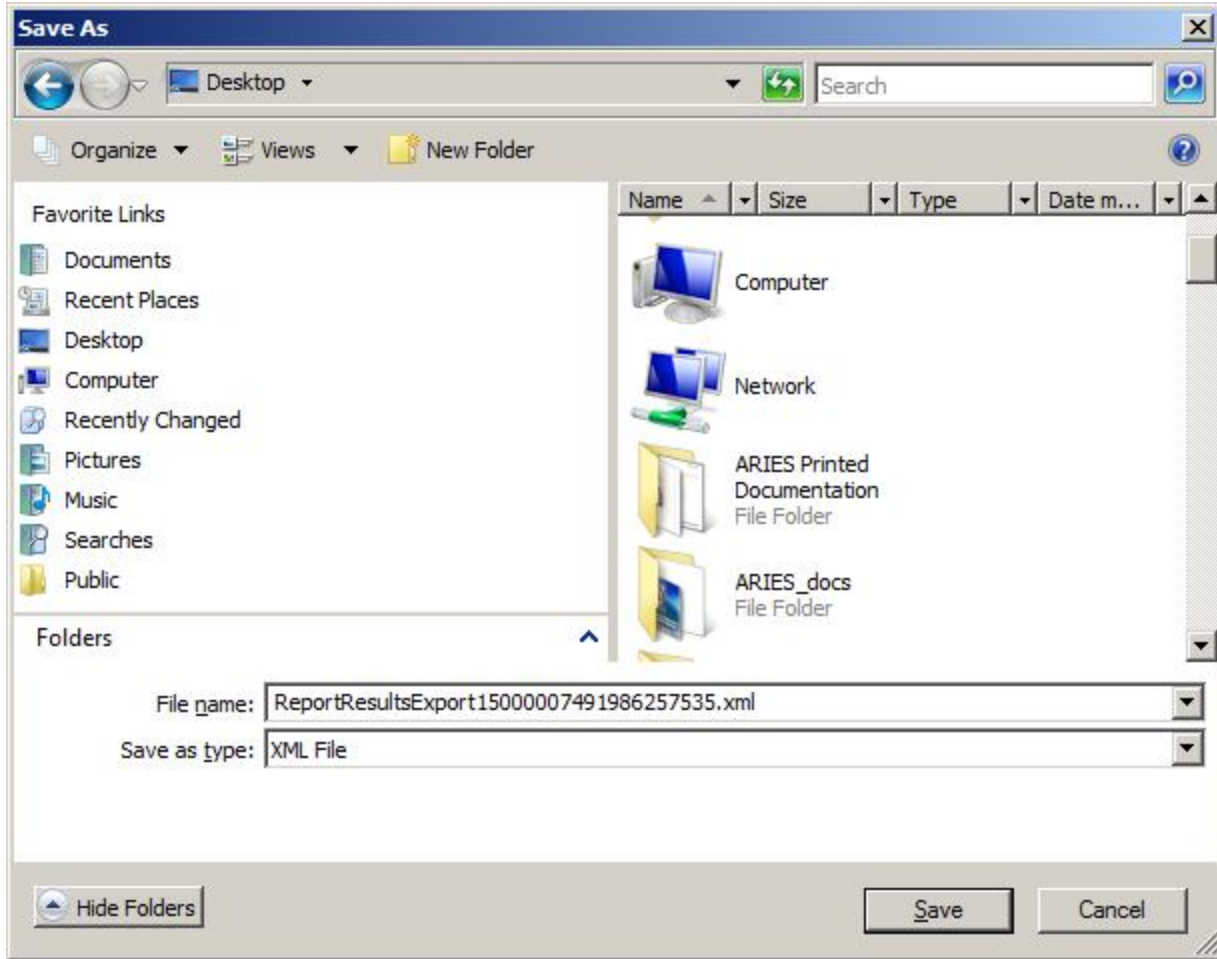


From the Download dialog box, select one of the following:



Open	Click Open to open the report on your computer screen.
Save	Click Save to open a dialog box that allows you to choose the file path where the file will be saved.
Cancel	Click Cancel to close the dialog box and return to the Report Results screen.

Note: The system assigns a filename to the download and displays it at the top of the Download dialog box. The file extension depends on the format you select for the download file (e.g., .xml for XML; .csv for Text, Comma-Separated; .txt for Text, Tab-Separated).

4. When you save your file, a Save As window opens to allow you to rename the file for your own filing purposes. Example: If your report is your monthly client roster, you might name it "client_roster_June2011.xml."



The file can then be imported into another application. After confirming the file name, select one of the following:

	Click Save to open a dialog box that allows you to choose the file path where the file will be saved.
	Click Cancel to close the dialog box and return to the Report Results screen.

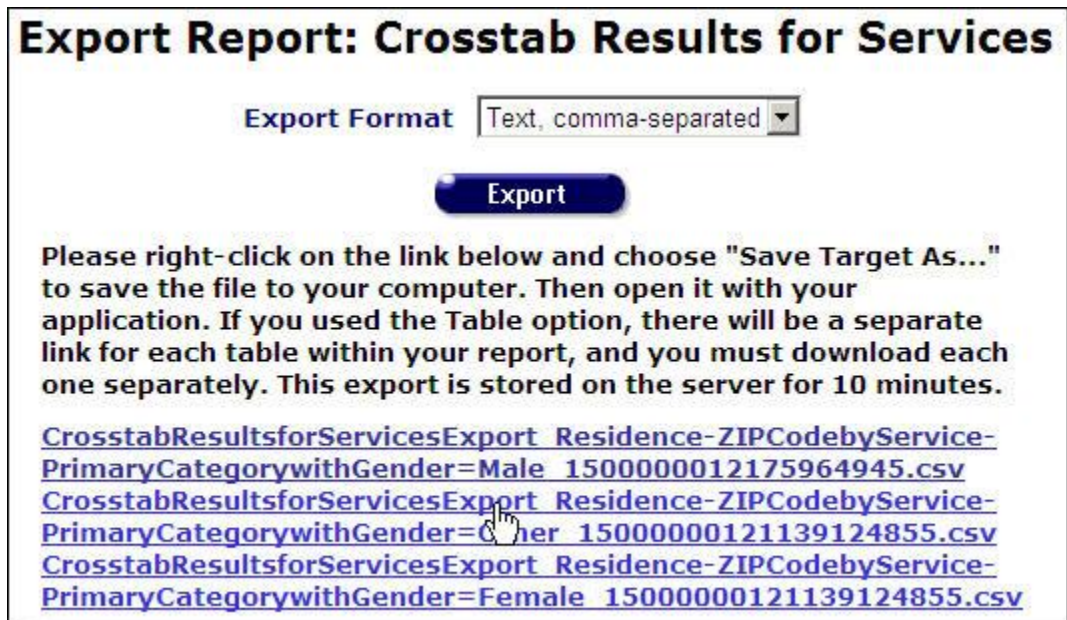
Exporting a Report with Multiple Tables

- Click the **Export** button, which takes you to the Export Format screen.

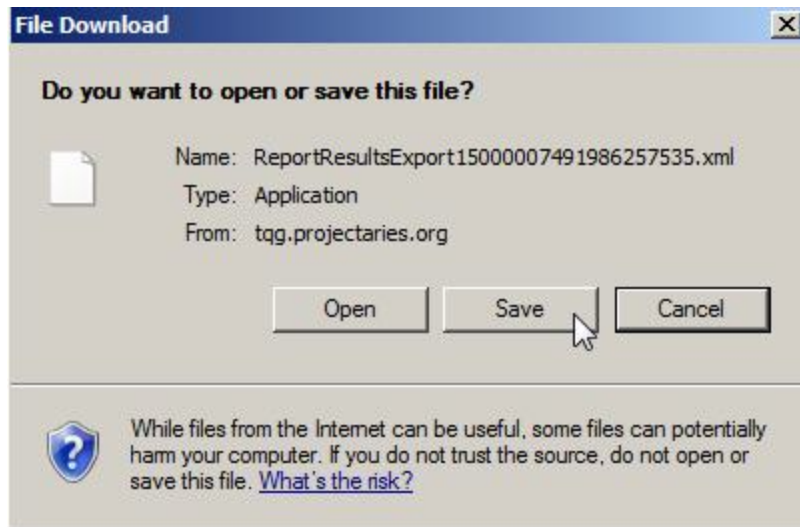


1. From the Export Format dropdown list, select the file format of your export file and click **Export**.

Note: If you will be importing your ARIES data into Microsoft Excel or Microsoft Access, use the "Text, comma-separated" export format. This produces a CSV file that can be opened directly in Excel or imported easily into Access. If you are importing your ARIES data into an analytical tool that uses XML as its native format, use the "XML" export format. The "Text, tab-separated" export format is provided for compatibility with older analytical tools.

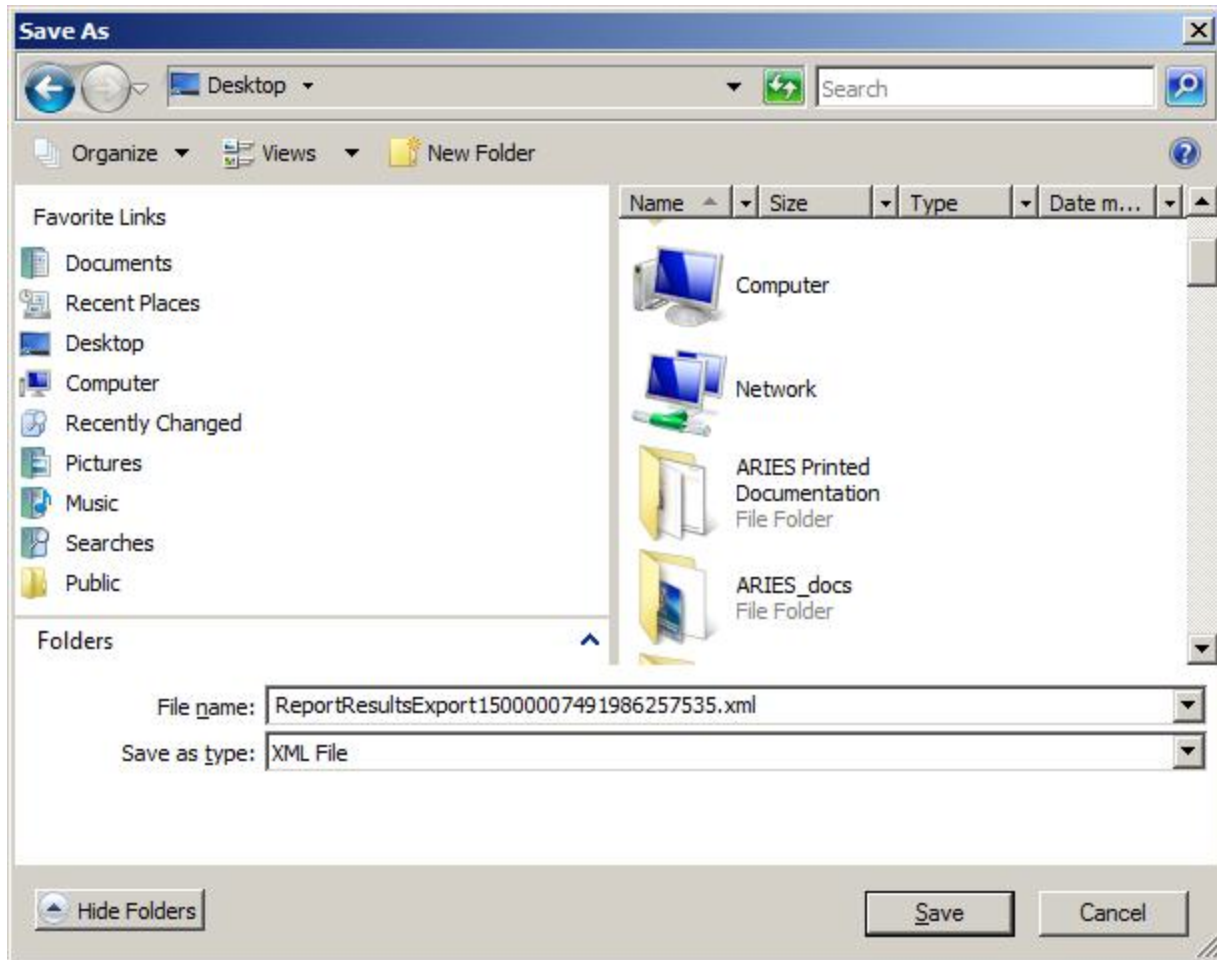


2. ARIES generates a file based on your format choice and creates multiple links for each table generated by your report so that you can download to your computer. Right-click on the link and select Save Target As for each separate link to include the full cross tab report and save the file to your computer.
3. Click the **Download** button to save your file to your computer.





Note: The system assigns a filename to the download and displays it at the top of the Download dialog box. The file extension depends on the format you select for the download file (e.g., .xml for XML; .csv for Text, Comma-Separated; .txt for Text, Tab-Separated).

4. When you save your file, a window opens to allow you to rename the file for your own filing purposes. Example: If your report is your monthly client roster, you might name it "client_roster_June2009.xml."



The file can then be imported into another application. After confirming the file name, select one of the following:

	Click Save to save your file to the designated path.
	Click Cancel to close the dialog box and return to the Report Results screen.

5.1.4 Printing Reports

To print your reports, in the Filter Values screen:

1. Check the **Display print format** checkbox before clicking the **Report** button. This generates a report without the ARIES menu bar on top or other navigational buttons.



2. On the Internet Explorer menu, click File. Select the **Print** option from the resulting dropdown. Consider printing in landscape format if the report table is very wide.
3. After printing your report, click the text link at the bottom of the screen to return to the Report screen.

5.1.5 Change Display Order

If you are an ARIES administrator and have the proper permissions, you can change the display order for the Client, Services, Finance, and Management reports screens.

- On the Reports screen, click the **Display Order** button to display the Change Display Order screen.

Note: This button is only visible with the proper permissions.





The preconfigured reports included with ARIES are listed in the order they display in the Reports screen.

- To change the placement of a report, select it in the list box and click the **up** or **down** button on the left to move it up or down the list.
- To hide a report from view, select it and click the **Hide** button. The report name moves to the Hidden Reports list.
- To unhide a report, select it from the Hidden Reports list and click the **Show** button. The report name moves back to the Shown Reports list.

Note: Customized ad-hoc reports do not display in this screen.

When you have finished configuring the report display order, select one of the following:

	Click Save to save your entries and return to the Reports screen.
	Click Cancel to return to the Reports screen without saving your entries.

5.2 Client Reports

The Client reports screen contains reports directly pertaining to clients and client management. For example, you can run a report that displays your agency's active clients.

- To access the Client Reports screen, from the [ARIES menu bar](#) at the top of the ARIES screen, choose the **Report > Client** menu item.

Client Reports	
Pending Eligibility Documents	Displays client, staff, document, intake date, and client contact information for each eligibility document whose status is pending. Filter by intake date.
Client Status	Displays client name, current status, previous status, date of last change, reason, and staff person for clients with selected status values over a range of dates.
Active Client Roster by Staff	Display staff person, client, and phone number for active clients. Filter by staff person.

The screen displays the name of the report along with a brief description of the report's function. To generate a report, click its name.

If you are an ARIES administrator and you want to change the order in which the reports are listed, click the **Display Order** button at the bottom of the screen, which takes you to the [Change Display Order](#) screen.

The Client Reports include:

- [Pending Eligibility Documents](#)
- [Client Status](#)
- [Active Client Roster by Staff](#)
- [Referrals](#)
- [Needs Assessment](#)
- [Immunizations](#)
- [Disease Management](#)
- [Statistical Analysis Report \(STAR\)](#)
- [Deleted Duplicate Clients by ARIES ID](#)
- Duplicate Clients Report
- HAART Drug Equivalency Report
- An additional report, [Client Detail](#), is accessible on a client's read-only Contact Info tab.

Note: The filter values on most ARIES reports include a date range requirement. Be aware that the wider the date range, the more information your report will contain; and the longer the time required to generate it.

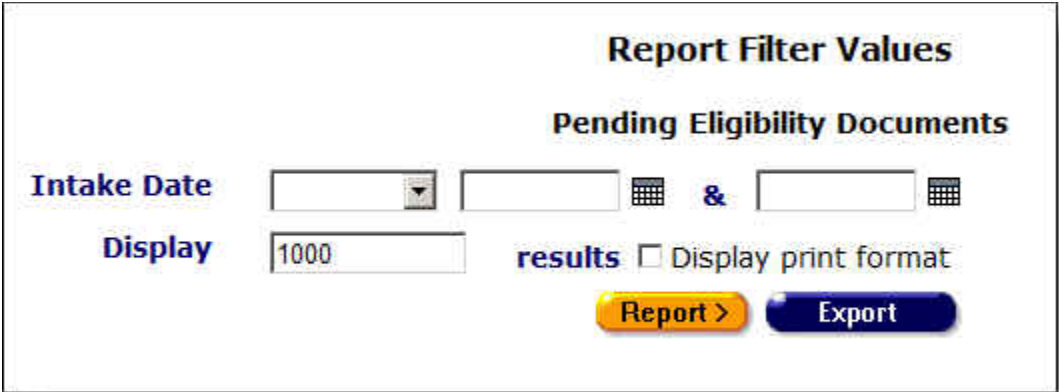
5.2.1 Pending Eligibility Documents

The Pending Eligibility Documents report generates a list of all client eligibility documents that have not been validated by your agency. Upon intake, clients may not have all the necessary documents necessary to enroll with your agency; therefore you may want to run this report periodically and follow up with clients who have incomplete documentation.

To access the report, from the ARIES menu bar at the top of the ARIES screen:


- Select the **Report > Client** menu item to get to the Client Reports screen.
- Click the "Pending Eligibility Documents" link.

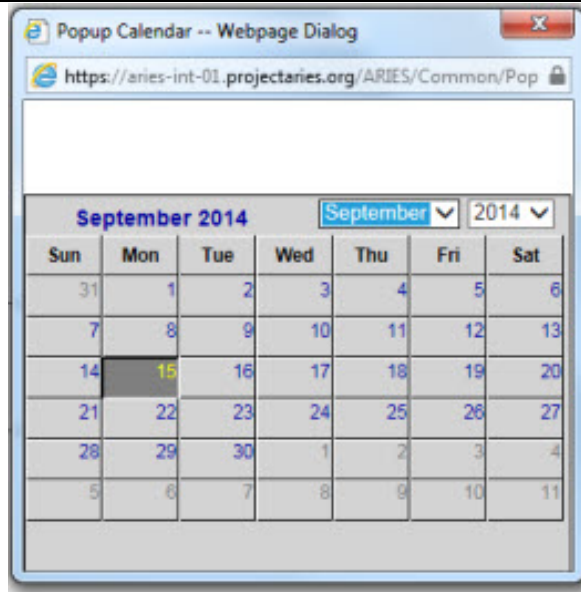
Report Filter Values



- Clicking on the link brings up the filter screen where you can define the parameters of your report.

Complete the fields as follows:

<p>Intake Date</p>	<p>From the dropdown list, select the intake date filter.</p> <p>Intake Date</p>  <p>To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.</p>
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Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Filters:



To filter for eligibility documents **on a given date**: Select "**On**" from the dropdown list and enter a date in the first text field to filter for records for a given day. Example: If you wanted to search for all missing eligibility documents for clients who enrolled on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for eligibility documents **before a given date**: Select "**Before**" from the dropdown list to sort through all entries before - but not including - a specific date. Example: If you wanted to search for all missing eligibility documents for clients who enrolled before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for eligibility documents **after a given date**: Select "**After**" from the dropdown list and enter a specific date to filter for records after a given day. Example: If you wanted to search for all missing eligibility documents for clients who enrolled after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.

To filter for eligibility documents **with a range of dates**: Select "**Between**" from the dropdown list to sort through all entries between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all records from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.

To filter through all eligibility documents **with no date**: Select "**Is Null**" from the dropdown list to sort through all records that have

	<p>no date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.</p> <p><u>To filter through all eligibility documents with a date</u>: Select "Is Not Null" from the dropdown list to sort through all records that have a date. Leave the text fields empty.</p> <p>To search all missing eligibility documents: Select the blank option from the dropdown and leave the text fields empty.</p>
Display	The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.
	Click this button to display the report results.
	Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

Report Results

Pending Eligibility Documents				
Client Name	Staff	Document	Intake	Client Contact Info
Shirley Abba	Cherie Alstott	ADAP	12/04/2006	Do not contact
Elgh Abcd	Cynthia Manor	Picture ID	09/15/2008	Do not contact
Jkn Abcd	bryan staff1	Agency Consent Form	11/24/2008	Do not contact
Jkn Abcd	Tom Backo	ADAP	11/24/2008	Do not contact
Ehira Abraham	San Antonio User1	Picture ID	02/18/2011	Do not contact
Mike Acosta	Rachel Garza	Picture ID	11/05/2010	Do not contact
John Afranklin	Chris McArdle	ADAP	01/19/2006	Do not contact
John Afranklin	Chris McArdle	ADAP	06/12/2006	Do not contact
John Afranklin	Chris McArdle	ADAP	01/19/2006	Do not contact
Lily Allen	San Antonio User1	Proof of Income	07/27/2010	Do not contact
Ynez Alley	Quang Nguyen	HOPWA	01/05/2005	
Ynez Alley	Quang Nguyen	Proof of Residency	01/05/2005	
Ynez Alley	Quang Nguyen	HOPWA	12/15/2005	
Ynez Alley	Quang Nguyen	Proof of Residency	12/15/2005	
Deanna Allison	Quang Nguyen	Picture ID	01/20/2005	214-698-7861 Messages OK.
Deanna Allison	Quang Nguyen	Picture ID	03/06/2006	214-698-7861 Messages OK.
Deanna Allison	Quang Nguyen	Picture ID	03/21/2006	214-698-7861 Messages OK.
Deanna Allison	Quang Nguyen	Picture ID	03/05/2008	214-698-7861 Messages OK.
San Antonio User1				Do not contact
Zzz Zzz	Quang Nguyen	Information	12/06/2005	
Zzz Zzz	Quang Nguyen	ARIES Consent Form	06/09/2006	Do not contact
Zzz Zzz	Quang Nguyen	Release of Information	06/09/2006	Do not contact
Zzz Zzz	Quang Nguyen	HOPWA	01/13/2005	312-768-8035 Be confidential. No messages.
Zzz Zzz	Quang Nguyen	Proof of Income	01/13/2005	312-768-8035 Be confidential. No messages.

685 records, generated 6/17/2011 9:02:08 AM
Criteria: Eligibility Document Is Pending = 1

[Export](#)

The report results display in a table alphabetized in ascending order by client name. From left to right the table lists the client name, the staff person who performed the intake, the missing document, the date of the intake, and the client's contact information.

- Clicking the staff person's name takes you to the staff detail page for the agency person.

Client Contact Information

Do not contact - The client does not want to be contacted in any way.

Do not phone - The client does not want to be contacted by telephone.

Messages OK - You can leave a phone message or a message with another person.

Be confidential - messages OK - You can leave a phone message or a message with another person but do not mention the name of the agency with the message.

Be confidential - no messages - The client does not want any message left on voice mail or with other persons.

The bottom of the table displays the number of records and the time and date of the report display, as well as the filter parameters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.2.2 Client Status

The Client Status report allows you to generate reports based on a client's status with your agency. In the report filter, you can specify the status of the clients. For example, if you wanted to generate a list of clients who became inactive in 2009 or if you want a list of current, active clients, the Client Status report can be configured to do either.

To access the report, from the ARIES menu bar at the top of the ARIES screen:

- Select the **Report > Client** menu item to access the Client Reports screen.
- Click the "Client Status" link.

Report Filter Values

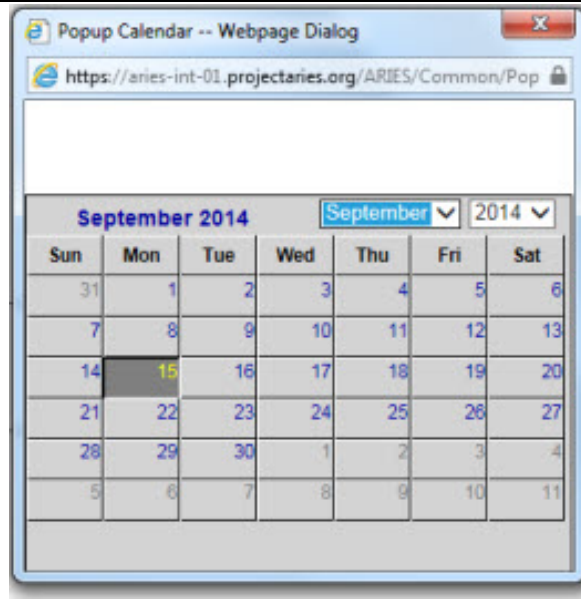
The screenshot shows a web-based form titled "Report Filter Values" with a sub-header "Client Status". The form contains the following elements:

- Status Change Date:** A dropdown menu set to "After", a text input field containing "4/1/2011", and a calendar icon.
- Status:** A dropdown menu with options: "All", "Active", "Inactive" (highlighted in blue), "Disenrolled", "Lost to Follow-Up", and "Discharged".
- Display:** A text input field containing "1000".
- Additional Options:** A "results" label, a checkbox for "Display print format" (which is unchecked), and two buttons: "Report >" (yellow) and "Export" (blue).

Clicking on the link brings up the filter screen where you can define the parameters of your report.

Complete the fields as follows:

Status Change Date	From the dropdown list, select the status change date filter. To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.
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Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Filters:

To filter for status changes **on a given date**: Select "**On**" from the dropdown list and enter a date in the first text field to filter for clients whose status changed on a given day. Example: If you wanted to search for all clients who disenrolled on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for status changes **before a given date**: Select "**Before**" from the dropdown list to filter for clients whose status changed before a given day. This will sort through all entries before – but not including – a specific date. Example: If you wanted to search for all clients who disenrolled before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.



To filter for status changes **after a given date**: Select "**After**" from the dropdown list and enter a specific date to filter for clients whose status changed after a given day. Example: If you wanted to search for all clients who disenrolled after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.

To filter for status changes **within a range of dates**: Select "**Between**" from the dropdown list to filter for clients whose status changed between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all records from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.

To filter through all status changes **with no date**: Select "**Is Null**" from the dropdown list to sort through all records that have no date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.

	<p>To filter through all status changes with a date: Select "Is Not Null" from the dropdown list to sort through all records that have a date. Leave the text fields empty.</p> <p>To search all status changes: Select the blank option from the dropdown and leave the text fields empty.</p>
Status List Box	<p>In the list box, select which client status type you wish to report on, e.g., All, Active, Inactive, Disenrolled, Lost to Follow-up, Discharged.</p> <p>To filter for a specific status type: Select the specific status type from the list box.</p> <p>To filter through multiple status types: Hold down the control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, if you wanted to report on the clients who were inactive, discharged, or disenrolled, click each selection while holding down the control key and each will be highlighted.</p> <p>To include all status types: Select All.</p>
Display	<p>The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.</p>
Display print format checkbox	<p>Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.</p>

After competing filter selections:

	Click this button to display the report results.
	Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

Report Results

Client Status						
ID	Client Name	Prev Status	Cur Status	Change Date	Reason	Status Changed By
	23 12	Active	Active	05/26/2008	New Enrollment	Agency Management
3842	Hal 9000	Active	Active	01/19/2010	New Enrollment	System Admin
H9000	Hal 9000	Active	Active	04/03/2008	New Enrollment	David Banck
	Hal 9000	Active	Active	06/10/2010	New Enrollment	Eileen Killoren
	Hal 9000	Active	Disenrolled	04/03/2008	Moved to LA	Agency Management
	Ann Aaa	Confirmed Deceased	Active	06/06/2006	was changed to deceased in error	System Admin
	Al Abb	Active	Active	08/20/2007	New Enrollment	Chris McArdle
	Jason Abba	Active	Active	02/19/2009	New Enrollment	San Antonio User1
	Mary Abba	Active	Active	07/29/2010	New Enrollment	Cindy Garza
	Mike Abba	Active	Active	02/19/2009	New Enrollment	Cindy Garza

10 records, generated 7/13/2011 9:11:21 PM
 Criteria: Export

The report results display in a table alphabetized in ascending order by client's agency ID. From left to right, the table lists the client's agency ID, the client name, their previous status, their current status, the date of the status change, the reason for the status change, and the name of the staff person who changed their status.

- Clicking the client name takes you to their contact info screen.
- Clicking a Status Changed By link will take you to the staff detail page for the agency person.

At the bottom of the table, the number of records and the time and date of the report display, and the filter parameters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.2.3 Active Client Roster by Staff

The Active Client Roster by Staff report generates a list of active clients at your agency and sorts them by the staff person. This report can give you a quick overview of your agency's clients. You can also filter by staff name. E.g., to access a case manager's client load, you can quickly run a report filtering out their last name.

To access the report, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Report > Client** menu item to get to the Client Reports screen.
- Click the "Active Client Roster by Staff" link.

Report Filter Values

Report Filter Values

Active Client Roster by Staff

Staff Last Name &

Staff Assignment Levels

- All
- 1
- 2
- 3
- 4



Display **results** Display print format

Report >
Export

Clicking on the link brings up the filter screen where you can define the parameters of your report.

Complete the fields as follows:

Staff Last Name	<p>From the dropdown list, select the filter by staff person.</p> <p><u>Filters:</u></p> <p><u>To filter for clients assigned to a specific staff person:</u> Select "Equals" from the dropdown list and enter the staff person's last name in the first text field. Example: Selecting "Equals" and entering "Jones" in the first text field filters for clients assigned to any staff person whose last name is Jones.</p> <p><u>To filter for a range of partial names of staff persons:</u> Select "Between" from the dropdown list and enter the alphabetical range you wish to report on. Example: To search records for staff persons whose last names start with letters from D through K, enter "D" and "L" in the two text fields. ARIES searches all entries from D up to, but not including, L.</p> <p><u>To filter through all records with no staff person entered:</u> Select "Is Null" from the dropdown list to sort through all records that have no data entered. Leave the text fields empty. This can be used to search for any clients who have not yet been assigned to a staff person.</p> <p><u>To filter through all records assigned to any staff person:</u> Select "Is Not Null" from the dropdown list to include only the clients who have been assigned to any staff person. Leave the text fields empty.</p> <p>To skip this filter, select the blank option from the dropdown list.</p>
Staff Assignment Levels	<p>This list box enables you to select which staff level assignments to include in the report. Select one or more staff levels, or select "All." To select more than one level, hold down the Ctrl key and click on your selections.</p>

	If you do not select any staff level, the system defaults to "All."
Display	The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.
After completing your filter parameters:	
	Click this button to display the report results.
	Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports.

Report Results

Active Client Roster by Staff		
Staff	Client Name	Client Contact Info
Catharin Abbott	Efgh Abcd	Do not contact
Catharin Abbott	Bandy Henkle	Do not contact
Sys Admin	Adam Smith	Do not contact
User1_Agencyd	Tim Nelson	Do not contact
Rhetta Alexander	Linda Maranville	818-555-1212 Messages OK.
Rhetta Alexander	Aaron Smith	210-555-4455 Be confidential. No messages.
Rhetta Alexander	Aaron Smith	210-555-4455 Be confidential. No messages.
Rhetta Alexander	Aaron Smith	210-555-4455 Be confidential. No messages.
Admin LACountyPH	Tina Fey	938-555-1212
Calvin Lee	Tina Fey	Do not contact
Christine Leivermann	Me Hart	777-222-7777 Be confidential. Messages OK.
Christine Leivermann	Bat Man	Do not contact
Bill Li	Corn Poo	619-238-0455 Messages OK.

289 records, generated 6/17/2011 9:59:05 AM
Criteria: Agency Specifics Client Status = 'Active' AND Staff Last Name BETWEEN 'A' AND 'M'



The report results display in a table alphabetized in ascending order by the staff person. From left to right, on the table lists the staff person, the client name, and the client's phone number.

- Clicking a staff person's name takes you to the Staff Detail page for the agency person.
- Clicking a client's name takes you to their Contact Info screen.

Client Contact Information

Do not contact - The client does not want to be contacted in any way.

Do not phone - The client does not want to be contacted by telephone.

Messages OK - You can leave a phone message or a message with another person.

Be confidential - messages OK - You can leave a phone message or a message with another person but do not mention the name of the agency with the message.

Be confidential - no messages - The client does not want any message left on voice mail or with other persons.

The bottom of the table displays the number of records and the time and date of the report display, and the filter parameters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.2.4 Referrals Report

Clients often receive [referrals](#) to other agencies. Staff persons who enter referrals enter in a target date for the client to meet with the referred agency. In subsequent follow-ups, the outcome of the referral is recorded.

The Referrals Report helps track referrals and their outcomes. For example, before performing referral follow-ups, you can run a report on referrals that have not yet had outcomes entered.

To access the report, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Report > Client** menu item to get to the Client Reports screen.
- Click the "Referrals" link.

Report Filter Values

Report Filter Values

Referrals

Staff Last Name &

Primary Service

- Outpatient/Ambulatory Medical Care
- AIDS Pharmaceutical Assistance (local)
- Oral Health Care
- Early Intervention Services (Parts A and B)
- Home Health Care

Referral Date &

Outcome Date &

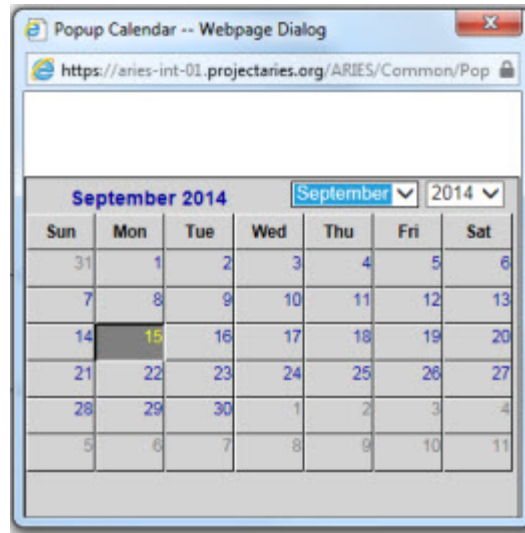
Display **results** Display print format

Report > **Export**

Clicking on the link brings up the filter screen where you can define the parameters of your report.

Complete the fields as follows:

<p>Staff Last Name</p>	<p>From the dropdown list, select the filter to search for referrals by staff person.</p> <p><u>Filters:</u></p> <p>To filter for clients assigned to a specific staff person: Select "Equals" from the dropdown list and enter the staff person's last name in the first text field. Example: Selecting "Equals" and entering "Jones" in the first text field filters for clients assigned to any staff person whose last name is Jones.</p> <p>To filter for a range of partial names of staff persons: Select "Between" from the dropdown list and enter the alphabetical range you wish to report on. Example: To search records for staff persons whose last names start with letters from D through K, enter "D" and "L" in the two text fields. ARIES searches all entries from D up to, but not including, L.</p> <p>To filter through all records with no staff person entered: Select "Is Null" from the dropdown list to sort through all records that have no data entered. Leave the text fields empty. This can be used to search for any clients who have not yet been assigned to a staff person.</p> <p>To filter through all records assigned to any staff person: Select "Is Not Null" from the dropdown list to include only the clients who have been assigned to any staff person. Leave the text fields empty.</p> <p><u>To skip this filter</u>, select the blank option from the dropdown list.</p>
<p>Primary Service list box</p>	<p>You can also search by service type using the Primary Service filter.</p> <p><u>Filters:</u></p> <p>To filter for a specific primary service: Select the specific primary service from the list box.</p> <p>To filter through multiple primary services: Hold down the Control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, if you wanted to report on the Oral Health Care and Home Health Care, click each selection while holding down the Control key and each will be highlighted.</p> <p>To include all primary services: Select All.</p>
<p>Referral Date</p>	<p>From the dropdown list, select the referral date filter. To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.</p>



Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Filters:

To filter for **referrals on a given date**: Select "**On**" from the dropdown list and enter a date in the first text field to filter for referrals on a given day. Example: If you wanted to search for all referrals on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for **referrals before a given date**: Select "**Before**" from the dropdown list to filter for referrals before a given day. This will sort through all entries before – but not including – a specific date. Example: If you wanted to search for all referrals before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for **referrals after a given date**: Select "**After**" from the dropdown list and enter a specific date to filter for referrals after a given day. Example: If you wanted to search for all clients who enrolled after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.



To filter for **referrals between a range of dates**: Select "**Between**" from the dropdown list to filter for clients whose referral date is between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all referrals from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.

To filter through **all referrals with no date**: Select "**Is Null**" from the dropdown list to sort through all referrals that have no date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.

	<p>To filter through all referrals with a date: Select "Is Not Null" from the dropdown list to sort through all referrals that have a date. Leave the text fields empty.</p> <p>To search all referrals: Select the blank option from the dropdown and leave the text fields empty.</p>
<p>Outcome Date</p>	<p>Outcome dates are recorded after a follow-up has been made on the referral.</p> <p>From the dropdown list, select the outcome date filter. To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.</p> <p>Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.</p> <p>Filters:</p> <p>To filter for outcomes on a given date: Select "On" from the dropdown list and enter a date in the first text field to filter for outcomes on a given day. Example: If you wanted to search for all outcomes on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.</p> <p>To filter for outcomes before a given date: Select "Before" from the dropdown list to filter for outcomes before a given day. This will sort through all entries before – but not including – a specific date. Example: If you wanted to search for all outcomes before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.</p> <p>To filter for outcomes after a given date: Select "After" from the dropdown list and enter a specific date to filter for outcomes after a given day. Example: If you wanted to search for all outcomes after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.</p> <p>To filter for outcomes between a range of dates: Select "Between" from the dropdown list to filter for outcomes between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all outcomes from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.</p> <p>To filter through all outcomes with no date recorded: Select "Is Null" from the dropdown list to sort through all outcomes that have no date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.</p> <p>To filter through all outcomes with a recorded date: Select "Is Not Null" from the dropdown list to sort through all outcomes that have a date. Leave the text fields empty.</p> <p>To search all outcomes: Select the blank selection from the dropdown and leave the text fields empty.</p>

Display	The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.


After completing your filter selections:

	Click this button to display the report results.
	Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

Report Results

Referrals						
Client Name	Ref Date	Agency	Target	Outcome	Staff	Client Contact Info
Bilbo Baggins	05/24/2011	ADA			Bob Bongiovanni	919-212-9119 Be confidential. No messages.
Ria Baker	01/25/2011	CVM	01/25/2011		San Antonio User1	210-555-8888 Be confidential. No messages.
Norma Birsa	05/10/2011	ADA	05/13/2011		Bob Bongiovanni	Do not contact
Laura Castro	03/11/2011	CVM	03/14/2011		San Antonio User1	Do not contact
Josie Champaigne	01/05/2011	CVM	01/06/2011		San Antonio User1	Do not contact
Miles Davis	05/19/2011	CVM	05/23/2011		San Antonio User1	Do not contact
Paula Dean	02/28/2011	CVM	02/28/2011		San Antonio User1	Do not contact
Jennifer Ferris	03/11/2011	CVM	03/21/2011		San Antonio User1	Do not contact
Julia Graham	01/03/2011	CVM	01/17/2011		San Antonio User1	Do not contact
Jennifer Hussey	02/28/2011	CVM	02/28/2011		San Antonio User1	202-555-4598 Be confidential. Messages OK.
Suzy Johns	05/19/2011	CVM	05/23/2011		San Antonio User1	Do not contact
Michelle Jordan	05/19/2011	CVM	05/23/2011		San Antonio User1	Do not contact
Luis Nolasco	03/11/2011	CVM	03/14/2011		San Antonio User1	Do not contact
Cat Powers	05/19/2011	CVM	05/23/2011		San Antonio User1	Do not contact
Julia Ramirez	01/05/2011	CVM	01/06/2011		San Antonio User1	Do not contact
Rachel Ray	03/11/2011	CVM	03/14/2011		San Antonio User1	Do not contact
Donna Summers	05/19/2011	CVM	05/23/2011		San Antonio User1	Do not contact
Matrisa Tilghman	03/11/2011	CVM	03/14/2011		San Antonio User1	Do not contact
Mary Ysatis	03/25/2011	CVM			Mary Sosa	Do not contact

19 records, generated 6/17/2011 9:18:37 AM
Criteria: Referral Primary Service IN ('Outpatient/Ambulatory Medical Care','Oral Health Care') AND Referral Referral Date > '1/1/2011'



The report results display in a table alphabetized in ascending order by the client name. From left to right, the table displays the client name, their referral date, the agency who referred them, their target referral appointment date, the date of the referral outcome, the staff person who made the referral, and the client's contact information.

- Clicking a staff or agency will take you to the staff detail page for the agency person.
- Clicking a client name will take you to their contact info screen.

Client Contact Information

Do not contact - The client does not want to be contacted in any way.

Do not phone - The client does not want to be contacted by telephone.

Messages OK - You can leave a phone message or a message with another person.

Be confidential - messages OK - You can leave a phone message or a message with another person but do not mention the name of the agency with the message.

Be confidential - no messages - The client does not want any message left on voice mail or with other persons.

The bottom of the table displays the number of records and the time and date of the report display, and the filter parameters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.2.5 Needs Assessment

Case managers routinely perform needs assessments for clients, evaluating what services they require. Agency managers and administrators can track the number of needs assessments performed by an agency by region, date, and assessment type.

To access the report, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Report > Client** menu item to get to the Client Reports screen.
- Click the "Needs Assessment" link.

Report Filter Values

Report Filter Values

Needs Assessment

Assessment Date After &

Geographic Area/HSDA All
4801-Lubbock
4802-Arlington
4803-Arlington
4804-Tyler
4805-Tyler

Category Ryan White/Medical Case Management (including Treatment Adherence)
Ryan White/Substance Abuse Services - Outpatient
Ryan White/Case Management (non-medical)
Ryan White/Child Care Services
Ryan White/Pediatric Development Assessment/Early Intervention Services
Ryan White/Emergency Financial Assistance

Display **results** Display print format

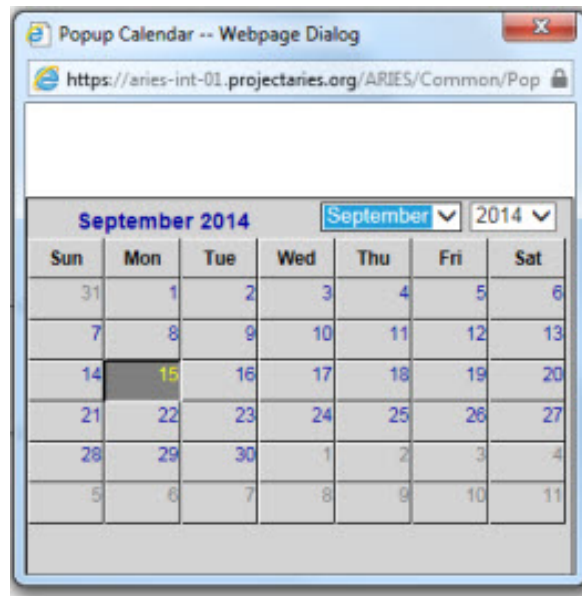
Report > **Export**

Clicking on the link brings up the filter screen where you can define the parameters of your report.

Complete the fields as follows:

Assessment Date

From the dropdown list, select the assessment date filter. To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.



Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Filters:

To filter for assessments **on a given date**: Select "**On**" from the dropdown list and enter a date in the first text field to filter for assessments on a given day. Example: If you wanted to search for all assessments on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.


To filter for assessments **before a given date**: Select "**Before**" from the dropdown list to filter for assessments before a given day. This will sort through all entries before, but not including, a specific date. Example: If you wanted to search for all assessments before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for assessments **after a given date**: Select "**After**" from the dropdown list and enter a specific date to filter for assessments after a given day. Example: If you wanted to search for all assessments after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.

To filter for assessments **within a range of dates**: Select "**Between**" from the dropdown list to filter for assessments between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all assessments from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.

	<p>To filter through all assessments with no date: Select "Is Null" from the dropdown list to sort through all assessments that have no date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.</p> <p>To filter through all assessments with a date: Select "Is Not Null" from the dropdown list to sort through all assessments that have a date. Leave the text fields empty.</p> <p>To search all assessments: Select the blank option from the dropdown and leave the text fields empty.</p>
<p>Geographic Area/HSDA list box</p>	<p>From the list box, select which types of categories you want to include in your report.</p> <p>To filter for a specific category: Select the specific category from the list box.</p> <p>To filter through multiple categories: Hold down the Control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, if you wanted to report on the Child Care and Case Management, click each selection while holding down the Control key and each will be highlighted.</p> <p>To include all categories: Select All.</p>
<p>Categories list box</p>	<p>From the list box, select which types of categories you want to include in your report.</p> <p>To filter for a specific category: Select the specific category from the list box.</p> <p>To filter through multiple categories: Hold down the Control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, if you wanted to report on the Child Care and Case Management, click each selection while holding down the Control key and each will be highlighted.</p> <p>To include all categories: Select All.</p>
<p>Display</p>	<p>The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.</p>
<p>Display print format checkbox</p>	<p>Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.</p>

After completing your filter selections:

	<p>Click this button to display the report results.</p>
---	---




Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled [Exporting Reports](#).

Report Results

Needs Assessment				
Geographic Area	Category	Needed	Count	% Total Clients
4801-Lubbock	Case Management (non-medical)	Unknown	1	0.03
4801-Lubbock	Emergency Financial Assistance	Unknown	1	0.03
4801-Lubbock	Medical Case Management (including Treatment Adherence)	Unknown	1	0.03

3 records, generated 6/17/2011 9:44:12 AM
Criteria: Needs Assessment Date > 4/1/2011 AND Address Geographic Area IN ('4801-Lubbock','4803-Arlington','4805-Tyler') AND Need Category IN ('Medical Case Management (including Treatment Adherence)','Case Management (non-medical)','Emergency Financial Assistance')



The Needs Assessment Report results display in a table listed in order of geographic area. The table lists from left to right the geographic area, the category of needs assessment, whether services were needed, and how many services were needed.

The bottom of the table displays the number of records and the time and date of the report display, and the filter parameters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.2.6 Immunizations

Immunizations Reports display client names and immunizations they have received. You can filter these reports by date of immunization and immunization type. For example, you may want to generate a list of all clients who received hepatitis immunizations in a given year.

To access the report, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Report > Client** menu item to get to the Client Reports screen.
- Click the "Immunizations" link.

Report Filter Values

Report Filter Values

Immunizations

Test Type Flu
Hepatitis A
Hepatitis B - Dose 1
Hepatitis B - Dose 2
Hepatitis B - Dose 3
PCP

Test Date Before 4/1/2011 &

No Test

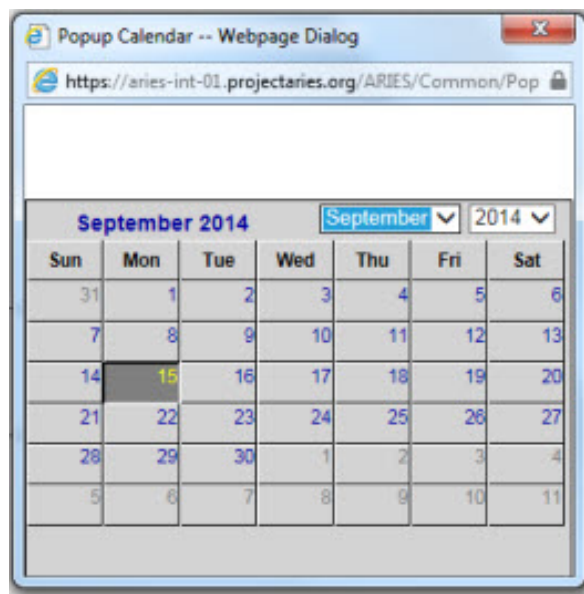
Display 1000 **results** Display print format

Report >
Export

Clicking on the link brings up the filter screen where you can define the parameters of your report.

Complete the fields as follows:

Test type list box	<p>From the list box, select which immunization types you want to report on.</p> <p><u>To filter for a specific immunization</u>: Select the specific immunization from the list box.</p> <p><u>To report on multiple immunizations</u>: Hold down the Control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, if you wanted to report on all hepatitis immunizations, select "Hepatitis A" and "Hepatitis B" while holding down the Control key and each will be highlighted.</p> <p><u>To include all immunizations</u>: Select All.</p>
Test Date	<p>From the dropdown list, select the test date filter. To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.</p>



Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Filters:

To filter for tests **on a given date**: Select "**On**" from the dropdown list and enter a date in the first text field to filter for tests on a given day. Example: If you wanted to search for all tests on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for tests **before a given date**: Select "**Before**" from the dropdown list to filter for tests before a given day. This will sort through all entries before, but not including, a specific date. Example: If you wanted to search for all tests before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.



To filter for tests **after a given date**: Select "**After**" from the dropdown list and enter a specific date to filter for tests after a given day. Example: If you wanted to search for all tests after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.

To filter for tests **within a range of dates**: Select "**Between**" from the dropdown list to filter for tests between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all tests from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.

To filter through **all tests with no date**: Select "**Is Null**" from the dropdown list to sort through all tests that have no date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.

	<p>To filter through all tests with a date: Select "Is Not Null" from the dropdown list to sort through all tests that have a date. Leave the text fields empty.</p> <p>To search all tests: Select the blank option from the dropdown and leave the text fields empty.</p>
Display	<p>The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.</p>
Display print format checkbox	<p>Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.</p>


After completing your filter selections:

	Click this button to display the report results.
	Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

Report Results

Immunizations			
Client Name	Immunization Date	Immunization	Client Contact Info
Hal 9000	02/15/2010	Hepatitis B - Dose 3	Do not contact
Hal 9000	02/15/2010	Hepatitis B - Dose 3	Do not contact
Hal 9000	02/15/2010	Hepatitis B - Dose 3	Do not contact
Hal 9000	02/15/2010	Hepatitis B - Dose 3	Do not contact
Lily Allen	07/13/2010	Hepatitis B - Dose 1	Do not contact
Ynez Alley	07/04/2006	Hepatitis B - Dose 3	
Ynez Alley	07/04/2006	Hepatitis B - Dose 3	
Deanna Allison	04/30/2004	Hepatitis A	214-698-7861 Messages OK.
Deanna Allison	04/30/2004	Hepatitis A	214-698-7861 Messages OK.
Deanna Allison	04/30/2004	Hepatitis A	214-698-7861 Messages OK.
Deanna Allison	04/30/2004	Hepatitis A	214-698-7861 Messages OK.
	12/01/2008		Do not contact
Zzz Zzz		Hepatitis B - Dose 3	
Zzz Zzz	08/07/2004	Hepatitis B - Dose 3	Do not contact
Zzz Zzz	08/07/2004	Hepatitis B - Dose 3	Do not contact
Zzz Zzz	12/09/2004	Hepatitis B - Dose 3	312-768-8035 Be confidential. No messages.

455 records, generated 6/17/2011 9:50:53 AM
 Criteria: Immunization IN ('Hepatitis A','Hepatitis B - Dose 1','Hepatitis B - Dose 2','Hepatitis B - Dose 3') AND ImmunizationDate < 4/1/2011'



The report results display in a table alphabetized in ascending order by the client name. From left to right, the table lists the client name, immunization date, immunization type, and client contact information.

- Clicking a client's name will take you to their contact info screen.

Client Contact Information

Do not contact - The client does not want to be contacted in any way.

Do not phone - The client does not want to be contacted by telephone.

Messages OK - You can leave a phone message or a message with another person.

Be confidential - messages OK - You can leave a phone message or a message with another person but do not mention the name of the agency with the message.

Be confidential - no messages - The client does not want any message left on voice mail or with other persons.

The bottom of the table displays the number of records and the time and date of the report display, and the filter parameters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.2.7 Disease Management

The ways in which HIV+ status is monitored include CD4 lymphocyte count and viral load test results. The ARIES Disease Management Report enables you to compare clients' test results from two time periods. This can give a broad view of your agency's clients' progress.

To access the report, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Reports > Client** menu item to get to the [Client Reports](#) screen.
- Click the "Disease Management" link.

Report Filter Values

Report Filter Values

Disease Management

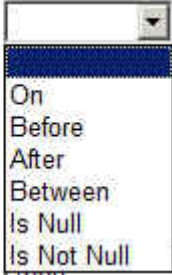
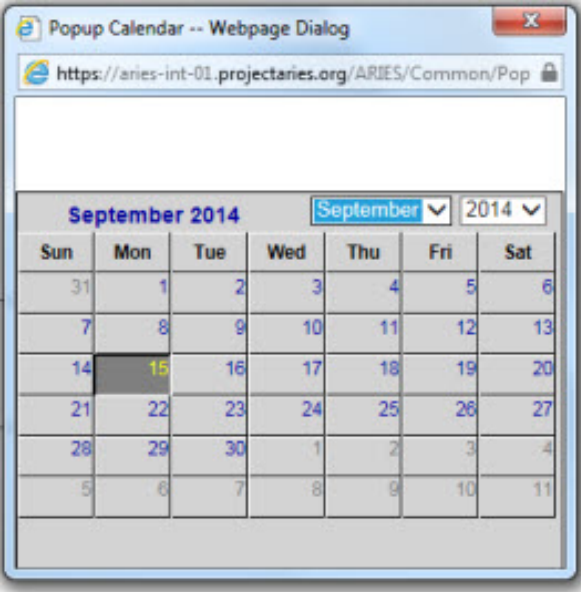
Initial CD4 Date	Between ▾	<input type="text"/>	&	<input type="text"/>	
Final CD4 Date	Between ▾	<input type="text"/>	&	<input type="text"/>	
Initial Viral Load Date	Between ▾	<input type="text"/>	&	<input type="text"/>	
Final Viral Load Date	Between ▾	<input type="text"/>	&	<input type="text"/>	
Display		<input type="text" value="1000"/>	results	<input type="checkbox"/> Display print format	

Report >
Export

Clicking on the link brings up the filter screen where you can define the filters for your report.

Complete the fields as follows.



- **Note:** Generally, the report should be run with the same date ranges on all four lines.

<p>Initial CD4 Date</p>	<p>From the dropdown list, select the test date filter.</p> <p>Initial CD4 Date</p>  <p>To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.</p>  <p>Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.</p> <p><u>Filters:</u></p> <p><u>To filter for CD4 test on a given date:</u> Select "On" from the dropdown list and enter a date in the first text field to filter for records for a given day. Example: If you wanted to search for all CD4 tests for clients who enrolled on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.</p> <p><u>To filter for CD4 test before a given date:</u> Select "Before" from the dropdown list to sort through all entries before - but not including - a specific date. Example: If you wanted to search for all CD4 tests for clients who enrolled before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.</p>
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	<p>To filter for CD4 test after a given date: Select "After" from the dropdown list and enter a specific date to filter for records after a given day. Example: If you wanted to search for all CD4 tests for clients who enrolled after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.</p> <p>To filter for CD4 test with a range of dates: Select "Between" from the dropdown list to sort through all entries between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all records from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.</p> <p>To filter through all CD4 tests with no date: Select "Is Null" from the dropdown list to sort through all records that have no date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.</p> <p>To filter through all CD4 tests with a date: Select "Is Not Null" from the dropdown list to sort through all records that have a date. Leave the text fields empty.</p> <p>To search all missing CD4 tests: Select the blank option from the dropdown and leave the text fields empty.</p>
<p>Final CD4 Date</p>	<p>From the dropdown list, select the final CD4 date filter.</p> <p>To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.</p> <ul style="list-style-type: none"> Remember that the report should generally be run with the same date ranges on all four lines. <p>Set the date filters as appropriate for the operator selected. See the "Initial CD4 Date" field description.</p>
<p>Initial Viral Load Date</p>	<p>From the dropdown list, select the initial viral load date filter.</p> <p>To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.</p> <ul style="list-style-type: none"> Remember that the report should generally be run with the same date ranges on all four lines. <p>Set the date filters as appropriate for the operator selected. See the "Initial CD4 Date" field description.</p>
<p>Final Viral Load Date</p>	<p>From the dropdown list, select the final viral load date filter.</p> <p>To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.</p> <ul style="list-style-type: none"> Remember that the report should generally be run with the same date ranges on all four lines. <p>Set the date filters as appropriate for the operator selected. See the "Initial CD4 Date" field description.</p>

<p>Display</p>	<p>The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.</p>
<p>Display print format checkbox</p>	<p>Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.</p>


After completing your filter selections:

	<p>Click this button to display the report results.</p>
	<p>Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports.</p>

Report Results

Disease Management													
urnExtended	gender	Race, with Hispanic	Staff	CD4 Init	CD4 Init Date	CD4 Final	CD4 Final Date	CD4 Change	Viral Init	Viral Init Date	Viral Final	Viral Final Date	Viral Change
EVAR0901782RGN	Female	Hispanic or Latino(a)		200	02/01/11	200	02/01/11	same +/- 5%	0		0		
FLCT1212721TGT	Male	Black or African American (not Hispanic)		550	01/30/11	550	01/30/11	same +/- 5%	0		0		
HL900320781JMC	Male	Hispanic or Latino(a)	Brown, Deborah	333	02/07/11	444	04/26/11	increased > 5%	200	05/27/11	200	05/27/11	same +/- 5%
HL900320781JMC	Male	Hispanic or Latino(a)	Brown, Deborah	333	02/07/11	444	04/26/11	increased > 5%	200	05/27/11	200	05/27/11	same +/- 5%
HL900320781JMC	Male	Hispanic or Latino(a)	Brown, Deborah	333	02/07/11	444	04/26/11	increased > 5%	200	05/27/11	200	05/27/11	same +/- 5%
HL900320781JMC	Male	Hispanic or Latino(a)	Brown, Deborah	333	02/07/11	444	04/26/11	increased > 5%	200	05/27/11	200	05/27/11	same +/- 5%
JLGA0103752MGL	Female	White (not Hispanic)		468	01/01/11	468	01/01/11	same +/- 5%	0		0		
JNHS1114662MJM	Female	White (not Hispanic)		4500	02/07/11	4500	02/07/11	same +/- 5%	0		0		
JSCA0103752JGL	Female	Hispanic or Latino(a)	Allison, Clay	350	01/03/11	350	01/03/11	same +/- 5%	1245	01/03/11	1245	01/03/11	same +/- 5%
MRMN1014672TCR	Female	Hispanic or Latino(a)		349	02/01/11	349	02/01/11	same +/- 5%	0		0		
MRYA10016129LZ	Female	Hispanic or Latino(a)		800	03/05/11	800	03/05/11	same +/- 5%	0		0		
SLSC0101852BSC	Female	Native Hawaiian or Other Pacific Islander		450	02/01/11	450	02/01/11	same +/- 5%	50	02/01/11	50	02/01/11	same +/- 5%
SRBR0103752AGL	Female		Brown, Deborah	0		0			140	01/05/11	140	01/05/11	same +/- 5%
SRRD0101862KSI	Female	White (not Hispanic)		582	01/06/11	582	01/06/11	same +/- 5%	2000	01/06/11	2000	01/06/11	same +/- 5%
ZCAH1016671ARS	Male	Hispanic or Latino(a)	Sybil, James	1500	01/06/11	1500	01/06/11	same +/- 5%	16000	02/05/11	1000000	06/22/11	increased > 5%

15 records, generated 7/14/2011 10:31:48 AM
 Criteria: Filter 1 BETWEEN '1/1/2011 12:00:00 AM' AND '6/30/2011 12:00:00 AM' AND Filter 2 BETWEEN '1/1/2011 12:00:00 AM' AND '6/30/2011 12:00:00 AM' AND Filter 3 BETWEEN '1/1/2011 12:00:00 AM' AND '6/30/2011 12:00:00 AM' AND Filter 4 BETWEEN '1/1/2011 12:00:00 AM' AND '6/30/2011 12:00:00 AM'



- This example assumes a test timespan obtained by using the "Between" operator.

The Disease Management Report results display a table sorted by the [Extended URN](#) value. From left to right, the table lists the client's extended URN, Gender, HRSA Race, the staff person assigned to the client, the initial CD4 lymphocyte count, the initial count date, the final CD4 lymphocyte count, the final count date and the percentage of difference, if any, between the two test values. The five columns on the right display corresponding values for viral load tests.

The bottom of the table displays the number of records and the time and date of the report, with the filter parameters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.2.8 Deleted Duplicate Clients by ARIES ID

The Deleted Duplicate Clients by ARIES ID Report displays the log of duplicate clients that have been merged. This report is sorted in numerical order by ARIES ID, with the lowest ID number first. The report also shows the client's last name, first name, middle initial, date of birth, old ARIES ID client 1, old ARIES ID client 2, and merge date.

Accessing the Report

- To access the report, from the ARIES menu bar at the top of the ARIES screen, choose the **Report > Client** menu item which takes you to the Client Report menu. Click the Deleted Duplicated Clients by ARIES ID Report link.


A default version of the report is displayed. Toward the right side, the Staff column displays the name of the staff person who performed the merge, and the Agency column displays the agency for which that staff person works.

New Aries ID	LastName	First Name	Date of Birth	Old Aries ID Client1	Old Create Staff Client1	Old Create Agency Client1	Old Create Date Client1	Old Aries ID Client2	Old Create Staff Client2	Old Create Agency Client2	Old Create Date Client2	Staff	Agency	Merge Date
10060096	Frederick	Peggy	06/07/1966	10059857				10059856				System Admin	DSHS	07/26/2010
10060156	Scranton	Rhonda	11/30/1969	10060100				10060103				System Admin	DSHS	01/05/2011
10060200	Prince	Virginia	06/01/1979	100601269				100599414				System Admin	DSHS	09/30/2011
10060209	Grayson	Arnold	12/22/1964	100601517				100601962				System Admin	DSHS	10/21/2011
100602473	Zula	Zambia	11/30/1989	100602164				100602356				System Admin	DSHS	01/10/2012

You can change the report parameters by unchecking the Null boxes to the right of ARIES ID Min, ARIES ID Max, Merge Start Date and Merge End Date.

ARIES ID Min	The lowest ID number in the range on which you want to report.
ARIES ID Max	The highest ID number in the range on which you want to report.
Merge Start Date	The beginning date in the range on which you want to report.
Merge End Date	The ending date in the range on which you want to report.

When you have entered the parameters:

	Click this button to display the new report results with your parameters.
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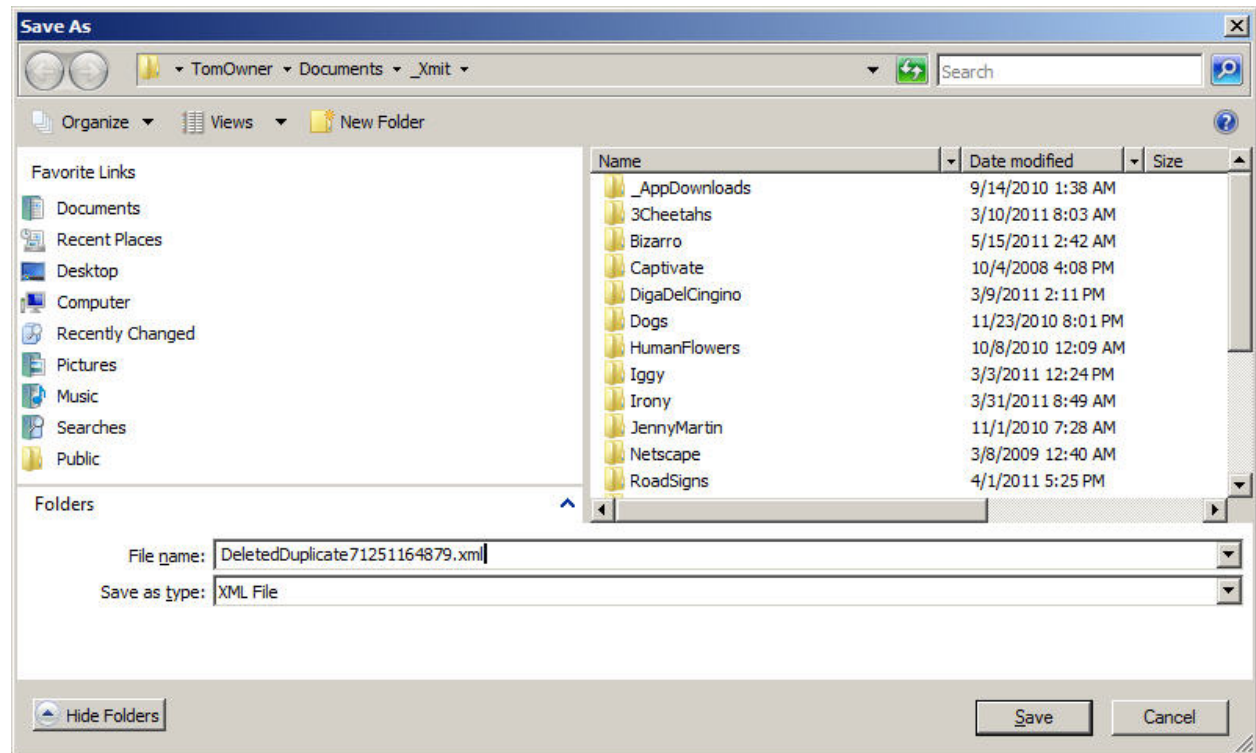
<p>Results Ribbon</p>	<p>The Results page displays a ribbon of icons across the screen and directly below the parameters fields. For a description of these icons, see the Results Ribbon topic.</p>
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Changing the Name of the Download File

When you click on the **Export** button on the results ribbon, a dialog opens at the bottom of the results page, giving you the option of changing the name of the download file.



- Click **Save** and then **Save As** from the resulting dropdown. You may then type a new name in the File name window:



- File name: Use the dropdown to select the file name you wish to use.
- Save as type: Use the dropdown to select the format for the download file you wish to save, e.g., .xml for XML; .csv for Text, Comma-Separated; .txt for Text, Tab-Separated.

When you have finished your selection, click on one of the following:

<p>Save</p>	<p>Click this button to save report results to your hard drive. When the Download Complete dialogue appears, click one of the following:</p> <ul style="list-style-type: none"> • Open opens the downloaded report on your hard drive. • Open Folder opens the folder where the report is stored on your hard drive.
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	<ul style="list-style-type: none"> • Close returns you to the Export Report Result screen.
Cancel	Click this button to return to the Export Report Result screen without saving your entries.

5.2.9 ARIES Statistical Analysis Report (STAR)

The ARIES Statistical Analysis Report (STAR) replaces the Ryan White Cross Titles Data Summary Report and serves as a general statistical report, displaying counts of your agency's clients based on a variety of demographic information.

The STAR report is available on the Client Reports menu.

Although HRSA does not require agencies to submit the STAR, many agencies will find it useful to have this comprehensive statistical report on hand. Some Administrative Agencies may begin using this report to monitor the agencies they administer, but it will not be necessary for those agencies to submit the STAR because AAs can run it directly as needed.

Notes

- The report has an Agency Enrollment Status filter based on the client's current enrollment status from the Agency Specifics screen (the filter is not based on the client's status at the end of your report's date range).
- The report displays results only for clients for whom [insurance start dates](#) are recorded.
- Some features of this report may or may not be available depending on your installation's configuration. Check with your System Administrator for additional information.

Accessing the Report

- To access the report, from the ARIES menu bar at the top of the ARIES screen, choose the **Report > Client** menu item to get to the Client Reports screen. Click the Statistical Analysis Report link, which takes you to the report's Parameters screen.

The STAR is a very flexible report, containing two full screens of customizable options. The Parameters screen determines the layout of the report (that is, which types of analyses are shown on the report), and the Filters screen determines which data is used to generate the report (which clients and services will be included). You must go through both of these screens in order to generate the report.

Owing to the complexity of the Parameters and Filters screens for the STAR, ARIES "remembers" your parameter and filter selections as long as you do not log out of ARIES. If you need to make minor adjustments to the parameters or filters after running and reviewing your report, simply return to the Client Reports page and click on the STAR link again. The parameters and filters you used for your last report will still be in place for your next report. However, once you log out of ARIES, you will need to start from scratch the next time you run the report.

Where filters have a "list box," you may make multiple selections by holding down the Ctrl key and clicking on the selections to be included. Administrative Agencies may run a consolidated report across all the agencies they serve by selecting their Administrative Agency from the dropdown and checking the "Aggregate Data" checkbox (which is visible only to Administrative Agency users).

Parameters Screen

The Parameters screen is the first screen you will see when you click on the report link.

ARIES Statistical Analysis Report (STAR) - Parameters

Unduplicated Client Counts (included on all reports)

- Total Clients Served
- New Clients Served
- Clients Served who Died during the Reporting Period
- Newly Diagnosed HIV

Basic Demographics

- Age
- Current Gender
- Sex at Birth
- Race/Ethnicity

Advanced Demographics

- County of Residence
- Geographic Area/HSDA
- Living Situation

Eligibility

- Household Poverty Level
- Insurance Level

Basic Medical

- HIV/AIDS Status
- HIV Exposure Categories

Medical History

- Most Recent CD4 Count
- Most Recent Viral Load Count

STI/Hepatitis

- STI/Hepatitis: Number of Clients Screened
- STI/Hepatitis: Number of Tests and Diagnoses

Tuberculosis

- Tuberculosis: Number of Clients Screened during the period

Click on the box to the left of each section title to indicate the sections you wish to include on the report.

The screen is broken down into the following sections:

<p>Unduplicated Client Counts</p>	<p>This section has no checkbox as it is automatically included on all reports and contains the following:</p> <p>Total Clients Served</p> <p>New Clients Served</p> <p>Clients Served Who Died during the Reporting</p> <p>'Total Clients Served' looks at distinct services received during the reporting period by clients who meet the filter requirements. 'New clients' are only those clients who did not have any services before the report Start Date. Finally, 'Clients Served Who Died during the Reporting Period' are only clients whose Date of Death is between the report Start and End Dates.</p>
<p>Basic Demographics</p>	<p>Age</p> <p>Current Gender</p> <p>Race/Ethnicity - User must select a Race/Ethnicity even if Basic Demographics is not included on the report. The selection is used to determine the values in the Client Race filter dropdown on the next screen.</p> <p>The Race/Ethnicity dropdown options include "Multi-Racial Clients" and "Include only Hispanic and Race 1."</p> <p>Note: If no selection is made, clicking Next will display an error message reading " A Race/Ethnicity methodology is required" at the top of the screen in red, with a red asterisk (*) next to the dropdown.</p>
<p>Advanced Demographics</p>	<p>County of Residence</p> <p>Geographic Area/HSDA</p> <p>Living Situation</p> <p>Note that Living Situation is split on the report page into RSR Housing Status categories and ARIES Living Situation subcategories. Clients can be counted in each sub-category. Category options are as follows:</p> <p>RSR Housing Status: Stable/Permanent</p> <ul style="list-style-type: none"> • Board care of assisted living • Participant-owned housing • Rental housing • Rented room <p>RSR Housing Status: Temporary</p> <ul style="list-style-type: none"> • Hospital or other medical facility • Jail/Prison

	<ul style="list-style-type: none"> • Living with relatives/friends • Psychiatric facility • Substance abuse treatment facility • Transitional housing <p>RSR Housing Status: Unstable</p> <ul style="list-style-type: none"> • Homeless from emergency shelter • Homeless from the streets <p>RSR Housing Status: Unknown</p> <ul style="list-style-type: none"> • Other • Refused to answer • Unknown
Eligibility	<p>Household Poverty Level</p> <p>Insurance Status</p> <p>Insurance start date must be before the reporting end date and the insurance end date must be on or after the report start date</p>
Basic Medical	<p>HIV/AIDS Status (Based on the Client's CDC Stage)</p> <p>HIV Exposure Categories (Based on the Client's Risk Factors)</p>

Medical History

- Most Recent CD4 Count
- Most Recent Viral Load Count

STI/Hepatitis

- STI/Hepatitis: Number of Clients Screened
- STI/Hepatitis: Number of Tests and Diagnoses

Tuberculosis

- Tuberculosis: Number of Clients Screened during the period
- Tuberculosis: Number of Clients Screened since HIV diagnosis
- Tuberculosis: Number of PPDs Placed, Read and Results
- Tuberculosis: Number of IGRAs and Results

Medications

- HAART Prescribed
- PCP Prophylaxis

Medical History	Most Recent CD4 Count Most Recent Viral Load Count
STI/Hepatitis	STI/Hepatitis: Number of Clients Screened STI/Hepatitis: Number of Tests and Diagnoses Clients who have a Syphilis, Hepatitis B, Hepatitis C, Genital Herpes, Gonorrhea, HPV, non-specific urethritis, Hepatitis A or Chlamydia record within the reporting period will be included in the STI/Hepatitis Screening category.
Tuberculosis	Tuberculosis: Number of Clients Screened during the period Tuberculosis: Number of Clients Screen since HIV diagnosis Tuberculosis: Number of PPDs Placed, Read, and Results Tuberculosis: Number of IGRAs and Results
Medications	HAART Prescribed PCP Prophylaxis

OB/GYN & Pregnancy

- PAP Smear
- Pregnancy

Screening


- Substance Abuse Screening
- Mental Health Screening
- Screening Summary


Services

• Service Summary:

Include Cost: Yes No
 Group By: Primary/Secondary Services

Next >
Cancel

OB/GYN & Pregnancy	PAP Smear Pregnancy
Screening	Substance Abuse Screening Mental Health Screening Screening Summary Please note that in the case of Substance Abuse Screening and Mental Health Screening, the report looks first for a Substance Abuse Screening Date and a Mental Health Screening Date. If there are no values for these items, the report will look at the SAMISS for an assessment screening and a referral to Mental Health or Substance Abuse follow up.
Services	Services Summary: Group By dropdown: Select either "Primary/Secondary Service" or "RSR Category" from the dropdown. "Primary/Secondary Service" is the default selection. Include Cost radio buttons: The default is "Yes."
	Click the Next button to save your input and proceed to the Filters screen.

	<p>Click the Cancel button to return to the Client Report menu without saving your entries.</p>
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Filters Screen

Clicking **Next** from the Parameters screen takes you to the Filters screen.

ARIES Statistical Analysis Report (STAR) - Filters

Service Date Between and

Agency or Administrative Agency

Funding Source
 Ryan White Part B
 Ryan White Part C
 Ryan White Part D

Contract
 Insurance 2013
 RA11-12
 RB21342

Program
 Ryan White
 CARE-HIPP
 HOPWA

Primary Service
 AIDS Pharmaceutical Assistance (local)
 Buddy/Companion Services
 Case Management (non-medical)

Client Age Between and

Current Gender
 Male
 Female
 Transgender MTF

WICY Clients ONLY

Client Race
 White
 Black
 Asian

Household Poverty Level Between and

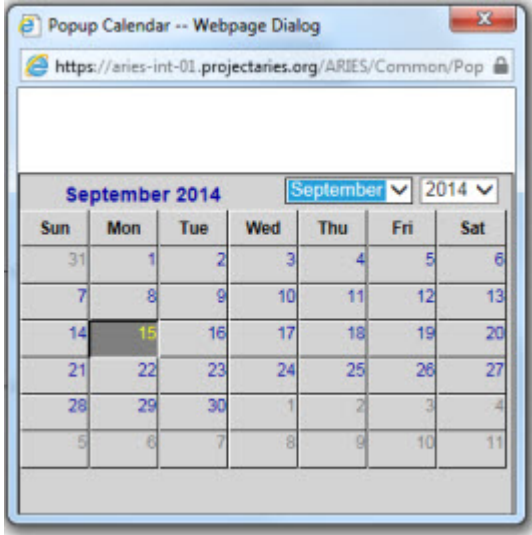
County
 Anderson
 Andrews
 Angelina

Geographic Area/HSDA
 4801-Amarillo
 4802-Midland/Odessa
 4803-Wichita Falls

Current Agency Enrollment Status
 Active
 Inactive
 Disenrolled




Display print format

Complete the fields as follows:

<p>Service Date Between fields</p>	<p>In the two "date" fields, enter the range of dates you wish to report on.</p> <p>Your report results will include results for clients who receive services from 12:00 AM on the first date to 11:59 PM on the second date. If a client registered with your agency has not received services, they are not counted.</p> <p>Use the format: MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>Agency or Administrative Agency</p>	<p>Use the dropdown to select which agency you wish to report on. Administrative agencies can report on any of their subagencies. If you are not an administrative agency, only your agency will display.</p>
<p>Funding Source</p>	<p><i>Optional.</i> All funding sources for the agency selected or for agencies managed by administrative agencies are listed.</p> <ul style="list-style-type: none"> From the list box, select All to include all funding sources in your report. <p>OR</p> <ul style="list-style-type: none"> If you wish to report on a specific funding source, make the appropriate selection from the list box. Or, to report on multiple funding sources (but not all), hold down the <CTRL> key and make the appropriate selections.
<p>Contract</p>	<p><i>Optional.</i> All contracts for the agency selected or for agencies managed by administrative agencies are listed.</p> <ul style="list-style-type: none"> From the list box, select All to include all contracts in your report.

	<p>OR</p> <ul style="list-style-type: none"> If you wish to report only on a specific contract, make the appropriate selection from the list box. Or, to report on multiple contracts (but not all), hold down the <CTRL> key and make the appropriate selections.
Program	<p><i>Optional.</i> All programs for the agency selected or for agencies managed by administrative agencies are listed, as defined in ARIES admin.</p> <ul style="list-style-type: none"> From the list box, select All to include all programs in your report. <p>OR</p> <ul style="list-style-type: none"> If you wish to report only on a specific program, make the appropriate selection from the list box. Or, to report on multiple programs (but not all), hold down the <CTRL> key and make the appropriate selections.
Primary Service	<p><i>Optional.</i> All primary services for the agency selected or for agencies managed by administrative agencies are listed, from the current Service Hierarchy.</p> <ul style="list-style-type: none"> From the list box, select All to include all primary services in your report. <p>OR</p> <ul style="list-style-type: none"> If you wish to report only on a specific primary service, make the appropriate selection from the list box. Or, to report on multiple primary services (but not all), hold down the <CTRL> key and make the appropriate selections.
Client Age Between fields	<p><i>Optional.</i> In the two "age" fields, enter the range of ages you wish to report on.</p> <p>If you wish to report on all ages, leave the two fields blank.</p>
Current Gender	Shows the breakdown of client counts by current gender. "Other" and "Refused" are counted as "Unknown."
WICY Clients Only	Check this box to report exclusively on clients in the Women, Infants, Children and Youth program. Selecting this checkbox will deactivate the Client Age Between and Current Gender filters above it. Deselecting this checkbox will re-activate those two filters.
Client Race	<p>This is a required field. A warning displays if no selection is made. Options in this list box depend on the Race/Ethnicity methodology selected on the Parameters screen.</p> <p>If "Include Multi-Racial Clients" was selected, the RSR race/ethnicity calculations are used, and the options in the list box are:</p> <p>White</p>

	<p>Black</p> <p>Hispanic</p> <p>Asian</p> <p>Native Hawaiian / Pacific Islander</p> <p>American Indian or Alaskan Native</p> <p>More than one race</p> <p>Unknown</p> <p>If "Include only Hispanic and Race 1" was selected as the methodology, the "More than one race" option is not included, and the race/ethnicity calculations are based only on the Hispanic and Race 1 data elements ("Yes" for Hispanic trumps Race 1).</p> <ul style="list-style-type: none"> From the list box, select All to include all client races in your report. <p>OR</p> <ul style="list-style-type: none"> If you wish to report only on a specific client race, make the appropriate selection from the list box. Or, to report on multiple client races (but not all), hold down the <CTRL> key and make the appropriate selections.
Household Poverty Level Between fields	<p>Optional. In the two "household poverty level between" fields, enter the range of poverty levels you wish to report on.</p> <p>If you wish to report on all poverty levels, leave the two fields blank.</p>
County	<ul style="list-style-type: none"> <i>Optional.</i> From the list box, select All to include all counties in your report <p>OR</p> <ul style="list-style-type: none"> If you wish to report only on a specific county, make the appropriate selection from the list box. Or, to report on multiple counties (but not all), hold down the <CTRL> key and make the appropriate selections.
Geographic Area/HSDA	<ul style="list-style-type: none"> <i>Optional.</i> From the list box, select All to include all geographic areas/HSDAs in your report. <p>OR</p> <ul style="list-style-type: none"> If you wish to report only on a specific geographic area/HSDA, make the appropriate selection from the list box. Or, to report on multiple geographic areas/HSDAs (but not all), hold down the <CTRL> key and make the appropriate selections.
Current Agency Enrollment Status	<ul style="list-style-type: none"> From the list box, select All to include all current agency enrollment statuses in your report. <p>OR</p> <ul style="list-style-type: none"> If you wish to report only on a specific current agency enrollment status, make the appropriate selection from the

	list box. Or, to report on multiple current agency enrollment statuses (but not all), hold down the <CTRL> key and make the appropriate selections.
Display print format checkbox	Select this checkbox to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.
	Click the Report > button to generate the report results.
	Clicking this button allows you to export the report results as a data file. The next screen gives you three options for the format of the data file: XML, Text comma-separated (CSV), or Text tab-separated. After you select a format and click Export , the data file will be created. You may save the file to your computer when the Download button appears.
	Click the Cancel button to return to the Client Reports menu without saving the report.

Report Results

Clicking on the **Report >** button on the Filters screen displays the report results.

ARIES Statistical Analysis Report (STAR) - Results		
Shasta Services		
Reporting period: 05/01/2013 to 05/24/2014		
Unduplicated number of clients served:	14	
Unduplicated number of new clients served:	3	21.43%
Client Served Who Died during the Reporting Period:	0	0.00%
Age	Number of Clients	% of Total
Client's age as of the end of the reporting period		
Less than 2 years	0	0.00%
02 - 12 years	0	0.00%
13 - 24 years	3	21.43%
25 - 44 years	6	42.86%
45 - 64 years	4	28.57%
65 years or older	1	7.14%
Total	14	100.00%
Current Gender	Number of Clients	% of Total
Other and *Refused* are counted as *Unknown*		
Female	7	50.00%
Male	7	50.00%
Transgender FTM	0	0.00%
Transgender MTF	0	0.00%
Unknown	0	0.00%
Total	14	100.00%

The name of the agency and the reporting dates appear at the top of the screen.

The report tables display the breakdown of client numbers, depending upon your selected parameters. Unless noted, all tables show all possible data values, with zeros on rows where no records exist. Tables that are based on a dropdown will list the data values in the same order as the dropdown.

Unduplicated number of clients served	Shows the number and percentage of unique clients who received at least one service within the reporting period.
Unduplicated number of new clients served	Shows the number and percentage of new clients whose first service was within the reporting period.
Clients Served Who Died during the Reporting period	Shows the number and percentage of unique clients with a Date of Death within the reporting period.
Age	Shows the breakdown of client counts by age as of the end of reporting and is the same as the RSR Summary Report.
Current Gender	Shows the breakdown of client counts by current gender. "Other" and "Refused" are counted as "Unknown."

Race/Ethnicity	Number of Clients	% of Total
Includes Only Hispanic and Race 1		
White	1	7.14%
Black	0	0.00%
Hispanic	5	35.71%
Asian	0	0.00%
Native Hawaiian/Pacific Islander	1	7.14%
American Indian or Alaskan Native	1	7.14%
Unknown	6	42.86%
Total	14	100.00%

Race/Ethnicity Includes Multi-Racial Clients	Shows the breakdown of client counts by Race/Ethnicity. Only one of these two race/ethnicity tables appears, based on the race/ethnicity methodology selected on the Parameters screen.
Race/Ethnicity Includes Only Hispanic and Race 1	Shows the breakdown of client counts by Race/Ethnicity. Only one of these two race/ethnicity tables appears, based on the race/ethnicity methodology selected on the Parameters screen.

County of Residence	Number of Clients	% of Total
Client's county of residence as of the end of the reporting period		
Andrews	1	7.14%
Harris	1	7.14%
Lamar	2	14.29%
Lubbock	2	14.29%
Unknown	4	28.57%
Zavala	4	28.57%
Total	14	100.00%

Geographic Area/HSDA	Number of Clients	% of Total
Client's geographic area of HSDA as of the end of the reporting period		
4809-Lubbock	2	14.29%
4816-Houston	1	7.14%
4821-Brownsville/Harlingen	2	14.29%
4826-Fort Worth	4	28.57%
Unknown	5	35.71%
Total	14	100.00%

<p>County of Residence</p>	<p>Shows the breakdown of client counts by county of residence, based on the most recent address history record (type = "Residence") within or prior to reporting period, and the total.</p> <p>If the Show Counties Yes radio button is selected, counties with a zero count will be displayed, in addition to counties with a non-zero count.</p> <p>The report lists only the values that exist in the data (and not all possible values for County).</p>
<p>Geographic Area/HSDA</p>	<p>Shows the breakdown of client counts by geographic area/HSDA, based on the most recent address history record (type = "Residence") within or prior to reporting period.</p> <p>If the Show Geographic Area/HSDA? No radio button is selected, this breakdown will not be shown.</p> <p>The report lists only the values that exist in the data (and not all possible values for HRSA).</p>

ARIES Living Situation			Number of Clients	% of Total	RSR Housing Status	Number of Clients	% of Total
Client's living situation as of the end of the reporting period							
Board care or assisted living	1	7.14%	Stable/Permanent	4	28.57%		
Participant-owned housing	0	0.00%					
Rental housing	1	7.14%					
Rented room	2	14.29%					
Total	14	100.00%					
Hospital or other medical facility	0	0.00%	Temporary	1	7.14%		
Jail/Prison	1	7.14%					
Living with relatives/friends	0	0.00%					
Psychiatric facility	0	0.00%					
Substance abuse treatment facility	0	0.00%					
Transitional housing	0	0.00%					
Total	14	100.00%					
Homeless from emergency shelter	2	14.29%				Unstable	2
Homeless from the streets	0	0.00%					
Total	14	100.00%					
Other	0	0.00%	Unknown	7	50.00%		
Refused to answer	0	0.00%					
Unknown	6	42.86%					
Total	14	100.00%					

Household Poverty Level		Number of Clients	% of Total
Client's percentage of federal poverty level based on household income and size			
0 - 100	6	42.86%	
101 - 200	0	0.00%	
201 - 300	0	0.00%	
301 - 400	0	0.00%	
401 - 500	0	0.00%	
501 and above	0	0.00%	
Unknown	8	57.14%	
Total	14	100.00%	

<p>ARIES Living Situation</p>	<p>Shows the breakdown of client counts by four categories of living situations and RSR Housing Status as of the end of reporting period, and the total.</p> <p>The report is based on the most recent Living Situation record within or prior to the reporting period.</p>
<p>Household Poverty Level</p>	<p>Shows the breakdown of client counts by Household Poverty Level ranges based on household income and size, and the total. Shows values for all poverty levels.</p>

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Insurance Status	Number of Clients	% of Total
Client's insurance status at any time within the reporting period. Sum of percents may exceed 100% as some clients may fall into multiple categories during the reporting period.		
Private	0	0.00%
Medicare	0	0.00%
Medicaid	0	0.00%
Other public	0	0.00%
No insurance	0	0.00%
Other	0	0.00%
Unknown	1	100.00%
Total	1	100.00%

HIV Status	Number of Clients	% of Total
Client's HIV/AIDS status based on CDC Disease Stage, lowest CD4 test, AIDS Date or AIDS Defining Condition		
HIV-negative	0	0.00%
HIV-positive, asymptomatic	1	100.00%
HIV-positive, not AIDS	0	0.00%
HIV-positive, disabling	0	0.00%
HIV-positive, AIDS status unknown	0	0.00%
CDC-defined AIDS	0	0.00%
Disabling AIDS	0	0.00%
Pediatric, HIV-indeterminate (infants only)	0	0.00%
Pediatric, confirmed HIV-positive (infants only)	0	0.00%
Unreported	0	0.00%
Unknown	0	0.00%
Total	1	100.00%

Insurance Status	Shows the breakdown of client counts by Insurance Status and the total at any time within the reporting period and is the same as the RSR Summary Report. Since a client may have multiple insurance types within the reporting period, the sum of percents may exceed 100 percent. Shows values for all insurance statuses.
HIV/AIDS Status	Shows the breakdown of client counts by HIV/AIDS Status and the total. These are the same calculations as the RSR report but show "Pediatric confirmed HIV-positive" separately. Shows all status values.

HIV Exposure	Number of Clients	% of Total
Client's HIV exposure category based on CDC hierarchy, each client reported in only one category		
Men who have sex with men (MSM)	0	0.00%
Injection drug user (IDU)	0	0.00%
Men who have sex with men and injection drug user (MSM & IDU)	0	0.00%
Hemophilia/coagulation disorder	0	0.00%
Heterosexual contact	0	0.00%
Receipt of blood transfusion, blood component, or tissue	0	0.00%
Mother with/at risk for HIV infection (perinatal transmission)	0	0.00%
Other	0	0.00%
Unknown	1	100.00%
Total	1	100.00%

Newly Diagnosed HIV/AIDS	Number of Clients	% of Total
Number of clients newly diagnosed during the reporting period		
Newly Diagnosed HIV Clients	0	0.00%
Newly Diagnosed HIV/AIDS	0	0.00%
Total	0	0.00%

Most Recent CD4 Count	Number of Clients	% of Total
Client's most recent CD4 Count within the reporting period		
0 - 49	0	0.00%
50 - 99	0	0.00%
100 - 199	0	0.00%
200 - 349	0	0.00%
350 - 499	0	0.00%
500 - 749	0	0.00%
750 and above	0	0.00%
No CD4 test within the reporting period	1	100.00%
Total	1	100.00%

HIV Exposure Categories	Shows the breakdown of client accounts by HIV Exposure Categories and the total. This is the same calculations as the RDR but shows client in only one risk category based on hierarchy. The report shows clients separately who have both MSM and IDU. Shows all categories values.
Newly Diagnosed HIV/AIDS	Shows the breakdown of client accounts by Newly Diagnosed HIV and AIDS categories during the reporting period, and the total.
Most Recent CD4 Count	Shows the breakdown of client counts by the most recent CD4 count within the reporting period. Shows all ranges.

Most Recent Viral Load Count	Number of Clients	% of Total
Client's most recent Viral Load Count within the reporting period.		
0 - 50	2	2.04%
51 - 100	0	0.00%
101 - 500	4	4.08%
501 - 10,000	3	3.06%
10,001 - 50,000	35	35.71%
50,001 - 100,000	3	3.06%
100,001 - 500,000	12	12.24%
500,001 and above	5	5.10%
No viral load test within the reporting period	34	34.69%

STI/Hepatitis Screening	Yes	% of Total	No	% of Total	NMI	% of Total
All STI/Hepatitis tests performed on clients who were screened during the reporting period, distributed by diagnosis						
Genital Herpes	0	0.00%	1	100.00%	0	0.00%
Gonorrhea	0	0.00%	1	100.00%	0	0.00%
Human Papilloma Virus	0	0.00%	1	100.00%	0	0.00%
Syphilis	0	0.00%	1	100.00%	0	0.00%
Hepatitis A	0	0.00%	1	100.00%	0	0.00%
Hepatitis B	0	0.00%	1	100.00%	0	0.00%
Hepatitis C	0	0.00%	1	100.00%	0	0.00%
Chlamydia	0	0.00%	1	100.00%	0	0.00%
Non-specific urethritis	0	0.00%	1	100.00%	0	0.00%
Total	0	0.00%			0	0.00%

Most Recent Viral Load Count	Shows the breakdown of client accounts by the most recent viral load count within the reporting period. Shows all ranges.
STI/Hepatitis Screening	<p>Shows the breakdown of client counts by STI/Hepatitis tests performed on clients who were screened during the reporting period (Yes, No, and NMI (Not Medically Indicated)). This table counts clients.</p> <p>For each client, if a record exists within the reporting period where NMI is "No," the client is counted in the "Yes" column. If the most recent record within or prior to the reporting period has "Yes" for NMI, the client is counted in the "NMI" column. Otherwise, the client is counted in the "No" column.</p>

STI/Hepatitis Tests	Number of Tests	Negative	Positive	Presumptive	Indeterminate	Unknown
All STI/Hepatitis tests performed on clients who were screened during the reporting period, distributed by diagnosis						
Genital Herpes	0	0	0	0	0	0
Gonorrhea	0	0	0	0	0	0
Human Papilloma Virus	0	0	0	0	0	0
Syphilis	0	0	0	0	0	0
Hepatitis A	0	0	0	0	0	0
Hepatitis B	0	0	0	0	0	0
Hepatitis C	0	0	0	0	0	0
Chlamydia	0	0	0	0	0	0
Non-specific urethritis	0	0	0	0	0	0
Total	0	0	0	0	0	0

Tuberculosis Screening during the period	Number of Clients	% of Total
Was the client screened for Tuberculosis during the reporting period		
Yes	0	0.00%
No	0	0.00%
Not medically indicated	0	0.00%
Unknown	1	100.00%
Total	1	100.00%

Tuberculosis Screening since HIV Diagnosis	Number of Clients	% of Total
If not screened during the reporting period, was the client screened for Tuberculosis since HIV diagnosis		
Yes	0	
No	0	
Not medically indicated	0	
Unknown	0	
Total	0	

STI/Hepatitis Tests	Shows the breakdown of all types of STI/Hepatitis tests performed on clients who were screened during the reporting period, distributed by Diagnoses (excludes Not Medically Indicated records), and the total. This table counts records (number of tests), <i>not</i> clients.
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Tuberculosis Screening during the period	Shows the breakdown of client counts who were screened for Tuberculosis during the reporting period, and the total, and is the same as the RSR Summary Report. Shows all values.
Tuberculosis Screening Since HIV Diagnosis	If not screened during the reporting period, shows the breakdown of client counts who were screened for Tuberculosis since the HIV diagnosis, and the total, and is the same as the RSR Summary Report. Shows all values.

Tuberculosis PPDs and Results	Number of Clients	% of Total
Number of PPDs placed, number of PPDs read, number of PPDs not read and Results (only for PPDs read)		
Number of PPDs placed	0	0.00%
-- Number of PPDs not read	0	0.00%
-- Number of PPDs read	0	0.00%
-- Reactive results	0	0.00%
-- Non-reactive results	0	0.00%
-- Unknown results	0	0.00%
Tuberculosis IGRAs and Results		
Number of IGRAs and Results		
Number of IGRAs	0	0.00%
-- Positive results	0	0.00%
-- Negative results	0	0.00%
-- Unknown results	0	0.00%
HAART Prescribed		
Was the client prescribed Highly Active Anti-Retroviral Therapy during the reporting period		
Yes	0	0.00%
No, not medically indicated	0	0.00%
No, not ready (as determined by clinician)	0	0.00%
No, client refused	0	0.00%
No, intolerance, side-effect, toxicity	0	0.00%
No, HAART payment assistance unavailable	0	0.00%
No, other reason	0	0.00%
Unknown	1	100.00%
Total	1	100.00%

Tuberculosis PPDs and Results	Shows the breakdown of client counts by number of PPDs placed (the Not Read/Read rows) , number of PPDs read, and results (only for PPDs read). Shows all values. This table counts tests, but since PPDs are not longitudinal, it effectively counts clients.
Tuberculosis IGRAs and Results	Shows the breakdown of client counts by TB IGRAs and Results (number of IGRAs). Shows all values. This table counts tests, but since IGRAs are not longitudinal, it effectively counts clients.
HAART Prescribed	Shows the breakdown of client counts by Highly Active Anti-Retroviral Therapy (HAART) prescribed during the reporting period, and the total, and is the same as the RSR Summary Report. Shows all values.

PCP Prophylaxis	Number of Clients	% of Total
Was the client prescribed PCP Prophylaxis during the reporting period		
Yes	0	0.00%
No	1	100.00%
Total	1	100.00%

PAP Smears	Number of Clients	% of Total
Number of HIV+ women and Transgender FTM and MTF who received a PAP Smear during the reporting period		
Yes	0	0.00%
No	1	100.00%
Not medically indicated	0	0.00%
Total	1	100.00%

Pregnancy	Number of Clients	% of Total
Number of HIV+ women and Transgender FTM who were pregnant at any time during the reporting period		
Yes	0	0.00%
No	1	100.00%
Total	1	100.00%

PCP Prophylaxis	<p>Shows the breakdown of client counts by PCP Prophylaxis prescribed during the reporting period, and the total, and is the same as the RSR Summary Report. Shows all values.</p> <p>If the client has an Other Medications record that meets the PCP Prophylaxis definition, the client is reported as a Yes; all others are No.</p>
PAP Smears	<p>Shows the breakdown of client counts by the number of HIV+ women and Transgender FTM and MTF receiving a PAP Smear during the reporting period, and the total, and is the same as the RSR Summary Report. Shows all values.</p> <p>The denominator and percentages in the Total row are based on the populations noted above.</p>
Pregnancy	<p>Shows the breakdown of client counts by the number of HIV+ women and Transgender FTM who were pregnant at any time during the reporting period, and the total, and is the same as the RSR Summary Report. Shows all values.</p> <p>The denominator and percentages in the Total row are based on the populations noted above.</p>

Substance Abuse Screening		Number of Clients	% of Total
Number of clients screened for Substance Abuse during the reporting period			
Yes		0	0.00%
No		1	100.00%
Total		1	100.00%

Mental Health Screening		Number of Clients	% of Total
Number of clients screened for Mental Health during the reporting period			
Yes		0	0.00%
No		1	100.00%
Total		1	100.00%

Screening Summary	During Reporting Period		Since HIV Diagnosis		Never Screened	
	Number of Clients	% of Total	Number of Clients	% of Total	Number of Clients	% of Total
Number of clients screened during the reporting period, screened since HIV diagnosis if not screened during the reporting period, and never screened						
Risk Reduction	0	0.00%	0	0.00%	1	100.00%
Substance Abuse	0	0.00%	0	0.00%	1	100.00%
Mental Health	0	0.00%	0	0.00%	1	100.00%
SAMSS	0	0.00%	0	0.00%	1	100.00%
Tuberculosis	0	0.00%	0	0.00%	1	100.00%
Syphilis	0	0.00%	0	0.00%	1	100.00%
Hepatitis B	0	0.00%	0	0.00%	1	100.00%
Hepatitis C	0	0.00%	0	0.00%	1	100.00%
PAP Smear	0	0.00%	0	0.00%	1	100.00%

Substance Abuse Screening	Shows the breakdown of client counts by the number of clients screened for Substance Abuse during the reporting period, and the total, and is the same as the RSR Summary Report. Shows all values.
Mental Health Screening	Shows the breakdown of client counts by the number of clients screened for Mental Health during the reporting period, and the total, and is the same as the RSR Summary Report. Shows all values.
Screening Summary	Shows the breakdown of client counts by the number of clients screened during the reporting period, since HIV diagnosis, and never screened. It is the same methodology as the RSR Summary Report, but counts only clients with a "Yes" result.

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Service Summary: Primary/Secondary Service	UDC	% Total	UOS	Cost
Number of clients served (UDC) and total number of units (UOS) grouped by Primary/Secondary service				
AIDS Pharmaceutical Assistance (local) / Medication	3	3.06%	12.00	\$625.00
Case Management (non-medical) / ADAP Enrollment Assistance	2	2.04%	2.00	\$48.00
Case Management (non-medical) / Home or Field Visit	1	1.02%	1.00	\$12.00
Child Care Services / Child Care Services	3	3.06%	3.00	\$42.00
Child Welfare Services / Medi-Cal Supplements for Infants/Children	1	1.02%	5.00	\$0.00
Early Intervention Services (Parts A and B) / Early Intervention Services (Parts A and B)	2	2.04%	2.00	\$100.00
Emergency Financial Assistance / Emergency Financial Assistance	1	1.02%	1.00	\$150.00
Emergency Financial Assistance / Utilities	1	1.02%	1.00	\$80.00
Food Bank/Home-Delivered Meals / Congregate Meals (i.e., soup kitchen)	2	2.04%	2.00	\$98.00
Food Bank/Home-Delivered Meals / Food Pantry/Bank	1	1.02%	1.00	\$11.00
Food Bank/Home-Delivered Meals / Home-Delivered Meals	1	1.02%	1.00	\$14.00
Food Bank/Home-Delivered Meals / Vouchers	1	1.02%	1.00	\$88.00
Health Education/Risk Reduction / Group Counseling	1	1.02%	1.00	\$8.00
Health Education/Risk Reduction / Health Education/Risk Reduction	1	1.02%	1.00	\$15.00
Health Education/Risk Reduction / Safer Sex	1	1.02%	1.00	\$28.00
Health Insurance Premium / Co-Payment	16	16.33%	22.00	\$2,102.13
Health Insurance Premium / Co-Payment	1	1.02%	6.00	\$1,500.00
Health Insurance Premium / Co-Payment	1	1.02%	13.00	\$3,047.26
Rehabilitation Services / Occupational Therapy	1	1.02%	1.00	\$0.00
Substance Abuse Services - Residential / Substance Abuse Services - Residential	1	1.02%	1.00	\$0.00
Supportive Services / Adult Day Care, Personal Assistance	1	1.02%	5.00	\$0.00
Supportive Services / Child Care and Other Children Services	1	1.02%	5.00	\$25.00
Supportive Services / Life Skills Management	1	1.02%	1.00	\$0.00
Supportive Services / Meals, Nutritional Services	1	1.02%	1.00	\$4.00
Supportive Services / Mental Health Services	1	1.02%	1.00	\$30.00
Supportive Services / Other Activity	6	6.12%	12.00	\$831.00
Treatment Adherence Counseling / Home or Field Visit	1	1.02%	1.00	\$0.00
Treatment Adherence Counseling / Individual Counseling (Face-to-Face)	1	1.02%	1.00	\$0.00
Total:	98	100.00%	451.81	\$35,445.90

Criteria: date range between 7/1/2012 12:00:00 AM and 6/30/2013 12:00:00 AM; for Agency: Shasta Test Services
 This report was based on data generated at 6/3/2014 12:07:19 AM.

<p>Service Summary: Primary/Secondary Service</p>	<p>Shows number of clients served (UDC = unduplicated clients) and total number of units (UOS) grouped by RSR category.</p> <p>Only one of the Service tables will appear, depending on Group By selected on the Parameters screen.</p> <p>If grouped by RSR category, all RSR categories will be shown, and will be listed in the order shown on the RSR Summary Report. The Cost column appears only if the Include Cost option was set to "Yes" on the Parameters page.</p> <p>Note: When grouping by RSR category, an "Unknown (blank)" row is required since RSR Category can be blank.</p> <p>Below the table is the date and time the report was generated, with report criteria.</p>
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5.3 Services Reports

The Services reports screen displays reports that are associated with services for clients. For example, you can generate mailing labels for sending reminders to clients for upcoming services.

Services Reports

[Mailing Labels](#)

Displays client name, address, city, state, Zip, anonymous, and whether to send mail with filters on clientID, Program, Date of Service, Agency Status, and Gender

If you are an ARIES administrator and you want to change the order in which the reports are listed, click the Display Order button at the bottom of the screen, which takes you to the [Change Display Order](#) screen.

The Services Report screen includes:

- [Mailing Labels](#)

Note: The filter values on most ARIES reports include a date range requirement. Be aware that the wider the date range, the more information your report will contain; and the longer the time required to generate it.

5.3.1 Mailing Labels

The Mailing Labels Report allows you to search out clients by program, agency status, gender, and date of service and it outputs a report including client name and mailing address. This can be useful in sending out reminders or notices.

To print out mailing labels, export the report into an application where you can format the labels properly like Microsoft Word or Access.

To access the report, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Report > Services** menu item to access the Services Reports screen.
- Click the "Mailing Labels" link.

Report Filter Values

Report Filter Values

Mailing Labels

Client ID &

Program
 All
 CMP
 EIP
 CARE/HIPP
 CARE Services
 MCWP

Date of Service Between &

Status
 All
 Active
 Inactive
 Disenrolled
 Lost to Follow-Up
 Discharged

Gender
 All
 Female
 Male
 Transgender FTM
 Transgender MTF
 Other

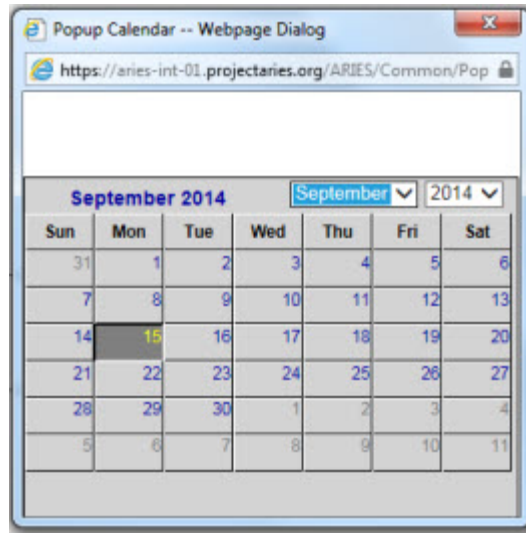
Display **results** Display print format

Clicking on the link brings up the filter screen where you can define the parameters of your report.

Complete the fields as follows:

Client ID	<p>From the dropdown list, select the Client ID filter.</p> <p>Client ID <input type="text"/></p> <div style="border: 1px solid black; padding: 2px; width: fit-content;"> Equals Before After Between Like Is Null Is Not Null </div> <p>Filters:</p>
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	<p><u>To filter for a specific client ID</u>: Select "Equals" from the dropdown list and enter the client ID in the first text field.</p> <p><u>To filter for client IDs before a given ID</u>: Select "Before" from the dropdown list to sort through all entries before - but not including - a specific ID. Leave the second text field empty.</p> <p><u>To filter for client IDs after a given ID</u>: Select "After" from the dropdown list and enter a specific ID to filter for records after that ID. Leave the second text field empty.</p> <p><u>To filter for a range of partial client IDs</u>: Select "Between" from the dropdown list and enter the client ID range you wish to report on. Example: To search records for client whose IDs start with numbers between 11 to 14, enter "11" and "14" in the two text fields. ARIES searches all client IDs starting with 11 up to, but not including, 14.</p> <p><u>To filter through all records with no client IDs entered</u>: Select "Is Null" from the dropdown list to sort through all records that have no client IDs entered. Leave the text fields empty. This can be used to search for any clients who have not yet been assigned an ID number.</p> <p><u>To filter through all records with client IDs</u>: Select "Is Not Null" from the dropdown list to include only the clients who have been assigned an ID number. Leave the text fields empty.</p> <p><u>To skip this filter</u>, select the blank option from the dropdown list. Since there is no filter, all records will be included in results.</p>
<p>Program list box</p>	<p>In the list box, select the programs from which the client is receiving services that you wish to report on.</p> <p><u>To filter for a specific program</u>: Select the specific program from the list box.</p> <p><u>To filter through multiple programs</u>: Hold down the Control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, if you wanted to report on the clients who were receiving services from HOPWA and CARE Services, click each selection while holding down the Control key and each will be highlighted.</p> <p><u>To include all programs</u>: Select All.</p>
<p>Date of Service</p>	<p>The Date of Service filter allows you to report on clients scheduled to receive services over a specific time period.</p> <p>From the dropdown list, select the date of service filter. To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.</p>



Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Filters:

To filter for clients receiving services **on a given date**: Select "**On**" from the dropdown list and enter a date in the first text field to filter for clients whose service was received on a given day. Example: If you wanted to search for all clients who received services on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for service dates **before a given date**: Select "**Before**" from the dropdown list to filter for clients who received services before a given day. This will sort through all entries before, but not including, a specific date. Example: If you wanted to search for all clients who received services before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.



To filter for service dates **after a given date**: Select "**After**" from the dropdown list and enter a specific date to filter for clients who received services after a given day. Example: If you wanted to search for all clients who received services after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.

To filter for service dates **within a range of dates**: Select "**Between**" from the dropdown list to filter for clients who received services between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all records from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.

To filter through **all services with no date**: Select "**Is Null**" from the dropdown list to sort through all records that have no service date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.

	<p>To filter through all services with a date: Select "Is Not Null" from the dropdown list to sort through all records that have a service date. Leave the text fields empty.</p> <p>To search all services: Select the blank option from the dropdown and leave the text fields empty.</p>
Status list box	<p>In the list box, select which client status type you wish to report on, e.g., All, Active, Inactive, Disenrolled, Lost to Follow-up, Discharged.</p> <p>To filter for a specific status type: Select the specific status type from the list box.</p> <p>To filter through multiple status types: Hold down the Control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, if you wanted to report on the clients who were inactive, discharged, or disenrolled, click each selection while holding down the Control key and each will be highlighted.</p> <p>To include all status types: Select All.</p>
Gender list box	<p>In the list box, select which gender you wish to report on.</p> <p>To filter for a specific gender type: Select the specific gender type from the list box.</p> <p>To filter through multiple gender types: Hold down the Control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, if you wanted to send letters to all genetically female clients, hold the Control key down and click "Female" and "Transgender F TM" and each will be highlighted.</p> <p>To include all gender types: Select All.</p>
Display	<p>The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.</p>
Display	<p>Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.</p>

After completing your filter selections:

	Click this button to display the report results.
	Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

Report Results

Mailing Labels								
Last Name	First Name	street1	street2	City	State	ZIP	Anon	Mail
9000	Hal	1111 First St		Sacramento	CA	95831	No	No
Arouet	Francois	200 High School Dr		San Augustine	TX	75972	Yes	No
Awe	Andxx	PO Box #24680		Backwater	CA	91119	Yes	No
Birsa	Rhonda	333 3rd Street	Apartment 12A	West Palm Beach	FL	33401	Yes	Yes
Client	Sample	1234 Any Street		Any Town	CA	91355	Yes	Yes
Dolittle	Eliza	111 Mulbury Place		London	CA	90000	Yes	Yes
Duck	Donald	123 Feather Lane		Billings	MT	58725	Yes	No
Fuentes	Elena	4500 W. Davis St,		New Braunfels	TX	78130	Yes	Yes
Kroll	Herman	555 N. Mart		Mart	TX	55555	Yes	No
Metcalfe	Daria	123 Anywhere Street		El Paso	TX	79902	No	Yes
Porter	Kim	5309 Wall St		La Jolla	CA	92037	No	Yes
Schmo	Joe	1234 Richmond Way		Richmond	CA	94805	Yes	No
Summers	Donna	203 W Nueva		San Antonio	TX	78210	Yes	No
Zztest	Patient	1725 W. 17th Street		Santa Ana	CA	92706	Yes	Yes

14 records, generated 6/20/2011 3:09:24 PM
 Criteria: Agency Client ID 1 BETWEEN 'D' AND 'M' OR agencyClientID2 BETWEEN 'D' AND 'M' AND Program Assigned IN ('CARE/HIPP') AND Service Line Item Service Date BETWEEN '1/1/2010' AND '3/31/2011'

[Export](#)

The report results display in a table alphabetized in ascending order by client last name. From left to right the table lists the client last name, client first name, and their mailing address (street address, city, state and zip code).

Anon column

- If the client lists "Yes" in the Anon column, this means that all mail should be delivered in an envelope that does not list the agency name.
- If the client lists "No" in the Anon column, it is OK for the mail to be delivered in an envelope that lists the agency name.

Mail column

- If the client lists "No" in the Mail column, do not send them mail.
- If the client lists "Yes" in the Mail column, it is OK to send them mail.
- Clicking the client's first or last name takes you to their contact info screen.

The bottom of the table displays the number of records and the time and date of the report display, as well as the filters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.4 Finance Reports

The Finance reports screen contains reports pertaining to budgeting and financial information. For example, you can generate a report on services spending for an individual contract.

<p>Financial</p>	<p>Finance Reports</p> <p>For each contract and service category, displays budgeted amount, amount spent, amount remaining, and percent remaining with filters on Contract, Service Category, and Service Date</p>
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If you are an ARIES administrator and you want to change the order in which the reports are listed, click the Display Order button at the bottom of the screen, which takes you to the [Change Display Order](#) screen.

The Finance Reports screen includes:

- [Financial](#)

Note: The filter values on most ARIES reports include a date range requirement. Be aware that the wider the date range, the more information your report will contain; and the longer the time required to generate it.

5.4.1 Financial

The Financial Report allows you to report on your agency's contract usage. You can filter your results by contract name, service type, and service dates. For example you can report on how much in Medicare services your agency administered in a given quarter.

- To access the report, from the [ARIES menu bar](#) at the top of the ARIES screen, choose the **Report > Finance** menu item to get to the [Finance Reports](#) screen. Click the "Financial" link.

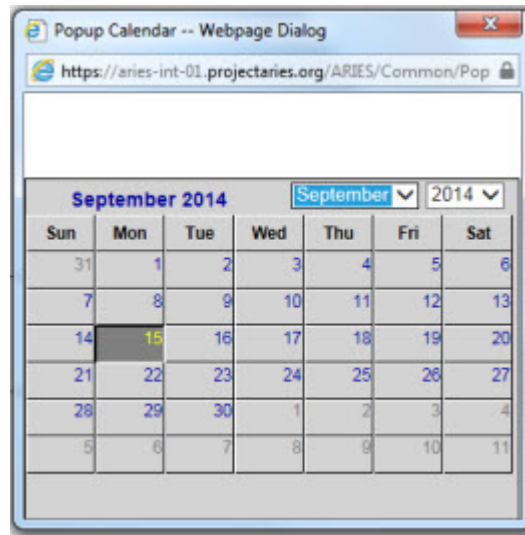
Report Filter Values

Clicking on the link brings up the filter screen where you can define the parameters of your report.

Complete the fields as follows:

<p>Contract list box</p>	<p>In the list box, select the contract that you wish to report on.</p> <p>To filter for a specific contract: Select the specific program from the list box.</p> <p>To filter through multiple contracts: Hold down the Control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, if you wanted to report on your HOPWA2011 and RWA11 contracts, click each selection while holding down the Control key and each will be highlighted.</p> <p>To include all contracts: Select All.</p>
<p>Service list box</p>	<p>In the list box, select the service that you wish to report on.</p> <p>To filter for a specific service: Select the specific program from the list box.</p> <p>To filter through multiple services: Hold down the Control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, if you wanted to report on Infectious Diseases and Dermatology, click each selection while holding down the Control key and each will be highlighted.</p> <p>To include all services: Select All.</p>
<p>Service Date</p>	<p>The Service Date filter allows you to report on clients scheduled to receive services over a specific time period.</p>

From the dropdown list, select the date of service filter. To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.



Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Filters:

To filter for clients receiving services **on a given date**: Select "**On**" from the dropdown list and enter a date in the first text field to filter for clients whose service was received on a given day. Example: If you wanted to search for all clients who received services on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.



To filter for service dates **before a given date**: Select "**Before**" from the dropdown list to filter for clients who received services before a given day. This will sort through all entries before, but not including, a specific date. Example: If you wanted to search for all clients who received services before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for service dates **after a given date**: Select "**After**" from the dropdown list and enter a specific date to filter for clients who received services after a given day. Example: If you wanted to search for all clients who received services after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.


To filter for service dates **within a range of dates**: Select "**Between**" from the dropdown list to filter for clients who received services between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all records from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.

	<p><u>To filter through all services with no date</u>: Select "Is Null" from the dropdown list to sort through all records that have no service date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.</p> <p><u>To filter through all services with a date</u>: Select "Is Not Null" from the dropdown list to sort through all records that have a service date. Leave the text fields empty.</p> <p><u>To search all services</u>: Select the blank option from the dropdown and leave the text fields empty.</p>
Display	The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.

After completing your filter selections:

	Click this button to display the report results.
	Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

Report Results

Financial						
Agency	Grant	Category	Total	Used	Remaining	% Rem
7/29/2013	CH12-13	Health Insurance Premium	0.00	4,984.04	-4,984.04	
7/29/2013	CH12-13	Medicare Supplement	20,000.00	3,258.06	16,741.94	83.70%
2 records, generated 8/23/2013 11:23:04 AM						
Criteria: Service Line Item Service Date BETWEEN '8/1/2013' AND '8/23/2013'						
						

The report results display in a table listed in ascending order by agency name. From left to right, the table lists agency name, grant number, grant category, grant total, amount used, amount remaining and percent remaining.

Note: If you are an administrative agency user, subagencies are included in the report.

At the bottom of the table, the number of records and the time and date of the report display, and the filter parameters specified in the previous screen.

The bottom of the table displays the number of records and the time and date of the report display, as well as the filter parameters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

Report Filter Values
Financial

Contract All
CH08-09
CH10-11
CH11-12
CH12-13
D TestA

Service All
Ryan White
--Outpatient/Ambulatory Medical Care
----Outpatient/Ambulatory Medical Care
----Acupuncture
----CD-4 T-Cell Count

Service Date Between 8/1/2013 & 8/23/2013

Display 1000 results Display print format

Report > **Export**

Click **Export** on Report Filter Values will bring up a download dialog.

Export Results: Financial

Export Format XML

Export

Please click the Download button to save the file to your computer. Then open it with your application. If you used the Table option, there will be a separate button for each table within your report, and you must download each one separately.

ReportResultsExport7205964039.xml **Download**

5.5 Management Reports

The management reports screen contains reports that center around your agency and its staff. You can run reports on ARIES usage or on incomplete tasks in your agency.

Management Reports	
Staff User	Displays staff person, role, and last login with filters on role and last login.
Care Plan Incomplete Tasks	Displays client, staff, client contact, assigned to, task, and follow-up date with filters for follow-up date and staff person last name
Unsigned Case Notes	Displays client, staff person, and date of note for all unsigned case notes with a filter on staff person last name.

If you are an ARIES administrator and you want to change the order in which the reports are listed, click the **Display Order** button at the bottom of the screen, which takes you to the [Change Display Order](#) screen.

The Management Reports screen includes:

- [Staff User](#)
- [Care Plan Incomplete Tasks](#)
- [Unsigned Case Notes](#)

Note: The filter values on most ARIES reports include a date range requirement. Be aware that the wider the date range, the more information your report will contain; and the longer the time required to generate it.

5.5.2 Staff User

The Staff User report tracks when staff persons most recently accessed ARIES. You can sort by staff role and last sign-on date. For example, you can run a report to see which volunteers most recently logged on to ARIES.

To access the report, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Report > Management** menu item to access the Management Reports screen.
- Click the "Staff User" link.

Report Filter Values

Report Filter Values

Staff User

Role	<div style="border: 1px solid black; padding: 2px;"> All EIP Team Members Agency Management Volunteer Peer Advocate Data Entry </div>		
Last Signon Date	<input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>	&	<input type="text" value=""/> <input type="text" value=""/>
Agency Name	<input type="text" value=""/> <input type="text" value=""/>	&	<input type="text" value=""/> <input type="text" value=""/>
Display	<input type="text" value="1000"/>	results	<input type="checkbox"/> Display print format
<div style="display: flex; justify-content: center; gap: 10px;"> Report > Export </div>			

Clicking on the link brings up the filter screen where you can define the parameters of your report.

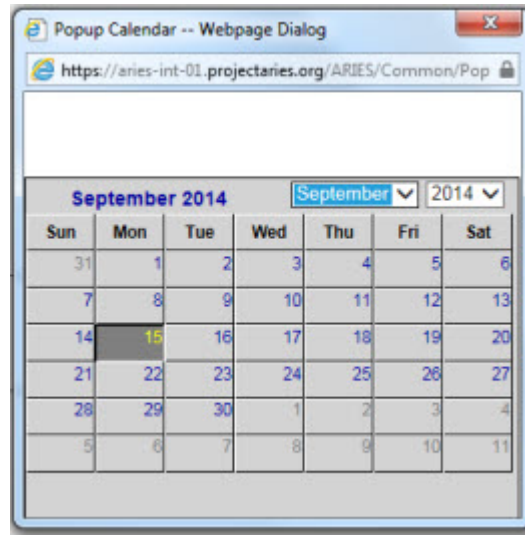
Complete the fields as follows:

Role list box	<p>In the list box, select the category of staff person that you wish to report on.</p> <p>To filter for a specific staff role: Select the specific role from the list box.</p> <p>To filter through multiple staff roles: Hold down the Control key (Ctrl) on your keyboard while clicking the entries you wish to select. For example, holding the Control key down while clicking "Volunteer," "Peer Advocate," and "Data Entry" will highlight all three options.</p> <p>To include all staff roles: Select All.</p>
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Last Signon Date

You can also search by last logon date. For example, you can report on which staff persons last signed onto ARIES over the past month. From the dropdown list, select the last signon date filter.

To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.



Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Filters:

To filter for all staff persons whose last logon was **on a specific date**: Select "On" from the dropdown list and enter a date in the first text field to filter for records for a given day. Example: If you wanted to search for all staff persons whose last logon was on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.



To filter for all staff persons whose last logon was **before a specific date**: Select "Before" from the dropdown list to sort through all entries before, but not including, a specific date. Example: If you wanted to search for all staff persons whose last logon was before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for all staff persons whose last logon was **after a specific date**: Select "After" from the dropdown list and enter a specific date to filter for records after a given day. Example: If you wanted to search for all staff persons whose last logon was after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.

To filter for all staff persons whose last logon was **within a range of dates**: Select "Between" from the dropdown list to sort through all entries between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all staff persons whose last logon was from

	<p>12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.</p> <p><u>To filter through all staff persons with no last signon date:</u> Select "Is Null" from the dropdown list to sort through all records that have no date entered. This can be helpful in searching for incomplete or missing information.</p> <p><u>To filter through all staff persons with a last signon date:</u> Select "Is Not Null" from the dropdown list to sort through all records that have a date. Leave the text fields empty.</p> <p><u>To skip this filter:</u> Select the blank option from the dropdown and leave the text fields empty.</p> <p>Note: A staff person who may have logged in more recently than the period you specify for your report will not be included in the report.</p>
Agency Name	Use the dropdown to select an Agency Name filter. Choices are Before, After, Between, Like, Is Null and Is Not Null, and blank. After you select a filter, use the text boxes to enter the agency name or names you are interested in.
Display	The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.

After completing your filter selections:

	Click this button to display the report results.
	Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

Report Results

Staff User

Agency Name	Staff	Role	Last Signon
Shasta Test Services	Betty Blake	Outreach Worker	02/23/2016
Shasta Test Services	Bill Hunter	Agency Management	08/25/2010
Shasta Test Services	Jojo Jones	Insurance Analyst	12/04/2015
Shasta Test Services	Molly B. Lawless	Case Manager	07/01/2014
Shasta Test Services	Nancy McCampbell	Agency Management	01/20/2016
Shasta Test Services	outreachworker.outreachworker	Outreach Worker	09/24/2015
Shasta Test Services	Cindy Rella	Insurance Analyst	03/11/2016
Shasta Test Services	Testy Tester	Volunteer	01/13/2016
Shasta Test Services	Roberta Van Dyke	Data Entry	12/02/2015
Shasta Test Services	Testor Wilard	Volunteer	02/04/2016
Shasta Test Services	Ca Windows	EIP Team Members	12/10/2015

11 records, generated 3/14/2016 1:01:42 PM
Criteria: Staff Last Signon < '3/14/2016'

Export

The bottom of the table displays the number of records and the time and date of the report display, as well as the filter parameters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.5.3 Care Plan Incomplete Tasks

Case managers routinely perform needs assessments for clients, evaluating what services they require. From these assessments, care plans are constructed outlining tasks necessary to meet the client's needs. Tasks are given target dates and assigned to staff persons. With a Care Plan Incomplete Tasks report, agency managers can track unfinished tasks.

To access the report, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Report > Management** menu item to get to the Management Reports screen.
- Click the "Care Plan Incomplete Tasks" link.

Report Filter Values

Report Filter Values

Care Plan Incomplete Tasks

Follow-up Date After 3/31/2011 & []

Staff Last Name Is Not Null [] & []

Display 1000 results Display print format

Report >
Export

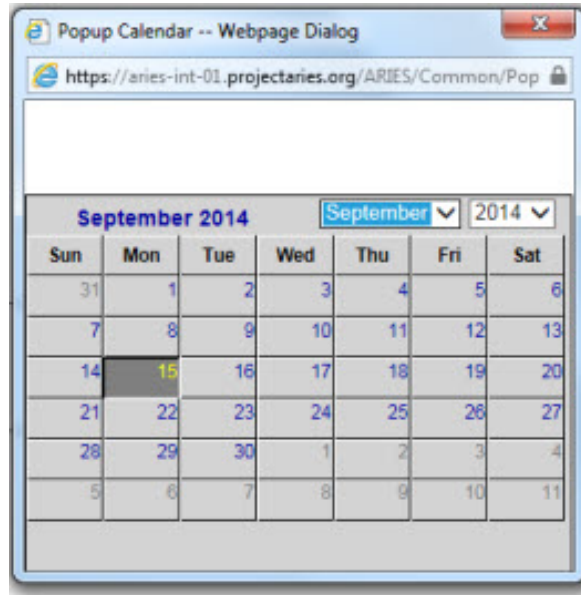
Clicking on the link brings up the filter screen where you can define the parameters of your report.

Complete the fields as follows:

Follow-up Date	Use the Follow-Up filter to specify a range of dates for your report. For example, you can report on unfinished tasks from the previous six months.
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From the dropdown list, select the follow-up date filter.

To enter a date in the text fields, use the format MM/DD/YYYY. You can also click the calendar icon to use the pop-up calendar.



Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Filters:

To filter for all follow-ups **on a specific date**: Select "**On**" from the dropdown list and enter a date in the first text field to filter for records for a given day. Example: If you wanted to search for all follow-ups on 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.

To filter for all follow-ups **before a specific date**: Select "**Before**" from the dropdown list to sort through all entries before, but not including, a specific date. Example: If you wanted to search for all follow-ups before 6/23/2010, enter the date 6/23/2010 in the first text field. Leave the second text field empty.



To filter for all follow-ups **after a specific date**: Select "**After**" from the dropdown list and enter a specific date to filter for records after a given day. Example: If you wanted to search for all follow-ups after October 1, 2010, enter 10/1/2010 in the first text field. Leave the second text field empty.

To filter for all follow-ups **within a range of dates**: Select "**Between**" from the dropdown list to sort through all entries between a range of dates. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all follow-ups from 12:00 AM the first date to 11:59 PM the second date. Example: Enter 6/23/2010 in the first text field and 6/27/2010 in the second text field.

	<p>To filter through all follow-ups with no date: Select "Is Null" from the dropdown list to sort through all follow-ups that have no date entered. Leave the text fields empty. This can be helpful in searching for incomplete or missing information.</p> <p>To filter through all follow-ups with dates: Select "Is Not Null" from the dropdown list to sort through all follow-ups that have a date. Leave the text fields empty.</p> <p>To skip this filter: Select the blank option from the dropdown and leave the text fields empty.</p>
Staff Last Name	<p>Using the Staff Last Name filter, you can report on unfinished tasks for clients assigned to a specific staff person. From the dropdown list, select the filter by staff person.</p> <p><u>Filters:</u></p> <p>To filter for clients assigned to a specific staff person: Select "Equals" from the dropdown list and entering the staff person's last name in the first text field. Example: Selecting "Equals" and entering "Jones" in the first text field filters for clients assigned to any staff person whose last name is Jones.</p> <p>To filter for clients assigned to all staff persons whose last name starts before a given letter: Select "Before" from the dropdown list to sort through all entries before, but not including, a specific letter. Example: If you wanted to search for all staff persons whose last name started before E, enter E in the first text field. Leave the second text field empty.</p> <p>To filter for clients assigned to all staff persons whose last name starts after a given letter: Select "After" from the dropdown list to sort through all entries before, but not including, a specific letter. Example: If you wanted to search for all staff persons whose last name started after G, enter G in the first text field. Leave the second text field empty.</p> <p>To filter for a range of partial names of staff persons: Select "Between" from the dropdown list and enter the alphabetical range you wish to report on. Example: To search records for staff persons whose last names start with letters from D through K, enter "D" and "L" in the two text fields. ARIES searches all entries from D up to, but not including, L.</p> <p>To filter through all records with no staff person entered: Select "Is Null" from the dropdown list to sort through all records that have no data entered. Leave the text fields empty. This can be used to search for any clients who have not yet been assigned to a staff person.</p> <p>To filter through all records assigned to any staff person: Select "Is Not Null" from the dropdown list to include only the clients who have been assigned to any staff person. Leave the text fields empty.</p> <p>To skip this filter: Select the blank option from the dropdown list.</p>
Display	<p>The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report.</p>

	The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.


After completing your filter selections:

	Click this button to display the report results.
	Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

Report Results

Care Plan Incomplete Tasks					
Client Name	Staff	Client Contact Info	Assigned To	Task	Follow-up Date
Miles Davis	San Antonio User1	Do not contact	Client	Set appt. with provider	05/24/2011
Dolly Dimples	San Antonio User1	Do not contact	Client	Call SAAF	04/07/2011
Doe Janisa	CaseManager_WebEx	415-445-1234 Be confidential. Messages OK.	Client	Keep a spending log (daily)	05/17/2011
Janis Joplin	San Antonio User1	Do not contact	Client	Call SAAF	04/07/2011
Michelle Jordan	San Antonio User1	Do not contact	Client	set appt with provider	05/24/2011
Sarah Lane	San Antonio User1	Do not contact	Client	Call SAAF	04/07/2011
Salome Lopez	San Antonio User1	Do not contact	Client	call SAAF	04/07/2011
Andrew Mcklintock	Tony_DoeDoe	Do not contact	Client	Make Dental Appt	04/10/2011
Cat Powers	San Antonio User1	Do not contact	Client	Set appointment with provider	05/24/2011
Donna Summers	San Antonio User1	Do not contact	Client	Set Appoint with Provider	05/24/2011
Nancy Trevino	San Antonio User1	Do not contact	Wichita Falls User 1	Call SAAF	04/07/2011

11 records, generated 6/22/2011 4:01:52 PM
 Criteria: Care Plan Task Outcome Date IS NULL AND Care Plan Task Follow-up Date > '3/31/2011' AND Staff Last Name IS NOT NULL



The report results display in a table alphabetized in ascending order by client name. From left to right the table lists the client name, the staff person assigned to them, the client's contact info, the client or the staff person the task was assigned to, the task, and the follow-up date.

- Clicking the staff person's name takes you to the staff detail page for the agency person.
- Clicking on the client name takes you to their contact info screen.
- The Assigned To can be either the client or a staff person.
 - Clicking on the client takes you to their contact info screen.
 - Clicking the staff person's name takes you to the staff detail page for the agency person.

Client Contact Information

Do not contact - The client does not want to be contacted in any way.

Do not phone - The client does not want to be contacted by telephone.

Messages OK - You can leave a phone message or a message with another person.

Be confidential - messages OK - You can leave a phone message or a message with another person but do not mention the name of the agency with the message.

Be confidential - no messages - The client does not want any message left on voice mail or with other persons.

The bottom of the table displays the number of records and the time and date of the report display, as well as the filter parameters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.5.4 Unsigned Case Notes

Staff persons enter [case notes](#) for clients, which can be helpful to track client progress and for other staff persons. To make them accessible to others, the case notes must be complete and signed. Case managers or agency managers can run Unsigned Case Notes reports to generate a list of unfinished case notes.

To access the report, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Report > Management** menu item to get to the Management Reports screen.
- Click the "Unsigned Case Notes" link.

Report Filter Values

The screenshot shows a web interface titled "Report Filter Values" for "Unsigned Case Notes". It features a "Staff Last Name" filter section with a dropdown menu set to "Between", two text input fields containing "G" and "H", and an "&" symbol between them. Below this is a "Display" section with a text input field containing "10" and the word "results" in blue. To the right of "results" is a checkbox labeled "Display print format" which is currently unchecked. At the bottom of the form are two buttons: a yellow "Report >" button and a blue "Export" button.



Clicking on the link brings up the filter screen where you can define the parameters of your report.

Complete the fields as follows:

Staff Last Name	<p>Using the Staff Last Name filter, you can report on unsigned case notes for a specific staff person. From the dropdown list, select the filter by staff person.</p> <p>Filters:</p> <p><u>To filter for unsigned case notes assigned to a specific staff person:</u> Select "Equals" from the dropdown list and entering the staff person's last name in the first text field. Example: Selecting "Equals" and entering "Jones" in the first text field filters for unsigned case notes assigned to any staff person whose last name is Jones.</p>
------------------------	--

	<p>To filter for unsigned case notes assigned to all staff persons whose last name starts before a given letter: Select "Before" from the dropdown list to sort through all entries before - but not including - a specific letter. Example: If you wanted to search for all staff persons whose last name started before E, enter E in the first text field. Leave the second text field empty.</p> <p>To filter for unsigned case notes assigned to all staff persons whose last name starts after a given letter: Select "After" from the dropdown list to sort through all entries before - but not including - a specific letter. Example: If you wanted to search for all staff persons whose last name started after G, enter G in the first text field. Leave the second text field empty.</p> <p>To filter for unsigned case notes for a range of partial names of staff persons: Select "Between" from the dropdown list and enter the alphabetical range you wish to report on. Example: To search unsigned case notes for staff persons whose last names start with letters from D through K, enter "D" and "L" in the two text fields. ARIES searches all entries from D up to, but not including, L.</p> <p>To filter through all unsigned case notes with no staff person entered: Select "Is Null" from the dropdown list to sort through all unsigned case notes that have no staff person entered. Leave the text fields empty. This can be used to search for any unsigned case notes.</p> <p>To filter through all unsigned case notes assigned to any staff person: Select "Is Not Null" from the dropdown list to include only unsigned case notes which have been assigned to any staff person. Leave the text fields empty.</p> <p>To skip this filter: Select the blank option from the dropdown list.</p>
<p>Display</p>	<p>The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.</p>
<p>Display print format checkbox</p>	<p>Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.</p>

After completing your filter selections:

	<p>Click this button to display the report results.</p>
	<p>Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports.</p>

Report Results

Unsigned Case Notes		
Client Name	Staff	Date of Note
Simone Allison	Shawna Garcia	01/12/2006
Cathy Arandt	Shawna Garcia	02/21/2006
Elmer Fudd	Matt Geltmaker	07/05/2007
Mary Keiser	Cindy Garza	06/24/2009
John Smith	Matt Geltmaker	10/05/2007
Lisa Ysatis	Cindy Garza	03/12/2009

6 records, generated 6/22/2011 4:18:04 PM
 Criteria: Case Note Signed And Sealed Date IS NULL AND Staff Last Name BETWEEN 'G' AND 'H'

[Export](#)

The report results display in a table alphabetized in ascending order by client name. From left to right the table lists the client name, the staff person working on the case notes, and the date the case notes were most recently edited.

- Clicking the staff person's name takes you to the staff detail page for the agency person.
- Clicking on the client name takes you to their contact info screen.

The bottom of the table displays the number of records and the time and date of the report display, as well as the filter selections specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.6 Cross Tab Reports

The Cross Tab Wizard allows users with the proper permissions to generate Cross Tab Reports. Cross Tab Reports are reports that count service or client data and then compare them in a table. For example, you can generate a Cross Tab Report on secondary services by zip code. The report counts the number of services administered by your agency and separates them in a table by zip code. For reports on clients, only clients who receive services are included in your results.

You can also generate multiple tables to compare your data using a third variable. For example, you could generate a count of secondary services by zip code and separate them into discrete tables for each month.

Once you generate your report, you can export your data for post-processing. You can also save the parameters of your report for future use.

You can use the Cross Tab Wizard to create the Cross Tab Reports listed below:

- [Report - Counting Clients Served](#)
- [Report - Counting All Clients](#)
- [Report - Counting Service Records](#)
- [Report - Counting Service Units](#)
- [Report - Services by Table](#)

The Cross Tab Wizard screens include:

- [Cross Tab Wizard Parameters](#)
- [Cross Tab Report Results](#)

- [Saving a Cross Tab Report](#)

5.6.1 Cross Tab Reports - Counting Clients Served

This type of Crosstab Report counts the number of distinct clients who received a service between a range of dates. For example, if you wanted to compare the number of primary services to client gender, your report will count the number of clients who received primary services and separate them into columns by gender. Even if a client received multiple primary services within the time span you define, they are only counted once.

These reports are useful in analyzing the number of individuals who receive your agency's services.

Note: A reminder that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

To access the Crosstab Wizard, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Report > Crosstab Wizard** menu.

Crosstab Report

Data to Summarize * Count Clients Served ▾

Service Start Date 1/1/2013 📅

Service End Date 12/31/2013 📅

Funding Source
All
Ryan White Part A

Contract
All

Program
All
Ryan White
CARE-HIPP
HOPWA

Row * Adherence - ART ▾

Column * Adherence - ART ▾

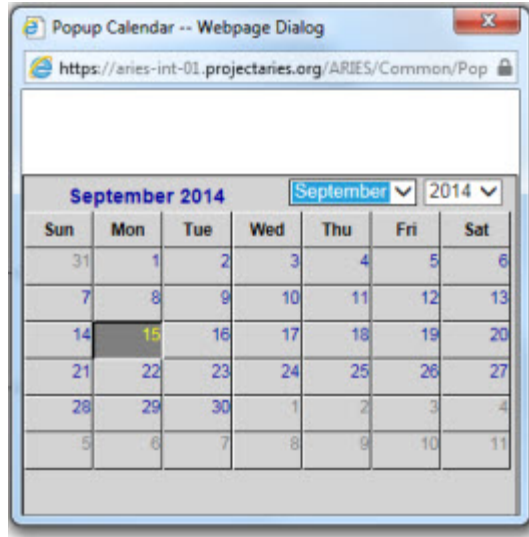
Table ▾

Unique Client Identifier Extended URN HRSA URN
 Display print format

Report > **Export**

Use the Crosstab Wizard to define the parameters for your report. Fields marked by a red asterisk are required.

Data to Summarize	From the dropdown list select Count Clients Served . ARIES will count the number of individual clients receiving services; e.g., a client who receives five services within these dates will still only count as a single client.
Service Start and End Dates	If you want to specify a timespan for your report, use the Service Start Date and End Date text fields. Enter the dates using the format MM/DD/YYYY. E.g., for January 28, 2011, enter 1/28/2011. You can also click the calendar icon to use the pop-up calendar.





Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Note: Leaving these fields empty reports on all your agency's clients who have ever received a service.

Funding Source	Optional. Select one or more funding sources, or leave set to default "All."
Contract	Optional. Select one or more contracts, or leave set to default "All."
Program	Optional. Select one or more programs, or leave set to default "All."
Row	Use the dropdown list to select which data types you want displayed in the rows of your report. For example, selecting "Gender" will display all of the clients' gender types in the rows of your table. Selecting "Services > Secondary Category" will list all the secondary services provided by your agency.
Column	Use the dropdown list to select which data types you want displayed in the columns of your report. For example, selecting "Service Date YYYY/MM" will display columns by month and will calculate the number of distinct clients served for that month. Note: The filter values on most ARIES reports include a date range requirement. Be aware that the wider the date range, the more information your report will contain; and the longer the time required to generate it.
Table	Optionally, you can use the Table dropdown to generate multiple tables for the data type you specify. From the Table dropdown list, select the criterion for the different table values. ARIES will generate separate tables based on the criterion you select. For example, selecting "Residence - ZIP Code" will display a table for each zip code serviced by your agency.

	See the Crosstab Reports - Services by Table help for more details.
Unique Client Identifier	Select a radio button to identify clients in the report by Extended URN (the default) or HRSA URN.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.

After selecting your filter values:



	Click this button to display the report results.
	Click this button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports . Note: You may also export data by clicking Export on the report results screen.

5.6.1.1 Cross Tab Report Results - Counting Clients Served

The results of your report display in a table or a series of tables depending on your report parameters, tabulating the clients who received services based on your filters. The row and column criteria for your report display above the table. Within the table, the row and column headings correspond to the data types specified in the Crosstab Wizard. For example, if you chose "Service - Secondary Category" for your rows, each separate secondary service type provided by your agency would have a separate row. If you chose "Service Date yyyy/mm" for your columns, each column represents a month.



Crosstab Result						
Adherence - ART by Adherence - ART						
Adherence - ART	0	1	2	3	Null	UDC
0	1	0	0	0	0	1
1	0	1	0	0	0	1
2	0	0	3	0	0	3
Null	0	0	0	0	12	12
UDC	1	1	3	0	12	17

Generated 4/22/2014 2:42:37 AM for service dates between 4/1/2014 and 4/22/2014, for programs: Ryan White, for funding sources: Test Fund A, for contracts: RB21342

- If there is no data for a given row or column, it will not display. For example, if your agency does not provide residential services, ARIES will not display a row for any residential services. Or, if your agency didn't provide services for the month of May, 2011, ARIES will not display a column for May, 2011.
- If you include table parameters in your report, each separate table represents an entry.
- The values in each cell represent the number of distinct clients who received services. For example, if a client received 20 services in a given month, they would still only count once in a given month.

- At the far right of the table is the number of unduplicated clients (UDC) who received services over the entire time span of your report.
 - **Note:** The sum of the columns may not equal the total numbers. For example, if clients receive services in multiple months, they still only count once in the UDC column. The bottom row of the table lists the number of unduplicated clients (UDCs) for each column.
- Beneath the table are the date and time the report was generated and the range of service dates. If you selected parameters from the Funding Source, Contract and Program list boxes before running the report, the parameters will be included in the message "Generated <date / time> for service dates..." This feature may or may not be available depending on your installation's configuration. Check with your System Administrator for additional information.

	Click this button to save your Cross Tab report results and return to the Client Reports menu.
	Click this button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

5.6.2 Cross Tab Reports - Counting All Clients

This type of Crosstab Report counts the number of distinct active clients who exist in your agency, regardless of whether they received services. The report is not dependent on services; therefore the text boxes for entering the range of service dates are disabled when you select this option. If you query on the number of clients who opted to share by gender, your report will count the number of clients who shared and those who did not share and separate them into columns by gender. Each client is counted only once.

These reports are useful in analyzing the number of client records at your agency without regards to actual services.

To access the Crosstab Wizard, from the [ARIES menu bar](#) at the top of the ARIES screen:

- Select the **Report > Crosstab Wizard** menu.

Crosstab Report

Data to Summarize * Count All Clients ▼

Service Start Date 📅

Service End Date 📅

Funding Source All
Ryan White Part B ⬆
Ryan White Part C ⬇
Ryan White Part D

Contract All
Insurance 2013
RA11-12
RB21342

Program All
Ryan White ⬆
CARE-HIPP ⬇
HOPWA

Row * Adherence - ART ▼

Column * Adherence - ART ▼

Table ▼

Unique Client Identifier Extended URN HRSA URN

Display print format



Report > Export

Use the Crosstab Wizard to define the parameters for your report. Fields marked by a red asterisk are required.

Data to Summarize	From the dropdown list select Count All Clients.
Service Start and End Dates	These fields are disabled for this option.
Funding Source	Optional. Select one or more funding sources, or leave set to default "All."
Contract	Optional. Select one or more contracts, or leave set to default "All."

Program	Optional. Select one or more programs, or leave set to default "All."
Row	Use the dropdown list to select which data types you want displayed in the rows of your report. For example, selecting "Client - Shares Data" will display all the share status values for the system, which is Shared or Not Shared.
Column	Use the dropdown list to select which data types you want displayed in the columns of your report. For example, selecting "Gender" will display columns for each of the gender types.
Table	<p>Optionally, you can use the Table dropdown to generate multiple tables for the data type you specify.</p> <p>From the Table dropdown list, select the criterion for the different table values. ARIES will generate separate tables based on the criterion you select. For example, selecting "Residence - ZIP Code" will display a table for each zip code serviced by your agency.</p> <p>See the Crosstab Reports - Services by Table help for more details.</p>
Unique Client Identifier	Select a radio button to identify clients in the report by Extended URN (the default) or HRSA URN.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.

After completing your filter selections:

	Click this button to display the report results.
	<p>Click this button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports.</p> <p>Note: You may also export data by clicking Export on the report results screen.</p>

5.6.2.1 Cross Tab Report Results - Counting All Clients



The results of your report display in a table or a series of tables depending on your report parameters, tabulating the active clients in the system for your agency. The row and column criteria for your report display above the table. Within the table, the row and column headings correspond to the data types specified in the wizard. For example, if you chose "Service - Secondary Category" for your rows, each separate secondary service type provided by your agency would have a separate row. If you chose "Service Date yyyy/mm" for your columns, each column represents a month.

- **Note:** With Cross Tab Report Counting All Clients, selection from the Table dropdown is **not** optional. To run this report and prevent an error message, you **must** select a table.

Crosstab Result						
Adherence - ART by Adherence - ART						
Adherence - ART	0	1	2	3	Null	UDC
2	0	0	10	0	0	10
Null	0	0	0	0	8	8
UDC	0	0	10	0	8	18

Generated 4/22/2014 2:10:33 AM

- If there is no data for a given row or column, it will not display. For example, if your agency does not provide residential services, ARIES will not display a row for any residential services. Or, if your agency didn't provide services for the month of May, 2011, ARIES will not display a column for May, 2011.
- If you include table parameters in your report, each separate table represents an entry.
- The values in each cell represent the number of distinct clients for two axes. [TOM research: From old manual. Is the word axes correct?] For example, in the sample report above, 21 Transgender MTF clients opted to share their data with other ARIES agencies.
- At the far right of the table is the number of unduplicated clients (UDC) who received services over the entire time span of your report.
 - **Note:** The sum of the columns may not equal the total numbers. For example, if clients receive services in multiple months, they still only count once in the UDC column. The bottom row of the table lists the number of unduplicated clients (UDCs) for each column.
- Below the table are the date and time the report was generated and the range of service dates.

	Click this button to save your Cross Tab report results and return to the Client Reports menu, where a link to the report will be displayed.
	Click this button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

5.6.3 Cross Tab Reports - Counting Service Records

This type of Cross Tab Report counts the number of services provided by your agency, based on your table criteria. For example, if you want to compare the number of primary services to client gender, your report will count the number of primary services provided by your agency and separate them into columns by client gender.

These reports are useful in analyzing your agency's service data.

To access the Cross Tab Wizard:

- From the [ARIES menu bar](#) at the top of the ARIES screen, choose **Report > Cross Tab Wizard**.

Crosstab Report

Data to Summarize * ▼

Service Start Date 📅

Service End Date 📅

Funding Source

 Minority AIDS Initiative ▲
 Ryan White Part A ▼
 Ryan White Part B

Contract

 RA13-14 ▲
 RB08-09 ▼
 RB21342

Program

 Ryan White ▲
 CARE-HIPP ▼
 HOPWA

Row * ▼

Column * ▼

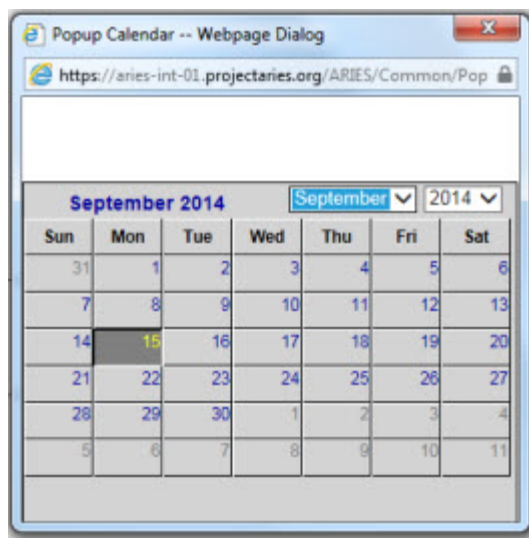
Table ▼

Unique Client Identifier Extended URN HRSA URN

Display print format

Use the Crosstab Wizard to define the parameters for your report. Fields marked by a red asterisk are required.

Data to Summarize	From the dropdown list, select Count Service Records .
Service Start and End Dates	To specify a timespan for your report, use the Service Start Date and End Date text fields. Enter the dates using the format MM/DD/YYYY. E.g., for January 28, 2011, enter 1/28/2011. You can also click the calendar icon to use the pop-up calendar.





Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Note: Leaving these fields empty reports on all your agency's service records.

Funding Source	Optional. Select one or more funding sources, or leave set to default "All."
Contract	Optional. Select one or more contracts, or leave set to default "All."
Program	Optional. Select one or more programs, or leave set to default "All."
Row	Use the dropdown list to select which data types you want displayed in the rows of your report. For example, selecting "Gender" will display all of the clients' gender types in the rows of your table. Selecting "Services - Secondary Category" will list all the secondary services provided by your agency.
Column	Use the dropdown list to select which data types you want displayed in the columns of your report. For example, selecting "Residence - ZIP Code" will display all the zip codes of the clients serviced by your agency. Note: The filter values on most ARIES reports include a date range requirement. Be aware that the wider the date range, the more information your report will contain; and the longer the time required to generate it.
Table	Optionally, you can use the Table dropdown to generate multiple tables for the data type you specify. From the Table dropdown list, select the criterion for the different table values. ARIES will generate separate tables based on the criterion you select. For example, selecting "Residence - ZIP Code" will display a table for each zip code serviced by your agency.

	See the Crosstab Reports - Services by Table help for more details.
Unique Client Identifier	Select a radio button to identify clients in the report by Extended URN (the default) or HRSA URN.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.

After completing your filter selections:



	Click this button to display the report results.
	Click this button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports . Note: You may also export data by clicking Export on the results page.

5.6.3.1 Cross Tab Report Results - Counting Service Records

The results of your report display in a table or a series of tables depending on your report parameters. Above the table displays the row and column criteria for your report. Within the table, the row and column headings correspond to the data types specified in the wizard. For example, if you chose "Service - Secondary Category" for your rows, each separate secondary service type provided by your agency would have a separate row. If you chose "Service Date yyyy/mm" for your columns, each column would represent a month.



Crosstab Result				
Service - Primary Category by Residence - ZIP Code				
Service - Primary Category	45616	78701	94110	UDC
Ryan White:AIDS Pharmaceutical Assistance (local)	1	0	0	1
Ryan White:Oral Health Care	0	2	1	3
Ryan White:Outpatient/Ambulatory Medical Care	5	0	3	8
UDC	6	2	4	12

Generated 4/22/2014 2:22:25 AM for service dates between 7/1/2012 and 6/30/2013, for funding sources: Ryan White Part A, for contracts: RA12-13

- If there is no data for a given row or column, it will not display. For example, if your agency does not provide residential services, ARIES will not display a row for any residential services. Or, if your agency didn't provide services for the month of May, 2011, ARIES will not display a column for May, 2011.
- If you include table parameters in your report, each separate table represents an entry.
- The values in each cell represent the number of services provided by your agency over the entire time span of your report for that row. The bottom row of the table displays the total number of services for each column.
- At the far right of the table is the total number of service records for the entire time span of your report.

- Below the table are the date and time the report was generated and the range of service dates. If you selected parameters from the Funding Source, Contract and Program list boxes before running the report, the parameters will be included in the message "Generated <date / time> for service dates..." This feature may or may not be available depending on your installation's configuration. Check with your System Administrator for additional information.

	Click this button to save your Cross Tab report results and return to the Client Reports menu, where a link to the report will be displayed.
	Click this button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

5.6.4 Cross Tab Reports - Counting Service Units

This type of Cross Tab Report sums the units of services provided by your agency based on your table criteria. For example, if you wanted to compare the number of primary services to client gender, your report will count the number of units of services provided by your agency and separate them into columns by client gender.

These reports are useful in analyzing your agency's service data.

Note: A reminder that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

To access the Cross Tab Wizard:

- From the [ARIES menu bar](#) at the top of the ARIES screen, choose **Report > Cross Tab Wizard**.

Crosstab Report

Data to Summarize * ▼

Service Start Date 📅

Service End Date 📅

Funding Source
 ▲
 Ryan White Part B ▼
 Ryan White Part C ▼
 Ryan White Part D ▼

Contract
 ▲
 RA13-14 ▼
 RB08-09 ▼
 RB21342 ▼

Program
 ▲
 Ryan White ▼
 CARE-HIPP ▼
 HOPWA ▼

Row * ▼

Column * ▼

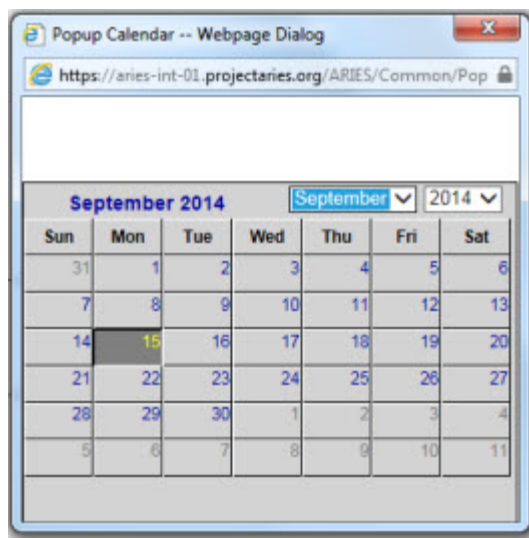
Table ▼

Unique Client Identifier Extended URN HRSA URN

Display print format

Use the Crosstab Wizard to define the parameters for your report. Fields marked by a red asterisk are required.

Data to Summarize	From the dropdown list select Count Service Units .
Service Start and End Dates	If you want to specify a timespan for your report, use the Service Start Date and End Date text fields. Enter the dates using the format MM/DD/YYYY. E.g., for January 28, 2011, enter 1/28/2011. You can also click the calendar icon to use the pop-up calendar.





Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Note: Leaving these fields empty reports on all your agency's clients who have ever received a service.

Funding Source	Optional. Select one or more funding sources, or leave set to default "All."
Contract	Optional. Select one or more contracts, or leave set to default "All."
Program	Optional. Select one or more programs, or leave set to default "All."
Row	Use the dropdown list to select which data types you want displayed in the rows of your report. For example, selecting "Gender" will display all of the clients' gender types in the rows of your table. Selecting "Services > Secondary Category" will list all the secondary services provided by your agency.
Column	Use the dropdown list to select which data types you want displayed in the columns of your report. For example, selecting "Service Date YYYY/MM" will display columns by month and will calculate the number of distinct clients served for that month. Note: The filter values on most ARIES reports include a date range requirement. Be aware that the wider the date range, the more information your report will contain; and the longer the time required to generate it.
Table	Optionally, you can use the Table dropdown to generate multiple tables for the data type you specify. From the Table dropdown list, select the criterion for the different table values. ARIES will generate separate tables based on the criterion you select. For example, selecting "Residence - ZIP Code" will display a table for each zip code serviced by your agency.

	See the Crosstab Reports - Services by Table help for more details.
Unique Client Identifier	Select a radio button to identify clients in the report by Extended URN (the default) or HRSA URN.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.

After selecting your filter values:



	Click this button to display the report results.
	Click this button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports . Note: You may also export data by clicking Export on the report results screen.

5.6.4.1 Cross Tab Report Results - Counting Service Units

The results of your report display in a table or a series of tables depending on your report parameters. The row and column criteria for your report are displayed above the table. Within the table, the row and column headings correspond to the data types specified in the wizard. For example, if you chose "Service - Secondary Category" for your rows, each separate secondary service type provided by your agency would have a separate row. If you chose "Service Date yyyy/mm" for your columns, each column would represent a month.



Crosstab Result			
Adherence - ART by Adherence - ART			
Adherence - ART	Null	2	Total
2		1.0000	1.0000
Null	1.0000		1.0000
Total	1.0000	1.0000	2.0000

Generated 4/22/2014 2:31:29 AM for service dates between 1/1/2013 and 12/31/2013, for programs: Ryan White, for funding sources: Ryan White Part A, for contracts: RA12-13

- If there is no data for a given row or column, it will not display. For example, if your agency does not provide residential services, ARIES will not display a row for any residential services. Or, if your agency didn't provide services for the month of May, 2011, ARIES will not display a column for May, 2011.
- If you include table parameters in your report, each separate table represents an entry.
- The values in each cell represent the number of units of service provided by your agency over the entire time span of your report that row. The bottom row of the table displays the total number of service units for each column.
- At the far right of the table is the total number of service units for the entire time span of your report.
- Below the table is date and time the report was generated and the range of service dates. If you selected parameters from the Funding Source, Contract and Program

list boxes before running the report, the parameters will be included in the message "Generated <date / time> for service dates..." This feature may or may not be available depending on your installation's configuration. Check with your System Administrator for additional information.

	Click this button to save your Cross Tab report results and return to the Client Reports menu, where a link to the report will be displayed.
	Click this button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

5.6.5 Cross Tab Reports - Services by Table

This type of Cross Tab Report counts the number of distinct clients or services provided by your agency and compares them based on three criteria. For example, if you wanted to compare the number of primary services to client gender and then compare them by month, your report will generate separate tables for every month. Each table would count the number of primary services provided by your agency and separate them into columns by client gender.

Note: Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

To access the Cross Tab Wizard:

- From the [ARIES menu bar](#) at the top of the ARIES screen, choose the **Report > Cross Tab Wizard** menu.

Crosstab Report

Data to Summarize * ▼

Service Start Date

Service End Date

Funding Source

Bill Gates Foundation
CA State Office of AIDS
CDC

Contract

04 - 05 RW 2
04 - 05 RW 2-Bcopy
05-06

Program

PCIP
MCWP
Ryan White

Row * ▼

Column * ▼

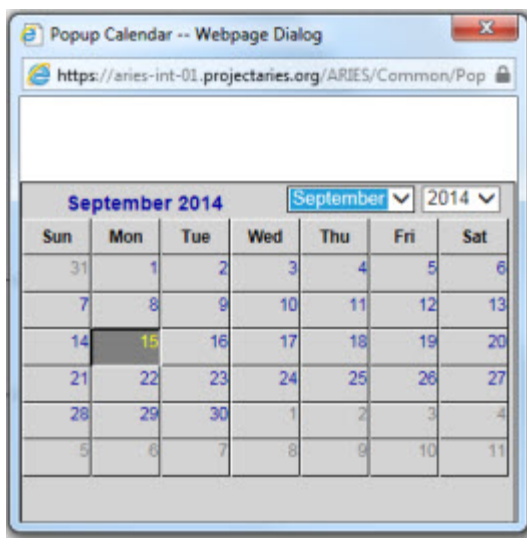
Table ▼

Unique Client Identifier Extended URN HRSA URN

Display print format

Use the Crosstab Wizard to define the parameters for your report. Fields marked by a red asterisk are required.

Data to Summarize	From the dropdown list, select Count Service Records .
Service Start and End Dates	To specify a timespan for your report, use the Service Start Date and End Date text fields. Enter the dates using the format MM/DD/YYYY. E.g., for September 15, 2014, enter 9/15/2014. You can also click the calendar icon to use the pop-up calendar.





Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.

Note: Leaving these fields empty reports on all your agency's service records.

Funding Source	Optional. Select one or more funding sources, or leave set to default "All."
Contract	Optional. Select one or more contracts, or leave set to default "All."
Program	Optional. Select one or more programs, or leave set to default "All."
Row	Use the dropdown list to select which data types you want displayed in the rows of your report. For example, selecting "Gender" will display all of the clients' gender types in the rows of your table. Selecting "Services - Secondary Category" will list all the secondary services provided by your agency.
Column	Use the dropdown list to select which data types you want displayed in the columns of your report. For example, selecting "Service - yyyy/mm" displays the month and year of the service date in the columns. Note: The filter values on most ARIES reports include a date range requirement. Be aware that the wider the date range, the more information your report will contain; and the longer the time required to generate it.
Table	Use the Table dropdown to select a table for the data type you specify. ARIES will generate separate tables based on the criterion you select. For example, selecting "Residence - ZIP Code" will display a table for each zip code serviced by your agency. See the Crosstab Reports - Services by Table help for more details.

Unique Client Identifier	Select a radio button to identify clients in the report by Extended URN (the default) or HRSA URN.
Display print format checkbox	Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.

After selecting your filter values:

	Click this button to display the report results.
	Click this button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports . Note: You may also export data by clicking Export on the report results screen.

5.6.5.1 Cross Tab Report Results - Services by Table

The results of your report display in a series of tables. Each separate table represents an entry. The row and column criteria for your report display above each table, along with the table criterion defined in the cross tab wizard. For example, if you chose "Residence - ZIP Code" for your table criterion, each table represents a different ZIP code of clients who are serviced by your agency.

Within each individual table, the row and column headings correspond to the data types specified in the wizard. For example, if you chose "Service - Secondary Category" for your rows, each separate secondary service type provided by your agency would have a separate row. If you chose "Service Date yyyy/mm" for your columns, each column represents a month.

Crosstab Result		
Service - Secondary Category by Service Date yyyy/mm with Residence - ZIP Code=03610		
Service - Secondary Category	2014/01	UDC
Ryan White:AIDS Pharmaceutical Assistance (local):Medication	1	1
UDC	1	1
Service - Secondary Category by Service Date yyyy/mm with Residence - ZIP Code=23432		
Service - Secondary Category	2014/01	UDC
CARE/HIPP:Health Insurance Premium:Medical Premium Payment	1	1
Medicare Part D:Medicare Supplement:Premium Payment	1	1
Ryan White:Outpatient/Ambulatory Medical Care:Follow-Up Visit	1	1
UDC	1	1
Service - Secondary Category by Service Date yyyy/mm with Residence - ZIP Code=24324		
Service - Secondary Category	2014/01	UDC
CARE/HIPP:Health Insurance Premium:Medical Premium Payment	1	1
UDC	1	1
Service - Secondary Category by Service Date yyyy/mm with Residence - ZIP Code=39880		
Service - Secondary Category	2014/01	UDC

Service - Secondary Category		
CARE/HIPP:Health Insurance Premium:Dental/Vision Premium Payment	1	1
UDC	1	1
Service - Secondary Category by Service Date yyyy/mm with Residence - ZIP Code=95600		
Service - Secondary Category	2014/01	UDC
CARE/HIPP:Health Insurance Premium:Dental Premium Payment	1	1
UDC	1	1
Service - Secondary Category by Service Date yyyy/mm with Residence - ZIP Code=97154		
Service - Secondary Category	2014/01	UDC
CARE/HIPP:Health Insurance Premium:Dental/Vision Premium Payment	1	1
UDC	1	1
Generated 4/22/2014 2:42:37 AM for service dates between 4/1/2014 and 4/22/2014, for programs: Ryan White, for funding sources: Test Fund A, for contracts: RB21342		
<input type="button" value="Save"/> <input type="button" value="Export"/>		

- If there is no data for a given row or column, it will not display. For example, if your agency does not provide residential services, ARIES will not display a row for any residential services. Or, if your agency didn't provide services for the month of May, 2011, ARIES will not display a column for May, 2011.
- The values in each cell represent the number of service records provided by your agency over the entire time span of your report for that row. The bottom row of the table displays the total number of service records for each column.
- At the far right of the table is the total number of service records, for each row, over the entire time span of your report.
- Beneath the table is date and time the report was generated and the range of service dates. If you selected parameters from the Funding Source, Contract and Program list boxes before running the report, the parameters will be included in the message "Generated <date / time> for service dates..." This feature may or may not be available depending on your installation's configuration. Check with your System Administrator for additional information.

<input type="button" value="Save"/>	Click this button to save your Cross Tab report results and return to the Client Reports menu, where a link to the report will be displayed.
<input type="button" value="Export"/>	Click this button to display the option of opening or saving the data for export purposes in XML, text comma-separated, or text tab-separated format. See the section titled Exporting Reports .

5.6.6 Cross Tab Wizard Parameters

In the Cross Tab Wizard screen, you can define the parameters for your Cross Tab Report. ARIES totals either the number of distinct clients or the number of services provided based on the criteria of your report. For example, you could create a report that counts how many services your agency provided based on client CD4+ count and gender. You could also add a third parameter of ZIP code and ARIES would generate separate tables for every ZIP code serviced by your agency.

Note: Remember that when a large red asterisk appears to the left of a data field, or in the column name above it, the field is HRSA-required. Fields marked by a red asterisk are

required to produce the RDR and CADR reports. Owing to HRSA requirements, a field marked with a red asterisk is required at every ARIES installation.

To access the Cross Tab Wizard, from the [ARIES menu bar](#) at the top of the ARIES screen, choose the Report > Cross Tab Wizard menu.

Crosstab Report

Data to Summarize * Count Clients Served ▼

Service Start Date 1/1/2014 📅

Service End Date 1/16/2014 📅

Funding Source All
Bill Gates Foundation
CA State Office of AIDS
CDC ⬆️
⬇️

Contract All
04 - 05 RW 2
04 - 05 RW 2-Bcopy
05-06 ⬆️
⬇️

Program All
PCIP
MCWP
Ryan White ⬆️
⬇️

Row * Service - Secondary Category ▼

Column * Service Date yyyy/mm ▼

Table Residence - ZIP Code ▼

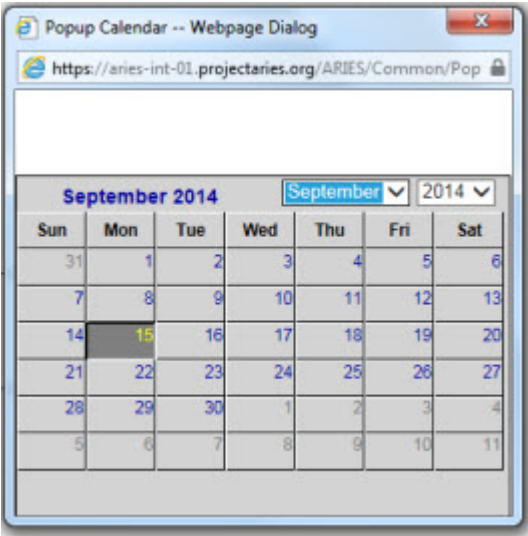
Unique Client Identifier Extended URN HRSA URN



Display print format

Report >
Export

Complete the fields as follows. Required fields are marked with a red asterisk (*).

Data to Summarize	From the dropdown list, select whether you want to count service records, service units, clients served or a count of all clients with or without service.
--------------------------	--

	<p>If you choose clients served, ARIES will count the number of individual clients receiving services; e.g., a client who receives five services within these dates will still only count as a single client.</p>
<p>Service Start Date</p>	<p>Leave this field and Service End Date empty to generate a report on all of your agency's service records.</p> <p>To specify a time span for your report, use the Service Start Date and End Date text fields. Enter the dates using the format MM/DD/YYYY. E.g., for January 28, 2010, enter 1/28/2010. You can also click the calendar icon to use the pop-up calendar.</p>  <p>Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.</p>
<p>Service End Date</p>	<p>Leave this field and Service Start Date empty to generate a report on all of your agency's service records.</p> <p>To specify a time span for your report, use the Service Start Date and End Date text fields. Enter the dates using the format MM/DD/YYYY. E.g., for January 28, 2010, enter 1/28/2010. You can also click the calendar icon to use the pop-up calendar.</p>
<p>Funding Source</p>	<p>Optional. Select one or more funding sources, or leave set to default "All." If you selected parameters from the Funding Source, Contract and Program list boxes before running the report, the parameters will be included in the message "Generated <date / time> for service dates..."</p>
<p>Contract</p>	<p>Optional. Select one or more contracts, or leave set to default "All." If you selected parameters from the Funding Source, Contract and Program list boxes before running the report, the parameters will be included in the message "Generated <date / time> for service dates..."</p>
<p>Program</p>	<p>Optional. Select one or more programs, or leave set to default "All." If you selected parameters from the Funding Source,</p>

	Contract and Program list boxes before running the report, the parameters will be included in the message "Generated <date / time> for service dates..."
Row	Use the Row dropdown list to select which data types you want displayed in the rows of your report. For example, selecting "Gender" will display all of the clients' gender types in the rows of your table. Selecting "Services - Secondary Category" will list all the secondary services provided by your agency.
Column	Use the Column dropdown list to select which data types you want displayed in the columns of your report. For example, selecting "Service - yyyy/mm" displays the month and year of the service date in the columns. Note: The filter values on most ARIES reports include a date range requirement. Be aware that the wider the date range, the more information your report will contain; and the longer the time required to generate it.
Table	From the Table dropdown list, you can add a third dimension to your report by generating multiple tables. Select the way you want the tables sorted. ARIES will generate separate tables based on the criterion you select. For example, selecting "Residence - ZIP Code" will display a separate table for each Zip code served by your agency.
Unique Client Identifier	To minimize duplicated results in this report, ARIES provides the option to identify clients by either HRSA URN or Extended URN . Select the appropriate radio button. Extended URN is the default selection.
Display print format	For printing purposes, you may select this checkbox to generate your report without the ARIES menu bar or buttons.
	Click the Report button to view results on the Cross Tab Report Results screen.
	Click the Export button to export your results to a file.

5.6.7 Cross Tab Report Results

The results of your report display in a table or series of tables, depending on your report parameters. The row and column criteria for your report display above each table. If you included a table criterion in the cross tab wizard, the results are displayed in multiple tables.

The row and column headings of the table correspond to the data types specified in the wizard. For example, if you chose "Service - Secondary Category" for your rows, each separate secondary service type in the date range would have a separate row. If you chose "Service Date yyyy/mm" for your columns, each column would represent a month.

If you included table parameters in your report, each separate table represents an entry. For example, if you chose "Residence - ZIP Code" for your table criterion, each table represents a different ZIP code of clients who are serviced by your agency.

If there is no data for a given row or column, it will not display. For example, if your agency does not provide residential services, ARIES will not display a row for any residential services. Or, if your agency didn't provide services for the month of May, 2010, ARIES will not display a column for May, 2010.

Crosstab Result						
Service - Secondary Category by Adherence - ART with Ethnicity-Minor Hispanic=						
Service - Secondary Category	0	1	2	3	UDC	
UDC	0	0	0	0	0	
Service - Secondary Category by Adherence - ART with Ethnicity-Minor Hispanic=Cuban						
Service - Secondary Category	0	1	2	3	UDC	
CARE/HIPP:Health Insurance Premium:Medical Premium Payment	0	0	1	0	1	
Ryan White:AIDS Pharmaceutical Assistance (local):Medication	0	0	1	0	1	
UDC	0	0	2	0	2	
Service - Secondary Category by Adherence - ART with Ethnicity-Minor Hispanic=Mexican/Mexican-American						
Service - Secondary Category	0	1	2	3	Null	UDC
CARE/HIPP:Health Insurance Premium:Dental/Vision Premium Payment	0	0	0	0	1	1
Medicare Part D:Medicare Supplement:Premium Payment	0	0	0	0	1	1
UDC	0	0	0	0	2	2
Service - Secondary Category by Adherence - ART with Ethnicity-Minor Hispanic=Spanish, Hispanic or Latino						
Service - Secondary Category	0	1	2	3	Null	UDC
CARE/HIPP:Health Insurance Premium:Dental Premium Payment	0	0	0	0	1	1
UDC	0	0	0	0	1	1
Generated 4/22/2014 2:42:37 AM for service dates between 4/1/2014 and 4/22/2014, for programs: Ryan White, for funding sources: Test Fund A, for contracts: RB21342						
<input type="button" value="Save"/> <input type="button" value="Export"/>						

The values in each cell represent the number of clients who received services, the number of clients, the number of services provided or the number of units of service, depending on the selection made in the wizard. At the far right of the table is the total number of services delivered or the number of unduplicated clients (UDC) who received services, for each row over the entire time span of your report.

If your report is on distinct clients served, the sum of the columns may not equal the UDC value. For example, if clients receive services in multiple months, they still only count once in the UDC column.

The bottom row of a table displays either the total services or number of UDCs for each column, depending on your cross tab type.

Below the table is date and time the report was generated. If you selected parameters from the Funding Source, Contract and Program list boxes before running the report, the parameters will be included in the message "Generated <date / time> for service dates..." This feature may or may not be available depending on your installation's configuration. Check with your System Administrator for additional information.

- To [export your report](#), click the **Export** button. To [save the parameters](#) of your query, click the **Save** button.

5.6.8 Saving a Cross Tab Report




The Cross Tab Save Report screen allows you to configure the way your Cross Tab report can be accessed.

Complete the fields as follows. Fields marked by a red asterisk are required.

<p>Report Name</p>	<p>Type a name for your report. Use a name that informs other staff persons of the report's function.</p> <p>Note: If you are editing an existing report, entering a new name will change the name of the existing report; it will not create a new report.</p>
<p>Report Description</p>	<p>Summarize the function of your report.</p>
<p>Who can run this report?</p>	<p>Specify which user or agency should be allowed to run the report.</p> <p>Myself Only: If you are not an administrative user, the system will automatically select "Myself Only," which is the only selection you can make.</p> <p><u>If you are an administrator of your agency or other agencies:</u> You can make the report viewable by all users within a specific agency, your entire administrative area or by an individual user.</p> <p><u>To permit the report to be viewed by anyone within an agency:</u> Select "An Agency" and choose the agency from the "Select Agency" dropdown.</p> <p><u>To permit the report to be viewed by anyone within your administrative area:</u> Select "An Admin Agency" and choose the name of the administrative agency in the "Select Admin Agency" dropdown.</p> <p><u>To permit the report to be viewed by an individual user:</u> Select "A user" and the user's name from the "Select User" dropdown.</p> <p><u>If you want everyone to see the report:</u> Check "Everyone." Checking this will permit only the users within your administrative jurisdiction the rights to view the report. If you administer only</p>

	your agency, then only the users within your agency will see the report.
Action when Report button is clicked	<p>This button offers two options:</p> <p><u>Display report parameters page:</u> Takes users to the Crosstab Wizard Parameters screen, so they can refine their report. For example, an agency manager performing the report monthly will need to be able to enter in dates when running the report.</p> <p><u>Immediately display results using stored parameter values:</u> Users will not be able to define filters and will go directly to the report results.</p>
Display print format radio buttons	<p>Check the "Yes" radio button to generate your report without the ARIES menu bar if you want to print your report directly from the browser window. This is useful for reports that are printed directly from ARIES without any post-processing.</p> <p>Otherwise check the "No" radio button.</p>
Report menu	<p>This dropdown list allows you to specify where your report can be accessed. There are report screens for Client, Services, Finances, Management, and Compliance.</p> <p>Select the screen that most accurately describes your report and gives the appropriate people access to it. For example, if your report counts unduplicated clients, it would probably belong in the Client reports screen.</p>

After completing the fields:

	Click this button to save your input and go to the menu where you are saving the report.
	Click this button to cancel the save and return to the Cross Tab Wizard screen.
	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>Notes:</p> <ul style="list-style-type: none"> • This option is available only to users with the appropriate permission level. • This option is also available on the menu where the report is stored. • You are prompted to confirm the deactivation.



To confirm the deactivation, click **OK**. You will remain on the menu where the report was stored.

Clicking **Deactivate** does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible.

If you do not want to deactivate the record, click **Cancel** and you will be returned to the Crosstab Wizard screen.

5.7 Compliance Reports

Programs that fund specialized services require compliance reports as part of the reimbursement process. ARIES helps automate the process with preconfigured reports. The reports allow you to control date parameters and then outputs the required compliance information in a table.

From the report results, you can copy and paste ARIES data directly into your documents and reports edited with Microsoft Word (version 2000 or later).

Use your cursor to highlight the text you wish to copy. From the Internet Explorer Edit menu, select "Copy." Bring up your Microsoft Word document and select "Paste" from the Edit menu.

The ARIES information displays, retaining its formatting and table structure. You can use Word's document tools to format your data further.

Compliance Reports

[Ryan White HIV/AIDS Services \(RSR\) Export \(2017\)](#)

Exports the Ryan White HIV/AIDS Services to an XML file (for 2017)

[Ryan White HIV/AIDS Services \(RSR\) Export \(2015-2016\)](#)

Exports the Ryan White HIV/AIDS Services to an XML file (for 2015-2016)

[Ryan White HIV/AIDS Services \(RSR\) Export \(2014\)](#)

Exports the Ryan White HIV/AIDS Services to an XML file (for 2014)

[Ryan White HIV/AIDS Services \(RSR\) Export \(2009-2013\)](#)

Exports the Ryan White HIV/AIDS Services to an XML file (for 2009-2013)

[OA Provider Reports](#)

Displays various performance measures for OA Provider agencies

The General Compliance Reports include:

- [Ryan White HIV/AIDS Services \(RSR\) Export](#) (2009-2013, 2014 and 2015-2017)
- [WICY Report](#)
- [HAB QM Indicators Report](#)
- [HAB QM Indicators Follow-up Report](#)
- [Share Status Change Report](#)

The HOPWA Compliance Reports consists of

- [HOPWA Progress Report Data](#) (incorporating Missing Data)

Note: The filter values on most ARIES reports include a date range requirement. Be aware that the wider the date range, the more information your report will contain; and the longer the time required to generate it.

Many ARIES report results screens include a Top of Page link at the bottom for easy navigation.

5.7.2 Ryan White HIV/AIDS Services Summary Report (RSR) and Missing RSR Data Report (2014)

The Ryan White HIV/AIDS Program Services Summary Report (RSR) is a reporting requirement for most recipients of funding from the Ryan White Program beginning in 2009. The RSR - which is distinct from the Ryan White HIV/AIDS Program Annual Data Report (RDR) - is submitted to the HIV/AIDS Bureau (HAB) within the U.S. Department of Health and Human Services. The RSR consists of three reports: the Grantee Report, the Provider Report, and the Client Report. The Client Report, which ARIES can generate for you, is an electronic file containing a record for each client served with Ryan White funds during the reporting period.

The record includes the client's demographics, select medical data, lab results, and a summary of the Ryan White-funded services provided, but does not include any identifying information about the client such as name or date of birth. The report includes results only for clients for whom [insurance start dates](#) are recorded in ARIES.

RSR Missing Data Report results are geared to the data requirements of the RSR and display at the bottom of the Results screen. Before running the RSR, you can set the Validation Report portion to sort by client or by data element.

To access the RSR Report:

- On the Reports menu, click **Compliance Reports**.

[Ryan White HIV/AIDS Services \(RSR\) Export \(2014\)](#)

Exports the Ryan White HIV/AIDS Services to an XML file (for 2014)

[Ryan White HIV/AIDS Services \(RSR\) Export \(2009-2013\)](#)

Exports the Ryan White HIV/AIDS Services to an XML file (for 2009-2013)

- On the Compliance Reports menu, click the [Ryan White HIV/AIDS Services \(RSR\) Export \(2014\)](#) link, which takes you to the RSR Export/Missing RSR Data Report screen.

- **Note:** To report on years after 2014, click [Ryan White HIV/AIDS Services \(RSR\) Export \(2015-2016\)](#) or [Ryan White HIV/AIDS Services \(RSR\) Export \(2017\)](#) from the Compliance Report Menu.

This takes you to the RSR Export screen.

Shasta Test Services

RSR Export 2015

Agency or Administrative Agency

Reporting Period

From **To**

ARIES ID

RSR Validation Report

Include Medical Data

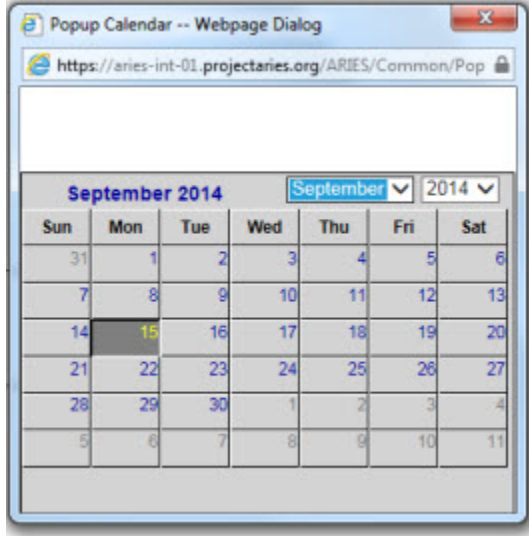
Sort By

Data Elements

RSR Export Filters Section

Complete the RSR Export fields as follows:

Agency or Administrative Agency	By default, if you manage only one agency, its name appears on the title for the screen. To run the report for any one agency, select the agency from the dropdown.
Aggregate Data for Administrative Agency checkbox (visible only to administrative agency users)	<p>Aggregate Reporting by an Administrative Agency:</p> <p>If you administer multiple agencies and are running an aggregate RSR for an administrative agency, follow these additional steps.</p> <ul style="list-style-type: none"> • Before running the RSR, check this box to run the report for all the agencies you manage after selecting your agency from the Agency dropdown. <p>Note: For an Aggregate RSR report, results will <i>not</i> include a Missing RSR Data Report, and the Missing Data Report download button will not display. If you need to export an aggregate RSR, contact your ARIES System Administrator. This file will contain a single RSR for all of the agencies administered by your organization.</p> <p>RSR Reporting Requirements:</p> <p>The RSR reporting requirements specify that each provider must submit a separate RSR. There are very few, if any, instances in which HAB allows an aggregate RSR for multiple providers to be submitted. Prior to submitting an aggregate report, you must have permission from HAB. To create an export file containing an</p>

	aggregate RSR, you must contact your ARIES support provider, who will run the report for you and send you the export file.
Reporting Period	To report on the current period, leave the default unchanged. Alternatively, you may report on a different period by selecting it from the Report Period dropdown list. See below for custom date ranges.
ARIES ID	Enter the ARIES ID in the text field. When you tab out of the field the Cleint name and date of birth will display to the right of the text box.
From and To Dates	<p>From the Reporting Period dropdown, choose a pre-set date range; or select "Input Custom Date Range."</p> <p>Note: The custom date range fields and calendar icons are disabled unless "Input Custom Date Range" is selected from the dropdown. If a custom date range is input and a pre-set date range is selected from the dropdown, the date fields will clear, and the fields and icons will be disabled.</p> <p>If you selected "Input custom date range" from the Reporting Period dropdown, fill in the dates in the "From" and "To" fields. Use the format MM/DD/YYYY. You can also use the pop-up calendar by clicking the calendar icon.</p>  <p>For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>

RSR Validation Report Filters Section



The Validation Report will run concurrently with the RSR Report. Complete the Validation Report fields as follows.

Note: When the Aggregate data for administrative agency checkbox is selected in RSR filters, the filters for Missing RSR Data Report are grayed out.

Include Medical Data	Use the dropdown to select whether or not you wish to include medical data. The default is "Yes." If you do not want to include this data, select "No."
Sort by	Use the dropdown to select whether you want to sort by Client or Data Elements. The default is "Client." If desired, select "Data Elements" instead.
Data Elements	Use the dropdown to limit the report to a single data element or to run the report for all data elements. The default is "All Elements."

After completing the fields in the RSR Export and Validation Report sections:

Select one of the following:

	Click Report to run the RSR with the filters you have entered. Results display below the filters and include both the RSR Summary Report and the RSR Missing Data Report.
	Click Cancel to cancel the report settings. You are taken to your agency's RSR/RDR tab.

Summary

The Results screen displays the agency name and reporting period at the top. Information displayed in the Summary includes the following: Provider Name, Report Period, Number of clients, number of clients with Outpatient/Ambulatory Medical Care Service, Enrollment status (with number of clients and percentage of total) and Age (with number of clients and percentage of total).

Enrollment Status		
	Number of Clients	% of Total
<small>(RSR ID: 2) The client's vital enrollment status at the end of the reporting period.</small>		
Active, continuing in program	8	80.00%
Referred to another program or services, or self-sufficient	0	0.00%
Removed from treatment due to violation of rules	1	10.00%
Incarcerated	0	0.00%
Relocated	0	0.00%
Deceased	1	10.00%
Missing	0	0.00%

Age		
	Number of Clients	% of Total
<small>(RSR ID: 4) Number of clients, by RDR Age category at the end of the reporting period.</small>		
Less than 2 years	0	0.00%
02-12 years	0	0.00%
13-24 years	0	0.00%
25-44 years	7	70.00%
45-64 years	2	20.00%

Reviewing the RSR Summary Report

This report is provided for your information only, to let you know what's inside the data file that you will submit to HAB.

A Top of Page link is provided at the bottom of the report results for easy navigation.

This report can be printed using the browser print icon.

Notes

- The report displays results only for clients for whom insurance start dates are recorded.
- Depending upon installation settings, the RSR may use either Family Income or Household Income to determine poverty level. This calculation switch is configurable at the installation level, with each ARIES installation having the ability to select which field is to be used for its RSR calculations.

If you have questions about the configuration, contact your ARIES administrator.

- If a client's Enrollment Status As-Of Date is AFTER the RSR reporting period, the client should be reported as "Active" on the RSR regardless of the value in the Enrollment Status field.
- The RSR allows only one pregnancy to be reported on the RSR, even though a client could have multiple ARIES pregnancy records that cover some portion of the reporting period.
- If the Agency Specifics enrollment date is AFTER the earliest service date within the report period, the enrollment date is reset to the earliest service date within the report period.
- If the Client has a Date of Death AFTER the end of the report period, the date of death is changed to the report end date.
- If the year in Date of Birth is AFTER the end of the report period, the Birth Year is changed to the report end date year.
- If the year in AIDS Diag Date is AFTER the end of the RSR report period, the AIDS diagnosis year is changed to the RSR report end date year.
- For Hepatitis vaccination, if the data is not found to support a "Not Medically Indicated" or a "Yes" response, the system substitutes the default response of "No."
- Below the results table is the date and time the report was generated.

This report was based on data generated at 11/18/2016 6:44:29 AM.

Reviewing the Missing Data Report

The RSR Missing Data Report runs concurrently with the RSR Report. Use this report to supply missing data by linking to the individual client's records via the client's name in the report. Results are geared to the data requirements of the RSR and display beneath the RSR Summary Report on the Results screen.

The RSR Missing Data Report displays at the bottom of the Results screen. The report identifies clients with missing RSR data for certain questions in the RSR, and the staff member who was responsible for completing the client's enrollment.

Client	Each row displays the name of the client as a link. Clicking on a link takes you to the client's Contact Info screen for that individual. From there, you can select the appropriate tab to locate the missing data.
---------------	--

	Note: If you had selected data elements to sort by, the screen would show "Missing Data Report - by Data Element."
Staff	The client's primary Staff person, as indicated in the Staff Assignment section of the Programs tab. This Staff person might be able to assist with finding and entering any missing data.
Missing RSR Data	This is a list of the data items missing for the client, from all relevant screens. Depending on your sort criteria, the column will show either all elements, or the element you selected to sort by.

Missing data messages are sorted into three columns to indicate the importance of the data problem.

- **Errors:** Data must be fixed before the RSR can be submitted.
- **Warnings:** The RSR may be submitted with a comment that explains the data.
- **Alerts:** The RSR may be submitted with alerts. The data does not need to be fixed or explained with a comment.

Below the Missing Data Report is a summary of criteria used in running the report.

Missing Data Report - by Client					
ARIES ID	Client	Staff	Alerts	Warnings	Errors
100018660	Aames, Aaron	Van Dyke Roberta	OAMC Services without HAART Status; OAMC Services without Substance Abuse Screening; OAMC Services without Mental Health Screening;	OAMC Services without CD4 Test Dates;	
100020940	Alias, Adam A	O'Mara Mike	OAMC Services without Risk Reduction Screening; OAMC Services without Viral Load Test Dates; OAMC Services without PCP Prophylaxis Status; OAMC Services without HAART Status; OAMC Services without TB Screening; OAMC Services without Substance Abuse Screening; OAMC Services without Mental Health Screening;	Missing Poverty Level; OAMC Services without CD4 Test Dates;	
100021484	Alaton, Tricia J	O'Mara Mike	OAMC Services without TB Screening;		
100017854	Barry, Kris W		OAMC Services without PCP Prophylaxis Status; OAMC Services without HAART Status; OAMC Services without Substance Abuse Screening; OAMC Services without Mental Health Screening;	Missing Poverty Level;	
100017516	Bennett, Juana A	O'Mara Mike	Missing Enrollment Status; Age 90 or older; OAMC Services without Viral Load Test Dates; OAMC Services without PCP Prophylaxis Status; OAMC Services without HAART Status; OAMC Services without Substance Abuse Screening; OAMC Services without Mental Health Screening;	Missing Medical Insurance; OAMC Services without CD4 Test Dates;	
100017292	Bevel, Bailinda K		First OAMC Visit Date without OAMC Services;	Missing Housing Status; Missing Medical Insurance;	
100017102			First OAMC Visit Date without OAMC Services;	Missing Medical Insurance;	
100018928	Torres, Mamie D		OAMC Services without PCP Prophylaxis Status; OAMC Services without Substance Abuse Screening; OAMC Services without Mental Health Screening;	Missing Poverty Level; OAMC Services without CD4 Test Dates;	
100018811	Vang, Mollie J	O'Mara Mike	Missing Enrollment Status; Age 90 or older; OAMC Services without PCP Prophylaxis Status; OAMC Services without Substance Abuse Screening; OAMC Services without Mental Health Screening;	Missing Poverty Level; OAMC Services without CD4 Test Dates;	
100019322	Yolen, April A	Van Dyke Roberta	First OAMC Visit Date without OAMC Services;	Missing Medical Insurance;	
100019454	Young, Cindy A	Van Dyke Roberta	Missing HIV/AIDS Status;	Missing Poverty Level; Missing Housing Status; Missing Medical Insurance;	
100019272	Young, Katherine A	Van Dyke Roberta		Missing Medical Insurance;	
100019009	Zweig, Timothy W	O'Mara Mike	OAMC Services without Risk Reduction Screening; OAMC Services without PCP Prophylaxis Status; OAMC Services without HAART Status;	Missing Poverty Level; OAMC Services without CD4 Test Dates;	

Number of clients: 46

Notes

- The Missing RSR Data Report will *not* be available if the RSR is run at the AA or Partner level. For an Aggregate RSR report, results will *not* include a Missing RSR

Data Report, and the **Missing Data Report** download button will not display. In addition, when the Aggregate data for administrative agency checkbox is selected in RSR filters, the filters for Missing RSR Data Report are grayed out.

Completing the Missing Data

- Use the Client name link on the Missing Data Report to display the Contact Info screen, from which you can navigate to the missing data.
- Enter the missing data on all relevant screens; for example, supply the missing race and living situation data for this client on the Demographics tabs. Or, you may ask the client's Primary Staff person listed on the Missing Data Report to assist with gathering and entering the missing data on all relevant screens.

After Completing the Missing Data

Re-run the RSR Summary Report after the missing data has been supplied to be sure that it is complete. You may need to run the Missing RSR Data Report more than once, until all data is complete.

After reviewing the Reports



Results

Click [Export](#) to download an XML file of the report. Click [Report](#) to recalculate the data.

RSR Export

Missing Data Report

Select one of the following options:

	<p>Note: The RSR Export button is visible only for reports run on the current reporting period. For example, if the current period is 1/1/2014 - 12/31/2014, the button is visible only for that period.</p> <p>Click this button to export the RSR data file. A File Download window will open, prompting you to save the file in XML format (the only format provided) on your computer. This is the file for the report that will be uploaded through the EHB website.</p>
	<p>Click this button to export the missing data results. You are taken to a screen called "Export Results: Missing RSR Data Report" where you may select from a dropdown among the following formats: XML, Comma-Separated Values, Tab-Separated Values.</p> <p>Note: In aggregate report results for administrative agencies, this button does not display, and there is no Missing RSR Data Report at the bottom of the screen.</p>

Export Results: Missing RSR Data Report

Export Format XML ▼

Export

Select a format and click **Export**. The name of the export file appears, along with a **Download** button. Click the button to download to your computer.

Completeness Rates

The Completeness Rates tab indicates data quality by showing the Known Rate, Unknown Rate and Missing Rate for RSR client-level data elements.

#	Client Data Item	Required Clients for this Data Element	Clients with Known Value Reported		Clients with "Unknown" Value Reported		Clients with No Value Reported	
			#	%	#	%	#	%
2	Vital/Enrollment Status	46	39	84.78%			7	15.22%
4	Year of Birth	46	46	100.00%			0	0.00%
5	Ethnicity	46	39	84.78%			7	15.22%
65	Hispanic Subgroups	35	32	91.43%			3	8.57%
6	Race	46	40	86.96%			6	13.04%
69	Asian Subgroups	20	20	100.00%			0	0.00%
70	Native Hawaiian/Pacific Islander Subgroups	4	2	50.00%			2	50.00%
7	Current Gender	46	44	95.65%	2	4.35%	0	0.00%
8	Transgender Subcategory	0	0				0	
71	Sex at Birth	46	39	84.78%			7	15.22%
9	Income	46	25	54.35%			21	45.65%
10	Housing Status	46	19	41.30%			27	58.70%
12	HIV/AIDS Status	46	39	84.78%			7	15.22%
14	Risk Factor	46	35	76.09%	34	73.91%	0	0.00%
15	Health Insurance	46	16	34.78%			30	65.22%
16-45	Core Medical and Support Services Delivered	28	28	100.00%				
46	HIV-risk Reduction Screening	17	17	100.00%			0	0.00%
49	CD4 Test	17	2	11.76%			15	88.24%
50	Viral Load Test	17	6	35.29%			11	64.71%
51	Prescribed PCP Prophylaxis	17	17	100.00%			0	0.00%
52	Prescribed ART	17	17	100.00%			0	0.00%

Submitting the RSR Summary Report

After you have run the RSR Summary Report and Missing RSR Data Report several times and corrected the data as needed, the report is ready to submit to HAB. Complete the following steps:

1. Generate and export your RSR from ARIES.
2. If you don't know your registration code, contact your Grantee to mail a registration code to you.
3. Once you have your registration code, access the RSR Web System.
4. After accessing the RSR Web System:
 - o Select the "HAB RSR Web Application" option from the dropdown box.
 - o Select the Registration Form link from the login screen.
 - o Complete the registration form by entering your information. At the bottom of the form, enter your 3-5 digit registration code (provided by your Grantee).
 - o Click **Register** to confirm the information you entered is correct.
 - o Read and accept the "HAB Ryan White Services Reporting System Rules of Behavior."
 - o Follow the link to the Login Screen and log in.

5.7.2.1 Ryan White HIV/AIDS Services Summary Report (RSR) and RSR Validation Report (2015-16, 2017)

The Ryan White HIV/AIDS Program Services Summary Report (RSR) is a reporting requirement for most recipients of funding from the Ryan White Program beginning in 2009. The RSR - which is distinct from the Ryan White HIV/AIDS Program Annual Data Report (RDR) - is submitted to the HIV/AIDS Bureau (HAB) within the U.S. Department of Health and Human Services. The RSR consists of three reports: the Grantee Report, the Provider Report, and the Client Report. The Client Report, which ARIES can generate for you, is an electronic file containing a record for each client served with Ryan White funds during the reporting period.

The record includes the client's demographics, select medical data, lab results, and a summary of the Ryan White-funded services provided, but does not include any identifying information about the client such as name or date of birth. The report includes results only for clients who had a Ryan White funded service while being eligible for Ryan White at any time during the report period.

The RSR Validation Report results are geared to the data requirements of the RSR and display at the bottom of the Results screen. Before running the RSR, you can set the Validation Report portion to sort by client or by data element.

To access the RSR Report:

- On the Reports menu, click **Compliance Reports**, click the [Ryan White HIV/AIDS Services \(RSR\) Export \(2017\)](#) link, which takes you to the RSR Export/RSR Validation Report screen.

Ryan White HIV/AIDS Services (RSR) Export (2017)	Exports the Ryan White HIV/AIDS Services to an XML file (for 2017)
Ryan White HIV/AIDS Services (RSR) Export (2015-2016)	Exports the Ryan White HIV/AIDS Services to an XML file (for 2015-2016)
Ryan White HIV/AIDS Services (RSR) Export (2014)	Exports the Ryan White HIV/AIDS Services to an XML file (for 2014)
Ryan White HIV/AIDS Services (RSR) Export (2009-2013)	Exports the Ryan White HIV/AIDS Services to an XML file (for 2009-2013)

- **Note:** It is not uncommon for the RSR Report to have modified reporting requirements from year to year, as determined by HRSA/HAB, the Federal agency that has oversight of the Ryan White Program and its recipients' reporting obligations. Be sure to run the appropriate report for the calendar year that is required for your agency's Ryan White Program reporting.
- To report on years previous to 2017, from the Compliance Report menu, choose from: [Ryan White HIV/AIDS Services \(RSR\) Export \(2009-2013\)](#), [Ryan White HIV/AIDS Services \(RSR\) Export \(2014\)](#), or [Ryan White HIV/AIDS Services \(RSR\) Export \(2015-2016\)](#).

-

[Running Your RSR Report, Including your XML file generation, Completeness Rates & Validation Reports Simultaneously](#)

-

Ryan White HIV/AIDS Services (RSR) Export (2017)

Agency or Administrative Agency

Reporting Period
 From To

ARIES ID

RSR Validation Report

Include Medical Data

Sort By

Data Elements

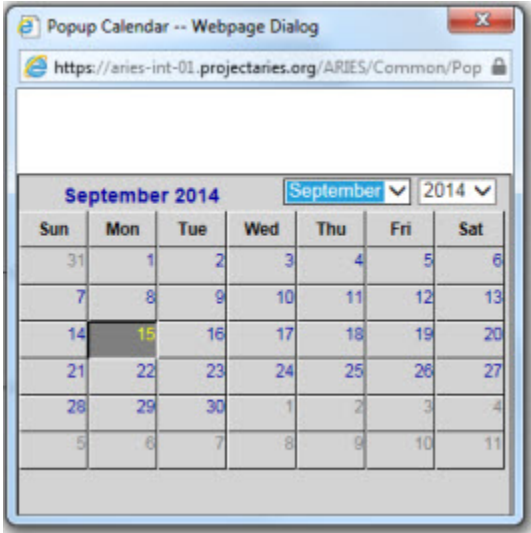
RSR Export Filters Section

Complete the RSR Export fields as follows:

Agency or Administrative Agency	By default, if you manage only one agency, its name appears on the title for the screen. To run the report for any one agency, select the agency from the dropdown.
Aggregate Data for Administrative Agency checkbox (visible only to administrative agency users)	<p>Aggregate Reporting by an Administrative Agency:</p> <p>If you administer multiple agencies and are running an aggregate RSR for an administrative agency, follow these additional steps.</p> <ul style="list-style-type: none"> • Before running the RSR, check this box to run the report for all the agencies you manage after selecting your agency from the Agency dropdown. <p>Note: For an Aggregate RSR report, results will <i>not</i> include a Missing RSR Data Report, and the Missing Data Report download button will not display. If you need to export an aggregate RSR, contact your ARIES System Administrator. This file will contain a single RSR for all of the agencies administered by your organization.</p> <p>RSR Reporting Requirements:</p> <p>The RSR reporting requirements specify that each provider must submit a separate RSR. There are very few, if any, instances in which HAB allows an aggregate RSR for multiple providers to be submitted. Prior to submitting an aggregate report, you must have permission from HAB. To create an export file containing an aggregate RSR, you must contact your ARIES support provider, who will run the report for you and send you the export file.</p>
Reporting Period	To report on the current period, leave the default unchanged. Alternatively, you may report on a different period by selecting it from the Report Period dropdown list. See below for custom date ranges.
From and To Dates	From the Reporting Period dropdown, choose a pre-set date range; or select "Input Custom Date Range."

Note: The custom date range fields and calendar icons are disabled unless "Input Custom Date Range" is selected from the dropdown. If a custom date range is selected from the dropdown, the date fields will clear, and the fields and icons will be disabled.

If you selected "Input custom date range" from the Reporting Period dropdown, fill in the dates in the "From" and "To" fields. Use the format MM/DD/YYYY. You can also use the pop-up calendar by clicking the calendar icon.



For each field, use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.

ARIES ID	Enter the ARIES ID in the text field. When you tab out of the field the Cleint name and date of birth will display to the right of the text box.
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RSR Validation Report Filters Section



The Validation Report will run concurrently with the RSR Report. Complete the Validation Report fields as follows.

Note: When the Aggregate data for administrative agency checkbox is selected in RSR filters, the filters for Missing RSR Data Report are grayed out.

Include Medical Data	Use the dropdown to select whether or not you wish to include medical data. The default is "Yes." If you do not want to include this data, select "No."
Sort by	Use the dropdown to select whether you want to sort by Client or Data Elements. The default is "Client." If desired, select "Data Elements" instead.
Data Elements	Use the dropdown to limit the report to a single data element or to run the report for all data elements. The default is "All Elements."

After completing the fields in the RSR Export and Validation Report sections:

Select one of the following:


	Click Report to run the RSR with the filters you have entered. Results display below the filters and include both the RSR Summary Report and the RSR Missing Data Report.
	Click Cancel to cancel the report settings. You are taken to your agency's RSR/RDR tab.

Results

The Results section includes a button to download an XML file of the RSR.

Results

Click Export to download an XML file of the report. Click Report to recalculate the data.



Summary

The Summary screen displays the agency name and reporting period at the top. Information displayed in the Summary includes the following: Provider Name, Report Period, Number of clients, number of clients with Outpatient/Ambulatory Medical Care Service, Enrollment status (with number of clients and percentage of total) and Age (with number of clients and percentage of total).

Summary		
Exports the Ryan White HIV/AIDS Services to an XML file (for 2015)		
Provider Name: Shasta Test Services		
Report Period: 1/1/2015 - 12/31/2015		
Number of clients: 56		
Number of HIV-Positive clients with Outpatient/Ambulatory Medical Care Service: 25		
Enrollment Status	Number of Clients	% of Total
<small>(RSR ID: 2) The client's vital enrollment status at the end of the reporting period.</small>		
Active, continuing in program	54	96.43%
Referred to another program or services, or self-sufficient	0	0.00%
Removed from treatment due to violation of rules	0	0.00%
Incarcerated	0	0.00%
Relocated	1	1.79%
Deceased	0	0.00%
Missing	1	1.79%
Age	Number of Clients	% of Total
<small>(RSR ID: 4) Number of clients, by RDR Age category at the end of the reporting period.</small>		
Less than 2 years	1	1.79%
02-12 years	0	0.00%
13-24 years	5	8.93%
25-44 years	30	53.57%
45-64 years	17	30.36%

Reviewing the RSR Summary Report

This report is provided for your information only, to let you know what's inside the data file that you will submit to HAB.

A Top of Page link is provided at the bottom of the report results for easy navigation.

This report can be printed using the browser print icon.

Notes

- Depending upon installation settings, the RSR may use either Family Income or Household Income to determine poverty level. This calculation switch is configurable at the installation level, with each ARIES installation having the ability to select which field is to be used for its RSR calculations.

If you have questions about the configuration, contact your ARIES administrator.

- The RSR allows only one pregnancy to be reported on the RSR, even though a client could have multiple ARIES pregnancy records that cover some portion of the reporting period.
- If the Agency Specifics enrollment date is AFTER the earliest service date within the report period, the enrollment date is reset to the earliest service date within the report period.
- For Hepatitis vaccination, if the data is not found to support a "Not Medically Indicated" or a "Yes" response, the system substitutes the default response of "No."
- Below the results table is the date and time the report was generated.

This report was based on data generated at 11/18/2016 6:44:29 AM.

Reviewing the RSR Validation Report

The RSR Validation Report runs concurrently with the RSR Report. Use this report to supply missing data by linking to the individual client's records via the client's name in the report. You may select an export format and the Validation Export button to export the report results in XML, text; comma separated or text; tab separated.

The RSR Validation Report displays at the bottom of the Results screen. The report identifies clients with missing RSR data for certain questions in the RSR, and the staff member who was responsible for completing the client's enrollment.

Client	Each row displays the name of the client as a link. Clicking on a link takes you to the client's Contact Info screen for that individual. From there, you can select the appropriate tab to locate the missing data. Note: If you had selected data elements to sort by, the screen would show "RSR Validation Report - by Data Element."
Staff	The client's primary Staff person, as indicated in the Staff Assignment section of the Programs tab. This Staff person might be able to assist with finding and entering any missing data.
Missing RSR Data	This is a list of the data items missing for the client, from all relevant screens. Depending on your sort criteria, the column will show either all elements, or the element you selected to sort by.

Missing data messages are sorted into three columns to indicate the importance of the data problem.

- Errors: Data must be fixed before the RSR can be submitted.
- Warnings: The RSR may be submitted with a comment that explains the data.
- Alerts: The RSR may be submitted with alerts. The data does not need to be fixed or explained with a comment.

Below the Validation Report is a summary of criteria used in running the report.

RSR Validation Report - by Client

Export Format

ARIES ID	Client	Staff	Alerts	Warnings	Errors
			<i>Verify the data before uploading, HAB will accept the data without an explanation</i>	<i>If possible, correct the data before uploading, otherwise HAB will require an explanation</i>	<i>The data cannot be uploaded, and the client will be excluded from the XML upload file</i>
100018860	Aames, Aaron	O'Mara Mike		<ul style="list-style-type: none"> Missing Housing Status OAMC Services without HAART Status 	
100020593	Abani, Job B	Analyst Albert	<ul style="list-style-type: none"> Hispanic Ethnicity without Subgroup Missing HIV Risk Factors 	<ul style="list-style-type: none"> Missing Housing Status 	
100019983	Alimentary, Alicia A	Analyst Albert	<ul style="list-style-type: none"> Missing Ethnicity 		
100021484	Alston, Tricia J	Analyst Albert	<ul style="list-style-type: none"> Missing Ethnicity 	<ul style="list-style-type: none"> OAMC Services without Viral Load Test Dates OAMC Services without HAART Status 	
100021013	Amina, Anka B	Analyst Albert	<ul style="list-style-type: none"> Hispanic Ethnicity without Subgroup Missing Asian Subgroup Missing Native Hawaiian/Pacific Islander Subgroup Service Visit Count exceeds Reporting Period 	<ul style="list-style-type: none"> OAMC Services without HAART Status 	
100018498	Andrews, Cemet H	Analyst Albert		<ul style="list-style-type: none"> OAMC Services without HAART Status 	
100020056	ATestool, Hiram S	Analyst Albert	<ul style="list-style-type: none"> Hispanic Ethnicity without Subgroup Missing HIV Risk Factors 	<ul style="list-style-type: none"> Missing Poverty Level OAMC Services without HAART Status 	
100021872	Barnett, Andrea R	Blake Betty	<ul style="list-style-type: none"> Missing Sex at Birth 		
100017136	Yang, Belinda K			<ul style="list-style-type: none"> Missing Housing Status Missing Medical Insurance OAMC Services without Viral Load Test Dates OAMC Services without HAART Status 	
100019017	Weasley, Ron B			<ul style="list-style-type: none"> OAMC Services without Viral Load Test Dates 	
100016518	Whitney, Queen L			<ul style="list-style-type: none"> Missing Housing Status Missing Medical Insurance 	
100021997	Wong, Marcia A	McCampbell Nancy	<ul style="list-style-type: none"> Missing Sex at Birth 	<ul style="list-style-type: none"> OAMC Services without Viral Load Test Dates 	
100022516	Zinger, Clara A	Van Dyke Roberta	<ul style="list-style-type: none"> Missing Sex at Birth 	<ul style="list-style-type: none"> Missing Housing Status 	

Number of clients: 52
 Criteria: Reporting Period Between 1/1/2015 and 12/31/2015 (Year - 2015, Period - 2, Agency - Shasta Test Services, Data Elements - All Elements), executed at 1/15/2016 1:01:51 PM

Completing the Missing Data

- Use the Client name link on the Missing Data Report to display the Contact Info screen, from which you can navigate to the missing data.
- Enter the missing data on all relevant screens; for example, supply the missing race and living situation data for this client on the Demographics tabs. Or, you may ask the client's Primary Staff person listed on the Missing Data Report to assist with gathering and entering the missing data on all relevant screens.

After Completing the Missing Data

Re-run the RSR Summary Report after the missing data has been supplied to be sure that it is complete. You may need to run the Missing RSR Data Report more than once, until all data is complete.

Completeness Rates

The Completeness Rates tab indicates data quality by showing the Known Rate, Unknown Rate and Missing Rate for RSR client-level data elements.

Completeness Rates

This table indicates the Known Rate, Unknown Rate, and Missing Rate for RSR client-level data elements. See your Completeness Report, downloadable from the EHB or the RSR System, for measure definitions. For a list of the clients who have incomplete data, click on the numbers in the Unknown or No Value columns.

#	Client Data Item	Required Clients for this Data Element	Clients with Known Value Reported		Clients with "Unknown" Value Reported		Clients with No Value Reported	
			#	%	#	%	#	%
2	Vital/Enrollment Status	56	55	98.21%			1	1.79%
4	Year of Birth	56	56	100.00%			0	0.00%
5	Ethnicity	56	51	91.07%			5	8.93%
65	Hispanic Subgroups	43	36	83.72%			7	16.28%
6	Race	56	52	92.86%			4	7.14%
69	Asian Subgroups	29	27	93.10%			2	6.90%
70	Native Hawaiian/Pacific Islander Subgroups	12	11	91.67%			1	8.33%
7	Current Gender	56	53	94.64%	3	5.36%	0	0.00%
8	Transgender Subcategory	6	6	100.00%			0	0.00%
71	Sex at Birth	56	36	64.29%			20	35.71%
9	Income	56	49	87.50%			7	12.50%
10	Housing Status	56	37	66.07%			19	33.93%
12	HIV/AIDS Status	56	54	96.43%			2	3.57%
14	Risk Factor	56	38	67.86%	18	32.14%	0	0.00%
15	Health Insurance	56	34	60.71%			22	39.29%

The completeness section allows users to get client details on each of the numbers in the "Clients with 'Unknown' Value Reported" and "Clients with No Value Reported" sections. Clicking on the underlined blue numbers in the report results in an overlay that displays a list of clients and their ARIESID associated with the specific row clicked.

Clients with "Unknown" Value Reported for Risk Factor	
Client Name	ARIES ID
Abani, Jeb R	100020593
Adam, Alias A	100020924
Anthony, Katrina A	100017185
Baby, Kid R	100020643
Banisterman, Jerry I	100014869
Beck, Nona C	100017177
Belmont, Leon S	100021575
Bentland, Robert G	100021260
Blugar, Belisario B	100020429
Brown, Beavis B	100022409
Carr, Cathy K	100018647
Cilia, Silvia K	100019488
Clam, Happy Q	100020023

Submitting the RSR Summary Report

After you have run the RSR Summary Report and Validation Report several times and corrected the data as needed, the report is ready to submit to HAB. Complete the following steps:

1. Generate and export your RSR from ARIES.
2. If you don't know your registration code, contact your Grantee to mail a registration code to you.
3. Once you have your registration code, access the RSR Web System.
4. After accessing the RSR Web System:
 - Select the "HAB RSR Web Application" option from the dropdown box.
 - Select the Registration Form link from the login screen.
 - Complete the registration form by entering your information. At the bottom of the form, enter your 3-5 digit registration code (provided by your Grantee).
 - Click **Register** to confirm the information you entered is correct.
 - Read and accept the "HAB Ryan White Services Reporting System Rules of Behavior."
 - Follow the link to the Login Screen and log in.

Note for 2017: The Ryan White Program's Service Hierarchy has been updated in ARIES to reflect the Primary Service scope administered by HRSA/HAB.

The following tables from the RSR report the updated Primary Service categories. All data is now reported using these values.

Core Medical Services	Total Visits
(RSR ID: 16-25) The number of visits received for each core medical service.	
Outpatient/Ambulatory Health Services	905
Oral Health Care	157
Early Intervention Services	317
Home Health Care	188
Home and Community-Based Health Services	379
Hospice Services	31
Mental Health Services	380
Medical Nutrition Therapy	125
Medical Case Management Services	388
Substance Abuse Services - Outpatient	532

Core Medical and Support Services	Total Clients
(RSR ID: 26-45) The number of clients served for each core medical or support service.	
AIDS Drug Assistance Program	8
Health Insurance Premium and Cost Sharing Assistance	19
Non-Medical Case Management Services	15
Child Care Services	6
Emergency Financial Assistance	6
Food Bank/Home-Delivered Meals	12
Health Education/Risk Reduction	3
Housing Services	23
Linguistic Services	3
Medical Transportation Services	9
Outreach Services	30
Psychosocial Support Services	11
Referral for Health Care/Supportive Services	13
Rehabilitation Services	5
Respite Care	7
Substance Abuse Services - Residential	16
Other Professional Services	13

5.7.4 WICY Report

The WICY report generates service data on your agency's women, infants, children, and youth, and displays the unduplicated client totals by gender and ethnicity.

To access the report:



- From the [ARIES menu bar](#) at the top of the ARIES screen, choose the **Report > Compliance** menu item to get to the Compliance Reports screen.
- Click the WICY link, which takes you to the Report Filter Values screen.

Report Filter Values

The Report Filter Values screen is the first screen you will see when you click on the report link.

Report Filter Values

WICY

Date of Service Between ▾ 5/1/2010  & 4/30/2011 

Limit Program to Ryan White Yes ▾

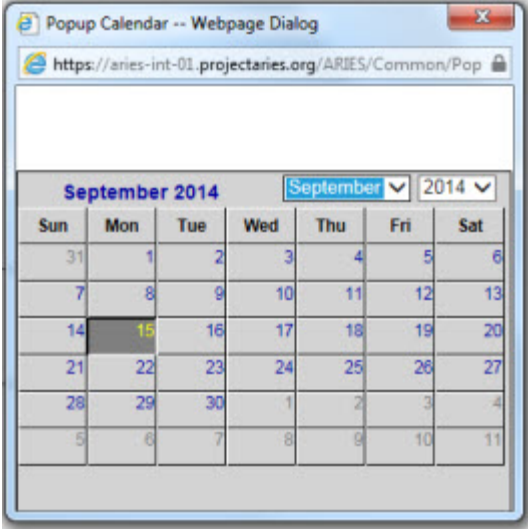


Limit Funding Source to Ryan White Yes ▾

Display 1000 results Display print format

[Report >](#) [Export](#)

Complete the fields as follows:

Date of Service	<p>Use the dropdown to select the type of filter for your report (e.g., On, Before, After, or Between)</p> <p>In the two date fields, enter the date filters for your report. The report will generate results for clients who have received services during the period you specify. If a client registered with your agency has not received services, they are not counted.</p> <ul style="list-style-type: none"> • To filter for records on a given day, select "On" from the dropdown list and enter a specific date, e.g. 6/23/2010, in the first text field. Leave the second text field empty. • Select "Before" to sort through all services before - but not on - that specific date. Enter the date in the first text field, e.g. 6/23/2010. This will retrieve service records before midnight on June 22, 2010. Leave the second text field empty • Select "After" to bring up all services after a specific date, including records dated that day. Enter the date in the first text field, e.g. 6/23/2010 and click Search to display all the records dated June 23, 2010 and all the days following it. Leave the second text field empty • To filter a range of dates, select "Between" from the dropdown list and enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all services that occurred from 12:00 AM on the first date to 11:59 PM on the second date. <p>Use the format MM/DD/YYYY. Example: For June 22, 2010 you would enter 06/22/2010.</p> <p>You can also use the calendar pop-up by clicking the calendar icon.</p>
------------------------	---

	 <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>Limit Program to Ryan White</p>	<p>Use the Yes/No dropdown to indicate whether you want to limit the results of the report to services assigned to the program "Ryan White."</p>
<p>Limit Funding Source to Ryan White</p>	<p>Use the Yes/No dropdown to indicate whether you want to limit the results of the report to services whose contract has Ryan White Part I-IV as the funding source.</p>
<p>Display</p>	<p>The number of records to display per screen. The default number is 1000. Type a different number if desired, with no commas.</p>
<p>Display print format checkbox</p>	<p>Select this checkbox to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.</p>
<p>After completing your selections, click on one of the following:</p>	
	<p>Click this button to view the report results.</p>
	<p>Click this button to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format. Refer to section 5.1.3, Exporting Reports, for details.</p>

Report Results

Clicking on the **Report >** button on the Filter Values screen displays the report results.

WICY Report Results													
Infants (0-1)													
Service Primary Category	Male	Female	Unknown Gender	White (not Hispanic)	Black or African American (not Hispanic)	Hispanic or Latino (a)	Asian	Native Hawaiian or Other Pacific Islander	American Indian or Alaskan Native	More than one race	Unknown/Unreported	Total Number Clients	Total Expenditure
Ambulatory/Outpatient Medical Care	0	0	1	0	0	0	0	0	0	1	0	1	324.00
Day or Respite Care for Adults	0	0	1	0	0	0	0	0	0	1	0	1	228.00
Total	0	0	2	0	0	0	0	0	0	2	0	2	552.00
Children (2-12)													
Service Primary Category	Male	Female	Unknown Gender	White (not Hispanic)	Black or African American (not Hispanic)	Hispanic or Latino (a)	Asian	Native Hawaiian or Other Pacific Islander	American Indian or Alaskan Native	More than one race	Unknown/Unreported	Total Number Clients	Total Expenditure
Ambulatory/Outpatient Medical Care	0	0	2	0	0	0	0	0	0	1	1	2	1,294.00
Oral Health Care	0	0	1	0	0	0	0	0	0	0	1	1	148.00
Substance Abuse Services Outpatient	0	0	1	0	0	0	0	0	0	0	1	1	297.00
Transportation Services	0	0	1	0	0	0	0	0	0	0	1	1	18.00
Total	0	0	5	0	0	0	0	0	0	1	4	5	1,757.00
Youth (13-24)													
Service Primary Category	Male	Female	Unknown Gender	White (not Hispanic)	Black or African American (not Hispanic)	Hispanic or Latino (a)	Asian	Native Hawaiian or Other Pacific Islander	American Indian or Alaskan Native	More than one race	Unknown/Unreported	Total Number Clients	Total Expenditure
Ambulatory/Outpatient Medical Care	1	1	0	0	0	0	0	0	0	2	0	2	695.00
Other Services	0	0	2	0	0	0	0	0	0	2	0	2	484.00
Residential or In-Home Services Care	0	0	1	0	0	0	0	0	0	0	1	1	340.00

The report results display in four tables;

- Infants (0-1 years of age)
- Children (1-12 years of age)
- Youth (13-24 years of age)
- Women (25 years of age and older)

Each table displays rows based on primary service category. The rows only display if a client received services from that primary service category. Example: If no infant clients received mental health services, that row will not display.

The columns of each table list the following:

- Service category
- The various ethnic groups (From left to right, they include: male, female, unknown gender, white, black, Hispanic, Asian, Native Hawaiian or other Pacific Islander, American Indian or Alaskan Native, those of mixed race (more than one), clients whose race is unknown)
- The total number of clients who received that category of service
- The total expenditure for that category of service

Note: If a client received multiple services within a category, they are still only counted once.

- The last row of each table lists the total number of unduplicated clients for each gender and ethnicity.

Note: As clients receive services from multiple categories and are only counted once, the sum of the rows may not equal the total listed.

Women (25+)													
Service Primary Category	Male	Female	Unknown Gender	White (not Hispanic)	Black or African American (not Hispanic)	Hispanic or Latino (a)	Asian	Native Hawaiian or Other Pacific Islander	American Indian or Alaskan Native	More than one race	Unknown/Unreported	Total Number Clients	Total Expenditure
AIDS Pharmaceutical Assistance (local)	0	5	0	3	0	0	0	0	0	1	1	5	7486.0000
Case Management (non-medical)	0	26	0	6	2	0	0	0	0	17	1	26	906.2600
Early Intervention Services (Parts A and B)	0	1	0	0	0	0	0	0	0	1	0	1	0.0000
Emergency Financial Assistance	0	9	0	4	0	0	0	0	0	4	1	9	2609.0000
Health Education/Risk Reduction	0	2	0	1	0	0	0	0	0	0	1	2	220.0000
Medical Case Management (including Treatment Adherence)	0	17	0	7	2	0	0	1	0	6	1	17	2453.5800
Medical Nutrition Therapy	0	2	0	1	0	0	0	0	0	1	0	2	90.0000
Medical Transportation Services	0	1	0	0	0	0	0	0	0	1	0	1	15.0000
Mental Health Services	0	1	0	1	0	0	0	0	0	0	0	1	60.0000
Other Services	0	1	0	0	0	0	0	0	0	0	1	1	0.0000
Outpatient/Ambulatory Medical Care	0	27	0	7	0	0	0	1	0	15	4	27	5119.0000
Substance Abuse Services - Outpatient	0	2	0	1	1	0	0	0	0	0	0	2	152.0000
Treatment Adherence Counseling	0	1	0	0	0	0	0	0	0	1	0	1	0.0000
Total	0	67	0	19	4	0	0	1	0	37	6	67	19110.8400
Total WICY Expenditure: \$22,266.90 Generated 5/11/2011 2:45:11 PM Criteria: Service Line Item Service Date BETWEEN '5/1/2010' AND '4/30/2011' AND Filter 2 IN ('Yes') AND Filter 3 IN ('Yes')													

[Export](#)

On the bottom left of the screen underneath the last table, the following appears:

- Total dollar amount of WICY expenditures for all infants, children, youth and women for that time period
- The date and time the report was generated
- The filter parameters

To Include These Tables in a Report Document

- Click and drag your mouse to highlight the tables
- Select Edit > Copy from the Internet Explorer menu
- From within your report document, select Edit > Paste from the menu to insert your table.

Note: In applications like Microsoft Word and Excel, the table formatting is preserved.

To exit the Reports Results Screen:

Export	Clicking the Export button on the Results page takes you back to the Filter Values screen. Use the Export button on that page, not on the Results page, to export your data .
< Back	Click this link in the menu bar to return to the Report Filter Values screen.

5.7.5 HOPWA Progress Report Data and HOPWA Missing Data

Click [here](#) for information about the HOPWA Missing Data Report.

The HOPWA Progress Report Data is for the use of State, County (AA) and Provider agencies and is run throughout the year to monitor HOPWA data. It is used as a basis to compile the report which is submitted to HUD.

The HOPWA Progress Report Data (PRD) provides annual performance reporting on client outputs and outcomes to assess grantee performance in achieving the housing stability outcome measure. HUD uses this data to obtain essential information on such items as grant activities and project sponsors, for monitoring and evaluation purposes.

An additional Funding Source dropdown has been added to the PRD Wizard screen. If the dropdown is left blank, the report will not be filtered by Funding Source. If the value is selected, the report will include only services where the Funding Source matches the selected value.

To Access the Report

To access HOPWA Progress Report Data, on the Reports menu:

- Click **Compliance Reports**. On the Compliance Reports menu, click the **HOPWA Progress Report Data** link. This takes you to the Progress Report Data Filters screen.

HOPWA Progress Report Data Filters Screen

Setting report filters:

HOPWA Progress Report Data

Agency

Funding Source

Contract

Start Date

End Date

Missing Data Report

Sort By

Data Elements

Complete the parameters fields as follows:



For HOPWA Progress Report Data:

Agency	Use the dropdown to select the agency.
Funding Source	Use the dropdown to select the funding source. Or leave blank to report all funding sources for the agency.
Contract	Use the dropdown to select a contract. Or leave blank to report all contracts for the agency.
Start Date	The starting date of the report. You may also use the calendar icon.
End Date	The Ending date of the report. You may also use the calendar icon.

For the Missing Data Report:

Sort By	Use the dropdown to indicate whether to sort the results by client or by data element.
Data Elements	Use the dropdown to select the data elements or date, or leave at the default "All Elements."

When you have selected your filters:

	Click this button to run the report and display the results.
	Click this button to display the options for opening or saving the data in XML, text comma-separated, or text tab-separated format.

Note

- Please also refer to the detailed description for each section of the Report.

HOPWA Progress Report Data

Agency: Denean & Company

All Funding Sources

All Contracts

Reporting period: 07/01/2017 to 06/30/2018

Planning Estimate of Area's Unmet Needs for HOPWA-Eligible Households

1. Total number of households that have unmet housing subsidy assistance	0
2. From the total reported in Row 1, identify the number of households with unmet housing needs by type of housing subsidy assistance	
a. Tenant-Based Rental Assistance (TBRA)	0
b. Short-Term Rent, Mortgage and Utility payments (STRMU)	0
Assistance with rental costs	0
Assistance with mortgage payments	0
Assistance with utility costs	0
c. Housing Facilities, such as community residences, SRO dwellings, other housing facilities	0

Individuals Served with Housing Subsidy Assistance

Number of individuals with HIV/AIDS who qualified their household to receive HOPWA housing subsidy assistance.	0
--	---

Homeless Individual Summary

Category	Number of Homeless Veteran(s)	Number of Chronically Homeless
Number of individuals with HIV/AIDS who qualified their household to receive HOPWA housing subsidy assistance.	0	0

Prior Living Situation

Category	Total HOPWA Eligible Individuals Receiving Housing Subsidy Assistance
1. Continuing to receive HOPWA support from the prior operating year	0
New Individuals who received HOPWA Housing Assistance support during Operating Year	
2. Place not meant for human habitation (such as a vehicle, abandoned building, bus/train/subway station/airport, or outside)	0
3. Emergency shelter (including hotel, motel, or campground paid for with emergency shelter voucher)	0
4. Transitional housing for homeless persons	0
5. Total number of new Eligible Individuals who received HOPWA Housing Subsidy Assistance with a Prior Living Situation that meets HUD definition of homelessness (Sum of Rows 2 - 4)	0
6. Permanent housing for formerly homeless persons (such as Shelter Plus Care, SHP, or SRO Mod Rehab)	0
7. Psychiatric hospital or other psychiatric facility	0
8. Substance abuse treatment facility or detox center	0
9. Hospital (non-psychiatric facility)	0
10. Foster care home or foster care group home	0
11. Jail, prison or juvenile detention facility	0
12. Rented room, apartment, or house	0
13. House you own	0
14. Staying or living in someone else's (family and friends) room, apartment, or house	0
15. Hotel or motel paid for without emergency shelter voucher	0
16. Other	0
17. Don't Know or Refused	0
18. TOTAL Number of HOPWA Eligible Individuals (sum of Rows 1 and 5-17)	0

Total Number of Beneficiaries Served with HOPWA Housing Subsidy Assistance

Individuals and Families Served with HOPWA Housing Subsidy Assistance	Total Number
1. Number of individuals with HIV/AIDS who qualified the household to receive HOPWA housing subsidy assistance (equals the number of HOPWA Eligible Individuals reported in Part 7A, Section 1, Chart a.)	0
2. Number of ALL other persons diagnosed as HIV positive who reside with the HOPWA eligible individuals identified in Row 1 and who benefitted from the HOPWA housing subsidy assistance	0
3. Number of ALL other persons NOT diagnosed as HIV positive who reside with the HOPWA eligible individual identified in Row 1 and who benefitted from the HOPWA housing subsidy	0
4. TOTAL number of ALL beneficiaries served with Housing Subsidy Assistance (Sum of Rows 1,2,3)	0

Age and Current Gender

HOPWA Eligible Individuals (Chart a, Row 1)						
	A.	B.	C.	D.	E.	F.
	Male	Female	Transgender M to F	Transgender F to M	Other	Total (Sum of Columns A-E)
1. Under 18	0	0	0	0	0	0
2. 18 to 30 years	0	0	0	0	0	0
3. 31 to 50 years	0	0	0	0	0	0
4. 51 years and older	0	0	0	0	0	0

HOPWA Missing Data Report

Missing Data Report - by Client		
Client	Staff	Missing Data
Dougan, Doug		Assessment Part 1: Missing All Data Elements; Assessment Part 3: Missing All Data Elements; Eligibility: HIV Letter of Diagnosis; Hispanic Ethnicity; Household Status: No Status Data; Income: No income or asset data; Marital Status; Race; Residence: No residence record; Sexual Orientation; Veteran;
Dwaddle, Delbert		Eligibility: HIV Letter of Diagnosis; Household Status: Housing Plan Counseling; Household Status: Housing Plan Primary Care; Household Status: Housing Plan Insurance; Household Status: Housing Plan Income Qualification; Household Status: Housing Plan Income Producing;
Number of clients: 2		
<i>Criteria: Reporting Period Between 2013-07-01 and 2014-06-30 (Agency - Shasta Test Services, Data Elements - All Elements)</i>		

The Missing Data Report screen displays the following information:

Client	Each row displays the name of the client as a link. Clicking on a link takes you to the client's Contact Info screen for that individual. From there, you can select the appropriate tab to locate the missing data. Note: If you had selected data elements to sort by, the screen would show "Missing Data Report - by Data Element."
Staff	The client's primary Staff person, as indicated in the Staff Assignment section of the Programs tab. This Staff person might be able to assist with finding and entering any missing data.
Missing Data	This is a list of the data items missing for the client, from all relevant screens. Depending on your sort criteria, the column will show either all elements, or the element you selected to sort by.

Completing the Missing Data

- Use the Client name link on the Missing Data Report to display the Contact Info screen, from which you can navigate to the missing data.
- Enter the missing data on all relevant screens; for example, supply the missing eligibility data for the client on the Assessment screens. Or, you may ask the client's Primary Staff person listed on the Missing Data Report to assist with gathering and entering the missing data on all relevant screens.

After Completing the Missing Data

Re-run the HOPWA Progress Report Data after the missing data has been supplied to be sure that it is complete. You may need to run the report more than once, until all data is complete.

5.7.6 Share Status Change Report

When you run the Share Status Change Report, ARIES displays a log of share status changes by client. A change in share status occurs when the "Agrees to Share Data" field on the Agency Specifics Edit screen is updated from "Yes" to "No" or vice versa.

Regarding changes from "No" to "Yes," it is important to remember that some data, regardless of a client's share status, is never shared across agencies. Examples are substance abuse, mental health, legal, and incident report information.

To run the report, go to Reports > Compliance and click the link for Share Status Change Report. The Filter Values screen for this report will appear.

Report Filter Values

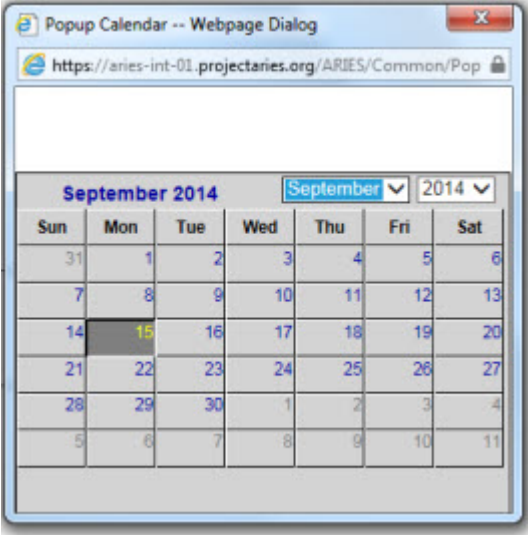
Report Filter Values
Share Status Change Report




Share Change Date [dropdown] [date field] [calendar icon] & [date field] [calendar icon]

Display [1000] **results** Display print format

Report > **Export**

Complete the fields as follows.

<p>Share Change Date dropdown</p>	<p>Select an operator: On, Before, After, or Between.</p> <p>Note: Do not select "Is Null" or "Is Not Null" from the dropdown. "Is Null" would produce 0 results and "Is Not Null" would produce every single Share Status Change; therefore, neither selection would produce meaningful results for the report.</p>
<p>Date fields</p>	<p>If you selected "On," "Before" or "After" from the Share Change Date dropdown, you need complete only one date field. Type the date in the window with format MM/DD/YYYY. Or use the popup calendar.</p>  <p>Use the dropdown lists to select the month and year, then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>

	<p>If you selected "Between" from the Share Change Date dropdown, you will need to complete both date fields with the "from" and "to" dates.</p>								
<p>Display print format</p>	<p>The following is a comparison of effects when this checkbox is checked and unchecked:</p> <table border="1" data-bbox="500 401 1409 884"> <thead> <tr> <th data-bbox="500 401 808 464">Checked</th> <th data-bbox="808 401 1409 464">Unchecked</th> </tr> </thead> <tbody> <tr> <td data-bbox="500 464 808 562">Main menu options not visible at top.</td> <td data-bbox="808 464 1409 562">Main menu options visible at top.</td> </tr> <tr> <td data-bbox="500 562 808 688">Export button not visible at bottom of results.</td> <td data-bbox="808 562 1409 688">Export button visible at bottom of results.</td> </tr> <tr> <td data-bbox="500 688 808 884">"Return to Management Reports" link visible at bottom of results.</td> <td data-bbox="808 688 1409 884">"Return to Management Reports" link not visible at bottom of results.</td> </tr> </tbody> </table>	Checked	Unchecked	Main menu options not visible at top.	Main menu options visible at top.	Export button not visible at bottom of results.	Export button visible at bottom of results.	"Return to Management Reports" link visible at bottom of results.	"Return to Management Reports" link not visible at bottom of results.
Checked	Unchecked								
Main menu options not visible at top.	Main menu options visible at top.								
Export button not visible at bottom of results.	Export button visible at bottom of results.								
"Return to Management Reports" link visible at bottom of results.	"Return to Management Reports" link not visible at bottom of results.								
	<p>Click this button to display the Share Status Change Report.</p>								
	<p>When you click this button, a dialog appears which gives you the option of saving the data in XML format, as comma-separated text, or tab-separated text.</p> <div data-bbox="500 1150 1304 1339" style="border: 1px solid black; padding: 10px; text-align: center;"> <p>Export Results: Share Status Change Report</p> <p>Export Format <input type="text" value="XML"/></p> <p></p> </div> <p>Choose a format from the dropdown and click Export again. The report is then saved in the selected format. You are prompted to click the Download button, which now appears on your screen, to save the file to your computer.</p> <p>If you used the Table option, there will be a separate button for each table within your report, and you must download each one separately.</p>								

The Share Status Change report displays the following columns.

Share Status Change Report			
Client Name	Shared	Date Changed	Agency Name
6y1vyyyyyyyy, Dvvyv	Yes	03/09/2009	4810 - San Angelo AIDS Foundation
Aguirre, Chrystal	No	03/04/2010	Shasta Services
Allison, Leroy	No	02/01/2010	Shasta Services
Ashley, Rory	No	02/24/2010	Shasta Services
Axa, Jxn	Yes	07/16/2009	4816 - Harris County Hospital District
Axa, Jxn	Yes	07/16/2009	4816 - Harris County Hospital District
Axaxx, Bxnxxx	Yes	07/16/2009	4814 - Health Horizons of East Texas
Axaxx, Dxmxxxx	No	07/20/2009	4816 - AIDS Foundation Houston
Axaxx, Ixoxxxx	No	04/02/2009	4804- Dallas County Hospital District
Axaxx, Ixoxxxx	Yes	04/02/2009	4804- Dallas County Hospital District
Axaxx, Ixoxxxx	No	04/02/2009	4804- Dallas County Hospital District
Axaxx, Ixoxxxx	Yes	04/02/2009	4804- Dallas County Hospital District
Axaxx, Kixxx	No	03/06/2009	4816 - Harris County Hospital District
Axaxx, Kixxx	Yes	03/23/2009	4816 - AIDS Foundation Houston
Axaxx, Kixxx	No	03/06/2009	4816 - Harris County Hospital District
Axaxx, Kixxx	Yes	03/23/2009	4816 - AIDS Foundation Houston
Axaxx, Kixxx	Yes	05/26/2009	4816 - AIDS Foundation Houston
Axaxx, Kixxx	Yes	03/09/2009	4824 - Tarrant County Hospital District - BPS

Client Name	The name of the client whose share status has changed in the report period.
Shared	The client's current share status (Yes/No).
Date Changed	The date on which the client's share status was changed.
Agency Name	The agency serving the client.

Note that some clients are listed more than once on the report. There are several possible reasons. For example, the client may be served by more than one agency and may have chosen a non-share status with one agency and a share status with another. Or, if the client has a non-share status with both agencies, each agency will maintain separate records for the client. If the client is listed twice with the same agency, it is possible that the client's records are duplicated.

<p>125 records, generated 7/18/2011 1:48:45 PM</p> <p>Criteria: Filter 1 > '1/1/2011'</p> <p style="text-align: right;">Export</p>
--

The bottom of the table displays the number of records and the time and date of the report display, and the filters specified in the previous screen.

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

5.7.7 HAB QM Indicators Report - Filters

- For details on the QM Client Follow-Up Report, click [here](#).
- For details on the All Client Export, click [here](#).
- To view a reference table of HAB QM Indicators calculations, click [here](#).


HAB QM Filters

With the HAB QM Indicators Report, ARIES incorporates agency performance indicators created by the HIV/AIDS Bureau (HAB) to measure clinical care, medical case management, oral health and AIDS Drug Assistance Programs. In running a report, users may select the measures most important to their agencies and the populations they serve. A report can be run by an individual agency; or an administrative agency can run aggregate data for all of the agencies it administers.

The HAB QM Indicators Report identifies a population that meets certain criteria related to standards of care. When run as the aggregate at the AA or Partner level, this includes any clients enrolled at any agency managed by the AA or Partner agency. This client filter is universal to all ARIES reports and cannot be changed. Within this population, a client must have had a service - any service- during the reporting period at your agency. When run at the AA or Partner level, this filter includes clients who received any service within the reporting period at any of the agencies the AA manages, or at any user-defined subgroup of managed agencies. This group of clients may be further filtered based on the following criteria.

- Service: Funding Source
- Service: Program
- Service: Contract
- Service: Primary Service

HAB QM Indicators Filters

Reporting Period End Date 

Agency or Administrative Agency ▼

▼ Funding Source

Available	>>	<<	Selected
AAA Custom agency	>>	<<	CA State Office of AIDS
Bill Gates Foundation	>>	<<	
CDC	>>	<<	
City GF	>>	<<	

▼ Contract

Available	>>	<<	Selected
2015 Ryan White Part B for Outpatient Amt	>>	<<	Part C 2017 RW
C33 Medi-Cal Waiver Program	>>	<<	
C34 Medi-Cal Waiver Program	>>	<<	
C43 Medi-Cal Waiver Program 2014 - 2016	>>	<<	

▸ Program

▼ Primary Service

Available	>>	<<	Selected
Administrative Expenses	>>	<<	Outpatient/Ambulatory Health Services
AIDS Drug Assistance Program	>>	<<	Medical Case Management Services
AIDS Pharmaceutical Assistance	>>	<<	
AIDS Pharmaceutical Assistance (local)	>>	<<	

▸ Staff Assignment

By default, the filter includes all Funding Sources, all Contracts, all Programs, and all Primary Services, but if you select a particular Contract (or set of Contracts) as a filter, then the report will only include clients enrolled at your agency who had a service during the period of the measure where that service was entered under the Contract(s) selected.

Please note that by default, clients are included regardless of Staff Assignment, but if you choose, the report can be limited to certain staff names being used in one or more of the four staff assignment levels.

Reporting criteria that impacts Performance Measures' Denominators and Numerator as well as report output:

- Consider CD4 and Viral Load tests as Medical Services**
- Include Shared data in the Numerator**
- Include Client Names in All Clients Export**

By default, Consider CD4 and Viral Load tests as Medical Services is checked. This will combine Outpatient/Ambulatory Health Services (OAHS) dates and CD4/Viral Load lab result dates in the Medical Services criteria of the measures' Denominator. Unchecked for OAHS dates only.

Include Shared data in the Numerator is also checked by default. When checked, shared data collected by another agency will be included in the measure's Numerator if the data meets the appropriate criteria for the measure. Unchecked will measure the data from the reporting agency only.

Include Client Names in All Clients Export is not checked by default. Checking this option will automatically display clients' names in the All Clients Export output.

Denominator

The Denominator of each HAB Quality Measurement is based on criteria defined by HAB (except where noted). A typical Denominator might be "Clients who received a Medical Visit during the reporting period." Several measures have the same Denominator filter, others have different filters. For example, the Cervical Cancer Screening measure includes only Female clients. A full description of the HAB QM Indicators is available [here](#).

There are two filter choices for the Denominator: Default and Custom

<p><input type="radio"/> Use default HAB Denominator for EACH measures</p> <p><input type="radio"/> Use custom Denominator for ALL measures</p>

If a custom filter is selected, it will be applied to all the measures selected for that report. You may select multiple measures for a report.

Please note that as discussed above, each measure may have a different default Denominator, but choosing to apply a custom filter, applies the custom filter to all of the selected measures.

Data elements available for a custom Denominator filter will be:

- Visit Type
- Age
- Gender
- Race
- Poverty Level
- County
- Geographic Area/HSDA
- Enrollment Status (end of period)
- HIV Exposure Category

Please note that for Visit Type, services at other agencies are included for Share clients.

Use **default** HAB Denominator for EACH measures
 Use **custom** Denominator for ALL measures

▼ **Visit Type**

Available		Selected
Medical Oral Health Medical Case Management	>> <<	

► **Client Age Between**

▼ **Current Gender**

Available		Selected
Male Female Transgender MTF Transgender FTM	>> <<	

► **Race**

► **HIV Exposure**

▼ **Household Poverty Level Between**

and

► **County**

► **Geographic Area/HSDA**

► **Current Agency Enrollment Status**

Numerator

The numerator for each measure is based on criteria defined by HAB (except where noted), is different for each measure and cannot be changed. However, since the Numerator is a subset of the Denominator, any custom filters applied (Primary Service, Demographics), also apply to the Numerator. That is, when you enter a Custom Filter, you are replacing the default Denominator filter and adding to the Numerator filter. A full description of the HAB QM Indicators is available [here](#).

Running the Report

To navigate to the HAB QM Indicators Report, click Reports > Compliance > HAB QM Indicators Report. The HAB QM Indicators Filters screen appears.

HAB QM Indicators Filters

Reporting Period End Date 

Agency or Administrative Agency

Funding Source

Contract

Program

Primary Service

Staff

- Consider CD4 and Viral Load tests as Medical Services**
- Include Shared data in the Numerator**
- Include Client Names in All Clients Export**

- Use default HAB Denominator for EACH measures**
- Use custom Denominator for ALL measures**

Contract

Client Age Between

Gender

Race

HIV Exposure

Household Poverty Level Between

County

Geographic Area/HSDA

Current Agency Enrollment Status

- Ignore Indicator Exclusions**

HAB QM Indicators - Measures

Core Measures[\(Select All\)](#)

Performance Measures	Measure Description	Period
<input type="checkbox"/> Gap in Medical Visits	Percentage of HIV-positive clients who had a medical visit in the first and last half of the year	One Year
<input type="checkbox"/> Medical Visits Frequency	Percentage of HIV-positive clients who had at least one medical visit in each six-month period where the visit was more than 60 days apart from visits in other 6 month periods	Two Years
<input type="checkbox"/> Viral Load Suppression	Percentage of HIV-positive clients whose most recent viral load is less than 200 copies/ml	One Year
<input type="checkbox"/> Prescribed Antiretroviral Therapy	Percentage of HIV-positive clients who were prescribed antiretroviral therapy	One Year
<input type="checkbox"/> PCP Prophylaxis	Percentage of HIV-positive clients who were prescribed Pneumocystis jiroveci pneumonia (PCP) prophylaxis	One Year

All Ages Measures[\(Select All\)](#)

Performance Measures	Measure Description	Period
<input type="checkbox"/> TB Screening	Percentage of HIV-positive clients who were screened for tuberculosis at least once since diagnosis	One Year

Filters Overview

The HAB QM Report is designed to give users maximum flexibility for customizing the denominators for the indicators.

At a minimum, you must select a 'Report End Date' and an 'Agency or Administrative Agency'. If you do not change the values, the report will run with the parameters defined by HAB. If you select any of the filters and parameters described below, the changes will be applied to the denominator. For example, HAB includes all Genders in the Housing Status measure, but only women in the Cervical Cancer Screening. If you run this indicator and left the Current Gender filter unchanged, Housing Status results would include all genders and Cervical Cancer Screening would be limited to female (and FTM) clients.

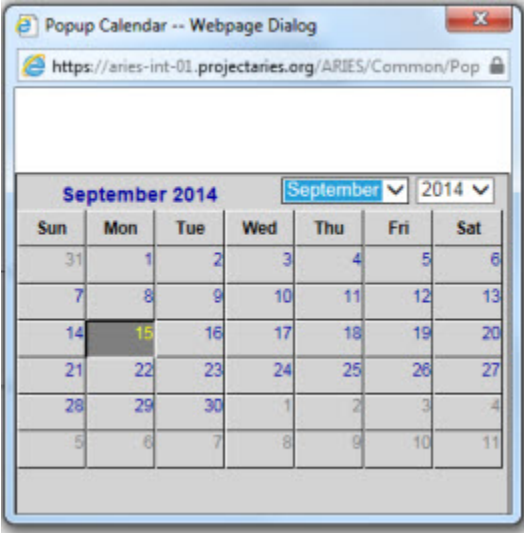
You will need to select a radio button for either "Use default HAB denominators for EACH measure" or "Use custom denominators for ALL measures." Note that all filters below these radio buttons apply only to the 'custom' radio selection. When the 'default' radio button is selected, the filters below the radio buttons are ignored.

<input type="radio"/> Use default HAB Denominator for EACH measures <input type="radio"/> Use custom Denominator for ALL measures
--

As long as you do not log out, ARIES will remember the custom filters for the session.

Filters Values

Select your report filters as follows.


<p>Report End Date</p>	<p>This is the End Date of the reporting period. All indicators use a one year period except Medical Visits Frequency, which uses two years. The default End Date is today's date but you can select any date.</p> <p>Type dates in format MM/DD/YYYY. You can also use the calendar pop-up by clicking the calendar icon.</p> 
<p>Agency or Administrative Agency</p>	<p>Select your agency from the dropdown list. For Admin Agencies, the dropdown includes the names of all agencies that the user manages.</p>


Funding Source	To filter your report by a specific funding source that paid for a service, make a selection from this dropdown. If no selection is made, the report includes all services regardless of the funding sources that paid for the services.
Contract	One or more contracts may be selected. The list of contracts is restricted based on selected Agency, Funding Source, and Reporting period.
Program	To filter your report by one or more programs through which a service was provided, make a selection from this dropdown. If no selection is made, the report includes all programs applicable to the reporting agency.
Primary Service	One or more primary services may be selected. The list of primary services will be restricted based on Agency, Contract and Programs associated with the Contract.
Staff Assignment	One or more staff members may be selected. By default, clients are included regardless of Staff Assignment, but if you choose, the report can be limited to certain staff names.
Use default HAB Denominator for EACH Measure	When selected, all filters below this radio button are disabled.
Use custom Denominator for ALL measures	When selected, all filters below this radio button are enabled.
Visit Type	Visit Type choices include Medical, Oral Health and Medical Case Management. Select the visit type you are interested in filtering on.
Client Age Between	You may enter a To and From age return clients in the desired age range.
Gender	One or more genders may be selected. Options include Male, Female, Transgender MTF and Transgender FTM, Other, Unknown and Client Refused to Report.
Client Race with Hispanic	One or more races may be selected. Options are White (Not Hispanic), Black (Not Hispanic), Hispanic or Latino(a), Asian, Native Hawaiian or Other Pacific Islander, American Indian or Alaskan Native, More than one race and Unknown/Unreported.
HIV Exposure	One or more HIV exposure (risk factors) categories may be selected.
Household Poverty Level Between	You may enter a To and From value.

County	One or more counties may be selected.
Geographic Area/HSDA	One or more geographic areas may be selected.
Current Agency Enrollment Status	This is the client's enrollment status at the end of the reporting period. One or more enrollment statuses may be selected.
Ignore Indicator Exclusions	When this checkbox is checked, the 'Exclusions' for the indicators will be ignored.

Services Filters



HAB QM Indicators Filters

Reporting Period End Date 



Agency or Administrative Agency 

Aggregate data for Administrative Agency



▼ Funding Source

Available		Selected
<div style="border: 1px solid #ccc; padding: 2px;"> Bill Gates Foundation CA State Office of AIDS CDC City GF </div>	 	



▼ Contract

Available		Selected
	 	



▼ Program

Available		Selected
	 	

▼ Primary Service

Available		Selected
	 	

▼ Staff Assignment

Available		Selected
<div style="border: 1px solid #ccc; padding: 2px;"> Admin, Sys Admin, System Administrator, System Barnes, Samantha </div>	 	

Denominator Filters

▼ Visit Type		
Available Medical Oral Health Medical Case Management	>> <<	Selected []
▼ Client Age Between		
[] and []		
▼ Current Gender		
Available Male Female Transgender MTF Transgender FTM	>> <<	Selected []
▼ Race		
Available White (not Hispanic) Black (not Hispanic) Hispanic or Latino(a) Asian	>> <<	Selected []
▼ HIV Exposure		
Available Men who have sex with men (MSM) Injection drug user (IDU) Men who have sex with men and injection drug u Hemophilia/coagulation disorder	>> <<	Selected []
▼ Household Poverty Level Between		
[] and []		
▼ County		
Available Anderson Alameda Alpine Andrews	>> <<	Selected []
▼ Geographic Area/HSDA		
Available 4801-Lubbock 4802-Arlington 4803-Arlington 4804-Tyler	>> <<	Selected []
▼ Current Agency Enrollment Status		
Available Active Inactive Lost to Follow-Up Disenrolled	>> <<	Selected []

Indicators

The current QM indicators are grouped into categories with a 'Select All' option. The description of the [HAB QM Indicators](#) includes a definition for each measure, a description of each numerator and denominator and a list of any and all exclusion that apply to the indicator. Indicators are grouped into categories with a 'Select all' option for each section. After you have chosen your desired options, select **Report** to run the HAB QM Summary Report.

HAB QM Indicators - Measures

Core Measures([Select All](#))

Performance Measures	Measure Description	Period
<input type="checkbox"/> Gap in Medical Visits	Percentage of HIV-positive clients who had a medical visit in the first and last half of the year	One Year
<input type="checkbox"/> Medical Visits Frequency	Percentage of HIV-positive clients who had at least one medical visit in each six-month period where the visit was more than 60 days apart from visits in other 6 month periods	Two Years
<input type="checkbox"/> Viral Load Suppression	Percentage of HIV-positive clients whose most recent viral load is less than 200 copies/ml	One Year
<input type="checkbox"/> Prescribed Antiretroviral Therapy	Percentage of HIV-positive clients who were prescribed antiretroviral therapy	One Year
<input type="checkbox"/> PCP Prophylaxis	Percentage of HIV-positive clients who were prescribed Pneumocystis jiroveci pneumonia (PCP) prophylaxis	One Year

All Ages Measures([Select All](#))

Performance Measures	Measure Description	Period
<input type="checkbox"/> TB Screening	Percentage of HIV-positive clients who were screened for tuberculosis at least once since diagnosis	One Year

Adolescent/Adult Measures([Select All](#))

Performance Measures	Measure Description	Period
<input type="checkbox"/> Cervical Cancer Screening	Percentage of HIV-positive female clients who had a Pap screening	One Year
<input type="checkbox"/> Chlamydia Screening	Percentage of HIV-positive clients who were screened for chlamydia	One Year
<input type="checkbox"/> Gonorrhea Screening	Percentage of HIV-positive clients who were screened for Gonorrhea	One Year
<input type="checkbox"/> Hepatitis B Screening	Percentage of HIV-positive clients who were screened for hepatitis B at least once since diagnosis	One Year
<input type="checkbox"/> Hepatitis B Vaccination	Percentage of HIV-positive clients who completed the vaccination series for hepatitis B	One Year
<input type="checkbox"/> Hepatitis C Screening	Percentage of HIV-positive clients who were screened for hepatitis C at least once since diagnosis	One Year
<input type="checkbox"/> Oral Exam	Percentage of HIV-positive clients who received an oral exam by a dentist	One Year
<input type="checkbox"/> Pneumococcal Vaccination	Percentage of HIV-positive clients who ever received pneumococcal vaccine	One Year
<input type="checkbox"/> Syphilis Screening	Percentage of HIV-positive clients who were screened for syphilis within the year	One Year

Medical Case Management Measures([Select All](#))

Performance Measures	Measure Description	Period
<input type="checkbox"/> Care Plan	Percentage of HIV-positive medical case management clients who had care plans created at least twice during the year at three months apart	One Year

Systems-Level Measures([Select All](#))

Performance Measures	Measure Description	Period
<input type="checkbox"/> Housing Status	Percentage of HIV-positive clients who were stably housed at the end of the year	One Year
<input type="checkbox"/> Linkage to HIV Medical Care	Percentage of newly-diagnosed HIV-positive clients who had a medical care visit within 3 months of HIV diagnosis	One Year

5.7.7.1 HAB QM Indicators Summary Report

The Summary Report displays the summary results for each of the selected QM Indicators.

HAB QM Indicators - Summary Report		
(Custom Denominator Used, See Footer for Details)		
ARIES Partner		
Reporting Period Ending 8/6/2015		
QM Indicator	Numerator	Percentage
	Denominator	
Gap in Medical Tests: Percentage of HIV-positive clients who had a medical visit in the first and last half of the year	0	0.0%
	0	
Medical Visits Frequency: Percentage of HIV-positive clients who had at least one medical visit at least 60 days apart in each 6-month period	0	0.0%
	0	
Viral Load Suppression: Percentage of HIV-positive clients whose most recent viral load less than 200 copies/mL	0	0.0%
	0	
Prescribed Antiretroviral Therapy: Percentage of HIV-positive clients who were prescribed antiretroviral therapy	0	0.0%
	0	
TB Screening: Percentage of HIV-positive clients who were screened for tuberculosis at least once since diagnosis	0	0.0%
	0	
Cervical Cancer Screening: Percentage of HIV-positive female clients who had a Pap screening	0	0.0%
	0	
Chlamydia Screening: Percentage of HIV-positive clients who were screened for chlamydia	0	0.0%
	0	
Gonorrhea Screening: Percentage of HIV-positive clients who were screened for gonorrhea	0	0.0%
	0	
Hepatitis B Screening: Percentage of HIV-positive clients who were screened for hepatitis B at least once since diagnosis	0	0.0%
	0	

- All Client Export
- QM Client Follow-Up
- All Client Export
- QM Client Follow-Up
- All Client Export
- QM Client Follow-Up
- All Client Export
- QM Client Follow-Up
- All Client Export
- QM Client Follow-Up
- All Client Export
- QM Client Follow-Up
- All Client Export
- QM Client Follow-Up
- All Client Export
- QM Client Follow-Up

The results screen displays the summary results and description of each selected QM Indicator. For each indicator, both the numerator and the denominator of the outcome calculations are displayed. The outcome is displayed as a percentage in a separate column. The filter values you selected are displayed at the bottom of the report, just above the **Summary Report** and **Cancel** buttons.

Housing Status: Percentage of HIV-positive clients who were stably housed at the end of the year	0	0.0%
	0	
Linkage to HIV Medical Care: Percentage of newly-diagnosed HIV-positive clients who had a medical care visit within 3 months of HIV diagnosis	0	0.0%
	0	

Criteria: Agency Name: "ARIES Partner" End Date of the Report: "8/6/2015 12:00:00 AM" Date the Report was Generated: "8/6/2015 12:00:00 AM" ; HIV Exposure: Men who have sex with men (MSM)|Injection drug user (IDU)|Men who have sex with men and injection drug user (MSM and IDU)|Hemophilia/coagulation disorder|Heterosexual contact with an at-risk or infected partner|Receipt of transfusion of blood, blood components or tissue|Mother HIV infected/Perinatal transmission|Sexual abuse (pediatric only)|Undetermined|Risk not reported|Other|Unknown

This report was based on data generated at 8/5/2015 9:50:59 PM.

Summary Report Cancel

Summary Report

Selecting **Summary Report** will take you to the screen where you can select the Export file type and export the report to your computer. Selecting **Cancel** will take you back to the Report filters page.

Summary Report Data Considerations

If you think the Denominator for Measure 1 looks lower than you think it should be, you may want to:

- Check that your clients' HIV status information is up-to-date.
- Check that all their services -- particularly the "flagged" medical services -- have been entered completely and timely.

QM Client Follow-Up Report

Adjacent to the percentage for each Indicator on the Summary Results page is a button labeled **QM Client Follow-Up**.

For patient management, users may run a Follow-Up Report identifying clients who were in the Denominator of a particular QM Indicator, but not in the Numerator (i.e., clients who did not receive the required level of care).

The report includes each client's Name, Age (as of the end of the reporting.), Race (same grouping as in the RDR), Gender, Share Status, and Staff. The same filter values (criteria) used to generate the Summary Report will be used to generate the Follow Up report, and the filter values are shown on the report screen.

Follow-Up Report Data Considerations

- Look up the service screen for those clients who are listed on the QM Client Follow-Up Report in ARIES.
- Review the services that were provided during the reporting period
 - If there are any "flagged" medical services that have not been entered, enter them with the correct date of service.
 - If a "medical visit" occurs on the same day as a Laboratory Service, enter both services, not just the Laboratory Service.
- Re-run the HAB QM Indicator Report *at least one day after you have entered any missing or incorrect data*. You should see the percentage improve and fewer (no) clients on the QM Client Follow-Up report.

Note: For details on running the QM Client Follow-Up Report, click [here](#).

All Clients Export

The 'All Clients' report is specific to the Indicator selected on the Summary Report. It contains the list of individual clients included in the Indicator denominator, as shown on the Summary Report. This report can be used to verify a client's inclusion in the denominator after edits have been made to client data. (Note: Some data elements do not show up until the next day)The QM Follow Up Report contains clients who were in the denominator, but NOT in the numerator, whereas, the All Clients report contains ALL clients included in the denominator, irrespective of the numerator.

Exporting Results

You may export HAB QM Indicators results in three ways:

1)The entire set of results. The export file includes all clients in the denominator, regardless of numerator for all indicators.

- To export this data, click **Summary Report** on the Summary Report screen which will take you to the Export Results: HAB QM Indicators - Summary Report screen. On this page, select an export format: XML, Comma-separated Text, or Tab-separated Text. Then click the **Export** button.
- A **Download** button appears on this page, along with the system-assigned name of the report for the entire results.
- Click the **Download** button to save the file to your computer.
- You can open a downloaded report with your application on the hard drive.

Export Results: HAB QM Indicators - Summary Report

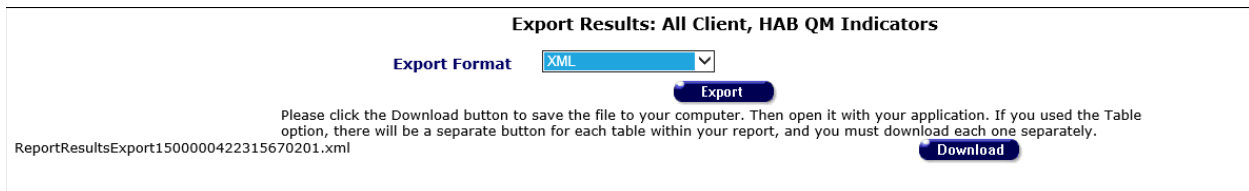
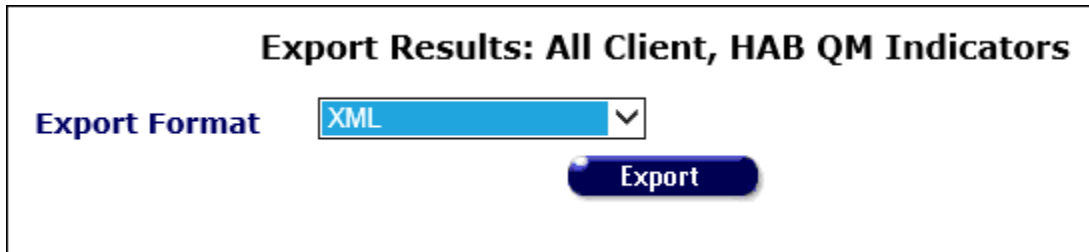
Export Format

Export



2) All clients for a specific indicator. The export file includes select data for all clients in the denominator and numerator, whether or not they have data available in the numerator. The results are limited to the specific indicator for which they are run.

- To export this data, click **All Client Export** button on the Summary Report screen, next to the indicator you are interested in, which will take you to the Export Results: All Client HAB QM Indicators screen. On this page, select an export format: XML, Comma-separated Text, or Tab-separated Text. Then click the Export button. Please note that there is no screen report page for this report, only an export. Export options are the same as they are for the QM Client Follow-up report.
- A **Download** button appears on this page, along with the system-assigned name of the report for the entire results.
- Click the **Download** button to save the file to your computer.
- You can open a downloaded report with your application on the hard drive.



3) Clients with missing numerator data for a specific indicator. The export file includes all clients in the denominator who are missing numerator data. The results are limited to the specific indicator for which they are run.

- To export this data, click the [QM Client Follow Up](#) button on the Summary Report screen, next to the indicator you are interested in, which will take you to the Client Follow Up HAB QM Indicators screen. You can view the report results on this screen. From here, select **Export**.
- You will be directed to the Export Results: Client Follow Up, HAB QM Indicators screen. On this page, select an export format: XML, Comma-separated Text, or Tab-separated Text. Then click the Export button.
- A Download button appears on this page, along with the system-assigned name of the report for the entire results.
- Click the Download button to save the file to your computer.
- You can open a downloaded report with your application on the hard drive.

Export Results: Client Follow-Up, HAB QM Indicators

Export Format XML ▼

Export

Client Follow-Up, HAB QM Indicators

Hepatitis B Screening: Percentage of HIV-positive clients who were not screened for hepatitis B at least once since diagnosis

Client	Age	Race	Gender	Share	Staff
Alias, Adam A	38	Hispanic White	Male	True	O'Mara, Mike
England, Amy E	83	Hispanic More than one race	Female	False	

2 records, generated 8/6/2015 6:39:39 AM
Criteria: Agency Name:'Shasta Test Services' End Date of the Report:'8/6/2015 12:00:00 AM' Date the Report was Generated:'8/6/2015 12:00:00 AM'
 This report was based on data generated at 8/5/2015 9:50:59 PM.

Export

Export Results: Client Follow-Up, HAB QM Indicators

Export Format XML ▼

Export

Please click the Download button to save the file to your computer. Then open it with your application. If you used the Table option, there will be a separate button for each table within your report, and you must download each one separately.

ReportResultsExport1500000422695369258.xml **Download**

5.7.8 HAB QM Indicators Follow-Up

To view a reference table of HAB QM Indicators calculations, click [here](#).

Adjacent to the percentage for each Indicator on the summary results page is a button labeled **QM Client Follow-Up** and a button labeled **All Client Export**. This section describes the QM Client Follow-Up Report. Information on the **All Client Export** can be found [here](#).

QM Indicator	Numerator	Percentage	
	Denominator		
positive clients who had a medical visit in the first and	0	0.0%	All Client Export QM Client Follow-Up
	20		

Clicking on the **QM Client Follow Up** button displays the Follow-Up Report for that Indicator.

Client Follow-Up, HAB QM Indicators					
Gap in Medical Tests: Percentage of HIV positive clients who did not have a medical visit in the last 6 months of the year					
Client	Age	Race	Gender	Share	Staff
Zweig, Timothy W	49	More than one race	Male	False	O'Mara, Mike
Yolen, April A	23	Hispanic More than one race	Female	False	Van Dyke, Roberta
Alston, Tricia J	41	More than one race	Female	True	O'Mara, Mike
Alias, Adam A	38	Hispanic White	Male	True	O'Mara, Mike
Briant, Bryan A	60	Hispanic More than one race	Male	False	
Bevel, Belinda K	33	Hispanic More than one race	Female	True	
Clark, Stella M	89	More than one race	Female	False	O'Mara, Mike
McDoodle, Randi K	28	Hispanic More than one race	Female	False	
Montgomery, Stacey A	31	Hispanic More than one race	Female	False	McCampbell, Nancy
Weasley, Ron R	30	Hispanic More than one race	Male	True	
Suarez, Julianne G	45	Hispanic More than one race	Female	False	
Steele, Juanita K	48	Hispanic More than one race	Female	False	McCampbell, Nancy
Regna, Richard B	33	Hispanic More than one race	Male	False	Blake, Betty
Dates, Clarence D	1	Not reported	Male	False	
Daniels, Kathilene A	25	Hispanic More than one race	Female	False	Van Dyke, Roberta
Deangela, Janet	23	White	Female	False	
Dogam, Ryan A	38	Hispanic More than one race	Male	False	
England, Amy E	83	Hispanic More than one race	Female	False	
Fay, Lucia R	30	Hispanic Asian	Female	False	
Foxx, Robert J	40	Hispanic More than one race	Male	True	

20 records, generated 8/6/2015 6:30:14 AM
 Criteria: Agency Name:'Shasta Test Services' End Date of the Report:'8/6/2015 12:00:00 AM' Date the Report was Generated:'8/6/2015 12:00:00 AM'
 This report was based on data generated at 8/5/2015 9:50:59 PM.

[Export](#)

The Follow-Up Report displays a list of clients who were in the Denominator of a particular QM Indicator, but not in the Numerator. This designates clients who did not receive the required level of care. For example, if 10 clients are in the denominator, and 6 are in the numerator, then 4 will appear on the client follow-up report. The report can be used to follow up with these clients and improve the level of care measured by an Indicator.

The report includes each client's Name, Age as of the end of the reporting period, Race, Gender, Share status, and Staff.

Exporting Follow-Up Results

Three types of exports are available for QM Indicators: export of the summary results, export of the client follow-up data and export of the all client data. The QM Client Indicator and All Client exports are covered directly below. For details on the summary results export, see the section on [Exporting Summary Results](#).

Export QM Client Follow Up Report

To export a follow-up report for a given Indicator, first display the report by clicking the **QM Client Follow-Up** button for that Indicator on the summary results page.

QM Indicator	Numerator	Percentage	All Client Export QM Client Follow-Up
	Denominator		
positive clients who had a medical visit in the first and	0	0.0%	
	20		

Then click the **Export** button on the Follow-Up Report screen. An Export Results dialog appears.

Client Follow-Up, HAB QM Indicators					
Hepatitis B Screening: Percentage of HIV-positive clients who were <u>not</u> screened for hepatitis B at least once since diagnosis					
Client	Age	Race	Gender	Share	Staff
Alias, Adam A	38	Hispanic White	Male	True	O'Mara, Mike
England, Amy E	83	Hispanic More than one race	Female	False	
2 records, generated 8/6/2015 6:39:39 AM					
Criteria: Agency Name: 'Shasta Test Services' End Date of the Report: '8/6/2015 12:00:00 AM' Date the Report was Generated: '8/6/2015 12:00:00 AM'					
This report was based on data generated at 8/5/2015 9:50:59 PM.					
Export					

Export Results: Client Follow-Up, HAB QM Indicators

Export Format

[Export](#)

Make a selection from the Export Format dropdown and click **Export**. Options include XML, Text/Comma Separated and Text/Tab Separated. An Export Report Result dialog appears, prompting you to download the export file to your computer.

Export Results: Client Follow-Up, HAB QM Indicators

Export Format

[Export](#)

Please click the Download button to save the file to your computer. Then open it with your application. If you used the Table option, there will be a separate button for each table within your report, and you must download each one separately.

ReportResultsExport1500000422695369258.xml [Download](#)

The name of the output file, with file extension, appears opposite the **Download** button.

5.7.9 HAB QM Indicator Calculations

Core Measures

Performance Measure	Definition	Numerator	Denominator	Patient Exclusions
Gap in Medical Visits	Percentage of clients, regardless of age, with a diagnosis of HIV who had a medical visit in the last 6 months of the measurement year.	Number of clients from the denominator who had a medical visit in the last 6 months of the measurement year.	Number of clients, regardless of age, with a diagnosis of HIV with at least one medical visit in the first six months of the measurement year.	Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged.
Medical Visit Frequency	Percentage of clients, regardless of age, with a diagnosis of HIV who had at least one medical visit	Number of clients from the denominator who had a least one medical visit in each 6-month period of	Number of clients, regardless of age, with a diagnosis of HIV with at least one medical visit in	Clients who, as of the end of the reporting period, were reported

	in each 6-month period of the 24-month measurement period with a minimum of 60 days between medical visits.	the 12-month measurement period with a minimum of 60 days between the first medical visit in the prior 6-month period and the last medical visit in the subsequent 6-month period.	the first 6 months of the 24-month measurement period.	deceased, confirmed deceased, disenrolled or discharged.
<i>Viral Load Suppression</i>	Percentage of clients, regardless of age, with a diagnosis of HIV with a HIV viral load less than 200 copies per mL at last HIV viral load test during the measurement year.	Number of clients from the denominator whose (1) last viral load test within the measurement year is (2) less than 200 copies per mL.	Number of clients, regardless of age, with a diagnosis of HIV with at least one medical visit in the measurement year.	Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged.
<i>Prescribed Antiretroviral Therapy</i>	Percentage of clients, regardless of age, with a diagnosis of HIV prescribed antiretroviral therapy for the treatment of HIV infection during the measurement year.	Number of patients from the denominator prescribed HIV antiretroviral therapy during the measurement year.	Number of clients, regardless of age, with a diagnosis of HIV with at least one medical visit in the measurement year.	Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged.

All Ages Measures

Performance Measure	Definition	Numerator	Denominator	Patient Exclusions
<i>TB Screening</i>	Percentage of clients aged 3 months and older with a diagnosis of HIV, for whom there was documentation that a tuberculosis (TB) screening test was performed and results interpreted (for tuberculin skin tests) at least once since the diagnosis of HIV infection.	Number of clients from the denominator who had 1) Date PPD read or 2) IGRA Date at least once since HIV diagnosis.	All clients aged 3 months and older with a diagnosis of HIV, who had at least one medical visit during the measurement year.	Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged.

Adult/Adolescent Measures

Performance Measure	Definition	Numerator	Denominator	Patient Exclusions
<i>Cervical Cancer Screening</i>	Percentage of female clients with a diagnosis of HIV who have a Pap screening in the measurement year.	Number of female clients in the denominator who had Pap screen results documented in the measurement year.	Number of female clients age 13 and older with a diagnosis of HIV who had a medical visit with a provider with prescribing privilege at least once in the measurement year.	Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged.
<i>Chlamydia Screening</i>	Percentage of clients with a diagnosis of HIV at risk for sexually transmitted infections (STI) who had a test for chlamydia within the measurement year	Number of clients in the denominator who had a test for chlamydia in the measurement year.	Number of clients age 13 and older with a diagnosis of HIV who had a medical visit with a provider with prescribing privilege at least once in the measurement year.	1) Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged. 2) Clients whose most recent Chlamydia test within the reporting period has a diagnosis of 'Is Not Medically Indicated.'
<i>Gonorrhea Screening</i>	Percentage of clients with a diagnosis of HIV at risk for sexually transmitted infections (STI) who had a test for gonorrhea within the measurement year	Number of clients in the denominator who had a test for gonorrhea in the measurement year.	Number of clients age 13 and older with a diagnosis of HIV who had a medical visit with a provider with prescribing privilege at least once in the measurement year.	1) Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged. 2) Clients whose most recent Chlamydia test within the

				reporting period has a diagnosis of 'Is Not Medically Indicated.'
<i>Hepatitis B Screening</i>	Percentage of clients for whom Hepatitis B screening was performed at least once since the diagnosis of HIV.	Number of clients in the denominator for whom Hepatitis B screening was performed at least once since the diagnosis of HIV.	Number of clients age 13 and older with a diagnosis of HIV with at least two medical visits in the measurement year, with at least 60 days in between each visit.	1) Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged. 2) Clients with a positive Hepatitis B diagnostic test with a test date before the end of the reporting period. 3) Clients whose Hepatitis Dose 3 date or Twinrix Dose 3 date is before the end of the reporting period.
<i>Hepatitis B Vaccine</i>	Percentage of clients who completed the vaccine series for Hepatitis B.	Number of clients in the denominator with documentation of having ever complete the vaccination series for Hepatitis B.	Number of clients age 13 or older with a diagnosis of HIV who had a medical visit with a provider with prescribing privilege at least once in the measurement year.	1) Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged. 2) Clients with a positive Hepatitis B diagnostic test with a test date before the end of the reporting period
<i>Hepatitis C Screening</i>	Percentage of clients for whom Hepatitis C (HCV) screening was	Number of clients in the denominator for whom Hepatitis C	Number of clients with a diagnosis of HIV with at	1) Clients who, as of the end of the reporting period, were

	performed at least once since the diagnosis of HIV.	screening was performed at least once since the diagnosis of HIV.	least one medical visits in the measurement year.	reported deceased, confirmed deceased, disenrolled or discharged. 2) Clients with a positive Hepatitis C diagnostic test and a treatment start date before the end of the reporting period.
<i>Oral Exam</i>	Percentage of clients with a diagnosis of HIV who received an oral exam by a dentist at least once during the measurement year.	Number of clients from the denominator who had an oral exam by a dentist during the measurement year, based on client self-report or other documentation.	Number of clients, age 13 and above, with a diagnosis of HIV with at least one medical visit in the measurement year.	Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged.
<i>Syphilis Screening</i>	Percentage of clients with a diagnosis of HIV who had a test for syphilis within the measurement year.	Number of clients in the denominator who had a test for syphilis in the measurement year.	Number of clients, age 13 and older, with a diagnosis of HIV who had a medical visit with a provider with prescribing privilege at least once in the measurement year.	1) Clients who, as of the end of the reporting period, were reported deceased, confirmed deceased, disenrolled or discharged. 2) Clients whose most recent Syphilis record within the reporting period has a diagnosis of 'Not Medically Indicated.'

Medical Case Management Measures

Performance Measure	Definition	Numerator	Denominator	Patient Exclusions
<i>Care Plan</i>	Percentage of medical case management	Number of clients from the denominator who	Number of medical case management	1) Medical case management clients who, as

	clients, regardless of age, with a diagnosis of HIV who had a medical case management care plan developed and/or updated two or more times in the measurement year.	had a Care Plan developed and/or updated two more times which are at least three months apart in the measurement year.	clients, regardless of age, with a diagnosis of HIV who had at least one medical case management visit in the measurement year.	of the end of the reporting period, were report deceased, confirmed deceased, disenrolled or discharged. 2) Clients whose first Medical Case Management service was within six months of the end of the reporting period.
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Systems Level Measures

Performance Measure	Definition	Numerator	Denominator	Patient Exclusions
<i>Housing Status</i>	Percentage of clients with a diagnosis of HIV who were stably housed in the 12 - month measurement period.	Number of clients from the denominator who were stably housed as of the end of the 12 - month measurement period.	Number of clients with a diagnosis of HIV who were receiving HIV service in the last 12 months.	Clients who, as of the end of the reporting period, were report deceased, confirmed deceased, disenrolled or discharged.
<i>Linkage to HIV Medical Care</i>	Percentage of clients who attended a routine HIV medical care visit within 3 months of HIV diagnosis.	Number of clients from the denominator who attended a routine HIV medical care visit within 3 months of the date of HIV diagnosis.	Number of clients, regardless of age, with a diagnosis of HIV in the 12 - month measurement period.	Client who were reported or confirmed deceased with 7 days of diagnosis

5.7.11 EIP Overall Summary

5.7.11 EIP Overall Summary

The EIP Overall Summary report displays your agency's EIP service and client information in a series of tables. You can then export your data for use in EIP reports or print it directly from the ARIES screen.

To access the report:

- From the [ARIES menu bar](#) at the top of the ARIES screen, select **Report > Compliance**, which takes you to the [Compliance Reports](#) screen.
- Click the "EIP Overall Summary" link, which takes you to the report's filter values screen.

Report Filter Values

Report Filter Values

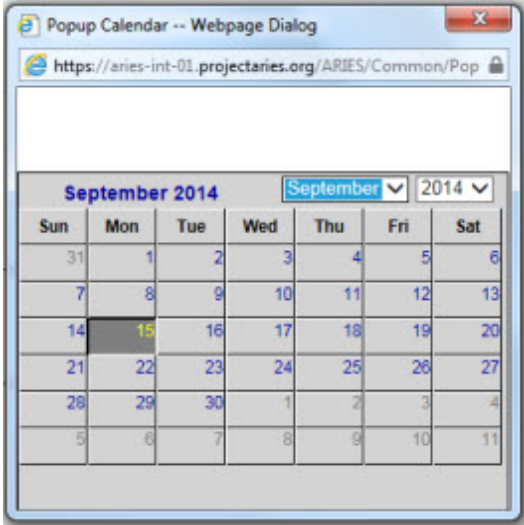
EIP Overall Summary

Date of Service Between ▼ 7/1/2009 & 6/30/2010

Display 1000 **results** Display print format



Report >
Export

Complete the fields as follows:

Date of Service	Use the dropdown to select the type of filter you want to perform. You can search before or after a date, or between two dates.
Date text fields	<p>Enter the date you wish to filter by in the first text field. Use the format MM/DD/YYYY. Example: For January 28, 2011, enter 1/28/2011. You can also click the calendar icon to use the pop-up calendar.</p> 

	<p>Use the dropdown lists to select the month and year you wish to enter. Click the day and the date displays in the text field. The pop-up calendar window closes automatically.</p> <p>To filter for records on a given day: Select "On" from the dropdown and enter a specific date (e.g. 6/23/2011) in the first text field. Leave the second text field empty.</p> <p>To sort through all services before - but not on - a specific date: Select "Before" from the dropdown and enter the date (e.g. 6/23/2011) in the first text field. Leave the second text field empty. This will retrieve service records before midnight on June 22, 2011.</p> <p>To bring up all services after a specific date, including records dated that day: Select "After" from the dropdown and enter the date (e.g., 6/23/2011) in the first text field. Leave the second text field empty.</p> <p>To filter a range of dates: Select "Between" from the dropdown. Enter the beginning date in the first text field and the ending date in the second text field. Your report results will include all services that occurred from 12:00 AM on the first date to 11:59 PM on the second date.</p>
<p>Display text field</p>	<p>The Display text field at the bottom of the screen allows you to control the maximum number of rows that will appear in your report. The more results you ask for, the longer the search will take. The default is set at 1000, which typically fills the screen with results. You can always narrow your search or increase your search results later.</p>
<p>Display print format checkbox</p>	<p>Check this box to generate your report without the ARIES menu bar if you want to print your report directly from the browser window.</p>

When you have set your filters:

	<p>Click the Report > button to view results on the EIP Overall Summary Report Results screen.</p>
	<p>Click the Export button to export your results to a file.</p> <p>Note: It is recommended that you first proof the report results before exporting it.</p>

EIP Summary Report Results

Overall Summary for 7/1/2009 thru 6/30/2010		
EIP Site: ARIES Partner		
Status at Start of Reporting Period		Clients
Active		397
Medically Reactivated		47
Re-enrolled		51
Transitioned		41
Total		536
Status Change		Change
Clients Enrolled (new)		397
Clients Re-Enrolled		51
Clients Disenrolled		-50
Net Change In Period		398
Status at End of Reporting Period		Clients
Active		397
Medically Reactivated		48
Re-enrolled		51
Transitioned		42
Total		538
Unique Client Served:		0
Total AIDS-Diagnosis AFTER Enrollment		0 0.00%
Services	Count of Contacts	Unique Clients
Total for All Services	0	0
Referrals	Count of Contacts	Unique Clients
Total for All Referrals	0	0
Export		

The report displays a series of tables with the name of the agency and the time span of the report at the top of the screen. The tables listed include:

Status at Start of Reporting Period	Lists the status of all EIP-enrolled clients at the first date of the time span specified in the previous screen.
Status Change	Displays any changes in EIP status of clients during the reporting period.
Status at End of Reporting Period	Lists the status of all EIP-enrolled clients at the end date of the time span specified in the previous screen.
Unique Clients Served	Displays the number of distinct clients who received EIP services during the reporting period. If a client received multiple services, they are still only counted once.
Total AIDS - Diagnosis AFTER Enrollment	Displays the number and percentage of clients diagnosed with AIDS after enrollment.
Services	Displays the type of EIP services administered during the time period as well as the number of contacts for each service type and the number of unique clients served. The last row displays the total number of contacts and unique clients served. If a client receives multiple EIP services, they are still only counted once so the unique clients total may not equal the sum of the rows.

Referrals	Displays the type of EIP referrals administered during the time period as well as the number of contacts for each referral type and the number of unique clients referred. The last row displays the total number of contacts and unique clients referred. If a client receives multiple referrals, they are still only counted once so the unique clients total may not equal the sum of the rows.
------------------	---

Export: Clicking the **Export** button on the Results page takes you back to the [Filter Values](#) screen. Use the **Export** button on that page, not on the Results page, to [export your data](#).

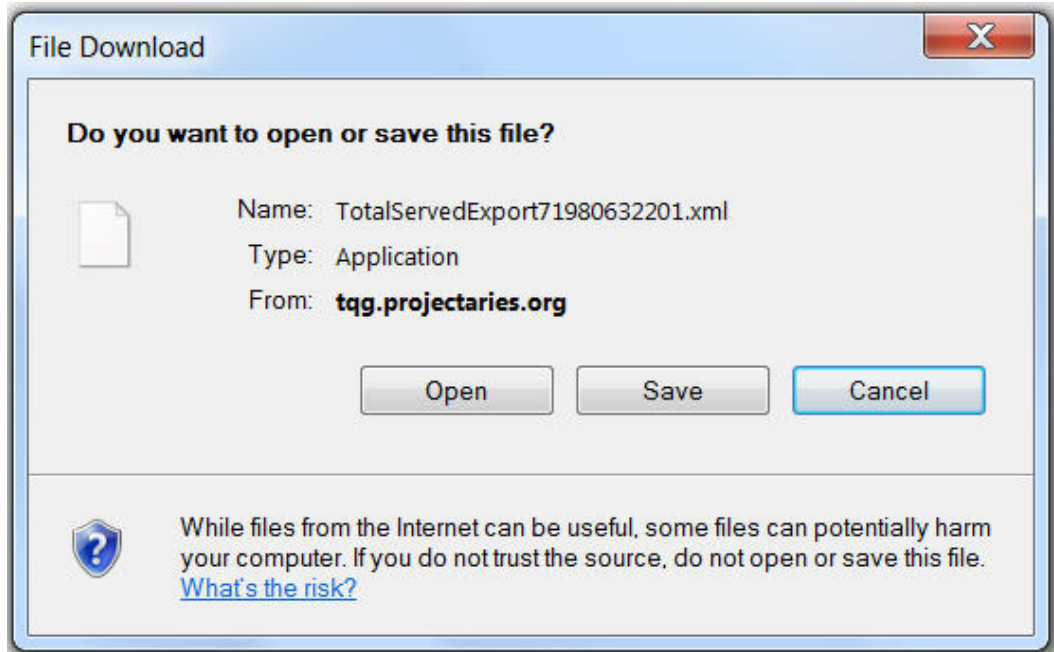
When you have reviewed the results:

Export	Click the Export button to return to the Filter Values screen. Use the Export button on the Filter Values page (not on the Results page) to export your data .
---------------	--

On the Filter Values screen:

Export	<p>Click the Export button in Filter Values to display the option of opening or saving the data in XML, text comma-separated, or text tab-separated format.</p> <div data-bbox="457 968 1624 1268"> <p style="text-align: center;">Export Results: EIP Overall Summary</p> <p>Export Format <input type="text" value="XML"/> <input type="button" value="v"/></p> <p style="text-align: right;"><input type="button" value="Export"/></p> </div> <p>Use the dropdown to select the format in which option to save the data. Click Export again to display the Export Report Result:</p> <div data-bbox="451 1409 1624 1682"> <p style="text-align: center;">Export Report Result</p> <p>Export Format <input type="text" value="XML"/> <input type="button" value="v"/></p> <p style="text-align: right;"><input type="button" value="Export"/></p> <p>Please click the Download button to save the file to your computer. Then open it with your application. If you used the Table option, there will be a separate button for each table within your report, and you must download each one separately.</p> <p>TotalServedExport787460267.xml <input type="button" value="Download"/></p> </div>
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- Click **Download** to display the File Download dialogue box.



Select one of the following:

Open	Click Open to open the report on your computer screen.
Save	Click Save to open a dialog box that allows you to choose the file path where the file will be saved.
Cancel	Click Cancel to close the dialog box and return to the Export Report Result screen.

Note: The system assigns a filename to the download and displays it on the lower left corner of the Export Report Result screen shown above. The file extension depends on the format you select for the download file (e.g., .xml for XML; .csv for Text, Comma-Separated; .txt for Text, Tab-Separated).

5.7.12 OA Provider Report

5.7.12 OA Provider Report

Report Objective

The purpose of the Office of AIDS (OA) Provider Report is to measure HIV care performance by three key Quality Clinical Measures and other core continuous quality improvement measures per an individual HIV Provider Agency as well as measure California's statewide performance. The OA Provider Report is based on the *HIV Treatment Cascade* and *Care Continuum* standards.

Agency, Contract, Service Dates

First, filter the report by the agency providing client services by selecting the agency name from the dropdown ARIES provider agencies. Only one agency may be selected per report. A provider agency running the OA Provider Report will only be able to select their agency from the dropdown. An administrative agency will have the ability to select an agency from their Provider Network.

The contract filter allows the end user to run the report based on contracts which fund services as determined by the contracts start and end dates. That is, dates of services provided within a selected contract’s period will be subject to the report.

The date range is useful in two ways: if no contract is selected in the contract’s filter, the end user can determine a reporting period’s date range that is customized to their reporting needs. Also, if only a portion of a contract’s fiscal year is necessary for the report, selecting a date range which covers a portion of the fiscal year will only produce those service dates within in the date range determined appropriate for the report, but not all the dates that span the entirety of the contract’s fiscal year. This is helpful for reports necessary for calendar year, and two contracts’ fiscal years make up the entirety of that calendar year, e.g. Contract A’s fiscal year is 7/1/2015 – 6/30/2016 and Contract B’s fiscal year is 7/1/2016 – 6/30/2017, however, the need for the report is for clients served during calendar year 2016. By choosing both Contract A and Contract B from the contract’s filter and then choosing a date range of 1/1/2016 – 12/31/2016, the report will produce results for only those services dates from both contracts with no service dates outside of those dates.

Select Agency A - Oakland Harbor Clinic ▼

Select Program HCP ▼

Select Funding Sources ▲

AAA Custom agency	→	CA State Office of AIDS
Bill Gates Foundation	←	
CDC	▶▶	
City GF	◀◀	

Select Contracts ▼

Select a custom date range From Date To Date

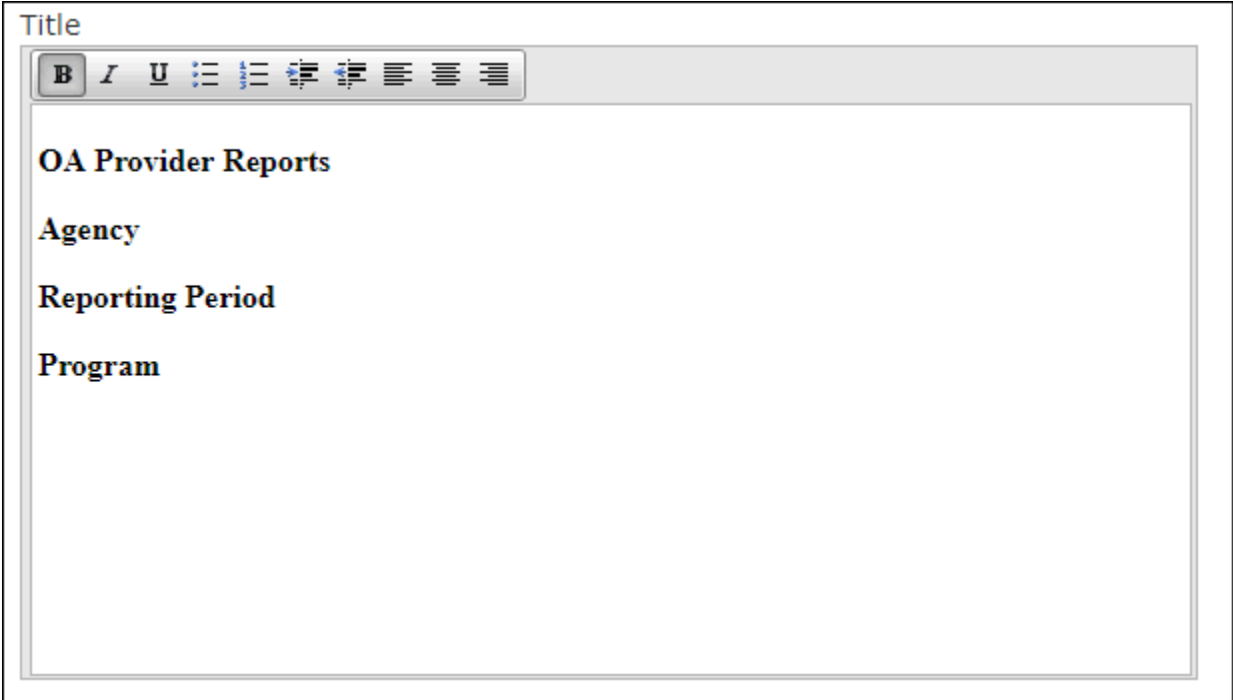
Cover Page

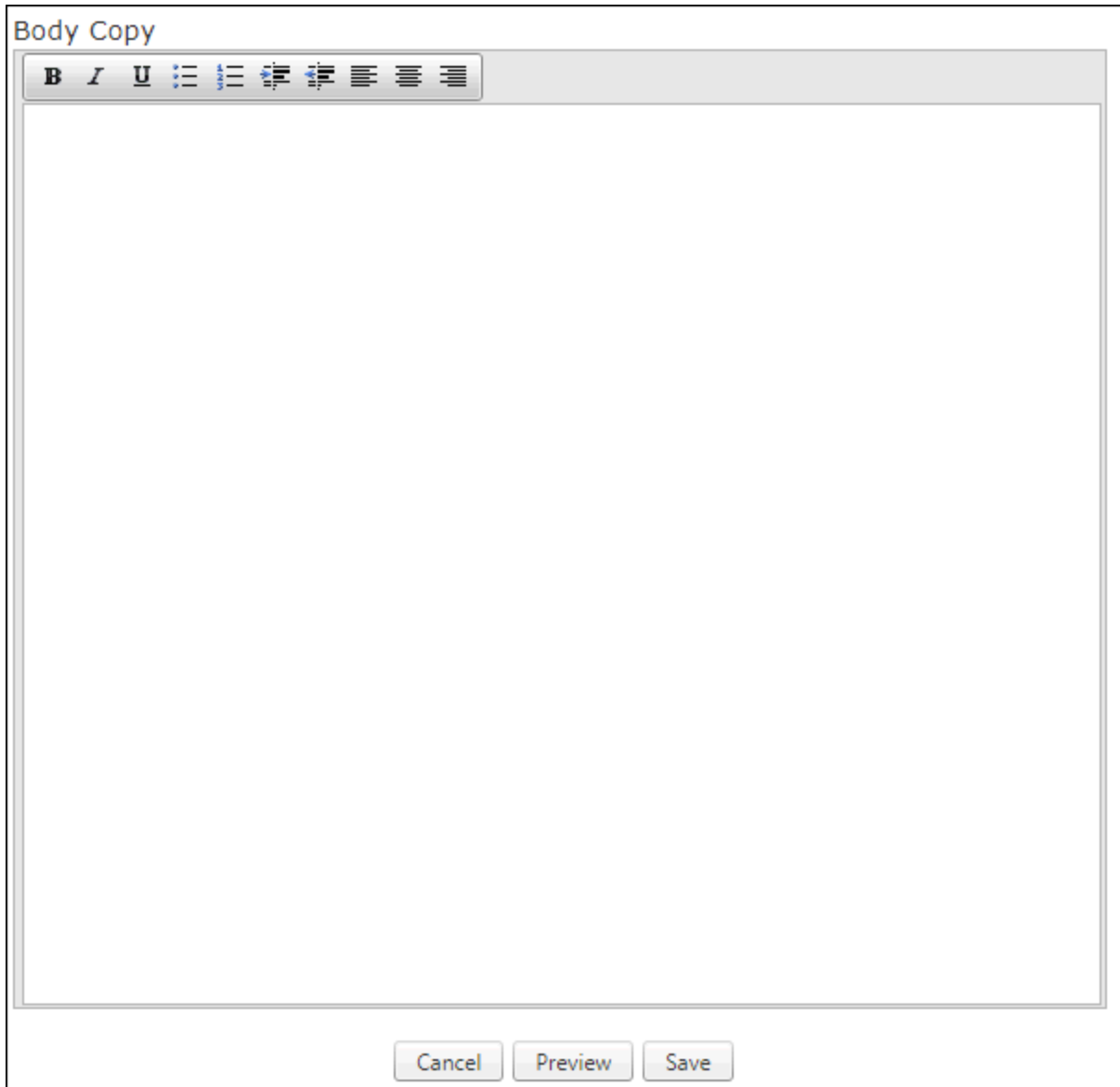
Create Cover Page

a) Modifiable Text

Depending on end users' permissions in ARIES, the text of the OA Provider Report's cover page can be modified to meet the report expectations as well as the intended audience of the report's output.

After opening the Cover Page window, using the mouse select a location within the Title and/or the text body. Enter text as appropriate. When completed, select Save and Done.

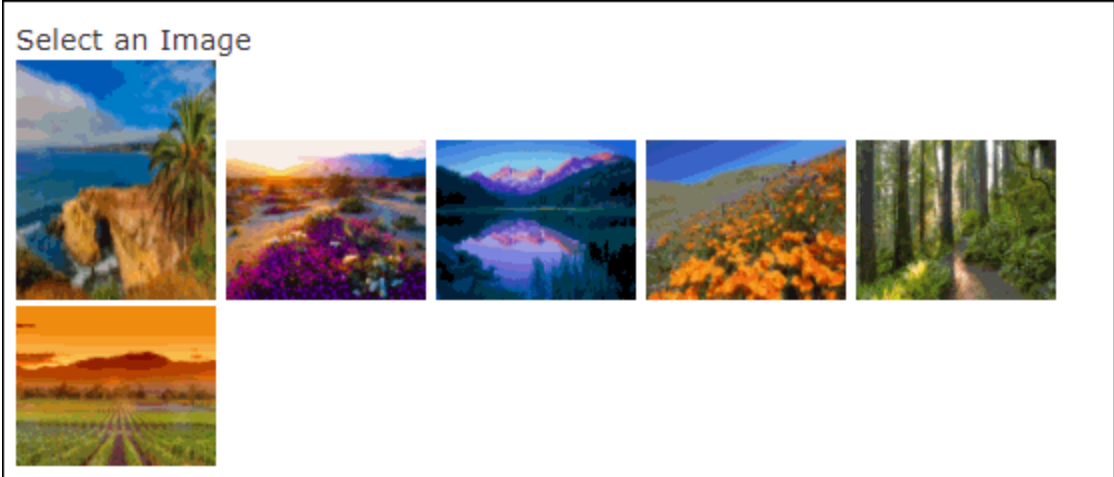




b) Stock Images

Six stock images are provided as an option to tailor the Cover Page of the OA Provider Report. The image choices are based on the various California regions. Select the image which best represents the region which the OA Provider Report is being generated from. For example, agencies running the OA Provider Report located in the desert regions of California can opt to use the image of the desert. Similarly, agencies running the OA Provider Report located in the interior valley may opt to use the agriculture image from the image options.

Simply select the choice image from the cover page window to add it the text box. Once the text for the Cover Page is completed, select Save and Done. See Cover Page > Modifiable Text for more information.



c) Preview your Cover Page

A pop up window will open and display the Cover Page with your selections and added context. Export your Cover Page to an external application such as MS Word and Excel or Adobe Acrobat. Select the appropriate file format from the Export File dropdown located on the top right-hand side of the Cover Page preview window.

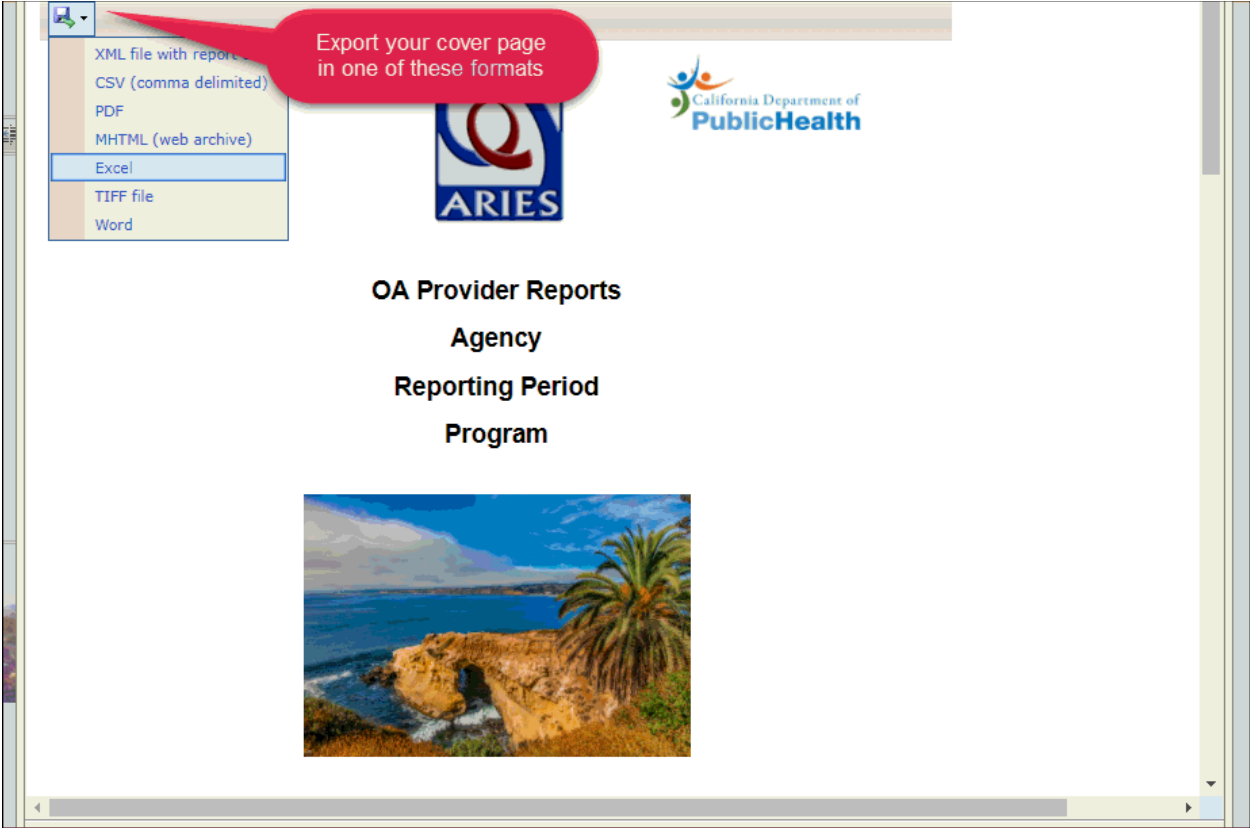


Chart Selection

a) Data Elements

You can tailor the OA Provider Report to measure the quality of care and data compliance for a specific agency. Several data elements are available to choose from that are relevant to the HIV Care Continuum. Additional data elements are also included to support quality care and data compliance, e.g. Client Consent and Timeliness of Data Entry.

Select the charts you want to monitor and report by checking each box individually or check Select All Charts to include all the charts for monitoring and reporting.

- Clients Services
- Eligibility
- Housing
- Clinical Measures
- Minority AIDS Initiative
- Client Share Consent
- Timeliness of Data Entry

Select All Charts
Client Services
 Clients Served(Core)

Chart: Count of HCP Clients Served - FY 2011-12 - FY 2017-18

Chart: Count of HCP Clients Served by Service Category - FY 2017-18

[Preview Charts](#)

 Percent of Clients who Received HOPWA Subsidy Assistance and Case Management (HOPWA)

Chart: Percent of HCP Clients who received HOPWA Subsidies and Case Management - FY 2017-18

[Preview Charts](#)

Eligibility
 Proof Of HIV Diagnosis(Core)

Chart: Percent of HCP Clients with Proof Of HIV Diagnosis Entered into ARIES - FY 2017-18

[Preview Charts](#)

 Percent of Clients by Federal Poverty Level (HCP)

Chart: Percent of HCP Clients by Federal Poverty Level - FY 2017-18

[Preview Charts](#)

 Percent of Clients by Area Median Income (HOPWA)

Chart: Percent of HCP Clients by Area Median Income - FY 2017-18

[Preview Charts](#)

 Comprehensive Health Coverage (HCP)

Chart: Percent of HCP Clients with Comprehensive Health Coverage - FY 2017-18

Chart: Percent of HCP Clients by Type of Medical Insurance - FY 2017-18

[Preview Charts](#)

Housing
 Percent of Clients by Housing Status (HCP)

Chart: Percent of HCP Clients by Housing Status - FY 2017-18

[Preview Charts](#)

 Percent of HOPWA Clients who had at least one Housing Income and Assessment Record in ARIES

Chart: Percent of HCP Clients who had at least one Housing Income and Assessment Record in ARIES - FY 2017-18

[Preview Charts](#)

 Percent of HOPWA Clients Served who had at least one Housing Status Record in ARIES

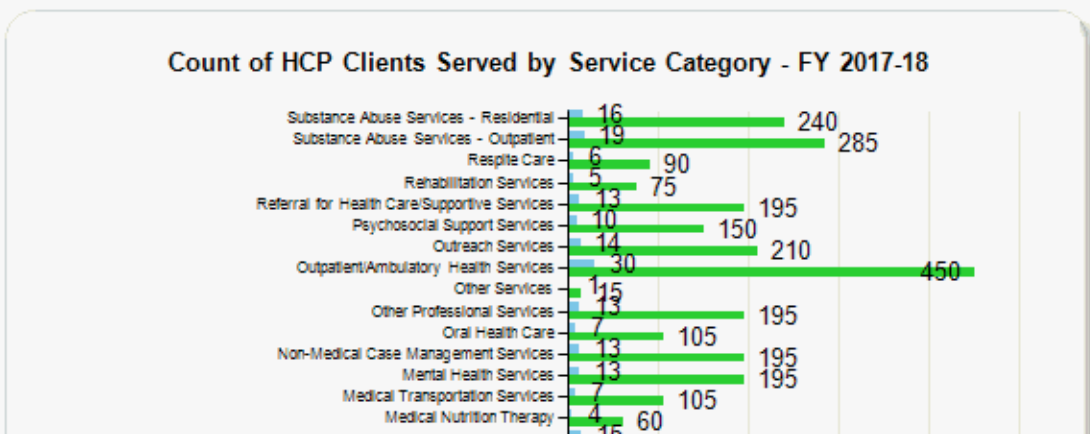
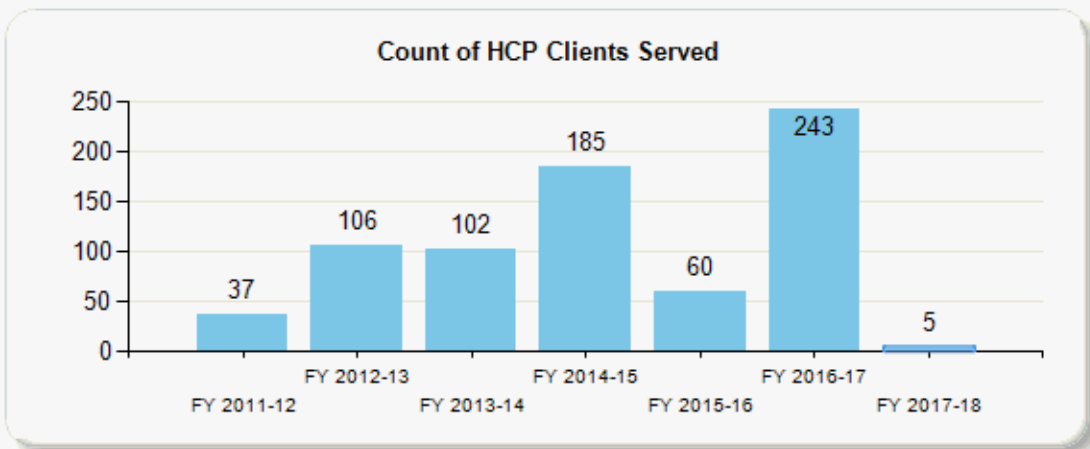
Chart: Percent of HCP Clients Served who had at least one Housing Status Record in ARIES - FY 2017-18

[Preview Charts](#)

Preview Report



OA Provider Reports
Agency
Reporting Period
Program



Summary Report

The OA Provider *Reports* are a series of summary reports based on the data elements, or Charts, you selected prior to running the report. Each report's outcome is a summary (no client identifiers or detail is shown) and displays nicely in chart or graph form. This enhances the analytic quality of ARIES data reporting. Exporting the summary(ies) report as a PDF is a quick way to provide At A Glance analytical reports to board meetings, stakeholder meetings, and strategy meetings where it is important to have clear, de-identified aggregated data for review. This saves the end user the additional steps of exporting ARIES data to Excel or Access, completing a query and analysis, and then formatting the results into a infographic document for distribution.

The key clinical quality performance measures the OA Provider Report performs are:

- Viral Load Suppression
- Clients Served whose most recent viral load is < 200 copies/ml.
- Prescribed Antiretroviral Therapy (ART)
- Client who were prescribed an ART and started during or prior to reporting period.
- Linkage to Care (MAI)
- Clients served in the reporting period who were also linked to care.

Reminder: Be sure to select the appropriate Chart(s) from OA Provider Reports filter that line up with the performance measure(s) you want to monitor and report on. See Chart Selection of this Help topic for instructions.

Numerator

The number of clients who meet the criteria for the clinical measure. In a fraction, this is the top number, e.g. 50/100.

Denominator

The number of clients who meet the baseline for a clinical measure but may not necessarily meet the criteria for the clinical measure. In a fraction, this is the bottom number, e.g. 50/100

Percentage

The percentage of clients who meet the criteria of the clinical measure. In other words, the numerator in percentages.

All Client Export

ARIES OA Provider Report provides "follow up" reports for data improvement. This provides the end user with a quick report containing clients who meet the baseline criteria of a particular measure - the Denominator - ,however, have not met the criteria necessary for the a measure's quality threshold - the Numerator. Clients who have not met the quality threshold are considered a deficiency for that particular measure and a corrective action should be implemented using the "follow up" report as the source.

Clients who meet the measure are indicated with a numeric "1" in the numerator column. Clients who did not meet the measure are indicated with a "0" in the same numerator column. These are the clients who may need the focus of a data review and/or improvement plan and follow up.

Report Display

You may view the OA Provider Report in various ways including the option to export the report file to external applications where more work can be done to the report or for printing adjustments.

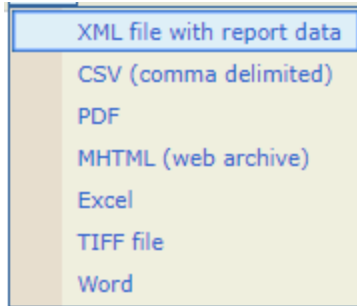
Browser View

View the details of your report in the internet browser you are currently using for ARIES. To view the report in a separate tab from the one you are working in hit Ctrl + T on your keyboard. A new tab will open in your internet browser to display the report. You may also right click on the All Client Export button and select *Open Link in New Tab*. Your report results will appear in a new tab in your internet browser.

Export

Select the file format appropriate for the external application you use to view the file. Examples of frequently used formats when exporting reporting data from ARIES are:

- .pdf (opens in Acrobat Reader or Acrobat)
- .csv (opens in MS Excel)
- .xml (opens in MS Access or other database applications)



Applications

To open and view the report export file the end user will need to have the appropriate application for the particular file format selected for export operating on their computer. E.g. .PDF or *Portable Document Format* file requires Adobe Reader or Acrobat, .CSV or *Comma-separated Values* file requires a worksheet application like Microsoft Excel or Google Sheets.

- Adobe Reader/Acrobat
- Microsoft Excel
- Microsoft Access
- Microsoft Word

Find more about the *HIV Care Continuum* and *Treatment Cascade* online by using keywords "CDC" and "HIV Care Continuum" in your search.

ARIES Online Help for Related Reports:

[HAB QM Indicators Report](#), [Statistical Analyst Report \(STAR\)](#)

Section 6

6 Introduction to Outreach Services

Outreach Services functionality in ARIES allows for the collection of Outreach Services data for both known and anonymous clients, while providing enhanced reporting for the Minority AIDS Initiative (MAI) and for agencies contracted to provide Outreach Services and/or Early Intervention Services (EIS). Outreach Services covers the following general categories of functionality:

- Anonymous Client Encounter (ACE) data collection, including HIV Testing and Counseling;
- Linking ACE records to known ARIES Client records;
- Outreach Worker dashboard and abbreviated tab strips for known and anonymous clients;
- Intra-agency Outreach Referrals;
- Re-engagement and Link-to-Care tracking; and,
- Enhanced ReportExport and ARIESAdmin Export reporting.

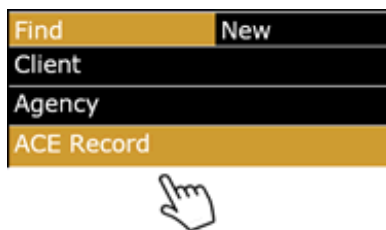
Outreach Workers with appropriate permissions will be able to collect and track data on clients who may be anonymous, marginally identified, or who otherwise lack the six identifiers currently required of ARIES Care clients. The system will generate an identifier for these Anonymous Client Encounter (ACE) records, the ACE records will be searchable, and Case Managers will have the ability to link an ACE record to a known ARIES Client record. Outreach Workers will be able to collect data on the variety of outreach services they provide according to their contract and abbreviated service hierarchy configuration.

ARIES Menu Bar

Once you have logged into ARIES, if you are an Outreach Worker with the proper permissions, you will be able to see the Outreach Services options in the **Find** and **New** dropdowns. Through the ACE Record links you will be able to access the Outreach Services screens. The menu bar is not visible if you are filling out a form that must be saved or cancelled before you proceed. If the menu bar does not appear in a screen, you must click either the **Save** or the **Cancel** button to proceed. Selecting **Logout** will log you out of ARIES and take you back to the login screen.

Menus

For users with Outreach Services permissions, the Find menu includes an ACE Record option. Users without Outreach Services permissions will only see ARIES options for searching for Client, Staff, and Agency.



Read-Only vs. Edit Screens

Read-only screens display information previously entered on an edit screen. Edit screens are where users add or edit client data. The **Edit** buttons on the read-only screens are only available to those users with the appropriate permission levels.

Permissions

The user group Outreach Worker includes default permissions that give users in this group access to the Anonymous Client Encounter (ACE) tabs and a truncated ARIES tab strip. This allows the outreach worker to efficiently enter demographic, service, and HIV test and referral data to an encounter for an anonymous client, or to add demographic, contact, service, HIV test data, or referral data for ARIES clients.

There are three additional permissions in the Outreach Services section of the permissions that are not given by default but may be granted to users as needed. They are Use Full ARIES Client Tabs, Link ACE Record and Unlink ACE Record.

ACE OUTREACH SERVICES				
Use Full ARIES Client Tabs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outreach Dashboard	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACE Search	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACE Demographics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACE Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ACE Referrals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ACE HIV Tests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Link ACE Record	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unlink ACE Record	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use Full ARIES Client Tabs

The Use Full ARIES Client Tabs only allows for the View permission and should be used when a user in the Outreach Worker group needs to see more information about an ARIES client than what is available on the limited five-tab default strip containing Demographics, Contact Information, Services, HIV Test data, and Referrals. For instance, an Outreach Worker may routinely wish to see other programs an ARIES client is involved in. As the permission is View only, the user will have access to the full complement of ARIES read-only screens. They will only have the ability to update the information on those screens for which the default Outreach Worker user group permission allows. The exception to this is HIV Test data.

Default Outreach Worker permissions allow for the editing of HIV test data. With access to the full ARIES Client tabs, the HIV Test table appears on the Basic Medical tab; the user will have the ability to edit all the fields on that tab, not just HIV Test data. If an Outreach Worker routinely needs to update information on the full ARIES Client tabs, they should be given the Use Full ARIES tab permission under Outreach Services, and Edit permissions on the ARIES tabs they will need to update.

Users who belong to a user group with full access to ARIES (Case Manager, for example) may be granted ACE Outreach Services permissions so that they will have access to the ACE functionality in addition to their standard ARIES permissions. Please note that ARIES referrals only display on the Outreach Services dashboard if they have been assigned to an individual in the Outreach Services user group.

Link ACE Record and Unlink ACE Record

The Link ACE Record permissions allows the user to link an ACE record or records to a known ARIES Client. The Unlink ACE records permission allows the user to unlink ACE records for ARIES Client records. Please note that Unlinking will return both the ARIES

Client record and the ACE record back to the state they were in at the time they were linked. If very little time has passed, there is not likely to be a large impact but if many changes have been made to the ARIES record, for example, those changes will be lost. See the section on Linking and Unlinking ARIES and ACE records for a description of linking and unlinking records.

If an ACE record is linked to an ARIES record, the ACE data will be available for viewing within the ARIES record and as such will be available for reporting.

Permissions for Linking and Unlinking ACE records to an ARIES record

To give a user permission to Link and Unlink ACE IDs from ARIES Client records they must either be a full ARIES Client user (Case Manager for example) who has also been granted Outreach Services Link and Unlink permissions. Assuming that a user has the default permissions for the Outreach Worker role, these are the additional permissions required to allow the user to link or unlink records while continuing in that role:

- Staff Assignment (Read)
- Use Full ARIES Client Tabs (Read)
- Link ACE Record (Read, Change)
- Unlink ACE Record (Read, Change)

The following are the minimum permissions to Link/Unlink when the user is NOT in the Outreach Worker role:

- Client Search (Read)
- Contact Info (Read)
- Demographic Detail (Read)
- Staff Assignment (Read)
- ACE Outreach Services (Read)
- Link ACE Record (Read, Change)
- Unlink ACE Record (Read, Change)
- Access ARIESClient

Note that "Use Full ARIES Client Tabs" is only required when users are assigned to the Outreach Worker role.

6.1 Outreach Worker Dashboard

The ACE Dashboard page is accessed via the Shortcut's menu, the Welcome screen or as the Home Page for the user if selected on the Staff Edit page. The Dashboard has two sections: ACE Records and ARIES Clients. Each section has a set of filters which will limit the results displayed on the Dashboard.

ACE Worker Dashboard

ACE

Referral Date: After ▼ 12/01/2015 and [calendar icon]

Outcome Date: Is Null ▼ [calendar icon] and [calendar icon]

Last Service: After ▼ 01/01/2015 and [calendar icon]

Outcome: [dropdown]

Staff: O'Mara, Mike ▼ **Search**

ACE ID	Refer Date	Last Service	Outcome Date	Outcome	Staff
A001J2	12/2/2015 Outreach	5/25/2016 EIS			O'Mara, Mike
A001G4	12/2/2015 Outreach	4/25/2016 EIS			O'Mara, Mike
A001F1	12/2/2015 Outreach	4/22/2016 EIS			O'Mara, Mike
A001E4	1/2/2016 Outreach	3/20/2016 EIS			O'Mara, Mike
A001D1	12/2/2015 Outreach	3/18/2016 EIS			O'Mara, Mike
A001C4	12/2/2015 Outreach	3/15/2016 EIS			O'Mara, Mike

ARIES

Referral Date: On ▼ 07/22/2015 and [calendar icon]

Outcome Date: Is Null ▼ [calendar icon] and [calendar icon]

Last Service: [dropdown]

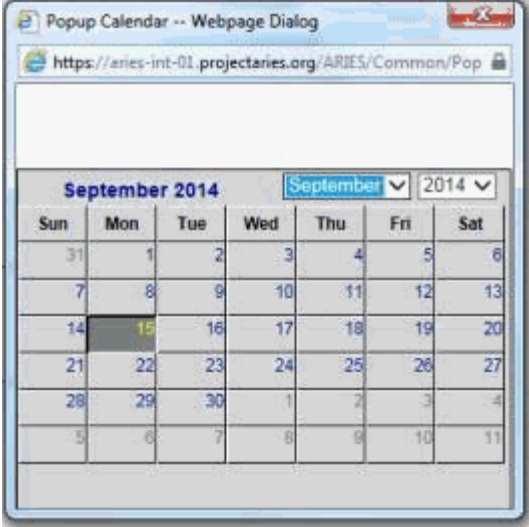
Outcome: [dropdown]

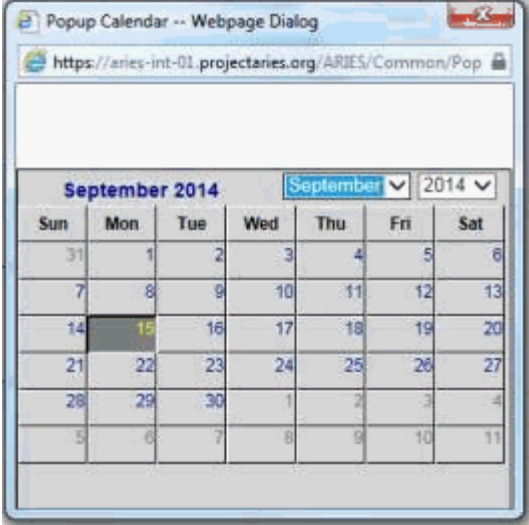
Staff: O'Mara, Mike ▼ **Search**

Name	ARIES ID	ACE ID	Refer Date	Last Service	Outcome Date	Outcome	Staff
Zinger, Clara	100022516		7/22/2015 Outreach	7/22/2015 Part D			O'Mara, Mike
Zinger, Clara	100022516		7/22/2015 Outreach	7/22/2015 Part D			O'Mara, Mike

The top half of the Dashboard displays the **ACE record table**. ACE filters can be used to limit the encounter records displayed in the dashboard table. You can filter the data so that you only see the records you want to see.

Referral Date	<p>This is the date that the encounter was created and corresponds to the required Create New ACE field, "Date of initial contact." You may limit the dashboard encounter display to only records created on a specific date or in a specified date range. For example, selecting "Today" from the Referral date dropdown will display only encounters with a "Date of initial contact" of today. You may also select date indicators of Before, After, On, This week, or Between. Select Search to display records filtered by the specified date criteria. Setting the Referral Date value to blank and selecting Search will display all encounters of all dates.</p> <p>Enter dates using the Month/Day/Year format where month and day can be one or two digits and year must be four digits. You can also click the calendar icon to use the pop-up calendar.</p>
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	 <p>Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically.</p>
<p>Last Service</p>	<p>This is the date of last outreach service and is taken from the ACE Services screen. You may specify any date On, Before, or After a specified date or Between two dates. You may also select records that only have a service for Today or This week. For example, selecting "Today" from the Referral date dropdown will display only encounters with a "Date of last service" of today. You may also select date indicators of Before, After, On, This week, or Between. Select Search to display records filtered by the specified date criteria. Setting the Referral Date value to blank and selecting Search will display all encounters of all service dates including None.</p> <p>Enter dates using the Month/Day/Year format where month and day can be one or two digits and year must be four digits. You can also click the calendar icon to use the pop-up calendar.</p>



Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically.

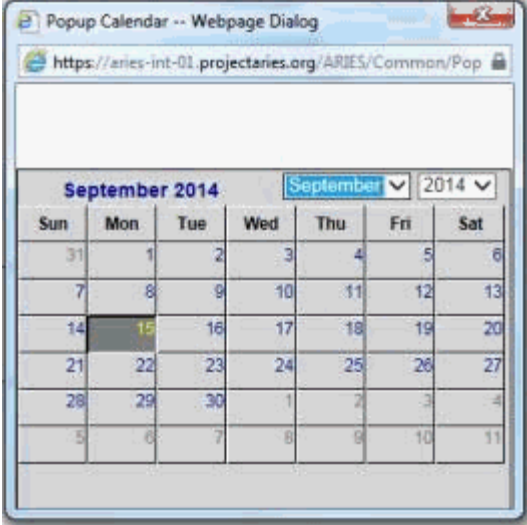
Outcome Date

This is the date associated with an Outcome and is taken from the ACE Referrals screen. Please note that not all ACE records will have an Outcome Date.

You may specify any date On, Before, or After a specified date or Between date ranges. You may also select records that only have a service for Today or This week.

You may limit the dashboard encounter display to only records created on a specific date or in a specified date range. For example, selecting "Today" from the Referral date dropdown will display only encounters with a "Outcome Date" of today. You may also select date indicators of Before, After, On, This week, or Between. Select **Search** to display records filtered by the specified date criteria. Setting the Outcome Date value to blank and selecting **Search** will display all encounters of all Outcome dates, including None.

Enter dates using the Month/Day/Year format where month and day can be one or two digits and year must be four digits. You can also click the calendar icon to use the pop-up calendar.

	 <p>Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically.</p>
<p>Outcome</p>	<p>The Outcome value is taken from the ACE Referral screen and has the following options:</p> <ul style="list-style-type: none"> • Referred to Care • Confirmed to Care • Lost to Follow Up • Relocated • Incarcerated • Deceased • Client Refused • Referred to Prevention Services <p>If, for example, you only want to view ACE records associated with an Outcome of "Incarcerated", then you would select "Incarcerated" from the dropdown and then select Search. The ACE table will present only encounters with an Outcome of "Incarcerated." Setting the Outcome value to blank and selecting Search will display all encounters of all Outcome values including none. Please note that not all ACE records will have an Outcome.</p>
<p>Staff</p>	<p>This is the name of the Staff person entered in the "Refer To Staff" field on the Referrals screen. For ACE records with no referrals, this is the name of the staff person in the Staff field on the Demographics edit screen.</p>

All ACE table column headings are sortable so that you can view records in the order you want to view them. By sorting you can put a column of information in alphabetical, numerical or date order. You can sort in ascending order (alphabetical from A-Z, lowest number to highest number, earliest date to latest date) or descending order (alphabetical from Z to A, highest number to lowest number or latest date to earliest date). You are not able to sort within a sort. That is, whichever column value you sort on will affect the data in the remaining columns. You will not be able to sort, for example "Date Referred to Outreach" by ascending order and sort "Date of Last Service" by descending order.

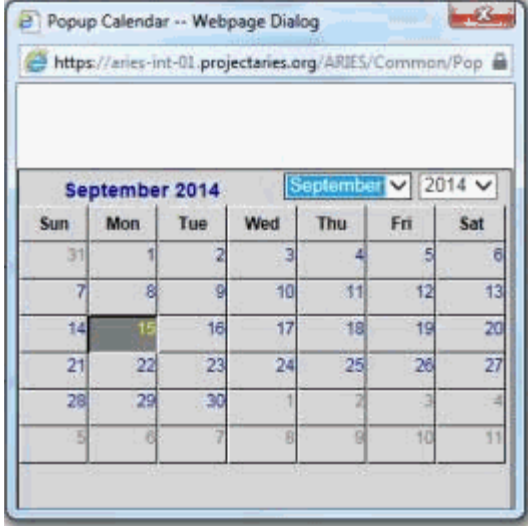
The column that has the sort applied to it is displayed in yellow.

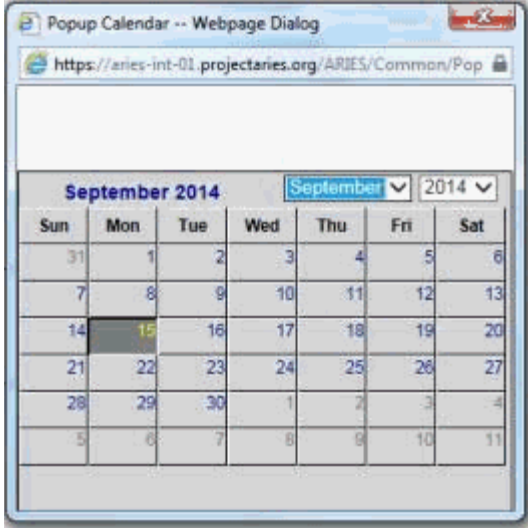
ACE ID	Refer Date	Last Service	Outcome Date	Outcome	Staff
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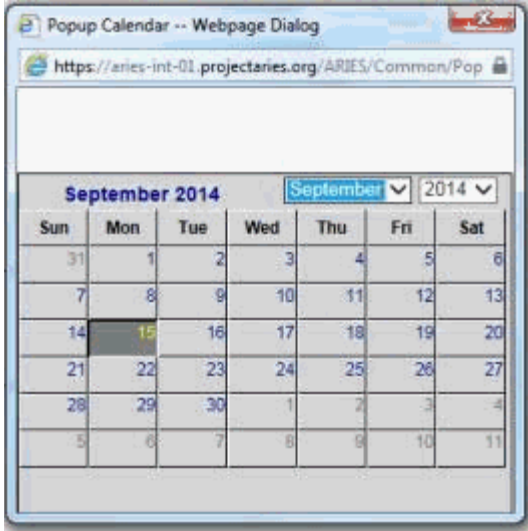
Clicking on another column heading will apply the sort to the selected column of data and change the text of the heading to yellow.

The bottom half of the Dashboard displays the **ARIES record table**. ARIES filters can be used to limit the encounter records displayed in the dashboard table. You can filter the data so that you only see the records you want to see.

Referral Date	<p>This is the date that the ARIES Client was referred to Outreach Services and comes from the date on the ARIES Referrals tab. You may limit the dashboard encounter display to only records with a specific referral date or referral dates in a specified date range. For example, selecting "Today" from the Referral date dropdown will display only records with a "Referral Date" of today. You may also select date indicators of Before, After, On, This week, or Between. Select Search to display records filtered by the specified date criteria. Setting the Referral Date value to blank and selecting Search will display all encounters of all dates.</p> <p>Enter dates using the Month/Day/Year format where month and day can be one or two digits and year must be four digits. You can also click the calendar icon to use the pop-up calendar.</p>
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	 <p>Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically.</p>
<p>Last Service</p>	<p>This is the date of last outreach service and is taken from the ARIES services screen. You may specify any date On, Before, or After a specified date or Between two dates. You may also select records that only have a service for Today or This week.</p> <p>For example, selecting "Today" from the Referral date dropdown will display only encounters with a "Date of last service" of today. You may also select date indicators of Before, After, On, This week, or Between. Select Search to display records filtered by the specified date criteria. Setting the Referral Date value to blank and selecting Search will display all encounters of all service dates including "none."</p> <p>Enter dates using the Month/Day/Year format where month and day can be one or two digits and year must be four digits. You can also click the calendar icon to use the pop-up calendar.</p>

	 <p>Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically.</p>
<p>Outcome Date</p>	<p>This is the date associated with an Outcome and is taken from the ARIES Referrals Screen. Please note that not all ARIES records will have an Outcome Date.</p> <p>You may specify any date On, Before, or After a specified date or Between date ranges. You may also select records that only have a service for Today or This week.</p> <p>You may limit the dashboard encounter display to only records created on a specific date or in a specified date range. For example, selecting "Today" from the Referral date dropdown will display only encounters with an "Outcome Date" of today. You may also select date indicators of Before, After, On, This week, or Between. Select Search to display records filtered by the specified date criteria. Setting the Outcome Date value to blank and selecting Search will display all encounters of all Outcome dates, including None.</p> <p>Enter dates using the Month/Day/Year format where month and day can be one or two digits and year must be four digits. You can also click the calendar icon to use the pop-up calendar.</p>

	 <p>Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically.</p>
<p>Outcome</p>	<p>The Outcome value is taken from the ARIES Referral screen and has the following options:</p> <ul style="list-style-type: none"> • Referred to Care • Confirmed to Care • Lost to Follow Up • Relocated • Incarcerated • Deceased • Client Refused • Referred to Prevention Services <p>If, for example, you only want to view ARIES records associated with an Outcome of "Incarcerated", then you would select "Incarcerated" from the dropdown and the select Search. The ARIES table will present only records with an Outcome of "Incarcerated." Setting the Outcome value to blank and selecting Search will display all records of all Outcome values including None. Please note that not all ARIES records will have an Outcome.</p>
<p>Staff</p>	<p>This is the name of the staff person in the Staff field on the Demographics edit screen. Select a staff name and Search to display records associated with the select staff.</p>

All ARIES table column headings are sortable so that you can view records in the order you want to view them. By sorting you can put a column of information in alphabetical, numerical or date order. You can sort in ascending order (alphabetical from A-Z, lowest number to highest number, earliest date to latest date) or descending order (alphabetical from Z to A, highest number to lowest number or latest date to earliest date). You are not able to sort within a sort. That is, whichever column value you sort on will affect the data in the remaining columns. You will not be able to sort, for example "Date Referred to Outreach" by ascending order and sort "Date of Last Service" by descending order.

The column that has the sort applied to it is displayed in yellow.

Name	ARIES ID	ACE ID	Refer Date	Last Service	Outcome Date	Outcome	Staff
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6.2 Looking up an ACE Record

Outreach workers with the proper permissions may search ARIES to determine if an Anonymous Client Encounter record has already been entered into ARIES. To search for an ACE record select **Find > ACE Record** from the ARIES Menu Bar at the top of the ARIES screen. The ACE Record Search screen is displayed.

ACE Record Search

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

ACE ID
Hispanic
Race
Gender
Date of Birth
County
Encounter Date **and**
Outcome Date **and**
Outcome
Staff
Display **results**
 Include Linked Records

Search Filters

You may search for any client registered at your agency. You can limit the search results by using one of the following filters: ACE ID, Hispanic, race, gender, date of birth, county,

encounter date, outcome date, outcome, staff, or by including linked records. Most ARIES search screens present you with several filter options. For example, in an encounter search, filters include race, gender, and encounter information. Keep in mind that the more filters you add, the narrower your search results. Conversely, if you leave all filter fields empty, ARIES will return all records that pertain to the search.

To Search by ACE ID

Enter the ID associated with the encounter in the ACE ID text field. ACE record IDs are unique identifiers assigned by the ARIES system when a new ACE record is saved. Click the **Search** button. The results appear in the ACE Search Results screen. If only one record matches your search criteria, ARIES takes you directly to the Demographics read-only screen for the matching record. If there are no records that match the search criteria, the ACE Record Search screen redisplay, giving you an opportunity to search again with more detailed information. If multiple matches are found, you are taken to the ACE Record Search Result screen (displayed under the ACE Record Search Results section below), which lists all encounters that match your search. If none of the results match the encounter you're searching for, click **New Search** to search again with more detailed information.

To Search by Hispanic

Select Yes or No from the **Hispanic** dropdown. Click the **Search** button. The results appear in the ACE Search Results screen. If only one record matches your search criteria, ARIES takes you directly to the Demographics read-only screen for the matching encounter. If no records match the search criteria, the ACE Record Search screen redisplay, giving you an opportunity to search again with more detailed information. Please note that if you only select Hispanic Yes or Hispanic No, it is likely that a large number of records will be returned. If multiple matches are found, you are taken to the ACE Record Search Result screen (displayed under the ACE Record Search Results section below), which lists all encounters that match your search. If none of the results match the encounter you're searching for, click **New Search** to search again with more detailed information.

To Search by Race

Select the desired **Race** from the Race dropdown. Click the **Search** button. The results appear in the ACE Record Search Results screen. If only one record matches your search criteria, ARIES takes you directly to the Demographics read-only screen for the matching encounter. If no records match, then the ACE Record Search screen redisplay, giving you an opportunity to broaden your search.

To Search by Gender

Select the desired **Gender** from the dropdown. Click the **Search** button. The results appear in the ACE Record Search Results screen. If only one record matches your search criteria, ARIES takes you directly to the Demographics read-only screen for the matching encounter. If no records match, then the ACE Record Search screen redisplay, giving you an opportunity to broaden your search.

To Search by Date of Birth

Enter the Date of Birth using the Month/Day/Year format where month and day may be one or two digits and year is four digits. Example: To specify a DOB of September 27, 1968, enter, "9/27/1968." Alternatively, you may use the calendar icon to select the birthdate. Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically.

Click the **Search** button. The results appear on the ACE Encounter Search Results screen. If only one record matches your search criteria, ARIES takes you directly to the Demographics read-only screen for the matching encounter. If the record does not match the encounter you are searching for, the ACE Record Search screen redisplay, giving you an opportunity to search again with more detailed information. If multiple matches are found, you are taken to the ACE Record Search Result screen (displayed under the ACE Record Search Results section below), which lists all records that match your search. If none of the results match the encounter you're searching for, click **New Search** to search again with more detailed information.

To Search by County

Select the desired county from the dropdown. Click the **Search** button. The results appear in the ACE Record Search Results screen. If only one record matches your search criteria, ARIES takes you directly to the Demographics read-only screen for the matching encounter. If no records match, then the ACE Record Search screen redisplay, giving you an opportunity to broaden your search. Please note that while you may select

a county other than the one you are based in, your results will be limited only the clients served by your agency.

To Search by Encounter Date

You can filter the view of encounters by selecting a date or date range during which you think the encounter occurred. Enter the date you wish to filter by in the first text field using the Month/Day/Year format where month and day may be one or two digits and year is four digits. e.g., for August 2, 2010, enter 8/2/2010. Alternatively, click the calendar icon to use the pop-up calendar. Use the dropdown lists to select the month and year. Click the day and date displays in the text field. The pop-up calendar window closes automatically. To filter for records on a given day, select **On** from the dropdown list and enter a specific date, e.g. 8/2/2010, in the first text field. Leave the second text field empty.

To filter for records prior to, but not including, a given day, select **Before**. Enter the date, e.g. 8/2/2010, in the first text field and leave the second text field empty. This will retrieve records dated before midnight on August 2, 2010. To filter for records on and after a specific date, select **After**. This will include records for the date entered. For example, entering 8/2/2010 in the first text field and clicking **Search** will display all the records dated August 2, 2010 and all the days following it. For this option, leave the second text field empty.

To filter a range of dates, select **Between** from the dropdown list and enter in the beginning of date in the first text field and the ending date in the second text field. Your viewed results will include all records from 12:00 AM on the first date to 11:59 PM on the second date. For example, entering 8/2/2010 in the first text field and 8/7/2010 in the second text field and clicking **Search** will display all records on August 2, 2010 through August 7, 2010.

To Search by Outcome Date

You can filter the view of encounters by selecting a date or date range during which you think a referral has an outcome date. The filter searches the ACE Referral Outcome date

field for matching values. Enter the date you wish to filter by in the first text field using Month/Day/Year format where month and day may be one or two digits and year is four digits. e.g., for August 2, 2010, enter 8/2/2010.

Alternatively, you can also click the calendar icon to use the pop-up calendar. Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically. To filter for records on a given day, select **On** from the dropdown list and enter a specific date, e.g. 8/2/2010, in the first text field. Leave the second text field empty. Select **Before** to sort through all entries before, but not including, that specific date. Enter the date, e.g. 8/2/2010, in the first text field and leave the second text field empty. This will retrieve records dated before midnight on August 2, 2010. Select **After** to bring up all records dated after a specific date, including records dated that day. For example entering 8/2/2010 in the first text field clicking **Search** will display all the records dated August 2, 2010 and all the days following it. For this option, leave the second text field empty.

To filter a range of dates, select **Between** from the dropdown list and enter in the beginning of date in the first text field and the ending date in the second text field. Your viewed results will include all records from 12:00 AM on the first date to 11:59 PM on the second date. For example, entering 8/2/2010 in the first text field and 8/7/2010 in the second text field and clicking **Search** will display all records on August 2, 2010 through August 7, 2010.

To Search by Outcome

Select the desired referral outcome value from the dropdown. Options include

- Kept appointment
- No Show
- Reschedules appointment
- Referred to Care
- Confirmed to Care
- Lost to Follow Up
- Relocated
- Incarcerated
- Deceased
- Client Refused and
- Referred to Prevention Services

Click the **Search** button. The results appear in the ACE Record Search Results screen. If only one record matches your search criteria, ARIES takes you directly to the Demographics read-only screen for the matching encounter. If no records match, then the ACE Record Search screen redisplay, giving you an opportunity to broaden your search.

To Search by Staff

Select the desired Staff name from the dropdown. Use this dropdown list to filter the view of encounters by the staff person who provided them. If you make no selection, encounters by all staff members are displayed. The Staff dropdown options are agency specific and consists of a list of all staff in the user's agency. Click the **Search** button. The results appear in the ACE Record Search Results screen. If only one record matches your search criteria, ARIES takes you directly to the Demographics read-only screen for the

matching encounter. If no records match, then the ACE Record Search screen redisplay, giving you an opportunity to broaden your search.

To Include Linked Records

Select the "Include Linked Records" check box to include clients who have ACE encounters as well as records that are linked to an ARIES Client. If an encounter is associated with an ARIES Client, an ARIES Client ID link will appear in the search results. Selecting the link will direct the user to ARIES client tabs. Click the **Search** button. The results appear in the ACE Record Search Results screen. If only one encounter matches your search criteria, ARIES takes you directly to the Demographics tab for that encounter. If no records match your search criteria, the ACE Record Search screen redisplay, giving you an opportunity to search again with more detailed information.

If multiple matches are found, the ACE Record Search Results screen displays (see ACE Records Search Results section below for an example), which lists all encounters that match your search. If none of the results match the encounter you're searching for, click **New Search** to search again with more detailed information.

To Specify Number of Results

You can specify the number of results to return on your search; the more results you ask for, the longer the search takes. The default is set at 20, which will typically fill the results screen. To increase or decrease the number of results displayed in the search screen, place your cursor in the **Display** field and type a number.

To Search Other Agencies

If you are at an administrative agency, you may search for ARIES clients at all the agencies you administer, but ACE Records are all non-share records. This means that Agency Emulation will need to be used if you want to search for encounters at a particular agency under your purview.

6.3 ACE Record Search Results

When you click the **Search** button on the ACE Record Search screen, ARIES looks up all the encounters that match all your criteria and then displays them on the ACE Search Results screen (shown in the following screen shot). If there is only a single result for your search, you will be taken to the ACE Demographics screen for that encounter.

ACE ID	ARIES ID	Hispanic	Race	Current Gender	DOB	County	Date of Last Encounter
A00023		Yes	White	Male	2/25/1945	Anderson	2/25/2015
A00061		Yes	White	Female	1/1/1990	Alameda	2/25/2015
A00073		No	White	Male	1/1/1990	Placer	2/26/2015

3 records displayed

New Search Display 3 Create New 3 records displayed

The search results are listed in a table, by ACE ID in numerically ascending order. All ARIES table column headings are sortable so that you can view records in the order you want to view them. By sorting you can put a column of information in alphabetical, numerical or date order. You can sort in ascending order (alphabetical from A-Z, lowest

number to highest number, earliest date to latest date) or descending order (alphabetical from Z to A, highest number to lowest number or latest date to earliest date). You are not able to sort within a sort. That is, whichever column value you sort on will affect the data in the remaining columns. The column that has the sort applied to it is displayed in yellow.

The table also displays the client's ARIES ID if the encounter is linked to an ARIES Client record, Hispanic, Race, current gender, date of birth, county, and date of last encounter. The encounter date is taken from the encounter records service table. Clicking an Encounter ID takes you to that individual's ACE Demographics screen.

If your search didn't find the encounter you were looking for, you can increase the number of results displayed by entering a new number in the text field to the right of the **Display** button in the Client Search Result screen, and then clicking the **Display** button. If you still can't find the encounter you are searching for, try a new search using fewer criteria by clicking the **New Search** button.

To create a new encounter, click the **Create New** button, which will take you to the [Create New ACE](#) screen. You will learn how to create new ACE records in the following section.

6.4 Adding a New ACE Record

Once you have determined that an encounter is not in the system, you can create a New Anonymous Client Encounter record. Since ACE records are editable, you can either enter all related sections at the same time as you create a new record, or at a later date. The only two required pieces of data for creating a New ACE record are Date of Initial Contact, which defaults to today's date, and County of Residence. Note: There is no sharing of ACE record information with other agencies.

From the ACE Record Search results screen, click on **Create New**, which takes you to the Create New ACE screen.

Create New ACE

Date of Initial Contact 4/17/2015

County of Residence [dropdown]

Hispanic [dropdown]

Nat'l Orig/Ethnic. [dropdown]

Race [dropdown]


Date of Birth [calendar icon]


Current Gender [dropdown]

Staff Blake, Betty



Save **Cancel**

Complete the fields as follows:

<p>Date of Initial Contact</p>	<p>The value defaults to today's date. To change the Date of Initial Contact, use the format Month/Day/Year where month and day may be one or two digits and year is four digits. Example: For August 22, 2011 you would enter 08/22/2011.</p> <p>You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p>
<p>County of Residence</p>	<p>Use the dropdown to select the County of Residence that applies to the client whose encounter data is being entered. If you cannot determine the county, select "Unknown" from the dropdown.</p>
<p>Hispanic</p>	<p>Use the dropdown to select Yes, No or Unknown.</p>
<p>Nat'l Orig/Ethnicity</p>	<p>If you select No or Unknown for Hispanic, then this field will be greyed out. If you select Yes for Hispanic then you can use the dropdown to select an applicable national origin or ethnicity.</p>
<p>Race</p>	<p>Enter the last name of the client.</p>

<p>Date of Birth</p>	<p>Use the format Month/Day/Year where month and day may be one of two digits and year is four digits. Example: For August 22, 2011 you would enter 8/22/2011.</p> <p>You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.</p> <p>Please note that date of birth must be between 1/1/1900 and today's date. Other entries will produce an error.</p>
<p>Current Gender</p>	<p>Use the dropdown list to choose the appropriate gender. In addition to male and female, a client may be transgender MTF (male-to-female) or transgender FTM (female-to-male). Gender may also be listed as "Other," "Unknown," or "Refused to Report."</p>
<p>Staff</p>	<p>Use the dropdown list to choose the appropriate staff member. The list will be agency specific and contain the names of the Staff assigned to your agency.</p>

When you have completed your entries:

	Click this button to save your input and return to the read-only Demographics screen, which is updated with the data entered. A system-assigned ACE ID number is displayed for the new Encounter.
	Click this button to discard your entries and return to the ACE Record Search screen.

6.4.1 ACE Demographics

The Client Demographics screens shows a client's personal information that was entered when the ACE record was created or edited. It also displays the ACE ID that was generated at the time the record was created. To access the Demographics screen for an ACE record, Search for an ACE Record, and select the Encounter you want to Edit. The system will display the Demographics tab, the first of four ACE tabs.

County of Residence: Winkler
Staff: Mike O'Mara

Selecting **Edit** on the Demographics tab displays the ACE Demographics Edit screen for the selected record. In addition to the Create ACE record variables, the Demographics Edit also include six race identifiers. All Race selections are optional. Updating the variables that were entered at the time the ACE record was created will not change the ACE ID.

ACE A00053 Demographics Edit

ACE ID: A00053

Date of Initial Contact * 2/25/2015

Date of Birth 2/25/1945

Current Gender Male

Hispanic Yes

Race

1 White

2 American Indian or Native Alaskan

3 Asian

County of Residence * Anderson

Staff Martin, Jenny



Nat'l Orig/Ethnic.

Mexican/Mexican-American

African American Black

African Black

Alaskan Native

6.5 ACE Services

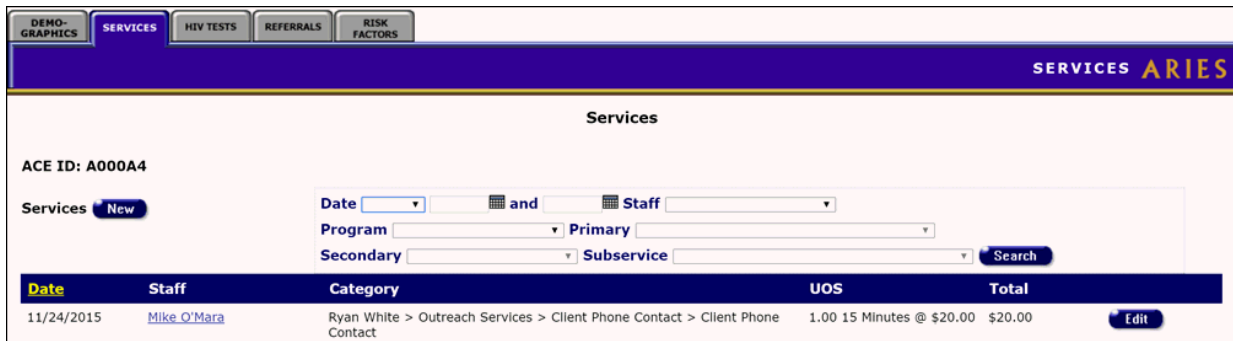
Agencies provide outreach services for clients. Services can include Outreach Services, Treatment Education, Early Intervention Services (which may include HIV Testing), or other services related to HIV/AIDS Outreach services. ARIES manages and tracks services to help automate budgeting, create reports, and provide quality care for clients.

Each service must be entered as a separate service line item. This is done to track individual services for reporting purposes. Wherever possible, ARIES pre-fills text fields to make data entry quick and simple. Staff members enter new service line items after an encounter has been entered into the ARIES system. Please note that services cannot be dated prior to the ACE client's "Date of First Contact" and an ACE client's "Date of First Contact" cannot be after the date of any existing services.


To access the Services screen for an ACE record:

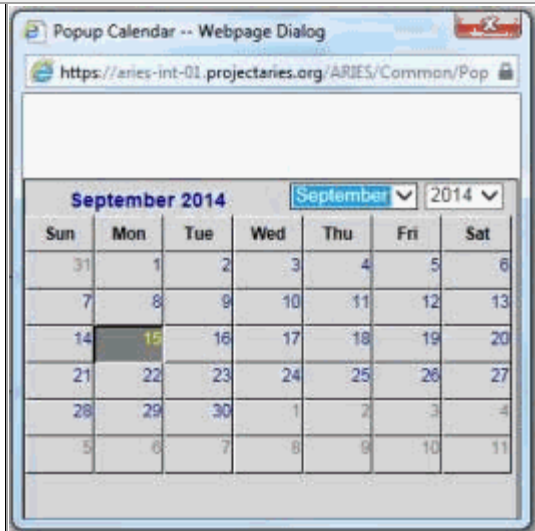
- Search for an ACE Record
- Select the Encounter you want to Edit.
- Click the Services tab next to the Demographics tab.

The Services screen lists all the services a client has received in a table. Filter the view of services for an encounter record by selecting a date or date range, the staff person who provided the services, the program under which services were provided, the primary and secondary service categories, and any sub-services.



Complete the fields as needed:

	<p>Click this button to record a new service for the encounter on the Service Edit page.</p>
<p>Date Filters</p>	<p>Enter the date you wish to filter by in the first text field using the Month/Day/Year format where month and day can be one or two digits and year is four digits (e.g., for August 2, 2010, enter 8/2/2010). You can also click the calendar icon to use the pop-up calendar.</p>




Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically.

To filter for records on a given day, select **On** from the dropdown list and enter a specific date, e.g. 8/2/2010, in the first text field. Leave the second text field empty. Select **Before** to sort through all entries before, but not including, that specific date. Enter the date, e.g. 8/2/2010, in the first text field and leave the second text field empty. This will retrieve records dated before midnight on August 2, 2010.

Select **After** to bring up all records dated after a specific date, including records dated that day. For example entering 8/2/2010 in the first text field clicking **Search** will display all the records dated August 2, 2010 and all the days following it. For this option, leave the second text field empty.

To filter a range of dates, select **Between** from the dropdown list and enter in the beginning of date in the first text field and the ending date in the second text field. The results will include all records from 12:00 AM on the first date to 11:59 PM on the second date. For example, entering 8/2/2010 in the first text field and 8/7/2010 in the second text field and

	clicking Search will display all records on August 2, 2010 through August 7, 2010.
Staff	Use this dropdown list to filter the view of services by the staff person who provided them. If you make no selection, services by all staff members are displayed.
Programs	Use this dropdown list to filter the view of services by program. When you select a program, the corresponding primary services populate the Primary dropdown list. If you make no selection, all services are displayed and the Primary dropdown list is not populated.
Primary	Use this dropdown list to filter the view of services by primary service. When you select a primary service, the corresponding primary services populate the Secondary dropdown list. If you make no selection, all primary services for the program selected (if any) are displayed and the Secondary dropdown list is not populated.
Secondary	The secondary service provided to the client.
Subservices	Agency-defined subservice provided to the client.
Date	The date the service was provided. This column of data is sortable.
Staff	The staff person who provided the service. This column of data is sortable.
Category	The type of service the client received, listed by program, primary service, secondary service and, if applicable, agency defined subservice. For example, a dental exam may be listed as "Ryan White > Oral Health Care > Routine Treatment" where "Ryan White" is the program, "Oral Health Care" is the primary service, and

	"Routine Treatment" is the secondary service. This column of data is sortable.
UOS	Units of service the client received under the associated category, and the cost of each unit of service. For example, a day's worth of meals may be listed as "2 meals @ \$7." This column of data is sortable.
Total	The total cost of the service. The column of data is sortable.
	Click this button to edit the service on a given row on the Services Edit screen.

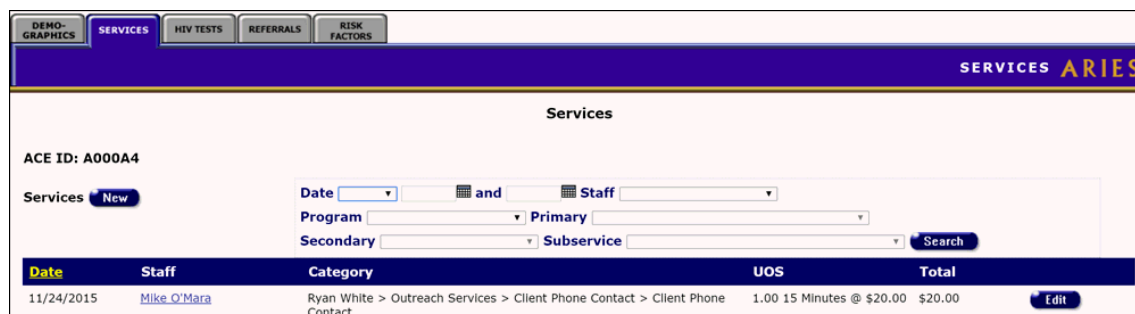
6.5.1 Recording or Editing an ACE Service

Agencies provide clients with services which may include Outreach Services, Treatment Education, EIP (Early Intervention Services) or other services related to HIV/AIDS Outreach services. ARIES manages and tracks these services to help automate budgeting, create reports, and provide quality care for clients.

Each service must be entered as a separate service line item, to track individual services for reporting purposes. Wherever possible, ARIES pre-fills text fields to make data entry quick and simple. The default unit of service (UOS) for most service categories is "15 minutes." However, some service categories have different units of measurement such as "test" or "visit." Because the "Other Services" categories are a mixture of diverse services, the units of measurement are varied. Please note that services cannot be dated prior to the ACE client's "Date of First Contact" and an ACE client's "Date of First Contact" cannot be after the date of any existing services.

Entering a New Service

Do a Search for and select an ACE record to access the Services screen.



The screenshot shows the SERVICES ARIES interface. At the top, there are navigation tabs: DEMO-GRAPHICS, SERVICES (selected), HIV TESTS, REFERRALS, and RISK FACTORS. Below the tabs is a header bar with "SERVICES ARIES". The main content area is titled "Services" and displays "ACE ID: A000A4". There is a "Services" section with a "New" button. Below this are search filters for "Date", "Staff", "Program", "Primary", "Secondary", and "Subservice", with a "Search" button. At the bottom, there is a table with columns: Date, Staff, Category, UOS, and Total. The table contains one row of data: 11/24/2015, Mike O'Mara, Ryan White > Outreach Services > Client Phone Contact > Client Phone Contact, 1.00 15 Minutes @ \$20.00, and \$20.00. An "Edit" button is located at the end of the row.

Click the New button in the upper left-hand corner of the screen to bring up the New Service screen. Some information is pre-filled by default but can be changed.

ACE Services Edit

ACE ID: A00013

Staff: Site:

Date of Service: Days to Next Service: date:

Contract Name: Created Date:

Program:

Primary Service:

Secondary Service:

Agency Subservice:

Units of Service: @ \$ per = \$ Total

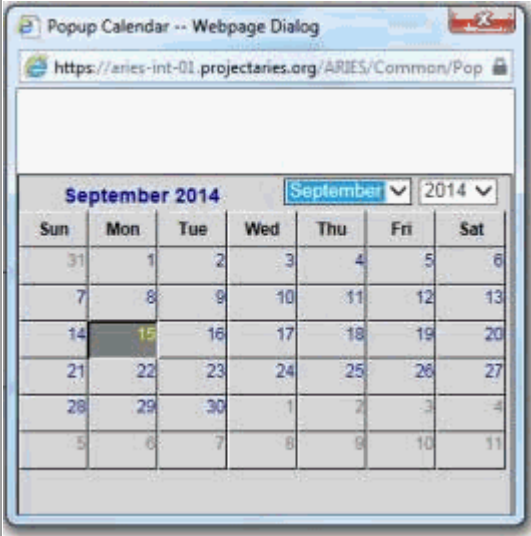
Client Payment: CARE/HIPP Co-Payment


Actual Minutes Spent:

Service Notes:

Finalize (record will be uneditable after changes are saved)

Complete the fields as follows. Fields marked with a red asterisk(*) are required.

Staff	Use the Staff dropdown to select the staff person responsible for the service. Your name is the pre-selected choice, but if you are entering data on behalf of someone else, you should select the name of the person providing the service.
Site	If your agency has multiple sites, use the Site dropdown to select the location where the service was provided.
Date of Service	<p>Enter the date the service was administered. Use the Month/Day/Year format where month and day can be one or two digits and year must be four digits. Example: For May 25, 2011 you would enter 05/25/2011.</p> <p>You can also use the calendar pop-up by clicking the calendar icon.</p> 

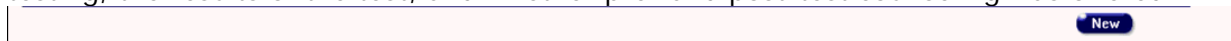
	Use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes.
Days to Next Service	<p>Enter the number of days until the client is scheduled to receive their next service.</p> <p>Example: If the client needs a follow-up visit after three months, enter 90 in the Days to Service field. The date is automatically calculated and entered in the Date field.</p> <p>Similarly, if you enter the date in the Date field, the number of days is automatically calculated and entered in the Days to Next Service field.</p> <p>The Days to Next Service can be used as a reminder or to-do item for this client.</p>
Contract Name	Use the dropdown to select the contract name. Your choice determines what will appear in the subsequent Program, Preliminary Service, Secondary Service, and Agency Subservice dropdown lists.
Program	<p>Use the dropdown to select the type of program (e.g., Ryan White).</p> <p>Services are organized in four tiers: Program, Primary Service, Secondary Service, and Agency Subservice. The dropdown selection you choose at one tier fills in the available services at lower tiers.</p>  <p>Example: If a client is eligible for services under your agency's Medicare contract, select the Medicare contract from the Program dropdown list. As a result of this selection, only the services available under that contract will be displayed in the service dropdown lists.</p> <p>Note: A program will not display in the program dropdown field unless a contract exists for that program and the date range of the contract covers the service date you entered.</p>
Primary Service	<p>Use the dropdown to select the primary service. Your choice determines what will appear in subsequent service dropdown lists.</p> <p>Example: If you select Mental Health Services from the Primary Service dropdown, the Secondary Service dropdown will list only the mental health services your agency provides.</p>
Secondary Service	Use the Secondary Service dropdown to select the secondary service.

	<p>Choosing a secondary service fills the Agency Subservice dropdown with the specialized subservices your agency offers. Again, only those services specified in the contract setup will be shown.</p> <p>If the service line item is medication, the HRSA Drug Code dropdown list appears in the form. Select the code that corresponds to the client's medication. Each line in the dropdown lists the medication's brand name, generic name, and HRSA drug code.</p>
Agency Subservice	Use the Agency Subservice dropdown to select the agency subservice.
Units of Service	<p>The default values for the Units of Service, Cost, per, and Total text boxes automatically fill in when you enter a service type.</p> <p><u>Changing the costs and unit quantities</u></p> <p>You can change the costs and unit quantities. Example: An intake, which is measured in quarter hour visits, may normally take 3 hours, or 12 units. The units default to 12 when you choose a subservice. However, if you have a particularly lengthy intake that takes four hours, you would replace the "12" with "16" and the total would recalculate in the Total text field.</p> <p><u>Services not calculated by units of service</u></p> <p>For services not calculated by units of service, leave the Cost text field empty and enter the actual cost of the service in the Total text field.</p> <p>Examples:</p> <p>One-way trips might be reimbursed by mileage. The unit of service is one but a one-way trip could be several miles so the Cost text field is left empty and the actual cost of the service is entered in the Total text field.</p> <p>For medication, the unit of service is by prescription. A 100-pill prescription is still one unit of service, so enter the cost of the medication in the Total text field.</p>
Actual Minutes Spent	Enter the amount of time used for an appointment in the Actual Minutes Spent text field. Example: If a consultation lasted 35 minutes, even if it was scheduled for an hour, enter 35. This does not affect the reimbursement process, but it is used for internal reports and scheduling.
Services Notes textbox	Use the Service Notes text box to enter any other details pertaining to the service line item, including any additional payment sources.
Finalize	<p>Select the Finalize checkbox to prevent the record from being edited further once you have saved it.</p> <p>Note: Once the box is checked, it can never be edited again.</p>

6.6 ACE HIV Tests

The HIV Tests screen appears first when you click the HIV Tests tab. This screen contains a longitudinal record of the HIV tests associated with a particular encounter.

This table lists the client's HIV testing history including when and where they received testing, the results of the test, and whether pre- and post-test counseling was offered.



Use the HIV Tests section of the screen to edit existing HIV test information, or to add new test information.

- To add new HIV test information, click the **New** button.
- To edit existing HIV test information, click the **Edit** button.

Both actions put the HIV Tests screen into Edit mode.

ACE HIV Test Edit

ACE ID: A00073

HIV Test Date

Result

County

State

Source

Pre-test Counseling




Post-test Counseling

Complete the fields as follows:

HIV Test Date	Enter the date of the client's HIV test. Use the format MM/DD/YYYY where month and day can be one or two digits and year is four digits. Or use the pop-up calendar.
Result	From the dropdown, select the result of the client's HIV test.
County	Enter the name of the county in which the HIV test was performed.
State	From the dropdown, select the state in which the HIV test was performed.
Source	Enter the source by which the client's HIV test date was reported, e.g., Letter Clinic.

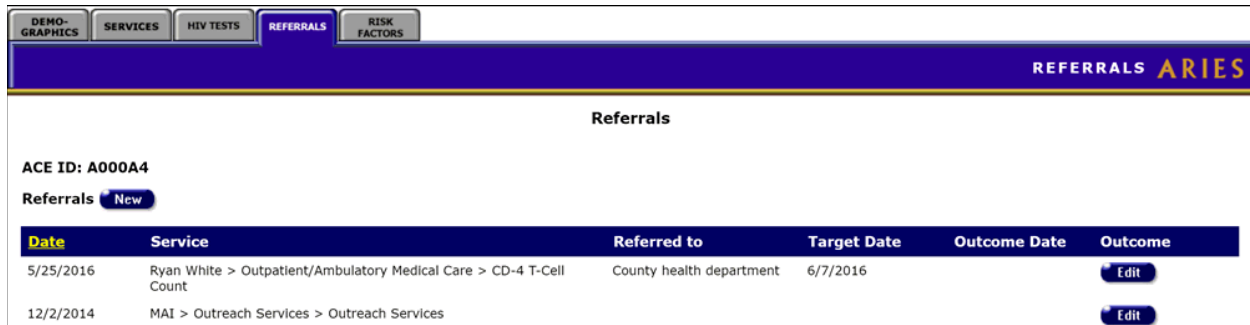
Pre-test Counseling	Use the dropdown to indicate whether pre-test counseling was offered and, if so, the date of offer. You may type the date (format Month/Day/Year where month and day may be one or two digits and year is four digits) in the text window or use the pop-up
Post-test Counseling	Indicate whether post-test counseling was offered and, if so, the date of offer. You may type the date (format Month/Day/Year where month and



When you have completed your entries:

	Click the Save button to store your changes to ARIES and return to the HIV Tests screen, where your new entries are now displayed.
	Click Cancel to return to the Basic Medical Edit screen without saving changes.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.

6.7 ACE Referrals



Referrals are used to help clients access services either at your agency or at another agency. ACE interagency referrals allow the user to refer a client to another staff person within the same agency. The referral will then appear on the Outreach Services dashboard. To navigate to the Referrals screen search for and select the encounter you would like to view, then click on the Referrals tab on the encounter information tab strip.



Date	Service	Referred to	Target Date	Outcome Date	Outcome
5/25/2016	Ryan White > Outpatient/Ambulatory Medical Care > CD-4 T-Cell Count	County health department	6/7/2016		
12/2/2014	MAI > Outreach Services > Outreach Services				

The screen displays a table of all referrals associated with an encounter.

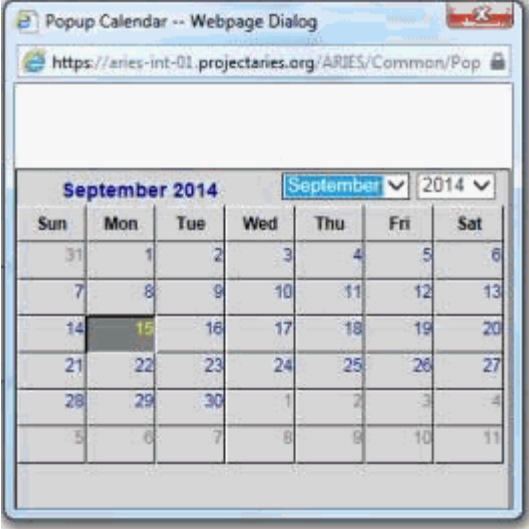
Date	This is the date when the referral was made.
Service	Indicates what type of service the client needed.
Referred To	This is the agency to which the client was referred to.



Target Date	Estimated date when the client was to receive the referred services.
Outcome Date	This is the date of the referral outcome.
Outcome	This is the outcome of the referral; whether the client attended their appointment with the other agency or not. It does not specify whether the client successfully received services.
	To create a new referral, click the New button. This action will display the Referrals screen in Edit mode.
	To edit an existing referral, click the Edit button. This action will display the Referrals screen in Edit mode.


The ACE Referral Edit Screen:

Complete the Referrals Edit fields as follows:

Referral Date	Enter the date the referral was made. Use the format Month/Day/Year. You can also use the pop-up calendar. Click the calendar icon to bring up the calendar.
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	 <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the text field. The calendar window closes automatically.</p>
Referred By	Select a name from the dropdown, which lists staff for the agency creating the referral.
Program	<p>Use the dropdown to select the program covering the needed service. The program you choose affects what displays in subsequent dropdown lists. Example:</p> <p>If you select "Ryan White," only services covered by the Ryan White program will display in the Primary Service dropdown list.</p>
Primary Service	<p>Use the dropdown to select the primary service the client needs. What displays in this dropdown list depends on which program was selected. If you do not see the service listed, make sure you have selected the proper program.</p> <p>The primary service you select determines what secondary services display in the next dropdown list. Selecting a primary service activates the Secondary Service dropdown.</p>
Secondary Service	As necessary, use the dropdown to select the secondary service the client requires.
Referral Type	Select the type of agency or service to which the client is being referred. If it is not listed in the dropdown, select "Other."
Referral Type (other)	If you selected "Other" from the Referral Type dropdown list, enter the type of agency in the text field.

Refer to Agency	<p>Use the dropdown to select the agency the client is being referred to. If you select your own agency, a Refer to Staff dropdown will appear with a list of all the Outreach Workers at your agency. Referrals made to a staff person at the referring agency will show up on the Outreach Worker dashboard.</p> <p>Note: Deactivated agencies do not appear in the dropdown list.</p>
Refer To Staff	<p>Selecting the user's agency as the Refer to Agency value will cause a Refer To Staff field to appear which is populated with Outreach Worker staff from the user's agency.</p> <p>Intra-agency referrals will show up on the Outreach Worker Dashboard.</p>
Target Date	<p>Enter the expected appointment date. You can also use the pop-up calendar icon.</p>
Follow-Up Date	<p>If you change information in the referral or enter outcome information, enter the date the follow-up was made. You can also use the pop-up calendar icon.</p>
Reason	<p>In this text box, enter the reason the client was referred to another agency. Example:</p> <p>If there were no available counselors at your agency, and the</p>
Outcome Date	<p>When you perform a follow-up to the referral and you have confirmed its outcome, enter the date in this text field using the Month/Day/Year format where month and day may be one or two digits and year is four digits. You can also use the pop-up calendar icon.</p>
Outcome	<p>When you perform a follow-up to the referral and you have confirmed its outcome, select the result of the referral from the dropdown list, (e.g., client kept the appointment, was a no-show, or the appointment was rescheduled).</p> <p>Once an outcome is entered, only users with appropriate permissions can enter text in the Notes field. See "Outcome Date"</p>
Notes	<p>Enter any additional notes regarding the referral in this text box.</p> <p>Please note that identifying information (such as the client's name or address) or information about a client's substance use and mental health should not be entered in the Notes field.</p>
	<p>Click this button to save your input and return to the read-only Referral screen.</p>
	<p>Click this button to return to the read-only Referral screen without saving your input.</p>

	<p>Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended.</p> <p>This option is only available to users with the appropriate</p>
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6.7.1 Risk Factors

DEMO-GRAPHICS
SERVICES
HIV TESTS
REFERRALS
RISK FACTORS
RISK FACTORS **ARIES**

Risk Factors

ACE ID: A000A4 Edit

Pediatric: No

Factors (behaviors client engaged in prior to first HIV+ test result):

<p>Client Risk Factors:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Sex with Male <input type="checkbox"/> Sex with Female <input type="checkbox"/> Injected nonprescription drugs <input type="checkbox"/> Received clotting factor for hemophilia/coagulation disorder <input type="checkbox"/> Received transfusion of blood/blood components (other than clotting factor), transplant of tissue/organs or artificial insemination <input type="checkbox"/> Worked in healthcare or clinical lab setting <input type="checkbox"/> Mother HIV Infected/Perinatal transmission <input type="checkbox"/> Sexual abuse (pediatric only) <input type="checkbox"/> Other <input type="checkbox"/> Unknown 	<p>Sex Partner Risk Factors, Heterosexual Contact ONLY:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Intravenous/injection drug user <input type="checkbox"/> Bisexual Male <input type="checkbox"/> Person with AIDS or documented HIV <input type="checkbox"/> Other (person with hemophilia/coagulation disorder, transfusion recipient with documented HIV infection, Transplant recipient with documented HIV infection) <input type="checkbox"/> Unknown
---	---

Factors

On the left is a checklist listing the high-risk behaviors the client engaged in before they received their first positive HIV test result. These behaviors may or may not have contributed to the client's HIV infection. A checkmark appears next to each selected factor.

Sex Partner Risk Factors, Heterosexual Contact Only

On the right is a checklist regarding the risk factors of the client's heterosexual partners before the client's first positive HIV test result. Note that Heterosexual Contact is a risk factor only if the client's heterosexual partner was known to be at-risk or infected.

To change or edit a client's risk factors click the **Edit** button, which takes you to the Risk Factors Edit screen.

ACE Risk Factors Edit

Pediatric

What behaviors did the client engage in prior to his/her first HIV positive test result? Check all that apply:

<input type="checkbox"/> Sex with Male <input type="checkbox"/> Sex with Female <input type="checkbox"/> Injected nonprescription drugs <input type="checkbox"/> Received clotting factor for hemophilia/coagulation disorder <input type="checkbox"/> Received transfusion of blood/blood components (other than clotting factor), transplant of tissue/organs or artificial insemination <input type="checkbox"/> Worked in healthcare or clinical lab setting <input type="checkbox"/> Mother HIV infected/Perinatal transmission <input type="checkbox"/> Sexual abuse (pediatric only) <input type="checkbox"/> Other <input type="checkbox"/> Unknown	<input type="checkbox"/> Intravenous/injection drug user <input type="checkbox"/> Bisexual Male <input type="checkbox"/> Person with AIDS or documented HIV <input type="checkbox"/> Other (person with hemophilia/coagulation disorder, transfusion recipient with documented HIV infection, Transplant recipient with documented HIV infection) <input type="checkbox"/> Unknown
--	--

Pediatric Check box

Check this box if the client is under 13 years of age.

Client Risk Factors Section

Check all of the boxes that apply to the behaviors that the client engaged in prior to his/her first HIV positive test result. Select all the behaviors that apply, not just those the client suspects exposed them to HIV infection.

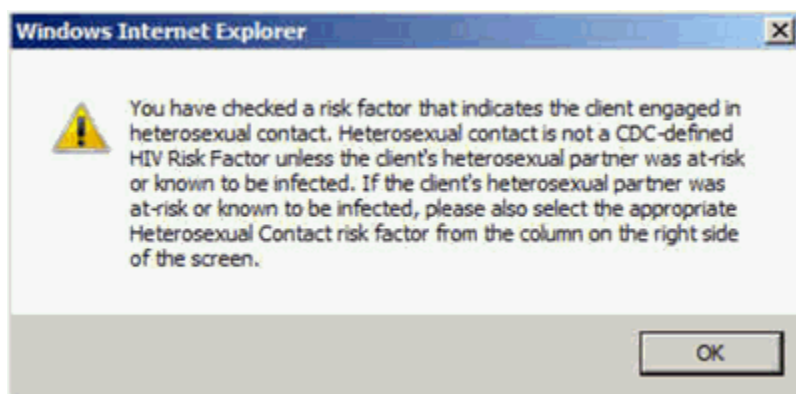
Sex with Male	If the client had sex with men, whether or not their sexual partner was known to be HIV+.
Sex with Female	If the client had sex with women, whether or not their sexual partner was known to be HIV+.
Injected nonprescription drugs	Check this box if the client used drugs delivered by needle. Example: If the client injected heroin or methamphetamine.
Received clotting factor for hemophilia/coagulation disorder	Check this box if the client had or has a coagulation disorder like hemophilia and received clotting factor. HIV can be carried in infected blood products.
Received transfusion of blood/blood components (other than clotting factor),	Check this box if the client has received any such item (excluding clotting factor). HIV can be transmitted in infected blood products, organs, or any bodily fluid, including semen.

transplant of tissue/organs or artificial insemination	
Worked in healthcare or clinical lab setting	Check this box if the client worked in this type of environment. Those who work in laboratories or in healthcare facilities can be at greater risk of HIV exposure.
Mother HIV infected/Perinatal transmission	This check box should only be selected if the client was 13 years of age or younger at the time of exposure. HIV+ mothers can potentially infect their unborn child during pregnancy. If the client's mother was known to be HIV+ while pregnant with the client, select this check box.
Sexual abuse (pediatric only)	This check box should only be selected if the client was 13 years of age or younger at the time of exposure. Check this box if the client was a victim of sexual abuse.
Other	Check this box if the client engaged in other behaviors considered to be a high risk for HIV exposure.
Unknown	Check this box if the client's risk behavior is unavailable.

Sex Partner Risk Factors, Heterosexual Contact Only Section

Check all of the boxes that apply to the client's heterosexual partners before the client's first positive HIV test result. Select all the behaviors that apply, not just those the client suspects exposed them to HIV infection.



Note that Heterosexual Contact is a risk factor only if the client's heterosexual partner was known to be at-risk or infected. Make appropriate entries in the Heterosexual Contact Only column if you are prompted with the following message resulting from an entry in the left-hand column:



Intravenous/injection drug user	Check this box if the client's partner used drugs delivered by needle. Example: If the client injected heroin or methamphetamine.
Bisexual Male	Check this box if the client's sexual partner was a male who engaged in homosexual and heterosexual sex.

Person with AIDS or documented HIV	Check this box if the client's sexual partner had AIDS or had ever tested positive for HIV.
Other (person with hemophilia/coagulation disorder, transfusion recipient with documented HIV infection, Transplant recipient with documented HIV infection)	Check this box if the client's partner had received any blood products, tissue, or organs known to have been infected by HIV.
Unknown	Check this box if the client's partner's HIV risk factors were unavailable.

After completing the screen fields:

	Click this button to save your input and return to the Risk Factors Edit screen.
	Click the Cancel button to return to the Risk Factors Edit screen without saving your input.

6.8 ARIES Outreach Services Demographics

The Client Demographics screens show the client's residential and personal information which contains important contact and assistance details. In addition, having a full demographic overview could avail a client of programs available for specific demographic groups. For data collectors and researchers, aggregate demographics can help enhance the quality and efficiency of services to clients.

Client Alerts

A yellow triangular caution icon next to a client's name signifies that a client alert has been entered.



Client alerts contain important details about dealing with the client - for example, if they have sensitive health problems or behavioral issues.

- Click the yellow caution icon to open an alert box with message details, the name of the person who entered the information, and the date it was recorded.
- You may also hover your mouse over the triangle to view a message about the client. The display will include the name of the user who entered or edited the message and the date of entry. The user's name and the entry date are updated when the alert is entered or updated.

< Back Home Find New Shortcuts Help Logout

DEMO-GRAPHICS CONTACT INFO SERVICES HIV TESTS REFERRALS

Mary L Arroyo

Identifiers

Current Gender: Female
Birth date: 8/1/2005 (9 years old)
ARIES ID: 100006725

Demographics [Edit](#)

AKA: MLA
Sex at Birth: Female
SSN: 558-39-7863
Hispanic: Yes (Mexican/Mexican-American)
Race: 1) White (White (including Caucasian, Middle Eastern, North African))
Marital Status: Divorced
Sexual Orientation:
Education Level:
Veteran: Yes
Primary language:
Secondary language:
Place of Death:
Special needs: Unknown
Notes: f

ACE Records

ACE ID's:

Mary L Arroyo Demographics Edit

AKA

Sex at Birth *

Hispanic *

Race

1 *

2

3

SSN

Marital Status

Sexual Orientation

Primary Language

Secondary Language

Place of Death

Other:

Date of Death

Nat'l Orig/Ethnic.

*

*

Education Level

Veteran

Special Needs

Notes

[Save - Next >](#) [Save - Done](#) [Cancel](#)

6.9 ARIES Outreach Services Contact Information

When you access a client's record, the second screen you will see is the Contact Information screen. This screen contains phone numbers, current and previous addresses, e-mail address, and emergency contact information, as well as the client's contact preferences.

Amy H Bush ⚠

Contact Information [Edit](#)

Phones:
 ☎ 512-698-8779 (Home) -- be confidential; messages OK
 512-311-8046 (Fax) -- do not contact; no messages
abush106@earthlink.net -- do not contact; messages OK

Residence:
 353 N Lamar Blvd
 #96
 Austin, TX 78705
County: Travis
Geog Area/HSDA: 4802-Arlington

Previous Address:
 as of 9/6/1984
 500 Oak Lawn Ave
 Dallas, TX 75219
County: Dallas
Geog Area/HSDA: 4811-Harlingen

Contact by mail: Yes
 Be confidential
 Note: Out of town through 9/2005

Mailing Address:
 353 N Lamar Blvd
 #96
 Austin, TX 78705
County: Travis
Geog Area/HSDA: 4810-El Paso

Emergency:
 Amy de la Fuente
 2009 35th St
 Sacramento, CA 95817
Phone 1: ☎ 415-458-7854
Phone 2: ☎ 415-345-6892
 be confidential; messages OK

[Client ID](#) | [My Link](#)

Client Preferences

It's very important to look at any notes next to the contact phone numbers, including:

- Do not call - Do not use this phone number under any circumstances.
- No messages- If the client or contact is not available, do not leave a message of any kind.
- Be confidential - Do not use the agency name or leave any HIV-related information in a message or on an answering machine.

Contact by Mail

If the client chooses to be contacted by mail, use the mailing address given. "Stay confidential" means that the client wants no reference to the agency on the envelope.

Emergency Contact

If the emergency contact contains the note, "Confidential," this means that the agency should only speak to the individual listed as the contact. "No messages" means that if the emergency contact is not available, do not leave a message of any kind. If you have the proper permissions, you may click the **Edit** button to change any contact information.

Completing the Top Portion of the Screen

Residence

Street 1	Enter the client's current residential street address.
Street 2	Enter any piece of information that does not fit into a street name and number, such as Post Office box, Apartment Number, or rural route number.
City	Enter the city where the client currently resides.
State and Zip	Enter the state and the five-digit zip code where the client currently resides. Use the dropdown to select the state.
County	Use the dropdown to select the county in which the client resides. This is a required field. If you cannot determine the county, select "Unknown" from the dropdown.

Geog Area HSDA	If your state and/or county uses Geographic Areas or Health Service Delivery Areas (HSDAs) to identify where the client resides, select the correct option from the dropdown. Otherwise, leave the field blank.
-----------------------	---

Mailing

Same as Residence checkbox	Check this box if the client's mail is delivered to their residential address. ARIES will automatically populate the mailing address fields with the same information as in the residence address fields.
Street 1	Enter the client's mailing address, if different from their residence address.
Street 2	Enter any piece of information that does not fit into a street name and number, such as a post office box, apartment number, or rural route number.
City	Enter the city where the client's mail will be sent.
State and Zip	Enter the state and the five-digit zip code where the client's mail will be sent. Use the dropdown to select the state.
County	Use the dropdown to select the county in which the client's mailing address is located. This is a required field. If you cannot determine the county, select "Unknown" from the dropdown.
Geog Area HSDA	If your state and/or county uses Geographic Areas or Health Service Delivery Areas (HSDAs) to identify where the client's mailing address is located, select the correct option from the dropdown. Otherwise, leave the field blank.

Previous

Since	Enter the date the client began living at their previous residence. Use the format Month/Day/Year where month and day may be one or two digits and year is four digits, or click the calendar icon to the right of the "Since" field. Use the dropdown lists to select the month and year. Then click the day of the month. The calendar window automatically closes and the "Since" field is completed.
Street 1	Enter the client's current residential street address.
Street 2	Enter any piece of information that does not fit into a street name and number, such as Post Office box, Apartment Number, or rural route number.
City	Enter the city where the client currently previously resided.
State and Zip	Enter the state and the five-digit zip code where the client previously resided. Use the dropdown to select the state.
County	Use the dropdown to select the county in which the client previously resided. This is a required field. If you cannot determine the county, select "Unknown" from the dropdown.
Geog Area HSDA	If your state and/or county uses Geographic Areas or Health Service Delivery Areas (HSDAs) to identify where the client's mailing address is located, select the correct option from the dropdown. Otherwise, leave the field blank.

Emergency Contact

Name	Enter the name of the client's emergency contact.
Street Address and City	In the fields below the "name" field, enter the emergency contact's address and city.
State and Zip Code	Enter the state and the five digit zip code of the client's emergency contact. Use the dropdown box to select the state.
Tel 1	<p>Enter the telephone number of the emergency contact. Include the area code, and use hyphens to separate the numbers.</p> <p>After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345</p>
Tel 2	<p>Enter an alternative telephone number for the emergency contact, if any. After a phone number, you may enter an optional extension of up to 5 digits. Do not type "extension" or "ext." before the extension number. Example: 925-555-1212 12345</p>
Confid	<div data-bbox="342 1253 638 1486" data-label="Image"> </div> <p>From the Confid dropdown, select one of the following:</p> <p>Select "Yes" if the client wants emergency calls to be confidential, i.e., the client does not want your agency's name mentioned in a message or on the contact's answering machine.</p> <p>Select "No" if the client allows your agency's name to be mentioned in</p>




	<p>a message or on the contact's answering machine.</p> <p>Note on Confidentiality:</p> <p>It is possible to leave messages for a client or a client's emergency contact without indicating the nature of the call, i.e., revealing their HIV status, test results, etc. A confidential message might simply say, "Please call your doctor" or "Please call your case manager."</p>
Msgs OK	<p>From the Msgs OK dropdown, select one of the following:</p> <p>Select "Yes" if it is OK to leave messages for the emergency contact.</p> <p>Select "No" if the client does not want any messages left for the emergency contact.</p>

Mail Preferences

May we contact you by mail?	<div data-bbox="396 1022 935 1157" style="border: 1px solid black; padding: 5px;"> <p>May we contact you by mail? Yes <input type="button" value="v"/></p> <p>Should mail be confidential? No <input type="button" value="v"/></p> </div> <p>Use the dropdown to select one of the following:</p> <p>Select "Yes" if the client agrees to receive mail.</p> <p>Select "No" if the client does not agree to receive mail.</p>
Should mail be confidential?	<p>Indicates whether mail is confidential or whether it is OK to mention the agency's name in an email message.</p> <p>1 = Yes if confidential. Do not mention the agency's name.</p> <p>0 = No if not confidential. It is OK to mention the agency's name.</p>
Note field	<p>Enter any piece of information that does not fit into a street name and number, such as a post office box, apartment number, or rural route number.</p>

City	Enter the city where the client's mail will be sent.
State and Zip	Enter the state and the five digit zip code where the client's mail will be sent. Use the dropdown to select the state.
County	Use the dropdown to select the county in which the client's mailing address is located. This is a required field. If you cannot determine the county, select "Unknown" from the dropdown.
Geog Area HSDA	If your state and/or county uses Geographic Areas or Health Service Delivery Areas (HSDAs) to identify where the client's mailing address is located, select the correct option from the dropdown. Otherwise, leave the field blank.

After completing the fields on the screen:

	Click this button to save your input and proceed to the Demographics Edit screen.
	Click this button to save your input and return to the Contact Information screen.
	Click this button to return to the Contact Information screen without saving your input.

6.10 ARIES Services for Outreach Services

ARIES Services Agencies provide clients with services including medical consultations, meals, housing assistance, psychological counseling, transportation, medication, and case management. ARIES manages and tracks these services to help automate budgeting, create reports, and provide quality care for clients.

Staff persons enter new service line items after a client's eligibility for services has been verified and the client has been entered into ARIES. Each service must

be entered as a separate service line item, to track individual services for reporting purposes. Wherever possible, ARIES pre-fills text fields to make data entry quick and simple.

The default unit of service (UOS) for most service categories is "15 minutes." However, some service categories have different units of measurement such as "test" or "visit." To access a client's Services screen click the Services tab next to the Contact Info tab.

You can filter a client's services view by selecting a date or date range, the staff person who provided the services, the program under which services were provided, the primary and secondary service categories, and subservices if any.




Complete the fields as follows:

New	Click this button to record a new service for the client on the Service Edit page.
Date Filters	<p>Click this button to Enter the date you wish to filter by in the first text field using the Month/Day/Year format where month and day can be one or two digits and year is four digits (e.g., for August 2, 2010, enter 8/2/2010). You can also click the calendar icon to use the pop-up calendar.</p>

	<p>Use the dropdown lists to select the month and year you wish to enter. Click the day and date displays in the text field. The pop-up calendar window closes automatically.</p> <p>To filter for records on a given day, select "On" from the dropdown list and enter a specific date, e.g. 8/2/2010, in the first text field. Leave the second text field empty. Select "Before" to sort through all entries before, but not including, that specific date. Enter the date, e.g. 8/2/2010, in the first text field and leave the second text field empty. This will retrieve records dated before midnight on August 2, 2010.</p> <p>Select "After" to bring up all records dated after a specific date, including records dated that day. For example entering 8/2/2010 in the first text field clicking Search will display all the records dated August 2, 2010 and all the days following it. For this option, leave the second text field empty.</p> <p>To filter a range of dates, select "Between" from the dropdown list and enter in the beginning of date in the first text field and the ending date in the second text field. Your viewed results will include all records from 12:00 AM on the first date to 11:59 PM on the second date. For example, entering 8/2/2010 in the first text field and 8/7/2010 in the second text field and clicking Search will display all records on August 2, 2010 through August 7, 2010.</p>
Staff	<p>Use this dropdown list to filter the view of services by the staff person who provided them. If you make no selection, services by all staff members are displayed.</p>
Program	<p>Use this dropdown list to filter the view of services by program. When you select a program, the corresponding primary services populate the Primary dropdown list. If you make no selection, all services are displayed and</p>

	<p>the Primary dropdown list is not populated.</p> <p>Note: A program will not display in the program dropdown list unless a contract exists for that program and the date range of the contract covers the service date you entered.</p>
Primary	<p>Use this dropdown list to filter the view of services by primary service. When you select a primary service, the corresponding primary services populate the Secondary dropdown list.</p> <p>If you make no selection, all primary services for the program selected (if any) are displayed and the Secondary dropdown list is not populated.</p>
Secondary	The secondary service provided to the client.
Subservice	Agency - defined subservice provided to the client.
Date	The date the service was provided.
Staff	The staff person who provided the service.
Category	The type of service the client received, listed by program, primary service, secondary service and, if applicable, agency defined subservice. For example, a dental exam may be listed as "Ryan White > Oral Health Care > Routine Treatment" where "Ryan White" is the program, "Oral Health Care" is the primary service, and "Routine Treatment" is the secondary service.
UOS	Units of service the client received under the associated category, and the cost of each unit of service. For example, a day's worth of meals may be listed as "2 meals @ \$7."
Total	The total cost of the service.

	<p>Click this button to edit the service on a given row on the Services Edit screen.</p>
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6.10.1 Recording or Editing an ARIES Service for Outreach Services

Agencies provide clients with services which may include medical consultations, meals, housing assistance, psychological counseling, transportation, medication, and case management. ARIES manages and tracks these services to help automate budgeting, create reports, and provide quality care for clients. Staff persons (intake personnel, case managers, support services providers, and data entry personnel) enter new service line items after a client's eligibility for services has been verified and the client has been entered into ARIES. Each service must be entered as a separate service line item, to track individual services for reporting purposes. Wherever possible, ARIES pre-fills text fields to make data entry quick and simple.

The default unit of service (UOS) for most service categories is "15 minutes." However, some service categories have different units of measurement such as "test" or "visit." Because the "Other Services" categories are a mixture of diverse services, the units of measurement are varied.


Entering a New Service

Do a Client Search to access the client's Services screen. ARIES looks up all the clients who match all your criteria and then displays them on the Client Search Result screen. If there is only a single result for your search, you will be taken to the Demographics screen.



Date	Staff	Category	UOS	Total	Edit
3/5/2015	Jenny Martin	MAI > Outreach Services > Appointment Assistance > Appointment Assistance	1.00 15 Minutes @ \$0.00	\$0.00	Edit
6/26/2013	Arlene Marlow	CARE/HDP > Health Insurance Premium > Co-Payment > Co-Payment	3.00 Month @ \$60.00	\$180.00	Edit
6/13/2006	Kellie Norcott	Ryan White > AIDS Pharmaceutical Assistance (local) > Medication > Local Drug Reimbursement	10.00 Medication @ \$15.00	\$150.00	Edit

Click the New button in the upper left-hand corner of the screen to bring up the New Service screen. Some information is pre-filled by default but can be changed.


Service 

Client Name Ang, Abby
Client Ang, Abby
Staff Martin, Jenny **Site** Main
Date of Service * 3/14/2006 **Days to Next Service** **date**
Contract Name * Enter a service date that has an active contract **Created Date**
Program Enter a service date that has an active contract
Primary Service * Enter a service date that has an active contract
Secondary Service * Enter a service date that has an active contract
Agency Subservice Enter a service date that has an active contract
Units of Service @ \$ per = \$ **Total**
Client Payment **CARE/HIPP Co-Payment**
Actual Minutes Spent
Service Notes
 Finalize (record will be uneditable after changes are saved)

Cancel




Complete the fields as follows. Fields marked with a red asterisk(*) are required.

Client Name Dropdown	If the client's name is not pre-filled, use the Client Name dropdown to select how you want to identify the client (e.g., the client name -- first plus last name --is the most common identifier, but you can also use an agency-specific client ID or program client ID).
Client Name Text field	If the client's name is not pre-filled, enter the corresponding name or ID in the text field. Note: If you use the client's name, do not enter their middle initial.
Staff	Use the Staff dropdown to select the staff person responsible for the service. Your name is the pre-selected choice, but if you are entering data on behalf of someone else, you must select the name of the person providing the service.
Site	If your agency has multiple sites, use the Site dropdown to select the location where the service was provided.

<p>Date of Service</p>	<p>Enter the date the service was administered. Use the Month/Day/Year format where month and day can be one or two digits and year is four digits. Example: For May25, 2011 you would enter 05/25/2011.</p> <p>You can also use the calendar pop-up by clicking the calendar icon.</p>  <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the date text field. The calendar window automatically closes</p>
<p>Days to Next Service fields</p>	<p>Enter the number of days until the client is scheduled to receive their next service. Example: If the client needs a follow-up visit after three months, enter 90 in the Days to Service field and the date is automatically calculated and entered in the Date field.</p> <p>Similarly, if you enter the date in the Date field (using either the format Month/Day/Year, or the pop-up calendar), the number of days is automatically calculated and entered in the Days to Next Service field.</p> <p>The Days to Next Service can be used as a reminder or to-do item for this client.</p>
<p>Contact Name</p>	<p>Use the dropdown to select the contract name. Your choice determines what will appear in the subsequent Program, Preliminary Service, Secondary Service, and Agency Subservice dropdown lists.</p> <p>Example: Selecting Medicare from the Contract dropdown will list only the services available under that contract in the subsequent service dropdowns.</p> <p>If multiple contracts are listed, use the Contract Name dropdown to select the contract under which the service is to be reimbursed.</p>

<p>Program</p>	<p>Use the dropdown to select the type of program (e.g., Ryan White).</p> <p>Services are organized in four tiers: Program, Primary Service, Secondary Service, and Agency Subservice. The dropdown selection you choose at one tier fills in the available services at lower tiers.</p> <div data-bbox="402 430 1193 703" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Program * <input type="text" value="Ryan White"/></p> <p>Primary Service * <input type="text" value="Rehabilitation Services"/></p> <p>Secondary Service * <input type="text" value="Rehabilitation Services"/></p> <p>Agency Subservice * <input type="text" value="Rehabilitation Services"/></p> </div> <p>Example: If a client is eligible for services under your agency's Medicare contract, select the Medicare contract from the Program dropdown list. As a result of this selection, only the services available under that contract will be displayed in the service dropdown lists.</p> <p>Note: A program will not display in the program dropdown field unless a contract exists for that program and the date range of the contract covers the service date you entered.</p>
<p>Primary Service</p>	<p>Use the dropdown to select the primary service. Your choice determines what will appear in subsequent service dropdown lists.</p> <p>Example: If you select Mental Health Services from the Primary Service dropdown, the Secondary Service dropdown will list only the mental health services your agency provides.</p>
<p>Secondary Service</p>	<p>Use the Secondary Service dropdown to select the secondary service.</p> <p>Choosing a secondary service fills the Agency Subservice dropdown with the specialized subservices your agency offers. Again, only those services specified in the contract setup will be shown.</p> <p>If the service line item is medication, the HRSA Drug Code dropdown list appears in the form. Select the code that corresponds to the client's medication. Each line in the dropdown lists the medication's brand name, generic name, and HRSA drug code.</p>
<p>Agency Subservice</p>	<p>Use the Agency Subservice dropdown to select the agency subservice.</p>

Units of Service	<p>The default values for the Units of Service, Cost, per, and Total text boxes automatically fill in when you enter a service type.</p> <p><u>Changing the costs and unit quantities</u></p> <p>You can change the costs and unit quantities. Example: An intake, which is measured in quarter hour visits, may normally take 3 hours, or 12 units. The units default to 12 when you choose a subservice. However, if you have a particularly lengthy intake that takes four hours, you would replace the "12" with "16" and the total would recalculate in the Total text field.</p> <p><u>Services not calculated by units of service</u></p> <p>For services not calculated by units of service, leave the Cost text field empty and enter the actual cost of the service in the Total text field.</p> <p>Examples:</p> <p>One-way trips might be reimbursed by mileage. The unit of service is one but a one-way trip could be several miles so the Cost text field is left empty and the actual cost of the service is entered in the Total text field.</p> <p>For medication, the unit of service is by prescription. A 100-pill prescription is still one unit of service, so enter the cost of the medication in the Total text field.</p>
@ \$ field	<p>Enter the cost of the service.</p> <p>Note: Some services are not calculated by units of service. Example: One-way trips might be reimbursed by mileage. the unit of service is 1, but a one-way trip could be several miles. In such cases, leave the cost text field empty and enter the actual cost of the service in the Total field.</p>
Per field	<p>From the dropdown list, select the item of service, e.g., meal.</p>
= \$ total field	<p>This field is automatically calculated, except where otherwise indicated. (See above note in the @ \$ field).</p>
Client Payment	<p>In the Client Payment field, enter the actual dollar amount paid by the client (if applicable).</p>
CARE/HIPP Co-Payment	<p>In the CARE/HIPP Co-Payment field, enter the amount of the co-payment paid by CARE/HIPP service.</p>
Actual Minutes Spent	<p>Enter the amount of time used for an appointment in the Actual Minutes Spent text field. Example: If a consultation lasted 35 minutes, even if it was scheduled for an hour, enter 35. This does not affect the reimbursement process, but it is used for internal reports and scheduling.</p>

Services Notes textbox	Use the Service Notes text box to enter any other details pertaining to the service line item, including any additional payment sources.
Finalize	Select the Finalize checkbox to prevent the record from being edited further once you have saved it. Please note that information about a client's substance use and mental health should NOT be entered in the Notes field. Note: Once the box is checked, it can never be edited again.
	Click this button to save your input and return to the client's Services screen.
	Click this button to discard your entries and return to the client's Services screen.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise, and prior consultation with the system administrator is highly recommended. This option is available only to users with the appropriate permission level. Note: You are prompted to confirm the deactivation. Clicking Deactivate does not deactivate the client with ARIES; it only deactivates the record. Once deactivated, the record will no longer be visible. If you do not want to deactivate the record, click Cancel and you will be returned to the Service Edit screen.

6.11 ARIES Outreach Services HIV Test

The HIV Tests screen appears first when you click the HIV Tests tab. This screen contains a longitudinal record of the HIV tests associated with a particular encounter. This table lists the client's HIV testing history including when and where they received testing, the test results, and whether pre- and post-test counseling was offered.

Use the HIV Tests section of the screen to edit existing HIV test information, or to add new test information.

To add new HIV test information, click the **New** button.

To edit existing HIV test information, click the **Edit** button.

Both actions put the HIV Tests screen into Edit mode.

Mary L Arroyo HIV Tests 

HIV Test Date	Result	County	State	Source	Pre-test Counseling	Post-test Counseling	
2/27/2008	Negative				Offered 2/26/2008	Not Offered 2/6/2008	
2/27/2008	Negative				Offered 2/26/2008	Not Offered 2/6/2008	





Mary L Arroyo HIV Tests ⚠

HIV Test Date	Result	County	State	Source	Pre-test Counseling	Post-test Counseling
2/27/2008	Negative				Offered 2/20/2008	Not Offered 2/6/2008
2/27/2008	Negative				Offered 2/20/2008	Not Offered 2/6/2008


6.12 ARIES Outreach Services Referral


Referrals are used to help clients access services that are unavailable at your agency. For example, if your agency specializes in psychosocial counseling, but your client needs medical attention, you can enter a referral to a medically based agency. It is important that referrals be recorded, as your agency may be reimbursed for referrals.

To navigate to the Referrals screen from a client's information screen, click the Care Plan tab from the top tier of tabs. Then, from the second tier of tabs, click the Referrals tab.

Date	Service	Referred to	Target Date	Outcome
10/21/2013	Ryan White > Outpatient/Ambulatory Medical Care > Outpatient/Ambulatory Medical Care	Alternative medicine	11/4/2013	<input type="button" value="Edit"/>

The screen displays a table of the client's referrals to other agencies. Please note that each column heading in the table is sortable. Selecting a column heading will sort the table in ascending or descending order based on the contents of the selected column. Yellow highlight indicates which column is the select sort column.

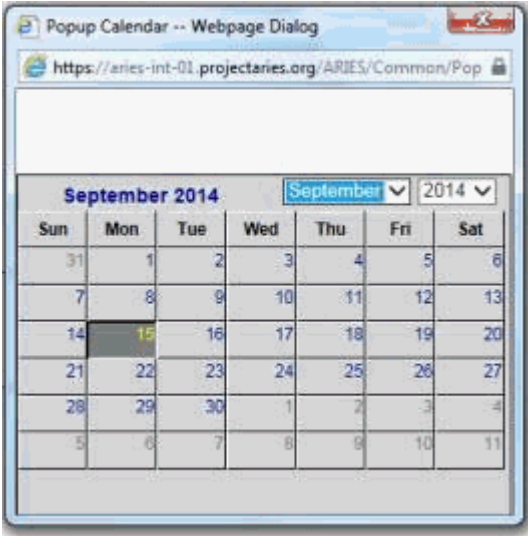
Date	This is the date when the referral was made.
Service	Indicates what type of service the client needed.
Referred To	This is the agency to which the client was referred to.
Target Date	Estimated date when the client was to receive the referred services.
Outcome	This is the outcome of the referral; whether the client attended their appointment with the other agency or not. It does not specify whether the client successfully received services. If the outcome has not been achieved, the Edit button appears.
	To create a new referral, click the New button. This action will display the Referrals screen in Edit mode.

	<p>To edit an existing referral, click the Edit button. This action will display the Referrals screen in Edit mode.</p>
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6.12.1 Edit ARIES Outreach Services Referrals




In the Referrals Edit screen, you can enter and edit information for a client referral to another agency. For example, if your agency handles peer advocacy and a client needs employment assistance, which is handled by another agency, you can create a referral for the client. Referrals are important for management of a client's care plan and for referral reimbursements for your agency.

Complete the Referrals Edit fields as follows:

<p>Referral Date</p>	<p>Enter the date the referral was made. Use the format Month/Day/Year where month and day may be one or two digits and year is four digits. You can also use the pop-up calendar. Click the calendar icon to bring up the calendar.</p> <div style="text-align: center;">  </div> <p>Use the dropdown lists to select the month and year, and then click the specific date to enter it into the text field. The calendar window closes automatically.</p>
<p>Referred by</p>	<p>Select a name from the dropdown, which lists staff for the agency creating the referral.</p>
<p>Program</p>	<p>Use the dropdown to select under which program the needed service would be covered. Example: If the client requires</p>

	<p>housing assistance, you might select "HOPWA" from the program list.</p> <p>The program you choose affects what displays in subsequent dropdown lists. Example: If you select "Ryan White," only services covered by the Ryan White program will display in the Primary Service dropdown list.</p>
Primary Service	<p>Use the dropdown to select the primary service the client needs. What displays in this dropdown list depends on which program was selected. Example: If the client needs a dental cleaning, select "Oral Health Care."</p> <p>If you do not see the service listed, make sure you have selected the proper program.</p> <p>The primary service you select determines what secondary services display in the next dropdown list.</p> <p>Selecting a primary service activates the Secondary Service dropdown.</p>
Secondary Service	<p>As necessary, use the dropdown to select the secondary service the client requires. Example: If the client needs a dental cleaning, select "Oral Health Care" from the Primary Service dropdown list and "Routine Treatment" from the Secondary Service list.</p>
Referral Type	<p>Select the type of agency or service to which the client is being referred. If it is not listed in the dropdown, select "Other."</p>
Referral Type (other)	<p>If you selected "Other" from the Referral Type dropdown list, enter the type of agency in the text field.</p>
Refer to Agency	<p>Use the dropdown to select the agency the client is being referred to.</p> <p>Note: Deactivated agencies do not appear in the dropdown list.</p>
Target Date	<p>Enter the expected appointment date. Use the format Month/Day/Year where month and day can be one to two digits and year is four digits. You can also use the pop-up calendar icon.</p>

<p>Follow-Up Date</p>	<p>If you change information in the referral or enter outcome information, enter the date the follow-up was made. Use the format Month/Day/Year where month and day may be one or two digits and year is four digits. You can also use the pop-up calendar icon.</p>
<p>Reason</p>	<p>In this text box, enter the reason the client was referred to another agency. Example: If there were no available counselors at your agency, and the client was sent to another agency, indicate so here.</p>
<p>Outcome Date</p>	<p>When you perform a follow-up to the referral and you have confirmed its outcome, enter the date in this text field using the format Month/Day/Year where month and day may be one or two digits and year is four digits. You can also use the pop-up calendar icon.</p> <p>This field is editable only with the appropriate permissions.</p> <p>In addition, the following business rules must be met in order for the Outcome, Outcome Date and Notes fields to be editable for Share clients:</p> <p>If client is shared AND User belongs to the 'Referred To' agency AND User has 'Change' permission for 'Referral Outcome' row AND User's agency has enrolled the client AND Referral is also shared (that is, not Mental Health or Substance Abuse, which are NEVER shared) Then allow restricted edit of the three fields, Outcome, Outcome Date and Outcome Notes.</p>
<p>Outcome</p>	<p>When you perform a follow-up to the referral and you have confirmed its outcome, select the result of the referral from the dropdown list.</p> <p>The client either kept the appointment or was a no-show; or the appointment was rescheduled.</p>

	Once an outcome is entered, only users with appropriate permissions can further edit the outcome. See "Outcome Date" for applicable business rules.
Notes	Enter any additional notes regarding the referral in this text box. Once an outcome is entered, only users with appropriate permissions can enter text in the Notes field. See "Outcome Date" for applicable business rules.
	Click this button to save your input and return to the read-only Referral screen.
	Click this button to return to the read-only Referral screen without saving your input.
	Note: The use of Deactivate has a significant impact on the system. It should be used only by those with ARIES expertise. Prior consultation with the system administrator is highly recommended. This option is only available to users with the appropriate permissions. Click this button to deactivate the referral. Once deactivated, the referral will no longer appear on the Care Plan screen. Clicking the Deactivate button does not deactivate the client, only the referral.

Glossary

A

ADAP (AIDS Drug Assistance Program): Administered by States and authorized under Part B of the Ryan White HIV/AIDS Program, provides FDA-approved medications to low-income individuals with HIV disease who have limited or no coverage from private insurance or Medicaid. ADAP funds may also be used to purchase insurance for uninsured Ryan White HIV/AIDS Program clients as long as the insurance costs do not exceed the cost of drugs through ADAP and the drugs available through the insurance program at least match those offered through ADAP.

Adherence: How well a patient follows a doctor prescribed course of medication.

Administrative Agency: An administrative agency manages other agencies and is allowed to report on their client and service data. If your agency has permission to create new agencies, then you are automatically an administrative agency. You automatically administer every agency you create. An ARIES administrator can change or remove the agencies administered by using the ARIES Administration application.

AIDS (Acquired Immunodeficiency Syndrome): A disease caused by the human immunodeficiency virus.

Antiretroviral: A substance that fights against a retrovirus, such as HIV. (See Retrovirus)

ARIES: AIDS Regional Information and Evaluation System.

ARIES Administration: The ARIES Administration application is the administration application for ARIES. With it, you can monitor and control ARIES activity as well as customize ARIES edit screens. You can oversee users and groups, design reports, customize data entry, troubleshoot problems, and perform maintenance.

ARIES ID: An ID created automatically by ARIES for each new client record.

ARIES Import: The ARIES Import application allows you to bring data into ARIES from other sources. ARIES Import accepts XML files, checks them for validity, and then inserts or updates the database with the data.

ARIES Report Export: The ARIES Report Export application allows you to define custom reports. You can also export ARIES data in a variety of formats including XML for inclusion in other applications.

ASP.NET: Active Server Pages, a technology by Microsoft to create robust interactive applications for the Web.

B

Batch (IAS): The Batch function in IAS enables an insurance analyst to create a batch in which each individual record contains the same information, as applicable, and then edit each individual record where needed.

Batch (Lab Batch Data Entry): The Lab Batch Data Entry tab allows for batch entry of CD4 and Viral Load test results in a single ARIES application screen.

C

CADR (CARE Act Data Report): A provider-based report generating aggregate client, provider, and service data for all Ryan White HIV/AIDS Program programs. Reports information on all clients who receive at least one service during the reporting period. Replaces the Annual Administrative Report (AAR) used for Part A and Part B as well as separate Part C and Part D data reports. This report is for 2006 and earlier data reports.

CARE Act (Ryan White Comprehensive AIDS Resources Emergency Act): Federal legislation created to address the unmet health care and service needs of people living with HIV Disease (PLWH) disease and their families. It was enacted in 1990 and reauthorized in 1996 and 2000.

Care Plan: Case managers design care plans outlining the steps needed to meet the client's needs. These steps can include instructions for caregivers, tasks for staff persons, referrals, and services. With care plans, case managers can track a client's progress, which helps ensure quality care.

CARE/HIPP: The Health Insurance Premium Payment (CARE/HIPP) program was created under the CARE Act. Funded by Title II of the Ryan White HIV/AIDS Program and administered by the California Office of AIDS, CARE/HIPP will pay the insurance premium costs for eligible clients with HIV or AIDS.

CD4 Cell Count: The number of T-helper lymphocytes per cubic millimeter of blood. The CD4 count is a good predictor of immunity. As CD4 cell count declines, the risk of developing opportunistic infections increases. The normal adult range for CD4 cell counts is 500 to 1500 per cubic millimeter of blood. (The normal range for infants is considerably higher and slowly declines to adult values by age 6 years.) CD4 counts should be rechecked at least every 6 to 12 months if CD4 counts are greater than 500/mm³. If the count is lower, testing every 3 months is advised. (In children with HIV infection, CD4 values should be checked every 3 months.) A CD4 count of 200 or less is an AIDS-defining condition.

CD4 or CD4+ Cells: Also known as "helper" T-cells, these cells are responsible for coordinating much of the immune response. HIV's preferred targets are cells that have a docking molecule called "cluster designation 4" (CD4) on their surfaces. Cells with this molecule are known as CD4-positive (CD4+) cells. Destruction of CD4+ lymphocytes is the major cause of the immunodeficiency observed in AIDS, and decreasing CD4 levels appear to be the best indicator for developing opportunistic infections.

CDC (Centers for Disease Control and Prevention): Federal agency within HHS that administers disease prevention programs including HIV/AIDS prevention.

Client: Clients are individuals who receive services from your agency. These services can be anything from medical care to housing to counseling to meals. There are clients who are related to or are affected by persons with HIV. Those may include family members, dependents, or roommates, who are eligible for services like housing assistance or transportation.

Client ID: A client identifier assigned internally by the agency with which they are enrolled.

CMP: The Case Management Program provides home- and community-based services for persons with AIDS and symptomatic HIV infection whose cognitive and functional abilities are impaired.

D

Digital Certificate: An electronic identification card, issued by a certificate server, that establishes a user's credentials when doing business or other transactions on the Web.

E

Eligible Metropolitan Area (EMA): Geographic areas highly-impacted by HIV/AIDS that are eligible to receive Part A Ryan White HIV/AIDS Program funds.

Encryption: The process of disguising information in a way such that only the people with the right key can uncover the information.

eURN: Extended Unique Record Number, an expansion of the identity number developed by HRSA and generated in ARIES. The URN is composed of the first and third characters of the client's first and last name, the date of birth and gender. The extended URN (eURN) includes all of the above, plus the client's middle initial and the first and third characters of the client's mother's maiden name.

G

Genotypic Assay: A test that analyzes a sample of the HIV virus from the patient's blood to identify actual mutations in the virus that is associated with resistance to specific drugs.

Grantee: The recipient of Ryan White HIV/AIDS Program funds responsible for administering the award.

H

HAART (Highly Active Antiretroviral Therapy): HIV treatment using multiple antiretroviral drugs to reduce viral load to undetectable levels and maintain/increase CD4 levels.

HIV Disease: Any signs, symptoms, or other adverse health effects due to the human immunodeficiency virus.

Home and Community Based Care: A category of eligible services that States may fund under Part B of the Ryan White HIV/AIDS Program.

HOPWA: The Housing Opportunities for Persons with AIDS Program was established by U.S. Department of Housing and Urban Development (HUD) to address the specific needs of persons living with HIV/AIDS and their families. HOPWA makes grants to local communities, States, and nonprofit organizations for projects that benefit low income persons medically diagnosed with HIV/AIDS and their families.

HRSA (Health Resources and Services Administration): The agency of the U.S. Department of Health and Human Services that administers various primary care programs for the medically underserved, including the Ryan White HIV/AIDS Program.

HTML: Hyper Text Markup Language, the standard language for describing how information is displayed and interacts with users on a web browser.

HTTP: Hypertext transfer protocol. A communication protocol that allows the web browser and web server to exchange data.

HTTPS: A protocol identical to HTTP except it uses the SSL protocol to allow the web browser and the web server to agree to an encryption methodology so that only the two of them can decipher the communication sent to each other over the Internet.

HUD (U.S. Department of Housing and Urban Development): HUD (U.S. Department of Housing and Urban Development) The Federal agency responsible for administering community development, affordable housing, and other programs including Housing Opportunities for People with AIDS (HOPWA).

I

IDU: Injection Drug User.

Insurance Assistance Program: The Insurance Assistance Program pays premiums for two separate insurance programs: HIPD and Medicare Part D. Each program has its specific eligibility criteria and each program requires that applicants submit an application with specific information.

K

Karnofsky Scale: A score between 0 and 100 assigned by a clinician based on observations of a patient's ability to perform common tasks. Thus, 100 signifies normal physical abilities with no evidence of disease. Decreasing numbers indicate a reduced ability to perform activities of daily living.

L

Longitudinal: This refers to data points that have multiple values over a period of time. Longitudinal data for certain data points shall be maintained and displayed in ARIES, until they are moved off the production database. At that point, they may exist only as part of the historical data. Examples of longitudinal data in ARIES are CD4, viral load, HIV tests, and pregnancy. Each client may have zero, one or more records for each other these fields.

M

Maintenance therapy: A preventative therapy that follows successful initial treatment of an illness. Maintenance therapy typically continues for the lifetime of an individual to prevent disease reactivation, also known as secondary prophylaxis.

MCWP: The Medi-Cal Waiver Program provides home- and community-based services for persons with AIDS and symptomatic HIV infection whose cognitive and functional abilities are impaired.

MDR Test: Multi-drug resistance testing. If a client tests positive for tuberculosis, tests can be performed evaluating the drug resistance of the mycobacterium strain.

Median Area Income: The median household annual income of a geographic area as defined by the Department of Housing and Urban Development.

Monthly Adjusted Gross Income: A household's monthly income reduced by deductions (or allowances) for dependents, elderly households, medical expenses, disability assistance expenses, and childcare.

Mycobacterium avium complex (MAC): A bacteria which can infect the lymph system, bone marrow, liver, spleen, spinal fluid, lungs, and gastrointestinal tract causing diarrhea, wasting, fever, fatigue and spleen enlargement.

N

Needs Assessment: A process of collecting information about the needs of PLWH (both those receiving care and those not in care), identifying current resources (Ryan White HIV/AIDS Program and other) available to meet those needs, and determining what gaps in care exist.

P

Part A: The part of the Ryan White HIV/AIDS Program that provides emergency assistance to localities (EMAs) disproportionately affected by the HIV/AIDS epidemic.

Part B: The part of the Ryan White HIV/AIDS Program that provides funds to States and territories for primary health care (including HIV treatments through the AIDS Drug Assistance Program, ADAP) and support services that enhance access to care to PLWH and their families.

Part C: The part of the Ryan White HIV/AIDS Program that supports outpatient primary medical care and early intervention services to PLWH through grants to public and private non-profit organizations. Part C also funds capacity development and planning grants to prepare programs to provide EIS services.

Part D: The part of the Ryan White HIV/AIDS Program that supports coordinated services and access to research for children, youth, and women with HIV disease and their families.

Pediatric Scale: The acuity of the client's symptoms if the client is under 13-years of age. The scale is measured in a letter grade from A-C, where C is the most severe. If the client has no symptoms, they are scored an N.

Permissions: Each ARIES user is assigned permissions that grant them access to different portions of ARIES. Users can view, change, create, and deactivate records in ARIES based on their permissions. ARIES administrators can change these privileges through the Staff Permissions screen. A staff person cannot edit his or her own permissions.

Phenotypic Assay: A procedure whereby sample DNA of a patient's HIV is tested against various antiretroviral drugs to see if the virus is susceptible or resistant to these drug(s).

PLWH: People Living with HIV Disease.

Pneumocystis carinii pneumonia (PCP): A life-threatening type of pneumonia thought to be caused by a fungus.

PPD: The purified protein derivative skin test used to test for tuberculosis.

Primary Service: A broad category of services offered under a program, as defined by the Office of AIDS or by the Health Resources and Services Administration (HRSA). For example, in the HOPWA Program, Housing Subsidy Assistance is a primary service. Primary services are displayed in ARIES Client in the pre-set list on the Services Edit screen.

Program: A group of related services available to persons with specific needs who meet certain eligibility requirements. For example, CARE/HIPP benefits are available for financially needy persons with private insurance. Each program has a separate enrollment process.

Protease: An enzyme that triggers the breakdown of proteins. HIV's protease enzyme breaks apart long strands of viral protein into separate proteins constituting the viral core and the enzymes it contains. HIV protease acts as new virus particles are budding off a cell membrane.

Protease Inhibitor: A drug that binds to and blocks HIV protease from working, thus preventing the production of new functional viral particles.

R

Referral: Referrals are used to help clients access services that are unavailable at an agency. For example, if an agency specializes in psychosocial counseling, but their client needs medical attention, a referral can be made to a medically based agency.

Related/Affected Individual: Clients associated with the client who are HIV negative as well as those with unknown HIV status. An affected client can be a family member or partner but must be linked to an infected client who is receiving services. Affected clients may be eligible for services like housing assistance or transportation.

Relational Database: A type of database in which complex data is separated and stored across multiple tables, tied together by a common key, such as a Client ID. Doing this improves the flexibility of the database and increases its robustness.

Retrovirus: A type of virus that, when not infecting a cell, stores its genetic information on a single-stranded RNA molecule instead of the more usual double-stranded DNA. HIV is an example of a retrovirus. After a retrovirus penetrates a cell, it constructs a DNA version of its genes using a special enzyme, reverse transcriptase. This DNA then becomes part of the cell's genetic material.

Risk Factor or Risk Behavior: Behavior or other factor that places a person at risk for disease; for HIV/AIDS, this includes such factors as male-to-male sexual contact, injection drug use, and commercial sex work.

Ryan White HIV/AIDS Program Annual Data Report (RDR): Replaced the CADR (CARE Act Data Report) beginning with the 2007 report year. A provider-based report generating aggregate client, provider, and service data for all Ryan White HIV/AIDS Program programs. Reports information on all clients who receive at least one service during the reporting period.

S

Salvage Therapy: A treatment effort for people who are not responding to, or cannot tolerate the preferred, recommended treatments for a particular condition. In the context of HIV infection, drug treatments that are used or studied in individuals who have failed one or more HIV drug regimens. In this case, failed refers to the inability to achieve or sustain low viral load levels.

Secondary Service: A category of services falling under a primary service, defined by the Office of AIDS or by the Health Resources and Services Administration (HRSA). For example, in the HOPWA Program, Housing Subsidy Assistance is a primary service, and Short Term Rent, Short Term Mortgage Assistance and Short Term Utility

Assistance are secondary services under that primary service. In ARIES Client, secondary services are displayed under a primary service in the pre-set list on the Services Edit screen.

Service: Agencies provide services for clients. Services can include medical consultations, meals, housing assistance, psychological counseling, transportation, medication, and case management.

Sign and Seal: The sign and seal feature of ARIES allows users with the proper permissions to finalize certain client records, such as case notes, and certain reports, such as the Contract Allocation and YTD Expenditures Report. Signing and sealing makes client records available to other agencies if the client is a share client. To finalize a record, assuming you have the correct permissions, click the Sign and Seal button. You are required to enter your ARIES login password before signing and sealing. Unsealed records, even for share clients, are only available to others in your agency with the proper permissions. Once case notes have been sealed, they cannot be edited or deactivated. There is no expiration on the "Sign and Seal" feature; the record stays in ARIES indefinitely.

SQL: Structured Query Language, a standard language to create and manipulate data in a relational database.

SQL Server: A relational database server developed by Microsoft Corp

SSL: Secured Socket Layer, a protocol that allows client/server applications to communicate in a way designed to prevent eavesdropping, tampering, or message forgery.

STI: Sexually Transmitted Infection.

Subservice: Agency-defined subcategory of a secondary service, optionally created to distinguish among services for tracking and budgetary purposes.

T

TB (tuberculosis): Infectious disease caused by Mycobacterium tuberculosis that typically affects the lungs but may occur in other organs

TMP: The Therapeutic Monitoring Program is a care program in the state of California created to provide vouchers for viral load and resistance testing for certain ADAP participants.

Transmission Category: A grouping of disease exposure and infection routes; in relation to HIV disease, exposure groupings include, for example, men who have sex with men, injection drug use, heterosexual contact, and perinatal transmission.

U

URL: The Uniform Resource Locator is the address of a web page.

URN: Unique Record Number, an identity number developed by HRSA and generated in ARIES. The URN is composed of the first and third characters of the client's first and last name, the date of birth and gender. ARIES also employs an extended URN (eURN) which includes all of the above, plus the client's middle initial and the first and third characters of the client's mother's maiden name.

V

Viral Load: In relation to HIV, the quantity of HIV RNA in the blood. Viral load is used as a predictor of disease progression. Viral load test results are expressed as the number of copies per milliliter of blood plasma.

W

Web Browser: A desktop application, such as Internet Explorer, that processes the data exchanged with a web service, usually resulting in a display of a web page.

Web Server: A server designed to process HTTP requests from a web browser, such as to get a certain web page or image.

Western Blot: A test for detecting the specific antibodies to HIV in a person's blood. It is commonly used to verify positive EIA tests. A Western Blot test is more reliable than the EIA, but it is more difficult and more costly to perform. All positive HIV antibody tests should be confirmed with a Western Blot test.

Wild Type Virus: HIV that has not been exposed to antiviral drugs and therefore has not accumulated mutations conferring drug resistance.

Windows: The operating system developed by Microsoft for stand-alone laptop and desktop computers.

Windows Server: An operating system of Microsoft Corp designed to handle multiple user requests, such as in a web server or a database server.

X

XML: Extensible Markup Language is a cross-platform, software and hardware independent tool for transmitting information.

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