

Instructions for Commonly Used Functions in DAARS

www.azdaars.getcare.com

Adding a New Client in DAARS

1. Highlight "Caretool" and click on "Full Client Search"
2. Search for client in "Full Client Search"
3. If client is not found Click "Add New Record" (bottom right hand side of page)
4. Complete gender, birth date, last 4 of the SSN, address, phone, and email address if provided
5. Click "Save"
6. Write DAARS ID # on the assessment form
7. Region is always "Inter Tribal Council of AZ, Inc."
8. Subcontractor is your tribal community
9. Click "Save"
10. Click triangle to open "Demographics" section
11. Fill out demographics questions as they were answered on the intake form
 - a. If client is on the reservation it is considered Rural
12. Click "Save" and close section
13. Click triangle to open "Contacts" section
14. Type name of emergency contact
15. Click "add new contact"
16. Add all known information
17. Click "Save"
18. Close "Contacts" section
19. Click triangle to open "Assessments" section
20. Click "Add a new assessment"
21. Select the assessment that pertains to the intake form (SFID, CAT, or Congregate Meal Form)
22. Add home visit date
23. Click "Save"
24. Answer assessment questions from your intake forms
 - a. Fill out demographics (esp. poverty level), contacts, and nutritional sections
 - b. Remember to fill out eligibility category (demographics section)
25. Click "Save"
26. Double check all answers before locking client
27. Click triangle to open "Service Enrollments" section – select hard copy
28. Click "Add New Enrollment"
29. Fill in all known questions
 - a. Subcontractor is your tribal community
 - b. Scope of work is the service you are enrolling client for
 - c. Program is "Home and Community Based Services"
 - d. Add enrollment period (ongoing) E.g. 7/1/2017 – 12/31/9999
 - e. Add authorization period (one year) E.g. 7/1/2017 – 6/31/2018
 - f. Authorization quantity recommendation is 23 meals (if you provide one meal a day)
 - g. Period is a month
 - h. Click "Order"

Add Reassessment into DAARS

1. Open client's profile (see Adding a New Client instructions 1-3)
2. Click triangle to open "Assessments" section
3. Click "Add a new assessment"
4. Select the assessment that pertains to the intake form (SFID, CAT, or Congregate Meal Form)
5. Add home visit date
6. Click "Save"
7. Answer assessment questions from your intake forms
 - a. Fill out demographics (esp. poverty level), contacts, and nutritional sections
 - b. Remember to fill out eligibility category (demographics section)
8. Click "Save"
9. Double check all answers before locking client
10. Click arrow on "Service Enrollments" tab
11. Highlight service enrollment so it turns orange
12. Click "Edit Enrollment"
13. Click "Add New Enrollment" located between the authorization and schedule sections
14. Scroll down to new box
15. Enter new authorization period (1 year)
16. Add authorized quantity (23 meals per month)
 - a. Authorization quantity recommendation is 23 meals (if you provide one meal a day)
 - b. Period is a month
17. Click "Save"

Deleting/Un-enrolling Users

1. Highlight "Caretool" and click on "Full Client Search"
2. Search for client in "Full Client Search"
3. Click on client to open profile
4. Click triangle to open "Service Enrollments" section
5. Click "Edit" in the "Enrollment" Section
6. Change "Thru" date to day after last service was received
7. Select appropriate response from the "Reason" drop down menu
8. Click "Save" in "Enrollment Section"
9. Click "Save" on the bottom of the screen
10. In "Identification" section of the client's main profile click "edit" (next to client's name)
11. Click on the "View in Client Search" box
12. Click on the word that pertains to your client's circumstance
13. Click on "Save and Continue"

Recording Units for Registered Services (CGT, HDM, CGT)

1. Click on “Operations” to “Service Recording”
2. Select “Monthly Quantity Recording”
3. Select month/year you want to record
4. Region/Contractor is Inter Tribal Council of AZ, Inc.
5. Subcontractor is your tribal community
6. Scope of work is service you are recording – E.g. Home Delivered Meals
7. Click “Apply”
8. Find client’s name and type units in the box under the “Monthly Quantity” column next to their name
9. If you have a large number of clients, don’t forget to fill units in additional pages by clicking “Next”
10. After all units have been entered, click “Save”

Entering Units for Non-Registered Services (TSP)

1. Click on “Operations” to “Service Recording”
2. Select “Monthly Quantity Recording”
3. Select month/year you want to record
4. Region/Contractor is Inter Tribal Council of AZ, Inc.
5. Subcontractor is your tribal community
6. Scope of work is service you are recording
7. Click “Apply”
8. Enter monthly quantity in the “non-registered” row (1st row)
9. Click “Save”

Commonly Generated Reports

- Service Unit Roster - can be used as a sign in sheet for registered services
- Reassessment Report – gives information on which clients need to be reassessed
- Agency Units Report – gives information on amount of units provided each month
 - Give this to the finance department

Creating Reports

1. There are two ways to get to the reports section of the site:
 - a. Hover over the “Reports” tab on the top right corner of the screen and click on the report you want to create
 - b. Click on “Operations” then “Reporting” then “Reports”
2. Select dates (One month) you want to generate on the report
3. Region/Contractor is Inter Tribal Council of AZ, Inc.
4. Subcontractor is your tribal community
5. Scope of work is service you are recording
6. Select Report Export Type (either PDF or excel)
7. Optional: Select “Generate report in the background” if you want to use other areas of DAARS while waiting for your report

- a. If you generate a report it will show as completed in “notices” located in the top middle of the screen
8. Click “Run Report”
9. Your report may show as downloaded in the bottom bar of your internet screen or may automatically open
10. Verify that the DAARS report matches your records
11. Send report to finance department