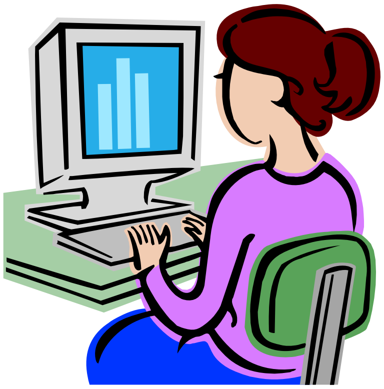
Department of Disabilities, Aging & Independent Living

Choices for Care

# SAMS/OMNIA Provider Reference Guide

1.25.12



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## Introduction

SAMS (Social Assistance Management System) is a proprietary database system developed & owned by Harmony Information Systems. The database is on the internet through Harmony's website agingnetwork.com. SAMS is where Consumer, Program, Assessment and Service information is stored. You can access SAMS anywhere that you can get to the internet.

OMNIA is additional software that allows DAIL to create assessment forms and users to export an assessment from the internet to their laptop if they cannot access the internet in the field. Once the assessment is imported back to agingnetwork, assessments are in SAMS.

Local OMNIA should only be used when you cannot access SAMS via the internet. OMNIA on agingnetwork should only be used to export to laptop and import assessments to agingnetwork.
All users purchase the right to utilize the system from Harmony. Harmony provides support to users. Harmony's support is for their product not for VT DAIL program specific information such as what an enrollment status means.

Goals of using SAMS include better Consumer services and support through real time information sharing, a reduction in paper and more efficient processing for DAIL programs.

Currently the 5 AAAs all have their own SAMS database where they record their consumer information. A consolidation project is now underway to consolidate the 5 AAA and DAIL database into one shared database. The consolidation will be completed by March 2012.

# SECTION I –SAMS 101

You have two usernames and passwords. One is to log onto Agingnetwork (AN). The other is to log into the DAIL database SAMS.
Your agingnetwork password must be changed on a regular basis. You will get a pop-up box informing you when it's close to the time that you must come up with a new password within 14 days. Please do not let it expire or it will have to be reset. Make sure that you remember your password when you change it. DAIL does NOT know your agingnetwork password.
You're an username is generic and it starts with a short name for your agency (i.e. VNA-).

## A. Login to Agingnetwork

1. Go to agingnetwork on the internet (www.agingnetwork.com)
2. Click **"Go to Customer Login"**
3. Enter Agingnetwork: **Username and Password** (assigned by Harmony)
4. Click Harmony for Aging
5. Click SAMS-Harmony for Aging
6. Log in Pop up box

a. Enter SAMS Username (assigned by DAIL)
b. Enter SAMS Password (assigned by DAIL)
c. Database = **SAMS2K_VT_DAIL**
d. Click "OK"

You are now logged into the DAIL SAMS database! ☺

## B. Find a Consumer in SAMS

To protect Consumer information in SAMS you will only see a consumer if your agency is associated with that Consumer in SAMS. If you cannot find a specific consumer, contact your local LTCCC. Let them know your involvement with the consumer and that you are not able to see them in SAMS.

To search for a Consumer:

A. Click **"Consumer"** tab on toolbar
   a. CONSUMER SCREEN loads
B. Click **"search"**
   a. Enter last name, first name, or SS# any identifying information
C. Click **"OK"**
   a. A list of Consumer (s) will show
D. **Highlight** the correct Consumer and click **"OK" or double click** on the consumer

## C. Consumer Summary

This gives you a **summary** of information. You can see the major categories of information including: Demographic, Care Enrollments (programs), Care Management (care plans/service plans), Care Manager (case manager, public guardians), Activities & Referrals, Last Assessments, and User Fields. If you want more information, click on either the header or the icon on the left for the type of information you need.

You will see a list of all items in that category. For information on the specific item double click on the one you want to view.

## D. Program and Program Status

Click on **Details** or Click on the **Care Enrollment header** on summary screen.
You can see most information about the enrollment from this screen. For additional information Double Click on the Care Enrollment you want to view.

**Status:**

- **Received** = LTCCC has application but has not made clinical determination yet
- **Pending Medicaid Eligibility** = clinical is complete, Medicaid determination is pending
- **Pending Service Plan** = clinical and financial are complete. Service plan hasn't been received & processed by LTCCC
- **Waiting** – the person met High Needs and was placed on the wait list
- **Terminated** – they were on the program and are no longer
- **Denied** – never on the program, not eligible
- **Hold** – applications on hold for circumstances such as a prisoner who is waiting for his release date.

- **Application Closed** – Consumer withdrew application before final determination.

## E. Case Manager

From **Consumer Summary** screen
Upper Right hand corner displays current care manager (case manager)
Consumer's address is in the same place. It is good to notice if the address is correct.
To see history of managers click on Details, then click on Care Managers.

## F. Care Plan / Service Plan

From **Consumer Summary** screen you will find **service plans** under the **Care Management** (care plan) header.
To view a list of all care plans Click on **Care Management** header or Click on **Care Management** icon on the left.
Once at the list of care plans, Double Click on the **care plan** to see the **service plan**. This brings you to the care plan summary screen.
"Care Plan Details" list the start and stop dates and the status of the plan as well as if it is the initial assessment for that setting, a reassessment or change.
If a Service Plan was not approved as requested there will be information in the Care Plan comments.
Services such as Assistive Device/Home Modification will have information in Special Instructions such as the item that was approved.

*Note: the cost of services may be slightly different from the paper service plan due to calculations in SAMS. FC plans will have the exact monthly amount.*

## G. Activities & Referrals – wait list, complaints etc.

From **Consumer Summary**, activities are listed under the Activities & Referrals header.
For additional details, click on Activities & Referrals header on Consumer Summary or Click on Activities & Referrals icon on left.
Double click on the **activity** to see details.

## H. Assessments (forms)

Click on **"Assessments"** on left
To view the assessment information **double click** on the assessment you want to view.
Click on the **"Notes"** button on top of screen to view notes in the assessment.
To view the history of a questions click on the **History** tab on toolbar.

When you close assessment you will be asked if you want to **save** the assessment **–IMPORTANT click "NO".** Otherwise your name will become attached to the latest update to that assessment

## I. Create an assessment in SAMS:

1. Open Consumer
2. Click on Assessments
3. Locate most recent assessment and highlight (one click)
4. Click Reassess
5. Choose form (filename) you need to complete from drop down menu
6. Enter your Agency's name

7. Enter your name as Assessor
8. If you do not want notes and narrative <u>uncheck</u> the box on right
9. Click Save and Open or Save and Close

## J. Attachments:

1. Click on Attachments on left
2. Highlight the attachment you want to view
3. Click View Attachment

## K. Consumer Journal:

Click on Consumer Journal on left. Double click on the journal entry you want to view.

## L. User Fields

User Fields are where information such as a High Needs wait score and the setting where someone was when they applied is recorded.
User Fields are listed on the Consumer Summary screen.

## M. SAMS Default Settings

It is useful to set your SAMS default settings to minimize data entry. You can also change the look of SAMS under settings.
Tools – on top tool bard
Options – bottom of list

**1. List Setting, Property Settings, Consumer Summary Settings –** font settings

**2. Default Settings (half way down)**
Default Agency – your agency
State Abbreviation – VT
Area Code – 802
Load Dashboard on Setup – no unless you want to use your dashboard on a regular basis.

**3. OMNIA Settings –** Do not change these

**4. Assessments**
Required Questions Prompt – no
Default Reassessment Date (Months) – 12
Update Client Record? -Most Recent Only

# <u>**SECTION II - OMNIA Instructions** Create, Export, Complete, Import</u>

OMNIA allows the user to export an assessment from the database on the internet (agingnetwork)to their laptop, complete the assessment in the field while NOT connected to the internet, and then import the assessment back to the database on agingnetwork when connected to the internet. You must create your assessment while on agingnetwork, export to your laptop, complete the assessment in the field, then import to agingnetwork. If you have access to the internet when you complete the assessment you do not need to use OMNIA. You can create, complete and edit an assessment in SAMS on agingnetwork.

<u>Only export **YOUR** assessment. **NEVER** export someone else's assessment.</u>

## A. Create Assessment (in office)

1. Log in to agingnetwork ( www.agingnetwork.com)
   a. Enter **Agingnetwork Username & Password** (Note: your password must be reset every 90 days. If your password needs to be reset you must contact DAIL DPU and we will contact Harmony. In the future you will be able to manage your password reset through the internet.)
2. Click <u>OMNIA Interviewer- Harmony for Aging</u>
   a. Enter **SAMS** Username
   b. Enter **SAMS** Password
   c. Login Profile - Assessments on Agingnetwork. This should be your default. Do NOT use the "assessments on laptop" profile when on agingnetwork.
   d. Use SAMS Database = YES
   e. SAMS Database = SAMS2K_VT_DAIL
   f. Click OK
3. Click "Consumers" to look for your consumer
4. Click "Find"
   a. Enter Last Name, SS# etc. and click "Find Next" until you locate the consumer.
   b. Click "Cancel" to close the Find box
5. Highlight correct consumer
6. Double click on consumer to open
7. You will see a list of all assessments
8. Highlight your assessment if you already created it and continue to export, #2 below. If not:
   a. Highlight (single click) the assessment you want to reassess (copy)from
   b. If the need to complete the first (initial) ILA, reassess from the **LTCCCs clinical assessment**
   c. If a reassessment, choose the most recent **ILA** which will either be by a provider or the **LTCCC UR**.
   d. If the consumer doesn't have any assessments click "New"
9. Click Reassess
10. Reassessment Window pop up (only enter filename, agency, assessor, date)
11. **Filename** – choose the assessment form <u>you need to complete</u> from the drop down menu (if you cannot find the assessment form refer to the Browse instructions). Make sure you are using the current version.

12. **<u>Agency – choose your agency name from drop down menu (very important since this is tied to security)</u>**
13. <u>DO NOT ENTER CARE PROGRAM</u>
14. **Assessor** – enter your full name
15. **Date** – auto populates with today's date. You can change the date when you complete the assessment.
16. Do **NOT** enter a Password
17. "Copy Notes and Narrative" is by default checked. This will copy over the notes from the assessment you are reassessing from. If you <u>do not</u> want the notes and narrative uncheck this box.
18. Click "Save and Close". *If a message comes up about "assessment indicators" click "yes". If MAP SAMS Consumer Details" and/or "MAP SAMS Values" comes up Click "OK". If you get a message to upgrade form click yes.*
19. Click "Close Consumer"

## B. Export Assessment (in office) from internet to laptop

1. Click "EXPORT"
    a. Pop up "Export to Repository"
2. Select the Consumer(s) you want to export
    a. To find the Consumer choose one of the following:
        i. Click **"Find"** to search for the consumer. Choose the search information from the drop down list (i.e. last name, first name..), enter consumer's information and click "Find Next" Keep clicking Find Next until it gets to the correct consumer.
        ii. **Filter** – by date you created the assessment
        iii. Click on the **Alphabet tabs** on the left and scroll
        **iv. Scroll**
3. Select the Consumer by placing a check mark ☑ in the box next to them.
4. Click **"Next"**
5. Message "Are you sure you want to choose these __ consumer for export?"
6. Click **"Yes"**
7. Select the assessment to Export by placing a check mark ☑ in the box next to it. *If there are many assessments, first click* ***"deselect all"*** *then check the assessment you want to export.* **ONLY EXPORT YOUR ASSESSMENT**
8. Click **"Next"**
9. "**Export to Login Profile"** - Select "**Assessments on laptop**" from drop down list. This is where you want the assessment to go.
10. Click **"Next"**
11. "Export Item and Access Levels" should **NOT be checked**
12. "Append (export into) Target Repository" ☑ checked.
13. **<u>NEVER</u>** check **"Check Out"**
14. Click **"Finish"**
15. "The export completed successfully, would you like to review the detailed export log?" Click **"Yes" or "No"** depending on if you want to review what you exported.
16. Close out of OMNIA on Agingnetwork (X at top right OR File, Exit)

## C. Verifying Successful Export (in office) *Optional*

1. Open OMNIA INTERVIEWER from Icon on laptop
2. enter SAMS Username
3. enter SAMS Password
4. Click “OK”
    a. *Note that you are on OMNIA Interview Local*
5. Click “CONSUMERS”
    a. Find the consumer and double click to open. Find **<u>your</u>** assessment that you exported.
6. Close OMNIA Interview Local (x or File, Exit)
7. Shut Down Laptop

## D. Complete Assessment – (in the field)

1. Log on to laptop
2. Open OMNIA INTERVIEWER from Icon on laptop
3. Enter SAMS Username
4. Enter SAMS Password
5. Login profile - assessments on laptop (default)
6. Click CONSUMERS
7. Double Click consumer you are assessing
8. Locate the assessment you need to complete and double click to open.
9. You may choose to click “NOTES” at the top of the screen before starting the assessment. **Enter your name or initials and the date at the end of your notes and narrative.** We recommend deleting old notes and narratives.
10. Complete the Assessment
11. Personal Care Worksheet summary is located at the end of the ILA assessment. It will automatically populate with the information you enter in the ILA. If a calculation diamond is the color Red that means you have not fill in all required information.
12. ADLS – the CFC benefit time auto populates once the ADL assessment score is entered. For CFC personal care calculation you must enter the time requested and number of days.
13. You must enter a number, amount of time, number of days for the personal care worksheet calculations. If no time is being requested please enter a zero (0).
14. ADLs – enter additional information and variance request information in the <u>comment section</u> of the ADL. If more space is needed and you want to add information in the NOTES please put “See Notes” in the specific ADL comment section.
15. To calculate the time for an ADL which varies throughout a week such as meal prep when the consumer attends adult day, determine the daily need, total for weekly amount, then divide by the number of days CFC will assist. (example: meal prep needed 5 days a week by CFC. 2 days a week meal(s) are prepared at adult day. 3 days at 60 min, 2 days at 45 min. 3 x 60 = 180, 2 x 45 = 90, 180+90=270 270/5 =54. You would enter 54 min/day needed from CFC for meal prep.
16. 6 C.1, 6.C.2 & 6.D are <u>only for ASP.</u>
17. <u>7A Estimated/requested Incontinence needs</u> – enter the amount of time, days or (0) zero to be carried over to the personal care worksheet.
18. Review Personal Care Worksheet at end of assessment.

19. RED Diamond indicates not enough information has been entered to make the calculation. Green Diamond means that calculation occurred.
20. Transpose the bi-weekly amount requested to the paper Service Plan. Remember to round to the nearest quarter hour.
21. Click Save & close
22. Log off laptop

## E. Import Assessment (in office) from laptop to internet

1. Log in to agingnetwork.com
2. Click Harmony for Aging
3. Click OMNIA Interviewer –Harmony for Aging
    a. Enter SAMS Username
    b. Enter SAMS Password
    c. Login Profile = Assessments on Agingnetwork (Login Profile)
    d. Use SAMS database? = YES
    e. SAMS Database = SAMS2K_VT_DAIL
4. OK
5. Click "IMPORT"
6. **Import from Repository**: From **where** do you want to import?
    a. Import From Login Profile (drop down) = Assessments on laptop
7. NEXT
8. ☑ consumer from list you want to import
9. NEXT
10. Choose ☑ the assessment(s) you want to import
11. NEXT
12. Import Users and Import Item Access Levels – **leave unchecked**
13. Next
    a. If MAP SAMS Values – click OK
14. Click "Close"

*If you get a message about a duplicate CONSUMER do not continue,* ***Cancel.*** *Verify that all the consumer's indentifying information is correct. Correct if necessary. If the assessment originated in a AAA database you must ensure that the AAA SAMS consumer ID information is the same as what is in DAIL SAMS. Review: Unique ID, SS#, DOB, Name*

## F. Browsing For Forms

When creating a new assessment or a reassessment, if you do not see it the form on the drop down list you **browse** to find it.
Under Filename choose "Browse…"
Forms are located under s:\OMNIA assessment forms
Choices for Care forms begin with "VT DAIL CFC"
Locate the form by scrolling down the list.
You want to find the form with the most current date.
When the form you need is highlighted you click "OK"
The next time you need that form it will show up under the filename drop down.

When on OMNIA local, if the form you are looking for is not on the drop down list, go to DAIL's website:
http://www.ddas.vermont.gov/ddas-forms/sams-omnia-electronic-assessment-forms/omnia-electronic-assessment-forms

Copy the form you need to your C drive, Omnia data
(C:\Omnia data)

# SECTION III - Choices for Care and SAMS/OMNIA Process

*Until at least all CFC case management agencies, all case managers, are utilizing OMNIA and SAMS there will be variations throughout the State. After a provider (s) has been trained to use OMNIA a meeting should occur with the LTCCC to establish how your agency will be using OMNIA/SAMS: assessments, retrieving Clinical Certifications, Service Plans etc.*

Submitting OMNIA ILA for CFC
Coordination between agencies is vital. The ultimate responsibility for a complete ILA submission is the CFC case managers.

## A. One agency completing a reassessment ILA including Health Section:

1. CM completes ILA electronically including Health Section
    a. First ILA reassess from LTCCC Clinical Assessment
2. CM reviews/revises personal care worksheet calculation at end of ILA *(see personal care worksheet instructions)*
3. Imports ILA into DAIL SAMS database
4. CM completes & mails a paper Service Plan or FC Allowance & other required forms to local LTCCC (ILA & personal care worksheet are not mailed)
5. LTCCC receives service plan/FC allowance (employer agent cert, ADHM as needed)
6. LTCCC checks SAMS for ILA (If not in SAMS return paperwork)
7. LTCCC completes UR in SAMS. (VT DAIL CFC LTCCC UR)
8. When Medicaid is approved, LTCCC authorizes Service Plan and enters it in SAMS.
9. *If CM agency & LTCCC are using SAMS Alerts, LTCCC completes Alert Activity in SAMS.*
10. *CM agency checks Dashboard for Alerts in SAMS.*
11. Opens Service Plan in SAMS for authorized services

LTCCC mails consumer the service plan with the notice letter and providers not using SAMS.

## B. Two agencies completing a reassessment (AAA & HHA)

**Both Agencies at assessment:**

1. CM reassess from most recent LTCCC UR or ILA in SAMS
2. Export to Laptop
3. CM completes sections of ILA except Health Section
4. HHA RN enters the health section information into the AAA ILA reassessment at visit.

**Agencies assess separately (same steps if RN assess first)**

1. CM reassess from most recent LTCCC UR or ILA in SAMS
2. Export to Laptop
3. CM completes all sections except Health Section
4. CM import reassessment to SAMS
5. CM notify HHA
6. HHA RN reassess from CM ILA to full ILA on agingnetwork
7. HHA RN exports their assessment to laptop
8. HHA RN completes Health Section
9. HHA RN imports assessment to agingnetwork

10. HHA RN informs CM assessment is on agingnetwork
11. CM logs into SAMS
12. CM reviews personal care worksheet at end of ILA
13. CM completes Service Plan and other paperwork and sends to LTCCC (Except ILA & PC Worksheet). It would be a good idea to let the LTCCC know to look at the ILA completed by the HHA RN that is complete.

## C. OMNIA Assessments & CFC

When you complete the ILA or any OMNIA form by reassessing from another form (assessment) you need to be conscious of whether or not you are copying notes, comments and narrative from the source assessment.

If you *do not* want the **notes & narrative** from the source "assessment" form to be copied onto your assessment, uncheck the small box at the bottom of the reassessment box which appears after you click reassess. The box reads "Copy notes and narrative".

Best practice if you copy the notes and narrative is to **delete** the old comments before you import the assessment**. Notes should be directly related to that specific assessment.**

**Always put your initials and the date after all comments and notes so they are identifiable to assessment date and assessor.**

## D. CFC Personal Care Variances

When requesting a personal care variance, please provide the justification of need information in the **comment** related to the specific ADL. If you need more writing space please put ***see note*** in the comment section and put additional information in the notes.

**E. Utilization review -Personal care worksheet –** If the LTCCC is not going to authorize the services requested, they will complete a VT DAIL CFC UR form in SAMS IF the ILA from the case manager is in SAMS. Notes about the changes will be included in the UR under the specific ADL and/or narrative. The UR form is a copy of the case managers ILA with the changes by the LTCCC. Case managers should review the changes and the personal care worksheet. If a plan is consumer or surrogate directed the case manager should review the revised worksheet with the “employer”. At the next assessment (Change or Annual Reassessment) the case manager shall reassess (copy) from the most recent assessment. If there is a UR assessment it will be the most recent.

To view the revised personal care worksheet in the consumer’s file:
1. Click on Assessments
2. Find the Assessment – DAIL CFC LTCCC Utilization Review
3. Double Click to open the form.
4. DAIL CFC LTCCC Utilization Review form is the full ILA with the personal care worksheet at the end. If the LTCCC has changed information in the assessment you may want to review. If you need to print the functional information and worksheet calculations for care planning and

staffing you will want to print sections: 6A (ADLs), possibly 6B (IADLs), & 4 Utilization Review needs for HCBS Personal Care Worksheet.

5. 6A shows authorized time per day for ADLs.
6. 4 (worksheet) shows authorized time per week
7. If the requested amount of personal care services is **not approved as submitted**, remember to open the VT DAIL CFC LTCCC UR form for what has been approved. If you need to print the information to share with providers or consumers print:

- 6A Functional Assessment: Activities of Daily Living,
- 6B Functional Assessment: Instrumental Activities of Daily Living,
- 7A Estimated/ Requested Incontinence needs, and
- Utilization review needs for HCBS Personal Care Worksheet.

If you print the entire form you will have a full ILA document.

## F. Authorized Service Plan

To view the authorized Service Plan in the consumer in SAMS:

1. Click on Care Management (either on the left or the header in the summary)
2. Find the Care Plan you want to view
3. Double Click on the Care Plan to view the service details
4. If a Service Plan was not approved as requested there will be information in the Care Plan comments.
5. The Personal Care Worksheet is incorporated into the ILA & LTCCC UR form.

The goal is to reduce paper throughout the CFC system. All providers using SAMS should access the service plan, worksheet and assessment information from SAMS.
The LTCCC will mail a copy of the Service Plan until the agency with SAMS has agreed to get it from SAMS.

## G. Activity ALERT: How to find out if an action has occurred in a consumer SAMS file. *LTCCC will only create ALERTs for providers that have agreed to use SAMS in this way.*

The LTCCC will create, in the consumer's SAMS file, an ALERT Sent Activity when an action has been taken (i.e. clinical complete, service plan authorized). This will include your agency and the name of the case manager.
Either the case manager or the agency designee should check SAMS for ALERT activity in status ALERT SENT daily. This can be done through reports or by setting up a widget on your dashboard. Once you have completed any action/response needed to the activity, change the status to **ALERT Read**. This is important so your reports can be limited to only those ALERTs activities you have not already viewed.

ALERT Activities in SAMS are not actual messages like email. They are a permanent part of the consumers file. They should be only used to indicate an action has been taken in the consumers SAMS file. When providers start using OMNIA for other CFC forms, such as the assistive device home modification form, providers will create ALERT SENT activity to the LTCCC. Providers can also create ALERT SENT activities for other providers involved in the consumers care. An example: the AAA CM has completed an ILA assessment and the assessment is in SAMS. An activity ALERT SENT is created for the HHA that will create a reassessment from that ILA to complete the Health Section. The Activity in this case is the completion of the ILA.

# <u>SECTION IV - Other</u>

## A. Dashboard: a quick way to see certain lists of consumers you work with or search for a consumer. *OPTIONAL*

Dashboard can load upon log on if you indicate as such on your agingnetwork settings. The dashboard has "widgets". Each widget is a define search.

### The basic widgets are:

1. My Dashboard
2. Search Consumers - Enter consumer information and press your enter key on your keyboard
3. Care Plans Expiring - end date of care plans in SAMS, must be in care plan as Care Manager
4. Choose the time frame
5. Assessments Due - Assessment must be in the database with a Next Assessment date.Choose the time frame
6. Recent Consumer Assigned - if you have been added as a Care Manager in SAMS. Choose the time frame
7. Activities Due -
8. Additional Custom Searches can be created.

### Using widgets:

1. Click the blue arrow to clear search information
2. Double Click on Consumer in widget to open consumer file.
3. Little green arrows in widgets and dashboard **refresh** the information
4. My Dashboard- dashboard settings

## <u>B. Troubleshooting</u>

1. Harmony: 802-878-8514, 800-318-7260 or support@harmonyis.com
   Agingnetwork connection problems, frozen, cannot connect
   Error messages in SAMS/OMNIA
   Citrix Problems
2. Your agency IT – missing forms on laptop
3. DAIL –
   Policy & procedural questions
   Import/Export Problem

## C. Keying in SAMS/OMNIA

**1. General keying:**

- Mouse, arrow keys, enter
- Dropdown lists: mouse, start typing

**2. Assessments:**

**Moving between questions:**

- Mouse, arrow keys to move to a different question
- Tab Key to scroll through the questions

3. **Yes or No answer questions:**

- "A" keystroke for Yes, "B" keystroke for No
- Mouse

**4. Multiple Choice questions** (box on right of question with 4 dots):

- Use the space bar to open the choices box
- Use the "up" and "down" arrows to highlight the choices
- Use the space bar to select the answers
- Or use mouse

# Section V. OMNIA EXPORT IMPORT - short instructions

**1. LOGIN –**

1. Login to agingnetwork
2. Click on Harmony for Aging
3. Click on OMNIA Interview – Harmony for Aging
4. Login to OMNIA

**2. CREATE ASSESSMENT to EXPORT**

1. Click on Consumers
2. Click Find – enter information to locate specific consumer
3. Double Click on Consumer
4. Locate most recent clinical assessment, ILA or LTCCC UR
5. Click once to highlight the assessment you will copy from
6. Click Reassess
7. Filename – choose the assessment you will complete
8. Agency – your agency
9. Assessor – your name
10. Date – today's date
11. Click Save and Close
12. If mapping pop ups click OK
13. Close Consumer

**3. EXPORT**

1. Click Export
2. Find Consumer – check mark
3. Click Next
4. Choose YOUR assessment to export – check mark
5. Click Next
6. Export to Login Profile – assessments on laptop
7. Next
8. Finish

**4. IMPORT**

1. Login to agingnetwork, OMNIA in DAIL database
2. Click IMPORT
3. Import for login profile – Assessment on laptop
4. Next
5. Check Consumer
6. Next
7. Check assessment to import
8. Next
9. Next
10. OK – pop up successful import
11. Close