How-To Guide: Managing client records

Problem: When our agency queries for clients using “Service Unit Logging” or “Clients Receiving Service” we see clients whom we no longer serve.

Explanation: Client records should be maintained and kept current in order to keep all reports as current and accurate as possible. When clients cease receiving services, users should **disenroll** the clients’ service plans. If those clients are deceased, have moved out of the county, or (for any other reason) will no longer be served by *any agency* in your AAA, users should take the additional step of **deactivating** the client record. The three following examples give detailed steps.

Example 1: One of our clients will no longer be receiving service from our agency.

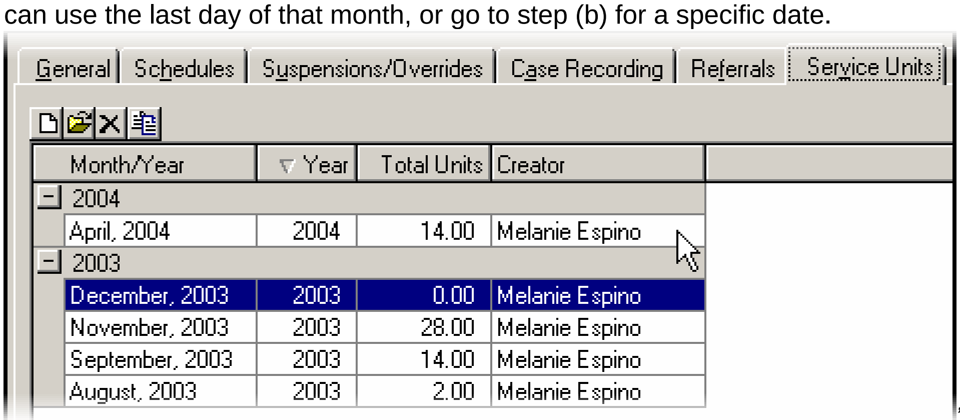
Steps: To complete this task, please follow these steps to disenroll the client’s care plan.

1. Open the client’s record. Click on “Care Plan.”

2. Double-click to open the service plan in question.

3. Determine which “End Date” should be used:

    a. Click on the “Service Units” tab and take note of the last month of service. You can use the last day of that month, or go to step (b) for a specific date.



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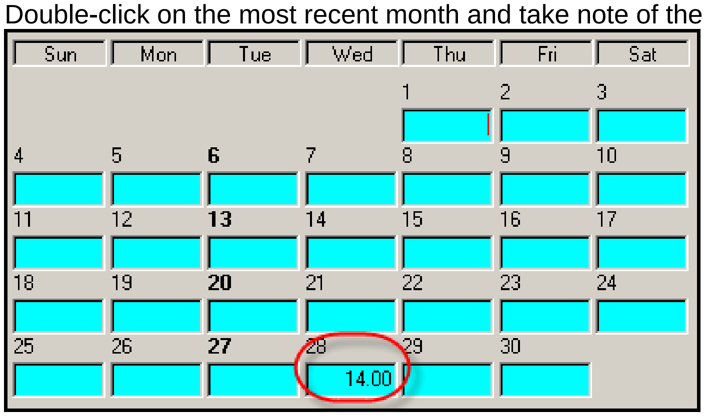
    b. Double-click on the most recent month and take note of the last date of service.



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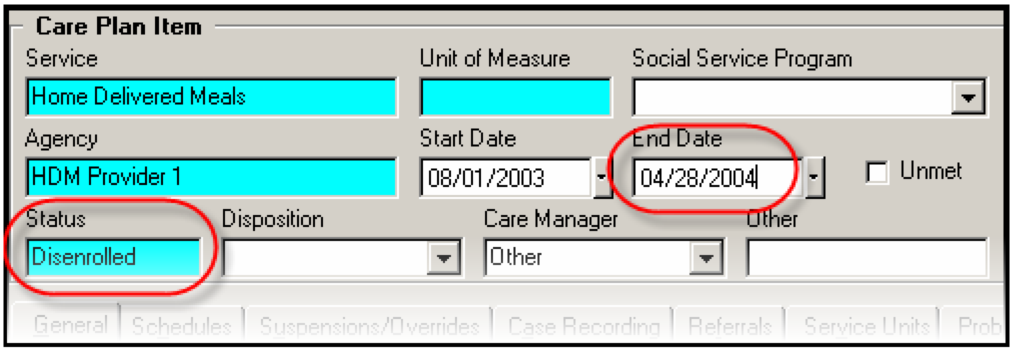
4. Enter an appropriate date in the “End Date” field and press “Save.”



** Note that the “Status” field changes to “Disenrolled.”*

The client will no longer appear on your queries for active clients, your roster, or your Service Unit Logging list.

Remember! If you have no indication that the client is deceased, permanently institutionalized or moved out of the PSA area, then it is possible that the client could be served by another agency in your PSA. DO NOT deactivate his client record.

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Example 2: When we do a “Service Unit Logging” query, several clients who no longer receive appear on the list.

Steps: To complete this task, please follow these steps:

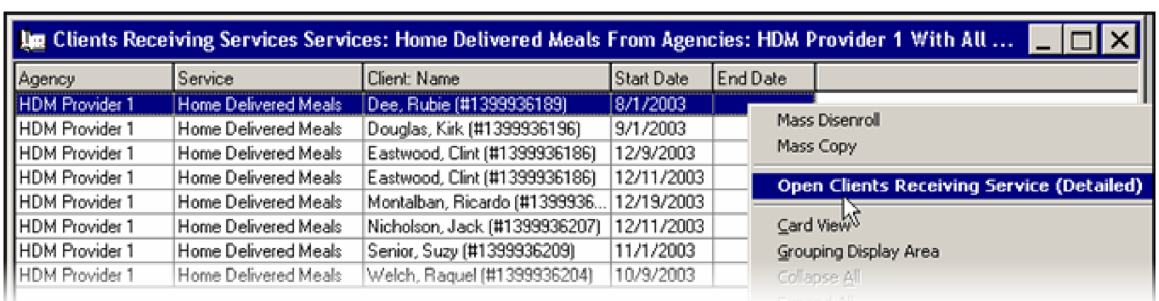
1. Starting at the Launcher, open the query called “Clients Receiving Service (Detailed.)”

2. Fill in the Service, Agency and today’s date in both the “Start Date” and “End Date” fields and click “Query.”

3. You will be presented with a list of all clients with active care plans as of today.

4. Select (highlight) one of the clients who are no longer receiving service. Right-click.

5. Choose “Open Clients Receiving Service (Detailed)”



** Note that the columns for the care plan Start Date and End Date can be added to this grid.*

You will be presented with the client’s care plan.

6. Follow steps 1-3 from Example 1 to disenroll the care plan.
** Note that when you save the change to the date, the client will “drop off” of your list since they are no longer eligible to receive service today.*

7. Repeat steps 4 and 5 for each client who should be disenrolled.

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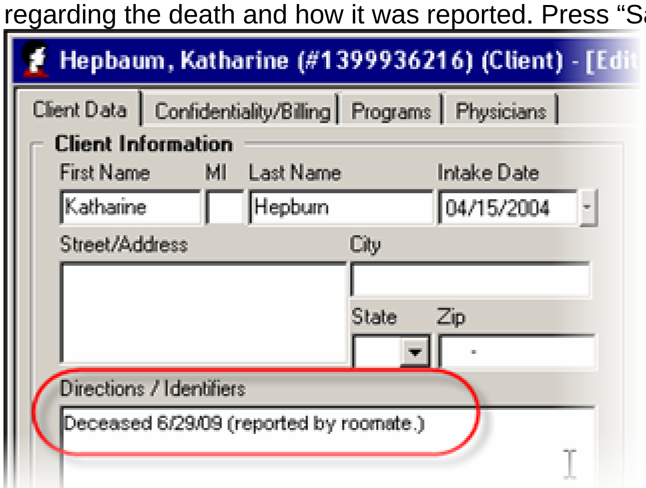
Example 3: My client just passed away. What should I do with his record?

When clients will no longer be eligible for services because of death, because they moved out of the county or because they were institutionalized, CareAccess recommends the following steps:

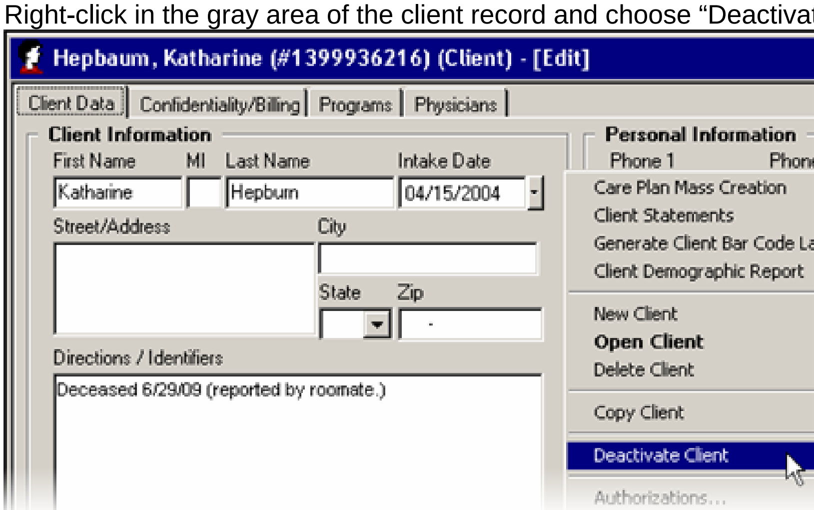
1. Disenroll the client's care plan following steps 1-3 from Example 1.

2. Notify any case managers or other providers who are serving the client. You can use Q's e-mail system to send a message to all of them at the same time.

3. Add a note in the "Directions/Identifiers" field on the client's Main Demographic Screen regarding the death and how it was reported. Press "Save."



4. Right-click in the gray area of the client record and choose "Deactivate client."



Still having Problems? Call the CareAccess support line for help. Please provide as much detail as possible about the steps you have already taken to resolve this problem.