

Printed Documentation

Table of Contents

Logging On and Off of AIM.....	1
Logging On.....	1
Information Security.....	3
Protect Client Information.....	3
Resetting Passwords.....	4
Activity Management.....	9
Activity Setup Screen.....	9
Setting Up Activities.....	10
Unit Cost Methods.....	12
Deleting Activities.....	12
Renaming Activities.....	13
Examples.....	14
Client Quick find Introduction.....	17
Quick Find Basics.....	17
Client Screen Tour.....	19
Quick Link Buttons.....	19
Client Information.....	19
Custom Screens.....	21
Client Management.....	23
Insert a New Client.....	23
Enter new Information.....	25
City/County/Zip.....	27
Aggregate Clients.....	29
Existing Clients.....	31
Updating Client Information.....	31
Deleting and Restoring Clients.....	33
Delete and Restore.....	33
Client History.....	35
Analyzing Histories.....	35
Managing Caregivers/Care Receivers.....	37
Relationship Process.....	37
Assign clients to Rosters.....	39
Rosters.....	39
Build a Roster.....	39
Add to a Roster.....	41
Add Clients to a Waiting List.....	43
Add and Remove.....	43
Owners Button Purpose.....	45
Owners Button.....	45
Funds Source and Comment Screens.....	47
Personal Income.....	47
Service Management.....	49
Update or Delete a Service.....	49
Five Ways to Enter.....	51

Printed Documentation

Service By Client	51
Service By Activity	55
Inserting Service By Roster	58
Service By Scanner	61
Group Service	64
Group Insertion Error	67
Delete Process	68
Duplicate Service Entry	68
Assessment Management	71
Assessment Screen Tour	71
Initial Assessment	72
Referral Management	77
Enter and Update a Referral	77
Employee management	81
Open an Employee Record	81
Users and Non-Users	82
Insert a New Employee	82
Delete an Employee	86
S56A and C	87
56 General Remarks	87
S56C Expenditures	87
S56A Staffing Info	91
Duplicate Clients	95
Resolving Duplicate Records	95
Memos of Record	103
Current Memos	103
Activity Naming Standard	103
Employee User ID	105
Client ID Standard Format	106
Standard Case required	107
Aggregate Client	107
Ineligible Clients and Services	108
S38	108
Reports	111
How To Read Report Descriptions	111
OKA001 -- (A) Next Assess Date For Clients/Caseworkers	111
OKA003 -- (A) Assessment Dates and Client Names	112
OKA004 -- (A) Nutrition Question Summary by Meal Type	113
OKA005 -- (A) Nutrition Questions (per client) by Meal Type	114
OKA006 -- (A) Unanswered Assessment Questions for a Client	115
OKA007 -- (A) Assessment Details and Client Info	116
OKA008 -- (A) Individual Assessment Details for Current Provider	118
OKA009 -- (A) Individual Assessment Details for any Provider	118
OKA010 -- (A) Individual Assessment Details for a Particular Provider	119
OKA011 -- (A) Individual Assessment Details For a Particular Provider and Date	119
OKA012 -- (A) Clients Grouped by Assessment Date/Provider	120

OKA013 -- (A) Clients with Assessment Date/Provider Listed.....	121
OKA016 -- (A) Assessment Dates for Clients not Served	122
OKA017 -- (A) Assessment Data for a Single Client.....	123
OKA018 -- (A) Latest Assessments	124
OKC100 -- (C) Clients And Addresses For A Roster	125
OKC101-- (C) Sign In Sheet.....	126
OKC102 -- (C) Sign In Sheet (Weekly Legal Size)	126
OKC103 -- (C) Sign In Sheet (Weekly) (No Age)	127
OKC104 -- (C) Caregivers with Care Receivers List	128
OKC105 -- (C) Caregivers with Care Receivers W/Addresses	128
OKC106 -- (C) Sign-In Sheet No Age (Reversed 103)	129
OKC107 -- (C) Care Receivers W/O Caregivers.....	130
OKC108 -- (C) Clients With Services	131
OKC109 -- (C) Clients by Provider and Service (Active).....	132
OKC110 -- (C) Clients by County and City	133
OKC111 -- (C) Minority Clients Over 60 In Poverty.....	134
OKC112 -- (C) Clients by Service Activity and Service Date (W/Deletes).....	135
OKC113 -- (C) Clients and Addresses by Activity	136
OKC114.....	136
OKC115 -- (C) ADvantage Client's Service Schedule	137
OKC116.....	137
OKC117 -- (C) Clients Deleted by a Provider.....	137
OKC118 -- (C) Sample List of Clients	138
OKC119 -- (C) Waiting Lists	139
OKC120 -- (C) Waiting Lists W/ADL Score	140
OKC121 -- (C) Multiple Owner Clients	141
OKC123 -- (C) All Clients Referred by a Provider	142
OKC124 -- (C) All Clients Referred to a Provider	143
OKC125 -- (C) Unverified Clients Referred by a Provider.....	143
OKC126 -- (C) Unverified Clients Referred to a Provider.....	144
OKC131 -- (C) Mailing Labels By Roster.....	145
OKC132 (C) Clients Without Caseworkers.....	146
OKC133(C) Clients By City and Activity	146
OKC` 134(C) Clients by Provider and Taxonomy	147
OKC135(C) ADvantage Clients by Date and Activity.....	148
OKC138(C) Caregivers With Care Receiver's Diagnosis	149
OKC139(C) Clients with Latest Service Date	149
OKC140 -- (C) Clients with Emergency Contact Info	150
OKC141 -- (C) New Clients for a Provider	151
OKC143 (C) Clients: their Age and Caseworker	152
OKC144(C) Caregivers/Care Receivers: Address/Diagnosis.....	153
OKD200 (D) Erroneous Birth Dates on Clients	154
OKD202 (D) Counties Entered Wrong in Client Records.....	154
OKD203(D) NAPIS Groups and Associated Activities	155
OKD204 (D) Incorrectly Formatted Activity Names for a Provider	156
OKD205 (D) Zip Codes in Routes.....	158

OKD206 (D) Reports in AIM.....	159
OKD208(D) Service Activities with Service dates 2 Years or Older.....	160
OKD209(D) Service Dates Prior to Dates Entered.....	161
OKD210 (D) Service Dates Future to Date Entered.....	162
OKD211 -- (D) New Client Entries that are Duplicates.....	163
OKD212 -- (D) Duplicate Clients.....	164
OKE300(E) Employees and Titles.....	164
OKE301(E) Provider's Names and ID Numbers.....	165
OKG401(G) Key Indicators (STO Only).....	166
OKG403(G) Number of Clients by Age/Demographic (STO Only).....	167
OKG404(G) Expenditures by AAA, Annual (STO Only).....	167
OKG405 (G) Legal Stats of Closed Cases.....	168
OKG406(G) Legal Stats of Closed Cases All State.....	169
OKN500(N) Numbers of Clients by Age/Demographics.....	170
OKN501(N) Estimated Clients and Units Breakdown/ RFP.....	171
OKN502(N) Number of Clients By City for a Provider.....	172
OKN505 (N) Number of Clients By County.....	173
OKN506 (N) Population Demographics (Area Plan).....	174
OKN507 (N) Volunteers and Volunteer Hours.....	175
OKN508(N) Client/Service Numbers by Taxonomy and Month.....	176
OKN509 (N) Client/Service Numbers (Owned Clients Only).....	177
OKN510(N) Client/Service Numbers (Archived Only).....	178
OKN511(N) Client/Service Numbers (Metro Trans).....	178
OKN513(N) Client/Service Numbers (Includes Deleted Clients).....	179
OKN514(N) Group Services With Est Clients.....	180
OKN515(N) Numbers of Clients/Services by NAPIS Group.....	181
OKN516(N) Client/Service Numbers by Taxonomy (AAA Only).....	182
OKN517 (N) Number of Clients by Race/Poverty/Activity with Units.....	183
OKN518(N) Numbers of Clients/Meals Paid by Title III E.....	184
OKN519 (N) Number of Clients by Race/Ethnicity.....	185
OKP600 (P) Care Giver Demographic Two-Year Comparison.....	186
OKP602 (P) Fed Fiscal Yr Expenditure Comparison by AAA.....	187
OKP603(P) Data Analysis on a Provider.....	188
OKP604 (P) S56A Staffing Report.....	189
OKP605 (P) S56C Expenditures Report.....	190
OKP606 (P) Zip Codes that are Incorrect.....	191
OKP607 (P) Compare Expenditures Between Two AAAs.....	192
OKP608 (P) Compare AAA Expenditures for a Service.....	193
OKP609(P) Compare Provider Units for a Service.....	194
OKP610(P) Population Demographics by County/Service.....	195
OKP611(P) Two Year Unit Comparison/Fed Fiscal Yrs.....	196
OKP612 (P) Assessments with Future Dates.....	197
OKP613 -- (P) S56C Spending Report Status.....	198
OKP614 -- (P) Annual Unit and Cost Analysis.....	199
OKS700(S) Meal Roster, Monthly-Landscape w/o ssn.....	200
OKS701(S) Meal Roster, Monthly-Landscape with DOB.....	201

Table of Contents

OKS702(S) Meal Roster, Monthly-Landscape (medicaid)	201
OKS703 -- (S) Meal Roster, Monthly-Landscape (Mobile Meals)	202
OKS704(S) Meal Roster, Monthly-Landscape (no names)	202
OKS707(S) Service Activities with Late Entry Dates	203
OKS709 -- ADvantage Meal Roster Monthly Landscape w/o ssn	204
OKS712(S) Clients Not Lately Served	204
OKS713(S) Group Services with Est Clients	205
OKS720(S) Client's Service List by County	206
OKS738(S) Meal Numbers (S38 Monthly)	207
Glossary	209
Index	213

Logging On and Off of AIM

Logging On

Two Log on's are required

When using the AIM database program there are two separate logons you must perform in order to access your data. First you must first log onto the AIM web site and then log onto the AIM database.

Remote Desktop

The AIM web site is logged onto through Remote Desktop Connection which is a Microsoft Windows program on your computer that gives you access to the web site where your AIM data is stored. Because there are a variety of Windows systems in use there are also a variety of Remote Desktop Connection screens users might see. Talk to your local computer administrator for the specific procedures you will use. You may also call the Saber Corporation at 888-373-2090 or go to the main web page for instructions at www.sabersite.com

Your AIM Database

Once the connection to the web site is complete you will see the logon screen for the AIM Database, as seen in the illustration to the left which is the second logon.

Advanced Information Manager

AIM

Advanced Information Manager
By
Saber Corporation

Version 11.1.0.15 built 05/20/2008 5:43 am
Database Version 09.02.05 built 02/07/2007

AIM Path C:\OKState11\
Data Source Name OKState

Email: support@sabersite.com **Phone:** (888) 373-2090
Website: www.sabersite.com **Fax:** (803) 328-2868

Please Enter your User ID and Password.

User ID:

Password:

Automatic Logout

The second User ID and password is provided by the Oklahoma State Office

The **Automatic Logout** option can be used when you want to set a time limit for a particular AIM session.

Information Security

Protect Client Information

PROTECTING YOUR INFORMATION

Information security is a very serious issue that is largely overlooked by many users and information managers. Two predominate reasons are that people think security is too time consuming and they are under the impression that no one really cares about stealing the information they work with.

- All types of information are always wanted by somebody. But not everyone has a right to information entrusted to you. An easy way to determine whether a person has a right to the information entrusted to you is by asking three questions about him or her. Need to know? Need to have? Need to see? Can you answer at least one of these questions, "yes," for every person who has physical access to your work area? Anyone who can walk up to your work area who has neither a need to know, have, nor see the information you work with is a potential threat. He/she may be your friend or even a relative. Information protection is not merely an issue of who you trust.
- Each AIM database user is personally responsible for the protection and safeguarding of information entrusted to his/her care. If you have access to any kind of information, which means you have permission to see it, then you are entrusted. When you are required to use a logon identification and/or password in order to gain access to information then you must protect the passwords as well.
- Two principles of Information Protection/Security that should become everyday language for you are Denying and Granting access.

Denying access

The steps that you take to deny the wrong people access to the information entrusted to you will be the primary determination of whether or not your information is safe.

Following are some suggestions that will help you ensure your information is adequately protected. This list is by no means conclusive.

1. A password should be a combination of letters, numbers and symbols that is easy for you to remember but difficult for someone else to guess.
2. Making your passwords difficult to guess includes changing them periodically.
3. Don't make public knowledge of the type of information you have access to.
4. Don't share passwords with other people.
5. Don't leave passwords in conspicuous places.
6. Don't walk away from your work area with information exposed.
7. Keep doors locked.
8. Secure unattended equipment.

9. Don't keep things in your work area that might attract people who belong there (money, jewelry, personal electronics, etc).
10. Don't store private or confidential information on hard drives.
11. Ensure your computer system is equipped with a secure time-out option.
12. Keep your virus protection updated and install all computer system upgrades and patches that are released for security purposes.
13. Don't transport private or confidential information away from your immediate work area unless you have been authorized to do so.
14. Implement and be able to explain the information security plan for your office.

Ensuring access

Ensuring that information remains available to the right people who need it is a huge part of information protection.

- Two reasons people are unduly denied access to their information are computer system failures and weather outages. Developing a contingency plan gives you alternatives to resort to during certain types of emergencies. A contingency plan might include step-by-step instructions, phone numbers, points of contact, procedures, etc.
- Forgetting passwords is another reason people are often unable to access their own information. There are a number of different ways to protect passwords against forgetfulness. Trusted partners, store in wallet or purse, store at home and using word association memory method are a few.

There are also a number of irresponsible ways to remember that are just like not using password protection .

- Leaving a sticky note on your computer screen, your calendar, the side of a tissue box or on a picture.
- Using names, memorable dates and places for passwords make it easy for someone who knows you to guess your password.
- Allowing your computer system to remember passwords for the purpose of automatic logons is risky and doing so would require you to carefully and strictly control electronic and physical access to your computer.

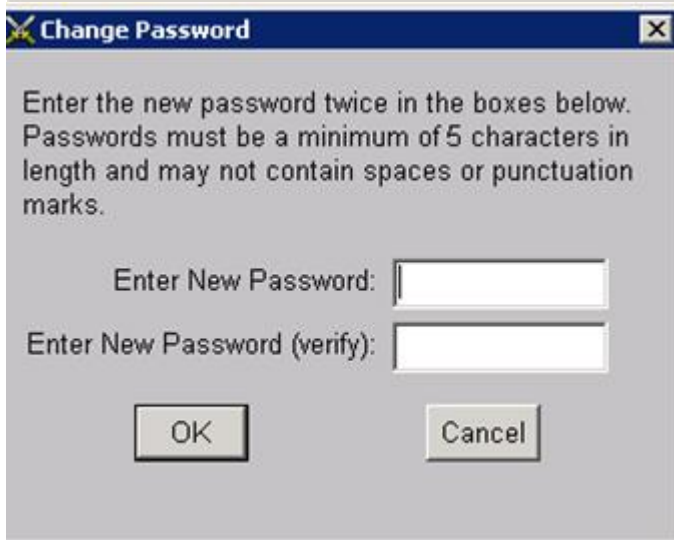
Resetting Passwords

New user accounts are created for AIM using default passwords which are usually very simple in order to facilitate the first-time logon. Passwords must never be left as the default. When you are logging onto AIM for the first time you need to immediately change your password. If you are still using a default password now you must change it immediately.

To change your own AIM password you have to first be logged onto AIM. Click the Menu item Options then click Change Password



The screen below will be blank. Enter the password you last used to log on to AIM. As you can see, only dots are displayed instead of your actual password. Click Verify.

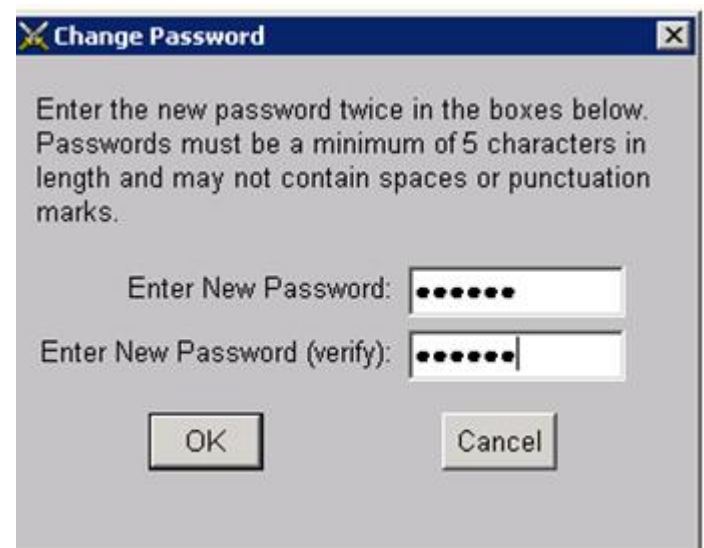


Next you will see the illustration below on the left.

Enter your new password as shown on the right. Note again that the password is displayed in dots so make sure you know what you typed in.

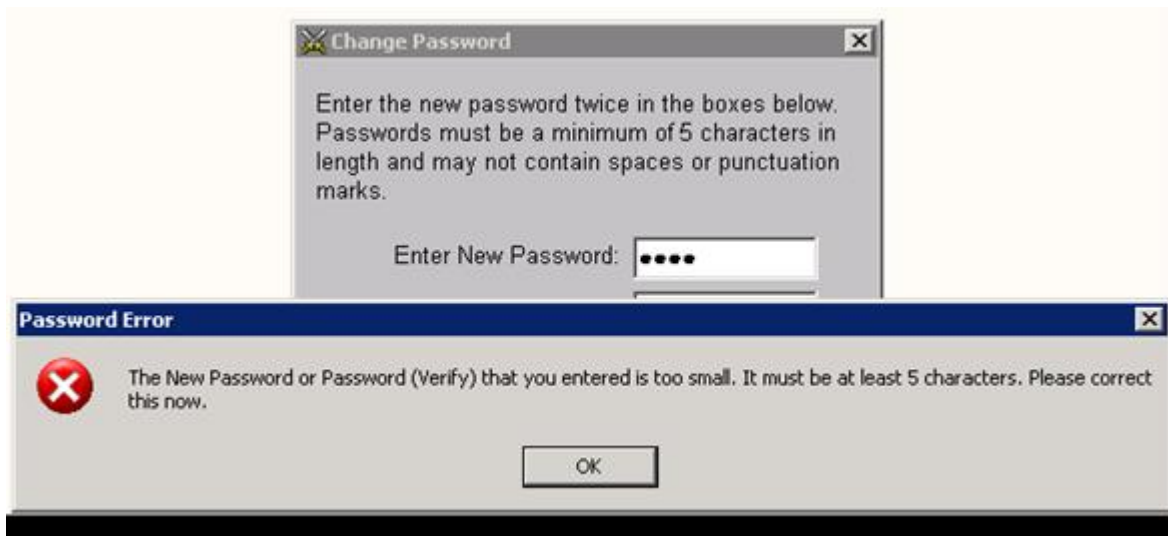
eight characters is best and using a combination of letters numbers and special characters is highly recommended. AIM passwords are not case sensitive.

AIM requires you to use at least five characters. However, a minimum of





The illustration below shows what you will see if you entered an authorized password and correctly repeated it. The illustration below shows what happens when you don't enter enough characters.



The next illustration shows what happens when the passwords in the two fields do not match. A difference in this error message is that you can click No to tell AIM to disregard your changes.



Activity Management

Activity Setup Screen

The Activity Group, Program Group, Funding Source and NAPIS Group are all selected from drop-down list that are displayed when you click the black arrow at the left end of the field.

AIM Hosted: User is Acting as provider: AIM Training - [New Activity]

File Edit Locate Screens Options Window Help

Close Save Print Screen Report Insert Delete Rec Undo Cut Copy Paste Quick Find Previous Next First Last

Activity Name

Activity Group

Program Group

Funding Source

Napis Group

Transfer NSIP Unit Cost Provider Id

Start:	End:	Authorized:	Instructor:	Locationid:	Unit Cost:	Units Budgeted:
--------	------	-------------	-------------	-------------	------------	-----------------

Authorizations

The **activity name** describes a congregate meal served in county #55 which is Oklahoma County and the actual name of the site is the Nature Park Pavilion.

The **activity group** is always going to be the name of the Provider/Project.

Program group is always going to be your AAA.

Funding source will correspond with the type of service being provided. If you are unsure see your project director or contact your AAA planner.

The **NAPIS group** is the taxonomy of the service you are providing.

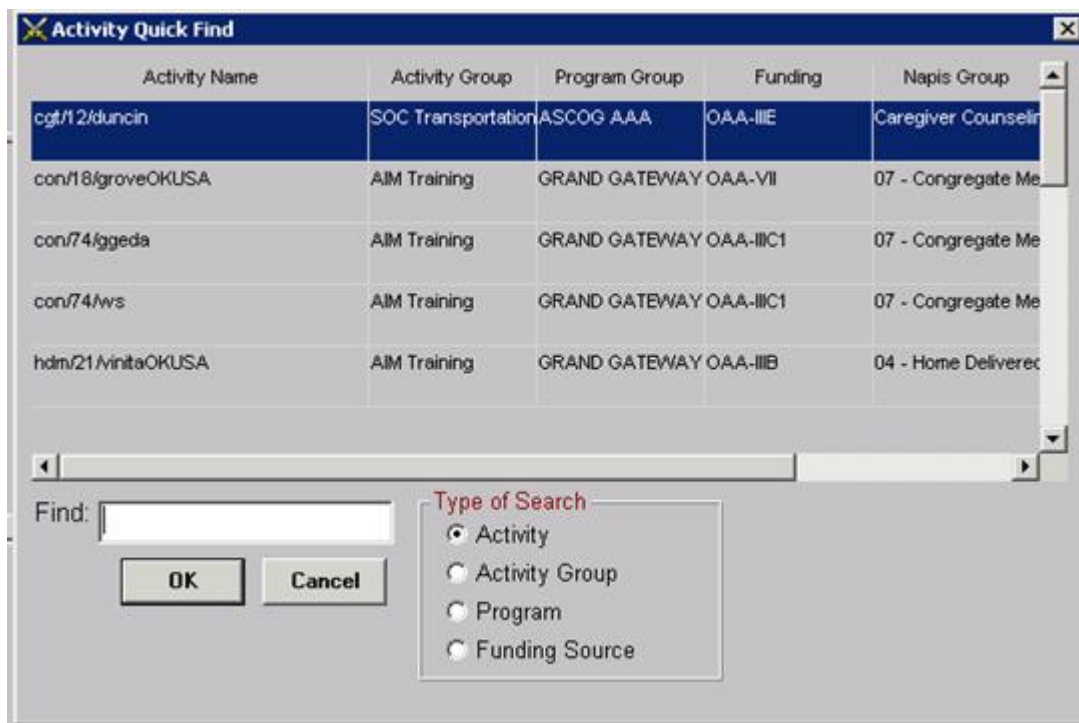
In this case **transfer** is set to Yes because it is a Title III eligible service and all of the services provided under this activity will be reported to AoA.

The box next to **NSIP** is checked because it is a Title III eligible meal all of the services provided under this activity will be reported for USDA reimbursement.

Unit Cost is used to set the scope of a service activity [Unit Cost Methods](#)

Setting Up Activities

In order to access your current list of activities first click screens and then click Activity Setup

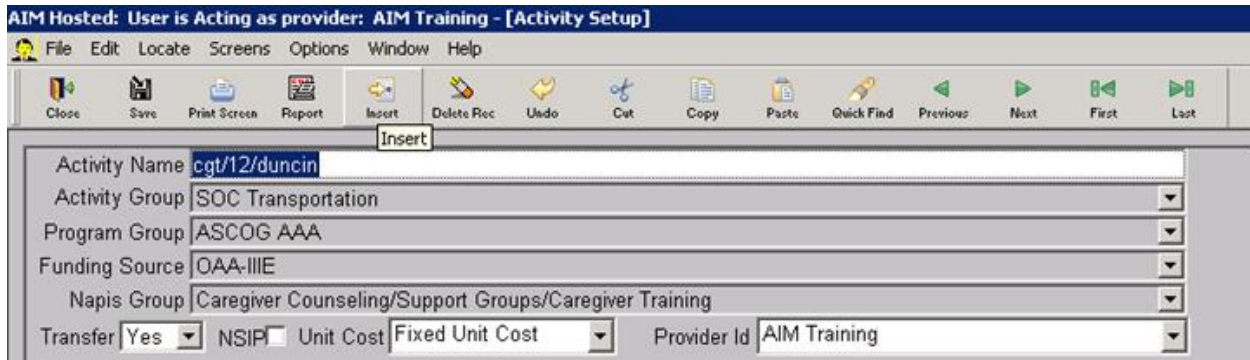


Next you will see the Activity Quick Find which is a list of the activities that are currently in your database. The first one on the list will be automatically selected (highlighted) for you.

Activity Quick Find

AIM will sort the list of activities by any of the options listed under Type of Search. You can scroll through the list using the vertical scroll bar or you can type what you are looking for in the white box next to find. Remember that when you use Find, what you type must correspond with the type of search you selected.

Click the OK button.



AIM will open an activity setup screen for the existing activity seen on the next page.

Insert a New Activity

In order to create a new activity click the Insert button in the tool bar. For new activities the activity name always starts out as New Activity.

Replace it with the name of your new activity.

Activity names

Required specific format. There are four components separated by slashes.

1. The first is a three letter code that identifies the type of service followed by a forward slash.
2. The second is a 2-digit county code (01 thru 77) followed by a forward slash.
3. The third is the site or location name of the service followed by a forward slash. The first three including the slashes are required for every activity name.
4. The fourth is an optional local description that may be added to further define the service.

Impact on Reports

There are reports in AIM that are deigned to retrieve and sort information according to this name structure.

- Missing or incorrect information or slashes will cause some reports such as the OKS738 will not function correctly.
- It is strongly recommended that you run the [OKD204](#) report which lists the activity names that are constructed incorrectly.
- One of the components of the activity name that is frequently used to sort and organize information in reports is the site name. Therefore, it is essential that a particular site name is spelled exactly the same way every time it is used in an activity name.
- For details about the required format for the activity name refer to Information

Memo 2007-AIM01C which is included in this instruction. [Activity Naming Standard, S38](#)

[Examples](#) of Activity Setup Screens

Unit Cost Methods

Designate Activities as Group or Individual Services

After you set up your activity click decide whether it is an individual or a group activity.

group services. Click Screens> Activity Setup. Open an activity you are designating as a group service.

The screenshot shows the 'AIM Hosted: User is Acting as provider: AIM Training - [Activity Setup]' window. The window has a menu bar (File, Edit, Locate, Screens, Options, Window, Help) and a toolbar with icons for Close, Save, Print Screen, Report, Insert, Delete Rec, Undo, Cut, Copy, Paste, Quick Find, Previous, Next, First, and Last. The main form contains several fields: Activity Name (adw/14/Other/Pudding Break), Activity Group (AIM Training), Program Group (AIM Training), Funding Source (Medicaid Waiver), Napis Group (ADvantage/Medicaid Waiver), Transfer (yes), NSIP (checkbox), Unit Cost (Fixed), and Provider Id (Student 15). A dropdown menu is open for the Unit Cost field, showing options: Fixed, Cost Reimbursement, Fixed, Group, and Variable. Below the form, there are labels for Start, End, Locationid, Unit Cost, and Units Budgeted.

Click the down arrow of the Unit Cost field as shown above

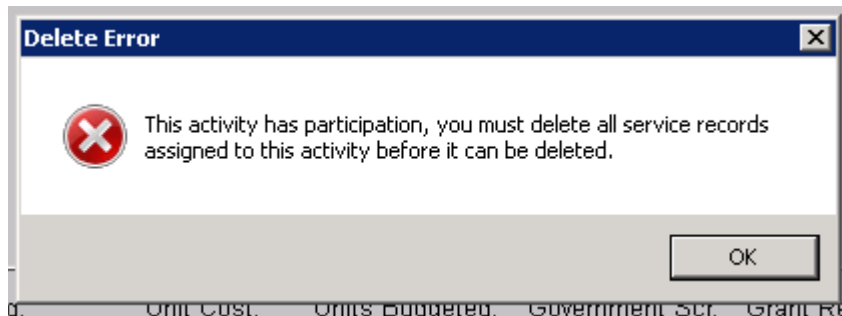
- Fixed, Cost Reimbursement and Variable are ways to set an activity as an individual service. Examples of individual services are meals, transportation, outreach, etc. See Inserting [Service By Activity](#)
- Group sets the activity as a group service. Examples of group services are training classes, seminars, support groups, etc. See Inserting [Group Service](#)

Click the desired unit cost method so that it appears in the field and click Save.

Deleting Activities

AIM will not let you delete an activity that has services connected to it. So if you accidentally insert a new activity that you do not need it is okay to delete it.

- Click the Delete button on the tool bar. AIM will give you a warning message about what you are preparing to do.
- Click Yes. If AIM permits the delete the activity will automatically disappear and AIM will display the Activity Quick Find.



If not you will see this message.

- Click OK and no action will be taken and AIM will leave you in the current activity.

Renaming Activities

If you wish to correct the information on an existing activity open the activity quick find list. Choose the activity you want to work with. You can change the Name, Activity Group, Program Group, Funding Source, NAPIS Group, Transfer status, NSIP status and Unit Cost Method. After the change click Save.

!@& CAUTION: Renaming an activity other than correcting the format is risky and **very strongly discouraged.**

- The Activity Name is the identity of the activity. When you change the activity name you change the identity of every service connected to that activity.
- There are many times that an activity name is incorrectly formatted and must be corrected. If you are unsure about formatting of a particular activity name run the [OKD204](#) report and refer to [Activity Naming Standard](#) memo.
- A very common problem is that users change an activity name and forget what they changed it from. Then later on decide they made a mistake but can't figure out which activity to return to the original name. In doing so create the illusions that some clients' services have been lost by the database.

- Other than correcting the format, when you need to reidentify an activity, instead of changing the name, create a new activity and have the existing archived. In that way you start giving clients a correctly identified service without losing track of what you have already done.
- Example: lets' say that you have recorded a congregate meal at site A for five years and site A closes. And all the participants begin eating at site M. If you change site A to site M in the activity name then all the services for the previous five years will appear to have been provided at site M.

The same CAUTION applies to the NAPIS Group.

- Example: A provider that provided nothing but chore services for five years is going to start providing nothing but homemaker services. If you change the NAPIS group on your activities from Chore to Homemaker then there will be no record of chore services ever being provided.
- Create brand new activities for Chore and archive the activities for Homemaker..

IMPORTANT LAST NOTE **

There are going to be times (just like with the activity name) that the NAPIS Group is wrong and needs to be corrected for an activity. Incorrect NAPIS Groups cause multiples of problems when reporting service information to government agencies. When it is appropriate (whether it is a wrong activity name or wrong NAPIS Group) make the corrections.

However, when in doubt about what to create a new activity.

Examples

In the example above the first three letters of the activity name are **tra** which means that this is a transportation activity. Notice that the NAPIS group corresponds with the name. Also, since transportation is not a meal there is no USDA re-imburement so the box next to NSIP is left blank. Transfer is still Yes since these Title III eligible services are reported to AoA.

The screenshot shows a software window titled "AIM Hosted: User is Acting as provider: AIM Training - [Activity Setup]". The window has a menu bar with "File", "Edit", "Locate", "Screens", "Options", "Window", and "Help". Below the menu bar is a toolbar with icons for Close, Save, Print Screen, Report, Insert, Delete Rec, Undo, Cut, Copy, Paste, Quick Find, Previous, Next, First, and Last. The main area of the window is a form with the following fields:

Activity Name	cgt/12/duncin
Activity Group	SOC Transportation
Program Group	ASCOG AAA
Funding Source	OAA-IIIIE
Napis Group	Caregiver Counseling/Support Groups/Caregiver Training
Transfer	Yes
NSIP	<input type="checkbox"/>
Unit Cost	Fixed Unit Cost
Provider Id	AIM Training

In the example below you see that the last part of the activity name is Staff Under 60. This is an example of a service that is not Title III so that the box next to NSIP is unchecked even though it is a meal. However, there are two problems. First transfer is set to No. Transfer should almost always be set to Yes. Also, the Activity Name is missing the site name which is a critical piece of information for the automated s38 report.

AIM Hosted: User is Acting as provider: AIM Training - [Activity Setup]

File Edit Locate Screens Options Window Help

Close Save Print Screen Report Insert Delete Rec Undo Cut Copy Paste Quick Find Previous Next First Last

Activity Name con/55/Nature Park Pavilion

Activity Group Training

Program Group OK State Office

Funding Source OAA-III C1

Napis Group 07 - Congregate Meals

Transfer Yes NSIP Unit Cost Fixed Unit Cost Provider Id AIM Training

Start:	End:	Authorized:	Instructor:	Locationid:	Unit Cost:	Units Budgeted:

Authorizations

AIM Hosted: User is Acting as provider: AIM Training - [Activity Setup]

File Edit Locate Screens Options Window Help

Close Save Print Screen Report Insert Delete Rec Undo Cut Copy Paste Quick Find Previous Next First Last

Activity Name tra/55/Metro Get-a-ride

Activity Group AIM Training

Program Group OK State Office

Funding Source OAA-III B

Napis Group 10 - Transportation

Transfer Yes NSIP Unit Cost Fixed Unit Cost Provider Id AIM Training

Printed Documentation

AIM Hosted: User is Acting as provider: AIM Training - [Activity Setup]

File Edit Locate Screens Options Window Help

Close Save Print Screen Report Insert Delete Rec Undo Cut Copy Paste Quick Find Previous Next First Last

Activity Name: con/55/Staff Under 60
Activity Group: AIM Training
Program Group: OK State Office
Funding Source: Local
Napis Group: Ineligible Under 60 Non-OAA
Transfer: No NSIP: Unit Cost: Fixed Unit Cost Provider Id: AIM Training

AIM Hosted: User is Acting as provider: AIM Training - [Activity Setup]

File Edit Locate Screens Options Window Help

Close Save Print Screen Report Insert Delete Rec Undo Cut Copy Paste Quick Find Previous Next First Last

Activity Name: adv/14/Other/Pudding Break
Activity Group: AIM Training
Program Group: AIM Training
Funding Source: Medicaid Waiver
Napis Group: ADvantage/Medicaid Waiver
Transfer: yes NSIP: Unit Cost: Group Provider Id: Student 15

Start: End: Authorized: Instructor: Locationid: Unit Cost: Units Budgeted: G

Client Quick find Introduction

Quick Find Basics

Click the menu item Screens then point your cursor to Client and then point your cursor to Client Info and click. AIM displays a list of the people who are in your database. The window that displays the list is called the Client Quick Find. From this list you will select the name of the client record you wish to open. Before we move on to opening a client record let's examine a few key points about the Client Quick Find list.

Display

In the illustration to the left the list displays only the clients whose statuses are active, as is denoted by the check mark in the box at the far left bottom corner of the illustration next to the caption **Show Active Clients Only**. If the box was blank the Client Quick Find would list all clients regardless of status. The clients can be sorted in the list either alphabetically by last name then first name or by Client SSN (and what the user interface calls an SSN is actually the Unique ID). Note that in the illustration a box titled **Type of Search**. Select your preferred sorting/search method by clicking the circle next to either Client Name(Last,First) or Client SSN (Unique ID).

The screenshot shows a window titled "Client Quick Find" with a table of client records. The table has columns for Client ID, Last Name, First Name, Middle Name, Status, and Date of Birth. Below the table is a search area with a "Find:" text box, "OK" and "Cancel" buttons, and a "Show Active Clients Only" checkbox. A "Type of Search" section contains two radio buttons: "Client Name(Last,First)" (selected) and "Client ID".

Client ID	Last Name	First Name	Middle Name	Status	Date of Birth
000-00-14682	Doe	Needsome	Train	Pending	2/28/1923
HIT-01-2203A	Hitchpost	Gallup	Training	Active	1/22/1903
T00-00-68835	Jones	Barbara	j	Active	1/1/1935
T00-00-37763	mills	joe		Inactive	1/1/2930
T00-00-67945	Mills	Don		Inactive	1/1/1745
T00-00-68833	Phillips	Lore	Ann	Active	12/15/1962
T00-00-20139	Smith	Joe	W.	Active	6/30/1955
T00-00-82385	test	test	test	Pending	11/11/1811

Find:

Show Active Clients Only

Type of Search

Client Name(Last,First)

Client ID

In the Client Quick Find there are two ways to look for names of clients. You can use the vertical scroll bar to the right of the quick find window or you can use one of the Find functions explained below or you can use a combination of both.

ID Search

If you decide to search by SSN (Unique ID) remember to click your mouse inside the Find box and position your cursor to the far left side before you begin entering a Unique ID. If you do not begin with the cursor against the left wall of the box, AIM may see a space at the beginning of the ID and fail to find the client you are searching for.

Name Search

A search was started in the Find box using the client's last name and first name. At the bottom of the quick find window is an explanation of how this search works. The format is last name a comma and first name with no spaces. Note the position of the cursor between the e and b.

One thing to remember about the name search is that AIM will not let you type a name that is not on the list. As you can see here when **steb** was typed the cursor did not advance, but instead went behind the **b**, because there is no name that starts with **steb** available on the list. However, AIM advances to the name that is closest to the spelling.

Also note that AIM will search for clients by last name and then first name. And as stated above the last and first name have to be separated by a comma with no space as is shown in the illustration.

Client Screen Tour

Quick Link Buttons

A brief explanation of the other **Quick Link** buttons:



Assessment takes you directly to the current client's assessment screen.

Client Activity takes you to the screen to add services for the current client.

Custom Screen is used for data fields not available elsewhere in the database.

Roster by Client displays an Activity list for you assign a client to rosters.

Waiting List displays an Activity list to select services clients are waiting for.

Authorizations is where you can manage clients who receive limited services.

Referral lets you document and manage clients referred to other agencies,

Care Needs manage a client's special needs that are not listed in the assessment tool.

Owners a list of the Providers having access to the client record you have opened.

Income Src is a general breakdown of sources of income.

Other Info and **Income Cmnt** note pads for journal entries for the current client.

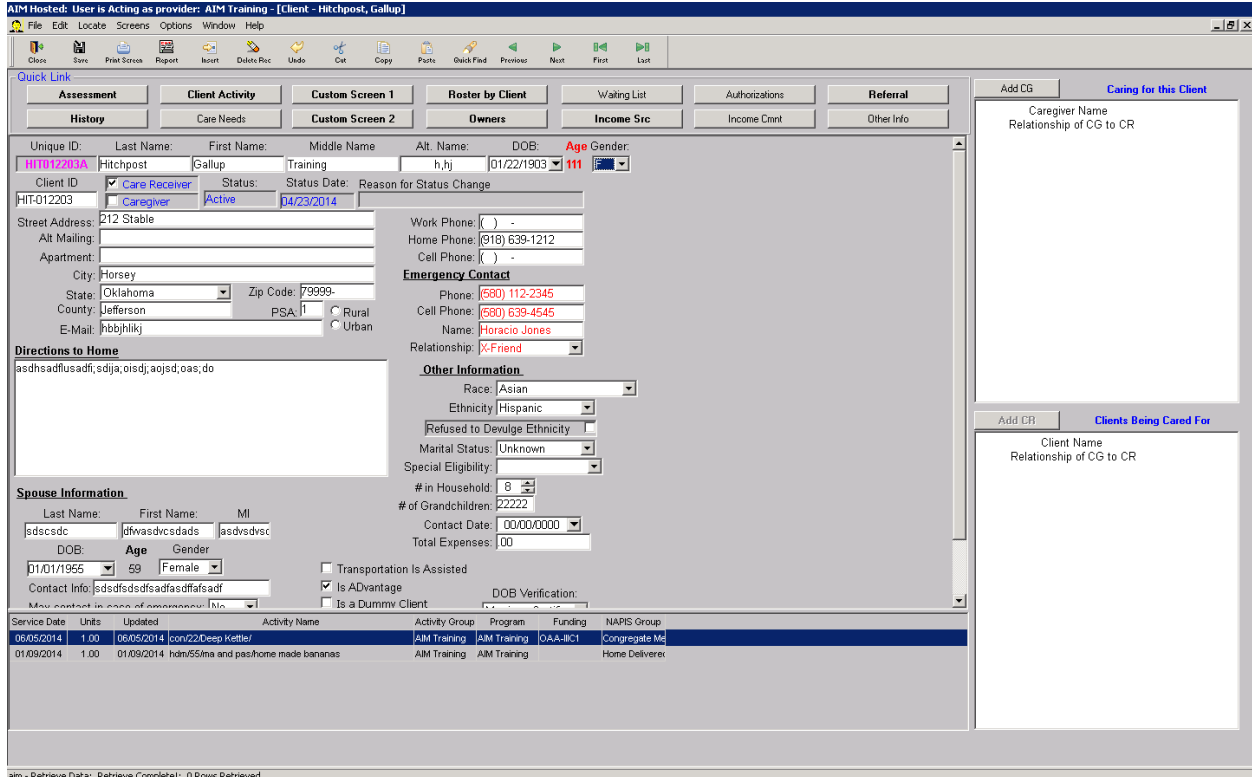
Client Information

The blue bar at the top of any screen is the title bar. According to this title bar I am logged onto AIM as AIM Training and looking at the client record for Gallup Hitchpost.

Basic rules to keep in mind about entering information into the client screen.

1. Never enter false/incorrect information.
2. Enter all of the information you have access to.
3. Enter only the information that a field calls for. Names only go into the name fields. If it is not part of the person's name, don't put it in the name field. Address information only goes into the address fields. If it is not part of the address don't put it in an address field.
4. The correct last name and correct birth date are required in order to create a brand ne client record.
5. Entering false information into a government database is a federal offense.
6. The required text format for all client information in AIM is Standard Case. See Memo [Standard Case required](#)

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Identifying Data

The Unique ID is the current client's unique identification number and is automatically assigned by the AIM program.

The Client ID is made up of the first three letters of the client name and six-digit birth date.

The first name and Alt. Name (Nick Name) are interchangeable.

Status and Status Date are changed through the Owners quick link button. [Change Status/Status Date](#)

Status Date indicates when a client's status changed.

Contact Information

Clients are contacted by mail, phone or through other personal contacts.

Most of the field labels are self explanatory.

Other Information

Be sure to select both Race and [Ethnicity](#). You now must identify clients as either Hispanic or non-Hispanic. If you check the box next to Refused To Divulge Ethnicity leave the Ethnicity field blank.

Additional Data

Case Worker/Operator are the names of people in AIM as employees

Check Boxes

- Is Dummy is there for those of you who are still using unauthorized aggregate (dummy) clients.
- Transportation and advantage are bat your discretion.

At the bottom of the client screen you **may** see a list of services the client received. This is for **display only**. You cannot delete or change information that appears on here. If you want to make changes to a client's services see [Service By Client](#).

The two white windows at the right are used for managing care giver/care receiver relationships. Unless you are a designated AAA Caregiver coordinator, disregard that part of the screen.

Custom Screens

There are variations of the client screen that are designed specifically to satisfy unique user needs such as care giver management, meal management and transportation. There is a general client screen that was also customized for all other Oklahoma Users. These screens are always evolving so that the ones you see here may not depict the actual one that you currently use.

Client Management

Insert a New Client

Most Duplicate client records occur because users create brand new client records for people who are already the database. *Avoid duplicate client records by periodically running the [SC51](#) or [OKD212](#) Reports.*

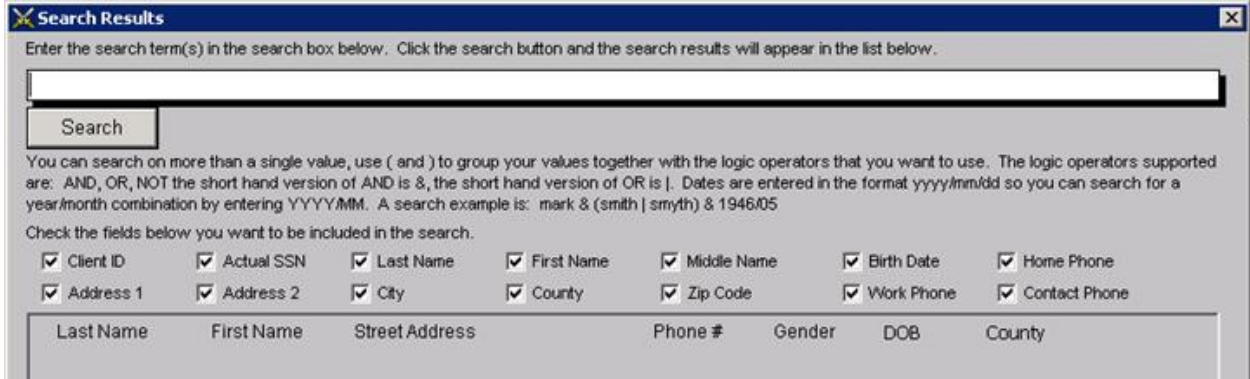
INSERTING

- First make sure you do not have the client in your Provider database by searching the client quick find.
- Creating/Inserting any type of new record begins with being in the type of record you want to create. In this case any client record must be open first.
- Click the Insert button in the tool bar.
- Before you create a new client record make sure the person you are preparing to enter is not already in the State database.

SEARCHING THE STATE DATABASE

The State database contains the names of all the clients that have ever belonged to any Provider in Oklahoma. There are instructions on the AIM screen that explain how to search for a client.

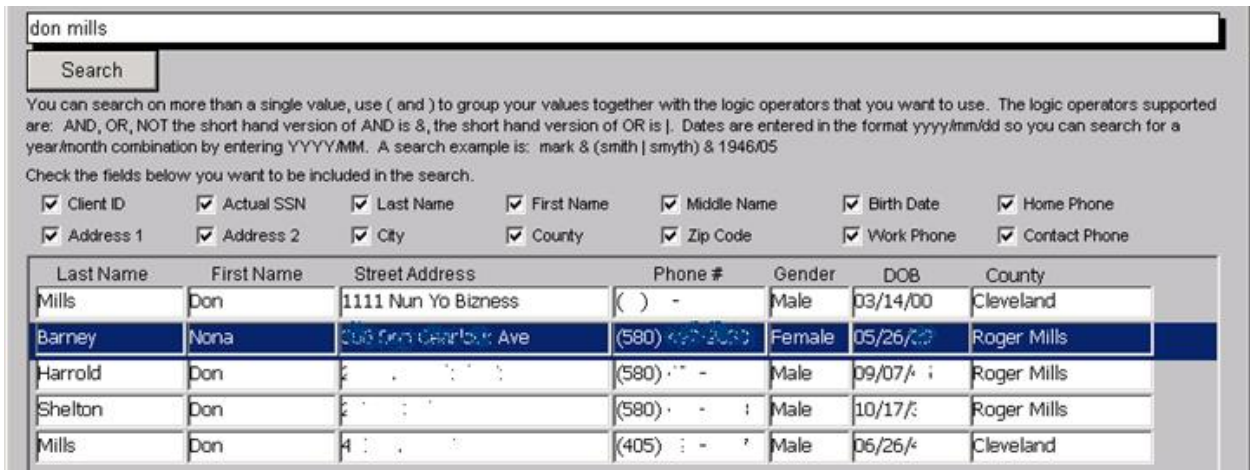
- Select your search criteria (First Name, Last Name, Birth Date, City, etc.) by clicking the appropriate check boxes. Uncheck all of the boxes for information you will not search for. Leaving boxes checked next to information not needed for your search will result in listing names you do not need to review. For example: if you are looking for someone named Craig and you leave County checked, you will get a list of everyone living in Craig county.
- Type the specific information you want AIM to search for in the top white field just above the Search button. Spelling and accuracy are critical.
- After you have correctly entered the search information and ensured the boxes are appropriately checked, click the Search button.
- One of two things will happen.



You may get nothing.

- That means there was no one to show you. AIM will not give a message saying there was nothing to display.
- If you think this is an error then double check what you typed, verify your check boxes and search again. If there is still nothing, go to the bottom of the screen and click the Generate button.
- AIM will open a new blank client screen.

Or AIM will display a list of names.



You might draw one of the following conclusions and take the appropriate action.

1. One of the people on the list is the client you are looking for. Click the row of the one you want to highlight it as shown above. Then click the Make Owner button. AIM will display that person's record for you and place the client in your database.
2. None of the people on the list are who you are looking for. Whether you have already clicked one or not, Click the Generate button. AIM will insert a new client record and display the new blank [client screen](#) for you to begin entering client information.

3. You have changed your mind about inserting a new client at this time. Click the Cancel button and AIM will return you to the last client screen you viewed.



CAUTION: A common error is to use the same search method as in the client quick find. This and the quick find have instructions on the screen of how to type in a search. Pay attention to the instructions on the screens.

Note: There are two check boxes where the type of data (labels) that do not match Oklahoma's naming convention. The box that is labeled Client ID is actually for the unique ID number that AIM automatically assigns. The box labeled Actual SSN is the client ID made up of the first 3 letters of the last name and 6-digit birth date.

Another Word of CAUTION. AIM updates the Search Program every three hours. Let's say that you Generate a new client, enter all of the person's information, save it and then accidentally delete. However, when you try to do a search in order to get it back it will not appear on the list until three hours after you save the new client. Please do not generate it again. Wait the three hours in order to avoid creating a duplicate client.

Enter new Information

Do not for any reason knowingly enter fraudulent information into the database. There are two pieces of information you **must** have in order to create a new client record – those are an **actual last name** and an **actual date of birth**.

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The screenshot shows a web form for client information. It is divided into two main sections: **Spouse Information** and **Other Information**.
Spouse Information includes fields for Last Name, First Name, MI, DOB, Age, Gender, Contact Info, and May contact in case of emergency. It also has dropdowns for Case Worker and Operator.
Other Information includes dropdowns for Race (set to White), Ethnicity, Marital Status (set to Married), Special Eligibility, # in Household, # of Grandchildren, Contact Date (set to 00/00/0000), and Total Expenses (set to .00). There are checkboxes for Transportation Is Assisted, Is ADvantage, and Is a Dummy Client. A DOB Verification dropdown is also present.
At the bottom of the Other Information section, there is a note: "For a list of Other Programs Attended click Custom Screen 2".

Fields with text color other than black (Fucia, Blue) cannot be changed by a user in the client screen.

The required text format for all client information in AIM is Standard Case. See memo [Standard Case required](#)

Take note of the default settings. A default setting is a pre-programmed value that automatically appears in a field when a brand new client screen is Inserted.

Unique ID is automatically assigned and entered by AIM.

The following defaults can be set for each user.

- Rural/Urban is defaulted to Urban in the example.
- State is set to Oklahoma
- Area codes are set to 580.
- Race is set to White.
- Marital Status is set to Married.
- Status is set to Active
- Status date is set to the current date.
- PSA is set to 1.

PSA numbers are as follows: 1-Grand gateway, 2-EODD, 3-KEDDO, 4-SODA, 5-COEDD, 6-TULSA, 7-LTCA-E, 8-AreaWide, 9-ASCOG, 10-SWODA, 11-OEDA.

Also, notice that some of the fields are pre-formatted.

- The date fields are formatted to ensure we enter dates with a 2-digit month, 2-digit day and 4-digit year. Phone has a pair of parentheses and a dash.
- Zip Code has a dash to separate a 4-number suffix.
- Total Expenses is et to a decimal.

The content of most of the fields is self-explanatory.

- You are required to enter any and all information that is provided to you about a client. The only information that is to be entered into a field is the information that belongs in that field.

Fields that are common problems:

- Date fields especially birth date are either unrealistically old or are future dates. I suggest you use the drop down calendars.
- Misspelled cities and counties and incorrect zip codes. To ensure these fields are entered correctly always use the zip code utility [City/County/Zip](#).
- Phone numbers are incomplete or incorrect.
- The Emergency Contact Relationship is often left blank.
- Ethnicity. The Administration on Aging, has been removed from Hispanic from the race list. The only way to identify a person as Hispanic is in the ethnicity field. Now, everyone we serve is identified as either Hispanic or non-Hispanic. For each client select the appropriate race and then also select the appropriate choice for ethnicity. And when clients refuse to give their ethnicity click the check box next to 'Refused to divulge ethnicity.'
- The Case Worker and Operator both come directly from the Employee part of the database. If a person's name does not appear on the list check their employee record. See [Open an Employee Record](#).
- Status and Status Date, see [Change Status/Status Date](#)

Caution: When you are inserting multiple client records ensure you click the Save button after you finish entering each client's information.

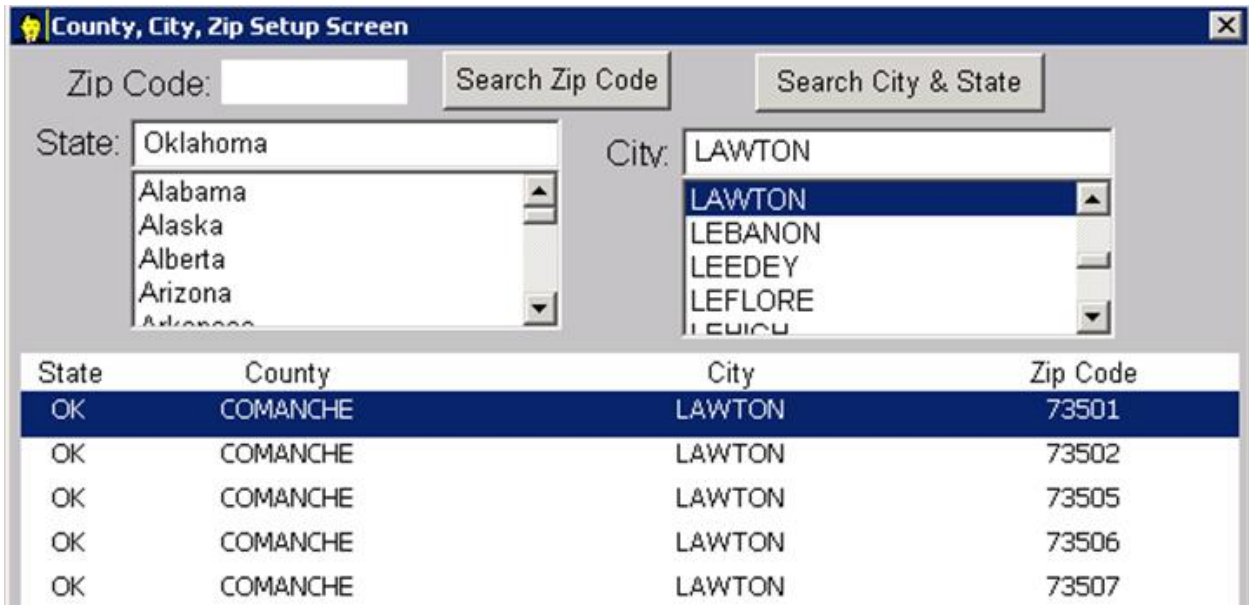
Tip: New clients are not automatically added to the client quick find list. When you are finished inserting new clients click Options>Update Quick find. The same holds true when you change a client's ID or name. The change may not be reflected on the quick find list until you use the Update Quickfind function.

City/County/Zip

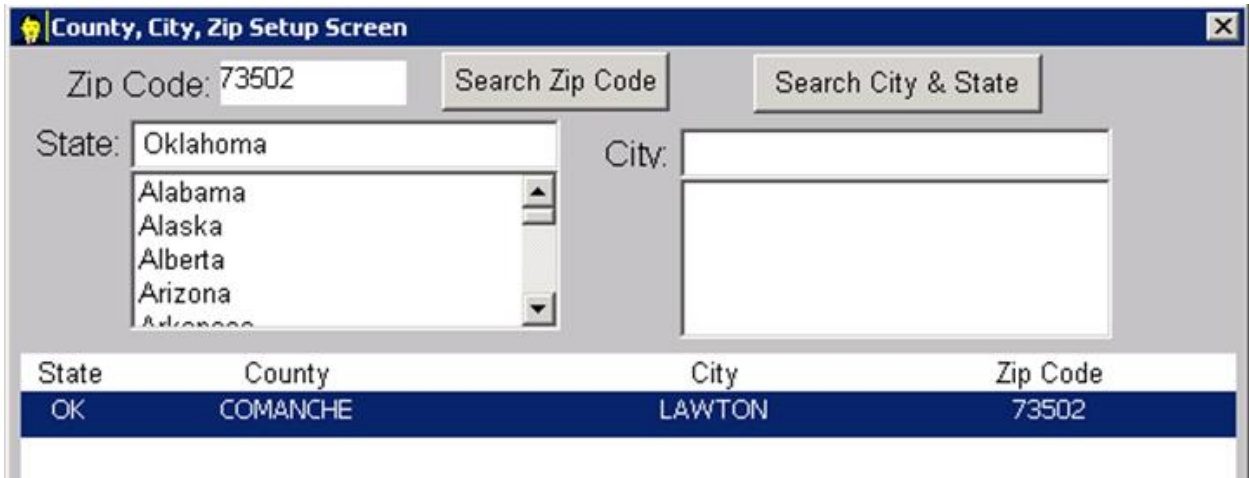
The county of residence is obtained by using an automated county search window. Open the optional screen by clicking the Zip Code field.

The county search tool can be used at any time in a client record. Start by clicking the Zip Code field. You will see a window like the one shown below.

There are two search fields – Zip Code and City & State. As you see above the state will already be selected for you.



Start a county search by city by typing the name of an Oklahoma city in the field next to City: the database will locate the city as you type. You can either type the city name completely or type it partially and click the correct one on the list. Click the button labeled Search City & State. As shown below, AIM will list the county and all of the different zip codes for a city. Click the line with the right zip code and then click the button named Return Selected. AIM will automatically enter the correct county, city and zip code.



Start a county search by zip code by typing the client's correct zip code in the zip code field. Click the button labeled Search Zip Code. As shown below, AIM will provide the county and city which should already be highlighted in blue. Click the button named Return Selected. AIM will automatically enter the correct county, city and zip code.



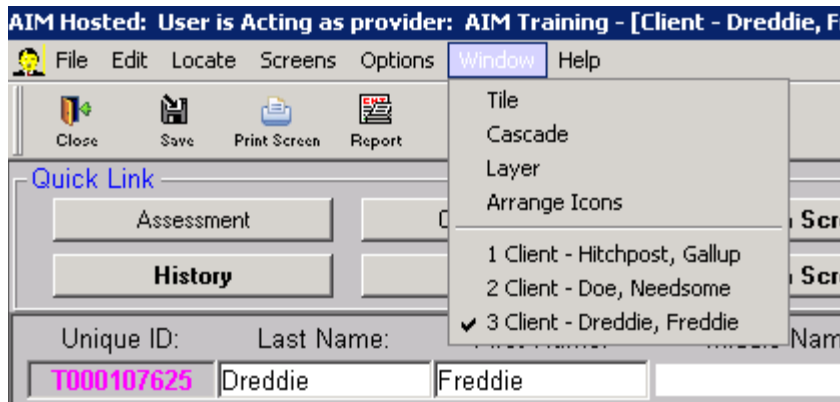
Aggregate Clients

Authorized -- AGGSTATEOK and S38(Provider ID)

Existing Clients

Updating Client Information

- All the rules for entering new information applies to updating client information. See [Client Information](#) and [Enter new Information](#)
- Use the client quick find list to locate the record you wish to update and open it. For client quick find see [Quick Find Basics](#)
- The information in any field in the client record can be changed except the Unique ID Number.
- Most fields that you select in a client record will start with the entire field of information highlighted. Use the right arrow key on the keyboard to remove the highlighting. Some fields may not allow you to change one character at a time. That is when your cursor hits the field the entire string of information is completely highlighted and will be erased with the first character key you press. If you accidentally delete information in a field, use the Undo Button in the tool bar to restore the information.
- Status and Status Date, see [Change Status/Status Date](#)
- When you finish your changes press the Save button. If after you make changes and click Save you want to review what was on the screen prior to your changes, Click the History Button. [Analyzing Histories](#)
- If you have other records to update click the quick find button in the tool bar. This option can be used only when a client record is open. If you are looking for a different record while one is already open, this is the preferred method. It opens the record you select and closes the record you just finished with.
- You can also use (Screens>Client>Client Info) while a record is already open. However, unlike using the Quick Find button in the tool bar (where the new record is opened and the previous record closed) – both records will be open at the same time. AIM will allow you to simultaneously open as many client records as you wish.



Notice that in the illustration above when you click the Window menu item AIM shows a list of all the windows you have open.

However, with too many records open at the same time, it is easy to lose track of changes and you risk forgetting to save your changes. When you click save while more than one record is open you will only be saving the changes in the active record (the record you are currently looking at).

Important Tip: When you make changes to a client record then move to the next record without closing you must click Save to keep the changes.

Deleting and Restoring Clients

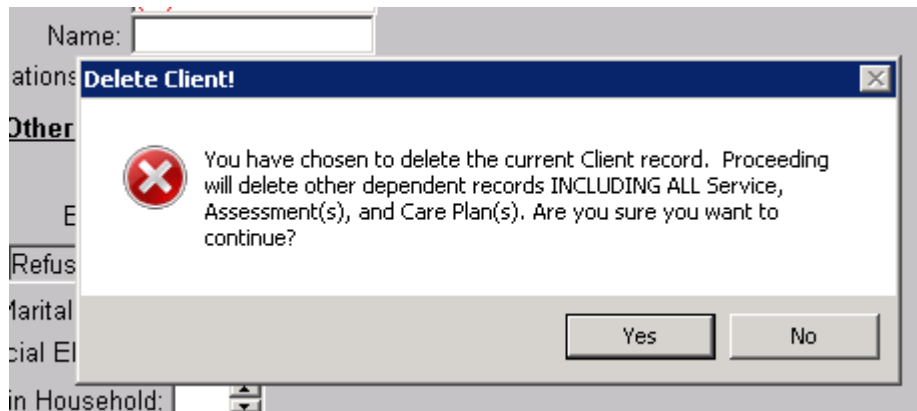
Delete and Restore

Myth: If I delete a client record from my database it gets deleted from everyone else too.

Truth: Deleting a client record only affects the provider deleting it.

Client records are stored by AIM in such a way that no user has the capability to permanently delete or remove a client from the data system except during the Merge Process which can only be performed by select users.

When you are in the client record you want to delete, click the Delete Record button in the tool bar.



You will first receive the Delete Client message. This message applies only to the Provider that the user is logged as at the time. When you are in AIM look at the blue bar at the top of the screen. It says Acting as Provider and then gives the name of your provider. For instance, if you are entering information for Pa's Chili Castle your's will say Acting as Provider Pa's Chili Castle. So that when you delete a client record, that client and everything about that client (services, assessments, etc) will be removed from the Pa's Chili Castle database which is only one of many databases in the AIM system. If you change your mind about deleting you may click No and no further deleting action will take place.

Note: Caregiver/Care receiver relationships will also remain in the system. If you are deleting someone who was a caregiver you may want to remove the relationship before you delete the record.

When you click Yes in the Delete Client message box you will see the message that the deletion is complete. Click OK you will returned to the client quick find.

If you decide to restore a client you deleted, refer to [Insert a New Client](#).

Note: Deleting a client record does not rid you of incorrectly entered services. For instance, if you enter a service for a client that was not supposed to get it, the only way to remove the service is by deleting in the service screen. Deleting the client instead of the service will leave the incorrect service in the database.

Deleting clients and the impact on reports

There are several reports that provide numbers of units. Some of them only report on the service units for clients that are currently owned by a Provider. Others report all service units entered by a Provider whether a client is currently owned or not. For example, if Joe Smith received 5 meals in January and then was deleted by the provider in February, those five meals will still be reported by the S38 because the S38 (OKS38) does not look at what clients you currently owned, but only the number of service units you provided. The OKS709 on the other hand first looks at the clients you currently own and then counts the number of services those particular people received. This anomaly is discussed again in the reports section.

Client History

Analyzing Histories

A common problem encountered by Project offices is that the information in a client screen is changed incorrectly and because there are so many people who can have access to a client's information there is often no way to determine who made the change. AIM provides a History Button in the second row of buttons on the left edge.

The screenshot shows the AIM software interface. The title bar reads "AIM Hosted: User is Acting as provider: AIM Training - [History - ,]". The menu bar includes File, Edit, Locate, Screens, Options, Window, and Help. The toolbar contains icons for Close, Save, Print Screen, Report, Insert, Delete Rec, Undo, Cut, Copy, Paste, Quick Find, Previous, Next, First, and Last. The main window is divided into two sections: "List of Revisions by date" and "Data before Current Revision".

Modified Date	Action Taken	Provider (Acting As)	Modified By User ID
8/20/2010 14:22:03	updated	AIM Training	AIMINST1
8/20/2010 14:21:48	updated	AIM Training	AIMINST1
8/20/2010 13:55:37	updated	AIM Training	AIMINST1
8/20/2010 13:54:04	updated	AIM Training	AIMINST1
8/20/2010 13:52:33	updated	AIM Training	AIMINST1
8/20/2010 13:52:16	updated	AIM Training	AIMINST1
8/20/2010 13:50:34	updated	AIM Training	AIMINST1
8/20/2010 13:50:33	updated	AIM Training	AIMINST1

The "Data before Current Revision" panel displays the following information:

- Ssn: 000001468:
- Actual Ssn: Doe022800
- Last Name: Doe
- First Name: Needsome
- Middle Name: Train
- Address1: One Buck Ln
- Address2:

Click the History button and AIM displays a page showing the dates changes were made to a client record and the user that made the change.

A single click on each line will display the information saved at that date and time. To check what the information was changed from, click the previous date in the list. The History screen was added to AIM in July of 2010 so any changes made prior to that will not be listed.

Managing Caregivers/Care Receivers

Relationship Process

First, note that in the screen below the caregiver/care receiver management windows are to the right of the client screen.

- The top window on the right is for the current client's caregiver. The button used to select the caregiver from the list is at the upper left corner of the window and is called AddCG. Click that button to see the list of caregivers.

The screenshot shows a software interface with a main client information area on the left and two management windows on the right. The main area includes tabs for 'Waiting List', 'Authorizations', 'Referral', 'Income Src', 'Income Cmmt', and 'Other Info'. Below these are fields for 'Status Date' (02/03/2009), 'Client ID' (DOE-022823), and checkboxes for 'CareReceiver' and 'Care Giver'. The right side features two windows: the top one is titled 'Caring for this Client' and has an 'Add CG' button; the bottom one is titled 'Clients Being Cared For' and has an 'Add CR' button. The bottom window shows a list with 'Hitchpost, Gallup' selected and a dropdown menu set to 'Son/Son-in-Law'.

- The lower window on the right is for the current client's care receiver. Click the button named AddCR to select a care receiver from the list.
- As shown above, Gallup Hitchpost is receiving care from Needsome Doe.

Set the Relationship

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- Once a caregiver or care receiver is selected, use the drop down arrow in the same window to select the relationship.
- When the relationship is no longer required, click the X to delete it.
- Be sure to click the save button after changes before going on to the next client screen.
- There is no need to have the name of the caregiver and the care receiver to be displayed on the right at the same time. Once you create a relationship from either the care giver or care receiver then the window to the right will show the correct information in either client record. Note above that Needsome Doe is shown as the care giver for Gallup Hitchpost.

Use reports: [OKC107](#), [OKC138](#), [OKC144](#) to manage the relationships.

Assign clients to Rosters

Rosters

A roster is a list of clients with a type of service in common, or location of a service. For instance a list of people who attend a particular support group would be a roster. Or a list of people who eat a a particular meal site would be a roster. You can build a roster (or list of names) for any service activity you have stored in AIM. Then once a roster is built there are reports you can run that display the names on a particular roster. The AIM database system has to be told which clients belong on what rosters. Adding a client to an activity roster or removing a client from an activity roster is very easy. If you make a mistake while doing it, it is very easy to fix.

Rosters are built and maintained using two methods. [Build a Roster](#) [Add to a Roster](#)

Examples of roster reports are Activity Rosters used to count how many services a client received. Sign-in rosters. And mailing labels.

[OKC100](#), [OKC101](#), [OKS700](#)

Roster reports are available in several different formats both landscape and portrait, and can provide additional information such as medicaid numbers, birth dates, ID Numbers, diet information and disabilities.

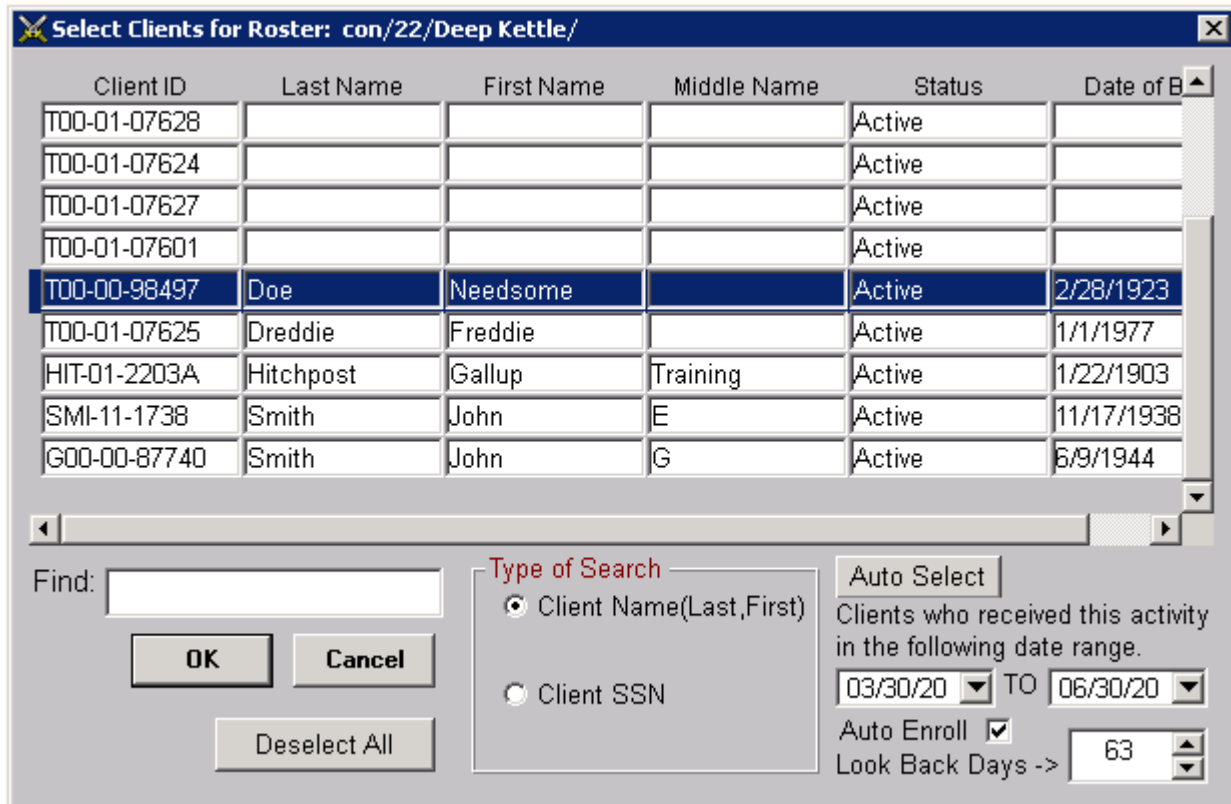
Build a Roster

Click Screens>Roster by Activity.

You will see a list of the Activities in your database. Select one Activity that you want to make into a roster and click OK.



Next is a list of the clients in your database.



Manual Enroll

- Click on to highlight each name that belongs on that roster.
- If you select a wrong client simply click the name to un-highlight it.
- When you are finished with your selections click OK.
- Clients will stay on the roster until you remove them.

Date Enroll

- Click the check box next to Auto Enroll.
- Enter a date range for auto selection.
- Click the Auto Select button.
- AIM uses the dates you enter to find the clients who received that particular service during the time that you entered.
- If the date range is too small, new clients may be excluded.
- If the date range is too wide, inactive clients could remain.
- This method requires recurring management.
- The Auto Select occurs only when you click the button.
- When you are finished with your selections click OK.

Auto Enroll

- AIM looks back a certain number of days to find who has received this service during that period of time.
- Click the box to the left of Auto Enroll
- Set the look back days to the amount of time you want AIM to search for services
- Click the Auto Select Button
- Click OK

Un-enroll

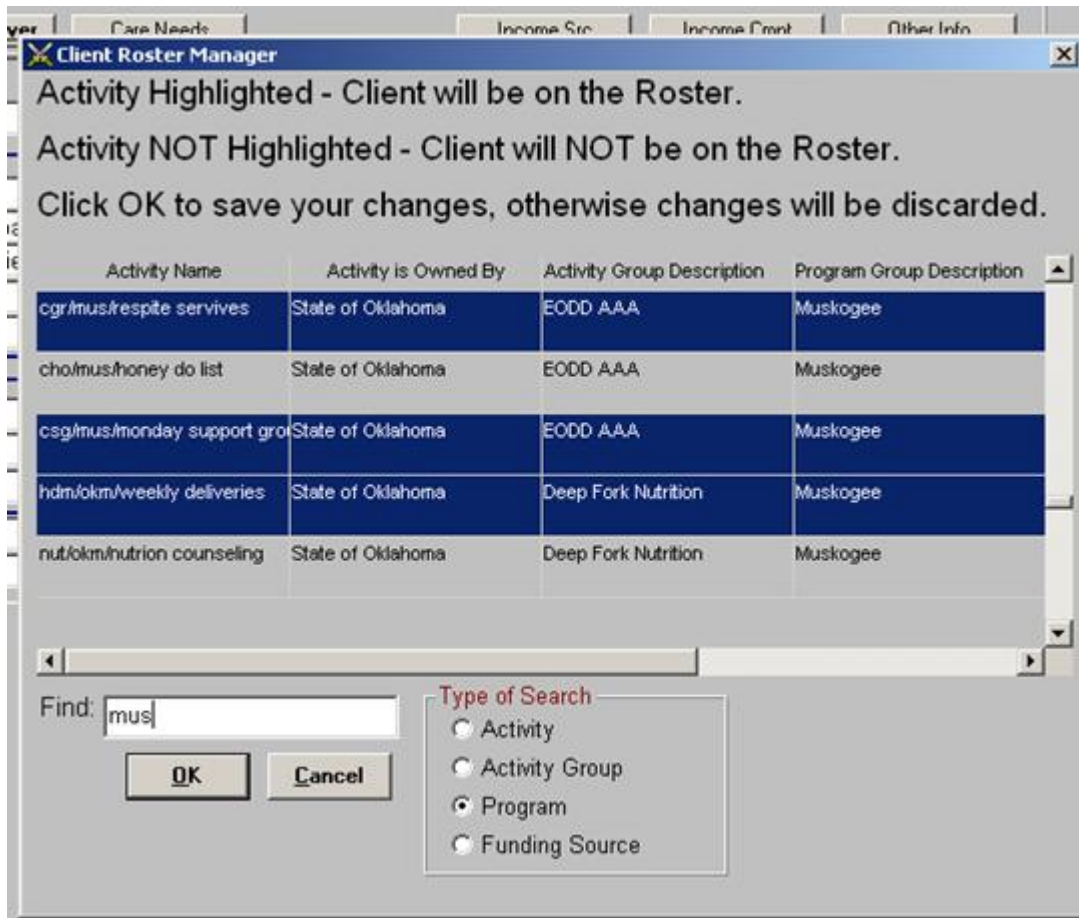
- Click a highlighted name to remove the highlight.
- Or Change the auto enroll dates and click the Auto Select Button.
- Or Click the Deselect All button.
- When you are finished making changes click OK.

To add an individual to more than one roster see [Add to a Roster](#)

Add to a Roster

Open the record of the client you want to add to one or more rosters.

Click the Roster by Client quick link button.



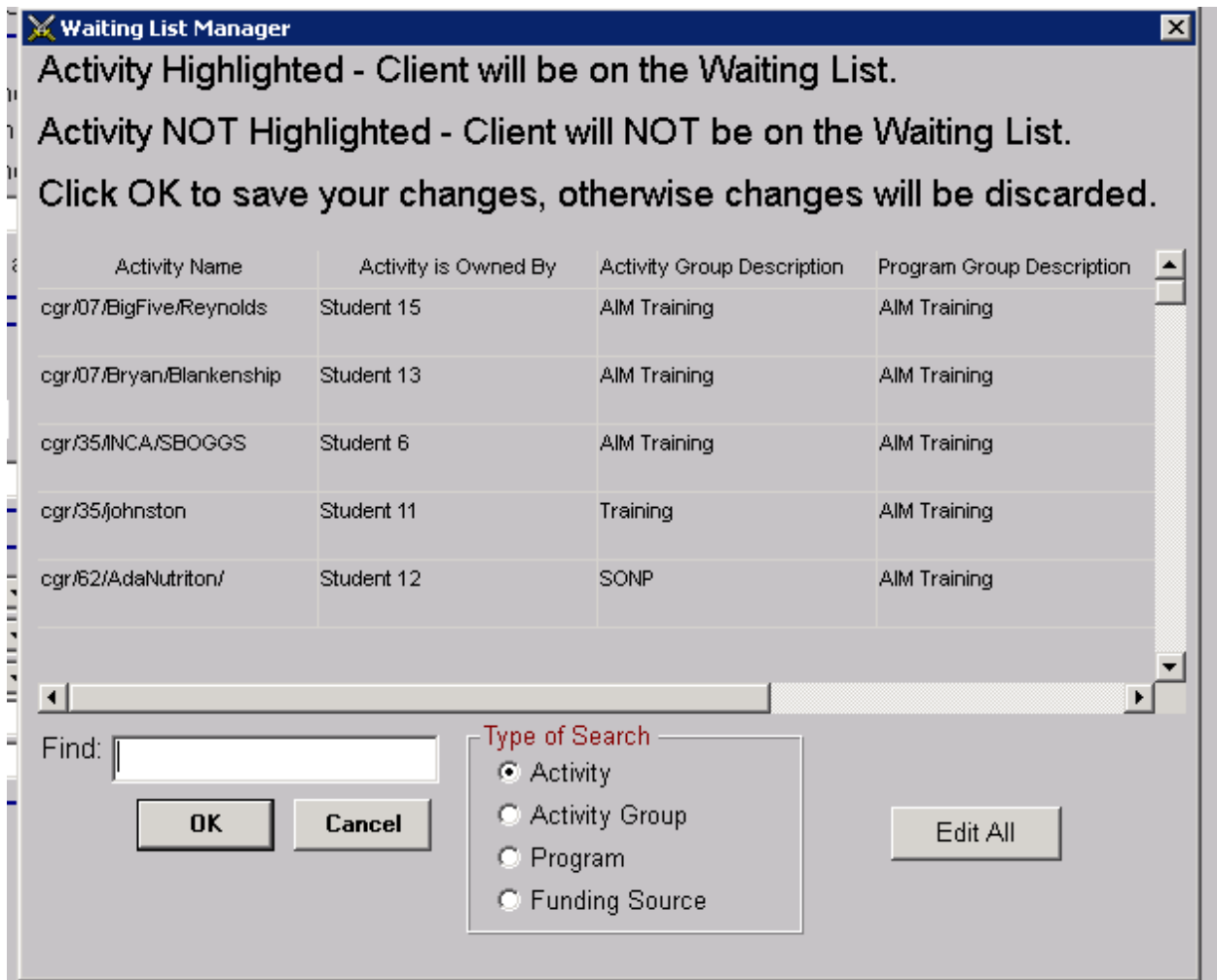
- The lines that are highlighted are the rosters that the client is currently a member of.
- Remove the client from a roster by clicking the activity to remove the highlight.
- Add the client to a roster by clicking on an non selected activity to highlight it.
- When you are finished with your changes, click OK.
- Pay close attention to the third instruction at the top. It means that if you make a change and then close the window by clicking the X instead of clicking OK, everything will be the way it was before you opened the window.

Add Clients to a Waiting List

Add and Remove

Waiting lists are used to manage clients who want services that are scheduled to be available. For instance there may be a meal site scheduled to open or a transportation route scheduled to begin. Or clients may be waiting for respite assistance while there is no money available.

To place a client on a waiting list open a client record for the person waiting for a service and click the Waiting List button.



Find the Activity that the client is waiting to receive and click it with your mouse so that the entire line highlights. Click OK.

When the service becomes available to the client, click the Waiting List button.

Select the service activity being waited for and click it to remove the highlight and click OK.

Manage the Waiting Lists



Activity #	Activity Name	Added	Removed	Priority	Reason
990000	csg/mus/monday support group	6/1/2006	6/15/2006		Manually removed by ADMIN
990000	csg/mus/monday support group	6/15/2006	6/15/2006		Manually removed by ADMIN
990002	cgr/mus/respice servives	6/1/2006	6/15/2006		Manually removed by ADMIN
990002	cgr/mus/respice servives	6/15/2006			
990003	nut/okm/nutrition counseling	6/1/2006	6/15/2006		Manually removed by ADMIN
990003	nut/okm/nutrition counseling	6/15/2006	6/15/2006		Manually removed by ADMIN
990004	cho/mus/honey do list	6/15/2006			

After you place a client on a waiting list you may review the waiting list history.

- Click the Waiting List button and then click the Edit All button.
- AIM keeps track of how long someone remains on a waiting list and when and why he/she was removed.
- Reason is blank for activities where a waiting list is still open.
- The default reason that AIM adds is the User ID of acting user. You are able to edit the removed reason with what ever information you desire.
- You can also assign a priority in this screen.

At the far left edge is a column of eraser icons.

- If there is an entry in the edit screen you do not wish to keep, click the appropriate eraser. It will immediately disappear.
- When you are sure of your decision, click the Save Button.
- Unless you click the Save button the entries you erased will return when you reopen the edit screen.
- Whenever you click an eraser, you will notice a question mark (?) at the bottom left corner of the screen. After the Save button is clicked the question mark will be replaced by the following message: aim – Update Data: Update Complete!
- To return to the client screen, click the Close button.
- Any waiting status you delete will not appear on the report.

There are two reports you can run that display the status of your clients currently on waiting lists. [OKC118](#), [OKC119](#)

Owners Button Purpose

Owners Button

When using a database that is shared by multiple providers it is important to know who you are sharing particular clients with. It is also important for different providers to be able to keep a different status and status date on clients.

Click the Owners quick link button to view all the owners of a client and to change the status and status date.

Notice now that there are two providers on the list. This is important information to know because when there are disputes about information in a client record or about the way information is displayed, the dispute can be handled between the providers without getting the AAA or state office involved.

Change the Status and Status Date

The list below are the agencies that are tied to this client.

Client Status	Status Date	Provider Name	Phone #
Active	00/00/0000	AIM Training	(405) 522-45
Active	00/00/0000	Student 3	() -

Close Save Close

You can only change the Status and Status Date for yourself (the Provider you are logged on as).

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- Click the down arrow next to the status you are changing.
- Select the correct status from the list
- Click the arrow next to the status date and select the correct date from the drop down calendar.
- When you make a change you must click the 'Save Close' button in order for the changes to take effect.
- When AIM returns to the client screen you will not immediately see the new status and status date. You will have to wait until the record is closed and reopened to see the change in the client screen.

For a list of clients with multiple owners run the [OKC121](#)

Funds Source and Comment Screens

Personal Income

The income source allows you to enter some information about a client's finances. Amounts are automatically tallied in the Total Income field. The amount in Total Income can be changed only by adjusting the amounts through the Income Source window.

The Income Comment and Other Info buttons are linked to document screens where you can store journal information. Remember that if you are sharing a client with other providers there may be multiple people posting information in the comment documents. Be courteous.

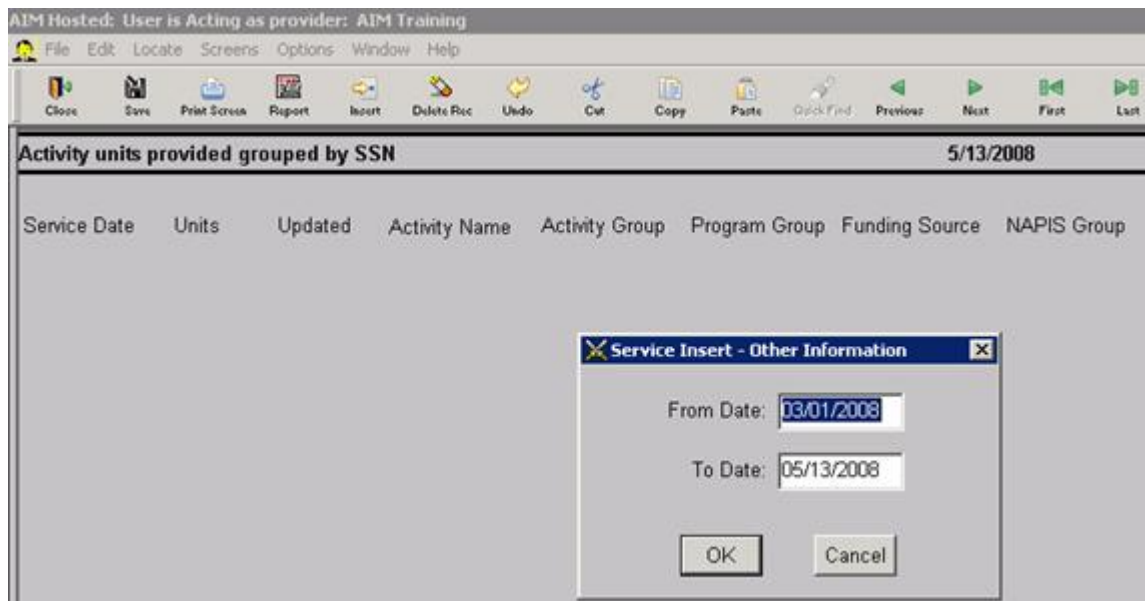
Service Management

Update or Delete a Service

Existing services often need to be updated by changing the number of units or service date. And sometimes a service needs to be deleted.

- To access a client's existing services, open a client's screen.
- Click the Client Activity quick link button.

(If you opened this screen for the purpose of entering new service, click Cancel then click Yes.)



- In the Other Information window enter the date range of the service you need to update or delete.

For example, if the services you are looking for are between January and June 2008 the From Date would be 01/01/2008 and the To Date would be 06/30/2008.

(These dates entered here have no connection to the inserting of new services.)

- Click OK.
- If there were services entered during that time you will see a display something like this.

AIM Hosted: User is Acting as provider: AIM Training - [Activity - con/74/ggeda]

File Edit Locate Screens Options Window Help

Close Save Print Screen Report Insert Delete Rec Undo Cut Copy Paste Quick Find Previous Next First Last

Activity units provided grouped by SSN 5/13/2008

Service Date	Units	Updated	Activity Name	Activity Group	Program Group	Funding Source	NAPIS Group
03/01/2008	1.00	05/13/2008	con/74/ggeda	AIM Training	GRAND GATEWAY AAA	OAA-III C1	07 - Congregate Meals
05/13/2008	1.00	05/13/2008	tra/55/Metro Get-a-ride	AIM Training	OK State Office	OAA-III B	Ineligible Under 60 Non-OAA
05/13/2008	1.00	05/13/2008	hdm/21/vinitaOK	AIM Training	GRAND GATEWAY AAA	OAA-III B	04 - Home Delivered Meals

Total units provided to: DOE-02-2800 3

- From here you may change either a service or the number of units of service.
- Do not change the number of units to zero. If the units need to be zero, then delete the record.
- Place your cursor in either the date or units field of the service record to delete then click the delete Rec button in the tool bar. If you receive a warning click to accept (either Yes or OK).
- After you make changes click Save.
- If there are other services to change in a different date range, click Close to return to the client screen, click the Client Activity quick link button and repeat the process.



If the client does not have service within the specified date range (*or if you clicked Cancel*) you will see this question. It is telling you that there are no services to show and is asking whether you want to add more services to this client's record.

- If you click No, AIM will return you the client screen. If you click Yes AIM will advance you to a service insert screen.
- If you need to continue looking for services to change in a different date range, click No to return to the client screen, click the Client Activity quick link button and repeat the process.

Five Ways to Enter

1. Through an individual client record. [Service By Client](#)
2. By clicking Screens>Client>Service. [Service By Activity](#)
3. By clicking Screens>Roster Service entry. [Service By Roster](#)
4. Through a barcode scanner. [Service By Scanner](#)
5. By clicking Screens>Group Service. [Group Service](#)

Note: In AIM the words Service and Activity are often used interchangeably.

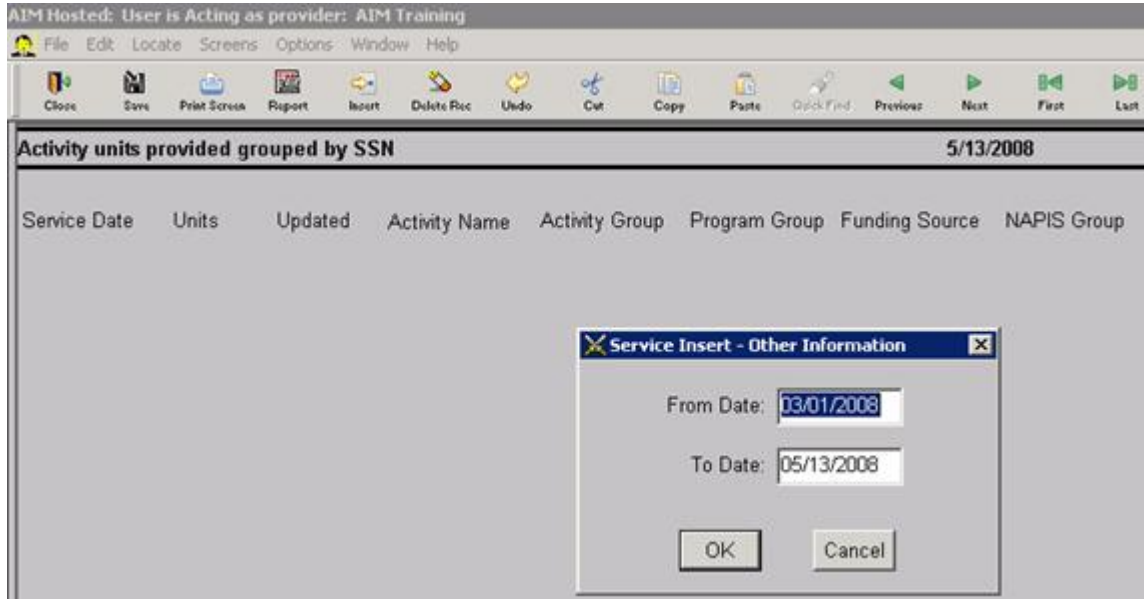
In each type of service entry AIM offers a query option to see a service history for a particular date range that the user may enter.

Service By Client

When entering services through the client record, you must first open the client record of the client that received the service. This is the method you might choose when a client is receiving a number of different types of services.

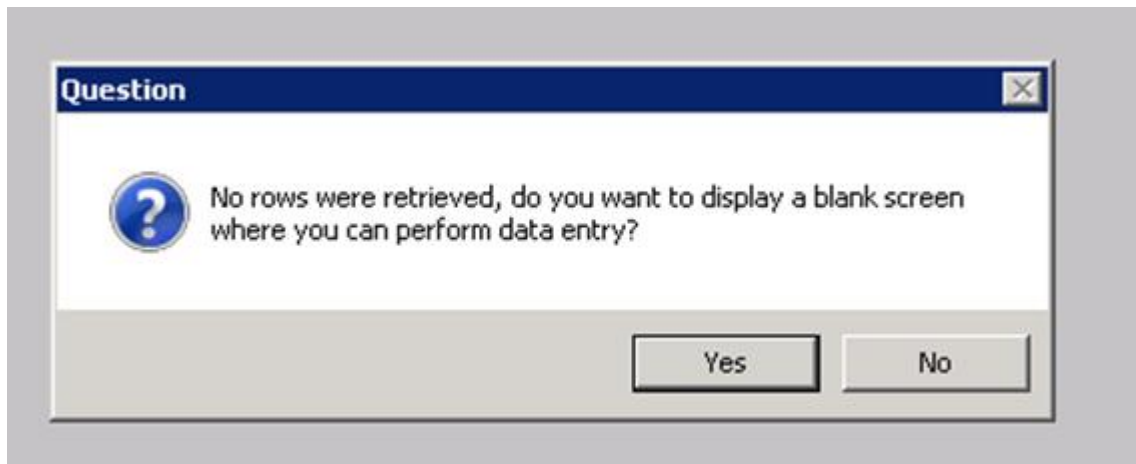
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Click the Client Activity quick link button.



Click Cancel.

(For instructions on searching for services see [Update or Delete a Service](#))



If you click No, AIM will return you the client screen. So, in order to insert a service you must click Yes.

AIM displays a blank service insert screen. Click the Insert button. Next you will see a list of your activities.

AIM Hosted: User is Acting as provider: AIM Training

File Edit Locate Screens Options Window Help

Close Save Print Screen Report Insert Delete Rec Undo Cut Copy Paste Quick Find Previous Next First Last

Activity units provided grouped by SSN 5/13/2008

Service Date	Units	Updated	Activity Name	Activity Group	Program Group	Funding Source	NAPIS Group
			cgt/12/duncin	SOC Transportation	ASCOG AAA	OAA-III E	Caregiver Counselor
			con/18/groveOKUSA	AIM Training	GRAND GATEWAY	OAA-VII	07 - Congregate Me
			con/74/ggeda	AIM Training	GRAND GATEWAY	OAA-III C1	07 - Congregate Me
			con/74/ws	AIM Training	GRAND GATEWAY	OAA-III C1	07 - Congregate Me
			hdm/21/vinitaOKUSA	AIM Training	GRAND GATEWAY	OAA-III B	04 - Home Delivered

Activity Quick Find

Activity Name	Activity Group	Program Group	Funding	Napis Group
cgt/12/duncin	SOC Transportation	ASCOG AAA	OAA-III E	Caregiver Counselor
con/18/groveOKUSA	AIM Training	GRAND GATEWAY	OAA-VII	07 - Congregate Me
con/74/ggeda	AIM Training	GRAND GATEWAY	OAA-III C1	07 - Congregate Me
con/74/ws	AIM Training	GRAND GATEWAY	OAA-III C1	07 - Congregate Me
hdm/21/vinitaOKUSA	AIM Training	GRAND GATEWAY	OAA-III B	04 - Home Delivered

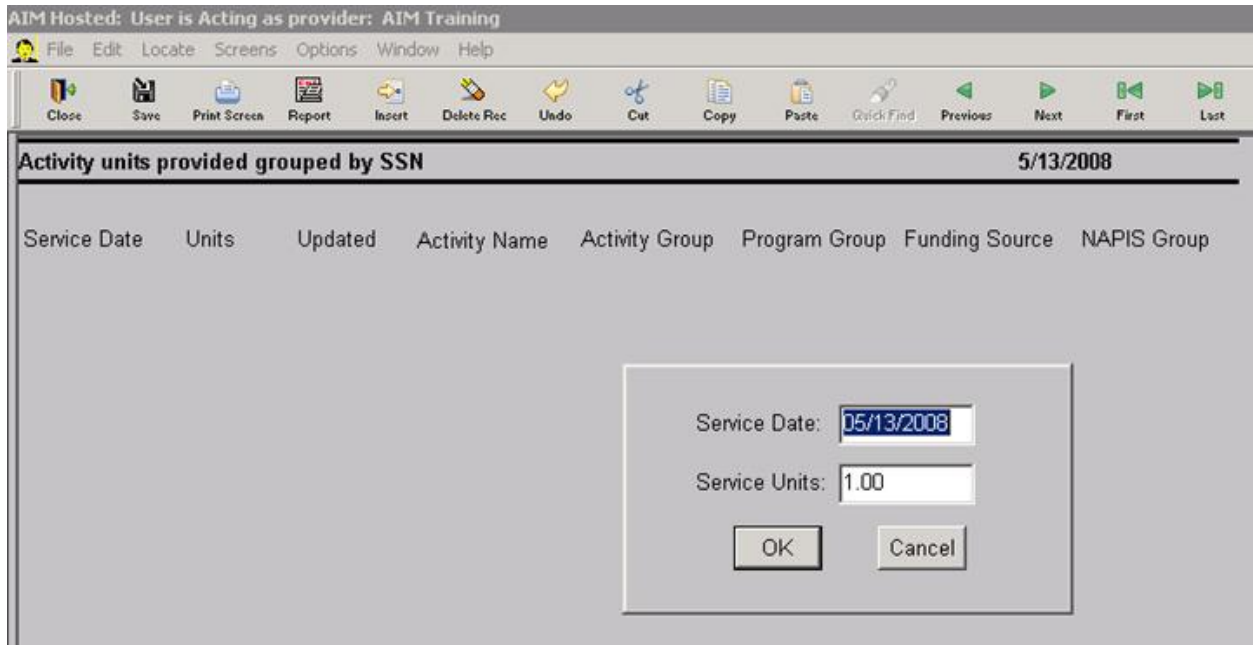
Find:

OK Cancel

Type of Search

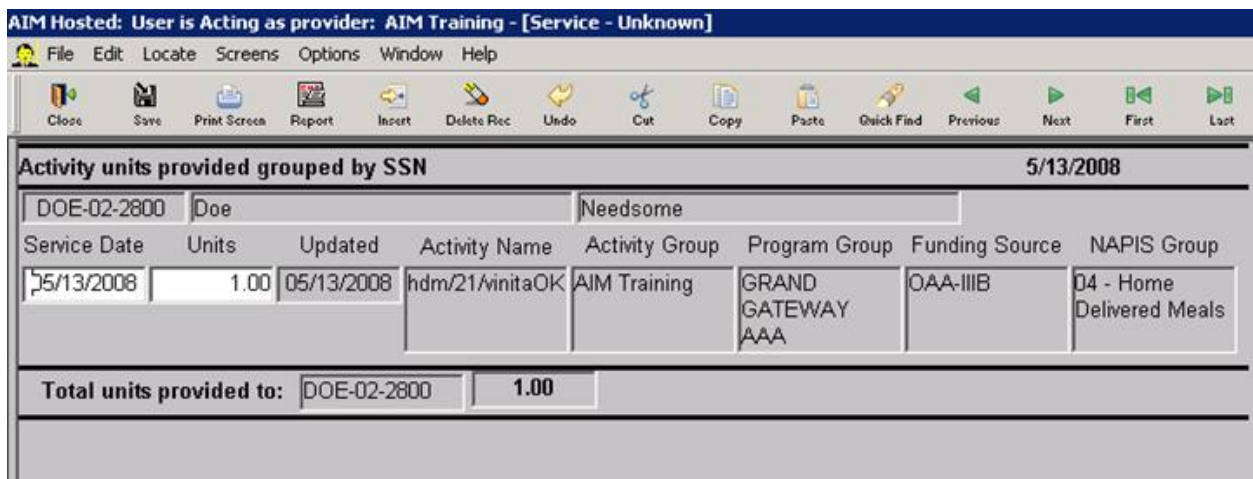
- Activity
- Activity Group
- Program
- Funding Source

Select the activity for the service you will add to the client's record and click OK.
 Note: As you click on an activity to make a selection, one block may be black instead of blue. The different colors do not affect the operation. You can only select one activity at a time. If you click more than one only the activity that has the entire line shaded is the one that the AIM system recognizes as selected.



Next AIM displays a Service Date and Service Units window. Service date is the date that the service was received. The default date for Service Date is always the current date. However, you may change it to whatever you wish. Service Units is the total number of a services received on or by a date. The default number is always 1. It too can be changed at this time. When you are satisfied that the information for date and units is correct, click OK.

Note: Projects enter services daily, weekly and monthly. For specific information about the service dates you should be using see your Project Directors. Likewise service units can be entered as daily totals, weekly totals or monthly totals. See your Project Directors about the method you will follow.



Next AIM displays information about the service you just entered. The top line is client ID, last name and first name. The next line shows the service date and units. Notice

the fields that are white. This information can be changed/edited at any time while in this window. The Updated Date will always be the date the units or service date were changed. The next five fields the information appears as it does in the activity setup screen. The bottom line displays the number of units currently on the screen. It does not reflect the total number of services a client has received.

Note: It is a good idea to periodically check this information as you enter data to verify it is correct.

Clients often receive different types of services which are all entered at the same time. If there are additional services to enter for the same client click the Insert button in the tool bar again. Find the next activity and click it and click OK. Make the appropriate adjustments in service date and service units and click OK. AIM will add a line to the display for each service you enter. Continue until all services for that client are enter then click Save and click Close.

You will notice that the service information at the bottom of the client screen will display the services you entered with the newest service dates at the top. See [Client Information](#)

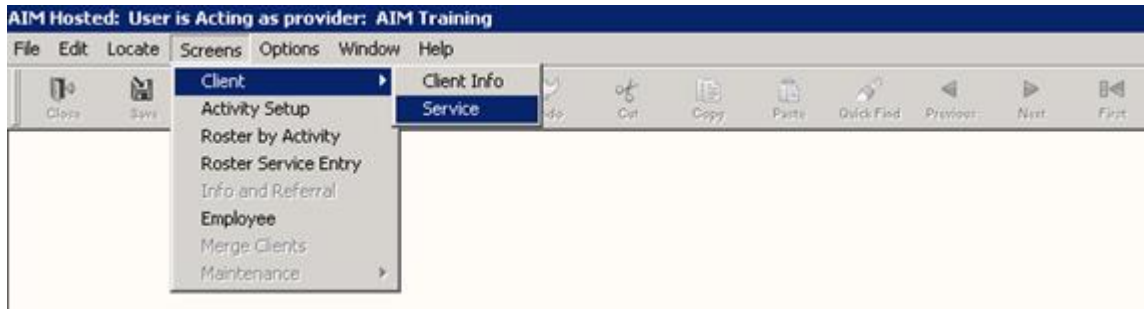
Tip: If you enter a service with a service date that is older than one already in the database it will not be at the top of the list. So if you just entered a service that you think has been lost, check the dates.

If you make a mistake entering a service that cannot be corrected by changing the service date or the number of units, you may have to delete the service entry. [Delete Process](#) or [Update or Delete a Service](#)

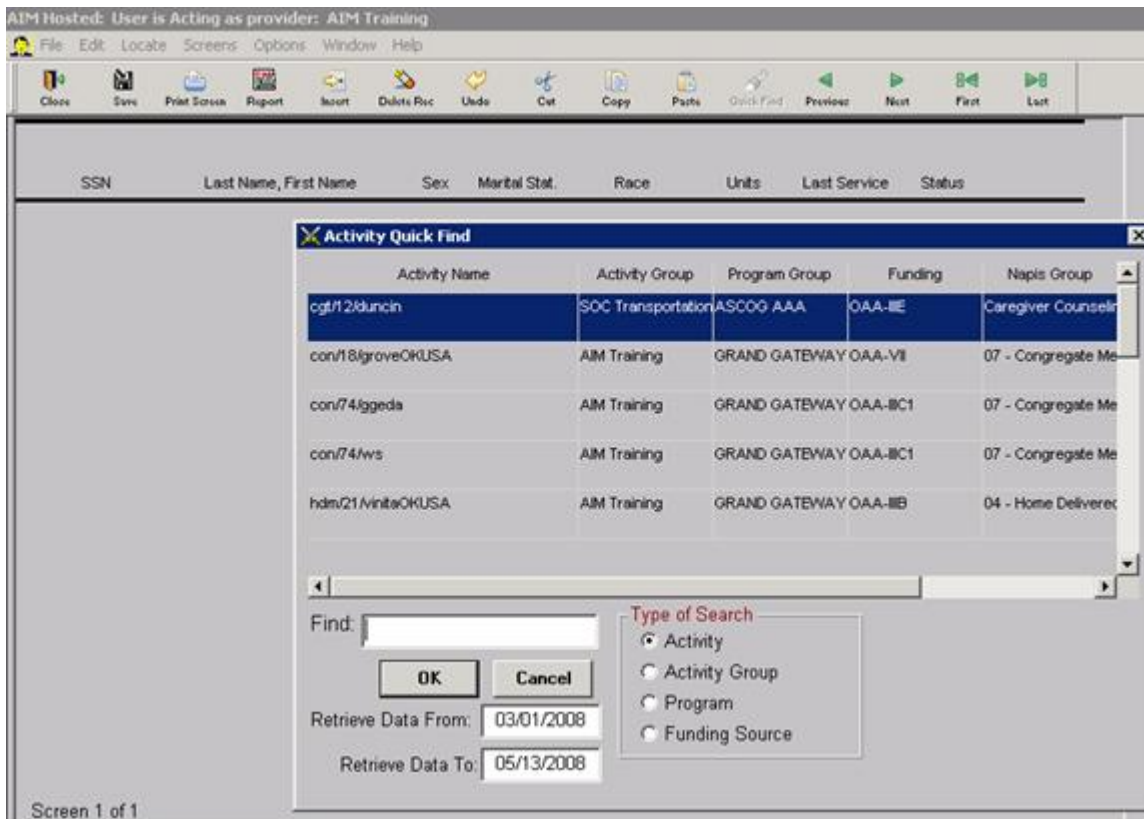
Duplicate services see [Duplicate Service Entry](#)

Service By Activity

To enter services another way start by clicking Screens>Client>Service. Use this method when there are several different clients not on a roster being given the same type of service.



AIM displays the Activity Quick Find for you to choose the service that a list of clients received. Click on your choice.



Notice at the bottom of the screen are two Retrieve Data fields. For an explanation see [Update or Delete a Service](#)

You cannot click Cancel and continue in the service insert process as in Service by Client.

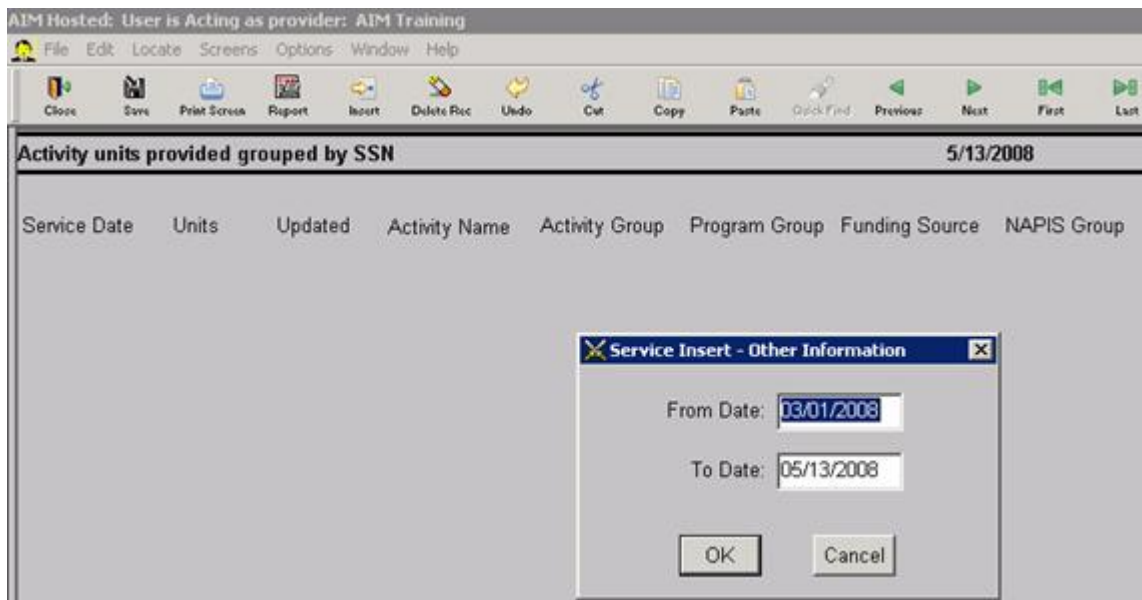
- AIM will display a system error message and disregard the entry.
- You have to click OK whether you are searching for a service or not.
- If there are no services to display you will receive this message.



- Click Yes to Insert new services.
- If there are services in the date range they will be displayed and you will not see the message box. However you are at that point ready to enter services.

From the Service Insert screen, whether blank or with services displayed

- Click the Insert button in the tool bar.
- AIM will display a list of the clients in your database.
- Select the first person to receive this service and click OK.



AIM will display the Service Date/Service Unit window.

Enter the correct date and number of units and click OK.

SSN	Last Name, First Name	Service Date	Units
HIT-01-2203A	Hitchpost, Gallup	08/20/2010	1.00
T00-00-31553	Weatherly, Monson	08/20/2010	1.00
MIL-GH-JK	Mills, Don	08/20/2010	1.00
			3.00

- A line for that client will be added to the service screen.
- Now click the Insert button again, select the next client and click OK.
- You will notice that the service date and number of units remained the same as for the previous client.
- Enter the correct number of units and click OK.
- Continue until you have entered that service for all of the clients on your list.
- Click Save and click close.

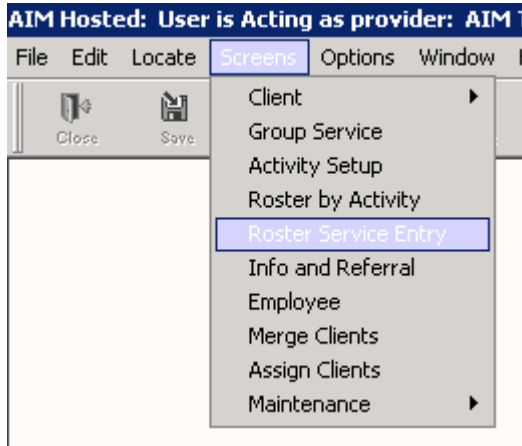
Notice the colored rectangles at the left of the screen.

- In this particular view of service records AIM adds a status flag. Green means that a client's status is Active.
- Red means that status is something other than Active.
- When you see that you are entering a service for someone who is not Active in the database, you need to check the client record to ensure the right person is getting credit for the service.

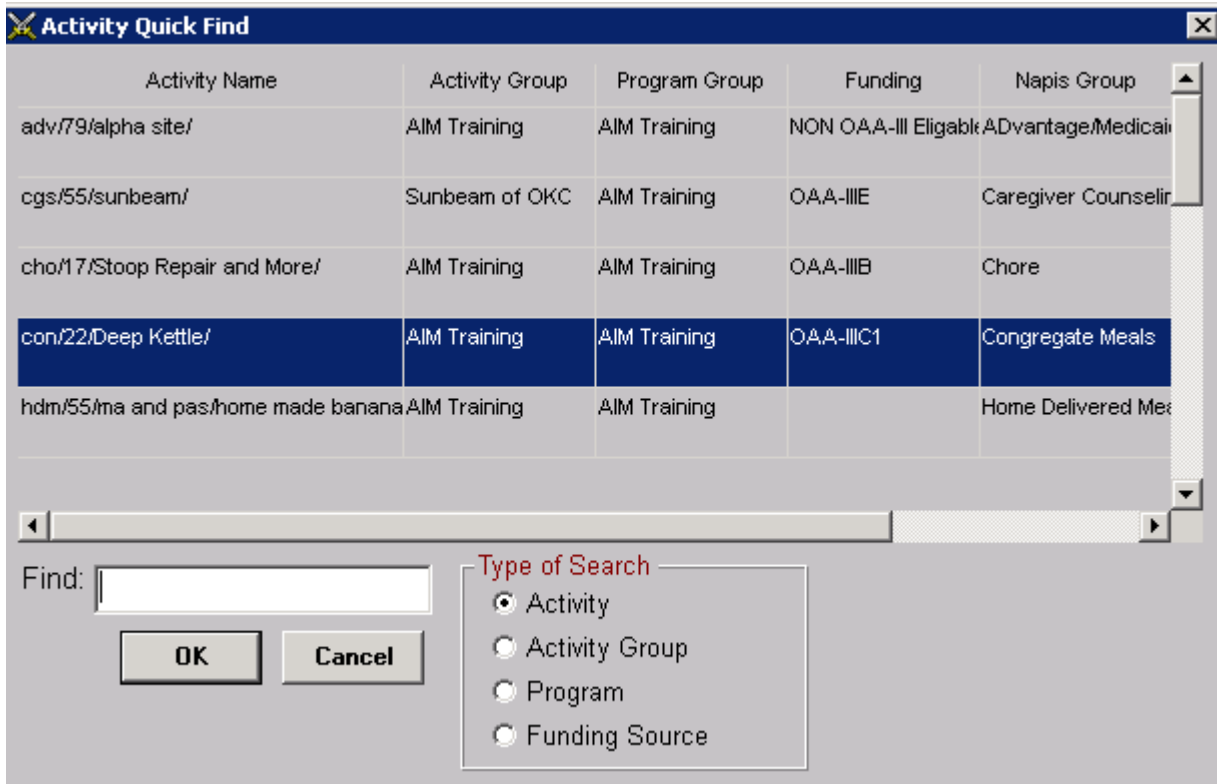
Inserting Service By Roster

Service by roster can ONLY be used for clients that are currently assigned to a roster.

Note: If a new client who eats at a meal site has not been added to that roster, his/her name will not be on the list.



Begin by clicking Screens then Roster Service Entry.



Select a roster from the list and click OK.

Service Date: 06/19/2014 Units: .00 Unit Cost: .00 Auto Fill Save Cancel

SSN	Last Name	First Name	Service Date	Units	Unit Cost
T00-00-98497	Doe	Needsome	06/19/2014	0.00	\$.00
HIT-01-2203A	Hitchpost	Gallup	06/19/2014	0.00	\$.00
Totals:				0	\$0.00

The list is clients that are currently assigned to a roster. Read the directions at the top of the screen. The SSN in this case is the unique ID automatically assigned by the system when a new client is created.

Service Date: 05/30/2014 Units: 22.00 Unit Cost: .00 Auto Fill Save Cancel

SSN	Last Name	First Name	Service Date	Units	Unit Cost
T00-00-98497	Doe	Needsome	05/30/2014	22.00	\$.00
HIT-01-2203A	Hitchpost	Gallup	05/30/2014	0.00	\$.00
Totals:				22.00	\$0.00

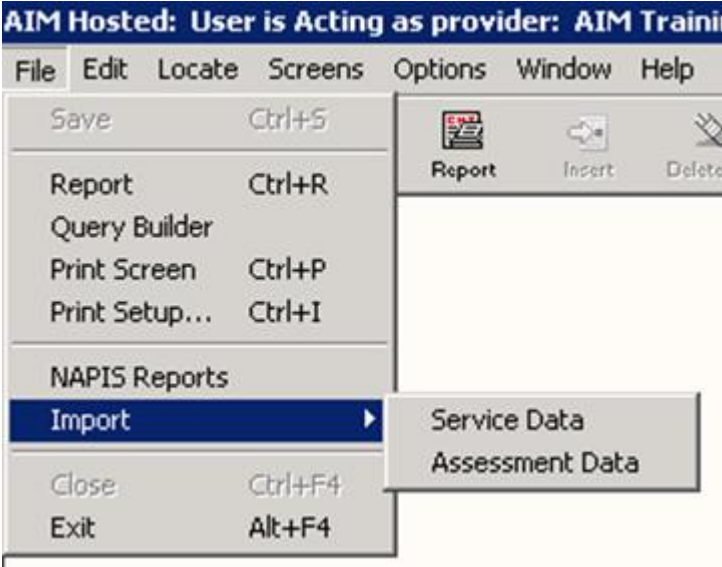
- Set the service date to the desired date of service.
- Set Units to the most frequently occurring number of units for that period.
- Click Auto Fill.
- The Auto Fill button will set all of the information to match the Service Date, Units and Cost at the top.
- Make individual changes to units as appropriate.
- If a client on the list did not receive service during that period, set Units to Zero (0).
- Click Save.

AIM enters all of the services at the same time and immediately returns you to the last screen you were in.

Note: You cannot update or delete service records through this process..

Service By Scanner

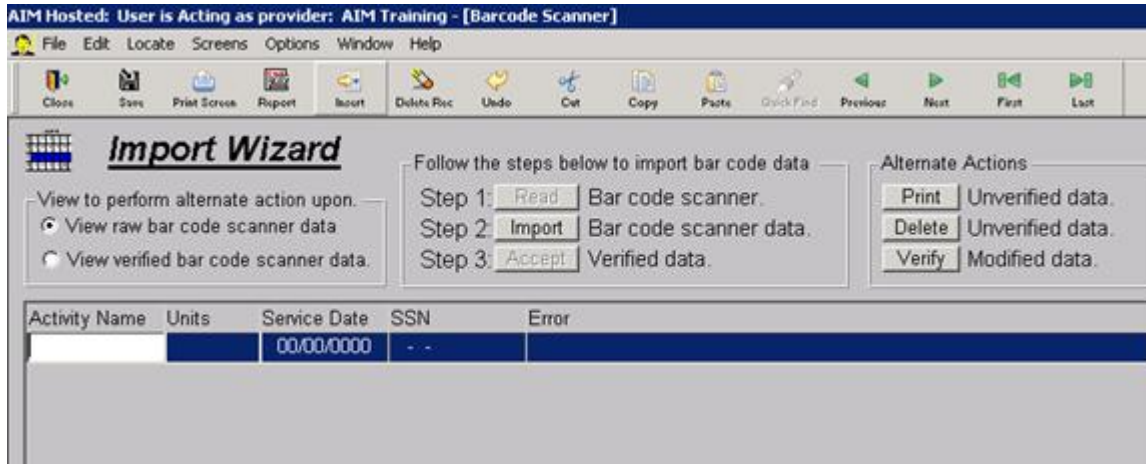
An alternative method for entering services is bar code scanning. There are hundreds of different types of bar code scanners and the State Office does not recommend any particular one. For scanner specification requirements, speak to the Saber Corporation representative. The following instruction is strictly for the hand-held scanner that attaches directly to your computer via USB.



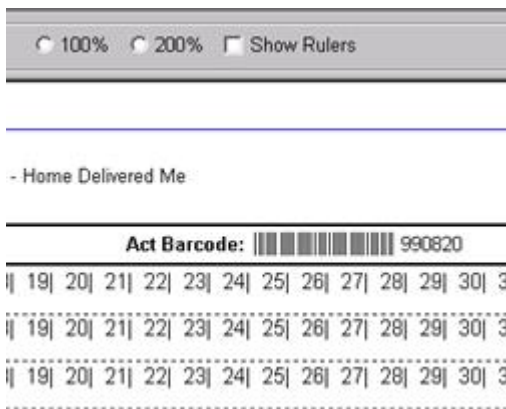
In order to enter services using the bar code scanner first open the AIM scanner interface screen. Click File>Import>Service Data



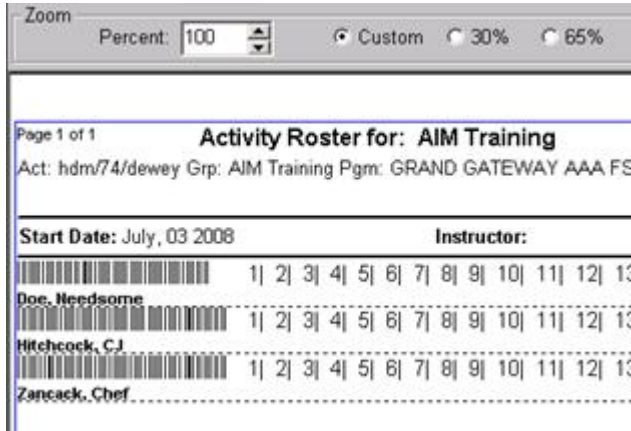
When you see the Import Wizard Screen click the Insert button.



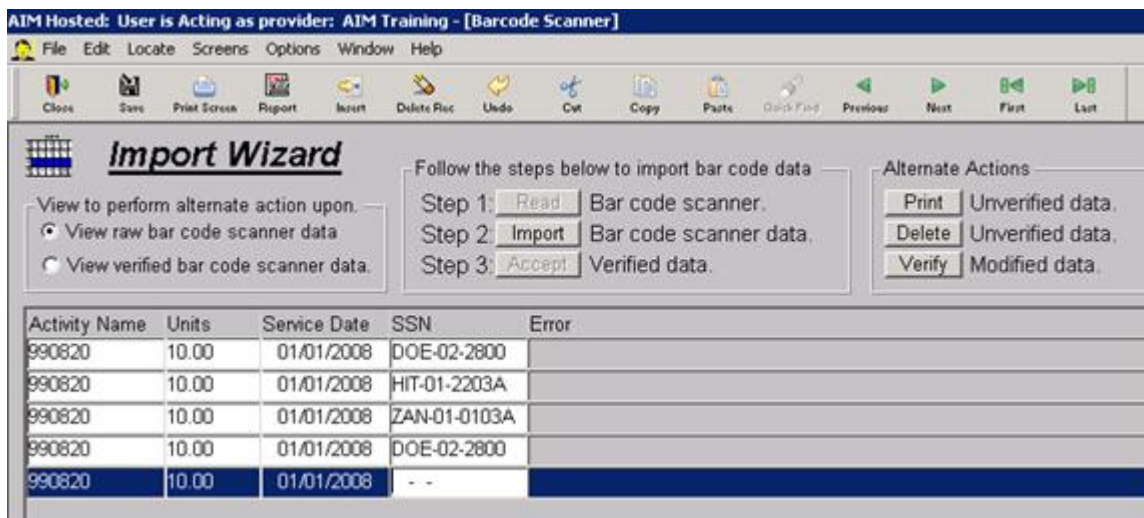
AIM is now ready for you to begin scanning.



- First Scan the Activity.
- Then press tab and key in the number of units.
- Press tab and key in the date.
- Press tab and scan the client's unique ID.



- As soon as the client's ID finishes scanning AIM will advance to a second line for another new record insert.
- Notice that the Activity, Units and Date have been duplicated.
- Make sure the units are correct and scan the next client's ID.
- Continue until every line on the activity roster for that activity has been scanned.



- When you finish scanning the last record the next new record insert with no client ID will be disregarded by AIM. Double check the numbers of units at this time.
- Click the Verify button and AIM will ensure all the information you scanned is ready to be entered into the database.
- After you click the Verify button you can select the option to view the verified data. This view gives you additional information about each record about to be entered into the AIM database.
- If you are satisfied that the information is correct click the Accept button and AIM will add the service entries into your database.

Input Errors



- The two most common reasons services are rejected by AIM are duplicate services and client IDs that no longer exists.
- A duplicate service occurs when there is a duplicate combination of an activity, service date and client ID.
- You will see an error message saying that the Primary Key is not unique.



- Nonexistent client IDs often occur from the use of old activity rosters.
- You will see the message that there is no primary key value for a foreign key.
- The best action for you to take is to highlight the records with errors and click Delete.

Note: If you ever see error messages that say AIM cannot convert or that there is a data type mismatch you most likely scanned a barcode into the wrong field.

Group Service

Unlike other service inserts, the Group Service does not require a client record.

Click Screens > Group Service.

Group Activity Quick Find w/Date Range

Activity Description	Activity Group	Program Group	Funding	Napis Group	Activit
cgm/55/memorial/	Areawide AAA	AIM Training	OAA-III E	Home Delivered Med	Student 2
cgr/14/Aging Service Inc./Caregiver	Aging Services Inc.	AIM Training	OAA-III E	Caregiver Respite C	Student 7
cgr/14/Aging Services, Inc./caregiver respite	Aging Services Inc.	AIM Training	NON OAA-III Eligabl	Caregiver Respite C	Student 6
cgt/12/duncin	AIM Training	AIM Training	OAA-III E	Caregiver Counselir	AIM Training
gpr/14/norman/	Areawide AAA	AIM Training	OAA-III E	Caregiver Respite C	Student 5

Find:

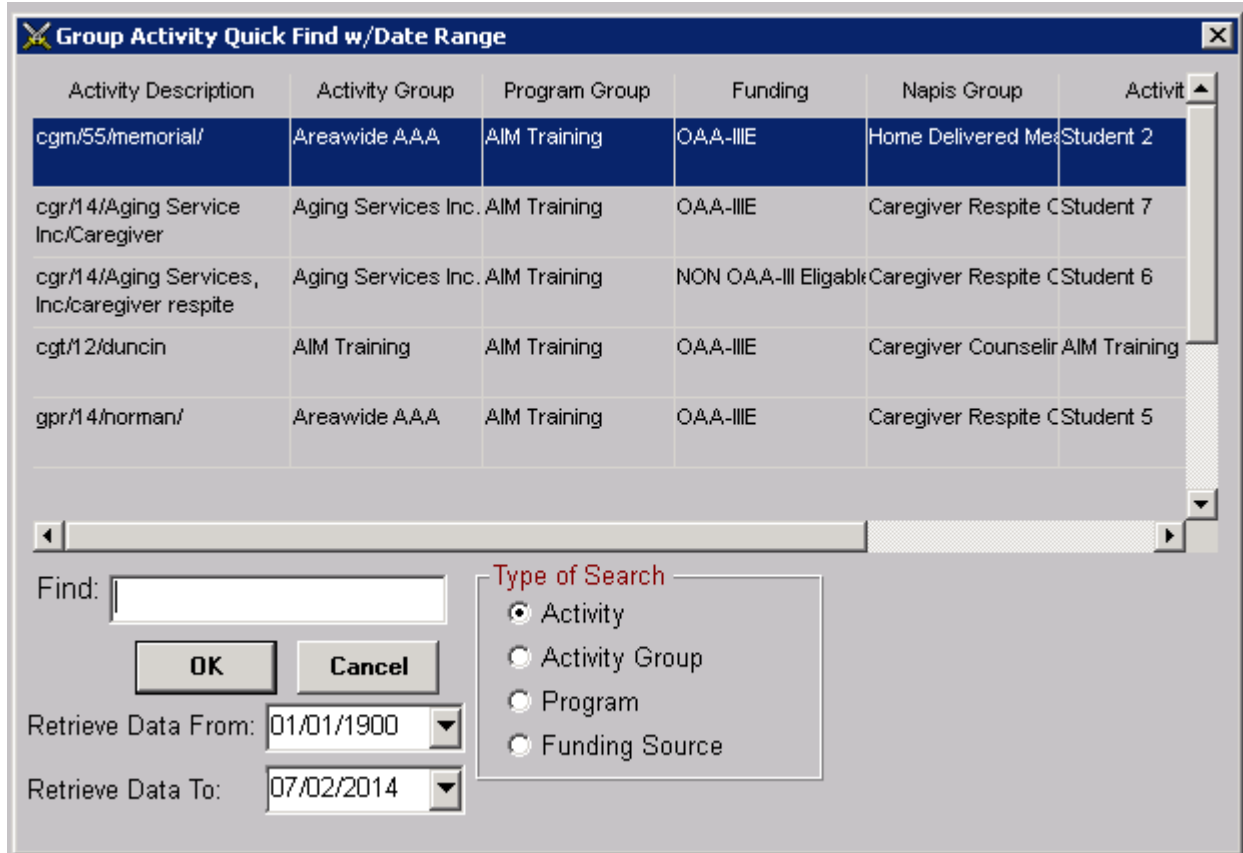
Retrieve Data From:

Retrieve Data To:

Type of Search

- Activity
- Activity Group
- Program
- Funding Source

Note: The dates you see above are for finding group services to update or delete. See [Update or Delete a Service](#)

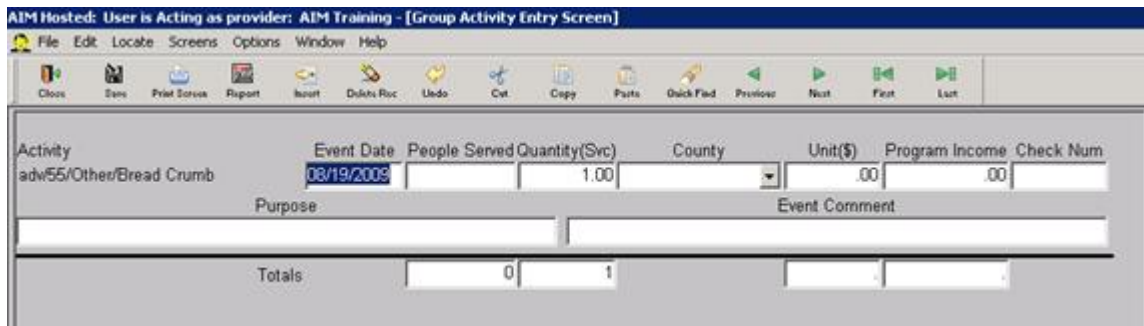


A list of Group Service activities will be displayed.

CAUTION: You must click OK in order to insert a new service. Do not click Cancel.

See [Group Insertion Error](#)

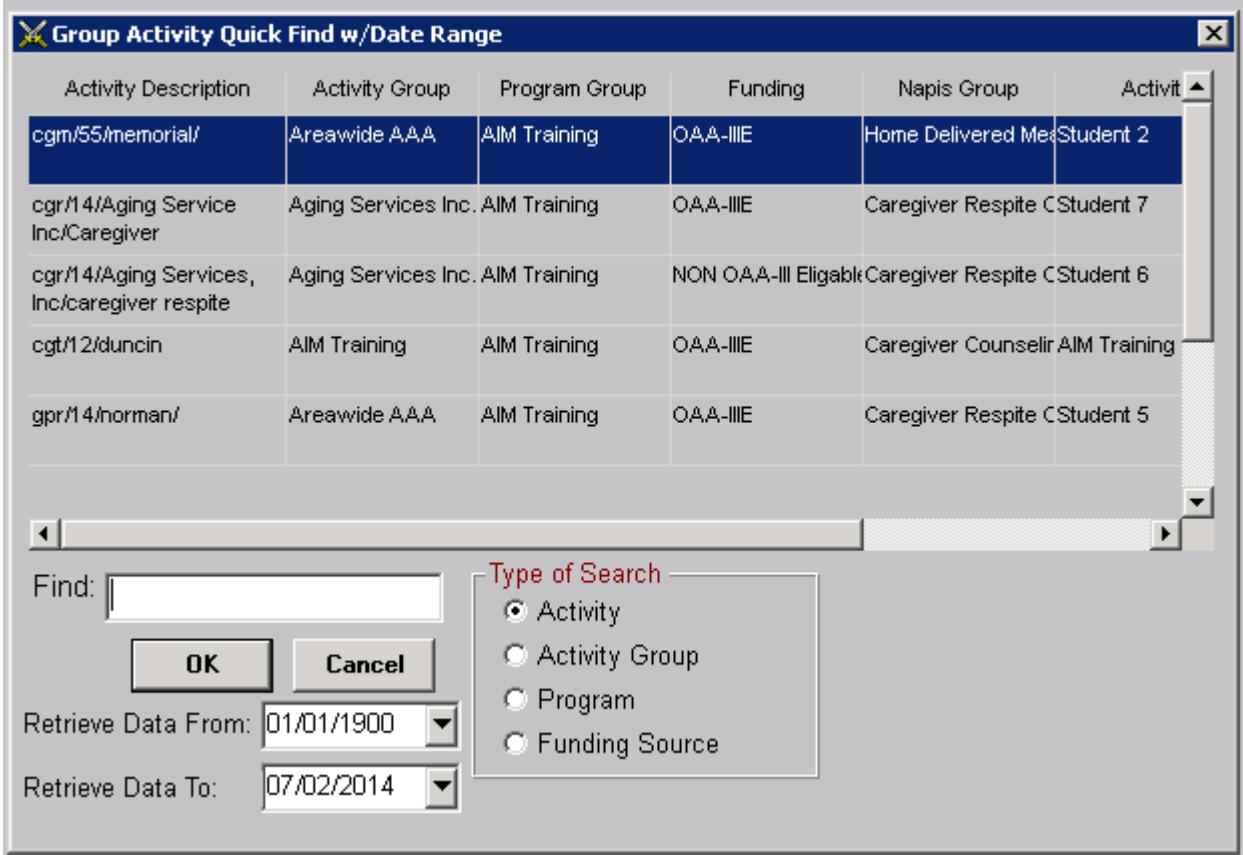
- Select the group activity for which you want to enter a service into AIM and click OK.
- You will see a blank gray screen.
- Click the insert button.
- Next you will see a service insert confirmation screen. Click OK.



You have entered a group service record.

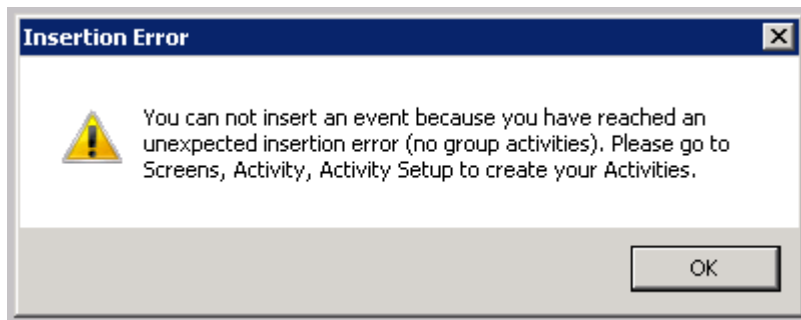
- Double check the Event Date and change if necessary.
- Enter the number of people that attended the group event under People Served.
- The quantity will always be one.
- Enter the county of the event and if you wish the cost and any income collected.
- Unit(\$), Program Income and Check Num are optional that you use at your discretion.
- Use Purpose and Event Comment to record specific details that are helpful for planning similar events.
- Unlike services entered for individual client records, more than one group service can be entered for the same day.
- Click the Save button
- If you have additional events to enter whether for the same day or other days, remain in the screen and click the insert button and repeat the process
- Be sure to click save and then close the screen when you finish your entry for that group activity.
- Repeat the steps for as many group services you have to enter.

Group Insertion Error



Clicking Cancel at the Group Service list interrupts the service insert process.

- The only way to proceed with entering services is to click OK.
- If you click Cancel
- Click Close
- Start from the beginning



If you click Cancel and then click the Insert button in the tool bar you will see this error.

- Click OK
- Click Close.
- Start from the beginning.

Delete Process

Service record deletes can be accomplished through either Service by Client or Service by Activity.

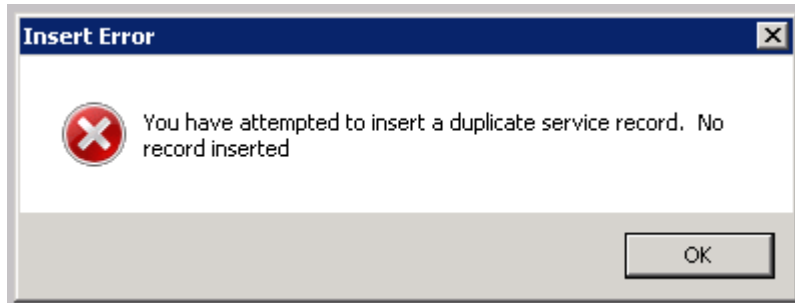
- Start either service by client or activity.
- Enter a date range that includes the service record you want to delete.
- Click OK.
- Click the date field of the service you want to delete.
- Click the Delete Rec button in the tool bar. Click Yes.

Tip: Deleting a client record does not delete the service from AIM. Deleting a client record without deleting a service that needs to be removed will cause some service reports, such as the OKS738, to be incorrect.

Duplicate Service Entry

AIM does not allow duplicate service entries.

A duplicate occurs when you select an activity and date that was already used for a particular client.



You will receive this message and the duplicate entry will be discarded when you click OK. The only way to make a second entry of the same service for that client is:

- Use a different service date
- Increase the number of units on the existing entry.

Assessment Management

Assessment Screen Tour

The assessment date cannot be changed by the user. Changes must be requested in writing along with the reason why.

There are two primary sections of the assessment screen.

The top includes information about the client, the visit and the assessment form.

- The Next Assess Date is an AIM default that can be set for a user to any given number of days. For example the one below is set to 180 days.
- The assessment detail section which is under Category, Question and Answer can be designed to fit special needs. The different designs are listed under Assessment Type. For most users, only one type is available at this time.
- The Reassessment box is for informational purposes only. Checking it does not alert AIM in any way.
- Provider is the name of the Provider that inserted the assessment.
- The Lock Assessment Answers box is automatically checked when an assessment screen is opened. The check must be removed in order to make changes to assessment answers.
- In Red Letters is Assessment 1 of 2. This means that you are viewing the most recent of two assessments on this client. By clicking the NEXT button on the right end of the tool bar, AIM will move to the previous assessment. The red message at the bottom of the info screen will change to Assessment 2 of 2.
- For information on how to use the remainder of the fields in the top portion of the assessment screen see your AAA or State Field Representative.

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Last Name:	First Name:	Assessment Date:	Next Assess Date:	Assessment Type:	Reason for Closure:
Hitchpost	Gallup	10/01/2018	03/30/2019	O3A.2012	
Legal Guardian:	Provider:	Reassessment?	Interview Info		Referral Source
Doctor Name:	AIM Training		Began: 00:00	Ended: 00:00	Last Name: First Name: Middle Name: Relationship:
Doctor Phone 1: () -			Initial Contact Date: 00/00/0000	AIM Entry Date: 06/12/14 13:11	Home Phone: () - Cell Phone: () -
Medicaid #:			Interview Date: 00/00/0000	Data Entry Staff Initials:	Email:
Medicare #:					
Assessor:					
<input checked="" type="checkbox"/> Lock Assessment Answers	<div style="background-color: red; color: white; padding: 2px;"> Please review policy OAC 340.405.10-51 (a)(11) to verify what data elements each service is required to obtain during the intake assessment. </div> Assessment 1 of 2				

Category	Question	Answer
Intake Supplemental	Participates in similar program? Yes see client info screen	No
		Yes: Meal Site or Independent Sr Center
	Directions to Home?	Yes (Click the Other Info Button in Client Screen)
		No
	Marital Status?	Married
		Divorced or separated
		Widowed
		Single, never married
		Unknown
	Residence?	Private
		RCF or Group Home
		Nursing Home
		Other
		Own Multiple Dwelling (Apartment/Condo)
		Rent Private Residence
		Rent Multiple Dwelling (Apartment/Condo)
	Household Composition?	Alone
		W/Spouse
		W/Children
		W/Relatives

General Medical Medication Justification **View Graph** Combined Score: 20 Category Scores View Criteria

The bottom part is the detailed assessment tool.

- It contains the categories, questions and optional answers for the Functional, Nutrition, ADL and IADL questions that are answered on the intake form.
- The detailed assessment tool is organized in the form of a table with three columns – Category, Question and Answer. All of the answer options are grouped together for each question. There are five possible answers for the question of Marital Status. For Residence there 7 answers to choose from.

There are also buttons at the bottom of the screen that when clicked open a note pads, a graph, a question score sheet and a list of questions answered.

When you want to review a client’s previous assessments, open the Assessment screen. AIM will take you directly to the most recent assessment.

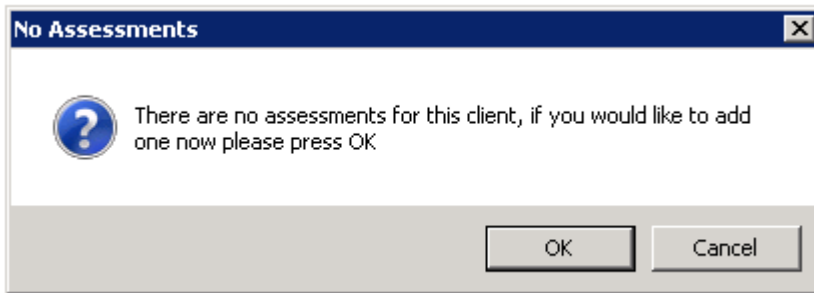
Initial Assessment

The Assessment screen is used to record the results of client interviews. Always use a client’s completed intake form in conjunction with this screen. Enter only information provided on the form.

To open or create an Assessment, first open the client record of the person assessed.

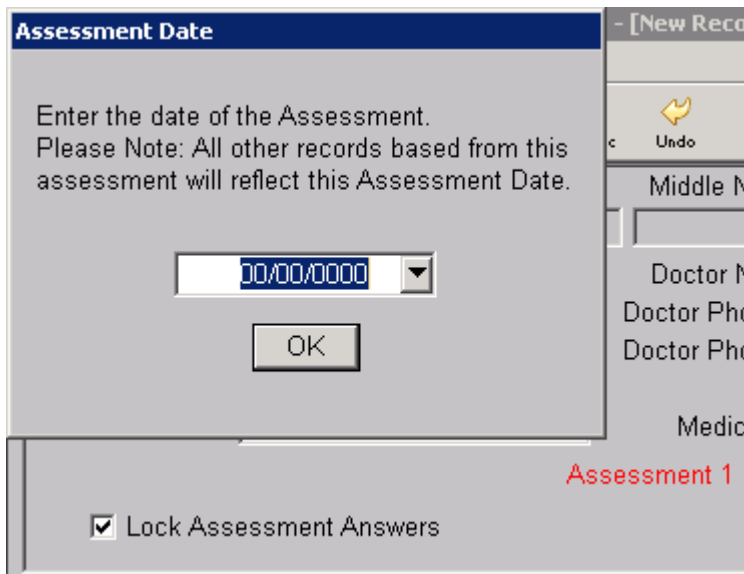


Once inside the client record click the Assessment quick link button which is located at the upper left end.



If a client does not already have an assessment in AIM you will receive this message.

- Click OK to continue with inserting an assessment record.
- Click Cancel to return to the client screen.



- Enter the date of the assessment and click OK.
(Note: You cannot return to the client screen from this window. If you changed your mind at this point you have to enter a date, click OK and delete the record.)

If the client already has an assessment completed in AIM it will open directly into the most recent assessment record.

Note: The assessment date cannot be changed by the user. Changes must be requested in writing along with the reason why. The alternative is to delete the assessment and re-insert.

The information fields at the top are self explanatory. See [Assessment Screen Tour](#)

Begin entering assessment details by clicking the Lock Assessment Answers to remove the check.

The screenshot shows the assessment software interface. At the top, there are fields for Last Name, First Name, Assessment Date, Next Assess Date, Assessment Type, and Reason for Closure. Below these are fields for Hitchpost, Provider, Reassessment?, Interview Info (Began, Ended, Initial Contact Date, AIM Entry Date, Interview Date, Data Entry Staff Initials), and Referral Source (Last Name, First Name, Middle Name, Relationship, Home Phone, Cell Phone, Email). A red box highlights a policy note: "Please review policy OAC 340.405.10.51 (a)(11) to verify what data elements each service is required to obtain during the intake assessment." A checkbox for "Lock Assessment Answers" is checked. Below the form is a table with columns for Category, Question, and Answer. The table contains several rows of questions, with the correct answer highlighted in dark blue. At the bottom, there are buttons for General, Medical, Medication, Justification, View Graph, Combined Score: 20, Category Scores, and View Criteria.

Category	Question	Answer
Intake Supplemental	Participates in similar program? Yes see client info screen	No
	Directions to Home?	Yes: Meal Site or Independent Sr Center Yes (Click the Other Info Button in Client Screen) No
	Marital Status?	Married Divorced or separated Widowed Single, never married Unknown
	Residence?	Private RCF or Group Home Nursing Home Other Own Multiple Dwelling (Apartment/Condo) Rent Private Residence Rent Multiple Dwelling (Apartment/Condo)
	Household Composition?	Alone W/Spouse W/Children W/Relatives

- To enter an intake response to AIM click the line that contains the correct response so that it highlights in dark blue.
- All of the answer options are grouped together for each question. There are five possible answers for the question of Marital Status. For Residence there 7 answers to choose from. If after you select an answer, you need to change it, click it again to remove the highlight and then click and highlight the correct line. When you are finished, click the save button in the tool bar.
- When you close the assessment screen the assessment answer lock will automatically reactive.

The AIM database can store hundreds of different assessments on each client. In order to insert an additional assessment on a client that already has one you must:

- Open the client's assessment screen.

- Click the Insert button in the tool bar.
- Enter the date of the assessment and click OK.
- Click the box next to Lock Assessment Answers to remove the check mark.
- The new assessment is a copy of the previous. AIM reproduces the most recent assessment. If you are not sure you are looking at the new assessment, check the date. The Assessment Date is the date just entered and the Next Assessment date has been adjusted for an additional 6 or 12 months.
- Since this is a reproduction of the client's most recent assessment you do not need to re-answer all of the questions. Simply scroll through the detailed assessment screen and make the appropriate changes. When you are finished click Save then Close.
- When you are finished click Save and Close

At the bottom of the Assessment screen are some additional quick link buttons.



The four three buttons (General, Medical, Medication and Justification) connect you to note pads for journal entries.

The two buttons to the right are:

Assessment Category	Score
Nutritional Health	12.00
Activities of Daily Living (ADL/IADL)	8.00
Intake Supplemental	.00
Eligibility	.00
Combined Score:	20.00

Category Scores button which provides a combined score breakdown.

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Category	Question	
Intake Supplemental	In the last 2 weeks have you had little interest/pleasure in doing	Yes
Intake Supplemental	In the last 2 weeks have you felt down, sad or hopeless?	Yes
Intake Supplemental	Grandparent raising grandchild(ren)	Yes. (See client scre
Intake Supplemental	Are you a primary caregiver?	Yes.
Activities of Daily Living (ADL/IADL)	Dressing (ADL)	Some assist/supervis
Activities of Daily Living (ADL/IADL)	Bathing (ADL)	Can't do at all (3)
Activities of Daily Living (ADL/IADL)	Transferring (ADL)	Can't do at all (3)
Activities of Daily Living (ADL/IADL)	Walking (ADL)	No assistance (0)
Activities of Daily Living (ADL/IADL)	Transportation (IADL)	No assistance (0)
Activities of Daily Living (ADL/IADL)	Prepare Meals (IADL)	No assistance (0)
Activities of Daily Living (ADL/IADL)	Light Housekeeping (IADL)	Some assist/supervis
Activities of Daily Living (ADL/IADL)	Shopping (IADL)	Some assist/supervis
Nutritional Health	Illness made change in amount or kind of food	Yes (2)
Nutritional Health	Fewer than 2 meals/day	Yes (3)
Nutritional Health	Eat Few Fruits or Veg. or Milk products/day	Yes (2)

View Criteria that shows a comprehensive list of the questions answered.

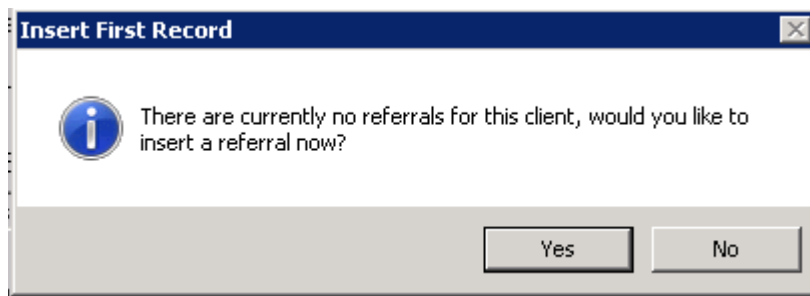
The View Graph button connects to a bar graph that illustrates a client's assessed progress over the period of years assessed.

Referral Management

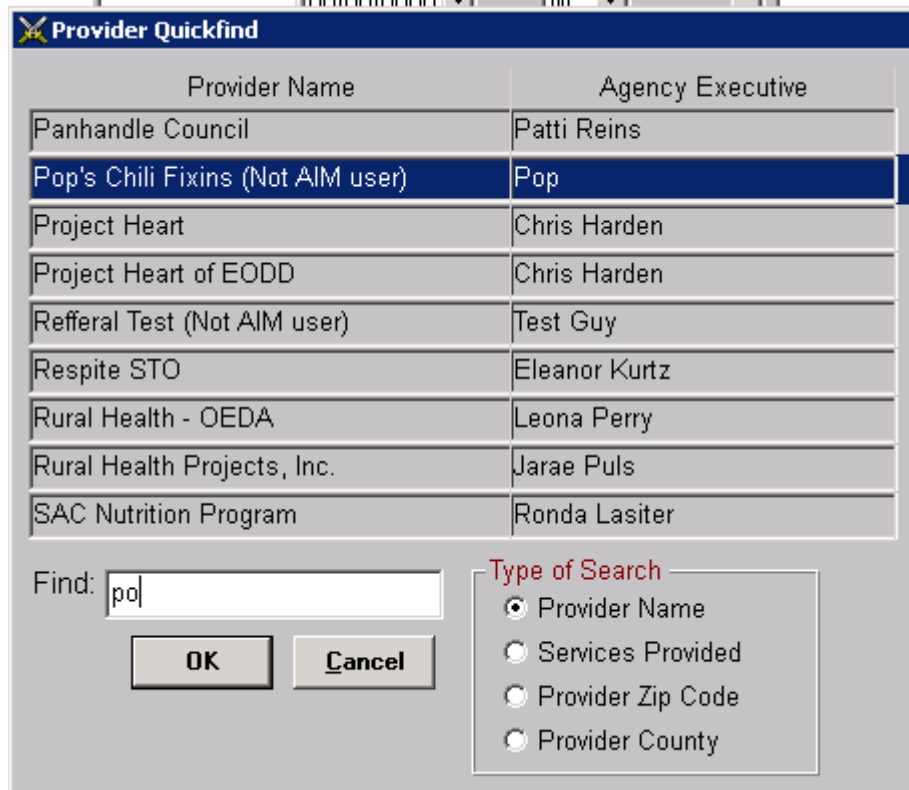
Enter and Update a Referral

Open a client screen

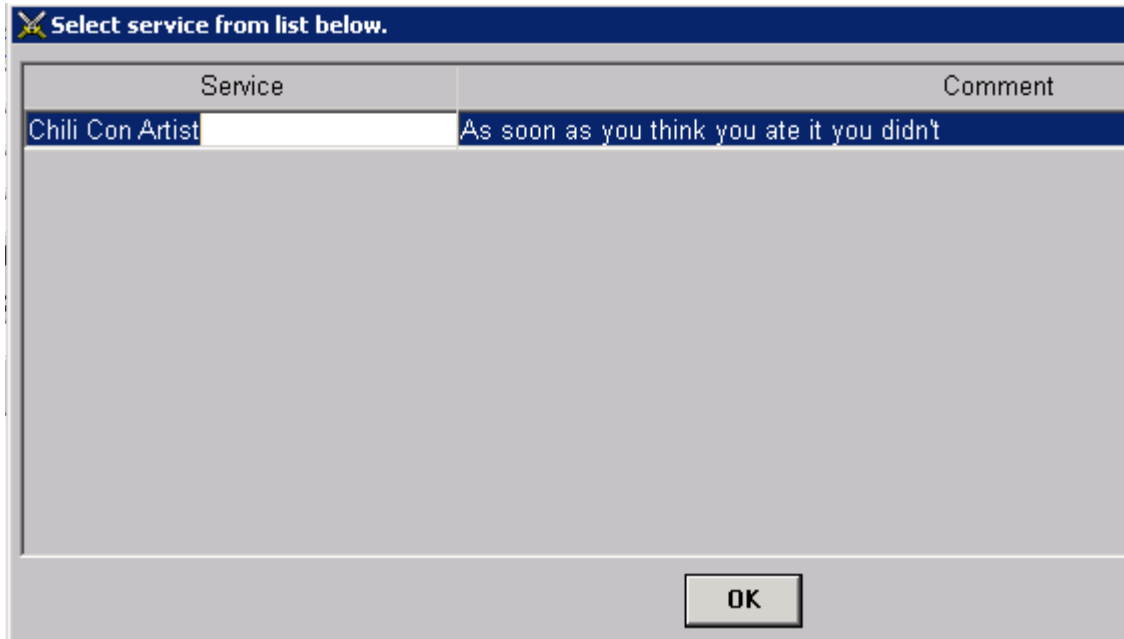
From a client record click the Referral Button



- If a message that says there is no referral Click Yes
- If there is already a referral AIM will open a referral screen. Click the Insert button in the tool bar.



Select the Agency you are referring a client to and Click OK



Select the Service you are referring the client for and Click OK

Your selection is entered

- The number of times and providers this client has been referred is in blue.
- To the right of the client name are the provider making the referral and the provider receiving the referral.
- Under the client name is the service being referred to and the referral date.
- The service plan is used by the provider receiving the referral

This client has 6 Referrals for 5 Provider(s). You are viewing Referral: 1

Client Name (last, first middle)	Referred By Provider	Referred-To Provider
Hitchpost, Gallup Training	AIM Training	Pop's Chili Fixins (Not AIM user)

Referral 1 of 6 for this Provider

Referred for Service	Referral Date:	Total Units:	Frequency:	Start:	End:
Chili Con Artist	05/02/2014	.00		00/00/0000	00/00/0000

Disposition of Action Pending	Disposition Action Date	Provider Order:
New Referral	06/04/2014	Sorted

Special Circumstances

Message Center

- The Disposition of Action Pending defaults to 'New Referral' when inserted. It is to be changed to the current action as the referral process progresses along with updating the Disposition Action Date. When the referral action is complete changing disposition of action pending to 'Verified' closes the referral.
- A client can have any number of referral records at a time. When Provider Order is set to Sorted, the referrals are sorted by the name of the referred to provider.
- Special circumstances is information about a client that would impact ability to accept service.
- Use the message center to document conversations about the referral between the two providers.
- Click save. You have completed a referral

Providers receiving referrals

- Run a fresh referral list which is the [OKC124](#) report.
- Open the client screen of one of the clients on the list.
- Click the Referral button.
- There may be more than one referral in a client's record. Check the referred-to provider to make sure it is you. If not you can navigate through the referrals using the Next/Previous buttons in the tool bar.
- When the receiving provider opens the referral screen and finds the specific referral record of interest perform the following actions:

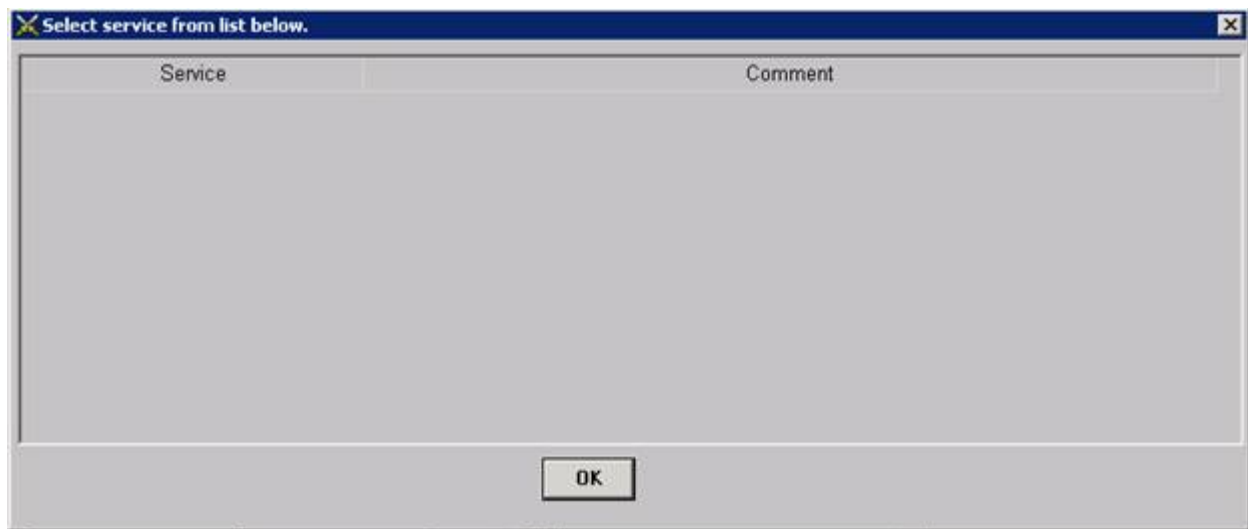
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- Select the appropriate disposition of action pending.
- Ensure the disposition date is the current date
- Enter total units, frequency and duration dates according to the plan of service if there is one
- Enter comments to the referring Provider in message center

You can enter as many referrals for a client as you need.

- Insert a referral for a second provider
- Insert a referral for a second service for the same provider

Potential issues:

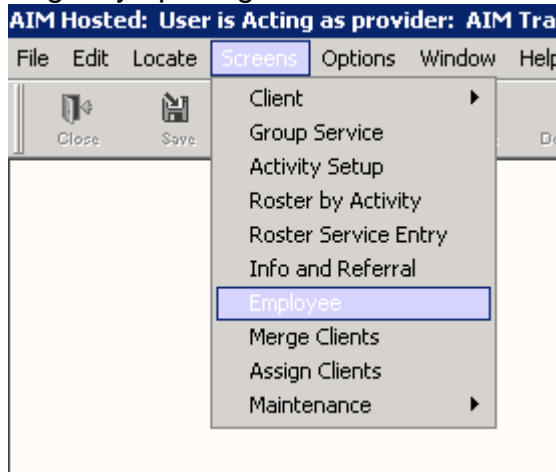


- If after you select a provider you get a screen that looks like this, it most likely means that there are no services registered in AIM for that provider.
- Providers will eventually be able to enter new providers and provider services. But for the time being all new entries for providers and provider services will be accomplished by the state office.

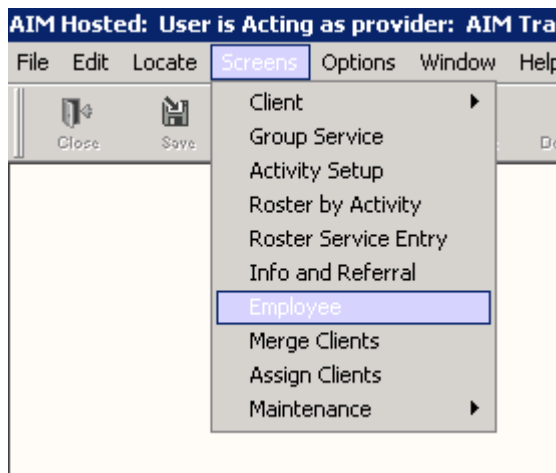
Employee management

Open an Employee Record

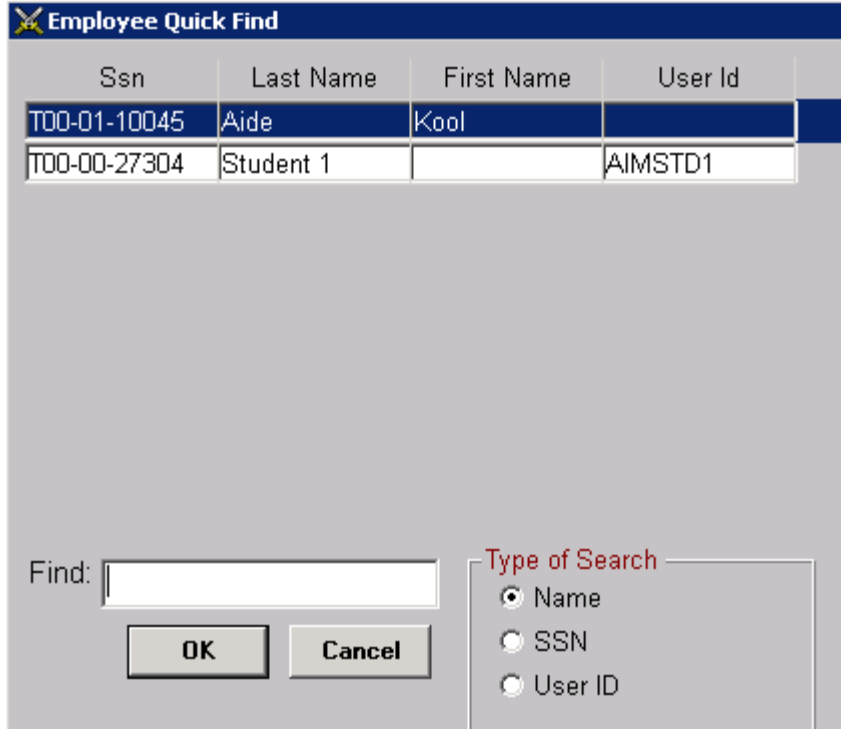
Begin by opening AIM to the initial AIM screen then click Screens > click Employee



Select someone from the employee quick find list and click OK.



Even though you cannot assign a User ID you can see that User ID's that have been assigned to employees under you.



The image shows a dialog box titled "Employee Quick Find". It contains a table with the following data:

Ssn	Last Name	First Name	User Id
T00-01-10045	Aide	Kool	
T00-00-27304	Student 1		AIMSTD1

Below the table, there is a "Find:" text box, an "OK" button, and a "Cancel" button. To the right of the "Find:" box is a "Type of Search" section with three radio buttons: "Name" (selected), "SSN", and "User ID".

Kool is an employee that does not access the database. Select any record from the list of employees displayed and click OK.

Users and Non-Users

- A User is an employee who has been assigned a User ID and password in order to access the information in the database.
- User employees are assigned and managed by the AIM system Administrators.
- A Non-User is an employee who is not assigned a User ID and cannot access the information in the database.
- Non-User employees can be assigned and managed by anyone who has access to the AIM database.

User Employees are not covered in this instruction.

Insert a New Employee

Non-Users

In order to Insert a new employee you must have an employee record open.

SSN:	Last Name:	First Name:	Middle Name:	Job Title:	DOB:	Sex:
T00-00-27304	Student 1			AIM Training	09/14/1952	Female
Contact Information						
Address1:			Home Phone: () -			
Address2:			E. Contact Phone: () -			
City:			E. Contact Name:			
State: Oklahoma		Zip: -	User ID		AIMSTD1	
E-Mail						
Start Date:	Pay Grade:	Skill Set:	<input checked="" type="checkbox"/> Is Operator	Status:		
10/29/2009			<input checked="" type="checkbox"/> Is Assessor	<input checked="" type="radio"/> Active		
Employer / Owning Agency			Permission	<input checked="" type="checkbox"/> Is Case Worker	<input type="radio"/> Inactive	
Student 1			Read/Write/Delete			
Employee Comments			Employer Comments			
User Last Login Time:	06/19/14 18:01:00:000					
Password Created On:	06/18/14 11:58:35:000					
Password Failed Login Attempts:	0					

Click the Insert button in the tool bar. (Not Shown Here)

Employee ID Entry Screen

Enter the new Employee's ID or push "Generate ID".

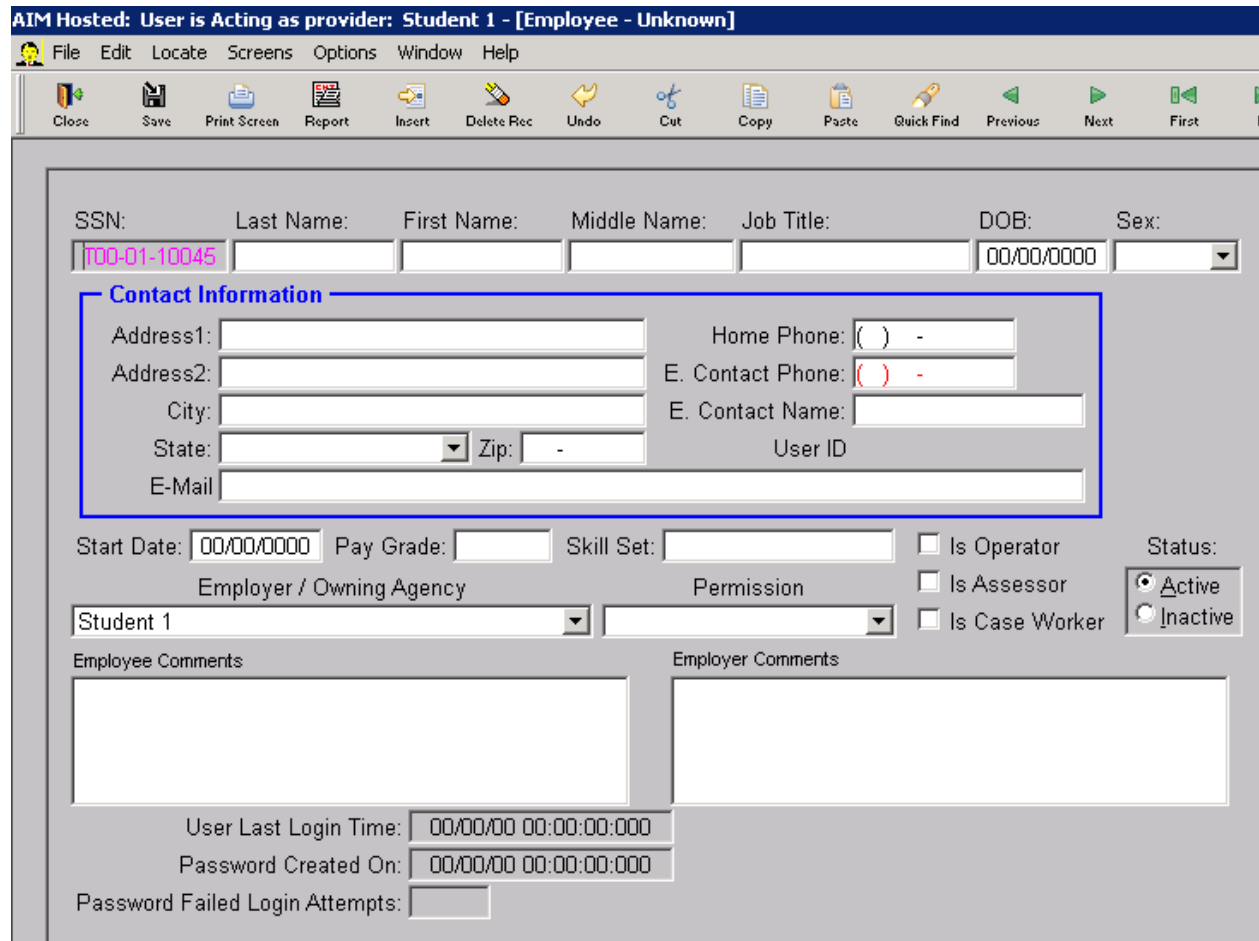
--

You may type in an ID that you want to use and click Generate & Continue. Or you can have AIM assign an automated number by clicking Search.

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Click the Generate button.



AIM will produce a new blank employee screen.

You need to complete the following.

SSN:	Last Name:	First Name:	Middle Name:	Job Title:	DOB:	Sex:
100-01-10045	Aide	Kool		Class Evaluator	00/00/0000	
Contact Information						
Address1:			Home Phone: () -			
Address2:			E. Contact Phone: () -			
City:			E. Contact Name:			
State:		Zip:	User ID			
E-Mail						
Start Date:	Pay Grade:	Skill Set:	<input type="checkbox"/> Is Operator		Status:	
00/00/0000			<input checked="" type="checkbox"/> Is Assessor		<input checked="" type="radio"/> Active	
Employer / Owning Agency			Permission		<input type="radio"/> Inactive	
Student 1						
Employee Comments			Employer Comments			
User Last Login Time:		00/00/00 00:00:00:000				
Password Created On:		00/00/00 00:00:00:000				
Password Failed Login Attempts:						

- The SSN, which is the Employee ID, is system assigned here. You may change the ID if you wish but that is not necessary.
- Near the bottom on the left side you should see that the Employer/Owning Agency field already shows your provider name. The cursor is now at the SSN field so press tab once to advance the cursor the last name field.
- Enter the person's last and first name.
- Enter the person's job title. For example Case Worker, Cook or Planner.
- All other personal information for employee is optional.
- Look to the lower right of the employee screen. Status is already set to Active.
- To the left of Status are three check boxes arranged vertically. Place a check mark in each box that applies. These will determine which lists the employee's name appears in Caseworker and Operator in the client screen and Assessor and Operator in the assessment screen.
- Click the Save button.

Not every job title will line up exactly with one of the three choices. The important thing to consider is whether you want this person's name to appear in the lists for caseworker, operator or assessor. For instance, you may not need a Planner to be on one of those lists. In that case, you would leave all three boxes blank. In our example screen Kool Aide is an Evaluator so the Assessor box is the only one checked.

Also, some project managers like to keep track of other employees such as drivers, cooks, office administrators, directors, etc who do not have a need to access the database and who will not appear on any lists. You may enter as many employees and as many types of employees as you wish. For these employees you will leave all three

boxes blank so that their names do not show up on the caseworker/operator/assessor lists in the client and assessment screens.

Note: Only use the Employee screen for real people. Do not use it for job positions or site locations.

Delete an Employee

Deleting Employee records is very easy and unforgiving. Open the employee record you want to delete. Click the Delete Rec button in the tool bar.

CAUTION!!! AIM does not warn you that you are preparing to delete an Employee record. You will not get a message asking if you are sure.

First ensure you are in the employee screen of the employee that you want to delete.

At the top of the employee screen where you see the row of shortcut icons, click the delete record icon. The employee record showing at the time will be immediately deleted without any kind of warning message, and the next available employee record on the list will display in its place. This is very important to remember so that someone does not mistakenly delete the next employee thinking that the delete did not take place.

Also, Deleted Employees whose the names are case workers or operators in the client screen or assessors in the assessment screen will be immediately removed from those fields.

Again -- If an employee's record is deleted without first changing the name in client or assessment as the case worker or assessor then the deleted employee's ID number will appear in its place. You will have to go through the client records one at a time to correct them.

**** BIG TIP ****

When employees leave and new people are hired in their places, instead of deleting and reinserting, simply change the name in the Employee Screen. That way, if a new employee is taking over a previous employee's case load, the name in the case worker field of the client screen will automatically change to the name of the new employee.

S56A and C

56 General Remarks

S56 Expenditure and AAA Staff Reporting Automated

The S56C Expenditures data sheet and S56A Staffing data sheet are now located in AIM. To access the S56 screens you must use an S56 AIM log-on which is provided by the state office.

Each AAA will initially be given two S56C User IDs, for the Planner and Accountant and one S56A User ID. Other S56 User IDs will be set up only upon request including those for Providers. Accountants will be given only Read/Write permission and access only to the screens necessary for them to view the S56C data sheet. There is one S56 database for each AAA.

The S56C Expenditure screens can be completed by either the AAA or by a provider. However, Provider use is strictly at AAA discretion and will not be used by the State NAPIS Office to compile the annual expenditure report to AoA. The S56A Staffing Report which is available by clicking the Custom Screen 2 button is intended to be completed by the AAA only.

The client screen was modified to be used as S56 identification sheets so messages boxes and title bars will still refer to clients. Once logged onto AIM, click Screens>Client>Client Info. The client quick find list will appear with a list of the existing S56 records. To create a new S56, open any record on the list. Since we are using a modified client screen, the process for generating a new S56 is the same as generating a new client record. Click the Insert button in the tool bar then Click the Generate button at the bottom of the next screen. AIM will open a Blank S56C/A screen as shown in figure 1.

S56C Expenditures

Procedures for entering new S56C Expenditure data.

Log onto the S56C database. Click Screens>Client Info. Click on any record on the list and click OK. In order to open a new S56C you must be in one of these screens.

Click the Insert button in the tool bar then click Generate at the bottom of the next screen.

You now have a new blank S56C Identification screen.

Assessment	Client Activity	Custom Screen 1	Roster by Client	Waiting List
History	Care Needs	Custom Screen 2	Owners	Income Src

Expenditure (Cost) Report

Expenditure Report Identification

Provider Name	AAA Name	Prepared By	Ending Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Report Range	Report Month	Report Fiscal Year	Last Updated
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

After you complete the entries for the Expenditure Report Identification
Click the Custom Screen 1 Button above

Make all the appropriate selections/entries in each field.

- Select your office from the Provider Name List. If you are at a AAA office use the appropriate AAA Provider name.
- Select the appropriate AAA from the AAA list. This may seem to be redundant. However, since the S56C is designed to allow Providers to use it, it is important to select the correct information for both fields so that when the state office reviews them we know that it was not a provider that forgot to enter their name.
- Prepared by is the title of the person entering the data for the S56C.
- The ending date will always be the last date of the month for which expenditures are being entered.
- Report range will always be Monthly.
- Report month is the name of the month expenditures are being entered for.
- Report Fiscal Year is the **Federal Fiscal Year**.
- Last Updated is the date that the record was last changed. Initially it should be the date you created a new S56C.
- When the Identification fields are correct, click the save button in the tool bar then click the quick link button labeled Custom Screen 1.

Note: The quick link buttons which appear in other client records are still available but are of no use to you here except the Custom Screen buttons to move to the detailed data screens and the Other Info journal for any comments you need to make in reference to the preparation of the S56C or S56A.

Enter your monthly expenditure/cost details.

S56C Expenditure Report Details							
Total Service Expenditure	Total Title III	OAA Title III Expenditures (\$) By Part (Federal Funds)					Program Income Received
		B	C1	C2	D	E	
Personal Services: \$0.00	.00	\$0.00			\$0.00		\$0.00
Homemaker: \$0.00	.00	\$0.00			\$0.00		\$0.00
Chore: \$0.00	.00	\$0.00			\$0.00		\$0.00
Home Delivered Meals: \$0.00	.00			\$0.00	\$0.00		\$0.00
Adult Daycare: \$0.00	.00	\$0.00			\$0.00		\$0.00
Case Management: \$0.00	.00	\$0.00			\$0.00		\$0.00
Congregate Meals: \$0.00	.00		\$0.00		\$0.00		\$0.00
Nutrition Counseling: \$0.00	.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Assisted Transportation: \$0.00	.00	\$0.00			\$0.00		\$0.00
Transportation: \$0.00	.00	\$0.00			\$0.00		\$0.00
Legal Assistance: \$0.00	.00	\$0.00			\$0.00		\$0.00
Nutrition Education: \$0.00	.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Information and Assistance: \$0.00	.00	\$0.00			\$0.00		\$0.00
Outreach: \$0.00	.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Advocacy and Representation: \$0.00	.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Education and Training: \$0.00	.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Health Promotion: \$0.00	.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Home Repair: \$0.00	.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
Coordination of Services: \$0.00	.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00
CG-Counsel/Suprt Grps/CG Train: \$0.00	.00					\$0.00	\$0.00
CG-Respite Care: \$0.00	.00					\$0.00	\$0.00
CG-Supplemental Services: \$0.00	.00					\$0.00	\$0.00
CG-Access Assistance: \$0.00	.00					\$0.00	\$0.00
CG-Information Services: \$0.00	.00					\$0.00	\$0.00
GP-Counsel/Suprt Grps/CG Train: \$0.00	.00					\$0.00	\$0.00
GP-Respite Care: \$0.00	.00					\$0.00	\$0.00

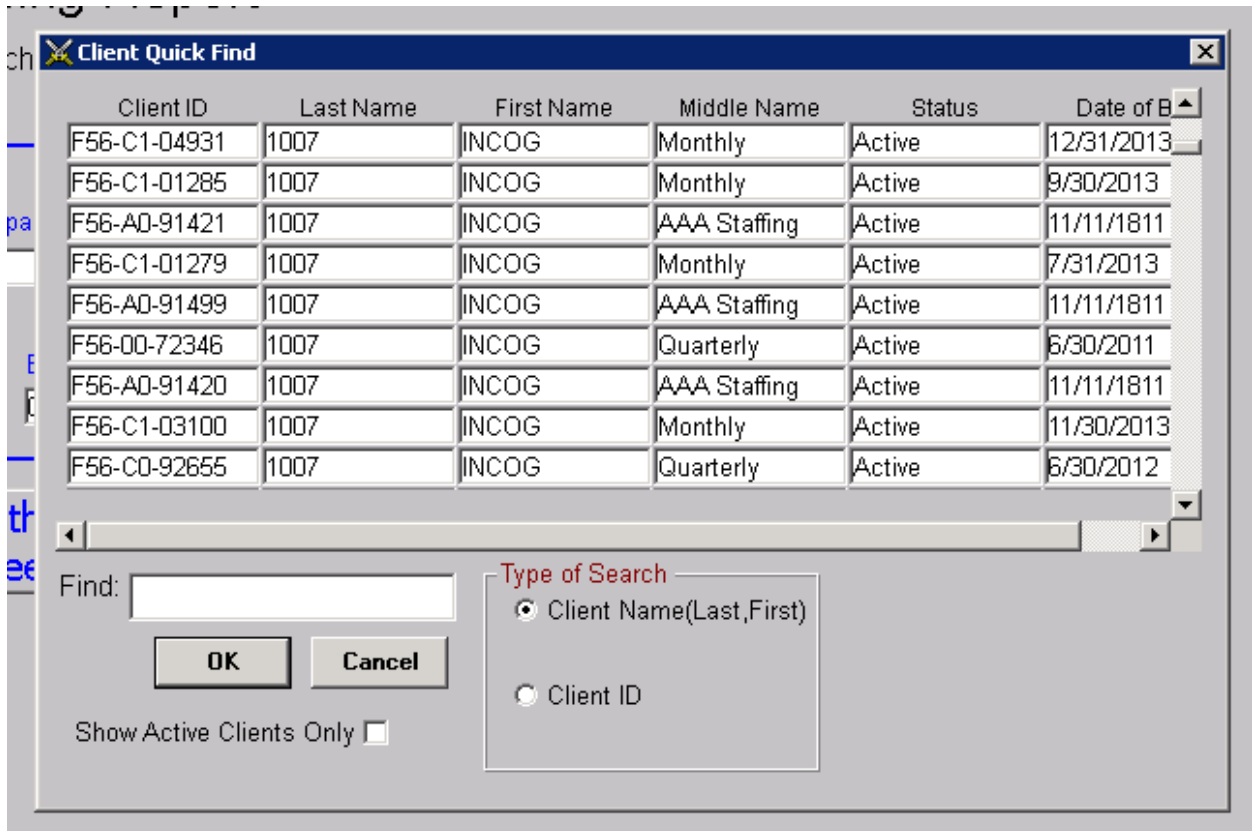
Here is where you enter you Expenditure information for a month. Note the headings of each column.

- Total Service Expenditure is all money spent on a particular service for the month regardless of the source (federal, state, local, earned, private grants, etc).
- Total Title III is an automatic calculation that adds/sums the amounts enter under B, C1, C2, D, and E. The Sum of B, C1, C2, D and E must always be equal to or less than the amount in Total Service Expenditure. If the calculated amount under Total Title III is in **Red** that means the Total Title III is greater that the Total Service Expenditure. You need to find the error in your entry and correct it.
- B, C1, C2, D, and E are the OAA Title III federal funds broken down by part. Notice that some of the fields are not available for data entry. If you need to have a particular expenditure field opened nup for data entry contact SUOA.
- Total Service Expenditure, B, C1, C2, D and E are fields where you enter money that is a Debit to your account. That is the money that you spent. Adversely, Program Income Received is where you enter money that is a credit to your account. This is money that a Particular Program earned. Or money that was given as a gift or donation in the name of a particular service program.

- When you finish entering your information, click the Save button, then the Close button in the tool bar to close the detailed data sheet. Then click the Close button in the Identification screen.

If you are making updates to your expenditure entries:

- Do not Insert a new screen.
- Open the same sheet you were already working in.



- After opening AIM, click Screens>Client>Client Info.
- On the Quick find list the DOB column corresponds with the Ending Date.
- The middle name column is the type of report (quarterly, monthly, etc).
- Click on the report for the correct ending date and click OK.

Use the Identification page to verify you are in the right S56C.

- Click the Client Custom 1 button.
- Enter the appropriate changes.
- Click the Save button then click the Close button.
- In the identification screen ensure that the Last Updated date is the current date
- Click Save and then click Close.

S56A Staffing Info

When you are ready to enter data the staffing report logon to the S56A database.

Click Screens>Client Info

The screenshot shows a window titled "Client Quick Find" with a table of client records. The table has columns for Client ID, Last Name, First Name, Middle Name, Status, and Date of Birth. Below the table are search options including a "Find:" text box, "OK" and "Cancel" buttons, a "Show Active Clients Only" checkbox, and a "Type of Search" section with radio buttons for "Client Name (Last, First)" and "Client ID".

Client ID	Last Name	First Name	Middle Name	Status	Date of Birth
F56-C1-04931	1007	INCOG	Monthly	Active	12/31/2013
F56-C1-01285	1007	INCOG	Monthly	Active	9/30/2013
F56-AD-91421	1007	INCOG	AAA Staffing	Active	11/11/1811
F56-C1-01279	1007	INCOG	Monthly	Active	7/31/2013
F56-AD-91499	1007	INCOG	AAA Staffing	Active	11/11/1811
F56-00-72346	1007	INCOG	Quarterly	Active	6/30/2011
F56-AD-91420	1007	INCOG	AAA Staffing	Active	11/11/1811
F56-C1-03100	1007	INCOG	Monthly	Active	11/30/2013
F56-C0-92655	1007	INCOG	Quarterly	Active	6/30/2012

Find:

OK Cancel

Show Active Clients Only

Type of Search

Client Name (Last, First)

Client ID

Open any record. Click the Insert button in the tool bar. Click Generate at the bottom of the search screen.

[CLICK LINK](#)

Assessment	Client Activity	Custom Screen 1	Roster by Client	Waiting List
History	Care Needs	Custom Screen 2	Owners	Income Src

Annual AAA Staffing Report

To be Completed Each October

Staffing Report Identification

Provider Name: AAA Name: Prepared By:

Select Staffing Report: Last Updated: Ending Date: (Always 30 September of the report year.)

After you complete the entries for the Staffing Report Identification
Click the Custom Screen 2 Button above

First select your AAA from the list provided when you click the down arrow next to the AAA Name field. Next select the Federal Fiscal Year from the list provided when you click the down arrow next to the Federal Fiscal Year field.

Click Save. Then click the Custom Screen 2 Quick Link button.

S56A AAA Staffing Report Details

AAA Name: Federal Fiscal year:

AAA Staff Total FTEs	AAA Staff Minority FTEs	Total Providers
<input type="text"/>	<input type="text"/>	<input type="text"/> Total Number of Providers
<input type="text"/>	<input type="text"/>	<input type="text"/> Total Number of Minority Providers
<input type="text"/>	<input type="text"/>	<input type="text"/> Total Number of Rural Providers

Functional Responsibilities
A. Planning--Includes needs assessment, plan development, budgeting/resource analysis, service inventories, standards development and policy analysis.
B. Development--Includes public education, resource development, training and education, research and development and legislative activities.
C. Administration--Includes bidding, contract negotiation, reporting, reimbursement, accounting, auditing, monitoring and quality assurance.
D. Service Delivery--Includes those activities associated with the direct provision of a service which meets the needs of an individual older person and/or caregiver.
E. Access/Care Coordinator--Includes outreach, screening, assessment, case management and I&R.

Community Focal Points and Senior Centers

<input type="text"/>	1. Total number of focal points designated under section 306(a)(3) of the Act in operation last year
<input type="text"/>	1(a). Of the total number of focal poin in item 1 above, how many were senior centers?
<input type="text"/>	2. Total number of senior centers in your PSA in the past year
<input type="text"/>	2(a). Of the senior centers in item 2 above, how many received OAA funds during the past Federal Fiscal year

The fields for the FTEs are for full-time positions only. Direct service provision are for those services that the AAA has been approved to provide directly to the consumer.

Use the down arrow next to each one to select either Yes or No. Please do not leave any blank.

Under Total Providers, Neither the number of Minority providers nor the number of Rural providers can exceed the Total Number of Providers in the top field. Under Community Focal Points and Senior Centers, the number next to 1(a) cannot exceed the number next to 1. The number next to 2(a) cannot exceed the number next to 2. When a number you enter is too high it will show in red.

Duplicate Clients

Resolving Duplicate Records

A duplicate client record occurs when a particular person's information (name, address, phone, birth date Gender, etc) is inserted into the database more than once. Duplicate records create a number of different problems in the database.

- Inaccurate un-duplicated client count.
- Services entered twice.
- Inaccurate number of services.
- Confusion about which information is correct.
- Assessments entered unnecessarily.
- Thousands of useless records that the database must evaluate every time a report is run.

Eliminating the duplicates is normally a lengthy process.

- Resolving duplicate client records begins with identification. Open AIM and run an [OKD212](#) report. This is Oklahoma's version of the SC51.

AAA Duplicates							
Unique Id	Last Name	First Name	Birth Date	Race Code	Gender	City	Provider List
T00009849:	DOE	NEEDSOME	2/28/1923	Other	Male	HOWE	9902,991:
T00010993:	DOE	NEEDSOME	2/28/1923	Other	Male	HOWE	9999

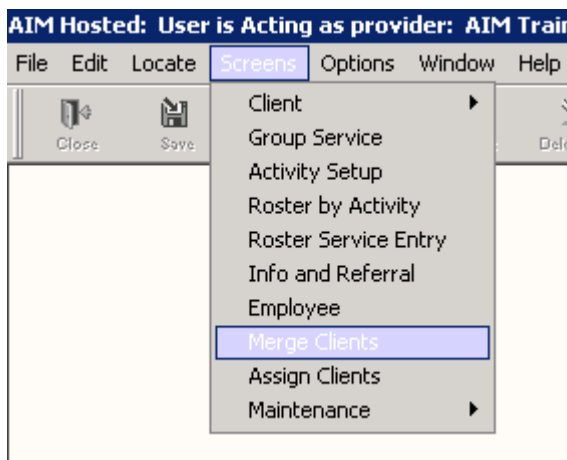
- The report shows the unique ID number, name, DOB, race, gender and city. Having the ID number is critical because it is the only way to definitely distinguish between the two. To the right of each duplicate client is a list of Provider IDs for the providers that are owners of each client. If you are not familiar with your Providers' IDs, run the [OKE301](#) report for a list of providers.
- Compare each pair of names on the report to the each of the client screens in the database to decide which one is the duplicate and needs to be removed and which one needs to be kept.
- Ensure that providers who are current owners of clients you intend to remove are promptly notified.
- Mark each client on the OKD212 report show which one to keep and which one to delete/remove.

CAUTION: A common problem here is that if a client record in use is removed there is no way for the using provider to know that it happened unless someone informs them. Rosters and reports could appear incorrect. And since the

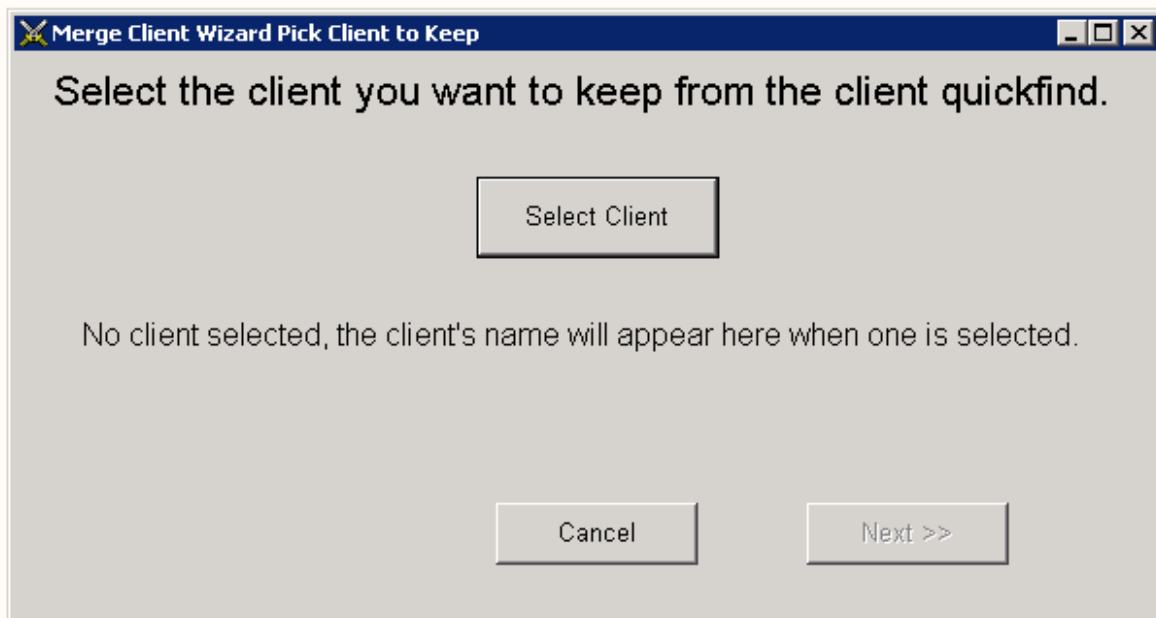
merging process leaves no trace of the removed client it can be very difficult to get the losing provider the correct information after the merge. Therefore it is essential to contact affected providers before the action takes place so that they can make the appropriate adjustments in their databases in advance. You may, if you wish, have the owning providers assist you in the reviewing process.

Critical: The ID number is the only way you have to positively distinguish between the two names.

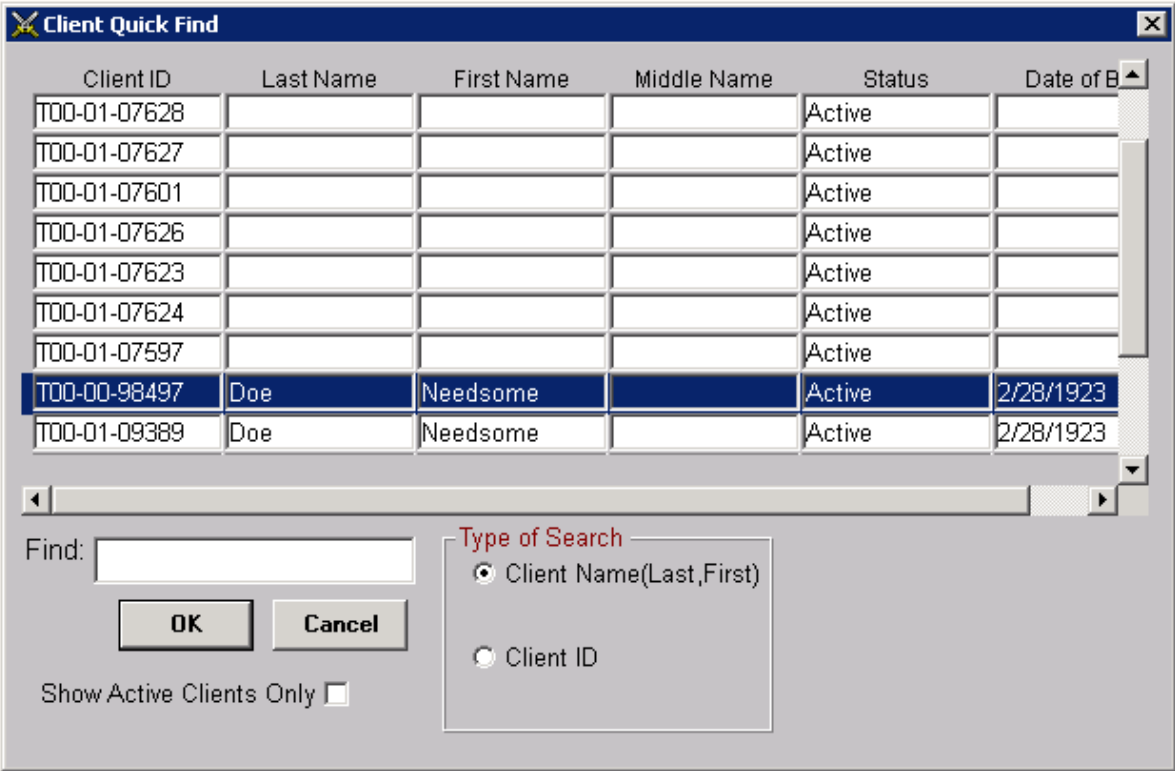
After all the pairs of names on the report have been checked and marked, it is ready for you to use the report to perform the merging process.



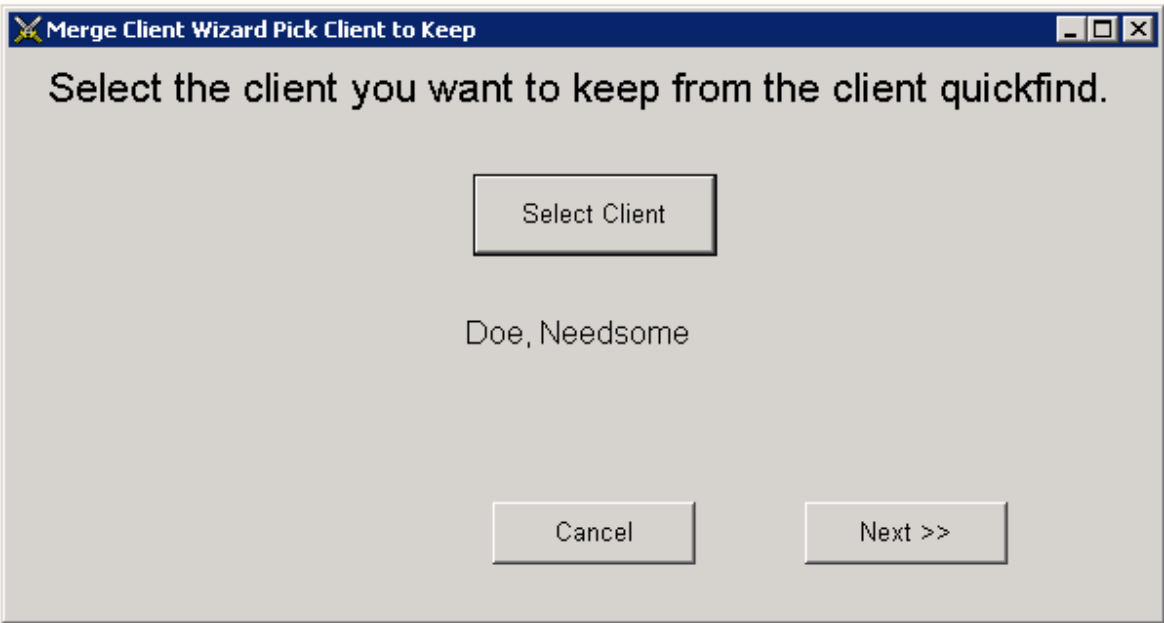
- Click Screens>Merge Clients



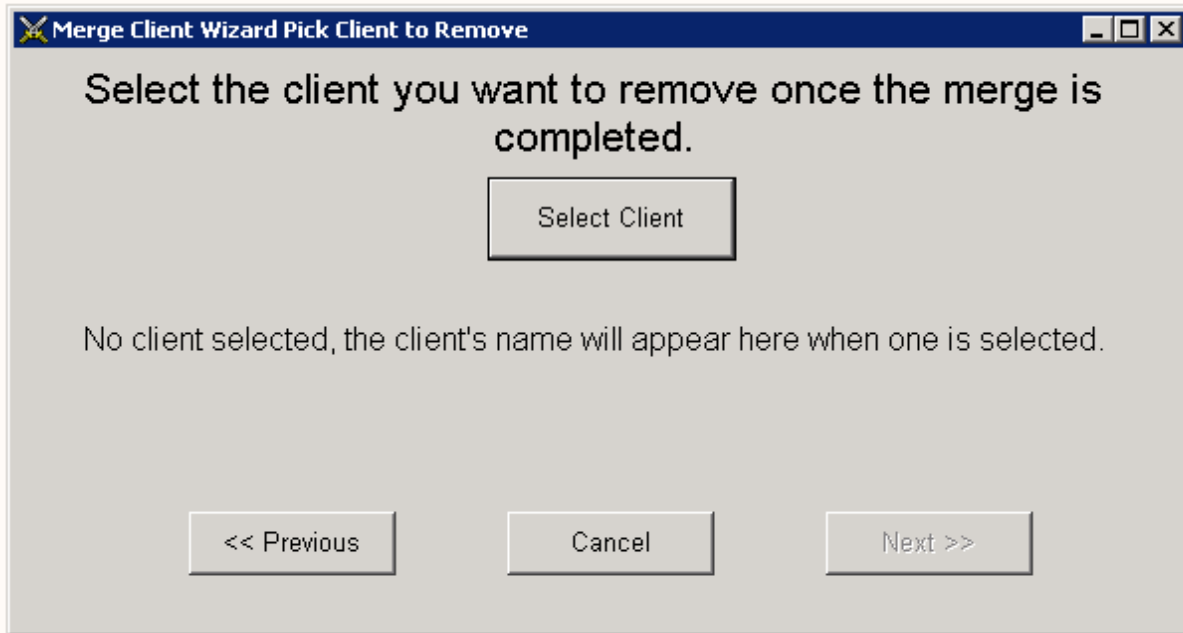
- Click Select Client



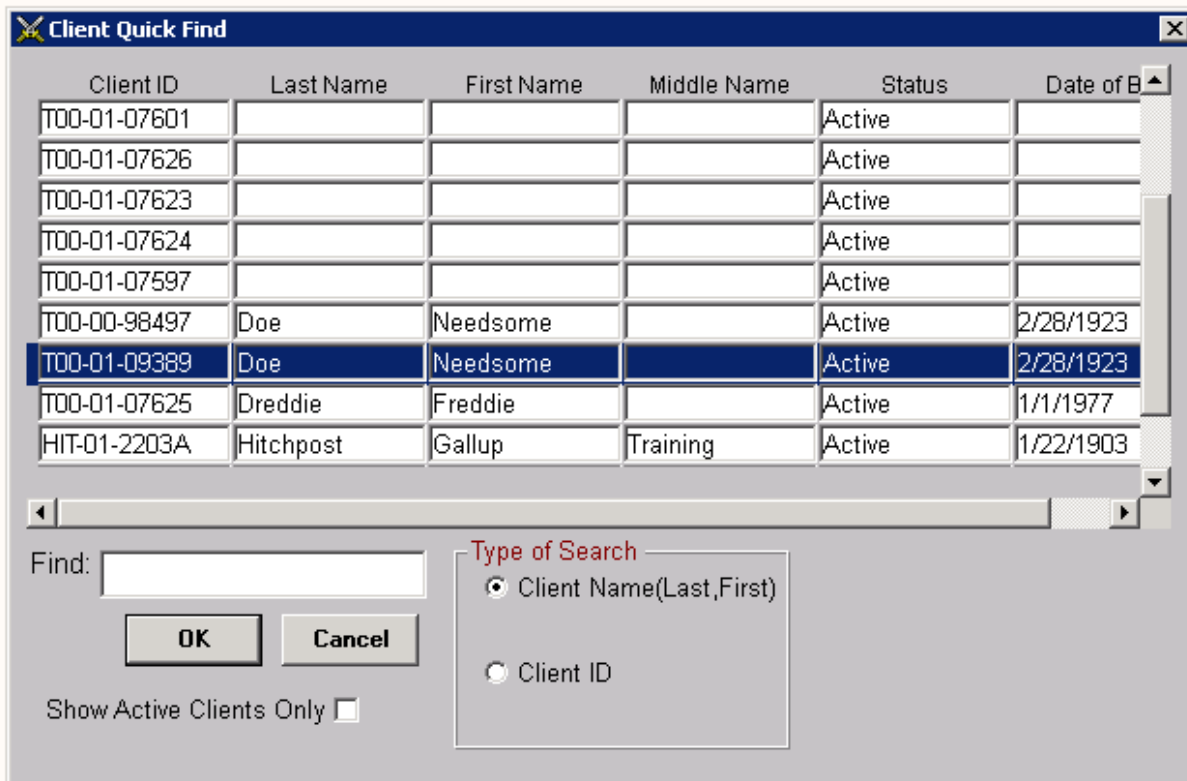
- Click on the name of the duplicate client you intend to keep.
- It is very **important that you go by the ID Number and not just the name** to ensure you are selecting the correct one.
- Click OK.



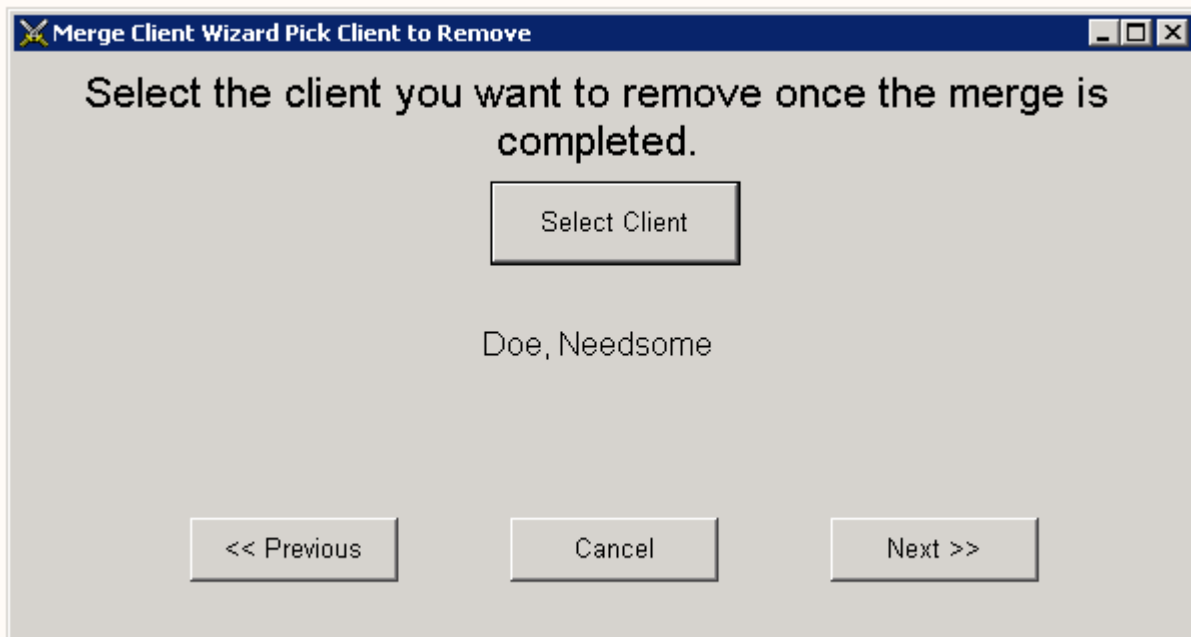
- The screen will show the name of the client you selected but not the ID. Click Next.



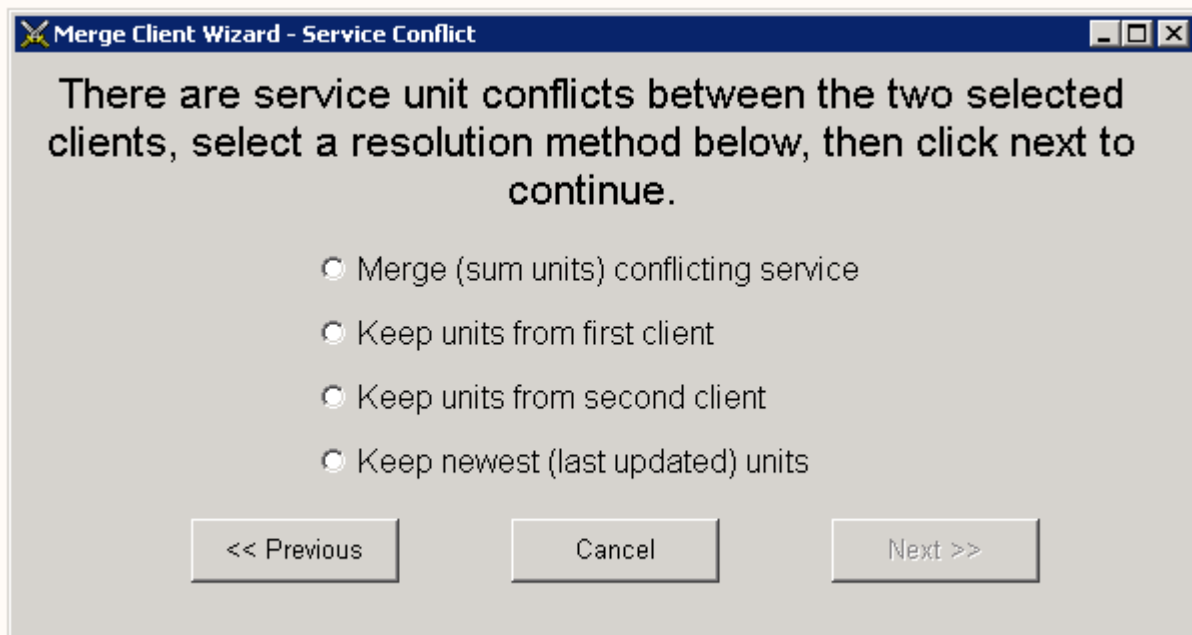
- Click Select Client.



- Click on the name of the duplicate client you intend AIM to remove when the merge process is complete.
- Click OK.



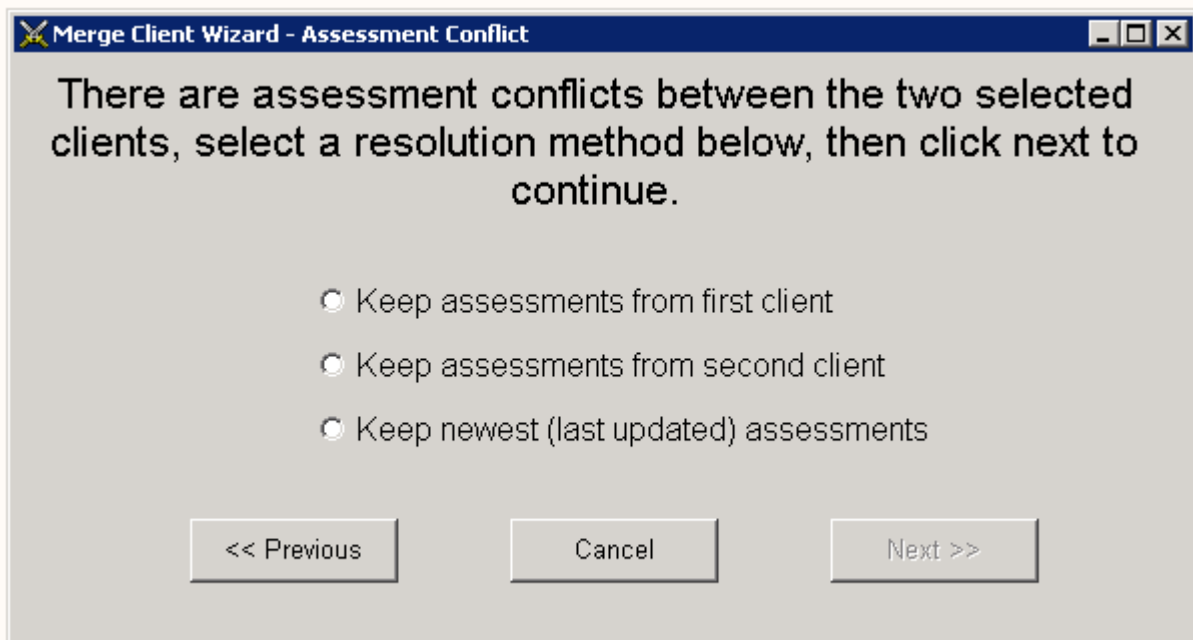
- Click Next.
- If there are no service conflicts there will be a Message stating so with the rest of the window blank.
- Click Next.



If there are service conflicts you will see this screen.

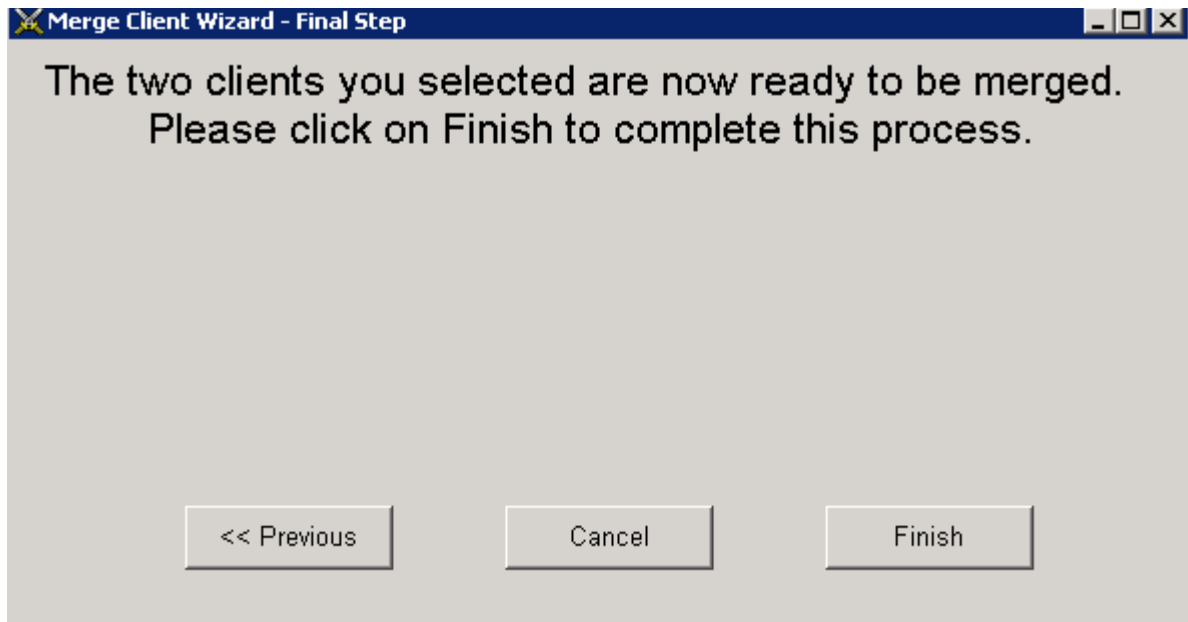
- A service conflict is when both client records were given the same service on the same date. You have four choices for dealing with the conflicts. You choose the one that will leave the most accurate information in the database.
- In most cases, service conflicts are the result of duplicate service entries. Therefore I recommend that you always use the third choice (Keep the units from the second client) which is the client you are keeping. When you click the one you want to use, click Next.

If there are no assessment conflicts, this screen will be blank.
Click Next.

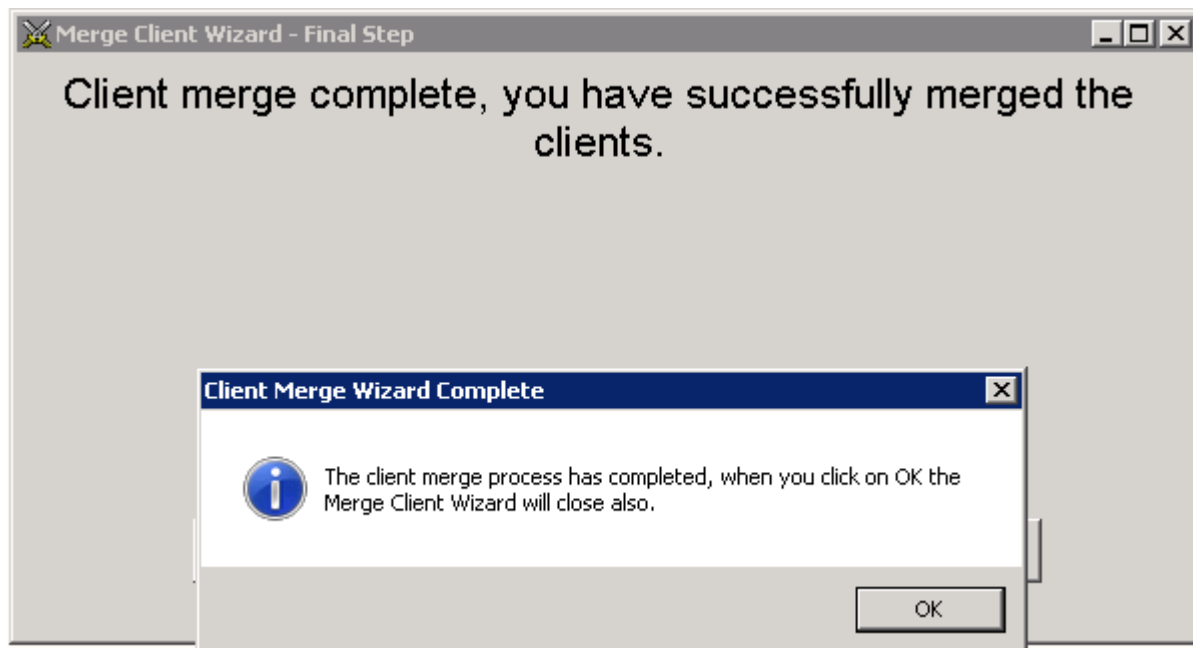


If there are assessment conflicts you will see three choices.

- An assessment conflict is when both clients records were given the same assessment date.
- I strongly recommend that you physically look at both assessment records to ensure you are keeping the most current one.
- However, a fairly good rule-of-thumb is to keep the most recently updated assessment by clicking the third choice. When you click the one you want to use, click Next.



The next screen tells you that AIM is ready to complete the merge process for the two clients selected. This is your last opportunity to make changes or to cancel the process. If you feel you have made a mistake the best thing to do is Cancel and start all over. However, you may also use the Previous buttons to return to an earlier screen. If you are satisfied with your selections, click Finish.



AIM will show a completion message box. Click OK and AIM will perform an Update Quick Find operation.

Repeat the steps to perform the next merge.

To help you track the source of duplicate clients being inserted each month the [OKD211](#) is available to you in the database. Enter a date range for the most recent full month and AIM will list new clients inserted that month which are duplicates of existing ones along the name of the AIM user who entered it.

Memos of Record

Current Memos

[Activity Naming Standard](#)
[Employee User ID](#)
[Client ID Standard Format](#)
[Standard Case required](#)
[Aggregate Client](#)
[Ineligible Clients and Services](#)
[S38](#)

Activity Naming Standard

OITU INFORMATION MEMO 2007- AIM01C

SUBJECT: Activity Naming Standard for the Oklahoma AIM Database (rev)

Effective immediately Information Memo 2007 – AIM01B is amended. AIM01C supersedes all others of the same subject. The purpose of this revision is to make activity names more distinctive in order to meet the demand for new reports. Changes are indicated *in underlined italics*.

Activity names assigned to services and service locations stored in the Oklahoma AIM database system will be formatted as follows:

The 3-character service category code

Followed by a forward slash

Followed by the numeric 2-character county code of the service location

Followed by a second forward slash

Followed by the site name when available

Followed by a third forward slash

Followed by other locally determined HOW DOES IT WORKs of the service as desired

For example, an activity name for congregate meals served to volunteers under 60 in

*Tipton would look something like this – **con/41/Carnegy/Locally determined HOW***

DOES IT WORK

This activity is for congregate meals being served in county 41 witch is Lincoln County

at the Carnegie site. The HOW DOES IT WORK after the third slash should further

describe the site with additional information. Carnegie can also be abbreviated such as

car.

The **3-character service category codes** are as follows.

a&r - Advocacy & Representation atr - Assisted Transportation
 adc - Adult Day Care adv – Advantage
 cho – Chore cmt - Case management
 cos - Coordination of Services e&t - Education & Training
 hea - Health Promotion hms – Homemaker
 hrp - Home Repair i&a - I&A
 las - Legal Assistance led - Legal Education
 med - Medication Management ned - Nutrition Education
 ncs - Nutrition Counseling out - Out Reach
 pcr - Personal Care trp – Transportation
 vol – Volunteer/Volunteer Hours

Meal Sites

con – Congregate Meals cu6 – Congregate Participants under 60
 gu6 – Congregate Guests Under 60 su6 – Congregate Staff Under 60
 vu6 – Congregate volunteers Under 60 oth – contract meals other than advantage
 hdm – Home Delivered Meals hu6 – Home Delivered Meal Participants
 Under 60
 cgm -- Home Delivered Meals (Supplemental Service)

Non Unit Activities

pre – number of meals prepared in a month
pur – number of meals purchased in a month
day – number of days in a month meals were served

Caregiver

cga - Assistance cgc - Individual Counseling cgt - Training
 cgg - Support Group cgi - Information about services
 cgr - Respite cgs - Supplemental services

Grandparents

gpa - Assistance gpc - Individual Counseling gpt - Training
 gpg - Support Group gpi - Information about services
 gpr - Respite gps - Supplemental services

The numeric **2-character county codes** are listed below.

01	Adair	27	Grant	53	Nowata
02	Alfalfa	28	Greer	54	Okfuskee
03	Atoka	29	Harmon	55	Oklahoma
04	Beaver	30	Harper	56	Okmulgee
05	Beckham	31	Haskell	57	Osage
06	Blaine	32	Hughes	58	Ottawa
07	Bryan	33	Jackson	59	Pawnee
08	Caddo	34	Jefferson	60	Payne

09	Canadian	35	Johnston	61	Pittsburg
10	Carter	36	Kay	62	Pontotoc
11	Cherokee	37	Kingfisher	63	Pottawatomie
12	Choctaw	38	Kiowa	64	Pushmataha
13	Cimarron	39	Latimer	65	Roger Mills
14	Cleveland	40	LeFlore	66	Rogers
15	Coal	41	Lincoln	67	Seminole
16	Comanche	42	Logan	68	Sequoyah
17	Cotton	43	Love	69	Stephens
18	Craig	44	McClain	70	Texas
19	Creek	45	McCurtain	71	Tillman
20	Custer	46	McIntosh	72	Tulsa
21	Delaware	47	Major	73	Wagoner
22	Dewey	48	Marshall	74	Washington
23	Ellis	49	Mayes	75	Washita
24	Garfield	50	Murray	76	Woods
25	Garvin	51	Muskogee	77	Woodward
26	Grady	52	Noble		

The content of the **locally determined HOW DOES IT WORK** is left up to the discretion of the project director.

This change comes as a result of the NAPIS Task Force’s continuing resolution to standardize activity names for Oklahoma. Providers have been using a variety of format methods to name activities which inhibited effective reporting.

Employee User ID

OITU INFORMATION MEMO 2007- AIM02

SUBJECT: Employee User ID Standard Format

Effective immediately employees’ user IDs will be assigned according to the following format for employees whose records are stored in the Oklahoma AIM database system.

The User ID is made up of the alphabetical character that matches the PSA # followed by the Provider ID and then a serialized number. For example if this employee’s PSA is 8 and Provider is Metro Transit the first assigned User ID will begin with the letter H followed by 18 and then a serial number such as 001. Additional User IDs would be H18002, H18003 and so on. User IDs are unique and may not be duplicated (See Attachment 1 for alphabetic conversions.)

Note: You may see some employee IDs that begin AAA. These are special IDs assigned only by the State Office to AAA staff members who require access to several different databases.

Remember: You will assign User ID's to only those employees who will be using the AIM database.

This change comes as a result of the Oklahoma AIM Databases being consolidated onto a website. When users where on individual standalone unconnected databases they were each able to use the same user logon ID in order to log onto the AIM database system. In the consolidated environment user IDs cannot be shared. The above format facilitates management and reporting.

Attachment 1: PSA Table

<u>AAA</u>	<u>PSA#</u>	<u>Corresponding Letter</u>
Grand gateway	1	A
EODD	2	B
KEDDO	3	C
SODA	4	D
COEDD	5	E
INCOG	6	F
NODA	7	G
Areawide	8	H
ASCOG	9	I
SWODA	10	J
OEDA	11	K

Attachment 2: Provider ID Table

Run the [OKE301](#) for a current list of providers and provider IDs

Client ID Standard Format

OITU INFORMATION MEMO 2007- AIM03A

SUBJECT: Client ID Standard Format

Effective immediately Information Memo 2007 – AIM03 is amended as follows. AIM03A supercedes all others of the same subject.

Clients' social security numbers will no longer be used as client IDs in the Oklahoma AIM database system. The only authorized format for client IDs in AIM is as follows:

The first three letters of the client's last name (in UPPER Case Format) followed by the client's 6-digit birth date. A 6-digit date is the 2-digit month followed by the 2-digit date of the month followed by the 2-digit year. For example, John Smith born 03/04/1909 will have an ID of SMI030409. Do not enter additional dashes, slashes, spaces or special characters.

The standardized format of the client ID comes as a result of the NAPIS Task Force resolution to standardize client IDs for Oklahoma. Providers have been using a variety of format methods to assign client IDs as a result of numerous elderly clients refusing to divulge their social security numbers. This practice caused considerable duplication and inaccurate reporting.

Standard Case required

OITU INFORMATION MEMO 2007- AIM04

SUBJECT: Standard Case is required For Data Entry

Effectively immediately all text data entered into the Oklahoma AIM database system will be entered in standard case format.

For example, only the first letter of a name or word will be upper case and the rest of that name or word will be lower case.

This change comes as a result of the NAPIS Task Force proposing a resolution to end a conflict between providers sharing client records. Some providers were entering data in standard case while others entered data in upper case which made reporting and sorting information ineffective.

Aggregate Client

OITU INFORMATION MEMO 2007- AIM05

SUBJECT: Aggregate Client Standard for the Oklahoma AIM Database

Effective immediately, all aggregate services will be assigned to a single aggregate client. The client ID is AGGSTATEOK. The name is Aggregate Client, Entire State. (The only exception to the above rule will be services that fall into the categories of Caregiver/Grandparent counseling, groups and training which are activities assigned to NAPIS Groups 101 or 201).

The Oklahoma NAPIS Task Force determined that the management of aggregated services will be most effective and efficient when assigned to a single aggregate client

on the database. The use of a single aggregate client by all users in the state will reduce clutter in the database and facilitate and simplify reports.

The State Office will work with each project to transfer existing aggregate services to AGGSTATEOK. However, as of this date all non-client specific services are required to be assigned to AGGSTATEOK, (with the exception of Caregiver/Grandparent group activities).

Note: If AGGSTATEOK is not on your client quick find list, open any client record, click Insert, type AGGSTATEOK click accept and then click OK at the box that tells you the client already exists and AIM will provide you access to the record for your use.

The only exception is the aggregate client used for the OKS738 (S38). See [S38](#)

Ineligible Clients and Services

OITU INFORMATION MEMO 2008 - AIM07

SUBJECT: Ineligible Clients and Services

Effective Immediately AIM users who choose to enter and store ineligible clients and ineligible services into the AIM database are responsible for ensuring that appropriate measures are taken so that ineligible clients/services are not included in state and federal reports.

Projects will meet the following minimum recommendations in reference to storing ineligible clients and services in AIM:

1. Create and use activities that will clearly distinguish between eligible services and ineligible services.
2. Ensure that only clients who are eligible to receive Title III funded services are associated with eligible activities in the database
3. Set up Activities according to the following:
 - Transfer must be set to No
 - NSIP must be unchecked
 - NAPIS Group must be one of the ineligible categories:
 - Advantage/LTCA
 - CDBG
 - Ineligible Meal Under 60 Non-OAA
 - Ineligible Services

This requirement comes as a result of the NAPIS Task Force resolution to reduce intermingling of eligible and ineligible services on state and federal reports.

S38

OITU INFORMATION MEMO 2009- AIM08(A)

SUBJECT: S38 Implementation In AIM (rev)

Effective immediately Information Memo 2009 – AIM08 is amended . AIM08(A) supersedes all others of the same subject. Changes are indicated *in underline italics*.

The following instructions apply only to Nutrition Projects. There are two sections to this memo. Section 1 is for State Office action. Section 2 is for Nutrition Project action. Sections 1 and 2 will be required to be accomplished NLT 01/01/2010.

In order to automate the s38 the following actions will have to be performed on the AIM database.

Section 1. One additional dummy client record will be created by the state office for each provider that reports meals on an s38. It will be used to store the number of meals prepared and purchased and the average number of days per month meals are served.

The first and last name will be S38 plus PROVIDER NAME. The Client ID will be S38 plus Provider name abbreviated. Please do not change the Names and IDs once they have been created.

Section 2. There will be nine additional types of activities created by providers. The format for activity names is as per instructions in IM 2007 – AIM01C. The site name must appear directly after the second slash of the activity name and be followed by a third forward slash.

Nutrition Projects will add 3 activities for each nutrition site using the following prefixes.

pre – number of meals prepared in a month

pur – number of meals purchased in a month

day – number of days in a month meals were served

The following setup criteria applies to the above three types of activities (pre, pur, day)

- Transfer set to No
- Funding set to No Funding Necessary
- NAPIS Group set to Not a Taxonomy
- NSIP Unchecked

All other parts of activity setup are the same as a normal activity

Nutrition Projects will add or modify 2 activities for each nutrition site using the following prefixes.

cu6 – congregate participants under 60

vu6 – volunteers under 60

The following setup criteria applies to the above two activities (cu6, vu6)

- Transfer set to Yes
- NAPIS Group set to Congregate Meals

- NSIP will be checked

All other parts of activity setup are the same as a normal activity

Nutrition Projects will add or modify 1 activity for each nutrition site using the following prefix.

hu6 – home delivered participants under 60

The following setup criteria applies to the above activity (hu6)

- Transfer set to yes
- NAPIS Group set to Home Delivered Meals
- NSIP will be checked

All other parts of activity setup are the same as a normal activity

Nutrition Projects will add or modify 3 activities for each nutrition site using the following prefixes.

gu6 – guests under 60

su6 – staff under 60

oth – contract meals other than advantage

The following setup criteria applies to the above three activities (gu6, su6, oth)

- Transfer set to yes
- NAPIS Group set to Ineligible Meals Under 60 Non OAA
- NSIP will be unchecked

All other parts of activity setup are the same as a normal activity

The last part of the activity name must include the site name.

For those projects that already use a similar activity such as guest or staff under 60, do not add new ones. Change the names of the existing activities.

This memo supplements Info Memo 2007 – AIM01B

This requirement comes as a result of the NAPIS Task Force decision to automate the s38 meal count report in the AIM database system.

Reports

How To Read Report Descriptions

Report descriptions are divided into seven major areas -- Identification, Purpose, User instructions, How it works, Who should review it, Related reports and a Sample.

Identification gives the report ID and title as it appears in the Reports Quick Find List.

PURPOSE

Is a brief statement about why the report is available for use.

THE USER INSTRUCTIONS

Explains the information that has to be entered such as dates, client names, provider names, activities, etc. It also includes instructions if there is special handling or interpretation.

HOW DOES IT WORK

Explains what AIM does to produce the information.

REVIEWED BY

Lists the Job Titles of the people who should be using the report to manage and make decisions.

RELATED REPORTS AND TYPES OF REPORTS

Provides hyper links to similar reports or reports that can help explain the output.

SAMPLE

A scanned image of the report.

OKA001 -- (A) Next Assess Date For Clients/Caseworkers

PURPOSE

For caseworkers to manage clients' assessment requirements

THE USER INSTRUCTIONS

Enter a date range which indicates a period of service. Then select the name of a service activity from a list.

HOW DOES IT WORK

AIM will find the clients who received a particular service during the given date range. Assessment dates are highlighted in Red as overdue when they are older than the date the report was run. It is sorted by case worker and then by client name.

REVIEWED BY

Caseworkers, Project Directors, Planners

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

List of Clients with Caseworkers and Assessment Dates

Run on: AIM Training

Run By: , Instructor

From 1/1/2013 To 10/29/2013

Red is Overdue

Caseworker	Client	Address	Assessment	
			Last	Next
Student 6,		hdm/55/ma and pas/home made bananas		
Active	Mills, Don	1 Single Lane Adair 74330	(580) -	01/01/13 06/30/13
Student12,		hdm/55/ma and pas/home made bananas		
Active	Doe, Needsome	One Buck Ln SDFSDFASDFB Shawnee 74804	(405) 129-3954	10/08/13 04/06/14
Active	Hitchpost, Gallup	212 Stable Addington 79999	(918) 639-1212	10/08/13 04/06/14

Oka003 -- (A) Assessment Dates and Client Names

PURPOSE:

To show when clients are due their next assessment.

USER INSTRUCTIONS

Select a Provider Name from the provider quick find list to determine which Provider's assessments will be displayed. Then select a NAPIS Group (Taxonomy) from a list for the type of service that clients on the list received.

HOW DOES IT WORK:

The report automatically includes only clients who received service in the previous two months. Assessment dates are highlighted in Red as overdue when they are older than the date the report was run. It is sorted by site and then by client name.

REVIEWED BY
 Project Directors, Planners, AAA Directors
 Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Monthly List of Clients and Assessment Dates
 For Clients Served 2 Months Previous the Current Month

AIM Training

Home Delivered Meals

<i>Site</i>	Name	Assessment Date	Projected Assessment Date
<i>ma and pas/</i>	Hitchpost, Gallup	04/01/2012	09/28/2012
	Mills, Don	01/01/2013	06/30/2013

OKA004 -- (A) Nutrition Question Summary by Meal Type

PURPOSE

Show the number of clients answering yes to each nutrition question and the number of clients in each risk category for each meal type..

USER INSTRUCTIONS

Enter a date range which is the period of meal service. Then select the name of a Provider from a list (that provided the services).

HOW DOES IT WORK:

AIM finds the most recent assessment for each client where nutrition questions were answered and counts the number of yes responses on each question for Home Delivered and Congregate meals. Total Clients is the total unduplicated client count for each question and risk.

REVIEWED BY

Caseworkers, Project Directors, Planners, AAA Directors
 Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Nutrition Risk Summary By Meal Type

Run By: Instructor,

Run on: AIM Training

Meal Type	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10	High	Moderate	Low
Home Delivered Meals	13	12	2	9	7	5	12	6	0	3	11	9	5
Total Clients:	13	12	2	9	7	5	12	6	0	3	11	9	5

OKA005 -- (A) Nutrition Questions (per client) by Meal Type

PURPOSE

Show the clients' answers to each nutrition question and nutrition risk assigned for each meal type..

USER INSTRUCTIONS

Select a provider name from a list for meal provided of the report. Then enter a date range for the period of time meals were provided.

HOW DOES IT WORK

Under the Report title the name of the user running the report followed by the name of the provider whose clients' assessments were used to collect the nutrition answers.

Under meal type will be either home delivered or congregate meals or both. The number is the number is the score recorded for the way the question was answered.

Values above zero were answered yes. Total is the number of all yes responses for each question. Risk grade is set according to established nutrition risk rating scale.

REVIEWED BY

Caseworkers, Project Directors, Planners

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Individual's Nutrition Risk By Meal Type

Run On: AIM Training

Run By: Instructor,

	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Total	Risk Grade		
Home Delivered Meals														
Doe, Needsome	0	0	0	0	0	0	0	0	0	0	0	L		
Hitchpost, Gallup	0	3	0	0	2	0	1	1	0	0	7	H		
Phipps, Loren	0	0	0	0	0	0	0	0	0	0	0	L		
												L	M	H
Total Yes For Home Delivered Meals:	0	1	0	0	1	0	1	1	0	0	Total Type Risk:	2	0	1

OKA006 -- (A) Unanswered Assessment Questions for a Client

PURPOSE

To list the Functional, Nutrition, ADL and IADL questions for which answers were not entered into the database on an assessment.

USER INSTRUCTIONS

Select the name of the provider that entered the assessment from a list followed by the name of the client whose assessment is being viewed, also selected from a list.

HOW DOES IT WORK

The information is grouped by question category. Categories and unanswered questions appear on the report in the same sequence they are on the AIM assessment screen. Reviewers will compare this report to the most recent intake form to ensure that all available information is entered into the database.

REVIEWED BY

Caseworkers, Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

:
SAMPLE

Assessment Questions Not Answered

For Gallup Hitchpost, Female Age: 110

<u>Category</u>	<u>Question</u>
Activities of Daily Living (ADL)	
	Money Mgmt
	Prepare Meals
	Shopping
	Medication Mgmt
	Heavy Housekeeping
	Transportation
	Light Housekeeping
	Telephone Use
Nutritional Health	
	Eat Few Fruits or Veg. or Milk products/day
	Lost/Gained 10+ lbs In 6 mo
	Not always able to shop or cook or feed self.

OKA007 -- (A) Assessment Details and Client Info

PURPOSE

To review a client's latest assessment results

USER INSTRUCTIONS

Select a client name from the client quick find list.

HOW DOES IT WORK

AIM displays the client's most recent assessment entered by the current Provider. Use this in conjunction with service and referral reports to evaluate how well a client is being taken care of. Reviewers will run this report on clients with overdue assessments. Field Reps typically use this report to prepare for site visits.

REVIEWED BY

Caseworkers, Project Directors, Planners

RELATED REPORTS AND TYPES OF REPORTS

[OKA001](#). [OKA003](#), [OKA012](#)

SAMPLE

Client Information and Assessment Details

AIM Training

Client ID	Name	Minority Status	Birth Date	Gender	Last Assessment
Hit012203	Hitchpost, Ga	Asian, Non-Hisapnic	1/22/1903	F	10/8/2013
Married: Unknown		Spouse:		Case Worker: Student12	
Special Eligibility:		# in Household: 1		CareReceiver <input checked="" type="checkbox"/>	CareGiver <input type="checkbox"/>
Mailing Address: 212 Stable, Addington, OK 79999				Home Phone: 9186391212	
County: Jefferson				Contact Phone:	
Rural Area <input type="checkbox"/>				Contact Name:	
				Contact Relationship:	

Latest Detailed Assessment Information

Intake Supplemental

Marital Status?, Widowed
 Household Composition?, Alone
 Poverty?, Below

Nutritional Health

Illness made change in amount or kind of food, No (0)
 Fewer than 2 meals/day, Yes (3)
 Drink 3 or more beers or liquor or wine/day, No (0)
 Tooth/Mouth makes hard to eat, Yes (2)
 Not always enough money to buy food, No (0)
 Eat alone most of time, Yes (1)
 Take 3 or more prescribed or OTC drugs/day, Yes (1)

Activities of Daily Living (ADL)

Dressing, Can't do at all (3)
 Bathing, Can't do at all (3)
 Eating, Some assist/supervision (2)
 Transferring, Can't do at all (3)
 Toileting, Some assist/supervision (2)
 Walking, Can't do at all (3)

Instrumental Activities of Daily Living (IADL)

Shopping, Can't Do at All

Client Signature _____ Date: _____

Assessor Signature _____ Date: _____

OKA008 -- (A) Individual Assessment Details for Current Provider

PURPOSE

To review a client's latest assessment results

USER INSTRUCTIONS

Select a client name from the client quick find list. Then select a Provider from the Provider quick find list.

HOW DOES IT WORK

AIM displays the client's most recent assessment entered by the selected Provider. See the OKA007 for more specific details.

REVIEWED BY

Caseworkers, Project Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

Service and Assessment reports

SAMPLE See sample for [OKA007](#)

OKA009 -- (A) Individual Assessment Details for any Provider

PURPOSE

To review a client's latest assessment results

USER INSTRUCTIONS

Select a client name from the client quick find list.

HOW DOES IT WORK

AIM displays the client's most recent assessment regardless of which Provider entered it. See the OKA007 for more specific details.

REVIEWED BY
Caseworkers, Project Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS
Service and Assessment reports

SAMPLE: For sample see [OKA007](#)

OKA010 -- (A) Individual Assessment Details for a Particular Provider

PURPOSE
To review a client's latest assessment results

USER INSTRUCTIONS
Select a client name from the client quick find list. Then select a Provider from the Provider quick find list.

HOW DOES IT WORK
AIM displays the client's most recent assessment for the selected Provider. See the OKA007 for more specific details.

REVIEWED BY
Caseworkers, Project Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE: For sample see [OKA007](#)

OKA011 -- (A) Individual Assessment Details For a Particular Provider and Date

PURPOSE
To review a client's latest assessment results

USER INSTRUCTIONS

Select a client name selected from the client quick find list for the client whose assessment information will be displayed. Then select a Provider name from the provider quick find list. Then enter the Assessment Date of the particular assessment to view.

HOW DOES IT WORK

AIM displays the client's most recent assessment of the Provider selected and date entered. It will be helpful to know ahead of time which Provider's assessment and which date you want to view. If you select a provider or date that has no assessment for the client you selected AIM will not display any information.

REVIEWED BY

Caseworkers, Project Directors

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

See the OKA007 for more specific details.

SAMPLE: For a sample see [OKA007](#)

OKA012 -- (A) Clients Grouped by Assessment Date/Provider

PURPOSE:

to get a clients' contact information based on the latest assessment date. The name of the responsible Provider is available in case there are questions about the assessment.

USER INSTRUCTIONS a date range for an assessment period to be searched, a NAPIS Group (type of Service that clients received) select from a list, and a AAA which is the primary service area of the providers being displayed also selected from a list.

HOW DOES IT WORK

Under the report title is the NAPIS Group. Client information is grouped and sorted by assessment dates and provider names.

RELATED REPORTS AND TYPES OF REPORTS

The OKA007 and similar reports, and the OKA003.

REVIEWED BY

Caseworkers, Project Directors, Planners

SAMPLE:

Clients Listed By Latest Assessment and Provider Responsibility
Home Delivered Meals

Name	DOB	Gender	Address	Phone
Assessment Date: 10/08/2013				
Provider: Student 12				
Hitchpost, Gallup	01/22/1903	Female	212 Stable Addington 79999	(918) 639-1212
Assessment Date: 01/01/2013				
Provider: AIM Training				
Mills, Don	01/01/1745	Male	1 Single Lane Adair 74330	(580) -
Doe, Needsome	02/28/1923	Male	One Buck Ln Shawnee 74804	(405) 129-3954

OKA013 -- (A) Clients with Assessment Date/Provider Listed

PURPOSE

to get a clients' contact information based on the latest assessment date.

USER INSTRUCTIONS a date range for assessment period to be searched, a NAPIS Group (type of Service that clients received) select from a list, and a AAA which is the primary service area of the providers being displayed also selected from a list.

HOW DOES IT WORK

The second line under the name is the date of the last assessment and the ID number of the Provider that entered the assessment. It is sorted by client name.

RELATED REPORTS AND TYPES OF REPORTS

[OKA003](#), [OKA007](#), [OKE301](#)

REVIEWED BY

Caseworkers, Project Directors, Planners

SAMPLE:

Clients Listed By Latest Assessment and Provider Responsibility
Home Delivered Meals

Name	DOB	Gender	Address	Phone
Doe, Needsome 2013-01-01(9999)	02/28/1923	Male	One Buck Ln Shawnee 74804	(405) 129-3954
Hitchpost, Gallup 2013-10-08(9912)	01/22/1903	Female	212 Stable Addington 79999	(918) 639-1212
Mills, Don 2013-01-01(9999)	01/01/1745	Male	1 Single Lane Adair 74330	(580) -

OKA016 -- (A) Assessment Dates for Clients not Served

PURPOSE:

To show when clients are due their next assessment.

USER INSTRUCTIONS

Select a Provider Name from the provider quick find list to determine which Provider's assessments will be displayed.

HOW DOES IT WORK:

The report automatically includes only clients who received service in the previous two months. Assessment dates are highlighted in Red as overdue when they are older than the date the report was run. It is sorted by site and then by client name. Field Reps typically use this report to prepare for site visits.

REVIEWED BY

Caseworkers, Project Directors, Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

[OKA005](#), [OKA007](#), [OKA012](#)

SAMPLE

List of Clients and Assessment Dates For Clients Not Served

AIM Training

Name	Assessment Date	Projected Assessment Date
Doe, Needsome	03/03/2014	08/30/2014

OKA017 -- (A) Assessment Data for a Single Client

PURPOSE

To list the Functional, Nutrition, ADL and IADL questions that were answered. A Modification of the OKA007 to include Route and Schedule information.

USER INSTRUCTIONS A client name by selecting from the client quick find.

HOW DOES IT WORK

Just under the tile is the meal route and delivery schedule. Personal information is limited. Will include Care Needs information if entered into the database.

REVIEWED BY

Caseworkers, Project Directors, Planners,

RELATED REPORTS AND TYPES OF REPORTS

[OKA001](#), [OKA007](#), [OKA012](#)

SAMPLE

Data for a Single Client AIM Training					
Route:		Schedule:			
SSN:	Name:	DOB:	SEX:	Status:	Status Date:
000-00-14682	Doe, Needsome Train	02/28/1923	Male	Active	9/19/2006
Spouse: _____			E Contact Phone: (555) 555-5555		
Address: One Buck Ln			E Contact Name: dsskdjn		
SDFSDFA SDFB			E Contact Relationship: bbbbbb		
City: Shawnee			Assessor: _____		
State: Oklahoma		Zip Code: 74804-	Case Worker: Student12,		
County: Pottawatomie		Rural Area: <input type="checkbox"/> Region: 8	Doctor Name: _____		
Work Phone: (405) -		Consent Release: No	Operator: _____		
Home Phone: (405) 129-3954		Total Income: _____			
Assessment Criteria:			10/8/2013		
Category Description:	Question:	Answer:			
Activities of Daily Living (ADL) Bathing		Can't do at all (3)			
Activities of Daily Living (ADL) Toileting		Some assist/supervision			
Activities of Daily Living (ADL) Transferring		No assistance (0)			
Additional Questions	Been released from the hospital or long term care facility in last 10 days?	No			
Additional Questions	Does consumer live alone	Yes			
Additional Questions	High nutrition score of 6+	Yes			
In-home service determinator	Is assistance required in order to leave home (homebound)?	No			
Instrumental Activities of Daily	Chores	Some Assistance or Supe			
Instrumental Activities of Daily	Managing Money	Can't Do at All			
Instrumental Activities of Daily	Medication Management	Can't Do at All			
Instrumental Activities of Daily	Preparing Meals	Some Assistance or Supe			
Instrumental Activities of Daily	Shopping	Some Assistance or Supe			
Instrumental Activities of Daily	Transportation Ability	Some Assistance or Supe			
Instrumental Activities of Daily	Using Telephone	Some Assistance or Supe			
Intake Supplemental	Directions to Home?	Yes (Click the Other Info E			
Signature Page	Attachment A completed	Yes			
Care Needs					
Created On	Need	Activity/Service	Units	Start Date	Provider Name
08/29/2013	Bed Riddin	Disability Evaluation		09/06/2012	Student 7
08/29/2013	Wheel Chair	Chili Con Artist		08/05/2013	Pop's Chili Fixins

OKA018 -- (A) Latest Assessments

PURPOSE

Used to get a list of clients assessed by a provider other than the service provider

USER INSTRUCTIONS

Enter a date range for a period of assessment. Select the name of the Provider that is providing the service.

HOW DOES IT WORK

AIM lists the clients that have an assessment entered during the given date range and that have a service from the selected Provider. The Provider at the right end of the line entered the assessment.

REVIEWED BY

Caseworkers, Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

[OKA003](#), [OKA007](#)

Latest Assessments Entered for: AIM Training

Name	Address	DOB	Gender	Assessed Date	Next Assessment	Assessing Provider
Hitchpost, Gallup	212 Stable, -- 79999	01/22/1903	Female	3/3/2014	8/30/2014	State of Oklahoma

OKC100 -- (C) Clients And Addresses For A Roster

PURPOSE

To list the names and addresses of clients on a particular roster.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Then select one or more activity name(s) from the activity quick find list.

HOW DOES IT WORK

The report operates exactly like the other activity rosters. When more than one activity is selected it is grouped and sorted by activity name and then sorted by client name.

REVIEWED BY

Caseworkers, Project Directors, Planners

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Activity Roster for: AIM Training			
Act: hdm/55/ma and pas/ho Grp: AIM Training Pgm: AIM Training FS:- NAPIS: Home Delivered Meals			
Name	Address	Phone	Age
Doe, Needsome	One Buck Ln Shawnee 74804	(405) 129-3954	90
Hitchpost, Gallup	212 Stable Addington 79999	(918) 639-1212	110

OKC101-- (C) Sign In Sheet

PURPOSE

A participant sign-in roster primarily for meal sites.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Then select one or more activity names from the activity quick find list.

HOW DOES IT WORK

Operates exactly like other activity rosters.


REVIEWED BY

Caseworkers, Project Directors

RELATED REPORTS AND TYPES OF REPORTS

Activity rosters [OKS700](#)

SAMPLE

Activity Roster for: AIM Training				
Act: hdm/55/ma and pas/ho Grp: AIM Training Pgm: AIM Training FS:- NAPIS: Home Delivered Meals				
Start Date:	Instructor:	Act Barcode: 		
	Signature	Meal Reservation	Over 60	Under 60
Doe, Needsome	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hitchpost, Gallup	_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OKC102 -- (C) Sign In Sheet (Weekly Legal Size)

PURPOSE

A participant sign-in roster for meal sites.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Then select an activity name selected from the activity quick find list.

HOW DOES IT WORK

Prints on Legal size paper. See the OKC101 for more specific details.

REVIEWED BY

Caseworkers, Project Directors

SAMPLE: [OKC101](#)

OKC103 -- (C) Sign In Sheet (Weekly) (No Age)

PURPOSE

Participant sign-in roster for meal sites.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Then select an activity name selected from the activity quick find list.

HOW DOES IT WORK

Operates exactly like other activity rosters.

REVIEWED BY

Caseworkers, Project Directors

RELATED REPORTS AND TYPES OF REPORTS

Activity rosters [OKS700](#)

SAMPLE

Activity Roster for: AIM Training		
Act: hdm/55/ma and pas/ho Grp: AIM Training Pgm: AIM Training FS:- NAPIS: Home Delivered Meals		
Date:	Signature	Meal Reservation
Doe, Needsome	_____	<input type="checkbox"/>
Hitchpost, Gallup	_____	<input type="checkbox"/>

OKC104 -- (C) Caregivers with Care Receivers List

PURPOSE

To review the relationship between a care giver and care receiver.

USER INSTRUCTIONS

Select a provider name from the provider quick find list.

HOW DOES IT WORK

AIM lists Caregivers that belong to a particular Provider and sorts them by Caregiver name.

REVIEWED BY

Caseworkers, Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

Service and Assessment Reports

SAMPLE:

Caregivers and their Care Receivers		
AIM Training		
Caregiver Name	Care Receiver Name	Relationship
Doe, Needsome	Hitchpost, Gallup	Son/Son-in-Law

OKC105 -- (C) Caregivers with Care Receivers W/Addresses

PURPOSE

To view the residential addresses of Caregivers and their Care Receivers.

USER INSTRUCTIONS

Select a provider name selected from the provider quick find list

HOW DOES IT WORK

AIM locates Caregivers for the Provider selected. Each record is three lines. First caregiver information, then care receiver information then the relationship.

REVIEWED BY

Caseworkers, Project Directors

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

Service and Assessment reports

SAMPLE:

Caregivers and their Care Receivers				
AIM Training				
Name	Address	Birth Date	Phone	Gender
CareGiver: Doe, Needsome	One Buck Ln, Shawnee, OK 74804	2/28/1923	(405) 129-3954	Male
Care Receiver: Hitchpost, Gallup	212 Stable, Addington, OK 79999	1/22/1903	(918) 639-1212	Female
Relationship: Son/Son-in-Law				

OKC106 -- (C) Sign-In Sheet No Age (Reversed 103)

PURPOSE

Provide a sign-in sheet for meal participants

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Then select an activity name selected from the activity quick find list.

HOW IT WORKS

Operates exactly like activity rosters and other sign-in sheets. Field Reps typically use this report to prepare for site visits.

REVIEWED BY

Caseworkers, Project Directors

RELATED REPORTS AND TYPES OF REPORTS

Activity rosters [OKS700](#)

SAMPLE

Activity Roster for: AIM Training		
Act: con/22/Deep Kettle/ Grp: AIM Training Pgm: AIM Training FS:- OAA-IIIC1 NAPIS: Congregate Meals		
Date:	Meal Reservation	Signature
Doe, Needsome	<input type="checkbox"/>	_____

Hitchpost, Gallup	<input type="checkbox"/>	_____

OKC107 -- (C) Care Receivers W/O Caregivers

PURPOSE

To identify clients that either need to be removed from the care receiver list or assigned to a care giver.

USER INSTRUCTIONS

Select a provider name select from the provider quick find. Open each associated client record and either assign a caregiver and relationship or remove the check from the Care Receiver box. Although anyone can run this report, only a designated caregiver coordinator can take the appropriate action in the database.

HOW DOES IT WORK

Aim finds client records that have Care Receiver checked that do not have an assigned caregiver. The report is sorted by client name.

REVIEWED BY

Caseworkers, Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

Service and Assessment reports

SAMPLE

**List of Care Receivers with no Caregiver Assigned
AIM Training**

Name	Address	Phone
Mills, Don	1 Single Lane Adair, OK 74330	(580) -
Phipps, Loren	4001 Corn Drive Bartlesville, OK 74006	() -
Smith, Joe	000 Sleepy Lane Nappie, OK 76543	(580) 537-631

OKC108 -- (C) Clients With Services

PURPOSE

To review the services clients have received.

USER INSTRUCTIONS

Enter a date range which is the period of service.

HOW DOES IT WORK

AIM lists Site Name, Service Type and client name in that order.

REVIEWED BY

Caseworkers, Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

Assessment reports, Activity Rosters

SAMPLE

Clients With Services For: AIM Training

From: 1/1/2013 To: 10/30/2013

<u>Name</u>	<u>Age</u>	<u>Gender</u>	<u>Address</u>	<u>Last Served</u>
Site: ma and oas				
Home Delivered Meals				
Doe, Needsome	90	M	One Buck Ln Shawnee	03/05/2013
Hitchpost, Gallup	110	F	212 Stable Addington	08/01/2013
Mills, Don	268	M	1 Single Lane Adair	08/01/2013
Site: Stooo Repair an				
Chore				
Phipps, Loren	50	F	4001 Corn Drive Bartlesville	09/26/2013

OKC109 -- (C) Clients by Provider and Service (Active)

PURPOSE

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Enter a date range for the period service. Select a NAPIS group (Taxonomy) the list which is the type of service for which you want people selected.

HOW DOES IT WORK

The total clients is the number of people listed on the report. The list is sorted by client name and only for clients with an Active status.

REVIEWED BY

Caseworkers, Project Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Alphabetical Active Client Report for: Home Delivered Meals

AIM Training

Total Clients this Provider: 5

Name	Address	City, State Zip & County	Home Phone	DOB
Doe, Needsome	One Buck Ln	Shawnee, OK 74804 Pottawatomie	(405) 129-3954	2/28/1923
Hitchpost, Gallup	212 Stable	Addington, OK 79999 Jefferson	(918) 639-1212	1/22/1903
Mills, Don	1 Single Lane	Adair, OK 74330 xdf.kusdb	(580) -	1/1/1745
Phipps, Loren	4001 Corn Drive	Bartlesville, OK 74006 Washington	() -	12/15/1962
Smith, Joe	000 Sleepy Lane	Nappie, OK 76543 Cotton	(580) 537-6319	6/30/1955

OKC110 -- (C) Clients by County and City

PURPOSE

To review the county of residence

USER INSTRUCTIONS

Select a provider name from the provider quick find list. When county or address information is incorrect, open the the appropriate client record and make corrections.

HOW DOES IT WORK

AIM finds clients that received service from the selected Provider. No county indicates the county field is blank for a client's record. The list is sorted by county name then client name.

Field Reps typically use this report to prepare for site visits.

REVIEWED BY

Caseworkers, Project Directors, Planners

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Alphabetic List of Clients by County and City						
AIM Training						
Name	Address	Phone	Status	CR	CG	Age
County						
,	, OK	(580) -	Active	<input type="checkbox"/>	<input type="checkbox"/>	
test, test	, OK	(580) -	Pending	<input type="checkbox"/>	<input type="checkbox"/>	201
Cleveland County						
Mills, Don	413 W. ALMOND LEXINGTON, OK 73051	(405) 527-8597	Active	<input type="checkbox"/>	<input type="checkbox"/>	64
Cotton County						
Smith, Joe	000 Sleepy Lane Nappie, OK 76543	(580) 537-6319	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	58
Jefferson County						
Hitchpost, Gallup	212 Stable Addington, OK 79999	(918) 639-1212	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	110
Kay County						
Smith, Don	115 N. Pine St. Longdale, OK 73755	(580) 274-3296	Active	<input type="checkbox"/>	<input type="checkbox"/>	70
Mayes County						
Doe, Needsome	Adair, OK 74330	(580) -	Inactive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	90
Oklahoma County						
mills, joe	Oklahoma City, OK 73107	(580) -	Inactive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-917
Pottawatomie County						
Doe, Needsome	One Buck Ln Shawnee, OK 74804	(405) 129-3954	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	90
Washington County						

OKC111 -- (C) Minority Clients Over 60 In Poverty

PURPOSE

USER INSTRUCTIONS

Enter a date range for a period of service. Select a provider name from the provider quick find list. Select an activity name from the activity quick find list.

HOW DOES IT WORK

AIM finds 60 year old clients living under poverty that received the service selected, from the provider selected during the time entered and lists them by activity and race.

REVIEWED BY

Caseworkers, Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

Assessment Reports

SAMPLE

List of High Risk Minority Clients 60 and Older Living Under Poverty

AIM Training

Last Assessment	Name	Address	Birth Date	Gender	Is Hispanic	Score
	<i>hdm/55/ma and pas/home made bananas</i>					
	Asian					
10/8/2013	Hitchpost, Gallup	212 Stable Addington 79999	1/22/1903	Female	<i>Hispanic</i>	63

OKC112 -- (C) Clients by Service Activity and Service Date (W/Deletes)

PURPOSE

To ensure that the names and units of a completed activity roster were correctly entered into AIM

USER INSTRUCTIONS

Select an activity name from the activity quick find list. Enter a date range for the period of service. Compare the list to the associated activity roster to find clients on the roster that are not in this report or to find clients non this report that are not on the roster.

When there are discrepancies between the C112 and an activity roster, open a client's service record to make corrections.

HOW DOES IT WORK

Aim finds the clients that have service entries for the service selected and dates entered. The list includes clients that have been deleted by the Provider.

REVIEWED BY

Site Directors, Project Directors

RELATED REPORTS AND TYPES OF REPORTS

Activity rosters, [OKS738](#), [OKN509](#) and related reports

SAMPLE

Client and Service Units List by Activity and Date			
AIM Training			
hdm/55/ma and pas/home made bananas			
Unduplicated Count of Clients is 3			
			From 01/01/2013
			To 10/30/2013
Ssn	Name	Units	Service Date
0000014682	Doe, Needsome	3.00	3/5/2013
HIT012203A	Hitchpost, Gallup	1.00	8/1/2013
T000067945	Mills, Don	1.00	8/1/2013
Sum Units Total:		5.00	

OKC113 -- (C) Clients and Addresses by Activity

PURPOSE

To list clients and their street addresses that received a particular service.

USER INSTRUCTIONS

Select one or more activities from a list. Enter dates for the service date range.

HOW DOES IT WORK

Aim finds clients that received the service selected during the period of time entered.

REVIEWED BY

Caseworkers, Project Directors, Planners

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Client Addresses by Activity

AIM Training

Name	Address	Phone
hdm/55/ma and pas/home made bananas		
Doe, Needsome	One Buck Ln Shawnee 74804	(405) 129-3954
Hitchpost, Gallup	212 Stable Addington 79999	(918) 639-1212
Mills, Don	1 Single Lane Adair 74330	(580) -

OKC114

INFORMATION USER INSTRUCTIONS

OKC115 -- (C) ADvantage Client's Service Schedule

PURPOSE

To view the begin and end dates of clients' ADvantage service schedules

USER INSTRUCTIONS

Enter dates and select a Provider from the list.

HOW DOES IT WORK

AIM searches clients that have the Advantage box checked and provides each client's Advantage program schedule.

REVIEWED BY

Project Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

ADvantage Client's Service Schedule							
AIM Training							
Name	City/Zip	Birth/Age	Gender	Phone	ADvantage Schedule		
					Begin	End	
Hitchpost, Gallup	-- 79999	01/22/1903 111	Female	(918) 639-1212	00/00/0000	00/00/0000	

OKC116

INFORMATION USER INSTRUCTIONS

OKC117 -- (C) Clients Deleted by a Provider

PURPOSE

To view a list of clients deleted by a Provider who received service during a certain period of time.

USER INSTRUCTIONS

A provider name selected from the provider quick find list. If while running other list reports you believe someone is missing, run the 117.

HOW DOES IT WORK

AIM checks for clients with a service from the Provider selected that no longer belong to the Provider selected..

REVIEWED BY

Caseworkers, Project Directors

RELATED REPORTS AND TYPES OF REPORTS

OKS738, OKC112, Activity Rosters, Assessment reports

SAMPLE

List of Deleted Clients

AIM Training

From: 1/1/2013 To: 10/30/2013

Client ID	Name	Address	Last Served
Phi121562	Phipps, Loren	4001 Corn Drive Bartlesville	09/26/13

OKC118 -- (C) Sample List of Clients

PURPOSE

To view a sample list of clients for a particular service

USER INSTRUCTIONS

Select a Provider name from the provider quick find list. Select a NAPIS Group (Taxonomy) from a list. Enter dates for the period of service. Enter a number for AIM to use to select every Nth client

HOW DOES IT WORK

AIM produces a list of the clients that appeared every Nth time in a list according to the Provider selected and the type of service and date range for that service. For example, if the Nth number is 8 then AIM will display every 8th client of the list.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

List of Clients Based on Every 2 Records

On Home Delivered Meals

For AIM Training

Name	Address			Phone
Hitchpost, Gallup	212 Stable	Addington	OK 79999	(918) 639-1212
Mills, Don	1 Single Lane	Adair	OK 74330	(580) -

OKC119 -- (C) Waiting Lists

PURPOSE

To view service activities that are waiting lists and the clients assigned to them.

USER INSTRUCTIONS

Select a provider name from the provider quick find list.

HOW DOES IT WORK

AIM searches for service activities that have clients identified as waiting.

REVIEWED BY

Caseworkers, Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Clients on Waiting Lists AIM Training

<u>Unique ID</u>	<u>Name</u>	<u>Home Phone</u>	<u>Gender</u>	<u>Age</u>	<u>Date Added</u>
hdm/55/ma and pas/home made bar 0000014682	Doe, Needsome	(405) 129-3954	Male	90	10/26/11
Total of 1 waiting for hdm/55/ma and pas/home made bananas					

OKC120 -- (C) Waiting Lists W/ADL Score

PURPOSE

To view service activities that are waiting lists and the clients assigned to them.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Use Score (Which nis ADL score) to help determine a client's waiting priority.

HOW DOES IT WORK

AIM searches for service activities that have clients identified as waiting.

REVIEWED BY

Caseworkers, Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Clients on Waiting Lists

Student 17

Unique ID	Name	Home Phone	Gender	Age	Date Added	Score
0000014682	Waiting For: cgr/13/watchful eye/ Doe, Needsome	(405) 129-3954	Male	90	11/05/13	21
Total of 1 wating for cgr/13/watchful eye/						

OKC121 -- (C) Multiple Owner Clients

PURPOSE

For a Provider to see what other Providers own their clients

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Run the OKE301 to get a list of Provider names to match the provider ID numbers on this report.

HOW DOES IT WORK

AIM finds the clients that belong to the provider selected and under each name lists the Provider ID numbers of each provider that own that client including the provider running the report.

REVIEWED BY

Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

[OKE301](#)

SAMPLE:

Clients with Multiple Owners

For: AIM Training
Run By: AIM Training

For a list of Providers
run the OKE301

Name	Address	City	County	Gender
Doe, Needsome	One Buck Ln	Shawnee	Pottawatomie	Male
Owners: 9999,99,2020,12				
Hitchpost, Gallup	212 Stable	Addington	Jefferson	Female
Owners: 9999,17,101,205				
Mills, Don	413 W. ALMOND	LEXINGTON	Cleveland	Male
Owners: 9999,14,48				
Mills, Don	1 Single Lane	Adair	xdf.kusdb	Male
Owners: 2020,106,157,9999				
Smith, Don	115 N. Pine St.	Longdale	Kay	Male
Owners: 180,104,9999				

OKC123 -- (C) All Clients Referred by a Provider

PURPOSE

For a Provider to see a list of referrals they made to other providers.

USER INSTRUCTIONS

Select a Provider from the list

HOW DOES IT WORK

AIM lists all referrals made by the provider selected regardless of referral status.

REVIEWED BY

Caseworkers, Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

All Clients Referred By: AIM Training

<u>Referred Client</u>	<u>Referred Service/Provider</u>	<u>Refer Date</u>
Hitchpost, Gallup Disposition: New Referral	Caregiver Counseling/Support Groups/Caregiver Training/Studer End Reason:	05/02/2014
Doe, Needsome Disposition: New Referral	Chili Con Artist/Pop's Chili Fixins (Not AIM user) End Reason:	05/02/2014
Doe, Needsome Disposition: New Referral	Chili Con Artist/Pop's Chili Fixins (Not AIM user) End Reason:	05/02/2014

OKC124 -- (C) All Clients Referred to a Provider

PURPOSE

For a Provider to see a list of referrals received from other providers.

USER INSTRUCTIONS

Select a Provider from the list.

HOW DOES IT WORK

AIM lists all the referrals made to the provider selected regardless of referral status.

REVIEWED BY

Caseworkers, Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

All Clients Referred To: AIM Training

<u>Referred Client</u>	<u>Referred by Service/Provider</u>	<u>Refer Date</u>
Doe, Needsome Disposition: Verified	Junk Food Referral/AIM Training End Reason:	05/01/2014
Doe, Needsome Disposition: Verified	Caregiver Counseling/Support Groups/Caregiver Training/AIM Train End Reason:	04/14/2014
, Disposition: New Referral	Caregiver Counseling/Support Groups/Caregiver Training/Student 1 End Reason:	04/14/2014
Smith, John	Caregiver Counseling/Support Groups/Caregiver Training/Student 4 End Reason:	04/14/2014

OKC125 -- (C) Unverified Clients Referred by a Provider

PURPOSE

For a Provider to see a list of referrals they made to other providers.

USER INSTRUCTIONS

Select a Provider from the list.

HOW DOES IT WORK

AIM lists only the unverified referrals made by the provider selected.

REVIEWED BY

Caseworkers, Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Unverified Clients Referred By: AIM Training

Referred Client	Referred Service/Provider	Refer Date
Hitchpost, Gallup Disposition: New Referral	Caregiver Counseling/Support Groups/Caregiver Training/Studer	05/02/2014 End Reason:
Doe, Needsome Disposition: New Referral	Chili Con Artist/Pop's Chili Fixins (Not AIM user)	05/02/2014 End Reason:
Doe, Needsome Disposition: New Referral	Chili Con Artist/Pop's Chili Fixins (Not AIM user)	05/02/2014 End Reason:
Hitchpost, Gallup Disposition: New Referral	Chili Con Artist/Pop's Chili Fixins (Not AIM user)	05/02/2014 End Reason:
Doe, Needsome	Home Delivered Meals/Student 2	05/02/2014

OKC126 -- (C) Unverified Clients Referred to a Provider

PURPOSE

For a Provider to see a list of referrals received from other providers.

USER INSTRUCTIONS

Select a Provider from the list

HOW DOES IT WORK

AIM lists only the unverified referrals made to the provider selected.

REVIEWED BY

Caseworkers, Project Directors, Planners, AAA Directors

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Unverified Clients Referred To: AIM Training

Referred Client	Birth Date	Address	Referred by Service/Provider	Refer Date
,	00/00/0000	,	Caregiver Counseling/Support Groups/Caregiver T	04/14/2014
Disposition: New Referral		End Reason:		
Smith, John	11/17/1938	9750 HWY 39 EAST, LEXINGTON	Caregiver Counseling/Support Groups/Caregiver T	04/14/2014
Disposition: New Referral		End Reason:		
Smith, John	06/09/1944	616 W Cherokee, Waukomis	Finger Printing/Student 2	04/14/2014
Disposition: New Referral		End Reason:		

OKC131 -- (C) Mailing Labels By Roster

PURPOSE

To make mailing labels for clients receiving a particular service.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Select an activity name from the activity quick find list.

HOW DOES IT WORK

Operates exactly like the [OKC100](#).

REVIEWED BY

Project Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

NEEDSOME DOE ONE BUCK LN SDFSDFASDFB SHAWNEE, OK 74804-	GALLUP HITCHPOST 212 STABLE ADDINGTON, OK 79999-	

OKC132 (C) Clients Without Caseworkers

PURPOSE

To view a list of clients who do not currently have a case worker entered

USER INSTRUCTIONS

Select a Provider name from the provider quick find list. Select an activity name selected from the activity quick find list.

HOW DOES IT WORK

AIM lists clients when one of two conditions exist: the Case Worker field is blank, or the information in the case worker field has no matching Employee record.

REVIEWED BY

Caseworkers, Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

List of Clients Who Have No Casewoker					
For: hdm/55/ma and pas/home made bananas					
AIM Training					
Name	Address	Phone	Age	Gender	
Doe, Needsome	One Buck Ln Shawnee 74804	(405) 129-3954	90	Male	
Hitchpost, Gallup	212 Stable Addington 79999	(918) 639-1212	110	Female	
Mills, Don	1 Single Lane Adair 74330	(580) -	268	Male	

OKC133(C) Clients By City and Activity

PURPOSE

To list clients with service by their city of residence.

USER INSTRUCTIONS

Select a Provider name from the provider quick find list. Select one or more activity names from the activity quick find list. Enter dates for a period of service.

HOW DOES IT WORK

AIM searches for clients that belong to the Provider selected that received service from the activities selected during the dates entered..

REVIEWED BY

Caseworkers, Project Directors, Planners

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

List of Clients By City						
AIM Training						
	Name	Address	Zip	Phone	Gender	Age
Adair	Mills, Don	1 Single Lane	74330	(580) -	Male	268
Addington	Hitchpost, Gallup	212 Stable	79999	(918) 639-1212	Female	110
Shawnee	Doe, Needsome	One Buck Ln	74804	(405) 129-3954	Male	90

OKC`134(C) Clients by Provider and Taxonomy

PURPOSE

To list clients that received a particular service.

INFORMATION THE USER MUST ENTER

Select a Provider name from the provider quick find list. Select a NAPIS group from the NAPIS group quick find list. Enter dates for the period of service.

HOW DOES IT WORK

AIM searches for clients that belong to the selected provider and received the service selected during the dates entered.

REVIEWED BY

Caseworkers, Project Directors, Planners
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

**List of Clients Belonging to: AIM Training
Receiving Home Delivered Meals Services**

ID	Name	DOB	Gender	Status
0000014682	Doe, Needsome	2/28/1923	Male	Active
HIT012203A	Hitchpost, Gallup	1/22/1903	Female	Active
T000067945	Mills, Don	1/1/1745	Male	Active
T000020139	Smith, Joe	6/30/1955	Male	Active

OKC135(C) ADvantage Clients by Date and Activity

PURPOSE

To see a list of ADvantage clients that received service from a particular activity.

USER INSTRUCTIONS

Select a Provider name from the provider quick find list. Select an advantage activity name from the activity quick find list. Enter dates for a period of service.

HOW DOES IT WORK

AIM looks only at the activity name, not the Advantage check box. The user must select an activity that begins with adv to get the correct information.

REVIEWED BY

Caseworkers, Project Directors, Planners

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

ADvantage Clients by Date and Activity
 AIM Training
 adv/77/alpha site/

Name	Address	Phone
Doe, Needsome	One Buck Ln Shawnee, OK 74804	(405) 129-3954
Hitchpost, Gallup	212 Stable Addington, OK 79999	(918) 639-1212

OKC138(C) Caregivers With Care Receiver's Diagnosis

PURPOSE

To view the primary diagnosis of a caregiver's care receiver.

USER INSTRUCTIONS

Select a Provider name from the provider quick find list.

HOW DOES IT WORK

AIM displays a list of clients for a provider. Although anyone can run this report, if a non-caregiver provider is selected the correct information will not be displayed.

REVIEWED BY

Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Alphabetic List of CareGivers with CR Diagnosis

AIM Training

Name	Address	Phone	Status	CG	Diagnosis
Doe, Needsome	One Buck Ln Shawnee, OK 74804	(405) 129-3954	Active	<input checked="" type="checkbox"/>	Memory Loss
Phipps, Loren	4001 Corn Drive Bartlesville, OK 74006	() -	Active	<input checked="" type="checkbox"/>	Paralyzed
Mills, Don	1 Single Lane Adair, OK 74330	(918) 433-8205	Active	<input checked="" type="checkbox"/>	Hands Glued Together

OKC139(C) Clients with Latest Service Date

PURPOSE

USER INSTRUCTIONS

Enter dates for a period of service. Select a Provider name from the provider quick find list.

Use this report to help analyze incorrect information in the OKS738 or OKN509.

HOW DOES IT WORK

AIM displays all the types of services a provider recorded and selects clients that received those services during the entered date range. The same clients may appear under more than one type of service.

REVIEWED BY

Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Clients Listed by Service Type with Latest Date of Service

AIM Training

Service	Name	Last Service
ADvantage/Medicaid Waiver	Doe, Needsome	07/01/2013
	Hitchpost, Gallup	08/01/2013
Chore	Phipps, Loren	09/26/2013
Home Delivered Meals	Doe, Needsome	03/05/2013
	Hitchpost, Gallup	08/01/2013
	Mills, Don	08/01/2013

OKC140 -- (C) Clients with Emergency Contact Info

PURPOSE

To access the emergency contacts for a list of clients.

USER INSTRUCTIONS

Four arguments

Three argument windows

Select a Provider name from the provider quick find list. Enter dates for a period of service. Select an activity name from the activity quick find list.

HOW DOES IT WORK

AIM searches for clients that belong to the selected provider who received the selected service during the date range entered. Each record has two rows. The second row in bold is the emergency contact.

REVIEWED BY

Case workers, Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Alphabetic Client List with Emergency Contacts					
AIM Training					
Site/Type of Service: hdm/55/ma and pas/home made bananas/ Home Delivered Meals					
Total Clients this Provider: 3					
Name	Address		Home Phone	DOB	
<i>E Contact and Relationship</i>	<i>E Phone and Cell Phone</i>				
Doe, Needsome	One Buck Ln	Shawnee, OK 74804	(405) 129-3954	2/28/1923	
Jed Ned, Son	(555) 555-5555	(333) 333-3333			
Hitchpost, Gallup	212 Stable	Addington, OK 79999	(918) 639-1212	1/22/1903	
Horacio Jones, X-Friend	(580) 112-2345	(580) 639-4545			
Mills, Don	1 Single Lane	Adair, OK 74330	(918) 433-8205	1/1/1745	
Honey Do, Wife	(405) 721-9236	(405) 830-5355			

OKC141 -- (C) New Clients for a Provider

PURPOSE

To view a list of clients served for the first time during a particular period.

USER INSTRUCTIONS

Enter dates for the period of service for which you want to check for new clients. Select a Provider name from the provider quick find list

HOW DOES IT WORK

AIM searches for clients that belong to the selected provider and have received service within the entered date range. AIM then looks for the same clients prior to that date range and lists everyone that it does not find.

REVIEWED BY

Case workers, Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

List of New Clients Served

3 New Clients Served by AIM Training

From: July 2013 Thru: October 2013

Today's Date: 10/31/2013

Name	Address	Phone
1 New Clients For adv/77/alpha site/		
Hitchpost, Gallup	212 Stable, Addington 79999	(918) 639-1212
1 New Clients For cho/17/Stoop Repair and More/		
Phipps, Loren	4001 Corn Drive, Bartlesville 74006	() -
2 New Clients For hdm/55/ma and pas/home made bananas		
Hitchpost, Gallup	212 Stable, Addington 79999	(918) 639-1212
Mills, Don	1 Single Lane, Adair 74330	(918) 433-8205

OKC143 (C) Clients: their Age and Caseworker

PURPOSE

To view clients and their case workers.

USER INSTRUCTIONS

Enter dates for the period of service.

HOW DOES IT WORK

AIM searches for clients that belong to the current provider who have case workers assigned.

REVIEWED BY

Project Directors, Planners, AAA Directors
 Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

List of Active Clients Their Ages and Caseworkers

AIM Training

From 1/1/2013 To 10/31/2013

Client	Birth Date	Age	Caseworker
Mills, Don	01/01/1745	268	Student 6,
Smith, Joe	06/30/1955	58	Student 6,
Doe, Needsome	02/28/1923	90	Student12,
Hitchpost, Gallup	01/22/1903	110	Student12,

OKC144(C) Caregivers/Care Receivers: Address/Diagnosis

PURPOSE

To view care givers who have a care receiver relationship in AIM, their addresses and the care receiver's primary diagnosis.

USER INSTRUCTIONS

Select a Provider name from the provider quick find list.

HOW DOES IT WORK

AIM searches for care givers that have a care receiver relations entered to the database by the selected provider.

REVIEWED BY

Project Directors, Planners, AAA Directors
 Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Caregivers and their Care Receivers

AIM Training

Name	Address	Birth Date	Phone	Gender
CareGiver: Doe, Needsome	One Buck Ln, Shawnee, OK 74804	2/28/1923	(405) 129-3954	Male
Care Receiver: Hitchpost, Gallup	212 Stable, Addington, OK 79999	1/22/1903	(918) 639-1212	Female
Relationship: Son/Son-in-Law		Diagnosis: Memory Loss		

OKD200 (D) Erroneous Birth Dates on Clients

PURPOSE

To find birth dates that need to be corrected.

USER INSTRUCTIONS

Select a Provider name from the provider quick find list.
 Open the record of a client on the list, find the person's correct birth date and enter it into AIM.

HOW DOES IT WORK

AIM compares birth dates two ways. It determines if the birth date is future of the current date or if it is older than the year 1850.

REVIEWED BY

Project Directors, Planners, AAA Directors
 Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Clients' Birth Dates that are Probably Incorrect

AIM Training

Name	Address	Phone	Birth Date
mills, joe	Oklahoma City 73107	(580) -	01/01/2930
Mills, Don	1 Single Lane Adair 74330	(918) 433-8205	01/01/1745

OKD202 (D) Counties Entered Wrong in Client Records

PURPOSE

To find client records where the county of residence is not an Oklahoma county.

USER INSTRUCTIONS

Select a Provider name from the provider quick find list. Find the record of a client on the list and use the automated tool to correct the county. Access the tool by clicking the zip code field.

HOW DOES IT WORK

AIM compares the information in each client's county field to a list of counties stored in AIM. Any one that does not match exactly is added to the report.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

**List of Clients with Misspelled or Erroneous Counties
Does not Include Non Oklahoma Clients**

AIM Training

Last Name	First Name	Address	City	County	Zip Code
Mills	Don	1 Single Lane	Adair	xd.f.kusdb	74330

OKD203(D) NAPIS Groups and Associated Activities

PURPOSE

To ensure that your service activities are assigned to the proper NAPIS Group.

USER INSTRUCTIONS

Check the each activity under each NAPIS Group by comparing the NAPIS group to the first three letters of the activity name. If you are not sure whether they match check the memo on Activity Naming, [Activity Naming Standard](#). NSIP should only be for activities

under home delivered meals with the first three letters either hdm, hu6 or cgm and for congregate meals with the first three letters either con, cu6 or vu6.

HOW DOES IT WORK

AIM lists all NAPIS Groups and activities for the provider and does not perform an auto-check for errors. Archived activities are not included.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Ensure Activities have the Correct NAPIS Group Assigned		
AIM Training		
Provider: AIM Training		
NAPIS Group: ADvantage/Medicaid Waiver		<u>Activity Name</u>
	NON NSIP	adv/79/alpha site/
NAPIS Group: Chore		<u>Activity Name</u>
	NON NSIP	cho/17/Stoop Repair and More/
NAPIS Group: Congregate Meals		<u>Activity Name</u>
	NON NSIP	con/22/Deep Kettle/
	NON NSIP	vol/55/pepole
NAPIS Group: Health Promotion		<u>Activity Name</u>
	NON NSIP	i&a/01/food/jhours
NAPIS Group: Home Delivered Meals		<u>Activity Name</u>
	NON NSIP	hdm/55/ma and pas/home made bananas
	NSIP	hdm/55/My Site/
	NON NSIP	hdm/74/dewey/
	NSIP	hdm/74/whashington/
NAPIS Group: Nutrition Education		<u>Activity Name</u>

OKD204 (D) Incorrectly Formatted Activity Names for a Provider

PURPOSE

To find activity names that need to be corrected.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Examine each activity on the list to determine the error or errors and annotate the correction next to each activity.

Open the Activity Setup in AIM and correct the appropriate activity names. Filke the report with the corrections in case there is a problem in the futrue with the correct you made in AIM. If you are unclear about what the error is review the memo on Activity Naming Standard. [Activity Naming Standard](#)

HOW DOES IT WORK

AIM looks at the positions of slashes, checks the three-letter service code prefix, checks the county number. If AIM finds just one of those things wrong the activity is added to the report. Note: AIM does not tell you what the specific error is.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

**List of Activity Names for AIM Training
That Are Formatted Incorrectly**

See INFORMATION MEMO 2007-AIM01C in the AIM User Reference
Activity Naming Standard for the Oklahoma AIM Database

NAPIS Group	Activity Name
ADvantage/Medicaid Waiver	adv/79/alpha site/
Caregiver Counseling/Support Groups/Car	cgt/12/duncin
Congregate Meals	vol/55/pepole
Health Promotion	hea/74/eastside
Transportation	tra/55/Metro Get-a-ride

OKD205 (D) Zip Codes in Routes

PURPOSE

To see the group of residential zip codes that are in meal or transportation routes.

USER INSTRUCTIONS

Select a provider name from a list. Enter a set of dates for the service date range.

HOW DOES IT WORK

AIM searches for client records with route information for the current provider, then lists the routes and groups associated residential zip codes under each.

REVIEWED BY

Project Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Zip Codes in a Route

Tulsa County Senior Nutrition

Route	Zip Code
Advantage C.Heights	74021
Advantage Cardinal Height	74021
Advantage Cornerstone	74115
Advantage Country Oaks	74066
	74107
	74132
Advantage Crk Frozen #1	74131
Advantage Crk Frozen #2	74047
Advantage Crk Frozen #3	74028
	74044

OKD206 (D) Reports in AIM

PURPOSE

To see a list of custom reports stored in AIM

USER INSTRUCTIONS

None

HOW DOES IT WORK

AIM stores a manually updated list of reports and displays them sorted by report name. Since the list is updated manually, it does not always contain all of those listed in the report quick find.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Alphabetical List of Reports in AIM

Report Id	Report Name	Client Status Consideration
Designed by Oklahoma DHS		
OKA017	(A) Assessment Data for a Single Client	Any Status
OKA016	(A) Assessment Dates for Clients not Served	Active Only
OKA003	(A) Assessment Dates for Recently Served Clients	Active Only
OKA014	(A) Assessment Dates/Client Names Multi Providers	Active Only
OKA007	(A) Assessment Details and Client Info	Any Status
OKA012	(A) Clients Grouped by Assessment Date/Provider	Any Status
OKA013	(A) Clients with Assessment Date/Provider Listed	Any Status
OKA010	(A) Individual Assessment Details for a Particular Provider	Any Status
OKA011	(A) Individual Assessment Details for a Particular Provider and Date	Any Status
OKA009	(A) Individual Assessment Details for any Provider	Any Status
OKA008	(A) Individual Assessment Details for Current Provider	Any Status
OKA001	(A) Next Assess Date For Clients/Caseworkers	Active Only
OKA002	(A) Next Assess Date for Clients/Operators	Active Only
OKA005	(A) Nutrition Questions (per client) by Meal Type	Any Status
OKA004	(A) Nutrition Questions Summary by Meal Type	Any Status
OKA006	(A) Unanswered Assessment Questions for a Client	Any Status

OKD208(D) Service Activities with Service dates 2 Years or Older

PURPOSE

To identify discontinued activities that need to be archived

USER INSTRUCTIONS

After running the report, use the check boxes next to the activity names to annotate the option for archiving then FAX the marked sheets to the Oklahoma State Office.

HOW DOES IT WORK

AIM looks at the most recent service for each activity in your database. If the service is more than two years old the activity will be added to the report. Activities that have never had a service will not be on the list.

REVIEWED BY

Project Directors, Planners

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Activities Where the Last Service is More than Two Years Old

AIM Training

This is a list of activities that should be archived. Archived activities can be restored with 24 hours notice. Place a check in the box next to Archive for activities you want archived or Place a check in the box next to Do Not Archive for activities you want to remain on your activity quick find list. FAX the completed report to Aging Service 405-521-2086.

	NAPIS Group	Activity Name
AIM Training		
	Congregate Meals	
994965	<input type="checkbox"/> Archive <input type="checkbox"/> Do Not Archive	con/22/Deep Kettle/

OKD209(D) Service Dates Prior to Dates Entered

PURPOSE

To see if services are being entered within the required time limit.

USER INSTRUCTIONS

Select a Provider Name from the provider quick find list. Then select a type of service from a NAPIS Group list. Then enter a date range which is the presumed period of service being reported on. Find the service in AIM and either correct the date or be prepared to explain why someone waited so long to enter the service into the database.

HOW DOES IT WORK

AIM finds services where the date range correlates to the dates that services were entered into the database. Then it finds service dates that are a month or more older than the from date.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

List of Clients and Services with Prior Service Dates

Student 12

Total Number Of Units: 2.00

Name	Date of Service	Date Entered	Units	Activity Name
		<i>Congregate Meals</i>		
Doe, Needsome	3/1/2013	11/05/2013	1.00	con/62/Deepkettle/
Doe, Needsome	4/1/2013	11/05/2013	1.00	con/62/Deepkettle/

List of Clients and Services with Prior Service Dates

Nothing to Report

Name	Date of Service	Date Entered	Units	Activity Name
------	-----------------	--------------	-------	---------------

OKD210 (D) Service Dates Future to Date Entered

PURPOSE

To find services where the service date had not yet occurred

USER INSTRUCTIONS

Select a Provider Name from the provider quick find list. Then select a type of service from a NAPIS Group list. Then enter a date range which is the presumed period of service being reported on. Find the service in AIM and either correct the date or delete the service from the database

HOW DOES IT WORK

AIM compares the service date to the date of entry and lists services for dates that had not yet occurred at the time the service was entered into AIM. Note: Don't be confused if you see a service on the report where the service date has already passed. AIM does not compare the service date to the current date, only to the Entered date.

REVIEWED BY

Project Directors, Planners, AAA Directors
 Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

List of Clients and Services with Future Service Dates

AIM Training

Total Number Of Units: 1.00

Name	Date of Service	Date Entered	Units	Activity Name
				<i>Congregate Meals</i>
Doe, Needsome	4/1/2015	11/05/2013	1.00	con/22/Deep Kettle/

OKD211 -- (D) New Client Entries that are Duplicates

PURPOSE

To see newly inserted client records that may be duplicates

USER INSTRUCTIONS

Enter dates for the period of new client inserts

HOW DOES IT WORK

AIM uses the dates entered to find new clients inserted during that time then compares them to the current list of known duplicates.

REVIEWED BY

Project Directors, Merge Administrators, Planners, AAA Directors
 Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

[OKD212](#)

SAMPLE

New Clients Inserted Resulting in Duplicated Client Records

AIM Training

Between: 6/1/2014 and 6/5/2014

	Client Name/DOB/City	AIM User Name
T000109389	DOE, NEEDSOME 2/28/1923 HOWE	Instructor, AIMINST1

OKD212 -- (D) Duplicate Clients

PURPOSE

To get a list of clients that may be duplicates

USER INSTRUCTIONS

See [Resolving Duplicate Records](#)

HOW DOES IT WORK

AIM assembles a list of potential duplicate clients by comparing name, birth date, race, gender and city. Then each client record is compared to the owners list.

REVIEWED BY

Merge Administrators, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

[OKD211](#), [OKE301](#)

SAMPLE

AAA Duplicates							
Unique Id	Last Name	First Name	Birth Date	Race Code	Gender	City	Provider List
T00009849:	DOE	NEEDSOME	2/28/1923	Other	Male	HOWE	9902,991:
T00010993:	DOE	NEEDSOME	2/28/1923	Other	Male	HOWE	9999

OKE300(E) Employees and Titles

PURPOSE

To ensure a provider's list of employees in AIM are current and correct.

USER INSTRUCTIONS

Select a Provider name from the provider quick find list.

HOW DOES IT WORK

The employee name displayed will be only for the Provider selected.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Employee List with Job Ttitle

AIM Training

Name	Job Title
Instructor,	AIM Training

OKE301(E) Provider's Names and ID Numbers

PURPOSE

To find a provider name when only the provider ID number is available.
AIM has certain reports the include a provider ID number without the provider name.

USER INSTRUCTIONS

Nothing to enter.

HOW DOES IT WORK

AIM lists all current Providers and sort them alphabetically by AAA and then by provider name.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Title III Providers for Oklahoma

ID#	Name	AAA	Agency Exec
14	Aging Service, Inc., Cleveland	Areawide	Kathleen Wilson
17	Aging Services, Canadian	Areawide	Missy King
85	Areawide Health Promotions	Areawide	Don Hudman
11	AreaWide I&A/CM	Areawide	Don Hudman
1018	Areawide S56A	Areawide	Don Hudman
13	Logan County Aging Services	Areawide	Barbara Sparkm.
18	Metro Transit	Areawide	Mary Kay Fox
12	Mobile Meals of OKC	Areawide	Carolyn Roslik
36	OHAI	Areawide	Claire Dowers-N
15	Oklahoma County Nutrition	Areawide	Barbara Sparkm.
205	SunBeam	Areawide	Traci Bartley-Yot
101	AreaWide AAA	AreaWide	Don Hudman
1011	AW Respite Aging Service, Inc	AREAWIDE	Kathleen Wilson
103	ASCOG AAA	ASCOG	Ken Jones
1032	ASCOG Caring for SRS	ASCOG	Ken Jones
24	ASCOG I&A	ASCOG	Ken Jones
1038	ASCOG S56A	ASCOG	Ken Jones
1031	ASCOG SRS w minors	ASCOG	Ken Jones
25	Delta Nutrition	ASCOG	Dan Lowrance
81	Great Plains Caregiver	ASCOG	Oleta Butler
87	Maddieluke	ASCOG	Laura Goldring
110	COEDD AAA	COEDD	John Shae

OKG401(G) Key Indicators (STO Only)

PURPOSE

To see service numbers for a certain period of time.

USER INSTRUCTIONS

Enter dates for the period of .

HOW DOES IT WORK

AIM adds the units of service in each category for the date range entered.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

ASD All State Quarterly Report

State of Oklahoma

From: 1/1/2014 To: 3/31/2014

Transportation UoS	HDM UoS	Congregate UoS	Volunteer Hours	All Services Minus HDM_& Congregate
466,613.00	317,237	349,499	139,515.50	606,180.42
Transportation Undup Count	HDM Undup Count	Congregate Undup Count	Volunteer Undup Count	
2,244	6,425	12,081	4,245	

OKG403(G) Number of Clients by Age/Demographic (STO Only)

PURPOSE

USER INSTRUCTIONS

Enter dates for a period of service.

HOW DOES IT WORK

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE [OKN500](#)

OKG404(G) Expenditures by AAA, Annual (STO Only)

PURPOSE

To view each AAA's annual expenditures for a certain federal fiscal year.

USER INSTRUCTIONS

Enter the first date of a federal fiscal year, i.e. 10/1/2013 or 10/1/2014.

HOW DOES IT WORK

AIM lists the expenditures reported by each AAA for the fiscal year entered.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

AAA Expenditure Reports Areawide For Federal Fiscal Year: 2013							
Service Type	All Funds	B	C1	C2	D	E	Program Income
1. Personal Care	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00
2. Homemaker	\$237,553.00	\$164,825.00	\$.00	\$.00	\$.00	\$.00	\$23,464.00
3. Chore	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00
4. Home Delivered Meals	\$1,037,063.00	\$.00	\$.00	\$641,367.00	\$.00	\$.00	\$119,644.00
5. Adult Daycare	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00
6. Case Management	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00
7. Congregate Meals	\$1,947,985.00	\$.00	1,182,480.00	\$.00	\$.00	\$.00	\$182,735.00
8. Nutrition Counseling	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00
9. Assisted Transportation	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00
10. Transportation	\$442,584.00	\$350,750.00	\$.00	\$.00	\$.00	\$.00	\$29,919.00
11. Legal Assistance	\$18,353.00	\$16,501.00	\$.00	\$.00	\$.00	\$.00	\$115.00
12. Nutrition Education	\$28,704.00	\$.00	\$12,565.00	\$11,663.00	\$.00	\$.00	\$690.00
13. Information and Assistance	\$145,359.00	\$108,651.00	\$.00	\$.00	\$.00	\$.00	\$6,768.00
14. Outreach	\$241,134.00	\$136,614.00	\$3,894.00	\$11,529.00	\$.00	\$.00	\$5,698.00
17. Health Promotion	\$45,986.00	\$.00	\$.00	\$.00	\$39,089.00	\$.00	\$.00
15. Advocacy Representation	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00

OKG405 (G) Legal Stats of Closed Cases

PURPOSE

To view the types of legal cases for each AAA

USER INSTRUCTIONS

None

HOW DOES IT WORK

AIM looks at the case information stored on each client and displays all that is available.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Number and Types of Legal Cases by AAA

Areawide AAA

	A	B	F	G	H	Ia	Ib	Ic	K	L
Consumer										
Bankruptcy / Debtor Relief	31	9	0	0	0	2	0	0	0	0
Collection (Including /Repossession / Deficiency /	95	21	2	12	0	3	1	0	1	0
Collection Practices / Creditor Harrassment	1	1	1	0	0	0	0	0	0	0
Contracts / Warranties	55	4	0	0	0	0	0	0	0	0
Loans/Installment Purch. (Not Collections)	2	1	0	0	0	0	0	0	0	0
Other Consumer / Finance.	33	1	1	0	0	0	0	0	0	0
Predatory Lending Practices (Not Mortgages)	0	0	0	0	0	0	0	0	0	0
Public Utilities	1	1	1	0	0	0	0	0	0	0
Unfair and Deceptive Sales Practices (Not Real Pro	3	0	0	0	0	0	0	0	0	0
Education										
Access (Including Bilingual, Residency, Testing)	0	0	0	0	0	0	0	0	0	0
Discipline (Including Expulsion and Suspension)	0	0	0	0	0	0	0	0	0	0
Other Education	0	0	0	0	0	0	0	0	0	0
Special Education / Learning Disabilities	0	0	0	0	0	0	0	0	0	0
Student Financial Aid	1	1	0	0	0	0	0	0	0	0
Vocational Education	0	0	0	0	0	0	0	0	0	0
Family										
Adoption	2	0	0	0	0	0	0	0	0	0
Adult Guardianship / Conservatorship	20	5	0	1	0	6	0	0	0	1
Custody / Visitation	7	1	0	0	0	1	1	0	0	0
Divorce / Seperation / Annulment	25	1	0	0	0	5	1	0	1	0
Domestic Abuse	3	0	0	1	0	2	2	0	0	0
Name Change	5	1	0	1	0	1	0	0	0	0
Other Family	13	0	0	0	0	0	0	0	0	0

A: Counsel and Advice	H: Administrave Agency Decision	K: Other
B: Brief Services (other than Counsel and Advice)	Ia: Uncontested Court Decision	L: Extensive Services
F: Negotiated Settlement (without Litigation)	Ib: Contested Court Decision	
G: Negotiated Settlement (with Litigation)	Ic: Appeals	

Oklahoma ASD Report ID: OKG405 Printed: 06/05/2014 Page 1 of 33

OKG406(G) Legal Stats of Closed Cases All State

PURPOSE

To view the types of legal cases for the entire state at once

USER INSTRUCTIONS

None

HOW DOES IT WORK

AIM looks at the case information stored on each client and displays all that is available.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE [OKG405](#)

OKN500(N) Numbers of Clients by Age/Demographics

PURPOSE

To see the numbers of clients in certain categories.

USER INSTRUCTIONS

Select a provider name selected from the provider quick find list. Enter dates for a period of service.

HOW DOES IT WORK

AIM counts the number of individual clients (unduplicated count) for the selected provider and date range entered on each category in the report.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

[OKN501](#), [OKN506](#), [OKP600](#), [OKP610](#)

SAMPLE

Projected Aging Program Output Targeting Goals

AIM Training

1. Unduplicated Client Count by Type of OAA Title III Services

- A. Unduplicated Count of Persons Served in REGISTERED Services
- B. Unduplicated Count of Persons Served in NON-REGISTERED Services
- C. TOTAL Unduplicated Count of Persons Served in All Services

TOTALS

	2
	0
	2

(Note: This is not necessarily the SUM of lines A and B, as the same individuals could be served in both groups of services.)

2. Unduplicated Client Count by Characteristic

A. Clients by Minority Status

- 1. American Indian/Native Alaskan
- 2. African American
- 3. Asian
- 4. Hispanic
- 5. Hawaiian/Pacific Islander
- 6. Non-Minority

Clients for Registered Services

Clients for Other Services

Clients for All Services

0	0	0
0	0	0
1	0	1
2	0	2
0	0	0
0	0	0

TOTALS

3	0	3
---	---	---

- B. Clients Residing in Rural Areas
- C. Clients in Poverty
- D. Clients in Poverty?Minority
- E. Clients Who Are Female
- F. Clients Who Are Male

0	0	0
2	2	2
1	1	1
1	0	1
1	0	1

3. Client Profile Count

	Age 60 - 64	Age 65 - 74	Age 75 - 84	Age 85+
Total Clients	0	0	0	2
Total Clients Residing in Rural Areas	0	0	0	0
Total Clients in Poverty	0	0	0	2
Total Clients in Poverty/Minority	0	0	0	1
Total Clients Living Alone	0	0	0	1
Total Female Clients	0	0	0	1
Total Male Clients	0	0	0	1

4. Client Impairment Count

0-2 ADL Impairments	0	0	0	1
3+ ADL Impairments	0	0	0	2
0-2 IADL Impairments	0	0	0	2
3+ IADL Impairments	0	0	0	1

(Note: Services with ADL/IADL evaluations are Homemaker, Chore, Home Delivered Meals and Case Management)

OKN501(N) Estimated Clients and Units Breakdown/ RFP

PURPOSE

USER INSTRUCTIONS

Enter dates for a period of service. Select a provider name from the provider quick find list.

HOW DOES IT WORK

Aim counts the number of individual clients and sums the services in each category for the date range entered and the provider selected.

RELATED REPORTS AND TYPES OF REPORTS

[OKN500](#), [OKN506](#), [OKP600](#), [OKP610](#)

SAMPLE

Estimate Persons Served and Service Units
In Support of the RFP Process

AIM Training

From: 1/1/2014 To: 6/12/2014

Service Categories	Unduplicated Persons		Service Units	Clients in Poverty	Clients in Poverty/ Minority	Minority Status					Live Alone	0-2 ADL	3+ ADL	0-2 IADL	3+ IADL	High Nutrition Risk 6+	
	Urban	Rural				AI	AF	AS	HS	NM							
	(1)	(2)	(3)	(4)	(5)					(6)	(7)	(8)	(9)	(10)	(11)		
ADvantage/Medicaid Waive	0	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0
Chore	0	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0
Congregate Meals	0	1	1	0	0	0	0	1	1	0	0	1	0	1	0	0	0
Health Promotion	0	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0
Home Delivered Meals	0	1	1	0	0	0	0	1	1	0	0	1	0	1	0	0	0
Nutrition Education	0	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0

OKN502(N) Number of Clients By City for a Provider

PURPOSE

To see the number of clients and services for cities within a provider's area of service.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Enter dates for a period of service.

HOW DOES IT WORK

Aim counts individual clients and sums services on each city listed for the selected provider and date range entered. The report was originally designed for a caregiver coordinator.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Number Of Clients and Services By City

AIM Training

From: 6/1/2013 To: 11/7/2013

City	Clients	Services
Adair	1	1.00
Addington	1	2.00
Bartlesville	1	1.00
Shawnee	1	1.00

OKN505 (N) Number of Clients By County

PURPOSE

USER INSTRUCTIONS

Select an activity name from the activity quick find list. Select a provider from the provider quick find list. Enter dates for a period of service.

HOW DOES IT WORK

AIM counts individual clients for the selected provider, selected activity and date range entered and groups the results by zip code.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

**Number Of Clients
By Activity and Zip Code**

hdm/55/ma and pas/home made bananas

AIM Training

From: 6/1/2013 To: 11/7/2013

<u>Name</u>	<u>Address</u>	<u>DOB</u>	<u>Age</u>	<u>Gender</u>
74330				
Mills, Mills	1 Single Lane, Adair	1/1/1745	268	M
Total Clients Per 74330 Zip Code:		1		
79999				
Hitchpost, Hitchpost	212 Stable, Addington	1/22/1903	110	F
Total Clients Per 79999 Zip Code:		1		
<hr/>				
Total Unduplicated Count: 2				

OKN506 (N) Population Demographics (Area Plan)

PURPOSE

To see the number of clients in demographic categories.

USER INSTRUCTIONS

Select a AAA name selected from a list. Enter dates for a period of service.

HOW DOES IT WORK

AIM counts the individual clients in each category for the AAA selected and date range entered.

RELATED REPORTS AND TYPES OF REPORTS

[OKN500](#), [OKN501](#), [OKP600](#), [OKP610](#)

SAMPLE

Population Demographics of Persons Served Age 60 and Over

State of Oklahoma

County	Total	Female	Male	African American	American Indian	Asian	Hispanic	Poverty	Poverty Minority	Limited English	Rural	Living Alone
Beaver	52	29	23	0	0	0	1	16	0	0	50	17
Cimarron	54	32	22	0	0	0	6	16	5	0	50	27
Dewey	75	44	31	0	0	0	0	19	0	0	70	35
Ellis	57	38	19	0	1	0	0	4	0	0	55	13
Harper	55	34	21	0	0	0	0	10	0	0	53	21
Texas	98	68	30	0	2	0	4	37	4	1	94	48
Woods	152	87	65	0	0	0	0	36	0	0	146	64
Woodward	126	88	38	0	2	0	0	29	0	0	113	61

OKN507 (N) Volunteers and Volunteer Hours

PURPOSE

USER INSTRUCTIONS

Enter a 4-digit state fiscal year. Select a provider name from the provider quick find list.

HOW DOES IT WORK

AIM counts volunteers and volunteer hours by quarter of a given state fiscal year. All counts are taken directly from the activities that begin with vol and are associated with the Volunteers and volunteer hours NAPIS groups.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE:

Quarterly Volunteers and Volunteer Hours for SFY 2014

AIM Training

AIM Training

	Volunteers With Client Records				
	Unduplicated First Time Volunteers	All Unduplicated Volunteers	Cumulative Unduplicated Volunteers	Number of Aggregate Volunteers	Number of Volunteer Hours
First Quarter	0	0	0	0	.00
Second Quarter	0	0	0	0	.00
Third Quarter	0	0	0	0	.00
Fourth Quarter	0	0	0	0	.00

OKN508(N) Client/Service Numbers by Taxonomy and Month

PURPOSE

To see the number of clients and services by OAA Title III taxonomy and service date.

USER INSTRUCTIONS

Three arguments

Two argument windows

Enter dates for a period of service. Select a provider name from the provider quick find list.

HOW DOES IT WORK

AIM counts individual clients and services for the selected provider and date range entered and groups the numbers by taxonomy and service date.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Number of Clients and Units by Taxonomy

AIM Training

Taxonomy	Service Date	Client Count	Units of Service
AIM Training			
ADvantage/Medicaid Waiver	7/2013	1	1.00
	8/2013	1	1.00
	Total for ADvantage/Medicaid Waiver:	2	2.00
Chore			
	9/2013	1	1.00
	Total for Chore:	1	1.00
Home Delivered Meals			
	8/2013	2	2.00
	Total for Home Delivered Meals:	2	2.00

OKN509 (N) Client/Service Numbers (Owned Clients Only)

PURPOSE

USER INSTRUCTIONS

Enter dates for a period of service. Select a provider name from the provider quick find list.

HOW DOES IT WORK

AIM counts individual clients and services for each activity of a selected provider and date range entered and groups and subtotals them by the first three letters of the activity name.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Activity - All Undup		
AIM Training		
<i>Unduplicated Count - Total Units</i>		
Activity	Clients	Units
Student 3		
cgs/55/sunbeam/	1	1.00
Duplicated Sub Total For cgs: 1 clients, 1.00 units		
Duplicated Count, Sum of Units for Student 3	1	1.00
AIM Training		
con/22/Deep Kettle/	1	1.00
Duplicated Sub Total For con: 1 clients, 1.00 units		
hdm/55/ma and pas/home made bananas	1	1.00
Duplicated Sub Total For hdm: 1 clients, 1.00 units		
Duplicated Count, Sum of Units for AIM Training	2	2.00
Unduplicated Count, Sum of Units for All:		
	2	3.00

OKN510(N) Client/Service Numbers (Archived Only)

PURPOSE

To see numbers of clients and units for service activities that are no longer in use.
(Historical)

USER INSTRUCTIONS

Enter dates for a period of service. Select a provider name from the provider quick find list.

HOW DOES IT WORK

AIM counts individual clients and services for each archived activity of a selected provider and date range entered and groups and subtotals them by the first three letters of the activity name.

REVIEWED BY

Project Directors, Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE [OKN509](#)

OKN511(N) Client/Service Numbers (Metro Trans)

PURPOSE

USER INSTRUCTIONS

Enter dates for a period of service. Select a provider name from the provider quick find list.

HOW DOES IT WORK

AIM counts individual clients and services for each activity of a selected provider and date range entered and groups and subtotals them by the first three letters of the activity name.

REVIEWED BY

Project Directors, Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Activity - All Undup (Metro Trans)		
AIM Training		
<i>Unduplicated Count - Total Units</i>		
Activity	Clients	Units
Student 3		
cgs/55/sunbeam/	1	1.00
Duplicated Sub Total For sun: 1 clients, 1.00 units		
Duplicated Count, Sum of Units for Student 3	1	1.00
AIM Training		
con/22/Deep Kettle/	1	1.00
Duplicated Sub Total For Dee: 1 clients, 1.00 units		
hdm/55/ma and pas/home made bananas	1	1.00
Duplicated Sub Total For ma : 1 clients, 1.00 units		
Duplicated Count, Sum of Units for AIM Training	2	2.00
Unduplicated Count, Sum of Units for All:		
	2	3.00

OKN513(N) Client/Service Numbers (Includes Deleted Clients)

PURPOSE

USER INSTRUCTIONS

Enter dates for a period of service. Select a provider name from the provider quick find list.

HOW DOES IT WORK

AIM counts individual clients and services for each activity of a selected provider and date range entered and groups and subtotals them by the first three letters of the activity name.

REVIEWED BY

Project Directors, Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Activity - All Undup (W/Deleted Clients)		
AIM Training		
	<i>Unduplicated Count - Total Units</i>	
		From: 01/01/2014 To: 06/06/2014
Activity	Clients	Units
AIM Training		
con/22/Deep Kettle/	1	1.00
Duplicated Sub Total For Congregate Meals: 1 clients, 1.00 units		
hdm/55/ma and pas/home made bananas	2	2.00
Duplicated Sub Total For Home Delivered Meals: 2 clients, 2.00 units		
Duplicated Count, Sum of Units for AIM Training	3	3.00
Unduplicated Count, Sum of Units for All: 8 3.00		

OKN514(N) Group Services With Est Clients

PURPOSE

To see the client and service numbers of group activities.

USER INSTRUCTIONS

Enter dates for a period of service. Select a provider name from the provider quick find list.

HOW DOES IT WORK

Aim adds the number of estimated clients and units of services of each activity of each provider for the selected AAA and date range entered and groups them by the first three letters of the activity names. Must be run by either a AAA or state office.

REVIEWED BY

Project Directors, Planners, AAA Directors

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

[OKS713](#)

SAMPLE:

Group Activity			
AIM Training			
<i>Participant Count - Total Units</i>			
		From: 01/01/2014	
		To: 06/06/2014	
Activity		Clients	Units
Student 1			
hdm/14/moore/			1.00
Participant Count, Sum of Units for Student 1		0	1.00
Student 2			
cgm/55/memorial/		23	1.00
Participant Count, Sum of Units for Student 2		23	1.00

OKN515(N) Numbers of Clients/Services by NAPIS Group

PURPOSE

To see the numbers of clients and services for a particular NAPIS group.

USER INSTRUCTIONS

Enter dates for the period of service. Select a provider name from the provider quick find list. Select a NAPIS Group (Taxonomy) selected from the NAPIS Group quick find list.

HOW DOES IT WORK

AIM counts clients and services of a selected provider and select NAPIS group for the date range entered.

RELATED REPORTS AND TYPES OF REPORTS

REVIEWED BY

Project Directors, Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Activity - All Undup (By NAPIS)			From: 01/01/2014
AIM Training			To: 06/06/2014
Congregate Meals			
Activity	Clients	Units	
AIM Training			
con/22/Deep Kettle/	1	1.00	
Duplicated Sub Total For con: 1 clients, 1.00 units			
Duplicated Count, Sum of Units for AIM Training	1	1.00	
Unduplicated Count, Sum of Units for All:		1	1.00

OKN516(N) Client/Service Numbers by Taxonomy (AAA Only)

PURPOSE

For AAA staff to see numbers of clients and services by taxonomy for each of their own providers.

USER INSTRUCTIONS

Enter dates for a period of service. Select a AAA from the provider quick find list.

HOW DOES IT WORK

AIM counts the clients and services by taxonomy from a AAA's providers. The AAA must be selected from the provider list in order to get output.

REVIEWED BY

Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Taxonomy All Undup by AAA

Run By: AIM Training

For the Period of: 1/1/2014 To 6/6/2014

	<u>Taxonomy</u>	<u>Undup Count</u>	<u>Units</u>	<u>Units Per Client</u>
AIM Training				
AIM Training				
	Congregate Meals	1	1.00	1.00
	Home Delivered Meals	2	2.00	1.00
Student 1				
	Home Delivered Meals	1	1.00	1.00
Student 2				
	Home Delivered Meals	2	2.00	1.00
Student 3				
	Caregiver Counseling/Support Gro	1	1.00	1.00

OKN517 (N) Number of Clients by Race/Poverty/Activity with Units

PURPOSE

USER INSTRUCTIONS

Enter dates for a period of service. Select a provider name from the provider quick find list

HOW DOES IT WORK

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Activity Report by Race with Units Above & Below Poverty

AIM Training

From: 01/01/2014

To: 06/12/2014

		White	African American	Hispanic	American Indian/ Alaskan	Asian/ Pacific Islander	Other	Total Units
<i>AIM Training</i>								
adv/79/alpha site/	Below Poverty	0	0	0	0	0	0	0
	Above Poverty	0	0	0	0	0	0	0
	Total Served	0	0	0	0	0	0	0
cho/17/Stoop Repair and More/	Below Poverty	0	0	0	0	0	0	0
	Above Poverty	0	0	0	0	0	0	0
	Total Served	0	0	0	0	0	0	0

OKN518(N) Numbers of Clients/Meals Paid by Title III E

PURPOSE

To see a list of supplemental meal services with numbers of clients and meals.

USER INSTRUCTIONS

Enter dates for a period of service.

HOW DOES IT WORK

AIM displays the number of meals for supplemental meal service activity grouped by provider for the current AAA.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

List of Supplemental Services

From: 4/1/2014 To: 6/12/2014

	Service Activity	Undup Clients	UoS
Aqing Service, Inc., Cleveland			
	Taxonomy: Home Delivered Meals		
NSIP	cgm/14/Noble/hb	1	43
Aqing Services, Canadian			
	Taxonomy: Home Delivered Meals		
NSIP	cgm/09/north/route/	7	279
NSIP	cgm/09/south/route/	1	40

OKN519 (N) Number of Clients by Race/Ethnicity

PURPOSE

To see the number of clients in each race.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Enter a 5-digit number for a zip code.

HOW DOES IT WORK

AIM counts the number of clients in each race/ethnicity for the zip code entered.

REVIEWED BY

Project Directors, Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Number of Clients by Race/Ethnicity within Zip Code: 74940

For: AIM Training

Race/Ethnicity	Unduplicated Clients
Other	2
Hispanic Ethnicity:	1

OKP600 (P) Care Giver Demographic Two-Year Comparison

PURPOSE

Intended to support RFP responses and building Area Plans. To review the difference in demographics between two consecutive years.

USER INSTRUCTIONS

Enter dates for first period of service. Enter dates for second period of service. Select a provider name from the provider quick find list.

HOW DOES IT WORK

AIM actually runs two reports. It counts the number of clients in each demographic category for each date range and then displays them side-by-side.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

[OKP610](#), [OKN506](#), [OKN501](#), [OKN500](#)

SAMPLE

Two Year Comparison of Client Demographics

For Nutrition

Total Unduplicated Count For 2011: 30575 For 2012: 33921

Demographic Type	FY 2011			FY 2012		
	Undup Count	Percentage		Undup Count	Percentage	
Age 55 - 59	538	1.76	%	730	2.15	%
Age 60 - 64	1392	4.55	%	1913	5.64	%
Age 65 - 69	2898	9.48	%	3580	10.55	%
Age 70 - 74	4387	14.35	%	4995	14.73	%
Age 75 - 79	4796	15.69	%	5321	15.69	%
Age 80 +	14588	47.71	%	14979	44.16	%
Asian	22	0.07	%	30	0.09	%
Hawaiian/Pacific Isl	26	0.09	%	50	0.15	%
Race Missing	58	0.19	%	52	0.15	%
Other	322	1.05	%	431	1.27	%
2 or more Races	88	0.29	%	84	0.25	%
African American	1653	5.41	%	1928	5.68	%
American Indian/Alas	821	2.69	%	1094	3.23	%
White	27585	90.22	%	30252	89.18	%
Hispanic	376	1.23	%	522	1.54	%
Widowed	7260	23.74	%	8052	23.74	%
Single	2106	6.89	%	2445	7.21	%

OKP602 (P) Fed Fiscal Yr Expenditure Comparison by AAA

PURPOSE

Compare the money spent on services for two consecutive years.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Enter a 4-digit number for the first year. Enter a 4-digit number for the second year.

HOW DOES IT WORK

AIM compiles totals of Match and Title III (Federal) expenditures by taxonomy and calculates the percentage differences between the two entered years. AIM can only

access information for years that have completed NAPIS reports. The 4-digit numbers are federal fiscal years.

REVIEWED BY
 Planners, AAA Directors
 Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Expenditure Comparison For 2012/2013

Differences of 10% or more either plus or minus may require explanation.

Service	All Funds Including Match			Federal Funds (OAA T III)		
	2012	2013	% Diff	2012	2013	% Diff
3. Chore	\$7,127.09	\$5,228.90	-27 %	\$5,707.27	\$2,088.27	-63 %
4. Home Delivered Meals	\$497,614.32	\$407,987.70	-18 %	\$222,878.78	\$160,228.45	-28 %
7. Congregate Meals	\$1,471,038.50	\$1,132,736.50	-23 %	\$518,344.91	\$274,758.24	-47 %
8. Nutrition Counseling	\$5,940.00	\$2,822.00	-52 %	\$2,789.43	\$2,466.20	-12 %
10. Transportation	\$36,083.59	\$46,700.85	23 %	\$28,804.59	\$31,632.40	9 %
11. Legal Assistance	\$11,989.01	\$17,820.88	33 %	\$9,830.99	\$13,713.53	28 %
12. Nutrition Education	\$11,215.00	\$1,125.00	-90 %	\$5,441.38	\$1,068.75	-80 %
13. Information and Assistance	\$28,756.28	\$33,982.45	15 %	\$22,177.59	\$26,189.23	15 %
14. Outreach	\$351,052.32	\$268,420.58	-24 %	\$225,071.73	\$149,787.76	-33 %
17. Health Promotion	\$14,912.31	\$13,598.97	-9 %	\$12,523.34	\$11,500.15	-8 %
16. Education and Training	\$9,411.83	\$7,745.87	-18 %	\$7,550.41	\$4,989.94	-34 %
18. Home Repair	\$4,445.95	\$3,103.19	-30 %	\$3,565.68	\$1,890.49	-47 %

OKP603(P) Data Analysis on a Provider

PURPOSE
 To prepare for a site visit.

USER INSTRUCTIONS
 Select a provider name from the provider quick find list.

HOW DOES IT WORK

AIM provides numbers on each statement/question for the selected provider.

REVIEWED BY

Project Directors, Planners, AAA Directors

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

[OKS712](#),

SAMPLE

Provider Data Analysis General Breakdown

AIM Training

The database has a total of 8 active clients.

2 client(s) served within the last 3 months have/has only one assessment on record.

0 client(s) served within the last 3 months have/has service entries with zero units.

0 client(s) are/is Active whose last service was at least 2 years ago.

170 client(s) have/has no last name.

2 client(s) have/has unrealistically old birth date(s).

1 client(s) have/has future birth date(s).

0 client(s) have/has unrealistically old service date(s).

1 client(s) have/has services with future date(s).

0 client(s) have/has unrealistically old assessment date(s).

0 client(s) have/has assessment(s) with date(s) in the future.

0 client(s) received Home Delivered Meals within the last 3 months and have/has no street address.

2 client(s) do/does not have Ethnicity set to anything.

0 client(s) served within the last 2 months are/is Inactive.

0 client(s) have/has services of either a meal or homemaker within the last 3 months and have/has no assessments.

2 client(s) are/is between age 21 and 59.

1 client(s) are/is under 21.

3 client(s) are/is 100 or older.

2 client(s) have caregiver checked but have/has no care receiver relationship.

2 client(s) have/has county fields that are/is either blank or have/has misspelled county name(s).

2 client(s) live in counties that the provider AAA should not be serving.

0 Activity name(s) are/is constructed incorrectly.

OKP604 (P) S56A Staffing Report

PURPOSE

To view a AAA's staffing numbers for a particular fiscal year.

USER INSTRUCTIONS

Enter a 4-digit number for the federal fiscal year. Select as s56A Provider from the provider quick find list.

HOW DOES IT WORK

AIM searches for the s56A report according to the federal fiscal year entered and the prover selected. If the fiscal year in the s56A screen is blank or incorrect the report will not function properly.

REVIEWED BY

Planners, AAA Directors

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

AAA Staffing Profile For FFY 2013



FTE Type	Total FTEs	Minority FTEs	Total Providers
S56a Aaastaff Exec:	1	0	S56a Tot Prov: 8
S56a Aaastaff Planning:	2	0	S56a Tot Min Prov: 0
S56a Aaastaff Development:	0	0	S56a Tot Rural Prov: 7
S56a Aaastaff Admin:	1	0	Focal Points/Senior Centers
S56a Aaastaff Serv Del:	3	0	Focal Points: 55
S56a Aaastaff Access Coord:	1	1	Total Senior Centers: 31
S56a Aaastaff Other:	0	0	Senior Centers in PSA: 31
S56a Aaastaff Clerical:	0	0	OAA Senior Centers: 17
S56a Aaastaff Volunteers:	0	0	

OKP605 (P) S56C Expenditures Report

PURPOSE

To view a Provider's month's expenditure entry.

USER INSTRUCTIONS

Select a report from the quick find list (First Name shows the AAA name, Middle Name shows whether the report is Quarterly or Monthly and DOB is the ending date of the report).

Select the name of the S56C provider from the provider quick find list.

HOW DOES IT WORK

AIM reproduces the image of an S56C screen for the report selected from the quick find. In addition, the report includes columns for units entered and unit cost for the month.

REVIEWED BY

Planners, AAA Directors

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

S56C Expenditures Report for the Period Ending: 7/31/2013

Last Updated: 00/00/0000

Type of Report: Monthly

Provider: S56C

Report Period: July 2013

AAA:

Fed Fiscal Year: 2014

Prepared By: Accountant S56C

Taxonomy	Total Service Expenditure	Units	Cost Per Unit	Total T-III	OAA Title III Expenditures (\$) By Part (Federal Funds)					Program Income
					B	C1	C2	D	E	
Personal Care	\$0.00			\$0.00	\$0.00				\$0.00	\$0.00
Homemaker	\$25,079.07	1741.49	\$14.4	\$21,317.21	\$21,317.21				\$0.00	\$0.00
Chore	\$0.00			\$0.00	\$0.00				\$0.00	\$0.00
Home Delivered Meals	\$108,409.31	22196.00	\$4.88	\$88,001.05			\$88,001.05		\$0.00	\$4,878.6
Adult Day Care	\$0.00			\$0.00	\$0.00				\$0.00	\$0.00
Case Management	\$0.00			\$0.00	\$0.00				\$0.00	\$0.00
Congregate Meals	\$125,271.31	10554.00	\$11.87	\$99,275.95		\$99,275.95			\$0.00	\$8,476.0
Nutrition Counseling	\$850.00	17.00	\$50.00	\$722.50	\$0.00	\$722.50	\$0.00		\$0.00	\$0.00
Assisted Transportation	\$0.00			\$0.00	\$0.00				\$0.00	\$0.00
Transportation	\$17,256.13	6969.00	\$2.48	\$10,377.27	\$10,377.27				\$0.00	\$5,047.5
Legal Assistance	\$4,498.12	142.25	\$31.62	\$3,823.40	\$3,823.40				\$0.00	\$0.00
Nutrition Education	\$1,100.00	946.00	\$1.16	\$935.00	\$0.00	\$935.00	\$0.00		\$0.00	\$0.00

OKP606 (P) Zip Codes that are Incorrect

PURPOSE

To see a list of clients that have non-Oklahoma zip codes in their records.

USER INSTRUCTIONS

Printed Documentation

Select a provider name from the provider quick find list

HOW DOES IT WORK

For the provider selected AIM compares the clients' zip codes to a list of known Oklahoma zip codes.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Incorrect Zip Codes						
AIM Training						
Name	Address	County	Zip	Phone	DOB	
Dreddie, Freddie	444 Sharp Edge Lane Stone	Cleveland	82188	(580) -	01/01/1977	
Hitchpost, Gallup	212 Stable --	Jefferson	79999	(918) 639-1212	01/22/1903	

OKP607 (P) Compare Expenditures Between Two AAAs

PURPOSE

To see a comparison of all expenditures between two AAAs for a particular federal fiscal year.

USER INSTRUCTIONS

Enter a 4-digit number for the federal fiscal year.
Select the first AAA name from the list.
Select the second AAA name from the AAA list.

HOW DOES IT WORK

AIM can only report on years that have completed NAPIS reports.

REVIEWED BY

Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Compare Expenditures of [NAPIS Group] AAA and [NAPIS Group] AAA for FY2012

AAA	Description	With Match	B	C1	C2	D	E
[NAPIS Group]	1. Personal Care	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00
[NAPIS Group]	1. Personal Care	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00
[NAPIS Group]	2. Homemaker	\$222,686.00	\$155,870.00	\$.00	\$.00	\$.00	\$.00
[NAPIS Group]	2. Homemaker	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00
[NAPIS Group]	3. Chore	\$.00	\$.00	\$.00	\$.00	\$.00	\$.00
[NAPIS Group]	3. Chore	\$7,127.09	\$5,707.27	\$.00	\$.00	\$.00	\$.00
[NAPIS Group]	4. Home Delivered Meals	\$1,141,854.00	\$.00	\$.00	\$728,861.00	\$.00	\$.00
[NAPIS Group]	4. Home Delivered Meals	\$497,614.32	\$.00	\$.00	\$222,878.78	\$.00	\$.00

OKP608 (P) Compare AAA Expenditures for a Service

PURPOSE

To compare spending on a particular type of service among all AAAs

USER INSTRUCTIONS

Select a NAPIS Group (Taxonomy) selected from the NAPIS Group quick find list.
Enter a 4-digit number for a federal fiscal year.

HOW DOES IT WORK

AIM lists all AAAs' expenditures for the NAPIS Group selected. AIM can only display for years that a NAPIS report has been completed.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Compare AAA Expenditures on 11. Legal Assistance for FY2012

AAA	With Match	B	C1	C2	D	E
Areawide	\$85,931.00	\$73,016.00	\$0.00	\$0.00	\$0.00	\$0.00
SODA	\$49,605.08	\$42,268.02	\$0.00	\$0.00	\$0.00	\$0.00
INCOG	\$49,216.27	\$41,468.25	\$0.00	\$0.00	\$0.00	\$0.00
Grand Gateway	\$46,213.98	\$39,281.89	\$0.00	\$0.00	\$0.00	\$0.00
EODD	\$31,501.35	\$24,145.00	\$0.00	\$0.00	\$0.00	\$0.00
OEDA	\$28,738.40	\$19,665.92	\$0.00	\$0.00	\$0.00	\$0.00
SWODA	\$26,377.46	\$21,753.85	\$0.00	\$0.00	\$0.00	\$0.00
NODA	\$24,564.41	\$14,890.66	\$0.00	\$0.00	\$0.00	\$0.00
COEDD	\$20,928.90	\$15,458.19	\$0.00	\$0.00	\$0.00	\$0.00
KEDDO	\$16,416.21	\$15,590.32	\$0.00	\$0.00	\$0.00	\$0.00
ASCOG	\$11,989.01	\$9,830.99	\$0.00	\$0.00	\$0.00	\$0.00

OKP609(P) Compare Provider Units for a Service

PURPOSE

To compare units of a particular type of service among all the Providers that recorded services for it.

USER INSTRUCTIONS

Select a NAPIS Group (Taxonomy) from the NAPIS Group quick find list. Enter dates for a period of service.

HOW DOES IT WORK

For the NAPIS Group selected and the date range entered, AIM lists all providers with each one's numbers of clients and units.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Provider Service Comparison Legal Assistance

From: 9/1/2013 To: 9/30/2013

Provider	Units	Clients	AAA
Areawide Legal Svs/Ed	186.96	122	Areawide
INCOG Legal Svs/Ed	138.40	129	INCOG
EODD Legal Svs/Ed	108.35	81	EODD
SODA Legal Svs/Ed	90.52	26	SODA
SWODA Legal Svs/Ed	61.23	25	SWODA
Grand Gateway Legal Svs/Ed	54.05	36	Grand Gateway
NODA Legal Svs/Ed	35.60	20	NODA
OEDA Legal Svs/Ed	29.41	11	OEDA
COEDD Legal Svs/Ed	26.10	22	COEDD
KEDDO Legal Svs/Ed	25.30	15	KEDDO
ASCOG Legal Svs/Ed	23.20	28	ASCOG

OKP610(P) Population Demographics by County/Service

PURPOSE

To collect numbers in preparation for preparing RFPs and Area Plans

USER INSTRUCTIONS

Log onto the database as a AAA. Select your AAA from the list. Enter a 4-digit number for the state fiscal year.

HOW DOES IT WORK

AIM looks for the demographic information for counties in your PSA. The report can only provide information two months after a completed fiscal year.

REVIEWED BY

Planners, AAA Directors

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

[OKP600](#), [OKN506](#), [OKN501](#), [OKN500](#)

SAMPLE

Population Demographics of Persons Served Age 60 and Over

ASCOG AAA

For SFY 2012

County/Service	Total	Female	Male	African American	American Indian	Asian	Hispanic	Poverty	Poverty Minority	Limited English	Rural	Living Alone	GPRG
Caddo													
SRC Information Services	0	0	0	0	0	0	0	0	0	0	0	0	0
SRC Respite Care	2	0	2	0	1	0	0	0	0	0	2	0	0
Transportation	7	6	1	0	0	0	0	4	0	0	6	6	0
Comanche													
Caregiver Access Assista	5	3	2	1	0	0	0	0	0	0	0	0	0
Caregiver Counseling/Sup	0	0	0	0	0	0	0	0	0	0	0	0	0
Caregiver Information Se	0	0	0	0	0	0	0	0	0	0	0	0	0
Caregiver Respite Care	30	21	9	6	0	0	0	0	0	0	0	1	0

OKP611(P) Two Year Unit Comparison/Fed Fiscal Yrs

PURPOSE

To compare two consecutive years of clients and units served.

USER INSTRUCTIONS

Select a AAA name selected from the provider quick find list. Enter a 4-digit number for first fiscal year to compare. Enter a 4-digit number for the second fiscal year to compare.

HOW DOES IT WORK

AIM displays numbers of clients and units for the two years entered and compares the numbers with a percentage of variance for each type of service for the selected AAA.

REVIEWED BY

Project Directors, Planners, AAA Directors
Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

[OKP605](#)

SAMPLE

Two Year Service Unit and Client Count Comparison For Federal Fiscal Years

On: ██████████ Nutrition

Run By: ██████████ AAA

Service Type	Variance	Units of Service		Unduplicated Clients	
		2011	2012	2011	2012
Assisted Transportation	100%	351.00	.00	3	0
Caregiver Counseling/Support Groups/Care	96.45%	10.00	282.00	1	4
Caregiver Information Services	100%	.00	1.00	0	1
Caregiver Respite Care	94.56%	213.00	3,912.07	122	103
Chore	83.64%	9.00	55.00	9	6
Congregate Meals	2.47%	251,669.00	258,034.00	2,172	2,081
Coordination of Services	43.29%	9,757.25	5,533.00	8	16
Education or Training	10%	9.00	10.00	3	9
Health Promotion	79.87%	298.00	60.00	1	12
Home Delivered Meals	0.64%	126,886.00	126,076.00	1,028	822
Home Repair	22.22%	14.00	18.00	14	18
Information and Assistance	84.27%	14.00	89.00	2	17
Nutrition Counseling	50%	8.00	4.00	3	4

OKP612 (P) Assessments with Future Dates

PURPOSE

To view a list of assessments with dates that have not yet occurred.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Open and delete each assessment with a future date. Re-enter with the correct date if necessary.

HOW DOES IT WORK

For the provider selected AIM lists each assessment where the assessment date future to the current date.

REVIEWED BY

Project Directors, Planners

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Assessments With Dates That Have Not Yet Occured

AIM Training

Name	Street Address	Incorrect Assess Date
Hitchpost, Gallup	212 Stable Horsey 79999	10/01/2018

OKP613 -- (P) S56C Spending Report Status

PURPOSE

To determine whether AAAs have initiated all their required expenditure reports. It does not necessarily indicate that the detailed expenditure screen is properly completed.

USER INSTRUCTIONS

Select a provider from the provider quick find list.

HOW DOES IT WORK

You must be logged onto the S56 database in AIM. AIM lists all instances of expenditure records identified as monthly or quarterly and where at least one total expenditure has been entered for the provider selected.

REVIEWED BY

Project Directors, Planners, AAA Directors

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

S56C [OKP605](#)

SAMPLE

S56C Expenditure Report Status



Name	Report Type	End Date	Last Updated	Quarter/Month	
Accountant	S56C	Quarterly	12/31/2010	11/29/2011	Oct - Dec
Accountant	S56C	Quarterly	3/31/2011	11/29/2011	Jan - Mar
Accountant	S56C	Quarterly	6/30/2011	11/29/2011	Apr - Jun
Accountant	S56C	Quarterly	9/30/2011	11/29/2011	Jul - Sep
Accountant	S56C	Quarterly	12/31/2011	4/19/2012	Oct - Dec
Accountant	S56C	Quarterly	3/31/2012	6/11/2012	Jan - Mar
Accountant	S56C	Quarterly	6/30/2012	1/18/2013	Apr - Jun
Accountant	S56C	Quarterly	9/30/2012	1/18/2013	Jul - Sep
Accountant	S56C	Quarterly	12/31/2012	7/22/2013	Oct - Dec
Accountant	S56C	Quarterly	3/31/2013	7/23/2013	Jan - Mar
Accountant	S56C	Quarterly	6/30/2013	8/9/2013	July
Accountant	S56C	Monthly	7/31/2013	11/15/2013	July
Accountant	S56C	Monthly	8/31/2013	10/31/2013	August

OKP614 -- (P) Annual Unit and Cost Analysis

PURPOSE

To evaluate whether the units and expenditures entered for a service are reasonable and correct.

USER INSTRUCTIONS

Enter a 4-digit number for the fiscal year. Select a provider from the list.

HOW DOES IT WORK

For type of service AIM calculates the number of client, service units, total expenditures and unit cost for the selected provider and fiscal year entered. Field Reps typically use this report to prepare for site visits.

REVIEWED BY

Project Directors, Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

s56c [OKP605](#)

SAMPLE

Unit and Cost Analysis on for FFY 2012						
Service Type	Unduplicated Clients	Estimated Group Attendance	Group Units	Individual Units	All Funds	Cost Per Unit
1. Personal Care		0	0	.00	\$.00	\$.00
2. Homemaker		0	0	.00	\$.00	\$.00
3. Chore	3	0	0	89.00	\$7,127.09	\$80.08
5. Adult Daycare		0	0	.00	\$.00	\$.00
6. Case Management		0	0	.00	\$.00	\$.00
8. Nutrition Counseling	19	0	0	25.00	\$5,940.00	\$237.60
9. Assisted Transportation		0	0	.00	\$.00	\$.00
10. Transportation	147	0	0	28,916.00	\$36,083.59	\$1.25
11. Legal Assistance	159	0	0	591.44	\$11,989.01	\$20.27
12. Nutrition Education	2,288	0	0	8,883.00	\$11,215.00	\$1.26
13. Information and Assistance	256	0	0	408.00	\$28,756.28	\$70.48
14. Outreach	1,732	0	0	1,874.00	\$351,052.32	\$187.33
17. Health Promotion	55	0	0	385.00	\$14,912.31	\$38.73
15. Advocacy Representation		0	0	.00	\$.00	\$.00
16. Education and Training	12	0	0	398.00	\$9,411.83	\$23.65
18. Home Repair	8	0	0	11.00	\$4,445.95	\$404.18
19. Coordination of Service	5	0	0	2,909.00	\$70,576.01	\$24.26
20. Counseling/Support Groups/Training CG	11	0	0	29.00	\$2,063.69	\$71.16
21. Respite Care CG	56	0	0	1,987.50	\$25,422.17	\$12.79
22. Supplemental Services CG		0	0	.00	\$.00	\$.00

OKS700(S) Meal Roster, Monthly-Landscape w/o ssn

PURPOSE

Provide a tool for service sites to record and track clients' services.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Select one or more activity names from the activity quick find list.

HOW DOES IT WORK

AIM lists clients' names of service activities that are also rosters.




REVIEWED BY

Project Directors

RELATED REPORTS AND TYPES OF REPORTS

Sign in rosters [OKC101](#), [OKC102](#), [OKC103](#), [OKC106](#)

SAMPLE

Activity Roster for: AIM Training																													
Act: hdm/55/ma and pas/ho Grp: AIM Training Pgm: AIM Training FS:- NAPIS: Home Delivered Meals																													
Start Date: November, 25 2013										Instructor:										Act Barcode:  992233									
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
Doe, Needsome																													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
Hitchpost, Gallup																													

OKS701(S) Meal Roster, Monthly-Landscape with DOB

PURPOSE

Provide a tool for service sites to record and track clients' services.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Select one or more activity names from the activity quick find list.

HOW DOES IT WORK

AIM lists clients' names of service activities that are also rosters and includes the birth date next to each name.




REVIEWED BY

Project Directors

RELATED REPORTS AND TYPES OF REPORTS

Sign in rosters [OKC101](#), [OKC102](#), [OKC103](#), [OKC106](#)

SAMPLE

Activity Roster for: AIM Training	
Act: hdm/55/ma and pas/ho Grp: AIM Training Pgm: AIM Training FS:- NAPIS: Home Delivered Meals	
Start Date: November, 25 2013	Instructor:  992233
 Doe, Needsome	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 DOB: 2/28/1923
 Hitchpost, Gallup	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 DOB: 1/22/1903

OKS702(S) Meal Roster, Monthly-Landscape (medicaid)

PURPOSE

Provide a tool for service sites to record and track clients' services.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Select one or more activity names from the activity quick find list.

HOW DOES IT WORK

AIM lists clients' names of service activities that are also rosters. Instead of Unique ID, the Medicaid number is included.

REVIEWED BY

Project Directors


RELATED REPORTS AND TYPES OF REPORTS

Sign in rosters [OKC101](#), [OKC102](#), [OKC103](#), [OKC106](#)

SAMPLE

Activity Roster for: AIM Training

Act: hdm/55/ma and pas/ho Grp: AIM Training Pgm: AIM Training FS:- NAPIS: Home Delivered Meals

Start Date: November, 25 2013	Instructor:	Act Barcode:  992233
123456789	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	
Doe, Needsome	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	
Hitchpost, Gallup	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	

OKS703 -- (S) Meal Roster, Monthly-Landscape (Mobile Meals)

PURPOSE

Provide a tool for service sites to record and track clients' services.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Select one or more activity names from the activity quick find list.

HOW DOES IT WORK

AIM lists clients' names of service activities that are also rosters.

REVIEWED BY

Project Directors

RELATED REPORTS AND TYPES OF REPORTS

Sign in Rosters [OKC101](#), [OKC102](#), [OKC103](#), [OKC106](#)

SAMPLE

OKS704(S) Meal Roster, Monthly-Landscape (no names)

PURPOSE

Provide a tool for service sites to record and track clients' services when participants are not already on a roster.

USER INSTRUCTIONS

Select a provider name from the provider quick find list. Select one or more activity names from the activity quick find list.


HOW DOES IT WORK

AIM lists clients' names of service activities that are also rosters to produce a blank meal service sheet where names can be written in.

REVIEWED BY
Project Directors

RELATED REPORTS AND TYPES OF REPORTS
Sign in rosters [OKC101](#), [OKC102](#), [OKC103](#), [OKC106](#)

SAMPLE

Activity Roster for: AIM Training																													
Act: hdm/55/ma and pas/ho Grp: AIM Training Pgm: AIM Training FS:- NAPIS: Home Delivered Meals																													
Start Date: November, 25 2013										Instructor:										Act Barcode:  992233									
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30

OKS707(S) Service Activities with Late Entry Dates

PURPOSE

To see when services are being entered after the data entry deadline date.

USER INSTRUCTIONS

Enter dates for the period of service. Select a provider name from the provider quick find list. Run it on the service month.

HOW DOES IT WORK

This is strictly a monthly report for a month that services have been entered. Using a date range other than the first and last days of a month may result in erroneous information. Field Reps typically use this report to prepare for site visits.

REVIEWED BY
Project Directors, Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

List of Services and Entry Dates by Provider			
From: 10/1/2013 To: 10/31/2013			
Run by: AIM Training			
Run on: AIM Training			
Activity	Date Served	Date Entered	Units
Home Delivered Meals			
hdm/55/ma and pas/home made banan.	10/15/13	11/25/13	1.00

OKS709 -- ADvantage Meal Roster Monthly Landscape w/o ssn

PURPOSE

Provide a tool for service sites to record and track clients' services.

USER INSTRUCTIONS

Select a provider from the provider quick find. Select one or more activity names from the activity quick find.

HOW DOES IT WORK

AIM lists clients' names of service activities that are also rosters.




REVIEWED BY

Project Directors

RELATED REPORTS AND TYPES OF REPORTS

sign in rosters [OKC101](#), [OKC102](#), [OKC103](#), [OKC106](#)

SAMPLE

ADvantage Activity Roster for: AIM Training		
Act: adv79/alpha site/ Grp: AIM Training Pgm: AIM Training FS:- NON OAA-III Eligable NAPIS: ADvantage/Medicaid Wai		
Start Date:	Instructor:	Act Barcode:
June, 11 2014		 996123
 Doe, Heedsome	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	
 Hitchpost, Gallup	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	

OKS712(S) Clients Not Lately Served

PURPOSE

To review a list of clients that have not been served since a particular date and consider them for deletion.

USER INSTRUCTIONS

Enter a date to mark the period of service. Select a provider name from the provider quick find list. Since care receivers often do not receive services, open the client of each one being consider for deletion to ensure that there is nno care giver/care receiver relationship.

HOW DOES IT WORK

By entering 09/01/2013 you will see a list of people who were served on or before that date but not since then.

REVIEWED BY

Project Directors
SAMPLE

Clients with Service Older than 9/1/2013

AIM Training

Name	Address	Gender	Birth Date	Status	Most Recent Service
Aggregate, For Training		Male	11/11/1811	Active	8/1/2013

OKS713(S) Group Services with Est Clients

PURPOSE

To review the number of Group Services entered for a particular time period. The group service report should be used in conjunction with the OKN509.

USER INSTRUCTIONS

Select one or more provider name from the provider quick find list. Enter dates for the period of service.

HOW DOES IT WORK

AIM lists the number of attendees for each event entered and groups them by Provider. Field Reps typically use this report to prepare for site visits.

REVIEWED BY

Project Directors, Planners, AAA Directors

RELATED REPORTS AND TYPES OF REPORTS

[OKN514](#)

SAMPLE

Group Services and Dates

Activity	Service Date	Attendees	# Events
AIM Training			
Caregiver Counseling/Support Groups/Caregiv			
cgt/12/duncin	04/01/2013	350	1
cgt/12/duncin	09/26/2013	88	1
cgg/55/CentralOHAI/REACH	09/26/2013	35	1
cgt/12/duncin	09/26/2013	214	1
cgg/55/Sunbeam/CaregiverSupport	10/28/2013	35	1
Caregiver Respite Care			
cgr/35/INCA/Prince	09/01/2013	138	1
Health Promotion			
hea/74/eastside	07/01/2013	178	1

OKS720(S) Client's Service List by County

PURPOSE

To review a list of clients of a particular service by county of residence.

USER INSTRUCTIONS

Select a AAA name from the AAA quick find list. Enter dates for the period of service.

HOW DOES IT WORK

AIM finds clients with services in the entered date range for the AAA selected and groups them by county. An issue with this report is that since most clients receive more than one type of service, this list is very long and difficult to manage.

REVIEWED BY

Project Directors

RELATED REPORTS AND TYPES OF REPORTS

SAMPLE

Client's Services Listed by County

AIM Training

Name	# Services	Service List
Jefferson Hitchpost, Gallup	2	SRC Supplemental Services, Home Delivered Meals

OKS738(S) Meal Numbers (S38 Monthly)

PURPOSE

To determine that the correct number of each type of meal was entered into the database.

USER INSTRUCTIONS

Enter dates for the period of service.

A provider name selected from the provider quick find list is the Provider that entered the meals

HOW DOES IT WORK

Understanding how the 738 works requires understanding where some of the information comes from. Days served and meals purchased and prepared are entered into a dummy client name S38(Provider Name) see [S38](#). The rows of information are grouped by county and sorted by site. And the meals served columns are directly related to the first three letters of the activity name. Therefore, it is absolutely essential for activity names to be formatted correctly. See [Activity Naming Standard](#). AIM counts meals in each column for each site. So, it is also essential for the site name to be spelled the same for each activity it is used in. The Other Meals column includes any type of non-title III meal entered into AIM. And HDM Participants 60+ include meals for activities that begin with cgm.

REVIEWED BY

Project Directors, Planners, AAA Directors

Field Reps typically use this report to prepare for site visits.

RELATED REPORTS AND TYPES OF REPORTS

Activity Rosters, OKC142, [OKC117](#), [OKC112](#)

SAMPLE

S38 Number of Meals Served Report

Project Name: AIM Training
 Agency Name: STATE OWNED
 Month & Year: SEP 2013

Average Number of Days Served Per Month:
 Eligible Meals Served This Month:
 Eligible Meals Served To Date (Same as NAPIS):

County/Site	Total Meals Prepared	Total Meals Purchased	Congregate Participants		Volun 60-	Total Cong	HDM Participants		Total HDM	Total NSIP	Guest 60-	Staff 60-	Other Meals	All Meals
			60+	60-			60+	60-						
Oklahoma														
<i>ma and pas/</i>	.00	.00	.00	.00	.00	.00	1.00	.00	1.00	1.00	.00	.00	.00	.00
County Total:	.00	.00	.00	.00	.00	.00	1.00	.00	1.00	1.00	.00	.00	.00	.00
Grand Total:	.00	.00	.00	.00	.00	.00	1.00	.00	1.00	1.00	.00	.00	.00	.00

Glossary

A

Activity:

Activity Group:

Activity Name:

Activity Roster:

ADL:

AIM:

Assessment:

Assessment Button:

Assessment Date:

Assessment Lock:

B

Barcode:

C

Care Receiver:

Caregiver:

Caregiver Relationship:

Client:

Client ID:

D

Delete Rec:

E

Ethnicity:

F

Field:

Funding Sour:

G

Group Service:

H

History:

I

IADL:

Import:

Import Wizard:

Information Memo:

Insert:

M

Menu:

N

NAPIS:

NAPIS Group:

NSIP:

P

Password:

Poverty:

Program Group:

Provider:

Q

Query Builder:

Quick Find:

Quick Link:

R

Reassessment Date:

Record:

Referral:

Remote Desktop:

S

Scanner:

Service:

Standard Case:

T

Tool Bar:

U

Unique ID:

User ID:

W

Waiting List:

Index

C

Connection 1

L

Locating Info..... 21