AAA Nutrition Counseling and Nutrition Education Data Entry

This document pertains specifically to Area Agencies on Aging for the delivery of the Nutrition Counseling and Nutrition Education services. A concise summary of each detailed topic within this guide is provided below.

**Identify Clients for Nutrition Counseling and Nutrition Education:**

For Nutrition Education, each individual receiving meals should also be provided with this service. The Event Profiles used for meals tracking can be utilized to add these same clients to the Nutrition Education Event(s). For Nutrition Counseling, individuals having an NSI score of 11 or higher and who have also answered ‘Yes’ for question 9 of the NSI, (“Without wanting to, I have lost or gained 10 pounds in the last 6 months”), a referral to the Nutrition Counseling service should be done. The ‘Nutritional Screening Analysis’ report can be used to identify those with these NSI values for Nutrition Counseling.

**Refer Clients to Nutrition Counseling:**

Referrals to Nutrition Counseling are done by using the CRIA2 Internal Transfer feature. The ‘CRIA History’ View Builder can be used to view the referrals. The Nutrition Counseling service is typically set up in the same location where meals services occur. For that reason, the individuals referred for Nutrition Counseling will be internally transferred to those meals program where the individual is typically already enrolled and receiving meals. By using that existing enrollment, the next step after the referral is processed will be to add the person to the dedicated Nutrition Counseling Event Profile for units tracking.

**Document Notes for Nutrition Counseling and Nutrition Education:**

Notes should be entered into the program enrollment Notes area for any notes pertaining to Nutrition Counseling or Nutrition Education. General Comments should not be used for notes pertaining specifically to Nutrition Counseling and Nutrition Education since notes entered into General Comments are shared with other agencies having valid Consent to the Client Profile. The notes entered into the program enrollment will roll up into the Client Profile Agency All Notes location. It is recommended to use the Note Subject line to identify the note as pertaining to Nutrition Counseling or Nutrition Education.

**Track Service Units for Nutrition Counseling and Nutrition Education:**

Service units are to be tracked for Nutrition Counseling and Nutrition Education. These units can be tracked within the dedicated Event Profile for each separate service.

**Identify Clients**

In this section, there are references to the Local NWD IT Admin. If this individual is unknown or undetermined for your agency, contact the help desk at NWDHelp@dars.virginia.gov for assistance.

**Nutrition Education**

Since Nutrition Education should be provided to all individuals receiving meals, the event profiles used for current meals tracking can be utilized to quickly identify these individuals and then add them to the new Event(s) which will be used for Nutrition Education.

1. Go to the ‘Track Service Units’ section in this guide and perform steps 1-4.
2. Perform these four steps for every program location and Event Profile where Nutrition Education will be tracked (ie. all the programs and events where meals are tracked).
3. If you do not know which Programs and / or Events are used for meals tracking, contact the local NWD IT Admin of your agency for assistance.

**Nutrition Counseling**

Since Nutrition Counseling requires a review of the NSI, additional steps are needed beyond simply utilizing existing Event Profiles for meals to identify the clients for Nutrition Counseling. A report should be run to identify those with NSI values appropriate for Nutrition Counseling referrals.

1. After successfully logging in to the PeerPlace system, Run the ‘Nutritional Screening Analysis’ report for the last 6 months
	1. Click on Reports
	2. Select ‘Nutritional Screening Analysis’ for Report Type
	3. Enter a value in Report Title
	4. Select ‘Submit to Run’ for Status
	5. Enter a date span for Start Date and End Date that will represent the last 6 months
	6. Select the program where meals are provided
	7. Click Save and Exit
	8. Click Go until the report status is ‘Completed’
	9. Click the Download link provided in the Output column
2. Filter the report for those requiring a Nutrition Counseling referral
	1. Click (highlight) row 6
	2. Click Sort / Filter
	3. Filter column M (Q9) equal to ‘Yes’
	4. Filter column O (Total Score) - uncheck values 10 or less
		1. Use this filtered list to make Referrals (Internal Transfers) in CRIA2 for Nutrition Counseling

NOTE: This report will soon be changed to allow run by ‘All Programs’ and will also include the Client id, Client Address, Client Phone and Email

**Referral to Nutrition Counseling**

In this section, there are references to the Local NWD IT Admin. If this individual is unknown or undetermined for your agency, contact the help desk at NWDHelp@dars.virginia.gov for assistance.

**Nutrition Counseling Referral using the CRIA2 Internal Transfer**

Since Nutrition Counseling should only occur after a referral to the Nutrition Counseling service, a referral to Nutrition Counseling is needed prior to adding individuals to an Event Profile for Nutrition Counseling.

1. Using the list created in the ‘Nutrition Counseling’ portion of the ‘Identify Clients’ section of this guide, proceed with the following steps to perform Nutrition Counseling referrals
	1. Go to the CRIA2 program (\*or program where client is currently enrolled for meals and use New Encounter button on Client Profile)
	2. Search by name for each person on the filtered NSI report and create a New Encounter
	3. Within the new encounter, perform an Internal Transfer to the Nutrition Counseling service and associated program
		1. Click on CRIA Internal Transfer
		2. Click New
		3. Select the ‘Internal Transfer Service’ which has a program value consistent with [Nutrition Counseling]
			1. If none exist, contact your local NWD IT Admin
		4. Select the ‘Send to Program Queue’ value of the program where the service will be provided
			1. If this value is not known, consult your local NWD IT Admin
			2. This program value is where the referral (transfer) will arrive in the program queue
		5. Click Save and Exit
2. Run the View Builder named CRIA History in the CRIA2 program with a filter of Screen equal to CRIA Internal Transfer and Support Detail equal to Nutrition Counseling to see a list of all referrals made to Nutrition Counseling from CRIA2 (SAMPLE – Screen shot below)



1. Referrals can also be seen in the Client Profile / Encounter History of the program to which the Internal Transfer was sent
2. The referral to Nutrition Counseling will appear in the selected Program’s queue and if the individual referred elects to receive the Nutrition Counseling service, then the individual can be added to the Event Profile where Nutrition Counseling is tracked (see step 4 under Event Profile in the Track Service Units section of this guide)
3. Since Internal Transfers can only be performed in a CRIA Encounter and it is the Internal Transfers which are used to document the Referral to Nutrition Counseling, while in the CRIA Encounter, other activities can be performed as well including but not limited to: Unmet Needs tracking; External Referrals to other agencies; Notes; Follow Ups; Additional Contacts (service units for contacts) stemming from communications with the individual during the referral process

**Notes Entry**

In this section, there are references to the Local NWD IT Admin. If this individual is unknown or undetermined for your agency, contact the help desk at NWDHelp@dars.virginia.gov for assistance.

**Nutrition Counseling and Nutrition Education Notes**

Notes are an important and effective method to document the referral activities related to Nutrition Counseling as well as all the activities which occur during the process of providing both Nutrition Counseling and Nutrition Education. While these notes are essential to documenting the activities of both of these services, it is highly recommended NOT to place these notes in the General Comments. Any notes placed in General Comments are accessible to any other agency with valid unexpired Consent. Therefore, we recommend using the ‘Enrollment’ notes which will also roll up into the Client Profile / Agency All Notes.

1. After successfully logging into the system and navigating to a client’s enrollment (program where Nutrition Counseling and /or Nutrition Education will be tracked), click the Notes link on the left
	1. Quick Tip – you can use the Event Profile roster to quickly get to the full list of clients receiving the service in lieu of searching by name in the program
2. To create a new note click the NEW button
3. Enter a date for the note ***OR*** allow the system to pre-fill it with today’s date
4. Select a Case Manager (person entering the note)
5. Select a Contact with (note that you can update the client profile contacts list and the ‘contact with what individual dropdown’ by clicking on the Add Contact button)
6. Select a Note Type
7. Enter a Subject for the Note that will have meaning to anyone viewing all notes in a list
	1. It is highly recommended to include the words ‘Nutrition Counseling’ or ‘Nutrition Education’ or some sort of abbreviated version of these words in the subject line of notes related to these services along with other helpful words such as ‘Referral’, ‘Referral Rejected’, ‘Enrolled in Nutrition Counseling’, etc.
8. Enter the content of the note in the Notes textbox
	1. You may save the note at any time in a draft format which allows for edits later or ‘Save as Final’ to finalize the note from additional edits
9. As long as a note is NOT in the Finalized status, you may select, view, edit and finalize the note by selecting it using the link on the Date field in the Notes list view
10. Use the Print Notes button to print (view) all your notes in full
11. All notes entered into the enrollment notes screen for that individual will be accessible on the Client Profile Agency All Notes section
	1. Click on the Client id at the top of the screen to toggle over to the Client Profile where Agency All Notes can be accessed

Notes are to be entered in regards to activities involved with Nutrition Counseling and / or Nutrition Education. Notes should also be entered to indicate the referral activities (examples include but are not limited to: referral made, referral accepted, referral rejected, enrolled in Nutrition Counseling) with Nutrition Counseling.

**Track Service Units**

In this section, there are references to the Local NWD IT Admin. If this individual is unknown or undetermined for your agency, contact the help desk as NWDHelp@dars.virginia.gov for assistance.

**Event Profile**

1. Login to PeerPlace at <https://vda.peerplace.com>
2. Click on the dropdown at the top of the screen to select the program where the units entry will take place
3. To create a new Event to track units perform the following steps:
	1. Click on Event Profile
	2. Click New
	3. Enter Start Date
	4. Enter End Date
	5. Set Status to Open
	6. Enter Name
	7. Enter Location (optional)
	8. Enter Event Type
	9. Select a Service Type (NOTE: Contact the Local NWD IT Admin for guidance on this field if unknown)
	10. Select a Funder (NOTE: Contact the Local NWD IT Admin for guidance on this field if unknown)
	11. Select a Unit Type (NOTE: Contact the Local NWD IT Admin for guidance on this field if unknown)
	12. Enter Fee Amount (optional)
	13. Enter Event Comments (optional)
	14. Click Save and Exit
	15. Repeat Event Profile setup process for each unique Event where units are to be tracked
	16. Events can be reused each month for units entry
4. Adding Individuals to Events:
	1. Go to each existing Home Delivered Meals and Congregate Meals Event and perform the following steps to add clients to the new event(s)
		1. Click on Event Profile Sign-Up
			1. Click on the Client Name (where Program Status is Active)
			2. Click on Encounter History
			3. Click on enrollment (may be registration, intake or case file)
			4. Click on Event Profile Sign-Up
			5. Click Edit
			6. Check the box next to the Event(s) for Nutrition Education and Nutrition Counseling (\*referral required for Nutrition Counseling)
			7. Click Save and Exit
			8. Click Exit to go back to Event list of Clients
			9. Repeat steps 1-5 for each Client in the Event
5. To enter and track units perform the following steps:
	1. Click on Event Profile
	2. Click on the Event where units are to be entered
	3. Click Units Entry
	4. Complete Event Details Section as applicable for type of event
	5. Enter total number of units in the Units column beside each individual served for the Actual Date of Occurrence identified in the Event Details Section (if entering units monthly, use the last day of the month for ‘Actual Date of Occurrence’)
		1. Select a Funding if funding option for Event was set to multiple (NOTE: Contact the Local NWD IT Admin for guidance on this field if unknown)
	6. Click Save when units have all been entered
	7. Verify that Total Units shows the expected total number of units for this date (edits can be made to units entry at any time as needed)
	8. Click Save & Exit when units have all been entered

**Reports and Views**

The following reports and views are useful for the Nutrition Counseling and Nutrition Education data entry and tracking. Views are located in View Builder from the main menu screen and Reports are located in Reports from the main menu screen. Views are typically program specific in that they pull back only data in that program where the view is generated. In this section of this guide, the document search feature can be used to locate a specific data element to identify which report(s) or view(s) contains the data element.

**Views**

|  |  |  |
| --- | --- | --- |
| Name | Description | Columns (content inclusive of some additional columns only visible when exported to excel) |
| Client Units | Service units with an occurrence / date of service during specified date span listed out by individual served | Client IDClient NameDOBAddressHome PhoneMobile PhoneGenderMarital StatusLives WithFrail/DisabledService DateService TypeUnit SourceFunding SrcUnitsUnit TypeAmount PaidConsentMailing Address1Mailing Address2Mailing CityMailing StateMailing ZipEmail Address |
| CRIA History | Listing of CRIA2 actions during the designated date span, including External Referrals, Internal Transfers, Unmet Needs, Follow Ups, and Notes TIP – this is a good list to filter by ‘CRIA Screen’ to get a quick list of Follow Ups, Notes, External Referrals, Unmet Needs, or Internal Transfers with details and a link to each one | Client IDClient NameCountyEncounter IDAction DateCRIA ScreenContact TypeAgency CategoryEncounter CategoryCase ManagerMethod/Category/StatusSupport TypeSupport DetailConsent |
| Event Profile Meal Units | Service units with an occurrence / date of service during specified date span which were entered through Event Profile and Event Type indicates Meal | RowEvent NameAuthorEvent TypeEvent DateTotal UnitsTotal $Service TypeMeal TypeFunding SourceMeals OrderedMeals Received |
| Event Profile Meal Units Summary | Service units with an occurrence / date of service during specified date span which were entered through Event Profile and Event Type indicates Meal | Service TypeMeal TypeFunding SourceTotal UnitsTotal Clients (Unduplicated) |
| Event Profile Units | Service units with an occurrence / date of service during specified date span which were entered through Event Profile  | RowEvent NameAuthorEvent TypeEvent DateLead Worker/Driver/Event Manager NameTotal UnitsTotal ClientsTotal $Service Type |
| Served Clients (VA – Custom) | Listing of unique individuals served where service units occurrence / date of service fell within the designated date span  | RowClient NameDOBAddressPhoneGenderMarital StatusLives WithFrail/DisabledRaceEthnicityPoverty LevelCase ManagerCountyConsentFirst NameLast NameMailing Address1Mailing Address2Mailing CityMailing StateMailing Zip |

**Reports**

|  |  |  |
| --- | --- | --- |
| Name | Description | Tabs / Sections / Columns  |
| AAA Service Summary  | Report used by AAAs to complete the required AMR for aggregated units and number of individuals served (Page 3 tab is the primary portion of this report used for AMR reporting) | **Page 1 (tab)**Racial DetailEthnicity DetailRural Status DetailPoverty Status DetailCommunity Focal Points and Senior Centers**Page 2 (tab)**Staffing CategoriesFTE staff of agencyFTE minority staff of agencyFTE paid in full with OAA**Page 3 (tab)****Title III (Excluding Title III-E) (section)**\*Services (listing out unique services by row Example – Adult Day Care, Homemaker, Transportation, etc.)UnitsPersons (Unduplicated)**VDA Funding (section)**\*Services (listing out unique services by row Example – Options Counseling, S.O.S. Referrals, CCEVP 2, etc.)Units Persons (Unduplicated) **Title III-E (section)**\*Services (listing out unique services by row Example – Caregiver Training, Support Groups, Institutional Respite, etc.)UnitsClients Served with CaregiverClients Served without CaregiverCaregivers ServedCaregivers BenefitedGrandparents and Other Elderly CaregiversIndividuals**Page 4 (tab)**Utilization and Expenditure ProfileServicesTotal ProvidersMinority ProvidersRural Providers**Page 5 (tab)**Total Providers Title III-E OnlyServices**Certify (tab)**CertificationExecutive Director SignatureDate**Rural Classification (tab)**PSAJurisdictionRural Status**Definitions Pg 1 (tab)**Explanation of report logic**Definitions Pg 3 (tab)**Explanation of report logic |
| AAA Service Summary Sub-Contractors | Report used by AAAs to complete the required AMR for aggregated units and number of individuals served and there is at least one linked sub-contractor identified by the Agency Sharing screen at the Sub-contractor location (Page 3 tab is the primary portion of this report used for AMR reporting) | **Page 1 (tab)**Racial DetailEthnicity DetailRural Status DetailPoverty Status DetailCommunity Focal Points and Senior Centers**Page 2 (tab)**Staffing CategoriesFTE staff of agencyFTE minority staff of agencyFTE paid in full with OAA**Page 3 (tab)****Title III (Excluding Title III-E) (section)**\*Services (listing out unique services by row Example – Adult Day Care, Homemaker, Transportation, etc.)UnitsPersons (Unduplicated)**VDA Funding (section)**\*Services (listing out unique services by row Example – Options Counseling, S.O.S. Referrals, CCEVP 2, etc.)Units Persons (Unduplicated) **Title III-E (section)**\*Services (listing out unique services by row Example – Caregiver Training, Support Groups, Institutional Respite, etc.)UnitsClients Served with CaregiverClients Served without CaregiverCaregivers ServedCaregivers BenefitedGrandparents and Other Elderly CaregiversIndividuals**Page 4 (tab)**Utilization and Expenditure ProfileServicesTotal ProvidersMinority ProvidersRural Providers**Page 5 (tab)**Total Providers Title III-E OnlyServices**Certify (tab)**CertificationExecutive Director SignatureDate**Rural Classification (tab)**PSAJurisdictionRural Status**Definitions Pg 1 (tab)**Explanation of report logic**Definitions Pg 3 (tab)**Explanation of report logic **Rural Classification (tab)**PSAJurisdictionRural Status**Definitions Pg 1 (tab)**Explanation of report logic**Definitions Pg 3 (tab)**Explanation of report logic |
| AAA Service Summary Client Details | Supplemental report to the AAA Service Summary which lists out the individual clients served in detail | **Details (tab)**Client IDClient NameRaceEthnicityRural StatusProgramServiceNAPIS GroupState Service TypeEventService DateUnits**Title IIIE (tab)**Client IDClient NameCaregiver IDCaregiver NameCaregiver Served?Grandparent or Other Elderly Caregiver**Definitions (tab)**Explanation of report logic |
| Event Roster Report | Printable template of individuals within a specified Event which can be formatted for attendance or other manual processes  | Last NameFirst NamePhoneEmergency Contact (name)Emergency Contact (phone) |
| Event Roster Report - Excel | Printable template of individuals within a specified Event which can be formatted for attendance or other manual processes – excel version provides for additional flexibility with formatting or manipulation including days of the week  | Last NameFirst NamePhoneEmergency Contact (name)Emergency Contact (phone)Days of the week |
| Nutritional Screening Analysis | Detailed listing of clients including the answers for NSI for date span of report laid out in a grid format with a summary section at the bottom - each question matches up to the NSI and is identified as Q and the question number. | Client NameClient DOBCountyLast Assessment DateQ1Q2Q3Q4Q5Q6Q7Q8Q9Q10Total Score |
| Served Client Summary | Aggregated counts of units and individuals served during the specified time frame listed out by different service categories on different tabs | **Demographics (tab)**Total ServedAgeFrail/DisabledRuralGenderLives WithPoverty LevelRaceLow Income MinorityEthnicity**ServiceType (tab)**Service TypeSourceUnit TypeFunding SourceTotal UnitsTotal Unduplicated ClientsTotal Duplicated Clients**StateServiceType (tab)**State Service TypeTotal UnitsTotal Unduplicated ClientsTotal Duplicated Clients**NAPISServiceType (tab)**NAPIS Service TypeTotal UnitsTotal Unduplicated ClientsTotal Duplicated Clients **FundingSource (tab)**Funding SourceTotal UnitsTotal Unduplicated ClientsTotal Duplicated Clients**StateServiceFundingSource (tab)**State Service TypeFunding SourceTotal UnitsTotal Unduplicated ClientsTotal Duplicated Clients**NAPISServiceFundingSource (tab)**NAPIS Service TypeFunding SourceTotal UnitsTotal Unduplicated ClientsTotal Duplicated Clients**Definition (tab)**Explanation of report logic |
| Service and Units Summary | Aggregated listing of services during designated date span listed out on separate tabs by different service unit categories.  | **NAPIS Group (tab)**NAPIS GroupClients Served (Duplicated)Clients Served (Unduplicated)UnitsTotal excluding NAPIS Group, “Local AAA”Percentage and Total Units keyed 42 days after service delivered**State Service Type (tab)**State Service TypeClients Served (Duplicated)Clients Served (Unduplicated)UnitsTotal excluding NAPIS Group, “Local AAA”Percentage and Total Units keyed 42 days after service delivered**Program (tab)**ProgramClients Served (Duplicated)Clients Served (Unduplicated)UnitsTotal excluding NAPIS Group, “Local AAA”Percentage and Total Units keyed 42 days after service delivered**Service (tab)**ServiceClients Served (Duplicated)Clients Served (Unduplicated)UnitsTotal excluding NAPIS Group, “Local AAA”Percentage and Total Units keyed 42 days after service delivered**Funding Source (tab)**Funding SourceClients Served (Duplicated)Clients Served (Unduplicated)UnitsTotal excluding NAPIS Group, “Local AAA”Percentage and Total Units keyed 42 days after service delivered**County (tab)**CountyClients Served (Duplicated)Clients Served (Unduplicated)UnitsTotal excluding NAPIS Group, “Local AAA”Percentage and Total Units keyed 42 days after service delivered |
| Units Detail Report | Detailed listing of units occurring within the user designated date span | **Units Detail (tab)**Client IDClient NameCountyZip CodeService DateProgramService TypeNAPISState Service TypeAuthorCase ManagerUnit TypeUnit SourceService UnitsTime SpentFunding SourceService CommentsEncounter TypeEncounter CategoryAgency Category**Definition (tab)**Explanation of report logic |