SECTION 400

REGISTER CLIENTS

SECTION 400 INDEX

SECTION 400: REGISTER CLIENTS

401: <u>Introduction</u>

<u>Note:</u> **Effective October 1, 2009, <u>ALL CLIENTS</u> served by ECIAAA funded programs with the exception of Legal Assistance clients must be registered.**

By clicking on the **Register Clients** tab, you will be able to do the following functions:
1.   **Search for Existing Clients**; and/or,
2.   **Register a New Client** tab.

Your initial step should always be to search for existing clients by using the **Search for Existing Clients** and/or **Address Book** function to assure the client is not already in the ClientTracker database. Remember that other ECIAAA service providers may already be serving this client and the client may already be registered in ClientTracker. However, if this is the first time your agency is authorizing the client and you know that the client has been served by another service provider, the client demographic information will not be visible to your agency. Your agency will have to complete the client authorization process (which includes entering in the clients demographic information) before you will be able to see the client's demographic information.

<u>**Re-authorizing Existing Clients**</u> - You can re-authorize existing clients two (2) different ways on ClientTracker.

1.   **Search for Existing Clients** - this function allows you to search for an existing client individually; and/or, *(See **Search for Existing Clients** on page 4 - 2.)*
2.   **Address Book** - this function allows you to search for existing clients en masse rather than search for each client individually. *(See **Section 500 - Address Book**.)*

<u>**Register a New Client**</u> - In order to register/authorize a new client in ClientTracker, you must use the **Register a New Client** function. *(See **Register a New Client** on page 4 - 4.)*

402: <u>Search for Existing Clients</u>

1.   In ClientTracker, goto the **Search for Existing Clients** content box on the ClientTracker **Home** page **or** click on the **Register Clients** tab and go to the **Search for Existing Clients** content box.

2.   Completing as much client information as you can will narrow the search. Use traditional capitalization techniques - capitalize only the first letter of words that require it. It is best to do a broad search as possible (i.e. enter only the client=s first and last name). If you are not sure you spelled the client=s name correctly, you can enter just the first or first few letters of the client=s name and ClientTracker will give you suggestions.

        Search for Existing Clients on the **Home** page will automatically default to show 20 clients per page. If you would like to change how many clients you want to see, indicate the number next to the **Show:** content box.

3.   When you have the client information entered, click on the **Search** button at the bottom of the **Search for Existing Clients** content box.

4.   Once the search is completed, the **Client Search** page will appear and one of the following will happen:

        a.   If there is not a match with the client data you entered, the following statement will read in the **Search Results** content box, **No clients found with search criteria.** If there are no matching records suggested, click on the **Add New Record** button at the bottom of the **Client Search** page and you will be returned to the **Register Clients** page where you will complete the data in the **Register a New Client** content box. *(See **Register a New Client** on page 4 - 3.)*

                                OR

        b. If there is a match with the client data you entered , all possible entries will appear in the **Search Results** content box on the **Client Search** page. If one of the names matches the data you have for the client (SSN if you have it, address, city) click on the green link for that client name. If more than one listing appears for the same client, make sure all the data is identical in each record. If one record is more correct, click on the link to that name. If they all appear identical, choose the one with the most recent update date. ***If there are duplicate client files, please contact Area Agency to Delete/Merge Client Files.***

5.   If you click on the name link for an existing client, you will go to the **Client Information** page. The following information will be displayed on the **Client Information** page: *(See **Section 900 - Client Information** for explanations on each section on the **Client Information** page.)*

Client Record
Client Demographics
Client Meal Routes
Client Meal Types
Nutritional Risk Assessment
ADL Assessment
IADL Assessment
Registered Services

403: <u>Register a New Client</u>

Complete the **Search for Existing Clients** process before registering a new client in ClientTracker. *(See **Search for Existing Clients** on page 4 - 2.)*

1.   In ClientTracker, click on the **Register Clients** tab.

2.   The **Register Clients** page will appear. Enter information about your new client into the **Register a New Client** content box. Use traditional capitalization techniques - capitalize only the first letter of words that require it.

         Please note the client information that is <u>required</u> in order to register a client in ClientTracker:

         a.   **First and Last Name**

         b.   **County/City/Zip** (if the County/City/Zip is not listed, please contact the Area Agency)

         c.   **Gender**: Female, Male, and Unknown

         d.   **Ethnicity:**   Hispanic or Latino
                                        Not Hispanic or Latino

         e.   **Race:**   White – Non-Hispanic
                                        White – Hispanic
                                        American Indian or Alaska Native
                                        Asian
                                        Black – Non-Hispanic
                                        Black – Hispanic
                                        Native Hawaiian or other Pacific Islander

         f.   **Lives Alone**: Yes, No, and Unknown

         g.   **Limited English Speaking**: Yes, No, and Unknown

      h.   **Status**: Active, Deceased, and Moved

      i.   **Eligibility**: Age
                          Disabled
                          Other
                          Spouse
                          Unknown
                          Volunteer

      j.   **Low Income**: Yes, No, and Unknown

      k.   **Rural (<2500 residents)**: Yes, No, and Unknown

      l.   **Caregiver Advisory Services Only**; Caregiver Relationship

3.   Once you have completed entering the data, click on the **Save and Continue** button at the bottom of the **Register a New Client** content box.

4.   The **Register Client Services** page will appear.

5.   Change the **Registration Date:** to the date within the current quarter the client first received service (dates in prior quarters can not be entered). If a client should have been authorized for a previous quarter, authorize the client during the current quarter. (Please note that the authorization date defaults to the date you are in ClientTracker. Unless this is the same date the client received services, you will need to change the authorization date.)

6.   Change the **Authorization Date:** to the date within the current quarter the client first received service (dates in prior quarters can not be entered). If a client should have been registered for a previous quarter, register the client during the current quarter. (Please note that the registration date defaults to the date you are in ClientTracker. Unless this is the same date the client received services, you will need to change the registration date.)

7.   On the left side of the content box, the services your agency offers will be listed under **Service Offering:** Click in the box next to the service(s) you want to register/authorize the client for.

8.   On the right side of the content box, there is a listing of **Required Assessments**: There will be a checkmark indicating which services require one of the following assessments:

      ADL – CCC Gap Filling, Home Delivered Meals, Home Health, and Respite (all services).

IADL – CCC Gap Filling, Home Delivered Meals, Home Health, and Respite (all services).

Nutrition Risk (a.k.a. **Nutritional Health Assessment)** – CCC Gap Filling, Congregate Meals, and Home Delivered Meals.

9.   Once you have registered/authorized services for the client, click on the **Save** button at the bottom of the **Register Client Services** page.

10.   When you register a client for CCC Gap Filling, Congregate Meals, Home Delivered Meals, Home Health and/or Respite Services, ClientTracker will automatically take you through the required assessments:

    ADL
    IADL
    Nutrition Risk (a.k.a. **Nutritional Health Assessment)**

    (Remember to always click the Save button once you have completed each assessment.)

11.   Once you have registered/authorized the client and completed the required assessments, if applicable, the **Client Information** page will automatically appear. This is a good time to review the client data to insure information was data entered correctly. The following information will be displayed on the **Client Information** page: *(See **Section 900 - Client Information** for explanations on each section on the **Client Information** page.)*

    Client Record
    Client Demographics
    Client Meal Routes
    Client Meal Types
    Nutritional Risk Assessment
    ADL Assessment
    IADL Assessment
    Registered Services