



ARIES Basics

Logging in:

- Open your web browser and go to <https://160.42.237.58/aries/>
- When prompted, choose your login certificate
- At the login screen, enter your assigned login name and password
- Remember – you cannot login on any computer that you do not have a certificate on. If your job requires you to use other computers in addition to the ones you have been set up on, please notify BVCOG.

Entering a client as new:

All clients must be entered into ARIES; no information is being transferred from COMPIS. Do not enter clients who have not received services since January 1, 2005.

Part I: Searching

1. Before entering a client, you must have the following required information on hand:
 - a. First name
 - b. Last name
 - c. Mother's maiden name
 - d. Date of birth

If MMN IS NOT KNOWN: Do **not** enter anything in ARIES besides the client's last name in the MMN field. **Do not enter "unknown," "na," or any other variations.**

2. Clients must be searched for before being entered as new. This prevents duplicate entries. At the top of the screen, click on 'New' and 'Client' – this takes you to a search screen. Enter the client's full search information and hit search.
3. If a client match is not found, click 'create new client' – this takes you to a second search screen. Enter information in all of the boxes (required fields are marked by a large red star) and click the search button.
4. If a match is not found, the system then requires you to tab through each field before creating the new client. Place your cursor in the first field and tab through the fields **while double-checking each entry for accuracy.**
5. After tabbing, the 'search' button changes to 'create.' Click the 'create' button to create the new client. Leave the share box **unchecked** until the client indicates on the consent form that they are willing to share their information.

Part II: Entering Client Information

1. Enter as much information as you can on each of the client screens. Required fields are marked with a large red star.
2. Contact Info screen notes:
 - a. Phone information: 'Allow calls' indicates whether the client permits the agency to call them at this number; 'Confid' indicates whether agency personnel should reveal where they are calling from.
3. Demographics screen notes:
 - a. Ethnicity and at least one race are required;
 - b. If the client is Hispanic, enter their national origin if known;
4. Agency Specifics screen:
 - a. Enter the agency's client ID(s) on this screen;
 - b. 'Referral Source' is how the client was first referred to the agency for HIV services.
5. Eligibility Documents screen:
 - a. **If you do not have complete information for an entry, check the Pending box.** The entry cannot be edited if the entry is saved without this box being checked.

Part III: Assigning staff

1. After going through the initial client entry screens, click on the gray 'Programs' tab and then the yellow 'Program Summary' tab
2. Click 'edit' on Staff Assignment
3. Use the drop down box to enter the client's staff assignment – their primary case manager should be in the first box, with any other agency staff working with them in the subsequent boxes.
4. If the client sees staff at other agencies and you wish to enter these staff, put their information in the blank staff fields.

Entering service deliveries

1. Click on the gray 'Services' tab and 'new' to enter a new service delivery
2. Service delivery can be entered with the client's name or agency id
3. All services must be assigned to a contract ID
4. If this is a regularly provided/scheduled service, enter the number of days to the next service delivery
5. Click 'save & done' to return to the Services screen or 'save & next' to enter another service delivery

Care Plan, Referrals, & Needs Assessment

1. Care plan, referrals, & needs assessment information is entered by clicking on the gray 'Care Plan' tab
2. Choose the yellow tab corresponding to your entry
3. Needs Assessment:
 - a. Click 'new' to enter a new needs assessment
 - b. Check 'need' or 'don't need' for each area you asked the client about
 - c. Checking 'create care plan' for a need will result in you being automatically prompted for a care plan
4. Care Plan:
 - a. Click 'new' to enter a new care plan
 - b. Enter the need information and hit 'save'
 - c. Task, referral, and services information will appear – click 'new' on any of these to enter information
 - d. Tasks may be assigned to the client
 - e. **Note:** 'PSC' in Interventions is 'payment source code' – you do not need to enter anything in this field unless instructed by your specific agency, BVCOG, or DSHS.
5. Referrals:
 - a. Click 'new' to enter a new referral
 - b. Once an outcome is set, the referral cannot be edited again

Entering case notes:

1. Click on the gray 'Case Notes' tab and click 'new' to enter a new case note for the client
2. Choose the staff who conducted the meeting (usually the case manager)
3. Enter the activity date (date of the meeting)
4. In 'Type,' enter the general type of meeting the note is for (assessment, update, conference, etc.)
5. You cannot type in the text box below 'Type' – case notes entered in the 'New Paragraph' box will appear here
6. Choose the category for the note you are entering
7. Case notes are entered in sections – type the case note for that particular section in 'New Paragraph.' Once you are done typing that section, choose another category or hit 'save' to save and exit. The note you typed will automatically appear in the text field below 'Type.'
8. Once you are finished entering all of the notes for that meeting, hit 'save' to exit.
9. If a case note is not signed and sealed, it cannot be viewed by anyone outside of the agency. It can still be viewed within the agency without being sealed.

Entering appointments:

1. To enter a new appointment, click on 'New' at the top of the screen and 'Appointment.'
2. The person you are meeting with does not have to be a client of the agency – they can be a potential client, colleague, etc.
3. After the appointment time, go back to enter an outcome for the appointment and any notes.