SECTION 900

CLIENT INFORMATION

SECTION 900 INDEX

SECTION 900: CLIENT INFORMATION

901: Introduction

The following information will be shown on the **Client Information** page for an existing client or when a new client has been registered

1. Client Record
2. Client Demographics
3. Client Meal Routes
4. Client Meal Types
5. Nutritional Risk Assessment
6. ADL Assessment
7. IADL Assessment
8. Registered Services

902: Client Record

In this content box, the following client information will be displayed in the **Client Record** dialogue box:

Name	Social Security Number	Address1
Phone	City	State
Zip Code	County	

902.1: Edit Client Record

You can use this function to revise an existing client's ClientTracker information.

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Client Record** content box, click on the **Edit Client Record** link.

3. The **Edit Client Record** page will appear. In the **Edit the Client's Record** dialogue box, you will be able to edit the following client information:

First Name	Last Name	Middle Name/Initial
Common Name	Social Security Number	Phone Number
Address 1	Address 2	County/City/Zip
Email		

Please note: if you get a message that you are not authorized to edit the client record, please contact the Area Agency.

4. Once you have made your revisions, click on the **Save** button. You will receive a statement **AClient Record Updated Successfully@** in the **Edit the Client's Record** dialogue box

5. To return back to the **Client Information** page, click on **Return to Client Information Page** at the bottom of the **Edit Client Record** page.

903: Client Demographics

In this content box, the following client information will be displayed in the **Client Demographics** dialogue box if the demographic information has been entered by your agency:

Date of Birth	Over 60	Ethnicity/Race
Gender	Status	Lives Alone
Economic Need	Limited English Speaking	Rural (< 2500)
IDoA Rural		

903.1: Edit Demographics

You can use this function to revise an existing client's ClientTracker demographic information.

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Client Demographics** content box, click on the **Edit Demographics** link.

3. The **Edit Client Demographics** page will appear. In the **Edit Aclient name@ Demographics** dialogue box, you will be able to edit the following client demographic information:

Township	Date of Birth	Gender*
Ethnicity/Race*	Lives Alone*	Limited English Speaking*
Status*	Eligibility*	Over 60
Low Income*	Rural (<2500 residents)*	CCP Client
Doctor's First Name	Doctor's Last Name	Doctor's Phone Number

Emergency Contact's First Name, Last Name, Phone Number

**** Denotes a required field.***

4. Once you have made your revisions, click on the **Save** button. You will receive a statement '**Client Demographics Updated Successfully'** in the **Edit client name@ Demographics** dialogue box.

5. To return to the **Client Information** page, click on **Return to Client Information Page** at the bottom of the **Edit Client Demographics** page.

903.2: Add Demographics

If there is no client demographic information shown for an existing client, then client demographic information has not been entered into ClientTracker by your agency and you must enter client demographic information.

1. Go to the **Client Information** page for the existing client you are wanting to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Client Demographics** content box, click on the **Add Demographics** link.

9. The **Edit Client Demographics** page will appear. In the **Add Demographics for Aclient name@** dialogue box, you will be able to edit the following client demographic information:

Township	Date of Birth	Gender*
Ethnicity/Race*	ives Alone*	Limited English Speaking*
Status*	Eligibility*	Over 60
Low Income*	Rural (<2500 residents)*	CCP Client
Doctor's First Name	Doctor's Last Name	Doctor's Phone Number

Emergency Contact's First Name, Last Name, Phone Number

**** Denotes a required field.***

4. Once you have entered demographic information, click on the **Save** button. You will receive a statement **Aclient Demographics Updated Successfully@** in the **Edit Aclients name@ Demographics** dialogue box.

5. To return to the **Client Information** page, click on **Return to Client Information Page** at the bottom of the **Edit Client Demographics** page.

904: Client Meal Routes

This function is optional for nutrition providers only. If your agency has not entered meal routes in ClientTracker, you will not be able to use this function. *(See **Meal Routes** in **Section 800**.)* If your agency has entered meal routes in ClientTracker, the following information will be displayed in the **Client Meal Routes** dialogue box:

Site Meal Route Code

904.1: Edit Meal Routes

This function allows you to revise an existing client's meal route information.

1. Go to the **Client Information** page for the existing client you are wanting to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Client Meal Routes** content box, click on the **Edit Meal Route** link.

3. The **Available Meal Routes** window will appear. This will show all the meal routes registered for your agency.

4. Click in the box next to the meal route you wish to select.

5. Once you have made your selection, click on the **Save** button and the following statement will appear in the **Available Meal Routes** window, A**meal Routes Edited**.@

6. In order to return to the **Client Information** page, click on the **Close Window** link at the bottom of the **Available Meal Routes** window.

904.2: Add Meal Routes

This function allows you to add to an existing client's ClientTracker meal route information.

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Client Meal Routes** content box, click on the **Add Meal Route** link.

3. The **Available Meal Routes** window will appear. This will show all the meal routes registered for your agency.

4. Click in the box next to the meal route you wish to select.
5. Once you have made your selection, click on the **Save** button and the following statement will appear in the **Available Meal Routes** window, A**Meal Routes Edited**.@

6. In order to return to the **Client Information** page, click on the **Close Window** link at the bottom of the **Available Meal Routes** window.

904.3: Delete Meal Routes

This function allows you to delete meal route information for existing clients.

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Client Meal Routes** content box, click on the **Edit Meal Route** link.

3. The **Available Meal Routes** window will appear. This will show all he meal routes registered for your agency and the selected meal routes for the client.

4. Click in the box next to the meal route you wish to delete from the client's information.

5. Once you have made your selection, click on the **Save** button and the following statement will appear in the **Available Meal Routes** window, A**Meal Routes Edited**.@

6. In order to return to the **Client Information** page, click on the **Close Window** link at the bottom of the **Available Meal Routes** window.

905: Client Meal Types

This section should be completed by all nutrition providers, if the client has a special diet requirement.

905.1: Edit Meal Types

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Client Meal Types** content box, click on the **Edit Meal Types** link.

3. The **Available Meal Types** window will appear. You can choose from the following special diets:

Diabetic	Low Fat	Low Sodium
Soft	Other	

4. Select all the special diets that apply to this client by clicking in the square next to the appropriate diet(s).

5. Click the **Save** button when you are done. You will return to the **Client Information** page.

905.2: Add Meal Types

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Client Meal Types** content box, click on the **Add Meal Types** link.

3. The **Available Meal Types** window will appear. You can choose from the following special diets:

Diabetic	Low Fat	Low Sodium
Soft	Other	

4. Select all the special diets that apply to this client by clicking in the square next to the appropriate diet(s).

5. Click the **Save** button when you are done. You will return to the **Client Information** page.

906: Nutritional Risk Assessment

This section must be completed by Case Management, Congregate Meal, and Home Delivered Meal providers. However, if you haven't already registered the client for CCC Gap Filling, Congregate Meal, and Home Delivered Meal for that Fiscal Year, complete the **Registered Services** section first. *(See **Registered Services** on page 9 – 14)* Once you register the client for the above services, ClientTracker will automatically require you to complete a **Nutrition Risk Assessment** for that client.

906.1: Update Nutrition Assessment

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Nutritional Risk Assessment** content box, the most recent assessment information (Assessment Entry Date, Assessment Last Updated, and Overall Score) will appear. In order to update the most recent assessment, click on the **Update Nutrition Assessment** link.

3. The most recent **Nutritional Health Assessment** page will appear. Make necessary revisions by clicking in the circle below **Yes**, **No**, or **Unknown** next to each question.

4. Once you have made your revisions, click on the **Save** button.

5. You are now back at the **Client Information** page. In the **Nutrition Risk Assessment** content box, the **Assessment Last Update** should be the date you entered revisions to the assessment.

906.2: Add Nutrition Assessment

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Nutritional Risk Assessment** content box, click on the **Add Nutrition Assessment** link.

3. The **Nutritional Health Assessment** page will appear. In the **New Nutrition Assessment Needed** dialogue box, answer each question by clicking in the circle below **Yes**, **No**, or **Unknown**.

4. Once you have answered all of the questions, click the **Save** button.

5. You are now back at the **Client Information** page. In the **Nutritional**

   Risk Assessment content box, the new **Assessment Entry Date**, **Assessment Last Update**, and **Overall Score** should be displayed.

906.3: View Previous Assessments

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Nutritional Risk Assessment** content box, click on the **View Previous Assessments** link.

3. The **Nutrition Risk Assessments** window will appear listing all of the previous assessments **Entry Date**, **Last Updated**, and **Overall Score**.

9. To return to the **Client Information** page, click on **Close Window** at the bottom of the **Nutrition Risk Assessments** window.

907: ADL Assessment

This section must be completed by CCC Gap Filling, Home Delivered Meal, and Home Health providers and for all Respite authorized services. However, if you haven't already registered the client for CCC Gap Filling, Home Delivered Meal, Home Health and all Respite services for that Fiscal Year, complete the **Registered Services** section first. *(See **Registered Services** on page 9 – 14)* Once you register the client for the above services, ClientTracker will automatically require you to complete an **ADL Assessment** for that client.

907.1: Update ADL Assessment

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

9. In the **ADL Assessment** content box, the most recent assessment information (Assessment Entry Date, Assessment Last Updated, and Overall Score) will appear. In order to update the most recent assessment, click on the **Update ADL Assessment** link.

3. The most recent **ADL Assessment** page will appear. Make necessary revisions by clicking in the circle below **Yes**, **No**, or **Unknown** next to each question.

4. Once you have made your revisions, click on the **Save** button.

5. You are now back at the **Client Information** page. In the **ADL Assessment** content box, the **Assessment Last Update** should be the date you revisions to the assessment.

907.2: Add ADL Assessment

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **ADL Assessment** content box, click on the **Add ADL Assessment** link.

3. The **ADL Assessment** page will appear. In the **New ADL Assessment Needed** dialogue box, answer each question by clicking in the circle below **Yes**, **No**, or **Unknown**.

4. Once you have answered all of the questions, click the **Save** button.

5. You are now back at the **Client Information** page. In the **ADL**

   Assessment content box, the new **Assessment Entry Date**, **Assessment Last Update**, and **Overall Score** should be displayed.

907.3: View Previous Assessments

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **ADL Assessment** content box, click on the **View Previous Assessments** link.

3. The **ADL Assessments** window will appear listing all of the previous assessments **Entry Date**, **Last Updated**, and **Overall Score**.

4. To return to the **Client Information** page, click on **Close Window** at the bottom of the **ADL Assessments** window.

908: IADL Assessment

This section must be completed by CCC Gap Filling, Home Delivered Meal, and Home Health providers and for all Respite authorized services. However, if you haven't already registered the client for CCC Gap Filling, Home Delivered Meal, Home Health and all Respite services for that Fiscal Year, complete the **Registered Services** section first. *(See **Registered Services** on page 9 - 14)* Once you register the client for the above services, ClientTracker will automatically require you to complete an **IADL Assessment** for that client.

908.1: Update IADL Assessment

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **IADL Assessment** content box, the most recent assessment information (Assessment Entry Date, Assessment Last Updated, and Overall Score) will appear. In order to update the most recent assessment, click on the **Update IADL Assessment** link.

3. The most recent **IADL Assessment** page will appear. Make necessary revisions by clicking in the circle below **Yes**, **No**, or **Unknown** next to each question.

4. Once you have made your revisions, click on the **Save** button.

5. You are now back at the **Client Information** page. In the **IADL Assessment** content box, the **Assessment Last Update** should be the date you revisions to the assessment.

908.2: Add IADL Assessment

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **IADL Assessment** content box, click on the **Add IADL Assessment** link.

3. The **IADL Assessment** page will appear. In the **New IADL Assessment Needed** dialogue box, answer each question by clicking in the circle below **Yes**, **No**, or **Unknown**.

4. Once you have answered all of the questions, click the **Save** button.

5. You are now back at the **Client Information** page. In the **IADL**

   Assessment content box, the new **Assessment Entry Date**, **Assessment Last Update**, and **Overall Score** should be displayed.

908.3: View Previous Assessments

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **IADL Assessment** content box, click on the **View Previous Assessments** link.

3. The **IADL Assessments** window will appear listing all of the previous assessments **Entry Date**, **Last Updated**, and **Overall Score**.

4. To return to the **Client Information** page, click on **Close Window** at the bottom of the **IADL Assessments** window.

909: Registered Services

Completion of the **Registered Services** content box is required in order to register the client for all services received by a particular provider and/or site. Services received by the client must be authorized once per fiscal year.

909.1: Registered Services

1. Go to the **Client Information** page for the existing client you want to review. *(See **Section 400 - Search for Existing Clients**.)*

2. In the **Registered Services** content box, click on the **Register Services** link.

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

4. Change the **Registration Date**: to the date within the current quarter the client first received service (dates in prior quarters can not be entered). *(**Registration Date** will only appear if this is a new client.)* 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.)

5. 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 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. 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.

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

   ADL - Case Management, Home Delivered Meals, Home Health, and Respite (all services).

   IADL - Case Management, Home Delivered Meals, Home Health, and Respite (all services).

   Nutrition Risk (a.k.a. **Nutritional Health Assessment)** - Case Management, Congregate Meals, and Home Delivered Meals.

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

9. 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.)

10. You will be returned to the **Client Information** page. In the **Registered Service** content box, the following information will be displayed:

    Service Offerings   Active: (Date)   Re-authorize Services

909.2: Enter Units

If the service provider is using ClientTracker as their primary ECIAAA program reporting database, the following services must enter service units by person :

Counseling	Home Health
Individual Needs Assessment	Money Management
Gap Filling (Regular, Caregiver & CCC)	
SHAP – Counseling, Outreach, SS LIS, Medicare Part D & CB/IL Cares Rx	

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Registered Services** content box, click on **Enter Units** link in the upper right hand corner.

3. **Enter Units** window will appear. In the **Unit Entry Options** dialogue box, choose a **Site**, **Service** and **Month Performed**.

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

5. Below the **Unit Entry Options** dialogue box will be another dialogue box with the client's name. In the box below **Hours**, put the number of service units for that client, for that service and for that month.
6. Click on the **Save** button.

7. In the **Unit Entry Options** dialogue box, the following statement will appear, **ΑData Saved Successfully@**.

8. If you are done entering units of service for this client and wish to return to the client's **Client Information** page, click on the **Close Window** link at the bottom of the **Enter Units** window.

   OR

   If you have additional units of service for the client, repeat steps 3 through 6.

A. Unit of Service Corrections

Corrections can only be made during the current quarter. If corrections need to be made, repeat steps 3 through 6.

909.3: Re-authorize Services

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Registered Services** content box, click on the **Re-authorize Services** link next to the service you wish to re-authorize.

3. The **Re-authorize Services** window will appear. Select the **Date/Month/Year** for the re-authorization.

4. Click in the box next to the service you wish to re-authorize.

5. Click on the **Save** button.

6. In the **Re-authorize Services** window the following statement will appear, **Aservices Edited Successfully.@**

7. Click on the **Close Window** button at the bottom of the **Re-authorize Services** window.

8. When you re-authorize a client for Case Management, Congregate Meals, Home Delivered Meals, Home Health and/or Respite Services, ClientTracker will automatically take you through the required assessments (**ADL, IADL, and Nutrition Risk Assessment**).

9. Once you have completed all required assessments, you will be returned to the **Client Information** page. In the **Registered Service** content box, the service you re-authorized will be displayed along with the active date. You will also find an **Un-authorize Services** link next to the service you re-authorized.

909.4: Un-authorize Services

1. Go to the **Client Information** page for the existing client you want to review. *(See **Search for Existing Clients** in **Section 400**.)*

2. In the **Registered Services** content box, click on the **Un-authorize Services** link next to the service you wish to un-authorize.

3. The **Un-authorize Services** window will appear. Select the **Date/Month/Year** for the un-authorization.

4. Click in the box next to the service you wish to un-authorize.

5. Click on the **Save** button.

6. In the **Un-authorize Services** window the following statement will appear, **Aservices Edited Successfully.@**

7. In order to return to the **Client Information** page, click on the **Close Window** button at the bottom of the **Un-authorize Services** window.

8. In the **Registered Service** content box, the service you un-authorized will be displayed along with the active date. You will also find an **Authorize Services** link next to the service you just un-authorized.

909.5: Authorize Services

1. Go to the **Client Information** page for the existing client you want to review. *(See* ***Search for Existing Clients*** *in* ***Section 400****.)*

2. In the **Registered Services** content box, click on the **Authorize Services** link next to the service you wish to authorize.

3. The **Authorize Services** window will appear. Select the **Date/Month/Year** for the authorization.

4. Click in the box next to the service you wish to authorize.

5. Click on the **Save** button.

6. In the **Authorize Services** window the following statement will appear, **Aservices Edited Successfully.@**

7. Click on the **Close Window** button at the bottom of the **Authorize Services** window.

8. When you authorize a client for Case Management, Congregate Meals, Home Delivered Meals, Home Health and/or Respite Services, ClientTracker will automatically take you through the required assessments (**ADL**, **IADL**, and **Nutrition Risk Assessment**).

9. Once you have completed all required assessments, you will be returned to the **Client Information** page. In the **Registered Service** content box, the service you authorized will be displayed along with the active date. You will also find an **Un-authorize Services** link next to the service you just authorized.