AES
Adaptive Enterprise Solutions

...unlocking the dawn of better results for your organization

ENCOUNTER USER GUIDE

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Overview of Encounter Section

The Encounter section is available for Organizations to record information about encounters with people who are not currently Clients, whether they are walk-ins, phone calls, workshop participants, etc. Minimal information needs to be collected for each Encounter. Questions can be set up to collect additional information needed about each Encounter event, and different Activities can have different Question sets. Referrals can be made and confirmed, and appointments can be created and checked in.

To use the Encounter section, a Program Component must be created in the Program to be used and must have Standard Name = Encounter. Activities must be created in this Program Component, and must have Activity Type = Encounter and Standard Name = Encounter. Milestone(s) must also be created for the Program Component. The items included in the Type dropdown on the initial Encounter page are created on the Dropdowns page. The Locations dropdown pulls from the Locations page for the Organization.

Glossary

Application is the designation given to the collection of pages in the system used for a specific type of program, i.e. HMIS, Head Start, CSBG, or Weatherization; only one Application can be used at a time

Organization is an Agency set up to use the system

Program is a program within the Organization; it will include one or more Program Components, Target Goals and Activities

Program Component is a sub level of a Program designated to a narrowly focused process provided by Agency staff members to their Clients, it includes unique Activities and Milestones

Activity is a Staff performed service to assist Clients (case management, assessment, home visit); these are the Activities that Users will record in the system

Milestones are Interim Client results, those steps along the way to achieving the target outcome

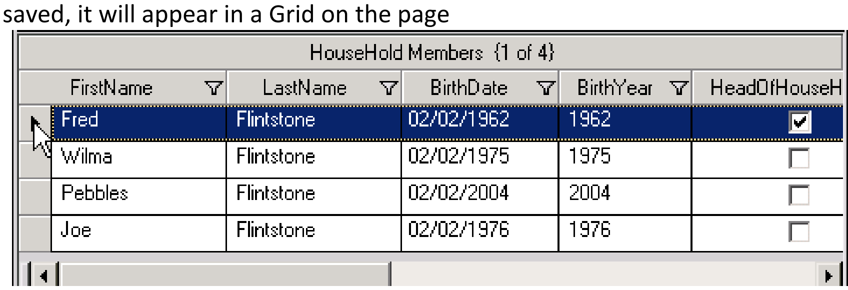
Common Elements to Encounter pages

NEW and SAVE buttons

1 Most pages will have a NEW button
   a This starts the process on most pages
   b If there are multiple NEW buttons, make sure you use the one in the section being used
2 Most pages have at least one SAVE button
   a Make sure to use the SAVE button located in the section in which you're currently working
3 If the User attempts to leave the page before saving, a warning will appear asking if you want to return to the page to save your work

Grids

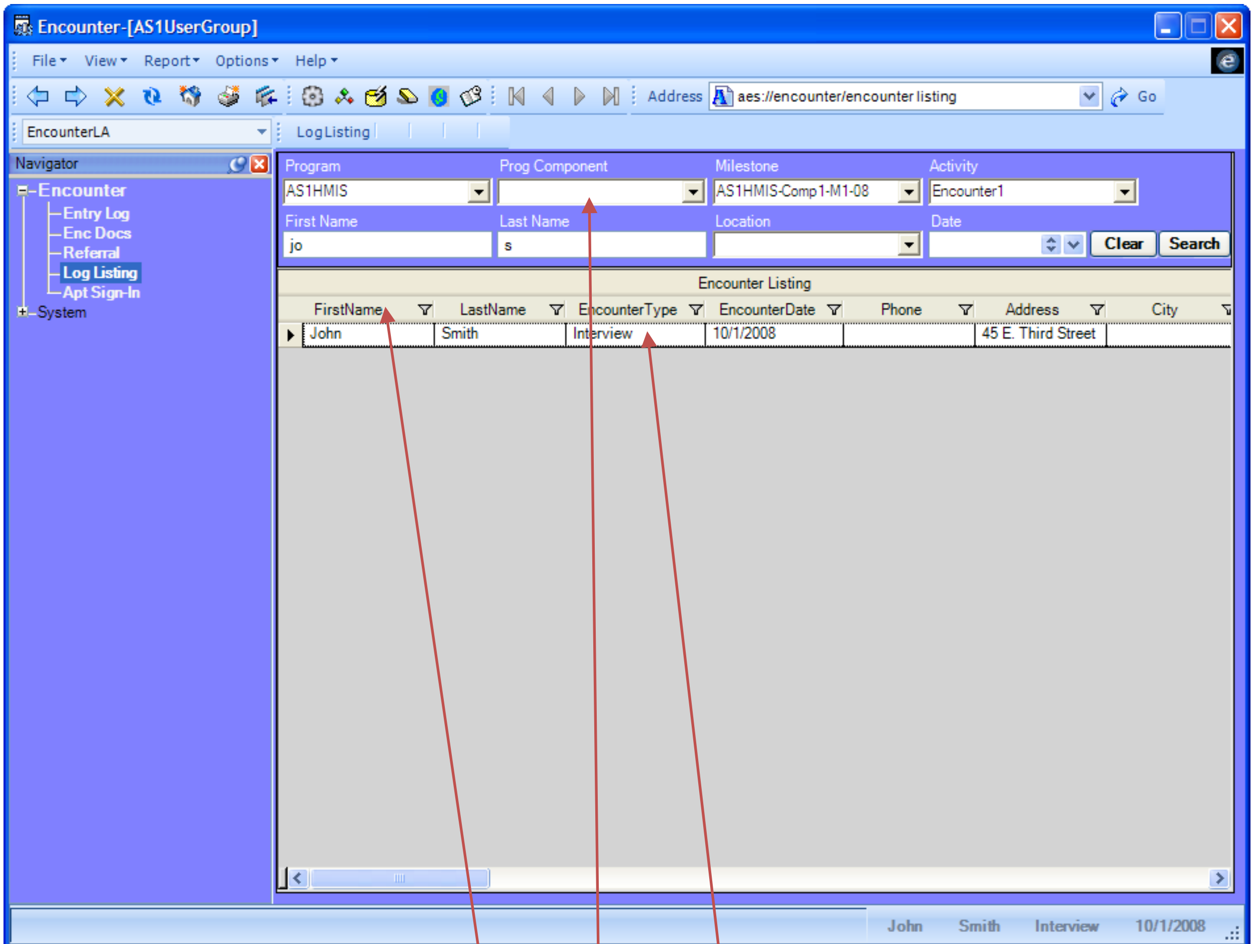
1 When information is created and saved, it will appear in a Grid on the page



2 To select a record click in the space to the left side of the row
   a The entire row should be highlighted blue when selected
3 Most Grids show the number of the active record and the total number of records (i.e. 1 of 4)
4 Sort the records in a Grid by clicking on any Column Heading
   a Click a second time to sort in the reverse order
5 Click the Filter icon located on the right side of many column headings to filter the list by any of the items that appear
6 Place the cursor at the right edge of a column heading until it becomes a cross, then drag it to the right or left to widen or narrow the column
7 Change the order of the columns by clicking on a column heading and dragging it to a new position
   a The columns will not stay in this order the next time you log in

Search for an existing Encounter Client

The Encounter Log Listing page lists all of the Encounter Clients in the system that the User has access to see based on Security Rights. Clients can be sorted by any existing criteria. Select the Client record in the CLIENT LISTING GRID to use on any other pages in the Central Intake section.



Navigating the Encounter Log Listing Page

- Search by any combination of parameters in top blue section
- All Clients matching search criteria will be displayed in the ENCOUNTER LISTING GRID
- Sort the records by clicking on any Column Heading

Quickly search for a Client

1 Enter any one or more of:
   a Program
   b Program Component
   c Milestone
   d Activity
   e First and/or Last Name
   f Location
   g Date
2 Click SEARCH button
   a All matching Clients will appear in ENCOUNTER LISTING GRID
3 To remove search criteria and start a new search, click CLEAR

➤ *Always start a Client entry with a search to avoid duplicate entries*

➤ *The entire name does not have to be entered; sometimes just a few letters will find the correct Client*

➤ *To see all Clients, just click SEARCH*

➤ *The Date defaults to today's date, so if the Client does not appear after a search, try deleting the date and searching again*

Sort Clients appearing in the Grid

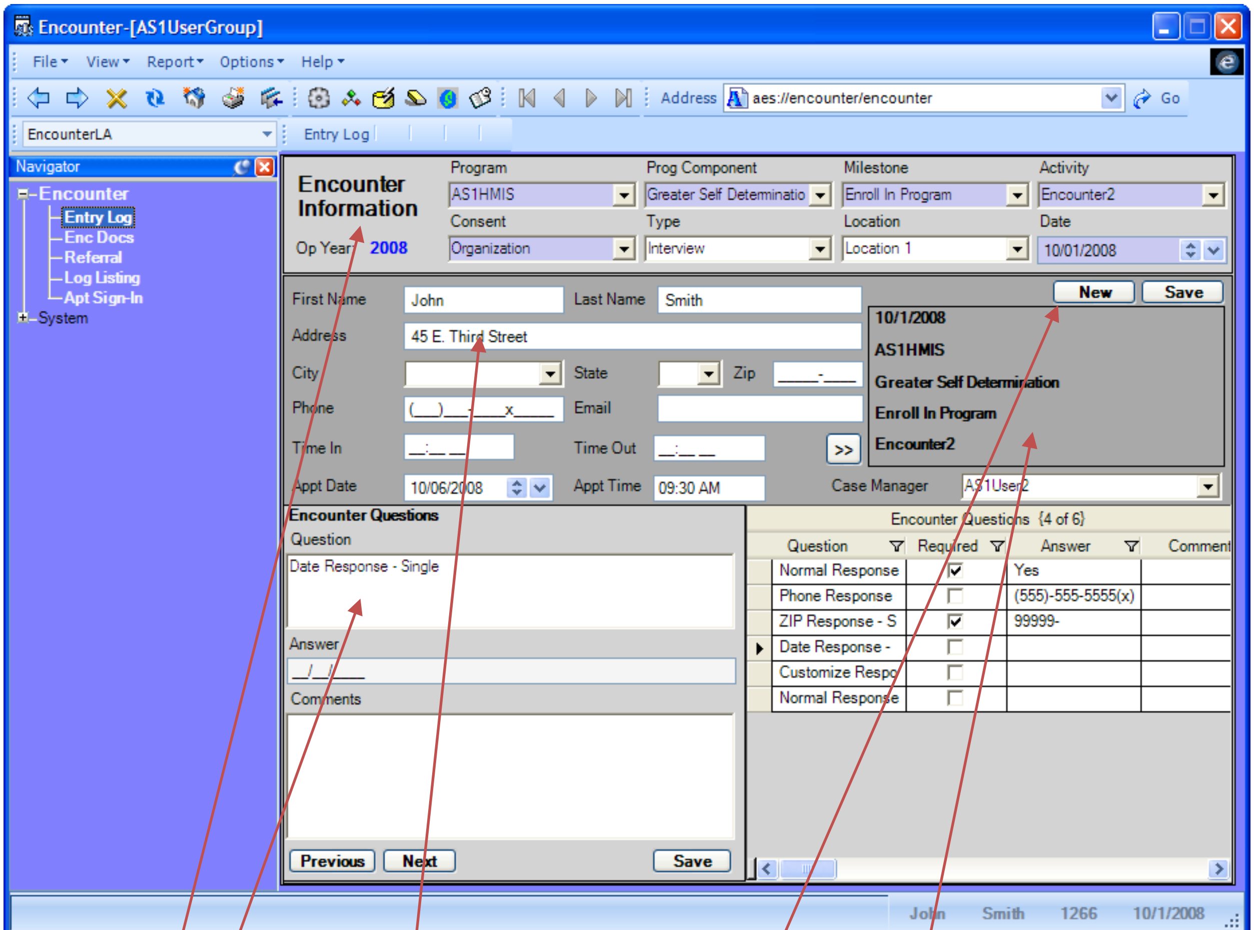
1 Click a Column Heading to sort by that item
   a A small arrow will be visible on the right side of the column heading showing the sort order
2 Click again to sort in the reverse order

Revise Columns by Width or order in Grid

1 Place cursor at right edge of Column Heading – it will turn into a cross
1 Drag to right or left until desired width
OR
2 Click a Column Heading to move to a different location in the Grid
3 Drag Column Heading to new location
Columns will not stay in this order o size for the next login

Create a new Encounter Client record

The Entry Log is the place to record the first encounter with a person. The Encounter Information showing at the top of the page can be filled in once, and will not have to be reentered while entering new Clients into the bottom section of the page.



Navigating the Entry Log Page

- Encounter Information selected in top section will stay throughout the session until changed
- The NEW button clears all contact fields and starts a new record
- Enter as much or as little contact information as needed
- Date, Program, Program Component, Milestone and Activity will appear to the right of contact information
- Questions can be set up to appear in bottom section

Create New Client record

1 Select Program at top of page
2 Select Program Component and Milestone
3 Select Activity
4 Select Consent Level
 a This determines who can access this record
5 Select Type of Activity
6 Select Location
7 Select Date
8 Click NEW button in middle section
9 Enter Client Name and contact information
10 Enter Appointment Date and time information
11 Select Case manager
12 Enter Appointment Date and Time information, if needed
13 Select Case manager
14 Click SAVE in middle section

If questions appear, answer Encounter Questions:

15 Select Answer in Answer dropdown or enter answer in Answer field
16 Click NEXT to jump to next question
 a PREVIOUS takes you to last question
17 Click SAVE beneath questions when finished

After saving the record, the Date, Program, Program Component, Milestone, Activity and Activity Type will appear on the right side of the page.

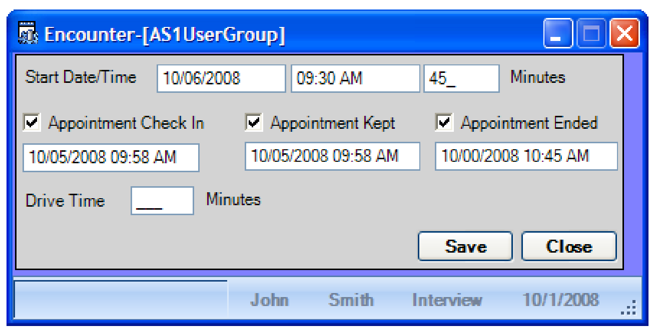
➤ *The information selected in the dropdowns in the top section will remain consistent while the User enters new walk-in clients*

➤ *No contact information is required, so Users can track as much or as little information as they need*

➤ *If the Activity was set up to use Resource Manager, the appointment will appear on the calendar in Resource Manager on the Resource, Date and Time selected here*

Confirm an Appointment

1 Click double arrow button
2 In the popup, Start Date and Time will appear automatically
3 Click to create a checkmark in Appointment Check In checkbox
4 Click to create a checkmark in Appointment Kept checkbox
5 Click to create a checkmark in Appointment Ended checkbox

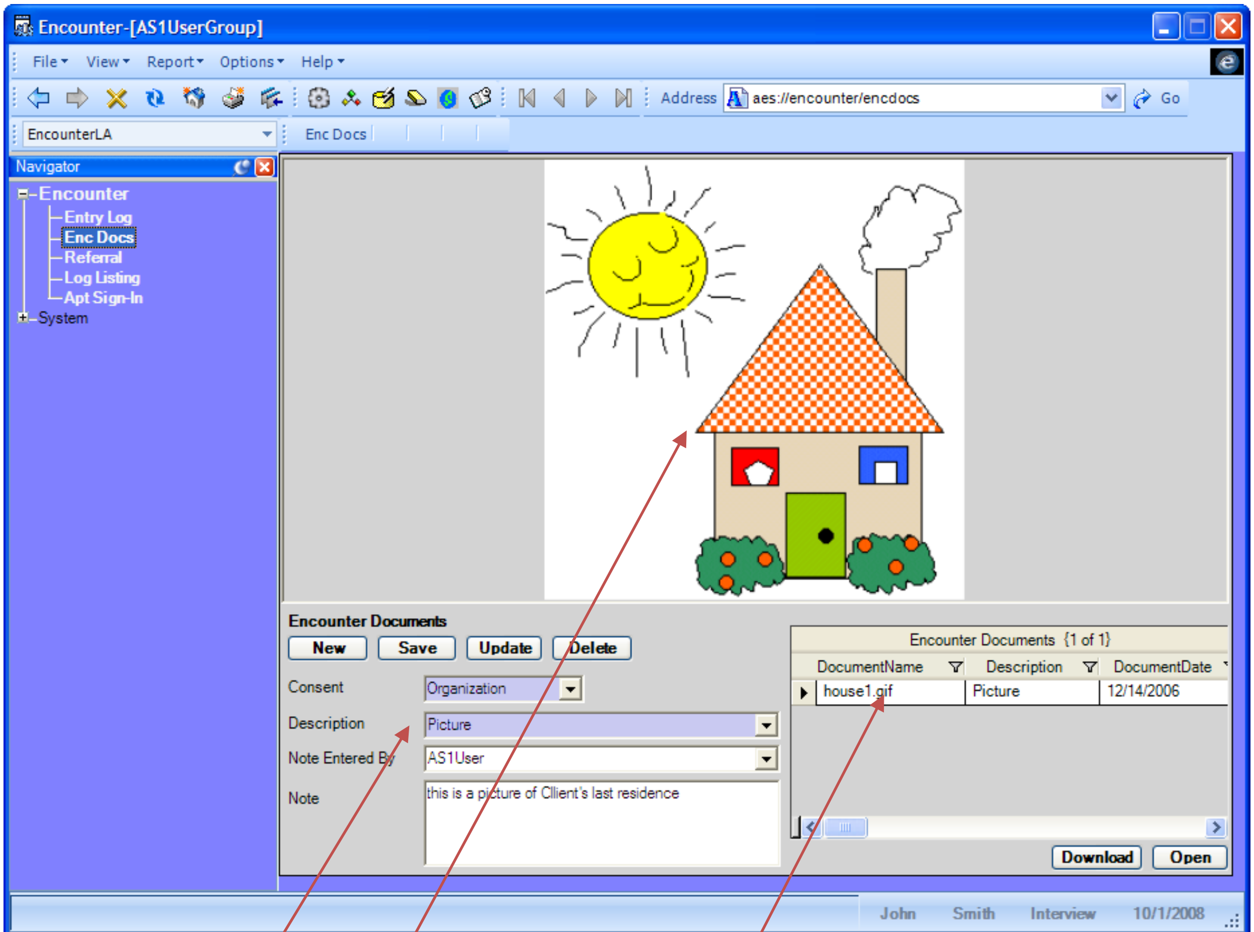


All Dates and Times appear automatically, but they can be changed if needed.

6 Enter number of minutes for Appointment
7 Click SAVE
8 Click CLOSE when finished

Attach Documents

The Documents page is for attaching any pertinent documentation associated with the client (i.e. word documents, spreadsheets, pictures, etc.).



Navigating the Encounter Documents Page

- Active Client is listed in the Status Bar at bottom of page
- All saved documents are displayed in the <u>Encounter Documents Grid</u>
- If the document is a photo, it will be displayed in the top section
- Information about the selected document appears in the left bottom section

Add a new Document file

1 Make sure correct Client is selected
2 Click NEW button
3 In popup window, navigate to desired document
4 Click OPEN
5 Select Consent Level
   a This determines who will be able to see the document
   b Each document may have a different consent level
6 Enter or select Description
7 Note Entered by fills in automatically with User ID
8 Enter Note
9 Click SAVE

Record will appear in DOCUMENTS GRID

Update a Document file

1 Make sure correct Client is selected
   a Use dropdown at top of page to select Customer; Head of Household is listed in Status Bar
2 Select file to update in the DOCUMENTS GRID
3 Click UPDATE button
4 Open dialog box will open, select new file
5 Click OPEN button

Delete a Document file

1 Make sure correct Client is selected
   a Use dropdown at top of page to select Customer; Head of Household is listed in Status Bar
2 Select record in DOCUMENTS GRID
3 Click DELETE

Record will disappear from DOCUMENTS GRID

Download a Document file to the local computer

1 Make sure correct Client is selected
   a Use dropdown at top of page to select Customer; Head of Household is listed in Status Bar
2 Select file to download in the DOCUMENTS GRID
3 Click DOWNLOAD button
4 Save As dialog box will open, select the location to save the file

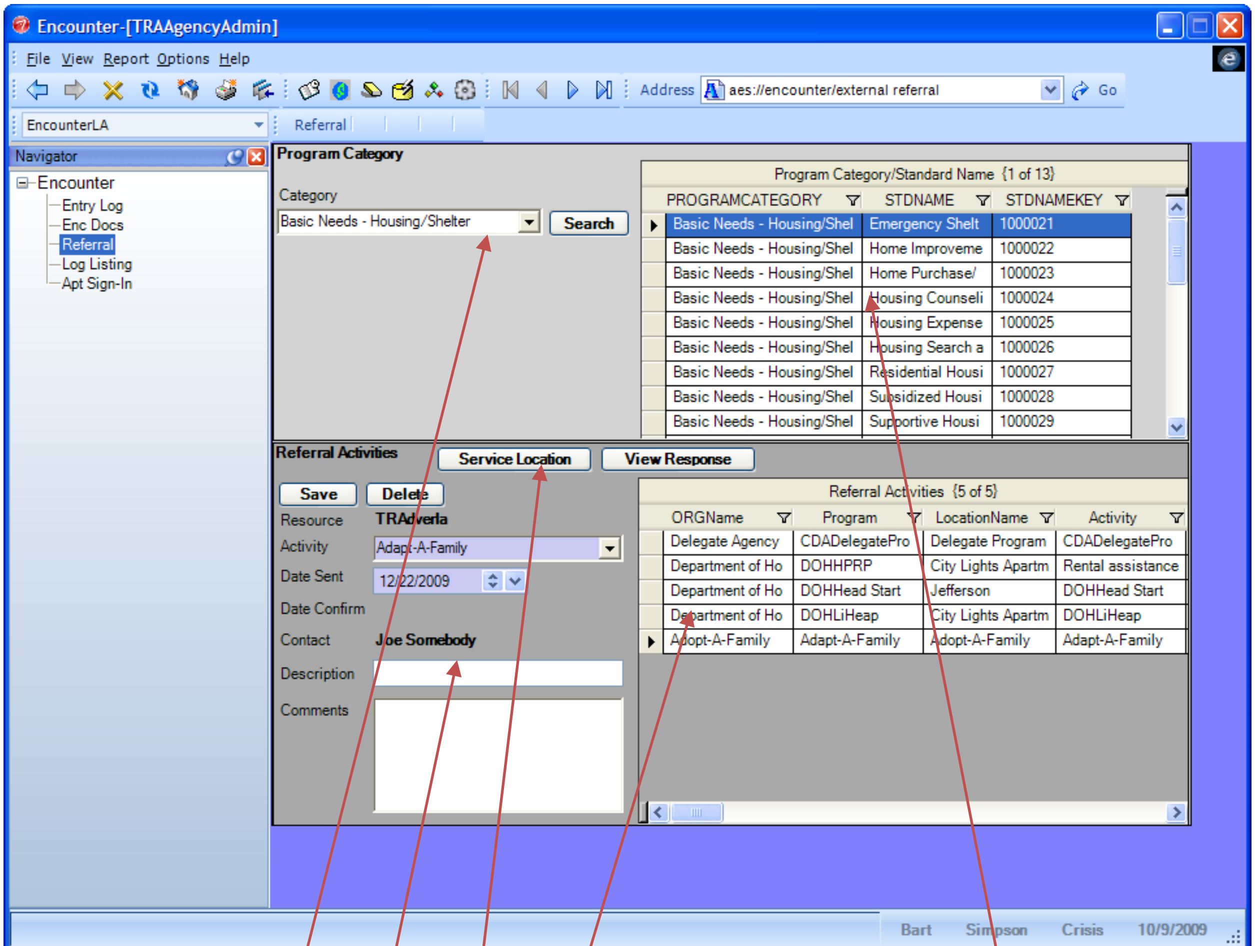
Open a Document file

1 Make sure correct Client is selected
   a Use dropdown at top of page to select Customer; Head of Household is listed in Status Bar
2 Select file to open in the DOCUMENTS GRID
3 Click OPEN button

File will open in program registered to that file type.

Create Referrals

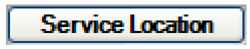
The Referral page is for referring Walk-In Clients to other Programs, both internally and externally. After the Referral has been completed, it may be confirmed and the response from the referral source may be viewed.



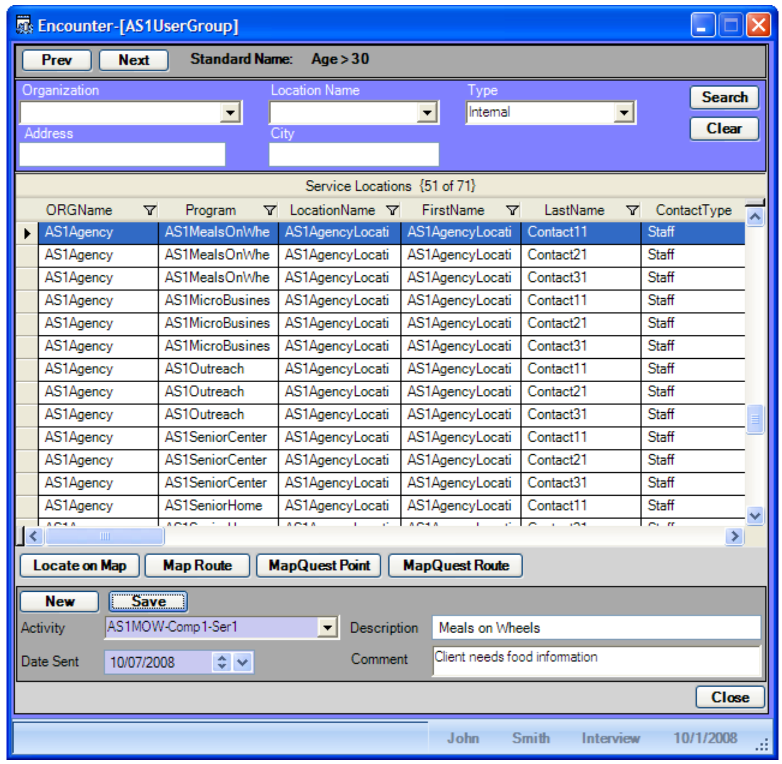
Navigating the Employment/Education Page

- Client is listed in Status Bar at bottom of page
- All available Program Categories will be listed in the Program Category dropdown
- All available selections for the selected Program Category will be displayed in the PROGRAM CATEGORY/STANDARD NAME GRID
- Referrals will be created in the Service Location popup window accessible with the Service Location button
- Referrals will be displayed in REFERRALS GRID the after being created
- Details about the selected Referral will appear in the lower left section

Create Referral

1 Make sure correct Client is selected
   a Go to Log Listing page to select Client if needed
2 In the top section, select Program Category
3 Click SEARCH button
   a A list of STD Names matching the category will appear in the PROGRAMS CATEGORY/STANDARD NAME GRID
4 Select the Category/STD Name combination in the PROGRAMS CATEGORY/STANDARD NAME GRID
5 Click SERVICE LOCATION button in bottom section 

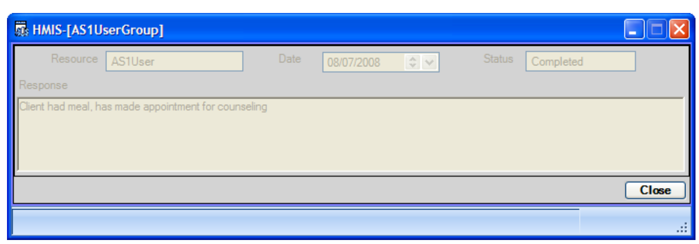
6 In the popup window:
   a All available Locations for this Referral are displayed in the SERVICE LOCATIONS GRID
   b Scroll through the Standard Names at the top with the PREV and NEXT buttons
7 Filter the list by selecting any of the parameters in the top blue section, then click SEARCH
   a Click CLEAR to clear all search fields and begin a new search
8 Map any location or route using Microsoft MapPoint or MapQuest in Internet browser:
   a Select the Location(s) to map
   b Click LOCATE ON MAP or MAPQUEST button to Map
   c Click MAP ROUTE or MAPQUEST ROUTE button to create route
9 Click NEW button
10 Select Activity
11 Enter Description
12 Select Date Sent
13 Enter Comment
14 Click SAVE button
15 Click CLOSE button when finished



Referral information will automatically populate onto Referral page

View Referral Response

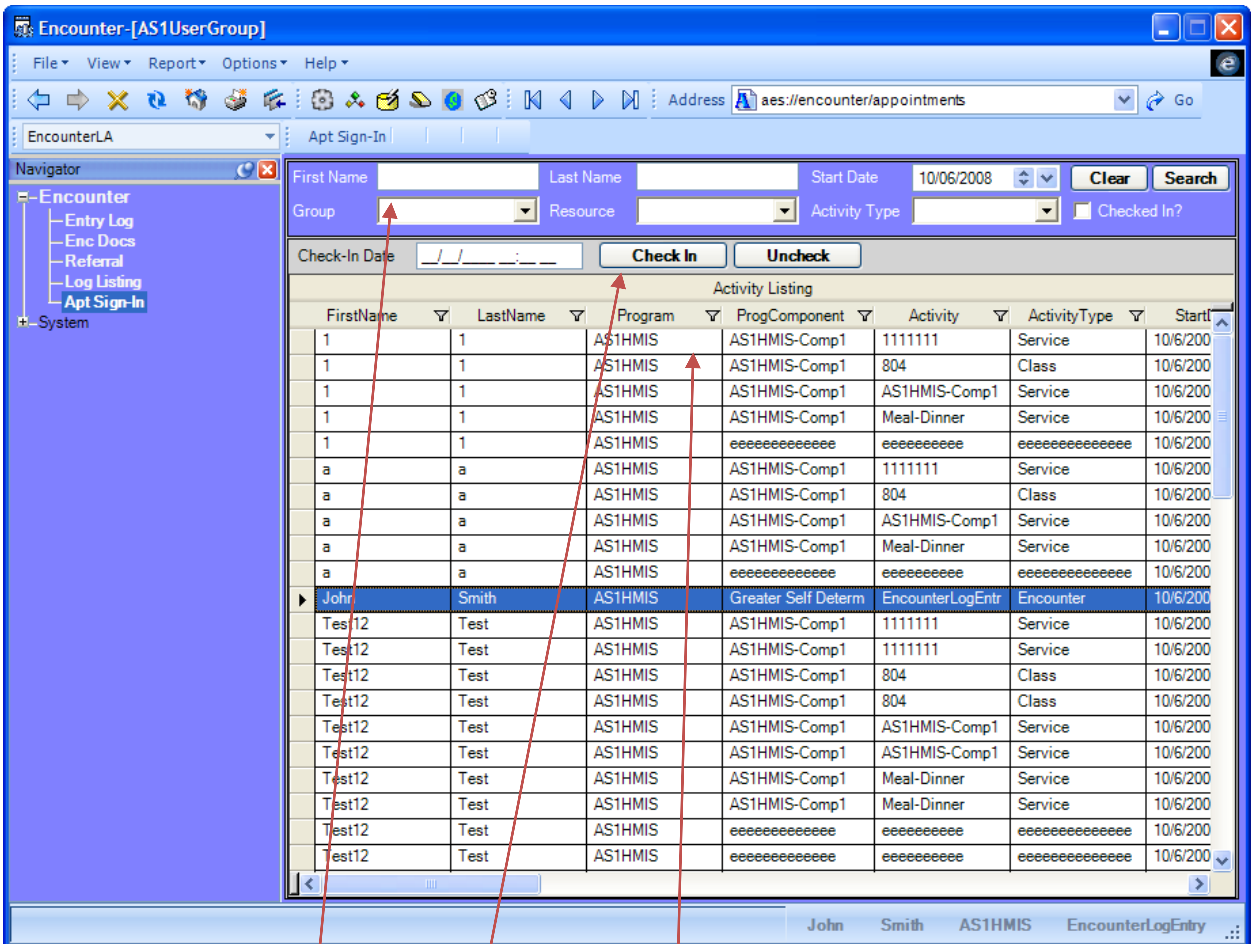
If Referral has taken place, the Date Confirmed will appear. The response may be viewed with the VIEW RESPONSE button. Note the response cannot be changed or edited, only viewed.



1 Make sure correct Referral is selected in REFERRALS GRID
2 Click VIEW RESPONSE button
3 Click CLOSE button when finished

Sign in Appointments

The Appointment Sign-In page is to check clients in for their appointments. It allows searches by a particular staff member or an entire group, or even by Activities of a specified type. This page is unlike the other pages in the Encounter Section because it is not driven by the Encounter Log Listing page.



Navigating the Appointment Sign in Page

- Search for Appointments in the upper blue section
- All matching Appointments will be displayed in the <u>ACTIVITY LISTING GRID</u>
- Check in Appointments with the Check In button

Find Appointment to check in

There are several ways to search for referrals, select the search criteria, and then click SEARCH:

1 Make sure the CHECKED IN? box is not checked
2 Select Start Date
3 Click SEARCH

All of today's appointments will appear in the ACTIVITY LISTING GRID.

Find all of a specific type of appointments for a specific date

1 In top section, select any combination of:
   - a Group
   - b Resource
   - c Activity Type
   - d Do not check CHECKED IN box
2 Select Start Date
   - a Date defaults to today's date, change if needed
3 Click SEARCH

ACTIVITY LISTING GRID will show all appointments that can be checked in

Find a specific Client

1 Enter First Name and/or Last Name
2 Click SEARCH

Clients matching that name will appear in ACTIVITY LISTING GRID

Check in Appointment(s)

1 After doing Search, select Appointment in ACTIVITY LISTING GRID
   - a To select more than one appointment, press and hold the CTRL key while selecting each row
2 Click CHECK IN button

The Appointments will disappear from the ACTIVITY LISTING GRID.

View all Check in Appointments

1 In top section, click to create checkmark in CHECKED IN checkbox
2 Select other parameters as necessary
3 Click SEARCH

ACTIVITY LISTING GRID will now show all Appointments that have been check in.

To "uncheck" an Appointment:

1 Select Appointment in ACTIVITY LISTING GRID to uncheck
2 Click the UNCHECK button

The Appointment will disappear from the ACTIVITY LISTING GRID.