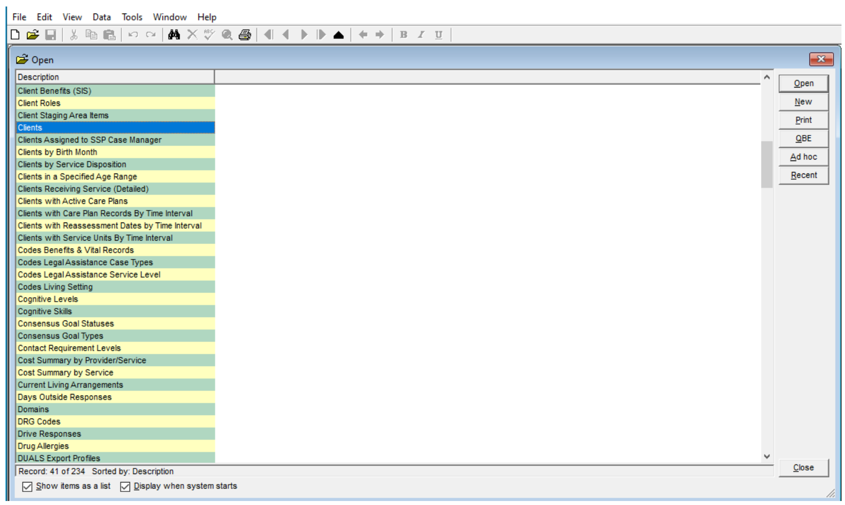
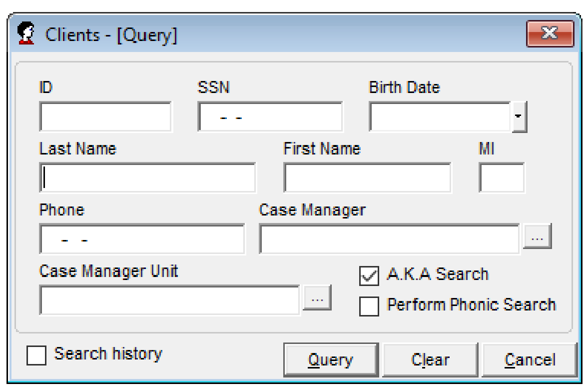
COUNTY OF SAN MATEO

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.

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

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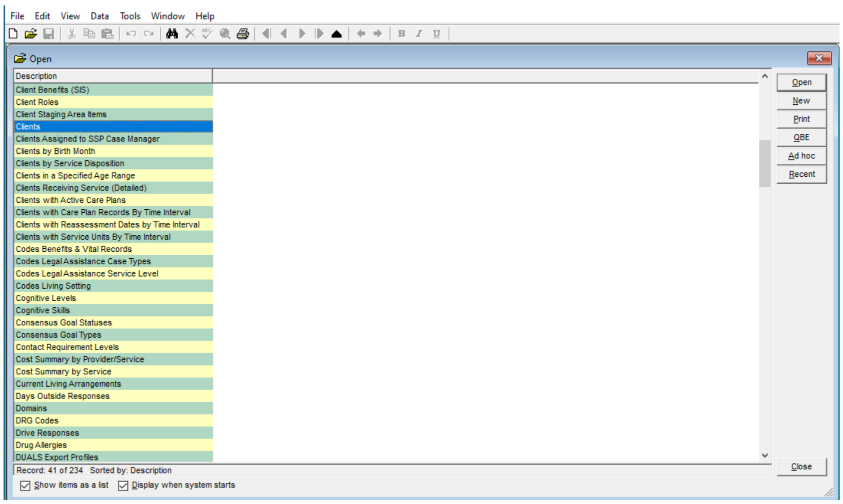
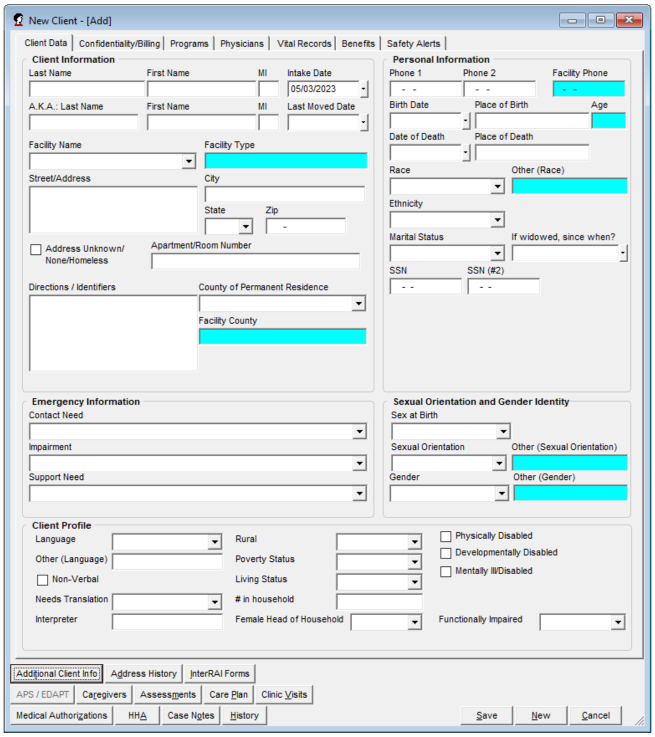
Q 2: I have a new client. I have looked up the client from the existing list in Q but there is NO match. What do I do?

A 2: Create a new client file.

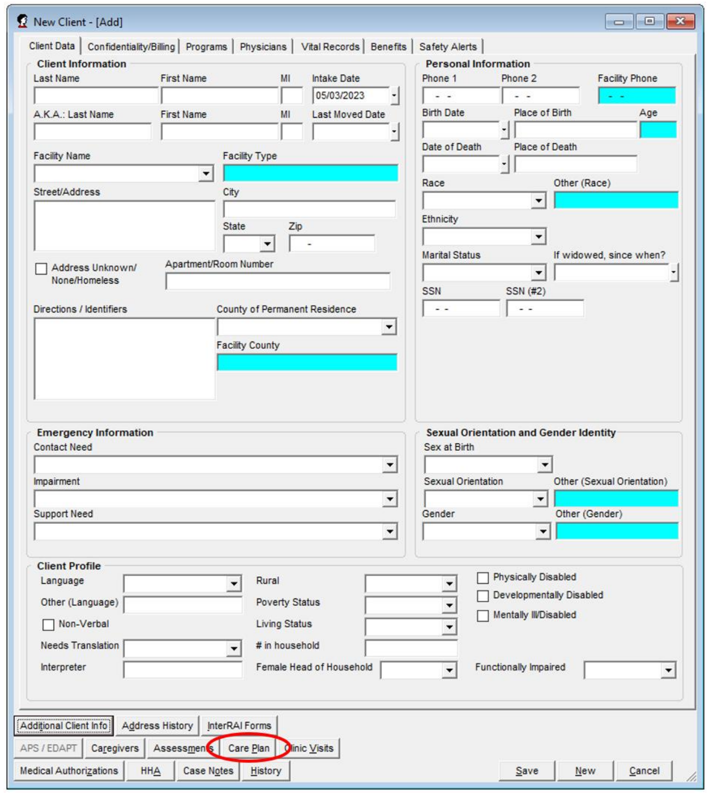
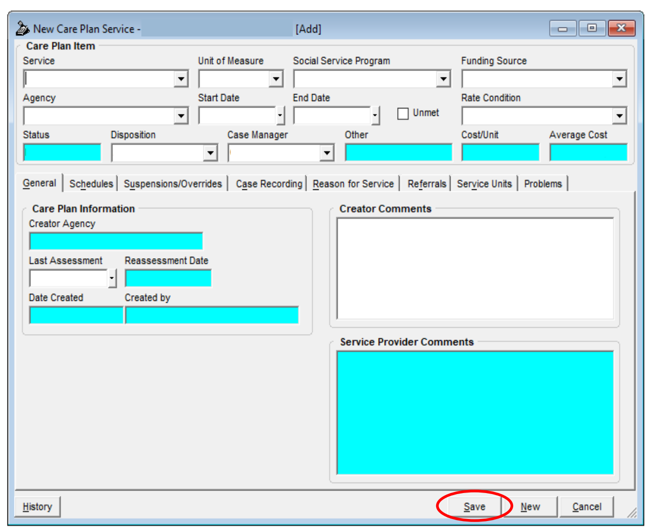
Step	Description	Picture
1	Select “Client” on the first page.	
2	Go to top left hand conner and click on 🗋 icon to create a new client file.	
3	Fill out the following client data: • First name (all Caps) • Last name (all Caps) • Address (all Caps)* • Phone number • Date of birth** • Race • Marital status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

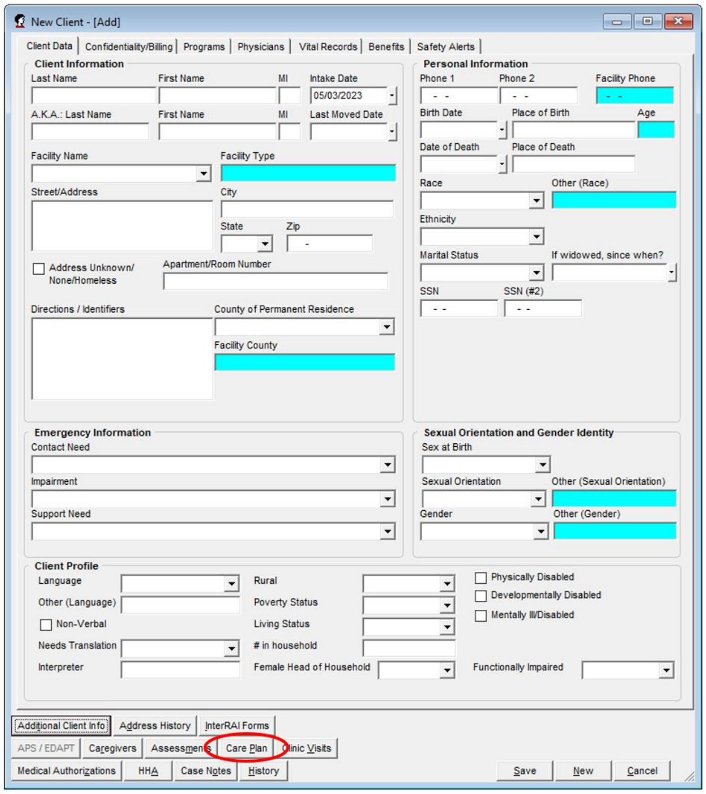
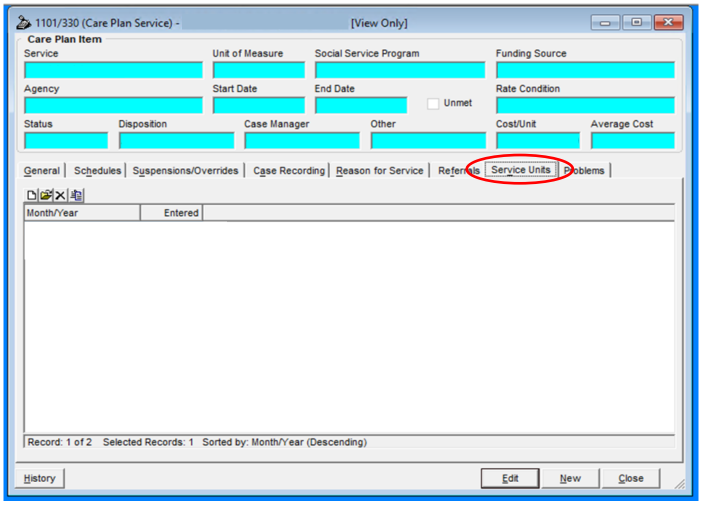
Q 3: I have a new client and the client has an existing file in Q. What's next?

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:
Service*
Social service program
Funding source
Agency
Start Date**
Click on "Save."</td></tr>
<tr><td colspan="3">Note:
* Look for description in lower case letters. Others are not OAA programs.
** 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.

Step	Description	Picture
1	Open the client file. Select "Care Plan" tab.	
2	Select applicable service. Select "Service Units" tab.	

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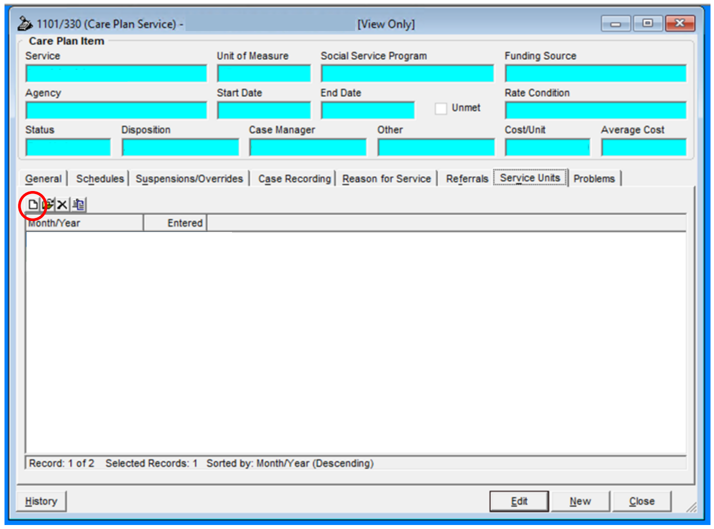
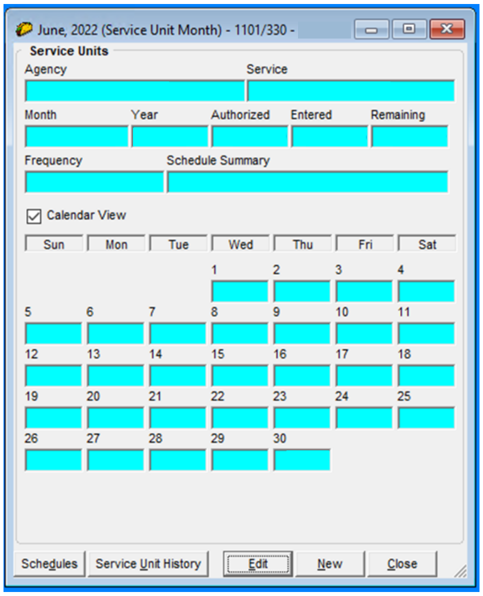
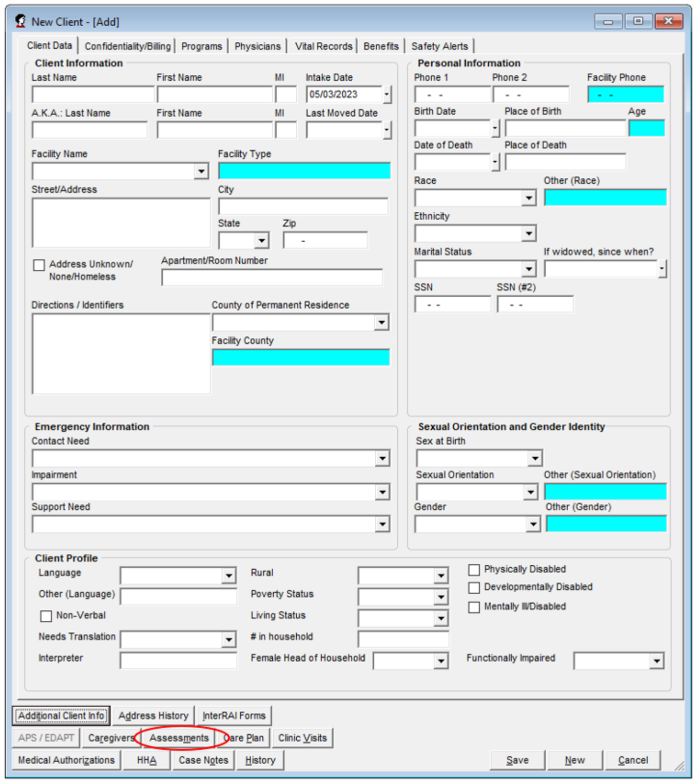
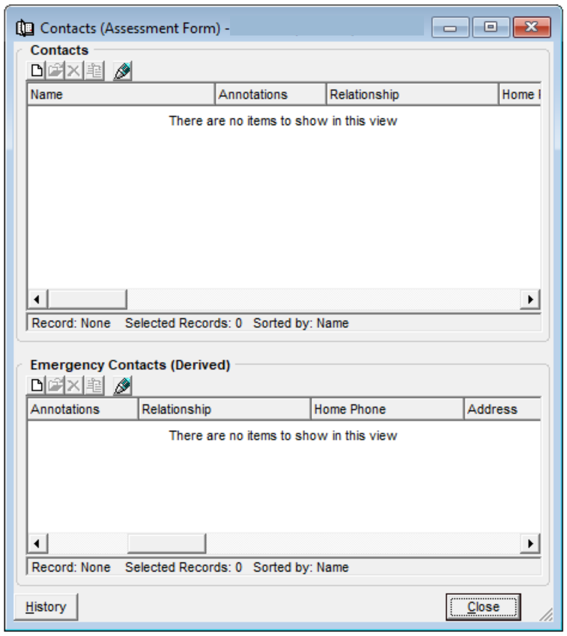
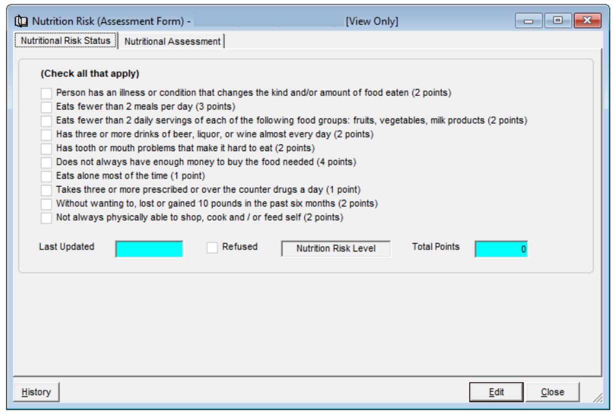
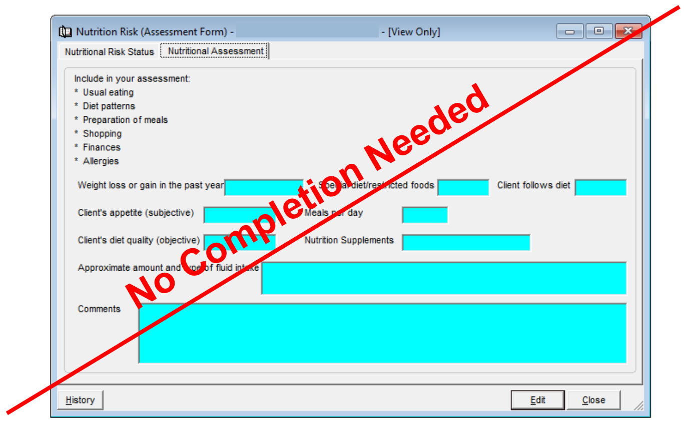
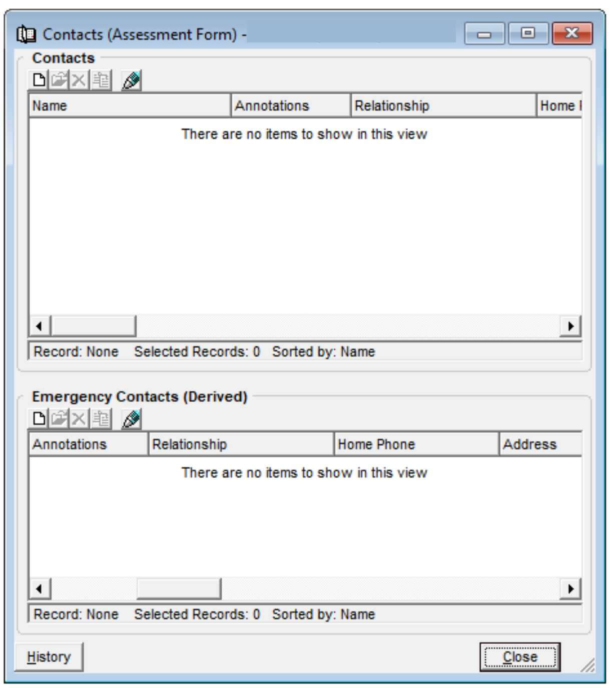
3	Go to top left hand conner and click on icon to create a new unit of service report.	
4	Click on "Edit." Select the applicable month and year and enter units of services for each day. Click on "Save."	

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

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

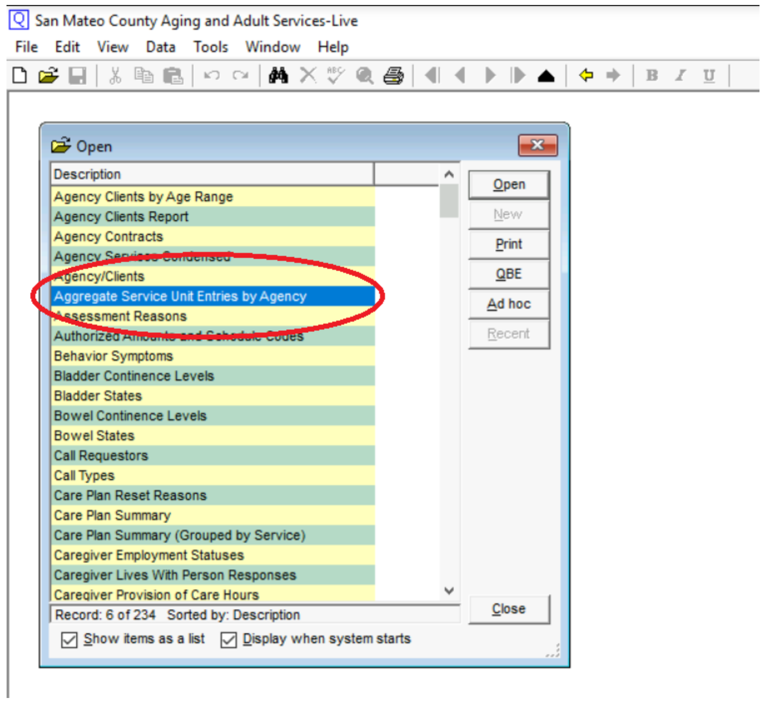
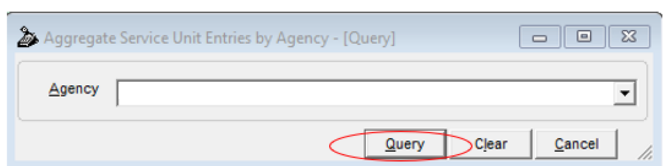
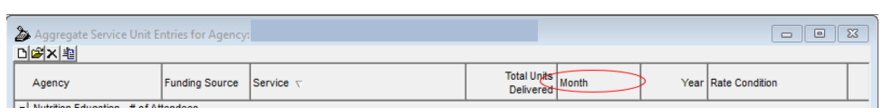
<table>
<tr><th>Step</th><th>Description</th><th>Picture</th></tr>
<tr><td>1</td><td>Open the client file. Select “Assessment” tab.</td><td>
</td></tr>
<tr><td>2</td><td>Home Delivered Meals service providers select “California NAPIS – only ADLs/IADLs” tab. Enter data based on assessment.

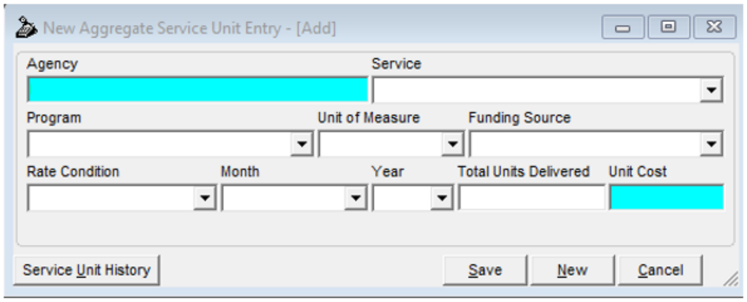
Congregate Meals service providers skip this step.</td><td>
</td></tr>
</table>

3	Select “Nutrition Risk” tab. Both Congregate Meals and Home Delivered Meals service providers are required to complete this section. Complete only the “Nutrition Risk Status” tab.	 
4	Select “Contacts” tab and enter client’s general contact and emergency contact information.	

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

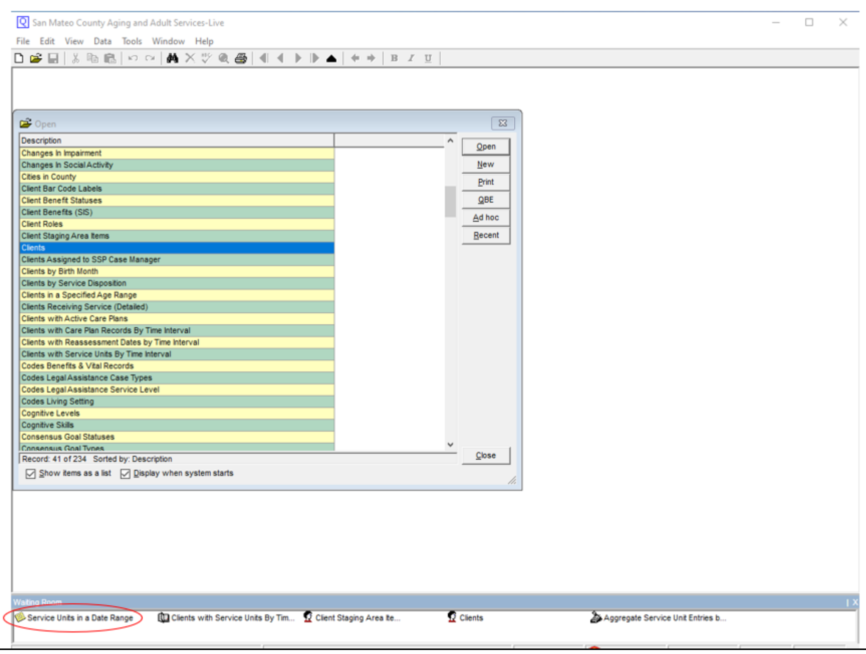
A 6: Enter data in Create a new assessment report in client’s assessment file

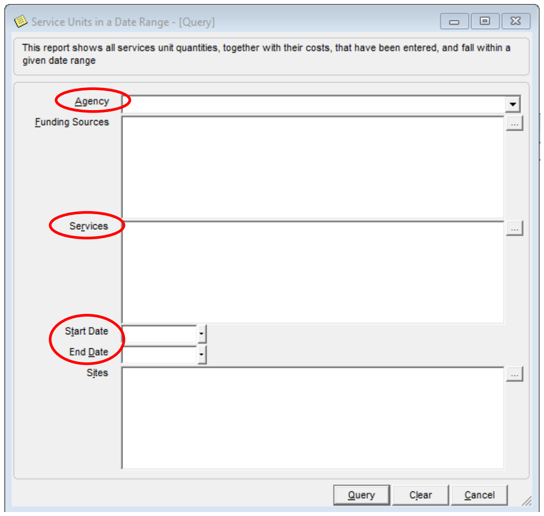
<table>
<tr><th>Step</th><th>Description</th><th>Picture</th></tr>
<tr><td>1</td><td>Select “Aggregate Service Unit Entries” tab.</td><td>
</td></tr>
<tr><td>2</td><td>Select your organization from the drop down. Click on “Query”.</td><td>
</td></tr>
<tr><td>3</td><td>Click on “Month”</td><td>
</td></tr>
</table>

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

Q 7: How do I pull up monthly report to cross check and verify MIS reports and see if clients are under 60

A 7: 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. Select applicable service. Select start date and end date.	
3	Click on "Query" and combination "Ctrl P" to get your Q entry report. To obtain a report by age in ascending order, Click on "Service Unit View by Age." Apply to print.