MAI Data Collection Tip Sheets

These one-page "tip sheets" are designed to quickly demonstrate key functions of the ARIES Outreach Services Module, and are written specifically for State-funded Minority AIDS Initiative (MAI) providers. However, the steps are similar for Ryan White providers who use also the module for tracking their Outreach Services and/or Early Intervention Services.

The topics include:

- Tip Sheet A: How do I enter my MAI **clients** into ARIES?
- Tip Sheet B: How do I track my MAI **services** in ARIES?
- Tip Sheet C: I **linked** my client to care. Now what?
- Tip Sheet D: Which **outcome** should I use?
- Tip Sheet E: What do I do if my client is **linked** to care to my agency?
- Tip Sheet F: How do I create a **referral** for an existing MAI client?
- Tip Sheet G: How do I use the Anonymous Client Encounter **(ACE) Dashboard**?
- Tip Sheet H: How do I **check** my data entry?
- Tip Sheet I: Where do I go for **help**?

Definitions

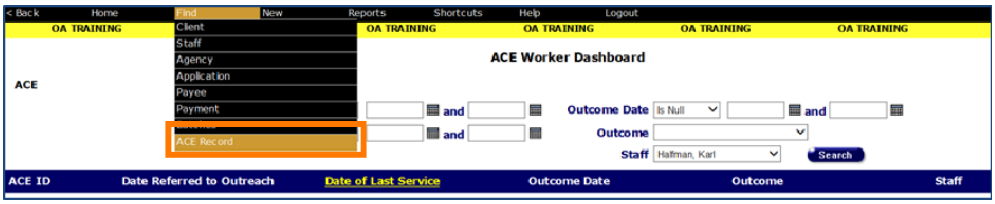
A. Anonymous or ACE (Anonymous Client Encounter) clients are those clients for whom you do not have a signed ARIES Consent Form. You may also not have their ARIES client identifiers (i.e., first and last name, middle initial, date of birth, current gender, and mother's maiden name). As such, these clients must be entered in ARIES's Outreach Services Module and not "full" ARIES.

B. Known clients have provided their client identifiers, signed the ARIES Consent Form, and have been entered into full ARIES.

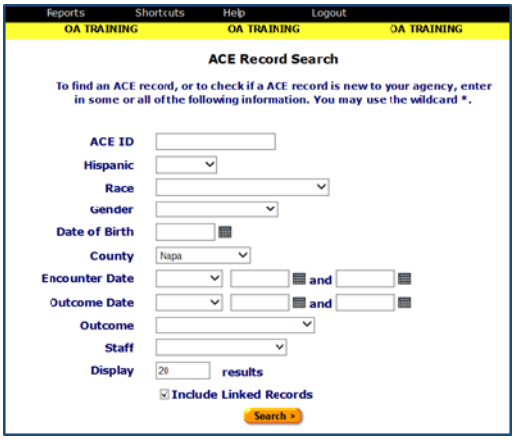
A. How do I enter my MAI clients into ARIES?

If you use full ARIES, the process for entering clients will look very familiar.

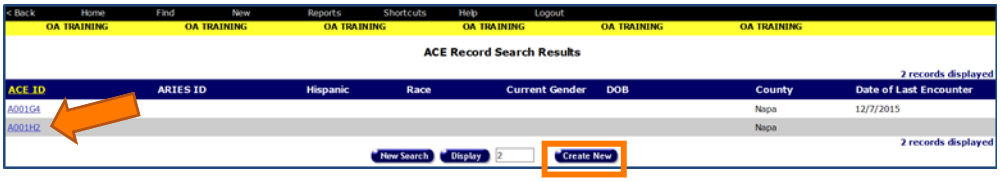
❶ Log into ARIES. Click on the ACE Dashboard button on the Welcome screen.



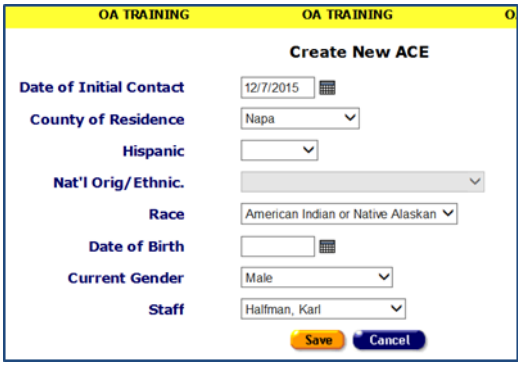
❷ Select ACE Record under the Find menu on the black navigation bar.



❸ Enter as much information as you like on the ACE Record Search screen. Hit the Search button.



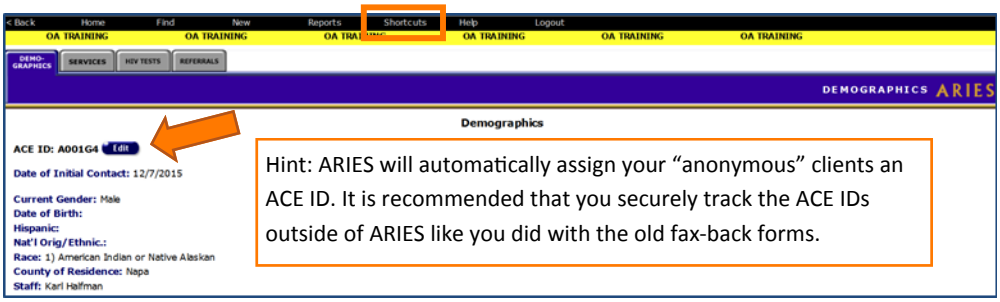
❹ If ARIES finds clients who match your search criteria, you can click on the hyperlink to open the client's record. If ARIES does not find your client, create a new client by clicking the Create New button.



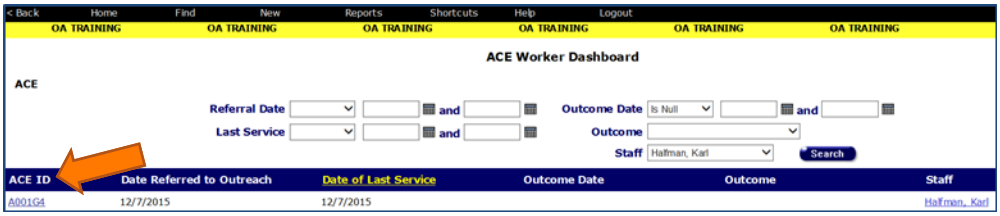
❺ To create a new ACE client record, enter as much information as you know about the client.

- It is important to enter the client's ethnicity (Hispanic) and race. If the client is white, make sure to select the appropriate contract when logging services (see Tip Sheet B).
- Select a Staff name if the client is assigned to a specific outreach worker.

Hit the Save button.



❻ The new client's Demographics screen will appear. Go to the ACE Dashboard using the Shortcuts menu.

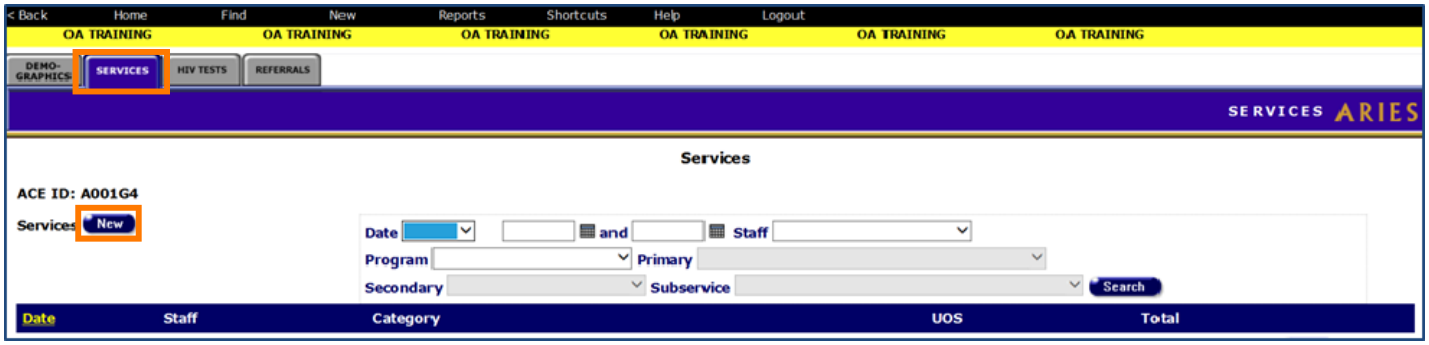


❼ The new client – ACE ID A001G4 – now appears on the ACE Dashboard with an initial referral. You'll eventually want to update that referral with outcome information (see Tip Sheet C).

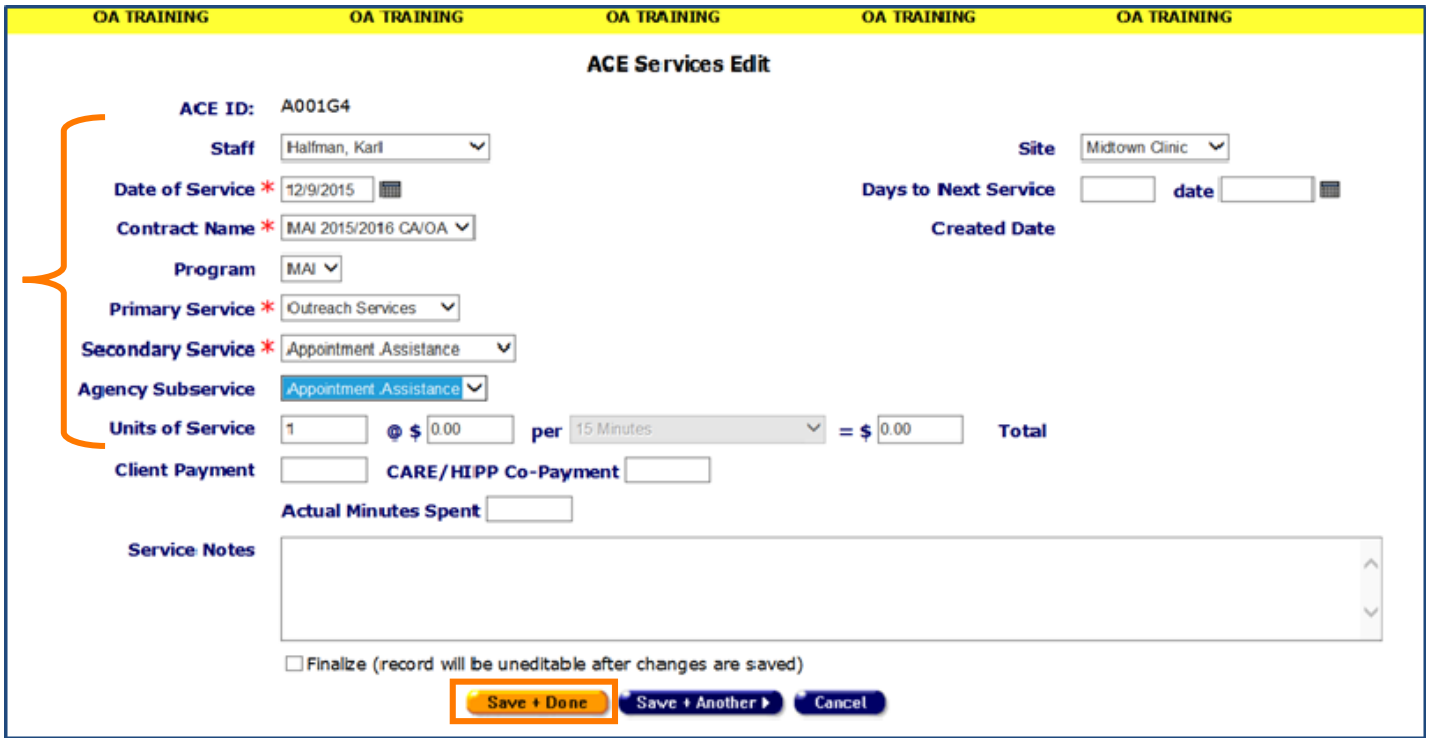
B. How do I track my MAI services in ARIES?

If you use full ARIES, the process for enter services is the same. The goal is to services entered within two weeks of providing them.

1. Search for your client (see Tip Sheet A, Step 1 to 4).
2. When you open the client's record, click on the Services tab and hit the New button.



3. Enter information about the service(s) provided.
   - For State-funded MAI services, select the Contract Name MAI 15/16 CA/OA. The primary services for this program are either Outreach Services or Treatment Education.
   - Keep in mind that MAI serves clients of color. If the client is white, you'll want to make sure to select the appropriate contract — such as Outreach or Early Intervention Services under the HIV Care Program — when logging services.



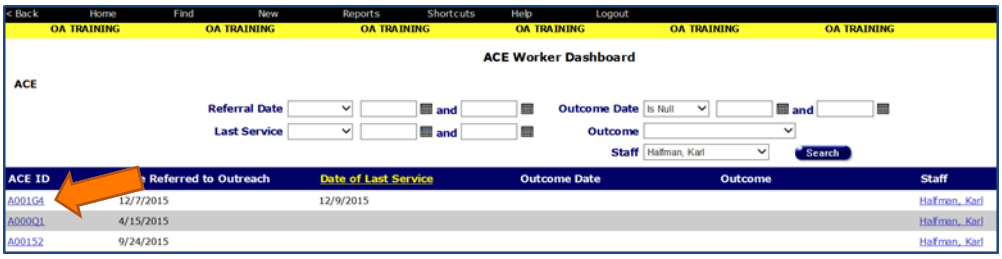
4. Click the Save and Done button.

C. I linked my client to care. Now what?

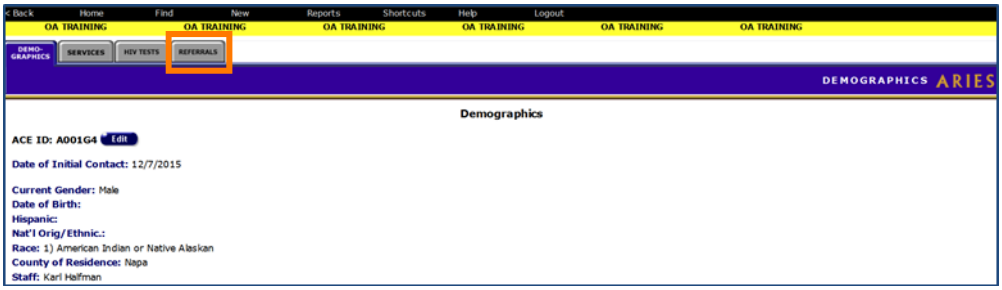
Documenting the outcomes of your efforts to link or re-engage clients in care is important. The State Office of AIDS uses this data for program planning and evaluation for MAI, as well as reporting to our federal funder.

❶ Log into ARIES. Click the ACE Dashboard button.

❷ By default, you will see all of your clients who have not had an Outcome Date and Outcome entered (i.e., active clients). Click on the hyperlink for the client you were successful in linking to care – let's use ACE ID A001G4. (Note: If your client already exists in ARIES, click on their ARIES ID in the ARIES table below the ACE table.)

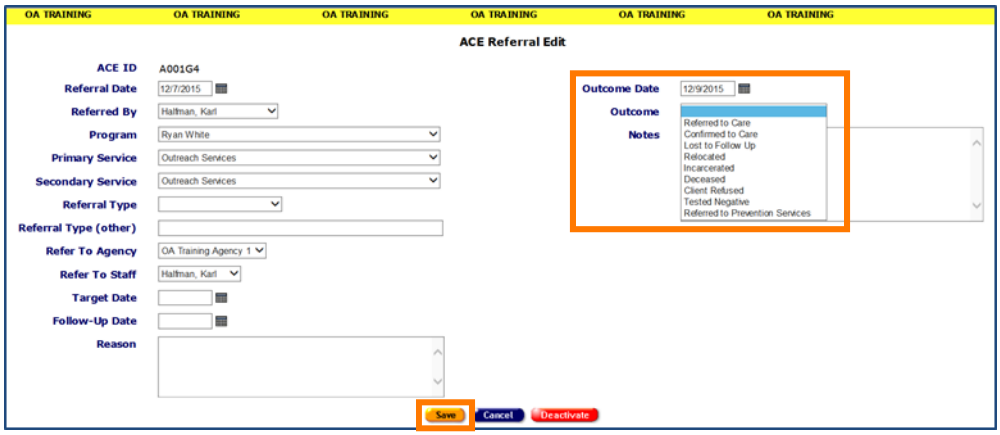


❸ The client's Demographic record will open. Now click on the Referrals tab. (Note: If your client already exists in ARIES, click on the Care Plan tab, and then click the Referrals subtab.)

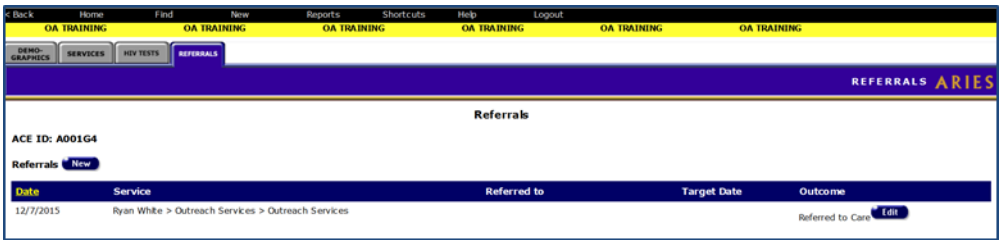


❹ Click the Edit button for the Referral for which you want to assign an Outcome. In this case, it is the initial referral that was generated when you created this client.

❺ The client's Referral record will open. The left-hand side of the screen was completed when the Referral was initially created. To document the results of your efforts, select an Outcome from the dropdown list (see Tip Sheet D) and enter an Outcome Date. Then click Save.



❻ You will return to the client's Referrals tab.



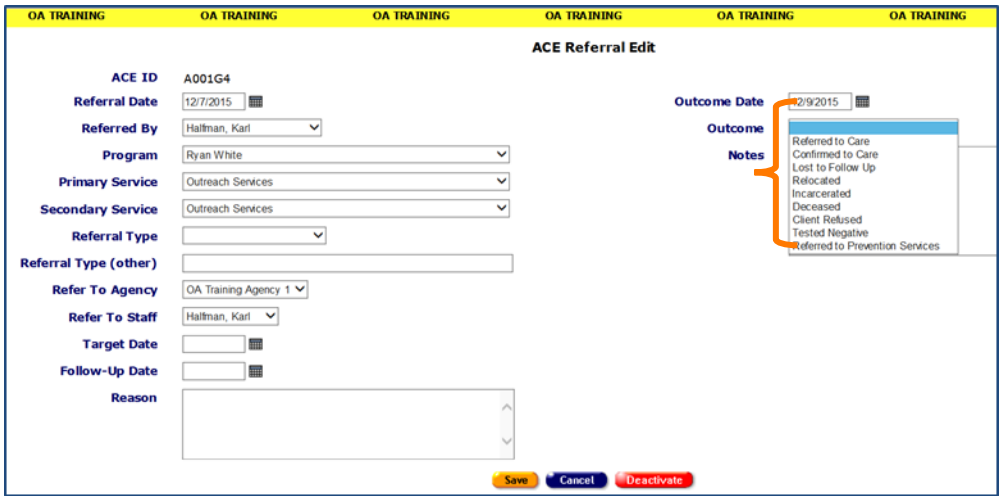
D. Which outcome should I use?

Some outreach workers establish a time frame for working a referral (e.g., 90 days). Other outreach workers continue to work with a client after the initial medical visit linkage, perhaps attending most of the medical visits or periodically checking in with the client. Though ARIES supports either of these approaches, it is important to enter an outcome even if you continue to work with the client. This will not preclude you from entering additional referrals or services for the client. It allows providers to consistently count successful linkages and allows OA to report to our federal funder.

From the Referral screen (see Tip Sheet C), you can select from eight outcomes. You should select the one Outcome that best describes the result of your outreach efforts for a given referral.

❶ If you received a referral, but discover that the client is already (or still) in medical care use:

- *Already in Care (Confirmed)* if you confirmed through other sources (such as HIV surveillance, ARIES, provider, etc.).
- *Already in Care (Self-Report)* if the client tells you so.



❷ If you are able to connect the client to medical care or the AIDS Drug Assistance Program (ADAP), use:

- *Referred to Care* for passive referrals such as setting up a medical appointment or providing a written referral.
- *Confirmed to Care* for active referrals such as walking the client over to clinic in-take staff or attending the first medical appointment with the client. If you are able to confirm a passive referral (e.g., the provider confirmed that the client went to the appointment), you can change (edit) *Referred to Care* to *Confirmed to Care*.

❸ Use *Client Refused* if you were able to locate the client, but he or she did not want MAI services.

❹ If you aren't able to locate a client, use an outcome that explains why:

- *Relocated* if the client moved another county or state. If you know the county or state, enter it in the Notes field.
- *Incarcerated* if the client is in jail or prison.
- *Deceased* if the client has died.
- *Lost to Follow Up* if you have exhausted all your efforts on behalf of the client.

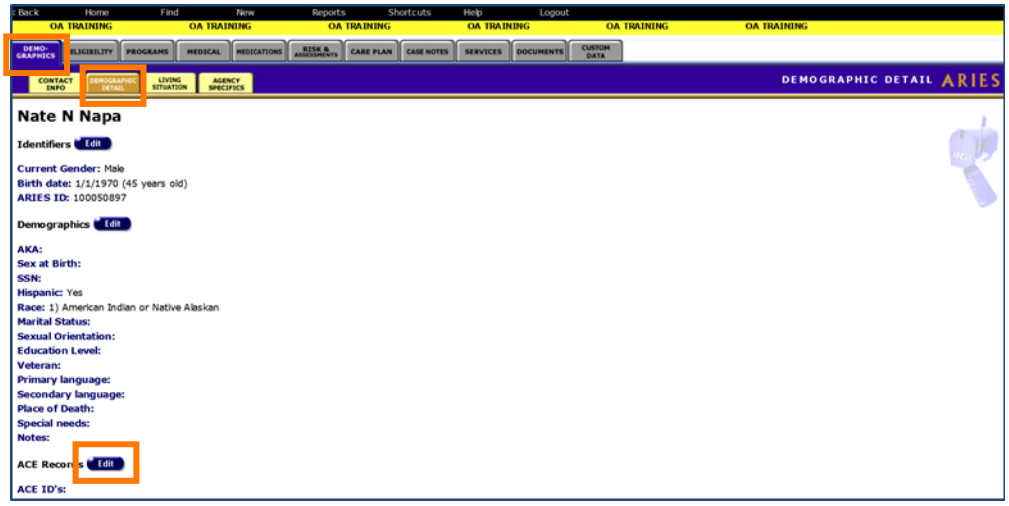
❺ There are two options that should not be used for MAI clients:

- *Referred to Prevention Services* is used for HIV-negative people who are referred to Prevention Services (including PrEP). Since MAI services are for HIV-positive individuals, you won't use this outcome for MAI.
- *Tested Negative* is for programs that provide HIV tests for "anonymous" clients but do not refer them to Prevention Services. Since MAI does not pay for HIV testing, you won't use these outcome for MAI.

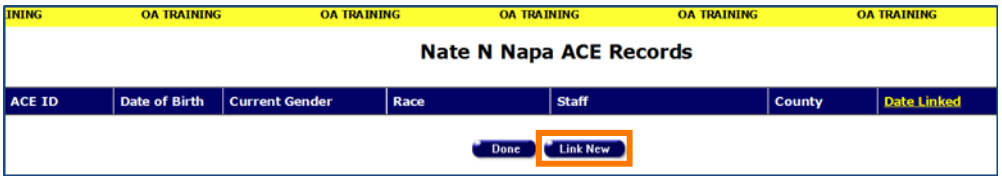
E. What do I do if my client is linked to care to my agency?

You have successfully linked the client to care at your agency. This means you confirmed with the in-take worker or case manager that the client (1) provided their identifiers (i.e., first and last name, middle initial, date of birth, current gender, and mother's maiden name), (2) signed the required ARIES Consent Form, and (3) was enrolled into full ARIES. At this point, the client's records – Mr. Napa in the example below – exist in ARIES twice: once as an anonymous ACE client, and again as a known ARIES client. You'll want to take the extra step to link the client's ACE and ARIES records so that staff working with Mr. Napa can see the big picture.

❶ As soon as the client has been registered in full ARIES, go to the Demographics tab and then the Demographic Detail subtab. Click on the Edit button next to ACE Records.

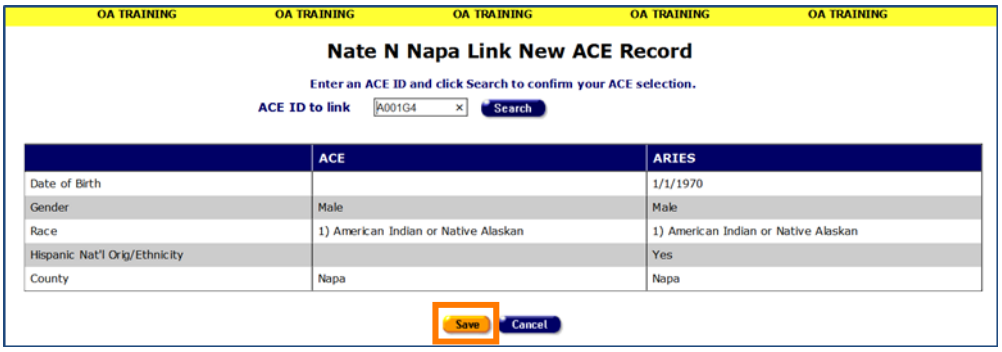


❷ Click the Link New button.



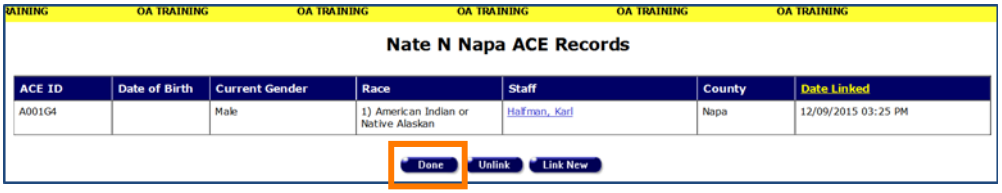
❸ Type in the clients ACE ID – A001G4 in this case – and hit the Search button.

❹ Compare the client's demographic information from his ACE record to his ARIES record. If you are sure they are the same person, click Save.

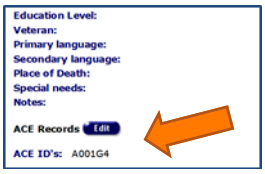


	ACE	ARIES
Date of Birth		1/1/1970
Gender	Male	Male
Race	1) American Indian or Native Alaskan	1) American Indian or Native Alaskan
Hispanic Nat'l Orig/Ethnicity		Yes
County	Napa	Napa

❺ A confirmation screen will appear. Click the Done button to confirm. If you mistakenly link a client, please call the ARIES Help Desk (1-866-411-ARIES).



❻ When you return to the client's Demographic Detail subtab, the ACE ID will appear. Note that an ARIES client may have multiple ACE IDs.

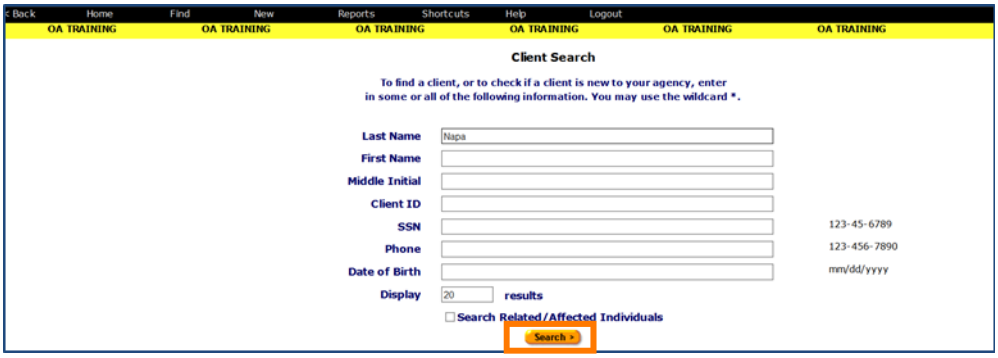


F: How do I create a referral for an existing MAI client?

A client must have a referral to get into the Outreach Services Module. ARIES automatically generates such a referral for anonymous clients who are created through the Outreach Services Module (see Tip Sheet A, Step 7). For agencies doing in-reach, staff will need to create a referral for these existing clients in ARIES who have been lost to care.

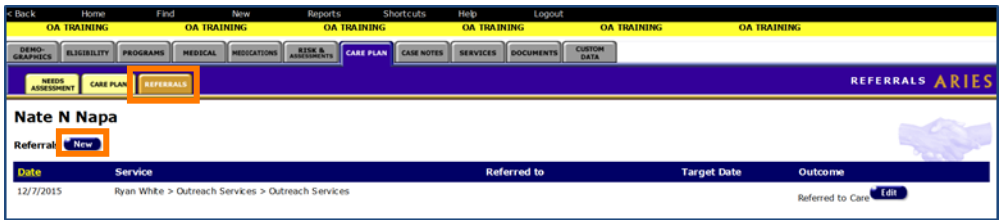
❶ Log into ARIES. Click on the Clients button on the Welcome screen.

❷ We will search for a former anonymous client you linked to last year—Nate Napa. Enter as much information as you like into the Client Search. The click the Search button. If ARIES finds multiple matches, the Search Results will display. If there is only a single exact match, ARIES will open the client's record.

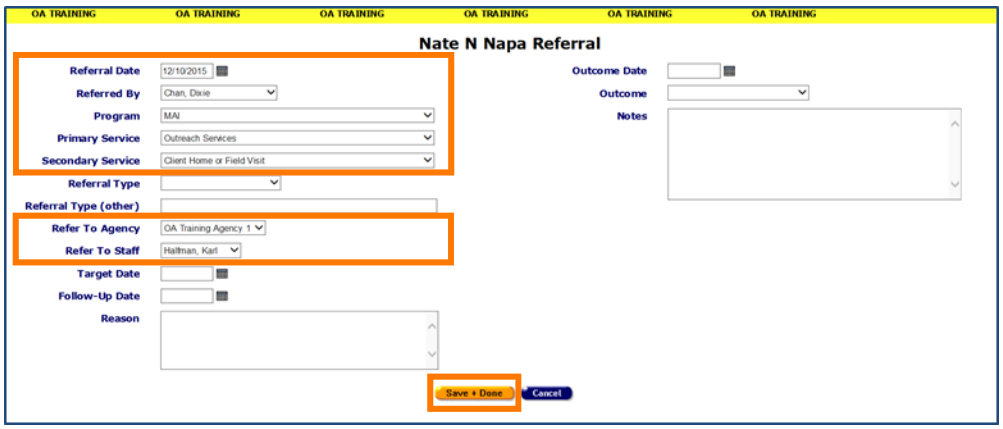


❸ Click on the Care Plan tab.

❹ Click on the Referrals subtab. Notice Mr. Napa's previous referral is listed. But since he has fallen out of care again, a new referral needs to be created. Click the New button.



❺ The outreach worker or any ARIES user in their agency can generate a referral. Complete the fields on the left-hand side of the screen. For Primary Service, select Outreach Services or Treatment Education. Select your agency in the Refer to Agency field. Select a specific outreach worker to assign the client to in the Refer to Staff field. Click Save and Done.



You'll eventually want to update that referral with outcome information (see Tip Sheet D).

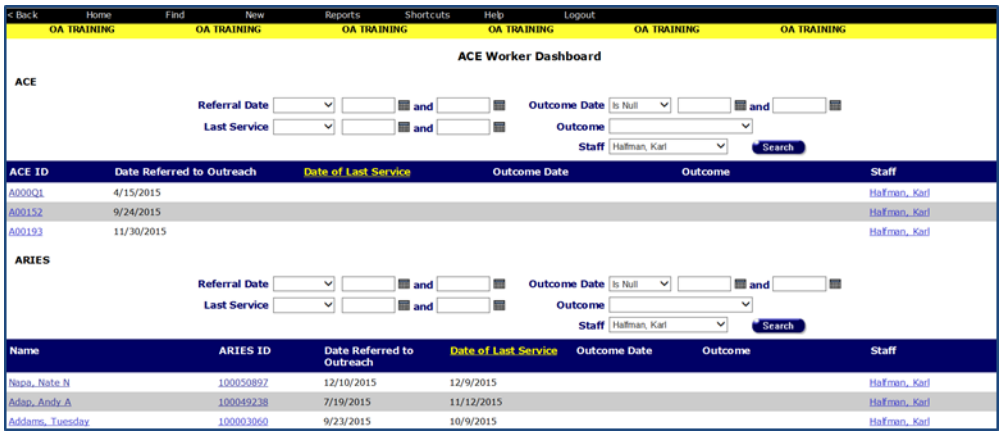
G. How do I use the ACE Dashboard?

The ACE Dashboard can help outreach workers manage their caseloads and document their progress.

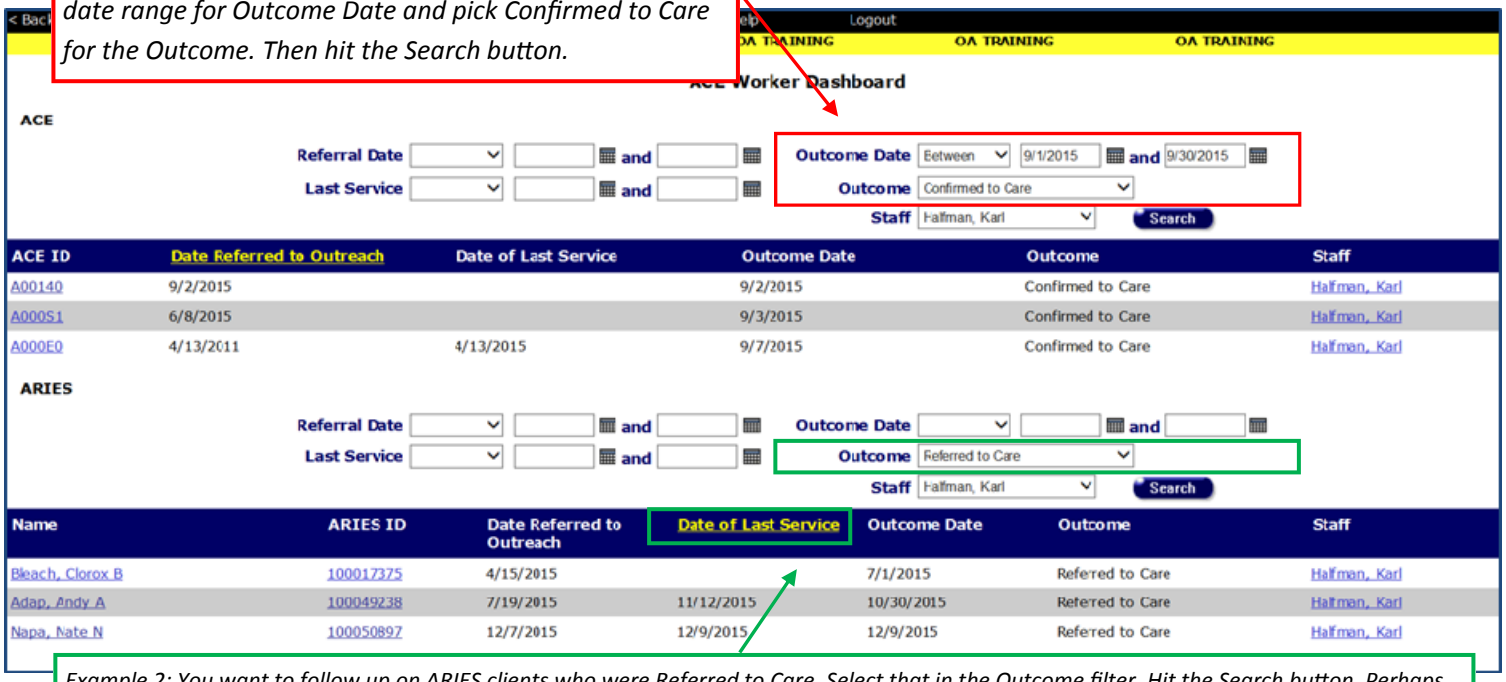
❶ Log into ARIES. Click on the ACE Dashboard button on the Welcome screen.

❷ By default, the ACE Dashboard opens to show all your active clients (i.e., clients with no outcome and outcome). The top table shows all your anonymous clients, while the bottom shows all your known clients who registered in 'full" ARIES.

❸ Use the filters to refine your list. Click on the table header to sort the columns.



Example 1: Your manager wants to know which clients you linked to care during September Select the appropriate date range for Outcome Date and pick Confirmed to Care for the Outcome. Then hit the Search button.



Example 2: You want to follow up on ARIES clients who were Referred to Care. Select that in the Outcome filter. Hit the Search button. Perhaps it's a long list. Click on the Date of Last Service header to sort the list. Now you see that Clorex Bleach was referred to care on July 1, but hasn't had any subsequent service entered into ARIES.

H. How do I check my data entry?

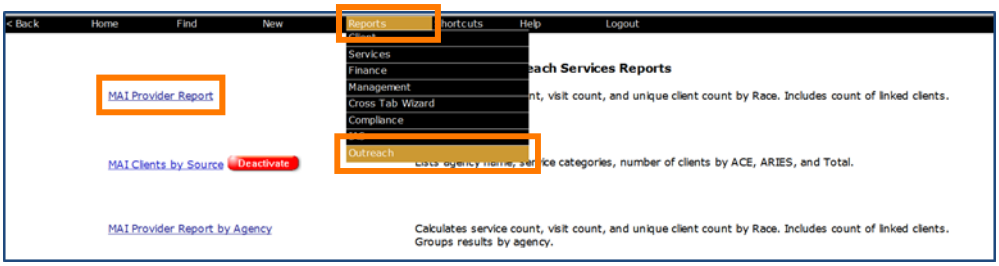
You may want to run a quality check as you enter your MAI data. The MAI Provider Report can help you do this.

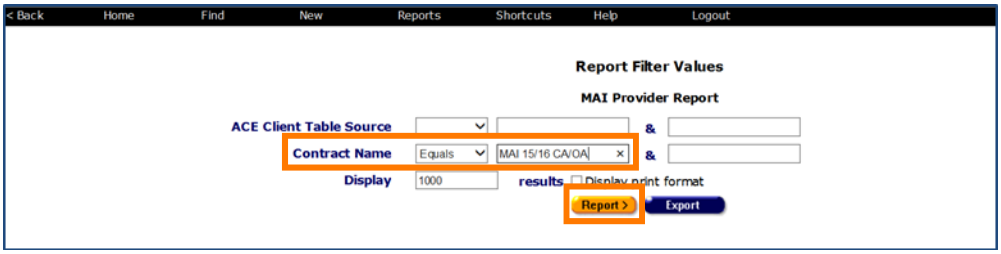
❶ Log into ARIES. Click on the Reports button on the Welcome screen.

❷ From the Reports menu, select Outreach. Then click on the MAI Provider Report link.

❸ For Contract Name, select Equals and enter MAI 15/16 CA/OA. Hit the Report button.

❹ ARIES will generate a report showing data on MAI clients served during FY 2015/16 broken down by primary service and race/ethnicity. For each group, ARIES calculates the number of: (1) service records, (2) visits (i.e., multiple services provided on the same day are counted as one visit), (3) clients, (4) clients linked to ANY care (i.e., those with a Referred to Care or Confirmed in Care outcome on their Referrals), and (5) clients linked to ARIES care (i.e., client registered in full ARIES). The report can help identify data entry issues in the many ways.





Example 1: If your Linked to ANY Care numbers seem low, make sure your clients have an initial Outreach Services or Treatment Education Referral (see Tip Sheets F) and that you assigned an outcome at the appropriate time (see Tip Sheets C and D).

Example 2: If your Linked to ARIES Care numbers seem low, make sure you are linking your clients' ACE and ARIES records together if they are enrolled in ARIES (see Tip Sheet E).

MAI Provider Report

Contract	Primary Service	Race	Services	Visits	Clients	Linked to Any Care	Linked to ARIES Care
MAI 15/16 CA/OA	Outreach Services	Asian	13	12	3	0	0
MAI 15/16 CA/OA	Outreach Services	Black or African American (not Hispanic)	39	37	7	0	0
MAI 15/16 CA/OA	Outreach Services	Hispanic or Latino(a)	26	25	6	1	0
MAI 15/16 CA/OA	Outreach Services	Unknown/Unreported	3	3	1	0	0
MAI 15/16 CA/OA	Outreach Services	White (not Hispanic)	15	12	3	0	0

5 records, generated 12/10/2015 9:16:55 AM
Criteria: Contract Name = 'MAI 15/16 CA/OA'

Export

Example 3: If you have white clients, be sure to select the appropriate contract/ program when entering their services into ARIES (see Tip Sheet B, Step 3).

Example 4: If you have a high number of clients with an unknown/unreported race, be sure that you are reporting their race/ethnicity ***when*** *known (see Tip Sheet A, Step 5.)*

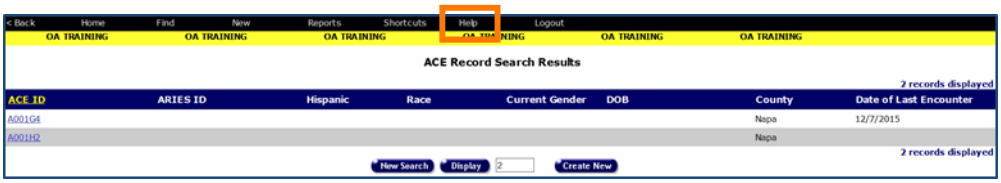
Example 5: If your services or visits seem low, be sure your are entering all the services you provided (see Tip Sheet B). Keep in mind that services provided on the same day are counted as one visit.

Example 6: If your client count seems low to you, be sure your are entering all your MAI clients (see Tip Sheet A) and services (see Tip Sheet B).

I. Where do I go for help?

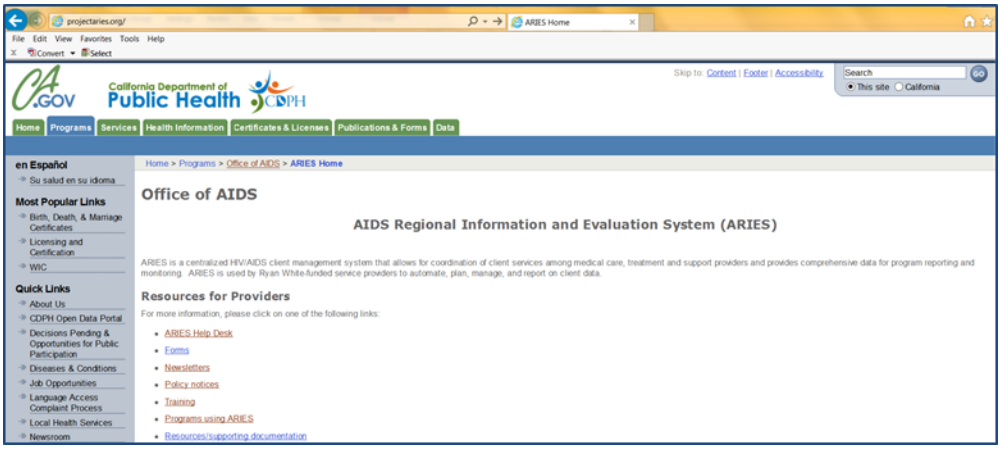
There are a number of places to go for help.

❶ Select Help from the black navigation bar, or press the F1 key, while logged into ARIES to open the ARIES User Manual.



❷ Visit www.projectaries.org and click on the:

- Newsletters link to read The ARIES Advisor (June 2015),
- Training link to view the recording of ARIES Outreach Services Module Training (July 2015), and
- Programs using ARIES link to get copies of this Tip Sheet and the forthcoming Data Collection Guidance.



❸ Contact the ARIES Help Desk at helpdesk@projectaries.org or 866-411-ARIES (2743) or if you:

- Have "how to" questions,
- Need to design a data report, or
- Have other technical assistance needs.