Wyoming State Unit on Aging Guide to Mon Ami

March 17th, 2026

Mon Ami Definitions for Wyoming

Below we define some Mon Ami terminology to provide clarity during training of database knowledge and skills

User Roles

In Mon Ami, users can be assigned a few different roles that give them special permissions:

- Case Manager: Users with the case manager role in Mon Ami can be assigned as a client's primary case manager, sign service authorizations, and sign care plans.
- Assigned Staff: Users with the assigned admin role in Mon Ami can be assigned as a client's primary admin for non-case management programs.

There are three other permission types: program-based permissions, site-based permissions, and individual permissions for specific actions. The features you have access to are based on the permissions set for you by your State System Administrator.

Other Useful Vocabulary

- Provider: All service units recorded in Mon Ami must have a "provider" that completed that service. A provider could be a senior center, an external agency, or an individual depending on the type of service and how the provider should be identified in reports.
- Site: A site is a sub-organization within the State Unit on Aging, such as a senior center. Administrators that are part of a site can use most of the tools available in the system, but only have access to the subset of clients and other data that have been tagged with their site. Administrators and clients are allowed to belong to more than one site if needed.
- Care Plan: A care plan in Mon Ami holds important information about a client and the services they should be receiving from external providers under a given program to meet their assessed needs. This includes service authorizations, an emergency contact, the care recipient for caregiver programs, and a case manager's signature.
- Service Authorization: A service authorization is a request for service that indicates the client authorized to receive services, a service type, the number of units authorized, the frequency of the service that is needed, the funding source that will be used, and the unit cost if applicable. Service authorizations for a client within a particular program are grouped together on a care plan in Mon Ami. Service Authorizations can be sent to external providers or used internally.

- Service Definition: The name of a specific service that is offered by your program. Examples would be Personal Care and Assisted Transportation.
- Service Record: Service Records are how units of service are recorded in Mon Ami. A service record includes a date, service type, recipient (usually a specific client), number of units, funding source, provider, and program. Many reports are based on Service Records.
- Slates: Slates are lists of clients used to report services in Grids. When a client is in a slate they are called a member. Slates can also be created for Caregiver - Care Recipient pairs so that both individuals are members of the Slate. Slates can be generated manually by selecting which clients you want on the slate or dynamically via a service record query.
- Grids: The Grid functions like a spreadsheet with rows for each client, service and funding source combination and columns for each day of the month where you can enter the units of service a client received on any given day.
- Service Record Generator: This tool allows you to report services for any program that you manage. You are able to report services for a specific client or aggregate service group for any given day and amount of services. Multiple clients can be reported at a time, but only for one service type.
- Recipient Group: A recipient group represents a subset of clients who receive services anonymously. These groups are used for reporting aggregate service numbers. See the Service Definition Dictionary for program specific recipient group names.
- Document Template: A document template is a placeholder for various documents that will be uploaded to the client profile. The template helps to standardize the naming of uploaded documents and facilitate reporting. Please DO NOT create your own Document Template Name.
- Program Enrollment: A program enrollment is how to demonstrate a client's status within a specific program. The program enrollment will document the date that a client has been waitlisted, activated, stopped or other statuses for the program. Other information contained within the program enrollment includes the Case Manager or Assigned Staff for the client, the program score and funding source.
- Care Relationship: A care relationship is used to show the relationship between Caregivers and Care Recipients in Mon Ami. Both individuals need to have a client profile in Mon Ami to create the relationship. The relationship is created on the client profile of either individual in the Contacts section.

Updated AGNES Policy

The Aging Needs Evaluation Summary (AGNES) form is required annually for people receiving services through Title III and WyHS programs. The form contains three sections: “Basic Information”, “Nutrition Risk Screening”, and “ADL/IADL Screening”. Below are the policies and procedures for completing this form.

Initial AGNES

When a client first requests services, an initial AGNES form must be completed and entered in Mon Ami. If the client already has a profile in Mon Ami with a current completed AGNES form, but is new to the site, a new copy is not needed.

If the client is missing pages required for their program such as the ADL/IADL, they will need to fill out a new complete copy. If an AGNES is filled out and then the provider discovers that a form already exists on the client’s profile, they will create a new AGNES form with the most current information.

The form can be completed on paper first, but still must be entered into Mon Ami. When entering the form, set the expiration date to be one year from the completed date. ***No program or site should be set on the document in Mon Ami.***

Signature Policy for AGNES

First Time AGNES Completion for Client

When first completing the AGNES form, clients will be required to sign a Use of Information release statement as well as the rest of the AGNES form. This can be done on page 1 of the AGNES document or the Use of Information Release Form found in Mon Ami. This must be a physical signature and can not be digitally signed.

The signed copy must be uploaded to the client’s profile in Mon Ami under the Document Template named “Signed Information Release”. No program, site or expiration date should be set. The Date Completed should be set as the date the document was signed. The signature only needs to be obtained and uploaded once. A physical copy of the document does not need to be saved.

The amount of pages that the client initially will have to fill out depends on the programs and service that the client will be receiving. The image below is a guide on which pages of the AGNES the client will need to fill out depending on which program the client will be receiving services from:

Provider please complete: What programs will the participant be enrolled in?
❒ Title III-B (Complete 1st page) ❒ Title III-C1 (Complete 1st & 2nd page) ❒ Title III-C2 (Complete 1st, 2nd, & 3rd page)
❒ C1 Take Out Meals (Complete 1st & 2nd page) ❒ Title III-D (Complete 1st page) ❒ Title III-E (Complete 1st, 2nd, & 3rd page)
❒ WyHS (Complete 1st, 2nd, & 3rd page)

Renewal
Renewal of the AGNES should be completed one year from the most recently completed AGNES form. When completing the renewal, no program or site should be set. Set the expiration date to be one year from the completed date.

Below is a link to a guide on Electronic Signatures and their functions in Mon Ami:
Electronic Signature Guideline- Wyo Mon Ami (4).pdf

Tips for Filling Out the AGNES Form in Mon Ami
The digital copy of the AGNES form that you will fill out in Mon Ami is designed to mirror the paper copy that you are familiar with. However, there are a few minor differences that you will notice. Below are some pointers for helping you navigate these differences.

1. When adding the AGNES you will first see a dialog box with fields to enter Program, Site and Expiration Date information. For the AGNES form **only** enter the expiration date and leave the Program and Site fields blank.
2. The question *"Based on the intended program enrollments selected above, which of the following sections will be filled out for the client? (Check all that apply.) *"* exists on the digital form, but not on the paper copy. The purpose of this question is to ensure that you are only required to fill in the relevant sections of the AGNES. Please check the appropriate answers based on the programs the participant will be enrolled in.
3. Some demographic questions have additional options that are not present on the paper copy. For fields such as Gender and Preferred Language you can select the options that match the answers given on the paper copy. For the Race and Ethnicity questions please use this key for selecting the correct option

Paper Copy Answer	**Selection on Digital Form**
White, non-Hispanic	White
White-Hispanic	White ***and*** Other Hispanic, Latino or Spanish Origin
American Indian/Native Alaskan	American Indian Or Alaska Native

Asian or Asian American	Other Asian
Black/African American	Black Or African American
Native Hawaiian/Pacific Islander	Native Hawaiian
Other	Other Race
Hispanic or Latino (ethnicity)	Other Hispanic, Latino or Spanish Origin
Not Hispanic or Latino (ethnicity)	No selection necessary

Program Workflows

In this section we will document some of the standard operating procedures in Mon Ami. It will cover many of the main tasks involved in all programs.

New Client Intake

When you first receive a new client, you can search for them in Mon Ami using their name, phone number or email address. If they already exist in the system at another site you will see a limited view of their profile. You can then adopt the client to your site in order to begin delivering services.

It is very important that a thorough search is done for the client in the system before you add a new client to the system. It is imperative to reduce the risk of creating duplicate clients. If a client is accidentally added twice to the Mon Ami system then please contact your state administrator to merge the two duplicates together. You will want to send the following information to your system administrator if a merge needs to be completed: Correct full name of client, correct Date of Birth of client, both Mon Ami IDs of the two clients, and please indicate which profile needs to be the primary client and which one needs to be merged into the primary client profile.

Also, if multiple individuals with the same or similar names pop up in the search, it is important that you review each one and find the one that has the same date of birth and address as the client you are trying to find. This process will ensure that you do not enter Service Records to the incorrect individual. If necessary, complete the AGNES form according to the updated policy.

See articles:

- [How to create a new client]
- [How to create a new document]
- [How to adopt a client to a new site]

Program Enrollments

Program enrollments are a useful tool for managing program rosters, waitlists and client statuses. However, program enrollments are not necessary in order to record services for a client. Program enrollments are only required for clients in the III-E and WyHS programs.

Program enrollments have different statuses related to the client's standing in the program. This can be helpful for tracking a client's history in the program such as their start date. Also, program enrollments are necessary for creating and maintaining your waitlist in Mon Ami. Program Enrollment status is most important for care plan programs such as III-E NFCP, III-E ORC, and Wyoming Home Services. In these programs, the client needs a status of Active to begin the care plan creation process, but changing the status will not end the care plan automatically. Changing the end date will also be necessary to end the program enrollment if necessary. Below are the most common definitions of each status:

- Pending - the client is in the intake process awaiting eligibility confirmation
- Approved - the client is eligible, but has not begun receiving services
- Denied - the client is ineligible for services
- Active - the client is currently receiving services
- Stopped - the client has temporarily stopped receiving services or participating in the program
- Finished - the client has stopped receiving service or participating in the program on a permanent or long term basis
- Waitlist- the client has been deemed eligible for services but has to be placed on a waiting list until services are available

  See articles:
  - [How to manage a program enrollment]

Waitlists on Program Enrollment

Importance of Utilizing Waitlists in Mon Ami:

- Advocacy narrative- Waitlists are the state staff's primary mechanism for demonstrating the necessity of additional funding
- Tangible evidence- Data provides concrete proof of unmet need and the potential impact of expanded resources

- Required Utilization- All organizations should be using Mon Ami for waitlist management. Program policies require that the Mon Ami waitlist is utilized and updated monthly by end users of the database.

When entering a client on the waitlist, please ensure to add all Service Needs as well as the Funding Source on the Program Enrollment.

Waitlist Policy:
Each provider organization maintains data on participants who wish to receive services but are waitlisted due to a lack of resources. This data is accessible to the state unit on aging.

Procedure:
All provider organizations must use Mon Ami as the official system for managing their waitlist. If a provider organization is unable to provide services to clients for any reason, it is a requirement that the waitlist feature in Mon Ami is utilized and updated monthly by end users of the database, promptly when services are initiated, declined, or otherwise resolved. Local waitlist policies shall still be developed by the provider organization. The local waitlist policy should include at a minimum; eligibility criteria, the waitlist placement process, the method for determining the order of release from the waitlist, and how clients will be notified. Provider organizations must consider demographics and need scores of the client in Mon Ami when determining prioritization of clients on the waitlist. The greatest economic and social needs of clients shall also be considered when determining prioritization of clients on the waitlist.

When adding a client to the waitlist in Mon Ami, the data user must add a Program Enrollment to the client's profile with a Program Enrollment status of Waitlist. Within this Program Enrollment, the user shall also add the Client's Service Needs as well as the Eligible Funding Source to the designated section of the Program Enrollment for which the client is being waitlisted.

Additional Waitlist Resources and Trainings:

-Waitlist Training for Wyoming State Unit on Aging
-Waitlist Articles

Recording Services

Mon Ami has several tools to help sites report their services by the 15th of every month for the previous month. The main tool for reporting is the Slates and Grids. The Slate allows you to set up a list of relevant clients for a certain service or program. Grids allow you to attach service records to clients on a Slate and submit directly in the Mon Ami system. Slates and Grids should be used for reporting services for individuals.

The Service Record Generator is used primarily for Aggregate count services. In this method you can select all the relevant program, service, funding source and date connected to the service. This tool is best used for reporting aggregate numbers or small groups of people. If you are reporting unduplicated counts in this Service Record Generator tool please ensure that when you search for the Recipient, the Recipient you select is the correct profile that visits your organization and receives services from your organization. To ensure that the client is the correct client please double check the Mon Ami Client ID, the Date of Birth, and the Phone number that will show in the dropdown before selecting. This process will ensure accuracy of Service Reporting and will mitigate potential data cleanup.

Additional tools include the bulk uploader which may be used for providers who have data in the My Senior Center database or another external database. Case notes are another option for Service Record entry which will be used for some III-E and WyHS services.

See Articles:

- Slates Overview
- Grids Overview
- Bulk Uploading Service Records
- How to add units to a case note
- How to report aggregate service counts
- Transfer of Data between MSC and Mon Ami

Reports

Reports in Mon Ami can be used for managing program operations and for reporting services to the State. Site managers will see a limited set of reports based on their site affiliations and permissions.

- Documents Due Report- this report is built to show you a list of clients that receive services from a site that have a document expiring in a specified month or that have never had a document entered into Mon Ami.
    - To view this report you will want to filter the month that the document expires in as well as the Provider. You can filter the Document Template Name as well if you are only wanting to view specific documents.

- Documents Due- this section of the report will show any individuals who have an expiring document in the filtered month. Please note that this section is based on expiration dates so if a Document is missing an expiration date, the client may not populate in the report even if they are due for an assessment.
- No Documents- this section of the report shows clients from your center that have recently received Service Records but do not have any documents in Mon Ami at all. This may clue you in to who needs to be reassessed or have their documents added to Mon Ami.

- Birthday Report
    - This report can be filtered by Provider and Client Birth Month to show Clients that receive services from a specific provider that have a birthday in a specific month. Please keep the filter for Clients Birth to "in month of year" and then just add the month to that pre-filter.
- End-User Service Record Summary Report
    - This report can be filtered on Provider, Service Record Delivered dates, Service Type, and Program to show an overview of units, clients, and recipients throughout a specified time period.
    - Count of All Recipients indicates a duplicated number of people served (this includes your aggregate count recipients)
    - Count of Clients indicates the unduplicated number of people served
    - The Total By Service Type section of the report can be utilized to see a breakdown of services by Service Type or if the Service Delivered Date is filtered to show multiple months, this section will depict the comparison of units and clients numbers between months. The bar chart shown visualizes the difference of units between months. Each color is a specific service type. You can hover over the colors to show more details
    - Total by Provider- this section lists the total units & clients of each Service Type for each site

III-E and WyHS Program Specific Workflows

Evaluations and Assessments

Caregiver and WyHS Forms will be entered into the digital copy or uploaded as a digital copy on the client's profile. Please see the list below for whether the forms are available as a digital fillable form in Mon Ami or if they can only be uploaded to the system. When creating these documents, set the relevant program, site and expiration date. A program and site will not be added to the Quarterly Reassessment form.

- Adult Nursing Delegation Assessment- Uploaded Form
- Change of Status/Service- Uploaded Form
- IIIE and WyHS Task Sheet- Fillable Form and Uploaded Form options
- Caregiver Evaluation- Fillable Form or upload to Caregiver Additional Doc Upload
- Caregiver Information- Fillable Form or upload to Caregiver Additional Doc Upload
- Caregiver Service Plan- Uploaded Form
- Nursing Delegation-Uploaded Form
- ORC Evaluation- Fillable Form or upload to Caregiver Additional Doc Upload
- ORC Information- Fillable Form or upload to Caregiver Additional Doc Upload
- Quarterly Reassessment- Fillable Form and Uploaded Form options
- WyHS Service Plan- Uploaded Form
- Income Verification Form- Uploaded Form
- Program Transfer Letter (if needed)- Uploaded Form
- Case Notes Upload
- Caregiver Additional Documents Upload
- WyHS Additional Documents Upload

WyHS participants must complete an Income Verification form and upload the form to the profile. Then set the contribution level in the "WyHS Sliding Fee Schedule" field on the client's profile. Click this link to see how to add the WyHS Sliding Fee Schedule Contribution Level to the Client Profile in Mon Ami:

WyHS Sliding Fee Schedule Contribution Level Entry.pdf

Please follow Title III-E and WyHS respective program policies regarding signatures and III-E and WyHS documentation in Mon Ami.

Mon Ami provides a place where agencies can fully obtain signatures for compliance electronically. Collective signatures of digital vs. physical documentation must follow the organization's local office decision.

Care Relationships

Caregivers receiving services from the III-E National Family Caregiver Program or Older Relative Caregiver Program must add a Care Relationship to the Contacts tab of the client. When adding a Care Relationship to the Profile, who the caregiver is and who the care recipient is must be identified as well as the caregiver's relationship to the care receiver must be selected.

Here is a helpful article on how to add the new Care Relationship to a profile:
Creating a New Caregiver/Care Receiver Relationship

Service Records
When adding Service Records for the III-E program, the Care Relationship must be indicated on every Service Record. *The Service Records for the III-E program must be entered under the Caregiver's profile. Please DO NOT add Service Records for the III-E program to the Care Recipient's profile.*

Care Plan Creation and management

Clients receiving services in the III-E and WyHS programs are required to have a Care Plan. *For III-E programs, Care plans should be created on the Caregiver's profile.* All Care Plans should be set to expire 12 months after the start. Create service authorizations only for services you expect the client to receive during their care plan.

Suspensions, Change of Status and Termination will all be documented on the Care Plan in Mon Ami. When these events happen, create a case note to document the reason and add a unit of Follow-Up Contact.

A Program Transfer Letter will be sent by providers to clients when needed. It will then be uploaded to the client profile including the program, site and date completed. Then set an end date for the client's Care Plan. If there is not a new provider taking over services, set the client's program enrollment to "Finished".

Service Definition Dictionary

Title III-B Support Services Policies

Title IIIB Support Services Appendix C- Categories of Services

Note: for aggregate services use the Recipient Group named III-B Aggregate Recipient (id:3632)

Service Definition	Unit Type
Health Education	Occurrence
Health Exercise	Activity
Health Treatment and Prevention	Occurrence

Clubs/Group Activities	Occurrence
Games	Activity
Crafts	Occurrence
Shoppings	Per round trip
Chores	1 hour
Education/Trainings	Session
Counseling	Occurrence
Crisis Intervention	Occurrence
Information and Assistance/ Outreaches	Per contact (aggregate)
Nutrition Counseling Referral	Contact
Newsletter	1 unit, # of consumers (aggregate)
Social Media	# of posts, # of consumers (aggregate)
Volunteering	1 Hour
Transportations	1-way trip
Assisted Transportations	1-way trip

Title III-C1 Congregate Nutrition Policies

Note: for aggregate services use the Recipient Group named III-C1 Aggregate Recipient (id:3633)

Service Definition	Unit Type
Breakfast	Meal
Lunch	Meal
Evening	Meal
Frozen	Meal
Volunteer Meal	Meal (aggregate)
C1 No AGNES Meal	Meal (aggregate)
C1 Nutrition Education	Session (aggregate)
Nutrition Counseling	Session
C1 Emergency Meals	Meal
C1 Take Out Meals	Meal
C1 Take Out Nutrition Education	Session (aggregate)
C1 Take Out Nutrition Counseling	Session

Title III-C2 Home Delivered Nutrition Policies

Note: for aggregate services use the Recipient Group named III-C2 Aggregate Recipient (id:3634)

Service Definition	Unit Type
HDM Frozen Meal	Meal
HDM Hot Meal	Meal
HDM Volunteer Meal	Meal (aggregate)

Test Meal	Meal (aggregate)
C2 Nutrition Education	Session (aggregate)
Nutrition Counseling	Session
C2 Emergency Meals	Meal

Health Promotion Evidence Base III-D Policies

Service Definition	Unit Type
Bingocize	Session
Tai Chi	Session
CDSMP	Session

Title III-E National Family Caregiver Program Policies

Note: for aggregate services use the Recipient Group named III-E NFCP Aggregate Recipient (id:3636)

Service Definition	Unit Type
Assistance	Contact
Group Education	1 activity : Aggregate client count
Health Fairs	1 activity : Aggregate client count
Newsletters	1 activity : Aggregate client count
Public Education	1 activity : Aggregate client count
Outreach	1 activity : Aggregate client count
Initial Evaluation	Hourly
Follow-Up Contact	Hourly
Quarterly Evaluation	Hourly
Re-evaluation Renewal	Hourly
Nursing Medication Setup	Hourly
Nursing Assessment	Hourly
Nursing Delegation	Hourly
Nursing Reassessment	Hourly
Individual Counseling for Caregivers	Session
Caregiver Support Groups	Session
Training of Caregivers	Session
Loan Closet	Unit
Volunteers	Hourly
Care Plan Services (requires service authorization)	
In-Home Respite	Hourly
Adult Day Care Respite	Hourly

Assisted Living Respite	Hourly
Institutional Respite	Hourly
PERS Installation	Unit
PERS Monthly Service	Unit
Assisted Transportation	One way trip
Assistive Devices	Unit
Chore	Hourly
NFCP Meals	Meal
Homemaking services	Hourly
Incontinence Supplies	Occurrence
Minor Home Modifications	Occurrence
Personal Care	Hourly

Title III-E Older Relative Caregiver Policies

Note: for aggregate services use the Recipient Group named III-E ORC Aggregate Recipient (id:3637)

Service Definition	Unit Type
Assistance	Contact
Group Education	1 activity : Aggregate client count
Health Fairs	1 activity : Aggregate client count
Newsletters	1 activity : Aggregate client count
Public Education	1 activity : Aggregate client count
Outreach	1 activity : Aggregate client count
Initial Evaluation	Hourly
Follow-Up Contact	Hourly
Quarterly Evaluation	Hourly
Re-evaluation Renewal	Hourly
Individual Counseling for Caregivers	Session
Caregiver Support Groups	Session
Training of Caregivers	Session
Care Plan Services (requires service authorization)	
In-Home Respite	Hourly
Out of Home Respite	Hourly
PERS Installation	Unit
PERS Monthly Service	Unit
Assisted Transportation	One way trip
Assistive Devices	Unit
Chore	Hourly
ORC Home Delivered Meals	Meal

Homemaking services	Hourly
Incontinence Supplies	Occurrence
Minor Home Modifications	Occurrence
Personal Care	Hourly

Wyoming Home Services Policies

Service Definition	Unit Type
Initial Evaluation	Hourly
Follow-Up Contact	Hourly
Quarterly Evaluation	Hourly
Re-evaluation Renewal	Hourly
Nursing Delegation	Session
Nursing Reassessment	Session
Nursing Assessment	Session
Care Plan Services (requires service authorization)	
Personal Care	Hourly
Homemaker	Hourly
Chore	Hourly
In-Home Respite	Hourly
Assisted Living Respite	Hourly
Institutional Respite	Hourly
Adult Day Care/Health	Hourly
Hospice	Hourly
Home Modifications	Occurrence
Medication Setup	Hourly
Volunteer	Hourly
PERS Installation	Unit
PERS Monthly Service	Unit

Helpful Links

How to Videos

- ➔ System Overview
- ➔ How to: Managing the Waitlist
- ➔ How to: Care Plans and Service Authorization
- ➔ How to: Entering Case Notes
- ➔ How to: Document Management
- ➔ How to: Using Reports
- ➔ How to: Information & Referrals
- ➔ How to: Documenting and Reporting Services
    - ◆ Slates and Grids Training
    - ◆ Manual tool
    - ◆ Bulk Uploads

Recordings of Trainings

- III-B Program Overview, November 18 - https://youtu.be/rVFMK8Ys-oo

  Mon Ami Training: Overview-IIIB Program - 2024/11/1...

- III-C1/C2 Programs Overview, November 19 - https://youtu.be/B-gQvZLYXRw

  Mon Ami Training: Overview-C1/C2 Programs - 2024/11/19 13:37 MST - Recording

- IIIE & WyHS Programs Overview, November 20 - https://youtu.be/9ItVKE4HVIQ

  Mon Ami Training Overview- IIIE and WyHS Programs - 2024/11/20 13:36 MST - Record...

- IIID Program Overview, November 22 -

  Mon Ami Training Overview- IIID Program - 2024/11/22 08:44 MST - Recording

Recordings of Office Hours:

- System Basics, December 3rd-
  Mon Ami Office Hours: System Basics - 2024/12/03 13:40 MST - Recording

- Title IIIE and WyHS, December 4th-
  Mon Ami Office Hours: Title IIIE and WyHS - 2024/12/04 13:43 MST - Recording

- Reporting Services, December 11th-
    - Mon Ami Office Hours: Reporting Service - 2024/12/10 13:32 MST - Recording
- General Office Hours, December 19th-
    - Mon Ami General Office Hours - 2024/12/18 13:51 MST - Recording
- Office Hours, January 8th-
    - Mon Ami Office Hours Training - 2025/01/08 13:46 MST - Recording
- Office Hours, January 15th-
    - Mon Ami Office Hours Training - 2025/01/15 13:27 MST - Recording
- Office Hours, January 22nd-
    - Mon Ami Office Hours Training - 2025/01/22 13:44 MST - Recording
- Office Hours, February 5th-
    - Mon Ami Office Hours Training - 2025/02/05 13:49 MST - Recording

Recordings of Quarterly Data Meetings:

- Mon Ami Quarterly Meeting, March 27th-
    - Mon Ami Quarterly Meeting for Providers - 2025/03/27 13:41 MDT - Recording
- Mon Ami Quarterly Meeting, September 2025
    - Wyoming Mon Ami User Quarterly Call- September 2025 - 2025_09_18 13_30 MDT - Re...
- Mon Ami Quarterly Meeting, December 2025
    - Wyoming Mon Ami Data Quarterly Call - December 10th - 2025/12/10 13:33 MST - Reco...
- Mon Ami Quarterly Meeting, March 2026
    - Mon Ami Quarterly Call March 2026 Recording.mp4

Help Center Articles

These articles in the Help Center show step by step instructions for completing tasks in Mon Ami. The Help Center can be accessed by clicking "Help" on the left hand navigation menu in Mon Ami. Note that you will need to be logged in to use the links below.

- Clients
    - Creating a New Client Profile
    - Editing Client Profile Information
    - Changing a Client's Status
    - Adding or removing a site from a client's profile
    - Adopting a client
    - Creating a new caregiver/care receiver relationship
    - Adding a contact or caregiver relationship
- Program Enrollments
    - Adding a program enrollment
    - Editing and Ending a program enrollment
    - Adding assigned staff/case manager to Program Enrollment
    - Waitlist Overview
- Care Plans and Service Authorizations
    - How to create a new care plan
    - Ending a care plan early
    - Creating service authorizations
    - Editing the end date of service authorizations (suspending services)
    - Duplicating a care plan
    - Adding signatures to a care plan
    - Adding Service Options to a Service Authorization
- Case Notes
    - Creating a basic note
    - Creating a case note
    - Pinning a case note
    - Creating an incident note
- Documents
    - Creating and duplicating assessments
    - Uploading a document
- Reports
    - Download and print reports

- Smartlists
  - Slates Overview
  - Grids Overview

- Service Record Creation
  - For individuals and For aggregate groups
  - Bulk upload