Client Level Services Module

Demographics Sub Module

Add a New Client

1. Click **Client Level Services** on the module menu bar. The *Select Client* screen displays.
2. Click **Demographics** on the sub module menu bar. The *Select Client* screen displays.
3. Type the client's first name, last name or unique key into the appropriate fields.
4. Click **Search.** The *Client Search Results* displays at the bottom of the screen.
5. Click **Add New Client.** The A*dd New Client* screen displays.
6. In the **Date Collected** field, type the date the individual became a client at the agency.
7. In the **Local Client ID** field, type a unique client ID that your agency generates, or click the **Check to use PEMS Client ID** checkbox .

Note: *The Local Client ID accepts a maximum of 12 alpha/numeric characters, no dashes or underscores*

8. In the **Birth Date – Year** field, type the birth year of the client.
9. Click the **Ethnicity** drop-down list, and then select the ethnicity of the client.
10. Click the appropriate **Race** check-boxes.

    Click the **State/Territory of Residence** drop-down list, and then select the client's state of residence.
11. Click the **Assigned Sex at Birth** drop- down list, and then choose the appropriate selection for the client.
12. Click the **Current Gender** drop-down list, and then choose the appropriate selection for the client.
13. Add in any additional information you have for the client in the other fields
14. Click **SAVE AND FINISH**.

Risk Profile Sub Module

Add a Risk Profile for a Client

1. Click **Client Level Services** on the module menu bar. The *Select Client* screen displays.
2. Click **Risk Profile** on the sub module menu bar. The *Select Client* screen displays
3. Search for the client record that you want to add risk profile information to.
4. Click **Choose Client**. The ***Maintain** Client Risk Record* displays.
5. Click **Add updated risk profile**. The *Add Updated Risk Profile* screen displays.

Note: *The **Most Recent Risk Profile** displays at the top of the page. Scroll down to **Current Risk Profile**.*

6. In the **Date Collected** field, type the date the risk profile information was collected.

6. Click the **Self Reported HIV Status** drop-down list, and then choose the applicable selection.
7. Click the **Previous HIV Test** drop-down list, and then select the choose the applicable selection for the client.

Note: *Another option is to click **Check to Use Most Recent Risk Profile and update as of this session date** checkbox and update the appropriate information.*

9. Click **SAVE AND FINISH**.

INTERVENTIONS SUB MODULE

Add an Intervention Session for a Client

1. Click **Client Level Services** on the module menu bar. The *Select Client* screen displays
2. Click **Interventions** on the sub module menu bar. The *Select Client* screen displays.
3. Search for the client record that you want to add intervention session information to.
4. Click **Choose Client**. The *Maintain Intervention Sessions* screen displays.
5. Under **Intervention Session** section, click **Add New Session**. The *Add Intervention Session* screen displays.
6. Click the **Year** drop-down list, and then select the year the program was set up.
7. Click the **Program Name** drop-down list, and then select the name of the program the intervention is associated with.
8. Click the **Program Model Name** drop-down list, and then select the program model that the intervention is associated with.
9. Click the **Intervention name** drop-down list, and then select the name of the intervention the client received services from.
10. In the **Session Date** field, type the date of the session the client received services.

Note: *If you want to add recruitment details, risk profile, behavior details or local variables, check those appropriate checkboxes.*

11. Click **Save and continue.** The *Add Session Details* screen displays.
12. Click to highlight the workers that Delivered the services, and then click **ADD TO LIST**.
13. Click the **Site** drop-down list, and then select the site where services were delivered.
14. In the **Duration of session** field, type the duration of the session in minutes.
15. Click the **Unit of delivery** drop-down list, and then select individual or group.
16. Click all of the **Delivery methods** based on the program plan, and then click **ADD TO LIST**.
17. Click any **Delivery Methods not included in Program Plan**, if applicable, and click **ADD TO LIST.**

5. Complete the **Session** field.
6. Click **SAVE AND CONTINUE**. The *Add Session Template Details* screen displays indicating the session template was added successfully.
7. Under the **Worker(s)** section, click the worker's name,
8. Click **ADD TO LIST**.
9. Click the **Site** drop-down list, and then select the site where the intervention will be delivered.
10. Under the **Delivery Method(s)** section, click the appropriate method.
11. Click **ADD TO LIST**.
12. Under the **Activity(s)**, click the appropriate activities.
13. Click **SAVE AND FINISH**. The new session template displays in the **Session Template(s)** section at the bottom of the screen.

Using a Session Template

Session templates can be used when adding new client sessions.

1. Click **Client Level Services** on the module menu bar. The *Search Client* screen displays.
2. Complete the client search criteria.
3. Click **SEARCH**.
4. Click the radio button next to the desired client's name.
5. Click **CHOOSE CLIENT**. The *Maintain Intervention Sessions* screen displays.
6. Click **Add New Session**. *The Add Intervention Session* screen displays.
7. Click the **Session Template** drop-down list, and then select the appropriate template.

Note: *The template list is populated with the names of all session templates created by your agency.*

The **Year**, **Program**, **Program Model Intervention**, and **Session** fields auto-populate based on the session selected.

8. Complete the **Cycle** field, if applicable.

Note: *The **Cycle** field will display depending upon the intervention selected.*

9. Click **SAVE AND CONTINUE**. The *Add Session Details* screen displays indicating the session was saved.
10. Review the session details and make any edits, if necessary.
11. Click **SAVE AND FINISH**. The *Session Detail* screen displays.
12. Complete the appropriate fields.

Note: *The Activity(s) and Delivery Method sections pre-populate from the template.*

13. Click **SAVE AND FINISH**. The *Maintain Existing Session* screen displays.
14. Scroll to the bottom of the screen, and then click **BACK TO MAINTAIN.**

12. Under the **Partner(s)** section, Click **Add New Partner**. The *Add Partner* screen displays
13. At minimum, complete the mandatory fields.
14. Click **SAVE AND FINISH**. The *Maintain Existing Case* screen displays indicating the partner as been added.
15. Under the **Partner Details** column, click **Maintain**. The *Maintain Partner Details* screen displays.
16. Under the **Attempts to Locate** section, click **Add New Attempt**. The *Add New Attempt to Locate* screen displays.
17. Complete the **Attempt Date**, **Attempt Outcome** and **Enrollment Status**.
18. Click **SAVE AND FINISH**. The *Maintain Partner Details* screen displays indicating the Attempt to Locate has been added to the PCRS case.
19. Scroll down the screen to the **Session(s)** section.
20. Click **Add New Session**. The *Add Session Details (for Partner)* screen displays.
21. Complete at minimum the mandatory fields.
22. Click **SAVE AND FINISH**. The *Maintain Partner Details* screen displays.
23. Under the **Session Details** column, click **Maintain**. The *Maintain Existing Session* screen displays.
24. Click **Add** for **Partner Risk Profile**. The *Add Partner Risk Profile* screen displays.
25. At minimum, complete the mandatory fields.
26. Complete the **Client Risk Factor** section.
27. Complete the **Sex Relations** section.
28. Click **SAVE AND FINISH**.

SESSION TEMPLATES SUB MODULE

Adding a Session Template

A Session template collects all the data that a user would enter in the *Add New Session* and *Add Session Details* screen and can be used in two ways:

- During the planning of an intervention
- After a session is delivered

1. Click **Client Level Services** on the module bar. The *Select Client* screen displays.
2. Click **Session Templates** on the sub module menu bar. The *Maintain Session Templates* screen displays.
3. In the **Session Templates(s)** section, click **Add New Session Template**. The *Add Session Template* screen displays.
4. In the **Session Template** Name field, type a unique name.

Note: *The system will prevent the creation of duplicate session templates (same name).*

4. Select the desired **Year**, **Program Name**, **Program Model Name** and **Intervention Name**.

PEMS Client Level Services Module

18. Click all **Activities included in program plan** that were delivered during the session and click **ADD TO LIST.**
19. Click all **Activities not included in program plan** that were delivered during the session (if applicable) and click **ADD TO LIST**
20. Click **SAVE AND FINISH**. The *Maintain Existing Session* screen displays.

Add a Counseling and Testing Intervention

1. Follow steps 1-6 from **Add an Intervention Session for a Client**.
2. Click the **Program Name** drop-down list, and then select the name of the Counseling and Testing program the intervention is associated with.
3. Click the **Program Model Name** drop-down list, and then select the Counseling and Testing program model that the intervention is associated with.
4. Click the **Intervention name** drop-down list, and then select the name of the Counseling and Testing intervention the client received services from.
5. In the **Session Date** field, type the session delivery date.
6. Click the applicable checkboxes for recruitment details, risk profile, behavior details or local variables.
7. Click **SAVE AND CONTINUE**. The *Add Session Details* displays.
8. Select the workers that delivered the services, and then click **ADD TO LIST**.
9. Click all **Activities included in program plan** that were delivered during the session, and then click **ADD TO LIST. Note:** This should include **HIV Testing.**
10. Click all **Activities not included in program plan** that were delivered during the session, if applicable, and then click **ADD TO LIST.**
11. Click **SAVE AND FINISH**. The *Maintain Existing Session* screen displays.
12. Scroll to the **Activity(s)** section.
13. Under **HIV Test Activity**, click **Add New Test**. The *Add HIV Test Details* screen displays.
14. In the **Test Sequence Number** field type the test sequence number for that client.
15. Click the **Test Technology** drop-down list, and then select **Conventional, Rapid,** or **Other.**
16. Click **Yes** or **No** to indicate whether the test is **Anonymous**.
17. In the **Sample Collection Date** field, type the date the test sample was taken.
18. Click the **Type of Specimen** drop down list and select how the test was administered.
19. Click **SAVE AND FINISH**.

REFERRAL SUB MODULE

Add a Referral for a Client

1. Follow steps 1-12 from **Add an Intervention Session for a Client**.

2. Click all of the **Delivery methods** that were used based on the program plan, and then click **ADD TO LIST**.
3. Under **Activities**, click **Referral**, and then click **ADD TO LIST.**
4. Click **Save and Finish**. The *Maintain Existing Session* screen displays.
5. Scroll down to the **Activities** section.
6. Under **Referrals Activity**, click **Add New Referral**. The *Add Referral* screen displays.

   The referral date is auto-populated from the activity date.

7. In the **Referral Code** field, type the unique referral code generated via the **Reports** module.
8. Click the **Referral Service Type** drop-down list, and then select the type of service the client will receive.
9. If the client is being referred internally within your agency, under **Internal Agency Site Name,** click the internal agency site name, and then click **ADD TO LIST.**
10. If the client is being referred externally to a network agency, under **Network Agency Site Name**, click the network agency name, and then click **ADD TO LIST.**
11. Click **SAVE AND FINISH**.

Add a Referral Follow-Up for a Client

1. Follow steps 1-4 from **Add an Intervention Session for a Client**.
2. Search for the referral client record by referral code, referring network agency, type of service, or date range of the referral. The referrals display at the bottom of the screen.
3. Click **Edit** for the desired referral. The *Edit Referral Details* screen displays.
4. Scroll down to the **Referral Follow-Up** section.
5. In the **Referral Close Date** field, type the date the referral was closed.
6. If they client did not access services, click all of the reasons why the client did not access the service, and then click **ADD TO LIST**
7. Click **SAVE AND FINISH**.

HIV STATUS SUB MODULE

Add HIV Status

1. Click **Client Level Services** on the module menu bar. The *Select Client* screen displays
2. Click **HIV Status** on the sub module menu bar. The *Select Client* screen displays.
3. Search for the client record that you want to add HIV status information to.
4. Click **Choose Client**. The *Maintain Confirmed HIV Status* screen displays.
5. Click **Add Confirmed HIV Status.**
6. In the **Date collected** field, type the date that the information was collected from the client.

Add Session Details for a Partner when the Index Client is Unknown

1. Follow steps 1-2 from **Open PCRS Case when the Index Client is Known**.
2. Search by open cases**.**
3. Click **SEARCH**. The *Select Case* screen displays.
4. Click the radio button next to the applicable case, and then click **CHOOSE CASE.** The *Maintain Existing Case* displays.
5. Under the **Partner Details** section, click **Maintain** for the applicable PCRS Case. The *Maintain Partner Details* displays.
6. Under **Attempt(s) to** Locate, click **Add New Attempt** to enter attempts to locate the partner. The *Add New Attempt to Locate* displays.
7. In the **Attempt Date** field, type the date the attempt was made to locate the client.
8. Click the **Attempt Outcome** drop-down list, and then select **Locate**.
9. Click the **Enrollment status** drop-down list, and then select **Accept** or **Refused**.
10. Click **SAVE AND FINISH**. The *Maintain Partner Details* displays.
11. Under **Session(s)**, click **Add New Session** to add session information for the partner. The *Add Session Details (for Partner)* displays.
12. In the **Session Date** field, type the date of the session held with the partner.
13. Click all the **Worker(s)** that delivered PCRS services, and then click **ADD TO LIST**.
14. Click the **Site** drop-down list, and then select the site where the session was delivered.
15. In the **Duration of session** field, and type the total number of minutes for the length of the session.
16. Click **SAVE AND FINISH**.

Adding Partner Risk Factors for PCRS

1. Click **Client Level Services** on the module menu bar. The *Select Client* screen displays
2. Click **PCRS Case** on the sub module menu bar. The *Select Client* screen displays
3. Click the **Case** radio button. The screen refreshes and the *Select Case* screen redisplays.
4. In the **Search Case** section, type the desired search criteria.
5. Click **SEARCH**.
6. If no records found continue with the step 7 .
7. Click **Add New PCRS** Case. The *Add PCRS Case* screen displays.
8. In the **Open Case** section, select the desired **Year**, **Program Name**, **Program Model Name** and **Intervention Name**.
9. Complete the **Case Number** field.
10. Complete the **Case Open Date** field.
11. Click **SAVE AND FINISH**. The *Maintain Existing Case* screen displays indicating the PCRS case has been added successfully.

elicitation was done at a venue, enter the date of the week, time of day and venue type.

30. Click **Save and Add Partner Details** The *Add Partner* screen displays.
31. Click the **Notification Plan** drop-down list, and then choose the applicable selection.
32. Click the **Spouse** radio button, if applicable
33. Click the **Partner Type** drop-down list, and then choose the applicable selection.
34. Under **Partner Details** section, click **Date Collected**, and then type the date that the Partner information was collected.
35. Click the **State/Territory of Residence** drop-down list, and then select the state the partner resides in.
36. Click **SAVE AND FINISH**.

Open a PCRS Case and Add Partner Information When the Index Client is Unknown

1. Follow steps 1-2 from **Open PCRS Case when the Index Client is Known**.
2. Search by open cases**.**
3. Click **SEARCH**. The *Select Case* screen displays.
4. Under the **Case(s) – Search Results** section, click **Add New PCRS Case**. The *Add PCRS Case* screen displays.
5. Click the **Year** drop-down list, and then select the appropriate year.
6. Click the **Program Name** drop-down list, and then select the appropriate program name.
7. Click the **Program Model Name** drop- down list, and then select the appropriate program model name.
8. Click the **Intervention Name** drop-down list, and then select the appropriate intervention name.
9. In the **Case Number** field, type a unique PCRS Case key for your agency, or click the checkbox for **Default to System Generated PCRS Case Number**. The *Maintain Existing Case* screen displays.
10. In the **Case Open Date** field, type the date that the PCRS Case was opened.
11. Click **SAVE AND FINISH**. The *Maintain Existing Case* screen displays.
12. Click **Add New Partner**. The *Add Partner* screen displays.
13. Click the **Notification Plan** drop-down
14. Click the **Spouse** radio button, if applicable
15. Click the **Partner Type** drop-down list, and then choose the applicable selection.
16. Under **Partner Details** section, click **Date Collected**, and then type the date that the Partner information was collected.
17. Click the **State/Territory of Residence** drop-down list, and then select the state the partner resides in.
18. Click **SAVE AND FINISH**.

7. Click the **Confirmed HIV Test result** drop-down list, and then choose the appropriate option for your client.
8. In the **HIV Test Date** field, type the date the HIV test date was administered.
9. Click the **Confirmed Documentation Source** drop-down list, and then select the source that provided the confirmed test results.
10. In the **Confirmation Date** field, type the date that the confirmed test results were reached.
11. Click **SAVE AND FINISH**.

LOCATING INFO SUB MODULE

Add Attempts to Locate

1. Click **Client Level Services** on the module menu bar. The *Select Client* screen displays.
2. Click **Attempts to Locate** on the sub module menu bar. The *Select Client* screen displays.
3. Search for the client record that you want to add HIV status information to.
4. Click **Choose Client**. The *Maintain Confirmed HIV Status* screen displays.
5. Click **Add new Attempt to Locate**.
6. Click the **Year** drop-down list, and then select the year the program information that you are attempting to locate the client under.
7. Click the **Program Name** drop-down list, and then select the
8. name of the program that you are attempting to locate under.
9. Click the **Program Model name** drop-down list, and then select the name of the program model that you are attempting to locate under.
10. Click the **Intervention name** drop-down list, and then select the name of the intervention that you are attempting to locate under.
11. In the **Attempt date** field, type the date that you attempted to locate the client.
12. Click the **Attempt outcome** drop-down list, and then select the appropriate outcome for attempting to locate the client.
13. Click **SAVE AND FINISH**.

PCRS CASE SUB MODULE

Open a PCRS Case when the Index Client is Known

1. Click **Client Level Services** on the module menu bar. The *Select Client* screen displays.
2. Click **PCRS Case** on the sub module menu bar. The *Select Client* screen displays.
3. Search for client's name.

4a. If the client is not already in the system click **Add new client**. *Add New Client* displays. Continue with step 5.

4b. If the client is in the system, click the client name radio button and click **choose client** for the appropriate client and move to step 15.

5. Click in the **Date Collected** field, and then type the date information was collected.
6. Click in the **Local Client Unique Key** field, and then type a unique client key that your agency generates or click the **Check to use PEMS Client Unique Key** checkbox .
7. Click in the **Birth Date – Year** field, and then type the client's year of birth
8. Click the **Ethnicity** drop-down list, and then select the client's ethnicity.
9. Click the appropriate **Race** checkboxes.
10. Click the **State/Territory of Residence** drop-down list, and then select the state where the client resides.
11. Click **Assigned Sex at Birth** drop-down list, and then select the appropriate gender for the client.
12. Click the **Current Gender** drop-down list, and then choose the appropriate selection for the client.
13. Complete any additional fields, if necessary.
14. Click **SAVE AND FINISH**.
15. Click **PCRS Case** on the sub module menu bar. The *Select Client* screen displays.
16. Click **Add New PCRS Case**. The *Add PCRS Case* screen displays.
17. Click the **Year** drop-down list, and then select the appropriate year.
18. Click the **Program Name** drop-down list, and then select the appropriate program name.
19. Click the **Program Model Name** drop- down list, and then select the appropriate program model name.
20. Click the **Intervention Name** drop-down list, and then select the appropriate intervention name.
21. In the **Case Number** field, type a unique PCRS Case key for your agency, or click the checkbox for **Default to System Generated PCRS Case Number**. The *Maintain Existing Case* screen displays.

Note: *The Maintain Existing Case screen allows you to add attempt to locate, and add partner information.*

Add a PCRS Intervention Session and Elicit Partners

1. Follow steps 1-2 from **Open PCRS Case when the Index Client is Known**.
2. Search for client's name or case number.
3. Click the radio button for appropriate client, and then click **Choose Client**. The *Maintain PCRS Cases* screen displays.
4. Click **Maintain** for the applicable PCRS Case number you wish to add intervention session and partner detail information to. The *Maintain Existing Case* screen displays
5. Under the **Attempt(s) to Locate** section, click **Add New Attempt**. The *Add New Attempt to Locate* screen displays.
6. In the **Attempt Date** field, type the date the attempt was made to locate the client.

7. Click the **Attempt Outcome** drop-down list, and then select **Locate**.
8. Click the **Enrollment Status** drop-down list and then, select **Accept**.
9. Click **SAVE AND FINISH**.
10. Click **Interventions** on the sub module menu bar. The *Maintain Intervention Sessions* displays.
11. Scroll down to the **Intervention Session(s)** section, and then click **Add New Session**. The *Add Intervention Session* screen displays.
12. Click the **Year** drop-down list, and then select the appropriate year.
13. Click the **Program Name** drop-down list, and then select the appropriate program name.

Note: *This should be a program that is set up to deliver Partner Counseling and Referral Services, which in turn will populate the Program Model Name and Intervention Name drop-down lists.*

14. Click the **Program Model Name** drop- down list, and then select the appropriate program model name.
15. Click the **Intervention Name** drop-down list, and then select the appropriate intervention name.
16. Click the **PCRS Case Number** drop-down list, and then select the PCRS Case number opened for the client.
17. In the **Session Date** field, type the date of the session the client received services.
18. Click the **Recruitment Details**, **Risk Profile**, **Behavior Details** or **Local Variables**, checkboxes, if applicable.
19. Click **SAVE AND CONTINUE**. The *Add Session Details* displays.
20. Click all the **Worker(s)** that delivered PCRS services, and then click **ADD TO LIST**.
21. Click all the **Delivery methods** that were used based on the program plan, and then click **ADD TO LIST**.
22. Click any **Delivery Methods not included in Program Plan** that were used, and then click **ADD TO LIST**.
23. Click all the **Activities included in program plan** (including **Elicit Partners)** that were delivered during the session, and then click **ADD TO LIST**.
24. Click any **Activities not included in program plan** that were delivered during the session, and then click **ADD TO LIST**.
25. Include additional information for the PCRS Intervention session (site, duration, unit of delivery, etc.)
26. Click **SAVE AND FINISH**. The *Maintain Existing Session* displays.

Note: *The Maintain Existing Session screen allows you edit any of the information that you entered.*

27. In the **Activity(s)** section, click **Add New Elicit Partner** under **Elicit Partners Activity.** The *Add Elicit Partner Details screen* displays.
28. Click the **Partner Information Provided** drop-down list, and the choose the applicable selection.
29. Fill in any information that you have for the total number of partners (including anonymous), number of social network contacts, if the