ARCHITIER

ARIES Hands-on Exercises

1. Introductions, Overview, and Getting Started (Help Manual Section 1)

Applications: ARIES, ARIESReportExport, ARIESImport, ARIESAdmin

Primary Entities: Clients, Staff, Agencies, Appointments

Web Application: Browser, Web Server, ARIES Server, Databases

Security and encryption of communication between browser and middle tier

A. Client Certificates with Microsoft Certificate Server.

1) Log into Windows, open Internet Explorer, and navigate to http://CertificateServerMachine/certsrv.
2) Select Request a certificate and Next
3) Select Web Browser Certificate for User certificate request and Next
4) In the identifying Information screen: Complete the Email, Company, Department, City, State and Country/Region as appropriate.
5) In the Name field, you will encode some info that will be used to validate a login: Type in your ARIES login followed by space and "ARIESClient" e.g. "JohnSmith ARIESClient" The login must have at least 8 characters.
6) Press Submit and Yes to the prompt to send the request to the certificate server.
7) When the certificate request has been reviewed and issued, go back to the same website and select "Check on a pending certificate" and press Next.
8) Select the desired certificate in the list box and press Next.
9) If the certificate was approved, you will be shown a link to install the certificate. Click on the link to install the certificate.

B. Browser Settings.

1) Start Internet Explorer and choose the Tools→Internet Options… menu item.
2) Go to the Security Tab and check the level.
3) In the Custom Level dialog turn scripting on and off under the section: Scripting→Active Scripting
4) In the Privacy tab you can enable and disable cookies.
5) Navigate to https://*AriesServer*/ARIES.
6) Try logging in with your login and password.
7) If you have disabled either cookies or JavaScript you should get an error message.
8) Enable cookies and JavaScript and make sure you can log into ARIES.

10)

C. Menus, Tab Strips, and Keyboard Shortcuts

1505 Black Mountain Road, Burlingame, California 94010-7103 650-343-7940 650-343-7950 fax

2. Agencies and Sites

A. Editing an Agency.

1) Login to ARIES as your agency administrator.
2) Choose the Find→Agency menu item and press Search to find all agencies.
3) Click on the link to your agency in the search results.
4) Choose the Edit button to edit your agency details and sites.
5) Press F1 to get help on the data entry fields for this screen. The fields with asterisks are required before you can save the form.
6) In the Help window, navigate to sections 5.1.1 and 5.1.2 for step by step help on the agency and site screens.
7) Enter the agency data and press Save + Next
8) In the Agency Sites screen, press the New button and enter at least one site for the agency. Press Done when you have entered the sites.

3. Staff, Roles, and Permissions

A. Adding Staff for an Agency

1) Login to ARIES as the agency administrator
2) Choose the New→Staff menu item and search the existing staff to make sure the staff person has not been entered yet.
3) If the staff person is present, have them read and sign a staff confidentiality statement, something like the Reggie example.
4) Click the New Staff button at the bottom of the search results and then fill in the details for a staff person. Press F1 to see specific help for this screen. Within the help go to 4.1.3 for step by step help on creating staff people.
5) Create staff logins for case managers, medical staff (if the agency provides medical services), volunteers and/or other roles as appropriate. Remember the passwords!

B. Resetting a Password

1) Login to ARIES as either the administrative agency or agency administrator.
2) Use the Find→Staff menu item to get to the Staff Details page.
3) Change the staff password.

4. Funding Sources, Contracts, Service Hierarchy, and Agency Subservices

A. Setting up Agency Contracts

1) Login to ARIES as your agency administrator.
2) Choose the Find→Agency menu item and click the Search button.
3) Click on the agency name in the search results to see the detail page.
4) Click on the funding and contracts tab and click Edit to start adding funding sources. Press F1 to get help on the funding sources screen and use section 5.1.3 as a step-by-step guide for entering contracts and subservices.

5. Appointments

A. Working with Appointments

1) Login to ARIES as an agency case manager or medical person.
2) Choose the New→Appointment menu item and enter the information to schedule an appointment for a prospective client.
3) Enter a few more appointments for the coming days and use the search tool to look up the appointments for a given day or for a week.
4) Enter outcomes for some of your appointments and do searches on the outcome values.

6. Clients and Data Sharing

Summary of the benefits of data sharing is at:
http://www.architier.com/ARIES/CommonConcerns.htm

A. Creating a Client

1) Use help section 2.1.2 for detailed steps to create a new client.
2) Login to ARIES as an agency case manager or medical person.
3) Choose the New→Client menu item. First you have to search for the client both at the agency and for all of ARIES to ensure you do not create duplicates.
4) Review the consent to share form with the client and make sure they sign it if they agree to share.

B. Client Intake—Demographics, Housing, Eligibility, Financial, and Insurance

1) After creating a new client, press Save + Next through each of the demographic, housing, agency specifics, eligibility, financial, and insurance screens to see the capabilities of the system.
2) Note the pattern for entering and editing longitudinal data. Press F1 on any screen to access the help.

C. Medical and Medication

D. Risk Factors

E. Needs Assessment, Care Plans, Referrals, and Case Notes

F. Entering a Service for a Client

1) From the Services tab add a new service for the client.
2) The client information should be prefilled. Note the dependencies in the service hierarchy. Press F1 for help with this page.
3) Try finalizing a service.
4) Try deactivating a service that was entered in error.

G. Programs

1) From the Programs tab assign a staff person to the client
2) Enroll a client in TMP
    a. Enter new test results in service history
    b. Change client's program status
3) CMP/MCWP

a. Enroll a client
b. Enter adherence assessment
c. Change client's program status

4) CARE/HIPP
   a. Enroll a client
   b. Enter client's insurance information
   c. Change client's program status
5) EIP
   a. Enroll a client
   b. Perform intake assessments
   c. Enter biannual assessment information
   d. Change client's program status
6) Program Summary

7. Reports, Filters, and Printing

A. Client Reports

B. Other Built-in Reports

C. Compliance Reports

D. Cross-tab Wizard

E. Exporting Report Results

F. Ad-hoc Report Wizard

1. Get a new certificate for ARIESReportExport
2. Log in to ARIESReportExport and create a new report
3. Step through the wizard screens using the tutorial in section 1.3 as a guide. First create a simple report showing service details for a client (1.3.1). Remember to draw the report before starting the wizard!
   Then enhance the report with formatting (1.3.2) for the column names, two decimal money values, and dates without times (go to msdn.microsoft.com and search for "Convert SQL Server" for formatting details).
   Then try an aggregate report for client services (1.3.3).
   The following are suggested additional reports to try:
4. List upcoming appointments for a staff person with filters on staff and appointment date/time.
5. For periodic services (e.g. assessments), enter the Next Service Date on the Service screen. This is useful as a reminder mechanism for upcoming services. Create a report that shows the upcoming services for a staff person with filters on the next service date and the staff person.

6. It might be useful to find care plans where there is not much progress. Create a report that shows Care Plans where the date completed is null with filters on the staff person and date need identified. Then run the report to find care plans that are months old without any outcome.
7. Create a report to list all related/affected clients who received services with a filter on service date.
8. Create a report to list the number days staff provided services in a reporting period (Hint: COUNT(DISTINCT ServiceLineItem.serviceDate)
9. Create a report to show which staff have the ability to edit signed case notes.
10. Create a report to show the total expenditure for each funding source.
11. Create a report for the staff roster for each agency with the last login

G. Bulk Data Export

H. Data Import