

Appendix A

HIV/STD policy 240.000 Documenting Case Management Actions in ARIES

ARIES AIDS Regional Information and Evaluation System (ARIES) is a browser-based, client level software used by Ryan White funded providers to report all Ryan White eligible services for all Ryan White eligible clients.

Type This is a selection in ARIES that must be chosen after the user determines that a case note needs to be written. It encompasses the general nature of the case note and the user has one of four choices they may make in assessing the type of note: case conference, crisis note, progress note or a reassessment. The following are available selections of “types” in ARIES:

Assessment/Reassessment

This is a **type** of case note that should be done at initial intake or at a set or standardized time for client reassessment. Information would include but is not limited to initial or updated information about the client’s medical status, social situation, legal, financial and or housing issues.

Case Conference

This is a **type** of case note that includes information discussed in a group setting between professionals. Professionals could include (but not limited to) case managers, supervisors, MD, NP or a mental health or substance abuse counselor. Information about the client discussed could include ongoing issues and a plan on how to address them.

Crisis Note

This is a **type** of case note that should be used in lieu of a progress note when the client came in with an urgent need that had significant implications for their care and/or well being.

Progress Note

This **type** of case note contains updates to a client situation including routine case management visit or an impromptu visit/phone call the client made to the agency requesting additional assistance or information. Any case note that does not fit into the above categories should be a progress note.

Category This is a selection in ARIES that is chosen after a type of case note is determined. The selection of category further delineates the exact nature of the contact with the client and what issue was addressed.

Adherence

This is a **category** of case note encompassing counseling related to medications. Documentation should include issues regarding taking medications, barriers encountered and the plan for the client to overcome

these barriers. This could be counseling provided by the case manager or information regarding discussions with the client's health provider about medication issues.

Administration

This is a **category** of case note intended to capture information not appropriately categorized elsewhere. This can include phone calls made, faxes received (services that do not necessitate units of service but the Case Manager would like to document the occurrence). Units of service provided that did not necessitate a case note but did require a unit of service to be documented in ARIES can also be documented here such as giving a food or transportation voucher.

Education

This is a **category** of case note that includes information given to the client, such as education about services the agency offers or information about literacy programs. Also included in this category is information about clients who are in school or taking classes to further their education. Health education provided to clients is not included here because it has a separate category.

Employment

This is a **category** of case note that includes information about a client's current work status, referrals to job training or barriers the client is encountering related to his/her work status.

Family/ Social Support

This is a **category** of case note that would include family issues brought to the attention of the case manager as well as assistance given to affected family members.

Financial

This is a **category** of case note that includes new or updated information about the client's household income, financial need, currently approved or pending benefits (e.g., Medicaid, Food Stamps, AIDS Drug Assistance Program application submission), plans for improving the client's financial situation, and actions taken by the client and case manager to meet financial goals.

Health education

This is a **category** of case note regarding education about HIV and other diseases, disease management, referrals to other programs for health education, reference to any printed literature given, and other related health topics, such as smoking cessation, weight management, nutrition, and hygiene. If printed literature is given, it should be reviewed with the client to ensure they understand the information.

Housing

This is a **category** of case note regarding a client's current living situation, including Housing Opportunities for People living With AIDS

(HOPWA). Case notes regarding HOWPA enrollment/ usage should have corresponding documentation in the HOPWA module.

Legal

This **category** of case notes includes information about any current legal issues the client has or needs assistance with, as well as updates to current situations, including incarceration.

Medical

This **category** of case notes includes information that DIRECTLY relates to a client's medical well being and/or current medical or dental care.

Mental Health (MH)

This **category** of case notes includes results of the SAMISS scale or other validated screening tool with discussion of referrals made to and accepted/rejected by the client. It should also include any MH issues the client is dealing with, including: inability to keep appointments; progress in treatment; ongoing work with clients who are referred to MH services but refuse treatment; clients who are on a wait list for treatment; and behavior at CM sessions possibly related to MH issues that are inhibiting progress toward care plan goals.

Risk Reduction

This **category** of case note includes ongoing discussion with the client about current sex partners or any other risk behavior. This includes referrals to prevention programs, partner services and STDs screening and treatment programs. Working with a client on reducing substance use risk should be categorized in the SA category.

Substance abuse (SA)

This **category** of case notes includes results of the SAMISS scale or other validated screening tool with discussion of referrals made to and accepted/rejected by client. It should also include any SA issues the client is dealing with, including: inability to keep appointments; progress in treatment; ongoing work with clients who are referred to SA services but refuse treatment; clients who are on a wait list for treatment; current substance use patterns noted or observed; and behavior at CM sessions possibly related to SA issues that are inhibiting progress toward care plan goals.