TRAINING MANUAL

SAMS Training

Social Assistance Management System

Core SAMS Training
for End Users

Project SPURS

Department of Aging and Disability Services (DADS)

Version 2.0 FINAL

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Version Control:

Training Manual: Core SAMS Training for End Users

Version	Release Date	Changes and Comments
2.0	05/04/2010	Initial Release in FINAL format

Table of Contents

Introduction to Training Guide

This Education Services Training Guide was designed to help End Users develop foundational skills and to better understand how to effectively use Social Assistance Management Systems (SAMS™) software in social assistance programs administered under the State of Texas's Department of Aging and Disability Services (DADS).

The Guide is based upon SAMS software version 2.1 as of April 2010. Updates to the application after this date, and any custom configurations for your organization may not be reflected in this manual.

After your training, please report to your organization's AAA SAMS Administrator any questions about SAMS and any technical issues you may encounter. Your local AAA SAMS Administrator will assist you with most situations. As needed, this contact person can reach the Technical Support staff at Harmony to escalate issues that cannot be resolved locally.

This Training Guide contains detailed, step-by-step instructions on how to perform the tasks typically handled by SAMS End Users, although Users will need various features of the system depending on their job role(s). After training, this material can be used as needed for future reference.

During training, you are encouraged to ask any questions you may have. To develop skills learned in this training, you will need to access the system environment that has been configured for Test or Training use, and practice performing tasks using this Guide for reference. The DADS SAMS Administrators can assist you in obtaining access to a training or test site as appropriate.

We welcome your feedback about your SAMS training experience and this manual supporting your product education. Please don't hesitate to let us know where we can make improvements.

Your confidence in using SAMS for your assigned tasks will increase as you develop proficiency in the software. Take advantage of this training time, and continue to practice on your own in preparation for "going live" with SAMS. Soon, you won't know how you ever did without SAMS in performing your day-to-day activities.

Welcome to the Community of SAMS users!

About the Training Manual

Symbols

The following symbols are used in this document:

TIP

Tips provide general recommendations on how to make it easier or help you to be more productive in using SAMS.

CAUTION

Cautions highlight areas of note where special attention to detail may be important to your success with SAMS.

NOTE

Notes provide additional information of general interest about a specific function or process of the SAMS application.

Exercise

Exercises are provided to help you develop a better understanding of how SAMS may be used in a "real life" situation with various training scenarios.

Illustrations and Graphics

Screen shots provided in this manual may show a view or system configuration that is slightly different from those in use at your organization.

Scope of Documentation

This training manual provides information about specific system functions performed. It does not attempt to provide complete system information.

About the Course

Welcome to Harmony for Aging powered by SAMS! This training covers a variety of topics in using SAMS. During the course of this session, you'll learn more about:

- SAMS Consumer Records (page 12)

- Assessments (page 31)

- Care Planning with Service Plans (page 37)

- Journal Entries (page 47)

- Task Management using Activities and Dashboards (page 50)

- Service Deliveries (page 57)

- Rosters (page 63)

- Reports (page 68)

During training, you will be grouped with people having various job functions and duties, so some topics may be more relevant to your work than others.

The class will provide training that meets the needs of most users, so we may not deeply cover an area that could be especially helpful to you. If you have any questions about the training or the system and how it relates to your particular work role or situation, please let us know.

Have fun with the class and take time to practice the exercises. Don't hesitate to request more information. We are here to help you learn.

Getting Started with SAMS

Web-Based Technology

SAMS is a web-based application that is accessed from a Web browser, through Harmony's AgingNetwork.com portal. If you experience any problems during training or after going live, please coordinate with your SAMS System Administrator or training point of contact to evaluate the issue.

Before Your First Login

Prior to using AgingNetwork.com for the first time, your work station will need to be configured with a Citrix Web Client to allow connection to the application. This step will need to be completed on your assigned machine before your AAA's "Go Live."

NOTE
You may need to work with your IT department for this task if special permission (machine administrator rights) is needed to load new software on the machine(s).

First, go to www.agingnetwork.com, then click on "Go to Customer Login."
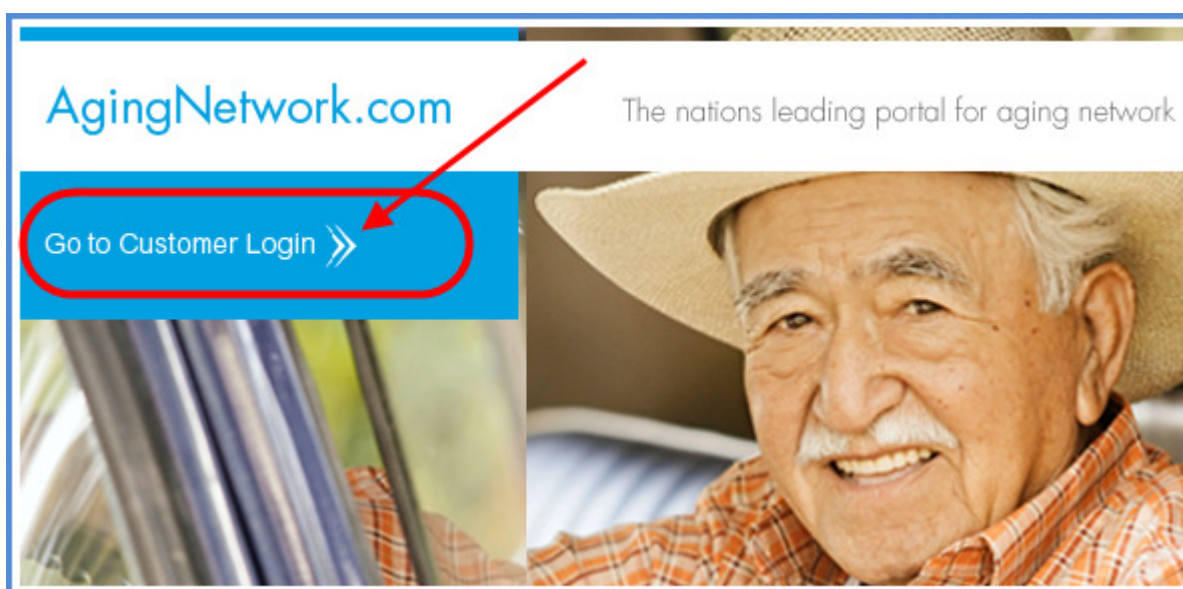
If you see the following message, click the link to install the client:

> The Message Center displays any informational or error messages that may occur.
>
> ⚠ You do not have the MetaFrame Presentation Server Client (ActiveX) for 32-bit Windows installed on your system. You must install the Client to launch the applications.
>
> Select the icon below to install the Client.
>
> 🔗 MetaFrame Presentation Server Client for 32-bit Windows ←
>
> Other Clients are available from the **Citrix Client download site**

Click on **Run** to install the Citrix ICA Client.

> **File Download - Security Warning**   ✕
>
> **Do you want to run or save this file?**
>
>   Name: ica32t.exe
>   Type: Application, 2.68MB
>   From: www.agingnetwork.com
>
>   [Run]   [Save]   [Cancel]
>
> ⚠ While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. What's the risk?
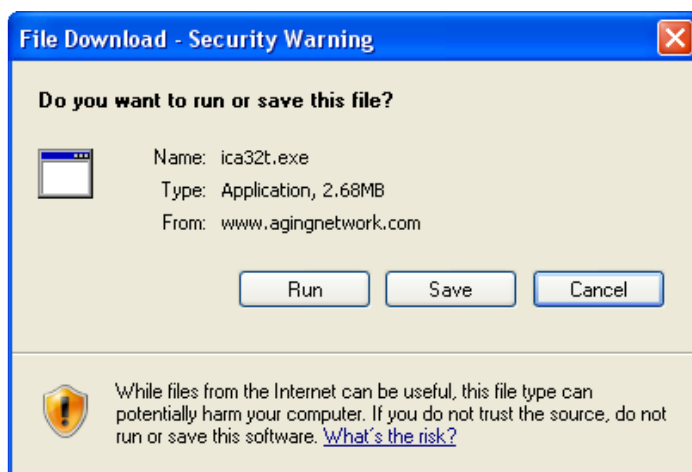
The client will download to the machine.

> **43% of ica32t.exe from www.agingnetwork....**   ☐ ☐ ✕
>
> ica32t.exe from www.agingnetwork.com
>
> ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮
>
> Estimated time left 4 sec (991KB of 2.68MB copied)
> Download to: Temporary Folder
> Transfer rate: 391KB/Sec
>
> ☐ Close this dialog box when download completes
>
>   [Open]   [Open Folder]   [Cancel]
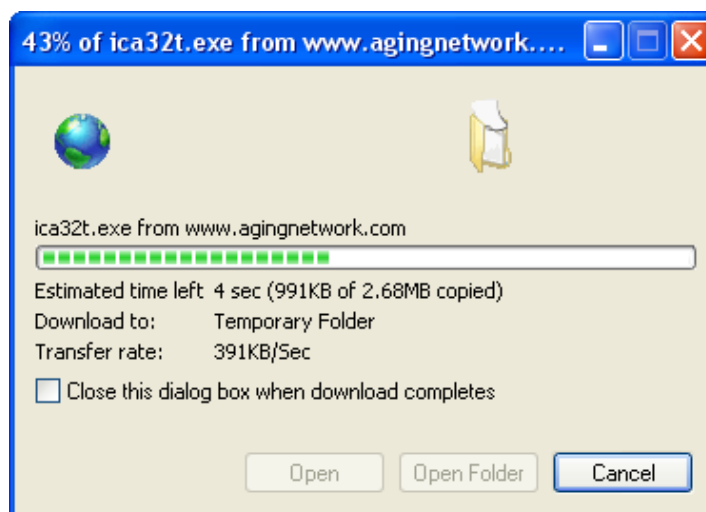
Click on **Run** one more time when prompted by the installer.

Then click **Yes** to complete the installation.
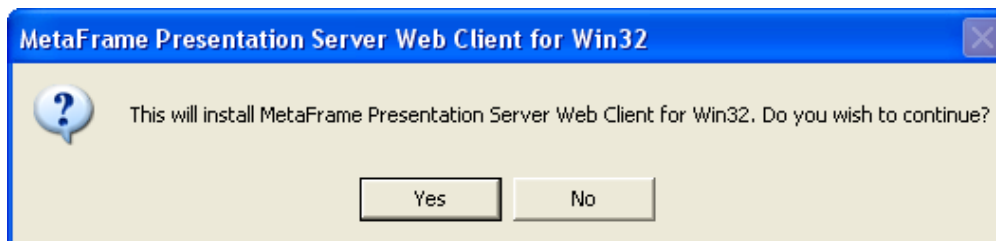
After successful installation of the client, close the web browser and repeat the steps to get to the login screen.

Enter your AgingNetwork.com login and password and click **Log In**.
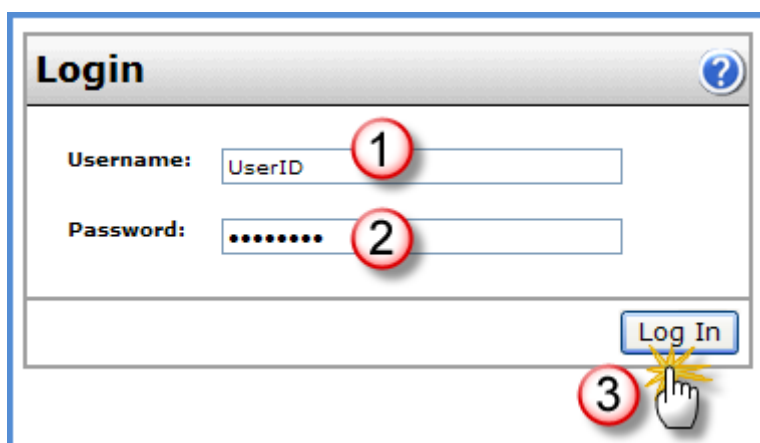
TIP

You may be prompted to change your password after you log in. If so, choose a secure password that you will be able to remember.

Signing In to SAMS

1. Launch **Internet Explorer**.
2. Go to http://www.agingnetwork.com.
3. Click **Go to Customer Login**.
4. Enter your assigned *AgingNetwork* **Username** and **Password**.
5. Click on the **Log In** button.
6. Click on the **SAMS Production** folder.
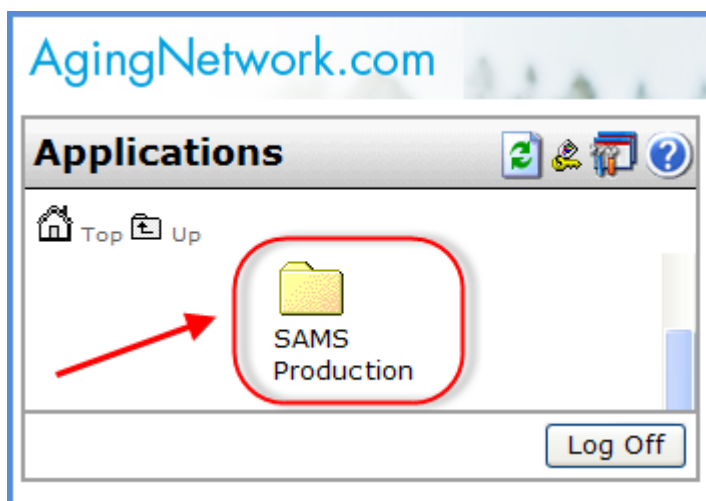
7. Click on the **SAMS** icon to start the application.
8. Enter your assign *SAMS* **Username** and **Password**.
9. Click **OK**.

NOTE

See next section. If you create a *desktop shortcut*, you'll be able to skip the first three steps outlined above. You'll just click an icon on your desktop and be taken directly to the AgingNetwork login screen.

Creating a Desktop Shortcut

1. Launch **Internet Explorer**.
2. Go to http://www.agingnetwork.com.
3. Click **Go to Customer Login**.
4. *Right click* in the body of the web page.
5. In the menu that appears, click on **Create Shortcut**.

When you go to your desktop, you will see an icon that looks like this:
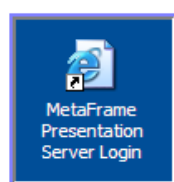
Click the shortcut to go straight to the login page.

Online Help

To access the SAMS User Guide for online help, press the **F1** key.

You can browse the Contents, look for a topic in the Index, and Search for a topic in the User Guide. Each section contains step-by-step instructions.

Main Feature Overview

SAMS Main Screen

In the SAMS application, the main screen has several sections, called "**Bars**".
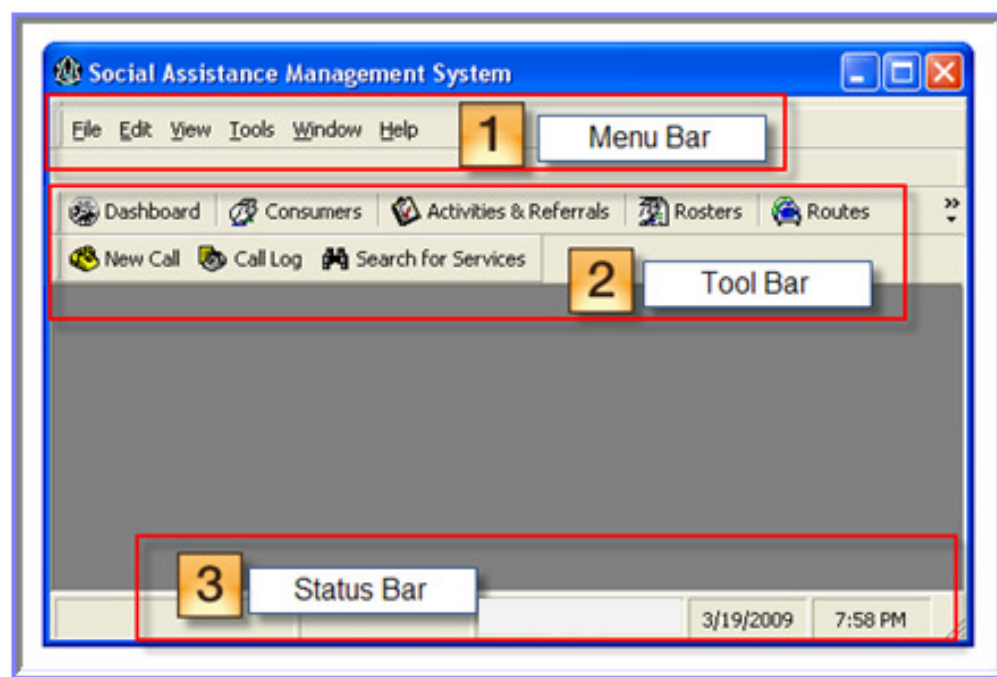
1. **Menu Bar** – This section contains menus for navigation and display options.

2. **Tool Bar** – These buttons launch the various functions within SAMS.

3. **Status Bar** – Confirms the user, database, date, and time. When doing a search, the system will also display the count of records returned within this section.

Navigation in SAMS

Accessing the various functions within SAMS is accomplished by clicking one of the buttons in the SAMS Tool Bar.

The SAMS application is designed for easy navigation. To access features and information in SAMS, select the buttons and menu options that take you where you wish to go.
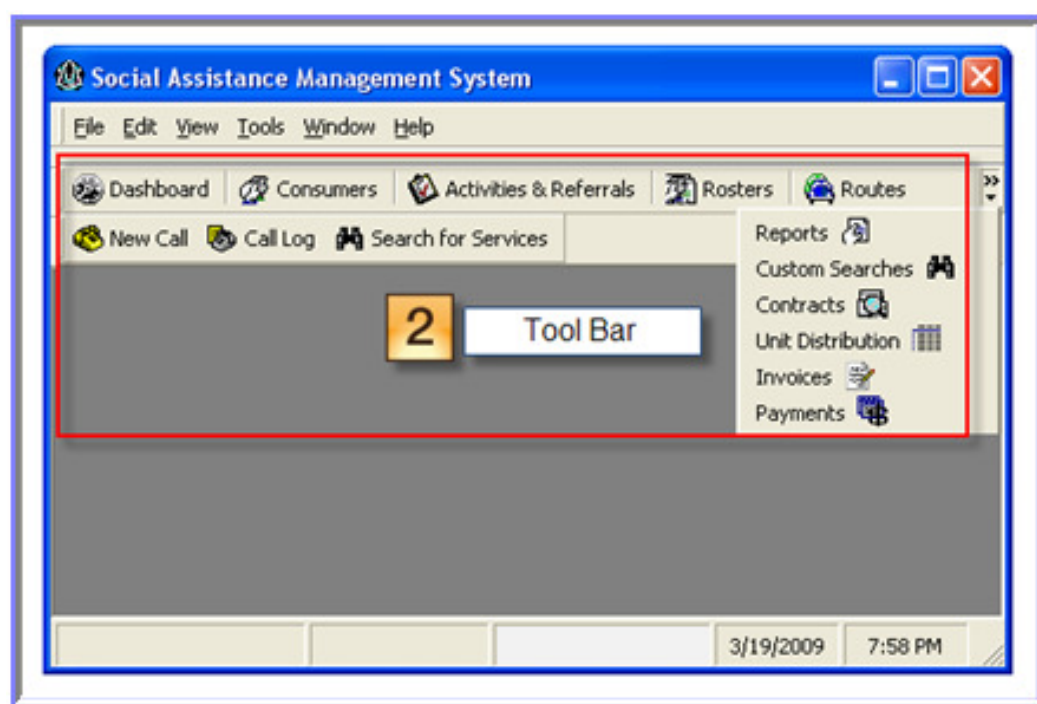
The buttons on the Tool Bar are labeled with names that describe the associated feature. Most of these labels, such as **Reports**, **Search**, **Contracts**, **New Call**, and **Activities & Referrals**, are self-explanatory. Your training class may not cover every available button.

In this training, we will focus primarily on the **Consumers** area of SAMS, which is accessed through the **Consumers** button. The Consumers area of SAMS helps you to locate the specific data and records you need by using simple yet extensive search capabilities. When you are not sure where you need to go, start in the Consumers area.

We will also explore **Rosters** for entering bulk service data, and **Reports** for generating service results.

List View Screens

In various areas of SAMS, records may appear on a **List View Screen** as shown below. **List View Screens** allow you to control the number of records returned at one time.
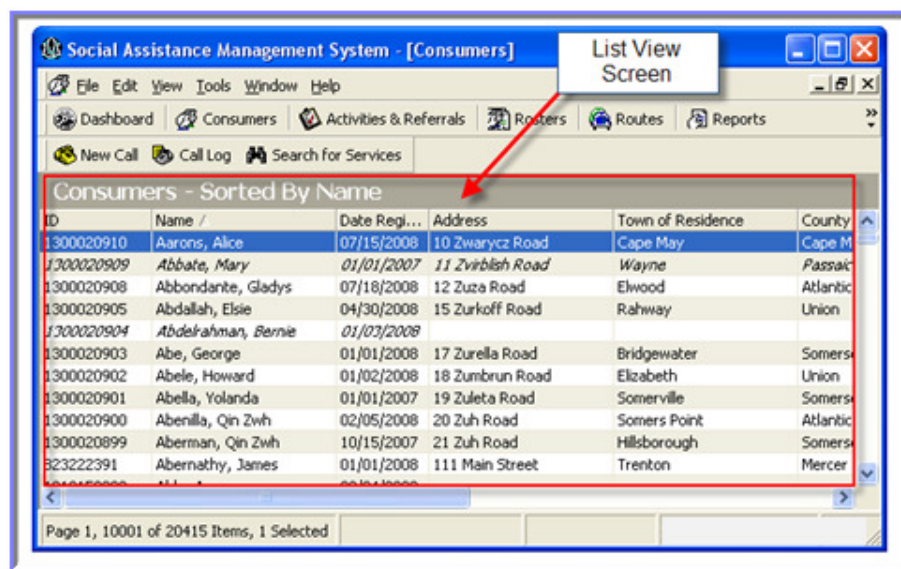
Note: You will only be able to see items that are permitted by security settings for your User ID.

When you go to the Consumers area of SAMS, the **Consumers List Screen** appears as a separate window within the main SAMS screen. The Consumers List Screen has its own Tool Bar as shown below. Use the screen controls at the uppermost right hand corner for the SAMS screen, and the controls below that for the Consumers List Screen.
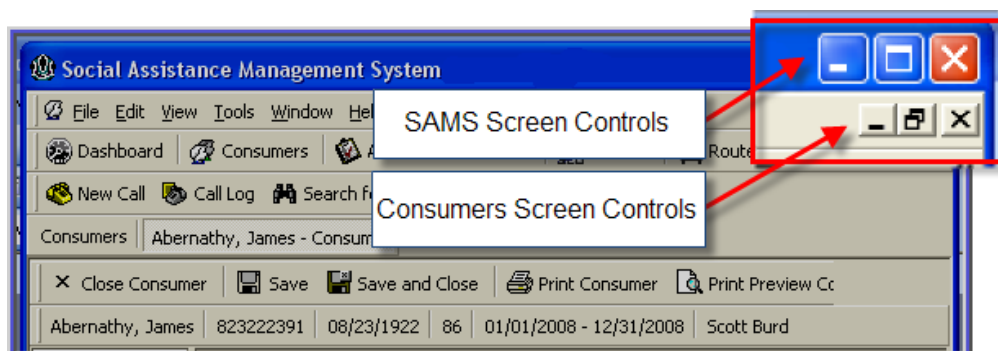
Consumers

The **Consumers** section is the largest and most comprehensive functional area of the SAMS application.

A SAMS ***Consumer*** is any person who receives services or assessments, or who may receive services or assessments. The ***Consumers*** area in SAMS is used to manage client demographics and service records, care plans, and consumer journals. The ***Consumers*** area also includes ***Consumer Groups***, which are sets of people receiving services as a unit where individual information about recipients is not captured or tracked. Consumer Groups are also known as "aggregate clients". In addition, SAMS tracks ***Caregivers*** as consumers who provide services to other consumers.

When you click ***Consumers*** on the Tool Bar, SAMS displays the **Consumers List Screen**. You can filter the list to view a smaller group of consumers. Filters enable you to sort the list, separate out certain kinds of records, and show records meeting a specific criteria such as date or location.

To change or access a **Consumer Record**, simply select the desired row and double-click the selection. SAMS displays the Consumer Summary and gives you access from there into the different areas of the selected record.

Accessing the Consumers Area

To open the Consumers area:

1. Locate the SAMS **Tool Bar**.

2. Click on the **Consumers** button.

SAMS will go to the database to obtain all available **Consumer Records**. This activity can take a few moments, especially when the database contains a large number of records.

> **Tip:** Within the **Consumers List Screen**, records that are *inactive or deactivated* appear in ***italics***.
>
> Records of **Caregivers** appear in **blue font** by default. (Users can change the setting to a different color if desired).

When you click on the Consumer button, the system will bring up the List View Screen of Consumers.

To bring up a specific **Consumer Record**, locate the desired row, and click the item to highlight it:

Then, double-click the selected item.

SAMS will bring up the record, showing the **Consumer Summary**:

Tip: A Consumer Record can also be accessed through the **Search Consumers** function in the top Tool Bar's **Edit** menu.

Going to **Edit > Search Consumers** will allow you to bypass pulling up the Consumer List.

Structure of Consumer Records

Consumer Records are divided into sections.

We will not cover all areas of the Consumer Record in this training.

The icons on the left (in a section called the Navigation Pane) are links that will take you directly to different parts of the selected Consumer Record.
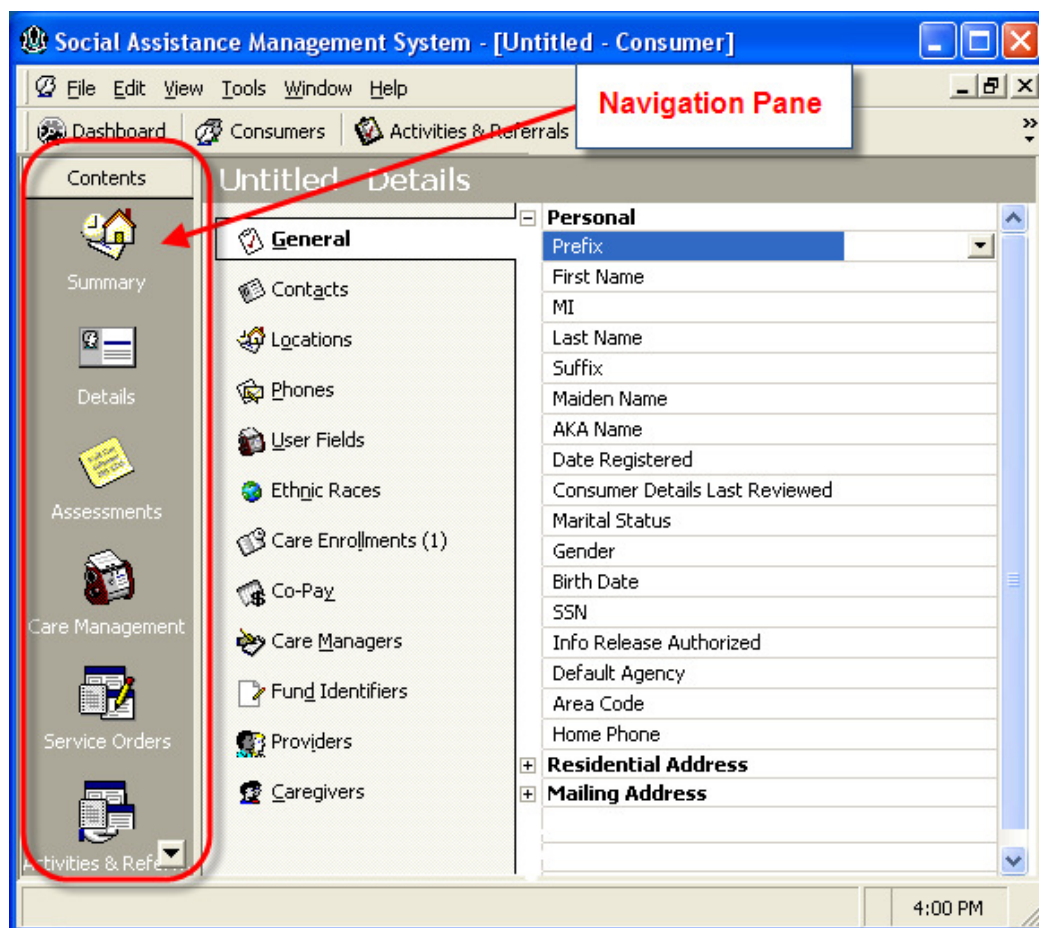
A description of each icon and section is provided below.

Summary – The Summary provides key consumer information, with hyperlinks to different areas of the Consumer Record.

Details – Details provide the Consumer's demographic and administrative information. There are many subsections of the Details area:

Consumer Record Details:

General - important demographic and administrative information, including NAPIS data, *Birth Date*, and *Social Security Numbers*.

Contacts - people related in some manner to the consumer, including the location and phone information for each contact.

Locations - address information, with additional fields such as *Directions* and *Municipality*.

Phones - phone and fax numbers.

User Fields – DADS-Specific consumer field (not used).

Ethnic Races – NAPIS standard racial profile for the consumer. NAPIS *Ethnicity* information is found in the *General* subsection.

Care Enrollments - a *Level of Care* and *Service Program* enrollment for a consumer.

Co-Pay - listing of co-pay indicators, to include starting and ending dates, co-pay amount, and co-pay type.

Care Managers - list of care managers for the consumer.

Fund Identifiers - list of sources such as NAPIS, State, Medicaid, etc, that may pay for service delivery.

Providers - providers who may supply services for a consumer. You can select a default provider for a consumer.

Caregivers - listing of consumers who have or might provide services to the consumer under a Caregiver Support Program.

Care Recipients - consumers who have received services from the consumer under a Caregiver Support Program.

Service Suspension - listing of any service exceptions for a specified time period by *Agency*, *Care Program*, *Provider*, *Service*, along with a *Reason.*

Assessments - data collection tools such as the *DADS Form 2060*.

Care Management - care plans with intended services, goals, journal, and a worksheet for assessing consumer needs. A *Care Plan* in *Care Management* contains these sub-sections:

> ***Summary*** - key information about a care plan for a consumer.
>
> ***Worksheet*** - consumer needs form (basis for care plan).
>
> ***Service Plan*** – service allocations for meeting consumer needs.
>
> ***Calendar*** – timing/frequency of services in the *Service Plan*.
>
> ***Goals*** – objectives for the care plan.
>
> ***Care Plan Journal*** – special journal, separated from the *Consumer* Journal, for documenting care plan information.
>
> ***Care Managers*** - identifies worker(s) associated with care plan.
>
> ***Diagnosis Codes*** - ICD-9 codes for electronic Medicaid billing.

Service Orders - service authorizations for planned services.

Service Delivery - records of care actually given to a consumer.

Activities & Referrals - records of activities and referrals for a consumer.

Consumer Journal – Area for logging information about a consumer.

Call History - historical list of a consumer's recorded contact sessions.

Billing - consumer invoice and payment history information.

Routes - listing of existing route lists that a consumer exists upon.

Attachments - attach created document files to the consumer record.

Creating Consumer Records

SAMS has two different methods of creating new consumer records. You can create consumers one at a time through the *Consumers* list screen using the *New* function, or by using consumer *Registration*. Before creating a new consumer, we will first review consumer duplication checking, Client IDs, keyboard data entry, and the process of consumer registration.

Duplicate Consumer Checking

There are many reasons why it's important to have only one record in the system for a particular Consumer. First, a single record enables better service by collecting all information over time in a central place, so that the Consumer's history is complete and accurate. Second, funding sources typically require unduplicated client counts in performance reporting, so it's a mandated requirement to count each Consumer only once in some situations.

To avoid duplicated records, you must always perform a consumer search before creating a new record. If the Consumer already exists in the system, update the existing record and do not create a duplicate. You are the "first line of defense".

In addition to the steps that you will take, SAMS has built-in checks to look for the possibility of duplicated consumers. The first check looks for existing records that match on the full 9-digit Social Security Number.

When any **5 of 7** special fields (Birth Date, Gender, First Name, Last Name, Primary Ethnic Race, Home Phone Number, and Residential Address) match an existing consumer record, SAMS will flag the new record as a potential duplicate: "**You are creating a Consumer which may already be registered.**"
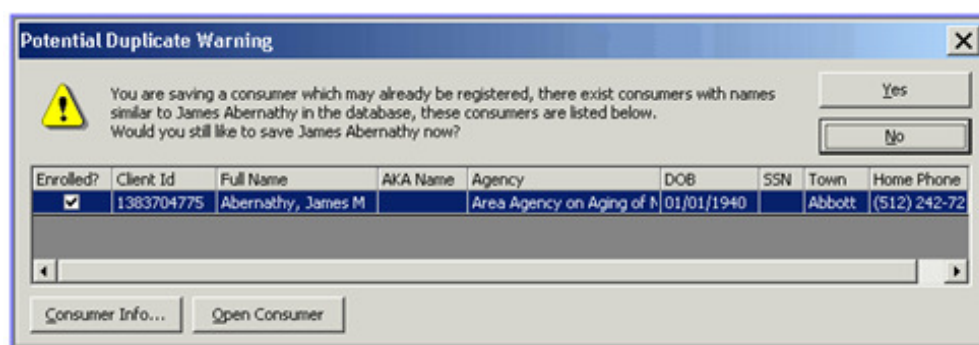
If a new record appears to match an existing consumer, SAMS will prompt you to make a decision. Review the potential match suggested by SAMS, and determine if you should save and create the new record you started, or discard it and use an existing matching record instead.

About Address Data Entry

SAMS filters lists in dropdown fields based on previous selections to make entering address information easier. For instance, if you know the *ZIP Code*, select just the *ZIP Code* field; *Town* and *State* automatically fill in. If you know the *Town*, select it after selecting a *State*. SAMS fills in the *ZIP Code* or displays only the list of valid *ZIP code*s for that *Town*.

Use the Keyboard

Using the keyboard methods will help to optimize the data entry process in SAMS. For example, to navigate in the *Details* section of the consumer record, use the UP and DOWN ARROW keys or the ENTER key to move between fields.

To edit fields where you choose from a list, highlight the field you want to change. You can also simply type the first letter of the item you want to select from the menu. For example, in a Yes/No/Don't Know list, press 'Y' to select "Yes," 'N' to select "No," and 'D' to select "Don't Know." Use the left and right arrows to scroll through options.

Adding Consumers

In this section, you will learn how to create new consumers. This Consumer will be used throughout the training. In a typical AAA, not all users are responsible for entering Consumers into the SAMS database, however, everyone should be aware of how records are created and the data contained in the system.

CAUTION

Please do not use real information for this exercise. Unlike the "Live" database, this is a practice database for non-confidential data that is open to many people.

To search for a consumer:

NOTE

The first step before entering *any* Consumer is to do a **Search** to ensure that they don't already exist in the database.

1. Click **Search** on the toolbar.

2. Enter the appropriate search criteria such as the consumer's *Name* or *Date of Birth*. Complete as many fields as possible to support the matching process. If a record is not found, SAMS will carry the data you entered into the new record if one is needed.

3. Click the **Find** button. SAMS displays matching consumer records at the bottom of the *Search Consumers* screen, or the system displays the Zero records found message shown below, which is your indication that creating a new record is the appropriate next step.

Social Assistance Management System

Zero records matched the specified search criteria.

OK
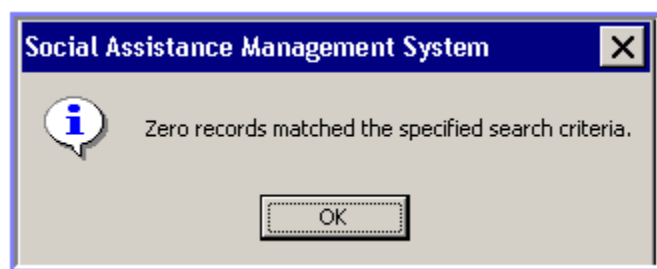
Entering a New Consumer using Register:

1. Click the **Register** button on the toolbar.

> **TIP**
> You can also open the *Register* window by clicking **Add New** in the *Search* window.

2. Enter appropriate detail information for your client in the *Personal* section.

3. Enter the *Date Registered* to reflect when the client entered the program. Make sure to backdate to encompass any past service deliveries received.

4. Choose the appropriate AAA as the *Default Agency*.

Register New Consumer		
Details		
☐ **Personal**		Next
Prefix		
First Name		OK
MI		
Last Name		Cancel
Suffix		
AKA Name		
Gender		
Birth Date		
SSN		
Area Code		
Home Phone		
Default Agency		
Default Provider		
Info Release Authorized	No	
Date Registered	01/01/2010	
☐ **Residential Address**		
☐ **Mailing Address**		
☐ **Care Enrollment**		
☐ **NAPIS**		
☐ **Characteristics**		

> **NOTE**
> All *County*, *Town*, and *Zip Code* location data in SAMS are controlled by associations made in the SAMS Administrative table setup. This controls the integrity of the data entry by only allowing valid selections in the dropdown lists.

5. Expand the sections to enter data for *Residential Address* and *Mailing Address*. As appropriate, enter *Directions To Home,* which can be displayed in a print out of a Route sheet.
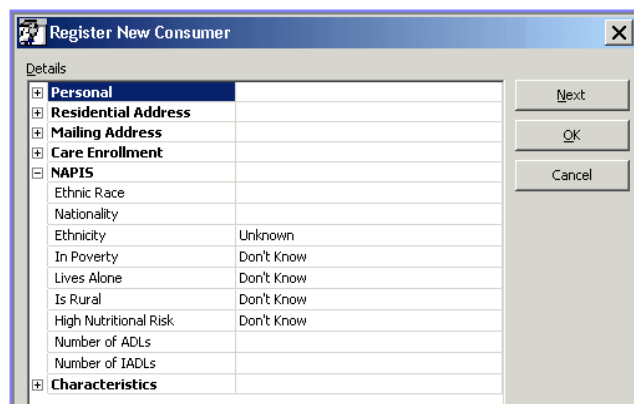

6. Expand the section to enter data for *Care Enrollment*. Select the *Level of Care* and *Service Program* to create the Care Program Enrollment.

NOTE

Each Consumer that is added to SAMS by default will be enrolled into the program set as a Default in the SAMS Administrative setup, which is currently set to **NAPIS All Funding Sources**.

7. Expand the *NAPIS* and *Characteristics* headings, and enter any additional demographics that are appropriate for the client.

NOTE

You must record all required data for NAPIS demographic data elements to enable accurate quarterly and annual state and federal reporting.

8. When finished entering data, click **OK**.

NOTE

SAMS requires only the consumer's *Last Name* to create a new record. Any other data requirements will be based on your organization's policy decisions. In general, you should enter as much information as you have about the consumer to support determination of eligibility and delivery of services.

Consumer Details

The Details section of the consumer record contains the demographic data and associations for a client. In the sections that follow, we will explore how to make various entries and associations.

To change General demographics:
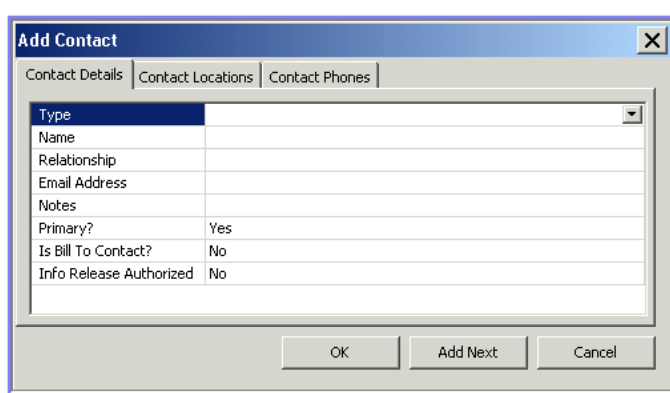
1. Open the Consumer record and click the **Details** button in the *Navigation* pane.

2. Click on the **General** section tab.

3. Make the appropriate changes to demographic fields and dropdowns.

4. Click **Save** on the toolbar.

Contacts

Contacts are people (other than caregivers, care recipients, or care managers) who have a relationship to the consumer. *Contacts* stores phone and address information for adult children, physicians, and billing addresses.

To create a new contact record:

1. From within the Consumer Details, click on the **Contacts** section tab.

2. Click **Add Contact** on the toolbar.

3. Select the **Type** of contact and enter the appropriate detail for the **Name**, **Relationship** and other fields on the *Details* tab.

4. Click on the *Contact Locations* and *Contact Phones* tabs to capture address and phone information for the contact being entered.

5. Click **OK** to create the contact record, or click **Add Next** to enter another contact record.

6. Click **Save** to commit the changes to the Consumer Record.

NOTE
SAMS displays the number of contacts next to the label on the *Contacts* tab.

Locations

SAMS stores address information in *Locations*. In addition to basic address fields, each location has fields to store the *Type* of address, *Neighborhood, Municipality,* and *Directions* information. A consumer has only one *Primary* location.

To create a new location:

1. From the Consumer Details, click on the **Locations** section tab.

2. Click **Add Location** on the toolbar.
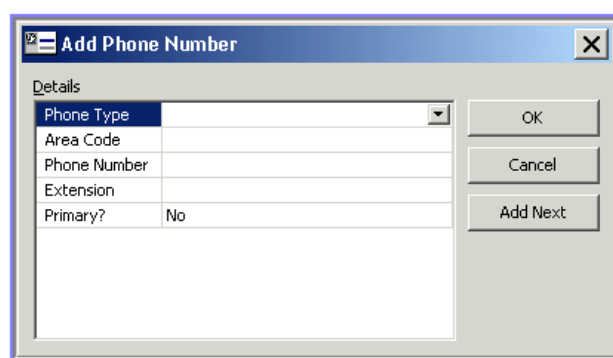
3. Select the **Type** of location and enter the appropriate detail for the **Street**, **County, Town, Zip Code** and other fields in the location record.

4. Click **OK** to create the location record, or click **Add Next** to enter another location record.

5. Click **Save** to commit the changes to the Consumer Record.

Phones

SAMS can track as many phone numbers as required for each consumer. Each phone number requires a selection of a *Phone Type*. Only one phone record can be marked as *Primary*.

To enter a phone number for a consumer:

1. From the Consumer Details, click on the **Phones** section tab.

2. Click **Add Phone** on the toolbar.
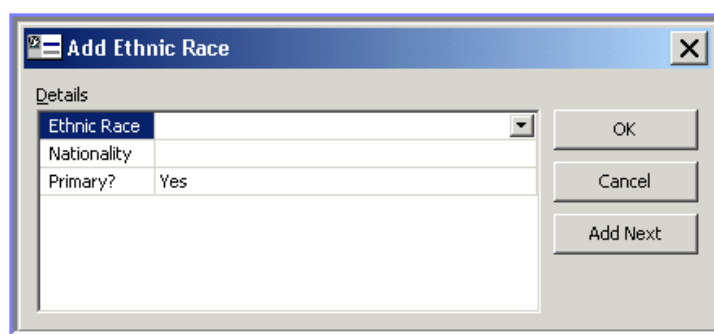
3. Select the **Phone Type** and enter the appropriate detail for the **Area Code**, **Phone Number,** and **Extension**.

4. Click **OK** to create the phone record, or click **Add Next** to enter another phone record.

5. Click **Save** to commit the changes to the Consumer Record.

Ethnic Races

SAMS allows for multiple Ethnic Race profiles to be tracked for each consumer. This attribute is a basis for federal reporting on standard Ethnic backgrounds.

To create a new ethnic race record:

1. From the Consumer Details, click on the **Ethnic Races** section tab.

2. Click **Add Ethnic Race** on the toolbar.

3. Select the appropriate **Ethnic Race.**

NOTE

An optional **Nationality** can be selected to further classify the client's background, but would need to first be set up in the SAMS Administrative table structure.

4. Click **OK** to create the ethnic race record, or click **Add Next** to enter another ethnic race.

5. Click **Save** to commit the changes to the Consumer Record.

Care Enrollments

Care enrollments are a vital part of the SAMS system. *Care Enrollments* determine the services consumers can receive within SAMS. Each care enrollment stores various dates plus the combination of *Level of Care* and *Service Program* that make up the **Care Program** enrollment for the Consumer.

NOTE

A default program is set up in the administrative structure to auto-enroll each client in the **NAPIS All Funding Sources** program.

To create a new care enrollment:
1. From the Consumer Details, click on the **Care Enrollments** section tab.
2. Click **Add Care Enrollment** on the toolbar.

3. Select the appropriate **Level of Care** and **Service Program.**

4. Set the **Start Date** to reflect the initial enrollment in the program, and set the **End Date** as necessary.

5. Click **OK** to create the care enrollment record, or click **Add Next** to enter another enrollment.

6. Click **Save** to commit the changes to the Consumer Record.

TIP
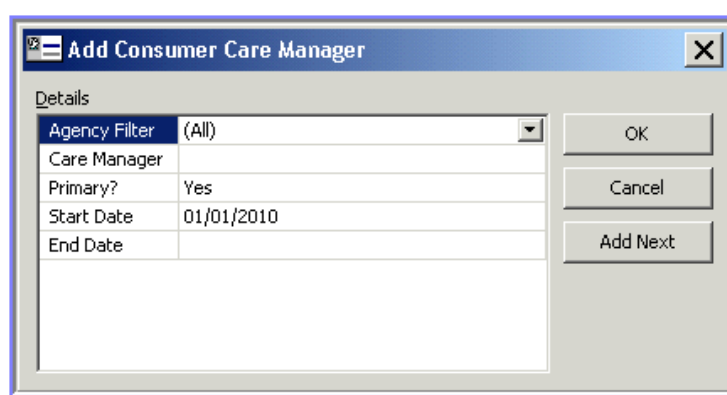
If the duration of the program enrollment is unknown, simply leave the **End Date** field blank.

Care Managers

SAMS can store associations between a consumer and any individuals responsible for maintaining the client's care. Each association is managed by Start and End Dates to retain the history of the consumer's affiliation with these individuals.

To associate a care manager to a consumer:

1. From the Consumer Details, click on the **Care Managers** section tab.

2. Click **Add Care Manager** on the toolbar.

3. Select the appropriate **Care Manager.**

TIP

An optional **Agency Filter** can be selected to limit the resulting list of Care Managers.

4. Click **OK** to create the care manager association, or click **Add Next** to enter another association.

5. Click **Save** to commit the changes to the Consumer Record.

Providers

Similar to the Care Manager associations, SAMS can also track affiliations to organizations that may provide services to a consumer.

To associate a provider to a consumer:

1. From the Consumer Details, click on the **Providers** section tab.

2. Click **Add Provider** on the toolbar.

3. Select the appropriate **Provider.**

4. Click **OK** to create the provider association, or click **Add Next** to enter another association.

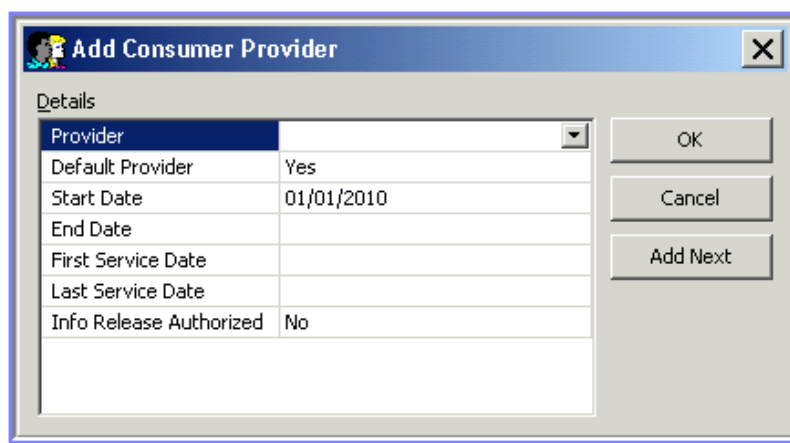5. Click **Save** to commit the changes to the Consumer Record.

NOTE

With an association to a Provider, SAMS will automatically read and display the **First Service Date** and **Last Service Date** entered as *Service Delivery* records.

Assessments

In SAMS, an assessment is an information collection tool for capturing point-in-time data in a question/response form. There are several different forms created in the SPURS system including the *DADS Form 2060*.

In the sections that follow, we will review the process of entering assessments into SAMS. SAMS can also pre-fill corresponding responses for a reassessment using any previous assessment session.

Assessments are designed in a separate module called Omnia Designer. If you identify a need to change a question or add new questions, please notify your SAMS System Administrator, who can consult with DADS to evaluate the request for modification or enhancement to the assessment(s).

Assessments in the SPURS system include:

- Intake Assessments
    - Client Intake
    - Nutrition Risk Assessment
    - DADS Form 2060
    - Caregiver Assessment

- State Health Insurance Program (SHIP) Assessments
    - Individual Client Contact (ICC Form)
    - Public and Media Event (PAM Form)

Assessments are completed by pulling up one of the tools and then entering client and response information to the applicable fields.

Indicators

In additions to standardized questions, many assessments also have *Indicators*, which are calculated formulas that automate scoring based on responses to the questions. Indicators prevent human errors in calculation and make it easy to report on important assessment data.

Creating New Assessment

Creating a new Assessment:

1. Click **Assessments** in the *Navigation* pane.

2. Click **New Assessment** on the toolbar.

3. Select in the *Filename* list.

> **NOTE**
> Once you've used a form, it appears in the *Filename* dropdown list, and you will not need to browse for the form again.

4. Select the appropriate form and click **OK** to start the assessment session.

5. Under the *Organization* header, select the appropriate **Agency,** and/or **Provider** performing the assessment.

6. In the *Assessment* section, enter the **Date of Assessment** to reflect when the assessment was performed, and set the **Next Assessment Date** if a reassessment is due.

7. Enter the name of the person who performed the assessment as the **Assessor**.

8. Click **OK**.

> **NOTE**
> If a form contains fields that can have multiple answers or responses (such as *Ethnicity*), SAMS will prompt you to Map the fields, either when opening the form, or when saving the form. Use the lists in *Assessment Response* to fill in the appropriate responses if desired.

Assessment Data Entry

The SAMS *Assessment Data Entry* screen has two main panes: the *assessment navigation* (on the left) and *data entry* panes (on the right). The program displays the sections and subsections of the assessment form in the *navigation* pane. The questions and fields for response appear on the right, in the *data entry* pane.

TIP

Using the keyboard will optimize assessment data entry. The *LEFT* and *RIGHT ARROW* keys scroll through possible question choices. *ENTER* or the *DOWN ARROW* moves you to the next question.

If you click **History**, **Notes**, or **Properties** on the toolbar, a *History* pane, *Notes* pane, and/or *Properties* pane appear at the bottom of the *Data Entry* window. To remove these panes from view, simply click the buttons once more.

- The **History** pane shows you the history of answers to a particular question, as long as consistent questions are used from form to form.

- The **Note** pan is available for you to put individual Notes on each question.

- The **Properties** pane will show you the Omnia Catalog question number for each question, along with some additional information about the question itself.

- The **Narrative** section appears at the very bottom of the *Navigation* pane, and may be used to make general notes.

Data Entry Pane

The following table outlines the visual icons to assist in the data entry of the assessment form session.

Reading the Assessment Icons:

Symbol	Meaning
	SAMS Icon: This field is a **linked** field, with a defined relationship to another field or question.
	Blue Dot with White Question Mark: This question is **answered**.
	White Dot with Blue Question Mark: This question is **not answered yet**.
	White Dot with Blue and Red Exclamations: This question **requires** an answer.
	Square with Bullet List: Symbol marks a **sub-section** of the assessment.

Assessment Form Toolbar

The *Assessment Form* toolbar switches between several parts of an assessment and accesses important functions. The following lists describe the functions of the buttons as they appear from left to right on the toolbar.

Top Row

- **Edit** - access to *Properties*. Includes *Assessor, Comment, Date of Assessment, Next Assessment Date,* and *Password* information.

- **Save** - save the assessment.

- **Save and Close** - save and close the assessment session.

- **Print** – go to print dialog box to print current assessment or form.

- **Collapse All** - compact view in *Navigation* pane: show only major sections or headings.

- **Expand All** - expand view in *Navigation* pane to show all sections.

- **History** - view a history of responses to the highlighted question.

- **Notes** - enter notes about the currently highlighted question.

- **Properties** - access additional information regarding a question, section, subsection, or indicator.

Second Row

- **Previous** - go to the previous question in the assessment.

- **Next** - go to the next question in the assessment.

- **First Unanswered Question** - jump to the first assessment question without a response.

- **Previous Unanswered Question** - jump to the first assessment question before the current one without a response.

- **Next Unanswered Question** - jump to the next assessment question without a response.

- **Find Question** - search for a question within the assessment.

- **Copy Response** - copy a previous assessment response from the *History* pane into the current response. This function is only available if the *History* pane is active.

- **Clear Response** - remove the information entered into the question.

- **Go to Narrative** - access the narrative section of the assessment.

- **Refresh** - re-create the screen with the newest information from the database.

Exercise

Follow along with your instructor to practice entry of a consumer record and assessment.

1. Search the database to see if your desired client exists.

2. Register a new consumer making sure to enter the following detail:
   a. First Name
   b. Last Name
   c. Date of Birth
   d. Gender
   e. Home Phone
   f. Default Agency
   g. Date Registered = *01/01/2010*
   h. Residential and Mailing Address
   i. Care Enrollment = *NAPIS All Funding Sources*

3. After creating the client, open the record and enter more of the following details for your client:
   a. Ethnic Race
   b. Contact with Phone
   c. Cell Phone
   d. Care Manager

4. Add a new *DADS Form 2060 Assessment*.
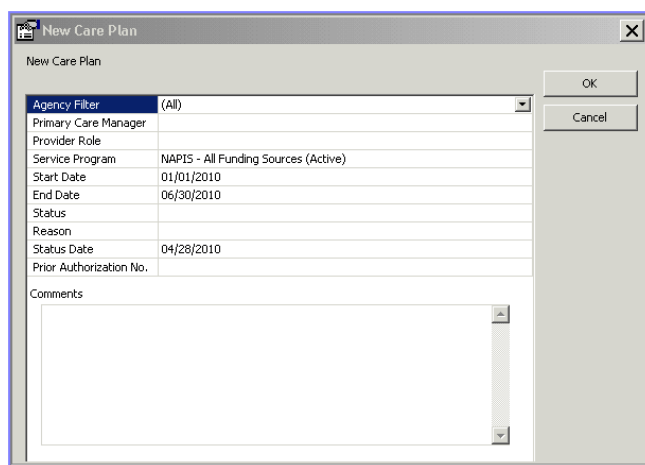
Care Planning in SAMS

Each consumer record contains a *Care Management* section for care planning. Care enrollments control the services that users can allocate through **Service Plans**, and ultimately deliver to consumers. Other functions are available in a Care Plan, such as a Worksheet, Calendar, Goals, Care Plan Journals, Care Managers, and Diagnosis Codes. This section will focus solely on the service allocations in the Service Plans.

SAMS maintains consumer Care Plans in separate records based on a required time period and Care Program.

Creating a new care plan:

1. Click **Care Management** in the *Navigation* pane.

2. Click **New Care Plan** on the toolbar.

3. Select the appropriate **Service Program** as the basis for the plan.

   NOTE
   The primary enrollment in the current SAMS Administrative setup is *NAPIS – All Funding Sources*.

4. Enter the **Start Date** and **End Date** for the duration of the plan, and set the **Status** as appropriate.

5. Click **OK** to create and enter the Care Plan.

Care Plan Overview

You will now be on the **Care Plan Summary** screen. Similar to the *Consumer Summary*, the **Care Plan Summary** highlights important information about the consumer's care plan.

Each heading is a hyperlink. Clicking a heading takes you to the appropriate area of the care plan.

Use the **Care Plan Details** hyperlink to make changes to the care plan *Status*, *Start* and *End Dates*.

Service Plans

A *Service Plan* creates service allocations designed to meet consumer service needs. All service plan calculations use **calendar months**. If a care plan extends into a month, even just for one day, SAMS considers it a whole month. For example, if a care plan runs from a *Start Date* of February 1 to an *End Date* of July 1, SAMS uses **seven** months for calculations, not six.

Service Plan Allocations

Each service within a service plan has an *Allocation Type*. Allocation types specify the duration for the planned service. SAMS has five types of service plan allocations: *Weekly*, *Monthly*, *Yearly*, *Care Plan*, and *Duration Specified*.

- **Weekly** - enter the service units by week. Users can plan services for specific days of the week and weekly *Frequencies* (bi-weekly, tri-weekly).

- **Monthly** - plan units for a month. Care plan costs are calculated by multiplying the services by the number of months in the care plan.

- **Yearly** - enter service allocations for an entire year.

- **Care Plan** - units of service entered are the total units for the length of the care plan.

- **Duration Specified** - allocations for one-time instances of planned services or those services that do not fit into *Care Plan* or other durations.

To create a new service plan:

1. Click **Service Plan** button in the *Care Plan Navigation* pane.

2. Click **Add Service** on the toolbar.
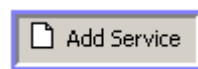
The **Service Plan Details screen** now appears.

> **The left side pane** tells SAMS *which Provider will be delivering the service and how much the service will cost.*
>
> The left side pane must be filled out before you start entering data into the right side pane.
>
> **The right side pane** tells SAMS *when the Service should be delivered*.

The order in which you fill out the Left Pane is important.

3. Select the appropriate attributes for the organizational information in the **Agency** and **Provider** fields.

4. Then select the appropriate attributes for the service information in the **Service** and optional **Fund Identifier** dropdowns.

NOTE
SAMS filters selection lists as you enter services. Selecting a *Service* first filters the *Providers* list. If you had selected a *Provider* first, SAMS would limit the services you could select to only those offered by the provider.

5. In the right-hand pane, click **Add** to create a *Service Plan Schedule*.

6. Select the appropriate **Allocation Type**.

TIP
In most cases for in-home services, the Allocation Type of *Weekly* will be the selection made. All examples that follow will use the Weekly allocation.

7. Enter the appropriate **Frequency** which tells SAMS how often to repeat the service: weekly (1), bi-weekly (2), tri-weekly (3), etc.

8. Set a **Start Date** or **End Date** if appropriate to reflect a specific period of time the schedule is relevant within the *Service Plan*.

9. In the *Week Detail*, enter the number of service units to allocation for each day of the week.

10. Click **Apply and Close** in the *Service Plan Schedule* pane.

11. Click **Apply and Close** in the upper left corner of the *Service Plan*

TIP

Apply saves your work and keeps the window open. **Apply and Close** saves your work and closes the current window.

Service Plan records contain other attributes that can be utilized when the specific cases call for them, such as **Subservices**, **Subproviders**, **Sites**, or **Special Instructions**.

Service Calendar

To view and print the service calendar:

1. Click **Show Calendar** on the toolbar. SAMS displays a calendar for the duration of the care plan.

2. To print the calendar as displayed on the screen, click **Print Calendar**.

3. To view a specific subsection of the service plan duration, choose a month from the dropdown to the right of the **Print Calendar** icon.

4. Click **Hide Calendar** to go back to the service allocation.

5. Click **Save**.

TIP

An aggregate calendar containing all service plans can be viewed by clicking **Calendar** from the *Care Plan Navigation* pane.

Service Orders

Service orders are typically generated from within a care plan. SAMS offers a separate *Service Order* area for each consumer, used to view and manage consumer service orders.

Generating Service Order Authorizations

Service Orders are authorized services for consumers that have been planned. SAMS tracks service orders against service contracts, service deliveries, and service allocations.

SAMS users can automatically generate service orders from service plan allocations or create individual service orders. Let's automatically generate service orders from within a service plan and then from consumer *Service Orders*.
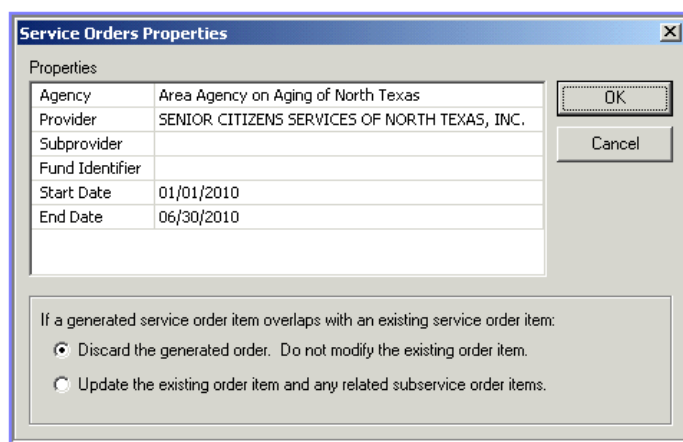
To automatically generate service orders:

1. From within a *Consumer Care Plan*, click **Service Plan** in the *Care Plan Navigation* pane.

2. Select the service allocation you want to authorize.

3. Click **Service Orders** on the toolbar.
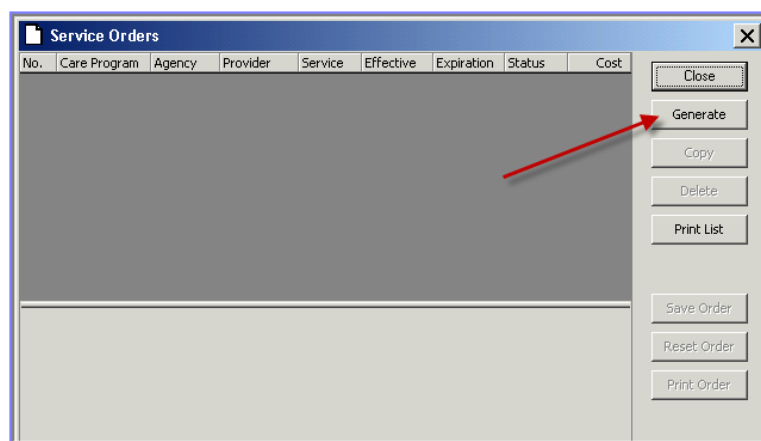
4. Click **Generate**.

5. In the *Service Orders Properties* screen, enter the **Start Date** and **End Date** to reflect the duration of Orders to create. Set the option on Discarding or Updating current order items accordingly.
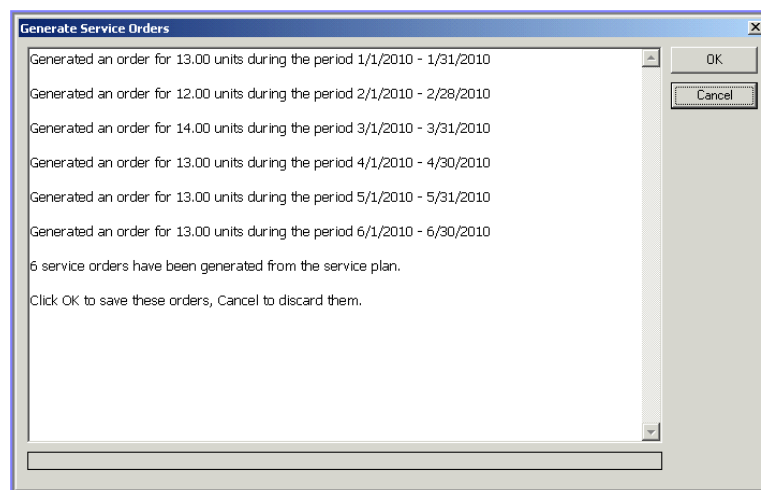
6. Click **OK**.

7. SAMS generates the orders and creates a log, displayed on the screen. After reviewing, click **OK** to save the service orders. **Cancel** prevents any changes to service orders.

8. SAMS updates the screen while changing and creating orders. Click **Done**.
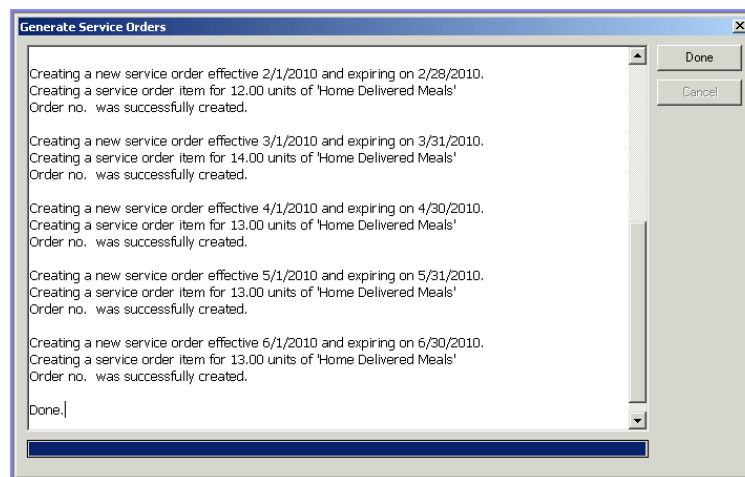
9. SAMS lists the newly generated or changed service orders on the screen.
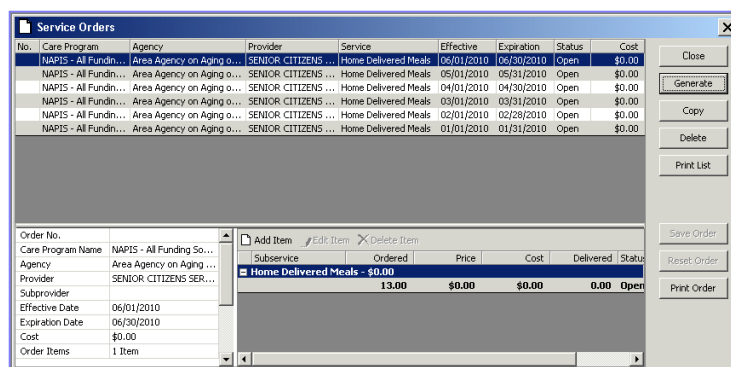
10. Click **Close**.

To add a service order manually:

1. From the Consumer Record, click **Service Orders** in the *Navigation* pane.

2. Click **Add Order** on the toolbar.

3. Select the appropriate **Care Program**, **Agency**, and **Provider**.

4. Enter an **Effective Date** and **Expiration Date** to reflect the duration of the authorizations being created.

5. Click **Add Item** to add an item to the service order.

6. Select the appropriate attributes for the service information in the **Service** and optional **Fund Identifier** dropdowns.

7. Click **Apply & Close Item** to add this item to the service order.

8. Click **Apply and Close** to create the service order record.

NOTE

Other attributes such as **Subservice**, **Subprovider**, or **Site** may be chosen in specific scenarios.
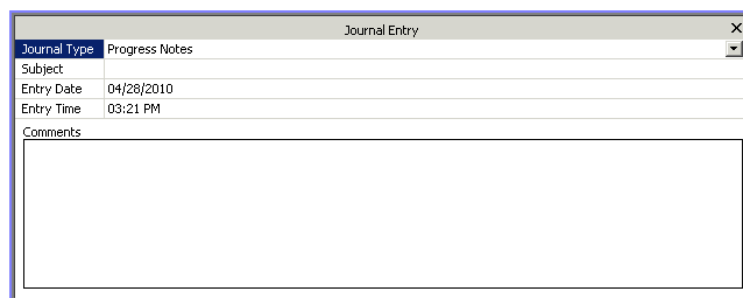
Consumer Journals

Journal entries in SAMS allow a user to track case notes for a consumer for a specified date/time. Each record allows for a subject and a journal type for a categorization for each entry being made.

Adding Journal Entries

Adding a new consumer journal entry:

1. Click **Consumer Journal** in the *navigation* pane.

2. Click the **Add Journal Entry** button.

3. Select the appropriate **Journal Type**, a **Subject**, and update the Date and Time if necessary.

4. In the *Comments* field, enter the details of the note.

5. Click **Apply and Close** to create the Journal entry.

Printing Journal Entries

SAMS allows multiple print methods to create a printout for an individual entry of for a compilation of multiple entries using the *Journal Log* option.

Print Previewing Journal Entries:

1. Press the **Print Preview Journal Entry** button.
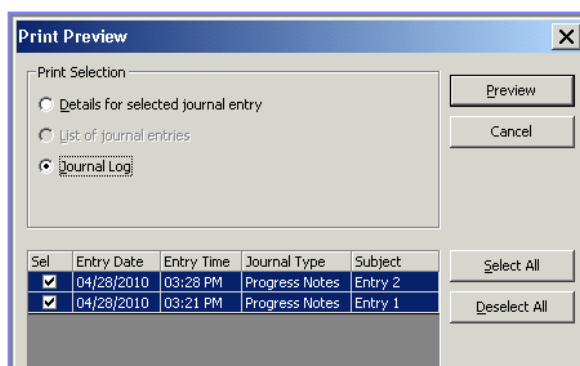
2. Select the appropriate option to preview the *Details for the selected journal entry*, or select *Journal Log* to allow for multiple individual entries to be included on a single printout.

3. Click **Preview** to generate the journal report printout.

> **TIP**
>
> The Journal History button will bring up an aggregated view of all journal records for the Consumer.

Exercise

Follow along with your instructor to practice entry of a consumer care plan, service plan and order, and journal entry.

1. Create a Care Plan for the current calendar year based on the *NAPIS All Funding Sources* program.

2. Create a Service Plan with the following attributes:
   a. Agency
   b. Provider
   c. Service = *Home Delivered Meals*
   d. Fund Identifier
   e. Unit Price

3. Create a Schedule for the Plan with the following attributes:
   a. Allocation Type = *Weekly*
   b. Frequency = 1
   c. 1 Meal on Mon, Tue, Wed, and Fri

4. After the Service Plan is created and saved, authorize the plan for the month of April using the Service Order Generation.

5. Save and Close the Care Plan.

6. Enter a case note in the Consumer Journals.

Task Management Overview

Activities

Organizations implement various methods for communicating tasks and needs for individual workers within a department, an organization, and beyond. The **Activities** feature in SAMS enables electronic tracking of tasks and accomplishments, and can be used for communicating needs. The SAMS User Guide outlines various methods for filtering and reporting on activities due, in progress, and completed using the Consumer Record, the Activity and Referral list, Reports, and the Dashboard.

As shown in the screenshot below for a previously created activity, there are many fields that can be set and used in filtering criteria for reports, activity lists or saved searches. For simplicity of standard practice, a worker will tend to focus on the type of activity in the **Action** dropdown field, the organization or care manager in the **Agency** or **Provider** fields, the **Status**, and the appropriate **Date** fields.

To create a new activity/referral:

1. Click **Activities & Referrals** in the *Navigation* pane.

2. Click **Add Activity/Referral** on the toolbar.

3. Enter a **Subject** for the task being created, and select the appropriate categorization for the activity in the **Action** dropdown.

4. Assign the activity to the appropriate individual or organization by selecting the **Agency** and/or **Provider** dropdowns.

5. Set the **Due Date** of the activity be clicking the appropriate day in the calendar in the lower right.

6. Enter any notes about the task in the *Comments* section.

7. Click **Apply and Close** to create the activity record.

NOTE
Other attributes for the activity can by entered as necessary.

Using the Activities & Referrals list

You can sort the *Activities & Referrals* list by any of the columns displayed on the screen. Click a column title once and the list sorts in ascending alphabetical or numerical order. Click once more to sort the records in descending order.

The list can be filtered in various ways using the *Date*, *Provider/Care Manager*, and *Status Quick Filters* in the upper left of the toolbar.
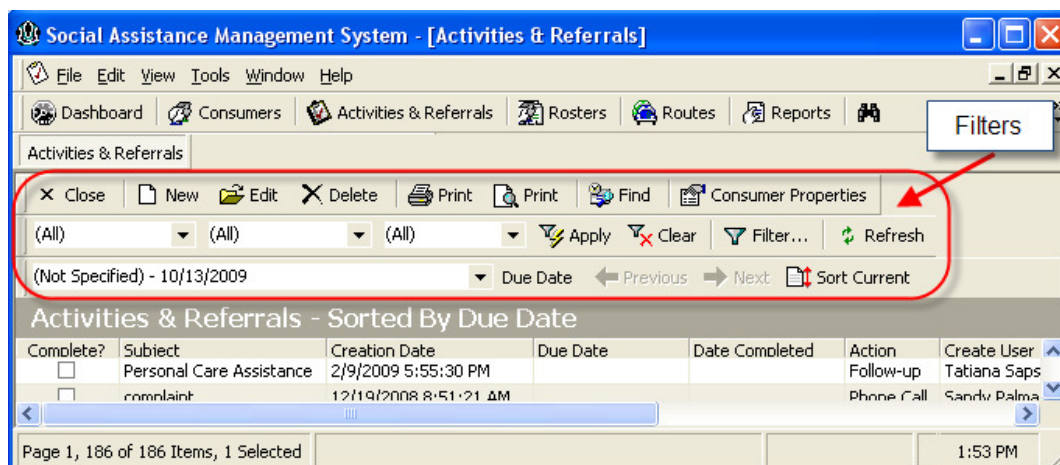
Dashboards

Included in SAMS is the Dashboard feature which gives each SAMS user a customizable access screen containing lists of tasks, consumers, and saved search information.
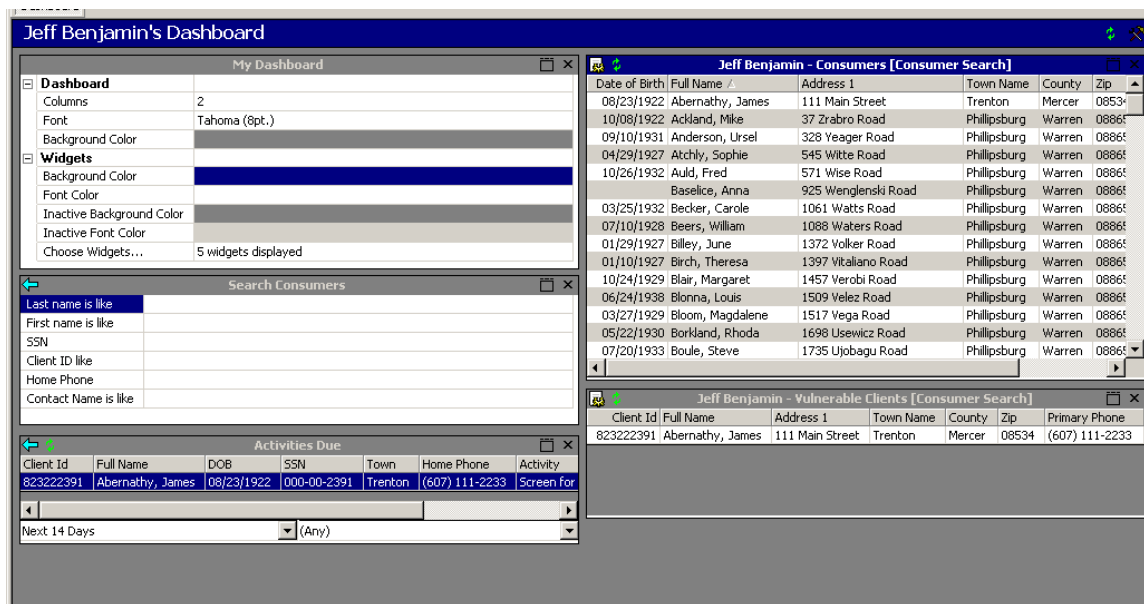
Setting up a Dashboard

Display Dashboard on Startup

When accessing the dashboard feature for the first time, SAMS will ask if you wish for the dashboard to display every time the application is opened. Most users select "yes." If you select "no", you can later go into SAMS and access **Tools>Options>Default Settings>Load Dashboard on Startup** and change the setting to "yes."

Selecting Widgets

You can select up to 11 widgets to display in your dashboard. **Widgets** are data panels that can be customized so the view meets the needs of the user. The example above contains a Search Consumers widget, one to show Activities Due, a customized saved search of the care manager's Consumers, and one for the care manager's list of Vulnerable clients.

Available Widgets

The 11 widgets available are as follows:

My Dashboard – This panel can be considered the "master widget." It is used to set the number of columns to display, the font and font size, and the background color of the dashboard. This panel also contains widget options including the background and font colors of active widgets (all will share the same display properties) and the background and font color of inactive widgets. Most importantly, the My Dashboard widget is where you will select the specific widgets (up to 11) that will be displayed in the dashboard.
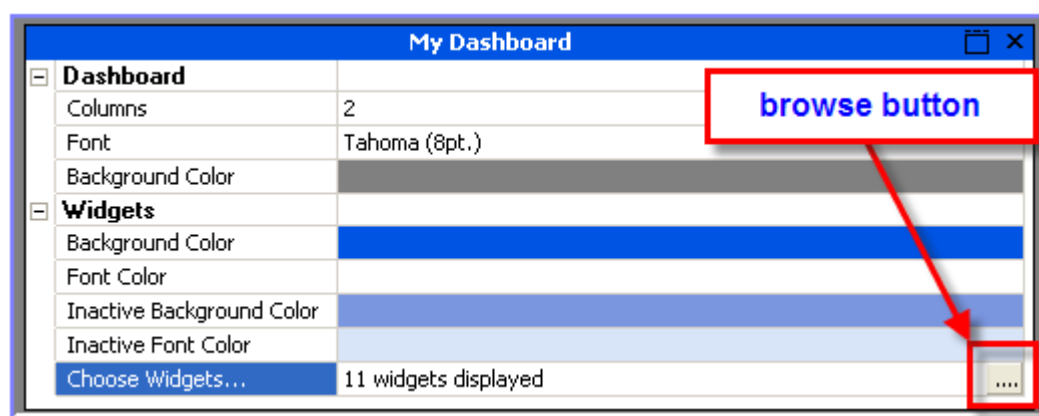
To choose the widgets for dashboard display, click the **browse** button. SAMS will bring up a window listing all the available widgets.

You can select none, all, or some of the widgets for your display by checking the box to the left of the widget's title.

The remaining widgets are explained below in the order of their appearance on the selection list.
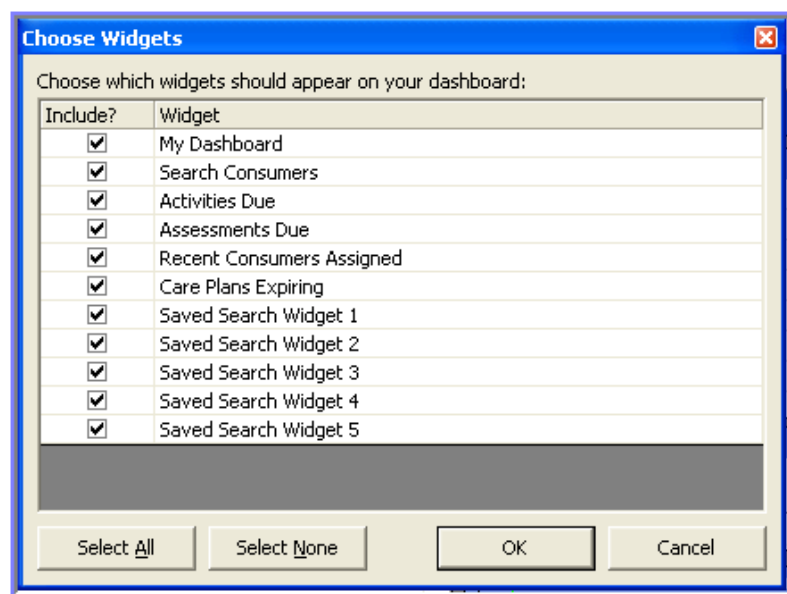
Search Consumers – This widget provides a quick way to do a search from the dashboard screen, bypassing the need to go into the Consumers area or to select the Search Consumers button.

Activities Due – This widget is used to show you at a glance when you have activities due (or past due). The panel can be configured to determine what types of activities to monitor (Any; Assessment Referral; Assign for Follow Up; Caregiver or Informal Support Contact; Develop Care Plan; Follow Up; Initial Assessment – Clinical; and/or Monthly Contact) and the time window for tracking the selected activities, which can range from activities due a year ago to activities due a year from today.

Assessments Due – This widget is used to generate a list of Consumers who have Assessments coming due for a defined time period of up to one year ago through one year from today.

Recent Consumers Assigned – This widget is used to generate a list of Consumers assigned to the worker within the defined time period. As with other widgets, the time can range from one year ago to one year from today.

Care Plans Expiring – This widget is used to alert the worker of any plans that have an expiration date within the defined time period, which can range from one year ago to one year from today.

Custom Search Widgets – the remaining widgets, **Saved Search Widget 1** though **Saved Search Widget 5**, are used to store custom searches that may be needed on a recurring basis. Having a Saved Search can save time by eliminating the need to enter the search criteria every time. Saved or Custom searches make it easy to locate specific Consumer Groups or Consumers having certain characteristics.

CAUTION

In order for a Saved Search Widget to be available for use, it must first be created as a *Custom Search*.

Custom Searches

Custom searches can be defined by Activity or by Consumer, and are defined by setting filters that determine which results to display.   Note in the window below, the top part is used to select the type of Custom Search. The bottom part of the window is used to define the search and set the applicable filters.

To create a saved (custom) search:

1. Click the **Custom Searches** button.

2. Select the template to create an *Activity Search* or *Consumer Search* and click the **New Search** button.

Search Title	
Comments	
Description	
Shared With	(All)
Modifications Allowed	(All)
⊟ **(Search Results)**	
Choose Columns for Consumer	(All)
⊞ **Care Enrollment**	
⊞ **Care Managers**	
⊞ **Consumer Details**	
⊞ **Providers**	
⊟ **Search Header**	
Subtitle	
⊞ **Advanced Filters**	

NOTE

The remaining steps assume a *Consumer Search* is being created.   The process to create an Activity Search is consistent by will have different filtering options available.

3. Enter a **Search Title**, **Comments,** and **Description** (optional), and set permissions for the search. **Shared With** refers to who can see the Custom Search – this can be set to All; User; Agency; Provider; or State Unit. **Modifications Allowed** refers to what can be changed in the Custom Search – this can be set to (All); (None); or Date Fields Only.

4. In **Choose Columns for Consumer** in the *Search Results* section, select the columns that are desired to be displayed in your search results.

5. Enter appropriate filters to define the resulting set in the sections for *Care Enrollment, Care Managers, Consumer Details, Providers,* and/or *Advanced Filters*.

6. Enter a **Subtitle** in the *Search Header* section if desired.

7. Click **Save and Close Search**.

> **TIP**
> To create a new search based on an existing custom search, use the **Save Search As** feature to create a new saved search with a new name.

The Saved Search will appear in the bottom window any time the user selects *Consumer Search* in the top part of the window. Now that the Saved Custom Search has been created, in can be used in the Dashboard's Custom Search Widgets.

Adding Saved Search to Dashboard

1. Click **Dashboard**.
2. On one of the **Saved Search Widgets**, select from the list of *Custom Searches* created.

> **TIP**
> If there are no options available in the drop down box, the system may not recognize the Saved Search that was just created. Click the Refresh button in the upper left corner of the panel.

3. SAMS will run the Saved Search.
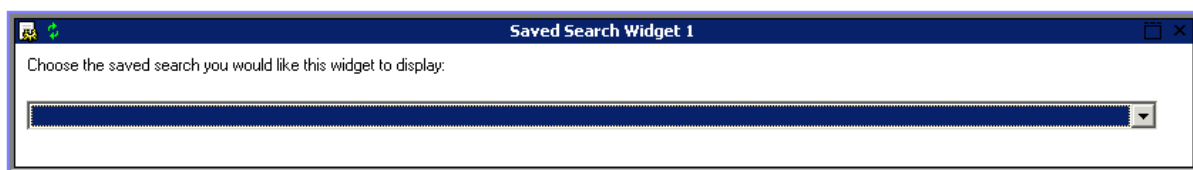
You can define up to **five** saved searches, and have SAMS run them for you automatically through the dashboard widgets. Each selected saved search widget will be retained and automatically updated upon subsequent logins.

Service Deliveries

*The Service **Delivery*** is a record of an actual unit of service provided to a **Consumer**. These records are the basis for all service reporting in SAMS as well as to the State and Federal Administrations through the NAPIS State Reporting Tool.

In the sections that follow, we will examine all aspects of a service delivery record and the methods for recording services for the consumers and groups in SAMS.

Breaking Down a Service Delivery

A Service Delivery is comprised of many attributes both mandatory and optional to reflect the aspects of the record's funding, organizations to provide the service, when the service occurred, and the specifics of the service unit and related costs. Below is a listing a the key fields that need to be tracked for all standard service deliveries in SAMS.

Care Program
Service Category
Service
Subservice
Fund Identifier
Topics
Service Month
Agency
Provider
Subprovider
Caregiver
Care Recipient
Site
Place of Service
Units
Unit Price
Daily Unit Details
Total Cost
Caregiver Service Delivery
Diagnosis Code
Service Order

Comments

Service Month – typically selected when the service record is first opened for addition, this reflects the period of service by calendar month.

Care Program – reflects the program under which the service to be provided is offered (e.g., ***NAPIS All Funding Sources)***. The consumer must be actively enrolled in a program for it to be available in a service delivery.

Agency – reflects the office that maintains the agreement with the service provider in supplying service to the consumer.

Provider – reflects the organization that is providing the service to the consumer.

Service – reflects the type of service provided to the client and is based on the State's taxonomy of possible services.

Units – reflects the amount of service provided to the client. The **Unit Type** for the service selected should be reflected by the number of units entered. Service units can also be reflected on the actual days provided by entering the unit amounts on the calendar in the **Daily Unit Details**.

Unit Price – reflects the cost per unit of service from the service provider selected. This amount will typically populate based on the provider's **Service Contract**. The entry of the number of units and the unit price will result in a calculated **Total Cost** for the service.

Other notable attributes are:

Service Category – reflects a pre-defined grouping for the service selected and will auto-populate when the service is chosen.

Subservices – reflects a breakdown of a service into smaller parts when necessary.

Fund Identifier – Reflects the source of the funds that will be used to provide the service to the client. This will typically not be set at the time of service entry but rather through **Unit Distribution**.

Subprovider – reflects a subcontractor organization that can be tracked if needed in the service record, but does not affect the standard federal reporting. Additional setup is required in the provider record for Subproviders to be available. The use of Subproviders is rare.

Site – reflects an individual place of service if a provider manages multiple locations. Typically used when a nutrition provider oversees multiple meal sites and there is a need to represent the breakdown for where a service was received by the consumer. Additional setup is required in the provider record for sites to be available.

Topics – reflects a breakdown for how a service is determined and can be used to generate the service units for accountability.

Other non-standard service attributes are:

Caregiver / Care Recipient – used in Caregiver service entry to reference the associated client record and is used in NAPIS reporting for Caregiver services.

Caregiver Service Delivery – used to record reciprocal services deliveries for Caregivers in Caregiver service entry.

Place of Service – reflects a physical locale for where a service is rendered and typically used when tracking for billing to Medicaid.

Diagnosis Code – reflects a medical diagnosis for the consumer to validate the need for the service entered using industry standard ICD-9 codes. Typically used when tracking for billing to Medicaid.

Recording Services in the Consumer Record

Service Deliveries can be recorded in SAMS in a variety of methods as we will see in the following sections; however it is important to note that regardless of the method of entry, **ALL** service records reside in the service delivery section of the consumer records.

Adding a new service delivery:

1. Find and open the desired consumer record.

2. Click on the **Service Delivery** button in the *Navigation* pane.

3. Click **Add Service** in the toolbar.

4. Select the **Service Period** for the month of the service and click **OK**.
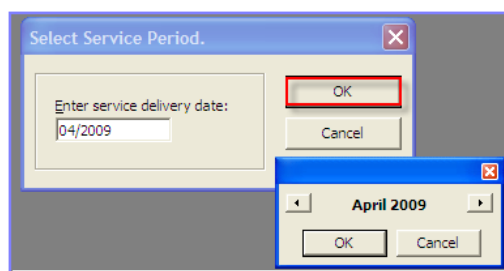
5. Select the appropriate attributes for the **Care Program**, **Agency**, **Provider**, (**Subprovider** or **Site** where appropriate), **Service**, and **Fund Identifier**.

 Note: The dropdowns for most service attributes will be filtered based on the service setup in SAMS to maintain the integrity of the data entered by only allowing valid selections to be made.

6. Enter the total number of service units for the month in the **Units** field or click on the browse button to the right of the **Daily Unit Details** field and enter the units on the individual days of service.

7. Click **Apply and Close** in the toolbar to commit the service record to the database.

Editing an existing service delivery:

1. Find and open the desired consumer record.

2. Click on the **Service Delivery** button in the *Navigation* pane.

3. Select the appropriate service and click **Edit Service** in the toolbar.

4. Change any desired attributes for the **Care Program**, **Agency**, **Provider**, (**Subprovider** or **Site** where appropriate), **Service**, and **Fund Identifier**.

5. If necessary, edit the total number of service units for the month in the **Units** field, or click on the browse button to the right of the **Daily Unit Details** field and enter the units on the individual days of service.

6. Click **Apply and Close** in the toolbar to commit the service record to the database.

> **Tip:** For entry of additional service units for a provider in a specific month, follow the steps to edit the existing service delivery record.

Aggregate Group Services

There are specific services in the taxonomy that will only require an estimated count of clients served for reporting. Such services are typically tracked by the provider maintaining a headcount of the consumers served rather than requiring a detailed collection of each consumer's demographic data. The entry of this type of data in SAMS is through the entry in a **Consumer Group**. These aggregate groups are created based on a set of like attributes.

Adding a new group service delivery:

1. From the **Consumer List**, click the **Type** dropdown in the toolbar and select *Consumer Groups*.
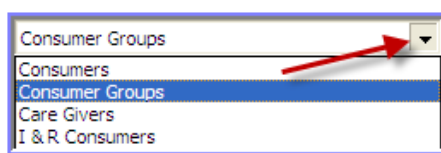
2. Find and open the desired aggregate group record.

3. Click on the **Service Delivery** button in the *Navigation* pane.

4. Click **Add Service** in the toolbar.

5. Select the **Service Period** for the month of the service.

6. Select the appropriate attributes for the **Care Program**, **Agency**, **Provider**, (**Subprovider** or **Site** where appropriate), **Service**, and **Fund Identifier**.

7. Enter the number of **Consumers Served**.

8. Enter the total number of service units for the month in the **Units** field, or click on the browse button to the right of the **Daily Unit Details** field and enter the units on the individual days of service.

9. Click **Apply and Close** in the toolbar to commit the service record to the database.

Service Delivery for the NFCSP – Title III E Services to Caregivers

Users record direct services to caregivers in a similar manner as with typical service deliveries. However, users should select the *Care Recipient* as reference to ensure that the delivery and relation attributes are reported correctly in the Title III E services on the NAPIS report that goes to the AoA.

CAUTION

It is highly recommended that you specify a *Care Recipient* on a Caregiver Service Delivery else the *Relationship* will not be reported to AoA through the NAPIS Report.

Recording Services to Caregivers:

1. Find and open the desired **Caregiver** record.
2. Click on the **Service Delivery** button in the *Navigation* pane.
3. Click **Add Service** in the toolbar.
4. Select the **Service Period** for the month of the service and click **OK**.
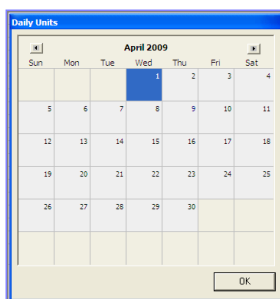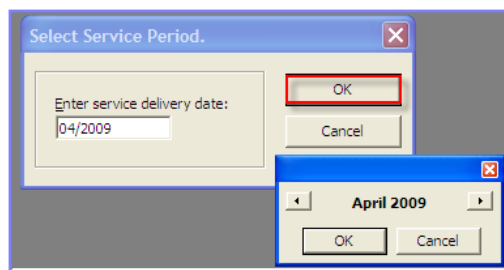
5. Select the appropriate attributes for the **Care Program**, **Agency**, **Provider**, (**Subprovider** or **Site** where appropriate), **Service**, and **Fund Identifier**.

> **Note**: In the current service taxonomy, caregiver services should use the **Fund Identifier** of *Title III-E* under the *NAPIS All Funding Sources* **Care Program**.

6. Select the **Care Recipient** as a reference for the service.

7. Enter the total number of service units for the month in the **Units** field or click on the browse button to the right of the **Daily Unit Details** field and enter the units on the individual days of service.

8. Click **Apply and Close** in the toolbar to commit the service record to the database.

> **CAUTION**
>
> Prior to caregiver services to function correctly in SAMS, there must be an association between the Caregiver and at least one Recipient. Also the Provider being used must be set up in the administrative structure as a *Consumer Provider* with appropriate caregiver services associated.

Exercise

Follow along with your instructor to practice entry of service deliveries.

1. Enter three service deliveries manually from the consumer record with the following attributes and methods:
   a. Service = *Home Delivered Meals* using Daily Unit Details
   b. Service = *Homemaker* using the Total for the month only
   c. Service = *Care Coordination Hour* using Topics (Case Managers)

Rosters

SAMS offers functionality in the way of **Rosters** to allow for bulk data entry for consumers that are receiving the same service, which are commonly used to enter nutrition services such as *Congregate Meals*.   Rosters are defined entry lists comprised of a **Roster Definition** and the functionality to **Record Service Data**. In the sections that follow, you will learn how to create a roster and how to record service deliveries using a roster.

Roster Definitions

Before a roster can be used to record service deliveries for a group of clients in SAMS, it must first be created by defining the specific attributes for the service to be delivered and to set filters defining the consumers to display on the roster list.

➢ *What* kinds of rosters can be created?

When defining a roster, a **Type** is selected to define the clients and services:

Multi-Service – used to record one or many different services offered by the provider for a group of consumers meeting the criteria of the roster.

Specified Service – used to record only one service specified for a group of consumers meeting the criteria of the roster. The service must be selected in the **Service Properties**.

Service Plan (Multi-Service) – used to record one or many services based on consumer care plans. No filtering need to be set as the roster will automatically bring in only consumers with active service plans containing the same service attributes.

Service Plan (Specified Service) – used to record only one service specified based on consumer care plans. No filtering need to be set as the roster will automatically bring in only consumers with active service plans containing the same service attributes. The service must be selected in the **Service Properties**.

➢ *How* are rosters defined to create service deliveries?

As seen in previous sections, a service delivery contains various attributes that define the record. In the creation of the Roster Definition, each of the desired attributes will be set and any deliveries made to consumers via the roster will assume all of these attributes.

➢ *Who* are the consumers that make up the roster list?

The other half of a roster definition is to establish criteria to determine what consumers that exist in the database will show on the roster list. There are many fields that can be used in the determination by setting filters.

Creating a new Roster:

1. Click the **Rosters** button.

2. Click **New Roster** on the toolbar.

3. Enter a **Name** to distinguish the roster on the main list.

4. Select the appropriate **Type** for the Roster.

5. Select the **Care Program**, **Agency**, and **Provider** (**Subprovider** and **Site** where appropriate) to use as attributes for all services to be recorded via this roster.

6. Click the browse button to the right of the **Service Properties** field if service selections need to be entered.

7. On the **Roster Service Properties** window, click the **Add New** button.

8. Select the appropriate **Service** and **Fund Identifier** and click **Apply** to add it to the list.

9. Repeat steps 7. and 8. to add all desired services to use in the roster.

TIP

Add all appropriate services to a Multi-Service roster to allow for entry of many services from a provider to be recorded, or a Service Plan (Multi-Service) roster can be left blank with no services specified to allow for all active planned services to utilize the same roster for a provider.

10. Click **Close** to return to the Roster Definition.

11. Select the appropriate filtering criteria to narrow the resulting data set.

NOTE

Filtering fields can be single-selection dropdowns, multiple-selection lists, or date fields.

12. Click the **Preview** button in the toolbar to see the resulting set of consumers meeting the filtering criteria set, if desired.

13. Click **Save and Close** to commit the roster definition to the database and return to the Roster List.

14. Click **Refresh** on the toolbar if necessary to display the new roster.

Recording Services in Rosters

Now that the shell of a roster has been created to define how the services are to be saved, it is possible to use the roster to record service data for the consumers. Below is an overview of a Record Service session in a Roster:

Recording services in a Roster:

1. Click the **Rosters** button.

2. Select the desired roster in the list and click **Record Service Data** on the toolbar.
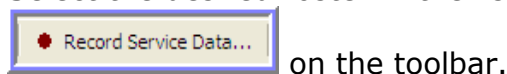
3. Select the **Service Period** for the month of the service and click **OK**.

4. For each consumer row in the list, enter the number of service units in either the **Total Units** column to reflect an aggregate total for the month, *or* in the appropriate column for each individual day that the service was provided to the client.
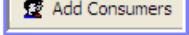
Client	Total Units	Wed 01	Thu 02	Fri 03	Sat 04
Congregate Meals	26.00	8.00	9.00	9.00	0.00
Saylor, Nellie (1300004290)	2.00		1.00	1.00	
Scales, Louise (1300004284)	3.00	1.00	1.00	1.00	
Scarantino, Maria (1300004273)	3.00	1.00	1.00	1.00	
Scardelli, Doris (1300004269)	3.00	1.00	1.00	1.00	
Scarpa, Kathryn (1300004261)	2.00	1.00		1.00	
Schmitdt, Antoinette (1300004165)	3.00	1.00	1.00	1.00	
Schneider, Margaret (1300004153)	2.00	1.00		1.00	
Schneider, Margaret (1300004157)	1.00		1.00		
Schottler, Maryanne (1300004125)	3.00	1.00	1.00	1.00	
Schuler, Osley (1300004106)	1.00		1.00		
Schultz, Katherine (1300004097)	3.00	1.00	1.00	1.00	

TIP

Uncommitted service units added to the roster during the session will appear in **blue**. Complete all data entry before clicking Save to record all units at once.
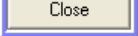
5. Click **Save** [🖫 Save] to commit the service deliveries to the database.

Adding Consumer to Roster (using session already open):

1. Click the **Add Consumers** [🧑 Add Consumers] button in the toolbar.

2. Enter the appropriate search criteria and click **Find**.

Consumers	
Consumer	Add to Roster
Last name is like	
First name is like	Close
Client ID like	
Medicaid No. like	Find
Medicare No. like	
General	Clear
Service	

3. Check the box next to the desired consumer(s) in the result set in the bottom window and click **Add to Roster**.

Consumers		Add to Roster
☑ Abernathy, James (823232392)		Close
		Find
		Clear

4. Repeat steps 3. and 4. to add additional consumers if desired.
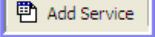
5. Click **Close** [Close] to return to the roster session.
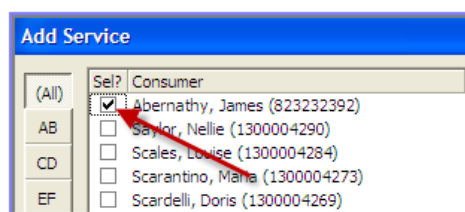
NOTE

Consumers added to the roster in this method will appear in the current roster session only. When opened, a roster session displays only consumers meeting the filtering criteria.
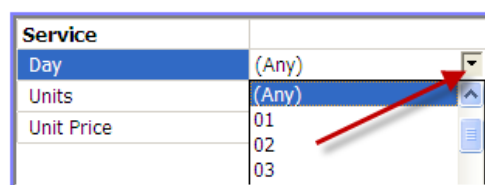
Alternate method to add services with the roster session already open:

1. Click the **Add Service** [Add Service] button in the toolbar.

2. Check the **Sel?** column next to the names of the consumers to enter services for.

3. In the **Service** section, select the **Day** to record the services for, or leave as **(Any)** to record the total for the month.
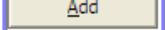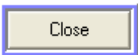
4. Enter the number of **Units**.

5. Click **Add** [Add] then click **Yes** to confirm the service addition.

6. Repeat steps 2. through 5. to add additional services if desired.

7. Click **Close** [Close] to return to the roster session.

SAMS Reports

Now that we have seen multiple methods for entering data into SAMS, let's take a look at how we can get the data out of SAMS. Refer to the end of the manual for a listing summarizing all default report templates in SAMS Reports. Each template contains various available selections for grouping and sorting outputs, data fields to display, and robust options for filtering results. Although each report template is unique in the output and purpose, the methodology for creating saved reports is consistent.

Accessing SAMS Reports

The Reports section of SAMS can be accessed by clicking on the **Reports** button in the **Main Toolbar.**

The Reports main screen contains four parts, each of which is shown in the illustration on the page following the description:

1. The Reports Tool Bar *which contains buttons that allow you to open a* **New Report,** *open or delete a* **Report Definition, Filter** *the list of Report Definitions,* **Find** *a specific Report Definition or* **Clear Filters.** *These features can also be accessed by right clicking in the main screen.*

2. On the left side of the screen is the **Navigation Pane,** which contains icons for each of the **Report Categories** in SAMS.

3. In the center of the window on the upper portion of the screen, SAMS displays the **Report Templates** that are available in the selected **Report Category.** Report templates form the baseline for new reports.

4. The lower portion of the center area of the screen contains saved **Report Definitions.** Report definitions represent existing reports that were previously created from a report template.

The columns within the upper and lower sections of the main screen (templates area and definitions area) can be sorted by clicking on the desired column heading, resized by dragging the separator bar, or moved by dragging and dropping.

Reports Interface
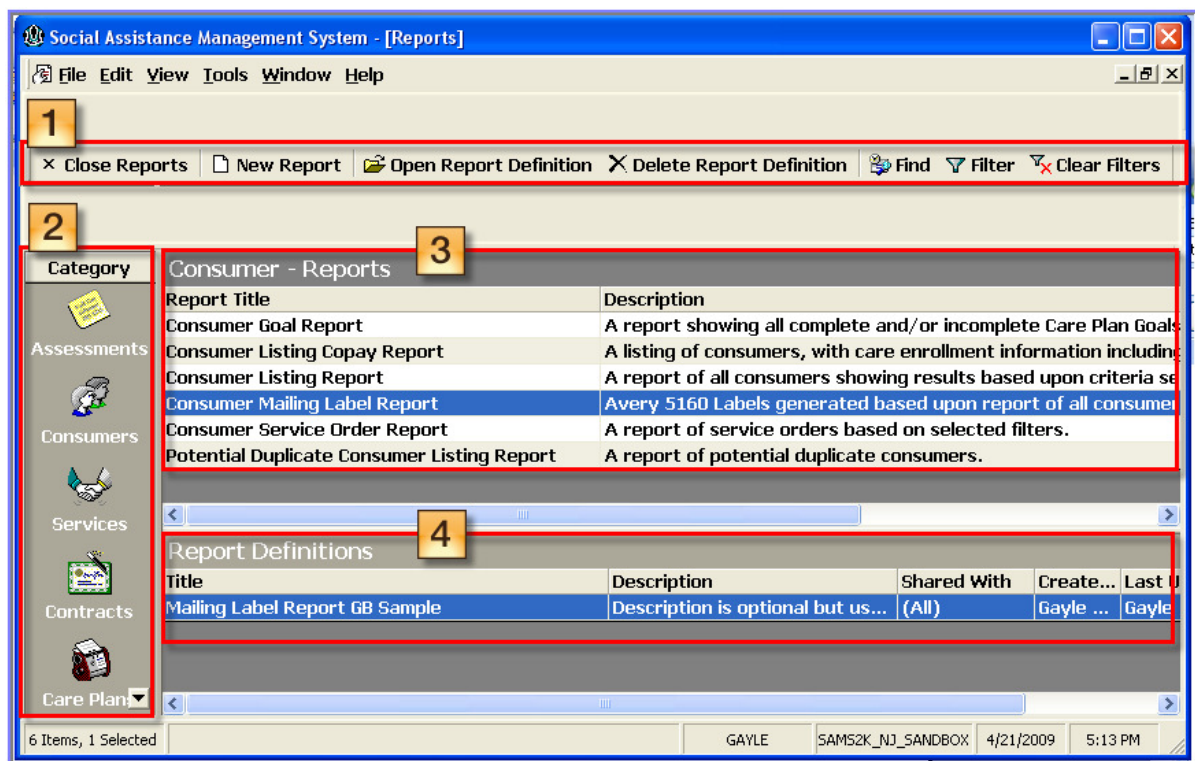
1. Reports Tool Bar

2. Reports Navigation Pane

3. Available **Report Templates** for the selected Report Category

4. Saved **Report Definitions** built from the category's Templates

In this example, we'll learn how to create an Agency Summary Report, which is one of the most widely used report templates.

Creating a new Agency Summary Report:

1. Click the **Reports** ⌐🗐 Reports ⌐ button.

2. Click on the **Services** ⌐🤝 Services ⌐ button in the **Navigation Pane**.

3. Select the **Agency Summary Report** template in the top section of the split window.

Service - Reports	
Report Title	Description
Agency Summary Report	Summary Report showing Service Delivery throughout an entire agency (or agencies) group
Agency Summary Report - New Consumers	Summary Report showing Service Delivery for New Consumers throughout an entire agency
Agency Summary Report (Totals Only)	Totals only report showing Service Delivery throughout an entire agency (or agencies) grou
Compact Route Sheet (Daily)	SAMS Report for printing daily compact route sheet.
Compact Route Sheet (Weekly)	SAMS Report for printing weekly compact route sheet.
Consumer Contact And Phone Listing Report	A report of consumer contact phone listing based upon criteria selected.
Consumer Quarterly Report	A report detailing consumer counts by service with demographic breakdown.
Consumer Services List Report	A listing of all clients receiving a specified service or services totaling by client along with a
Multi Service Report	A breakdown of service delivery by multiple-categories. Displays distinct consumer count o
NAPIS Consumer Listing	A report of all consumers showing results based upon criteria selected.
NSIP Meal Reports Tab	Cross Tab of all Home Delivered and Congregate Meals (NSIP Meals) delivered in a specifie
NSIP Meals Recipient List	Listing of all consumers who have received a Home Delivered or Congregate Meal (NSIP Me
SAMS Consumer Provider Service Report	Report showing list of Consumers who have received services. Report results include Last I
SAMS Kitchen Report	A list of meal counts, by Route.
Service Category Monthly Report	Monthly Agency performance report on Service Category
Service Delivery Consumer Listing	Report showing list of consumers who have received a specified service or services. Repor
Service Delivery Consumer Mailing Label	Avery 5160 Labels generated for consumers receiving a specified service or services.
Service Delivery Profile - Cross Tab	Cross Tab of all clients receiving a specified service or services broken down in a cross tab.
Service Demographics	A report of services delivered and related consumer demographics statistics, by fiscal perio
Topic Profile - Outcome Chart	A chart illustrating all topic outcomes.
Topic Profile - Topic Hours Distribution	A listing of all topics recorded sorted by consumer.
Topic Profile - Topic Time Spent Chart	A chart illustrating time spent on individual topics.

4. Click **New Report** ⌐🗋 New Report ⌐.

> 🎵 **Note**: The steps that follow use the template for the *Agency Summary Report*, the most commonly used service report. Other report templates may vary slightly with available options.

5. Enter a **Report Title** if the report is to be saved for future use. Optional **Comments** and **Description** can also be added for report clarification.

Report Title
Comments
Description

6. In the **Report** section of the definition, set the appropriate options and selections for grouping, sorting, and the options for what data to include.

Report	
Print Parameters	No
Sort By	Client ID
Group By	Agency
Group Per Page	No
Sub Group By	No Sub Grouping
Group and Subtotal By Service Month	No
Show Consumers	Yes
Show Client ID	Yes
Show Monthly Details	No
Show Subservice Details and Totals	Yes
Show Consumer Subtotals	No
Show Daily Details	No
Include Consumer Groups	Yes

7. In the **Report Header** section of the definition, enter optional **Subtitle** and **Report Comments** to display at the top of the report result.

Report Header
Subtitle
Report Comments

8. In the **Report Security** section, select the appropriate option for who will be allowed access to the saved report in the **Shared With** field. Available drop down list options are as follows:

  ➢ *(All)* – Allows all users of SAMS to have access to the saved report.

  ➢ *(User)* – Allows only the create user to have access to the saved report.

  ➢ *Agency* – Allows any users of SAMS associated to the same Agency as the create user to have access to the saved report.

  ➢ *Provider* – Allows any users of SAMS associated to the same Provider as the create user to have access to the saved report.

  ➢ *State Unit* – Allows any users of SAMS associated to the same State Unit as the create user to have access to the saved report.

9.   Select the appropriate option for what changes can be made to the saved report in the **Modifications Allowed** field. Available options are as follows:

   ➢   *(All)* – Any user with access to the saved report can change any options or settings.

   ➢   *(None)* – Only the create user has ability to change the saved report options and settings.

   ➢   *Date Fields Only* – Any user with access to the saved report can only change date fields, such as service start date and end date.

10. Set any appropriate filtering for the **Consumer Details**, **Status**, **Location**, **Advanced Filters** to limit the resulting consumer set based on data existing in the consumer record.

11. Set any appropriate filtering in the **Service Delivery** section of the report definition to limit the resulting service data existing for each consumer.

Filtering:

Consumer Details	
Consumer Type	(Any)
Active	(Any)
Reason	(Any)
Status Date (on or after)	
Status Date (on or before)	
Consumer Status	
NSIP Eligible Status	(Any)
Eligibility Type	(Any)
Residential Location	
Towns	(Any)
Counties	(Any)
Municipalities	(Any)
States	(Any)
Zip Code	(Any)
Service Delivery	
Advanced Filters	
NAPIS	
Ethnicity	(Any)
In Poverty	(Any)
Lives Alone	(Any)
High Nutrition Risk	(Any)
Is Rural	(Any)
Number of ADLs	(Any)
Number of IADLs	(Any)
Personal	
Registered Date (on or after)	
Registered Date (on or before)	
Age (is equal to or greater than)	
Age (is equal to or less than)	
Birth Date (on or after)	
Birth Date (on or before)	
Referred By	(Any)
User Field	
User Fields	(Any)

Consumer Details	
Consumer Status	
Residential Location	
Service Delivery	
Service Start Date (on or after)	
Service End Date (on or before)	
Agency	(Any)
Provider	(Any)
Provider Role	(Any)
Subprovider	(Any)
Level of Care	(Any)
Service Program	(Any)
Care Program	(Any)
Care Program/Services	(Any)
Service Category	(Any)
Service	(Any)
Fund Identifier	(Any)
Place of Service	(Any)
Subservice	(Any)
Site	(Any)
Caregiver	(Any)
Advanced Filters	

TIP
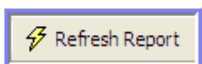
When setting filtering criteria, start with a limited number of filters and preview the results, then add more filters as needed. An overly filtered report may result in no rows returned and can slow down the system's performance while the query runs.

12. Click the **Print Preview** [🔍 Print Preview] button in the toolbar to run the report.
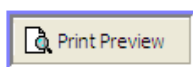
13. Make any appropriate changes to the report filtering or options.
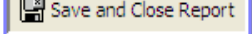
14. Click the **Refresh Report** [Refresh Report] button in the toolbar to rerun the report against the updated criteria.

15. Click the **Print** [Print Report] button in the toolbar to send the result to a printer, or click **Export Report** [Export Report...] to send the report to an electronic file such as PDF.

CAUTION
Although multiple export file options are available, the rendered image of most reports in SAMS best translates to an Adobe PDF file.

16. Click **Save and Close Report** [Save and Close Report] to commit the saved report to the database and return you to the report list screen.

NOTE

When a report is given a title and saved, it will appear in the bottom section of the spilt window on the report list screen and can be used as a saved report.
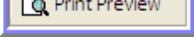
Editing a saved Report Definition:

1. Click the **Reports** [Reports] button. Let's assume that we want to edit a saved Agency Summary Report Definition.

2. Click on the **Services** [Services] button in the *Navigation* pane.

3. Select the Agency Summary report template in the top section of the split window.

4. Select the desired saved report definition in the bottom section of the split window and click **Open Report Definition** 📂 Open Report Definition .

5. Make any desired changes to the report filtering or options.

6. Click the **Print Preview** 🔍 Print Preview button in the toolbar to run the report against the updated criteria.

🚫 **CAUTION**

The ability to change any filtering data or options for users other than the create user is dependent upon the **Modifications Allowed** settings.

7. Click the **Print** 🖨 Print Report button in the toolbar to send the result to a printer, or click **Export Report** ✉ Export Report... to send the report to an electronic file such as PDF.

8. Click **Save and Close Report** 💾 Save and Close Report to commit the saved report to the database and return you to the report list screen.

Exercise

Follow along with your instructor to practice entry of rosters and reports.

1. Create a Roster Definition with the following attributes:
    a. Type = Specified Service
    b. Agency
    c. Provider
    d. Service Properties = *Congregate Meals*
    e. Fund Identifier = *Title III-C1*
    f. Unit Price

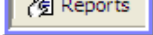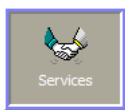2. Filter the Roster to only include clients that live in the town that you used in the Residential Address for your consumer (Preview the roster to make sure your client appears in the list).

3. Record services for this roster for the month of April entering 15 units for your consumer in the Total column.

4. Save and Close the Roster to commit the services to the database.

5. Create an Agency Summary Report definition with the following report settings:

Report	
Print Parameters	No
Sort By	Last Name
Group By	Provider
Group Per Page	No
Sub Group By	No Sub Grouping
Group and Subtotal By Service Month	No
Show Consumers	No
Show Client ID	No
Show Monthly Details	No
Show Subservice Details and Totals	No
Show Consumer Subtotals	No
Show Daily Details	No
Include Consumer Groups	Yes

6. Set the Service filters to include the following report limitations:
    a. Service Date and End Date for the first quarter (*01/01/2010 – 04/30/2010*)
    b. Only include Services of *Congregate Meals*, *Home Delivered Meals*, and *Homemaker*.

7. Run the Report.

Appendix A: Report Descriptions by Category

Assessment Reports

Blank Consumer Assessment – Select an existing assessment form to print a blank copy.

- ***When to use:*** *You want to print out or export a copy of a blank assessment form to fill in by hand. This report will not display any consumer information at the top of the assessment form.*

Consumer Assessment Report – A listing of all consumers that are due for a reassessment.   It can be filtered either by date of last assessment or by assessment due date. Several grouping options are available including assessor, assessment form, date of assessment and next assessment date. Additional filtering options now available to allow for filtering based on service deliveries received.

- ***When to use:*** *You want to run a list to see any consumers that are due for a reassessment. Enter in either the date the initial assessment was done or when the reassessment period is due to filter the listing of consumers and the related assessment detail.*

Consumer Reports

Consumer Goal Report – Returns a listing of all consumers with completed or incomplete Care Plan Goals. Additional display options are available in the report definition to include the details of the Care Plan Goals.

- ***When to use:*** *You have been tracking Goal statements in the Care Plans of your consumers and want to report on the consumers that have certain statuses or levels of achievement towards these Goals.*

Consumer Listing Co-pay Report – A listing of consumers displays care enrollment details, and co-payment records and relations.

- ***When to use:*** *You want to see a list of all consumers' Cost Share values in a certain date range from a Care Program, as well as any household Co-Pay relations.*

Consumer Listing Report – A listing of consumers displays demographic information with extensive filtering capability. Additional display options are available for grouping, sorting, Location filtering, and including various consumer-related details.

- **When to use:** *Likely the most common report for basic consumer listings. Run anytime you want to return a list of consumers that meet a certain criteria, such as anyone living in a certain town, or if a Case Manager wants a list of all of their clients sorted by Last Name.*

Consumer Mailing Label Report – A listing of 3 X 10 Avery 5160 labels for consumers with address details. Extensive filtering options are available.

- **When to use:** *You want to generate mailing labels for consumers that meet a certain criteria, such as a birthday card list.*

Consumer Service Order Report – A listing of consumers with basic demographic information, and additional options to display service order details. Extensive filtering options are available.

- **When to use:** *You have been implementing Service Orders (Authorizations) and need to generate a list of all consumers and their Orders based on a certain criteria, such as a date range to print out the authorizations for the week.*

Potential Duplicate Consumer Listing Report – A basic listing of consumers displays demographic information, and based on possible duplicated consumers in the database. All filtering options are built into the report parameters.

- **When to use:** *As consumers are entered or imported into the database, SAMS performs multiple levels of integrity checks in an attempt to prevent duplication that can be overridden by the user either manually or by options set. This report allows for the integrity checking rules for duplication in SAMS to check potential matches for consumers. Run this report anytime you wish to clean up duplication of clients in the database.*

Service Reports

Agency Summary Report – A summary listing displays service delivery information across agencies, allowing for robust filtering, grouping and sorting options. Additional options available to include multiple levels of information for the consumers served.

- *When to use: Likely the most common service-level report utilized for monthly reporting of clients served. Run anytime you wish to see an unduplicated list of clients served and the total counts based on a certain criteria, such as consumers that have received a Home Delivered Meal this month grouped by provider.*

Agency Summary Report – New Consumers – A variation of the Agency Summary Report (see above) allowing reporting options to filter by new consumers to receive services in the reporting month based on the fiscal period start.

- *When to use: You want to get a list of consumers that have received services new in the current reporting month and not previously in the fiscal period.*

Agency Summary Report (Totals Only) – A variation of the Agency Summary Report (see above) only allowing for total counts to be displayed for service delivery data.

- *When to use: Commonly used as a monthly or annual report by state units or agencies to report totals for clients served, service units and costs. This is an optimized report when individual consumer detail is not necessary in the results.*

Compact Route Sheet (Daily) – Allows for printing one or more daily compact route sheets with additional filtering options for the services or subservices in the routes.

- *When to use: You want to generate daily compact route sheets for a group of routes at once. If the report is created and saved, then the route printing is simple and consistent without having to set the options every day.*

Compact Route Sheet (Weekly) – Allows for printing one or more weekly compact route sheets with additional filtering options for the services or subservices in the routes.

- ***When to use:*** *You want to generate weekly compact route sheets for a group of routes at once. If the report is created and saved, then the route printing is simple and consistent without having to set the options at the start of each week.*

Consumer Contact And Phone Listing Report – A basic listing of a consumer and their contacts. Extensive filtering options are available as well as an option to include clients that have not yet received services.

- ***When to use:*** *You want to generate a phone directory for your clients and their contacts in case of emergency. Filtering options are available so a Case Manager can create a list of contacts for only their clients.*

Consumer Quarterly Report – A basic cross-tab table displays consumer counts per quarter for each provider broken down by consumer demographics and characteristics. Some additional filtering is available to limit the results by service detail. The resulting rows for demographics and characteristics will only display if there are consumers served corresponding to the field.

- ***When to use:*** *You want to see the counts of clients served by quarter over a fiscal year, and see a detailed demographic breakdown of what types of clients received services.*

Consumer Services List Report – A listing of all consumers displays the services received for each. Extensive filtering options are available as well as multiple options to group and sort the results.

- ***When to use:*** *You want to see a list of services that each client has received based on a certain criteria, such as a date range for the service deliveries.*

Multi Service Report – A table groups and displays counts for each type of service received and categorizes by multiple consumer characteristics and demographics. A selection option allows the report to display either distinct consumer counts or total service units. Extensive filtering options are available to limit the resulting data.

- ***When to use:*** *You want to see a detailed demographic breakdown of what types of clients received services.*

NAPIS Consumer Listing – A listing of all consumers that have received services displays columns for existing and missing NAPIS information. Extensive filtering options are available to limit the resulting data.

- *When to use: You want to check the demographic detail that has been captured for your clients while preparing the federal NAPIS report. This powerful report will show where the holes in the data collection are for the clients that receive services.*

NSIP Meal Reports Tab – A cross-tab report of all home delivered and congregate meals (NSIP meals) delivered grouped by agency and listed by provider, sub-provider or site. Filters are available to limit the results by service and/or NAPIS demographics. A reimbursement rate can be entered to display the reimbursement cost for the NSIP meals.

- *When to use: You want to create a report to show how many meals were provided to clients based on a certain criteria, such as a time period. Entering a reimbursement rate will display the NSIP cost for the services provided.*

NSIP Meals Recipient List – A listing displays all consumers that have received home delivered or congregate meals (NSIP meals). Filters are available to limit the results by service and/or NAPIS demographics, and grouping and sorting options are available to customize result display.

- *When to use: You want to see a listing of all clients that have received NSIP meals based on a certain criteria, such as a time period. The list will be grouped by agency, and you can select the grouping for the consumer results, such as by provider.*

SAMS Consumer Provider Service Report – A listing of consumers receiving services displays to show the service, provider and consumer detail. Extensive filtering options are available to limit the resulting data, and grouping and sorting options are available to customize result display.

- *When to use: You want to see a simple list of all clients that had received services, the service, and the provider based on a certain criteria, such as a time period.*

SAMS Kitchen Report – A listing of all meals displays consumer, service detail, and meal counts that have been planned by route. An additional option is available to display a cross-tab summary of the total count of meals by route, and limited filtering is available to limit the results based on route definitions and service plan status.

- *When to use: Typically used by meal sites that need to prepare the meals or to order meals prior to delivery. This list will result in the total counts of the types of meals based on the routes previously set.*

Service Category Monthly Report – A monthly agency cross-tab report showing service counts by service category. Limited filtering options are available to limit the result based on service fields.

- *When to use: As a state or agency administrator, you want to see a list of service counts grouped by service category. The report will have monthly pages of results based on the fiscal year period entered and the report month.*

Service Delivery Consumer Listing – A detailed listing of consumers displays demographics as well as service and provider information for the service deliveries entered. Extensive filtering options are available to limit the resulting data, and grouping and sorting options are available to customize result display.

- *When to use: You want to return a list of client-level detail, such as address information, for clients that have received services based on a certain criteria, such as a given date range or from a certain provider or service. Display options give the flexibility to show or hide additional levels of details for consumers, services, and providers.*

Service Delivery Consumer Mailing Label – A variation of the Consumer Mailing Label Report (see above), with additional filtering available to limits results based on service delivery data entered.

- *When to use: You want to return a list of mailing labels but want to filter by service deliveries entered, such as consumers that have received services in a certain date range or from a certain provider or service.*

Service Delivery Profile – **Cross Tab** – A cross-tab report displaying distinct consumer counts and units of service. Report options allow for the selection of the row and column to use in the resulting report and extensive filtering options are available to limit the resulting data.

- *When to use: You want to see a list of consumer counts and service units, but want the flexibility to compare the results by different options for a row and column cross-tab. An example would be if you wanted to show the gender of the clients served by provider, thus selecting Gender as the column and Provider as the row. Additional filters can be added to limit results such as a service date range or to select certain providers or services.*

Service Demographics – A statistical report that displays counts of characteristics, services, and meal data for consumers served in a specified fiscal period. Extensive filtering options are available to limit the resulting data.

- *When to use: As a state or agency administrator, you want to see a breakdown of consumers served by characteristics. The report will have result pages based on the grouping option selected.*

Topic Profile - Outcome Chart – A statistical report that creates a pie chart showing the percentages of outcomes for topics entered in service deliveries as well as a listing of the outcomes and associated times. Extensive filtering options are available to limit the resulting data.

- *When to use: If you utilize Topics in the service delivery entry and you want to see a breakdown of the outcomes used for each topic. Additional filters can be added to limit results such as a service date range or to select certain providers or services.*

Topic Profile - Topic Hours Distribution – A listing of consumers includes topic details for services received. Extensive filtering options are available to limit the resulting data, and grouping and sorting options are available to customize result display.

- *When to use: If you utilize Topics in the service delivery entry and you want to see a list of topics for each client served as well as average, minimum, and maximum times spent on each topic. Additional filters can be added to limit results such as a service date range or to select certain providers or services.*

Topic Profile - Topic Time Spent Chart – A statistical report that creates a pie chart and/or bar graph showing the time spent for topics entered in service deliveries as well as a listing of the associated times. Extensive filtering options are available to limit the resulting data.

- *When to use: If you utilize Topics in the service delivery entry and you want to see a breakdown of the time spent on each topic. Additional filters can be added to limit results such as a service date range or to select certain providers or services.*

Contracts Reports

Service Contracts Report – An effective tool that can be used to monitor service contracts that creates a listing of agencies and providers and snapshot detail of the services affecting the contract items. Limited filtering is available to narrow the results by organization or contract dates.

- *When to use: As a contract administrator, this report will allow you to see a running total of the services that affect a contract between an agency and a service provider. The report specifically shows the totals for service deliveries that have been entered as well as the units and/or dollars remaining in the contract budget.*

Care Plans Reports

Care Plan Consumer Cost – A listing of consumers detailing the planned services as compared to the services actually received in the reporting period and fiscal year selected. Extensive filtering options are available to limit the resulting data, and grouping and sorting options are available to customize result display.

- *When to use: An effective tool available when you want to see a list of clients with their planned services against their actual service deliveries. Additional filters can be added to limit the results such as a case manager who only wants to see their clients or filtering by a certain provider or date range.*

Care Plan Monitoring Report – A summary listing of consumers displays demographics and detailed information on care plans that exist in the criteria selected. Extensive filtering options are available to limit the resulting data, and grouping and sorting options are available to customize result display.

- *When to use: You want to see a list of clients and their care plan details. Additional filters can be added to limit the results such as a case manager who only wants to see their clients or filtering by a certain provider or service plan date range.*

SAMS Suspended Service Plan Report – A listing of consumers displays the service suspensions entered. Extensive filtering options are available to limit the resulting data.

- *When to use: You want to see a list of the consumers that have suspended services meeting a certain criteria. Additional filters can be added to limit the results such as a case manager who only wants to see their clients or filtering by provider or suspension date range.*

Billing Reports

Consumer Co-Payment Report – A listing of consumers displays the total co-pay amount due for cost-shared services delivered in the reporting period. Selections need to be entered for the agency and the service period. Additional options are available to group and sort the result display.

- *When to use: An effective tool to use for invoice reconciliation when you want to see a list of clients that received cost-shared services from an agency in a certain month and list their service cost and co-payment due.*

Co-pay Statement of Invoice Reprint – An alternate method of generating one or more consumer co-pay invoice printout by invoice date. Additional filter by invoice agency is available.

- *When to use: You want to print out a set of co-pay invoices from an agency.*

Invoice Item Report – A listing of invoices grouped by month displays the units and amounts invoiced, paid amounts, and any balance due. Limited filtering options are available to narrow the results by characteristics of the invoices. Additional options are available to include and display more information on the consumers, services, and totals.

- *When to use: An effective tool to use for invoice reconciliation when you want to see a list invoices that meet a certain criteria and list the service units and costs invoiced, any payments entered, and total amounts due.*

Payment Report – A listing of payments displays the date of payment, the payer and payee, amount applied and method of the payment. Additional filters are available to limit the results by the characteristics of the payments.

- *When to use: You want to generate a list of all payments entered that meet a certain criteria such as limiting the organizations to include or the date range the payments were entered.*

Activities & Referrals Reports

Consumer Activity/Referral Mailing Labels – A listing of 3 X 10 Avery 5160 labels for consumers with address details based on activities entered. Extensive filtering options are available to limit the resulting data, and grouping and sorting options are available to customize result display.

- *When to use: You want to generate mailing labels for consumers that have activities entered meeting a certain criteria such as activities of a specific type that are due in a certain time period.*

Consumer Activity/Referral Report – A listing of consumers displays the details for activities entered based on criteria selected. Extensive filtering options are available to limit the resulting data, and grouping and sorting options are available to customize result display.

- *When to use: You want see a list for consumers that have activities entered meeting a certain criteria such as activities of a specific type that are due in a certain time period. A case manager may want to see home visits that are due this week.*

Administrative Reports

Administrator Mailing Label Report – A listing of 3 X 10 Avery 5160 labels for organization address details. Filtering options are available to limit the resulting data by organization or location, and grouping options are available to customize result display.

- *When to use: You want to generate mailing labels for agencies, providers or care managers entered into the SAMS Administrator.*

Providers and Services Report – A listing of providers and their associated services as entered in the administrative setup. Limited filtering options are available to narrow the resulting data, and additional options can be set to customize the result display.

- *When to use: You want to create a list of providers and their associated service detail as entered into the SAMS Administrator.*

I&R Reports

SAMS Agency Call Report – A summary table outlines the number of calls received by caller type and displays totals for call counts and minutes per month. Filtering options are available to limit the resulting data.

- *When to use: You want to see a breakdown for what types of callers are tracked for I&R meeting a certain criteria such as displaying the call totals received from a provider over a specific date range.*

SAMS Call Follow-up Report – A listing of consumers displays the follow-up activities that have been created in call sessions. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- *When to use: You want to see a list of all follow-up activities that are open from the call sessions based on certain criteria such as a case manager that wants to see any activities that need more information sent to the consumer being the user entering the call (agent), and filter to only show a specific date range.*

SAMS Call Mailing Label Report – A listing of 3 X 10 Avery 5160 labels for consumer and/or caller address details as entered in call sessions. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- *When to use: You want to generate mailing labels for clients and/or callers that were entered in call sessions such as creating labels for follow-up mailings.*

SAMS Call Profiler Report – A listing of call session counts based on the grouping selection. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- *When to use: This simple but powerful report allows you to profile the number of calls received by a variety of groupings such as the types of calls, the agent entering the calls, the location of the callers, and more.*

SAMS Call Referral Report – A basic cross-tab displays call session counts based on the row and column selections. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- *When to use: You want to see the number of calls received in a cross-tab including selections such as the providers or services referred, consumers, or the agents entering the calls.*

SAMS Call Summary Report – A detailed summary report for each call session entered based on the criteria selected. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- *When to use: You want a detailed synopsis of the calls that have been entered based on a certain criteria such as calls entered by a particular agent in a specific date range.*

SAMS Call Topic Report – A listing of topics tracked for each call session. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- *When to use: You want a list of topics for the calls that have been entered based on a certain criteria such as calls entered with specific topics.*

SAMS I&R Program Report – A detailed summary report for each I&R provider entered in the SAMS Administrator setup. Filtering options are available to limit the resulting data based on attributes of the providers.

- *When to use: You want to create a detailed directory listing for I&R providers.*