AIMS MANUAL: CLIENT DATA ENTRY

Research and Analysis

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Overview of Data Entry

Data entry involves accurately entering, updating, and maintaining information. This includes reviewing source documents, verifying information for completeness, and ensuring all the records follow business practice standards. Effective data entry supports consistent reporting, reduces errors, and ensures that all program activities and participant details are captured in a timely and reliable manner. **Ideally, data for clients should be entered at the time of the event.** However, during extenuating circumstances, best practice is to enter the data within **two business days**.

Why Data Entry is Important

Timely and reliable data entry ensures that best practice standards are met. Data entry compliance (or lack thereof) may be used for evaluating staff performance or agency contractual compliance. Paper files can be unreadable, contradictory, or incomplete; therefore, best practice standards recommend the use of databases that can support analysis, produce summary reports or dashboards, and track key performance indicators (KPIs) and performance benchmarks[1].

The purpose of this manual is to provide data entry guidelines for OPSC programs. The data elements are not explicitly required in AIMS unless the field is marked with an (*) when entering the data. If some of the data content does not apply to your program, follow your program's business practices.

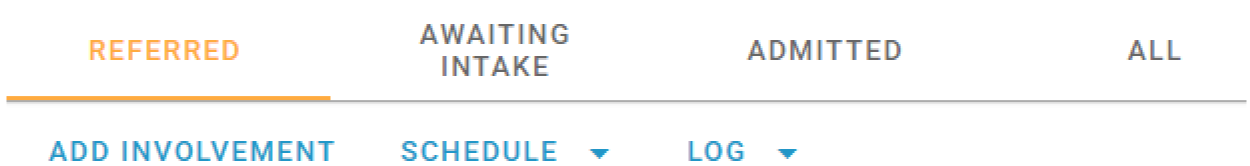
Client Entry

Adding an Involvement

Involvements are essentially a client's relationship to the program in which they are assigned. A client usually has an open court case or cases. AIMS uses involvements to make case management easier by allowing for scheduling contacts, drug tests, and hearings all under one involvement instead of each related case within an involvement. For instance, a client's demographic needs to only be recorded once and will be associated with all involvements, current and future.

Adding an involvement is prompted by a referral. Under *Specialty Court*:

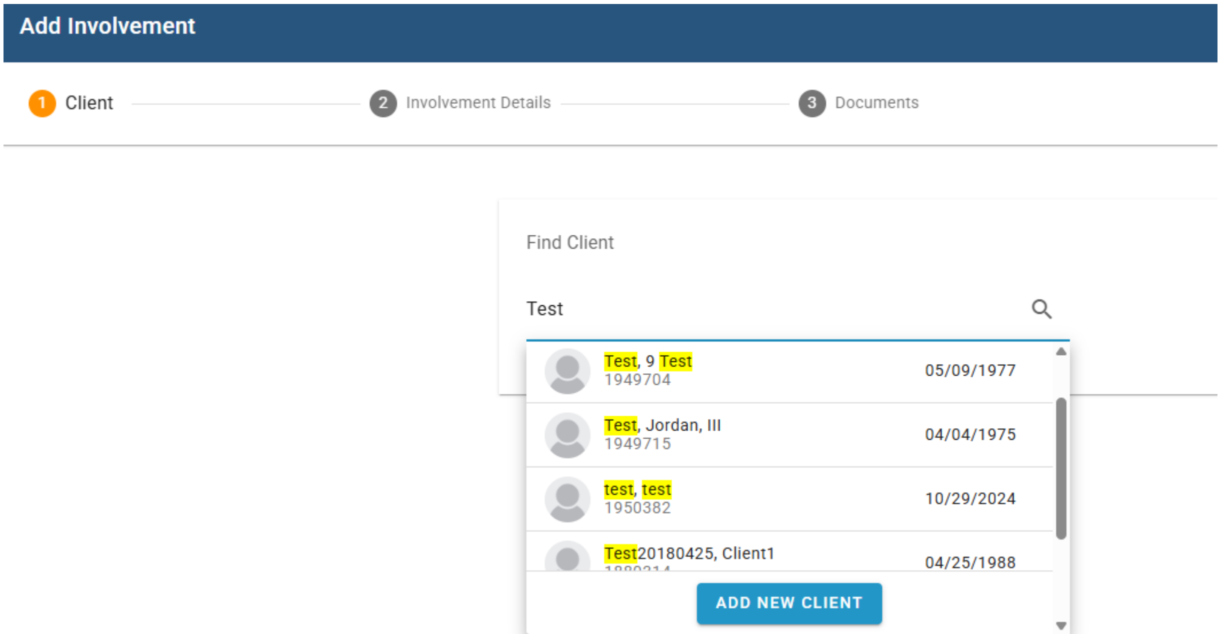
1) Select 'Clients'
2) Select 'Add Involvement' under Referred



3) Select the space under 'Find Client', upon typing the referred individual's name, if an involvement has already been created in the past, enter the Client Name or Client ID (if it is known). The system will suggest any possible matches as the

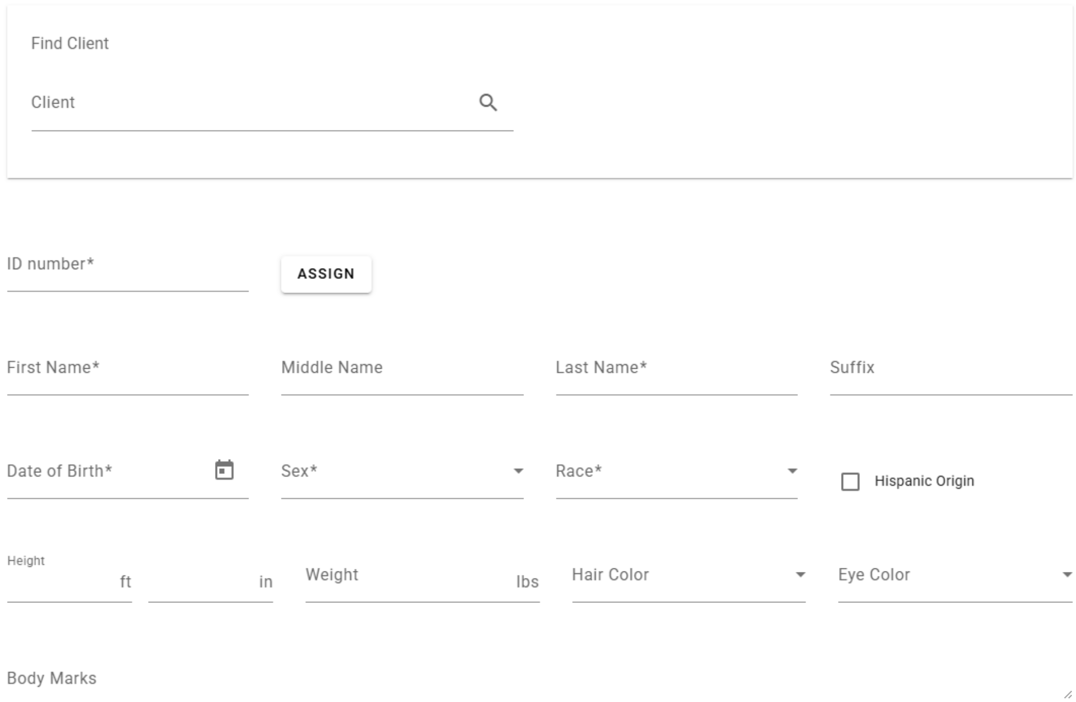
[1] For more information on Adult Treatment Court Best Practice Standards, see https://allrise.org/wp-content/uploads/2026/01/All-Rise_Adult-Treatment-Court-Best-Practice-Standards_January-2026.pdf

individual may already be known. Verification of personal identifying information (PII) is important to avoid duplication of existing clients. If it is a new client, select 'Add New Client'

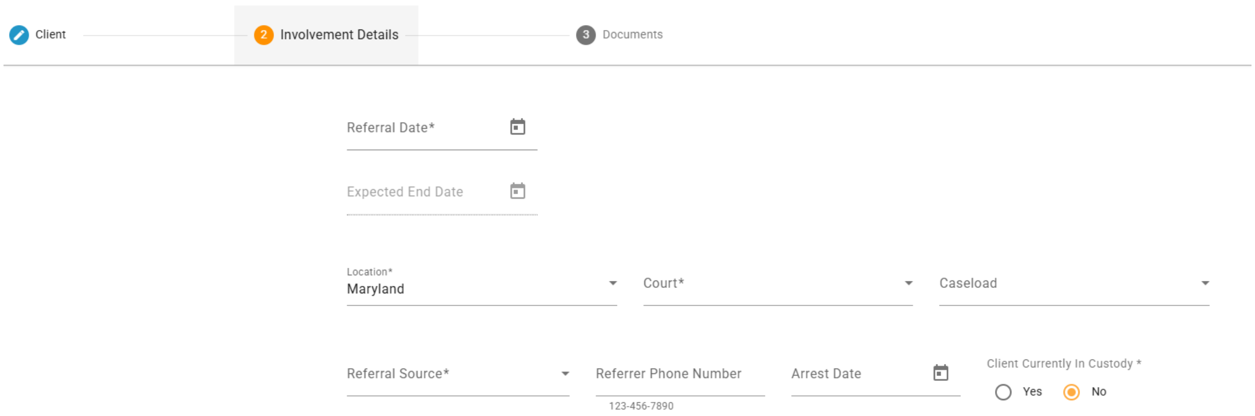


4) For existing clients, demographic information will already be populated but may need to be updated based upon current referral. For new clients, fill out client demographic information, including assigning an ID number, according to your program's business practice. *Demographics cannot be updated until involvement is created. *

a. Mandatory: First and Last Name, Date of Birth, Sex, Race, Hispanic Origin (if applicable)



5) Next page is ‘Involvement Details’. Fill in the necessary information, such as referral date, court location, referral source, and custody whereabouts. Referral sources include:
    a. Correctional Officer
    b. Defense Attorney-Private
    c. Family
    d. Judge/ Magistrate
    e. Law Enforcement
    f. Other
    g. Public Defender
    h. School/Board of Education
    i. Self
    j. States Attorney
    k. Treatment/Social Worker



6) The final step for adding an involvement, is uploading any referral documents (optional).

The new referral is now added to the AIMS system as an involvement. The involvement will appear under the Referred tab. The involvement will now also have a system-created Involvement ID. *The Involvement ID is separate from the Client ID and only applies to the involvement*.

Client Involvement Data

Client Overview

Once the involvement has been added, you can now view the Client tab and add information. The first panel option is the Overview. The Overview shows Involvement History card and an Activities Calendar. Under this panel, you are also able to add additional involvements for an existing client.

To see a condensed version of what is required, preferred, or optional for data entry, see Cheat Sheet: Client Data Entry Requirements.

Client data entry is categorized into three main categories:

- **Required**: must be inputted into AIMS for data entry; constitutes minimal input for grant compliance
- **Preferred**: highly recommended, if the information is available

- **Optional** : optional—encouraged; follow program business practices

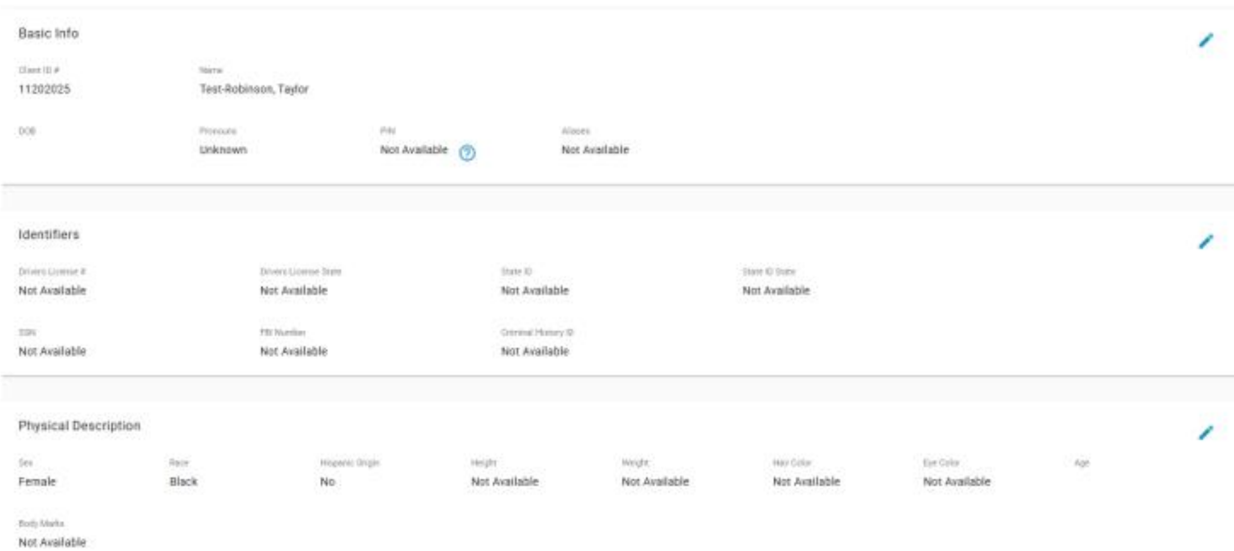
Client Info

The Client Info panel allows for you to enter/edit (Edit by clicking the pencil icon):

Personal Info: Basic demographic information and background information can be found here. The following are **required** data elements:

- Name (First, Middle, Last)
- Date Of Birth
- Sex
- Race
- Hispanic Origin
- Primary Language
- English Speaking
- State of Residence

> **IMPORTANT**
>
> Always refer to your program's business practices concerning optional data.



Background and demographic information are important for accurate data entry for problem-solving courts. This information ensures consistency, supports reliable reporting, helps identify potential disparities and service needs, and allows programs to evaluate outcomes fairly while maintaining data integrity and accountability.

If available, the following are **preferred** data elements:

- Aliases
- Driver's License #
- Driver's License State
- State ID
- State ID State
- Social Security Number (SSN)
- FBI Number
- Criminal History ID
- Marital Status

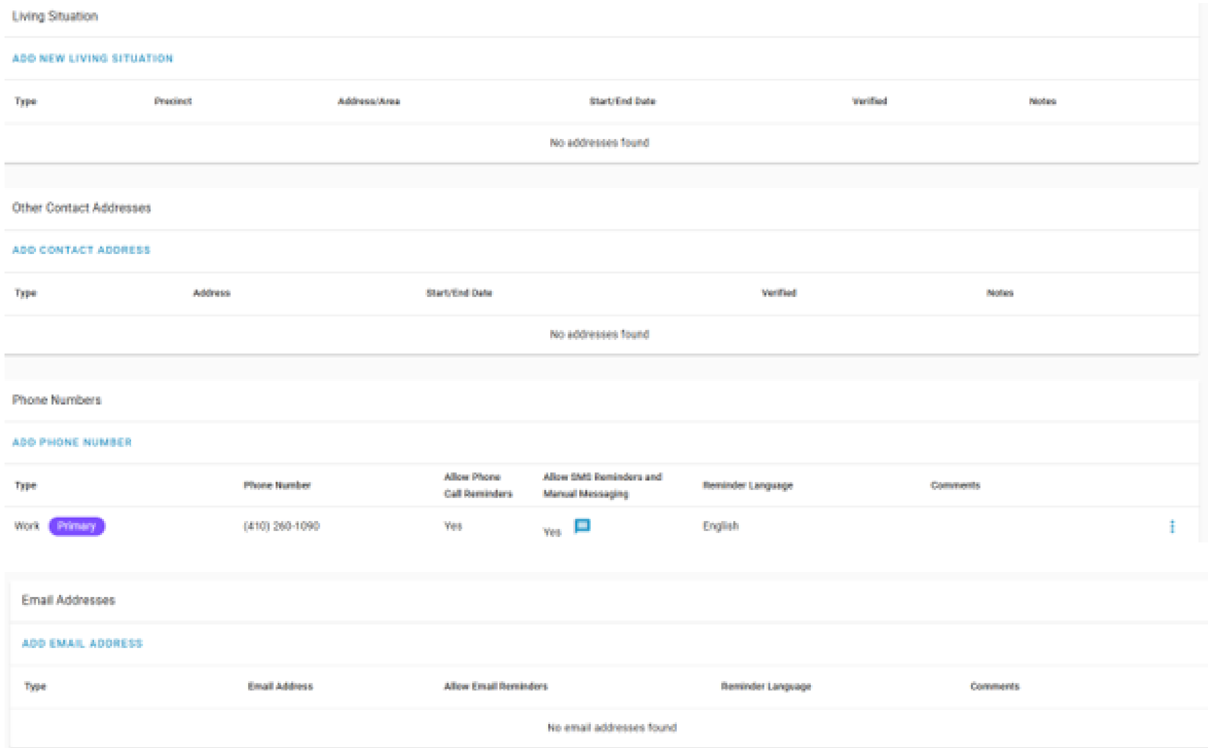
IMPORTANT

For Veterans Treatments Courts, especially, it is best practice to provide SSN data for benefits or resources associated with the Dept. of Veterans Affair.

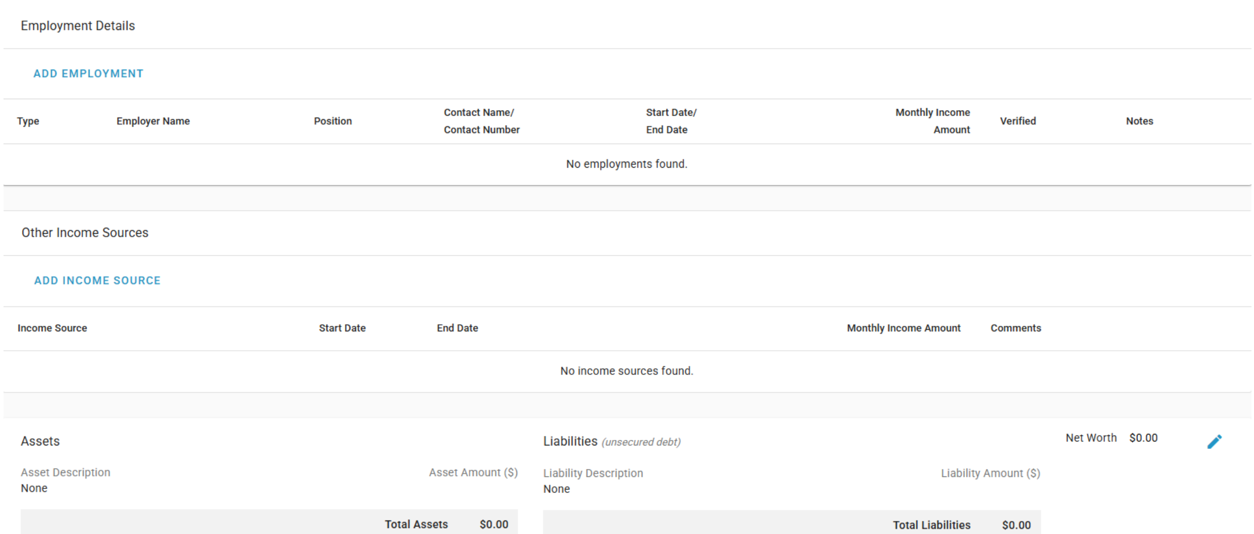
**It is best to enter SSN data, in case there are individuals with similar names or dates of birth.*

Information, such as Pronouns, Citizenship Status, Country of Residence, In State Since, and Place of Birth, are **optional** and it is encouraged to fill this information based on your program's business practices.

Contact Info: Displays client addresses, phone numbers, and email addresses are **required** data elements. Use the *living situation* card to document whether a client is unhoused, lives with someone (not paying rent), rents or owns their home. You will also be able to indicate whether the living situation has been verified. The living situation cards allows for multiple entries. Use the *other contact addresses* to document other addresses such as mailing or work address (**optional**).



<u>Employment/Financials</u>: Displays the client's employment, income, assets and liabilities. Employment details are **preferred** data elements, while other income sources and assets/liabilities are **optional** data elements.



<u>Education</u>: Displays education information are **required** data elements.

ADD SCHOOL

Education Level	School Name	Currently Attending	Start Date ↓	End Date	Degree/Diploma/Certification Earned	Comments

Military Service: Showcases records of client's military service, including dates of service, status/discharge type, DD214 status and VHA eligibility. These data elements are **required**, if applicable.

ADD MILITARY SERVICE

Military ID #	Branch of Service	Service Dates	Years of Service	Military Status/Discharge Type	Pay Grade	Served During Conflict	Service-Connected Disability/Disability %	Has DD214	VHA Eligible
				No military service found					

Clinical Info: Shows client's medical information. Diagnoses and prescriptions are **preferred** data elements, while insurance information and pregnancy are **optional**.

Diagnoses

Diagnosed with Substance Use Disorder
Not Available

Diagnosed with Mental Illness
Not Available

Communicable Diseases
Not Available

Allergies
Not Available

Prescriptions

☐ One or more of these prescriptions could conflict with drug testing results

ADD PRESCRIPTION

Prescription	Dosage	Expiration Date	MAT	Comments
		No prescriptions found.		

Drug Use: Client primary and secondary drug of choice are **preferred** data elements.

Drug Use

Primary Drug of Choice	Secondary Drug of Choice	Age at Onset of Drug Use
Not Available	Not Available	Not Available

Family: Names and contacts of client family members. Who the client lives with and/or their emergency contact are **required** data elements. You can add a tag to the family contact noting if the contact is an emergency contact or others (e.g., closest relative, immediate family)

ADD FAMILY MEMBER

Name	Relationship	Tags	Date Of Birth	Phone Number	Email Address	Address	Notes

No family members found.

Associates: Names and contact information for the client's non-family associates, such as friends (can be considered fictive kin), caseworkers, and attorneys are **required** data elements.

ADD ASSOCIATE

Name	Relationship	Tags	Date Of Birth	Phone Number	Email Address	Address	Comments

No associates found.

TANF: These data elements are **optional**.

TANF Details

TANF Eligible	TANF Certification Date
Not Available	Not Available

Disclosures: These data elements are **optional**.

LOG DISCLOSURE

	Request Date	Requestor	Disclosure Dates	Purpose of Disclosure	Disclosed By	Information Disclosed	Comments

Legal History: Displays client's legal history, which can include offenses reported by multiple state or federal agencies. These data elements are **optional**.

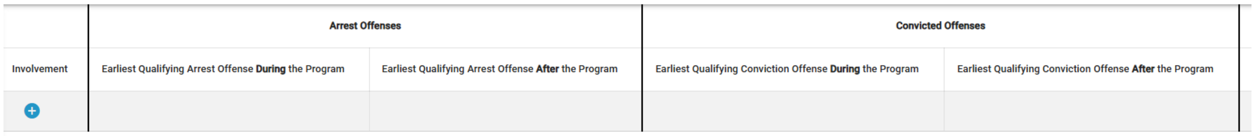
ADD OFFENSE

Age at First Arrest
Not Available

	Reporting Agency/Cycle	Offense Date	Statute	Level & Degree	Qualifiers	Disposition	Sentence

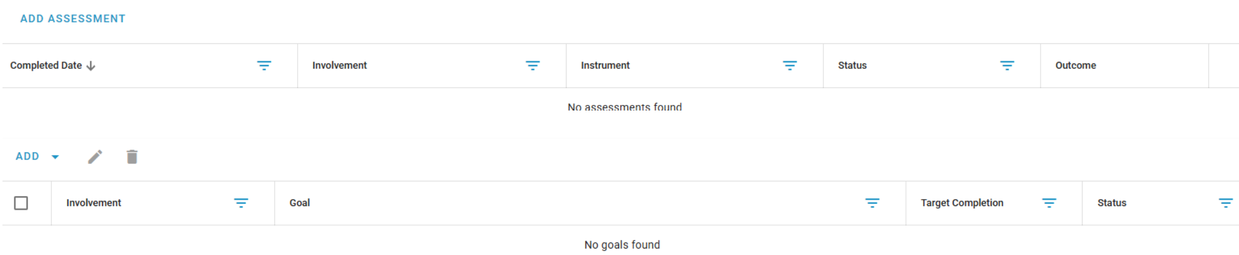
No Legal History found

Recidivism: Assists with building a list of offenses for reporting and tracking recidivism. These data elements are **optional**.

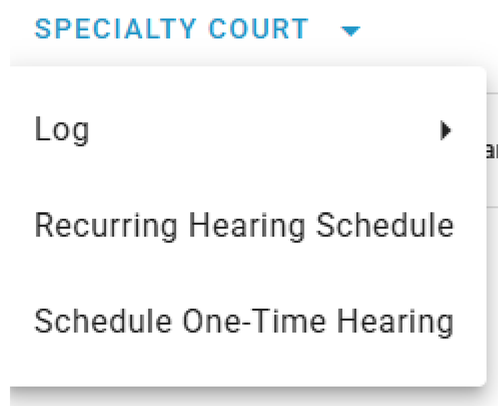


Assessment and Goals

Assessments help capture information about a client that can help with determining how to best meet the client's needs. Assessments are usually completed during the referral or intake process. Additional assessments can be completed in the future. Goals can be used a tool to assess a client's progress. These data elements are **optional**.



Hearings



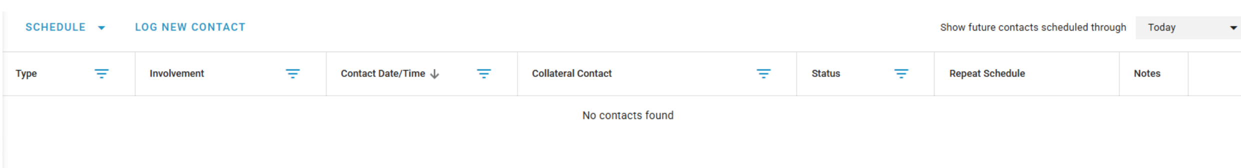
Schedule a one-time hearing, create a recurring hearing schedule or log completed, missed, or excused hearings. There is also an option to display future hearings through the next 30 days or a specified date. Logging hearings are important as client hearing attendance is correlated with their program success. These data elements are **required**.

Supervision

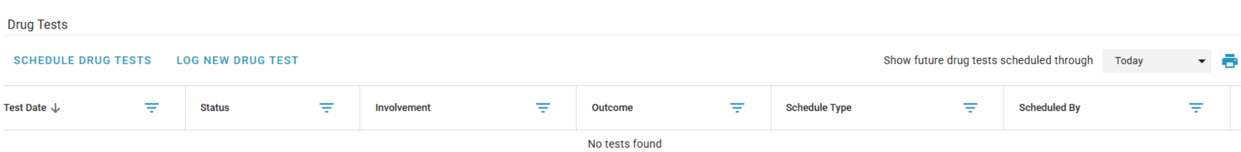
Supervision focuses on providing oversight and individualized support to clients as they work towards stability and long-term success. This includes monitoring compliance with court-ordered requirements, coordinating with treatment providers, and maintaining regular communication to track client progress. Effective supervision balances accountability with encouragement, ensuring that clients receive guidance, resources, and interventions they need to meet program goals and reduce recidivism.

Contacts: AIMS helps with scheduling and logging contacts with clients and AIMS displays whether these contacts have been completed, missed, or excused. Schedule or log contacts. These data elements are **required**. Contact types include:

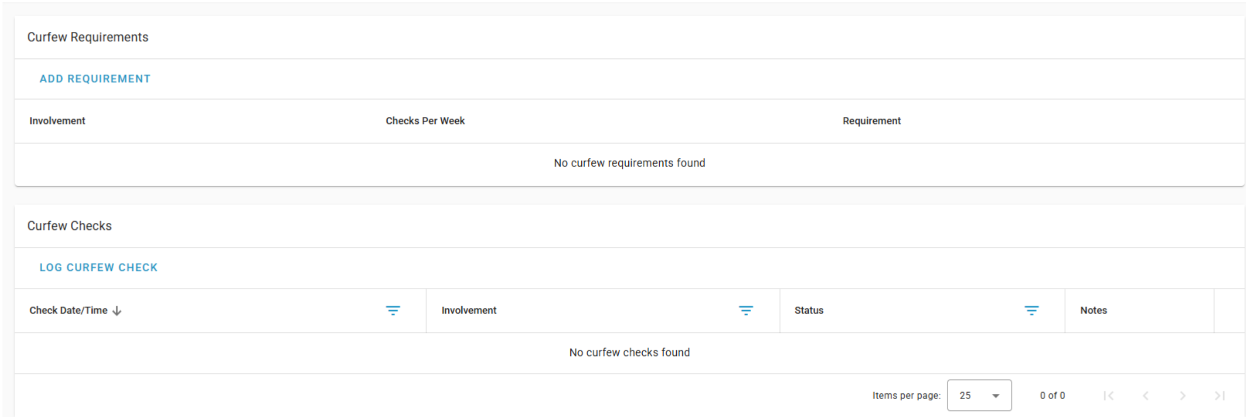
- Case Review
- Home visit
- Community
- Employment
- Face to Face
- FTR
- Non-Reporter Intake
- Notes to File
- Office
- Phone
- Special Conditions Verification
- Text Message
- Telephone Contact
- Unknown
- Video Conferencing
- Written/Email



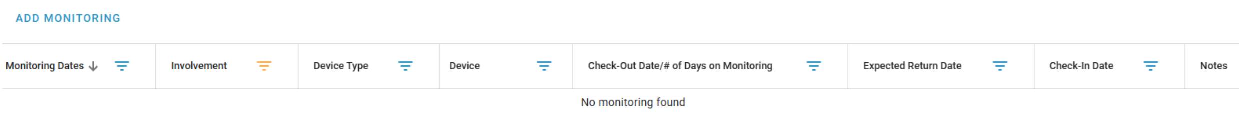
Drug Testing: Schedule and log unscheduled drug tests, finalize drug tests with data integration, and use automated voice greetings for drug tests. In some program types, randomized drug testing of clients is vital for client accountability and to ensure clients are intentionally working towards graduation. These data elements are **required**, **if applicable to your program and funded by the Judiciary**, if not, it is **preferred**.



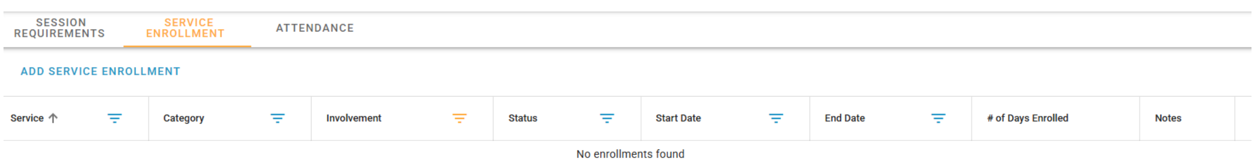
Curfew: Add curfew requirements and log curfew checks. These data elements are **required** if it **comes at a cost to your program (funded by the Judiciary)**, if not, these data elements are **preferred**.



Electronic Monitoring: Add electronic monitoring such as ankle bracelet or interlock. These data elements are **required** if it comes at **cost to your program (funded by the Judiciary)**, if not, it is **preferred**.



Treatment/Education: Enter service enrollments, add service requirements, and log service attendance. Service enrollment is a **required** data element. Attendance[2] information is a **preferred** data element, while session requirements are **optional** data elements.



Other Services: Enter any other services or referrals that you provide to clients. These are **required** data elements, and include:

- Assessments/screening services
- Childcare assistance
- Clothing
- Community-based support programs

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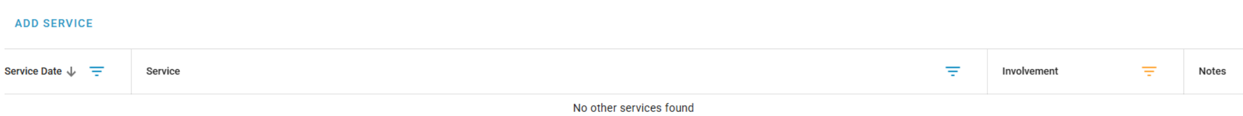
[2] Starting in FY 2027 (July 1, 2026), **attendance** will be required to be logged into AIMS, if funded by Judiciary.

- Domestic violence services
- Educational support
- Employment services
- Financial Literacy Services
- Food Assistance
- Government-Based Support Programs
- Health/Dental Services
- Housing Assistance
- Legal
- Legal Assistance
- Other
- Parenting Classes
- Participant Resource
- Phones/Phone Card
- Pro-Social Activity Referral
- Resource Fair
- Supervised Visitation
- Support Groups
- Transportation Assistance
- Utility Assistance
- Vital Records Assistance

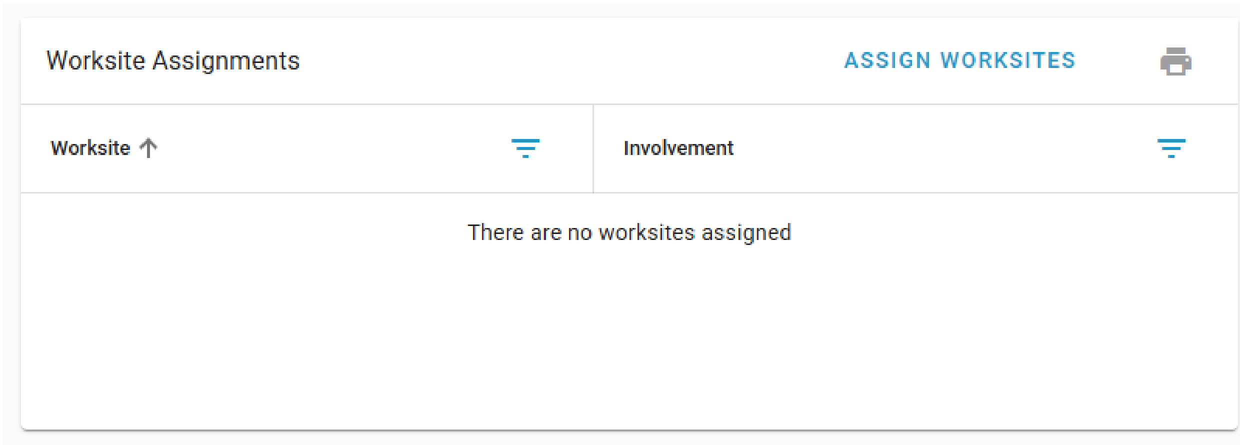


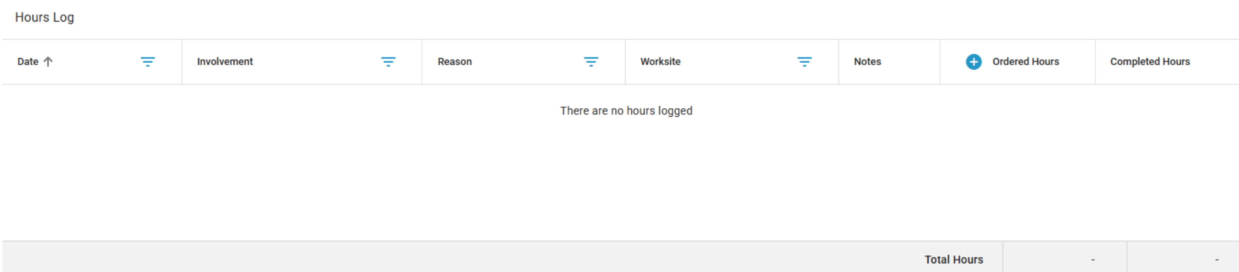
Accounting

AIMS helps with tracking clients' financial obligations, charges, and payments. AIMS does not process payments, but this section can serve as a ledger to keep track of financial transactions. Financial obligations and payments are **optional** data elements.

Community Service

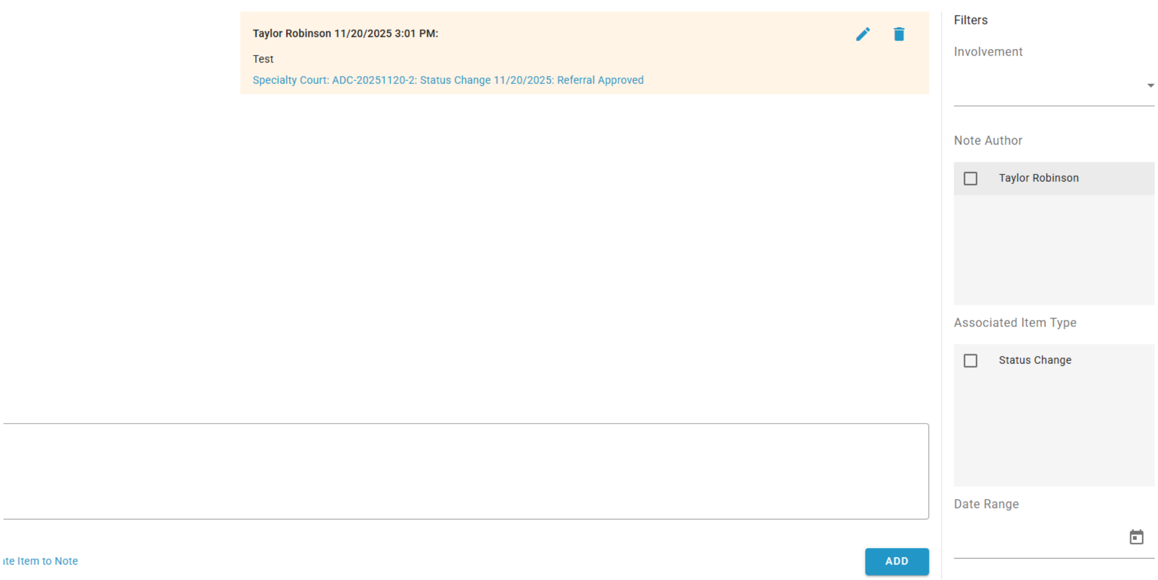
For community service, you can assign worksites to clients, view community service progress and details, manage worksite assignments, enter ordered hours, and enter completed or incentive hours. These data elements are **required**, if ordered.





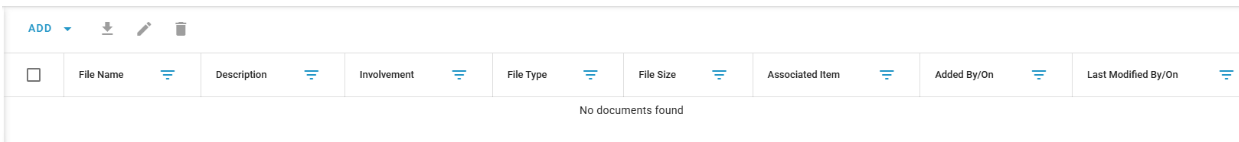
Notes

Any additional notes that are **required** data elements. Some notes populate automatically. For example, when a referral is approved, a note will automatically populate in this section.



Documents & Forms

Any document that is generated or collected during the course of case management is a **required** data element to be uploaded. For example, anything that would have been put in a paper file.

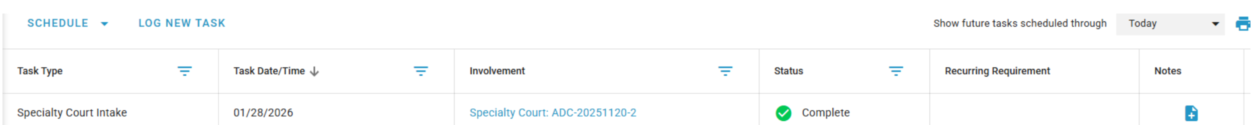


Reminders

Automated reminders are available to notify clients of upcoming or missed requirements, such as upcoming hearings or contacts, if they missed a contact or hearing, or if they have been selected for drug testing. These reminders are editable and administered by your program's local administrator.

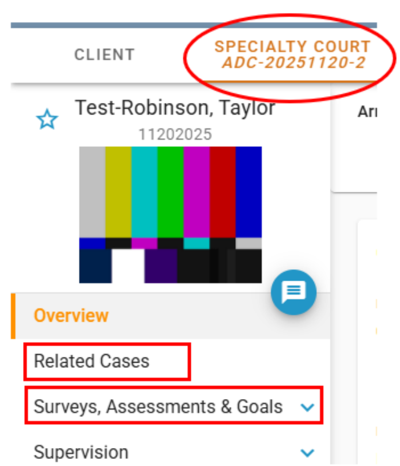
Tasks

Tasks are work items that you or other staff complete for a client. Think of it as a "to-do" list. This data element is **optional**, with some information automatically populating like completing a client intake.



Client Specialty Court Data

Next to the "Client Tab" is the Specialty Court Tab which has additional information such as related cases and surveys, assessments, and goals.
All of these data elements are **optional**.



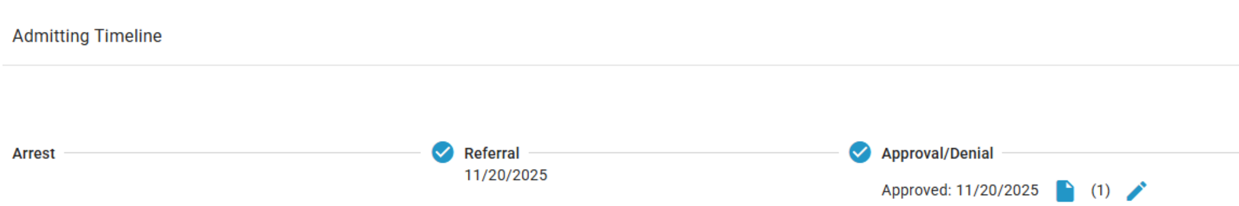
ADD RELATED CASE

Case #	Opened Date ↓	MSO Charge	Jurisdiction	Disposition	Disposition Date
No cases found					

Completing Client Intake

Once all client information has been entered, a referral date is entered when an involvement is created. After the referral date, you have the option to either approve or deny this referral. It is important to **NOT** click "COMPLETE" (admitting a client into the program) on a client **UNTIL** the client is officially in the program. If you admit a client before they have officially started program, and the client doesn't start the program, this will count as an incorrect termination. Clients admitted into the program prematurely can result in inaccurate counts of participants within the program.

Best practice is to schedule a one-time hearing and schedule intake. Once a client officially starts the program and is active in the program you may then COMPLETE the client profile to admit them into AIMS.



Cheat Sheet: Client Data Entry Requirements

CLIENT INFO

Personal Info

Required	Preferred (Optional)	Bonus (If Available)
Name (First, Middle, Last) Date of Birth Sex Race Hispanic Origin Primary Language English Speaking State of Residence	Aliases Drivers License # Drivers License State State ID State ID State SSN* FBI Number Criminal History ID Marital Status	Pronouns Citizenship Status Country of Residence In State Since Place of Birth

* Veterans Treatment Courts may be required to produce.

Contact Info

Required	Preferred	Bonus
Living Situation Phone Number Email Address		Other Contact Addresses

Employment/Financials

Required	Preferred	Bonus
	Employment Details	Other Income Sources Assets/Liabilities

Education

Required	Preferred	Bonus
Education		

Military Service

Required	Preferred	Bonus
Military Service		

Clinical Info

Required	Preferred	Bonus
	Diagnoses Prescriptions	Insurance Information Pregnancy

Drug Use

Required	Preferred	Bonus
	Drug Use	

Family

Required	Preferred	Bonus
Family		

- Minimal requirement of entry of who they live with and/or emergency contact.

Associates

Required	Preferred	Bonus
Associates		

- Minimal requirement of entry of involved service providers and their contact info.

TANF Details

Required	Preferred	Bonus

		TANF Details

Disclosures

Required	Preferred	Bonus
		Disclosures

Legal History

Required	Preferred	Bonus
		Legal History

Recidivism

Required	Preferred	Bonus
		Recidivism

ASSESSMENTS & GOALS

Assessments

Required	Preferred	Bonus
		Assessments

Goals

Required	Preferred	Bonus
		Goals

HEARINGS

Hearings

Required	Preferred	Bonus
Hearings		

SUPERVISION

Contacts

Required	Preferred	Bonus
Contacts (All)		

Drug Testing

Required	Preferred	Bonus
Drug Test		

* Required if coming at a cost to the program.

Curfew

Required	Preferred	Bonus
Curfew Requirements* Curfew Checks*		

* Required if coming at a cost to the program.

Electronic Monitoring

Required	Preferred	Bonus
Electronic Monitoring		

* Required if coming at a cost to the program.

Treatment/Education

Required	Preferred	Bonus
Service Enrollment	*Attendance	Session Requirements

*Starting July 1, 2026 (FY 2027), Attendance will be required to be logged into AIMS

Other Services

Required	Preferred	Bonus
Service/Referrals		

ACCOUNTING

Obligations

Required	Preferred	Bonus
		Obligations (if applicable)

Payments

Required	Preferred	Bonus
		Payments (if applicable)

COMMUNITY SERVICE

Community Service

Required	Preferred	Bonus
Community Service		

NOTES

Notes

Required	Preferred	Bonus
Notes (if not populated by another screen)		

DOCUMENTS & FORMS

Documents & Forms

Required	Preferred	Bonus
Any document that is generated or collected in the course of case management. (For the OGs, anything you would have put in the paper file.)		

REMINDERS

Reminders – NO ENTRY OCCURS HERE

Required	Preferred	Bonus

TASKS

Tasks

Required	Preferred	Bonus
		Tasks

ACTIVITY LOG

Activity Log – NO ENTRY OCCURS HERE

Required	Preferred	Bonus

RELATED CASES

Related Cases

Required	Preferred	Bonus
		Related Cases

SURVEYS, ASSESSMENTS & GOALS

Related Cases

Required	Preferred	Bonus
		Surveys Assessments Goals

For more information or questions, please contact Taylor Robinson, Ph.D., PSC Senior Researcher at 410-260-1090 or taylor.robinson@mdcourts.gov