

# **Vermont SAMS Reference Manual**

**March 1, 2014  
V 1.9**

## SAMS

Social Assistance Management Software ( SAMS) is used by the Department of Disabilities, Aging and Independent Living (DAIL), the five VT Area Agencies on Aging (AAA) and providers in DAIL managed programs. SAMS is used operationally to manage Choices for Care, Traumatic Brain Injury services, Attendant Services Program, Office of Public Guardian services, the AAA Older America Act programs and more. SAMS Legacy or SAMS 2 was upgraded to SAMS 3 on January 1, 2014. This reference manual is for SAMS 3 (herein after referred to as “SAMS”).

## SAMS Security

There are multiple levels of security to allow and restrict access to Protected Health Information (PHI) in SAMS.

1. At the global level users’ access to a record is limited by their Agency association. A user cannot see a record in SAMS unless their agency is in the record as a Care Manager, Agency in a Service or Agency on an Assessment.
2. Programs, Assessments, Attachments and many more areas of a consumer record are restricted in the SAMS Administrator.
3. Each SAMS User must login using their unique SAMS Login. Each User Login is assigned an Access Role which allows and restricts what they user can see and do in SAMS.
4. SAMS information is subject to HIPAA. A user should only access consumer information in SAMS when necessary for the consumers care and services. Be mindful when printing or producing reports to limit individual information Protected Health Information (PHI) to only what is necessary.

## About this Manual

This manual is designed to be a **reference** guide for all Vermont SAMS users. While it includes step by step instructions to view, add and update a consumer record it does not include program specific instructions.

**To maintain the SAMS database, ensure quality data, efficient use and HIPAA compliance All VT SAMS Users must abide by the policies set forth in this manual. VT Policies are indicated in the Table of Contents and highlighted in yellow throughout this document.**

Images and information may at times be different than your personal SAMS experience since each SAMS user is assigned an Access Role that allows and limits what the user can see and do in SAMS. Through SAMS administrator, the record content and functions a users sees is limited to only that which the user needs. This helps improve the user experience by simplifying the user experience and protects PHI.

This manual provides recommendations on the order of some fields. You may format SAMS lists and fields to be most effective to meet your needs. All SAMS users can *format* how the grids and fields are arranged. Formatting SAMS will improve the user experience and efficiency in SAMS.

This manual supplements the Harmony SAMS User Guide and builds a foundation for program, role or agency specific instructions. Please also refer to the Harmony **SAMS 3 Keyboard Short Cuts** document available through the portal under Application Support Resources.

# Table of Contents

SAMS.....	2
SAMS Security Overview .....	2
About This Manual.....	2
Table of Content.....	3
Glossary.....	5
Computer Configurations .....	6
Harmony Portal.....	7
Sign In.....	7
Password management.....	8
Forgot Password.....	8
Change Password and Security.....	8
Portal Layout & Use.....	9
Customer Panels.....	9
Harmony Panels.....	9
Portal Sign Out.....	10
Harmony On-Line Trainings.....	11
SAMS.....	12
Login.....	12
Logout .....	12
My Settings .....	12
My Settings Configuration <b>VT Policy</b> .....	13
SAMS Layout.....	15
Help & Troubleshooting.....	16
SAMS Search (Quick, Advanced) .....	18
Consumer List .....	19
Formatting (Grid) Columns.....	19
Filters (Grid) Columns .....	19
Sort (Grid) Columns .....	20
Consumer Record.....	21
Open.....	21
Record Status: Active Inactive <b>VT Policy</b> .....	21
Update Record Status.....	21
Basic Information: All Users <b>VT Policy</b> .....	23
Add Consumer Record <b>VT Policy</b> .....	23
Format Property List.....	23
Potential Duplicates (match).....	25
Care Enrollment.....	26
Edit Default Care Enrollment Add New.....	26
Contacts.....	27
Care Managers.....	28
Add, View Edit.....	30
Provider <b>VT Policy</b> .....	30
Activities & Referrals.....	31
View, Add, Edit .....	31
Assessments Information <b>VT Policy</b> .....	32

View, History.....	33
Navigation.....	34
Add New <b>VT Policy</b> .....	35
Copy.....	36
Mapping Edit, Update.....	37
Care Enrollment.....	38
Care Plans.....	40
View.....	40
Add New (first).....	41
Service Plans.....	42
Add.....	44
Care Plan Copy.....	46
Update/Edit.....	47
File Attachments.....	49
View, Add New, Edit.....	49
Journals.....	50
Reports.....	50
Report Policies <b>VT Policy</b> .....	50
Reports Run Existing.....	51
Reports Build New <b>VT Policy</b> .....	53
Rosters.....	54
Routes.....	54
Service Deliveries.....	55
View.....	55
Add New.....	56
Update.....	57
Caregivers/Care Recipients.....	58
Dashboard.....	58
Saved Searches <b>VT Policy</b> .....	58

## Glossary

**Agency** - An organization contracted by a state or other government body to oversee/supervise the care of consumers within an area or program. Agencies can contract with service providers or act directly as the service provider.

**Assessment** – A form on which to document in SAMS.

**Banner Area** – Area across the top of the screen which includes Search, Navigation Bar and System Controls.

**Care Enrollment** – A “program” (DAIL, AAA, AD).

**Care Plan** – DAIL’s authorization of services. Care plans are only entered by DAIL.

**Care Program** - A unique combination of a level of care and service program.

**Care Manager** – A person and/or agency working with the consumer to arrange for or provide services. There are many types of Care Managers (i.e. Case Managers, TBI providers).

**Caregiver** - Consumers who provide services to other consumers.

**Care Recipient** - Care recipients are consumers receiving services from Consumer Caregivers. In order to track a care recipient and services the Care Recipient is entered as a consumer in SAMS.

**Consumer** - any person in SAMS receiving services, assessments, or who may receive services or assessments.

**Consumer Group** - A collection of several consumers treated as one consumer. Members of a consumer group have something in common, such as attendance at an event or the use of a facility.

**Consumer Record** – The whole record for a Consumer in SAMS. The record contains multiple screens (pages).

**Department of Disabilities, Aging and Independent Living (DAIL)** – Department within the State of Vermont’s Agency of Human Services.

**Delete** –Anything information deleted is permanently removed from the database and cannot be retrieved.

Symbolized in by a red X, deleting rights are very limited. *A red X in SAMS in Look Up fields Clear Contents.*

**Flyout Sidebar** – contains hyperlinks to Recently Opened items, frequently used Tools such as My Settings, Advanced Search and Workflow.

**Grid or List Grid** – Lists comprised of columns of information such as the Consumer List.

**Location** - Address information. address information which includes additional data such as Directions, Neighborhood, and municipality.

**Level of Care** - Top-level classification defining the program, level of care and funding source.

**Municipality**: Used for the DAIL Choices for Care program coverage areas.

**Navigation Bar** – located within the Banner Area allows users to can quickly move to sections of SAMS.

**Panels** – Term used to describe the sections throughout the Harmony Portal and SAMS application.

**Portal** – Harmony Portal replaces (is the new) agingnetwork.

**Register** – Harmony’s term to add a new consumer or consumer groups.

**Roster** - A pre-defined list of consumers used to record service delivery information quickly.

**Route** - A list of consumers, usually with one or more common attributes, that users can custom sort.

**Service Delivery** – Service(s) that have been delivered to a Consumer.

**Service Plan** – DAIL authorized services within a Care Plan.

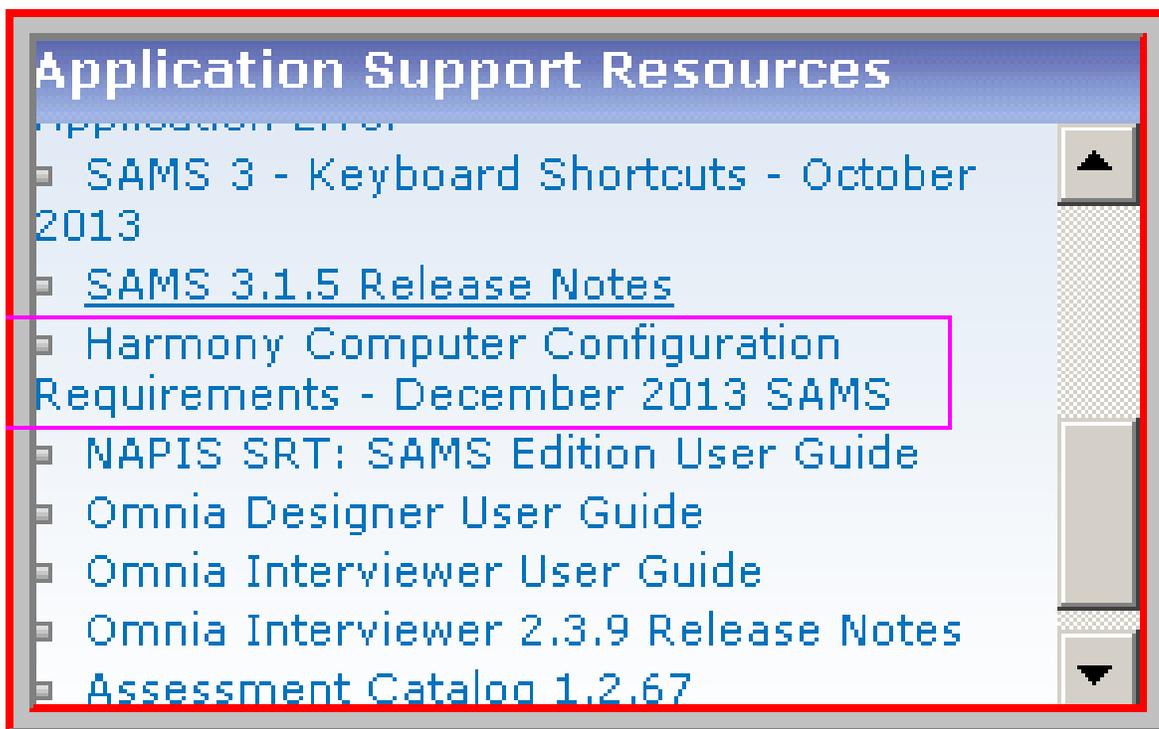
**System Controls** – Located in the top right corner of SAMS, system controls include Username, database, and links to My Settings and Help.

## Computer Configurations

In order to Access (View), Review, Print and Export from SAMS and other Harmony applications refer to the Harmony Computer Configuration Requirements and make appropriate setting changes.

You can access the “Harmony Computer Configuration Requirements” document through the Harmony Portal.

Harmony posts updates as they occur. If you are having problems viewing reports, attachments or printing refer back to the configurations requirements through the portal for the most recent instructions.



## Harmony Portal

The Harmony Portal (herein after referred to as the “Portal”) is the access point for Harmony resources, notices and application links; including SAMS. The Portal is Agingnetwork (AN) redesigned.

The DAIL Portal is accessed by DAIL and VT SAMS Providers, except for the Area Agencies on Aging (AAA). Each AAA has its own Portal. SAMS utilizes Microsoft Silverlight. The link for the Silverlight download is available through the Portal.

Omnia Interviewer (OI) continues to use the Citrix web plug in. OI will continue to require Citrix until Harmony releases OI upgrade expected in 2014. OI is only used to Export and Import assessments.

The Portal is associated with the AN user (license) on file at Harmony. Through the Portal each AN user can manage their own password including forgotten passwords.

### Signing in to the Portal for the first time

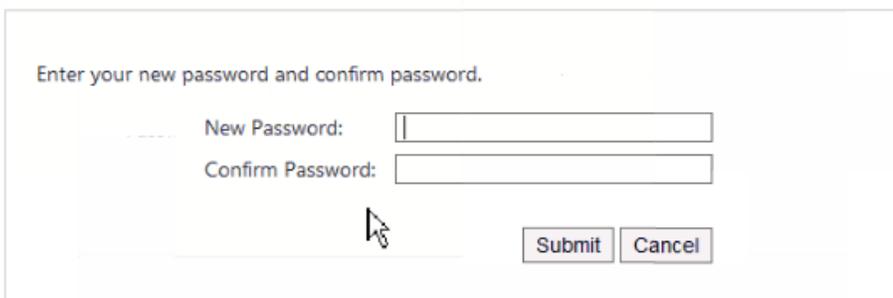
Go to <https://Portal.harmonyis.net>

- Enter your User name: Your current AN User name
- Enter you Password: Your current AN Password
- Click Sign In



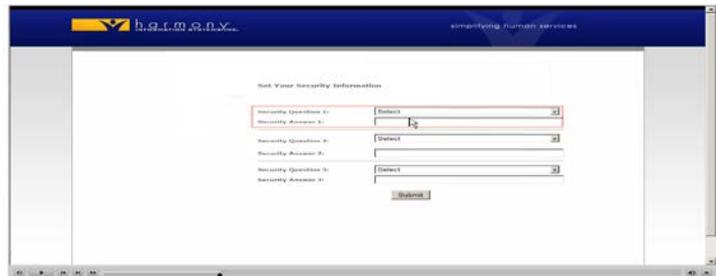
- You may be prompted to reset your Password If so, enter a New Password and Confirm Password. Make sure to create a complex password that includes letters, numbers and/or symbols.

*Note: If you share Agingnetwork (AN) licenses your agency must have a process for managing the shared AN accounts including passwords. VT Agencies using SAMS are encouraged to purchase a AN license for each user. Each SAMS user has a unique SAMS Username and Password. **Do not share SAMS accounts.***



## Password Management

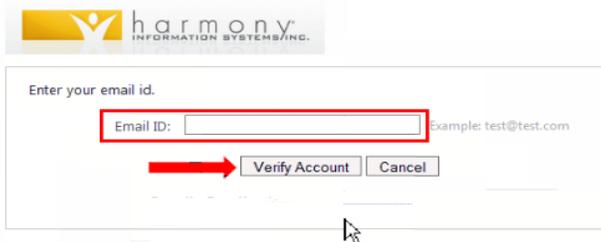
- The first time you login to the Portal you will be prompted to set up Security Questions. You must enter at least one (1) security Question and Answer.
- Select the **Question** you want to use and enter the **Answer**. You must remember your answer!
- Click **Submit**



## Forgot Portal (AN) Password

If you forget your password you can reset your password in the Portal Sign In screen.

- Click **Forgot Password**
- Enter your email address (must be the email of the person associated with the AN account at Harmony. Check with your agency SAMS administrator\lead or for shared accounts.
- Click Verify Account



- Answer Security question(s)
- Click Submit
- A New Password will be emailed to you
- Check your email for your new password
- Go back to the Portal Sign In and enter your new password
- Click Sign In



## Change Password or Security Settings

To change your Portal Password or Security Questions click on [My Configuration](#) found in the Upper Right hand corner of the Portal.

Harmony does not support sharing Portal (AN) accounts. One user is assigned to each account. The user's email is associated with the AN account. If your organization shares AN accounts they must decide who is assigned to each AN account. The person assigned to the account must manage the password. If you are having a problem logging in and you use a shared AN account, contact your Agency SAMS Administrator, not Harmony.

### **Bookmark This Page**

Add the Portal link to your favorites by clicking [Bookmark This Page](#) found in the Upper Right hand corner of the Portal.

### **Portal Layout and Use**

After you Sign In you will be taken to the Portal's main page.



The Portal main page consists of **panels**. In the image above the Application Links panel outlined in red.

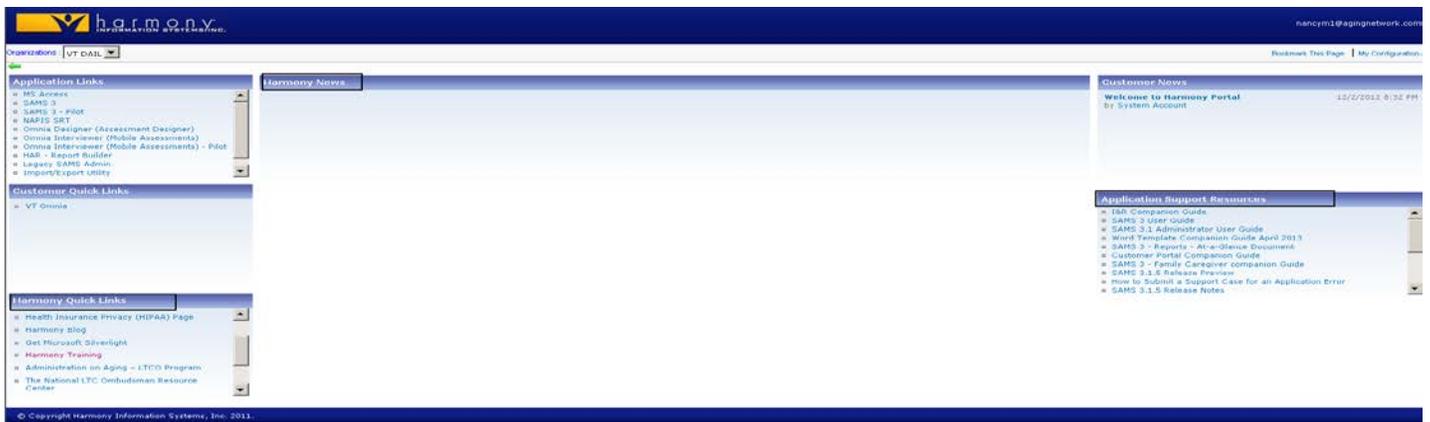
The **Application Links** panel includes all of the applications the Portal account is authorized to use. Review the list of applications. If you are missing an application please contact your Agency SAMS administrator. If you share a Portal you may see applications you do not use. Do not attempt to use any applications you have not been trained to use.

### **Customer Quick Links and Customer News Panels**

These panels will soon be managed by the DAIL SAMS administrator for the DAIL Portal. Each AAA SAMS administrator manages their Portal customer panels. The administrator can add links to the Customer Quick Links such as this manual. The administrator can add information to the Customer News panel for timely communication. Check the Customer News Panel when you log in for new information.

### **Harmony Portal Panels**

Harmony manages the Harmony Quick Links, Harmony News and Application Support Resources panels.



The Harmony Quick Links panel includes important links including but not limited to:

Harmony Support – Customer View Tool: used when accessing Harmony support this link will allow Harmony support staff to see your computer screen

Get Microsoft Silverlight: software necessary to access Harmony applications such as SAMS

Harmony Training: These are short on-line trainings broken into the different function areas of SAMS. **Right click** when opening the Harmony Training link to Open in a New Tab or New Window.

- Click on the arrow to the Right of SAMS to expand the list of training modules links
- Click on the training link

The training will open in a new browser tab or window



Participate in all the trainings that include topics for your use of SAMS. The Harmony Trainings may be FREE for use for limited period of time.

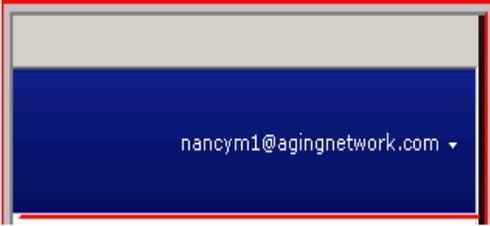
### Application Support Resources Panel

Click on the SAMS User Guide for SAMS assistance. This is a Harmony guide and is written for all SAMS users' not just VT users therefore they will not include VT program or specific instructions.

### Harmony News Panel

This is where Harmony will share important information on product updates and maintenance windows.

### Sign Out of the Portal



Always Sign Out of the Harmony Portal when finished working in SAMS or other Harmony applications.

Click on your agingnetwork username in the upper right corner.



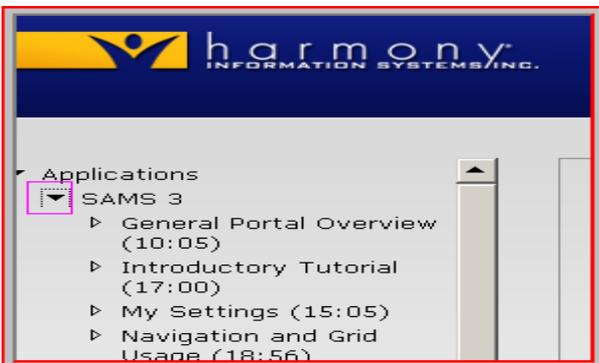
- Click on Sign Out

## Harmony On-Line Trainings

All SAMS users are expected to attend all applicable on-line Harmony trainings **before** using SAMS.

The on-line trainings are available through the Portal. The trainings are free. The trainings are designed to cover specific areas of the SAMS application. Complete all the trainings related to your use of SAMS. Harmony trainings are generic for all SAMS users across the United States. **The Harmony trainings do not have VT specific instructions.**

- Right click on the **Harmony Training** link in **Harmony Quick Links** and **Open in a New Tab**
- Click on the new browser tab
- Click on the ► to the left of SAMS
- Click on the applicable trainings
- The training will open in a new browser tab or window
- Click on the tab for the training



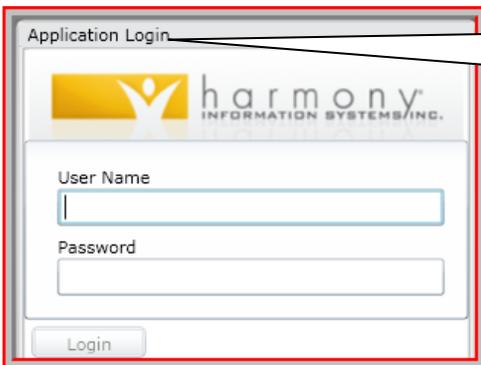
If the Harmony Trainings are not working for you check your PC configurations against the Harmony PC Configurations Requirements document on the Portal under Application Support Resources. IE 10 has compatibility settings.

## SAMS

After you have taken the on-line Harmony SAMS trainings log in to SAMS. From within the Portal, in the application links panel, click on SAMS.

### Login

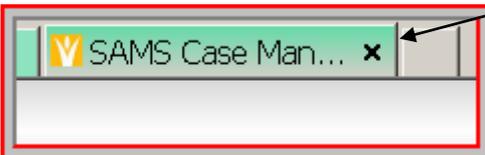
- Enter your SAMS User Name
- Enter your SAMS Password
- Click Login (or Enter on your keyboard)



Hint: If you forget which login this is notice **Application Login**. The application is SAMS or Omnia Interviewer

### Log Out

- To exit SAMS save your work then click the X in the browser tab

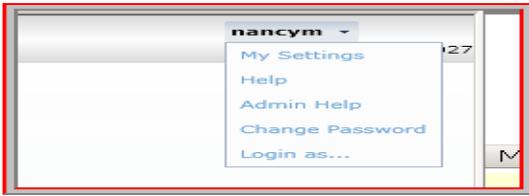


### My Settings

Customize the look and feel of the application as well as set Default Settings to save time and reduce errors. My Settings is applied to the SAMS user. Personalize font size and color to your preference. SAMS has four My Settings areas to configure.

There are **two** ways to get to My Settings

1) My Settings can be found on the drop down list next to the SAMS User Name in the upper right hand corner of the SAMS screen. Click on the arrow ▼ next to the user name for the drop down list. Click on My Settings.



OR

2) Left hand side of SAMS screen. Click **Tools**, Click My Settings.

## **My Settings Configuration: VT Policy**

### **Grid Settings: All users**

Choose the look of the Rows, Caregivers, and Rosters that appear in the grids and preview the results on the right before saving.

**Rows per Page** – SAMS utilizes **pages** to displayed results. **Rows per Page** is the number of records that will be displayed per page. The maximum number of Rows per Page is 500. To change the number of rows per page displayed, use the up and down arrows or click in the field or enter the number using your keyboard.

### **Default Settings: Must set for users that enter new Consumer Records**

Default settings automatically enter the chosen values when creating a New Record. **It is very important that certain Default Settings are left blank and others are filled in correctly for proper and effective use and to reduce errors in the VT SAMS Database.**

Configure your Default Settings as described below:

- Agency – Leave blank **VT Policy**
- Provider – Leave blank **VT Policy**
- Care Manager – Optional: if you choose to fill in the Care Manager field, each time you create a new consumer, the default Care Manager will populate in the new record. **Recommendation:** Choose your Agency Acronym Care Manager (i.e. CVCOA Agency) as the default setting. Otherwise leave blank.
- Care Program - Choose the Care Program you enter most frequently. If you create a new record that should not include this default Care Program, edit the Care Program in the **Care Enrollment**. **You must choose one care program.**
- State – Vermont
- County – **Recommendation:** leave blank unless you only enter data on consumers that live in one county
- Area Code – 802
- Service Delivery Month – **Recommendation:** Use Current Month
- Info Release Authorized – Yes
- Module- (optional) this is the area of SAMS that will open when you log into SAMS. If you want SAMS to open to a specific area listed on the Module drop down list (e.g. Dashboard or Consumers) you may choose that area. If you choose (None) SAMS will open to the main screen and you can search using the global search. It may take a little longer for SAMS to load if you choose a module.

### **Care Plan Settings: Must be set for users that enter Care Plans**

If you enter Care Plans set:

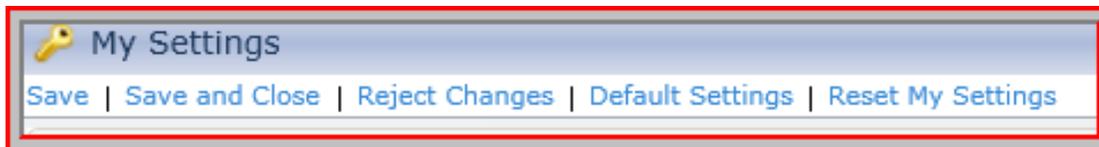
- Default Duration (Monthly): 12 (for plans authorized for a year)
- Default Start Date for New Service Plans: Start Date of Care Plan

### **Assessment Settings: Must be set by users that enter Assessments**

- Update Consumer Record? – Most Recent Only **VT Policy**
- Required Question Prompt – Yes
- Default Assessment Form – If you use the **same** assessment form for the majority of the assessment you complete you may want to choose that assessment form here. When you create an assessment, SAMS populates the default assessment form. You can edit the form before you save it. If you use many different forms it is best to leave this field blank.
- Default Reassessments Date (Months)-Enter the number of months you generally reassess. When you create an assessment the Next Assessment Date will auto populate based on this setting. This may vary depending on the program and assessments you work with. You can choose the number of months or leave blank.
- Highlight Selected Question and Responses- Personal preference try it out!
- Navigate to Next Question/Section with Enter Key – Recommended if you like to use your Enter key
- Font Zoom – Personal preference
- Start Up Mode – Personal preference
- Medication List Default Number Taken – leave 0.000
- Medication List Default Route – Leave blank
- Medication List Default PRN – Leave Don't Know

### **Save My Settings**

When you finish configuring and are satisfied with your settings click Save and Close. Please refer to the Harmony SAMS User Guide for a description of the other action options.



You can go back to My Settings anytime to change them.

***HINT: When entering information in SAMS if you notice that a setting is not as you set in My Settings (i.e. Default Reassessment Date (months)) go to My Settings, review all of your settings and reset as needed.***

## SAMS Layout

The image below shows the Quick Links pinned and the Consumer List Grid open. When the Flyout Sidebar is unpinned the sidebar tabs will be on the left side of the screen.

The Flyout Sidebar includes **Recently Opened**.

**Recently Opened** is a time saving feature that records where you have been in SAMS during that session. You can click on any item in Recently Opened links to return to that area of SAMS. When you close out of SAMS the Recently Opened links are cleared. ***HINT: Recently Opened is a time saving function.***

**Navigation Bar** provides access to the main areas in SAMS.

**Work Area** manages Consumer records, service records, care plans, assessments, attachment and journals.

The screenshot displays the SAMS interface. At the top is the Navigation Bar with a search field and menu items: My Dashboard, Consumers, Calls, Routes, Activities, Rosters, Reports, More. The user is logged in as Sysadmin Account (EDUCATION 3.0.9.46438). On the left is the Flyout Sidebar with Quick Links and Recently Opened sections. The main area is the Consumer List Grid, sorted by Name, showing columns for Row Actions, Consumer Type, ID, Name, Gender, Date Registered, Address, County of Residence, and Town of Residence. A callout box points to the Row Actions menu, listing Open, Print, and Delete. The grid shows a list of consumers, with one entry for 'Work Area' highlighted in red. The bottom of the grid shows page navigation: 1 to 50 of 983 Consumers, Page 1 of 20.

pages

### Page Navigation

Notice the pages at the bottom of the **work area**. Large lists that exceed the maximum number of records displayed per page are broken out into pages. *Reminder: set the number of record in Rows per Page in My Settings.*

## Help and Trouble Shooting

There are many resources for SAMS assistance. Please carefully review the options so you know which one to utilize depending on the circumstances.

- Harmony SAMS User Guide- produced by Harmony this guide is for all Harmony SAMS customers across the country. It does **not** include VT specific instructions, configurations and settings. The User Guide is available through the Portal in the Application Resources panel and from within SAMS by clicking on Help. Help is located on the drop down menu at the user name located in the top right corner. When you click on Help a new internet tab or window (depending on your internet settings) “Webhelp” will open. You can search for your particular question. This is a good resource while in the application.
- Harmony Trainings- on line training for all Harmony users that provide a quick visual and verbal refresher on many topics.
- VT SAMS Reference Manual- This manual includes definitions and procedures specific to SAMS use in VT. It is designed for **all** VT SAMS users so it does not provide information specific to each user role, programs or agency. This manual is posted on the DAIL website and the Portal in the Customer Quick Links panel.
- Agency, Role and/or Program Specific Instructions- designed to provide a level of information specific to user roles and VT programs and procedures. Program and service level instruction. Under development
- Harmony Customer Support- Harmony Customer Support over the phone or though email. Your agency pays for this service through the license fees. Phone support is available Monday through Friday (except holidays) 8:00 AM to 9:00PM toll free by calling 800-318-7260. You can submit a Harmony Support email any time [support@harmonyis.com](mailto:support@harmonyis.com). Call Harmony if you experience an **Application Error**, get a message that states to **Contact the Administrator**, or SAMS function questions not specific to VT procedures. Please **also** inform your agency SAMS administrator (AAA only) or DAIL SAMS administrator if you encounter a SAMS problem that interrupts regular program operations & processing (e.g. service requests) that will negatively effect the people we serve if Harmony was not able to resolve the problem. *Note: Through the Harmony support- Customer View Tool you can allow support staff to view your computer screen. This new tool helps bridge gaps in terminology.*

- Agency SAMS Administrator or SAMS expert: Each Area Agency on Aging (AAA) has a designated SAMS administrator. The AAA administrator manages SAMS user accounts for their agency, bring ideas to the SAMS user group and provide support to their users. AAA staff should contact their administrator for the following types of issue: duplicate records, problems navigating SAMS, problems creating an assessment, clarification of procedure, saved searches, deleting, and dashboards.
- Other provider agencies have in-house “lead” staff to provide in- house support.
- If you are unable to resolve a DAIL program question or problem through the manuals and in house support contact the DAIL program lead.
- DAIL SAMS Administrators (DSA)– These staff are responsible for the global SAMS administrator responsibilities. DSA provide support to the SAMS AAA administrators, agency SAMS leads and DAIL program staff as needed for consultation, program changes, DAIL SAMS user changes, innovative SAMS ideas, access role, reason, type and category additions.
- All agencies must contact DSA to add a new Portal (AN) user.
- Non-AAA Provider agencies must contact DSA to add additional SAMS users, interest in Omnia Interviewer or become a VT DAIL SAMS user.
- When seeking assistance with SAMS, **if a consumer record is involved be mindful to ONLY use the SAMS Consumer ID** in emails, faxes and other mean of unsecure communication. The SAMS consumer ID is all that is needed to identify a consumer record in SAMS.

### **Rules of Thumb for All Users**

- Status Date is SAMS with one exception is always to be entered as Today’s Date, the date of data entry. The one exception is the Status Date in Consumer Details, Basic Information. This date represents that status date of the entire record. When a record is deactivated for either reason of Death or Moved out of State the Status Date is to be the actual Date of Death or the date they moved.
- Always enter as much Basic Information as possible.
- Never change your SAMS or Omnia Interviewer Username or Password.

## **Search**

SAMS contains powerful global search functions that allow you to search consumer and service records to quickly find information. SAMS offers two Search modes: Quick Search and Advanced Search.

All searches are constrained to those consumer records and fields the user is allowed to see by security permissions. For example, if users may only access consumer records enrolled with a specific provider, they will not find consumers enrolled only with other providers, even if the record exists in the database.

### **Quick Search**

The Quick Search field is always available in the top left corner. To use Quick Search begin typing relevant information in the search bar. You must enter at least 3 characters.

Examples include:

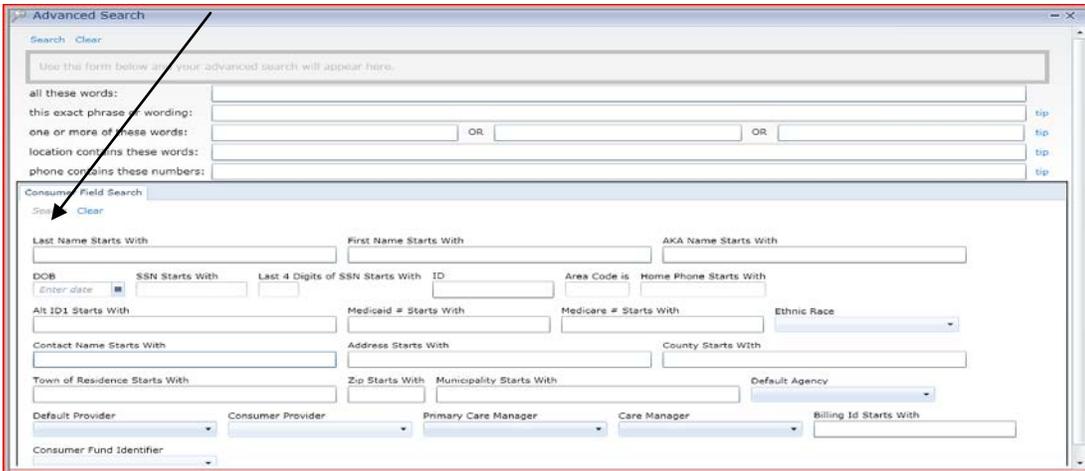
- Last name, first name
- First 3 letter last name , first 3 letter first name
- Social Security Number (do not need to enter dashes)
- DOB enter dashes (11/17/1917)

SAMS will search for possible matches as you type and display them in a list below the search bar. Click on the displayed to open the record. If there are no matching results try other search information.

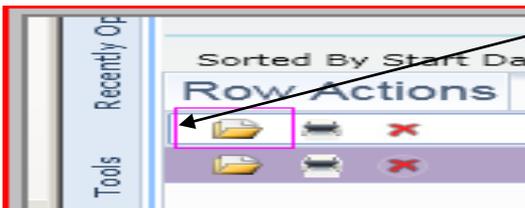
### **Advanced Search**

- Click on **Advanced** below the Quick Search
- Enter the search fields
- Click Search





To Open a record double click on the record or click on the **open folder** icon in **Row Actions**.



When you go back to Advanced Search you must to **Clear** before starting a new search.

## Consumer List

Click on **Consumers** in the navigation bar to see the consumer list  
 To get the most from the consumer list format columns and use filters.

**Format Columns (Consumer):** *Formatting is available in many areas of the SAMS application*

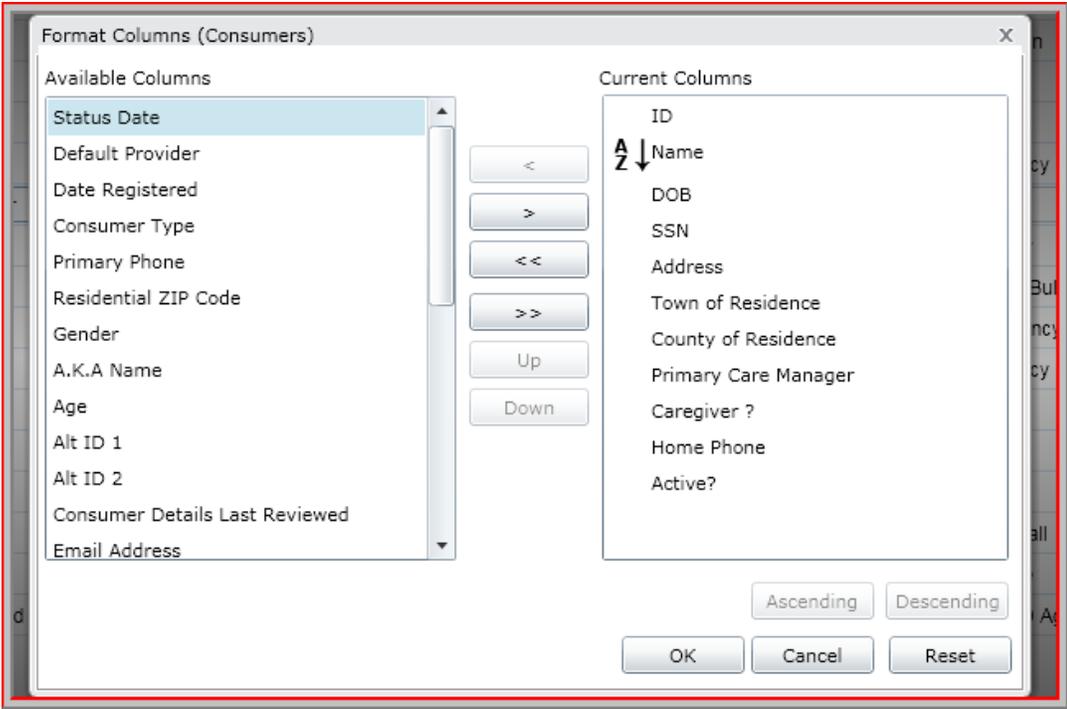
Click on Format Columns in the Consumer list toolbar (*image page 21*)

In the Format Columns (Consumer) pop-up choose the columns you want listed in the Consumer List and move them using the < > arrows to the Current Columns box. Any fields that you do not care to see on the Consumer List move to the Available Columns box.

Next arrange the order of the Current Columns. Highlight the field and move by using the Up or Down

When you have the fields in the order that you want them click OK

Once you format the columns they will remain in that order until and if you change them.



**Filter Consumer List:** All SAMS lists (grids) can be filtered (additional image page 21)

All columns except Row Actions can be filtered. You can have a filter set on each column. Use filters to narrow down the Consumer list for a specific group of records. Example: Filter for all Active consumer that live in a specific town and are over the age and have a specific primary case manager.

To set a filter click on the funnel  in the column header  
Enter the criteria and click Apply Filter

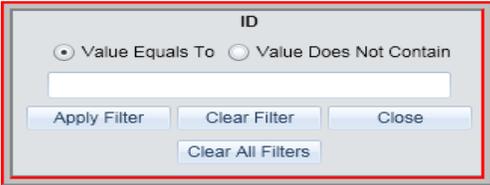
Funnels are dark when on 

To clear multiple filters click on a funnel

**Sort Consumer Columns:**

You can set a sort on **any** column by clicking in the column header. A ▲ in the column header indicates it is sorted.  You can click again to arrange descending.

**Format Columns** 



and Clear All Filters

Consumers

Sorted By Name

Consumer Type | Add New | Open | Delete | Print | Format Columns | Print Grid | Refresh | Export Grid | Open Audits

Row Actions	Consumer Type	Active?	ID	Name	Date Registered	Address	Town of Residence	County of Residence	Home Phone	Status Date
	Consumer	<input checked="" type="checkbox"/>	131204806	Asisima, Klaus D	06/01/2011	184 Center Street	Philadelphia	Philadelphia		06/01/2011
	Consumer	<input checked="" type="checkbox"/>	319188175	Abernathy Jr, James J	01/01/2000	744 Cherokee Dr.	Koppel	Beaver	(123) 445-8175	01/01/2005
	Consumer	<input checked="" type="checkbox"/>		Alman R	01/01/2005	1326 E. Main Street	Aliquippa	Beaver	(123) 445-4529	01/01/2005
		<input checked="" type="checkbox"/>		Drucilla		Route 1			(123) 445-9090	01/01/2005
		<input checked="" type="checkbox"/>		Imogene		418 Gle			(123) 445-2064	01/01/2005
		<input checked="" type="checkbox"/>	316355107	Adcock, Mildred		426 On	Gettown		(123) 445-5107	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	407077400	Alexander, Frances	01/01/2005	29 Head Homes	Ambridge	Beaver	(123) 445-7400	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	501354420	Allen, Charles	01/01/2005	140 Thomas Road	South Heights	Beaver	(123) 445-4420	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	311141268	Allen, H. O	01/01/2005	1002 Hunt Street	Baden	Beaver	(123) 445-1268	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	121145809	Alsop, Lillard L	01/01/2005	6921 Lebanon Road	Hookstown	Beaver	(123) 445-5809	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	114208203	Alsop, Mary	01/01/2005	6921 Lebanon Road	Aliquippa	Beaver	(123) 445-8203	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	428261159	Alvis, Lloyd	01/01/2005	138 East Franklin, Apt 600	South Heights	Beaver	(123) 445-1159	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	503162667	Ambrose, Jessie	01/01/2005	627 Eastview Drive	Baden	Beaver	(123) 445-2667	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	507194547	Anderson, Alma R	01/01/2005	115 Thompson Aly, Apt A-1	Monaca	Beaver	(123) 445-4547	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	401140375	Anderson, Ann	01/01/2005	138 East Franklin, Apt 614	Baden	Beaver	(123) 445-0375	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	301267732	Anderson, Clara	01/01/2005	7307 Cox Pike Nw	Darlington	Beaver	(123) 445-7732	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	125245041	Anderson, Edward B	01/01/2005	7307 Cox Drive Nw	Baden	Beaver	(123) 445-5041	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	325184640	Anderson, Eliza	01/01/2005	201 Richland	Fombell	Beaver	(123) 445-4640	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	319042576	Anderson, Era	01/01/2005	212 North Boyers Avenue,	Monaca	Beaver	(123) 445-2576	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	422242818	Anderson, Evelena	01/01/2005	7321 Old Clarksville Pike	Clinton	Beaver	(123) 445-2818	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	510127113	Anderson, Fannie	01/01/2005	1107 E. Railroad	Aliquippa	Beaver	(123) 445-7113	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	110275739	Anderson, Maudie	01/01/2005	211 20th East	Freedom	Beaver	(123) 445-5739	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	305101529	Anderson, Willie M	01/01/2005	Abernathy Road	Koppel	Beaver	(123) 445-1529	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	309299767	Angela, Dorothy	01/01/2005	Boyers Avenue,	Georgetown	Beaver	(123) 445-9767	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	427270308	Arb, Frank	01/01/2005	300 White Ln.	Fombell	Beaver	(123) 445-0308	01/01/2005
	Consumer	<input checked="" type="checkbox"/>	511282317	Armstrong, Mattie	01/01/2005	105 Bakerville Rd.	Clinton	Beaver	(123) 445-2317	01/01/2005

Page Summary

1 to 50 of 974 Consumers

Page 1 of 20

*HINT: Columns can be sorted in all SAMS lists (grids)*

## Consumer Record

Open Record  
From Search results

- Using a mouse, click on the correct record in the search results
- Using the keyboard, use you arrow keys to move down the results list. On the correct record hit the Enter Key.

From the Consumer List – record highlighted

- Click the open folder icon in Row Actions, OR
- Double Click on the record, OR
- Right Click on the record and choose Open or Open to, OR
- Click Open on the Consumer List toolbar, OR
- Click on the ▼ to the right of Open and choose which area of the record you want to open to

***HINT: These Open options are available throughout a record and SAMS***

**Record Status: Active Inactive VT Policy**

A consumer record in SAMS has an Active status until the person either:

- Dies or
- Permanently moves out of state

**Update Record Status:**

- Open the record
- Click Open next to Basic Information
- Active – uncheck box to remove check mark
- Reason- choose from drop down (Deceased or Moved Out of State)
- Status Date – enter the date the person died or moved
- Click Ok
- Save and Close record

**Navigating in a Consumer Record**

Simply click on the area of the record you want to navigate to. Users will have access to different record areas based on their access role in SAMS.

**Details Area**

Left side: Basic Information (demographic), NAPIS, Characteristics, User Fields

Right side: Current: Care Enrollments, Care Managers, Directions to Home, Ethnic Races, Locations, Contacts, Notes, Providers (if entered in the record)

View Options: Block or Grid (personal preference)

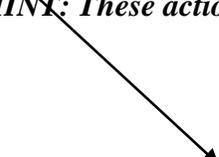


Click on  to change the view from and to Grid or Block

When in Grid, you can format the columns

**Action Links** are used to Save, Close, Add New etc. in area of the record you have accessed.

***HINT: These actions links are available throughout the SAMS application.***





To **Edit** information including Name, DOB, SS#, NAPIS, User Fields and status of the record. Click Open in the top right corner of the Basic Information panel.



When Open, scroll to the bottom and Click on Format Property List to chose the fields and order.

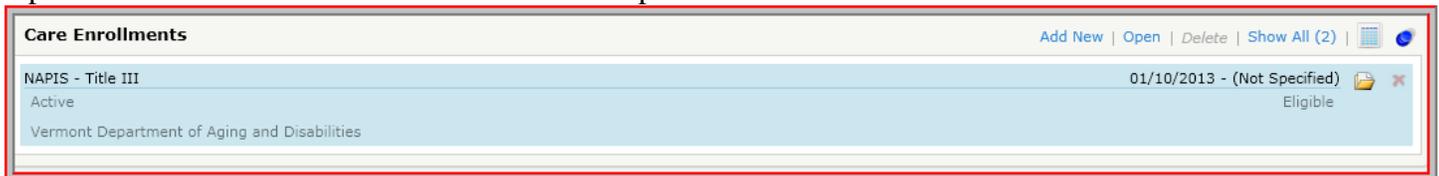
Care Enrollments, Care Managers, Directions to Home, Locations, Notes, Phones, Providers, Contact, Caregivers, & Care Recipients are located on the right side of the screen. You will have to scroll down the page to see all panels and information.

**HINT: These Panels are not displayed until information has been entered.**

### Details

The Details Area includes: Basic information, current care enrollment, care managers, Contacts, Location, Providers, Directions to Home, Caregivers, Care Recipients, Ethnic Races, Notes, Phone, Recent Activities & Referrals, Recent Assessments, and Current Care Plans.

Open items to view additional information or to update.



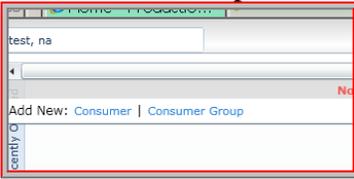
**Basic Information:** All SAMS users have the ability to update basic demographic information including:

- Name
- Date of Birth
- Social Security Number, Address ,telephone

If you are aware that any of these items need to be corrected or updated it is expected as a SAMS Users you will do so. **VT Policy**

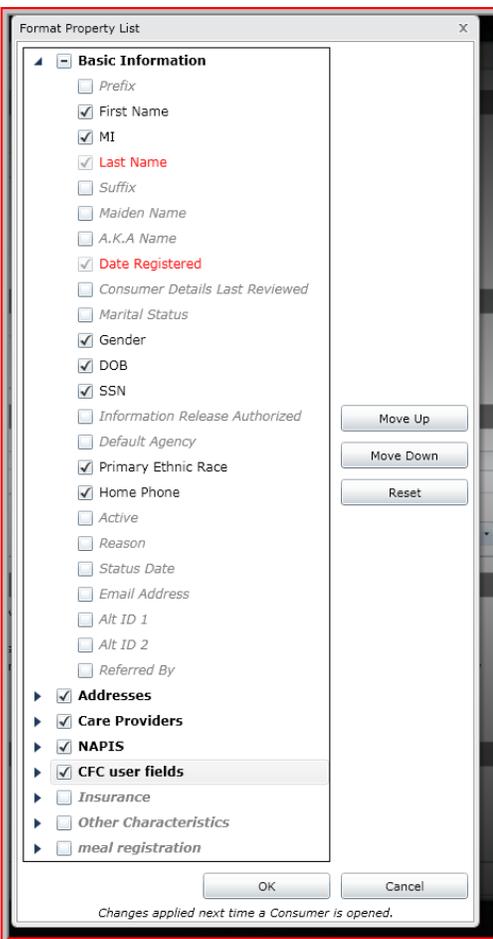
### **Add New Consumer**

After searching SAMS for the consumer, if not found, click Add New: **Consumer or Consumer Group** from the Search results panel.



You can also add a new Consumer from the Consumer List Grid. Click on Add New, choose Consumer or Consumer Group from the drop down list. Make sure that you have **searched** for the Consumer **before** adding a Consumer record.

**Add New Consumer: Pop up box**



The **First time** you Add Consumer click **Format Property List** in the bottom right corner.

**Choose** (check the box to the right of the field) and **Order** (Move Up or Move Down) sections for Add Consumer data entry based on your use of SAMS.

Sections of information in Add Consumer:

- Basic Information
- Addresses
- Care Providers: Primary Care Manager
- NAPIS
- CFC User fields
- Meal Registration
- Insurance
- Other Characteristics

Each section expands for entry fields.

The more information you enter in Add New saves times are reduces errors.

Note: As you are entering data, if there are two fields that match an existing record, you will be presented with possible matches when you click in a third field. When this happens a Potential Match message will occur.

You can enter more information in the Add Consumer panel knowing that potential duplicate warnings come as you enter data instead of waiting until you click OK to save the new record.

**Basic Information Field Order: Name fields, DOB, SSN and then other Basic Information fields.**

**VT Policy**

**Enter all information for these sections.**

At a minimum enter: (work with your providers if you are not getting all the necessary information)

### Basic Information- All VT Users

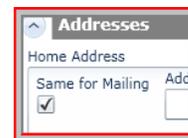
- First Name
- MI ( when available)
- Last Name (system requirement)
- Gender
- DOB
- SS#
- Date Registered (system requirement)

### Care Providers - All VT Users

- Care Manager (AAAs **always** enter your “Agency” Care Manger)
- Do **NOT** enter **Default Provider** (you can remove this field when you format the property list)

### Addresses - All VT Users

- Home Address and Mailing Address (*Click box if the Mailing and Home address are the same*)
- Municipality – Is used for some DAIL programs. *Do not remove.* CFC uses municipality
- NAPIS – AAA Only
- CFC User fields – DAIL CFC Only
- OPG – OPG Only
- Insurance - If known
- Other Characteristics – AAA Only



### NAPIS – AAA only

### Meal Registration – AAA only

### Other Characteristics – If known complete only the following:

- Employment Status
- Cognitive Impairment
- Receiving Social Security
- State Resident – Checked by Default
- Understands English – Checked by Default
- US Citizen? – Checked by Default
- Veteran?
- Primary Language – Defaults to English

### **Potential Duplicates (Match)**

Potential duplicates are identified as data is entered when adding a Consumer Record (Add Consumer). When the system detects a potential duplicate the Potential Match message occurs. As you enter information to Add Consumer the database searches for potential matches. Therefore it is important that you enter as much information in Add Consumer as possible.

If the system detects potential Matches it will display the possible duplicate records at the bottom of the Add Consumer field.

The screenshot shows the 'Add Consumer' form with several sections: Basic Information, Addresses, Care Providers, Other Characteristics, meal registration, Insurance, and NAPIS. At the bottom, a warning message states: 'There are potential matches or SSN already exists.' Below this message is a table of potential matches:

Enrolled?	Client ID	Full Name	AKA Name	Agency	DOB	SSN	Town	Home Phone
	101536789	Aardvark, Abel A Able			01/01/1953	123-45-6789	Glover	(802) 123-1234

- Review the information in the potential matches list.

**If one of the matches may be the same person Open the record.**

- Click on the Open Folder icon or double click on the record.

You will get the following message:

The dialog box titled 'Open Matched Consumer' contains the following text: 'Opening an existing consumer will cancel the creation of this new consumer. Do you want to continue?' At the bottom right, there are two buttons: 'OK' and 'Cancel'.

- Click Ok (this will open the Matched record and cancel the Add Consumer information you entered)

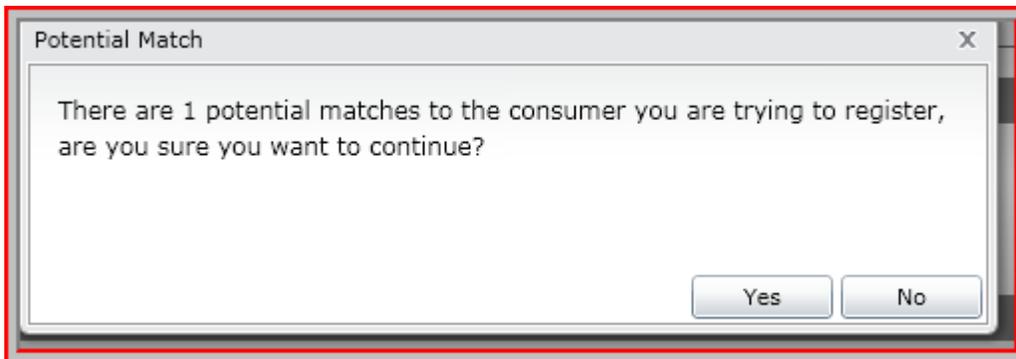
Review the record to determine if it is the same person.

If it is the same person review and update or correct as necessary.

- Basic Information
  - Do not change Registered Date
- Other Details (i.e. Location)
- Add the new Care Enrollment
- Add Agency as Care Manager
- Add actual Case Manager as Care Manager (if known and applicable)
- Continue with other entry (i.e. assessments, service delivery)
- Save and Close

If the Opened Match Consumer is NOT the same person.

- Close the Match Consumer Record
- Add New Consumer
- When you finish entering Add Consumer information click OK
- If there is a Potential Match listed when you click OK the message below appears. If you are sure that you are not creating a duplicate record click Yes. By clicking Yes the new Consumer Record is saved to the database.
- The new record will open to the Details screen.



### **Care Enrollment: Default Care Enrollment (Add New Consumer)**

SAMS will not save a new consumer record without at least one care enrollment. When you Add Consumer a Care Enrollment will be auto populated based on your Default Settings. After you complete “Add Consumer” edit the Care Enrollment as needed for dates, status, reason and in some cases program (not applicable for all Care Enrollments).

### **Edit Default Care Enrollment (Add New Consumer)**

Open the care enrollment to edit the program, dates, status and reason.

- Double click on the enrollment OR
- Click Open OR
- Click the open file folder icon

Edit fields as necessary  
Click OK

Status Date is always to be entered as Today's Date; the date of data entry

Click on the ▼ next to Add New to add other Details page information.

If you added the Care Manager, Address (location) and Phone in the Add Consumer panel that information will already be populated in the record. If not, add from here.

Click on or scroll down and hit Enter on your keyboard to add additional Details information.

Once a panel exits on the Consumer Detail page you can open existing entries or Add New directly in the panel. For example, to Add (an additional) Care Enrollment, click on Add New in the Care Enrollment panel.

**Contacts** Include multiple types of Contacts, people that are involved and may need to be contacted or notified on behalf of the consumer.

**A. Add Contact:**

- Type: choose from dropdown list
- Name: contact full name
- Relationship: choose from dropdown list (these are defined by ACL)
- Email address: If known
- Primary? If known
- Information Released Authorized? Is there a legal document or has the consumer consented to their information being shared with the contact?
- Location: Address of Contact

- Notes: Regarding the Contact
- Phones: Contacts phone information. May enter more than one type of phone number

**Care Managers** There are multiple TYPES of Care Managers such as; case managers, Flexible Choices Consultants, TBI Providers and others involved in care & service coordination. Only one Care Manager may be Primary at any given time.

- Primary: When a person is enrolled in a DAIL program that includes case management services that case manager or coordinator is to be checked off as **Primary**. If only the case management Agency is known at that point in time the Agency is **Primary**. When a person is not enrolled in a DAIL program then the Agency or Case Manager working with the person is **Primary**. A record can contain multiple Care Managers.
- Care Managers shall be entered with an accurate start date and updated with an accurate end date. **To assist the consumer and coordinate care it is important that the care manager information be kept current.**
- Care Managers are one of the security areas in a consumer record. The Care Manager’s Agency of employment shall be entered as a Care Manager in addition to the actual case manager for security and record access.
- AAA and DAIL SAMS Users should enter & update Care Managers. (i.e. CFC LTCCC adds Care Manager = Chosen Case Management Agency at time of Clinical Certification. When the Case Management Agency assigns a Case Manager the Case Manager should add themselves as the Primary Case Manager.

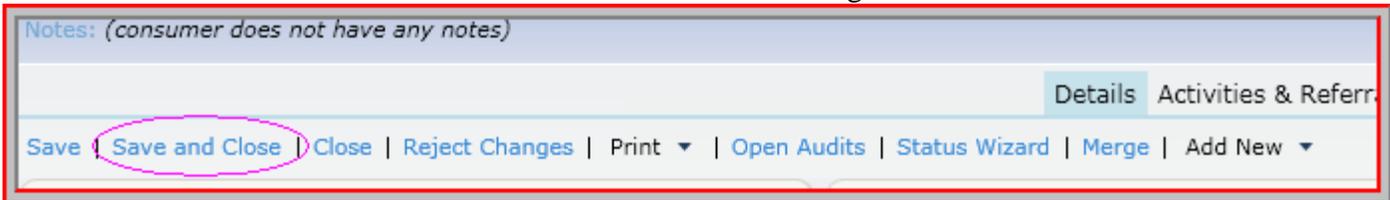
### A. Add Care Manager

- In the Care Manager panel click **Add New**
- Choose the **Care Manager** from the drop down list. You can also type ahead to get closer to the name.
- **Primary?** For CFC records the CFC case manager is primary.
- Correct the **Start Date** as needed.

- Click **OK**

Note: The **Agency Filter** is only a filter. It is not a field that is saved. You may but do not need to use it. If you choose an Agency Filter the list of Care Managers will be limited to only those care managers associated with the Agency.

- Click **Save and Close** when done with record to save changes



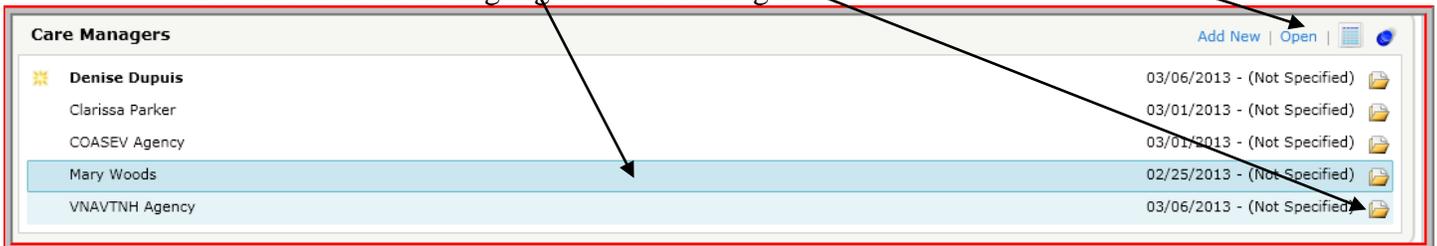
Historically **Care Managers** were not updated with end date. SAMS is a consolidated shared database (AAAs and DAIL). AAAs and DAIL enter Care Managers. DAIL and AAA shall update Care Managers.

### **B. Edit Care Manager**

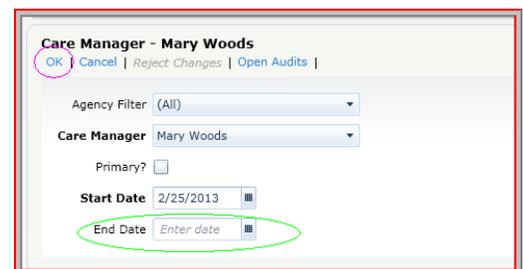
Details screen Care Manager Panel

**Open Care Manager to Edit:** There are several ways to **Open**:

- Highlight (one click) the Care Manager and click Open OR
- Click on Row Icon Action to Open OR
- Double click on the Highlighted Care Manager



- Enter **End Date**
- Click **OK**



The Care Manager view defaults to display **active** Care Managers. When a Care Manager entry has an **End Date** it no longer displays on the Care Manager panel. To view Care Managers that worked with a person in the past click on **Show All**.



**Providers** Historically AAA entered Providers in Details. This is not a requirement but a choice. A reason to add a Provider under Details is to view who a Provider of Services is quickly on the Details page. Since SAMS is a shared consolidated database Providers in Details are **not** to be checked off as Default (**VT Policy**). If a Provider is entered in Details the entering Agency is responsible for **updating** the provider information when the Provider is not longer working with the person.

- Providers may be an individual or organization who provides services as a business (not a caregiver). The Provider must be registered in the database administrator.
- Case Managers should be listed as Care Managers.
- Providers may be recorded in Service Delivery without adding them to the Details page.
- Providers may be recorded on the Consumer Details page. If recorded on the Details page the effective dates must be accurate and updated.
- Providers in Details must not be checked off as default. **VT Policy**
- Case Managers should be in the record as a **Care Manager**.

**Notes** in consumer details are intended for short notes that are important for any everyone accessing the record or that do not fit elsewhere (i.e. assessment or Service Delivery).

Click on other areas of the record to add additional information such as Assessments and Service Delivery.



## Activities & Referrals

Activities and referrals are currently minimally used in VT SAMS. Activities are added to a record to indicate when an action has occurred in the record. Alerts can be used to inform other SAMS users.

Activities may be used as reminders for Care Managers. To use Activities & Referrals in a manner not currently in use, a design and process planning must occur at the SAMS Administrator level. If you wish to use Activities & Referrals in a new way speak to your agency SAMS Administrator or lead.

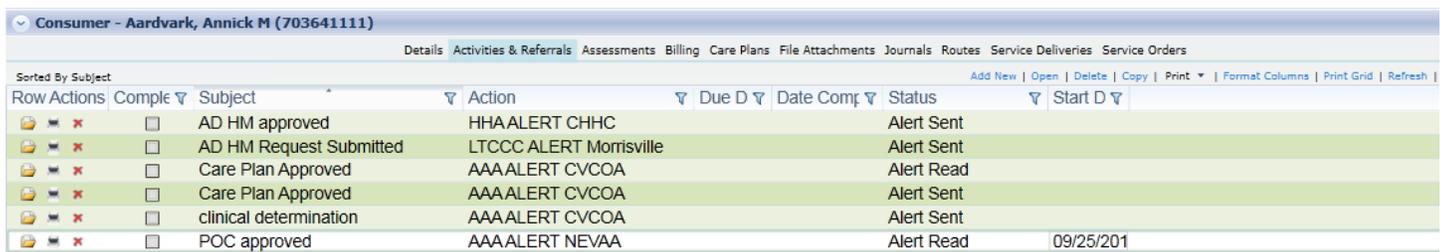
### A. View Activity

In a consumer record:

- Click on Activities & Referrals

Open Activity:

- Double click on Activity, OR
- Click the Open Folder icon in the Row Actions, OR
- Highlight the Activity and Click Open the Grid Actions



Row Actions	Complete	Subject	Action	Due D	Date Comp	Status	Start D
	<input type="checkbox"/>	AD HM approved	HHAALERT CHHC			Alert Sent	
	<input type="checkbox"/>	AD HM Request Submitted	LTCCC ALERT Morrisville			Alert Sent	
	<input type="checkbox"/>	Care Plan Approved	AAAALERT CVCOA			Alert Read	
	<input type="checkbox"/>	Care Plan Approved	AAAALERT CVCOA			Alert Sent	
	<input type="checkbox"/>	clinical determination	AAAALERT CVCOA			Alert Sent	
	<input type="checkbox"/>	POC approved	AAAALERT NEVAA			Alert Read	09/25/201

Once an Activity is Open you can View all the details including Comments that have been entered.



Consumer - Aardvark, Annick M (703641111)

Activity/Referral - AAAALERT CVCOA, Care Plan Approved

Subject: Care Plan Approved  
Action: AAAALERT CVCOA  
Agency: Central Vermont Council On Aging  
Provider: A.A.A. Agency  
Care Program: AAAALERT CVCOA  
Status: Alert Read  
Reason: Alert Read

Status Date: 1/3/2014  
Due Date: Open Date  
Start Date: 9/25/2013  
Start Time: Open Date  
Date Completed: Open Date  
Time Completed: Open Date  
Follow-Up Status: Not Required  
Follow-Up Date: Open Date  
Follow-Up Time: Open Date

Originated By: Vermont Department of Aging and Disabilities  
Creator: Nancy Hannah

Comments: This is where you add a note. LN 09:25:13  
Each note must include the writers name or initials and the date of their entry. If 9:26:13 Otherwise you cannot determine who wrote what note and when.  
Comments on activities is one field that keeps expanding as you add to the field. There is no way to have more than one comment field as they must be distinguished and separated by writer name and date. RN 09:27:13

### B. Add Activity

See program or agency instructions for additional instructions

- Click on Activities and Referrals on the SAMS Navigation Bar, or
- In a Consumer Record click on Activities & Referrals
- Click Add New on Grid Actions
- Fill in fields per program instructions

### C. Update/Edit Activity

See program or agency instructions for additional instructions

Open the activity

- Update status
- Enter status date as today's date (remember you can type "T" for today's date)
- Add Comments as needed
- Click Save and Close

## Assessments

In SAMS “assessments” are forms. The Users Access Role permits and limits which assessments the user can view, create, edit, copy and delete. When adding or copying an assessment the user must enter the correct information to maximize the functions associated with their permissions level.

*Please refer to the Harmony SAMS Guide for additional assessment entry instructions and tips.*

### Important Assessment Information -

SAMS assessments cover a broad range of forms (i.e. VT Full ILA needs assessment, Clinical Certification, Case Notes).

Assessments are to **created in SAMS**. *Note for Omnia Interviewer (OI) Users: OI is only used to Export and Import assessments for completion in the field when an internet connection is not available.*

Assessments are created for specific programs, uses and users.

SAMS includes **Add New** and **Copy** assessment functions.

- **Add New** populates specific fields in the assessment that are linked to the SAMS record. The SAMS record must include information in the linked fields to populate the assessment.
- **Copy** populates the new assessment with information from the copied assessment. The only fields (answers, notes and narrative) copied to the new assessment are completed fields that are for the **exact same** question in both assessments.
- The term “Creating” an assessment in this manual refers to both “Add New” and “Copy” assessment functions in SAMS.

The User must include their Agency and (Assessor) Name when creating an assessment (New or Copy). Including Agency limits which Users can edit the assessment. When you copy an assessment from another agency you Must change the Agency to your agency. If you do not update the Agency to your agency you will get the message “Organization security validation failed. All of the following must be true: Agency is (your agency should be displayed). Update the Agency field to your agency.

Users should only attempt to **Edit or Update** their own assessment. Never change an assessment by another assessor.

In order to maintain historical assessment data, assessments (except certain case notes) should only be updated to add information that was not available at the time of the assessment and was obtained **prior to completing the assessment**. Once an assessment has been completed it shall **not** be changed. **VT Policy**

For Consumer needs assessments such as an Independent Living Assessment (ILA) another assessment must be created to record a change in consumer’s circumstance. (Example: Annual ILA is completed on 1/15/12. The consumer has a change in their functional status on 2/2/12. A new 2/2/12 ILA is created by copy(ing) the 1/15/12 ILA. In SAMS there will be two ILAs. Do not Edit or Update the 1/15/12 assessment.)

### Assessment Notes:

Every question can include a Note. Some assessment questions include Comment space which has limited character space. A post it note symbol to the right of a question indicates that a question includes a Note.

## Assessment History:

When viewing an assessment in SAMS all historical responses to a question from all assessments in the SAMS record that include the same question can be seen by clicking on **Response History** on the assessment toolbar. At the bottom of the screen the Response, Date of Assessment, Last Updated, Last Users and Assessment Form for the question that is being viewed is displayed. You can filter the response history columns.

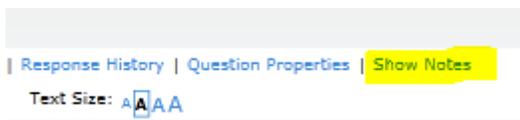
### A. View an Assessment

In a record scroll down the Details Area to Recent Assessments OR click on the area for Assessments From either Recent Assessments or Assessment find the assessment you need to review and:

- Click the Row Action Open Folder icon, OR
- Double click on the assessment, OR
- Right click on the assessment and choose Open, OR
- Click on Open on the actions bar

Notes are attached to a question

- To see assessment note click on Show Notes. You can Show Notes throughout the entire assessment or only when it is indicated that a question has a note.



A question with a note will have a post it note icon next to it.



- If on a question with a note attached when you click on Show Notes the note will appear in the notes box. *Refer to the Harmony SAMS manual for options.*
- To stop seeing the notes box, click on Hide Notes which will have replaced Show Notes.

### Response History

SAMS assessments include Response History. All past responses to the same question in all assessments in the record are displayed at the bottom of the screen.

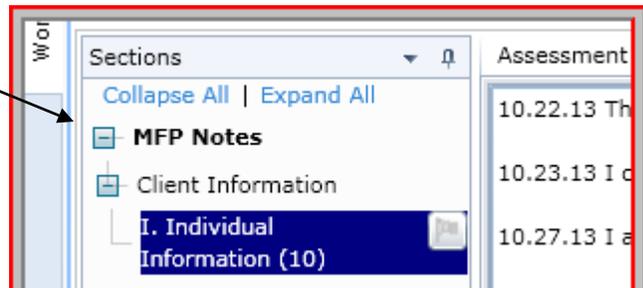
- To see all past answers to a question click on Response History in the assessment action bar
- Click Response History again to turn it off

Response History						
Lock	Response	Date of Assessment	Last Updated	Last User	Assessment Form	
	Partial assistance	04/11/2013	04/11/2013	Randall, Christie	VT DAIL Full ILA 11	
	Partial assistance	01/09/2012	01/09/2012	Marciel, Martha	VT DAIL Full ILA 11	
	Partial assistance	04/11/2013	04/11/2013	Meanrd, Heather	VT DAIL Full ILA 11	
	Partial assistance	05/23/2012	05/23/2012	Bee, Holly	VT DAIL Full ILA 11	

## Navigating in the Assessment –Refer to the Harmony Guide for additional information

Sections on the left allow a user to quickly navigate to a specific section or question in an assessment. This is useful in long assessments.

- Click a + to Expand and – to collapse
- Scroll down the Sections



There are three main tabs to navigate an assessment. Sections, Assessment, Narrative. Click tab to go to that area.



## Viewing Questions & Answers

In SAMS it is extremely important that users are very cautious when viewing assessments. How you navigate to questions\answer may unintentionally change the answer!

### **Not At Risk:**

Navigating assessments using; **arrow** keys, **tab** key and/or the **enter** key will not unintentionally change an answer. Fill in question answers (you type in the answer) are **not** at risk.

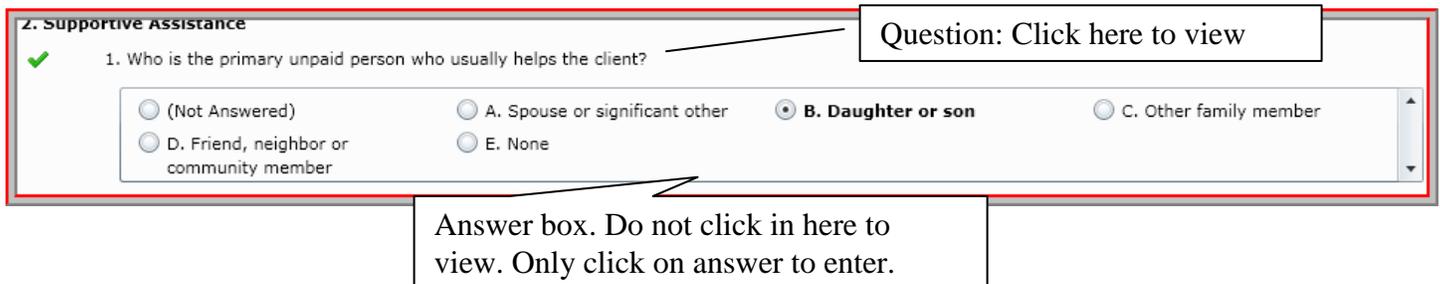
### **At Risk:**

When using a **mouse** to move through an assessment when you click in a choice type questions **answer** that answer will often change. You may even not notice that the answer changed.

### **Mouse Solution:**

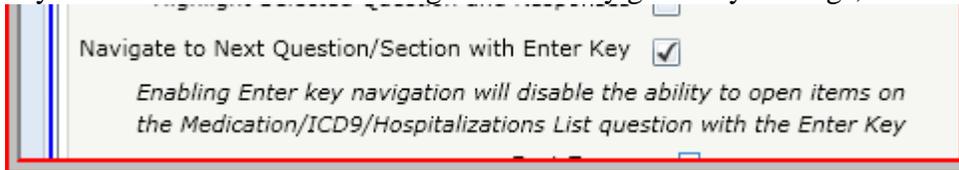
When using a mouse you must **click on the actual question** not in the answer box. Clicking in the answer area will often change the answer.

Each answer field has a box around it. Do not click inside that box to view the answer.



## Recommendations:

- Use your arrow keys or tab key to move through an assessment.
- If you are more comfortable using the Enter key go to My Settings, Assessment Settings and check



- If you need to use a mouse click on the actual Question not in the answer area
- If you are unsure if an answer has been changed look at Response History for that question

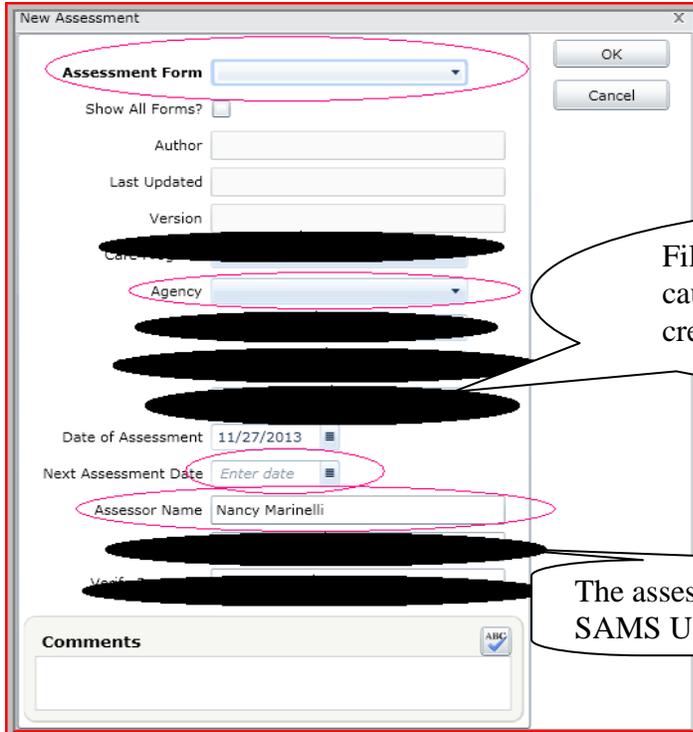
## B. Add a New Assessment

In the Assessment area of the consumer record:

- Click Add New, OR
- Right mouse click in the work area and choose Add New

In the New Assessment pop-up correctly enter **only** the following fields:

- Assessment Form: choose the form from the drop down list
- Agency: choose the agency the user/assessor works for
- Next Assessment Date: Enter or Edit if there is a schedule for when to complete this assessment again
- Assessor Name: Name of the user/assessor (user must be the assessor)
- Click OK



New Assessment

Assessment Form

Show All Forms?

Author

Last Updated

Version

Agency

Date of Assessment 11/27/2013

Next Assessment Date

Assessor Name Nancy Marinelli

Comments

OK

Cancel

Filling in the blacked out fields will cause problems delaying your ability to create, edit and copy assessments!

The assessor must also be the logged in SAMS User for OI Export/Import

SAMS copies specific links fields from the Consumer record to the assessment. Complete the assessment. Click Save and Close

### C. Assessment Copy

SAMS includes a copy function in assessments.

Copy can only be used when a record includes an assessment.

You can only copy from one (1) completed assessment.

You cannot combine two completed assessments.

The only fields copied to the new assessment are those that are the same and are in both assessments.

Copy assessment saves entry time.

The assessor is responsible for reviewing all information in their assessment including information that was copied over from another assessment.

Copy includes an option to include notes and narrative when copying over the assessment data. If notes and narrative are copied they must either be removed from the new assessment or clearly distinguished as being from another assessment (date and initials).

### Copy an Assessment How To

- From the list of assessments in the consumer record highlight the assessment to be copied. Generally this is the most recent assessment.
- Click Copy
- Assessment Form: Choose the form from the drop down list
- Agency: Choose the agency the user/assessor works for
- Next Assessment Date: auto populates to users **default setting**, edit as needed
- Assessor Name: Name of the user/assessor
- Copy Notes and Narrative by **default is checked**. **Uncheck** if you do not want them to copy
- Click OK

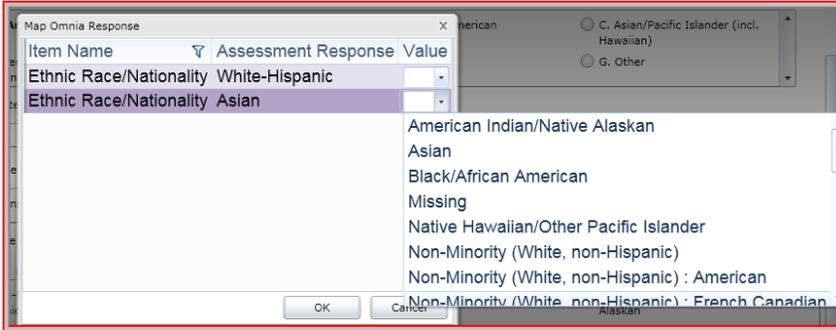
The screenshot shows a 'Copy' dialog box with the following fields and values:

- Assessment Form: VT DAIL CFC AFC ILA 2013.afm
- Show All Forms?:
- Author: Dick Lavery
- Last Updated: 8/30/2013 2:57:12 PM
- Version: 1.0
- Care Program: [Redacted]
- Agency: Department Of Aging And Disabilities
- Provider: [Redacted]
- Subprovider: [Redacted]
- Site: [Redacted]
- Date of Assessment: 11/27/2013
- Next Assessment Date: Enter date
- Assessor Name: Nancy Marinelli
- Password: [Redacted]
- Verify Password: [Redacted]
- Copy notes and narrative:

Buttons: Open, Save & Close, Cancel.

## D. Mapping

There are fields in SAMS that link to specific fields that may be included in some assessment forms. If there are multiple choices you will get a pop-up box to choose which fields should be mapped to SAMS or the Assessment. **If you do not choose an answer the field will be blank. This may affect the AAA NAPIS report.**



## E. Edit Assessment

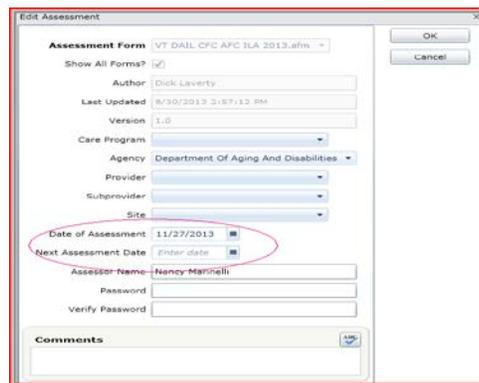
When you Add New or Copy an assessment the assessment date defaults to the date you create the assessment. If you complete the assessment on a later date you edit to change the assessment date

- Open the assessment
- Click on Edit in the assessment action bar



In the Edit Assessment pop-up box

- Edit the Date(s)
- Click OK



## F. Update Assessment

**Only** add or change information in an assessment when:

- You are the original assessor on the assessment
- The assessment has not been submitted or used for eligibility, care plan or services
- The assessment is incomplete
- The additional information has been gathered shortly after the assessment was started.

*NOTE: When an assessor learns of updated information after an assessment has been completed they are to create a new assessment. Use the Copy function, review the assessment and updates are necessary. Do not change the existing assessment since the historical information will be lost.*

## Care Enrollment

### A. View Care Enrollment

- Open Consumer Record
- Details Page - Care Enrollment Panel
- Care Enrollments not in a Terminated status are listed
- To View All Care Enrollments Click on **Show All**
- For additional Care Enrollment details Open the enrollment

### B. Add Care Enrollment

- Click Add New (in the care enrollment panel)
- Enter Level of Care
- Enter Service Program
- Enter Application Date
- Enter Received Date
- Leave Terminated Blank if not Terminated
- Enter Status
- Enter Reason
- Enter Status Date: Date you are entering the information (Todays date)
- Enter Start Date
- Leave End Date Blank
- Save or Save and Close

***HINT: if the Level of Care you need to enter is not showing on the dropdown list update the Application Date to the correct date. Level of Care\Care Program\Service Programs have start dates in the administrative tables. If the application date in the care enrollment is prior to the start of the level of care in the administrative table it will not show on the drop down list.***

### C. Update\Edit Care Enrollment **VT Policy**

When the status of an application or participation in a program changes the Care Enrollment is to be updated in SAMS.

- Open the Care Enrollment
- Update the dates, status and reason as appropriate
- Save or Save and Close

### D. Terminating Care Enrollment **VT Policy**

When a participation in a program ends for any reason the Care Enrollment is updated.

- Enter Termination Date: Date program participation ended
- Status: Terminated
- Reason: Choose from list (many but not all reason start with “Terminated”)
- Status Date : Update to Todays Date
- End Date: Date program participation ended

#### Death or Moved Out of State

- When terminated is due to Death or Moved Out of State (permanent) the SAMS User shall notice if there are other Care Enrollments in an Active status. If there are, the User will contact the appropriate agency to inform them of the change in the consumer's status so they can update their program information in SAMS.
- The User shall change the Record status to Inactive, chose the appropriate reason and enter actual of Death or Move.

#### Case Management after Death

- When a AAA delivers services after a consumer dies, the Care Enrollment End and Termination dates should be the last date of service.
- When Deactivating the Consumer Record, the status date on the Consumer Details Basic Information must be the actual date of death.

## Care Plans

Care Plans are connected to Care Enrollments. Currently only DAIL enters care plans. When a care plan is entered into SAMS that means that the plan has been authorized by DAIL. Providers may use the SAMS care plan information to arrange for, provide and bill for authorized services.

Each Care Plan includes Service Plans. Service plans record the specific service, Agency provider of service, units of service and unit cost authorized by DAIL. SAMS stores multiple care plans with multiple services plans for a consumer. Care plans create a care plan history, showing the DAIL authorized services.

### A. View Care Plan from Consumer List

From the **Consumer List**, Highlight the record, Click on the ▼ next to **Open**, Click on **Care Plans**

Row Actions	Active?	ID	Name	SSN	DOB	Address	Town of Residence	County of Residence	Activities & Referrals	Phone
	<input type="checkbox"/>	1304783267	Aardvark, Abel .	000-00-0000	01/01/1953	23 West Street	Glover	Orleans	Assessments	123-4567
	<input checked="" type="checkbox"/>	105451212	Aardvark, AFC K	121-12-1212	01/05/1945	256 North Street	Morristown	Lamoille	Billing	388-8899
	<input type="checkbox"/>	101191234	Aardvark, Alan A	000-12-1234	01/01/1919	1212 Boxerdoggirl Dr	Eden Mills	Lamoille	Care Plans	555-1212

### **View Care Plan from a Consumer Record**

Scroll down the Details page. Current Care Plans, if any will be listed. From this view you can see the care plan Program and effective Dates, Service type, volume and provider type.

Current Care Plans
LTC Waiver Home based [Active-Eligible : 11/14/2012 - (Not Specified)] (\$33,109.25) 11/14/2013 - 11/13/2014
HB Case Management - AAA- 11/14/2013 - 11/13/2014; 4.00 units monthly; Provided By AAA Agency
PERS - Ongoing: 11/14/2013 - 11/13/2014; 1 unit monthly; Provided By PERS Agency
HB Respite Care - Agency Directed: 11/14/2013 - 11/13/2014; 60.00 units monthly; Provided By Home Health Agency
ISO Employer Support service (HB Waiver): 11/14/2013 - 11/13/2014; 1 unit monthly; Provided By ISO Agency
HB Personal Care - Consumer Directed: 11/14/2013 - 11/13/2014; 35.00 units bi-weekly; Provided By ISO Agency

**Open** the Care Plan for additional details including: service Agency, ICD code, Primary Case Manager, Notes. To open the care plan from Current Care Plans:

- Double Click on the Care Plan OR
- Click Open
- Row Action for Open

### **Go to Care Plans from a Consumer Record**

- Click on Care Plans to see all care plans and/or view service and other care plan details.

Consumer - Aardvark, Liese (327366363)

3/27/1936 Age: 77

Notes: (consumer does not have any notes)

Details Activities & Referrals Assessments Billing **Care Plans** File Attachments Journals

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Status Wizard | Merge | Add New

The record below has one care plan. You can see the program, dates, status, primary care manager etc from the Care Plan list. Format Columns to have the information most important to you listed and arranged so you do not need to scroll for information.

Row Actions	Start Date	End Date	Care Program	Status	Care Manager	Reason	Status Date
[Icons]	11/14/2013	11/13/2014	LTC Waiver Home based [Active-Eligible : 11/14/2012 - (Not Specified)]	Active	Bonnie Hanson	Initial	12/06/2013

Care Plans include **Service Plans**. To view the services plans open the Care Plan by:

- Double clicking the plan, or
- Click on the Open Row Action, or
- Click Open in the Action Bar

**Services and service details**

Service Name	Agency	Start Date	End Date	Planned	Ordered	Delivered
HD Case Management - AAA	A & A Agency	11/14/2013	11/13/2014	52.00 / \$3,602.56	0.00 / \$0.00	0.00 / \$0.00
HB Personal Care - Consumer Directed	ISO Agency	11/14/2013	11/13/2014	3.40	0.00	0.00
ISO Employer Support service (HB Waiver)	ISO Agency	11/14/2013	11/13/2014	60.00 / \$650.00	0.00 / \$0.00	0.00 / \$0.00
PERS - Ongoing	PERS Agency	11/14/2013	11/13/2014	13.00 / \$400.79	0.00 / \$0.00	0.00 / \$0.00
HB Respite Care - Agency Directed	Home Health Agency	11/14/2013	11/13/2014	780.00 / \$17,214.60	0.00 / \$0.00	0.00 / \$0.00

**Diagnosis Codes**

250.01 DIABETES MELLITUS NO...  
Priority: 1 Primary

- Care plan may include multiple services
- Each service should indicate the service agency, Service, units and cost per unit
- Primary Care Manager should be included in a care plan if there is a care coordinator for the plan
- ICD codes are entered into the care plan as they are submitted to DAIL – *for some programs/settings*

## **B. Add Care Plan – First Care Plan**

- Click Add New

In the **Add Care Plan** pop-up enter:

- Primary Care Manager: choose from drop down
- Primary Care Manager Role: choose from drop down
- Care Program: Choose from look-up list
- Start Date: Start of the plan
- End Date: date the plan ends
- Status: Active or Inactive
- Status Date: **Always enter Today's Date (date of data entry)**. *Shortcut type T, then Tab*
- Prior Authorization: Currently not used. Leave blank.
- Click OK

**HINT: Care Plan comments are no longer added in Add Care Plan or Edit Care Plan. Comments are a panel in the Care Plan.**



**Open Dialog icon. Look up.**

This field is only a Filter for the Primary Care Manager List

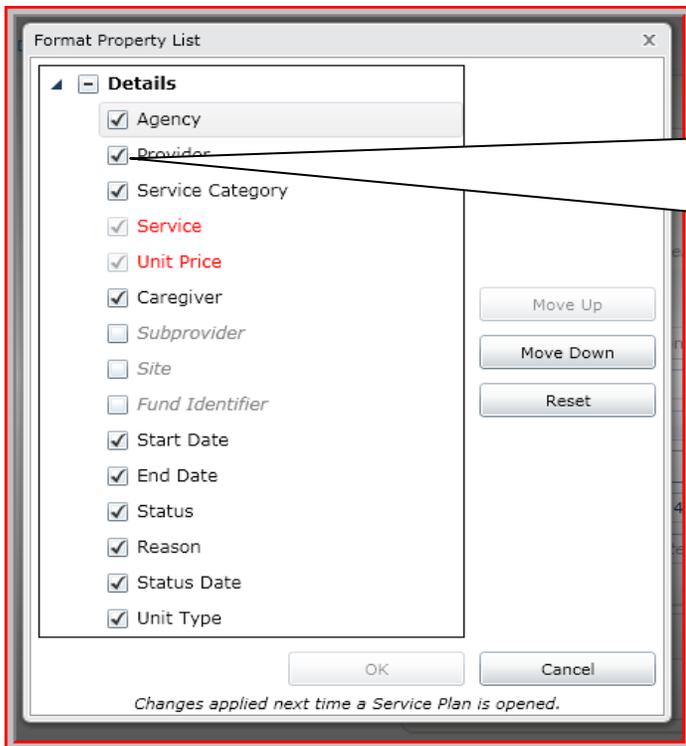
## Service Plans (Services in the Care Plan)

Service Plans are the authorized services in a Care Plan. There may be multiple service plans in a Care Plan.

### 1. Add Service Plan

- Click Add New ▼
- Choose Service Plan
- Add New – right side of Service Plans panel

- **Format the Service Plan Property List to include at least:** *Note: this only needs to be done once.*
  - Agency (Agency Authorized for the Service)
  - Provider (Agency Type or Agency – see program instructions)
  - Service Category (category of service)
  - Service (service)
  - Unit Price (in most services this will auto populate)
  - Unit Type ( auto populates)
  - Start Date (auto populates)
  - End Date (auto populate when a care plan is ended if you check of Adjust Service Plan Dates Automatically)



Check of uncheck box for field  
To be listed.  
Move Up or Move Down to  
Organize the order of the fields to  
minimize the time to enter  
information.  
Red indicates a system required field.

- **Enter Service Plan fields:**

- Agency: type ahead, scroll
- Provider: Often the generic provider type (i.e. AAA agency) for some services the actual provider (i.e. Brookside Nursing Home)
- Service Category
- Service
- Unit Price: Verify or enter: (most services have a unit price associated with them. Services that do not have a set rate must be entered)

## Service Plan Schedule

Enter

- Units Allocated
- Allocation Type
- Frequency
- Click (Schedule) OK

**Special Instructions** -Details of service approval ( as needed)

## **Save Service Plan**

- Click (Service Plan) Ok to Save and Close, OR
- Add Next to add another service

## **Add Care Plan Continued...**

Care Plan Care Manager, Diagnosis Code, Comments, Goals and Journals

If Care Manager was added when you created the Care Plan you do not need to add them now.

If not already added to the Care Plan Add Care Manager

**Care Manager:** enter only one care manager in the care plan

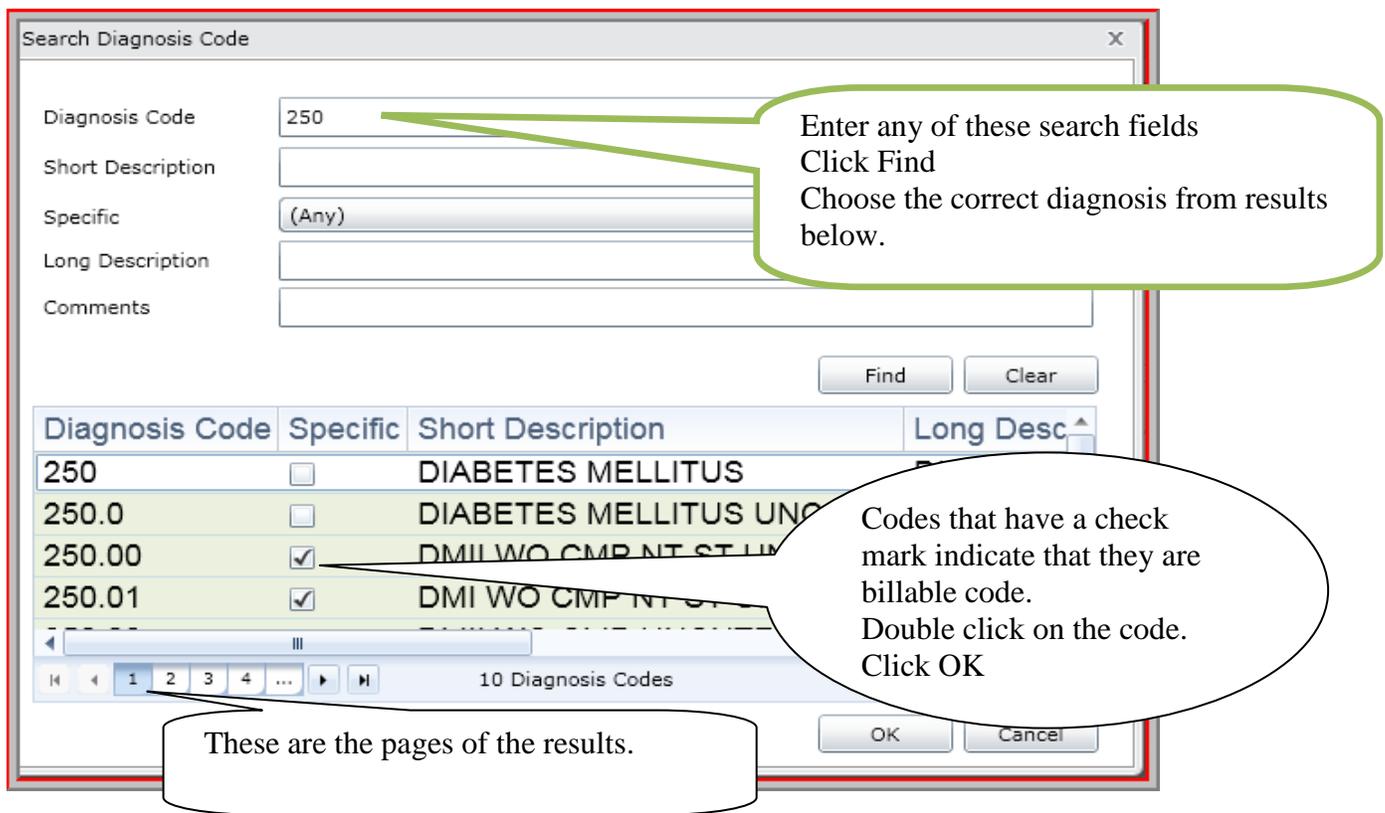
In the Care Manager panel click Add New

- Primary: Check
- Care Manager: Choose from drop down list

- Provider Role: if available chose (i.e. case manager, FC Consultant, TBI Case Manager)
- Click Ok

**Diagnosis Code**

- In the Diagnosis Code panel click Add New OR
- Care Plan Action bar Click Add New ▼
  - Choose Diagnosis Code
- In Diagnosis Code panel
  - Click on the Open Dialog icon for Diagnosis Code Search
    - In Search Diagnosis Code
      - Type in search criteria
      - Click Find
      - Check the correct code in the results
      - Click OK



**Comments (Care Plan)**

- Add comments that are specific to the Care Plan (not a service) here. DAIL uses comments to indicate when a plan was not approved as requested. Remember to add your name\initials and date at the end of the comment. Note: spell check is available for the comment.

**Goals (Care Plan)** Goals specific to the Care Plan

- Click Add New (in Goals panel)
- Goal: choose from drop down list (i.e. TBI Rehab Graduation)

- Target Date: Enter date or choose from calendar
- Achieved: checked when goal is reached
- Actual Date: Date goal was achieved
- Long Term: currently not used
- Comments: add as needed
- Click OK or Add Next to add another goal

### **Journal (Care Plan)**

Care Plan journals are time stamped text entries. Journals are specific to the Care Plan.

### **C. Copy Care Plan – Currently Only DAIL**

From either the Consumer Detail page Current Care Plan or Care Plan list in the record highlight the plan to be copied and Click Copy

**Source Care Plan**(the plan you are copying)

- Start Date: **Do not change**
- End date: Update if necessary
- Status Date: **Always update to Today's date**
- Status: update to Inactive
- Reason: the previous status\_ended

### **New Care Plan**

- Start Date: Defaults to the day after the Source Care Plan ends
- End date: Defaults to what you have in My Settings, Care Plan Settings. You can edit this date.
- Enrollment: Will populate with the enrollment from the copied plan. You can change enrollments, edit enrollments by clicking on the box with the green arrow
- Status Date: **Always Today's date**
- Status: Defaults to Active
- Reason: Choose appropriate reason from drop down list
- Deselect any Care Plan items you do NOT want copied to the new care plan
- Click OK

***HINT: The most recent plan if still in effect has an Active status. A plan with current effective dates will be in an inactive status when a more recent plan has been approved. Only one plan per program is in an Active status at any given time.***

**Copy Care Plan**

**Source Care Plan**

Start Date: 11/14/2013

End Date: 11/13/2014

Status Date: 12/27/2013

Status: Inactive

Reason: initial

**New Care Plan**

Start Date: 11/14/2014

End Date: 5/13/2015

Enrollment: LTC Waiver Home based 11/14/2012 - (Unspecified)

Status Date: 12/27/2013

Status: Active

Reason: Reassessment

Service Plans       Goal Statements  
 Care Managers       Diagnosis Codes  
 Worksheet Entries       Journal Entries

Buttons: OK, Cancel, Select All, Deselect All

Callouts:

- Always enter today's date. The date of data entry.
- End Date will default to what you have in My Settings, Care Plan Settings
- The program of the care plan
- Click for list of enrollments in record. You can edit and add enrollments from here as well.
- Today's Date
- By default all items are checked. Uncheck if you do not want them to copy from source plan to new plan

### D. Edit Care Plan

When a care plan ends due to enrollment ending you must update the Care Enrollment and the Care Plan.

- Open the Active care plan
- Click on Edit Care Plan Details (right hand side)

Consumer - Aardvark, Annick M (703641111)

Aardvark, Annick M - LTC Waiver Home based 1/10/2014 - 1/9/2015

LTC Waiver Home based [ Active ] 01/10/2014 - [ Not Specified ] Care Plan Dates: 01/10/2014 - 01/09/2015

Active as of 01/02/2014

Reason: Initial

Total Cost: \$22,355.05 Average Monthly Cost: \$1,719.42  
 Total Units: 876.00 Average Monthly Units: 67.38

Buttons: Save, Save and Close, Close, Reject Changes, Make a Copy, Print, Open Audits, Calendar, Worksheet, Add New

Buttons: Add New, Open, Delete, Print, Care Managers, Add New, Open, Delete

Button: Edit Care Plan Details (circled)

## Care Plan Details

- End Date: enter plan end date
- Adjust Service Plan Dates Automatically? Check Box
- Status Date: **Always update to Today's date**
- Status: update reason (inactive)
- Reason: update to prior reason\_ended
- Click: Save and Close (on action bar)

Aardvark , Annick M - LTC Waiver Home based 1/10/2014 - 1/9/2015 X

**LTC Waiver Home based** [ Active : 01/10/2014 - (Not Specified) ] **Care Plan Dates: 01/10/2014 - 01/09/2015**  
**Inactive as of 01/10/2014**  
. Reason:  
**initial ended**

Save | Save and Close | Close | Reject Changes | Make a Copy | Print ▾ | Open Audits | Calendar | Worksheet | Add New ▾

### Care Plan Details

Start Date 1/10/2014	End Date 1/9/2015	Adjust service plan dates automatically? <input checked="" type="checkbox"/>
Prior Authorization No. 	Status Date 1/10/2014	Status Inactive
Reason initial ended		

### Service Plans

*Remember to update the Care Enrollment after updating the Care Plan as needed.*

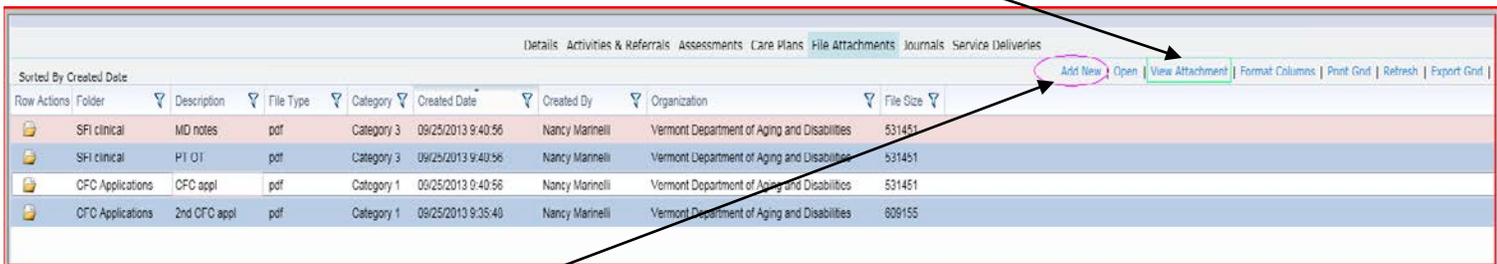
***HINT: If you check Adjust service plan dates automatically you will not need to edit each individual Service Plan's end date. This saves time.***

## File Attachments

Currently only DAIL adds attachments in SAMS. Attachments are categorized by the Folder type and are limited by the file size.

### A. View Attachment

- In the consumer record:
- Click: File Attachments
- Click: View Attachment
- The Attachment will open in a new tab or window
- Click the window X to close the attachment



The screenshot shows the 'File Attachments' tab in the SAMS system. At the top, there are navigation tabs: 'Details', 'Activities & Referrals', 'Assessments', 'Care Plans', 'File Attachments', 'Journals', and 'Service Deliveries'. Below the tabs, there is a toolbar with buttons: 'Add New', 'Open', 'View Attachment', 'Format Columns', 'Print Grid', 'Refresh', and 'Export Grid'. The 'View Attachment' button is highlighted with a green box. Below the toolbar is a table with columns: 'Row Actions', 'Folder', 'Description', 'File Type', 'Category', 'Created Date', 'Created By', 'Organization', and 'File Size'. The table contains four rows of attachment data.

Row Actions	Folder	Description	File Type	Category	Created Date	Created By	Organization	File Size
	SFI clinical	MD notes	pdf	Category 3	09/25/2013 9:40:56	Nancy Marinelli	Vermont Department of Aging and Disabilities	531451
	SFI clinical	PI OI	pdf	Category 3	09/25/2013 9:40:56	Nancy Marinelli	Vermont Department of Aging and Disabilities	531451
	CFC Applications	CFC appl	pdf	Category 1	09/25/2013 9:40:56	Nancy Marinelli	Vermont Department of Aging and Disabilities	531451
	CFC Applications	2nd CFC appl	pdf	Category 1	09/25/2013 9:35:40	Nancy Marinelli	Vermont Department of Aging and Disabilities	606155

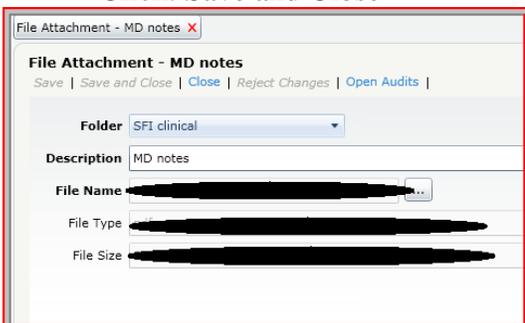
### B. Add Attachment

- Click: Add New
- Folder: choose appropriate folder for the attachment type
- Description: short but descriptive
- File Name: Click box to browse for file. You can add an attachment from anywhere on your computer
- Save: click Save and Close, Save, Add Next
- **Reject:** if you do not want to save the attachment click Close
- In the Close box choose: Discard my changes

### C. Edit Attachment

Only ever edit Folder or Description, not the actual attachment

- Click: Open
- Edit: Folder or Description
- Click: Save and Close



The screenshot shows the 'File Attachment - MD notes' form. At the top, there is a title bar with the text 'File Attachment - MD notes' and a close button. Below the title bar, there is a toolbar with buttons: 'Save', 'Save and Close', 'Close', 'Reject Changes', and 'Open Audits'. The form has several fields: 'Folder' (a dropdown menu with 'SFI clinical' selected), 'Description' (a text input field with 'MD notes'), 'File Name' (a text input field with a file icon and a browse button), 'File Type' (a text input field), and 'File Size' (a text input field). The 'File Name', 'File Type', and 'File Size' fields are redacted with black bars.

## Journals

VT SAMS Users are in the process of defining how Journals should be defined and used in SAMS. Journals are longitudinal consumer notes that are time stamped. Typically, this is a where to track notes about a consumer's progress or document contacts that do not fit into other areas of the consumer record including Assessments, Care Plans and Service Delivery.

## Reports

Accessed from the Navigation Bar, SAMS includes a number of standard Report Templates that are suited to providers of services. From the report templates authorized users develop specific reports utilizing the report filters. Report definitions generate reports based on the report type and filters. SAMS reports produce real-time data from the SAMS database. For detailed information on how to create, run, save and export reports refer to the Harmony **SAMS User Guide** and the Harmony **SAMS – Reports – At-a-Glance Document** located in the Portal [Application Support Resources](#).

### **VT Report Policies: All users must adhere to these policies**

#### **1. Naming Convention:** VT Policy

**Provider Agencies:** Saved Reports are to be named starting with the agency Acronym or Name writing the report (i.e. CVCOA\_Active\_NAPIS).

**DAIL:** Report name begins with the Division name\_program/Purpose\_report consumer group\_ (i.e. ASD CFC Active ERC in St Johnsbury)

#### **2. Report Security** VT Policy

Limit who a report definition is **Shared With** and the **Modifications Allowed** on every report when created. Limiting these fields protects the report filter criteria and reduces the list of saved reports viewed by users.

#### **Shared With: Who do you want to share this report with if anyone?**

- None- No other SAMS user can access the report
- All – Any user regardless their Agency or Provider can access the report
- Agency – Only SAMS Users from the “Agency” in the **Shared with Organization** field can access the report
- Provider – Only SAMS users from the “Provider” in the **Shared with Organization** field can access the report

#### **Modifications Allowed: What sort of changes do you want others to be able to make in your report?**

- None – no changes can be made to the report filters
- All – any and all parts of the report may be changed
- Date Fields Only – only the date fields included in the report filters may be modified

#### **3. Saving Report Definitions** VT Policy

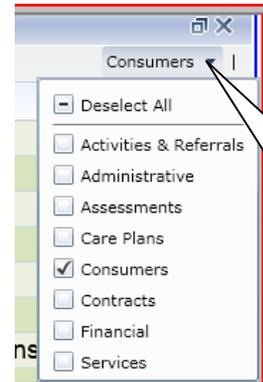
Only save a report definition if the report will be used on-going.

#### **4. Deleting Report Definitions** VT Policy

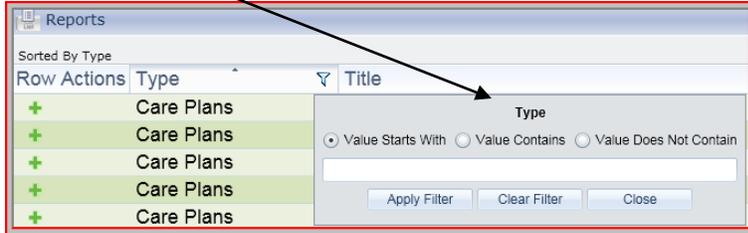
Delete any reports you create that you will not continue to use (if you have delete permissions). SAMS administrators may delete any report definition that has not been used in 14 months.

## A. Run Existing Report

- In the Navigation Bar click Reports
- Locate the Report in the upper screen. These are report templates.
- Filter the Report Type narrow the options.  
Filter using the report type pick list.  
Check the type you need.  
Uncheck any other checked types. OR  
Filter the Type Column or Sort



Click here to get the list. You will only see the report types for your access role.



- Review the Title and Description of reports for the correct report
- Highlight (one click) the Report. *Double click will open the report template for a new report*

Report Definitions for the report will display below. These are saved reports defined with filters for specific information. Filtering or Sorting report definitions saves time by reducing the list of definitions. You need to know key words in the Title, Description, or Comments or who created the report (Create User).

A screenshot of the 'Reports' and 'Report Definitions' sections. The 'Reports' section shows a list of reports with columns for Type, Title, and Description. A callout bubble labeled 'Filters' points to the 'Type' and 'Description' columns. The 'Report Definitions' section shows a list of report definitions with columns for Title, Description, Shared, Create User, Last Update, and Last Updated. A callout bubble labeled 'Open' points to the 'Open' button in the 'Report Definitions' section. A callout bubble labeled 'Sort' points to the 'Sort' button in the 'Report Definitions' section. A callout bubble labeled 'Consumers' points to the 'Consumers' dropdown menu in the top right corner.

- Locate the report
- Double Click to Open or Click Open
- Review the Report Definition for filter criteria and how the results will be displayed

**Report Definition includes:**

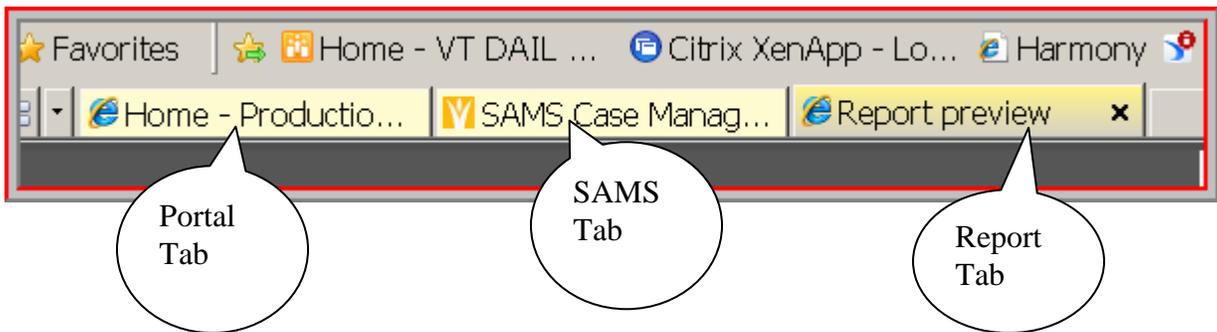
- Title, Description and Comments (a good place to include filter instructions)
- Security on the report for who (agency) can View and modify the report.

**Report Settings:**

- How the results will be displayed
- Report filter criteria

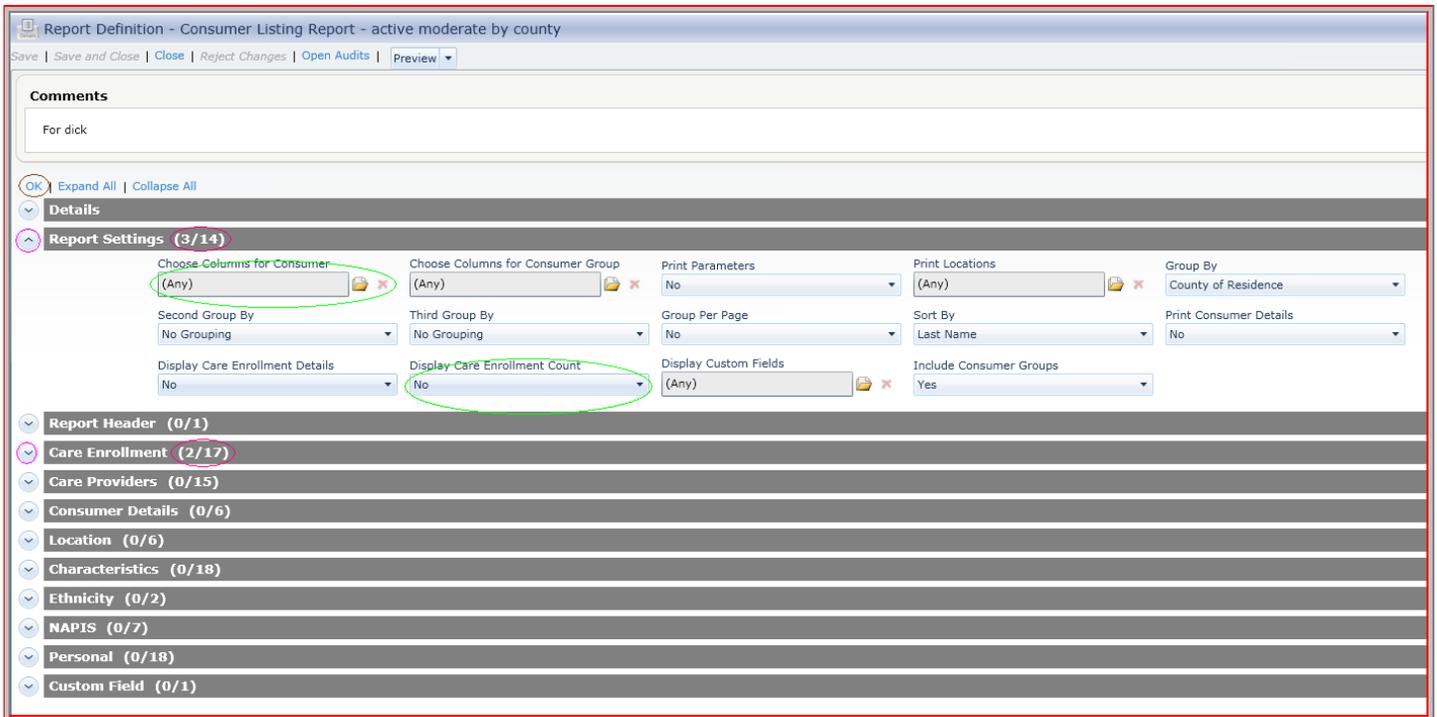
**Run the report (without changing criteria)**

- Click on ▼ next to Preview
- Choose the format for the report results (this runs the report)
- Click on the new browser Tab or Window (determined by your internet settings) for the report results
- Depending on the format you chose you may be prompted to Open or Save
- X browser Tab or Window to close report results



**Change Filter Criteria in a Report Definition**

- Go to the Report Definition
- Click on the Row Action or Open



- Report filters are organized into categories. Expand a category to see the filter options click . To collapse a category click on .
- Current filters per category are indicated in the first number  **Care Enrollment (2/17)**. In this example 2 out of 17 possible Care Enrollment filters are set.
- Add, Remove or Change filters to get the desired information
- Click OK
- Preview ▼ to choose the report format and run the report.
- Saving Changes: changes can be Saved or Rejected before or after running the report. *If you did not create the report or it was not created for you only save changes to filter criteria if the Report creator has agreed to changes being made by others.*

## **B. Build New Report**

- Choose the Report type and click add (+) or double click to Open
- Title the report following the naming convention policy on page 42
- Use Description and or Comments for filter instructions such as date filter that should be changed when the report is run or for further clarification.
- Choose the Security following Report Security policy on page 42
- Choose report filter criteria
- Preview (run) report
- Check report results to determine if the report is returning the desired information
- Edit filters as necessary and rerun
- Save and Close or Close (Discard my changes)

## **Rosters**

**Rosters:** Accessed from the Navigation Bar, Rosters allow the user to record single or multiple service delivery to a group of consumers. To use rosters you first create a Roster Definition and then record service data. Rosters can be continually used to record service deliveries.

**Roster Policy:** All roster definitions Names must start with the agencies name or acronym.

**Routes – Refer to the Harmony SAMS 3 User Guide**

## Service Delivery

Tracks services **delivered** to the consumer by the provider. Services displayed include services recorded as individual deliveries or as part of Rosters.

The AAA enters service delivery for their programs. DAIL enters service delivery only for the OPG and MFP. *Best Practice: these instructions are written for best practice. All agencies show strive to this practice.*

To improve your experience with Service Delivery, the first time you Add New or Open a service delivery **format property list** and put the fields in the best order for your use.

The screenshot shows a 'Service Delivery' form with the following fields and values:

- Care Program: [Dropdown]
- Agency: [Dropdown]
- Provider: [Dropdown]
- Service Category: [Dropdown]
- Service: [Dropdown]
- Service Month/Year: 01/2014
- Topics: (0 Items)
- Units: 1.00
- Unit Price: \$0.00
- Total Cost: \$0.00

Buttons at the top include: Save, Save and Close, Close, Add Next, Make a Copy, Print. A 'Format Property List' link is at the bottom right.

### Recommended order for Non-Caregiver Service:

- Care Program
- Agency
- Provider
- Service Category
- Service
- Service Month/Year
- Topics
- Units
- Unit Price
- Total Cost

### For caregiver/recipient services also include:

- Delivery Type
- Caregiver
- Care Recipient
- Caregiver reciprocal Delivery
- Caregiver Service Delivery

### A. View Service Delivery

Depending on how you format the Service Delivery grid you may not need to open a Service Delivery unless you need to see the details of the Topics.

- In consumer record click: Service Deliveries

To view Service Delivery details **not** on the grid highlight the Service Delivery:

- Double click on service or
- Click Open or
- Click on row action open folder
- Right mouse click: choose Open
- Close when done reviewing service delivery information. Discard Changes if prompted to do so.

Row Actions	Care Program	Provider	Service	Agency	Service Month/Year	Type	Total U	Service Cost
[Icons]	NAPIS - Title III	France O'Brien	Case Management	Champlain Valley Agency on Aging	November, 2013	1 hour	1.25	\$0.00

## **B. Add Service Delivery – Non Caregiver or Care Recipient Services**

*Note: For caregiver/recipient services refer to Harmony User Guide. Both the Caregiver and the Care Recipient must have a Consumer Record in SAMS prior to adding service delivery.*

- Care Program: Choose the Care Enrollment for which the service was provided
- Agency: Agency responsible for arranging for or providing the service
- Provider: Actual provider of the service (choose from drop down)
- Service Category: for delivered service (choose from drop down)
- Service: Delivered service (choose [may auto populate from service category] from drop down)
- Service Month\Year: Enter month/year the service was delivery (*see My Settings: Service Delivery Month options*)
- Topic: Click on the look-up icon
- In Add Topic pop-up
  - Click: Add Topic
  - Check topics delivered on the same date
  - Enter Topic Date
  - Enter Topic Unit (most frequently provided for topics being recorded)
  - Click Add Topics
- If you enter all Topics at once you can edit units/ amounts/dates as needed
- Add outcomes: choose from drop down (used for some service delivery)
- Add Comments: text field (used for some service delivery)
- If more than one topic with units has been entered:
  - Click Sum Top
  - Click Yes Update Topics....?
- Add additional topics until all for that service month have been added
- Units: if entered in topics and summed this will populate to the total units provided for this service. Otherwise enter the total units.
- Click Save and Close

***Hint: To add time to each individual topic code, once you enter the first one you can just hit enter and it takes you to the cell below. Tab and Shift tab will take you to the previous or next field in the same row.***

Details Activities & Referrals Assessments Billing Care Plans File Attachments Journals Routes S

Service Delivery X

Save | Save and Close | Close | Add Next | Make a Copy | Print | Open Audits |

Care Program

Agency

Provider

Service Category

Service

Topics (0 Items)

Service Month/Year 01/2014

Units 1.00

Unit Price \$0.00

Total Cost \$0.00

Place Of Service

Diagnosis Code

Service Order No: Order No : (None)

Specify units by day in the calendar below:

**January, 2014**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
				30	31	

Click here to format the fields and order of fields

Format Properties

### C. Copy Service Delivery

- Highlight the Service Delivery to be copied
- Click Copy
- Enter New Service Period (month/year)
- Click OK
- Topics are NOT copied. Enter Topics
- If not entering time per topic: Update Units
- Click Save and Close

### D. Update Service Delivery

- Open service
- Correct Provider
- Add or Delete a Topic
- Update Topic Date
- Update Topic unit (sum afterwards)
- Update Service Unit
- Save and Close

## Caregiver Care Recipients

Please refer to and read the Harmony [SAMS 3- Family Caregiver Companion Guide](#). The guide is available through the Portal and very informative. Click on the [SAMS 3- Family Caregiver Companion Guide](#) found in the Application Support Resources panel.

- To enter and associate Caregiver and Care Recipient services both the Caregiver and the Care Recipient must have a Consumer Record.

**Dashboard:** Refer to the Harmony User Guide for additional information. Additional information will be added to this section in the future.

- Dashboards are specific to the SAMS User
- Dashboard may include Harmony widgets and Saved Search Widgets
- Harmony preset widget filters include and therefore are limited to the Care Manager
- Saved Searches may be pulled into a widget in the Dashboard

**Saved Searches:** Refer to the Harmony User Guide for additional information. Additional information will be added to this section in the future.

- VT Policy: Saved Searches must use the VT SAMS naming convention and are subject to deletion if not used for more than 18 months.
- Saved Searches should only be saved if the user intends to utilize the saved search on a regular basis.
- Saved Searches are limited to the types: Consumer, Activity, Service Delivery
- Saved Searches may be pulled into a widget on the Dashboard