



Vermont's Guide to Disabilities & Aging Database on SAMS2000™

*A Step by Step Guide for using SAMS2000™
Choices for Care (VT CFC LTC Waiver)*



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Introduction

From the Vermont Department of Disabilities Aging and Independent Living:

NOTE: This manual is intended as a guide on how to use the SAMS software. For questions on policy and procedure, please refer to attached documentation or refer to the Contact Information Chart - CFC Policy Issues section.

What is the SAMS Choices for Care Database?

The SAMS database is a software product from Synergy Software of Essex Junction, Vermont. DAIL/DDAS uses SAMS to manage Choices for Care and some other programs. It is accessible on the Internet through a website called Agingnetwork.com. This website is hosted by Synergy and meets all HIPAA requirements for security.

The CFC database in SAMS includes client demographics, enrollments and approved care plans. SAMS action fields can be used to send client-specific messages to other SAMS users.

The CFC database in SAMS does not currently include client assessment data, although plans are underway to add this data. Similarly, SAMS does not have data on actual service delivery.

Client demographics include:

Name, DOB, SSN, residence and mailing address, other locations, contacts, case manager, marital status, phone, ethnicity and more.

Care enrollment data includes:

Level of care, service program, and enrollment. The level of care possibilities are Highest, High and Moderate. The service programs are Nursing Home (NH), Home and Community-Based services (HCBS), Enhanced Residential Care (ERC), and Flexible Choices. PACE will soon be added as another service program. The possible status of an enrollment is Received, Pending Medicaid Eligibility, Waiting, Active, and Terminated.

Care Plan data includes:

Service program and care plan, start and end date of care plan, status of care plan and status reason of care plan (i.e. active-initial, change, reassessment), services, and units of service. Providers of services in care plan, rates and costs of care plan. Each care plan also has an allocation type: monthly (the number of units is over a month), duration specified (the number of units is a one time occurrence such as PERS installation) and care plan (the number of units over the length of the care plan). Currently we do not have a weekly or biweekly allocation type but that has been requested and will be available in future enhancements.

Assessments:

Assessment data is entered in SAMS through a variety of assessment forms.

1. CFC Clinical Assessment (this is the SAMS name for the Clinical Assessment)
This is a preliminary assessment if there is no ILA already done.
2. CFC Worksheet (this is the SAMS name for the Clinical Eligibility Worksheet)
This calculates preliminary personal care needs for the participant.
3. CFC Services (this is the SAMS name for the Transitional Service Plan)
This calculates preliminary monthly costs for all waiver services.
4. CFC Wait Score (this is the SAMS name for the High Needs Wait List)
This calculates a Waiting score and places the participant in a Waiting Priority.

A participant may have other assessment data completed by other agencies on different forms (such as the full Independent Living Assessment-ILA done by Home Health Agencies or Area Agencies on Aging).

AgingNetwork.com logins and SAMS logins:

In order to get to the SAMS CFC database, two logins are required. The first login is to Agingnetwork.com. The second login is to the SAMS CFC database. Each login requires a user ID and a password.

The organizational login to Agingnetwork.com is managed by Synergy software and requires a hosting subscription service fee. This fee is about \$30/organization per month or about \$360/user per year. Subscriptions must be paid to Synergy for at least one user from each provider organization. Each subscription allows one user from that organization to access SAMS at a time; additional subscriptions allow multiple users to access SAMS simultaneously. Note that Agingnetwork.com logins are generic to an organization, such as CVAAuser1. Users from each organization must use an organizational password when accessing SAMS. This password must be changed periodically.

The login to the SAMS CFC database is managed by DAIL and requires no fee. This login represents a specific person. Each person must log in as her/himself, using a unique password that must be changed periodically.

To streamline the process for adding and terminating users, DAIL will manage the requests for all logins and will instruct Synergy to invoice each provider directly. When a person is no longer authorized by the provider (due to termination, reassignment, etc.) the provider must notify DAIL so that the user can be deactivated from SAMS access.

Requesting AgingNetwork.com Logins & SAMS Logins:

Call or email Tracey Harrington or Dick Lavery at DAIL/DDAS with user name, organization and job title and start date (and end date) for access to SAMS. Please see the chart below for contact information. DAIL/DDAS will contact you by phone with the login information of user IDs and passwords.

Contact Information for Agingnetwork/SAMS Questions & Issues

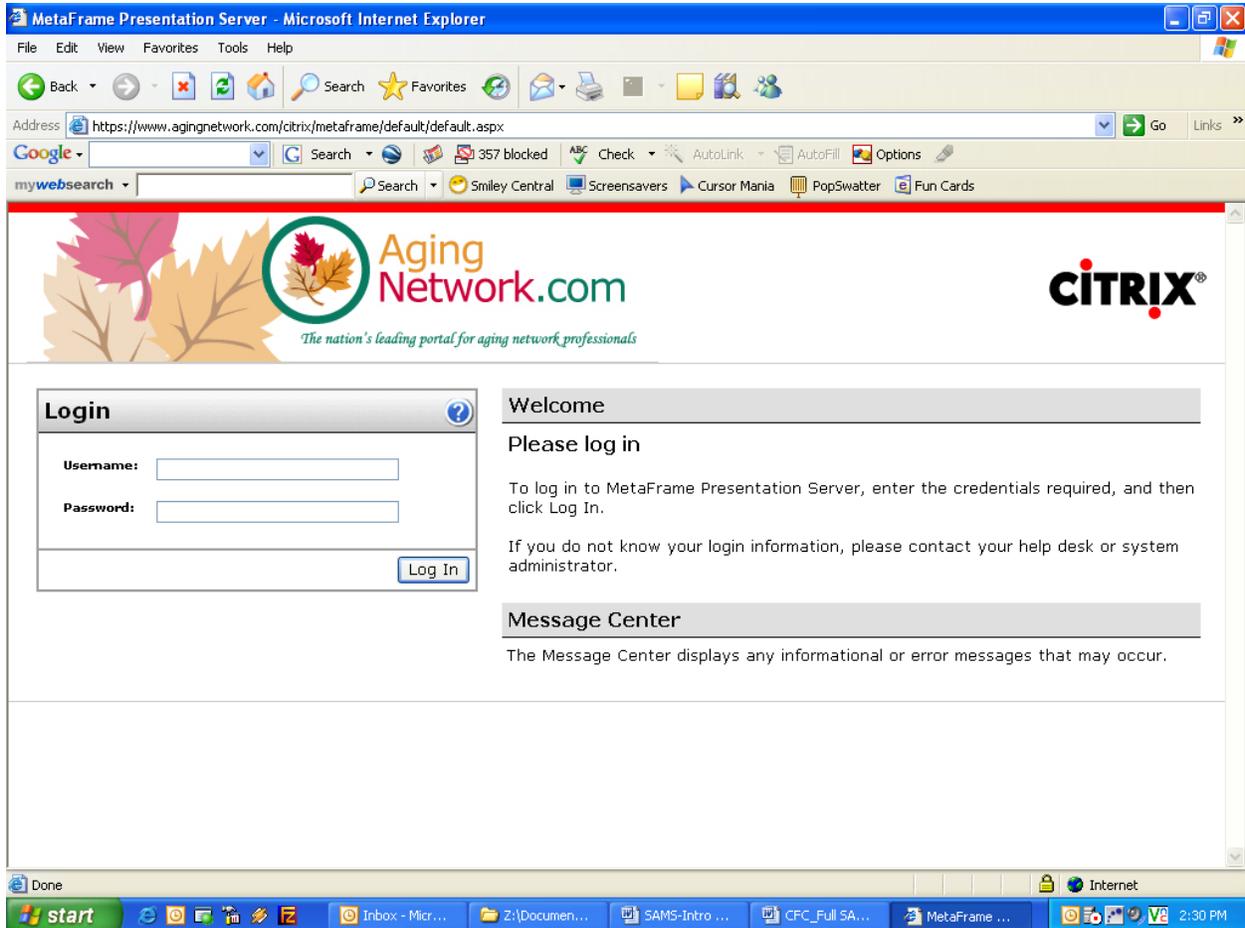
Types of Problems	Contact	Phone	Email	Organization
Initial Login Setup	Tracey Harrington	241-2629	tracey.harrington@ahs.state.vt.us	DAIL/DDAS
	Dick Lavery	241-2425	dick.lavery@ahs.state.vt.us	DAIL/DDAS
Forgetting password	Tracey Harrington	241-2629	tracey.harrington@ahs.state.vt.us	DAIL/DDAS
Adding/deleting users	Tracey Harrington	241-2629	tracey.harrington@ahs.state.vt.us	DAIL/DDAS
How to find data in SAMS	Tracey Harrington	241-2629	tracey.harrington@ahs.state.vt.us	DAIL/DDAS
General SAMS questions	Tracey Harrington	241-2629	tracey.harrington@ahs.state.vt.us	DAIL/DDAS
CFC policy issues	Nancy Marinelli	241-4431	nancy.marinelli@ahs.state.vt.us	DAIL/DDAS
Specific CFC client issues	Local LTCCC			DAIL/DDAS
Agingnetwork.com down	Synergy helpline	800-294-8514	support@synergysw.com	Synergy
SAMS error messages	Synergy helpline	800-294-8514	support@synergysw.com	Synergy

Login Instructions

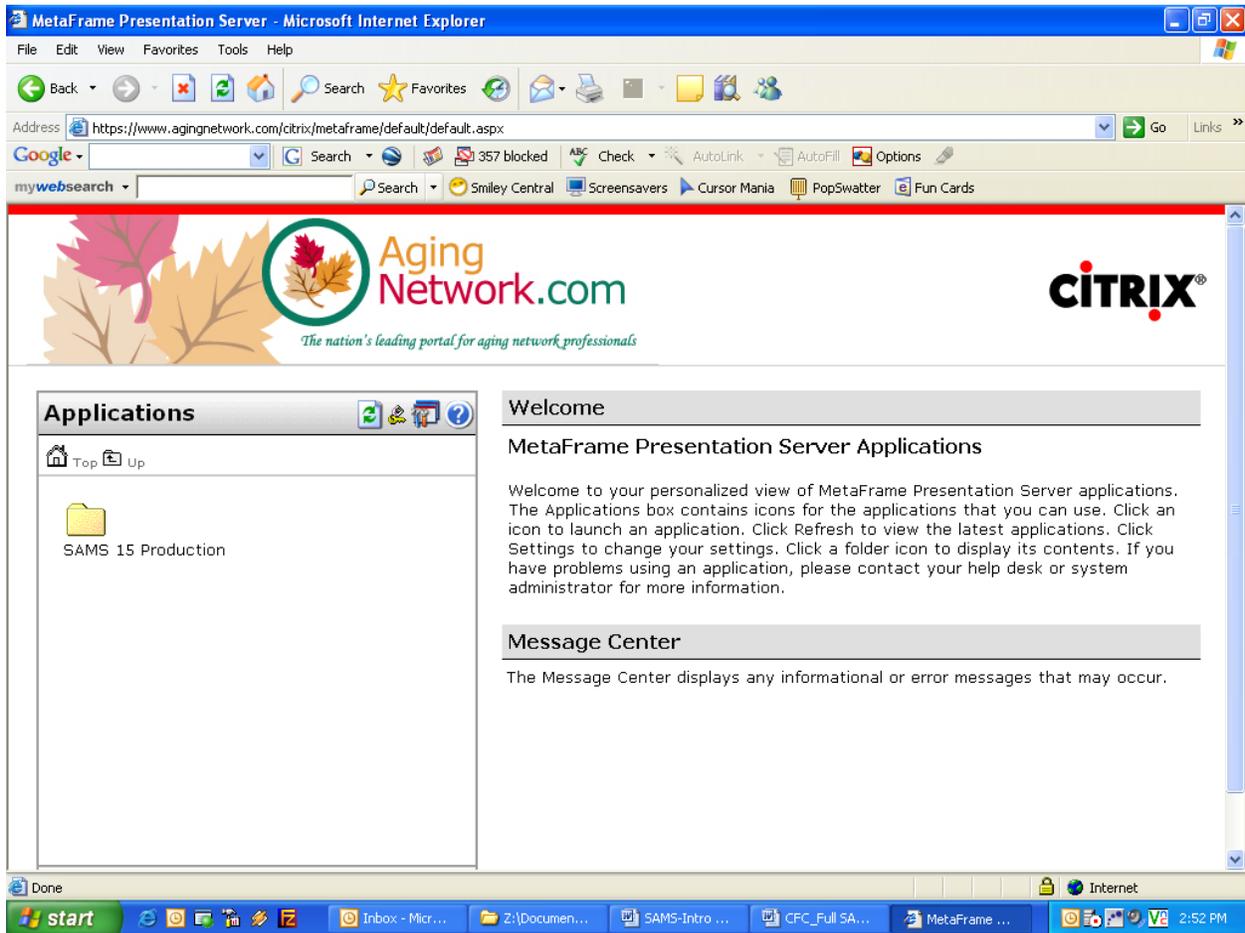
From Internet Explorer, go to the AgingNetwork Web Page at www.agingnetwork.com. Click the link "AgingNetwork.com Login".



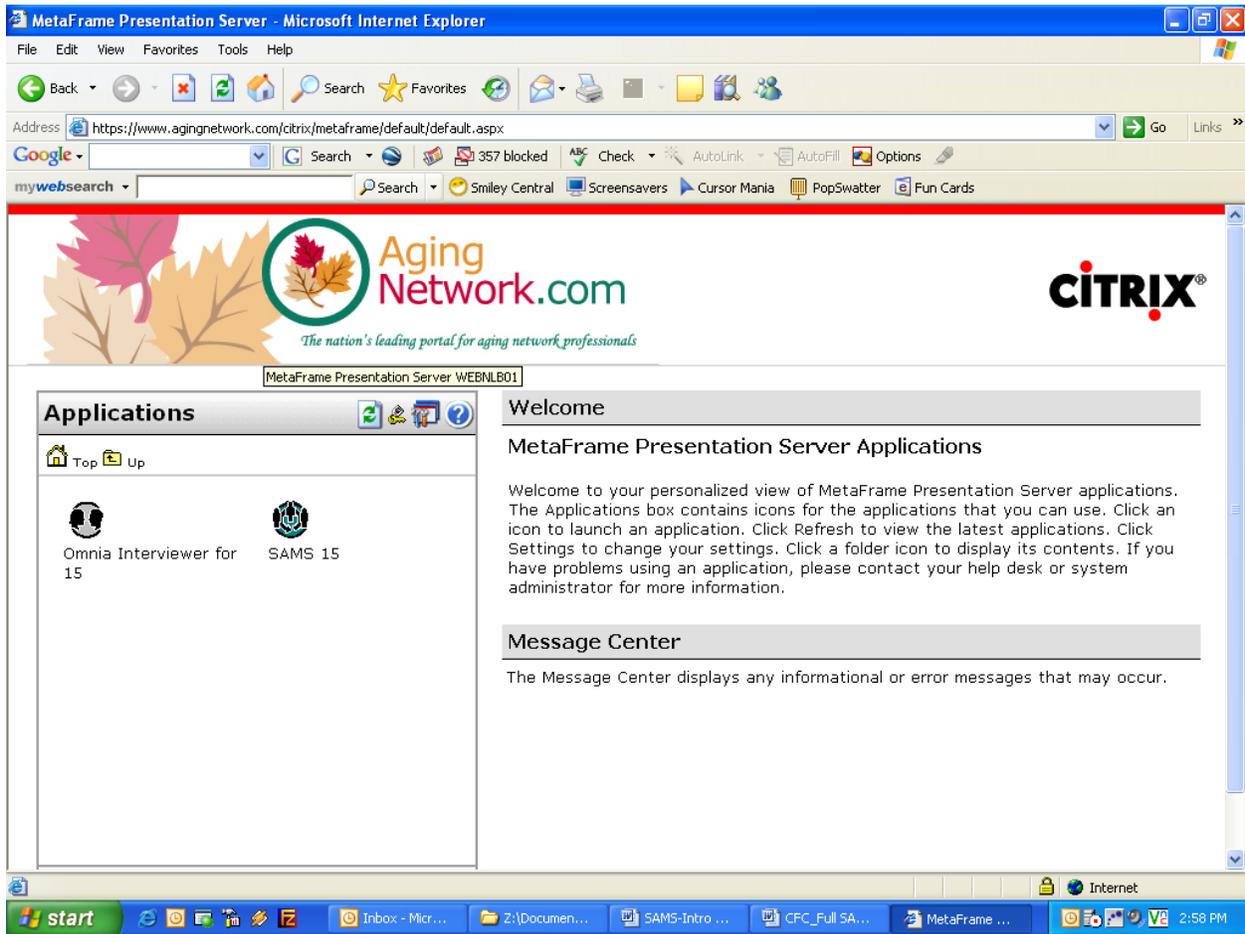
Clicking on the "Agingnetwork.com Login" link will take you to the following screen, which gives access to Agingnetwork. Note that the first time you login, the Citrix Web Client will need to be installed. If you do not have administrative privileges on your computer, please contact your local IT department to have this done. The install is completed by clicking on the installation link in the lower right hand corner of the Agingnetwork.com login screen. Login using the username and password assigned to you by Synergy or by DAIL/DDAS.



Once logged into Agingnetwork, click on the "SAMS Production" folder.



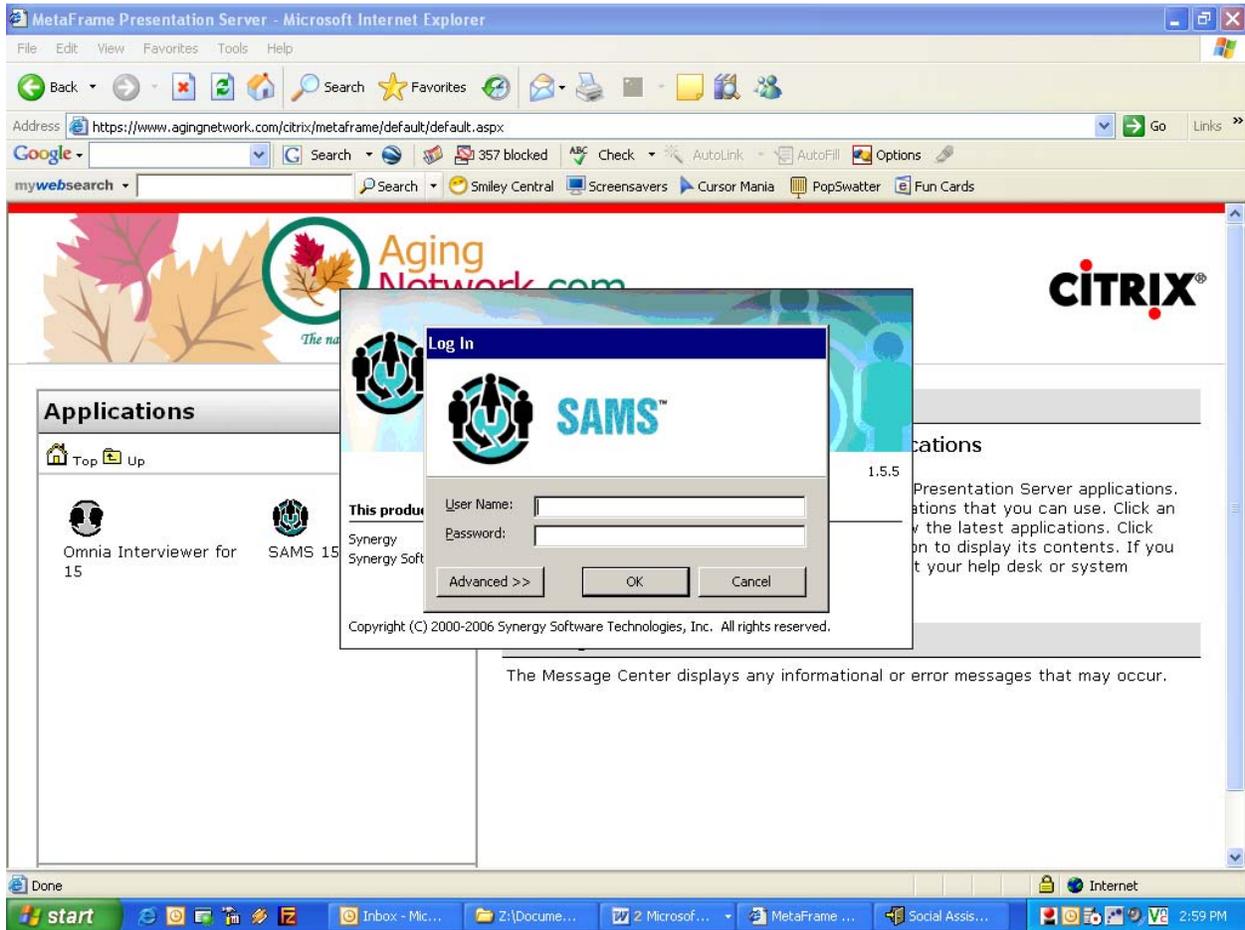
After clicking on the SAMS Production folder, you will see those applications available to you (based on your permissions).



1. Omnia Interviewer	Provides ability to enter/edit and import/export Omnia assessments (For case managers using SAMS for assessments, or for data entry of assessments)
2. SAMS	Provides ability to view clients, plans of care, services, assessments, etc. Also used for reporting. (For all database users)

*This manual will focus on SAMS users.

Login to SAMS by clicking on the SAMS icon, as viewed below. You must login using the username and password assigned to you by DAIL/DDAS.



1. Adding/Modifying Individual Consumers

Opening Consumer list

After you login, the first page you will see is the Consumer list. You should see a list of consumers, as shown below. If you don't see any individual consumers, click on the "Consumers" button in the upper left corner.

(The consumer list below shows test data only.)

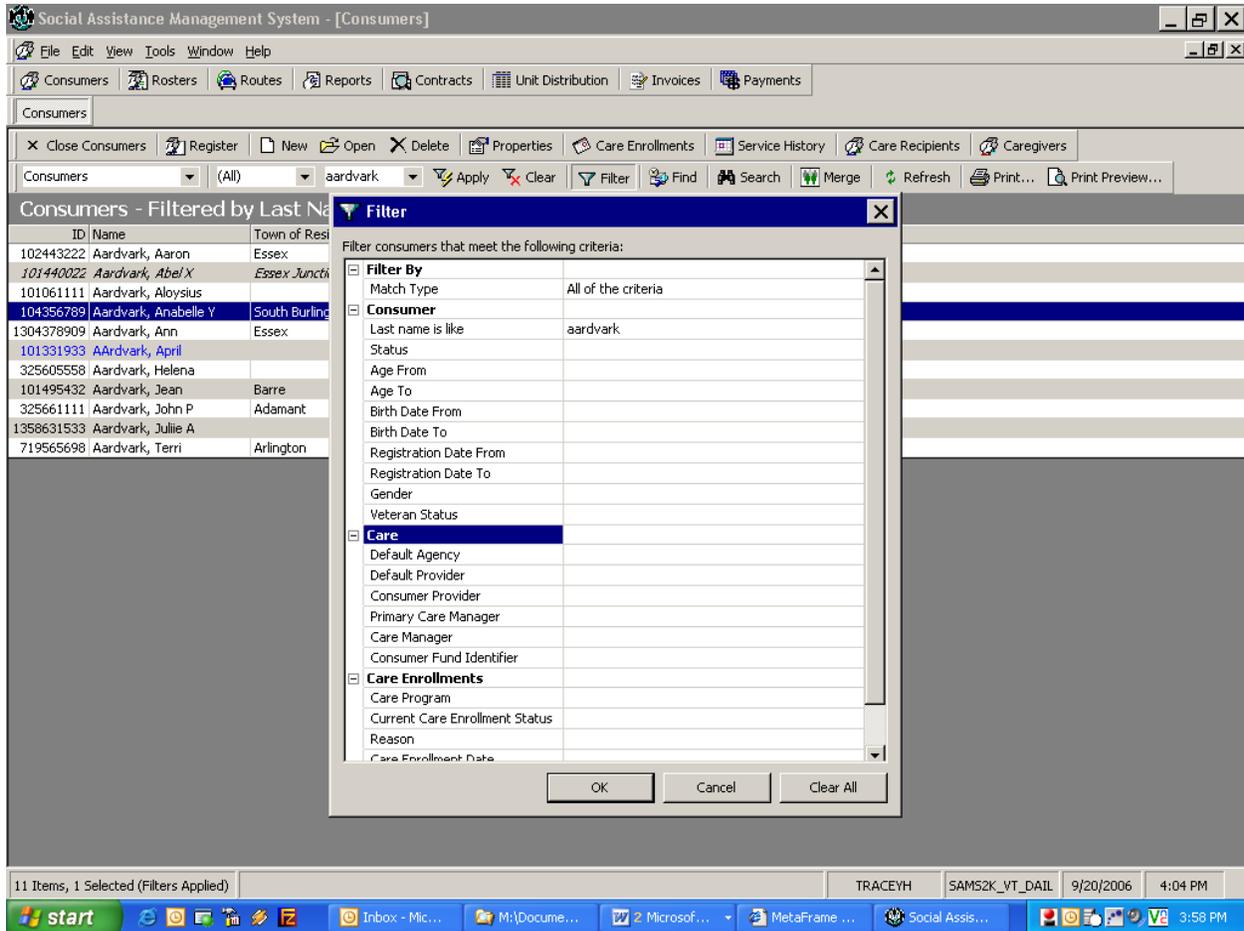
Consumers - Filtered by Last Name "aardvark"

ID	Name	Town of Residence	Agency	Default Provider	Primary Care Manager
102443222	Aardvark, Aaron	Essex	Attendant Services Pro...		June Cantoni
101440022	Aardvark, Abel X	Essex Junction			Toni m Morgan
101061111	Aardvark, Aloysius		Lanolle Home Health A...		Aardvark VCIC match e Test
104356789	Aardvark, Anabelle Y	South Burlington			Kara Artus
1304378909	Aardvark, Ann	Essex			Holly Blair
101331933	Aardvark, April				
325605558	Aardvark, Helena				Aardvark VCIC match e Test
101495432	Aardvark, Jean	Barre		Adlel R Eichel	
325661111	Aardvark, John P	Adamant			Aardvark VCIC match e Test
1358631533	Aardvark, Julie A				Julie m Bigelow
719565698	Aardvark, Terri	Arlington	Attendant Services Pro...		

Filtering Consumer List

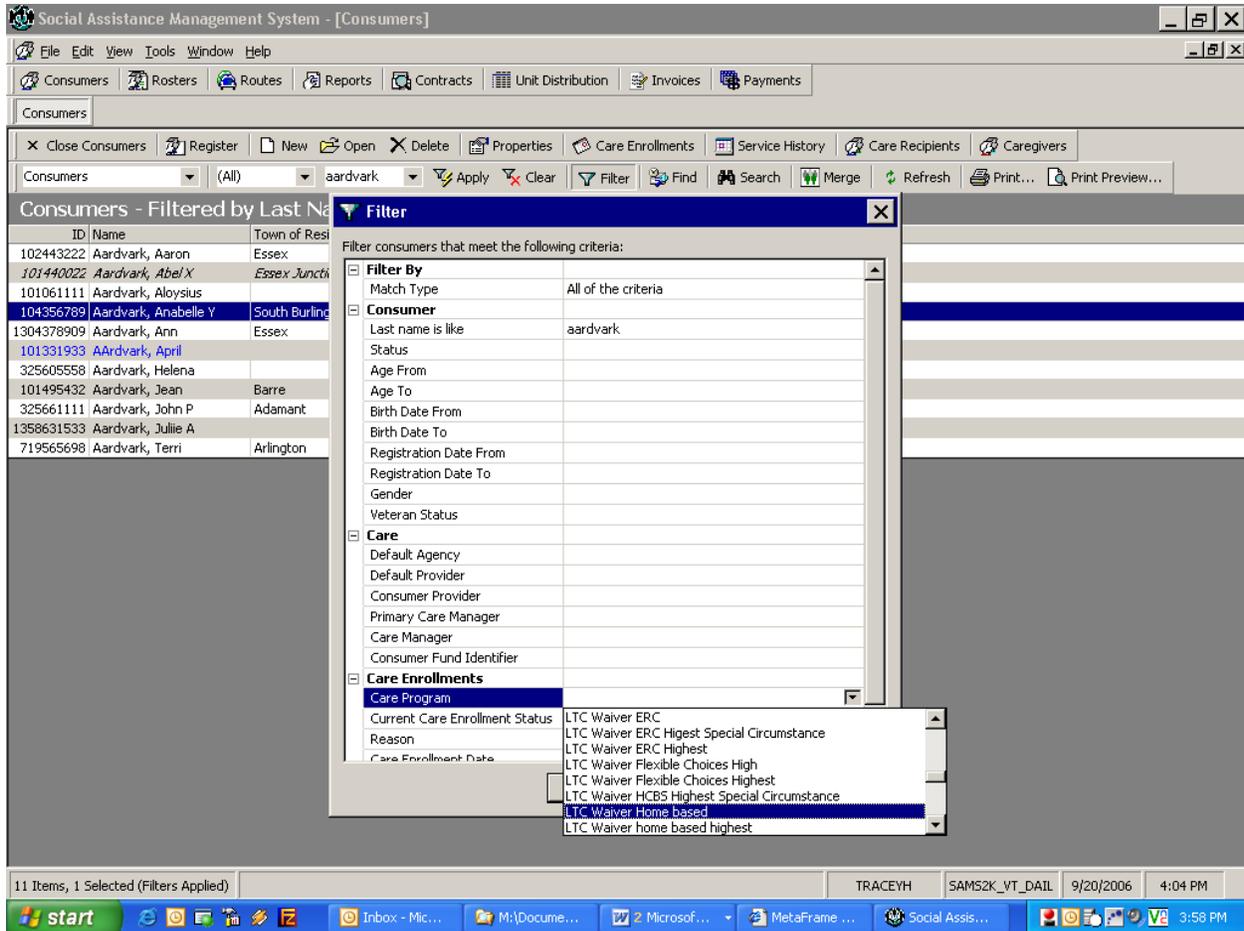
You can select which consumers appear on your list by filtering. Click on the “Filter” button (with a picture of a funnel) in the center of the toolbar and you will see the ‘Filter’ dialogue box below.

Note that the first field, “Match Type” says “All of the criteria”. If this is chosen, all of the selected criteria must be met for the consumers to appear in the filtered list. If “At least one of the criteria” is chosen, the consumer must meet at least one of the selected criteria to appear in the filtered list. This is useful for filtering in situations to see consumers who are residing in a certain county or a certain town. The last option is “None of the criteria”. If this Match Type is chosen, the resulting filtered list will not include consumers who meet the criteria chosen in the filtering process.



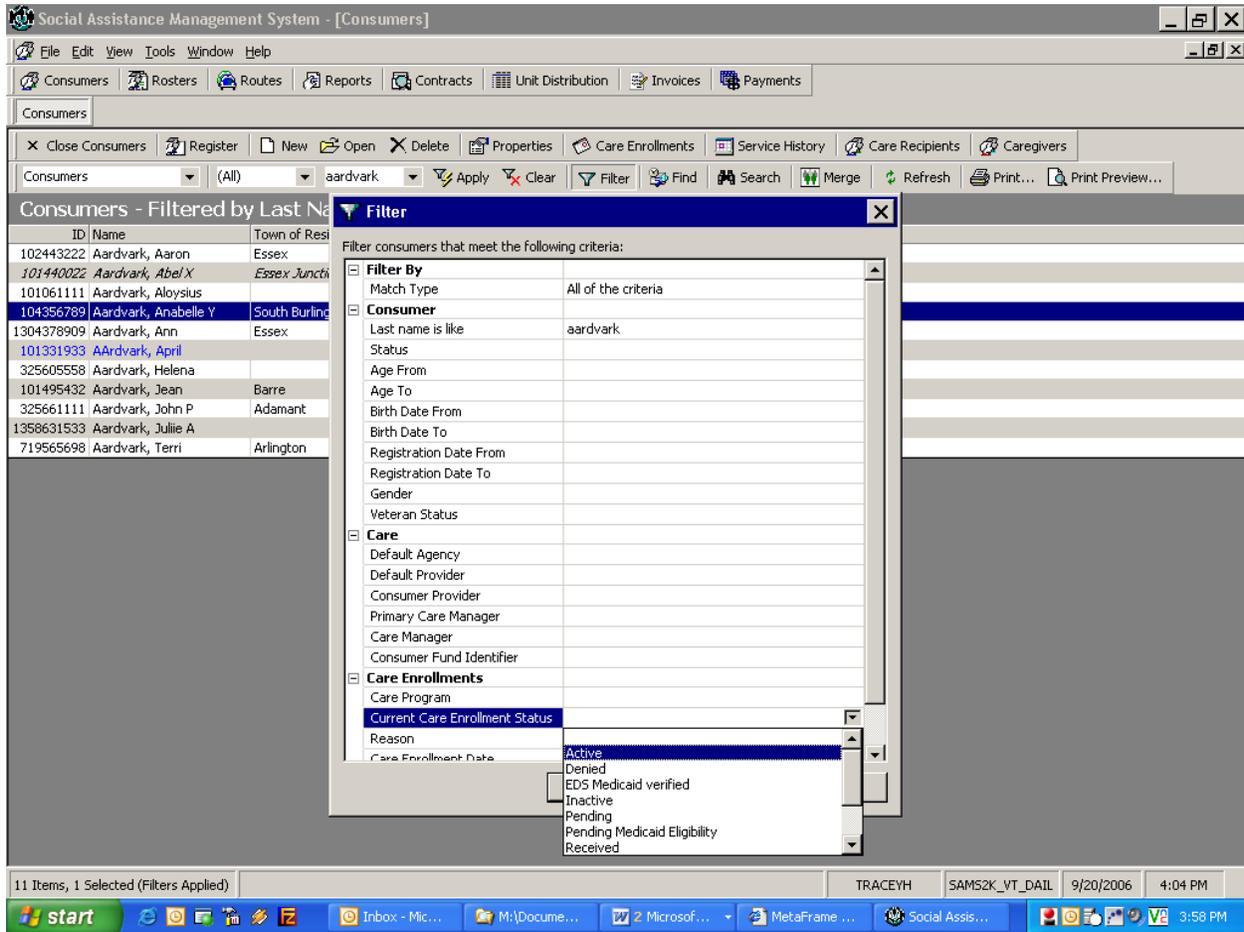
Filtering (by care program)

By clicking on the row to the right of “Care Program”, you can select only those consumers who are associated with a specific program (such as LTC Waiver ERC, LTC Waiver home based, or LTC Waiver Nursing Home).



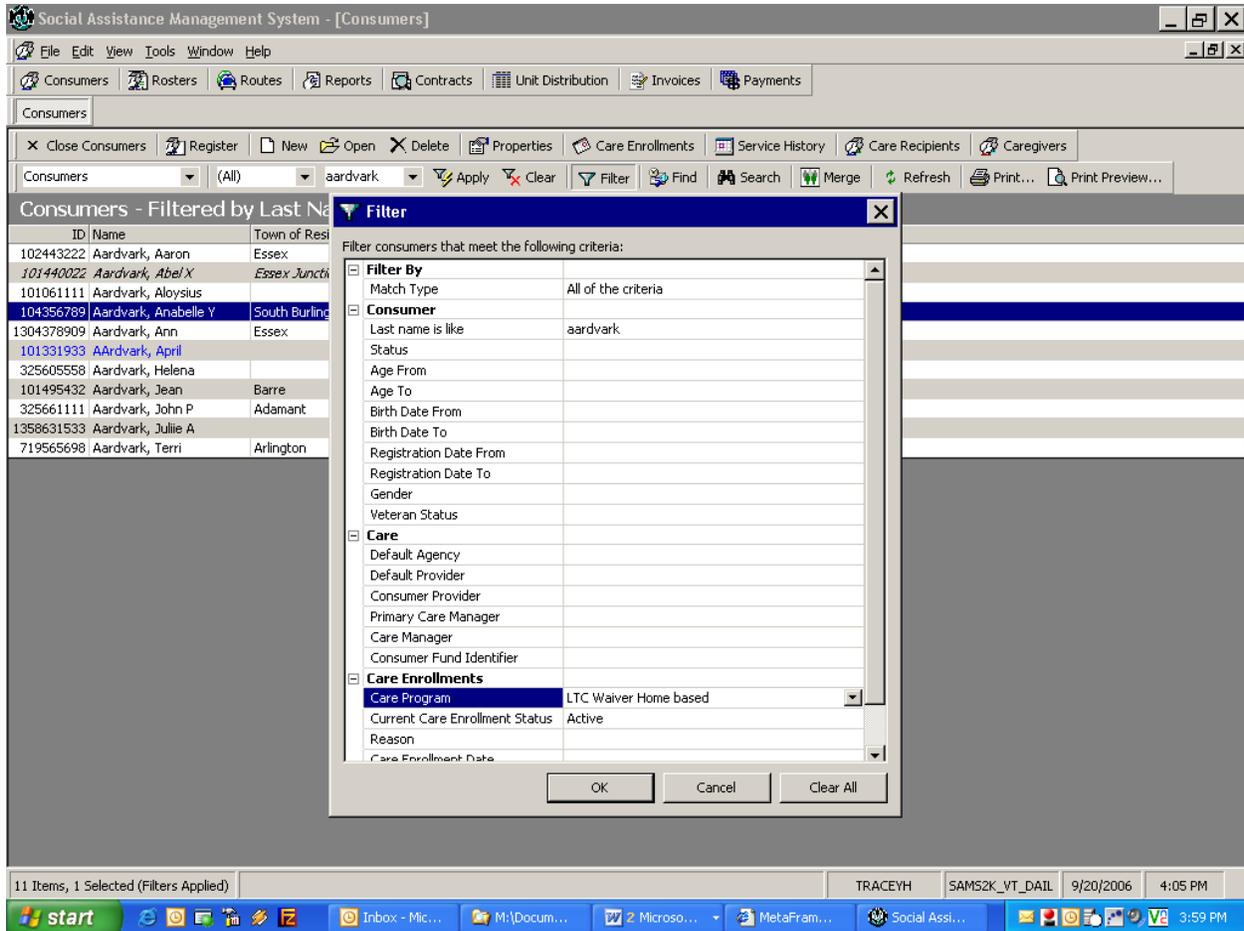
Filtering (by status)

You can also select only those consumers who are in a specific status (e.g. "Active") by clicking on the row to the right of current care program status.



Filtering (care program and status)

In the example below, the filter is set to select only those consumers who are associated with one program (LTC Waiver home based) and one status (Active). After you have chosen your desired filter criteria, click "OK" at the bottom of the Filter dialogue box.



Filtering (filtered consumer list)

When this filter is applied, only those consumers who meet all the criteria will be shown. The example below shows the subset of consumers who are associated with LTC Waiver home based and are Active.

(The filtered consumer list below shows test data only.)

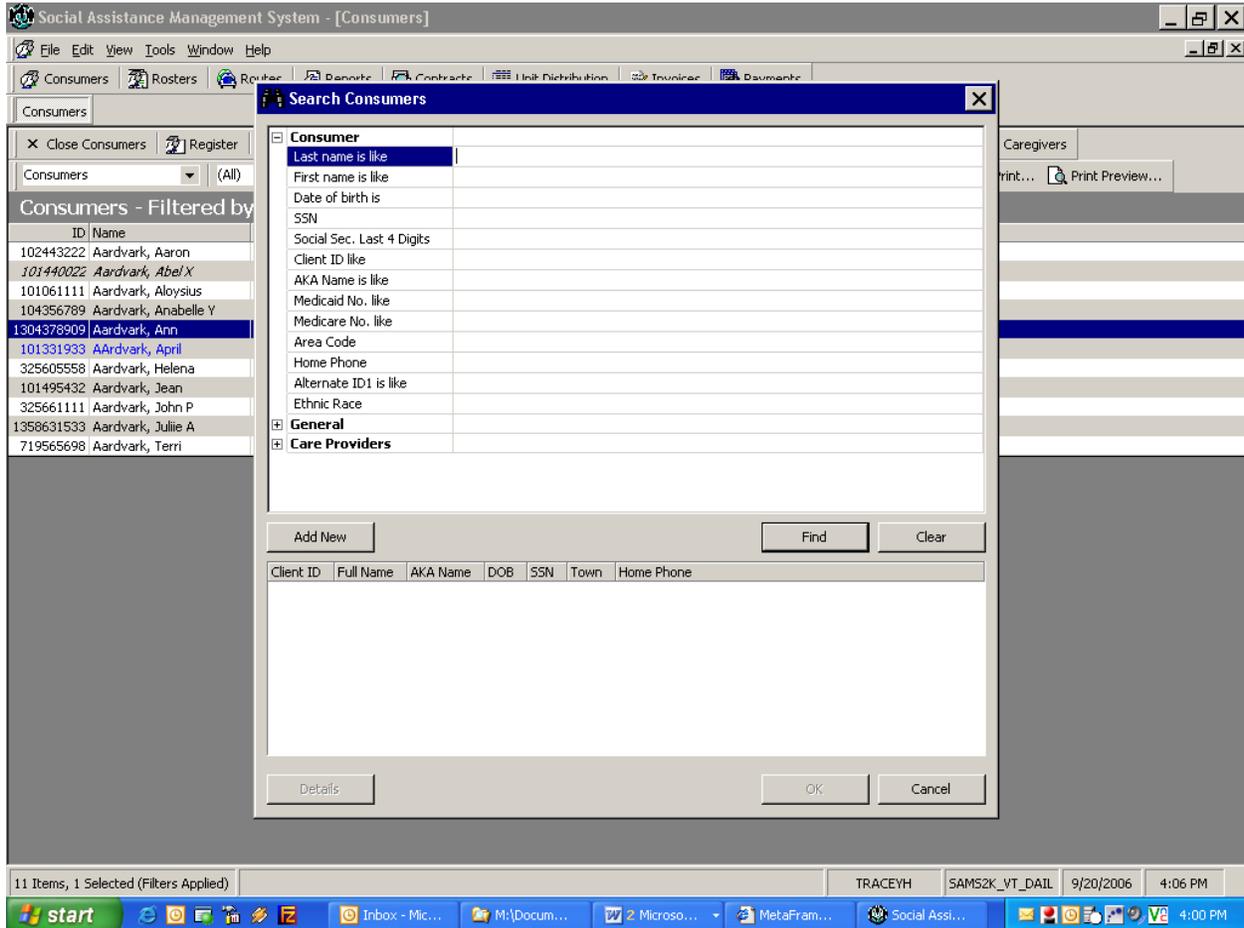
Consumers - Filtered by 3 conditions

ID	Name	Town of Residence	Agency	Default Provider	Primary Care Manager
1304378909	Aardvark, Ann	Essex			Holly Blair

Search for a consumer

The search feature will find all consumers in the database who meet your specified search criteria. Click on the 'Search' button (the picture of a pair of binoculars) near the middle of the toolbar, and you will see the 'Search Consumers' dialogue box below.

(The consumer list below shows test data only.)

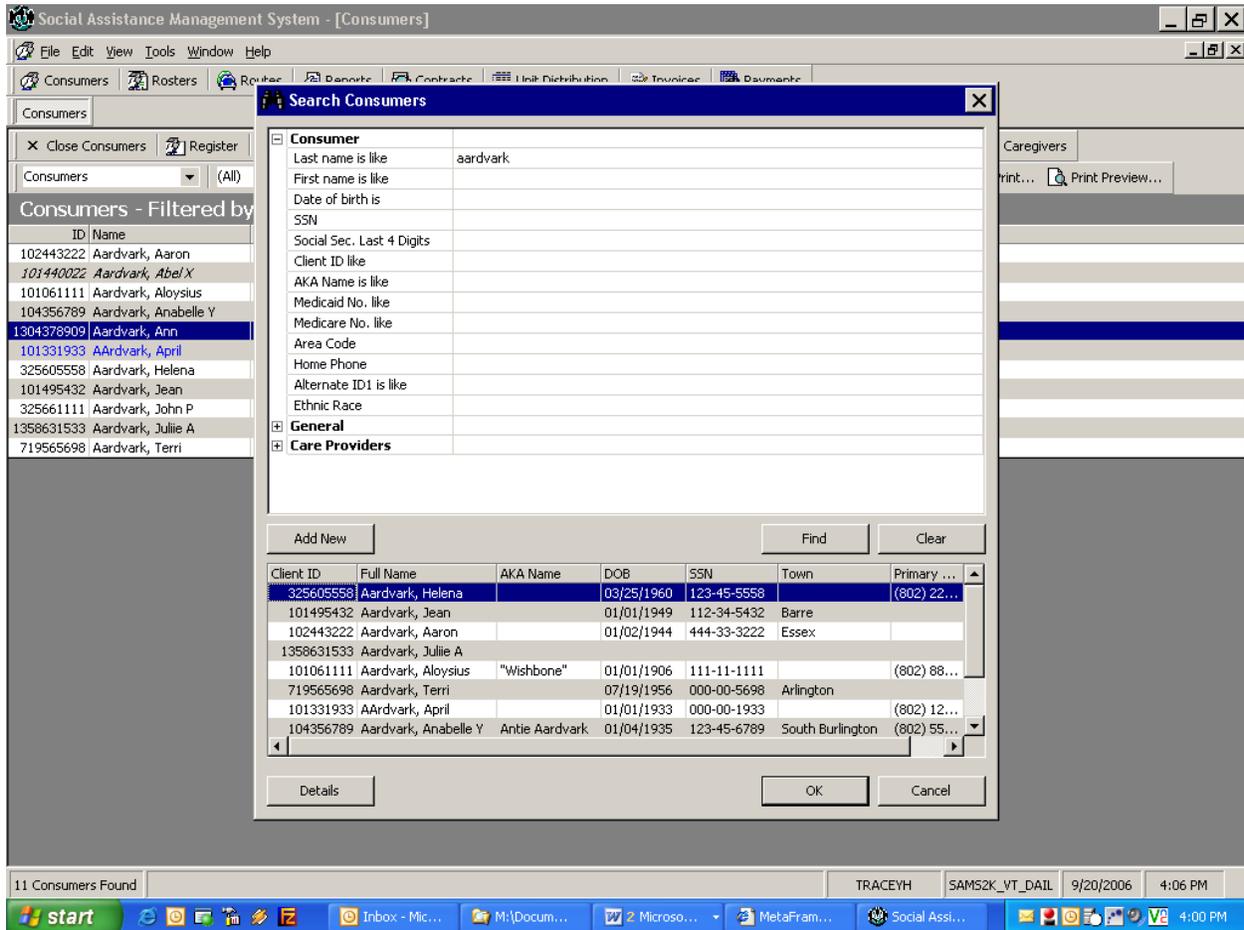


Search (by consumer name)

You can search on any of the criteria in the dialogue box.

If you find a consumer with the wrong Social Security Number contact the LTCCC for that specific district to determine the correct SSN.

As shown below, the search feature can be used by typing the last name of "aardvark", and then clicking the "FIND" button near the middle of the dialogue box.



Search results

This search found many people with the last name of Aardvark. You can select the person that you are looking for by double clicking on the person's name- this will open the consumer record.

If no one on the list meets your criteria, contact the LTCCC for that specific district to determine why you cannot find the desired consumer.

Add a new Consumer

Click on the New button you will open a new client record.

The screenshot shows the Social Assistance Management System (SAMS) interface. The title bar reads "Social Assistance Management System - [Consumers]". The menu bar includes File, Edit, View, Tools, Window, and Help. The toolbar contains icons for Consumers, Activities & Referrals, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, and Payments. Below the toolbar, there are buttons for "Close Consumers", "Register", "New", "Open", "Delete", "Properties", "Care Enrollments", "Assessments", "LIS Application", "SAMSApp", and "Service History". A search bar shows "Aardvark" with a "New" button next to it. The main area displays a table of consumers filtered by last name "Aardvark", sorted by name. The table has columns for ID, Name, Date Registered, Town of Residence, County of Residence, Home Phone, and Status Date. The first row is highlighted in blue.

ID	Name	Date Regi...	Town of Residence	County of Residence	Home Phone	Ac...	Ca...	Status Date	Primary Care Manager
102443222	Aardvark Sr, Aaron	07/22/2004	Georgia	Franklin	(802) 878-8514	<input type="checkbox"/>	<input checked="" type="checkbox"/>		HASS Coordinator
101440022	Aardvark, Abel X	01/01/2004	Essex Junction	Chittenden	(802) 123-4567	<input type="checkbox"/>	<input checked="" type="checkbox"/>	05/01/2006	Toni m Morgan
101061111	Aardvark, Aloysius	04/21/2006			(802) 888-8888	<input type="checkbox"/>	<input type="checkbox"/>	02/07/2007	PACE case manager
104356785	Aardvark, Anabelle Y	08/01/2005	South Burlington	Chittenden	(802) 555-5555	<input type="checkbox"/>	<input type="checkbox"/>	09/13/2005	Kara Artus
201460033	Aardvark, Ann	04/21/2006	Essex	Chittenden	(802) 878-8514	<input type="checkbox"/>	<input type="checkbox"/>		Holly Blair
1336526125	Aardvark, Anne	01/30/2007				<input type="checkbox"/>	<input type="checkbox"/>	01/30/2007	
101331933	Aardvark, April	08/25/2006	Burlington	Chittenden	(802) 123-4567	<input type="checkbox"/>	<input checked="" type="checkbox"/>	09/27/2007	
101485567	Aardvark, Brenda	01/01/2007				<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/14/2008	
101485563	Aardvark, Celine	01/01/2007				<input type="checkbox"/>	<input type="checkbox"/>	01/14/2008	
101905555	Aardvark, Charity M	10/14/2005				<input type="checkbox"/>	<input type="checkbox"/>		
1366028994	Aardvark, Clark	07/23/2007				<input type="checkbox"/>	<input type="checkbox"/>	07/23/2007	
101486666	Aardvark, George	01/01/2007				<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/14/2008	
325605558	Aardvark, Helena	04/21/2006			(802) 222-5555	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Aardvark VCIC match e Test
213260001	Aardvark, Hilary R	02/02/2007	St Albans Town	Franklin	(802) 802-1111	<input type="checkbox"/>	<input type="checkbox"/>	02/02/2007	Christina m Shaw
101495432	Aardvark, Jean	07/01/2006	Barre	Washington		<input type="checkbox"/>	<input type="checkbox"/>		CVCOA Agency
101485565	Aardvark, Jennifer	01/01/2007				<input type="checkbox"/>	<input type="checkbox"/>	01/14/2008	
101485553	Aardvark, Jessica	01/01/2007				<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/14/2008	
325661111	Aardvark, John P	04/21/2006	Adamant	Washington		<input type="checkbox"/>	<input type="checkbox"/>		Aardvark VCIC match e Test
101485568	Aardvark, Julie B	01/01/2007				<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/14/2008	
1358631533	Aardvark, Julie A	04/21/2006				<input type="checkbox"/>	<input type="checkbox"/>		Julie m Bigelow
1212126666	Aardvark, Lazerus	06/25/2007				<input type="checkbox"/>	<input type="checkbox"/>	06/25/2007	
101485560	Aardvark, Mary G	01/01/2007				<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/14/2008	
101485554	Aardvark, Mary W	01/01/2007				<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/14/2008	
101485561	Aardvark, Maura	01/01/2007				<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/14/2008	
1341669708	Aardvark, Nancy	01/01/2007	Springfield	Windsor	(802) 222-2222	<input checked="" type="checkbox"/>	<input type="checkbox"/>	02/02/2007	
1124423333	Aardvark, Patrick Clifford	02/02/2007	Sheldon	Franklin	(802) 444-4444	<input type="checkbox"/>	<input type="checkbox"/>	02/02/2007	Harry Benoit
101485556	Aardvark, Paula	01/01/2007				<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/14/2008	Bonnie Hanson
101485562	Aardvark, Paulette	01/01/2007				<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/14/2008	
101334455	Aardvark, Petunia	08/28/2007				<input type="checkbox"/>	<input type="checkbox"/>	08/28/2007	
101485559	Aardvark, Sally	01/01/2007				<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/14/2008	

Page 1, 33 of 33 Items, 1 Selected (Filters Applied)

TRACEVH SAMS2K_VT_DAIL 2/12/2008 11:08 AM

Add (SSN and DOB)

A new consumer record appears with the current date as the date registered. If this is not correct enter the correct date registered. To create a new client you must enter the Social Security Number and date of birth and name. Then you can follow the directions for editing an existing consumer record.

The screenshot displays the Social Assistance Management System (SAMS) interface. The main window is titled "Untitled - Consumer" and shows a form for editing a consumer record. The form is divided into several sections, with the "General" section currently selected. The "General" section contains the following fields:

Prefix	
First Name	
MI	
Last Name	
Suffix	
Maiden Name	
AKA Name	
Date Registered	09/08/2005
Consumer Details Last Reviewed	09/08/2005
Marital Status	
Gender	
Birth Date	
SSN	
Info Release Authorized	No
Default Agency	
Area Code	802
Home Phone	
Residential Address	
Mailing Address	
NAPIS	
Status	
Insurance	

The interface also shows a navigation pane on the left with categories like Summary, Details, Assessments, Care Management, Service Orders, and Service Delivery. The bottom status bar displays the user "STATEADMIN", the session "SAM52K_VT_DAIL", the date "9/8/2005", and the time "12:31 PM".

Entering the Consumer Record

Below is a summary of the consumer record, which appears when you open a consumer. To enter demographic and program application data for a client you must click on Details in the Contents column on the left.

Social Assistance Management System - [Aardvark, Aaron - Consumer]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Aaron - Consumer

Close Consumer Save Save and Close

Aardvark, Aaron 102443222 01/02/1944 61 Not Specified

Contents

Aardvark, Aaron - Consumer Summary

Personal		NAPIS	
Client ID	102443222	Ethnicity	Not Hispanic or Latino
SSN	444-33-3222	In Poverty	No
Birth Date	01/02/1944	Lives Alone	No
Age	61	High Nutritional Risk	Yes
Gender	Male	Is Rural	Don't Know
Marital Status	Widowed	Number of ADLs	6
Language	English	Number of IADLs	8
Home Phone	Not Specified		
Info Release Authorized	No	Ethnic Races	
Date Registered	07/22/2004	Black/African American	
Consumer Details Last Revi...	07/22/2004	Caregivers	
Active	Yes	Aardvark, Abel Other Relative	
Residential Address		Care Recipients	
Springfield, VT 05156			
County of Windsor		Care Management	
Municipality of Springfield DAIL O		None	

STATEADMIN SAMS2K_VT_DAIL 9/8/2005 12:32 PM

12:34 PM

To enter data for the fields in details simply type in the data in the correct field and hit the arrow key to go down to the next field.

Social Assistance Management System - [Aardvark, Aaron - Consumer]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Aaron - Consumer

Close Consumer Save Save and Close Print Consumer Print Preview Consumer

Aardvark, Aaron 102443222 01/02/1944 61 Not Specified

Contents

- Summary
- Details
- Assessments
- Care Management
- Service Orders
- Service Delivery

Aardvark, Aaron - Details

- General**
- Contacts
- Locations (2)
- Phones
- User Fields
- Ethnic Races (1)
- Care Enrollments (9)
- Care Managers
- Fund Identifiers
- Providers
- Caregivers (1)
- Care Recipients (1)

Prefix	
First Name	Aaron
MI	
Last Name	Aardvark
Suffix	
Maiden Name	
AKA Name	
Date Registered	07/22/2004
Consumer Details Last Reviewed	07/22/2004
Marital Status	Widowed
Gender	Male
Birth Date	01/02/1944
SSN	444-33-3222
Info Release Authorized	No
Default Agency	
Area Code	802
Home Phone	
Residential Address	
Street 1	
Street 2	
County	Windsor
Town	Springfield

STATEADMIN SAMS2K_VT_DAIL 9/8/2005 12:32 PM

Start 12:35 PM

NOTE: The Residential Address indicates where the consumer actually resides. If a Home Based consumer, this should be the consumer's home. If a long-term or permanent NH or ERC consumer, the Residential Address will be the address of the Nursing Home or Residential Care Home. The consumer's town, county and state prior to admission to NH, ERC or ALR would then be entered in the Locations section of the Consumer Record. For more detailed information on entering this data, see the attached SAMS Entry Instructions for Choices for Care.

Enter DAIL District Office

To enter the CFC DAIL District office, click on municipality and choose the correct office from the list.

Social Assistance Management System - [Aardvark, Aaron - Consumer]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Aaron - Consumer

Close Consumer Save Save and Close Print Consumer Print Preview Consumer

Aardvark, Aaron 102443222 01/02/1944 61 Not Specified

Contents

- Summary
- Details
- Assessments
- Care Management
- Service Orders
- Service Delivery

Aardvark, Aaron - Details

General

Gender	Male
Birth Date	01/02/1944
SSN	444-33-3222
Info Release Authorized	No
Default Agency	
Area Code	802
Home Phone	

Residential Address

Street 1	
Street 2	
County	Windsor
Town	Springfield
State	VT
ZIP Code	05156
Municipality	Springfield DAIL Office
Directions To Home	

Mailing Address

Hartford DAIL Office
Orange West waiver team
Rutland DAIL Office
Springfield DAIL Office
Windsor waiver team

NAPIS

Status

Insurance

Other

Characteristics

STATEADMIN SAMS2K_VT_DAIL 9/8/2005 12:33 PM

12:35 PM

CFC User Fields and Vulnerable Client Information

To enter the Setting Before Application, Wait List Score and whether the client vulnerable (and why), see the CFC User Fields and Vulnerable section under Details after entering the Dail District Office. It will be easier to enter on this screen rather than in the User Fields section.

Social Assistance Management System - [Aardvark, Tracey A - Consumer]

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Reports Aardvark, Tracey A - Consumer

Close Consumer Save Save and Close Print Consumer Print Preview Consumer

Aardvark, Tracey A | 605474321 | 06/05/1947 | 61 | 06/24/2008 - 06/23/2009 | Aardvark WCIC match e Aardvark-test

Aardvark, Tracey A - Details

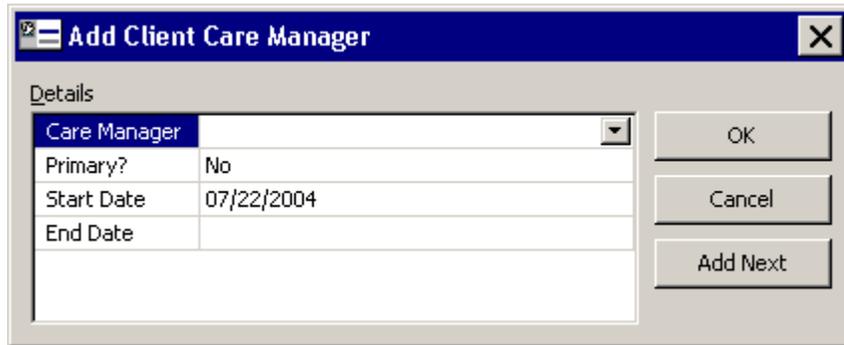
- General
- Contacts
- Locations (2)
- Phones (1)
- User Fields
- Ethnic Races (2)
- Care Enrollments (3)
- Co-Pay
- Care Managers (1)
- Fund Identifiers
- Providers
- Caregivers
- Care Recipients
- Service Suspensions

Personal	
Prefix	
First Name	Tracey
MI	A
Last Name	Aardvark
Suffix	
Maiden Name	
AKA Name	
Date Registered	07/24/2007
Consumer Details Last Reviewed	07/24/2007
Marital Status	Married
Gender	Female
Birth Date	06/05/1947
SSN	987-65-4321
Info Release Authorized	No
Default Agency	
Area Code	802
Home Phone	862-9999
Residential Address	
Street 1	123 Main
Street 2	
County	Chittenden
Town	South Burlington
State	VT
ZIP Code	05403
Municipality	Burlington DAIL Office
Directions To Home	
Mailing Address	
NAPIS	
Status	
Insurance	
Other	
Characteristics	
R=Home,N=NF,E=ERC,H=Hosp,C=Cor	
CFC user fields	
CFC Wait Score	
Vulnerable	
deaf-hearing	Don't Know
Mobility impaired	Don't Know
Vulnerable client	Don't Know
develop disability	Don't Know
Life support	Don't Know
Blind	Don't Know
Speech impaired	Don't Know

TRACEYH | SAMS2K_VT_DAIL | 8/6/2008 | 4:26 PM

Entering Case Managers

Click on “Care Managers” in the left hand pane. A pop up box will appear as shown below. Choose a Case Manager from the pull down box and mark whether the case manager is the primary. Also, enter the Start Date for the Case Manager. Repeat for as many case managers the consumer has. Please note that Case Managers also need to be linked on the Care Plan as well. This is discussed in a later section.



Details	
Care Manager	
Primary?	No
Start Date	07/22/2004
End Date	

2. Care Enrollments

Enroll Consumer in Program

To enroll in a care program, click on “Care Enrollments” in the left hand column of details. This will show a history of all care programs.

NOTE: When adding a consumer, a default program will show. If this program is not correct, you may edit the Enrollment.

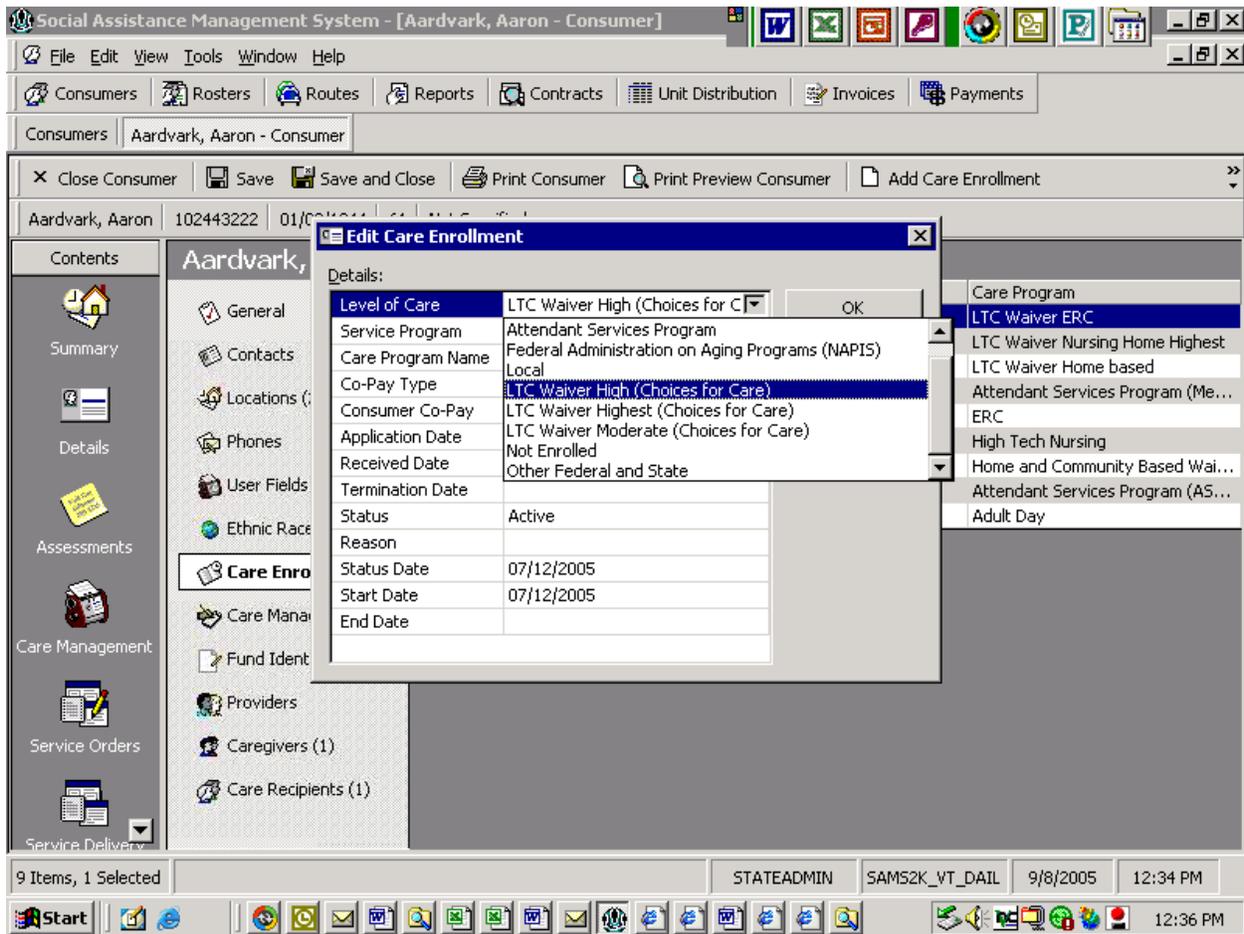
The screenshot displays the SAMS application window for 'Aardvark, Aaron - Consumer'. The main content area shows a table of care enrollments with the following data:

Status	Status Date	Start Date	End Date	Care Program
Active	07/12/2005	07/12/2005		LTC Waiver ERC
Active	07/01/2005	07/01/2005		LTC Waiver Nursing Home Highest
Active	05/19/2005	05/19/2005		LTC Waiver Home based
Active	07/22/2004	07/22/2004		Attendant Services Program (Me...)
Active	07/22/2004	07/22/2004	09/30/2005	ERC
Active	07/22/2004	07/22/2004		High Tech Nursing
Active	07/22/2004	07/22/2004	05/18/2005	Home and Community Based Wai...
Active	07/22/2004	07/22/2004		Attendant Services Program (AS...)
Active	07/22/2004	07/22/2004		Adult Day

The interface also shows a sidebar with navigation options like Summary, Details, Assessments, Care Management, Service Orders, and Service Delivery. The bottom status bar indicates '9 Items, 1 Selected' and the user is 'STATEADMIN' on '9/8/2005' at '12:33 PM'.

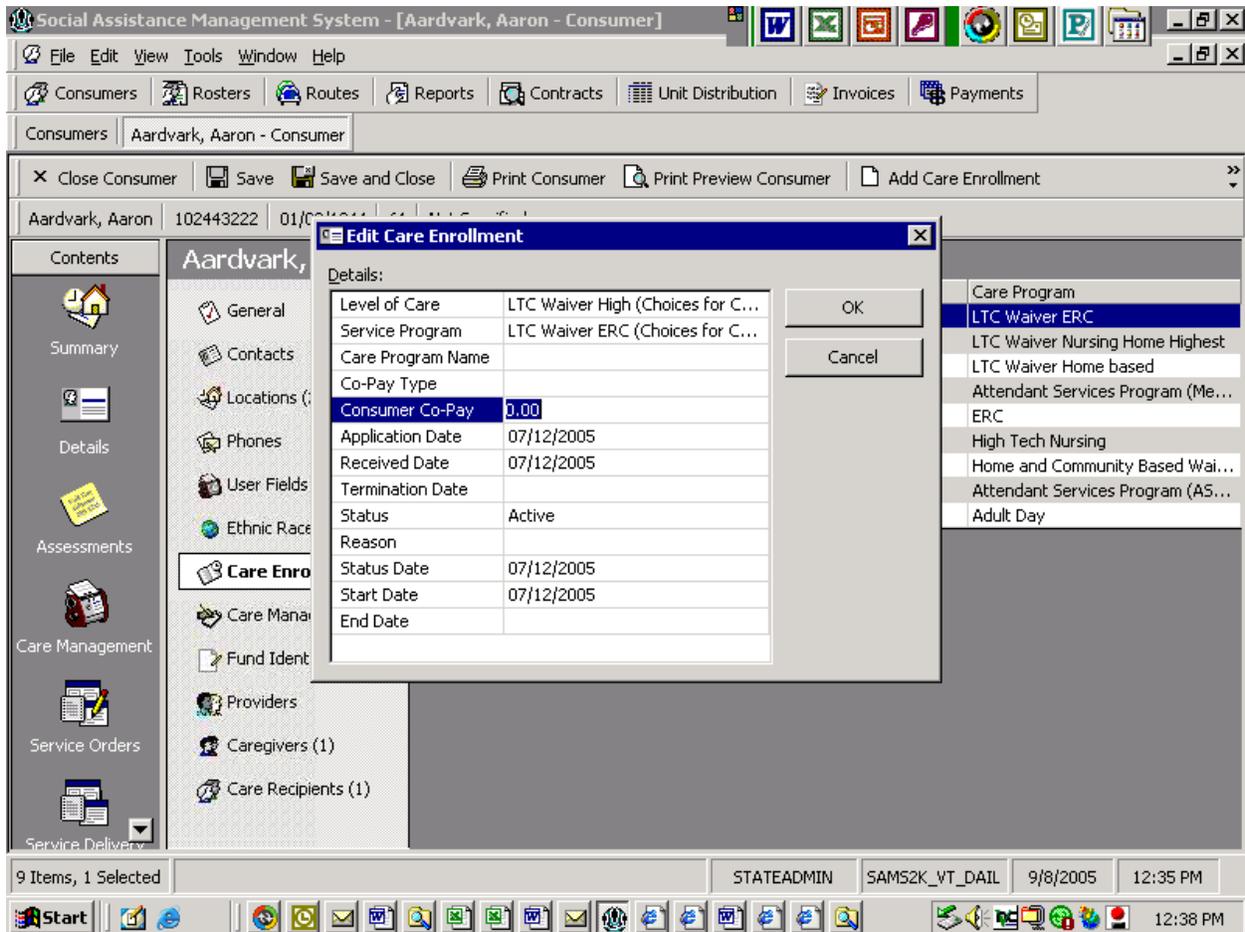
To add a new care program click on Add Care Enrollment. Then click on the level of care arrow to choose a level of care (highest, high or moderate), Then choose a service program.

When you click on Level of Care and/or Service program and you can choose from a list. You must also correct the application date, received date, status date and start date if you are adding a new program to an existing consumer. If it is a new consumer the dates will default to the current date and you must correct if needed.



Patient Share

If there is a patient share enter it in the Co-Pay field.



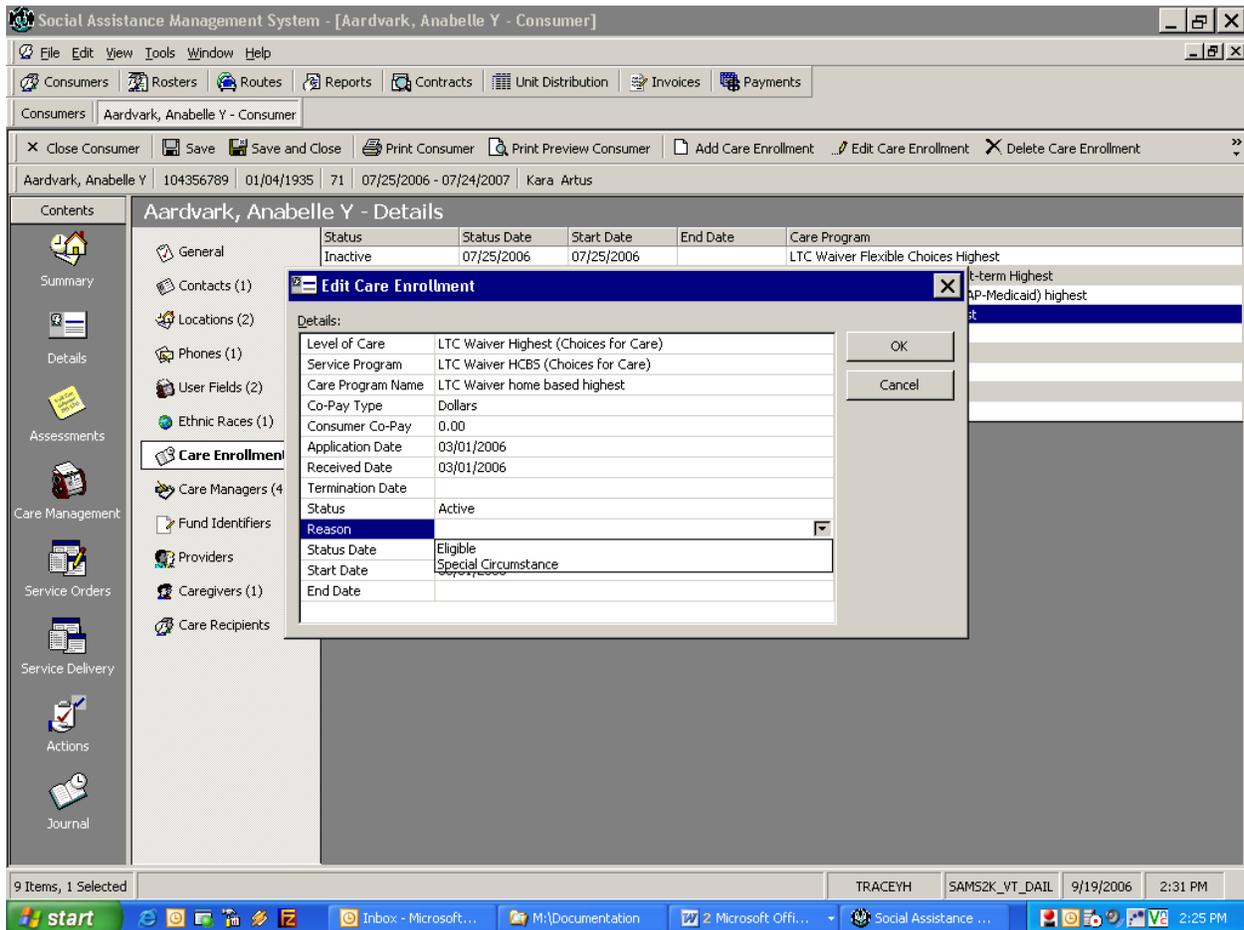
Dates on Care Enrollment

There are various dates on the Care Enrollment as seen on the previous page. The definitions of the dates are as follows:

- Application Date: The date the application was signed by the consumer.
- Received Date: The date the application was received by DAIL/DDAS.
- Termination Date: The date a consumer is terminated ('disenrolled') from a care program (ie: a change in setting or level of care, voluntary withdrawal, move to another state, death).
- Status Date: The date of the current Status. For more detailed information on what these dates mean, see the SAMS Quick Reference Guide.
- Start Date: The date that Care Enrollment and services begin.
- End Date: The date that Care Enrollment and services end. This field is left blank until the consumer terminates from the care program.

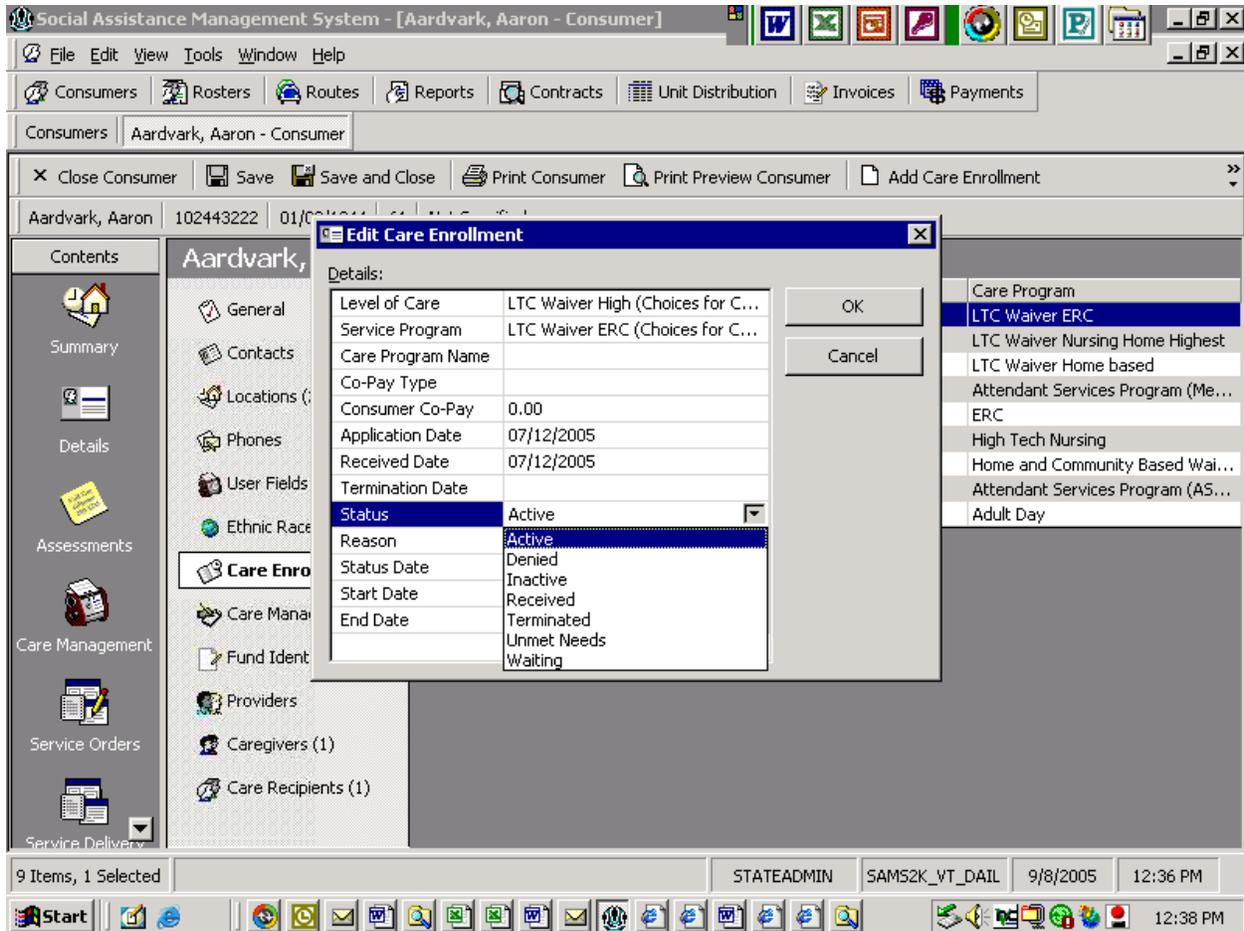
Status & Reason

Multiple statuses may be linked to Care Enrollment. The Reason explains the Status, and is directly related to a specific Status. Below, note that 'Eligible' and 'Special Circumstance' are the only two Reasons available for 'Active' status. When a status of 'Terminated' is chosen, a different and longer list of reasons appears. For a listing of all Statuses and Reasons, see the SAMS Quick Reference Guide.



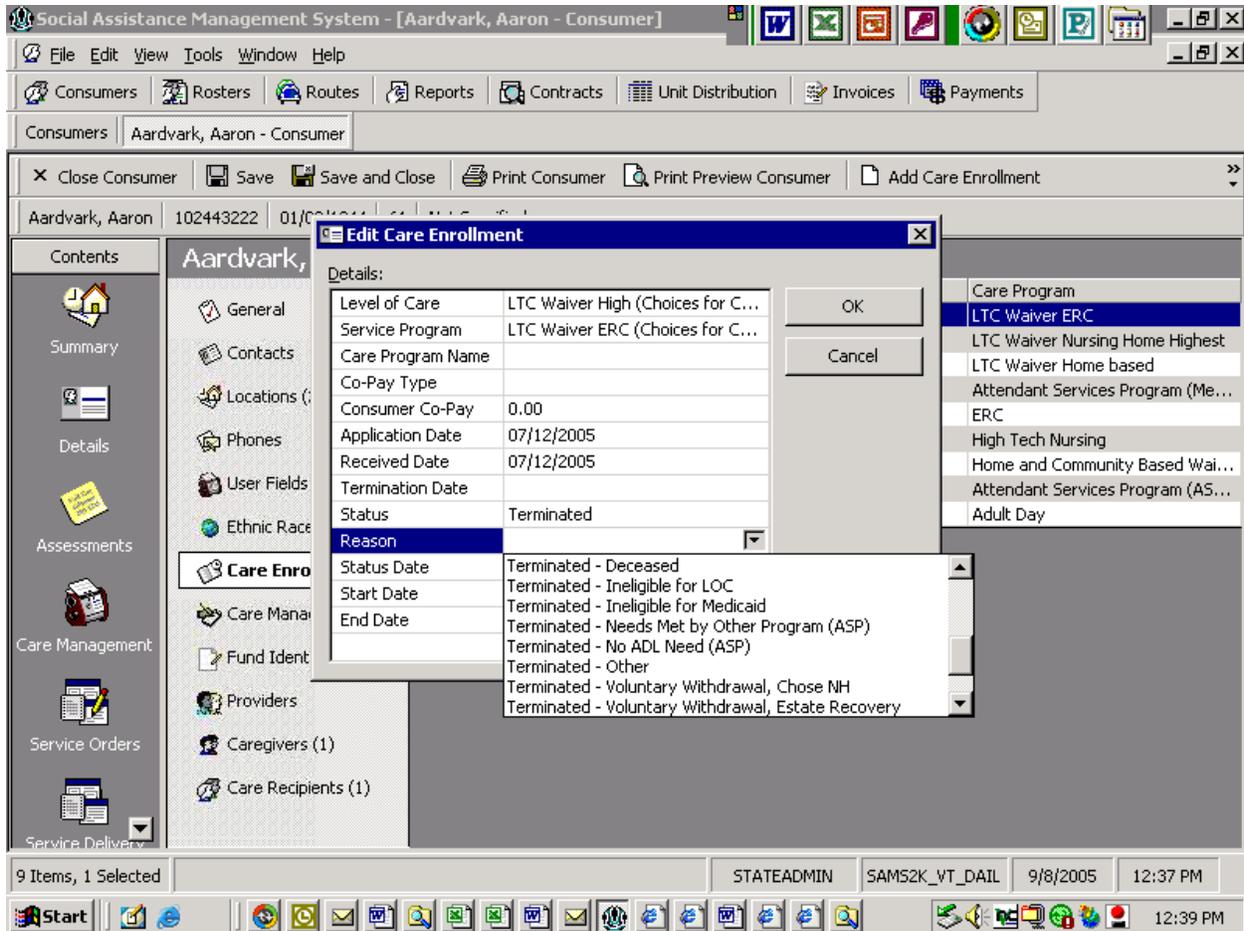
Modify Program Status

Program status is picked from the list and must be updated as the status changes from received to waiting to active to terminated. There are also reasons associated with a status and a reason should be chosen as well.



Terminating Consumer from Program

To terminate a consumer from a program, choose the terminated status and choose a reason. Also enter the termination date, end date and the status date. See the Dates on Care Enrollment section for definition of these dates.



NOTE: When terminating a consumer due to death, it is necessary to terminate the Care Enrollment AND make the consumer inactive in the Status section under Details on the Consumer. Please refer to the Quick Reference Guide for any questions on Statuses and Reasons.

3. Entering Consumer Plan of Care

Open Plan of Care

Plan of care data is in the Care Management section of the Contents column. Click on Care Management and the Plan of Care section will open.

The screenshot shows the SAMS application window for 'Aardvark, Aaron - Consumer'. The 'Contents' sidebar on the left has 'Care Management' selected. The main window displays a table of care plans for Aaron Aardvark.

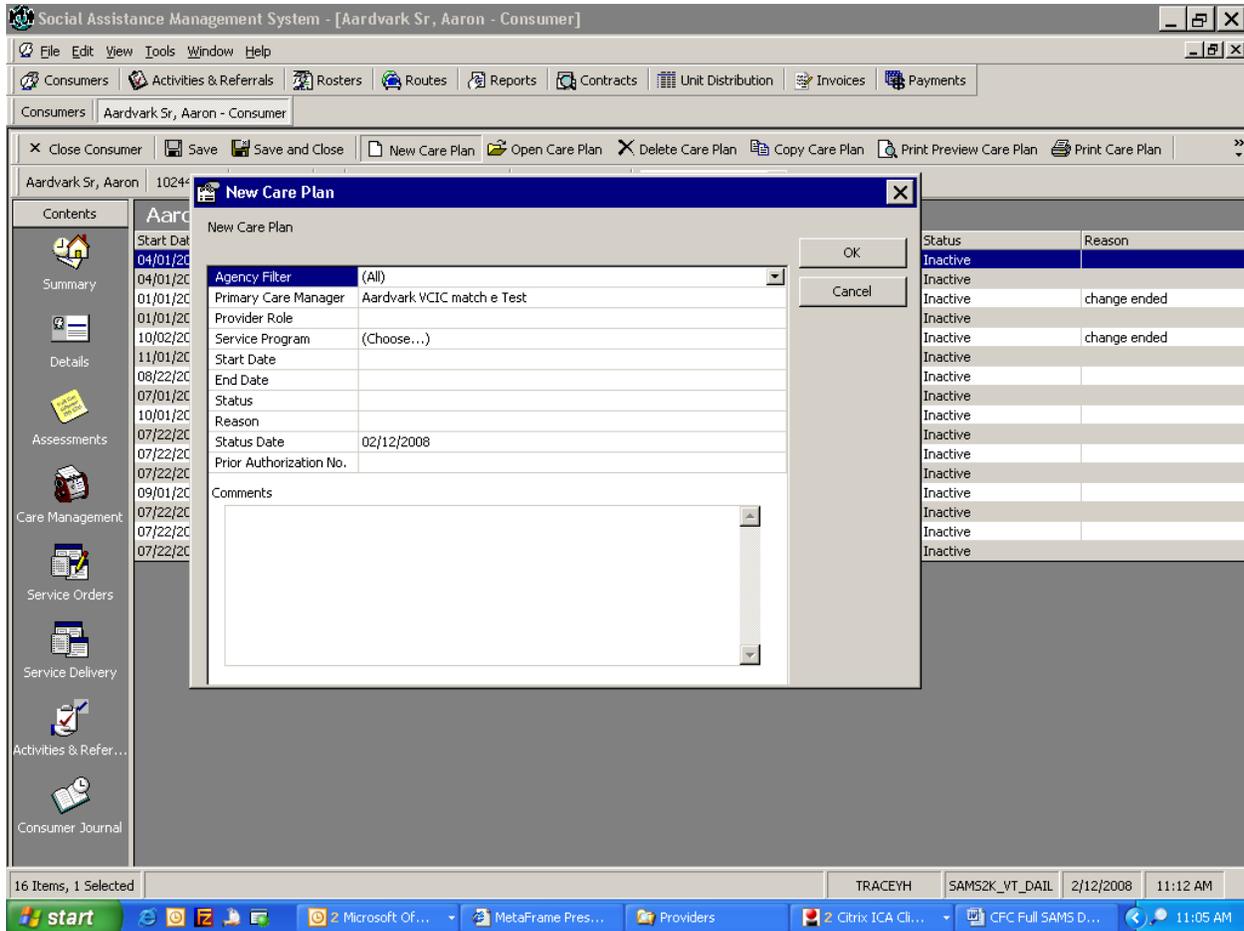
Start Date	End Date	Total Cost	Care Program	Primary Care Manager	Status
07/12/2005	07/11/2006	\$780.00	LTC Waiver ERC	Default Care Manager	
05/19/2005	05/18/2006	\$3,763.50	LTC Waiver Hom...	Default Care Manager	Reassessment
07/01/2005	09/30/2005	\$13,835.70	LTC Waiver Nursi...	Default Care Manager	
07/22/2004	07/21/2005	\$1,435.28	Attendant Servic...	Toni m Morgan	
07/22/2004	07/21/2005	\$520.00	Attendant Servic...	Alana Langmaid	
09/01/2004	02/28/2005	\$17,317.44	Home and Comm...	Connie Van Dine	
07/22/2004	01/21/2005	\$0.00	ERC	Connie Van Dine	
07/22/2004	01/21/2005	\$0.00	High Tech Nursing	Default Care Manager	
07/22/2004	01/21/2005	\$6,608.00	Adult Day	Default Care Manager	
07/22/2004	08/31/2004	\$55.00	Home and Comm...	Connie Van Dine	Change

Add a Plan of Care

The care management screen above shows existing plans of care. To add a new Plan of Care, click on New Care Plan

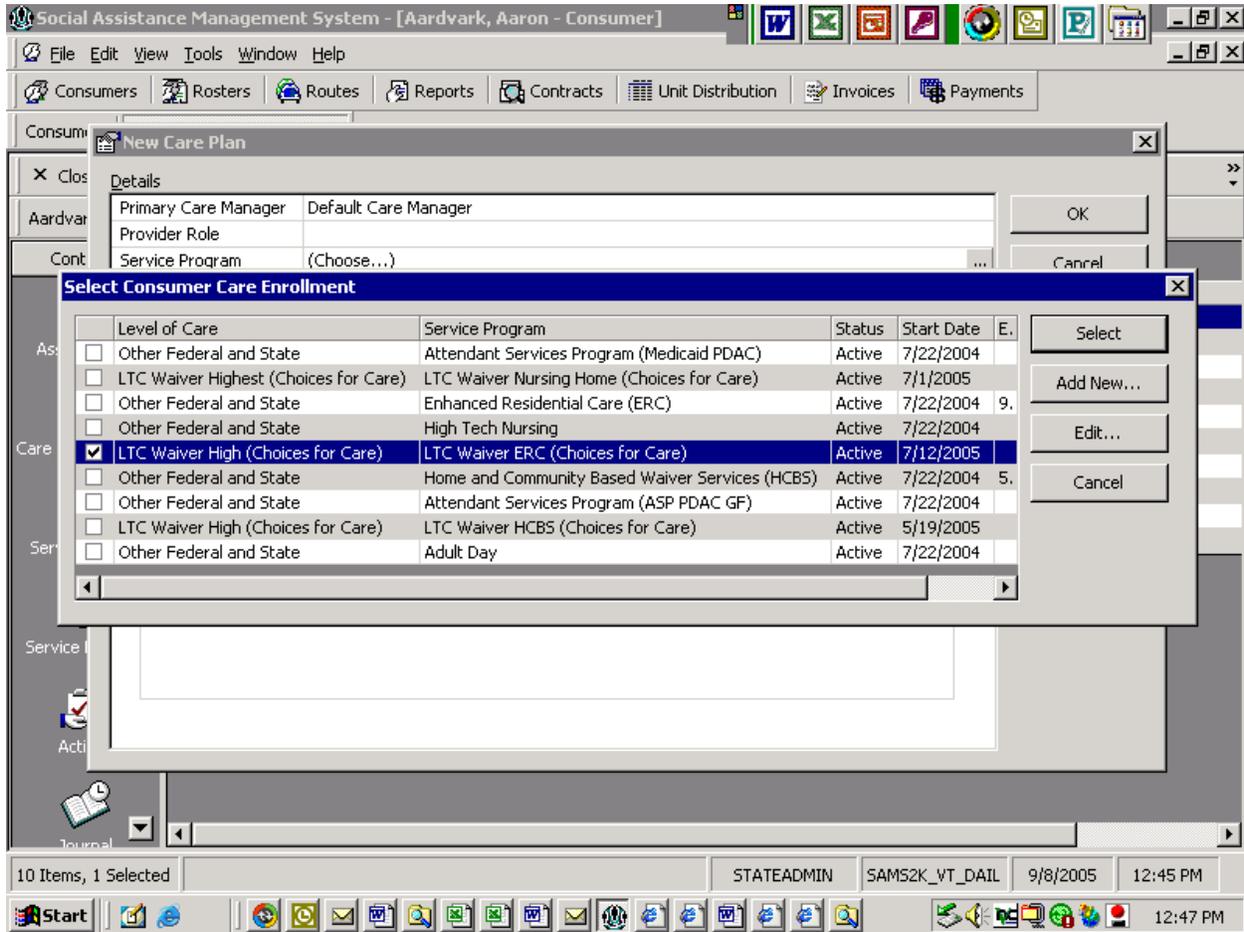
Plan of Care - Care Manager

To create a plan of care you need to choose a care manager and a service program from the drop down lists. You also need to enter the start and end dates of the care plan.



Plan of Care Service Program

Clicking on the appropriate box in the drop down list chooses the service program and click add new.



Modify Plan of Care

When the Care Plan is created or an existing Care Plan is opened, the Care Plan Summary page appears. To modify the overall Care Plan click on Modify Care Plan. To create or modify a service plan click on Service Plan in the contents column.

Social Assistance Management System - [Aardvark, Aaron - Care Plan]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Aaron - Consumer Aardvark, Aaron - Care Plan

Close Care Plan Save Save and Close

Aardvark, Aaron | 102443222 | 01/02/1944 | 61 | LTC Waiver High (Choices for Care) | LTC Waiver ERC (Choices for Care) | 07/12/2005-07/11/2006 >>

Contents

- Summary
- Worksheet
- Service Plan
- Service Schedule
- Goals
- Journal

Aardvark, Aaron - Care Plan Summary

Start Date	07/12/2005	Modify Care Plan...
End Date	07/11/2006	
Prior Authorization No.		
Level of Care	LTC Waiver High (Choices for Care)	Goal Statements
Service Program	LTC Waiver ERC (Choices for Care)	Worksheet Entries
Care Program	LTC Waiver ERC	Completed 0 entries
Status		Care Managers
Status Date	None	Default C...
Reason		Diagnosis Codes
Personal		
Full Name	Aardvark, Aaron	
Client ID	102443222	
Home Phone		
Town	Springfield	
DOB	01/02/1944	
Age	61	
Service Plan		
ERC Tier 3 (1 unit, Monthly)	\$780.00	
Total Cost	\$780.00	

STATEADMIN | SAMS2K_VT_DAIL | 9/8/2005 | 12:46 PM

12:48 PM

4. Entering Consumer Service Plan

Add a Service Plan

When service plan is chosen by double clicking the listing, the screen below appears. If there are existing services in the plan they will appear if it is a new plan it will be blank as below. To add a service click Add Service.

Social Assistance Management System - [Aardvark Sr, Aaron - Care Plan]

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark Sr, Aaron - Consumer Aardvark Sr, Aaron - Care Plan

Close Care Plan Save Save and Close Print Preview Care Plan Print Care Plan Service Orders Add Service Edit Service Delete Service

Print Service Print Preview Service Grand Total Only

Aardvark Sr, Aaron 102443222 01/02/1944 64 LTC Waiver Highest (Choices for Care) LTC Waiver Nursing Home (Choices for Care) 7/1/2005-12/31/2005 CVCOA Agency

Aardvark Sr, Aaron - Care Plan Service Plan

Service	Provider	Start Date	End Date	Units	Unit Type	Unit Cost	Total Units	Monthly Cost	Total Cost	Has Exceptions?
Nursing Home	Berlin NH			181.80	Days	\$145.15	181.80	\$4,398.04	\$26,388.27	<input type="checkbox"/>
Grand Total				181....			181.80	\$4,398.04	\$26,388....	

1 Item, 1 Selected

TRACEYH SAMS2K_VT_DAIL 2/12/2008 11:14 AM

start 2 Microsoft Of... MetaFrame Pres... Providers 2 Citrix ICA Cli... CFC Full SAMS D... 11:07 AM

Add services to service plan

Choose the fields in the following order: Agency, Provider, Service, Unit Price. The Service Category will automatically populate. If it does not populate, leave blank. Once these fields are entered, click Add on the right side of the screen under Service Plan Schedules. This tells SAMS the units allocated for the Service Plan. In the special instruction field you can enter maximum units allowed for a service such as 48 hrs/year for case mgt. You must enter the Agency and the provider of the service from dropdown lists. When you have a provider and a service the unit cost will appear automatically.

Enter the Units Allocated in the appropriate field. Then, choose the allocation type that coincides with the service plan you are entering. See the Choices for Care Procedures Manual for information on allocation types. The Frequency refers to the Allocation Type. For instance, if a Service Plan is for every two weeks, the Allocation Type would be "weekly" and the Frequency would "2". This would mean the consumer receives the units every 2 weeks.

NOTE: Start and End dates should *never* be entered on individual services. The dates are entered at the Care Plan level and filter into the Service Plan accordingly.

The screenshot displays the SAMS application window for 'Aardvark Sr, Aaron - Care Plan'. The main content area shows a table of services with the following data:

Service	Provider	Start Date	End Date	Units	Unit Type	Unit Cost	Total Units	Monthly Cost	Total Cost	Has Exceptions?
Nursing Home	Berlin NH			181.80	Days	\$145.15	181.80	\$4,398.04	\$26,388.27	<input type="checkbox"/>
Grand Total				181....			181.80	\$4,398.04	\$26,388....	

The 'Service Plan Details' panel on the right shows the following information:

- Agency: Berlin Health & Rehab Center
- Provider: Berlin NH
- Service: Nursing Home
- Unit Price: \$145.15
- Service Category: (0 Items)
- Schedules: (1 Schedule)
- Status: (Not indicated)
- Special Instructions: (Empty)
- Subprovider: (Empty)
- Fund Identifier: (Empty)
- Caregiver: (Empty)
- Site: (Empty)
- Start Date: (Empty)
- End Date: (Empty)
- Unit Type: Days
- Units Allocated: 181.80
- Posted Deliveries: 0.00
- Pending Orders: 0.00
- Desired Outcome: (Empty)

The 'Service Plan Schedules' section shows a summary of 30.3 Units Monthly and a detailed view of the schedule with the following fields:

- Units Allocated: 30.30
- Allocation Type: Monthly
- Frequency: 1
- Start Date: (Empty)
- End Date: (Empty)
- Subservice: (Empty)

An example of a complete service plan is below.

Social Assistance Management System - [Aardvark Sr, Aaron - Care Plan]

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark Sr, Aaron - Consumer Aardvark Sr, Aaron - Care Plan

Close Care Plan Save Save and Close Print Preview Care Plan Print Care Plan Service Orders Add Service Edit Service Delete Service Apply

Print Service Print Preview Service Grand Total Only

Aardvark Sr, Aaron | 102443222 | 01/02/1944 | 64 | LTC Waiver High (Choices for Care) | LTC Waiver ERC (Choices for Care) | 07/12/2005-10/01/2005 | HASS Coordinator

Contents

Aardvark Sr, Aaron - Care Plan Service Plan

Service	Provider	Start Date	End Date	Units	Unit Type	Unit Cost	Total Units	Monthly Cost	Total Cost	Has Exceptions?
Service Plan Details										
Apply & Close Undo Changes Show Calendar Average Weekly Cost: \$43.33 Average Monthly Cost: \$130.00 Total Cost: \$520.00 Total Units: 8										
Agency	Addison County Home Health Agency									
Provider	Home Health Agency									
Service	ERC case mgt HHA									
Unit Price	\$65.00									
Service Category	LTC Waiver Service									
Subservices	(0 Items)									
Schedules	(1 Schedule)									
Status	(Not indicated)									
Special Instructions	48 hr max									
Subprovider										
Fund Identifier										
Caregiver										
Site										
Start Date	07/12/2005									
End Date										
Unit Type	1 hour(s)									
Units Allocated	8.00									
Posted Deliveries	0.00									
Pending Orders	0.00									
Desired Outcome										

Service Plan Schedules

Add Edit Delete

Summary	Duration	Subservice
2 Units Monthly	7/12/2005 - Open	

Service Plan Schedule

Apply Apply & Close Undo Changes Close

Summary	1 Unit Monthly.
Units Allocated	1.00
Allocation Type	Monthly
Frequency	1
Start Date	07/12/2005
End Date	
Subservice	

0 Items | TRACEYH | SAMS2K_VT_DAIL | 2/12/2008 | 11:29 AM

start | Microsoft Of... | MetaFrame Pres... | Providers | Citrix ICA Cl... | CFC Full SAMS D... | 11:22 AM

Modify a Service Plan

After entry each service will appear with all other services in the care plan as seen below. To modify an existing Service Plan click the service plan you want to modify and then change data or add new services.

The screenshot shows the 'Social Assistance Management System - [Aardvark, Aaron - Care Plan]' window. The main area displays the 'Aardvark, Aaron - Care Plan Service Plan' table:

Service	Provider	Allocation Type	Start Date	End Date	Units	Unit Type	Unit Cost	Total Units	Monthly
ERC case mgt HHA	Home Health Agency	Monthly			2.00	1 hour(s)	\$65.00	26.00	\$130.00
ERC Tier 3	ERC RCH Agency	Monthly			1.00	Days	\$60.00	13.00	\$780.00
Grand Total					3.00			39.00	\$1938.00

The interface also shows a sidebar with navigation options: Summary, Worksheet, Service Plan, Service Schedule, and Goals. The status bar at the bottom indicates '2 Items, 1 Selected' and shows the user 'STATEADMIN' on '9/8/2005' at '12:50 PM'.

Click save and close to save the service plan and close the consumer

5. Assessments

Types of Assessments

To access the assessments, click the Assessments button in the Contents column. Once getting to the Assessments screen, if this is the first assessment for the consumer, click "New Assessment". For reassessments, there is another process you may use that is defined under the Reassessments section of this topic. However, you may always use the "New Assessment" to add a new assessment regardless of whether it is a reassessment or a new assessment.

Social Assistance Management System - [Aardvark, Tracey A - Consumer]

Consumers | Reports | Aardvark, Tracey A - Consumer

Close Consumer | Save | Save and Close | New Assessment | Edit Assessment | Reassess | Delete Assessment | Print | History | Refresh | BenefitsCheckUp | LIS Application | SAMSApp

Aardvark, Tracey A | 605474321 | 06/05/1947 | 61 | 06/24/2008 - 06/23/2009 | Aardvark VCIC match e Aardvark-test

Aardvark, Tracey A - Assessments

Date of Assessment	Next Assessment ...	Assessor	Last Updated	Updated By	Assessment Form	Filename	Check-Out Date/Time
08/04/2008	08/04/2009		08/04/2008 12:40:06 PM	TRACEYH	VT Dail CFC Wait Score	S:\Omnia\Assessment Forms\VT DAIL CFC Wait List Score 2008.afm	
08/04/2008	08/04/2009		08/04/2008 10:59:15 AM	TRACEYH	VT Dail CFC Wait Score	S:\Omnia\Assessment Forms\VT DAIL CFC Wait List Score 2008.afm	
07/31/2008	07/31/2009		08/04/2008 10:59:01 AM	TRACEYH	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
07/31/2008	07/31/2009		07/31/2008 08:33:31 AM	TRACEYH	VT DAIL CFC clinical certification	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Cert 2008.afm	
07/23/2008	07/23/2009		07/31/2008 08:31:41 AM	TRACEYH	VT PHPG RCH/ERC resident ass...	S:\Omnia\Assessment Forms\VT PHPG CRA 2008.afm	
07/15/2008		Tracey Harrington	07/31/2008 08:30:44 AM	TRACEYH	VT DAIL CFC clinical certification	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Cert 2008.afm	
07/17/2008	01/17/2009		07/23/2008 09:28:09 AM	TRACEYH	VT DAIL RCH/ERC resident ass...	S:\Omnia\Assessment Forms\VT DAIL CRA 2008.afm	
07/22/2008	07/22/2009		07/22/2008 03:47:54 PM	TRACEYH	VT PHPG Full ILA 08	S:\Omnia\Assessment Forms\VT PHPG Full NSI-ILA 2008.afm	
07/22/2008	07/22/2009	Tracey Harrington	07/22/2008 02:29:03 PM	TRACEYH	VT Dail CFC Wait Score	S:\Omnia\Assessment Forms\VT DAIL CFC Wait List Score 2008.afm	
06/25/2008	06/25/2009		07/15/2008 11:58:34 AM	TRACEYH	VT DAIL Full ILA 08	S:\Omnia\Assessment Forms\VT DAIL Full NSI-ILA 2008.afm	
06/10/2008	06/10/2009		06/25/2008 08:59:32 AM	TRACEYH	VT DAIL Full ILA 08	S:\Omnia\Assessment Forms\VT DAIL Full NSI-ILA 2008.afm	
06/04/2008		Celine Aprillano, RN ...	06/10/2008 11:40:45 AM	TRACEYH	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
05/20/2008		Tracey Harrington	05/20/2008 10:07:11 AM	TRACEYH	VT DAIL CFC clinical certification	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Cert 2008.afm	
05/20/2008		Tracey Harrington	05/20/2008 09:40:59 AM	TRACEYH	VT Dail CFC Wait Score	S:\Omnia\Assessment Forms\VT DAIL CFC Wait List Score 2008.afm	
05/12/2008	05/12/2009		05/20/2008 09:15:14 AM	TRACEYH	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
05/06/2008		Tracey Harrington	05/06/2008 02:01:05 PM	TRACEYH1	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
04/23/2008			05/02/2008 01:34:04 PM	TRACEYH	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
02/25/2008	02/25/2009		03/25/2008 12:53:11 PM	TRACEYH	VT DAIL ASP Authorization	S:\Omnia\Assessment Forms\VT DAIL ASP Authorization.afm	
03/17/2008	03/17/2009		03/17/2008 09:43:43 AM	TRACEYH	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
03/17/2008	03/17/2009	Tracey Harrington	03/17/2008 08:36:15 AM	TRACEYH	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
03/14/2008		Tracey Harrington	03/14/2008 11:17:26 AM	TRACEYH	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
03/12/2008		Tracey	03/12/2008 01:22:38 PM	TRACEYH	VT Dail CFC Wait Score	S:\Omnia\Assessment Forms\VT DAIL CFC Wait List Score 2008.afm	
03/12/2008		Tracey	03/12/2008 01:21:57 PM	TRACEYH	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
03/10/2008	03/10/2009		03/10/2008 02:16:17 PM	TRACEYH	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
03/07/2008		Julie Bigelow RN,LTCCC	03/07/2008 10:50:27 AM	JULIEB	VT DAIL CFC Clinical Assessment	S:\Omnia\Assessment Forms\VT DAIL CFC Clinical Assessment 2008...	
02/21/2008	08/21/2008		02/21/2008 11:03:47 AM	TRACEYH	VT DAIL Full ILA 07 v1	S:\Omnia\Assessment Forms\VT DAIL Full NSI-ILA 2007.afm	
02/21/2008	08/21/2008	Tracey Harrington	02/21/2008 08:59:38 AM	TRACEYH	VT DAIL Full ILA 07 v1	S:\Omnia\Assessment Forms\VT DAIL Full NSI-ILA 2007.afm	
10/24/2007	04/24/2008		02/15/2008 09:39:35 AM	TRACEYH	VT DAIL Full ILA 06	S:\Omnia\Assessment Forms\VT DAIL Full NSI-ILA 2006.afm	
01/05/2008	07/05/2008		01/10/2008 09:48:45 AM	TRACEYH	VT DAIL ASP Authorization	S:\Omnia\Assessment Forms\VT DAIL ASP Authorization.afm	

29 Items, 1 Selected

TRACEYH | SAMS2K_VT_DAIL | 8/6/2008 | 3:38 PM

Once clicking "New Assessment", the following box will appear. Pull down the arrow in the Filename line in the Assessment Form section. This is the form you will be using to perform the assessment. Below, I have chosen the VT Dail Adult Day Intake 2006. If you do not see the desired form in the drop down, you will need to choose "Browse" and look on S:\Omnia\Assessment Forms for the appropriate form. The rest of the information in the Assessment Form section will automatically populate.

In the Organization section, you must enter the Agency for which the assessor works. This is required for the Assessment security to function properly. The next step is to enter the date the assessment is being completed. The Next Assessment Date should automatically populate based on your settings for when reassessments are due (6 months, 1 year, etc). Then, enter the Assessor, or the person who performed the assessment. **Do NOT enter a password on this screen.**

Details:	
Assessment Form	
Filename	S:\Omnia\Assessment Forms\VT DAIL Adult
Name	VT DAIL AD Intake
Author	Dick Lavery
Last Updated	8/15/2006 3:31:07 PM
Version	1.0.15
Organization	
Care Program	
Agency	Department Of Aging And Disabilities
Provider	
Subprovider	
Site	
Assessment	
Date of Assessment	08/06/2008
Next Assessment Date	08/06/2009
Assessor	Tracey Harrington
Password	
Verify Password	
Comments	

Click OK and the following message will appear.

Social Assistance Management System

 The assessment form contains indicators and must be saved before the indicators can be evaluated. If you choose not to save then indicators will not be active.

Do you want to save the assessment now?

Yes No Cancel

Say "Yes" to save and the assessment will open.

O.A. INDIVIDUAL IDENTIFICATION	
0. ILA is being completed for which (DAIL) program?	
1. Date of assessment?	07/25/2007
2. Unique ID# for client.	605474321
3.a. Client's last name?	Aardvark
3.b. Client's first name?	Tracey
3.c. Client's middle initial?	A
6. Client's Pension/Social Security Number?	987-65-4321
7. Client's date of birth?	06/05/1947
8. age of the client in years.	60
calculated age at assessment	60.1368925393566
9. Client's gender?	F. Female
10a. Enter the client's mailing street address or Post Office box.	123 Main
10b. Enter the client's mailing city or town.	South Burlington
10c. Enter the client's mailing state.	VT
10d. Enter the client's mailing ZIP code.	05403
11.a. residential street address or Post Office box.	10c. Enter the client's mailing state.
11.b. residential city or town.	South Burlington
11.c. Client's state of residence.	VT

General Description of Form Layout

On the screen above there are two major areas. The left hand column shows each section of the form. The right hand column shows the specific questions in each section. See Appendix A for examples of Assessment Forms.

If you click on the right hand section, all the questions in the form will be shown in the right hand area. You can go down sequentially through these questions using the down arrow on the keyboard or go back up with the up arrow.

If you want to go to a particular section, you can click on that section on the left hand side and only those questions in that section will appear on the right hand side. You can continue to go backwards or forwards anywhere you want and answer questions in any order you want.

Skip functions are built in so that some questions will be skipped if they are not relevant based on a previous answer. For example if someone says they do not have a legal guardian the questions asking about the name of the guardian will be skipped. However, the system will still allow the user to go back and ask that question again and enter answers if appropriate.

Indicators in an assessment

Indicators are calculations derived from the answers on the form. They are green triangles when all data needed is answered and red triangles when there is data missing for the calculation. The section called Summary of Wait List Scores is all indicators as seen below.

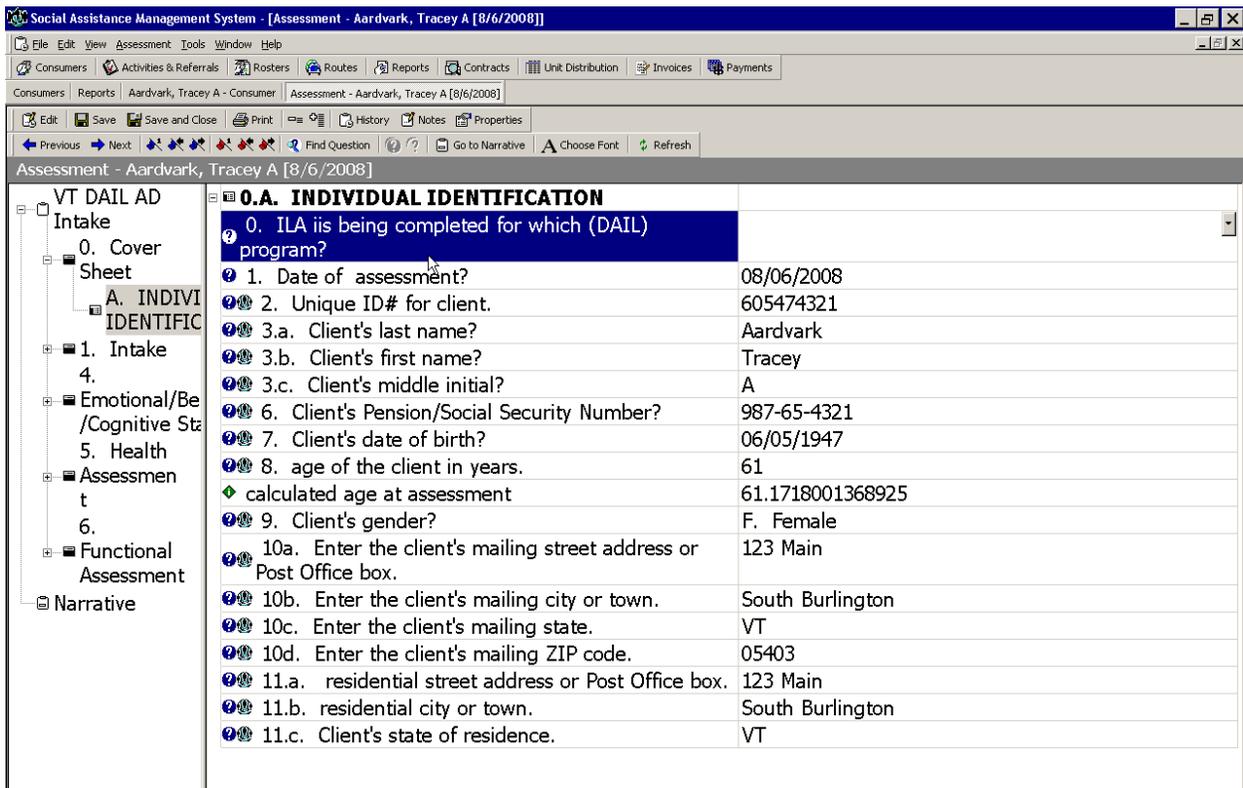
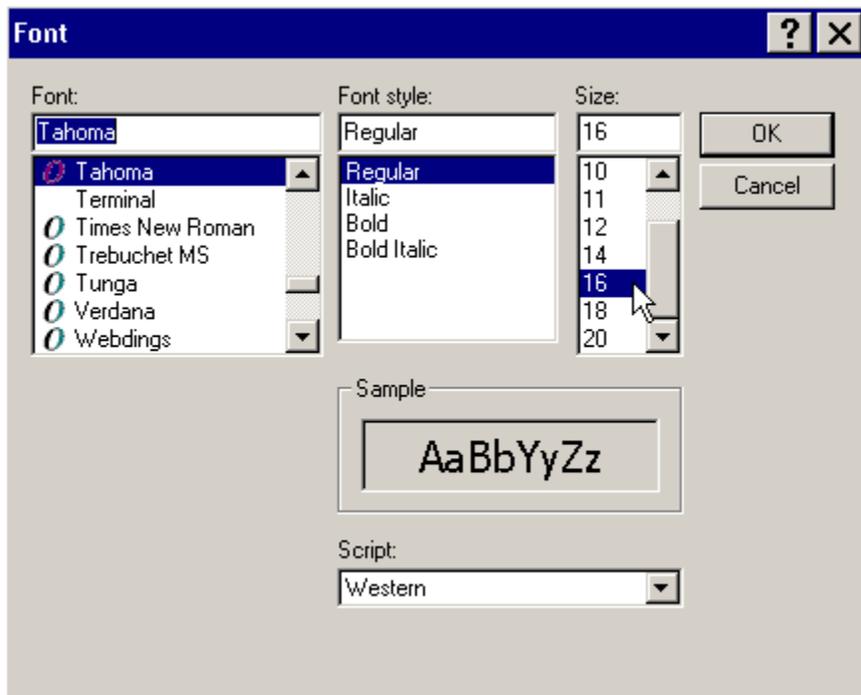
Changing Size of Assessment Questions

If the text on the assessment is too small to read, there is a way to enlarge the font size. With the assessment open, click Choose Font on the lower Toolbar.

The screenshot shows the SAMS application window titled 'Social Assistance Management System - [Assessment - Aardvark, Tracey A [8/6/2008]]'. The lower toolbar contains a 'Choose Font' button, which is currently selected. A 'Font Properties' dialog box is open over the toolbar. The main window displays an assessment form for 'Aardvark, Tracey A' dated 8/6/2008. The form is titled '0.A. INDIVIDUAL IDENTIFICATION' and contains the following questions and answers:

Question	Answer
0. ILA is being completed for which (DAIL) program?	
1. Date of assessment?	08/06/2008
2. Unique ID# for client.	605474321
3.a. Client's last name?	Aardvark
3.b. Client's first name?	Tracey
3.c. Client's middle initial?	A
6. Client's Pension/Social Security Number?	987-65-4321
7. Client's date of birth?	06/05/1947
8. age of the client in years.	61
calculated age at assessment	61.1718001368925
9. Client's gender?	F. Female
10a. Enter the client's mailing street address or Post Office box.	123 Main
10b. Enter the client's mailing city or town.	South Burlington
10c. Enter the client's mailing state.	VT
10d. Enter the client's mailing ZIP code.	05403
11.a. residential street address or Post Office box.	123 Main
11.b. residential city or town.	South Burlington
11.c. Client's state of residence.	VT

The following box will appear. Choose the font and font size you wish to see and click OK.



As you can see, the text in the assessment is much more readable after changing the font size.

Entering Text Question Answers

If the question requires a text answer (such as "Client's last name?", simply type in the answer. See below:

Question	Answer
0. ILA is being completed for which (DAIL) program?	
1. Date of assessment?	07/25/2007
2. Unique ID# for client.	605474321
3.a. Client's last name?	Aardvark
3.b. Client's first name?	Tracey
3.c. Client's middle initial?	A
6. Client's Pension/Social Security Number?	987-65-4321
7. Client's date of birth?	06/05/1947
8. age of the client in years.	60
calculated age at assessment	60.1368925393566
9. Client's gender?	F. Female
10a. Enter the client's mailing street address or Post Office box.	123 Main
10b. Enter the client's mailing city or town.	South Burlington
10c. Enter the client's mailing state.	VT
10d. Enter the client's mailing ZIP code.	05403
11.a. residential street address or Post Office box.	123 Main
11.b. residential city or town.	South Burlington
11.c. Client's state of residence.	VT
1. Intake	
1.A. ASSESSMENT INFORMATION	
1. Specify the type of assessment, or the reason for the assessment.	
9. ILA completed by?	Tracey Harrington
10. Agency the assessor works for?	
1.C.. DEMOGRAPHICS	
1. What is your marital status?	B. Married
2a. What is your race/ethnicity?	
G:Other. Enter the client's self-described ethnic background if OTHER	
2b. What is the client's ethnicity? Choose one.	C. Unknown
2c. What is the client's race? Choose multiple.	
3. Do you live in?	
4. Do you live:	

Entering Single Choice Question Answers

If the question is a single choice answer, click on the arrow box for that question and move the mouse to the choice you want and click. When on a single choice question, you can also use the left and right arrow keys to move through the choices for that question.

If the choice has a letter or number designation in front of it you can simply type in that letter or number to get the answer.

As you become familiar with the form this is the fastest way to enter data. For example, all "Yes" answers have a letter designation of "A" and all "No" answers have a letter designation of "B". So, if you know the answer is Yes, enter "A" on your keyboard and Yes will be entered for that question. See below for example of single choice question.

Social Assistance Management System - [Assessment - Aardvark, Tracey A [7/25/2007]]

File Edit View Assessment Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Tracey A - Consumer Assessment - Aardvark, Tracey A [7/25/2007]

Edit Save Save and Close Print History Notes Properties

Previous Next Find Question Go to Narrative Refresh

Assessment - Aardvark, Tracey A [7/25/2007]

VT DAIL AD Intake

- 0. Cover Sheet
 - A. INDIVIDUAL IDENTIFICATION
 - 1. Intake
 - 4. Emotional/Behavior/Cognitive Status
 - 5. Health Assessment
 - 6. Functional Assessment
 - Narrative

0. Cover Sheet	
0.A. INDIVIDUAL IDENTIFICATION	
? 0. ILA is being completed for which (DAIL) program?	
? 1. Date of assessment?	07/25/2007
? 2. Unique ID# for client.	605474321
? 3.a. Client's last name?	Aardvark
? 3.b. Client's first name?	Tracey
? 3.c. Client's middle initial?	A
? 6. Client's Pension/Social Security Number?	987-65-4321
? 7. Client's date of birth?	06/05/1947
? 8. age of the client in years.	60
? calculated age at assessment	60.1368925393566
? 9. Client's gender?	F. Female
? 10a. Enter the client's mailing street address or Post Office box.	
? 10b. Enter the client's mailing city or town.	M. Male
? 10c. Enter the client's mailing state.	F. Female
? 10d. Enter the client's mailing ZIP code.	05403
? 11.a. residential street address or Post Office box.	123 Main
? 11.b. residential city or town.	South Burlington
? 11.c. Client's state of residence.	VT
1. Intake	
1.A. ASSESSMENT INFORMATION	
? 1. Specify the type of assessment, or the reason for the assessment.	
? 9. ILA completed by?	Tracey Harrington
? 10. Agency the assessor works for?	
1.C.. DEMOGRAPHICS	
? 1. What is your marital status?	B. Married
? 2a. What is your race/ethnicity?	
? G:Other. Enter the client's self-described ethnic background if OTHER	
? 2b. What is the client's ethnicity? Choose one.	C. Unknown
? 2c. What is the client's race? Choose multiple.	
? 3. Do you live in?	
? 4. Do you live:	

1 Item, 1 Selected

TRACEYH SAMS2K_VT_DAIL 7/25/2007 1:23 PM

Entering Multiple Choice Question Answers

Multiple choice answers will have “...” in a box at the end of the highlighted question line. When you click this box, or simply press the space bar, the choice list will appear. See below for an example.

The screenshot shows the SAMS software interface for an assessment. The title bar reads "Social Assistance Management System - [Assessment - Aardvark, Tracey A [7/25/2007]]". The menu bar includes File, Edit, View, Assessment, Tools, Window, and Help. The toolbar contains icons for Consumers, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, and Payments. The main window title is "Assessment - Aardvark, Tracey A [7/25/2007]".

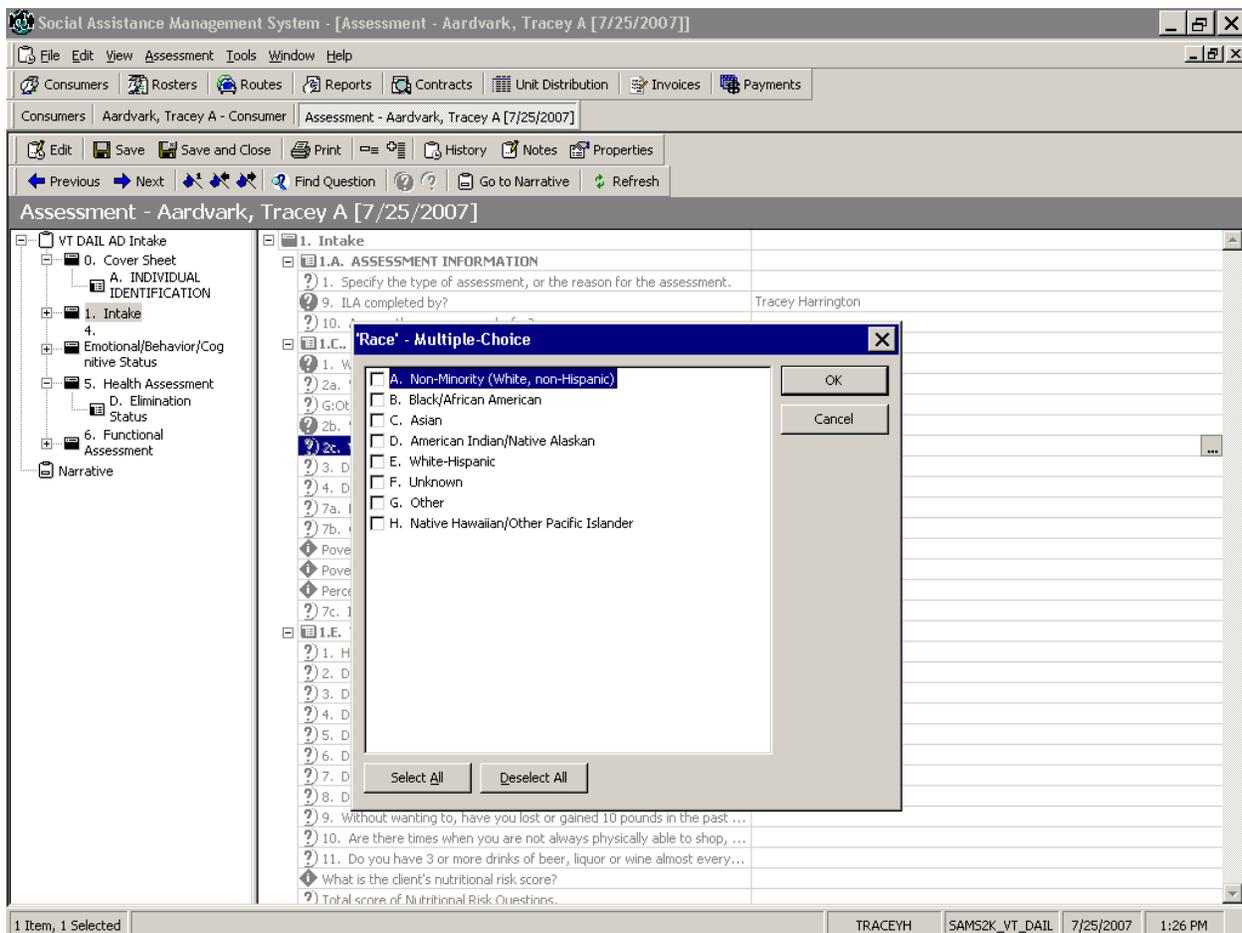
On the left is a tree view showing the assessment structure: VT DAIL AD Intake, 0. Cover Sheet, A. INDIVIDUAL IDENTIFICATION, 1. Intake (selected), 4. Emotional/Behavior/Cognitive Status, 5. Health Assessment, D. Elimination Status, 6. Functional Assessment, and Narrative.

The main area displays the "1. Intake" section, which is further divided into "1.A. ASSESSMENT INFORMATION" and "1.E. THE NSI DETERMINE Your Nutritional Health Checklist".

Under "1.A. ASSESSMENT INFORMATION", question 2c is highlighted: "2c. What is the client's race? Choose multiple." The answer field shows "C. Unknown" and a dropdown menu icon "...". A tooltip box is visible over the dropdown icon, containing the text "2c. What is the client's race? Choose multiple." Other questions in this section include 1, 9, 10, 2a, G:Other, 2b, 3, 4, 7a, 7b, and 7c.

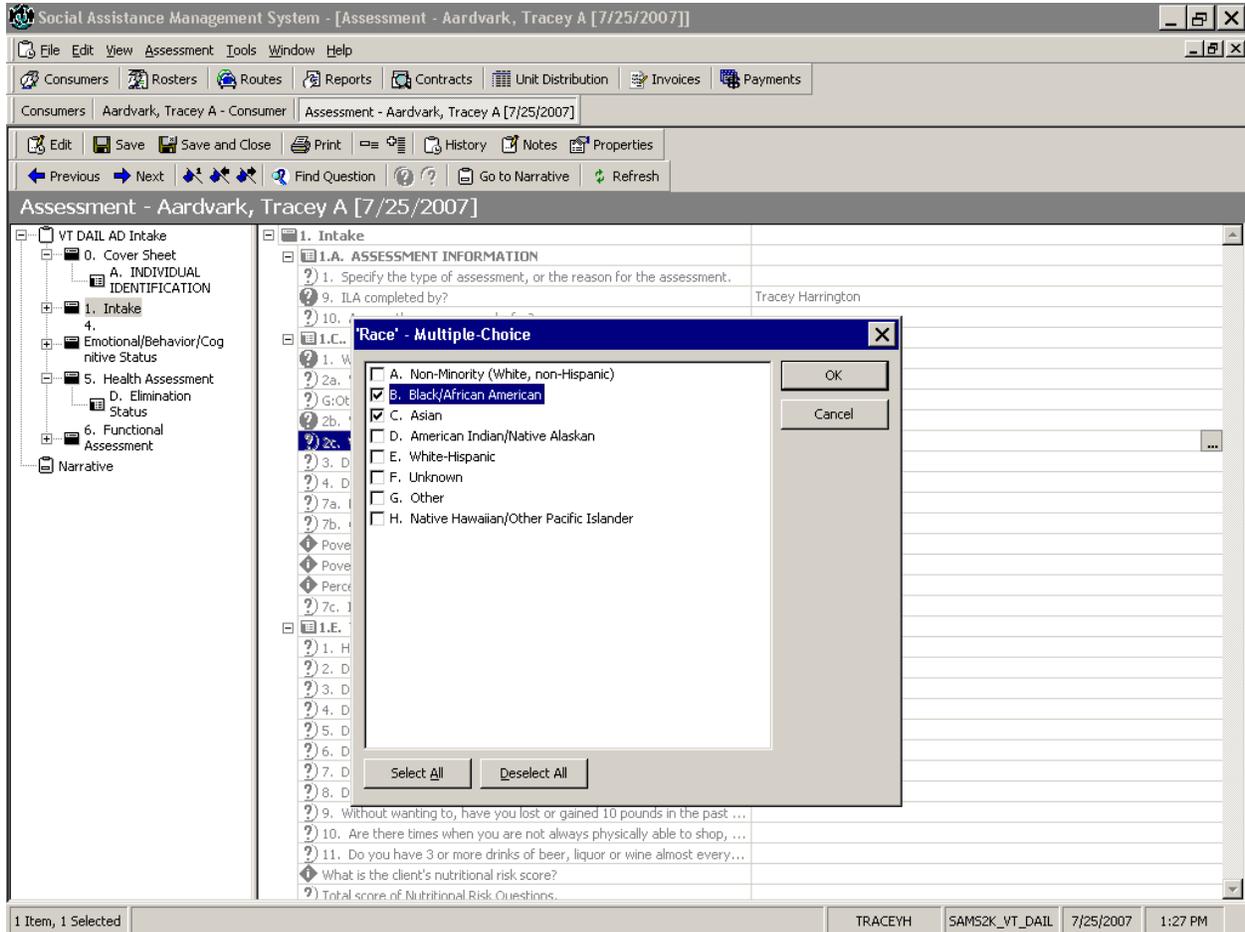
Under "1.E. THE NSI DETERMINE Your Nutritional Health Checklist", questions 1 through 11 are listed, along with a field for "What is the client's nutritional risk score?" and a "Total score of Nutritional Risk Questions." field.

The status bar at the bottom shows "1 Item, 1 Selected", "TRACEYH", "SAMS2K_VT_DAIL", "7/25/2007", and "1:25 PM".



To enter a choice, use the down (or up) arrow key to move to the choice you want and hit the space bar to check the choice. You can also use your mouse and check off the desired choices.

Choose as many choices as are applicable and click OK when finished. See below:



After making your choices and clicking OK, the choices are saved and you will see the number of responses you chose for that question. See below:

The screenshot displays the Social Assistance Management System (SAMS) interface for an assessment of Tracey A. Harrington on 7/25/2007. The interface is divided into several sections:

- Menu Bar:** File, Edit, View, Assessment, Tools, Window, Help.
- Toolbar:** Consumers, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, Payments.
- Navigation Bar:** Edit, Save, Save and Close, Print, History, Notes, Properties, Previous, Next, Find Question, Go to Narrative, Refresh.
- Tree View (Left):**
 - VT DAIL AD Intake
 - 0. Cover Sheet
 - A. INDIVIDUAL IDENTIFICATION
 - 1. Intake (Selected)
 - 4. Emotional/Behavior/Cognitive Status
 - 5. Health Assessment
 - D. Elimination Status
 - 6. Functional Assessment
 - Narrative
- Main Content Area (Right):**
 - 1. Intake**
 - 1.A. ASSESSMENT INFORMATION**
 - 1. Specify the type of assessment, or the reason for the assessment.
 - 9. ILA completed by? Tracey Harrington
 - 10. Agency the assessor works for?
 - 1.C. DEMOGRAPHICS**
 - 1. What is your marital status? B. Married
 - 2a. What is your race/ethnicity?
 - G:Other. Enter the client's self-described ethnic background if OTHER
 - 2b. What is the client's ethnicity? Choose one. C. Unknown
 - 2c. What is the client's race? Choose multiple. (2 Responses)**
 - 3. Do you live in?
 - 4. Do you live:
 - 7a. HOUSEHOLD INCOME: What is the total income of the client's HO...
 - 7b. CLIENTS INCOME: Specify the client's monthly income.
 - Poverty Income Test current yr household
 - Poverty Income test current yr Client only 850.83
 - Percent of poverty for client current year (if less than 1.0 client is in p...
 - 7c. Is the client's income level below the national poverty level? (Use ...
 - 1.E. THE NSI DETERMINE Your Nutritional Health Checklist**
 - 1. Have you made any changes in lifelong eating habits because of he...
 - 2. Do you eat fewer than 2 meals per day?
 - 3. Do you eat fewer than five (5) servings (1/2 cup each) of fruits or ...
 - 4. Do you eat fewer than two servings of dairy products (such as milk...
 - 5. Do you have trouble eating due to problems with chewing/swallowi...
 - 6. Do you sometimes not have enough money to buy food?
 - 7. Do you eat alone most of the time?
 - 8. Do you take 3 or more different prescribed or over-the-counter dru...
 - 9. Without wanting to, have you lost or gained 10 pounds in the past ...
 - 10. Are there times when you are not always physically able to shop, ...
 - 11. Do you have 3 or more drinks of beer, liquor or wine almost every...
 - What is the client's nutritional risk score?
 - Total score of Nutritional Risk Questions.

Using Notes

You can write notes for any and all questions. If you want to write a note, click on the Notes button and a note section will appear below the question list. That note will be tied to the highlighted question. Notes can be toggled on or off by clicking the Notes button. If notes are showing and you do not want them to show, click on Notes and they will toggle off. Conversely if the notes are not showing and you would like to see them, click on the Notes button. See screen below:

The screenshot shows the SAMS application window with the following components:

- Menu Bar:** File, Edit, View, Assessment, Tools, Window, Help
- Navigation Bar:** Consumers, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, Payments
- Current View:** Assessment - Aardvark, Tracey A [7/25/2007]
- Left Panel (Tree View):**
 - VT DAIL AD Intake
 - 0. Cover Sheet
 - A. INDIVIDUAL IDENTIFICATION (Expanded)
 - 1. Intake
 - 4. Emotional/Behavior/Cognitive Status
 - 5. Health Assessment
 - 6. Functional Assessment
 - Narrative

- Main Content Area:**

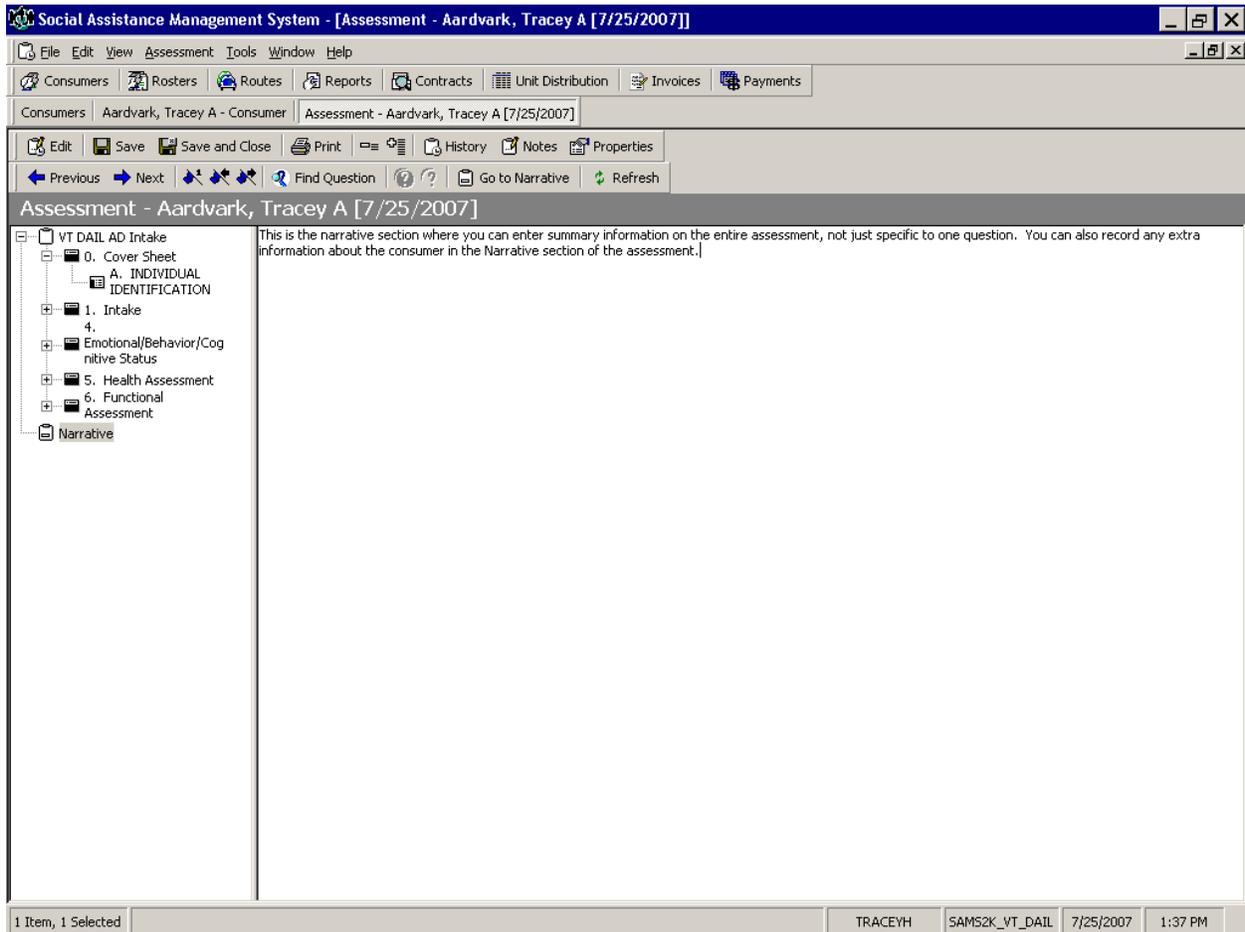
O.A. INDIVIDUAL IDENTIFICATION

0. ILA is being completed for which (DAIL) program?	
1. Date of assessment?	07/25/2007
2. Unique ID# for client.	605474321
3.a. Client's last name?	Aardvark
3.b. Client's first name?	Tracey
3.c. Client's middle initial?	A
6. Client's Pension/Social Security Number?	987-65-4321
7. Client's date of birth?	06/05/1947
8. age of the client in years.	60
calculated age at assessment	60.1368925393566
9. Client's gender?	F. Female
10a. Enter the client's mailing street address or Post Office box.	123 Main
10b. Enter the client's mailing city or town.	South Burlington
10c. Enter the client's mailing state.	VT
10d. Enter the client's mailing ZIP code.	05403
11.a. residential street address or Post Office box.	123 Main
11.b. residential city or town.	South Burlington
11.c. Client's state of residence.	VT

This is where you can type a note for the highlighted question. A note on this question may be to indicate that the consumer receives mail at a relative's house.
- Status Bar:** 1 Item, 1 Selected | TRACEYH | SAMS2K_VT_DAIL | 7/25/2007 | 1:35 PM

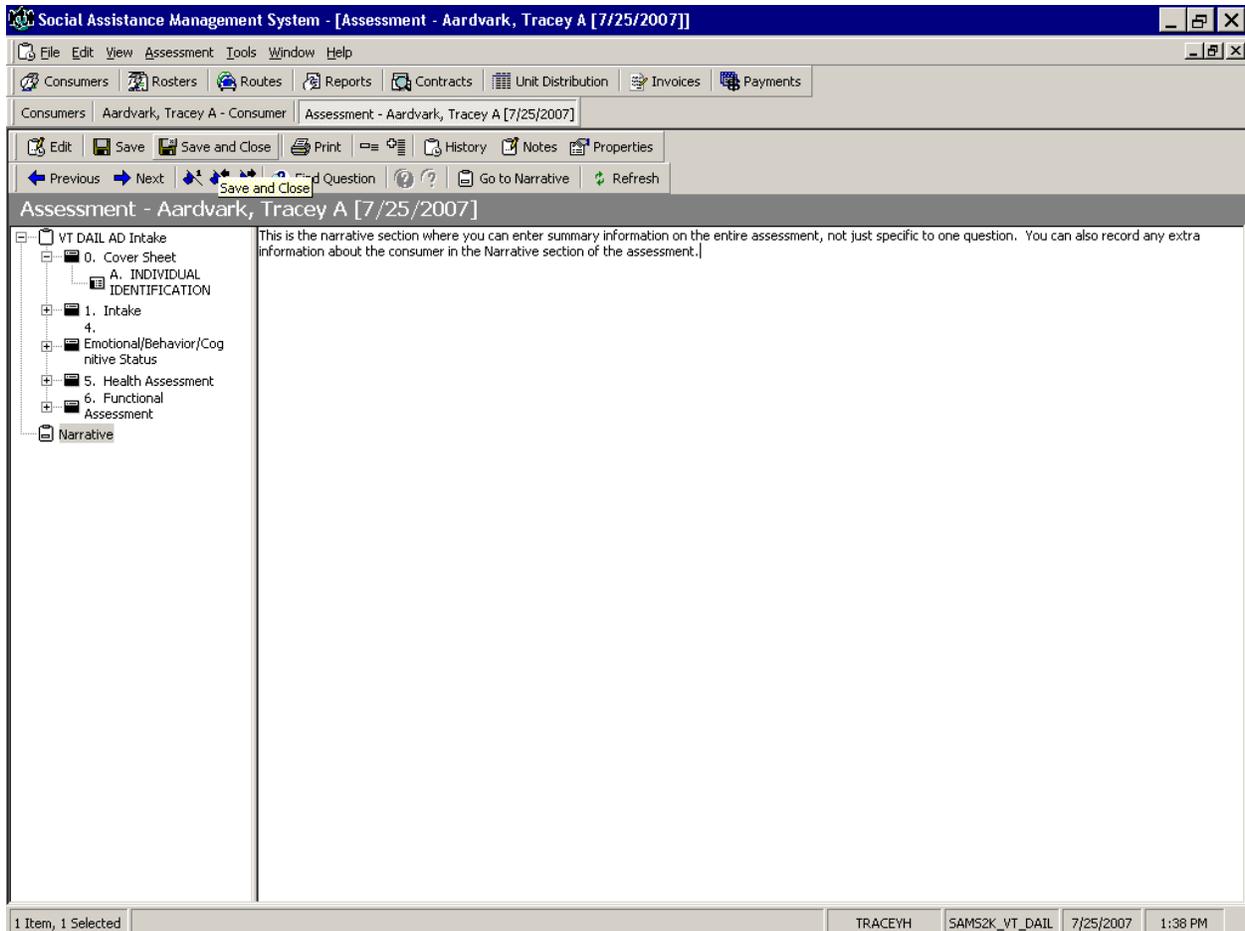
Using Narrative

You can write a running narrative on the whole assessment for the consumer. The last section of the assessment form is a narrative section. If you would like to write a narrative, click on the “Go to Narrative” button and a narrative section will appear in the question area. When you would like to leave the narrative section, simply click on another section (left hand column) that you want to go to. See example below:

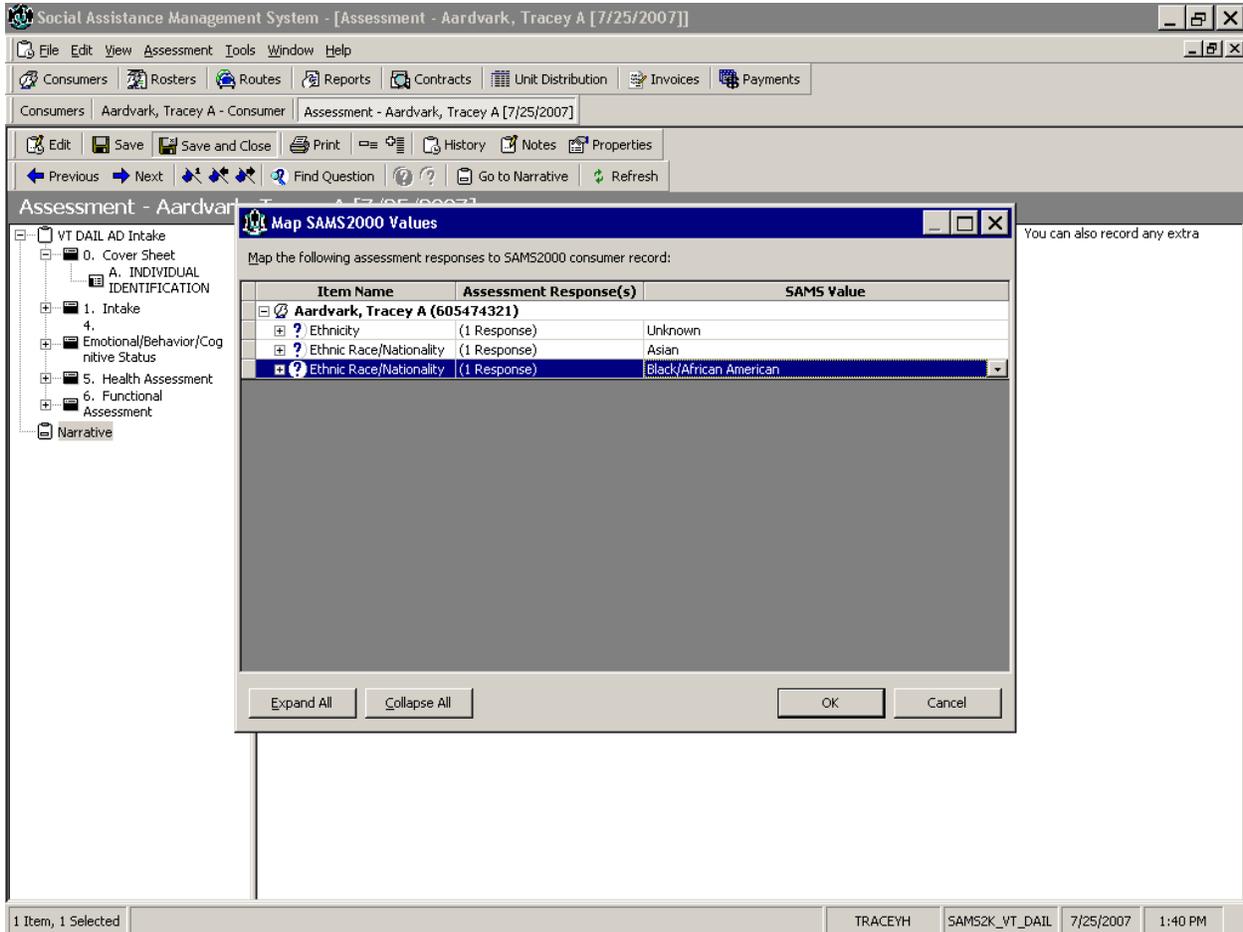


Saving the Assessment

If you want to save and keep working on the assessment you can click on Save anytime and the form will stay open. When you want to save and exit the interview, click on Save and Close and the assessment will be saved and the form will be closed taking you back to the previous screen. See below:



After clicking Save and Close you will be at this screen. See below:



This screen is simply matching the information contained within the assessment to the information in the SAMS database. Use the '+' signs to the left to see which information is in each. The data should be equal. Once done, click OK.

You will then be brought to this screen:

The screenshot shows the 'Social Assistance Management System - [Aardvark, Tracey A - Consumer]' window. The main content area is titled 'Aardvark, Tracey A - Assessments' and contains a table with the following data:

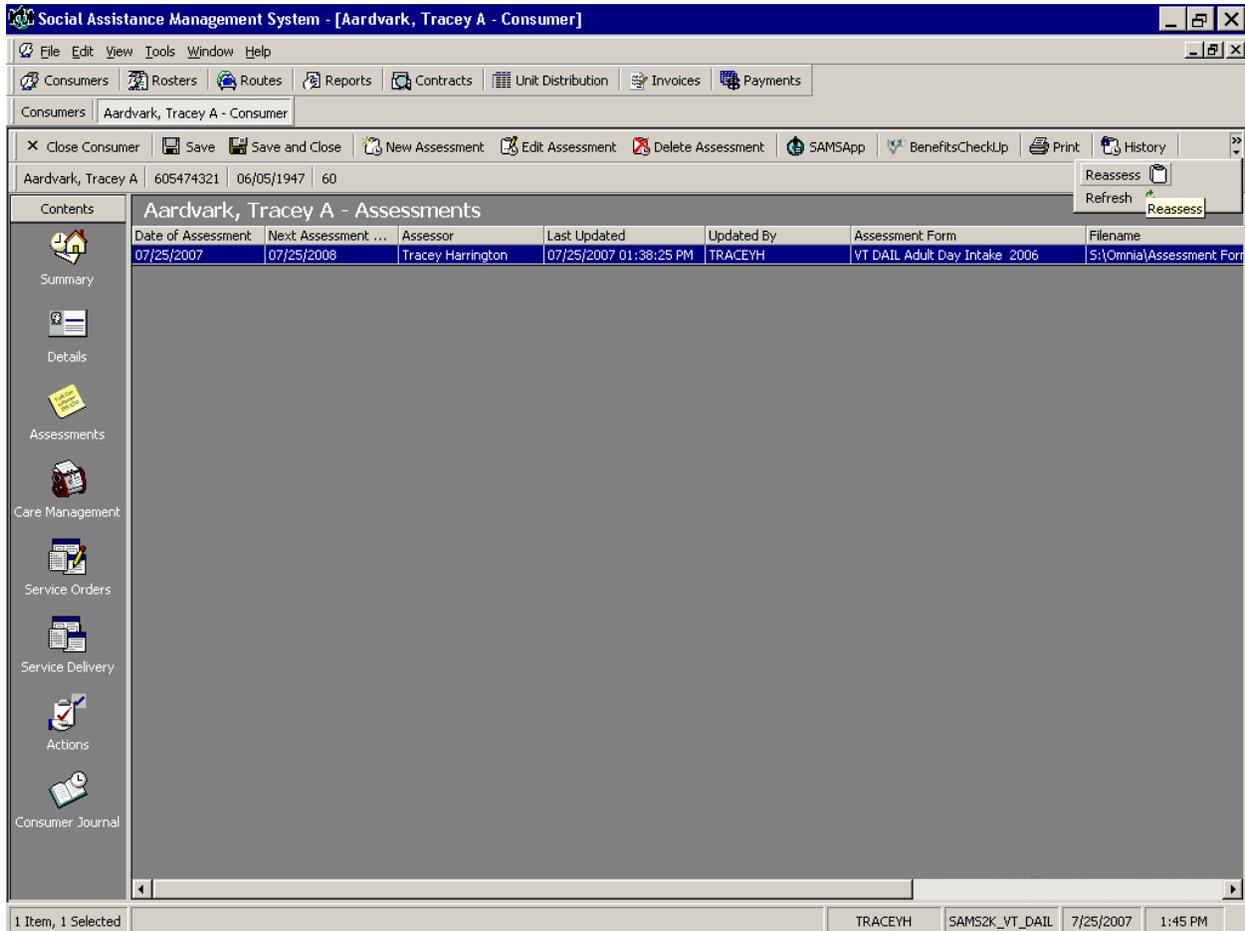
Date of Assessment	Next Assessment ...	Assessor	Last Updated	Updated By	Assessment Form	Filename
07/25/2007	07/25/2008	Tracey Harrington	07/25/2007 01:38:25 PM	TRACEYH	VT DAIL Adult Day Intake 2006	S:\Omnia\Assessment Form

The interface also features a left-hand navigation pane with icons for Summary, Details, Assessments, Care Management, Service Orders, Service Delivery, Actions, and Consumer Journal. At the bottom, a status bar indicates '1 Item, 1 Selected' and provides details for the selected item: TRACEYH, SAMS2K_VT_DAIL, 7/25/2007, 1:42 PM.

If you are finished with the assessment, you should save and close this screen also.

Reassessments

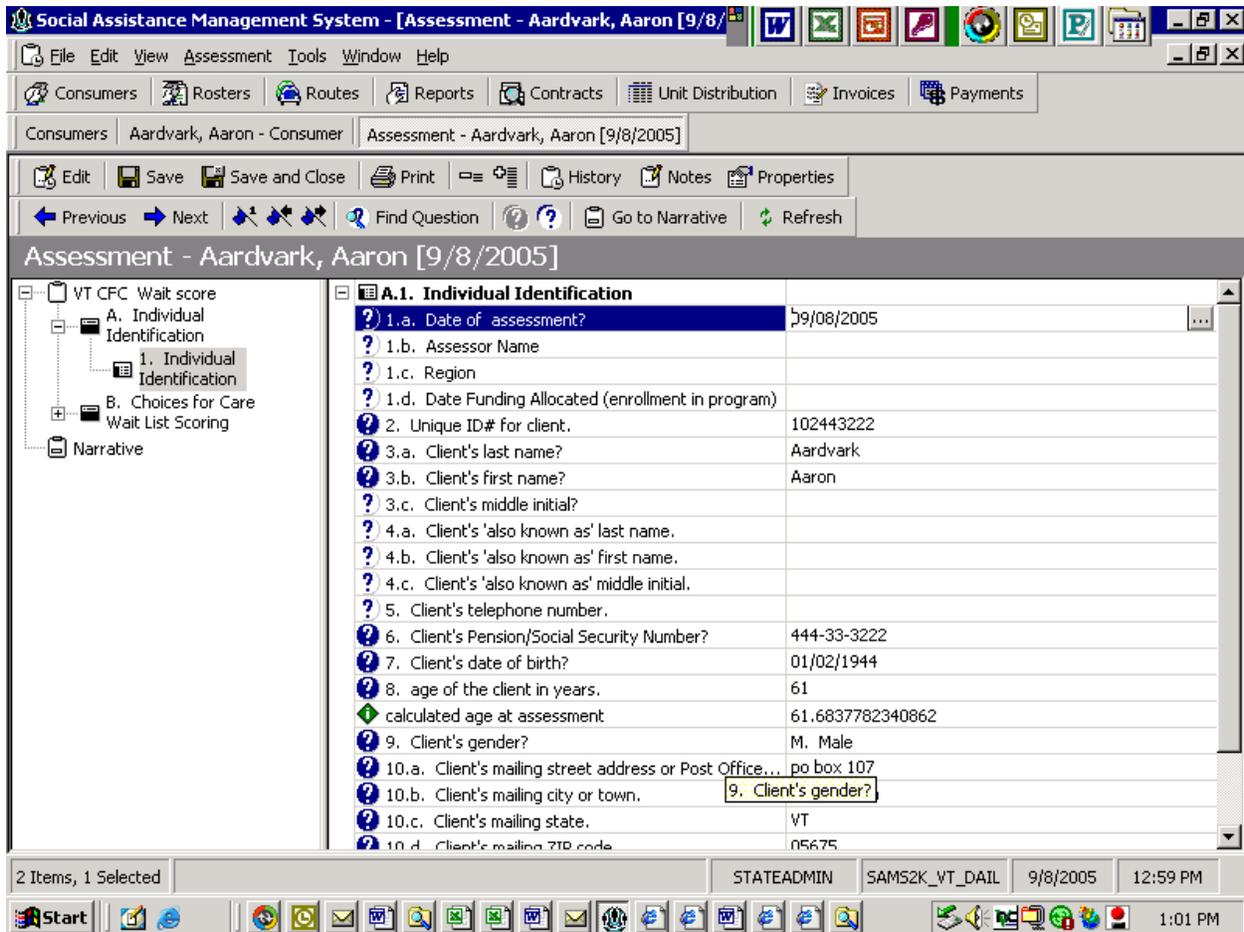
Reassessments work the same as a regular assessment does. However, instead of click “New Assessment”, click “Reassess” as seen below.



When asked for the assessment form, chose the form you are using to reassess with. You will then follow the steps outlined in this section for adding an assessment. All responses that were given to question in the previous form will be carried over. All that needs to be done is to alter the information that has changed since the last assessment.

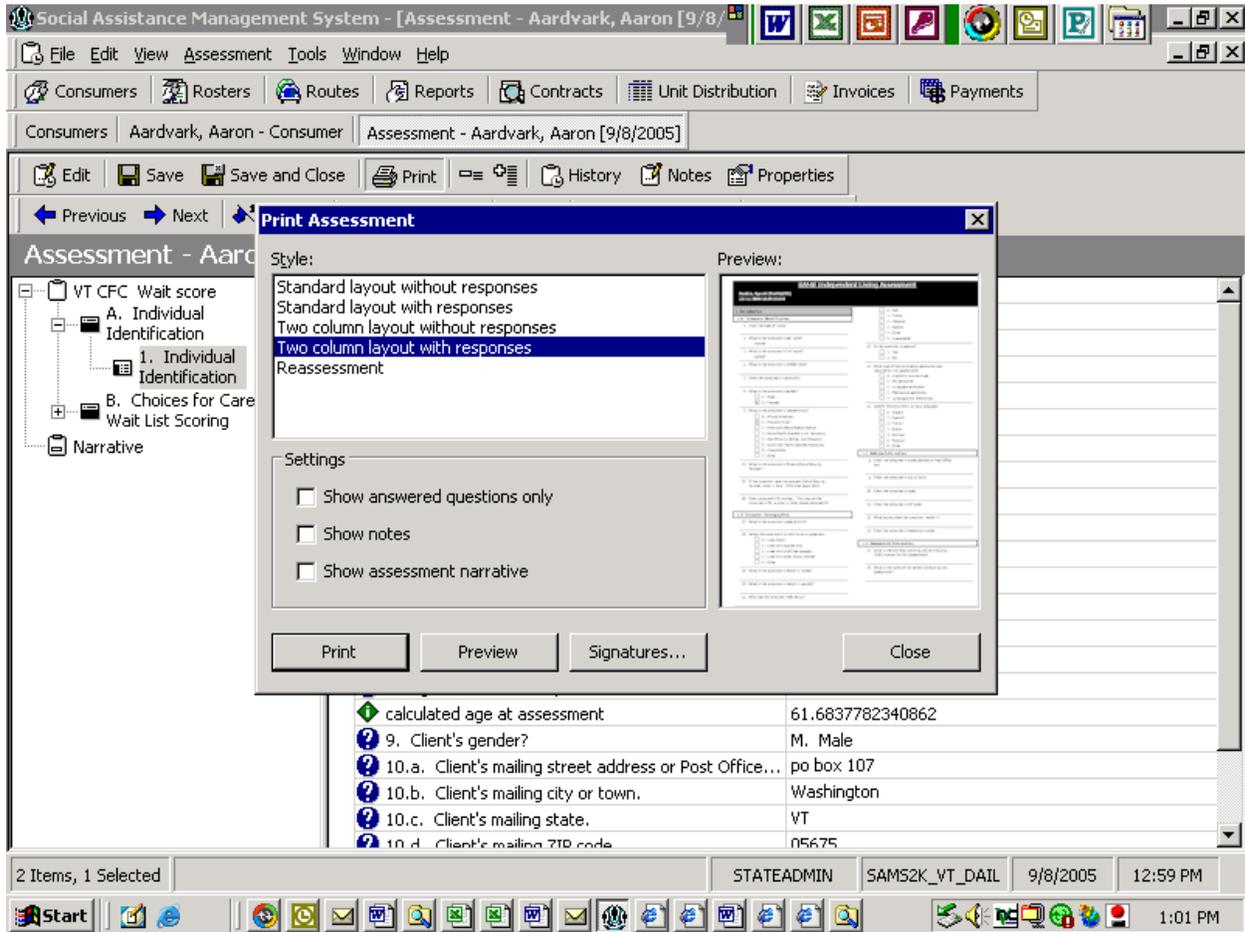
Printing an Assessment

To print an assessment click on print.

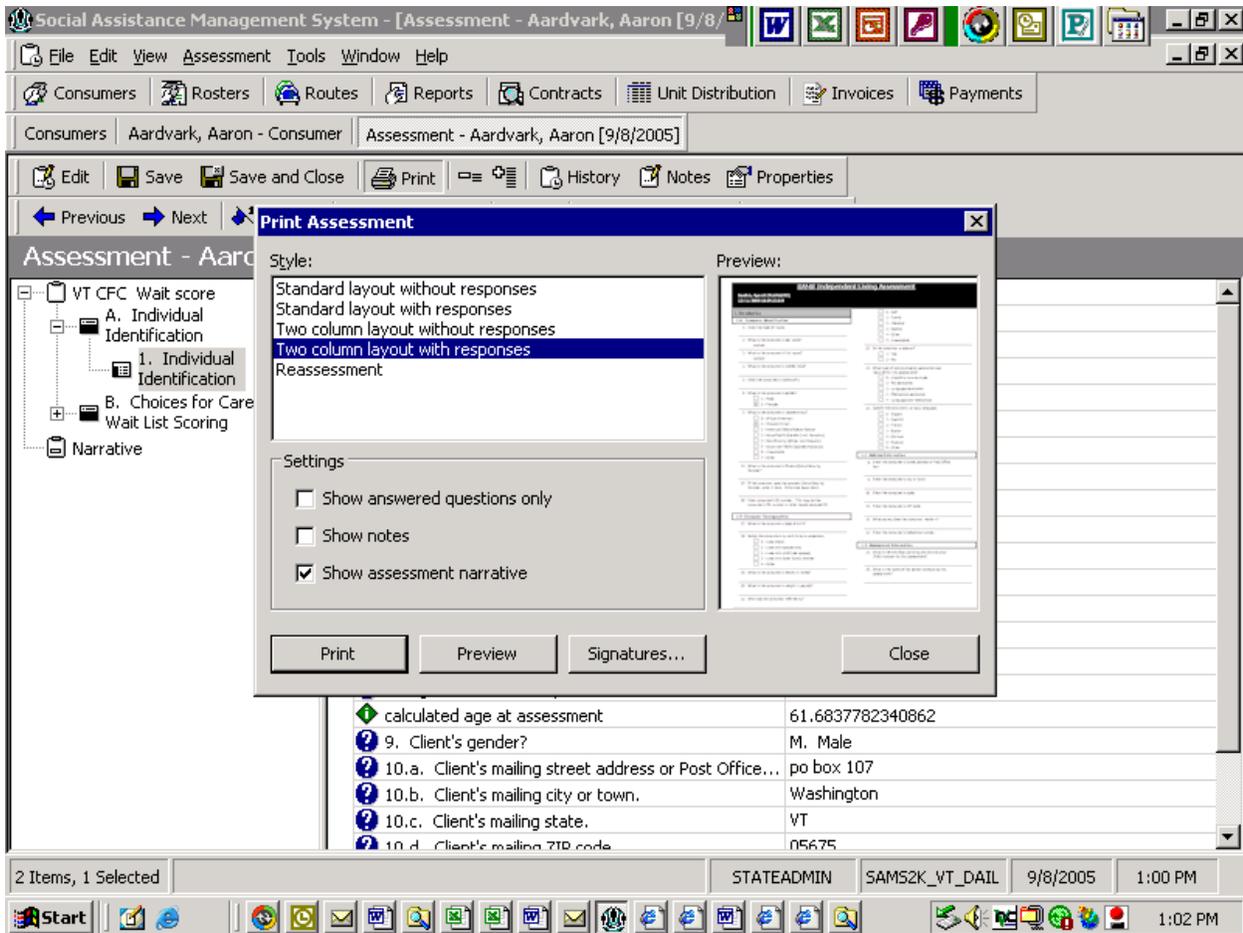


Printing Layout Options

You will see the screen below to choose your layout options

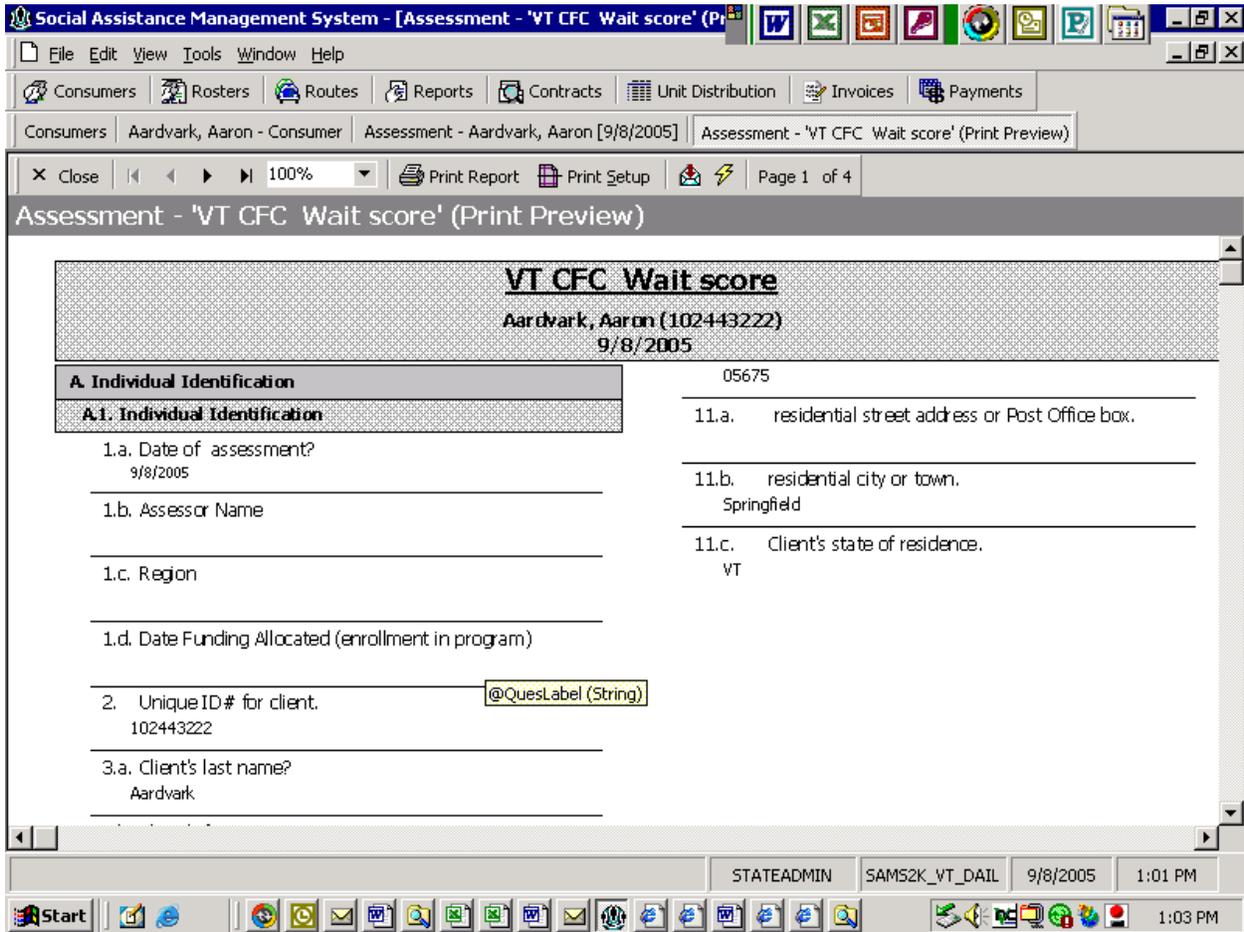


You should click on the two-column layout with responses. You can then choose to print notes you have made and or print the narrative on the consumer by clicking in the appropriate box. If you are printing a copy for the consumer you may not want to print notes and narrative. After choosing what you want to print you should click preview.



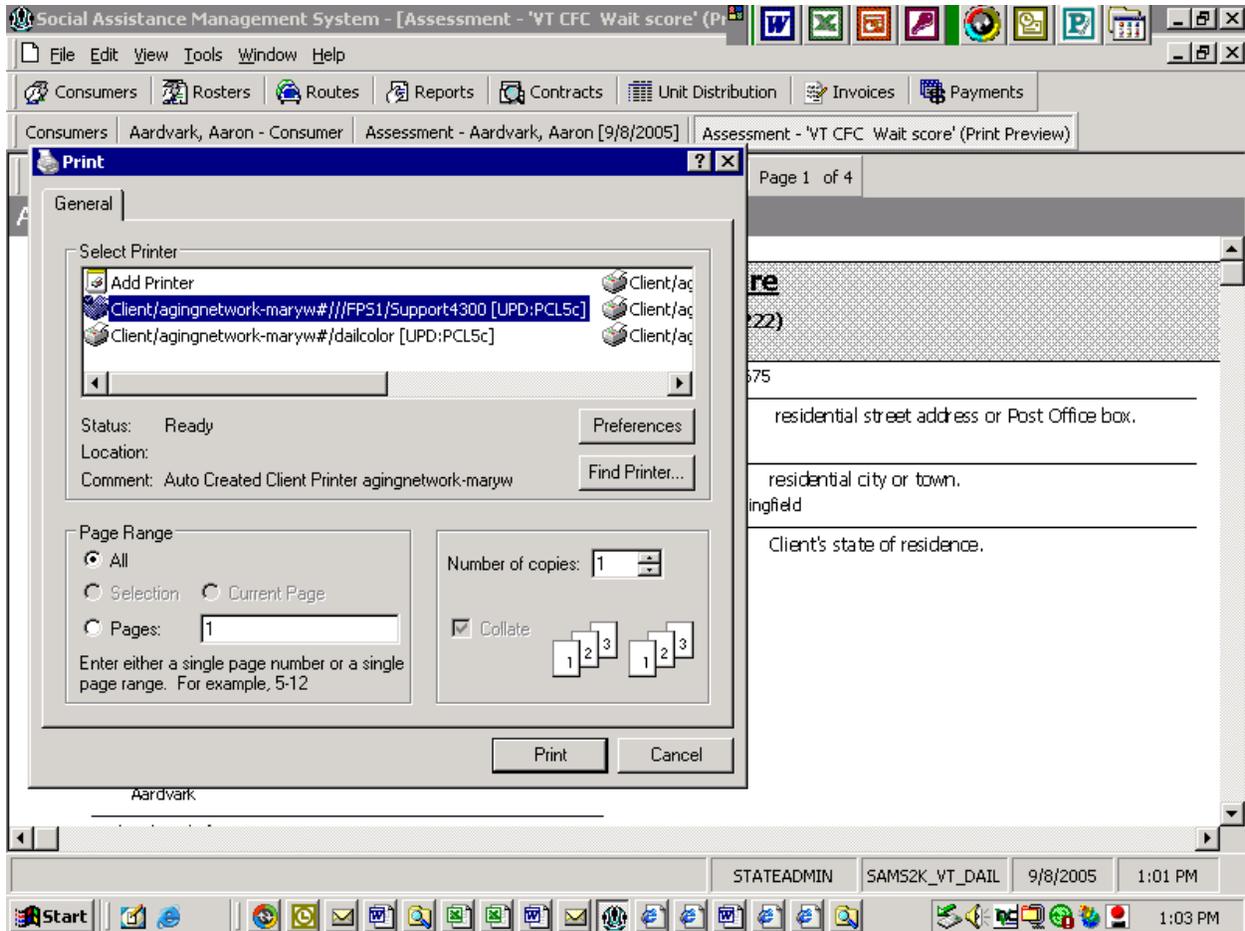
Print Preview

Click Preview and the below print preview screen will appear.



Printing

When you want to print click the Print Report button. Then you will see Print box and here you can print all pages or select one page or a range of pages to print and you can print multiple copies. If you have multiple printers you can select a printer. Then click on OK and your form will print.



Export an Assessment (Save as File)

To export, or save the report as a file, you can click on the envelope icon when you are in preview mode.

Social Assistance Management System - [Assessment - 'VT CFC Wait score' (P

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Aaron - Consumer Assessment - Aardvark, Aaron [9/8/2005] Assessment - 'VT CFC Wait score' (Print Preview)

Close 100% Print Report Print Setup Page 1 of 4

Assessment - 'VT CFC Wait score' (Print Preview) **Export Report**

VT CFC Wait score
Aardvark, Aaron (102443222)
9/8/2005

A. Individual Identification 05675

A.1. Individual Identification

1.a. Date of assessment?
9/8/2005

1.b. Assessor Name

1.c. Region

1.d. Date Funding Allocated (enrollment in program)

2. Unique ID# for client.
102443222

3.a. Client's last name?
Aardvark

11.a. residential street address or Post Office box.

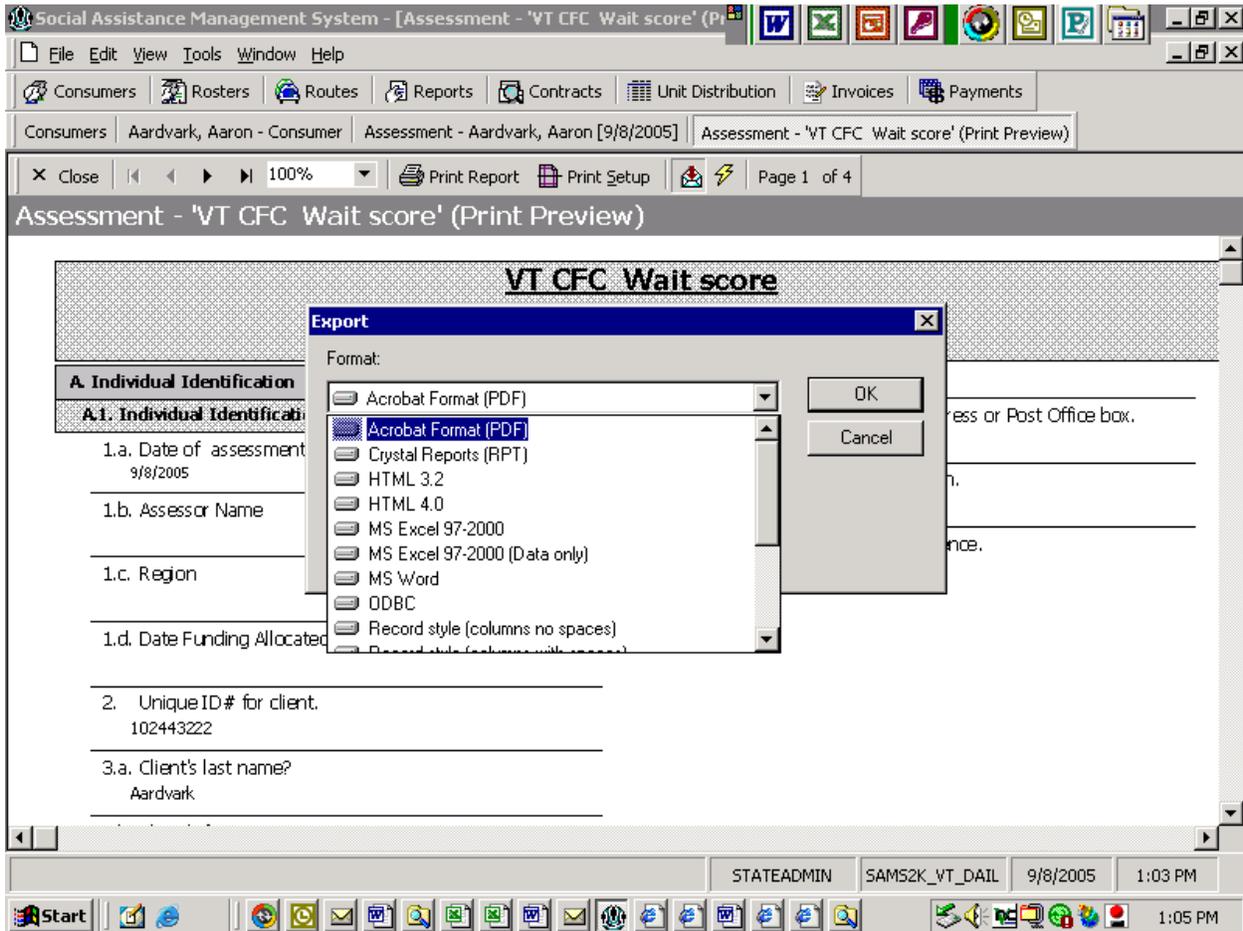
11.b. residential city or town.
Springfield

11.c. Client's state of residence.
VT

STATEADMIN SAMS2K_VT_DAIL 9/8/2005 1:03 PM

Start 1:05 PM

When you click on the envelope icon you will see an export box, which allows you to choose a format. The PDF format is the most readable but can also choose a WORD format among others.



When you have chosen your format you will see a page range option where you may choose to export all pages or any range of pages. Click Ok when you have chosen

The screenshot shows a software interface with an 'Export Options' dialog box in the foreground and a 'Print Preview' window in the background.

Export Options Dialog:

- Page Range:
 - All
 - Page Range: From: To:
- Buttons: OK, Cancel

Print Preview Window:

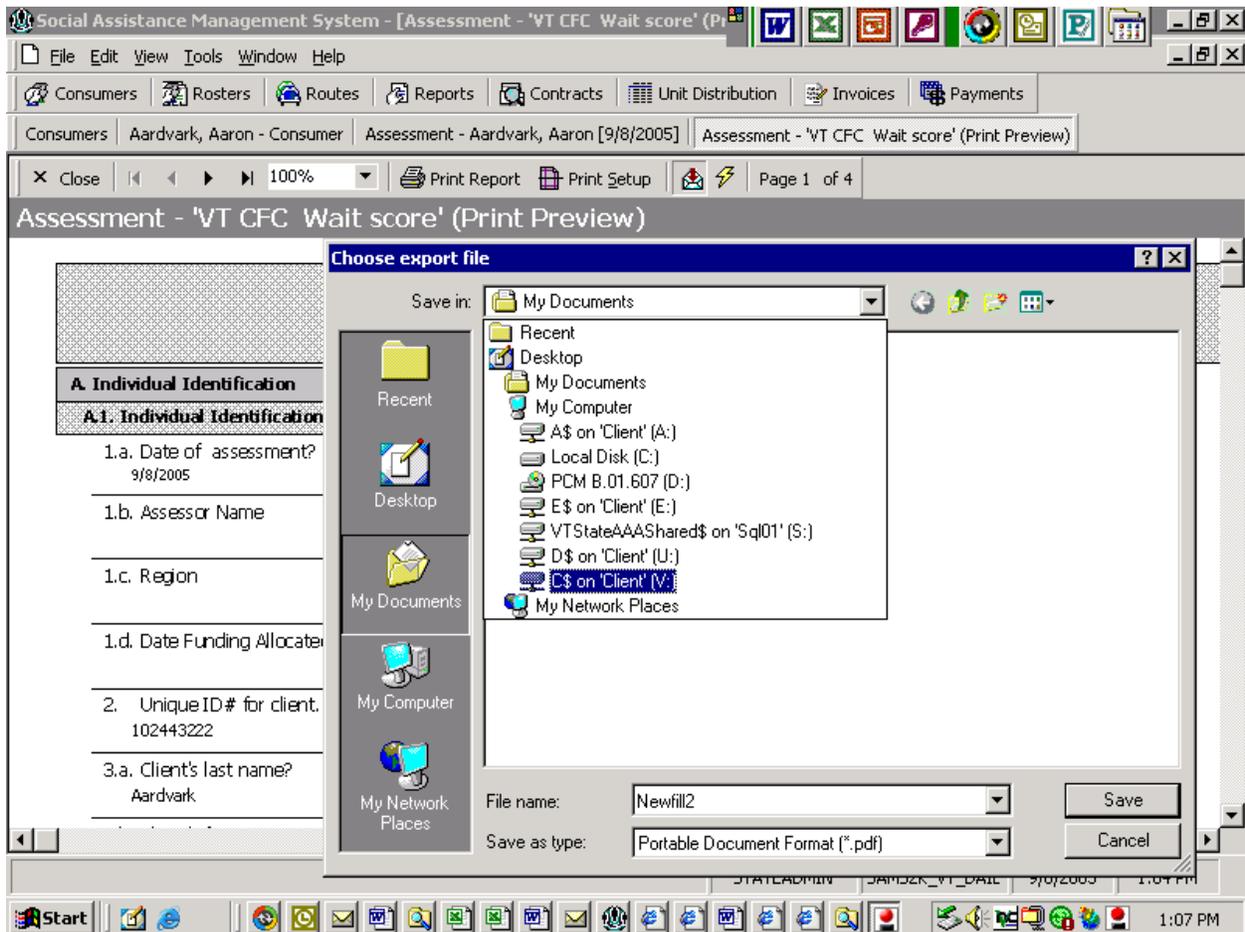
nt - 'VT CFC Wait score' (P...
 Contracts Unit Distribution Invoices Payments
 Aardvark, Aaron [9/8/2005] Assessment - 'VT CFC Wait score' (Print Preview)
 Print Setup Page 1 of 4
 (Print Preview)

VT CFC Wait score
 Aardvark, Aaron (102443222)
 9/8/2005

A. Individual Identification	05675
A.1. Individual Identification	
1.a. Date of assessment? 9/8/2005	11.a. residential street address or Post Office box.
1.b. Assessor Name	11.b. residential city or town. Springfield
1.c. Region	11.c. Client's state of residence. VT
1.d. Date Funding Allocated (enrollment in program)	
2. UniqueID# for client. 102443222	
3.a. Client's last name? Aardvark	

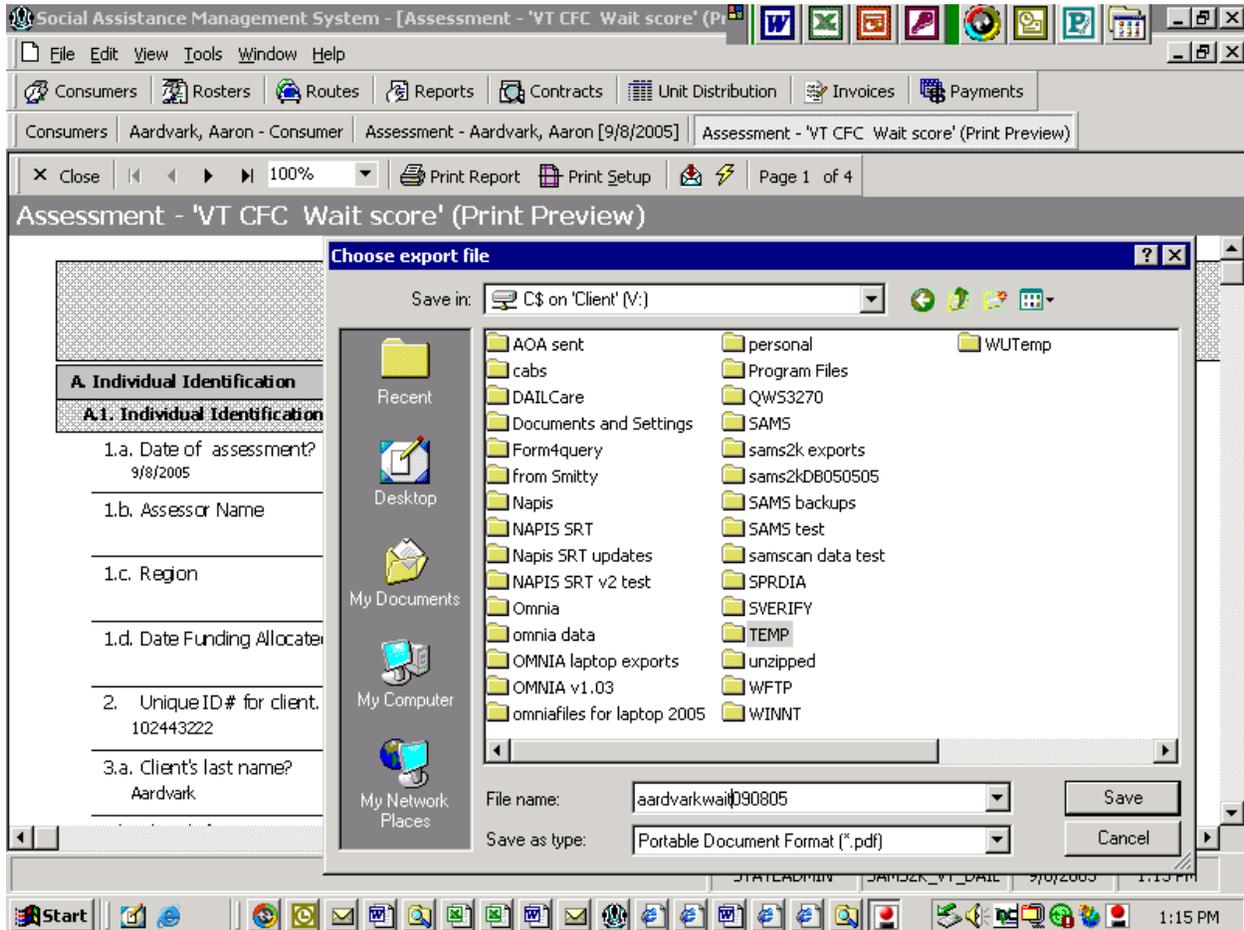
STATEADMIN SAMS2K_VT_DAIL 9/8/2005 1:04 PM
 Start 1:06 PM

Then you will see a screen that asks what you want to name the file and where do you want to save it.



First choose where to save it by clicking in the save in arrow. You can save it on c\$ on client V as above. This will save the file to your C: drive hard disk. You can also save it to a floppy disk in your A: drive (A: on client A: in the choices above)

If you save it on your c drive and choose C\$ on Client (V), which is what the network calls your C: drive. On your C drive you should choose the directory you want to save it to. The example below shows TEMP highlighted



Then you need to go to the file name and give the file a name such as consumer name, form name and date. The example above has named the file aardvarkwait090805

Then click save and the file will be saved. After that you can print the file from another program such as Word or Adobe Acrobat or you can send it electronically via fax or email attachment. For email attachments we require that the file is zipped and pass worded.

6. Activities & Referrals

The Activities & Referrals section can be used to send messages to other SAMS users, as well as to track waiting time history on the wait list. To perform either task, click on the Activities & Referrals button in the Contents column.

Social Assistance Management System - [Aardvark, Anabelle Y - Consumer]

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Anabelle Y - Consumer

Close Consumer Save Save and Close

Aardvark, Anabelle Y 104356789 01/04/1935 73 Not Specified Kara Artus

Contents
 Aardvark, Anabelle Y - Consumer Summary

Personal

Client ID	104356789
SSN	123-45-6789
Birth Date	01/04/1935
Age	73
Gender	Female
Marital Status	Married
AKA Name	Antie Aardvark
Language	English
Home Phone	(802) 555-5555
Info Release Authorized	Yes
Date Registered	08/01/2005
Consumer Details Last Reviewed	09/13/2005
Active	No
Reason	Unknown
Status Date	9/13/2005

Assessments

10/14/2005	VT DAIL CFC transitional service plan
10/20/2005	VT DAIL CFC Clinical Assessment
06/02/2006	Basic NAPIS Intake Assessment
06/07/2006	VT DAIL Full ILA 05
06/14/2006	VT Intake ILA 06
06/26/2006	VT DAIL HASS (and Homemaker)Intake 2006
06/26/2006	VT DAIL CFC Intake 2006
06/26/2006	VT DAIL Adult Day Intake 2006
09/08/2006	VT DAIL Full ILA 06
09/21/2006	VT DAIL Comprehensive resident assessment

NAPIS

Ethnicity	Not Hispanic or Latino
In Poverty	No
Lives Alone	Yes
High Nutritional Risk	Yes
Is Rural	Don't Know
Number of ADLs	4
Number of IADLs	8

Ethnic Races

Non-Minority (White, non-Hispanic)	American
------------------------------------	----------

Caregivers

Aardvark, April	Other Elderly Relative
-----------------	------------------------

Care Enrollment

Primary Care Manager	Kara Artus
Default Provider	Not Specified
Default Agency	Not Specified
Service Program	LTC Waiver HCB5 (Choices for Care)
Active Participation Dates	03/01/2006 - None
Status	Inactive
Service Program	LTC Waiver Nursing Home short term (VHAP-Me)
Active Participation Dates	04/01/2006 - None
Status	Inactive
Service Program	LTC Waiver PACE
Active Participation Dates	01/01/2006 - None
Status	Inactive
Service Program	LTC Waiver Nursing Home short-term

TRACEYH SAMS2K_VT_DAIL 2/12/2008 9:53 AM

start | Inbox - Micros... | MetaFrame Pr... | SAMS Docume... | Citrix ICA C... | CFC Full SAMS ... | 9:46 AM

Adding a Message

The resulting screen shows existing activities and referrals for a consumer. The example below shows three messages for Waterbury, a message for PACE, one for Barre and one message regarding a doctor's appointment.

The screenshot displays the 'Social Assistance Management System - [Aardvark, Anabelle Y - Consumer]' window. The main area is titled 'Aardvark, Anabelle Y - Activities & Referrals' and contains a table with the following data:

Complete?	Due Date	Date Com...	Subject	Action	Status	Create User	Agency	Provider
<input checked="" type="checkbox"/>		02/01/2006	HB-Wait	HB-Waiting	Completed	State-Administrator		
<input type="checkbox"/>			another test from Dick	Waterbury CFC messag...	Not Started	State Administrator		
<input type="checkbox"/>			URGENT to do test from Nancy	Waterbury CFC messag...	Not Started	State Administrator		
<input type="checkbox"/>			check on DOB for this client from Nancy	Barre LTCCC messages	Not Started	State Administrator		
<input type="checkbox"/>			test message from Joan H	PACE Burlington Messages	Not Started	Patty Gratton	PACE Center Bur...	
<input type="checkbox"/>			test of action message	Waterbury CFC messag...	Not Started	AAA Council on a...	Council on Aging ...	
<input type="checkbox"/>	02/20/2006		Dr. Jones	Doctor appointment	Not Started	State Administrator		

The interface includes a sidebar with navigation options: Summary, Details, Assessments, Care Management, Service Orders, Service Delivery, Activities & Refer..., and Consumer Journal. The bottom status bar shows '7 Items, 1 Selected' and system information including 'TRACEVH', 'SAMS2K_VT_DAIL', '2/12/2008', and '9:54 AM'.

Click on the Add Activity/Referral button near the center of the toolbar and the following screen will appear. In the Subject field, type a description for the message followed by the word 'from' and your name. The Action field is where the message should be directed. Click on the down arrow to see all the choices. If you know the name of the action (such as Waterbury CFC message) you can type in W and the first choice in the list starting with that letter will fill in. You can then use your right and left arrows to navigate through the list.

There are action items in the drop down list for each LTCCC district, Agency and for Waterbury. This identifies to whom you wish to send the message.

Social Assistance Management System - [Aardvark, Anabelle Y - Consumer]

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Anabelle Y - Consumer

Close Consumer Save Save and Close Add Activity/Referral Edit Activity/Referral Delete Activity/Referral Find Apply Apply And Close

Aardvark, Anabelle Y 104356789 01/04/1935 73 Not Specified Kara Artus Print Activity/Referral Print Preview Activity/Referral

Aardvark, Anabelle Y - Activities & Referrals

Complete?	Due Date	Date Com...	Subject	Action	Status	Create User	Agency	Provider
<input checked="" type="checkbox"/>		02/01/2008	HB Wait	HB Waiting	Completed	State Administrator		
<input type="checkbox"/>			another test from Dick	Waterbury CFC messag...	Not Started	State Administrator		
<input type="checkbox"/>			URGENT to do test from Nancy	Waterbury CFC messag...	Not Started	State Administrator		
<input type="checkbox"/>			check on DOB for this client from Nancy	Barre LTCCC messages	Not Started	State Administrator		

Action Details

Subject: []

Action: []

Agency: []

Provider: []

Subprovider: []

Services: []

Care Program: []

Site: []

Status: Not Started

Reason: []

Status Date: 02/11/2008

Comments: []

February 2008

Sun	Mon	Tues	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	26	27	28	29	

7 Items, 1 Selected

TRACEYH SAMS2K_VT_DAIL 2/12/2008 9:57 AM

The screen below shows the drop down list for Actions. Barre LTCCC is highlighted, meaning the message is intended for the LTCCC in the Barre district office. The Status Date will auto fill with today's date. Choose the applicable Status and click Save on the left of the toolbar to save the message.

The screenshot displays the SAMS interface for a consumer named Anabelle Y. The main window shows a list of activities under 'Aardvark, Anabelle Y - Activities & Referrals'. The first activity is 'HB-Wait' with a status of 'Completed'. Below this, there is a detailed view of an activity with the subject 'Emergency hospital admission from Nancy'. The 'Action' dropdown menu is open, showing several options, with 'Barre LTCCC messages' highlighted. To the right of the details is a calendar for February 2008, with the 12th of February selected. The bottom of the screen shows the Windows taskbar with various open applications and the system clock at 9:52 AM on 2/12/2008.

Complete?	Due Date	Date Com...	Subject	Action	Status	Create User	Agency	Provider
<input checked="" type="checkbox"/>		02/01/2006	HB-Wait	HB-Waiting	Completed	State-Administrator		
<input type="checkbox"/>			another test from Dick	Waterbury CFC messag...	Not Started	State Administrator		
<input type="checkbox"/>			URGENT to do test from Nancy	Waterbury CFC messag...	Not Started	State Administrator		
<input type="checkbox"/>			check on DOB for this client from Nancy	Barre LTCCC messages	Not Started	State Administrator		

February 2008						
Sun	Mon	Tues	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	26	27	28	29	

Receiving/viewing messages must be done by running a report, which is discussed in the reports section of this manual.

The Calendar in the lower right corner can be used to enter dates in the date fields. When in the date field (such as due date), simply double click the date on the calendar. It will automatically populate the field for you. Due dates are only used for Activities & Referrals that track time, such as Waiting List.

Wait list

Wait list history for consumers also appears in the Activities & Referrals section of the Contents column. The primary wait list data comes from the Care Enrollment section; this section only tracks waiting time on the wait list.

Below, note that the Subject 'HB Wait' appears, but has been crossed out with a status of completed. This means the consumer was once on the wait list, but is no longer waiting.

When a consumer goes onto the Wait list, it is imperative to enter a Start Date. This identifies when the consumer began waiting.

When the consumer is taken off the wait list, it is important to enter a Date Completed. This allows for reporting as to how long consumers are on the waiting list.

Social Assistance Management System - [Aardvark, Anabelle Y - Consumer]

File Edit View Tools Window Help

Consumers Activities & Referrals Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Anabelle Y - Consumer

Close Consumer Save Save and Close Add Activity/Referral Edit Activity/Referral Delete Activity/Referral Find Apply Apply And Close

Aardvark, Anabelle Y 104356789 01/04/1935 73 Not Specified Kara Artus Print Activity/Referral Print Preview Activity/Referral

Aardvark, Anabelle Y - Activities & Referrals

Complete?	Due Date	Date Com...	Subject	Action	Status	Create User	Agency	Provider
<input checked="" type="checkbox"/>		02/01/2006	HB Wait	HB Waiting	Completed	State Administrator		
<input type="checkbox"/>			another test from Dick	Waterbury CFC messag...	Not Started	State Administrator		
<input type="checkbox"/>			URGENT to do test from Nancy	Waterbury CFC messag...	Not Started	State Administrator		
<input type="checkbox"/>			check on DOB for this client from Nancy	Barre LTCCC messages	Not Started	State Administrator		

Action Details

Site

Status Completed

Reason

Status Date 02/01/2006

Due Date

Start Date 10/01/2005

Start Time

Date Completed 02/01/2006

Time Completed

Follow-Up Status Not Required

Follow-Up In Date

Comments

February 2008

Sun	Mon	Tues	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	26	27	28	29	

7 Items, 1 Selected

TRACEVH SAMS2K_VT_DAIL 2/12/2008 10:29 AM

start Inbox - Micro... MetaFrame Pre... SAMS Documen... Citrix ICA Cl... CFC Full SAMS ... 10:22 AM

7. User Fields

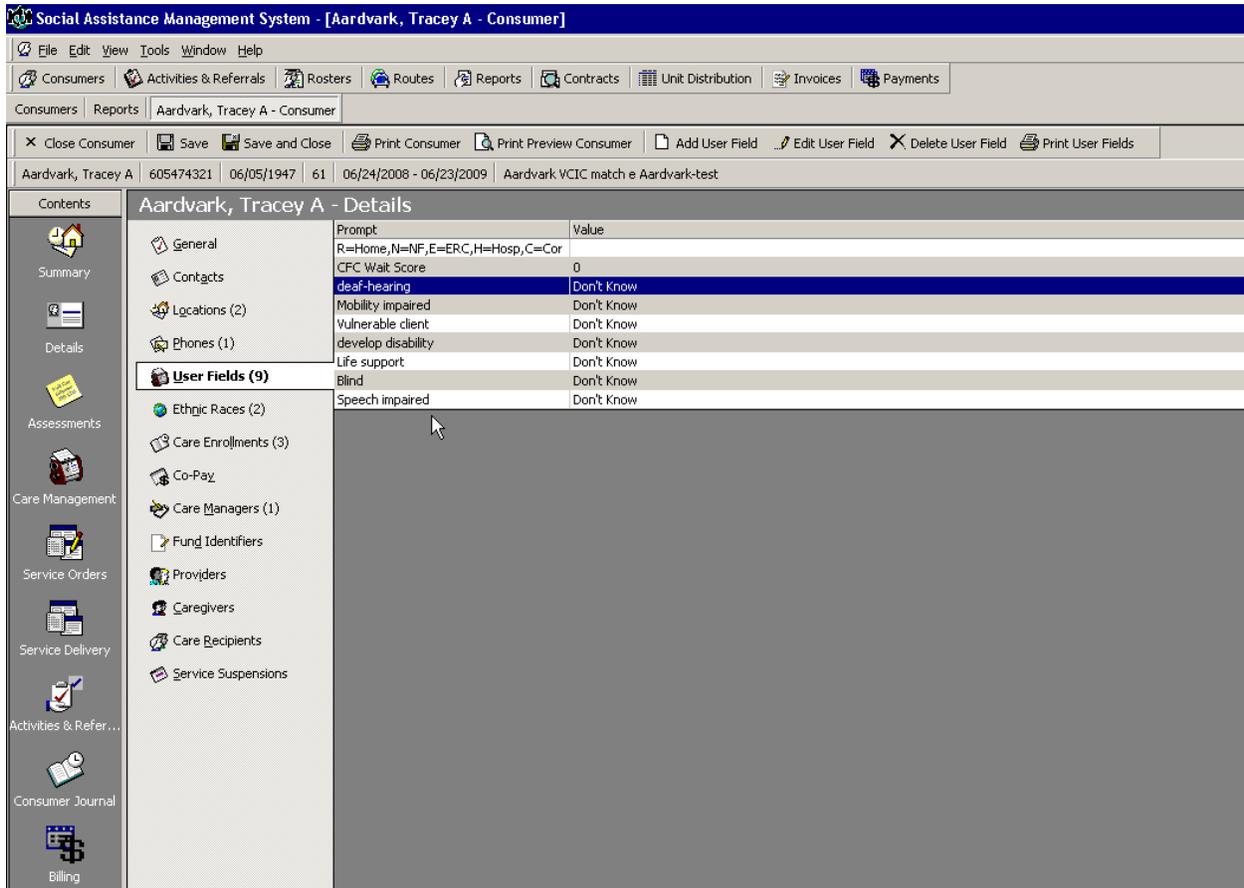
Under the Details button in the Contents column, there is a link for User Fields, as seen below. Click it to view entries regarding wait score for the wait list and the consumer's setting at application. However, keep in mind that this information is easier to enter from the details screen, CFC User Fields and Vulnerable sections.

The screenshot displays the SAMS application window for consumer Aardvark, Anabelle Y. The interface includes a menu bar, a toolbar with various functions like 'Consumers', 'Rosters', and 'Reports', and a main content area. The 'Contents' column on the left lists various sections, with 'User Fields (2)' highlighted. The main area shows the 'Aardvark, Anabelle Y - Details' screen, which is divided into several sections: General, Personal, Residential Address, Mailing Address, NAPIS, Status, Insurance, Other, and Characteristics. The 'Personal' section is currently expanded, showing fields such as Prefix (Mrs.), First Name (Anabelle), MI (Y), Last Name (Aardvark), AKA Name (Antie Aardvark), Date Registered (08/01/2005), Consumer Details Last Reviewed (09/13/2005), Marital Status (Married), Gender (Female), Birth Date (01/04/1935), SSN (123-45-6789), and Home Phone (555-5555).

Personal	
Prefix	Mrs.
First Name	Anabelle
MI	Y
Last Name	Aardvark
Suffix	
Maiden Name	
AKA Name	Antie Aardvark
Date Registered	08/01/2005
Consumer Details Last Reviewed	09/13/2005
Marital Status	Married
Gender	Female
Birth Date	01/04/1935
SSN	123-45-6789
Info Release Authorized	Yes
Default Agency	
Area Code	802
Home Phone	555-5555
Residential Address	
Mailing Address	
NAPIS	
Status	
Insurance	
Other	
Characteristics	

Wait Score

The CFC Wait Score, as shown below is given a value. This value represents the consumer's needs as represented on the High Needs Waiting List.



Setting at Application

The item on the list “R=Home, N=NF,...” represents the setting the consumer was in when applying for Choices for Care services. The Prompt lists the choices of R for home (Residence), N for a Nursing Facility, E for an Enhanced Residential Care facility, H for a hospital and C for Corrections.

Vulnerable Client Information

Information on Vulnerable Clients is also found in the User Field section. Simply double click the vulnerable choices and choose Yes or No depending on whether the client is vulnerable for the reason chosen.

8. Running Reports Report Categories

To run reports, click on Reports from the main SAMS screen. See the red arrow below. After clicking the Reports button, you will see the screen below. Notice that there are many different categories of reports, as shown in the Category column.

Consumer - Reports

Report Title	Description	Comments
ASP Termination Report	ASP Termination Report	Report created by Doug Thomas (DAIL)
ASP Waiting List	Waiting list for ASP GFPDAC	Report created by Doug Thomas (DAIL) file is on agingnetwo...
Consumer Action Report	A report showing all consumer actions.	SAMS Report
Consumer Goal Report	A report showing all complete and/or incomplete Care Plan Goals for consumers.	SAMS Report
Consumer Listing Report	A report of all consumers showing results based upon criteria selected.	SAMS Report
Consumer Mailing Label Report	Avery 5160 Labels generated based upon report of all consumers.	SAMS Report
Consumer Service Order Report	A report of active service orders.	SAMS Report
Food Stamp Report	Food Stamp Report	Report created by Doug Thomas (DAIL)

Report Definitions

Title	Description	Comments
AAA COASEV CFC clients active	for COASEV towns	
AAA CVAA CFC clients active	for CVAA towns	
AAA CVCOA CFC clients active	for CVCOA towns	
AAA NEVAA CFC clients active	for NEVAA towns	
AAA SVCOA CFC clients active	for SVCOA towns	
active between 10/01/05 to 5/19/06		
Active Flex Choice		
APS clients		
ASP Active		
ASP Alpha Waiting List		
ASP Consumers by Program		
asp termination		
ASP Waiting List		
Barre District active clients	includes short term NH clients	for George
Barre District pending/received clients		for George
Barre District Terminated Clients		for George
Barre Pending Medicaid - Length of Time	enter status date on or before 2 months ago	
Bennington District Active clients		for Jessica
Bennington Pending and Received		For Jessica
Bennington Pending Medicaid - Length of Time	enter status date on or before 2 months ago	
Brattleboro ACTIVE	HB, ERC, NF settings	Brattleboro DAIL Office Report

Assessment reports show next assessment dates, Consumer reports show consumer demographic and program data, Service reports shows service delivery data and Care Management reports show plan of care data.

The upper portion of the screen below represents the different types of reports under each category. When you click on the report category Consumer, for example, all of the consumer report templates will appear in the upper section. The Consumer List Report type has multiple Report Definitions as shown on the lower portion of the screen.

After single clicking on the Consumer report template called Consumer Listing, all previously saved reports created with that template will appear in the lower portion of the screen. For this example, double click on CFC Active by Service Program Highest and Highest Special Circumstances, you will see the report definition for consumers in the CFC Program.

Consumer - Reports

Report Title	Description	Comments
ASP Termination Report	ASP Termination Report	Report created by Doug Thomas (DAIL)
ASP Waiting List	Waiting list for ASP GFPDAC	Report created by Doug Thomas (DAIL) file is on agingnetwo...
Consumer Action Report	A report showing all consumer actions.	SAMS Report
Consumer Goal Report	A report showing all complete and/or incomplete Care Plan Goals for consumers.	SAMS Report
Consumer Listing Report	A report of all consumers showing results based upon criteria selected.	SAMS Report
Consumer Mailing Label Report	Avery 5160 Labels generated based upon report of all consumers.	SAMS Report
Consumer Service Order Report	A report of active service orders.	SAMS Report
Food Stamp Report	Food Stamp Report	Report created by Doug Thomas (DAIL)

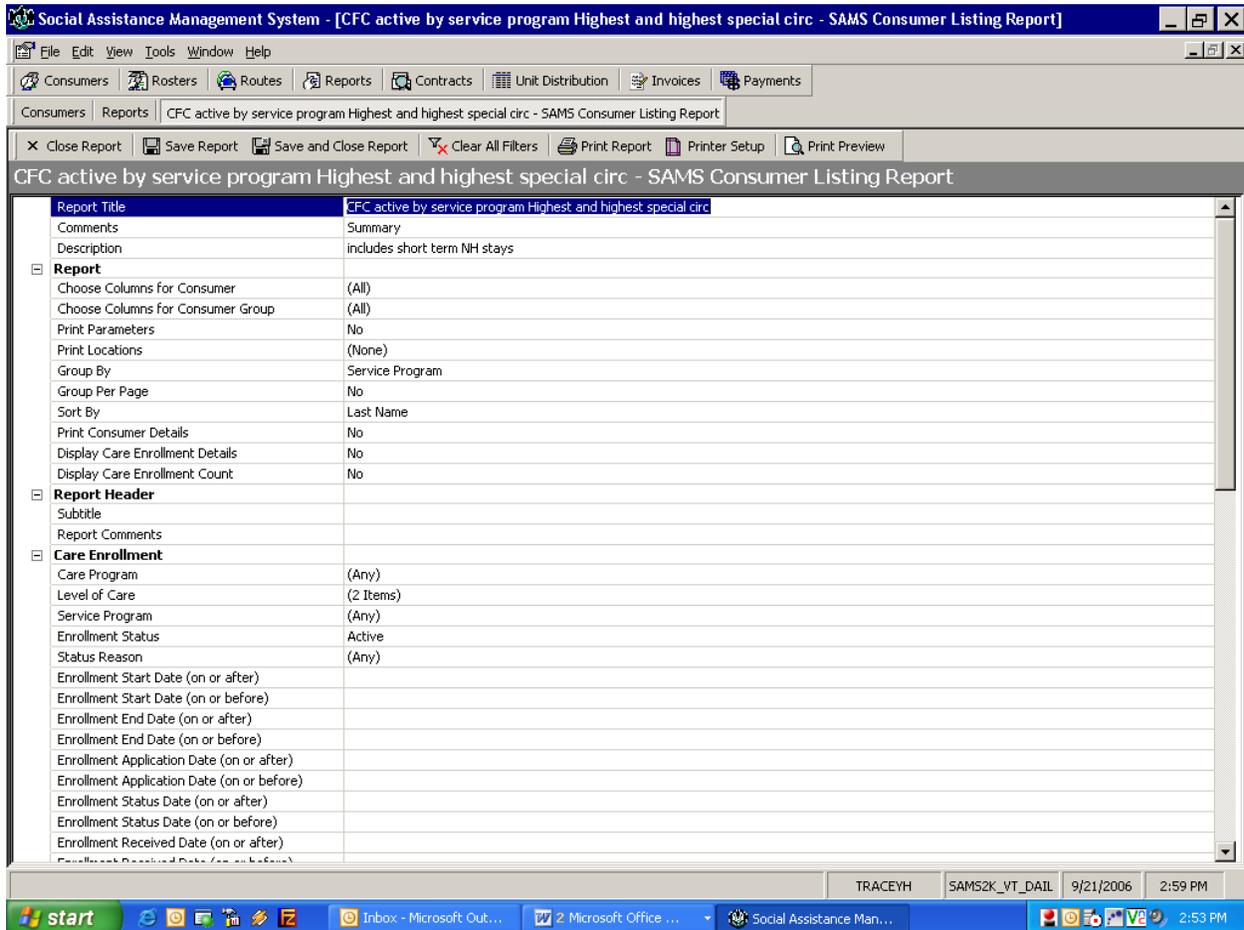
Report Definitions

Title	Description	Comments
Brattleboro Pending & Received		For Mary Woods
Brattleboro Pending Medicaid - Length of Time	enter status date on or before 2 months ago	
Burlington ACTIVE	HB, ERC, NF settings	Burlington DAIL office report
Burlington Denied	Clinical and financial denials	
Burlington MODERATE group		Burlington DAIL office report
Burlington- Nursing Facilities - "Pending Medicaid"	Burlington DAIL office report	All Nursing Facility applicants in Burlington region
Burlington PENDING Medicaid	HB, ERC, NF	Burlington DAIL office report
Burlington Pending Medicaid - Length of Time	enter status date on or before 2 months ago	
CFC ACTIVE + Pending	Highest/High by Service Program (HB,ERC,NH)	Statewide alphabetical list
CFC Active and Pending for Dale Brooks	Moderate/High/Highest for ERC, HCBS, NH	For Dale Brooks
CFC active by county ERC		Summary
CFC active by County HCBS		Summary
CFC active by County Moderate		Summary
CFC active by County NH	includes short term NH stays	Summary
CFC active by service program		Summary for Jim Giffen
CFC active by service program High	includes short term NH stays	Summary
CFC active by service program Highest and highest special circ	includes short term NH stays	Summary
CFC Active by service program Highest Special Circumstance	special circumstance	
CFC active by service program Highest Special Circumstances		
CFC active by service program Moderate		Summary
CFC active erc by county		Summary for Jim Giffen

Report Selection Criteria

The selection criteria for the example report are listed below. This report has selected 2 levels of care for CFC and it allows any service program in any of those levels. Specific service programs such as ERC, Nursing Home or HCBS may also be chosen. Other criteria include status such as active or waiting, any provider or agency, start date or end date, town of residence or municipality, which is the DAIL district office.

Change selection criteria by simply clicking on the field and using the drop down arrow to the right or the "...” symbol. This will bring up more choices.



Print Report/Print Preview

After clicking Print Preview, an onscreen view of the report will show as seen below. The size of the preview can be changed by altering the number in the box showing the %. If parameters of the report need to be changed (a date, service, status, etc), make the change on the left hand side of the screen and hit Refresh Report to preview the report with the new parameters. To print the report, click on the Print Report button. If you want to save the new parameters you can click Save and Close or if you just want to quit you can click Close report.

The screenshot displays the SAMS application window. The title bar reads "Social Assistance Management System - [CFC active by service program Highest and highest special circ - SAMS Consumer Listing Report]". The menu bar includes File, Edit, View, Tools, Window, and Help. The toolbar contains icons for Consumers, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, and Payments. The main window title is "CFC active by service program Highest and highest special circ - SAMS Consumer Listing Report".

On the left, a filter pane is visible with sections for Report, Report Header, and Care Enrollment. The Report section includes options like "Choose Columns for Consumer" (set to All), "Print Parameters" (No), and "Group By" (Service Program). The Care Enrollment section includes filters for "Care Program" (Any), "Level of Care" (2 Items), "Service Program" (Any), and "Enrollment Status" (Active).

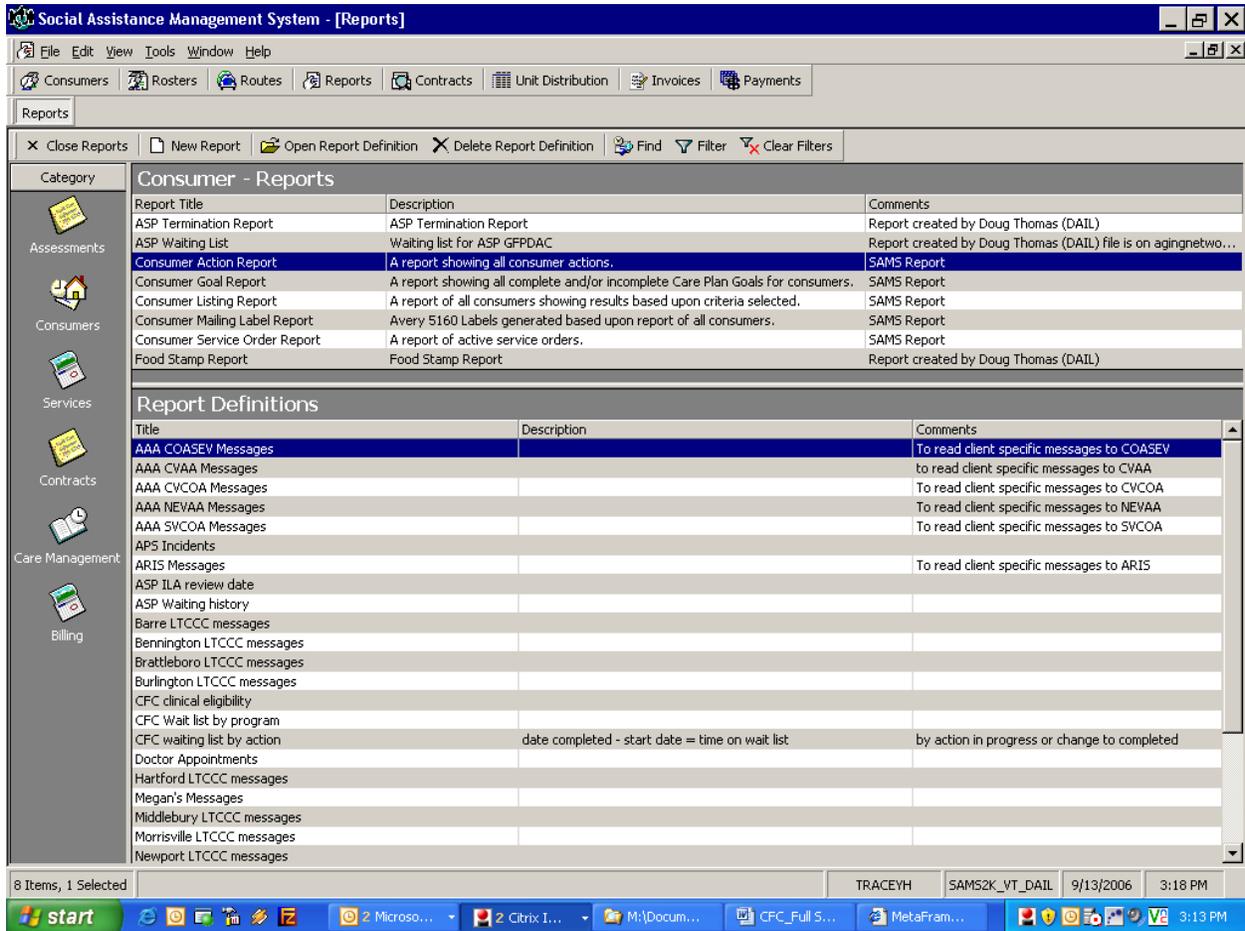
The right-hand pane shows a preview of the report. A "Preview" dialog box is open, showing a percentage of 58% and a "Page Width Whole Page" option. The report preview includes a table with the following data:

Client ID	Gender	DCB	Primary Phone	Town of Residence	County	Zip
Summary						
Total						194 consumers.
Total						655 consumers.
Total						2,072 consumers.
Total						12 consumers.
Total						35 consumers.
Grand Total						3,242 consumers.

At the bottom of the window, the taskbar shows the Start button and several open applications, including "Inbox - Microsoft Out...", "Microsoft Office...", and "Social Assistance Man...". The system tray on the right shows the date and time as 9/21/2006, 3:13 PM.

Consumer Action Reports

When you click on Consumer Action Reports you see all previously defined reports. Most significant for this manual are the waitlist reports and the messaging reports.



CFC Wait List Report

Double clicking on the CFC wait list by action in progress will show the selection criteria for consumers currently on the wait list.

The screenshot shows the SAMS application window titled "Social Assistance Management System - [CFC waiting list by action - SAMS Con...". The main content area displays the "CFC waiting list by action - SAMS Consumer Action Report" with the following details:

Report Title	CFC waiting list by action
Comments	by action in progress
Description	
Report	
Choose Columns for Consumer	(All)
Choose Columns for Group	(All)
Print Parameters	No
Group By	Action
Group per Page	No
Sort By	Last Name
Show Action Details	Yes
Print Consumer Details	Yes
Report Header	
Subtitle	
Report Comments	
Action	
Action	(4 Items)
Status	In Progress
Reason	(Any)
Status Date (on or after)	
Status Date (on or before)	
Due Date (on or after)	
Due Date (on or before)	

The interface also shows a taskbar with the Start button, system tray icons, and a status bar at the bottom right displaying "STATEADMIN SAMS2K_VT_DAIL 9/8/2005 1:35 PM".

CFC Wait List Preview

The report is shown when preview is clicked and it is sorted by last name according to the criteria chosen below. It also shows totals. This report can be used for historical data on waiting list by selecting dates for the action. There will need to be some custom reports written to show consumers by waiting list score.

SAMS Consumer Action Report Configuration:

- Report Title: CFC waiting list by action - SAMS Consumer Action Report
- Comments: by action in pro...
- Description:
- Report**
 - Choose Columns for Consumer: (All)
 - Choose Columns for Group: (All)
 - Print Parameters: No
 - Group By: Action
 - Group per Page: No
 - Sort By: Last Name
 - Show Action Details: Yes
 - Print Consumer Details: Yes
- Report Header**
 - Subtitle:
 - Report Comments:
- Action**
 - Action: (4 Items)
 - Status: In Progress
 - Reason: (Any)
 - Status Date (on or after):
 - Status Date (on or before):
 - Due Date (on or after):
 - Due Date (on or before):

Report Preview:

City Phone	Town of Residence	County	Zip
	Springfield	Windsor	0515
879-1111	Essex	Chittenden	0545

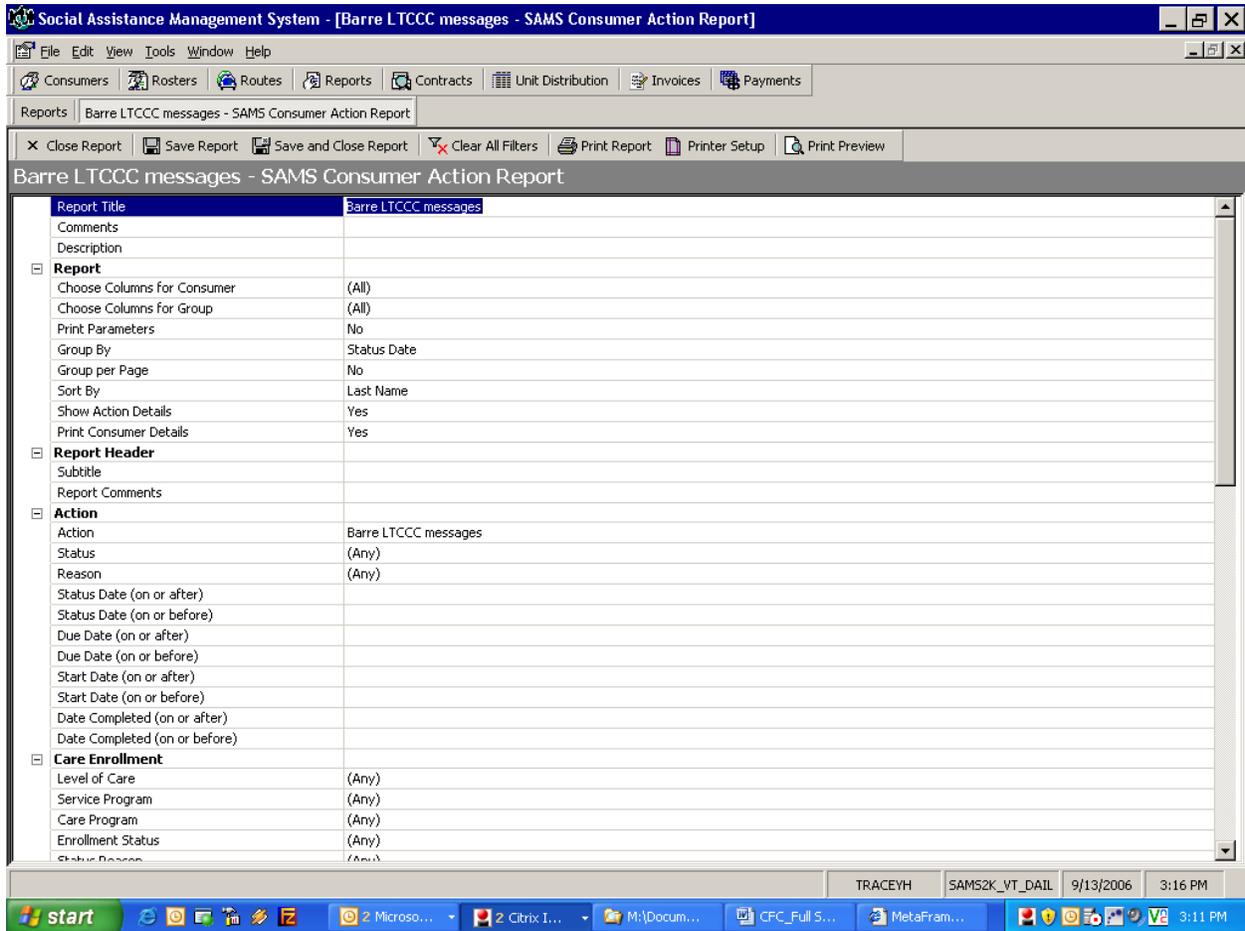
Summary: 2 unduplicated consumers

Grand Total: 2 unduplicated consumers

Summary: 2 consumers; 0 consumer group.

LTCCC Messaging Reports

For this example, we'll use the Barre LTCCC messages report. Double clicking on the Barre LTCCC messages will show the selection criteria for messages waiting to be read by the Barre LTCCC.



Messaging Reports preview

The report is shown when preview is clicked and it is sorted by last name according to the criteria chosen below. It also shows totals. These reports are used to transfer messages regarding consumers between LTCCCs and their supervisors in a confidential manner.

SAMS Consumer Action Report
- Barre LTCCC messages

Client ID	Full Name	Gender	DOB	Primary Phone	Town of Residence	City
104356789	Aardvark, Anabelle Y	F	01/04/1935	H. (802) 555-5555	South Burlington	Chit

Status Date: 2/1/2006
SSN: 123-45-6789

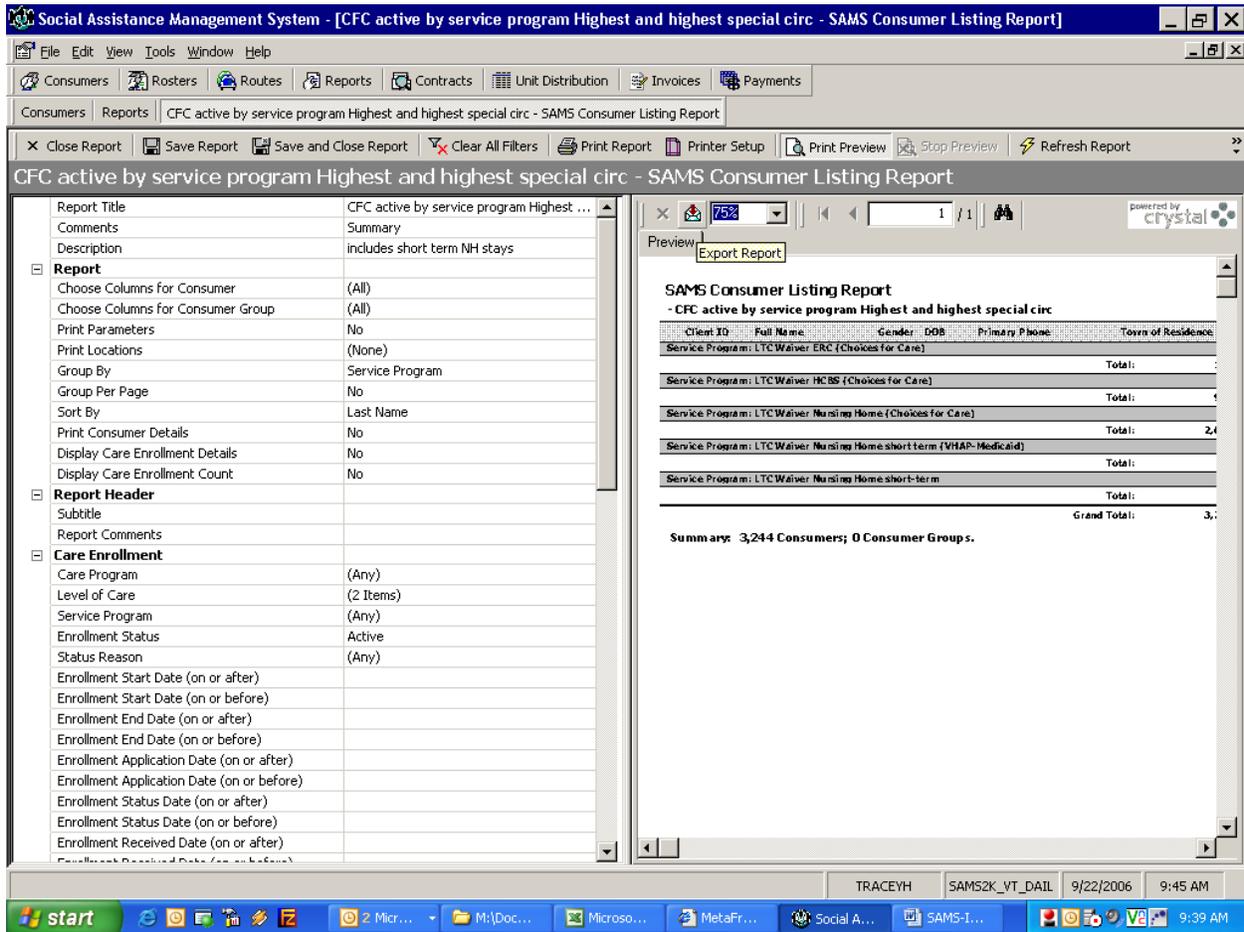
Subject	Action	Status	Start Date	Due Date	Date
check on DCB for this client from Nancy	Barre LTCCC messages	Not Started	2/1/2006	n/a	n/a

Reason: This client is missing DCB, please follow up and enter correct data in SAMS

Totals:	1 unduplicated consumer
Grand Total:	1 unduplicated consumer
Summary:	1 consumer; 0 consum

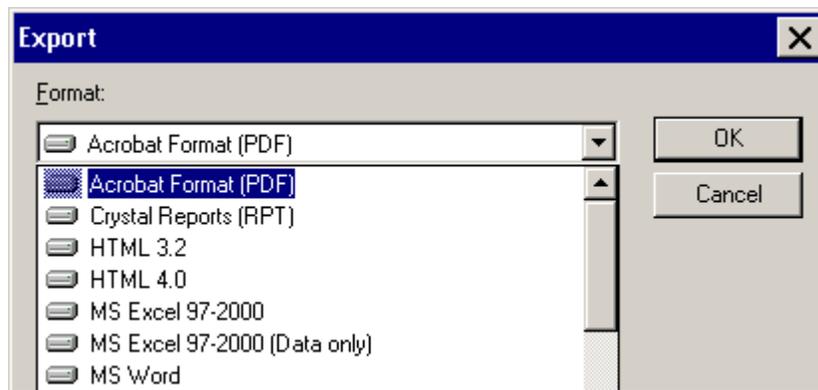
Exporting Reports

Another option is to export the report (save it to a file) by clicking on the envelope.



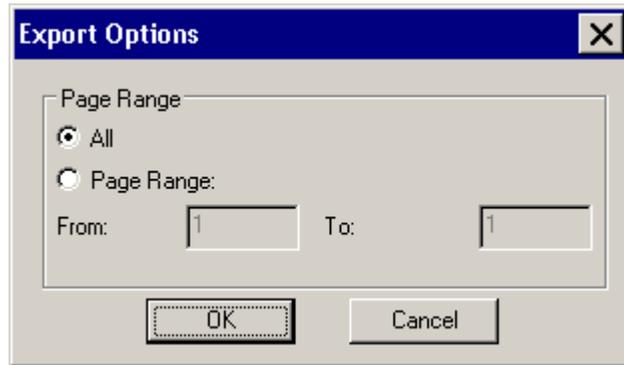
Format Option

After clicking the export envelope, the following dialogue box will appear. Choose which format to save as and click OK. Options include formats such as PDF (Adobe) and Microsoft Excel and Word.



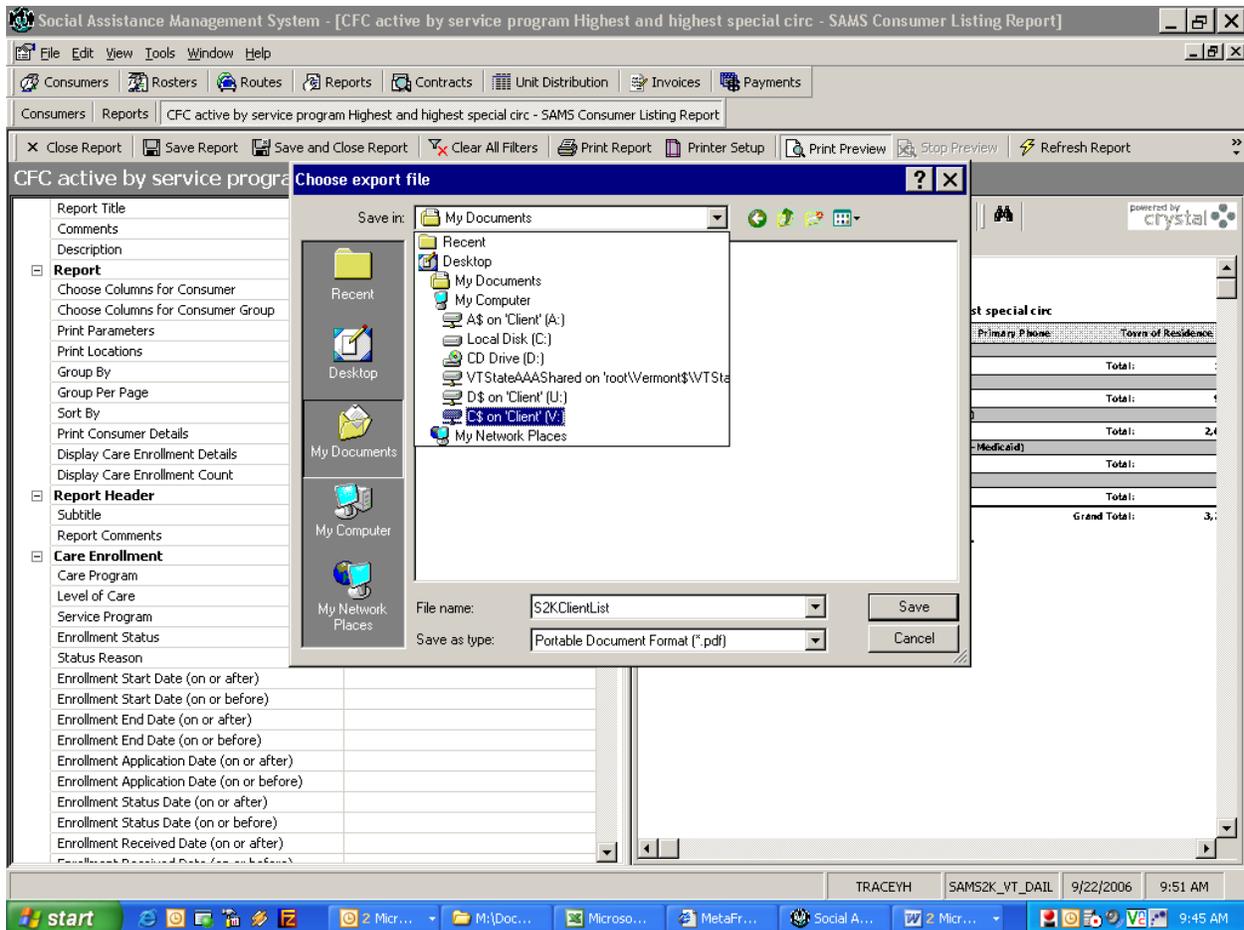
Export Page Range Options

Clicking OK will cause the dialogue box below to appear. Here, it is possible to export or save all pages in the report or just a specified range of pages. Once the appropriate options is chosen, click OK.



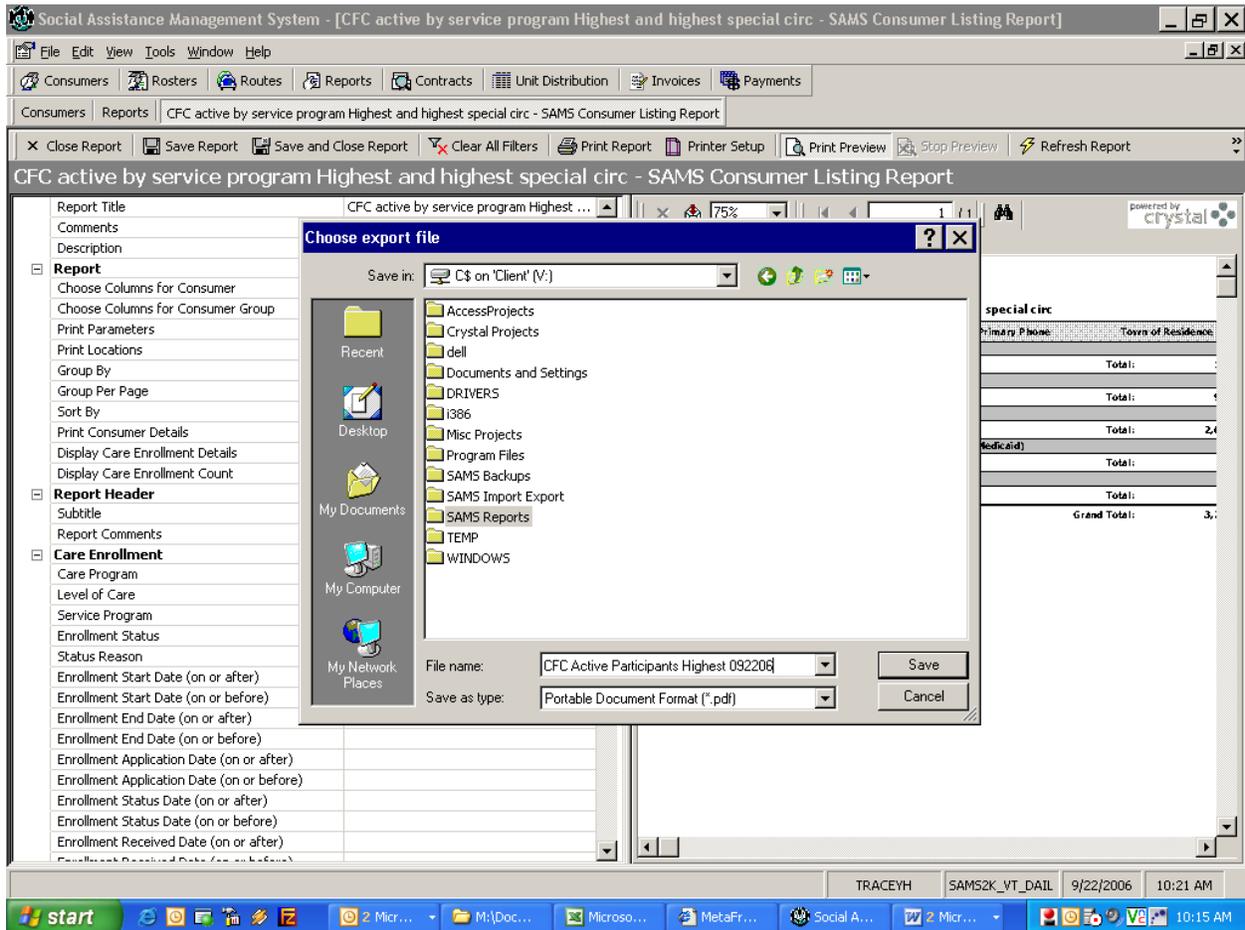
File Location Options

The screen below will appear once the Page Range option is chosen. First, choose where to save it by clicking in the save in arrow. Usually, files will be saved on "C\$ on Client V:" as shown below. This will save the file to computer's C: drive hard disk. Files may also saved to a floppy disk in the computer's A: drive by choosing "A\$ on Client A:" in the choices below.



In this example, the file will be saved on the C: drive of the computer. After choosing "C\$ on Client V:", the folder under the C: drive will appear in the folder list. To save in a folder under the C: drive, double click the folder to open. Below, the folder "SAMS Reports" has been highlighted. After double clicking the folder in which to save the file, give the file an appropriate file name in the File Name field, such as a description of the report and the date the report was run. For this example, the file has been named "CFC Active Participants Highest 092206".

After the File name has been entered, click Save to save the file. The file can then be printed from another program such as Microsoft Word or Adobe Acrobat. The file can also be sent electronically via email attachment. For email attachments, it is required that the file be zipped and password protected.

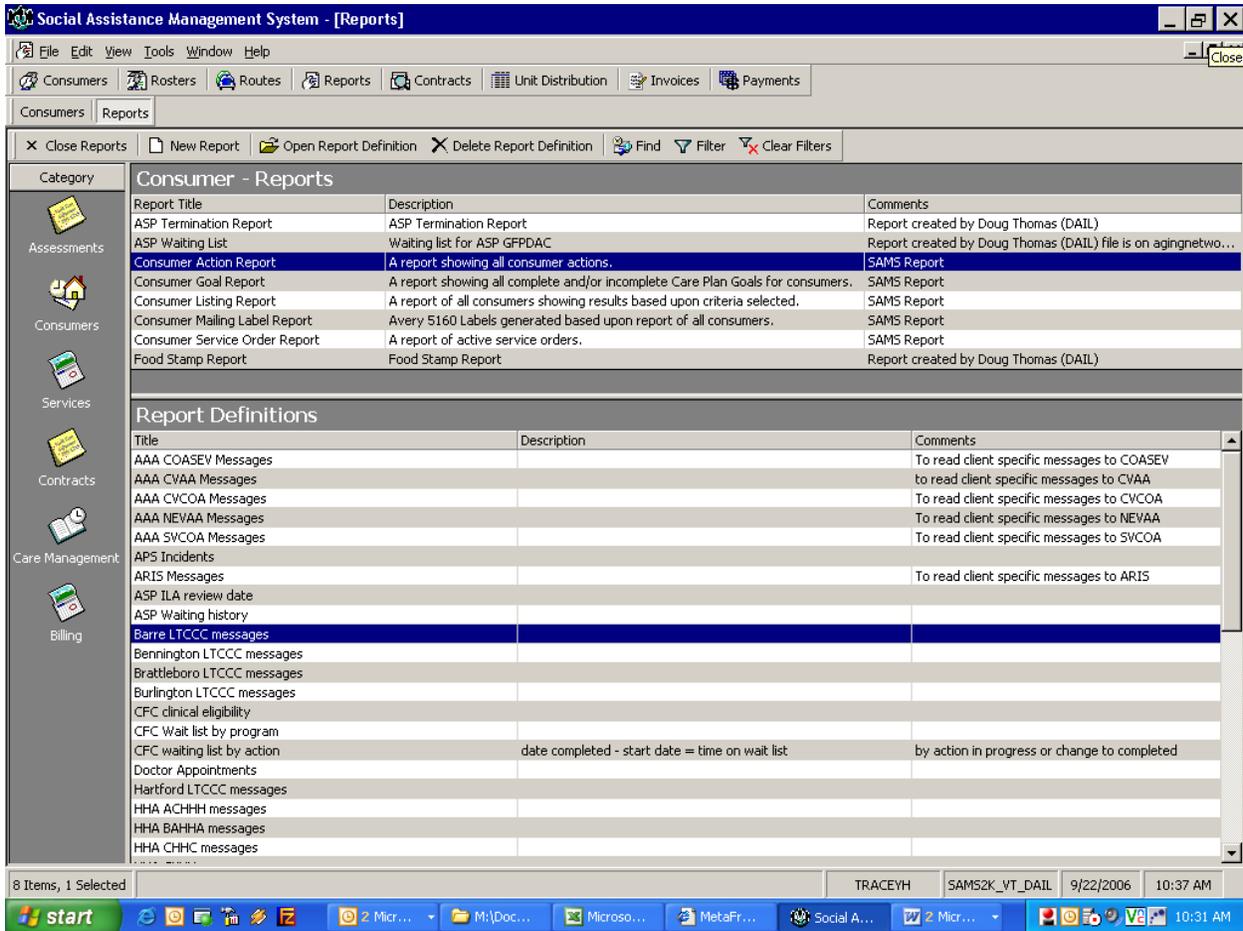


Close Reports

To exit the report, click Close Report in the upper left of the screen above the report criteria.

9. LOGOFF or Exit SAMS

To logoff at any time, simply click the highest X in the top right corner. If you get a message to save data, click Yes to save.



THAT S ALL FOLKS!



Glossary of Terms

AAA: Area Agency on Aging

Activities of Daily Living (ADL): ADL means dressing and undressing, bathing, personal hygiene, bed mobility, toilet use, transferring, mobility in and around the home, and eating.

Agency: A private non-profit organization which provides care or services.

Agency of Human Services: The Vermont state agency responsible for oversight of the Department of Disabilities, Aging and Independent Living (DAIL).

Applicant: An individual who has applied to the Choices for Care, VT Long-Term Care Medicaid program to receive services.

Area Resource for Individualized Service (ARIS): A private non-profit organization currently under contract with the State acting as the Intermediary Service Organization (ISO) for consumer and surrogate directed services.

Assessment: The tool and process used to document an individual's strengths, needs, and unmet needs as they relate to health, social and functional status. The assessment is used to determine clinical eligibility for Choices for Care, VT Long-Term Care Medicaid.

Caregiver: A person who provides personal care (for reimbursement or as a volunteer).

Choices for Care (CFC): The program name used to identify the new Vermont Long-Term Care Medicaid, (1115 Waiver) program.

Choices for Care Team: Previously known as the "Medicaid Waiver Team", the group of local provider agencies and other relevant organizations which meets on a regular basis to collaborate in managing Choices for Care, VT Long-Term Care Medicaid services, in accordance with the local/regional protocol.

Consumer/Client: A person who has applied for services or who receives services.

Consumer-Directed Service: Services directed by the participant, functioning as an employer of paid caregivers.

Department for Children and Families (DCF): The state department within the Vermont Agency of Human Services (AHS) with primary authority for the state financial eligibility determination for Choices for Care, VT Long-Term Care Medicaid services. DCF is also responsible for administration of other state health care and financial benefits for Vermonters.

Department of Disabilities, Aging and Independent Living (DAIL): The state department within the Vermont Agency of Human Services (AHS) with primary authority for the state management, approval, and oversight of Choices for Care, VT Long-Term Care Medicaid services.

Division of Disability and Aging Services (DDAS): The division within the Department of Disabilities, Aging and Independent Living (DAIL) that is responsible for managing the Choices for Care, Long-Term Care Medicaid program.

Employee: A person who provides care or services and receives reimbursement from another individual or organization.

Employer: A consumer, surrogate, or organization that manages and supervises Choices for Care, VT Long-Term Care Medicaid services employees.

Estate Recovery: The process in which the Office of Vermont Health Access (OVHA) may recover the cost of Choices for Care, Long-Term Care Medicaid services that have been provided to an individual and paid for by the State of Vermont. The process of Estate Recovery occurs after the individual has passed away and is done through the probate court process.

High Needs Group: Individuals who have been found to meet the high needs group clinical eligibility criteria and have been authorized to receive services.

Highest Needs Group: Individuals who have been found to meet the highest needs group clinical eligibility criteria and have been authorized to receive services.

Home Health Agency (HHA): A Medicare Certified home health care agency authorized to provide Choices for Care, VT Long-Term Care Medicaid services.

Instrumental Activities of Daily Living (IADL): Means meal preparation, medication management, phone use, money management, household maintenance, housekeeping, laundry, shopping, transportation, and care of adaptive equipment.

Independent Living Assessment (ILA): An assessment tool used to document an individual's strengths and needs as they relate to health, social and functional status in the home-based setting.

Individual: A person who has applied for or is participating in "Choices for Care", VT Long-Term Care Medicaid.

Legal Representative: An individual who has the legal authority, via a power of attorney document or court appointed guardianship, to make decisions or perform certain activities on behalf of another person.

Long-Term Care: Care and services provided to an individual on an ongoing basis for the purpose of accomplishing Activities of Daily Living (ADL's) and Instrumental Activities of Daily Living (IADL's). Long-term care is "non-acute" in nature.

Office of Vermont Health Access (OVHA): The State agency responsible for the management of Medicaid and other publicly funded health insurance programs.

Participant: A person who has been found eligible and receives Choices for Care, VT Long-Term Care Medicaid services.

Patient Share: An individual's monthly share of the cost of Choices for Care, Long-Term Care Medicaid services as determined by the Department for Children and Families (DCF). The amount of an individual's patient share (if any) is based on the individual or couples monthly income.

Personal Care Attendant (PCA): A person who is employed to provide personal care services.

Personal Care Worksheet: The tool used together with the Independent Living Assessment (ILA), to estimate the amount of personal care services that may be provided in the home-based setting.

Primary Caregiver: A person who provides personal care and/or supervision on an ongoing basis, without pay.

Provider: An individual, organization, or agency that has been authorized by the Department to provide Choices for Care, Long-Term Care Medicaid services.

Recipient: A person who receives services.

Reimbursement: Payment for services which have been provided by a person or organization.

Service Plan: A form which identifies the Choices for Care, Long-Term Care Medicaid services which may be provided to a participant within a specified time period, and which when approved by DAIL gives provider organizations authority to provide services and submit claims for reimbursement.

Special Circumstances: Consumer would not normally meet eligibility criteria; however there are special circumstances which allow consumer to be enrolled in Choices for Care.

Surrogate: A person who acts as an employer and manages employees on the behalf of the participant.

Surrogate-Directed Services: Services which a surrogate directs on behalf of a participant, functioning as the employer of paid caregivers (employees).

Utilization Review (UR): A Department of Disabilities, Aging and Independent Living (DAIL) review process intended to assure that the Choices for Care, VT Long-Term Care Medicaid service type and volume are appropriate to meet the needs of eligible individuals, while remaining as efficient as possible.