



<b>Riverside/San Bernardino, CA TGA</b> <b>Policy and Procedure</b> <b>ARIES Policy # 6</b>	By..... Bonnie Flippin, MBA, Staff Analyst II
	Effective.....December 5, 2006
	Revised.....March 2, 2011
	APPROVED <i>Scott Rigsby</i>
Scott Rigsby, Public Health Program Coordinator	

**Subject – Case Notes**

- PURPOSE** To establish guidelines for the entry and maintenance of case notes in ARIES.
- POLICY** Sufficient case notes must be maintained for all clients receiving Ryan White Part A services. Once entered into ARIES, case notes cannot be deleted or altered in any way.
- SCOPE** This Procedure applies to all contractors (providers) serving eligible clients under the Ryan White Program within the Riverside/San Bernardino, CA TGA.
- PROCEDURE**
1. Whenever possible, case notes and service delivery data are to be entered into ARIES at the point of service (POS), in real time.
  2. Provider staff members are to complete their “charting” (entry) of case notes and service delivery data as soon as possible after services are delivered. In cases where there is a delay in data entry, providers are to ensure that case notes and all other required data are entered in a timely manner (see ARIES Policy #3 concerning timely data entry).
  3. Case notes must be “signed and sealed” by the end of each business day.
  4. A canned report is available in ARIES that can facilitate determining if any notes are still unsigned at the end of the day. In ARIES Client, click on REPORTS tab, choose MANAGEMENT REPORTS, and then choose UNSIGNED CASE NOTES. At the “Staff Last Name” prompt, click the arrow drop-down and choose “Equals”. In the next field type in the last name of the staff member for which you want to run a report. Click on “Report”, and it will print to the screen a table showing all of the unsigned case notes for that staff member. To run a report for ALL staff members, leave the fields blank and click on “Report”.

5. Once a case note has been entered into ARIES, the case note must not be deleted or altered in any way. As stated in the Inland Empire HIV Planning Council Case Management Standards, "No forms shall be destroyed or removed from the records once entered into them." As with paper charting, if a mistake is discovered, an additional note must be entered that states the correction.
6. Ryan White Program staff will conduct periodic Quality Assurance checks in ARIES with respect to this Policy.
7. Ryan White-funded providers found to be in violation of this P&P will be contacted and required to submit a plan to correct any deficiencies.
8. Ryan White Program staff will visit provider sites as necessary to ensure compliance with this P&P.