SECTION 600

ENTER UNITS/BULK DATA

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SECTION 600: ENTER UNITS/BULK DATA

601: Introduction

By clicking on the **Enter Units/Bulk Data** tab, you will be able to do the following functions:

1.   **Unit Entry Options**; and/or,
2.   **Client/Unit Bulk Data**.

602: Unit Entry Options - If the service provider is using ClientTracker as their primary ECIAAA program reporting database, units of service **must be reported per client** for the following services:

1.   **Senior Information Services**
2.   **Transportation**
3.   **Assisted Transportation**
4.   **MPSC Operations**
5.   **Medication Management**
6.   **Congregate Meals**
7.   **Home Delivered Meals**
8.   **Caregiver Advisor Services**
9.   **Counseling**;
10.   **Home Health**;
11.   **Individual Needs Assessment**;
12.   **Money Management**;
13.   **Respite**;
14.   **Gap Filling (regular, caregiver & CCC)**
15.   **SHAP services; counseling, outreach, SSLIS, Medicare Savings Programs, Medicare Part D, CB/IL Cares Rx.**

Therefore, the service provider cannot use the "Unit Bulk Data" for these services.

If the service provider is using their own internal reporting database, information must be transferred to ClientTracker through the FTP process. *(See **Section 1400 - Upload/Download WebFTP**.)*

1.   In ClientTracker, click on the **Enter Units/Bulk Data** tab

2.   The **Enter Units by Person** page will appear. In the **Unit Entry Options** dialogue box, choose the parameters (**Site, Service** and **Month Performed**).   This search automatically defaults to show 20 clients per page. If you would like to change the number of clients you want to see, use the drop down menu next to the **Show__ clients per page** content box.   6-1

3.   Click on the **Go!** button.

4.   Below the **Unit Entry Options** dialogue box, will appear the listing of the clients whose last name starts with an (A). Please remember that you can only enter units for clients that are already registered for that service.

5.   Enter the number of units for that Site/Service/Month in the **Hours** content box next to the appropriate client name.

6.   Once you have entered your data for that page, click **Save** button.

7.   At the bottom of the **Enter Units by Persons** page, the report will tell you what page you are on and the **Total Records Found** for that search. To view additional pages, type the page number you wish to review in the box next to **Go To Page:**. Or you can click on the ¦ button in order to view additional pages. Click on the „ button to go to the last page of the report and click on the ƒ button to go to the first page of the report.

8.   To continue entering service units for specific clients for that service, click on the alphabet link matching the first letter of the client's last name below the **Unit Entry Options** dialogue box.

9.   To change the service, repeat steps 2 and 3.

      If there is a blue or red * next to a client's name, they mean the following:

      (Note: * users required assessment in 2 month grace period.) – This blue * indicates that the required assessments for the client has not been completed. ClientTracker will give service providers 2 month grace period to complete those required assessments.

      (Note: * disabled due to a missing or outdated required assessment.) – This red * indicates that the required assessments for the client was not completed within the 2 month grace period. Therefore, ClientTracker will not allow you to enter service units for that particular client until the required assessments have been completed. In order to complete the required assessments, click on the client name link and you will be taken to the **Client Information** page. *(For further instructions on completing the three (3) assessments, see **Section 900 – Client Information**.)*

603. Client Bulk Data – This function allows you to enter client demographic data in bulk. Service providers may use this function when reporting client demographics for the following services:

1. **SHAP**
    SHAP Information & Assistance
    Community Events
    Education & Training Session

2. **Legal Services**;
    Legal Assistance
    Caregiver Legal Fund
    GRG Legal Fund

3. **Corrections to all service units imported through the FTP process**.

If the service provider is using their own internal reporting database, those service providers must transfer that information to ClientTracker through the FTP process. *(See **Section 1400 – Upload/Download WebFTP**.)*

604: Enter Unit Bulk Data

This function allows you to enter service units in bulk. The following service units may be reported in bulk:

1. **Senior Health Assistance Program (SHAP)**
    SHAP Information & Assistance (S12)
    Community Events (S16)
    Education & Training Sessions (S19)
2. **Legal Services**;
    Legal Assistance
    Caregiver Legal Fund
    GRG Legal Fund

Corrections to all service units imported through the FTP process.

If the service provider is using their own internal reporting database, report information must be transferred to ClientTracker through the FTP process. *(See Section 1400 − Upload/Download WebFTP.)*

How to Enter Unit Bulk Data:

1. In ClientTracker, click on the **Enter Units/Bulk Data** tab.

2. The **Enter Units by Person** page will appear.

3. In the **Unit Entry Options** dialogue box, click on the green link **Client/Unit Bulk Data**.

4. The **Enter Bulk Data** page will appear. In the **Bulk Data Entry Options** dialogue box, choose the parameters (**Month Performed, Site,** and **Service**).

   $ **Month Performed**: enter data for each month in that quarter.

   $ **Site**: enter monthly data per site/county.

   $ **Service**: enter monthly data per service.

5. Click on the **Go!** Button.

6. Below the **Bulk Data Entry Options** dialogue box, the **Enter Bulk Clients Demographics Below** and/or the **Enter Bulk Units Below** dialogue boxes will appear.

Enter Bulk Clients Demographics Below

1. In order to complete this section, please refer to the following service instructions on entering **Bulk Client Demographics**:

   SHAP: *See Section 1000 − SHAP*
              SHAP Information & Assistance
              Community Events
              Education & Training Sessions
   Legal Services; *(See Section 1200 − Legal Services.)*
              Legal Assistance
              Caregiver Legal Fund
              GRG Legal Fund

* **Please note**: If service providers report under the **Client/Unit Bulk Data** function instead of authorizing clients, the clients and their demographic information will not be counted toward the service provider's YTD totals with the exception of legal assistance clients.

Enter Bulk Units Below

1.   The following services may enter the total number of service units for that particular month/site: *(Remember to only enter the total number of new service units during that particular month. Do not use YTD data.)*

SHAP: See Section 1000 – SHAP
          SHAP Information & Assistance (S12)
          Community Events (S16)
          Education & Training Sessions (S19)
Legal Services; *(See Section 1200 - Legal Services.)*
          Legal Assistance;
          Caregiver Legal Fund;
          GRG Legal Fund

Corrections to all service units imported through the FTP process. (S*ee* **Section 1300 - Upload/Download WebFTP**.)

Documentation supporting the data entered needs to be maintained at your agency.

2.   When service units have been entered, click on the **Save Bulk Units** button.

3.   When the bulk data has been saved, the following statement will appear, **Bulk Data Save Completed Successfully!**