



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

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



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Version 3.4
August 2008

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Introduction

From the Vermont Department of Disabilities, Aging and Independent Living:

Uses of the SAMS Database by Providers

The purpose of this guide is to support providers of Long Term Care services in accessing data about their clients in the Vermont Choices for Care program.

DAIL is allowing service providers limited access to the Choices for Care (CFC) database in SAMS. If a provider is listed in a care plan or as the case management agency, that provider will be able to see the available information for that client. If a provider is not listed in a care plan or as the case management agency, that provider cannot see any information about the client. Clients in a waiting status without a plan of care can be seen by the assigned case management agency.

We hope that this access to the CFC data will improve communication with providers about the current status of their clients in the CFC program. The database is accessible 24 hrs a day and 7 days a week to approved providers via internet access. SAMS contains up to date information on enrollments and care plans, and allows providers to send secure messages to DAIL staff (and to other providers who also have a plan of care connection to the same client). SAMS also allows providers to run reports on their clients in the CFC database.

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.

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.

Hardware & Software Requirements:

Minimum configuration

- Pentium II class 400 MHz processor
- 256 MB of RAM (memory)
- CD ROM
- Windows 98/Me/XP or Windows 4.0 NT/Windows 2000 Professional
- Display resolution of 800X600

Recommended configuration

- Pentium III class 400 MHz processor or better
- 384 MB of RAM
- CD ROM
- Windows 98/Me/XP or Windows 4.0 NT/Windows 2000 Professional
- Display resolution of 800X600

***** It is not recommended to use Microsoft Vista with SAMS/Omnia. Vista contains Citrix Version 10 which will cause issues with SAMS/Omnia. If you must use Microsoft Vista, you will need to uninstall Citrix 10 and install Citrix 9.2.**

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:

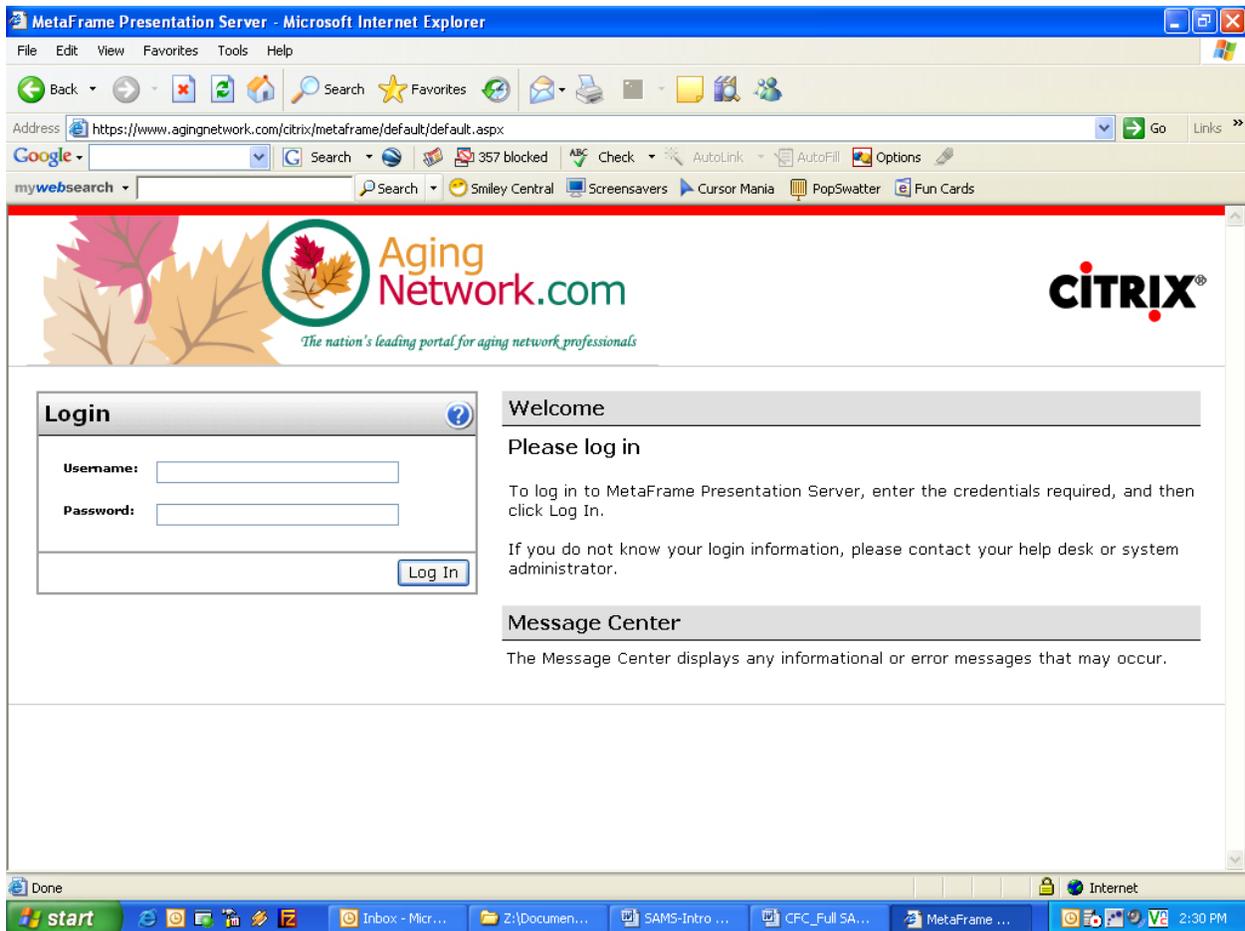
Types of Problems	Contact	Phone	Email	Organization
Initial Login Setup	Tracey Harrington	241-2629	tracey.harrington@ahs.state.vt.us	DAIL/DDAS
	Dick Lavery	241-2425	Dick.Lavery@ahs.state.vt.us	DAIL/DDAS
Forgetting password	Tracey Harrington	241-2629	tracey.harrington@ahs.state.vt.us	DAIL/DDAS
Adding/deleting 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".

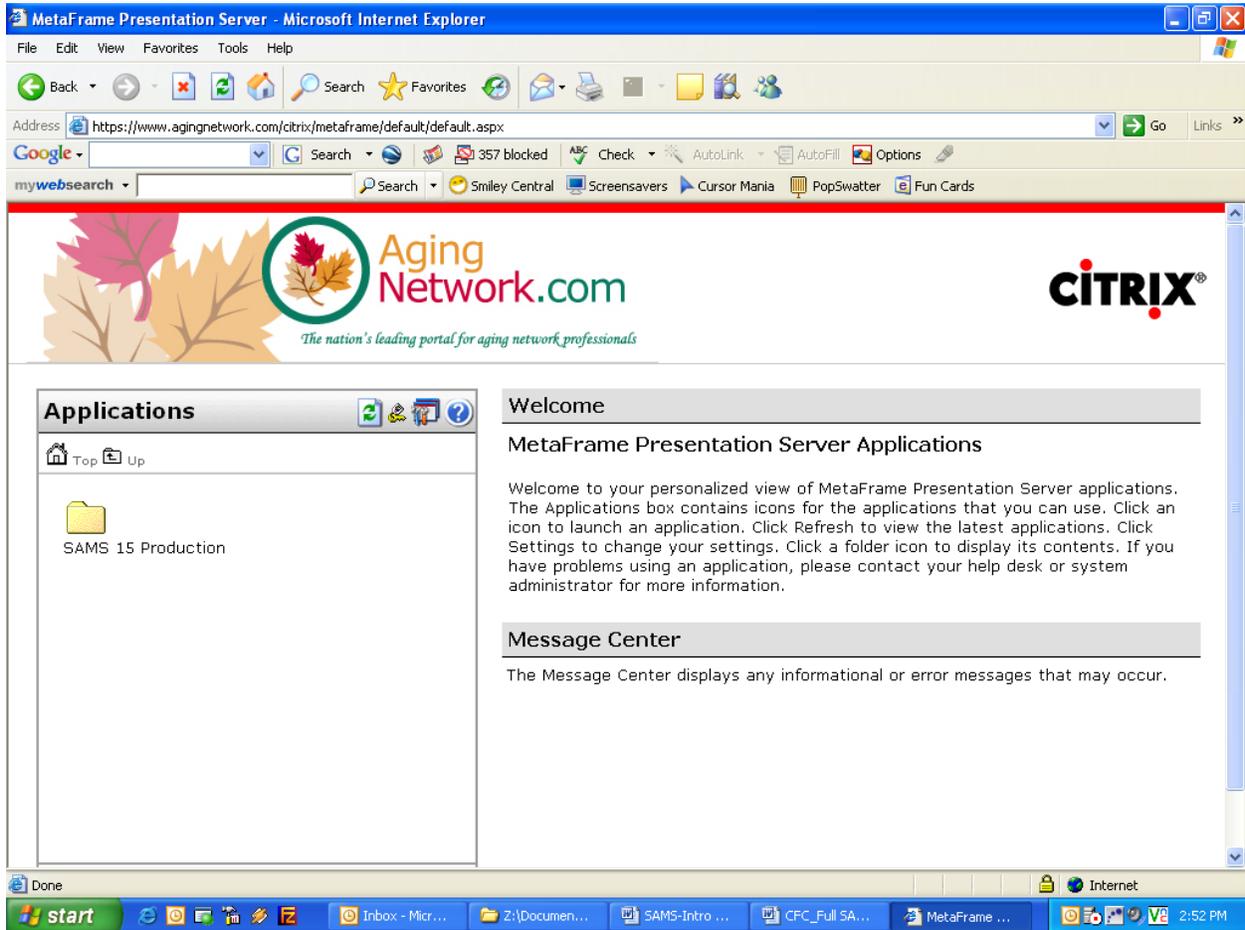


Clicking on the "Agingnetwork.com Login" link will take you to the following screen, which gives access to the Agingnetwork. Note that the first time you login, the Citrix Web Client will need to be installed. If you do not have administrative privileges on your computer, please contact your local IT 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.

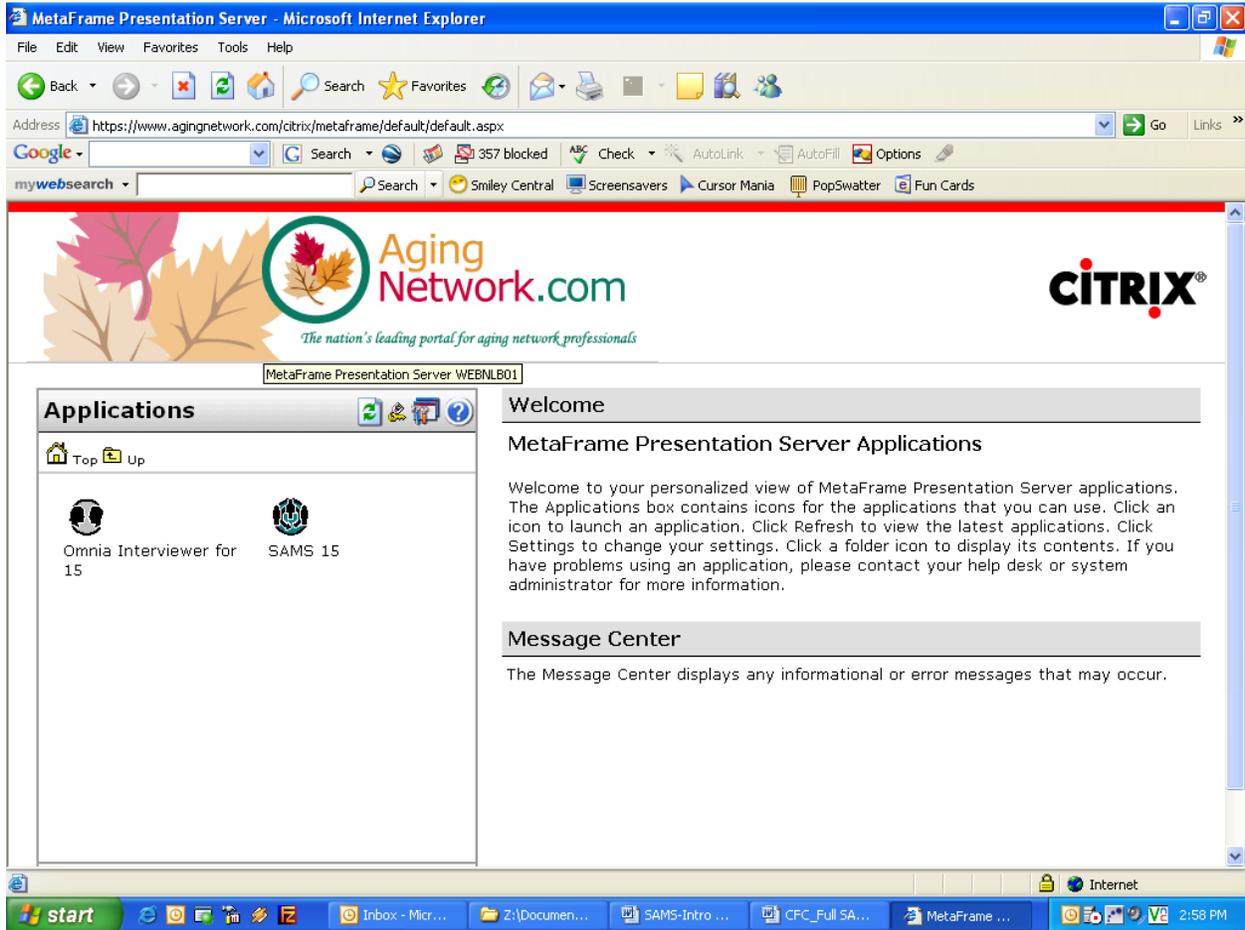


Once logged into Agingnetwork, click on the "SAMS 15 Production" folder.

SAMS 15 refers to version 1.5 of SAMS 2000. As SAMS is updated with new versions, this reference will change.



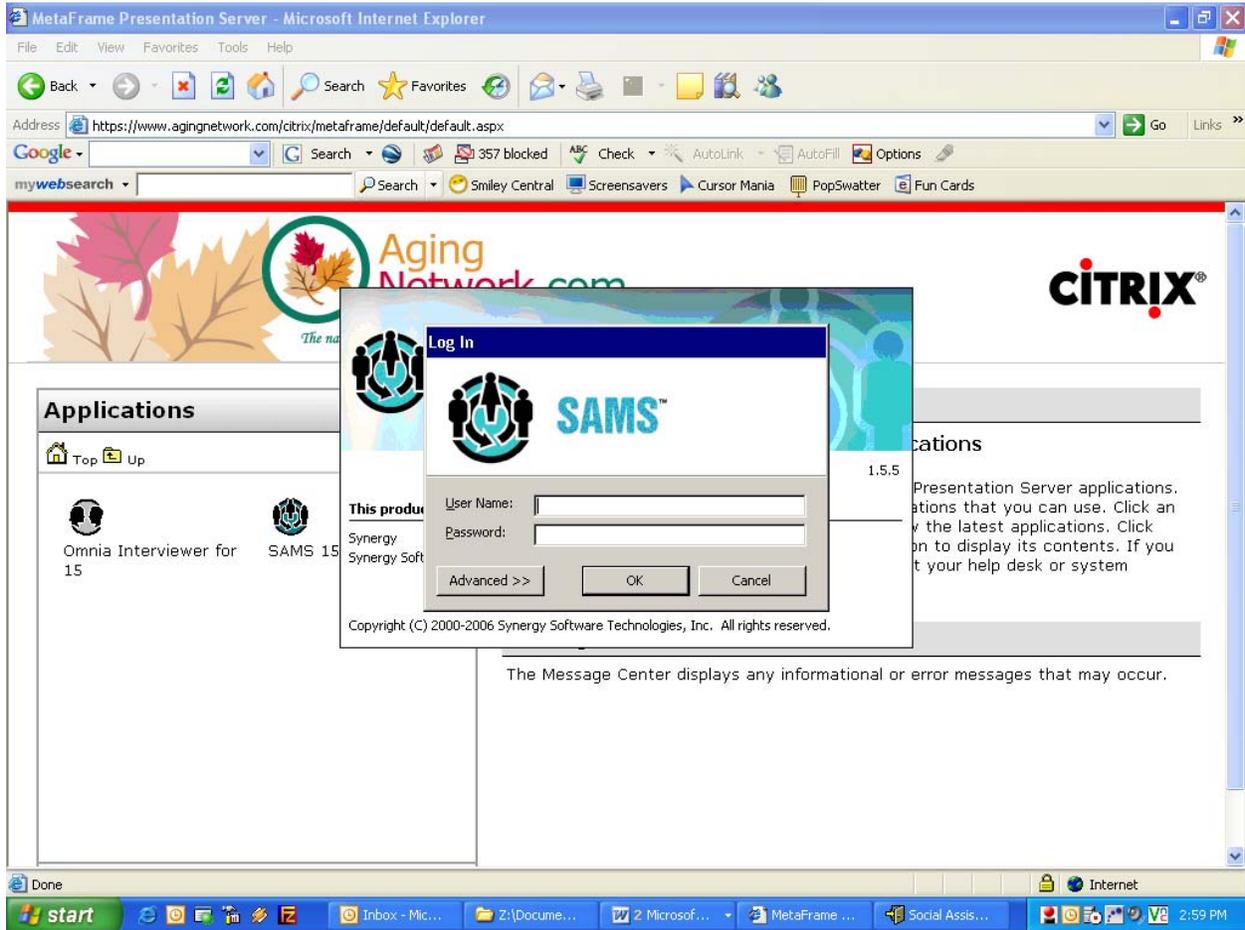
After clicking on the SAMS 15 Production folder, you will see those applications available to you (based on your permissions).



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. May also be 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 Synergy or by DAIL/DDAS.



1. Finding/Searching for 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.)

The screenshot shows the Social Assistance Management System (SAMS) interface. The window title is "Social Assistance Management System - [Consumers]". The menu bar includes File, Edit, View, Tools, Window, and Help. The main menu contains Consumers, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, and Payments. The Consumers menu is open, showing options like Close Consumers, Register, New, Open, Delete, Properties, Care Enrollments, Service History, Care Recipients, and Caregivers. The search bar shows "Consumers" selected, with filters for "(All)", "aardvark", and "Apply". The search results are displayed in a table titled "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		Lamolle 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		Adel 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...		

The status bar at the bottom shows "11 Items, 1 Selected (Filters Applied)". The taskbar at the bottom includes the Start button and several open applications: Inboxes - Mic..., M:\Docume..., Microsoft..., MetaFrame..., and Social Assis... The system clock shows 3:57 PM on 9/20/2006.

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 you can filter by multiple criteria at a time. For instance, if you wanted to find all consumers with the last name of “Aardvark” in an Active Status, enter Aardvark for the last name and choose Active in the Status choice.

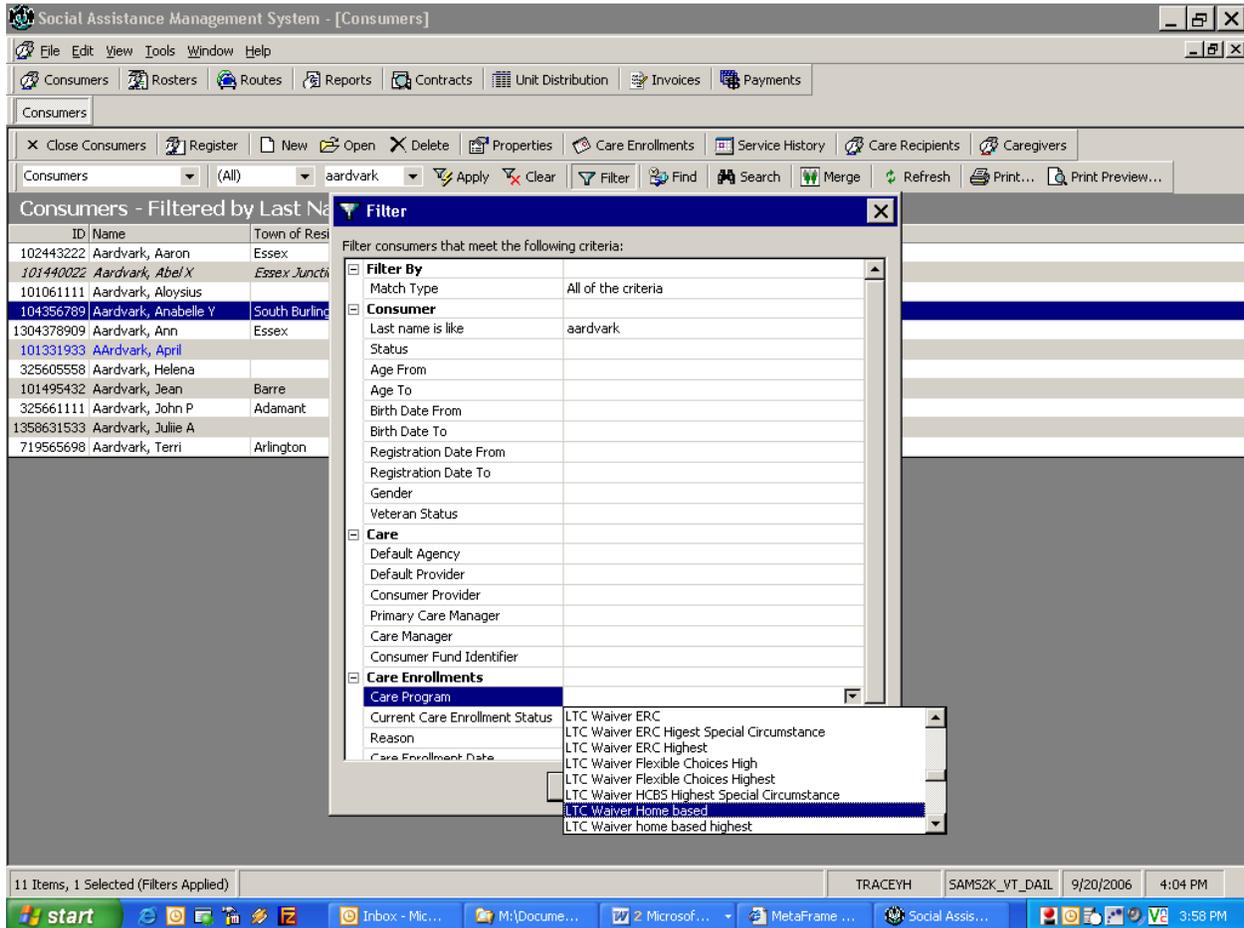
Note that the first field, “Match Type” says “All of the criteria”. If this is chosen, all of the selected criteria must be met for the consumers to appear in the filtered list. If “At least one of the criteria” is chosen, the consumer must meet at least one of the selected criteria to appear in the 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.

The screenshot displays the Social Assistance Management System (SAMS) interface. The main window title is "Social Assistance Management System - [Consumers]". The menu bar includes File, Edit, View, Tools, and Window. The toolbar contains various icons for actions like Register, New, Open, Delete, Properties, Care Enrollments, Service History, Care Recipients, and Caregivers. The main area shows a list of consumers filtered by the last name "Aardvark". The list has columns for ID, Name, and Town of Residence. The "Filter" dialog box is open, showing the criteria used for filtering: Match Type is "All of the criteria", and the Consumer section is selected with "Last name is like" set to "Aardvark". Other sections like Care and Care Enrollments are also visible but not selected. The status bar at the bottom indicates "11 Items, 1 Selected (Filters Applied)".

ID	Name	Town of Residence
102443222	Aardvark, Aaron	Essex
101440022	Aardvark, Abel X	Essex Junction
101061111	Aardvark, Aloysius	
104356789	Aardvark, Anabelle Y	South Burlington
1304378909	Aardvark, Ann	Essex
101331933	Aardvark, April	
325605558	Aardvark, Helena	
101495432	Aardvark, Jean	Barre
325661111	Aardvark, John P	Adamant
1358631533	Aardvark, Julie A	
719565698	Aardvark, Terri	Arlington

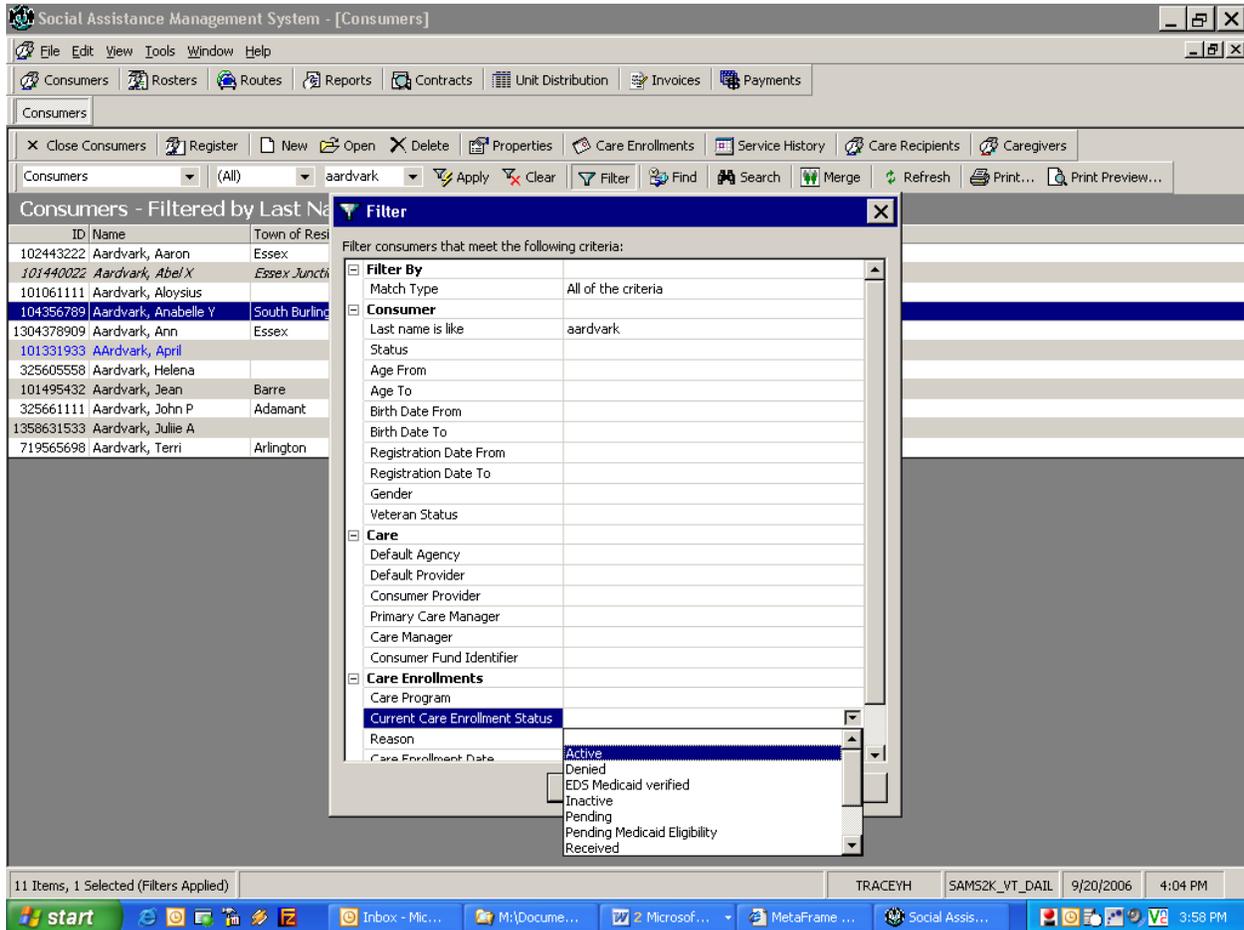
Filtering (by care program)

When clicking on the row to the right of “Care Program”, a drop down arrow will appear to the right of the row. 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) by clicking this arrow and choosing the specific program.



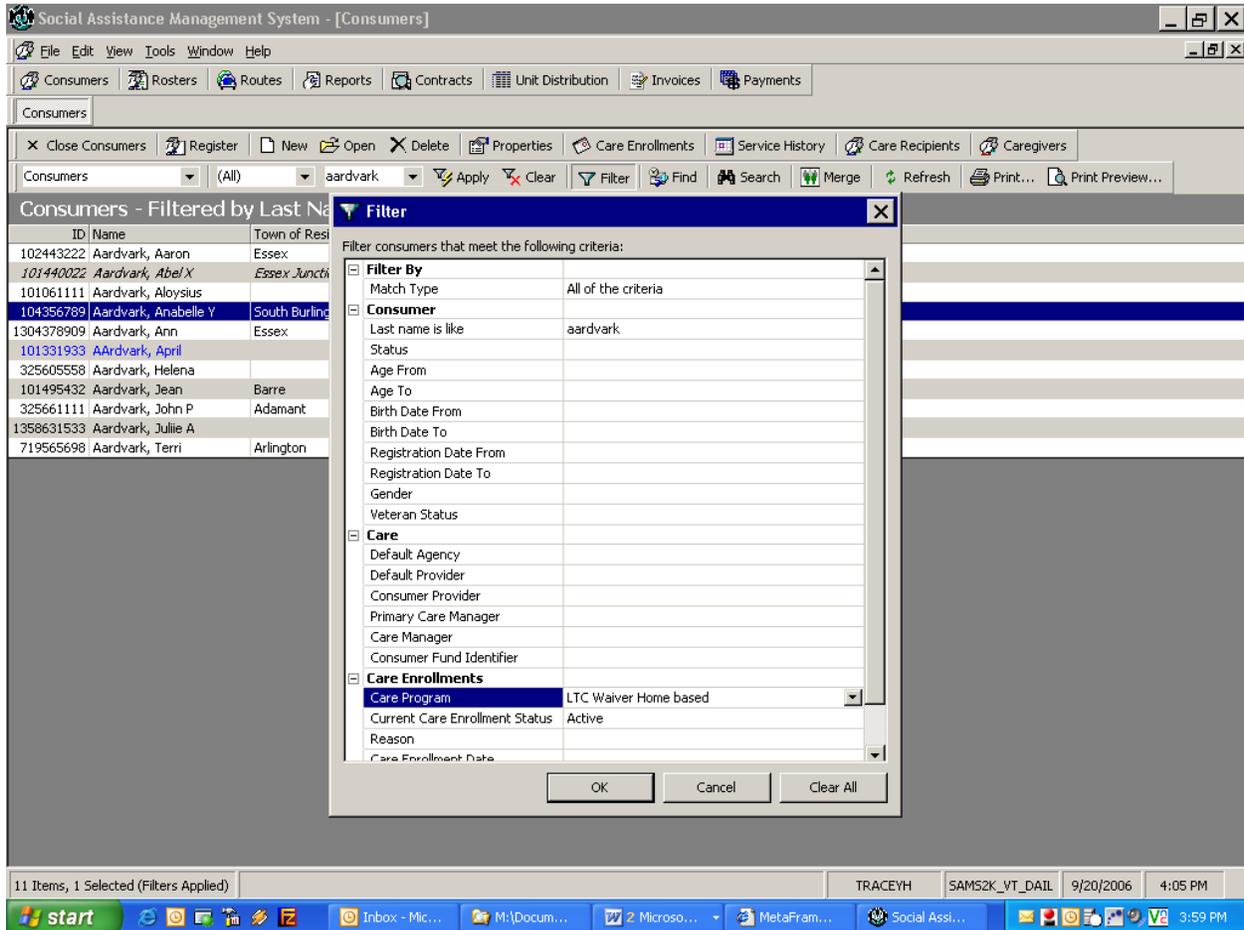
Filtering (by status)

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. Clicking in the Current Care Enrollment Status row will make a drop down arrow appear to the right of the row. Click the arrow to bring up the drop down list.



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.)

The screenshot displays the Social Assistance Management System interface. The title bar reads "Social Assistance Management System - [Consumers]". The menu bar includes File, Edit, View, Tools, Window, and Help. The main menu contains Consumers, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, and Payments. The Consumers menu is expanded, showing options like Close Consumers, Register, New, Open, Delete, Properties, Care Enrollments, Service History, Care Recipients, and Caregivers. Below the menu is a toolbar with buttons for Apply, Clear, Filter, Find, Search, Merge, Refresh, Print..., and Print Preview... The main area shows a table titled "Consumers - Filtered by 3 conditions". The table has the following data:

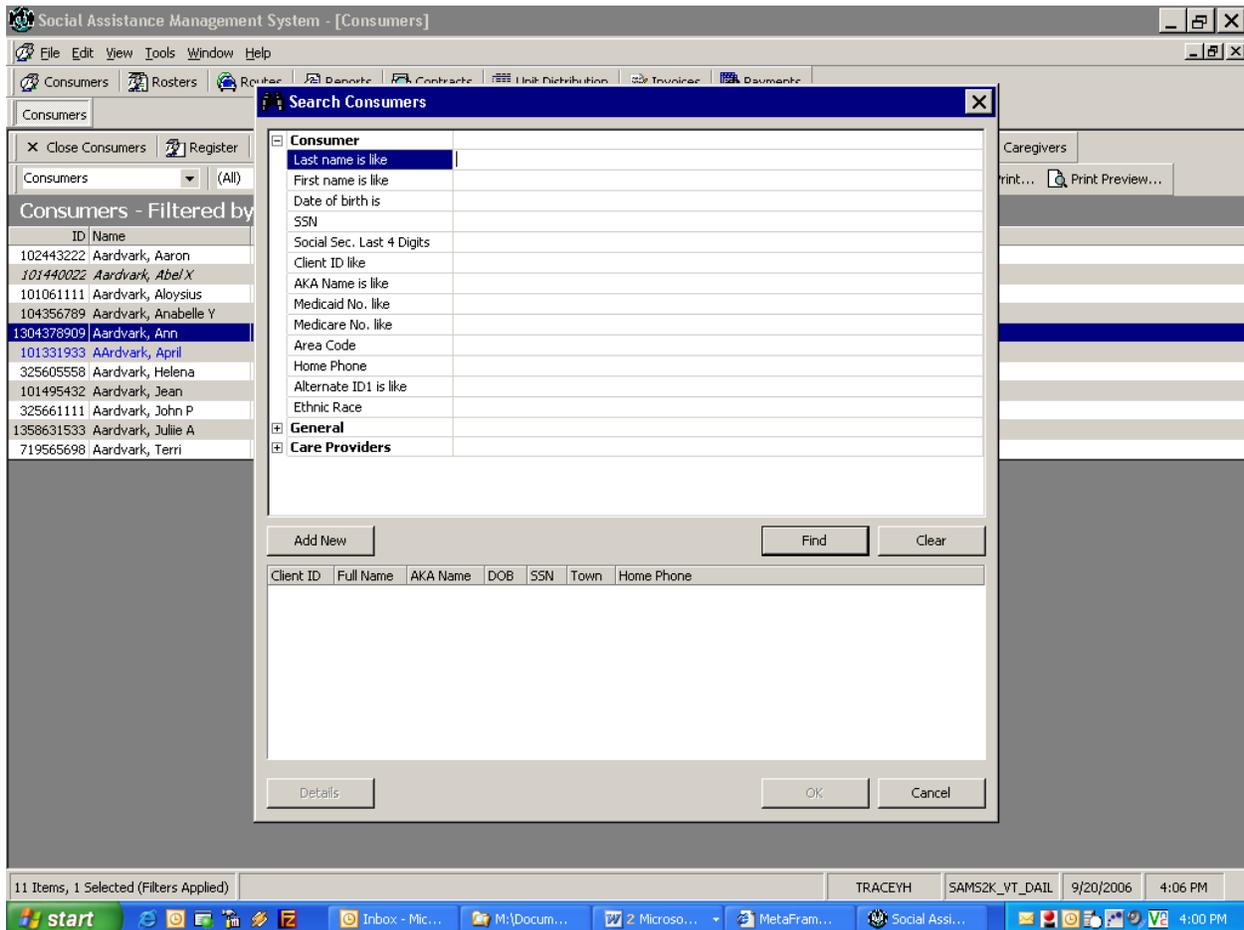
ID	Name	Town of Residence	Agency	Default Provider	Primary Care Manager
1304378909	Aardvark, Ann	Essex			Holly Blair

The status bar at the bottom indicates "1 Item, 1 Selected (Filters Applied)". The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock displaying 3:59 PM on 9/20/2006.

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. You can search by any of the search options or a combination of the options. For instance, if you enter the Last Name of Aardvark and the First name of Aaron, the only consumers the system will find must have both a first name of Aaron and a last name of Aardvark. You can also only enter part of a field. You could also type in "Aard" and SAMS would find those Consumers whose last names begin with the letters Aard.

(The consumer list below shows test data only.)

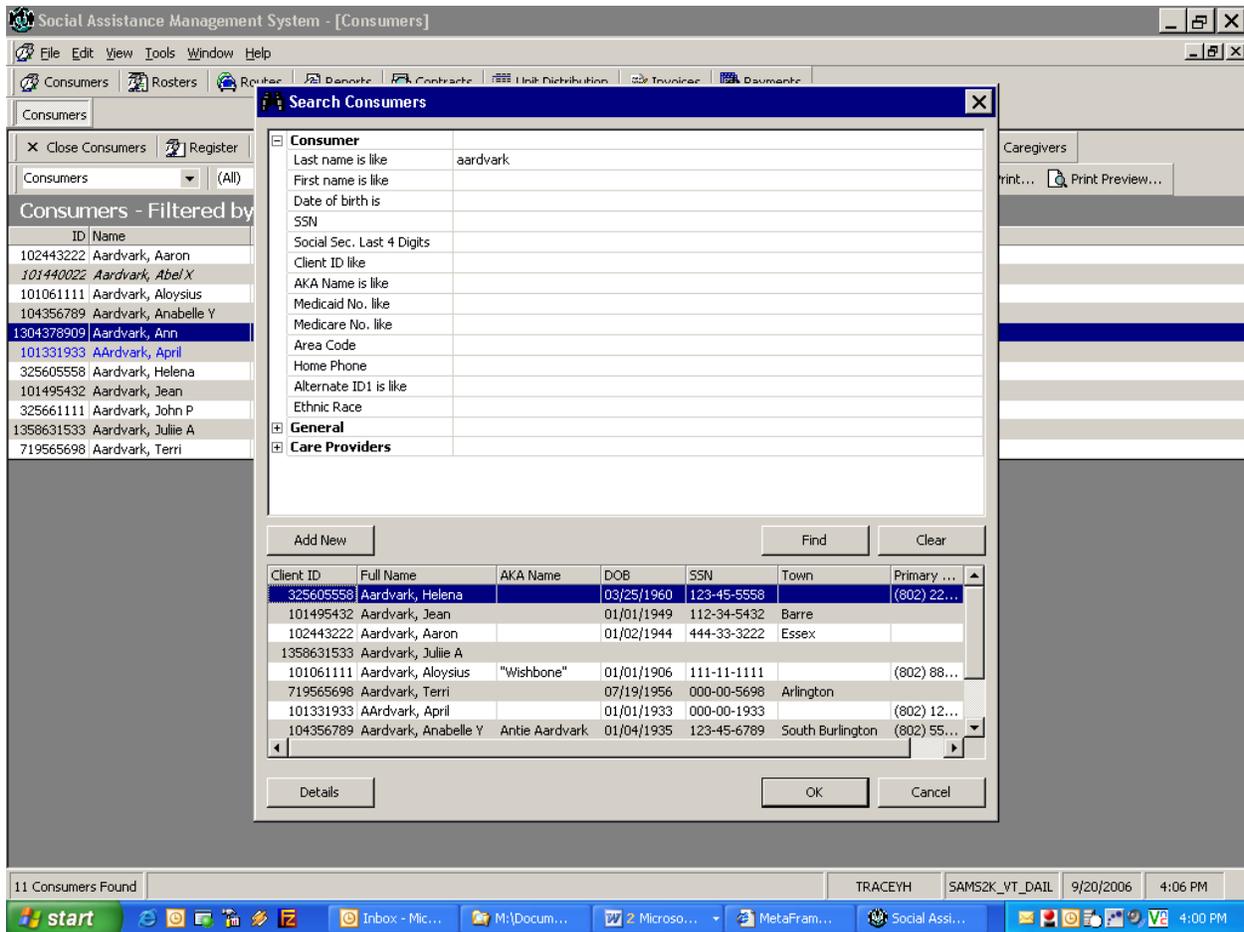


Search (by consumer name)

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.

2. Demographic Details on Individual Consumers

General Details on Consumer

After double clicking on the person's name, you will see a consumer record summary screen as shown below.

The screenshot shows the Social Assistance Management System (SAMS) interface. The title bar reads "Social Assistance Management System - [Aardvark, Anabelle Y - Consumer]". 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 displays the "Aardvark, Anabelle Y - Consumer Summary" screen. The summary includes the following information:

Personal	
Client ID	104356789
SSN	123-45-6789
Birth Date	01/04/1935
Age	71
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	Yes

Residential Address	
123 Main	
South Burlington, VT 05403	
County of Chittenden	
Municipality of Burlington DAIL Office	

Contacts	
Family/Relative:	Eugene Aardvark (no phone)

Notes: This is a test case

NAPIS	
Ethnicity	Not Hispanic or Latino
In Poverty	No
Lives Alone	No
High Nutritional Risk	Don't Know
Is Rural	Don't Know
Number of ADLs	6
Number of IADLs	8

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

Caregivers	
Aardvark, April	Other Elderly Relative

Care Recipients		
Start Date - End Date	Care Program	Cost
07/25/2006 - 07/24/2007	LTC Waiver Flexible Choices Highest	
04/16/2006 - 04/15/2007	LTC Waiver Nursing Home short-term Highest	
04/01/2006 - 03/31/2007	LTC Waiver PACE highest	\$6,000.00

Care Enrollment	
Primary Care Manager	Kara Artus
Default Provider	Not Specified
Default Agency	Not Specified

Actions: check on DOR for this client from Mary...

The bottom of the screen shows the Windows taskbar with the Start button, system tray, and taskbar icons. The system tray displays the user name TRACEYH, the date 9/20/2006, and the time 4:07 PM. The taskbar shows several open applications, including Social Assistance Management System.

The summary screen provides a quick overview of the consumer's details, including SSN, birth date, phone numbers, address, contacts and basic information on care enrollments and plans of care. Clicking on the "Details" button in the 'Contents' column on the left will bring up details for each section.

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
 - 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
 - Mailing Address
 - NAPIS
 - Status
 - Insurance
 - Other
 - Characteristics
 - CFC user fields

R=Home,N=NF,E=ERC,H=Hosp,C=Cor	
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

Contacts, Locations, Phones & Care Managers

After you click on the ‘Details’ button, the Details section for the consumer will appear, as shown below. The separate sections shown in the Summary page appear in a column to the right of the Contents column. Clicking on any of these sections will bring up a different screen with different information.

The General section will show general information on the consumer such as name, gender, birth date, SSN.

The Contacts section shows contact names for the consumer, the type of contact, the relationship of that contact to the consumer and the contact’s phone number and email address.

The Locations section lists known addresses for the consumer, whether the address is a residence or mailing address and what county and municipality in which the address is located.

The Phones section lists known phone numbers for the consumer and if the phone is a home, business, mobile, etc.

The Care Managers section lists all Care Managers (Case Managers) associated with this consumer.

CFC providers will be most interested in Care Enrollments discussed in the next section. This manual will not describe the complete contents of the Details section.

The screenshot displays the 'Social Assistance Management System - [Aardvark, Anabelle Y - Consumer]' window. The main content area is titled 'Aardvark, Anabelle Y - Details' and shows a table of personal information. The table has the following data:

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	

The interface also shows a navigation pane on the left with icons for Summary, Details, Assessments, Care Management, Service Orders, Service Delivery, Actions, and Journal. The top toolbar includes buttons for Close Consumer, Save, Save and Close, Print Consumer, and Print Preview Consumer. The bottom status bar shows the user 'TRACEYH', the system 'SAMS2K_VT_DAIL', the date '9/19/2006', and the time '1:07 PM'.

3. Care Enrollments for Individual Waiver Consumers Viewing Level of Care, Service Program & Care Program

To view a Care Enrollment (or Program Enrollment), double click on “Care Enrollment” in the column to the right of the ‘Contents’ column. This will show the Status, Status Date, Start Date, End Date, and Care Program, as shown below. Below, LTC Waiver home based highest is selected.

The screenshot displays the Social Assistance Management System interface for consumer Anabelle Y. The main window shows a table of care enrollments with the following data:

Status	Status Date	Start Date	End Date	Care Program
Active	07/25/2006	07/25/2006		LTC Waiver Flexible Choices Highest
Inactive	04/12/2006	04/12/2006		LTC Waiver Nursing Home short-term Highest
Inactive	04/01/2006	04/01/2006		LTC Waiver short term NH (VHAP-Medicaid) highest
Active	03/01/2006	03/01/2006		LTC Waiver home based highest
Inactive	03/01/2006	03/01/2006	03/10/2006	LTC Waiver Home based
Inactive	01/01/2006	01/01/2006		LTC Waiver PACE highest
Inactive	09/13/2005	09/13/2005		NAPIS - Title III
Inactive	08/01/2005	08/01/2005		LTC Waiver ERC Highest
Inactive	08/01/2005	08/01/2005		LTC Waiver Home based

The interface includes a sidebar with navigation options like Summary, Details, Assessments, Care Management, Service Orders, Service Delivery, Actions, and Journal. The bottom status bar shows 9 items, 1 selected, and the system time is 1:46 PM on 9/19/2006.

Double-click to select the Care Program of interest. In the screen below, LTC Waiver home based highest has been selected.

Level of Care indicates the consumer's CFC level of care (Highest, High, or Moderate)

Service Program indicates the care setting (Nursing Home, Home and Community Based (HCBS), ERC, etc.)

Care Program Name is a combination of the Level of Care and the Service Program.

This screen also includes other information of interest: Application Date, Received Date of the application, Status, Status Reason, Status Date, Start Date, End Date, and Termination Date. These are defined on the following page.

The screenshot displays the Social Assistance Management System (SAMS) interface for a consumer named Anabelle Y. The main window shows a list of care enrollments with columns for Status, Status Date, Start Date, End Date, and Care Program. The 'Edit Care Enrollment' dialog box is open, showing details for a specific enrollment. The dialog box contains the following information:

Details:	
Level of Care	LTC Waiver Highest (Choices for Care)
Service Program	LTC Waiver HCBS (Choices for Care)
Care Program Name	LTC Waiver home based highest
Co-Pay Type	Dollars
Consumer Co-Pay	0.00
Application Date	03/01/2006
Received Date	03/01/2006
Termination Date	
Status	Active
Reason	
Status Date	03/01/2006
Start Date	03/01/2006
End Date	

The background window shows the 'Aardvark, Anabelle Y - Details' section with a table of care enrollments:

Status	Status Date	Start Date	End Date	Care Program
Active	07/25/2006	07/25/2006		LTC Waiver Flexible Choices Highest
				Short-term Highest
				Medicaid (highest)

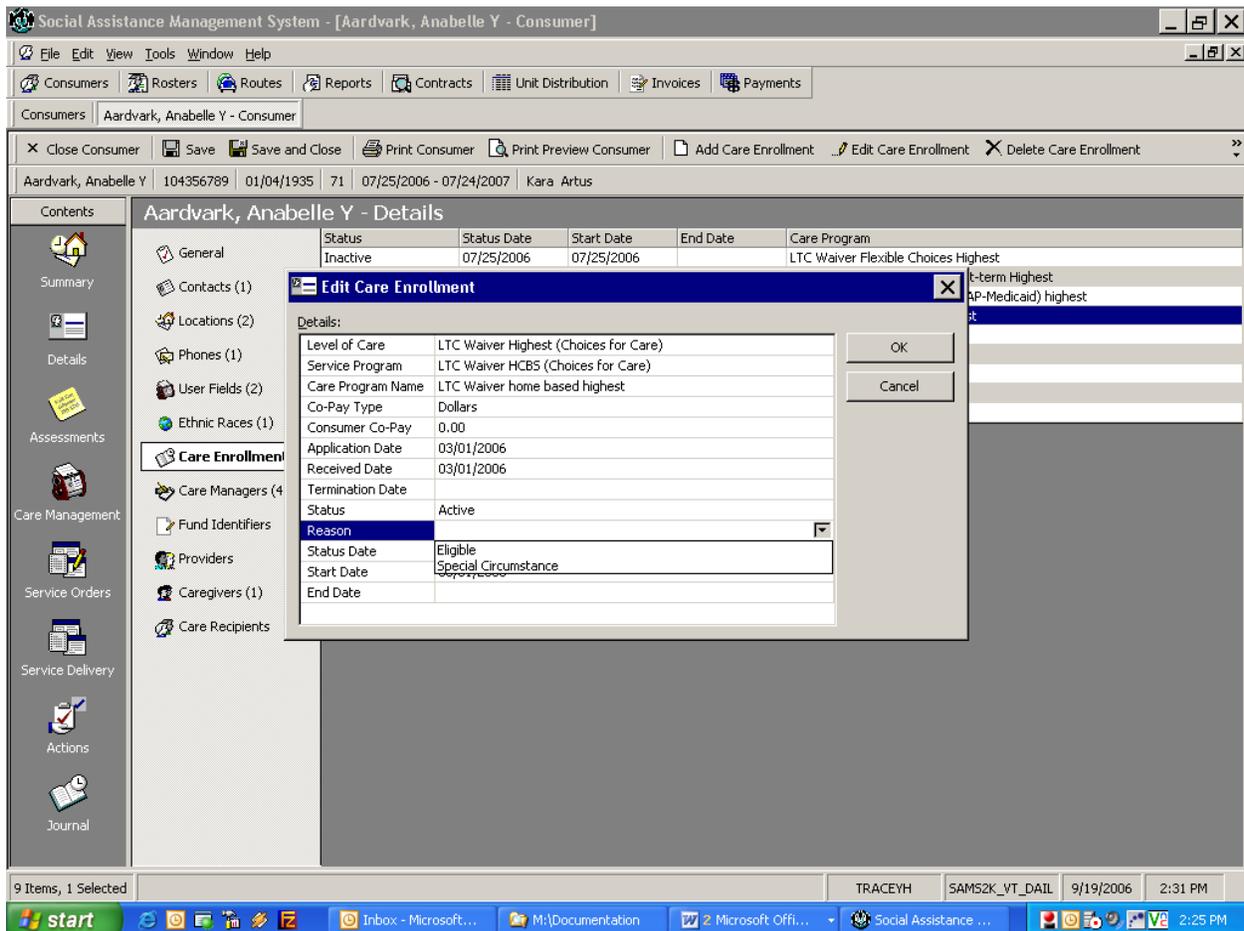
Dates on Care Enrollment

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 that a consumer is terminated (or 'disenrolled') from a care program (e.g, a change in setting or level of care, voluntary withdrawal, move to another state, death).
- Status Date: The date of the current Status. (i.e. If the Status is 'Active', this date is when the consumer became active).
- Start Date: The date that Care Enrollment and services begin.
- End Date: The date that Care Enrollment and services end. This field is usually 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



4. Consumer Plan of Care & Service Plan Care Management/Care Plan

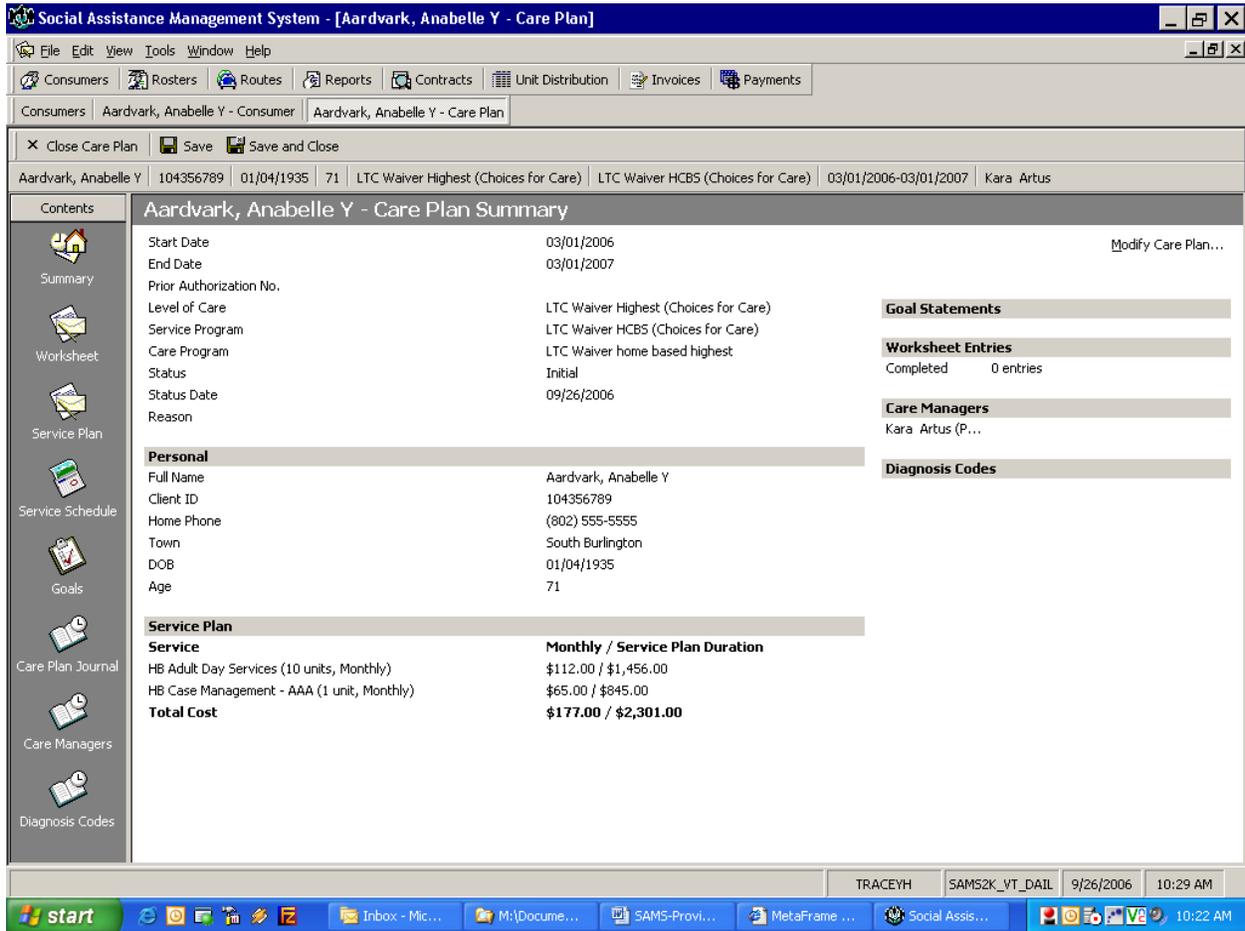
Click on Care Management in the Contents column to open the Plan of Care screen. This screen, as shown below, provides a variety of information for each Plan of Care: Start Date, End Date, Total Cost, Care Program, Primary Care Manager, Status, and Reason. Note that if a consumer's Care Enrollment is in a Received, Waiting or Pending Medicaid Eligibility status, there will not be a Plan of Care.

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

Start Date	End Date	Total Cost	Care Program	Primary Care Manager	Status	Reason
04/22/2006	04/20/2007	\$55,476.85	LTC Waiver short term NH (VHAP-Medicaid) highest	Carol m Barry	Inactive	initial e...
04/16/2006	04/15/2007	\$39,007.93	LTC Waiver Nursing Home short-term Highest		Active	Reasse...
04/01/2006	03/31/2007	\$6,000.00	LTC Waiver PACE highest	Carol m Barry	Active	Change
03/01/2006	03/01/2007	\$0.00	LTC Waiver home based highest	Kara Artus	Initial	
01/01/2006	12/31/2006	\$6,000.00	LTC Waiver PACE highest	Alice M Pitts	Initial	
07/25/2006	09/01/2006	\$9,000.00	LTC Waiver Flexible Choices Highest	Kara Artus	Inactive	
04/01/2006	04/21/2006	\$140.84	LTC Waiver short term NH (VHAP-Medicaid) highest	Carol m Barry	Inactive	reasse...
04/12/2006	04/15/2006	\$0.00	LTC Waiver Nursing Home short-term Highest	Carol m Barry	Inactive	chang...
10/01/2005	11/08/2005	\$94.00	LTC Waiver ERC Highest	Dagny m Reimondi	Inactive	
08/01/2005	09/30/2005	\$94.00	LTC Waiver ERC Highest	Dagny m Reimondi	Inactive	

The interface also includes a sidebar with navigation options: Summary, Details, Assessments, Care Management, Service Orders, Service Delivery, Actions, and Journal. The bottom status bar shows '10 Items, 1 Selected' and the system clock is '10:15 AM'.

Double Click a single Plan of Care to view a summary of that specific plan, as shown in the screen below. Note the Service Plan listing in the lower left corner. This is where the individual services the consumer receives under the Plan of Care will be listed.



Plan of Care Status & Reasons

Each Plan of Care has its own Status and Reason, which are related. See the table below for details.

Status	Reasons
Active	Change – Change to existing Care Enrollment. Initial - First Plan of Care for Care Enrollment
Change	n/a
Inactive	Change Ended, Initial Ended, Reassessment Ended
Initial	n/a
Reassessment	n/a
Temporary	n/a

Service Plan Details

The Service Plan details may be viewed in two ways:

1. From the Plan of Care listing, highlight the Plan of Care and click 'Service Plan' in the Contents column on the right.
2. From the summary of the Plan of Care, as shown below, click on the 'Service Plan' heading above the service listing.

Social Assistance Management System - [Aardvark, Anabelle Y - Care Plan]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Anabelle Y - Consumer Aardvark, Anabelle Y - Care Plan

Close Care Plan Save Save and Close

Aardvark, Anabelle Y 104356789 01/04/1935 71 LTC Waiver Highest (Choices for Care) LTC Waiver HCBS (Choices for Care) 03/01/2006-03/01/2007 Kara Artus

Contents

Aardvark, Anabelle Y - Care Plan Summary

Start Date 03/01/2006 [Modify Care Plan...](#)
 End Date 03/01/2007
 Prior Authorization No.
 Level of Care LTC Waiver Highest (Choices for Care)
 Service Program LTC Waiver HCBS (Choices for Care)
 Care Program LTC Waiver home based highest
 Status Initial
 Status Date 09/26/2006
 Reason

Goal Statements

Worksheet Entries
 Completed 0 entries

Care Managers
 Kara Artus (P...)

Diagnosis Codes

Personal

Full Name Aardvark, Anabelle Y
 Client ID 104356789
 Home Phone (802) 555-5555
 Town South Burlington
 DOB 01/04/1935
 Age 71

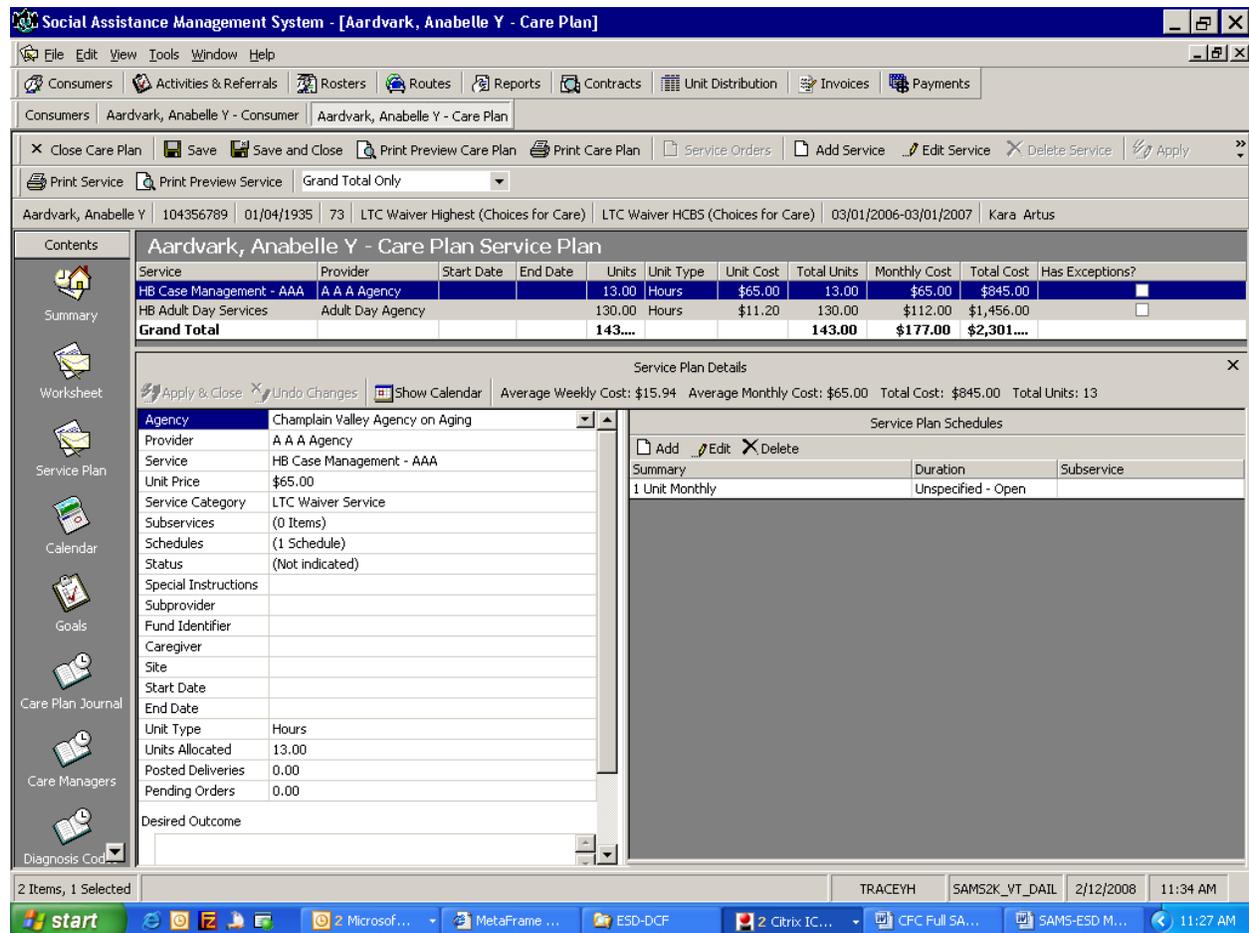
Service Plan

Service	Monthly / Service Plan Duration
HB Adult Day Services (10 units, Monthly)	\$112.00 / \$1,456.00
HB Case Management - AAA (1 unit, Monthly)	\$65.00 / \$845.00
Total Cost	\$177.00 / \$2,301.00

TRACEYH SAMS2K_VT_DAIL 9/26/2006 10:29 AM

start | Inboxes - Mic... | M:\Docume... | SAMS-Provi... | MetaFrame ... | Social Assis... | 10:22 AM

Entering into the Services as described previously, the top portion of the screen contains a summary of each service. To view the details of a Service Plan, it is necessary to double click the service in the service listing. Once this is done, the below screen shown appears containing the details on the lower portion of the screen.



This screen includes the following pertinent information:

Allocation type	Refers to the time frame for the service allocation. In other words, this is the timeframe the unit allocation refers to. This is directly related to the Units field.
Units:	The number of the Unit Type allocated to the consumer within the Allocation Type.
Unit Price:	Cost of each Unit Type specific to the Provider.
Agency:	Organizational unit governing over a single or multiple providers.
Provider:	Person or organization providing services to a consumer. The Provider may be the same as the Agency in cases such as nursing homes.

5. Private-Pay/Non-Waiver Consumers

Adding a Consumer

The first step before adding a new consumer is to Search to see if that consumer is already present in the database. Follow the steps outlined in the first topic “Finding/Searching for Individual Consumers” to search for the consumer in question. If the person already exists, review the information and proceed with the next steps. If the person does not exist in the database, follow these steps to add the consumers.

While on the Consumer Listing screen, click New on the toolbar. The following screen will appear. Enter the information requested. When entering the mailing address, you have the option of making it the same as the residential, or choosing a different address. If they are the same, choose ‘Yes’ for the “Same as Residential” question. This will cause the mailing address to automatically populate with the residential address information.

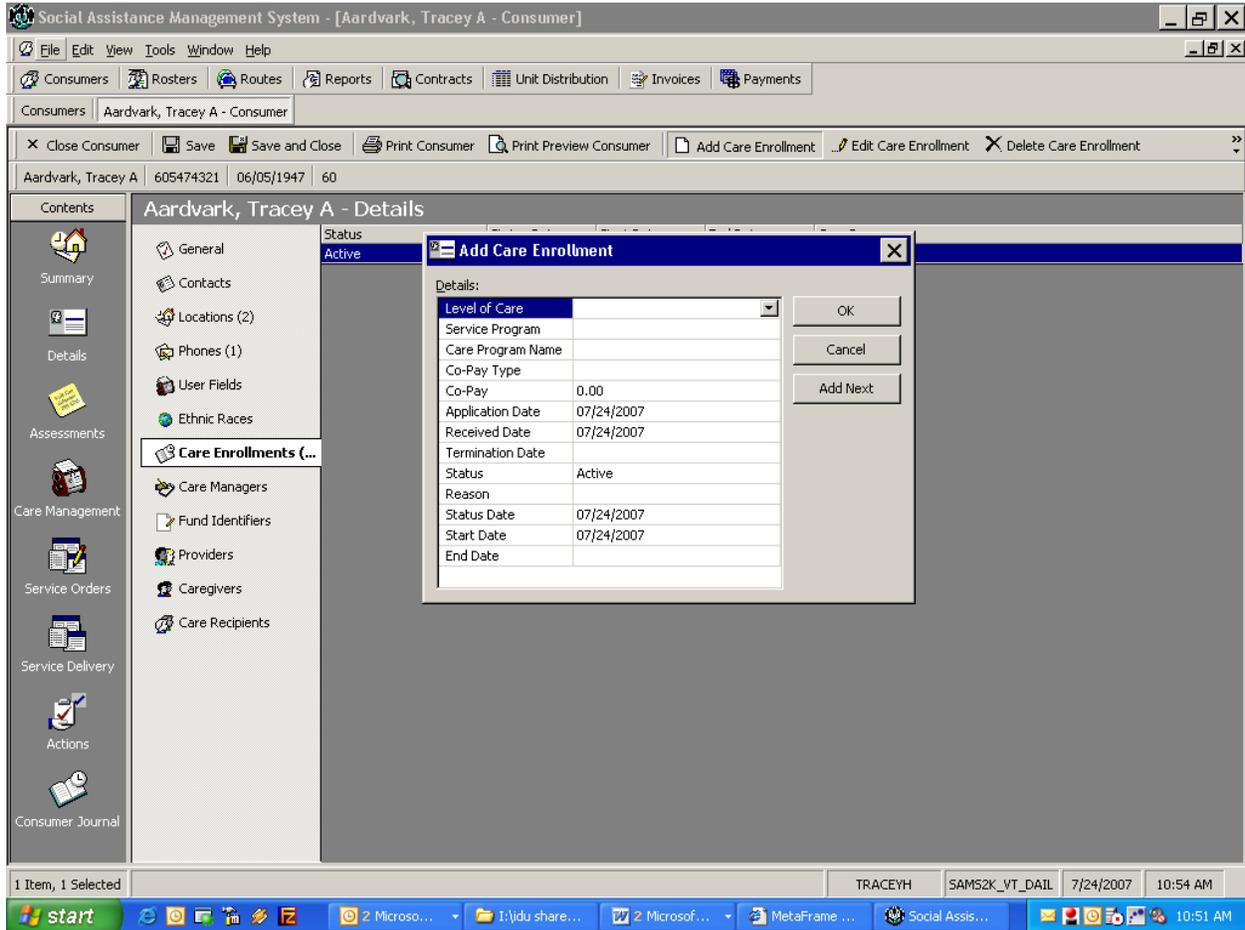
The screenshot shows the 'Social Assistance Management System - [Aardvark, Tracey A - Consumer]' window. The main content area is titled 'Aardvark, Tracey A - Details' and contains a table with the following data:

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	123-45-6789
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	
Directions To Home	
Mailing Address	
Same As Residential	Yes
Street 1	No
Street 2	Yes

The status bar at the bottom of the window displays: TRACEYH | SAMS2K_VT_DAIL | 7/24/2007 | 10:37 AM

Adding Private Pay/Non-Waiver Care Enrollment

Once the consumer information is added, you can begin entering the Enrollment. Click on Care Enrollments under the Details section and then click Add Care Enrollment from the toolbar. You will then see the following screen:



If the Consumer is on ACCS, the Level of Care will be Other State and Federal. The Service Program will be ACCS. If the consumer is an Adult Day Private Pay person, choose Private Pay for the Level of Care and Adult Day Private Pay for the Service Program. The Care Program Name will automatically populate based on what was chosen for the Level of Care and Service Program.

Details:	
Level of Care	Private Pay
Service Program	Adult Day Private pay
Care Program Name	Adult Day Private pay
Co-Pay Type	
Co-Pay	0.00
Application Date	07/24/2007
Received Date	07/24/2007
Termination Date	
Status	Active
Reason	
Status Date	07/24/2007
Start Date	07/24/2007
End Date	

Dates on Care Enrollment

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

- Application Date: This date the application was signed by the consumer.
- Received Date: The date that application was received by your organization.
- Termination Date: This date that a consumer is terminated (or 'disenrolled') from a care program (e.g, a change in setting or level of care, voluntary withdrawal, move to another state, death).
- Status Date: This is the date of the current Status. (i.e. If the Status is 'Active', this date is when the consumer became active)..
- Start Date: The date that Care Enrollment and services begin.
- End Date: The date that Care Enrollment and services end. This field is usually 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.

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		NAPIS	
Client ID	104356789	Ethnicity	Not Hispanic or Latino
SSN	123-45-6789	In Poverty	No
Birth Date	01/04/1935	Lives Alone	Yes
Age	73	High Nutritional Risk	Yes
Gender	Female	Is Rural	Don't Know
Marital Status	Married	Number of ADLs	4
AKA Name	Antie Aardvark	Number of IADLs	8
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		Ethnic Races	
10/14/2005	VT DAIL CFC transitional service plan	Non-Minority (White, non-Hispanic)	American
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		
		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

start | Inboxes - 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.

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

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"/>		02/04/2006	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		

7 Items, 1 Selected

TRACEYH SAMS2K_VT_DAIL 2/12/2008 9:54 AM

start | Inboxes - Micros... | MetaFrame Pr... | SAMS Docume... | Citrix ICA C... | CFC Full SAMS ... | 9:47 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"/>		02/01/2006	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

Subject: []

Action: []

Agency: []

Provider: []

Subprovider: []

Services: []

Care Program: []

Site: []

Status: Not Started

Reason: []

Status Date: 02/12/2008

Comments: []

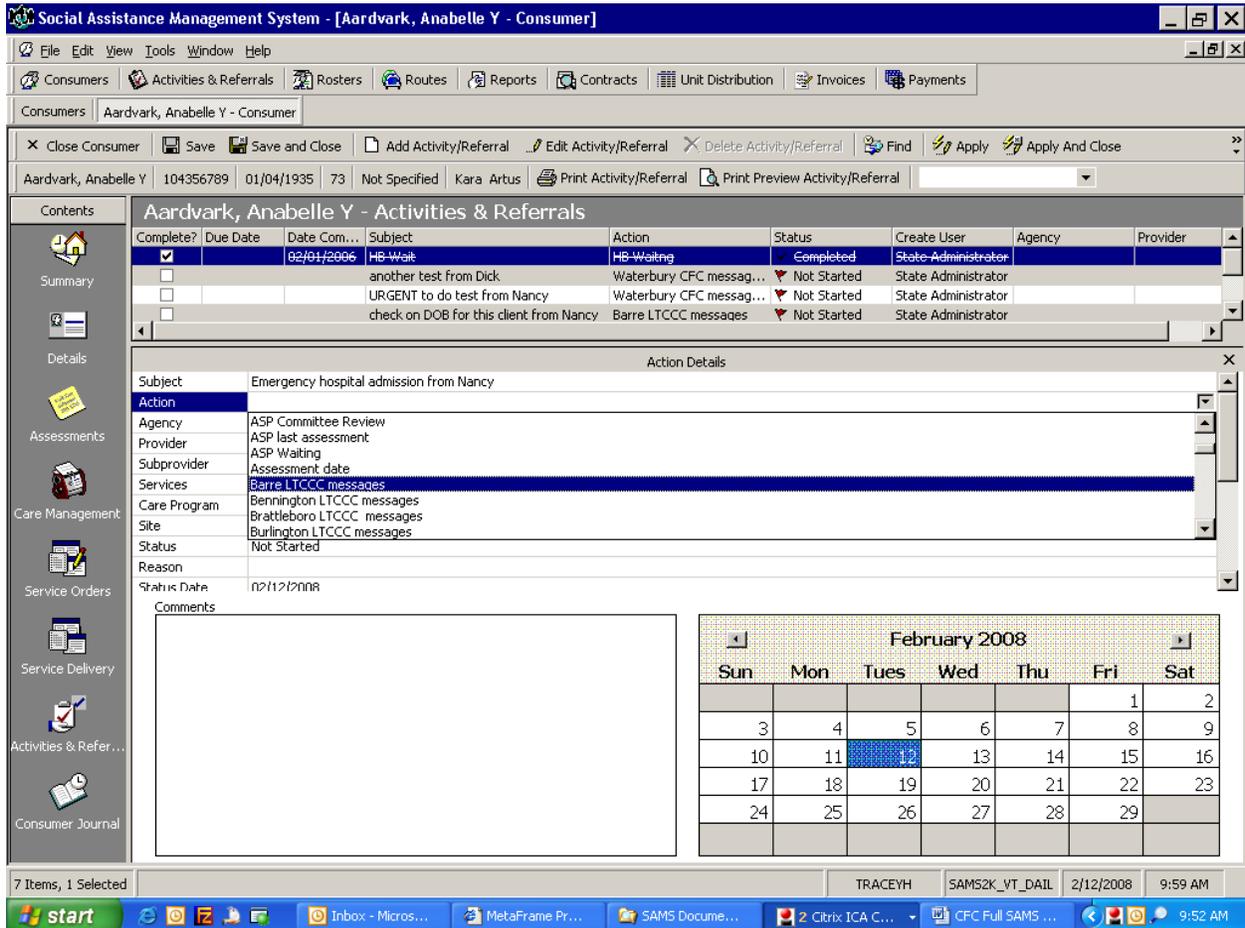
Sun	Mon	Tues	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	

7 Items, 1 Selected

TRACEYH SAMS2K_VT_DAIL 2/12/2008 9:57 AM

start | Inboxes - Micros... | MetaFrame Pr... | SAMS Docume... | 2 Citrix ICA C... | CFC Full SAMS... | 9:50 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.



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.

The screenshot displays the SAMS interface for consumer Anabelle Y. The main window shows a table of activities and referrals. The first entry, 'HB Wait', is marked as 'Completed' with a status of 'Completed' and a date completed of '02/01/2006'. Other entries are marked as 'Not Started'.

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		

The 'Action Details' window for the 'HB Wait' entry shows the following information:

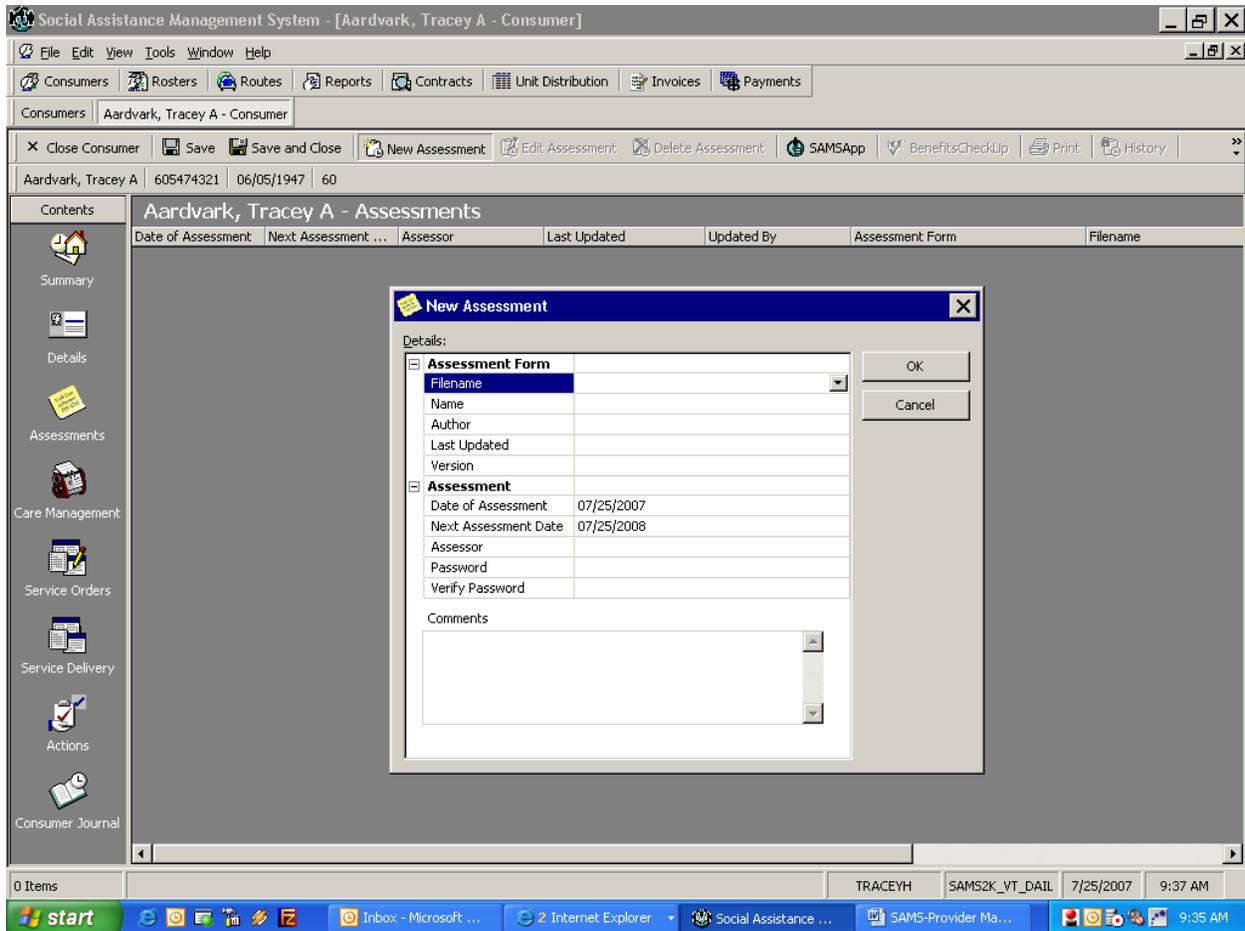
- Site: (blank)
- Status: Completed
- Reason: (blank)
- Status Date: 02/01/2006
- Due Date: (blank)
- Start Date: 10/01/2005
- Start Time: (blank)
- Date Completed: 02/01/2006
- Time Completed: (blank)
- Follow-Up Status: Not Required
- Follow-Up In Date: (blank)

A calendar for February 2008 is also visible, with the date 12th highlighted.

7. 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.



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.

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. If you enter a password and forget it, there will be NO way to access the information in the future.**

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

Assessment	
Date of Assessment	07/25/2007
Next Assessment Date	07/25/2008
Assessor	Tracey Harrington
Password	
Verify Password	

Comments

OK

Cancel

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.

The screenshot shows the Social Assistance Management System (SAMS) interface. 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]". The left sidebar shows a tree view with sections: VT DAIL AD Intake, 0. Cover Sheet, A. INDIVIDUAL IDENTIFICATION (selected), 1. Intake, 4. Emotional/Behavior/Cognitive Status, 5. Health Assessment, 6. Functional Assessment, and Narrative. The main area displays the "O.A. INDIVIDUAL IDENTIFICATION" section with the following questions and answers:

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.	10c. Enter the client's mailing state.
11.b. residential city or town.	South Burlington
11.c. Client's state of residence.	VT

The status bar at the bottom shows "1 Item, 1 Selected", "TRACEYH", "SAMS2K_VT_DAIL", "7/25/2007", and "1:18 PM".

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.

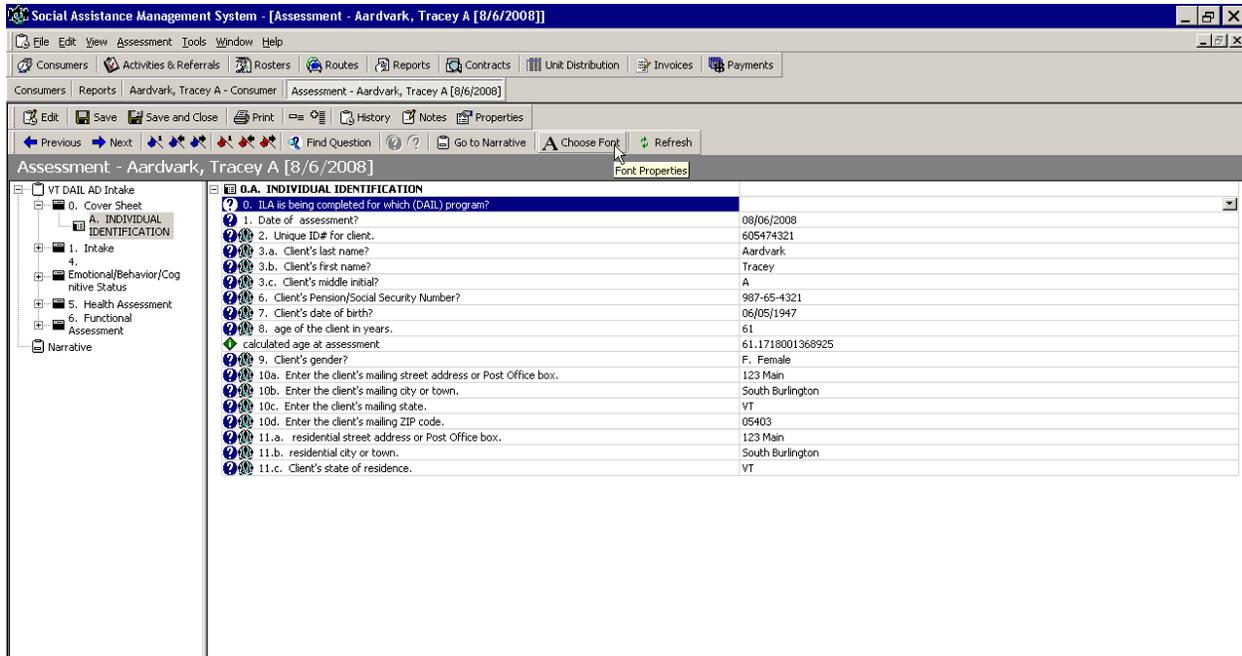
If you click on the right hand section, all the questions in the form will be shown in the right hand area. You can go down sequentially through these questions using the down arrow on the keyboard or go back up with the up arrow.

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.

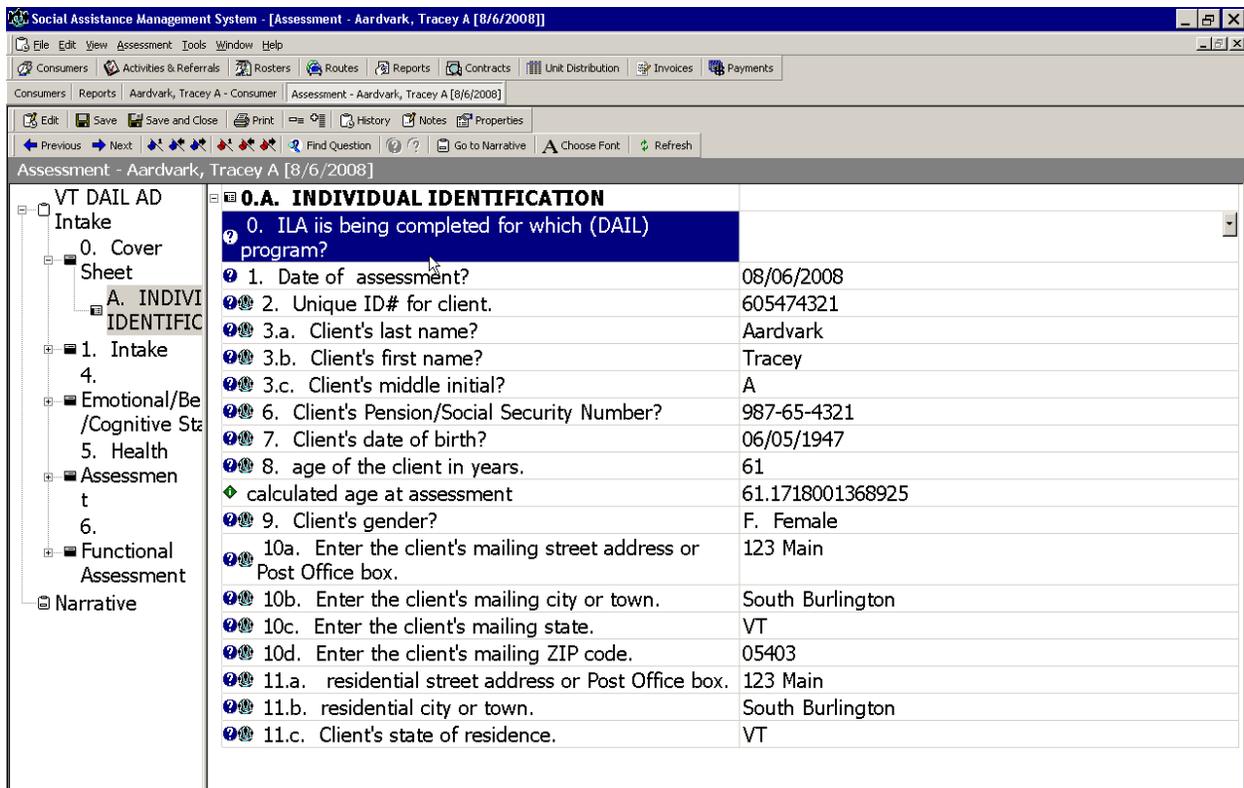
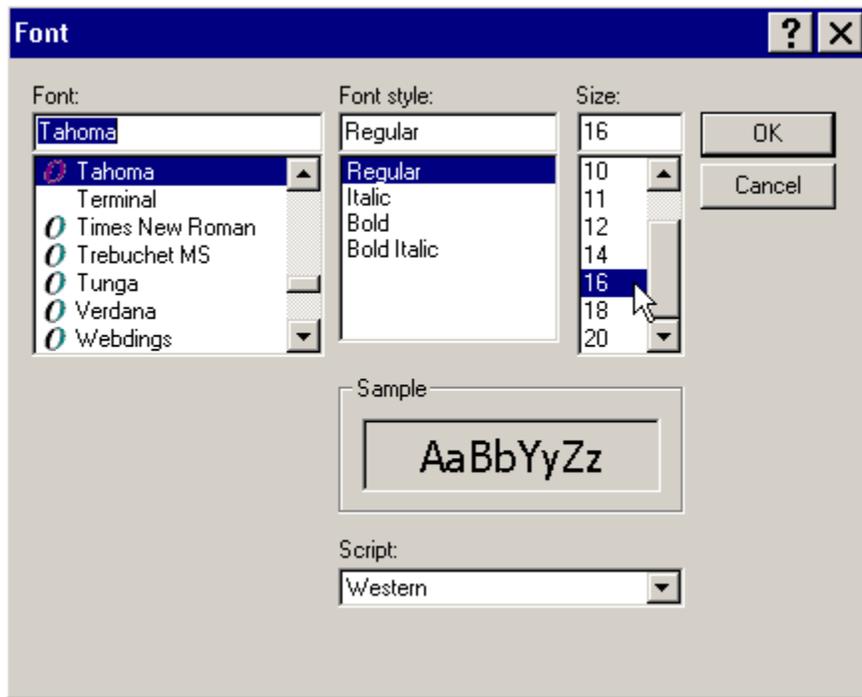
Skip functions are built in so that some questions will be skipped if they are not relevant based on a previous answer. For example if someone says they do not have a legal guardian the questions asking about the name of the guardian will be skipped. However, the system will still allow the user to go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

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 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:

The screenshot shows the 'Social Assistance Management System' interface. The title bar indicates the current assessment is for 'Aardvark, Tracey A' on 7/25/2007. The menu bar includes File, Edit, View, Assessment, Tools, and Window. The main toolbar contains various icons for navigation and editing. The left sidebar shows a tree view of the assessment sections, with '0. Cover Sheet' and 'A. INDIVIDUAL IDENTIFICATION' expanded. The main window displays a list of questions with their corresponding answers. The question '3.a. Client's last name?' is highlighted, with the answer 'Aardvark' entered in the adjacent field.

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

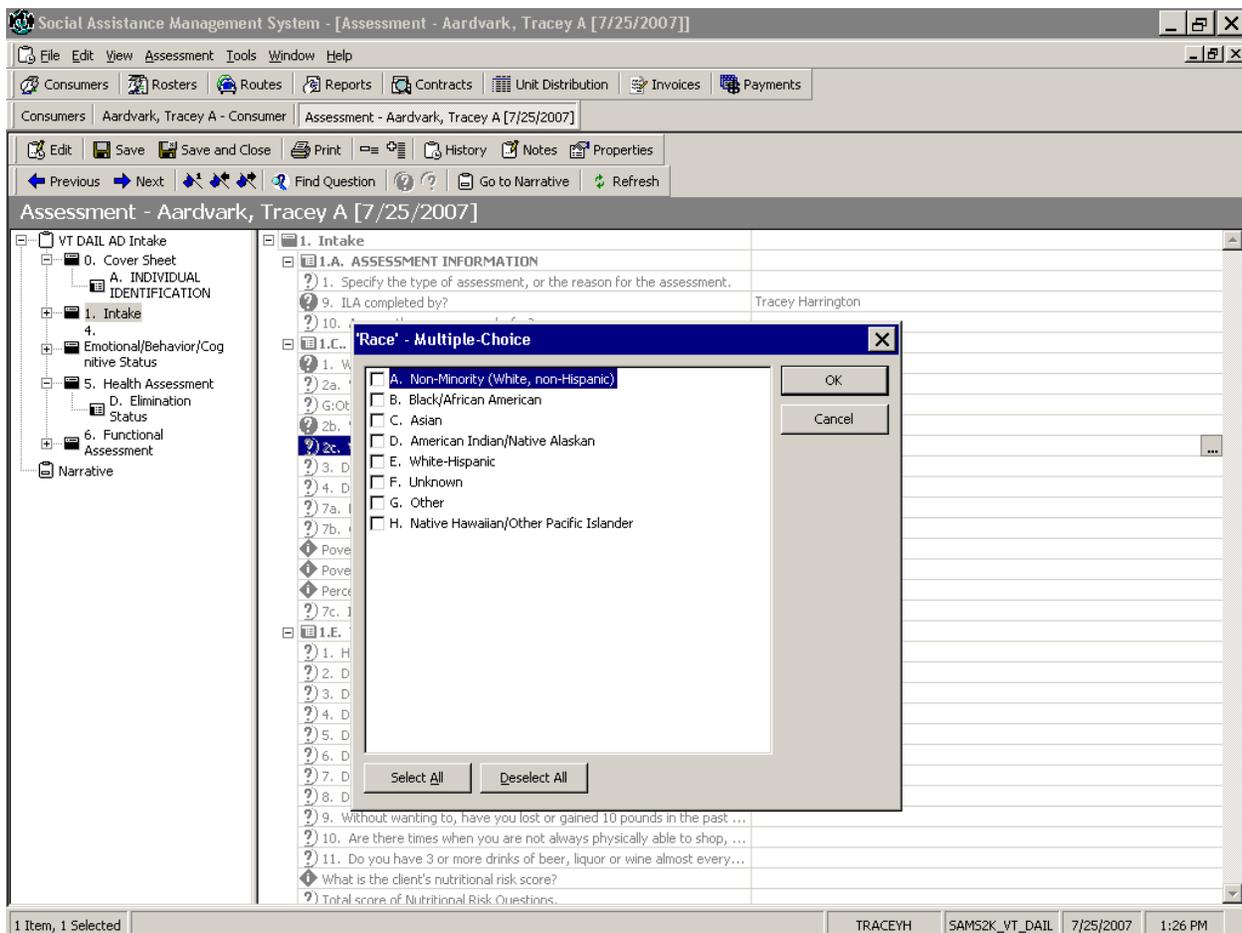
Multiple choice answers will have “...” in a box at the end of the highlighted question line. When you click this box, or simply press the space bar, the choice list will appear. See below for an example.

The screenshot shows the Social Assistance Management System interface for an assessment of Tracey A. Harrington on 7/25/2007. The interface includes a menu bar (File, Edit, View, Assessment, Tools, Window, Help), a toolbar with icons for Consumers, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, and Payments, and a navigation bar with buttons for Edit, Save, Save and Close, Print, History, Notes, Properties, Previous, Next, Find Question, Go to Narrative, and Refresh.

The main window displays the assessment structure on the left and the assessment content on the right. The assessment content is organized into sections:

- 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 in? 2c. What is the client's race? Choose multiple.
 - 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.

The status bar at the bottom indicates "1 Item, 1 Selected", "TRACEYH", "SAM52K_VT_DAIL", "7/25/2007", and "1:25 PM".



To enter a choices, 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:

The screenshot displays the Social Assistance Management System interface for an assessment titled "Assessment - Aardvark, Tracey A [7/25/2007]". The main window shows a tree view on the left with sections like "VT DAIL AD Intake", "0. Cover Sheet", "A. INDIVIDUAL IDENTIFICATION", "1. Intake", "4. Emotional/Behavior/Cognitive Status", "5. Health Assessment", "D. Elimination Status", "6. Functional Assessment", and "Narrative". The main content area shows a list of questions, with question 1.C. "Race" - Multiple-Choice selected. A dialog box is open over this question, listing eight options: A. Non-Minority (White, non-Hispanic), B. Black/African American (checked), C. Asian (checked), D. American Indian/Native Alaskan, E. White-Hispanic, F. Unknown, G. Other, and H. Native Hawaiian/Other Pacific Islander. The dialog box has "OK" and "Cancel" buttons, and "Select All" and "Deselect All" buttons at the bottom. The status bar at the bottom indicates "1 Item, 1 Selected" and shows the user "TRACEYH", the assessment "SAMS2K_VT_DAIL", the date "7/25/2007", and the time "1:27 PM".

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:

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
 - D. Elimination Status
 - 6. Functional Assessment
 - Narrative

1. Intake

1.A. ASSESSMENT INFORMATION

1. Specify the type of assessment, or the reason for the assessment. Tracey Harrington

9. IIA completed by?

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.

1 Item, 1 Selected

TRACEYH SAMS2K_VT_DAIL 7/25/2007 1:28 PM

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 displays the SAMS application window. 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. Below the menu is a toolbar with icons for Consumers, Rosters, Routes, Reports, Contracts, Unit Distribution, Invoices, and Payments. A secondary toolbar contains Edit, Save, Save and Close, Print, History, Notes, and Properties. The main window title is "Assessment - Aardvark, Tracey A [7/25/2007]".

The left sidebar shows a tree view with the following structure:

- VT DAIL AD Intake
 - 0. Cover Sheet
 - A. INDIVIDUAL IDENTIFICATION (selected)
 - 1. Intake
 - 4. Emotional/Behavior/Cognitive Status
 - 5. Health Assessment
 - 6. Functional Assessment
 - Narrative

The main content area shows the "0.A. INDIVIDUAL IDENTIFICATION" section with a list of questions and their corresponding values:

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

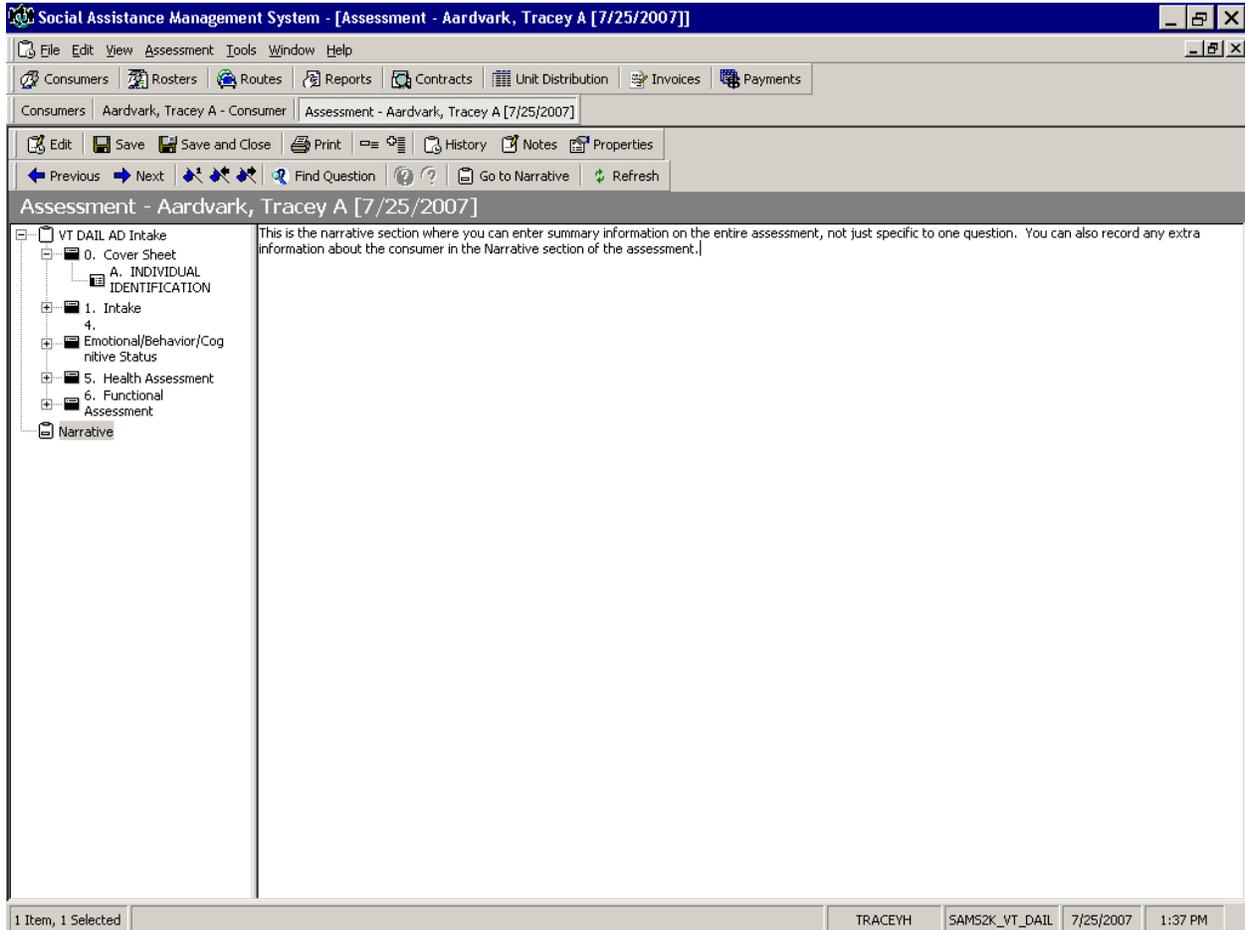
Below the question list, a text area contains the following note:

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.

The status bar at the bottom shows "1 Item, 1 Selected", "TRACEYH", "SAMS2K_VT_DAIL", "7/25/2007", and "1:35 PM".

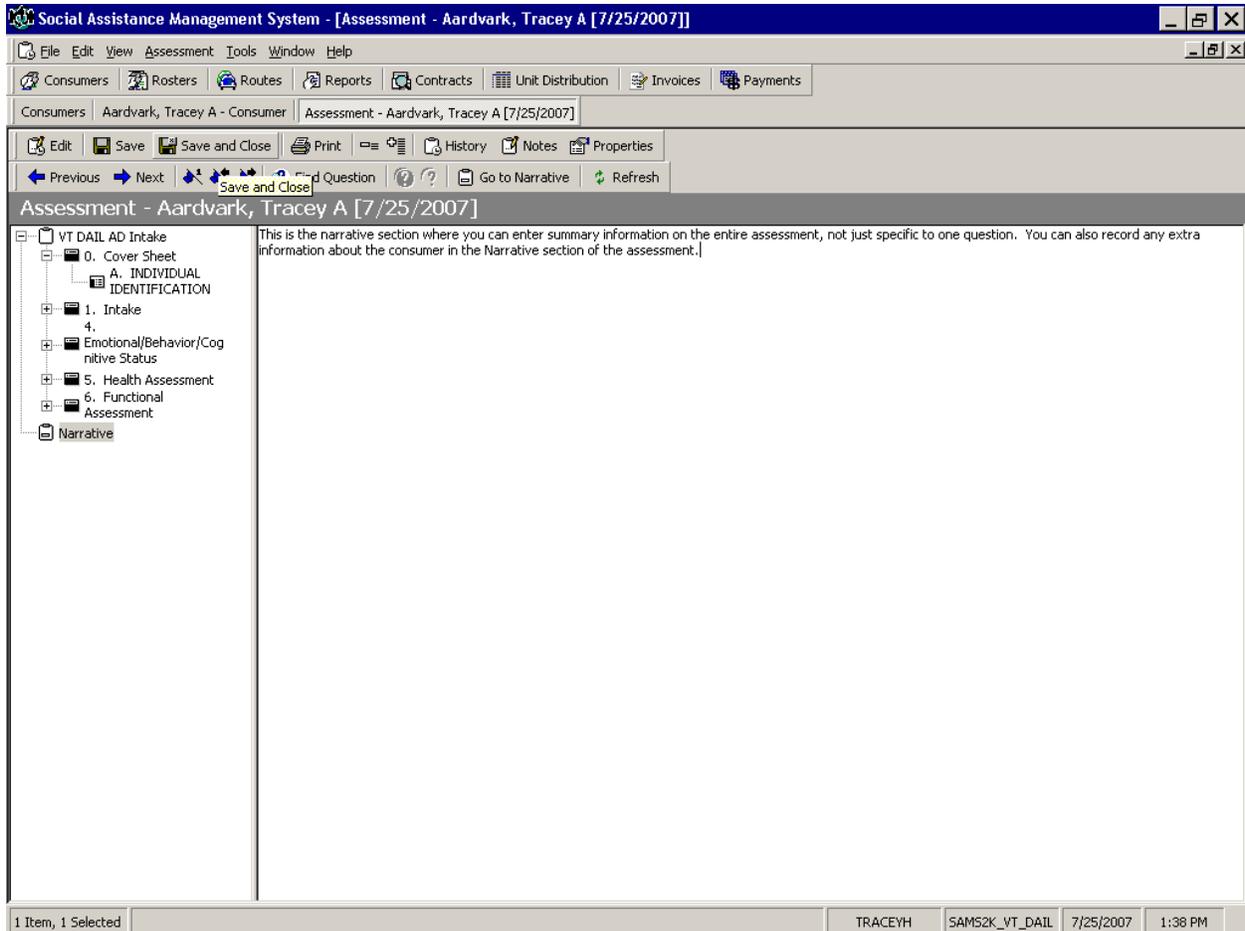
Using Narrative

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:

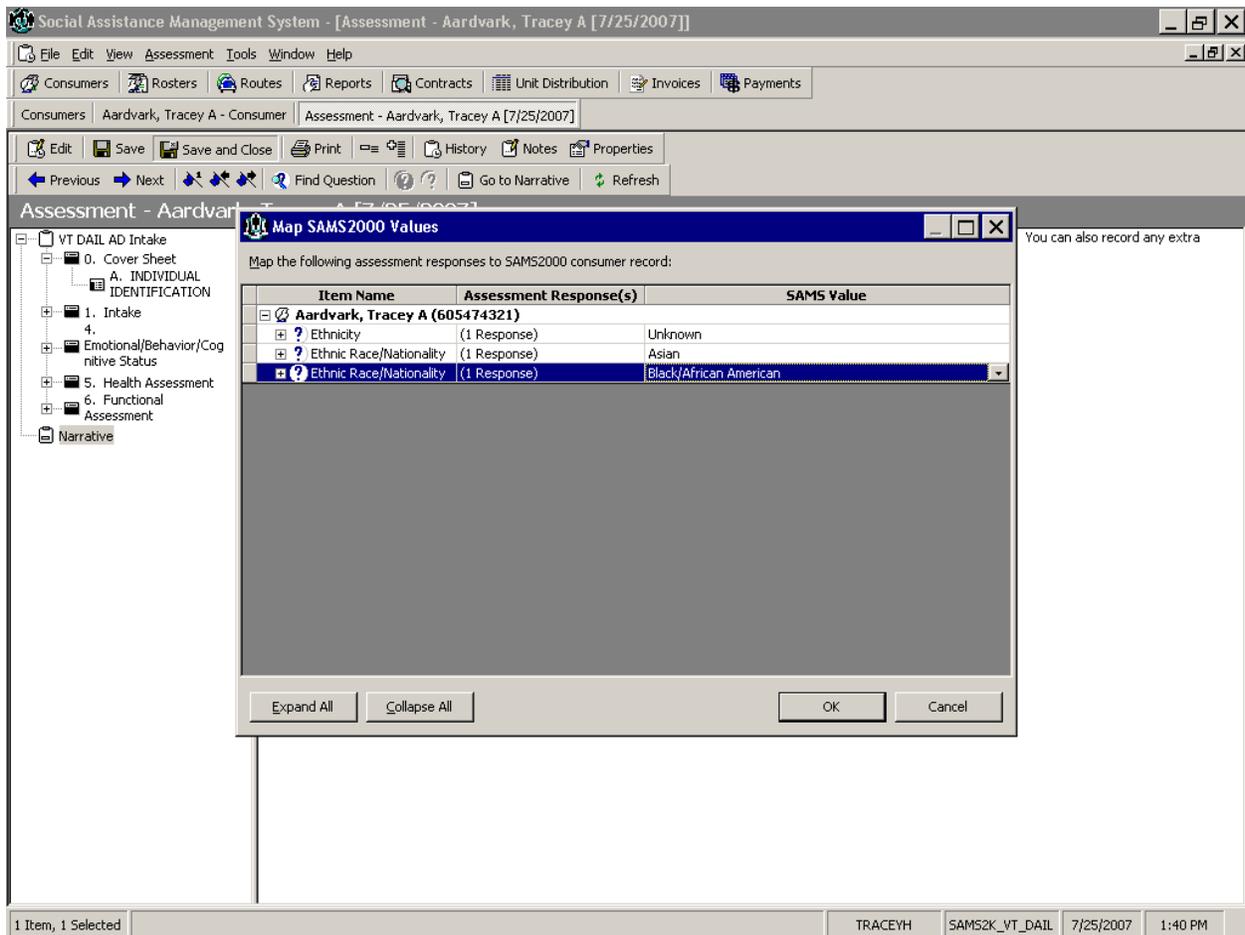


Saving the Assessment

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 displays the Social Assistance Management System (SAMS) interface for a consumer named Aardvark, Tracey A. The window title is "Social Assistance Management System - [Aardvark, Tracey A - Consumer]". The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar with various icons. A sidebar on the left contains navigation options: Contents, Summary, Details, Assessments, Care Management, Service Orders, Service Delivery, Actions, and Consumer Journal. The main area shows a table titled "Aardvark, Tracey A - Assessments" with the following data:

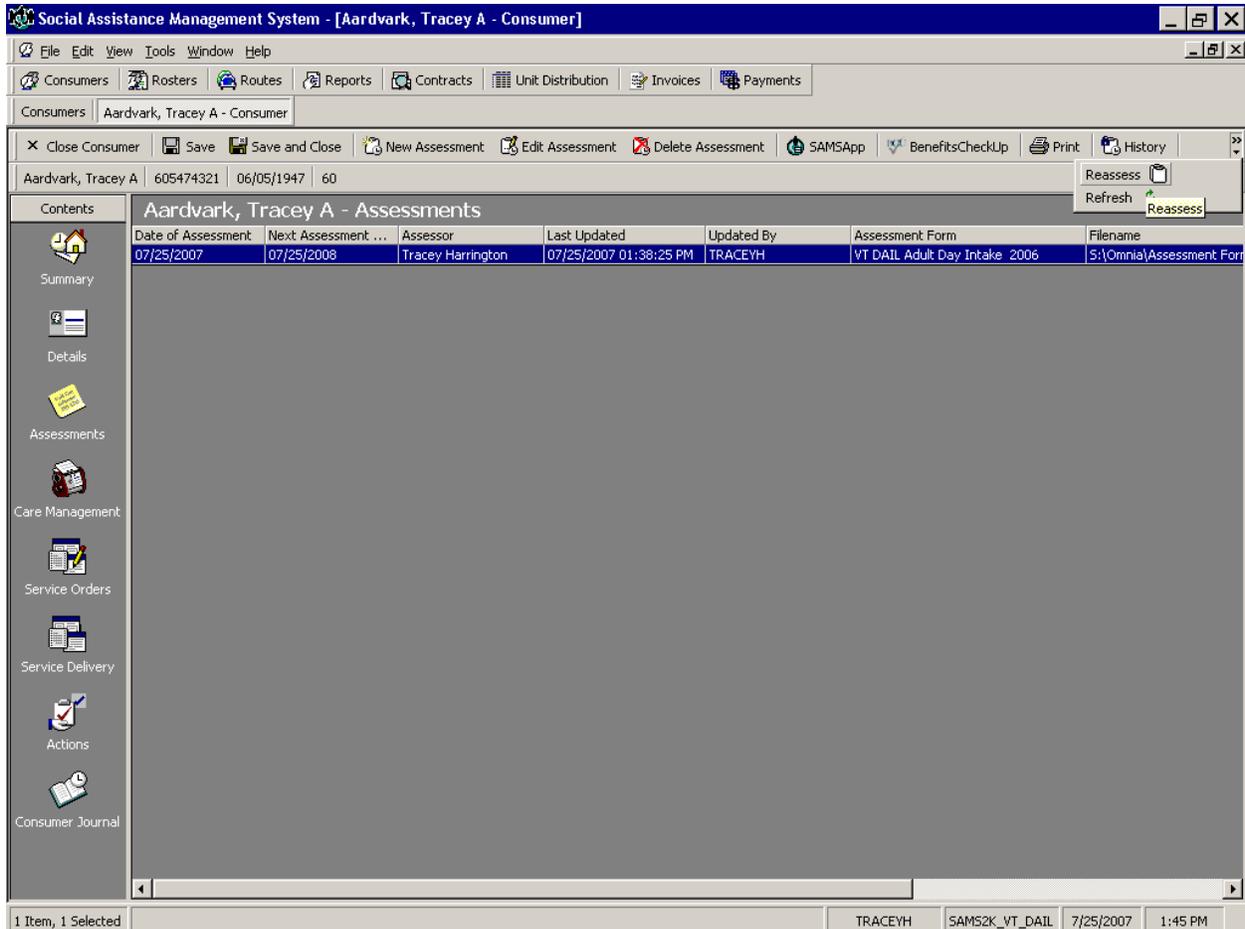
Date of Assessment	Next Assessment ...	Assessor	Last Updated	Updated By	Assessment Form	Filename
07/25/2007	07/25/2008	Tracey Harrington	07/25/2007 01:38:25 PM	TRACEYH	VT DAIL Adult Day Intake 2006	S:\Omnia\Assessment For...

At the bottom of the screen, a status bar indicates "1 Item, 1 Selected" and shows 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, in stead 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.

8. 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 shows the Social Assistance Management System (SAMS) interface. The title bar reads "Social Assistance Management System - [Aardvark, Anabelle Y - Consumer]". 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 breadcrumb trail shows "Consumers > Aardvark, Anabelle Y - Consumer".

The main content area is titled "Aardvark, Anabelle Y - Details". The left sidebar contains a "Contents" column with icons for Summary, Details, Assessments, Care Management, Service Orders, Service Delivery, Actions, and Journal. The "Details" icon is selected. Below the sidebar, there are links for "General", "Contacts (1)", "Locations (2)", "Phones (1)", "User Fields (2)", "Ethnic Races (1)", "Care Enrollments (9)", "Care Managers (4)", "Fund Identifiers", "Providers", "Caregivers (1)", and "Care Recipients".

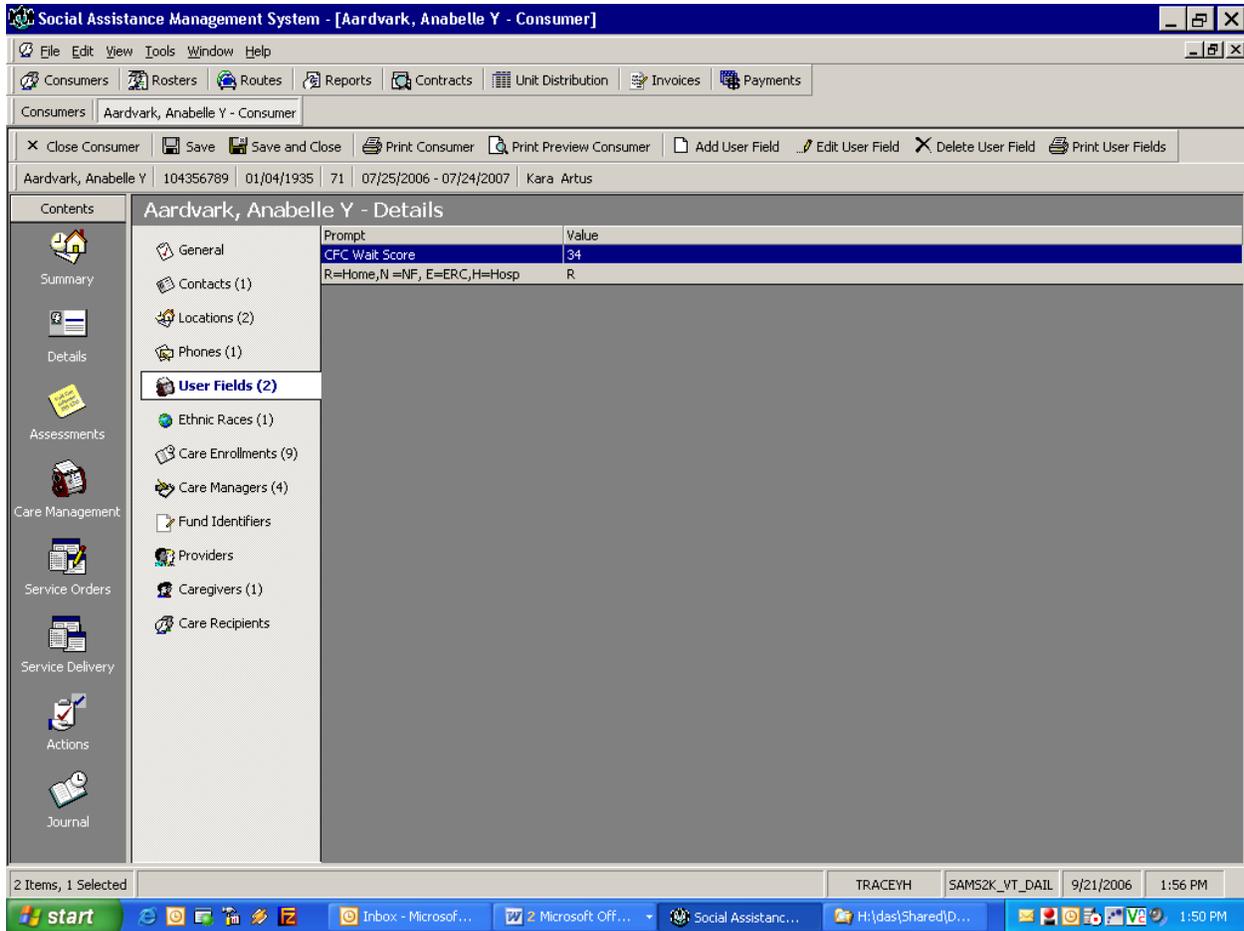
The "User Fields" section is expanded, showing a table of fields:

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	

The bottom of the screen shows the Windows taskbar with the Start button, system tray, and taskbar icons for "Inbox - Microsoft...", "2 Microsoft Offi...", "Social Assistance ...", and "H:\das\SharedD...". The system clock shows "9/21/2006 1:47 PM".

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 second item on the list shown above 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 and H for a hospital.

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.

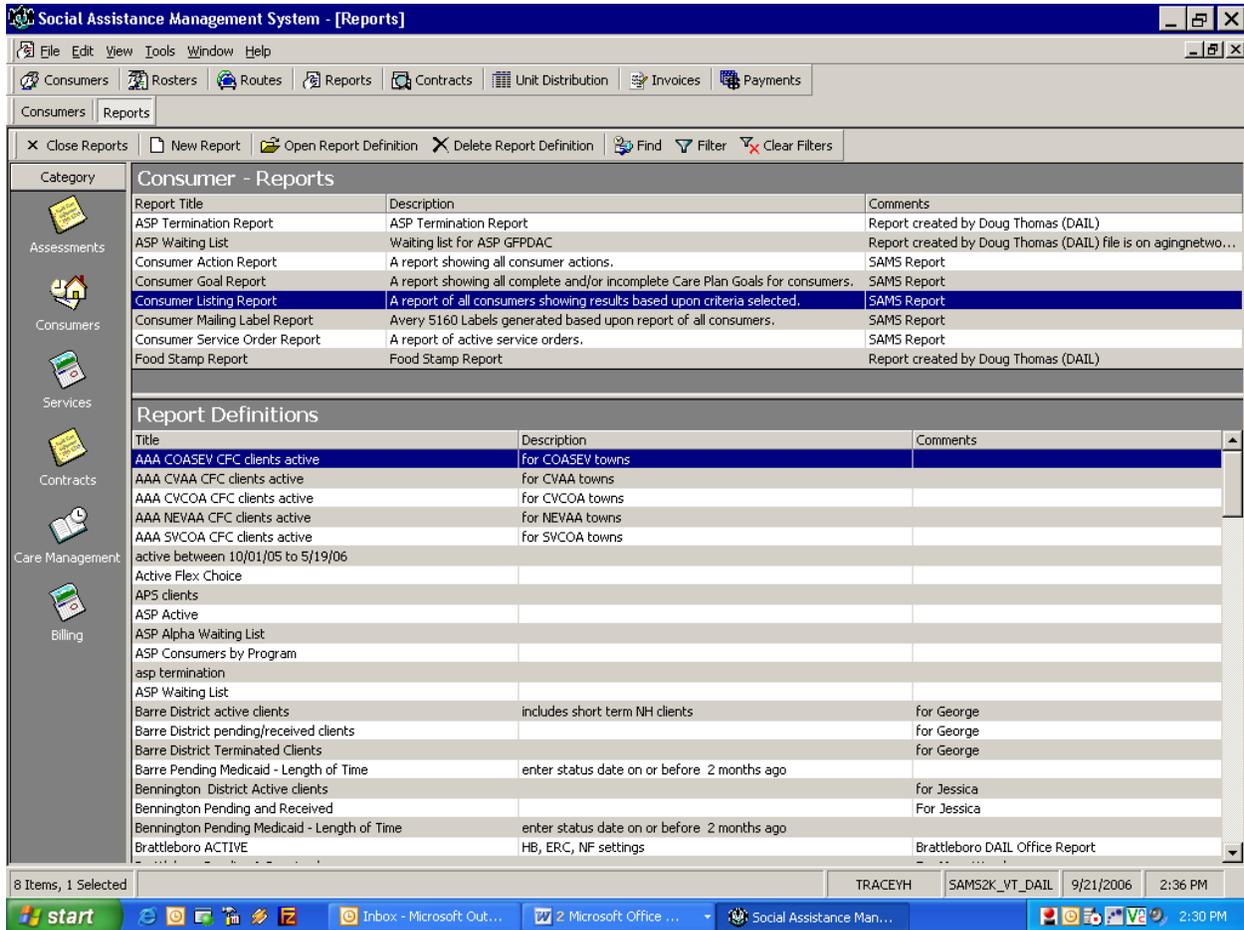
9. Running Reports

Report Categories

To run reports, click on Reports from the main SAMS screen

Show a screen shot for this

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.



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)

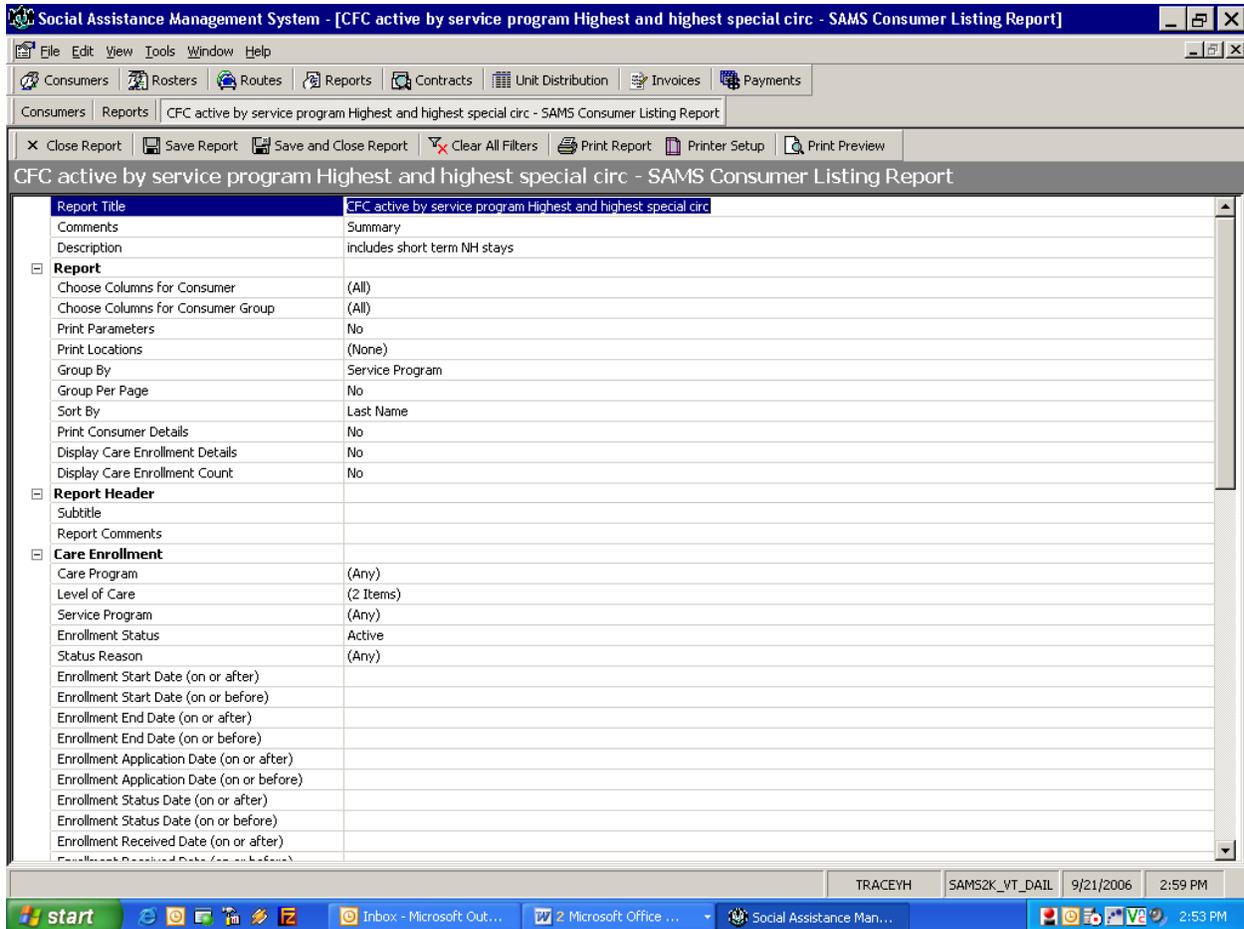
Report Definitions

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 Social Assistance Management System (SAMS) interface. The main window title is "CFC active by service program Highest and highest special circ - SAMS Consumer Listing Report". The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar with options like "Close Report", "Save Report", "Save and Close Report", "Clear All Filters", "Print Report", "Printer Setup", "Print Preview", "Stop Preview", and "Refresh Report".

The left-hand pane shows a tree view with the following sections:

- Report Title: CFC active by service program Highest ...
- Comments: Summary
- Description: includes short term NH stays
- Report
 - Choose Columns for Consumer: (All)
 - Choose Columns for Consumer Group: (All)
 - Print Parameters: No
 - Print Locations: (None)
 - Group By: Service Program
 - Group Per Page: No
 - Sort By: Last Name
 - Print Consumer Details: No
 - Display Care Enrollment Details: No
 - Display Care Enrollment Count: No
- Report Header
 - Subtitle:
 - Report Comments:
- Care Enrollment
 - Care Program: (Any)
 - Level of Care: (2 Items)
 - Service Program: (Any)
 - Enrollment Status: Active
 - Status Reason: (Any)
 - Enrollment Start Date (on or after):
 - Enrollment Start Date (on or before):
 - Enrollment End Date (on or after):
 - Enrollment End Date (on or before):
 - Enrollment Application Date (on or after):
 - Enrollment Application Date (on or before):
 - Enrollment Status Date (on or after):
 - Enrollment Status Date (on or before):
 - Enrollment Received Date (on or after):
 - Enrollment Received Date (on or before):

The right-hand pane shows the report preview, which includes a summary table:

Client ID	Gender	DCB	Primary Phone	Town of Residence	County	Zip
Summary:						
Service Program: LK Walker Nursing Home short term (WAP-Medicaid)						Total: 194 consumers.
Service Program: LK Walker Nursing Home short-term						Total: 455 consumers.
Service Program: LK Walker Nursing Home short-term (WAP-Medicaid)						Total: 2,472 consumers.
Service Program: LK Walker Nursing Home short-term						Total: 12 consumers.
Service Program: LK Walker Nursing Home short-term						Total: 25 consumers.
Grand Total:						3,242 consumers.

The bottom of the screen shows the Windows taskbar with the Start button, several open applications (Inbox - Microsoft Outlook, Microsoft Office Word, Social Assistance Management System), and the system tray showing the date (9/21/2006) and time (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.

Report Definitions

Title	Description	Comments
AAA COASEV Messages		To read client specific messages to COASEV
AAA CVAA Messages		to read client specific messages to CVAA
AAA CVCOA Messages		To read client specific messages to CVCOA
AAA NEVAA Messages		To read client specific messages to NEVAA
AAA SVCOA Messages		To read client specific messages to SVCOA
APS Incidents		
ARIS Messages		To read client specific messages to ARIS
ASP ILA review date		
ASP Waiting history		
Barre LTCCC messages		
Bennington LTCCC messages		
Brattleboro LTCCC messages		
Burlington LTCCC messages		
CFC clinical eligibility		
CFC Wait list by program		
CFC waiting list by action	date completed - start date = time on wait list	by action in progress or change to completed
Doctor Appointments		
Hartford LTCCC messages		
Megan's Messages		
Middlebury LTCCC messages		
Morrisville LTCCC messages		
Newport LTCCC messages		

Report Definitions

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)

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 Social Assistance Management System (SAMS) interface. The main window is titled "CFC waiting list by action - SAMS Consumer Action Report". The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar with various icons. The report details are as follows:

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 bottom status bar shows the user is STATEADMIN, the session is SAMS2K_VT_DAIL, the date is 9/8/2005, and the time is 1:35 PM. The Windows taskbar at the bottom shows the Start button and various application icons, with the system clock displaying 1:38 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.

Social Assistance Management System - [CFC waiting list by action - SAMS Consumer Action Report]

File Edit View Tools Window Help

Consumers Rosters Routes Reports Contracts Unit Distribution Invoices Payments

Consumers Aardvark, Aaron - Consumer Reports CFC waiting list by action - SAMS Consumer Action Report

Close Report Save Report Save and Close Report Clear All Filters Print Report Printer Setup Print Preview

CFC waiting list by action - SAMS Consumer Action Report

Report Title	CFC waiting list ...
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)	

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Preview

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

Waiting	Status	In Progress			
Start Date	8/2/2005	Due Date	n/a	Date Completed	n/a

Waiting	Status	In Progress			
Start Date	7/1/2005	Due Date	n/a	Date Completed	n/a

Total:	2 unduplicated consumers
Grand Total:	2 unduplicated consumers
Summary:	2 consumers; 0 consumer group.

STATEADMIN SAMS2K_VT_DAIL 9/8/2005 1:39 PM

Start 1:41 PM

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.

The screenshot shows the 'Social Assistance Management System - [Barre LTCCC messages - SAMS Consumer Action Report]' window. The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar with options like 'Close Report', 'Save Report', 'Save and Close Report', 'Clear All Filters', 'Print Report', 'Printer Setup', and 'Print Preview'. The main area is titled 'Barre LTCCC messages - SAMS Consumer Action Report' and contains a configuration table for the report.

Report Title	Barre LTCCC messages
Comments	
Description	
Report	
Choose Columns for Consumer	(All)
Choose Columns for Group	(All)
Print Parameters	No
Group By	Status Date
Group per Page	No
Sort By	Last Name
Show Action Details	Yes
Print Consumer Details	Yes
Report Header	
Subtitle	
Report Comments	
Action	
Action	Barre LTCCC messages
Status	(Any)
Reason	(Any)
Status Date (on or after)	
Status Date (on or before)	
Due Date (on or after)	
Due Date (on or before)	
Start Date (on or after)	
Start Date (on or before)	
Date Completed (on or after)	
Date Completed (on or before)	
Care Enrollment	
Level of Care	(Any)
Service Program	(Any)
Care Program	(Any)
Enrollment Status	(Any)
Status Reason	(Any)

The bottom of the window shows a taskbar with the Windows Start button, several open applications (Microsoft Office, Citrix, etc.), and system tray information including the user name 'TRACEYH', session 'SAMS2K_VT_DAIL', date '9/13/2006', and time '3:16 PM'.

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

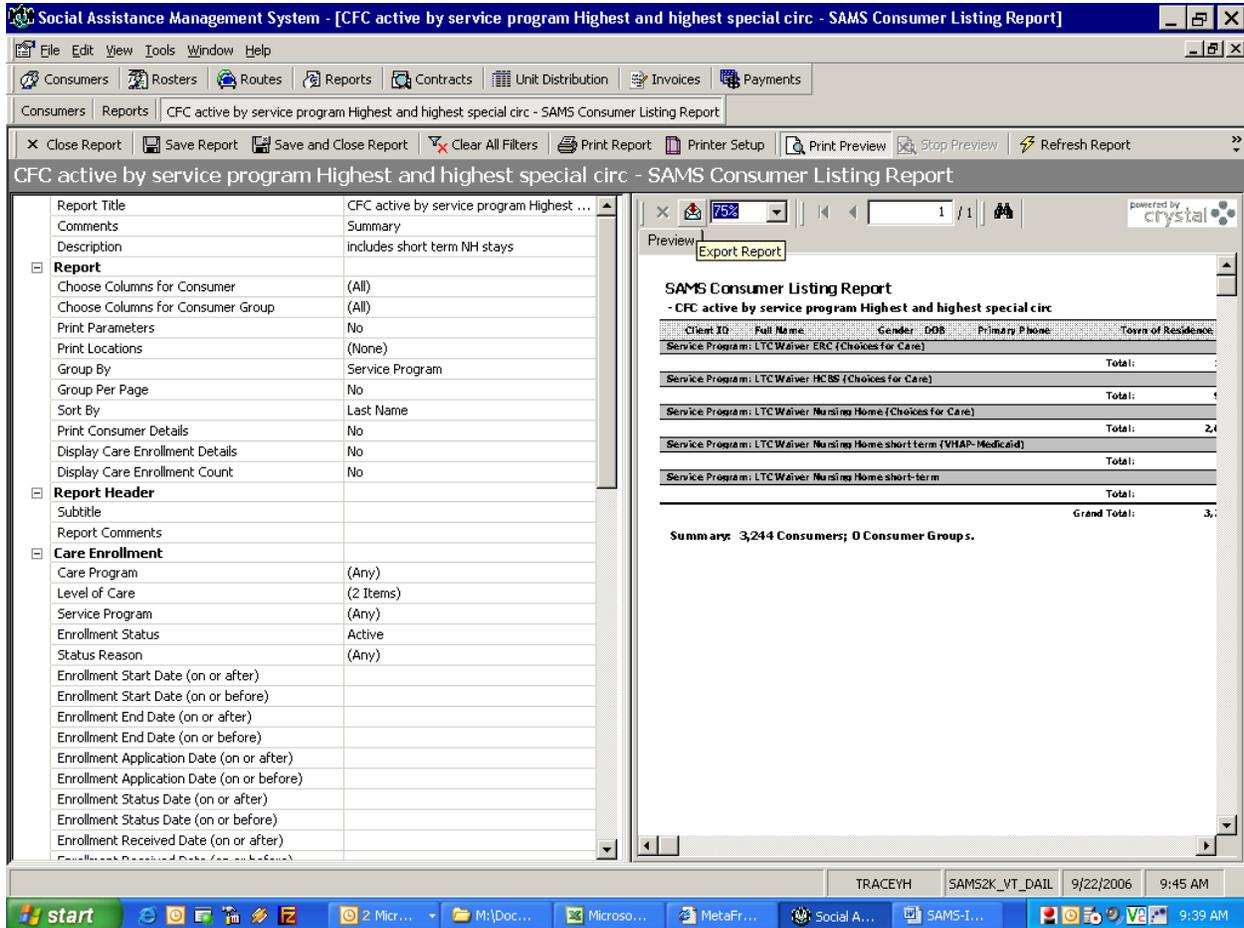
Subject	Action	Status
check on DOB for this client from Nancy	Barre LTCCC messages	Not Started

Reason	Status Date	Start Date	Due Date	Date
This client is missing DOB, please follow up and enter correct data in SAMS	2/1/2006	n/a	n/a	

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

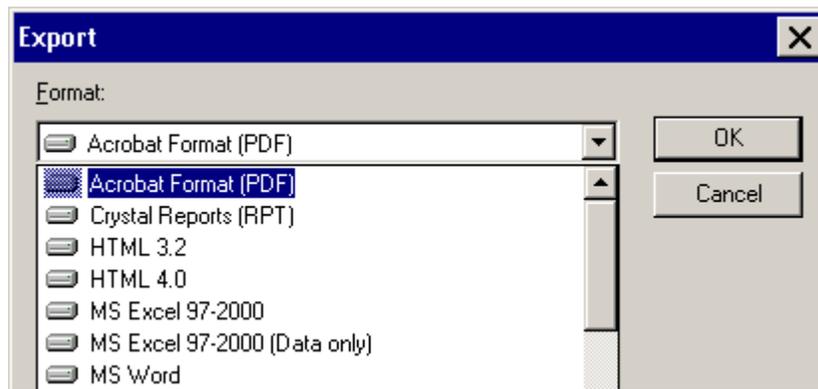
Exporting Reports

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



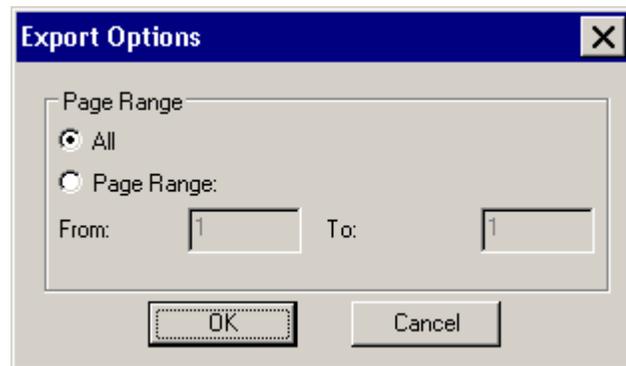
Format Option

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.



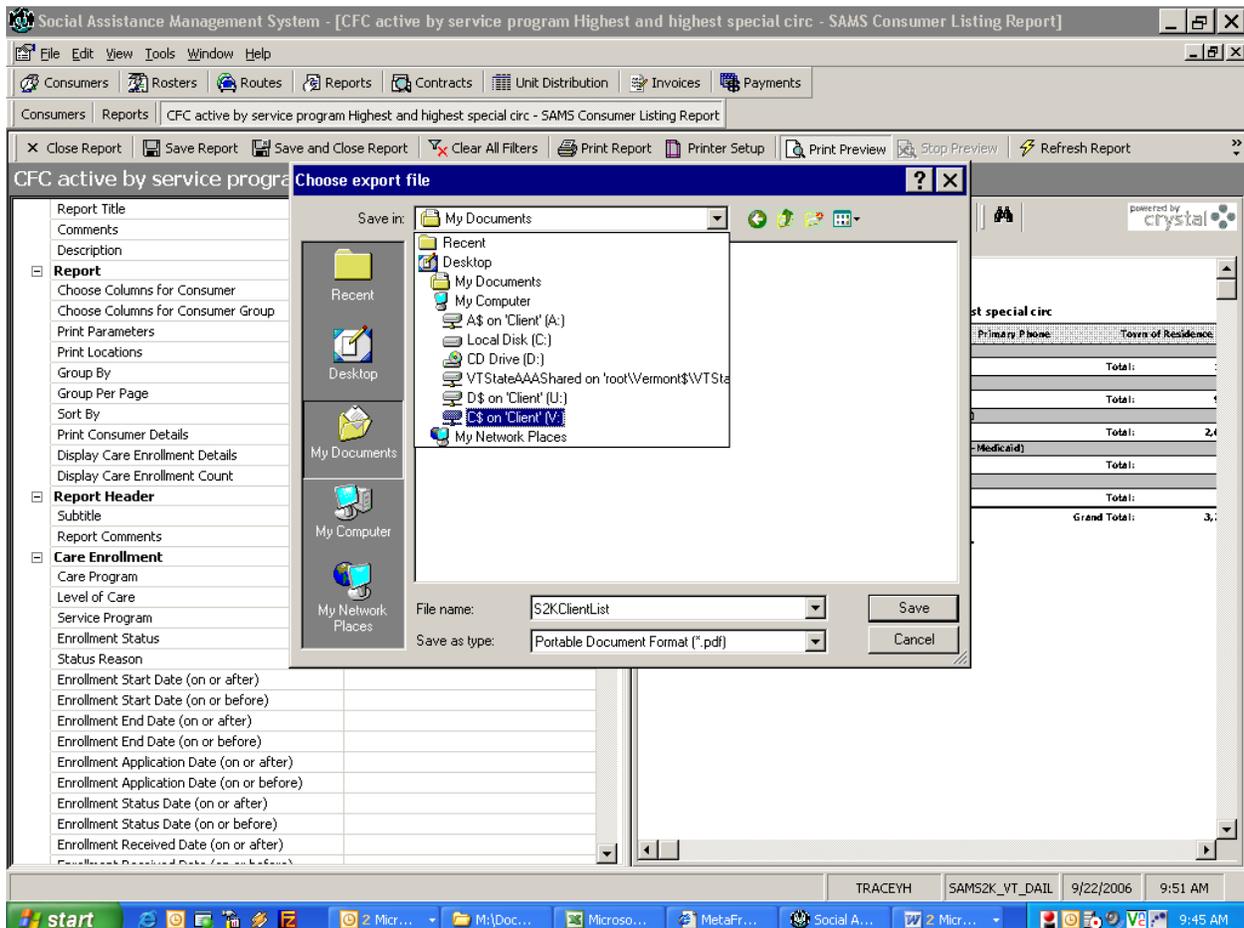
Export Page Range Options

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.



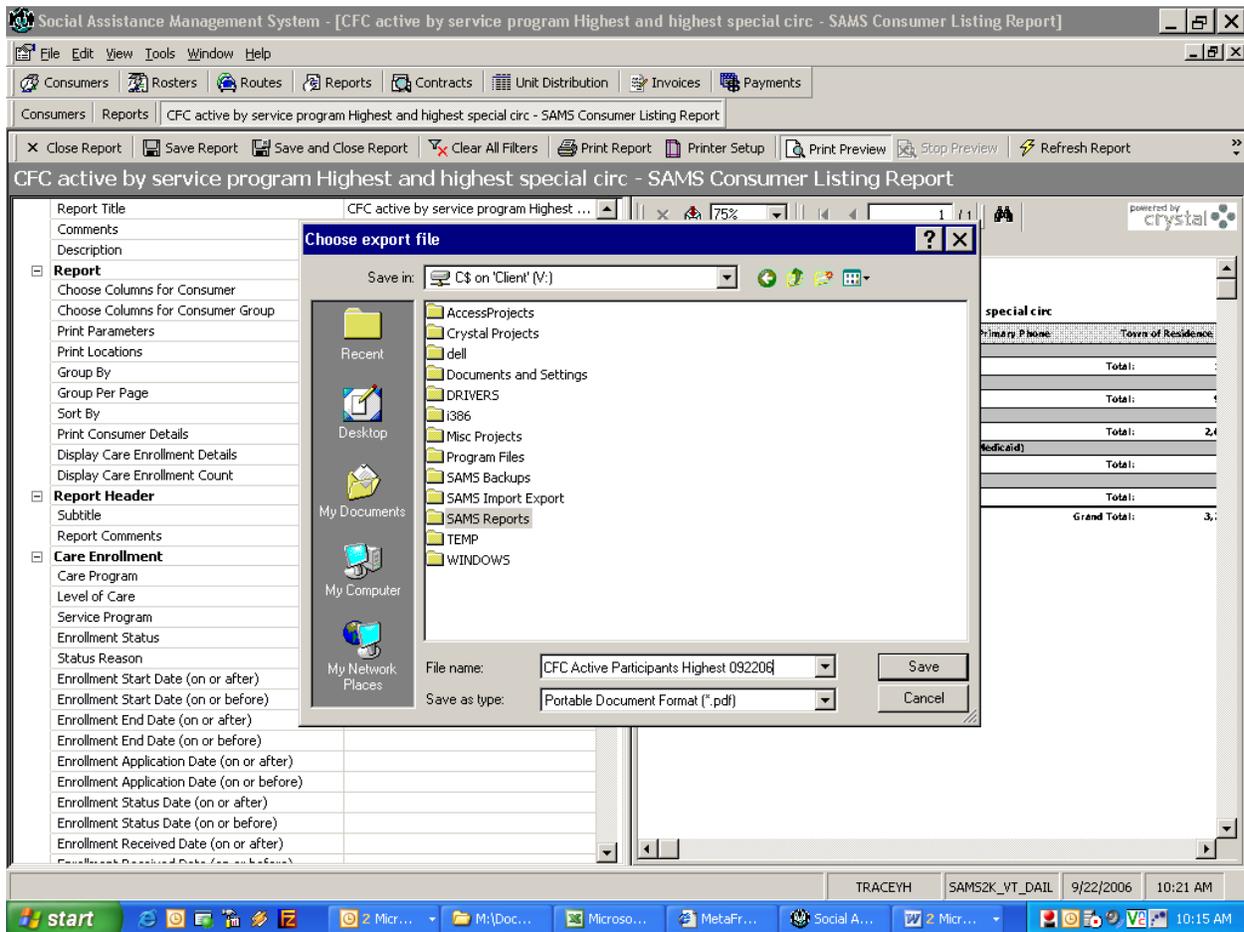
File Location Options

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.

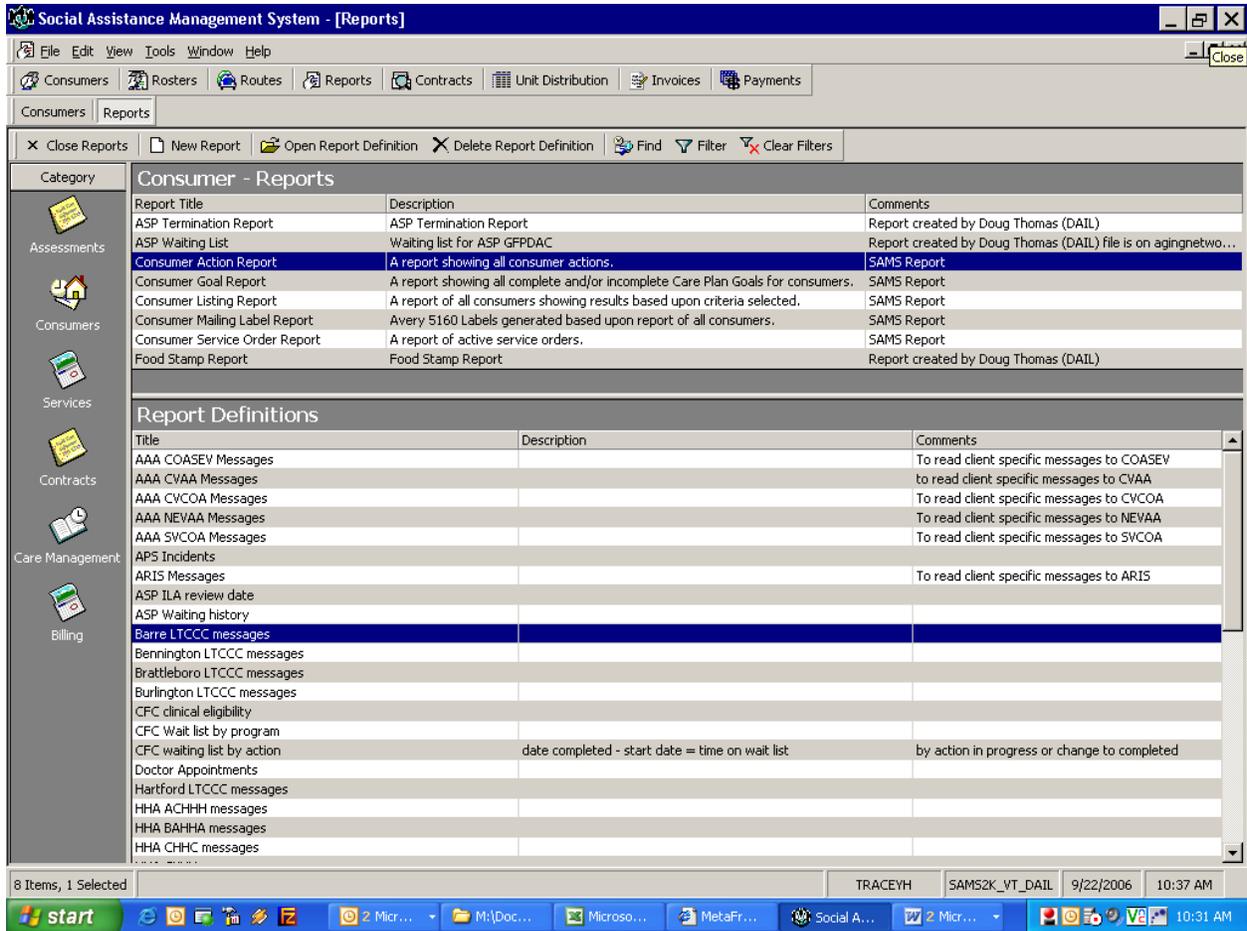


Close Reports

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

10. 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.