

TANABE SYSTEMS

DATA YOU CAN TRUST

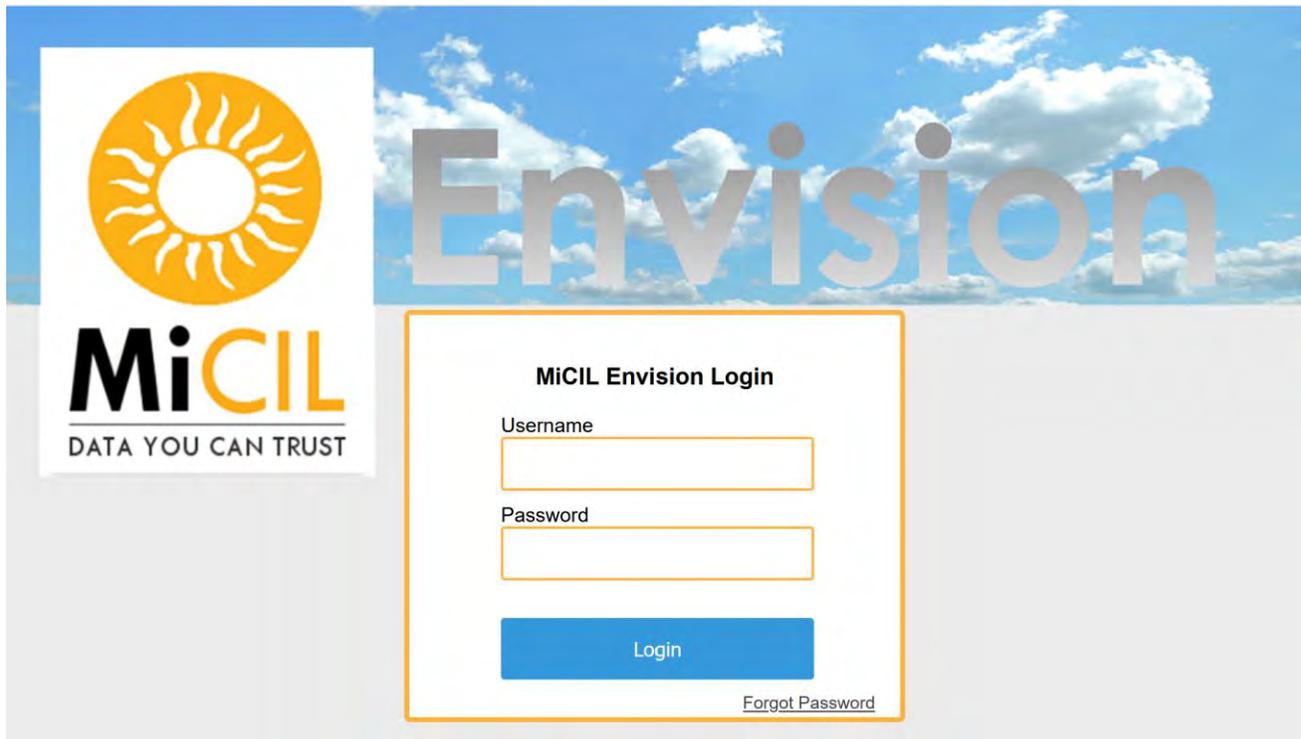
MICIL Envision Training Manual





MICIL Training Manual Table of Contents

A)	Table of Contents	1
B)	Log-In Page	2
C)	Main Menu Screen	3
D)	People Search/Groups	4
E)	People Search – Missing Data.....	5
F)	Community Activities/General Services	6
G)	Reports Menu Screen	7
H)	Intro to Callers/Consumers	9
I)	I & R Callers	12
J)	Consumer Entry	17
K)	Consumer Goals	23
L)	Consumer Services/Notes	28
M)	Staff (Active Case List)	32
N)	Closing a Consumer	33
O)	Group Services	37
P)	Community Outreach	40
Q)	Satisfaction Survey	44
R)	General Services	47
S)	Staff Timesheet	48



- Navigate to your MiCIL Envision site.
- Enter your username and **MICIL** password.
- A small link to the bottom right “Forgot Password” will email you a password reset.
- Note: 3 wrong password attempts will lock your account and you will need to contact your Administrator to get it unlocked.



After logging in: Navigate through the MICIL Menu Bar

- You may open multiple windows.
Open People Search on one, and Reports on another for example.
- Menu Options are:
- Staff Center (Alt+S) – Quick Staff List of Consumers and I&R Calls needing Follow-Up
 - People Search (Alt+P) – Search for all people.
 - Groups – Group services and can be used for mass communication.
 - Community Activity – tracks to the PPR/704 Report
 - General Services – tracks staff time in addition to consumers, I&R, and Community
 - Reports
 - Admin
 - Themes
 - Logout

Main Menu Screen- Staff Center

Staff Center (Alt+S): Access your Staff List- toggle between Active/Closed Consumers

- Double click on a Consumer name to go to the Consumer Service Request screen
- **New Note** button will add a new Service Note for this Consumer's Case
- **Send Email** button to send a email to the consumer.
- **Address...** button will go to the Address/Demographic screen
- **Show Closed Consumers** check box will toggle to view closed consumers
- **Consumer Survey** button will open a general consumer survey screen.
- **Print Consumer List** button will open a report to print your consumer phone list.
- **Daily Time Check** button will allow staff to quickly check their time entries.
- **How To Add Consumer to List** button shows how to add a person to a Staff list.

People Search (Alt+P): Find all People names here regardless of Active or Closed status.

People Search

Search fields: Last Name, First Name, Phone, Birthdate, People ID, Organization, SSN, Search All?, My Consumers.

Consumer Quick Filters: Active 19, Closed 3, Contacts Overdue 8, Missing Data 18.

Caller Quick Filters: Total I&Rs 8, Follow Ups 7, Volunteers 1, Active Volunteers.

Full Name (Last, First Middle)	Phone	Birth Date	Type	Person Type
feamale, test			Consumer	
A, Anonymous Female				
A, Anonymous Male				
Aaker, Empty	(505) 000-5555	01/01/1966	Consumer	
Amann, Sammy	(414) 323-4234	01/01/1980	Consumer	Community Member
Arowsmith, A			Consumer	
Benson, Sandra Sanmson	(907) 444-4444	01/01/1954	Consumer	
Bluma, DJ	0	04/30/1960	Consumer	Attendant or Aid
Braceros, Kristine Mae	(808) 670-5972	10/15/1996		Person With Disability
Brown, Sammy			Consumer	
Cox, Kristin	(414) 477-3234	10/05/1972	Consumer	
daniel, farming		01/01/1962	Consumer	.Rascal Alert
Doe, John	(111) 222-3333	01/01/1973	Consumer	Person With Disability
Grande, Tom Calhoun	(880) 123-4567	01/01/1973	Consumer	Service Provider
Ho, Someone				Service Provider
Hoffa, Jimmy	(414) 478-2123		Consumer	Attendant or Aid
Jonson, Michelle		01/01/1972	Consumer	Family/Friend of Client
Lee, Sarah		03/03/1963	Consumer	

Page 1 of 41 | View 1 - 41 of 100

Search fields: Last Name, First Name, Phone, Birthdate, People ID, Organization, SSN.

Search All? - Use to limit people list to only those who have once been a consumer.

'My Consumers' - Use to limit people to your Active/Closed/Contacts Overdue/ or Missing Data list.

Consumer Quick Filters: Active/Closed/Contacts Overdue/Missing Data are looking at all names during the current year.

Alt+V – will jump to View the Search Results

Alt+N – will jump to the 'Add New Person...' button

Groups: Easily enter Groups with Consumer Service Notes or for recording mass communication. People entered in Groups will be counted on the PPR/704 in Individual Services.

Group Service Search

Search filters: Session Name, Group Type, Office Name, Staff Name (MiCIL Support), Start Date, End Date.

Search buttons: Search, Reset Search, New Group Record.

Service Date	Session Name	Service Type	Funder	Office/Unit
08/12/2022	Attendance	Meal Delivery	SHIP	ILC ADRC
03/01/2021	Test Name	Family Support Group	Covid Cares Act	SAIL ADRC

Missing Data:

Use the **'My Consumers'** dropdown menu to find only your consumers that are missing data.

MiCIL is looking for missing: Gender; Birthdate; County; Race; Disability and IL Plan Accepted or Waived.

Use the **'Missing Data'** button to find any people who are missing data.

The screenshot shows the 'People Search' interface. On the left, there are search filters: Last Name, First Name, Phone Number, Birthdate, People ID, Organization, SSN, Search All?, and My Consumers (highlighted with a red circle). Below these are 'Consumer Quick Filters' (Active 19, Closed 3, Contacts Overdue 8, Missing Data 18) and 'Caller Quick Filters' (Total I&Rs 8, Follow Ups 7, Volunteers 1, Active Volunteers). On the right, there is a table titled 'Active People' with columns: Full Name (Last, First Middle), Phone, Birth Date, Type, and Person Type. The table lists various individuals with their contact information and roles.

Full Name (Last, First Middle)	Phone	Birth Date	Type	Person Type
feamale, test			Consumer	
A, Anonymous Female				
A, Anonymous Male				
Aaker, Empty	(505) 000-5555	01/01/1966	Consumer	
Amann, Sammy	(414) 323-4234	01/01/1980	Consumer	Community Member
Arowsmith, A			Consumer	
Benson, Sandra Sanmson	(907) 444-4444	01/01/1954	Consumer	
Bluma, DJ	0	04/30/1960	Consumer	Attendant or Aid
Braceros, Kristine Mae	(808) 670-5972	10/15/1996		Person With Disability
Brown, Sammy			Consumer	
Cox, Kristin	(414) 477-3234	10/05/1972	Consumer	
daniel, farming		01/01/1962	Consumer	.Rascal Alert
Doe, John	(111) 222-3333	01/01/1973	Consumer	Person With Disability
Grande, Tom Calhoun	(880) 123-4567	01/01/1973	Consumer	Service Provider
Ho, Someone				Service Provider
Hoffa, Jimmy	(414) 478-2123		Consumer	Attendant or Aid
Jonson, Michelle		01/01/1972	Consumer	Family/Friend of Client
Lee, Sarah		03/03/1963	Consumer	

Check each day and add-in the missing data of your Clients or I&R people.

Other ways to manage missing data:

1. Report Group: Federal Reports has:
 - "Consumer Missing Data" report
 - "704 PPR NameList Excel" report will list all names included in your PPR/704 report and will show a column for all the demographics.
2. Dynamic Lists: "Demographics" can be used to search for missing data.

Community Activity: Enter Community Events and Community Objectives here.

Staff Center | People Search | Groups | **Community Activity** | General Services | Reports - | Admin - | The

Community Activities Search

Organization: Staff Name: MICIL Support

Office/Unit Name: Start Date:

Activity Area: End Date:

Outreach Goal: Missing Data:

Community Activity				
Service Date	Service Name	Organization	Office/Unit	Activity Area Type
08/13/2024	Meaningful Name	Autism , ADHD, Developmental delays support group		Collaboration/Networking
09/07/2023	Give it a Name meaningful	Accessible Space, Inc.	SAIL ADRC	Collaboration/Networking
10/03/2022	Operations AM selected below	Above & Beyond Care Professionals		zunknowntest
10/03/2022	Operations AM			Community Education

General Services: MICIL is capable to track all employee time, including vacation. Use General Services to track all additional time such as Staff Meeting, Trainings, Travel and Administrative Coordination Time.

Staff Center | People Search | Groups | Community Activity | **General Services** | Reports - | Admin -

General Services Search

Service Type:

Office/Unit Name:

Staff Name: MICIL Support

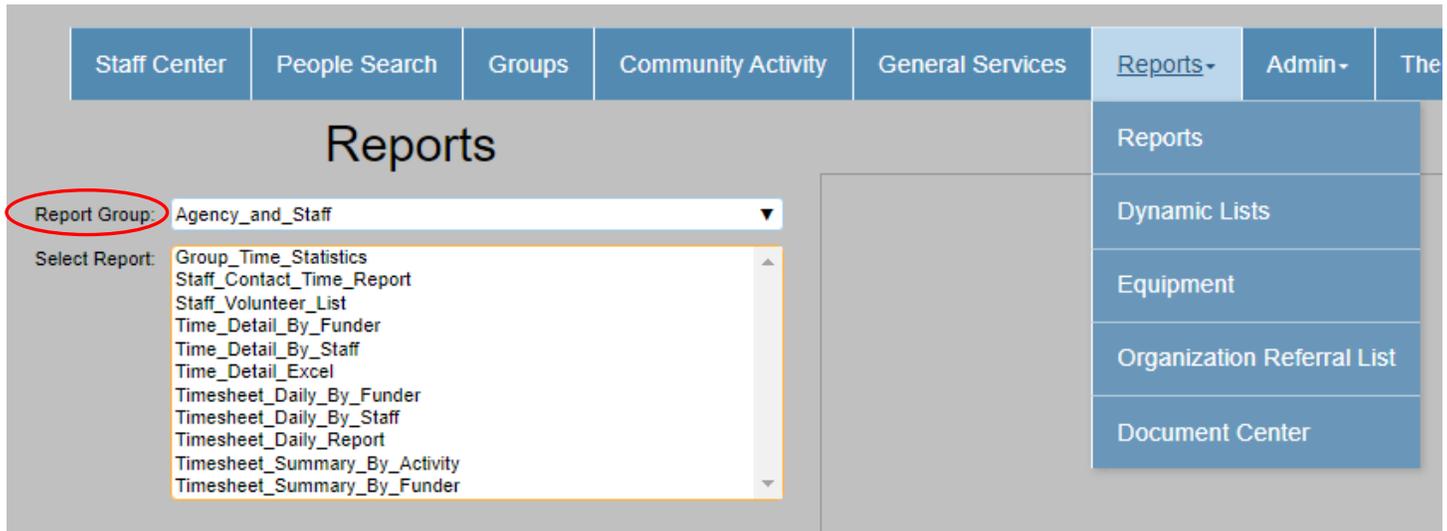
Starting Date:

Ending Date:

General Services					
Date	Service Type	Staff	Office/Unit	Funder	Hours
02/14/2024	Resource Development	MiCIL Support	The CIL	ADRC	8.05
02/14/2024	AT Device Resource Coord.	MiCIL Support	The CIL	Billable Waivered/SILS	0
02/14/2024	Benefits Coordination	MiCIL Support	The CIL	Billable Waivered/SILS	0.7...
08/11/2022	Volunteer Coordination	MiCIL Support	The CIL	ADRC	0
08/11/2022	Reader Coordination	MiCIL Support	The CIL	Covid Cares Act	0.1...
06/01/2022	Training Volunteers/Staff	MiCIL Support	The CIL	SHIP	1
03/01/2021	AT Device Resource Coord.	MiCIL Support	The CIL	Covid Cares Act	2

Reports Menu: Use this to access:

- MiCIL Reports
- Dynamic Lists: Data interface to create, sort and Save queries that can be exported to Excel.
- Equipment: Loan closet data for equipment
- Organization Referral List
- Document Center: A secure area to store agency-wide documents.



Select Reports to access the MiCIL Reporting system.

Reports are organized first in “Report Group” folders, after selecting a Report Group you will get a list of available reports in the box below.

Report Groups:

- Agency and Staff Reports (Staff Time Data)
- Community/Outreach Reports (Community Activity Data and ,Statistics)
- Consumer Contacts and Groups (Consumer Service Notes and Groups)
- Consumer Goals (Consumer Goal Data and Statistics)
- Consumers (Consumer name lists and data check reports)
- Federal Reports (PPR/704, 7OB, and full consumer statistic Reports)
- General Services (Time Statistics not found on PPR/704)
- IR Callers (I&R data lists and Statistics)
- Mailing Lists (Mailing Avery Label 5260 and Excel Export for Mail Merge)
- State Custom Reports (Variety of custom reports written for select states)

REPORTS (Menu)

Staff Center | People Search | Groups | Community Activity | General Services | **Reports** | Admin | The

Reports

Report Group: Federal_Reports

Select Report:

- 704_PPR
- 704_PPR_Cares_Act_2020
- 704_PPR_CommunityActivity_OneIssue_Version
- 704_PPR_Improved_Access_Names
- 704_PPR_Individual_Services_Excel
- 704_PPR_NameList
- 704_PPR_NameList_Excel
- 70B_County_Statistics
- 70B_Missing_Data
- 70B_Office_Statistics
- 70B_Elderly_Blind
- Consumer_Missing_Data
- Consumer_Statistics
- Monthly_704_PPR_New_Consumers
- State_Report_County_Statistics

Parameters

Start Date: 10/1/2023

End Date: 9/30/2024

Office: x All

Staff: x All

County: x All

Funder: x All

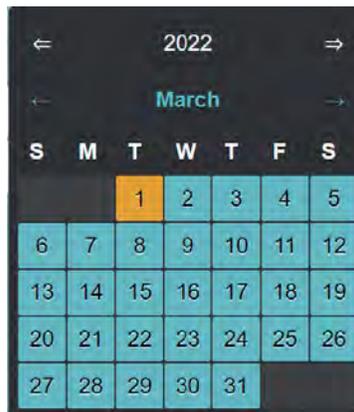
Output: PDF

Generate Report

Use the Report Group field and Select Report from the Report List Box.

When you select a report, you will be offered parameter fields to use to limit your selection. Use the Output dropdown to run the report as a Word or Excel file, PDF is the default. Most require a date range for the reporting period.

Double click on the Date fields to get a calendar to assist in report date range selection.



Introduction: People Search Menu Button -How to enter Information and Referral Calls/Notes

I&R is for: Anytime information is given to either an individual with a disability or to a community member. This includes true for over the phone, email, or in person.

Click **People Search** Button to enter I&R calls/notes.

First! Search to see if the person is already entered into your system.

Always search, do not enter a duplicate person in the system. If you find a duplicate person, put the word “duplicate” in the middle name field and alert your Administrator.

The screenshot shows the 'People Search' section of a web application. At the top, a navigation bar includes 'Staff Center', 'People Search' (circled in red), 'Groups', 'Community Activity', 'General Services', 'Reports', 'Admin', 'Themes', and 'Logout'. Below the navigation bar, the 'People Search' title is followed by three buttons: 'Search', 'Reset Search', and 'Add New Person...' (circled in red). On the left side, there are several search filters: Last Name, First Name, Phone Number, Birthdate, People ID, Organization, SSN, Search All?, and My Consumers. Below these are 'Consumer Quick Filters' (Active 19, Closed 3, Contacts Overdue 8, Missing Data 18) and 'Caller Quick Filters' (Total I&Rs 8, Follow Ups 7, Volunteers 1, Active Volunteers). On the right, a table titled 'Active People' lists individuals with columns for Full Name, Phone, Birth Date, Type, and Person Type. The table contains 15 rows of data, including names like 'feamale, test', 'A, Anonymous Female', 'Aaker, Empty', 'Amann, Sammy', 'Arowsmith, A', 'Benson, Sandra Sanmson', 'Bluma, Dj', 'Braceros, Kristine Mae', 'Brown, Sammy', 'Cox, Kristin', 'daniel, farming', 'Doe, John', 'Grande, Tom Calhoun', 'Ho, Someone', 'Hoffa, Jimmy', 'Jonson, Michelle', and 'Jon Sarah'. At the bottom of the table, it shows 'Page 1 of 41' and 'View 1 - 41 of 100'.

People Search: Before adding a New Person do a I&R/Client search
Use the fields on the right to search by first & last name, phone number or birth date if desired.

- If you find the name, double click it to open the record.
- If you don't find the name, click “**Add New Person...**” button.
- Enter anonymous calls under the “A, Anonymous” name records.

After clicking “Add New Person...” you will select “IR Caller button.

The screenshot shows a dialog box with the title 'Please select IR Caller or Consumer'. Below the title, there is a message: 'Select 'IR Caller' to add new people or 'Consumer' to add a new Consumer Service Intake.' Below this message, there are three numbered instructions: 1. Do not enter a duplicate name. Please search to be sure this person is not already entered in the Name List. 2. Most entries will begin as an 'IR Caller' 3. Adding a Consumer requires an Independent Living Plan and the Consumer's signature on the Rights forms. At the bottom of the dialog box, there are three buttons: 'IR Caller', 'Consumer', and 'Close'.

Select 'IR Caller' button to add **new people** or 'Consumer' to add a new Consumer Service Intake.

1. Most entries will begin as an 'IR Caller'
2. Adding a Consumer requires an Independent Living Plan and the Consumer's signature on the Rights forms.
3. Complete 2 tabs to create the I&R Person/Caller:

Step 1: Complete the **Caller Demographics** Tab with any information you have. It can be common for I&R records to have limited information.

Step 2: Add a "New I&R Call..." This is where you enter the date and note.

Verifying I&R Person information: You are responsible for client files. Minimize errors and duplications by checking **name spelling, use birthdates / phone numbers prior** to entering a new person, (etc.... I&R/Consumer).

- 1. Caller Demographics: Gender, First and Last Name are required to begin saving the new record. Enter these first. If there is no Last Name, you can enter "Z" or "NA" for Not Available.
 - ✓ Contact Phone numbers: Ask for a contact phone number in case you are disconnected from a caller

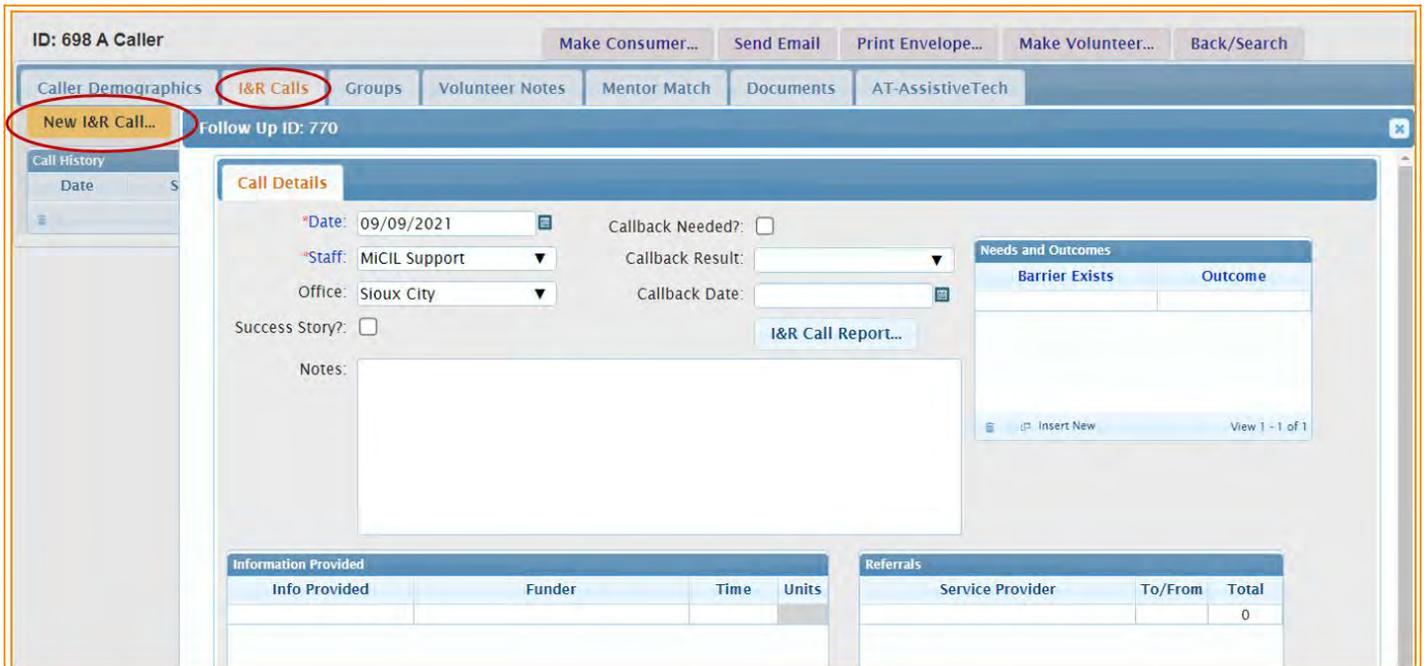
The screenshot shows a web form for a caller. The 'Caller Demographics' tab is selected. The form contains various input fields for personal information, including name, address, contact details, and demographic data. A yellow button at the bottom right is labeled 'Step 2: Add IR Calls- Alt+I' and is circled in red. The 'I&R Calls' tab is also circled in red.

- ✓ Select a disability: if you don't see disability, please select the category the disability fits under.
- ✓ ***Use your internet search to identify these if you are not sure. Email your Administrator with the disability if there is no label to match.**

- Step 2. Click on I&R Calls Tab or Click "Step 2: Add IR Calls" button. Or use Alt+I.
 - Click **New I&R Call...** button to enter the date and note.
Warning: Do not skip this step, you must enter the call date in the New I&R Call screen.

The I&R Call Notes screen will open-

Complete all fields that are applicable: Date, Staff, Office etc.

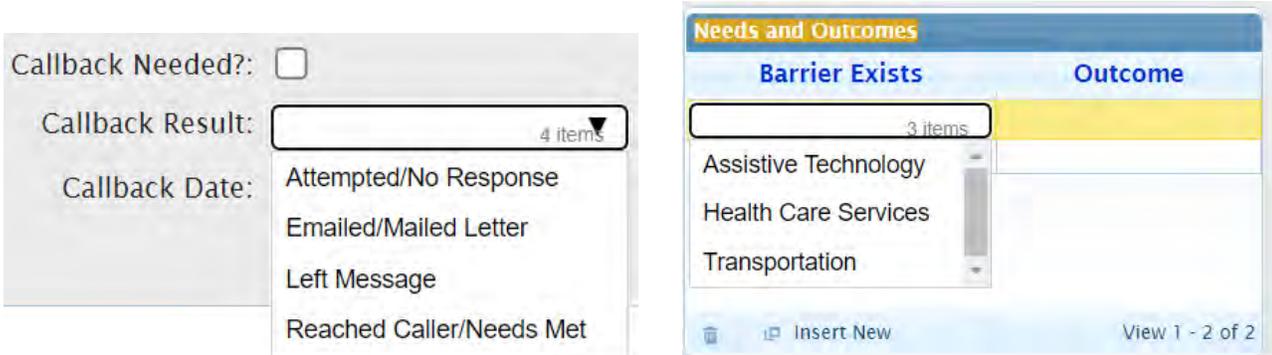


Tips:

“Success Story?” Check box will flag this note as a success story to be retrieved later for use in writing narratives.

“Callback Needed?” Check box will put this record as a reminder on the Staff person’s Staff Center.

Enter the Callback Date when the call is returned and that will remove the callback from Staff Center.



Need and Outcomes- [Used on the Federal PPR report](#) (Increased Access Areas)

Enter If there exists a Need/Barrier and if you improve their access with information or referral enter that in the Outcome box.

Info Provided/Funder/Time

Select info provided related to the caller/client/consumer along with the Funder and Time spent.

Information Provided			
Info Provided	Funder	Time	Units
<input type="text" value="46 items"/>			
Access- Food Insecurity			
Access- Health Care/Insurance			
Access- Housing/Shelter Serv.			
Access- Transportation			
Advocacy Services			
Total (15 min = 1 unit):			0

View 1 - 2 of 2

I & R Call/Note is complete.

Each time you have communication with the same person, you will click "New I&R Call..." button to add more records.

Creating a Client/Consumer from a I&R Caller record:

*From the Demographics or I&R screen, select **Make Consumer...** button

The screenshot shows a navigation bar with tabs: Staff Center, People Search, Groups, Community Activity, General Services, and a partially visible 'R'. Below the navigation bar, the user ID is 'ID: 1 Anonymous A'. To the right of the ID are two buttons: 'Make Consumer...' and 'Send Email'. Below this is a secondary navigation bar with tabs: Demographics (highlighted in orange), I&R Calls, Groups, and Documents. The main content area shows a form with the following fields:

- Salutation: [Dropdown menu with 14 items]
- *Gender: Male [Dropdown menu]
- *First Name: Captain [Text input]
- Middle: Male [Text input]
- *Last Name: Dr. [Text input]
- Suffix: [Dropdown menu]

Start creating your *(CIF)-Client/Consumer Information File

Complete/Update **Consumer** Demographics:

The screenshot shows the 'Consumer Demographics' form with the following sections and fields:

- Salutation:** [Dropdown menu]
- *Gender:** Female [Dropdown menu]
- *First Name:** a [Text input]
- Middle:** [Text input]
- *Last Name:** v [Text input]
- Suffix:** [Dropdown menu]
- Address:** [Text input]
- Address2:** [Text input]
- City/ST/Zip:** [Dropdown menus]
- Is Homeless?:** [Dropdown menu]
- NO MAILINGS:**
- Email:** [Text input]
- TIN or SSN:** [Text input] **Show** [Button]
- School:** [Dropdown menu]
- Video Relay URL:** [Text input]
- Title:** [Text input]
- Organization:** [Dropdown menu]
- Other Org:** [Text input]
- Other Notes:** [Text area]
- Learned of Services:** Government or Social Service [Dropdown menu]
- *County:** Butte [Dropdown menu]
- *Race:** Black or African American [Dropdown menu]
- *Birthdate:** 03/18/1981 [Text input]
- Age:** 41 [Text input]
- Estimated Age:** [Text input]
- Estimate Birthdate:** [Button]
- Marital Status:** Single [Dropdown menu]
- Communication Preference:** [Dropdown menu]
- Registered to Vote?:** Yes [Dropdown menu]
- Is Veteran?:** **Status:** [Dropdown menu]
- Risk of Institutional Placement?:**
- Last Eye Exam:** [Text input]
- Visual Impairment Since:** [Text input]
- Primary Visual Impairment Cause:** [Dropdown menu]
- Visual Impairment Level:** [Dropdown menu]

At the bottom, there are two tables:

- Phone Numbers:**

Phone Type	Phone Number	Primary	Comments
		<input type="checkbox"/>	
- Disabilities:**

Disability	Primary
	<input type="checkbox"/>

On the right side, there are two yellow buttons: 'Step 2: Consumer Service Intake Alt-R' and 'I&R Calls Alt-I'.

Complete Asterix (*) areas required as a Client/Consumer:

Gender, First Name, Last Name, County, Race & Birthdate

This screenshot highlights the required fields (marked with an asterisk) from the 'Consumer Demographics' form:

- *Gender:** Female [Dropdown menu]
- *First Name:** a [Text input]
- *Last Name:** v [Text input]
- *County:** Butte [Dropdown menu]
- *Race:** Black or African American [Dropdown menu]
- *Birthdate:** 03/18/1981 [Text input]

Homeless Count: Select (yes/no):

Is Homeless?: 3 items
Email: Yes
TIN or SSN: No
School: Unknown

Phone type *(contact phone number):

Phone Type: 8 items
Cell Phone
Emergency Contact
Fax
Home
Other
Pager

Select a Disability:

Disabilities: 96 items
Disability: (PTSD) Post Traumatic Stress Disorder
Alzheimer's Disease
Amputation
Anxiety Disorder
Arthritis

Learned of Services: Select what applies:

Learned of Services: 9 items
Government or Social Service Agency
Independent Living Center
Nursing Home/Long Term Care Facility
Online
PG&E

Step 2: Click [New Consumer Service intake...](#) button

Consumer Demographics | **Consumer Service Intake** | I&R Calls | Groups | Application Referral | Volunteer Not

[New Consumer Service Intake...](#) | [About Creating a Consumer Service Request...](#)

Case ID	Start Date	Status	IL Plan	Office	Exit Date	Exit Reason	Details
5	07/27/2007	Pl...	10/21/2007

Enter Intake information:

ID: 22341 a v Life Situations - PPR

Intake Information | Services/Notes | Goals-IL Plan | Groups | Financial Inform

*Start Date: 03/28/2022

Office: Chico

IL Plan:

IL Plan Copy Given to Consumer:

Rights Signature Received?:

Rights Date:

Case ID: 0

Exit Information

Exit Date:

Reason:

70B Exit Survey

Case is Active?: About Closing...

Consumer Staff/Funding				
Funding/Program	Staff Assigned	Start Date	End Date	Confidential
				<input type="checkbox"/>

Select Funding: / Select appropriate responsible Staff: This consumer will then show on the selected staff's Staff Center List.

Enter Service Notes and set Contact Reminder Level:

ID: 1244235981 DJ Bluma [0] Life Situations - PPR | Overview Notes | Print Profile/E-Sign | View Address Info...

Intake Information | **Services/Notes** | Employment Placement | Goals-IL Plan | Groups | Financial Information | Documents | I&R Calls

Set contact reminder to: 90 Days Anticipated Duration of Program: Print Notes... New Notes...

Consumer Contacts / Service Note		Note	Service Topics	Succe Story	Time (hour)
08/13/2024	MiCIL Support			<input type="checkbox"/>	0
06/23/2024	MiCIL Support			<input type="checkbox"/>	0
05/07/2024	MiCIL Support	nichelle@micil.com www.micil.com 808-373-3796		<input type="checkbox"/>	0
05/07/2024	MiCIL Support	ite screen	Com munication	<input type="checkbox"/>	0.5
04/24/2024	MiCIL Support	xperiences a significant impairment/disability is eligible for Independent Living habilitation Act Amendment defines this as an individual who - (1) Has a physical,	Advocacy Services, ADA Employment, Comm munication, Peer	<input type="checkbox"/>	

Create your service notes:

Living Situations ✕

	At Intake	At Change or improved access
Assistive Technology:	<input type="text"/>	<input type="text" value="3 items"/>
Health Care Services:	<input type="text"/>	Achieved Access
Transportation:	<input type="text"/>	Needs Access
Education:	<input type="text"/>	None Available
Residence Type:	<input type="text"/>	<input type="text"/>
Living Arrangement:	<input type="text"/>	<input type="text"/>
Living Accessibility:	<input type="text"/>	<input type="text"/>
Employment:	<input type="text"/>	<input type="text"/>
Annual Income:	<input type="text"/>	<input type="text"/>
Subsidy:	<input type="text"/>	<input type="text"/>

Items in Blue needed on PPR/704 Report
 Items in Red needed for 7-OB Report

Close

Attach Services/Notes to a Goal once complete:

Service Note | **Goals**

Selected Goal:

Consumer Goals	
Date Set	Goal Type
Page 1 of 0	

Attach Note To Goal

Creating Goals/IL Plan:

The screenshot shows a software interface for managing goals. At the top, there are navigation tabs: 'Intake Information', 'Services/Notes', 'Goals-IL Plan' (which is highlighted), 'Groups', 'Financial Information', 'Documents', and 'I&R C'. Below the tabs, there is a section for 'IL Plan' with a dropdown menu, a checkbox labeled 'ILP Copy Given to Consumer?', and two buttons: 'New Goal...' and 'Print IL Plan...'. A summary bar below this section displays statistics: 'Goals Set: 0', 'Goals Achieved: 0', 'Goals Dropped: 0', 'Goals Ongoing: 0', and 'Total Goals: 0'. The main area is titled 'Consumer Goals' and contains a table with columns for 'Date Set', 'Goal Type', and 'Note'. At the bottom of the table, there is a pagination control showing 'Page 1 of 0'.

This screen shows all of the goals entered to date.

To add a New Goal - click on the – **New Goal** – button.
(work with the consumer to determine what their goals and needs are).

To print the Independent Living Plan Click on – **Print IL Plan** – button.

To view detailed information for any of the goals listed, double click on the entries.

When the goal has been achieved, enter the outcome and outcome date and it will show here. The IL Plan: Accepted or Waived needs to be filled in and is required for the 704 Report.

Select **New Goal**:

Enter the date the consumer and you discussed. Then, – choose the Goal Category (drop down list) – enter Staff member working with this consumer – Goal Type (drop down list) if there is not a goal that fits, enter the Type: “Other” and then write what the consumer has told you that he/she hopes to accomplish, in the “Goal Note” section.

Enter the Action Steps that the consumer, with your input and guidance, have agreed are needed to meet the goal.

*(Note you may customize specific Action Steps for the Goals in the Administration area)

When the goal is achieved – enter the Goal Outcome and Outcome Date. They are required for the 704 Report.

The **Living Situations** button is here to allow easy updating of the Situations.

The **Print IL Plan** in Goal Screen will print a summary of this Goal record.

ID: 22341 a v Consumer Goals

*Date Set: Outcome Date:

*Goal Category: Goal Outcome:

Staff: Last Review Date:

*Goal Type:

Consumer's Goal/Need:

IL Plan Steps/To Do List					
Step	Action Description	Person Responsible	Start Date	Target Date	Completed
1			03/28/2022		

Notes/Services Attached to this Goal

Date	Staff	Note	Success Story

Page 1 of 0 No records to view

This is the section where you will create your goal and ILP. You will add in:
 (IL Plan steps/To Do List) = This is a responsibility agreement that includes Staff and Clients duties necessary to complete set goal(s).

IL Plan Steps/To Do List					
Step	Action Description	Person Responsible	Start Date	Target Date	Completed
1			03/28/2022		

View 1 - 1 of 1

Note/Services Attached to a specific goal will be noted in the last box of Consumer Goals:
 (Notes/Services Attached to this Goal)

Notes/Services Attached to this Goal			
Date	Staff	Note	Success Story

Page 1 of 0 No records to view

Closing a Goal:

This is an example of a completed goal. The Print IL Plan button prints just the goal on the screen.

ID: 24380 Nimat Abdullah [(832) 884-0959] Consumer Goals ID: 22539

*Date Set: 06/06/2014 Outcome Date: 06/06/2014
*Goal Category: Community/Social Participation Goal Outcome: Achieved
Staff: Anabel Rios Last Review Date:
*Goal Type: Participate in sports/recreational activities with peers.
Consumer's Goal/Need: Consumer will continue participating in social recreational activities.

Add Goal Note/Services **Add Steps** **Life Situations - PPR** **Print IL Plan...**

Step	Action Description	Person Responsible	Start Date	Target Date	Completed
1	Consumer will continue participating in the Women on the Move.	Consumer	06/06/2014	09/06/2014	06/06/2014
2			06/06/2014		

Notes/Services Attached to this Goal

Date	Staff	Note	Success Story

Page 1 of 0 No records to view

Close

Download Report

Select Report: Independent Living Plan

Case ID: 5794 Parameters
Goal ID: 22539
Output: PDF

Generate Report

Close

Upload Report

Verbal Consent
 Use machine generated signature

Save Reset

Independent Living Plan Report Date: 04-25-2022

Consumer: Nimat Abdullah Case ID: 5794
Anticipated Program Services Duration: 5+ Years **ILP Developed: Accepted**
Planned Frequency of Consumer Contact: 90 Days **ILP Copy given to Consumer: ■**

Date Defined: 6/6/2014 Staff: Anabel Rios Outcome: Achieved
Category: Community/Social Participation Review Date: Outcome Date: 6/6/2014
Goal: Participate in sports/recreational activities with peers.
Notes: Consumer will continue participating in social recreational activities.

Action Desc.	Person Resp	Start Date	Target Date	Completed
Consumer will continue participating in the Women on the Move.	Consumer	6/6/2014	9/6/2014	6/6/2014

* If Consumer waived the IL Plan, signature is not required.

Consumer Signature* Date
Staff Signature Date
Supervisor Signature (if required) Date

Print IL Plan button (IL Plan Report):

Print an IL Plan:

Intake Information Services/Notes **Goals-IL Plan** Groups Financial Information Documents I&R Calls

IL Plan: Accepted ILP Copy Given to Consumer? **New Goal...** **Print IL Plan...**

Goals Set: 0 Goals Achieved: 6 Goals Dropped: 0 Goals Ongoing: 0 Total Goals: 6

Date Set	Goal Type	Note	Outcome	Outcome Date	Staff Person
06/06/2014	Participate in sports/recreational activities with peers.	Consumer will continue participating in social recreational activities.	Achieved	06/06/2014	Anabel Rios
06/06/2014	Acquire supportive services to maintain schedule.	Develop computer skills using Dragon Naturally Speaking.	Achieved	09/28/2015	Anabel Rios
06/06/2014	Acquire/maintain volunteer work.	Consumer wants to participate in volunteer activities.	Achieved	09/03/2016	Anabel Rios
06/06/2014	Acquire self-care or home management aids/equipment.	Consumer wants to access a computer to use at home.	Achieved	11/17/2014	Anabel Rios
06/06/2014	Establish and follow personal exercise needs and routines.	Consumer wants to join an exercise program.	Achieved	09/30/2016	Anabel Rios
06/06/2014	Acquire training in particular skill or interest area.	Consumer wants to improve her Spanish.	Achieved	09/28/2015	Anabel Rios

Page 1 of 1 View 1 - 6 of 6

Download Report

Select Report: Independent Living Plan Parameters

Case ID: 5794

Output: PDF

Generate Report

Close

Upload Report

Verbal Consent

Use machine generated signature

Save Reset

Independent Living Plan Report Date: 04-25-2022

Consumer: Nimat Abdullah Case ID: 5794
 Anticipated Program Services Duration: 5+ Years ILP Developed: Accepted
 Planned Frequency of Consumer Contact: 90 Days ILP Copy given to Consumer:

Date Defined: 6/6/2014 Staff: Anabel Rios Outcome: Achieved
 Category: Community/Social Participation Review Date: Outcome Date: 6/6/2014
 Goal: Participate in sports/recreational activities with peers.
 Notes: Consumer will continue participating in social recreational activities.

Action Desc	Person Resp	Start Date	Target Date	Completed
Consumer will continue participating in the Women on the Move.	Consumer	6/6/2014	9/6/2014	6/6/2014

Date Defined: 6/6/2014 Staff: Anabel Rios Outcome: Achieved
 Category: Educational Review Date: Outcome Date: 9/28/2015
 Goal: Acquire supportive services to maintain schedule.
 Notes: Develop computer skills using Dragon Naturally Speaking.

Action Desc	Person Resp	Start Date	Target Date	Completed
Consumer will register for computer skills.	Consumer	6/6/2014	9/6/2014	9/28/2015

Date Defined: 6/6/2014 Staff: Anabel Rios Outcome: Achieved
 Category: Vocational Review Date: Outcome Date: 9/3/2016
 Goal: Acquire/maintain volunteer work.
 Notes: Consumer wants to participate in volunteer activities.

Action Desc	Person Resp	Start Date	Target Date	Completed
Consumer will participate in volunteer activities at HCL.	Consumer	6/6/2014	9/6/2014	9/30/2016

Date Defined: 6/6/2014 Staff: Anabel Rios Outcome: Achieved
 Category: Information Access/Technology Review Date: Outcome Date: 11/17/2014
 Goal: Acquire self-care or home management aids/equipment.
 Notes: Consumer wants to access a computer in use at home.

Prints a summary of all Goals entered. Signature lines are at the end of the report.

A Consumer signature is required unless they signed the IL Waiver.

To print this, click on the Print Icon on the menu and click on print.

Print



Destination

Content to print

All pages

Active page

Pages:

Cancel

PRINT

Services/Notes Screen

Date	Staff	Note	Success Story	Time (min)	Units
02/28/2017	Anabel Rios	In response to letter sent previously in an attempt to make contact with consumer. There was no response to letter sent to consumer at the beginning of the month. CSR will be placed in inactive status as of today due to no reciprocal contact from consumer. All goals will be considered met. Staffing form will be completed.	<input type="checkbox"/>	30	2
02/01/2017	Anabel Rios	One-Year Anniversary form was completed during was completed for consumer. CSR was reviewed and determined that after no reciprocal contact from consumer. One Year Anniversary Letter and/or inactive letter will be sent to consumer. Consumer will be placed inactive status by the end of the month if no response to letter.	<input type="checkbox"/>	30	2
01/13/2017	Anabel Rios	Consumer was mailed a year end letter from HCIL stating that we wished them a Happy Holiday season. HCIL requested the consumer to contact us in February and/or March for an appointment to discuss their current ILP and/or goals and their new year goals whatever they are. We also stated that HCIL stands ready to assist and work with them. The HCIL letter encouraged the consumer to be ready to renew their systems advocacy efforts in 2017 because the disability community could be facing additional challenges in overcoming the many barriers we already face.	<input type="checkbox"/>	30	2
12/28/2016	Anabel Rios	Consumer was contacted by Community Integration Specialist to touch base on their progress through the year and discuss future goals for 2017. Additionally consumer was also contacted to discuss updates and activities for January 2017 and future months. Consumer has not responded to previous attempts to contact consumer. A letter will be sent to consumer in an attempt to establish contact with consumer.	<input type="checkbox"/>	30	2
09/30/2016	Anabel Rios	All consumer goals were met for FY16 as of September 30, 2016. Consumer will be contacted effective FY 17 to update goal plan and work on established new and/or ongoing goals.	<input type="checkbox"/>	30	2
08/05/2016	Anabel Rios	Consumer was contacted to obtaining a follow-up on their current situation and progress in achieving established goals. All numbers listed on file or out of services. She will be sent an e-mail in an attempt to re-establish contact.	<input type="checkbox"/>	30	2
05/06/2016	Anabel Rios	Consumer was contacted by HCIL and invited to attend an Overview on the Affordable Health Act/Marketplace on Tuesday, May 10, 2016 from 1:00-2:00 p. m. After the overview, Susan Johnson, Diabetes Education Counselor with Kelsey-Seybold will also give a 30 minute presentation on diabetes prevention and care. Consumer is unable to attend due other responsibilities. She also requested resources and information on psychiatric doctors that would take her insurance. She was given several resources.	<input type="checkbox"/>	120	8
04/25/2016	Anabel Rios	Consumer was contacted by volunteer and invited to attend Women on the Move meeting on Thursday April 28, 2016 from 1pm-3pm. The topic will focus on fitness and nutrition. Billy Reese with City of Houston will be here to offer tips and recommendations on exercising and healthy eating for people with disabilities. A message was left for consumer to inform them about the meeting. Ms. Abdullah reported an incident that she experienced last week while trying to access services through Methodist Hospital. She stated that she went to the ER to access emergency attention. She was not feeling well and experienced a mental breakdown. She claims that the staff would not allow her to leave.	<input type="checkbox"/>	60	4

Consumer Contacts are for keeping an up-to-date record of meetings, calls, correspondence, or any other interactions with, or on behalf of a consumer. Contact entry is required for the 704 Report,

Click on the New Notes button – to record a Consumer Contact.

To view prior contacts – Double click on the Services/Notes entry.

The Print Notes – button is a report that will compile all (or part) of all contacts made with this Consumer according to your date selection. The following 2 pages will demonstrate.

TIP: You may want to review the date range you need on this screen before clicking “Print Contacts.”

Print Notes

When you click on the Print Notes button this is the screen that comes up. You need to put in the Beginning Date and the Ending Date and click Generate Report.

You will have the option to print a Detailed or a Summary report.

The screenshot shows the 'Download Report' interface. On the left, there are options to select a report type ('Consumer_Contact_Summary_By_Staff' or 'Consumer_Contact_Details_By_Staff'), set parameters (Case ID, Start Date, End Date, Staff), and choose an output format (PDF). There are buttons for 'Generate Report', 'Close', and 'Upload Report'. Below these are checkboxes for 'Verbal Consent' and 'Use machine generated signature', and 'Save' and 'Reset' buttons.

The right side shows a preview of the 'Consumer Contact Summary by Staff' report. The report title is 'Consumer Contact Summary by Staff' with a report date of '04-25-2022'. The date range is '2/1/1900 through 1/31/2201' and the staff is 'Nimat Abdullah'. The report contains a table with the following columns: Staff Name, Contact Date, Service Type, Units, Hours, and Funder.

Staff Name	Contact Date	Service Type	Units	Hours	Funder
Anabel Rios	2/28/2017	Peer Counseling	2	0.50	HCII/ACL-HHS
	2/1/2017	Peer Counseling	2	0.50	HCII/ACL-HHS
	1/13/2017	Advocacy/Legal Services	1	0.25	HCII/ACL-HHS
	1/13/2017	Peer Counseling	1	0.25	HCII/ACL-HHS
	12/28/2016	Peer Counseling	2	0.50	HCII/ACL-HHS
	9/30/2016	Advocacy/Legal Services	2	0.50	HCII/ACL-HHS
	8/5/2016	Peer Counseling	2	0.50	HCII/ACL-HHS
	5/6/2016	IL Skills Training	2	0.50	HCII/ACL-HHS
	5/6/2016	Information & Referral Services	2	0.50	HCII/ACL-HHS
	5/6/2016	Peer Counseling	2	0.50	HCII/ACL-HHS
	5/6/2016	Preventive Services	2	0.50	HCII/ACL-HHS
	4/25/2016	Peer Counseling	2	0.50	HCII/ACL-HHS
	4/25/2016	Recreational Services	2	0.50	HCII/ACL-HHS
	3/30/2016	Advocacy/Legal Services	2	0.50	HCII/ACL-HHS
	3/30/2016	Information & Referral Services	2	0.50	HCII/ACL-HHS
	3/30/2016	Peer Counseling	2	0.50	HCII/ACL-HHS
	3/30/2016	Preventive Services	2	0.50	HCII/ACL-HHS
	3/22/2016	Housing	2	0.50	HCII/ACL-HHS
	3/22/2016	IL Skills Training	2	0.50	HCII/ACL-HHS
	3/22/2016	Information & Referral Services	2	0.50	HCII/ACL-HHS
	3/22/2016	Peer Counseling	2	0.50	HCII/ACL-HHS
	3/15/2016	Advocacy/Legal Services	2	0.50	HCII/ACL-HHS
	3/15/2016	Information & Referral Services	2	0.50	HCII/ACL-HHS
	3/15/2016	Peer Counseling	2	0.50	HCII/ACL-HHS

Print Notes Report

This screenshot is identical to the previous one, but the Print icon in the browser toolbar is circled in red, indicating the action to be taken to print the report.

This is what the actual report looks like – you would click on Print Icon and it would print the full report. As you can see, this pulls all of the information that you put in under the Notes.

Contact Information – (after double clicking on the entry)

Service Note **Goals**

Date: 02/28/2017 Staff: Anabel Rios Success Story?:

Notes:
In response to letter sent previously in an attempt to make contact with consumer. There was no response to letter sent to consumer at the beginning of the month. CSR will be placed in inactive status as of today due to no reciprocal contact from consumer. All goals will be considered met. Staffing form will be completed.

Service Topics are required for the Federal report

Service Topics	Staff Time and Funder	Service Referrals												
Services Provided Topics Peer Counseling	<table border="1"><thead><tr><th>Note Type</th><th>Funder/Program</th><th>Time</th><th>Units</th></tr></thead><tbody><tr><td>Peer Counseling</td><td>HCIL/ACL-HHS</td><td>30</td><td>2</td></tr><tr><td colspan="2">Total (15 min = 1 unit):</td><td>30</td><td>2</td></tr></tbody></table>	Note Type	Funder/Program	Time	Units	Peer Counseling	HCIL/ACL-HHS	30	2	Total (15 min = 1 unit):		30	2	Provider
Note Type	Funder/Program	Time	Units											
Peer Counseling	HCIL/ACL-HHS	30	2											
Total (15 min = 1 unit):		30	2											

Print Notes... Life Situations - PPR

Close

Complete the first part of the record. Units are 1 Unit for 15 minutes of time.

TIP: The first contact entries are typically Intake and Assessment.

Remember to always enter a Service note when you update or work on the Consumer's file. For example, if you close a Consumer file, you will enter a Service note to go with the closing date.

Contact Information - Topics and Referrals

Service Topics are required for the Federal report

Service Topics	Staff Time and Funder	Service Referrals												
Services Provided Topics Peer Counseling	<table border="1"><thead><tr><th>Note Type</th><th>Funder/Program</th><th>Time</th><th>Units</th></tr></thead><tbody><tr><td>Peer Counseling</td><td>HCIL/ACL-HHS</td><td>30</td><td>2</td></tr><tr><td colspan="2">Total (15 min = 1 unit):</td><td>30</td><td>2</td></tr></tbody></table>	Note Type	Funder/Program	Time	Units	Peer Counseling	HCIL/ACL-HHS	30	2	Total (15 min = 1 unit):		30	2	Provider
Note Type	Funder/Program	Time	Units											
Peer Counseling	HCIL/ACL-HHS	30	2											
Total (15 min = 1 unit):		30	2											

Print Notes... Life Situations - PPR

Close

Be sure to select all Service Topics that apply as are required for the 704 Report.

Note, whatever topic you put here should be discussed in the "Notes" section. At least one Contact record is needed for the 704 reporting year with all the Service Topics entered. Be specific, more is better.

Referrals to Agency Type area: track if you refer a consumer to another agency for services.

Note: Topics are only counted once for the 704 – so if several contacts are made under the same topic – say Transportation, and there are 10 contacts with the consumer in this area– it will be counted one time only.

Contact Information – Notes

ID: 24380 Nimat Abdullah [(832) 884-0959] Contact Detail ID: 83329

Service Note Goals

Date: 02/28/2017 Staff: Anabel Rios Success Story?:

Notes:

In response to letter sent previously in an attempt to make contact with consumer. There was no response to letter sent to consumer at the beginning of the month. CSR will be placed in inactive status as of today due to no reciprocal contact from consumer. All goals will be considered met. Staffing form will be completed.

Service Topics are required for the Federal report

Service Topics	Staff Time and Funder	Service Referrals															
<table border="1"><thead><tr><th>Services Provided Topics</th></tr></thead><tbody><tr><td>Peer Counseling</td></tr></tbody></table>	Services Provided Topics	Peer Counseling	<table border="1"><thead><tr><th>Note Type</th><th>Funder/Program</th><th>Time</th><th>Units</th></tr></thead><tbody><tr><td>Peer Counseling</td><td>HCIL/ACL-HHS</td><td>30</td><td>2</td></tr><tr><td colspan="2">Total (15 min = 1 unit):</td><td>30</td><td>2</td></tr></tbody></table>	Note Type	Funder/Program	Time	Units	Peer Counseling	HCIL/ACL-HHS	30	2	Total (15 min = 1 unit):		30	2	<table border="1"><thead><tr><th>Provider</th></tr></thead><tbody></tbody></table>	Provider
Services Provided Topics																	
Peer Counseling																	
Note Type	Funder/Program	Time	Units														
Peer Counseling	HCIL/ACL-HHS	30	2														
Total (15 min = 1 unit):		30	2														
Provider																	

Print Notes... Life Situations - PPR

Close

Enter a summary of what took place as a result of your interactions with this consumer.

Enter your Staff notes.

Close the screen when done.

Staff Center (Active Case List) Screen

Staff Center Note: Items in blue are required for Federal Reporting

Consumer Survey | Print Consumer List | Daily Time Check | How To Add Consumer to List

Staff: Anabel Rios | Show Closed Consumers: | Consumer: | Search

Consumer	Last Contact	Next Contact	Intake Date	IL Plan	Phone Number	Add Contact/Note	Send Email	Address
Abrar, Nadia	04/21/2022	86 day(s)	01/29/2020	Accepted	(832) 533-0004	New Note	Send Email	Address...
Akpa, Chima	02/09/2022	15 day(s)	12/06/2007	Accepted	(832) 721-7214	New Note	Send Email	Address...
Akway, Olango	04/21/2022	86 day(s)	05/14/2012	Accepted	(832) 890-5748	New Note	Send Email	Address...
Amlima, Kossi	04/21/2022	86 day(s)	01/08/2014	Accepted	(773) 676-3259	New Note	Send Email	Address...
Andrews, Kimberly	04/21/2022	86 day(s)	05/13/2019	Accepted	(832) 792-6525	New Note	Send Email	Address...
Barrera, Ramiro	03/30/2022	64 day(s)	10/18/2016	Accepted	(832) 603-7545	New Note	Send Email	Address...
Bell, Jeanette	04/21/2022	86 day(s)	01/29/2019	Accepted	(832) 967-3609	New Note	Send Email	Address...
Benitez, Macario	04/21/2022	86 day(s)	05/07/2019	Accepted	(713) 380-2729	New Note	Send Email	Address...
Biddle, Walter	04/19/2022	84 day(s)	03/01/2019	Accepted	(832) 259-1406	New Note	Send Email	Address...
Bisch, Vickie	01/25/2022	0 day(s)	11/05/2020	Accepted	(832) 298-4856	New Note	Send Email	Address...
Blasini, Christina	01/25/2022	0 day(s)	09/02/2014	Accepted	(346) 978-3230	New Note	Send Email	Address...
Blount, Glennelle	01/25/2022	0 day(s)	02/10/2020	Accepted	(281) 901-2705	New Note	Send Email	Address...
Boatman, Carri	01/25/2022	0 day(s)	11/03/2020	Accepted	(832) 578-4519	New Note	Send Email	Address...
Broomfield, Glenda	01/25/2022	0 day(s)	06/06/2019	Accepted	(281) 988-8972	New Note	Send Email	Address...
Brown, Heather	01/25/2022	0 day(s)	05/21/2019	Accepted	(346) 360-2130	New Note	Send Email	Address...
Brumbaugh, Iris	03/30/2022	64 day(s)	02/20/2007	Accepted	(713) 562-7682	New Note	Send Email	Address...
Bush, Chiquita	01/25/2022	0 day(s)	10/28/2021	Accepted	(713) 609-7759	New Note	Send Email	Address...

Caller	Call Date	Phone Number	Follow Up	Address
No records to view				

Page 1 of 2 | View 1 - 100 of 198

Note: If a screen freezes, press "CTRL KEY" AND F5 to reset
Version: 03.12

When you work with consumers every day, use this screen by double clicking the consumer's name in the list. From here you will have quick access to entering Goals, Contact Notes and updating Consumer/Service Request information for all the active Consumers that you are working with.

The Next Contact column will note if a contact is due according to the Planned Frequency of Contact that was entered on the Goal tab in the Service Request screen.

Closing Out A Consumer Request

Intake Information | Services/Notes | Goals-IL Plan | Groups | Financial Information | Documents | I&R Calls

*Start Date: 06/05/2014
Office: HCIL
IL Plan: Accepted
IL Plan Copy Given to Consumer:
Rights Signature Received?:
Rights Date: 06/05/2014
Case ID: 5794

Exit Information
Exit Date: 02/28/2017
Reason: Goals Met
70B Exit Survey
Case is Active?: **About Closing...**

File Comments or Eligibility Statement:
Old Address ID: 25129 Old Case ID: 8134

Consumer Staff/Funding

Funding/Program	Staff Assigned	Start Date	End Date	Confidential
HCIL/ACL-HHS	Anabel Rios	06/05/2014	02/28/2017	<input checked="" type="checkbox"/>

SS Benefits

SS Office	Verified w/BPQY	BPQY Date	Dependant On Record	Confirm Letter Sent	Medical Review Date	Month Of TWP Used To Date	Month Of Cessation	EPE Start Date	EPE End Date	TWP Start Date	TWP End Date
-----------	-----------------	-----------	---------------------	---------------------	---------------------	---------------------------	--------------------	----------------	--------------	----------------	--------------

Step 4: Service Notes Alt-C
Step 5: Goals Alt-G

A Consumer should only have one Active Service request at a time. However, you can have many goals under that one request and many entries for different Programs and Staff. The Active Service Request will stay opened until all the goals have been achieved or dropped.

The next example is of a Consumer – that was opened, worked with and then closed. If this Consumer should call with another Request for Services – say training instead of equipment – then we would open a new Request for Service – with new Goals and Contacts, etc.

Consumer – Closing A Request For Service

First enter the Exit information in the section on this screen.

Intake Information Services/Notes Goals-IL Plan Groups Financial Information Documents I&R Calls

Start Date: 06/05/2014
 Office: HCIL
 IL Plan: Accepted
 IL Plan Copy Given to Consumer:
 Rights Signature Received?:
 Rights Date: 06/05/2014
 Case ID: 5794

Exit Information
 Exit Date: 02/28/2017
 Reason: Goals Met
 70B Exit Survey
 Case is Active?: About Closing...

File Comments or Eligibility Statement:
 Old Address ID: 25129 Old Case ID: 8134

Step 4: Service Notes Alt-C
 Step 5: Goals Alt-G

Funding/Program	Staff Assigned	Start Date	End Date	Confidential
HCIL/ACL-HHS	Anabel Rios	06/05/2014	02/28/2017	<input type="checkbox"/>

SS Benefits

SS Office	Verified w/BPQY	BPQY Date	Dependant On Record	Confirm Letter Sent	Medical Review Date	Month Of TWP Used To Date	Month Of Cessation	EPE Start Date	EPE End Date	TWP Start Date	TWP End Date
-----------	-----------------	-----------	---------------------	---------------------	---------------------	---------------------------	--------------------	----------------	--------------	----------------	--------------

Next, click on the – Situations – button and fill in the Exit column for all items entered there.

ID: 24380 Nimat Abdullah [(832) 884-0959] Contact Detail ID: 83329

Service Note Goals

Date: 02/28/2017 Staff: Anabel Rios Success Story?:

Notes:
 In response to letter sent previously in an attempt to make contact with consumer. There was no response to letter sent to consumer at the beginning of the month. CSR will be placed in inactive status as of today due to no reciprocal contact from consumer. All goals will be considered met. Staffing form will be completed.

Service Topics are required for the Federal report

Services Provided Topics	Note Type	Funder/Program	Time	Units
Peer Counseling	Peer Counseling	HCIL/ACL-HHS	30	2
Total (15 min = 1 unit):			30	2

Life Situations - PPR

Print Notes... Close

Living Situations ID: 4139

	At Intake	At Change or improved access
Assistive Technology:	Needs Access	Needs Access
Health Care Services:	Achieved Access	Achieved Access
Transportation:	Achieved Access	Achieved Access
Education:	Some College	Some College
Residence Type:	Rent House/Apartment	Rent House/Apartment
Living Arrangement:	Independent	Independent
Living Accessibility:	Accessible	Accessible
Employment:	Not Employed: Not Seeking	Not Employed: Not Seeking
Annual Income:	\$6,601 - \$10,000	\$6,601 - \$10,000
Subsidy:	Unsubsidized	Unsubsidized

Items in Blue needed on PPR/704 Report
 Items in Red needed for 7-OB Report

Close

Next, enter the end date on the Programs Tab

Intake Information | Services/Notes | Goals-IL Plan | Groups | Financial Information | Documents | I&R Calls

Start Date: 06/05/2014
 Office: HCIL
 IL Plan: Accepted
 IL Plan Copy Given to Consumer:
 Rights Signature Received?:
 Rights Date: 06/05/2014
 Case ID: 5794

Exit Information

Exit Date: 02/28/2017
 Reason: Goals Met
 70B Exit Survey
 Case is Active?: **About Closing...**

File Comments or Eligibility Statement:
 Old Address ID: 25129 Old Case ID: 8134

Step 4: Service Notes Alt-C
Step 5: Goals Alt-G

Consumer Staff/Funding				
Funding/Program	Staff Assigned	Start Date	End Date	Confidential
HCIL/ACL-HHS	Anabel Rios	06/05/2014	02/28/2017	<input type="checkbox"/>

Insert New View 1 - 2 of 2

SS Benefits											
SS Office	Verified w/BPOY	BPQY Date	Dependant On Record	Confirm Letter Sent	Medical Review Date	Month Of TWP Used To Date	Month Of Cessation	EPE Start Date	EPE End Date	TWP Start Date	TWP End Date

Insert New View 1 - 1 of 1

Last, Click on the Goals tab and close out all goals listed and enter the Outcome.

IL Plan: Accepted ILP Copy Given to Consumer?: [New Goal...](#) [Print IL Plan...](#)

Goals Set: 0 Goals Achieved: 6 Goals Dropped: 0 Goals Ongoing: 0 Total Goals: 6

Consumer Goals					
Date Set	Goal Type	Note	Outcome	Outcome Date	Staff Person
06/06/2014	Participate in sports/recreational activities with peers.	Consumer will continue participating in social recreational activities.	Achieved	06/06/2014	Anabel Rios
06/06/2014	Acquire supportive services to maintain schedule.	Develop computer skills using Dragon Naturally Speaking.	Achieved	09/28/2015	Anabel Rios
06/06/2014	Acquire/maintain volunteer work.	Consumer wants to participate in volunteer activities.	Achieved	09/03/2016	Anabel Rios
06/06/2014	Acquire self-care or home management aids/equipment.	Consumer wants to access a computer to use at home.	Achieved	11/17/2014	Anabel Rios
06/06/2014	Establish and follow personal exercise needs and routines.	Consumer wants to join an exercise program.	Achieved	09/30/2016	Anabel Rios
06/06/2014	Acquire training in particular skill or interest area.	Consumer wants to improve her Spanish.	Achieved	09/28/2015	Anabel Rios

Group Services Search – Use For Open Consumers Only

Staff Center Callers/Consumers Groups Community Outreach General Services Reports - Admin - Themes - Logout

Group Service Search

Session Name: Staff Name: Anabel Rios
Service Type: Start Date:
Office Name: End Date:

Service Date	Session Name	Service Type	Funder	Office
03/24/2022	WOMEN ON THE MOVE (W.O.M.) CELEBRATES WOMEN'S HISTORY WOMEN WITH DISABILITIES: OUR LIVES...OUR JOURNEY!	Peer Counseling	HCIL/ACL-HHS	HCIL
03/10/2022	Housing Option Peer to Peer Session	Housing	HCIL/ACL-HHS	HCIL
02/24/2022	Relationships/Disability/...	Peer Counseling	HCIL/ACL-HHS	HCIL
02/22/2022	ESPN: Scams! BBB Senior Patrol	Advocacy	HCIL/ACL-HHS	HCIL
02/10/2022	Housing Option Peer to Peer Session	Housing		HCIL
02/03/2022	ASL Introduction	Advocacy	HCIL/ACL-HHS	HCIL
01/27/2022	Should I Open an Able Account	Advocacy	HCIL/ACL-HHS	HCIL
01/27/2022	IL Staffs Meeting	IL Skills Training	HCIL/ACL-HHS	HCIL
	Housing Options Q&A			

Page 1 of 423 View 1 - 100 of 100

This is a directory of all the Group Services that have been entered.

To view one – double click on the entry.

Click New Group Service button to enter a new Group record.

Staff Center Callers/Consumers Groups Community Outreach General Services Reports - Admin - Themes - Logout

Group Service Search

Session Name: Staff Name: Anabel Rios
Service Type: Start Date:
Office Name: End Date:

Service Date	Session Name	Service Type	Funder	Office
03/24/2022	WOMEN ON THE MOVE (W.O.M.) CELEBRATES WOMEN'S HISTORY WOMEN WITH DISABILITIES: OUR LIVES...OUR JOURNEY!	Peer Counseling	HCIL/ACL-HHS	HCIL
03/10/2022	Housing Option Peer to Peer Session	Housing	HCIL/ACL-HHS	HCIL
02/24/2022	Relationships/Disability/...	Peer Counseling	HCIL/ACL-HHS	HCIL
02/22/2022	ESPN: Scams! BBB Senior Patrol	Advocacy	HCIL/ACL-HHS	HCIL
02/10/2022	Housing Option Peer to Peer Session	Housing		HCIL
02/03/2022	ASL Introduction	Advocacy	HCIL/ACL-HHS	HCIL
01/27/2022	Should I Open an Able Account	Advocacy	HCIL/ACL-HHS	HCIL
01/27/2022	IL Staffs Meeting	IL Skills Training	HCIL/ACL-HHS	HCIL
	Housing Options Q&A			

Page 1 of 423 View 1 - 100 of 100

Group Services Main Screen

This is the screen that you enter a new Group Service activity. Be sure that you enter the correct Service Date.

Enter general notes in the Group Notes section.

Group Detail ID: 1141

Group Details And Topics | Staff Time And Attendance

*Service Date: 03/24/2022

*Session Name: WOMEN ON THE MOVE (W.O.M.)

*Office: HCIL

*Service Type: Peer Counseling

Funder: HCIL/ACL-HHS

Fee Per Person (\$): 0.00

County: Harris

Zip Code: 7703 [Find Zip](#)

Service Topics

Service Topic
Advocacy Services
Education/Training
Peer Counseling

Group Note: WOMEN ON THE MOVE (W.O.M.) CELEBRATES WOMEN'S HISTORY
WOMEN WITH DISABILITIES: OUR LIVES...OUR JOURNEY!
Thursday, March 24, 2022, from 1:00 p.m. - 2:00 p.m.

Join Anabel Rios, Community Integration Specialist, as we recognize women with disabilities throughout history for their activism and contributions in society and the community!

Let's cherish one another as women with disabilities and empower each other on our journey!

[Close](#)

Except for the Session Name and Group Notes, everything is a drop down. From here you can go the Staff Time and Attendance.

Group Services Staff Time and Attendance

Group Detail ID: 1141

Group Details And Topics **Staff Time And Attendance**

[Send Group Email](#)

Staff Time					
Staff Name	Mileage	Travel Time	Prep Time	Session Time	Units
Anabel Rios			120	60	1.2
	0		120	Total (15 min = 1 unit)	1.2

[Insert New](#) View 1 - 2 of 2

Attendance		
IR Caller/Consumer	Note	Email

[Insert New](#) View 1 - 1 of 1

[Close](#)

Enter Staff name and amount of time. You can enter in the Hours field for 1 hour or 1.25, or you can enter time in the Units field, whichever you prefer.

Enter all of the consumers names that attended the Group by entering them into the Attendance section at the bottom.

You may also enter Notes specific to the Participant by clicking on the "Notes" field to the right of the Participants name.

Community Outreach Services

Click on Community Outreach Services from the Main Menu:

Here you will see a list of all Community Outreach Activities

Community Outreach Search

Organization: Staff Name: Anabel Rios

Office Name: Start Date:

Outreach Area: End Date:

Outreach Goal: Missing Data:

[Search](#) [Reset Search](#) [New Outreach...](#)

Service Date	Service Name	Organization	Office	Outreach Area Type
04/09/2022	Hand in Hand Transition Fair		HCIL	Outreach Efforts
04/06/2022	Services for Residents Leaving Nursing Facilities through the North Central Texas Area Agency on Aging and Aging and Disability Resource Center	HCIL	HCIL	Community Ed./Public Info.
04/06/2022	Autism Spectrum Disorder: The Diagnostic Journey		HCIL	Community Ed./Public Info.
04/01/2022	Parent Transition Night		HCIL	Outreach Efforts
03/30/2022	Metrolift Community Leader Community		HCIL	Community Ed./Public Info.
03/28/2022	Zoom meeting with Harris Co. Psych. Center	HCIL	HCIL	Outreach Efforts
03/24/2022	Accessibility Help Desk Overview	HCIL	HCIL	Collaborating/Networking
03/23/2022	Southeast Texas Education Forum	HCIL	HCIL	Collaborating/Networking
03/22/2022	ESPN Senior Community Meeting		HCIL	Community Ed./Public Info.
03/22/2022	March FAIR HOUSING Series - Know Your Housing Rights: Eviction Process and How to		HCIL	Community Ed./Public Info.

Page 1 of 291 View 1 - 100 of 100

Double click any Activity in the list to update or view the record

OR

Select the New Outreach button to record a new Activity.

Community Outreach Services New Outreach Button

Staff Center Callers/Consumers Groups Community Outreach General Services Reports - Admin - Themes - Logout

Community Outreach Search

Organization: Staff Name: Anabel Rios
 Office Name: Start Date:
 Outreach Area: End Date:
 Outreach Goal: Missing Data:

Service Date	Service Name	Organization	Office	Outreach Area Type
04/09/2022	Hand in Hand Transition Fair		HCIL	Outreach Efforts
04/06/2022	Services for Residents Leaving Nursing Facilities through the North Central Texas Area Agency on Aging and Aging and Disability Resource Center	HCIL	HCIL	Community Ed./Public Info.
04/06/2022	Autism Spectrum Disorder: The Diagnostic Journey		HCIL	Community Ed./Public Info.
04/01/2022	Parent Transition Night		HCIL	Outreach Efforts
03/30/2022	Metrolift Community Leader Community		HCIL	Community Ed./Public Info.
03/28/2022	Zoom meeting with Harris Co. Psych. Center	HCIL	HCIL	Outreach Efforts
03/24/2022	Accessibility Help Desk Overview	HCIL	HCIL	Collaborating/Networking
03/23/2022	Southeast Texas Education Forum	HCIL	HCIL	Collaborating/Networking
03/22/2022	ESPN Senior Community Meeting		HCIL	Community Ed./Public Info.
03/22/2022	March FAIR HOUSING Series - Know Your Housing Rights: Eviction Process and How to		HCIL	Community Ed./Public Info.

Page 1 of 291 View 1 - 100 of 100

Community Activity – Information Screen

Community Outreach Detail ID: 2835

Community Outreach Attendance / Publicity Documents

Date: 04/09/2022
 Outreach Area: Outreach Efforts
 Activity Name: Hand in Hand Transition Fair
 Activity Type: Transition/Community-Based
 Office: HCIL
 County: Harris
 City: Houma
 Zip Code: 77036

Organization Information
 Org. Name:
 Other Org:
 First Name:
 Last Name:
 Phone:
 Email:
 Testimonial?:

Issues
 Issues
 Youth Transition/Relocation
 View 1 - 2 of 2

Goal Objective: Youth Transition: Outreach to youth with disabilities to present options for high school students transition

Notes: Tomball ISD held a Youth Transition Fair, Hand In Hand for youth and students with disabilities in the district. Over 20 partner agencies partnered in the event, One-Hundred participants joined the event, including students, families, and staff. HCIL outreached and distributed HCIL material throughout the event, Twenty two individuals register to further information, services, and follow-up.

Staff	Office	Funder	Activity Time	Travel Time	Prep Time	Mileage	Units	Notes
Anabel Rios	HCIL	HCIL/ACL-HHS	240	60		0	20	
Toni Poston	HCIL Administrative							
			240	60		0	20	

Items in blue are required for the 704 Report. Community Outreach is for tracking Community meetings and large Outreach Efforts.

Note: For the 704 report, they will require that you only use 1 Issue area. You may enter multiple Issues here, and then when entering your 704 you will select which Issue to use.

Goal Objective: Go to Create Community Goal Objectives to enter a Goal.

Note: Enter a Goal for all Community Outreach Activities: Required for 704 Reporting

FAQ

I don't see my Goal Objective in the drop down list - Check that you haven't marked the Goal "Achieved" or "Dropped".

Community Activity – Attendance/Publicity

Community Outreach Detail ID: 2835

Community Outreach Attendance / Publicity Documents

IR Outreach

Type of IR	Count
	0

Insert New View 1 - 1 of 1

Publicity

Publicity	Delivered
Brochures Distributed	60
Other Mailings or Distribution	60
	0

Insert New View 1 - 3 of 3

Doc Type: Clear Search

Doc Notes:

Close

1 Unit = 15 minutes

Community Activity – Documents

Community Outreach Detail ID: 2835

Community Outreach Attendance / Publicity Documents

Doc Type:

Doc Notes:

Notes	File Name	Doc Type	Upload Date	Description	Select
Insert New					
Page 0 of 1					
No records to view					

Close

Satisfaction Survey

Staff Center Callers/Consumers Groups Community Outreach General Services Reports+ Admin+ Themes- Logout

Staff Center Note: Items in blue are required for Federal Reporting

Consumer Survey [Print Consumer List](#) [Daily Time Check](#) [How To Add Consumer to List](#)

Staff: Anabel Rios Show Closed Consumers: Consumer: Search

Consumer	Last Contact	Next Contact	Intake Date	IL Plan	Phone Number	Add Contact/Note	Send Email	Address
Abrar, Nadia	04/21/2022	86 day(s)	01/29/2020	Accepted	(832) 533-0004	New Note	Send Email	Address...
Akpa, Chima	02/09/2022	15 day(s)	12/06/2007	Accepted	(832) 721-7214	New Note	Send Email	Address...
Akway, Olango	04/21/2022	86 day(s)	05/14/2012	Accepted	(832) 890-5748	New Note	Send Email	Address...
Amlima, Kossi	04/21/2022	86 day(s)	01/08/2014	Accepted	(773) 676-3259	New Note	Send Email	Address...
Andrews, Kimberly	04/21/2022	86 day(s)	05/13/2019	Accepted	(832) 792-6525	New Note	Send Email	Address...
Barrera, Ramiro	03/30/2022	64 day(s)	10/18/2016	Accepted	(832) 603-7545	New Note	Send Email	Address...
Bell, Jeanette	04/21/2022	86 day(s)	01/29/2019	Accepted	(832) 967-3609	New Note	Send Email	Address...
Benitez, Macario	04/21/2022	86 day(s)	05/07/2019	Accepted	(713) 380-2729	New Note	Send Email	Address...
Biddle, Walter	04/19/2022	84 day(s)	03/01/2019	Accepted	(832) 259-1406	New Note	Send Email	Address...
Bisch, Vickie	01/25/2022	0 day(s)	11/05/2020	Accepted	(832) 298-4856	New Note	Send Email	Address...
Blasini, Christina	01/25/2022	0 day(s)	09/02/2014	Accepted	(346) 978-3230	New Note	Send Email	Address...
Blount, Glennelle	01/25/2022	0 day(s)	02/10/2020	Accepted	(281) 901-2705	New Note	Send Email	Address...
Boatman, Carri	01/25/2022	0 day(s)	11/03/2020	Accepted	(832) 578-4519	New Note	Send Email	Address...
Broomfield, Glenda	01/25/2022	0 day(s)	06/06/2019	Accepted	(281) 988-8972	New Note	Send Email	Address...
Brown, Heather	01/25/2022	0 day(s)	05/21/2019	Accepted	(346) 360-2130	New Note	Send Email	Address...
Brumbaugh, Iris	03/30/2022	64 day(s)	02/20/2007	Accepted	(713) 562-7682	New Note	Send Email	Address...
Bush, Chiquita	01/25/2022	0 day(s)	10/28/2021	Accepted	(713) 609-7759	New Note	Send Email	Address...

Page 1 of 2 View 1 - 100 of 198

IR Calls Requiring Follow-Up

Caller	Call Date	Phone Number	Follow Up	Address
Page 1 of 0 No records to view				

Note: If a screen freezes, press "CTRL KEY" AND F5 to reset
Version: 03.12

When you receive a survey back, enter the information they have marked here.

Consumer Survey

Name: Date: Office:

[Services](#) [Feedback Section](#) [Agency Contacts](#)

Feedback Section 1

Consumer Survey

Name: _____ Date: _____ Office: _____

Services Feedback Section Agency Contacts

Most Helpful Services

<input type="checkbox"/> Consumer Rights	<input type="checkbox"/> Health Care/Nutrition
<input type="checkbox"/> Communication	<input type="checkbox"/> Housing
<input type="checkbox"/> Daily Living/Self-Care	<input type="checkbox"/> Mobility
<input type="checkbox"/> Education & Training	<input type="checkbox"/> Personal Assistance
<input type="checkbox"/> Employment	<input type="checkbox"/> Self-Help/Pers. Growth
<input type="checkbox"/> Equip/Assist Devices	<input type="checkbox"/> Social/Recreation
<input type="checkbox"/> Finance/Benefits	<input type="checkbox"/> Transportation

Least Helpful Services

<input type="checkbox"/> Consumer Rights	<input type="checkbox"/> Health Care/Nutrition
<input type="checkbox"/> Communication	<input type="checkbox"/> Housing
<input type="checkbox"/> Daily Living/Self-Care	<input type="checkbox"/> Mobility
<input type="checkbox"/> Education & Training	<input type="checkbox"/> Personal Assistance
<input type="checkbox"/> Employment	<input type="checkbox"/> Self-Help/Pers. Growth
<input type="checkbox"/> Equip/Assist Devices	<input type="checkbox"/> Social/Recreation
<input type="checkbox"/> Finance/Benefits	<input type="checkbox"/> Transportation

Close

Feedback Section 2

Consumer Survey 

Name: Date: Office:

Services **Feedback Section** Agency Contacts

Feedback Section

Please identify the staff person who you believe helped you the most:

Did you receive the assistance you requested?

Are you satisfied with the services you requested?

Communication effectiveness of the reception staff:

Services were provided in a timely manner:

The IL staff treated me with respect:

Staff responded and returning my calls:

While working with the CIL:

I gained new knowledge:

I learned new skills:

I learned to problem-solve better:

My situation changed and improved:

My overall personal growth to live independently was improved:

Comments:

Close

General Services Module

General Services Search

Service Type:

Office Name:

Staff Name: Anabel Rios

Starting Date:

Ending Date:

[Search](#) [Reset Search](#) [New General Service...](#)

Date	Service Type	Staff	Office	Funder	Hours
03/22/2022	Staff Meeting	Anabel Rios	HCIL	HCIL/ACL-HHS	1
03/17/2022	Program Coordination	Anabel Rios	HCIL	HCIL/ACL-HHS	1
03/11/2022	Program Coordination	Anabel Rios	HCIL	HCIL/ACL-HHS	2
03/03/2022	Staff Development	Anabel Rios	HCIL	HCIL/ACL-HHS	1
03/02/2022	Staff Development	Anabel Rios	HCIL	HCIL/ACL-HHS	1
03/01/2022	Report Development	Anabel Rios	HCIL	HCIL/ACL-HHS	7
02/04/2022	Staff Development	Anabel Rios	HCIL	HCIL/ACL-HHS	1
12/16/2021	Staff Development	Anabel Rios	HCIL	HCIL/ACL-HHS	8
12/15/2021	Staff Development	Anabel Rios	HCIL	HCIL/ACL-HHS	2
11/17/2021	Staff Development	Anabel Rios	HCIL	HCIL/ACL-HHS	1
11/04/2021	Staff Development	Anabel Rios	HCIL	HCIL/ACL-HHS	8

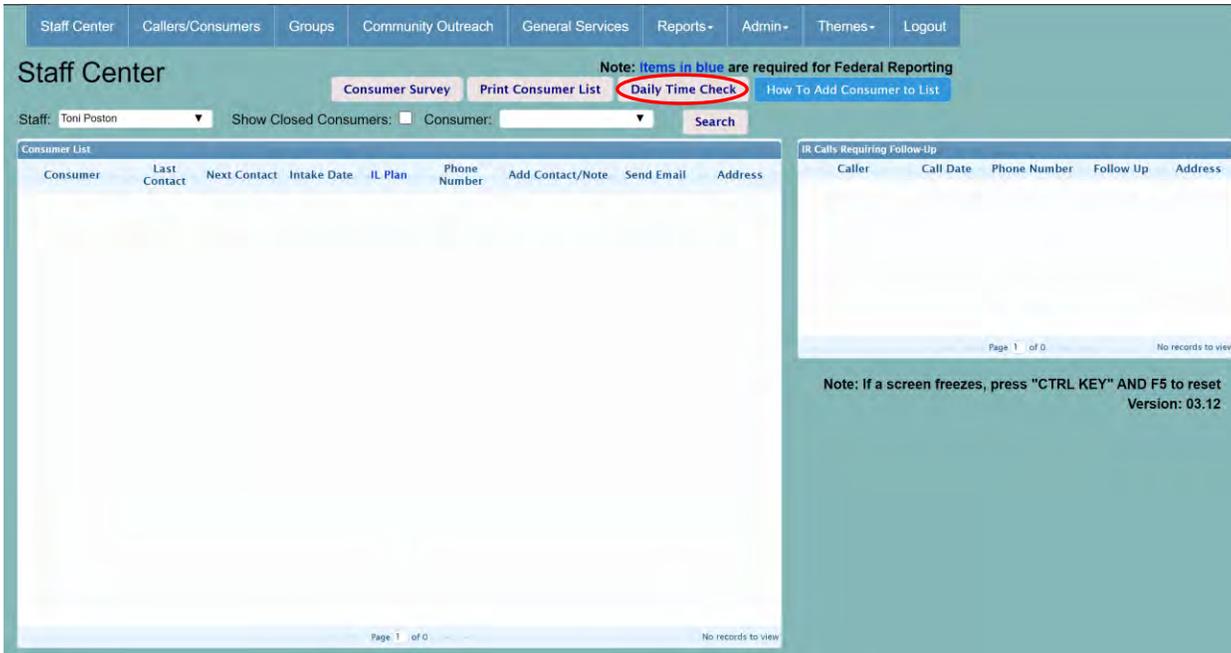
Page 1 of 1 View 1 - 11 of 11

Track all other time, not related to direct Consumer Contact in General Services. Units are 1 for each 15 minutes.

Use General Services to track:

- Staff Travel
- Staff Training
- May be used to track activities related to projects and grants.

Staff Timesheet Report



After Staff have entered all time in MICIL, you can run the Staff Timesheet report. This report will add up all time entered for a week or 2 week period, which ever you choose. This report is an essential management tool to ensure that your agency will get credit for all your hard work.

To print this, click on File and Print.

