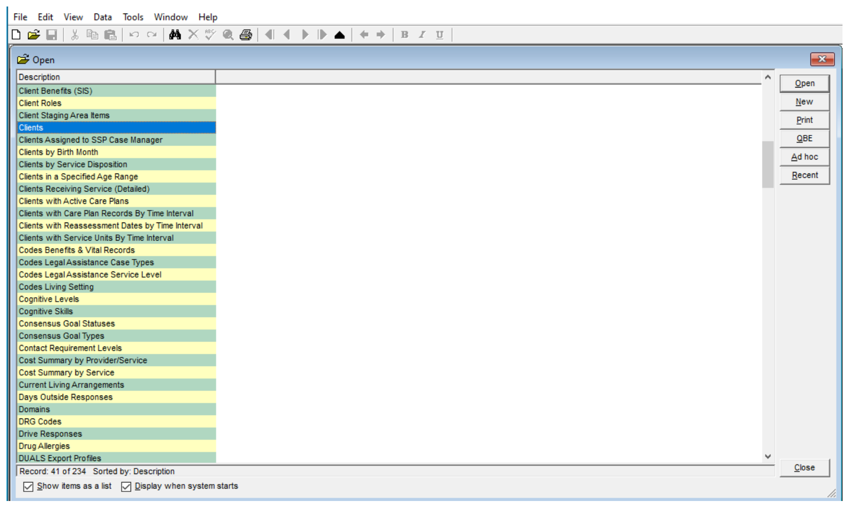
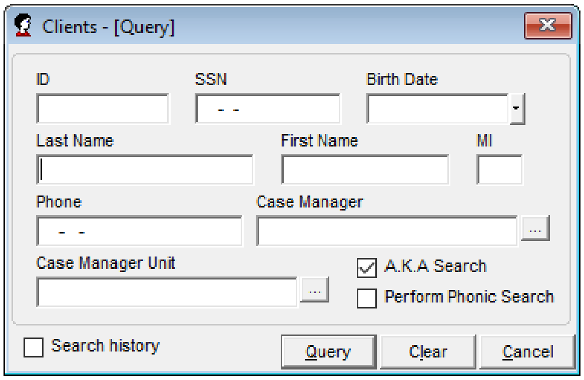
# Q Continuum System User Guide

## Congregate Meals and Home Delivered Meals

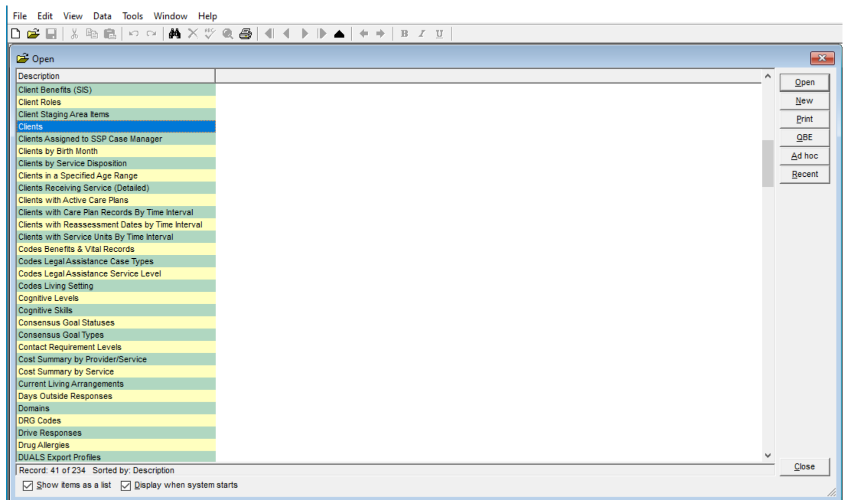
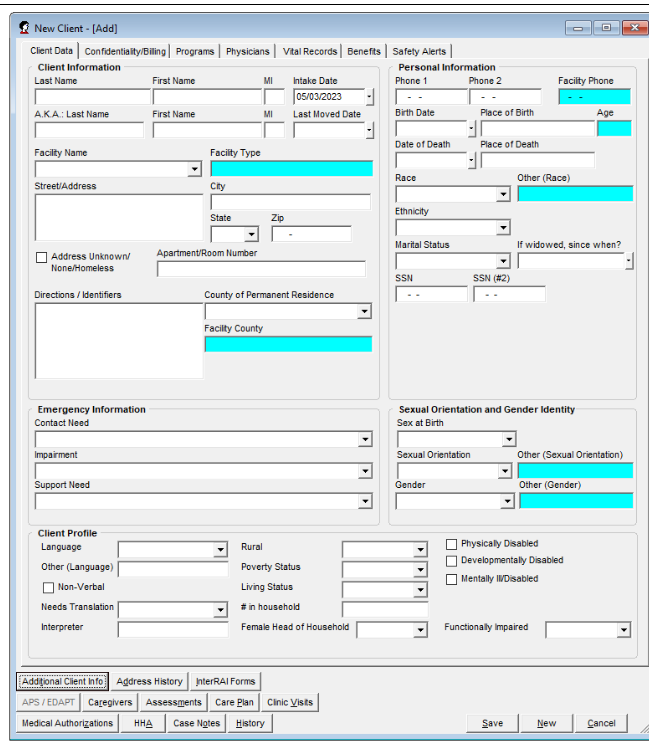
**Q 1: I have a new client. How do I know if I should create a new client file in Q or enter new data to the existing client file? the client is?**

**A 1: Clients who already are registered to other OAA programs have a file created in Q. Look up for this client's file. New clients have no files.**

<table>
<tr><th>Step</th><th>Description</th><th>Picture</th></tr>
<tr><td>1</td><td>Select "Client" on the first page.</td><td>
</td></tr>
<tr><td>2</td><td>Look up this client with first name, last name, date of birth and/or phone number.</td><td rowspan="2">
</td></tr>
<tr><td>3</td><td>Click on "Query".</td></tr>
<tr><td>4</td><td>Look for your client from the result.</td><td></td></tr>
</table>

**Q 2: I have a new client. I have looked up the client from the existing list in Q but there is NO match. What do I do?**

**A 2: Create a new client file.**

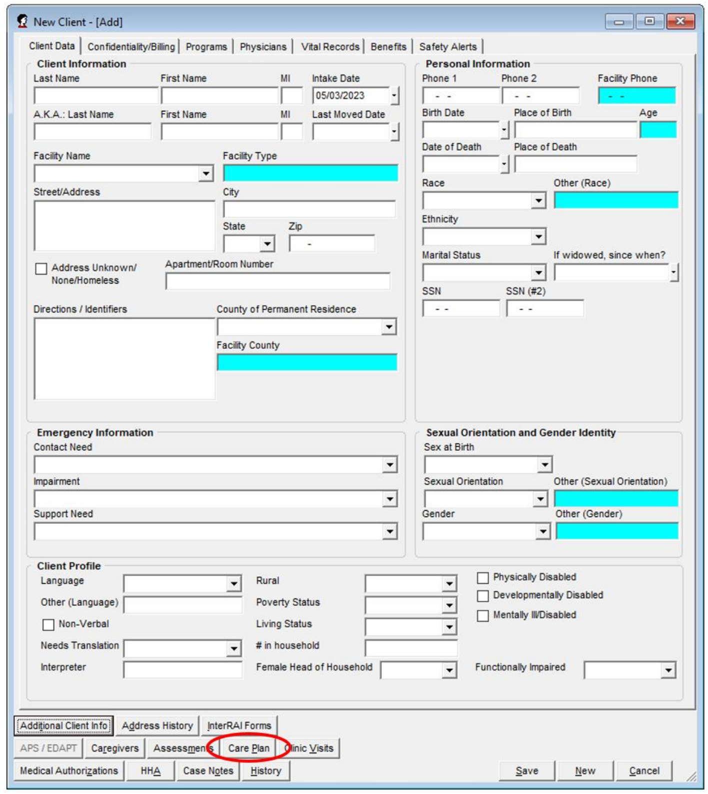
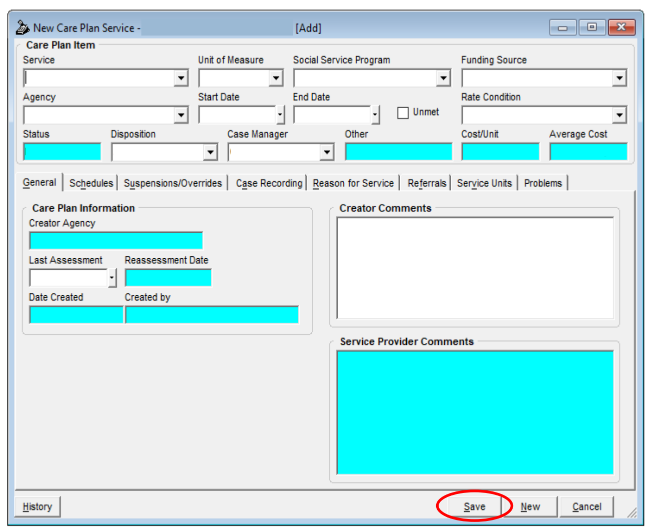
| Step | Description | Picture |
|---|---|---|
| 1 | Select “Client” on the first page. |  |
| 2 | Go to top left hand conner and click on 🗋 icon to create a new client file. |  |
| 3 | Fill out the following client data:<br>• First name (all Caps)<br>• Last name (all Caps)<br>• Address (all Caps)*<br>• Phone number<br>• Date of birth**<br>• Race<br>• Marital status<br>• Rural/Urban<br>• Sex at birth<br>• Sex orientation<br>• Gender<br><br>Click on “Save.” | |

Note:

- Data listed above are mandatory for intake and are required by California Department of Aging for data reporting. Other sections are optional, but it is highly recommended.
- Select applicable description from drop down menus for blue-highlight sections.
- * If City is not provided, enter “000”
- ** If exact date is not provided, enter January 1. Birth year is required.

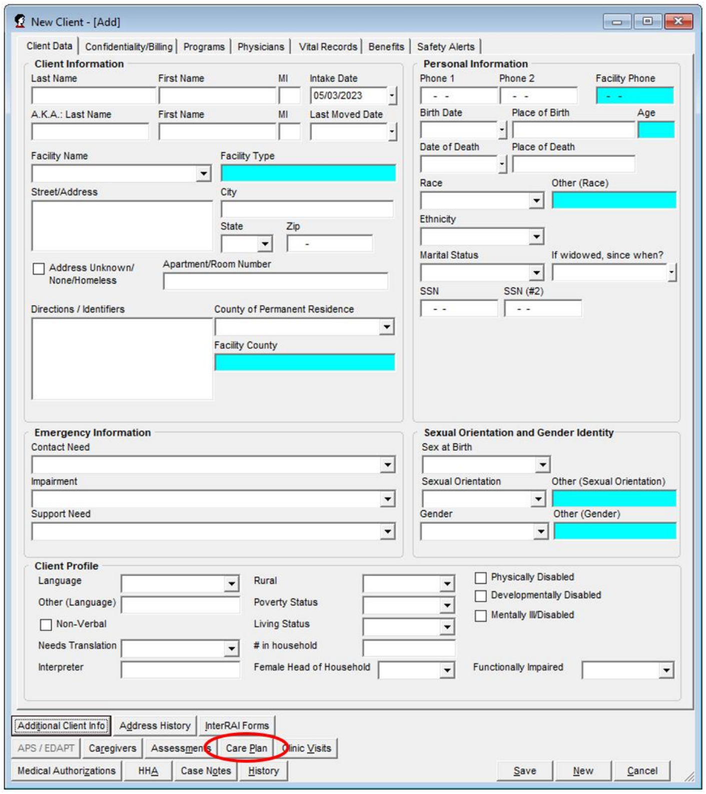
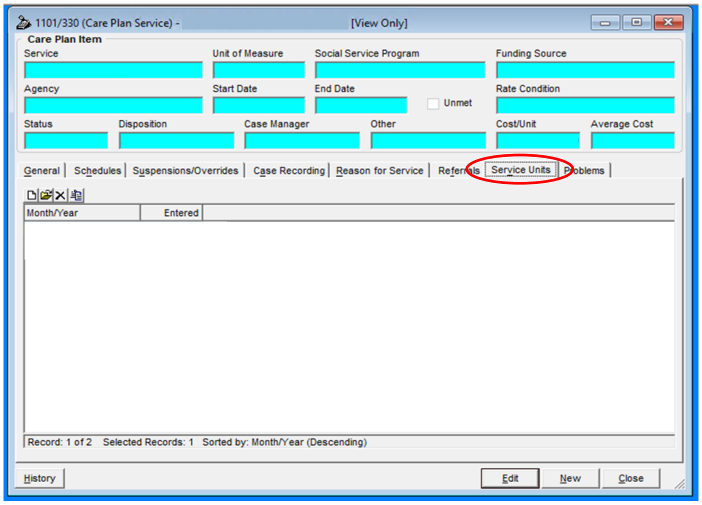
**Q 3: I have a new client and the client has an existing file in Q. What’s next?**

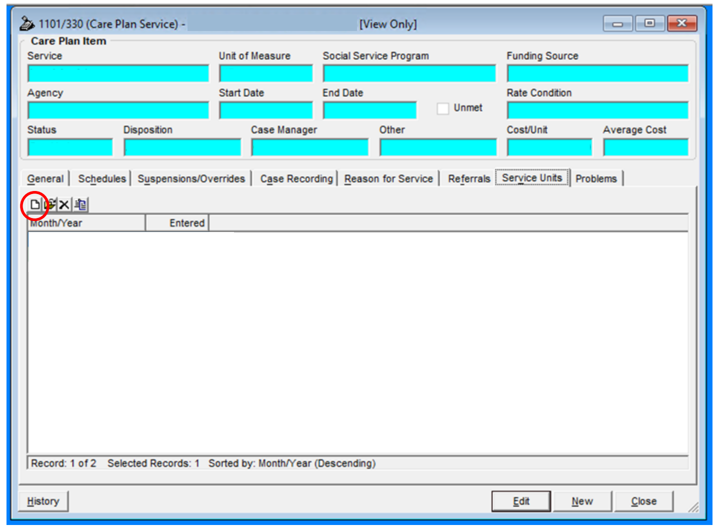
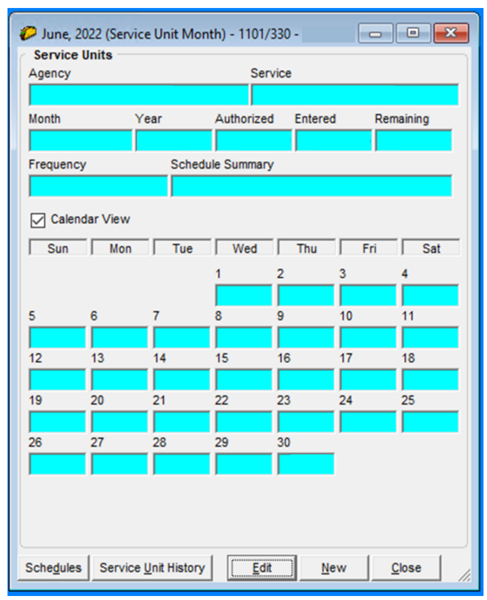
**A 3: Create a new care plan.**

<table>
<tr><th>Step</th><th>Description</th><th>Picture</th></tr>
<tr><td>1</td><td>Open the client file. Select “Care Plan” tab.</td><td>
</td></tr>
<tr><td>2</td><td>Go to top left hand conner and click on icon to create a new care plan.</td><td rowspan="2">
</td></tr>
<tr><td>3</td><td>Fill out the following client data:<br>• Service*<br>• Social service program<br>• Funding source<br>• Agency<br>• Start Date**<br><br>Click on “Save.”</td></tr>
<tr><td colspan="3">Note:<br>• * Look for description in lower case letters. Others are not OAA programs.<br>• ** Select beginning of the month.</td></tr>
</table>

**Q 4: How do I enter Units of Service provided to a client in Q?**

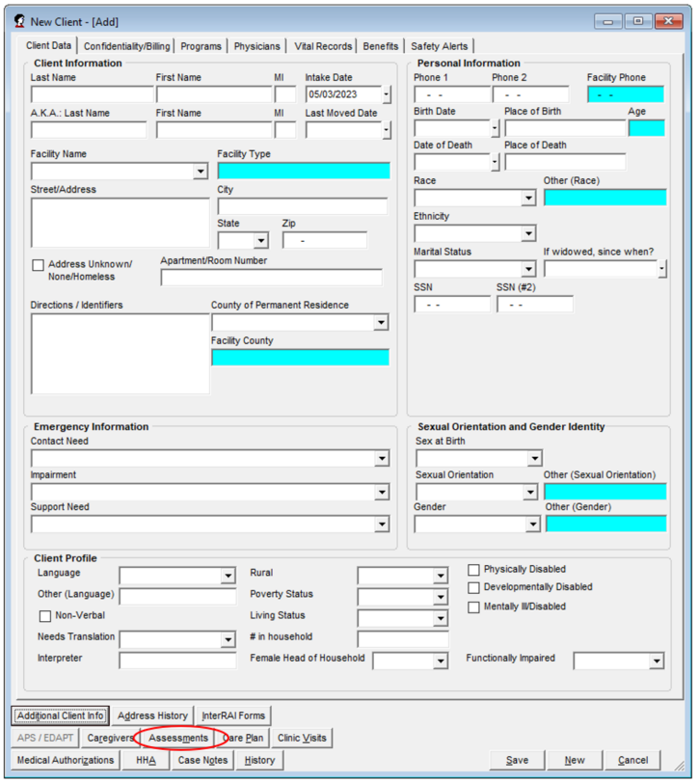
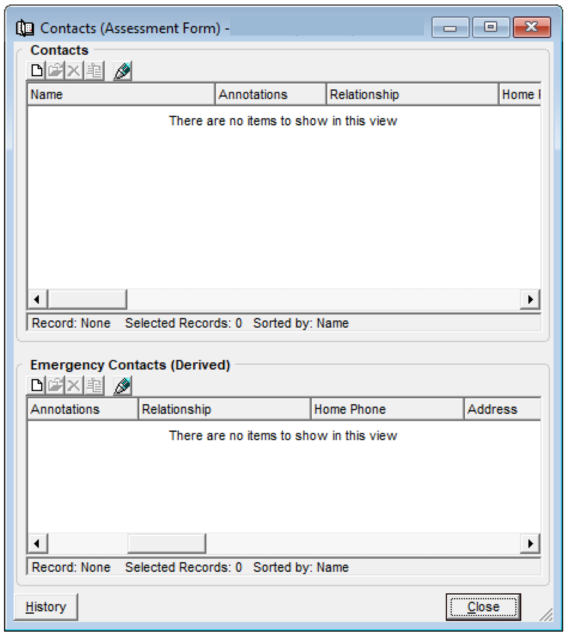
**A 4: Create a new service unit report in client's care plan.**

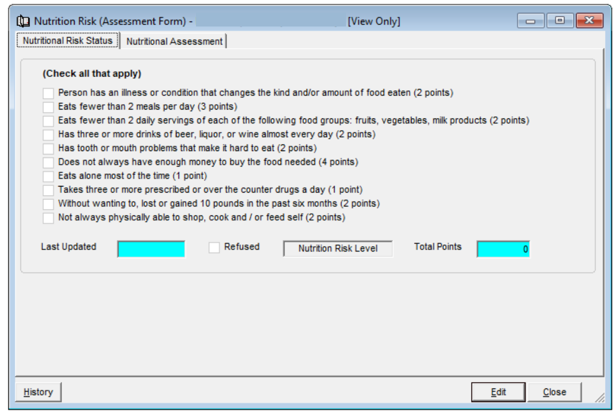
<table>
<tr><th>Step</th><th>Description</th><th>Picture</th></tr>
<tr><td>1</td><td>Open the client file. Select "Care Plan" tab.</td><td>
</td></tr>
<tr><td>2</td><td>Select applicable service. Select "Service Units" tab.</td><td>
</td></tr>
</table>

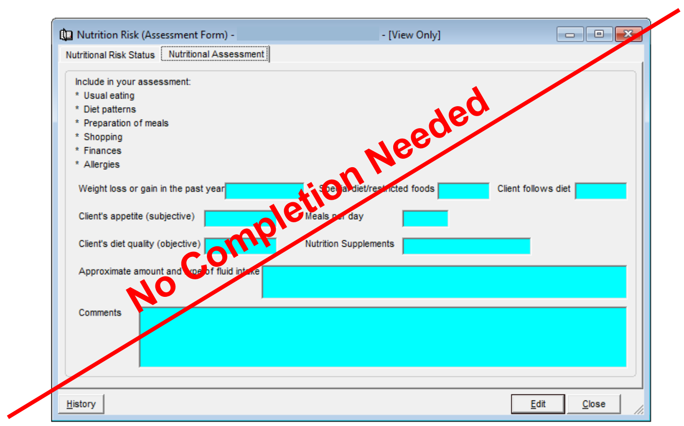
| | | |
|---|---|---|
| 3 | Go to top left hand conner and click on icon to create a new unit of service report. |  |
| 4 | Click on "Edit."<br><br>Select the applicable month and year and enter units of services for each day.<br><br>Click on "Save." |  |

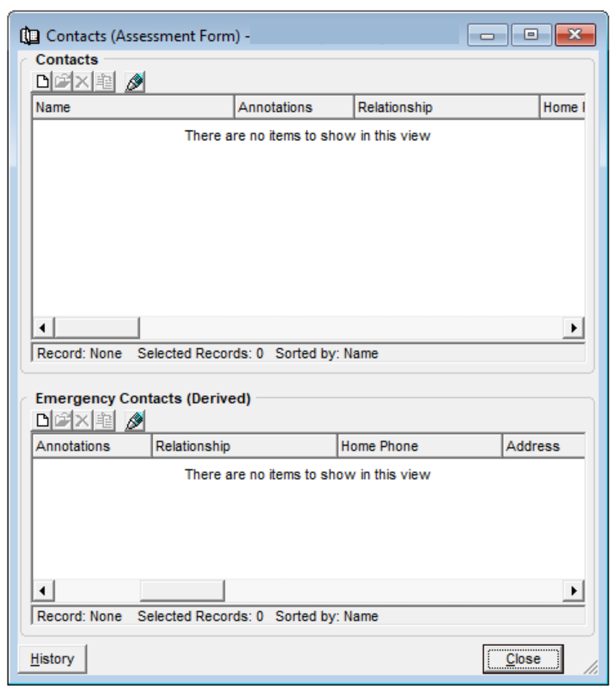
Q 5: How do I enter client assessment data in Q?

A 5: Create a new assessment report in client’s assessment file

| Step | Description | Picture |
| --- | --- | --- |
| 1 | Open the client file. Select “Assessment” tab. |  |
| 2 | Home Delivered Meals service providers select “California NAPIS – only ADLs/IADLs” tab. Enter data based on assessment.<br><br>Congregate Meals service providers skip this step. |  |

<table>
<tr>
<td>3</td>
<td>Select “Nutrition Risk” tab. Both Congregate Meals and Home Delivered Meals service providers are required to complete this section.<br><br>Complete only the “Nutrition Risk Status” tab.</td>
<td>




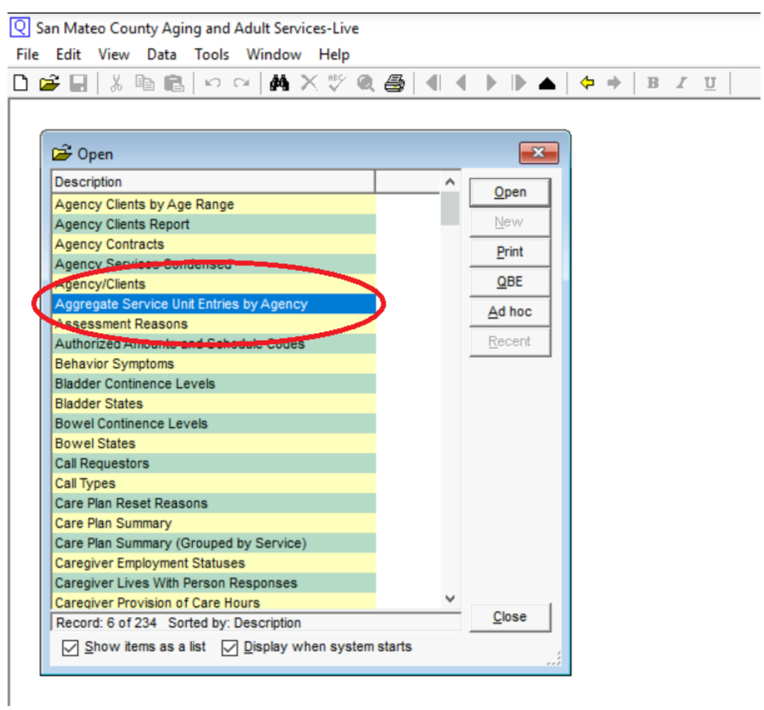
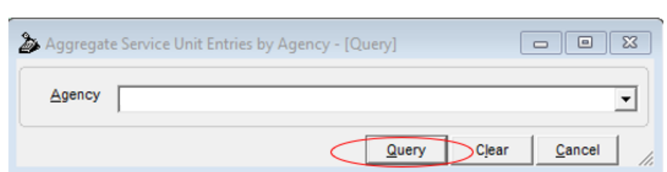
</td>
</tr>
<tr>
<td>4</td>
<td>Select “Contacts” tab and enter client’s general contact and emergency contact information.</td>
<td>


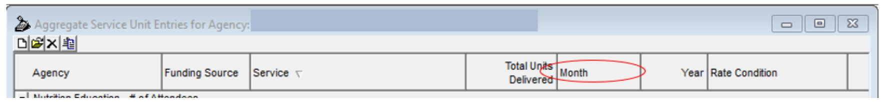
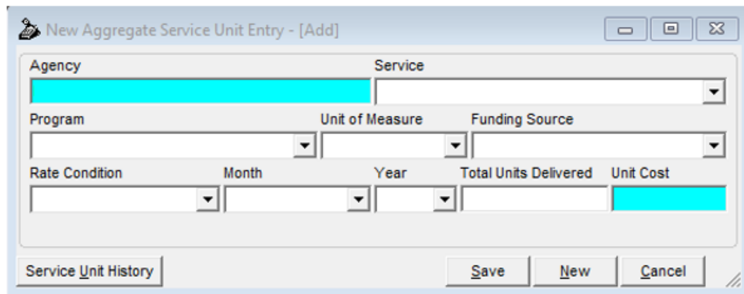
</td>
</tr>
</table>

**Q 6: What do I need to do in Q before submitting paperwork, i.e. MIS Reports and invoices, to AAA?**

**A 6: Enter data in Aggregate Service Unit Entries found in the launcher. Such aggregate entries include:**

1) **Congregate $ Amt of Non-Sr contributions**
2) **Congregate $ Amt of Senior contributions**
3) **Congregate Number of Days Meals Served**
4) **Congregate Total Meals Ordered**
5) **HDM-# of Days Meals Provided**
6) **HDM-# on wait list**
7) **HDM-# Amt Non-Sr contributions (Supplemental Program only)**
8) **HDM-# Amt Senior contributions**
9) **HDM-Total Meals Ordered**
10) **Nutrition Education (aka Nutrition Ed Sessions)**
11) **Nutrition Education - # of Attendees**

<table>
<tr><th>Step</th><th>Description</th><th>Picture</th></tr>
<tr><td>1</td><td>Select “Aggregate Service Unit Entries” tab.</td><td>
</td></tr>
<tr><td>2</td><td>Select your organization from the drop down. Click on “Query”.</td><td>
</td></tr>
</table>

| | | |
|---|---|---|
| 3 | Click on “Month” |  |
| 4 | Go to top left hand conner and click on icon to create a new tab.<br><br>Select services and funding source from drop down<br><br>Select month and year.<br><br>Make sure the data matches the MIS Reports.<br><br>Click on “Save.” |  |

**Q 7: How do I enter units of service for clients under 60 years old?**

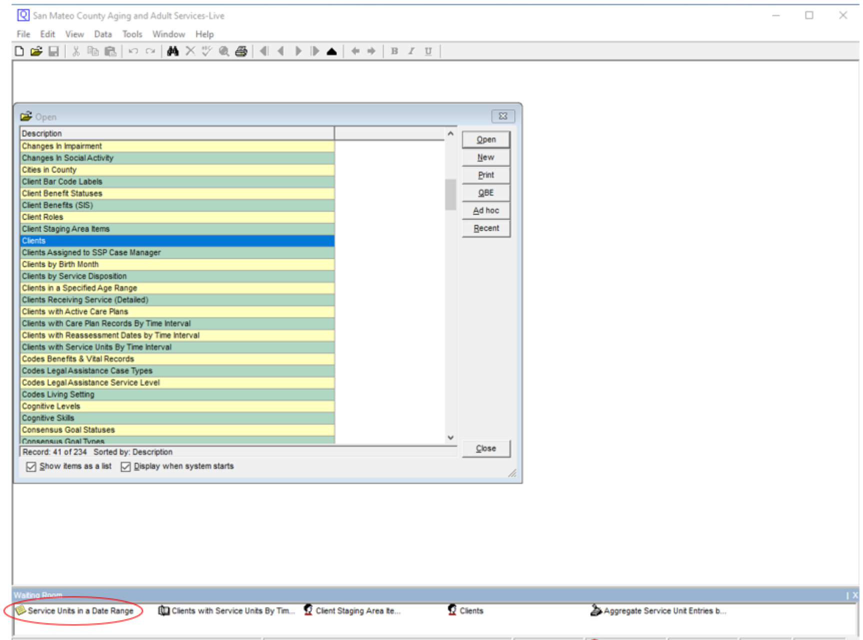
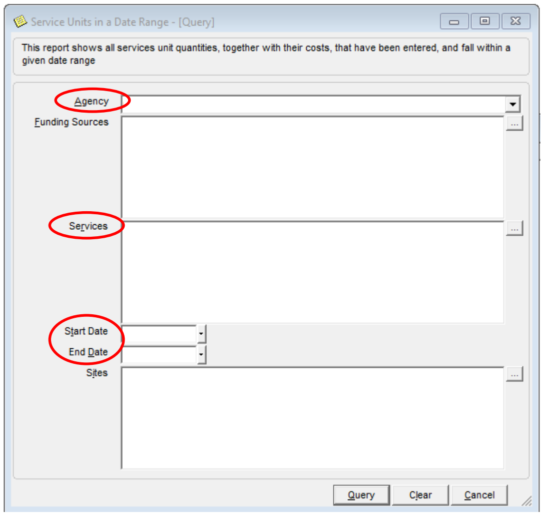
**A 7: To enter units of service for non-senior guests, volunteers, and spouses under the age of 60 can be looked up under the following client “names”:**

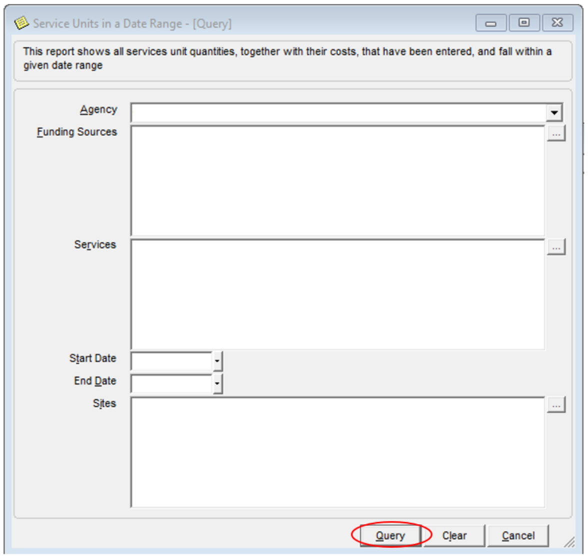
1) **ZZ-Volunteer, Non-senior**
2) **ZZ-Spouse, Non-senior**
3) **ZZ-Guest, paying**
4) **ZZ-Non Senior, Disabled**

**Disclaimer: verify client eligibility with AAS beforehand**

**Q 8: How do I pull up monthly report to cross check and verify MIS reports and see if clients are under 60**

**A 8: Generate a Q Entry Report.**

| Step | Description | Picture |
|---|---|---|
| 1 | Select “Service Units in a Data Range” tab. |  |
| 2 | Select your organization from the drop down.<br><br>Select applicable service.<br><br>Select start date and end date. |  |

| | | |
|---|---|---|
| 3 | Click on “Query” and combination “Ctrl P” to get your  Q entry report.<br><br>To obtain a report by age in ascending order, Click on “Service Unit View by Age.” Apply to print. |  |