



Vermont's Guide to Omnia Interviewer

*A Step by Step Guide for using OMNIA
Interviewer™
For Consumer Assessments*



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1. Introduction

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

OMNIA Interviewer and HIPAA Compliancy

When using Omnia Interviewer or SAMS on Agingnetwork.com, there need not be any worry about HIPAA compliancy or security. This is because Synergy, the company hosting the databases, ensures that all information is protected and secure. However, when using the local Omnia Interviewer database on the laptop, each Agency/Organization is responsible to ensure the HIPAA compliancy and security of their data. The difference between the Agingnetwork.com and local databases is explained in Section II: Login Instructions.

Uses of the OMNIA Interviewer Database

The purpose of this guide is to support those working for or with the Vermont Department of Disabilities, Aging and Independent Living to perform consumer assessments using an electronic assessment form.

OMNIA Interviewer will be used to create new consumer assessments on servers (Agingnetwork.com) available through a secure internet connection. Each assessor will be able to export their consumers (and interview forms) to their laptop. He or she can then complete the assessment on the laptop. When assessments are complete the assessor can then login to Agingnetwork.com and import the assessment(s) to the main database on Agingnetwork.com. Once on Agingnetwork.com, the assessment(s) can then be deleted from the laptop as the official record of the assessment shall be kept in the main database on Agingnetwork.com. Assessments should not be deleted from the laptop until the assessor has verified that the import to the main database on Agingnetwork.com has been successful.

What is OMNIA Interviewer?

The OMNIA Interviewer is a software product from Synergy Software of Essex Junction, Vermont. OMNIA Interviewer is part of the SAMS software suite that deals with assessment forms. It allows assessments to be done independently of the SAMS database and then imported back into a SAMS database if needed.

What is Agingnetwork.com?

Agingnetwork.com is a Synergy software website that provides database hosting for Synergy software products. The database is accessible 24 hrs a day and 7 days a week to approved users via internet access.

What is SAMS?

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 including Attendant Services Program, Dementia Respite and Area Agency on Aging programs called NAPIS (which include case management, home delivered meals etc). High Tech Nursing and the Traumatic Brain Injury program will also be using SAMS soon.

SAMS is accessible 24 hrs a day and 7 days a week to approved users via internet access to a website called Agingnetwork.com. This website is hosted by Synergy and meets all HIPAA requirements for security. The CFC database in SAMS includes data such as consumer demographics, program enrollments and approved care plans and assessment data. SAMS fields can be used to send client-specific messages to other SAMS users in a confidential manner.

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.

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 Laverty 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 Laverty	241-2425	dick.laverty@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@ahsl.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

2. Summary of Steps – Assessments in the Field

The following is an overview of the steps to take when performing assessments when out of the office. If more detail is needed, see the section each step refers to.

NOTE: If your organization performs assessments while in the office (such as an Adult Day Provider), you will enter assessments directly into SAMS on Agingnetwork. See the sections titled **Creating a New Assessment on Laptop** (however, this will be done in SAMS on Agingnetwork), and **Entering/Editing Assessment Data**.

In the Office – Agingnetwork:

1. Log into Omnia on Agingnetwork, make sure drop down in toolbar says “SAMS”: Section 3, **Omnia Interviewer Login on Agingnetwork.com**
2. Create the assessment on the consumer in preparation. Section 4, **Finding Individual Consumers/Creating Blank Assessment for Export**
3. Export Consumer(s) from Agingnetwork to Login Profile of Assessments on Laptop: Section 5, **Exporting Consumers From Agingnetwork to Laptop**
4. Log off Omnia on Agingnetwork: Section 8, **Logging Off**
5. Log into Omnia on the Laptop: Section 6, **Omnia Interviewer Login on Laptop**
6. Check to make sure Exported Consumer(s) are on Omnia on Laptop: Section 4, **Finding Individual Consumers**
7. Log off Omnia on Laptop: Section 8, **Logging Off**

In the Field – Laptop:

1. Log into Omnia on Laptop: Section 6, **Omnia Interviewer Login on Laptop**
2. Create and populate assessment with Consumer (or, if initial assessment was created in SAMS, edit existing assessment): Section 7, **Entering/Editing Assessment Data**
3. Save assessment: Last Step in Section 7, **Entering/Editing Assessment Data**
4. Log off Omnia on Laptop: Section 8, **Logging Off**

In the Office - After Assessment:

1. Log into Omnia on Agingnetwork: Section 3, **Omnia Interviewer Login on Agingnetwork.com**
2. Import Consumer(s) to Agingnetwork using Login Profile of Assessments on Laptop: Section 9, **Importing Consumers (Assessments) From Laptop to Agingnetwork.com**
3. Log off Omnia on Agingnetwork: Section 8, **Logging Off**

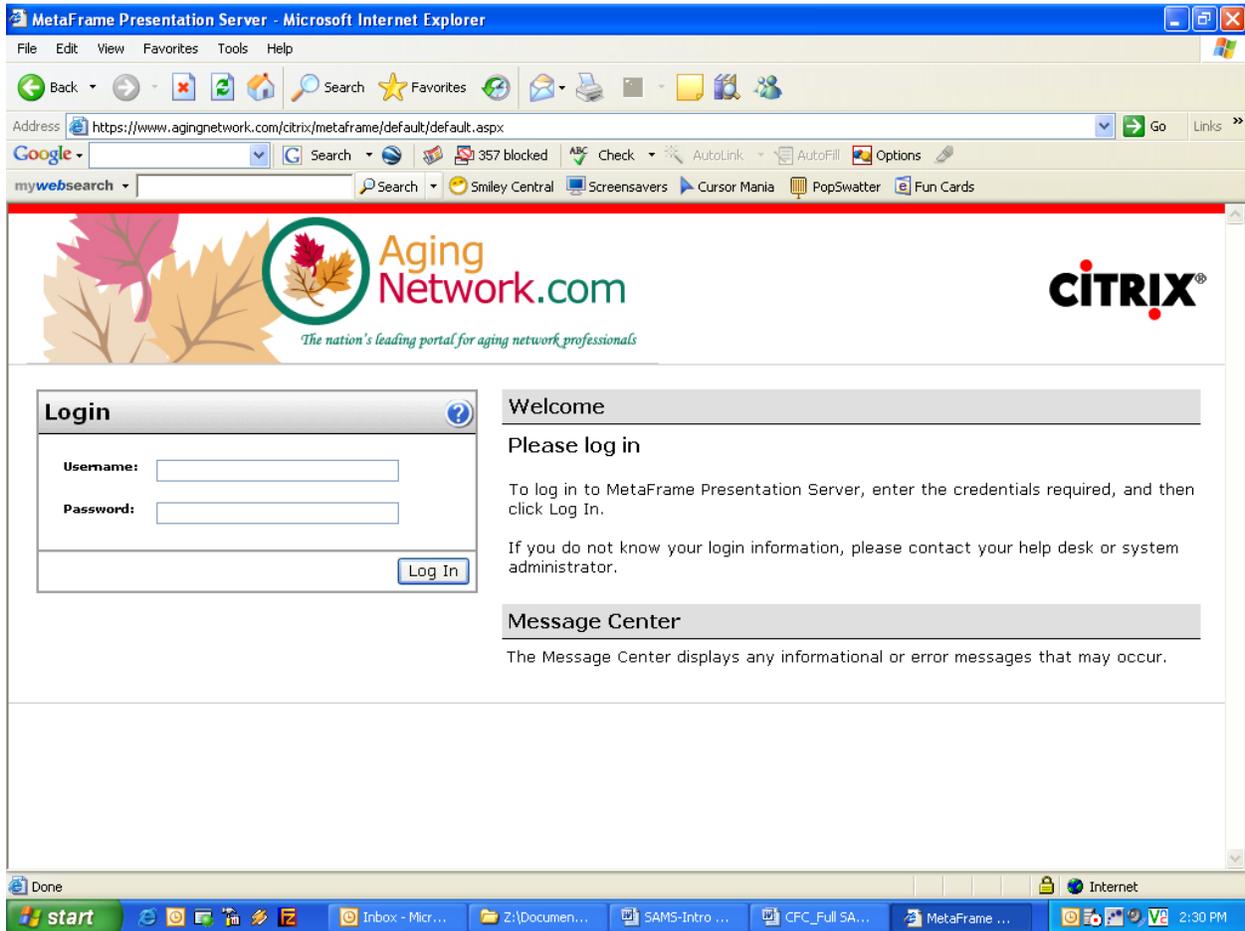
3. OMNIA Interviewer Login on Agingnetwork.com

Agingnetwork.com login

From Internet Explorer, go to the AgingNetwork.com Web Page at www.agingnetwork.com.

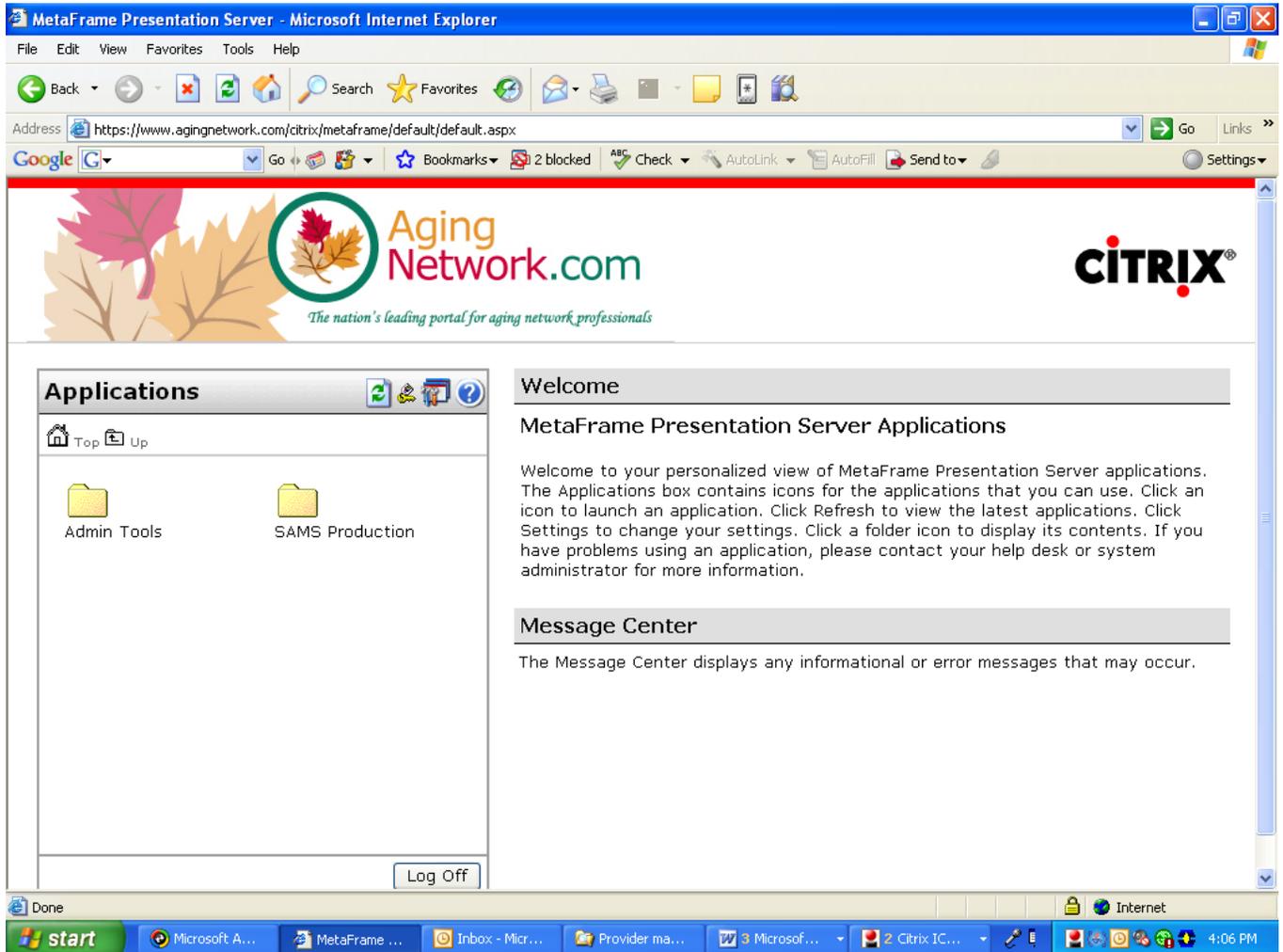


Click on the “Agingnetwork.com Login” link in the upper right hand section of the page. This will take you to the following screen, which gives access to Agingnetwork.com. Note that the first time you login, the Citrix Web Client will need to be installed. To alleviate possible problems in the future, the installation of the Citrix Web Client should be installed by someone with administrative privileges. If you are unaware of who this person is, please contact the staff support point person appointed in your organization. Once the Web Client is installed, login to AgingNetwork.com using the username and password created by Synergy and provided by the IDU of DAIL/DDAS. **Remember: passwords are case sensitive!**



OMNIA Interviewer Login on Agingnetwork.com

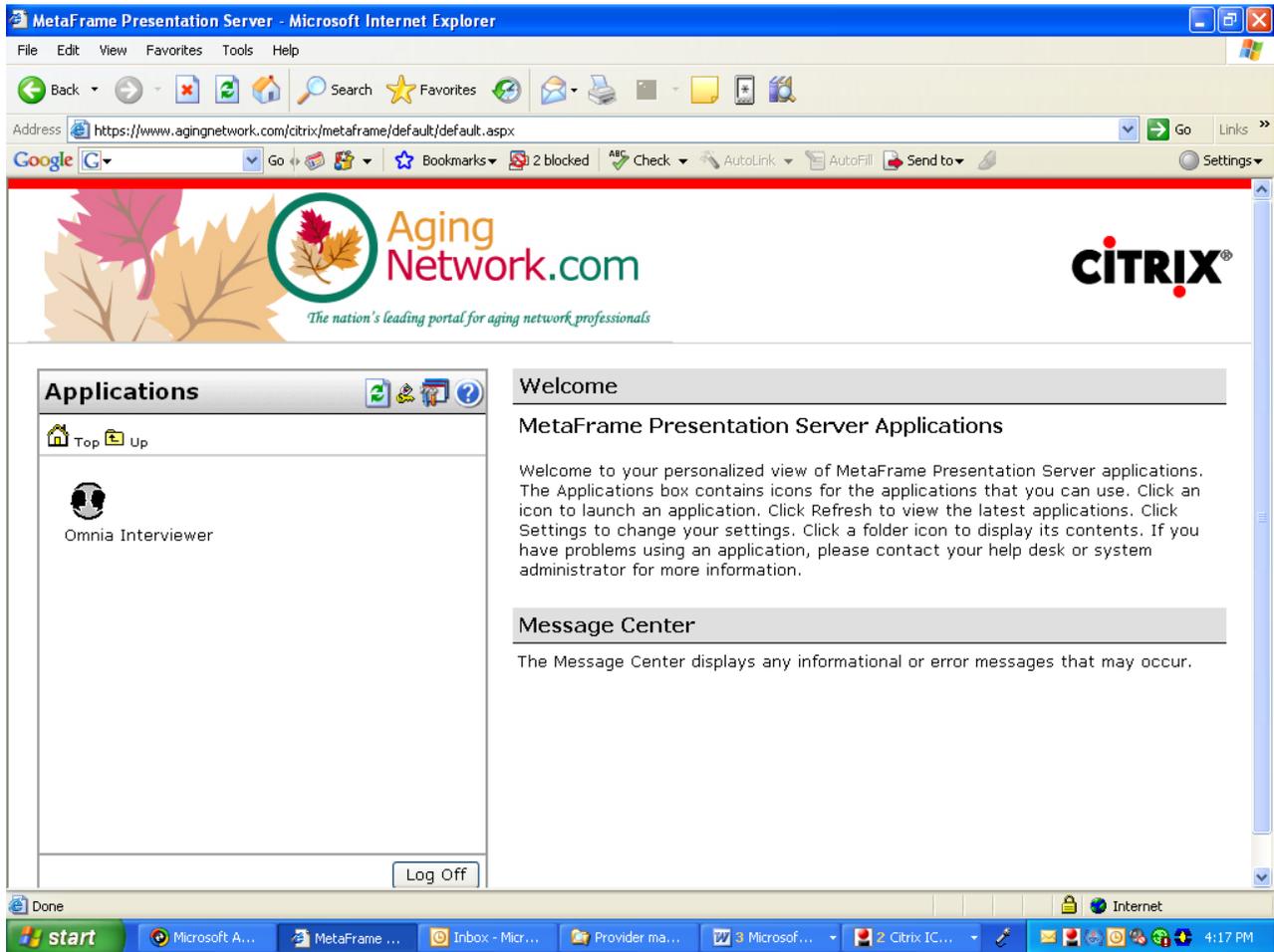
After entering your agingnetwork.com id and password you will see the screen below.



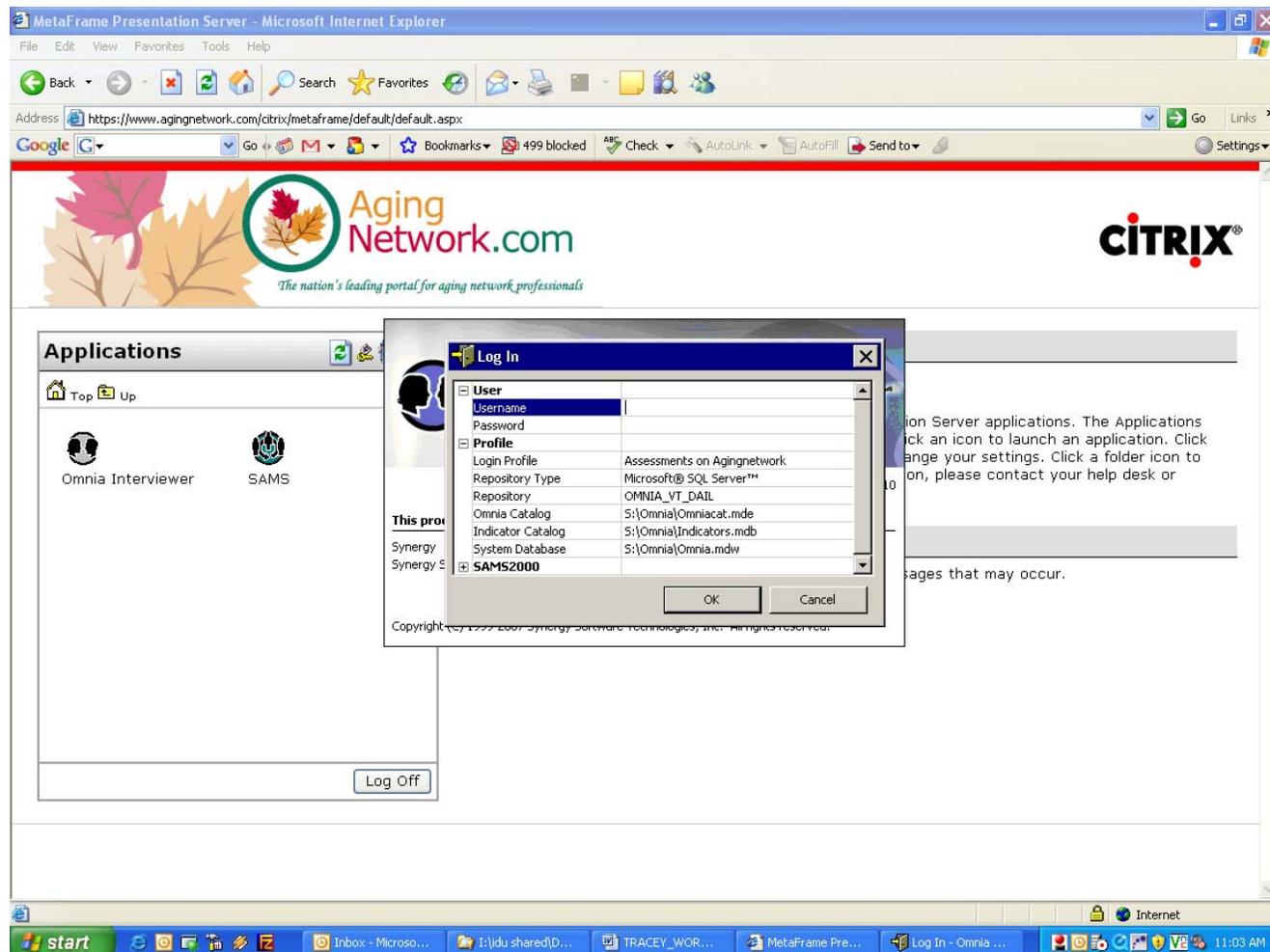
The admin tools folder has Microsoft Access© on Agingnetwork.com which will be used for reporting. The reporting feature is discussed later in the document under the section entitled "Reporting". The Admin Tools folder is for ADMINISTRATIVE STAFF ONLY.

Click on the SAMS Production folder.

After clicking on the SAMS Production folder you will see the icon for OMNIA Interviewer as shown below. Depending on your access permissions, you may also see other icons such as the SAMS program.



Click on the icon for OMNIA Interviewer and a pop-up window with the login screen will appear as shown below.

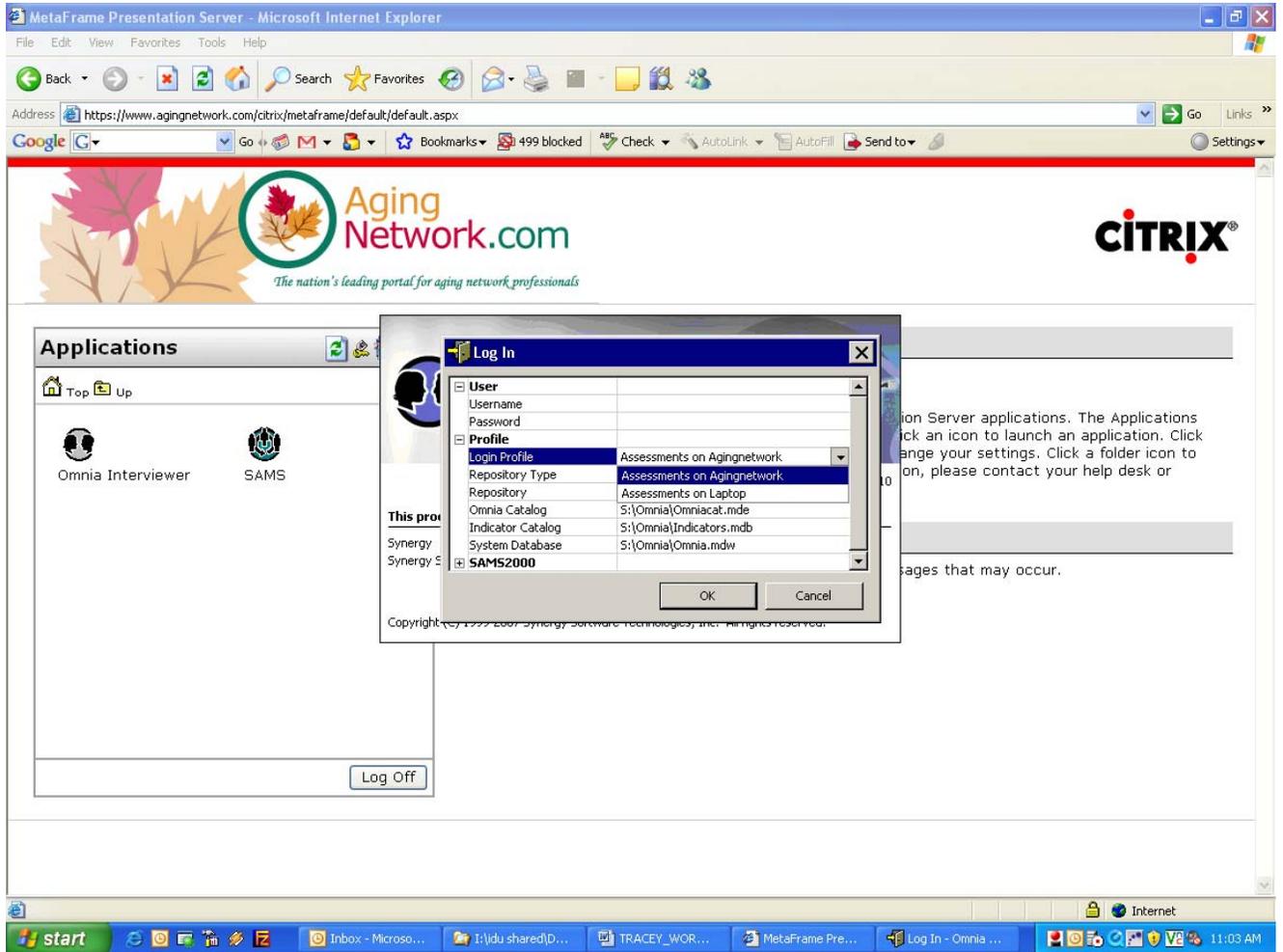


On the login screen you will enter your OMNIA ID and password which were given to you by DAIL-IDU. This id and password are different from the agingnetwork.com id and password. **Remember: passwords are case sensitive!**

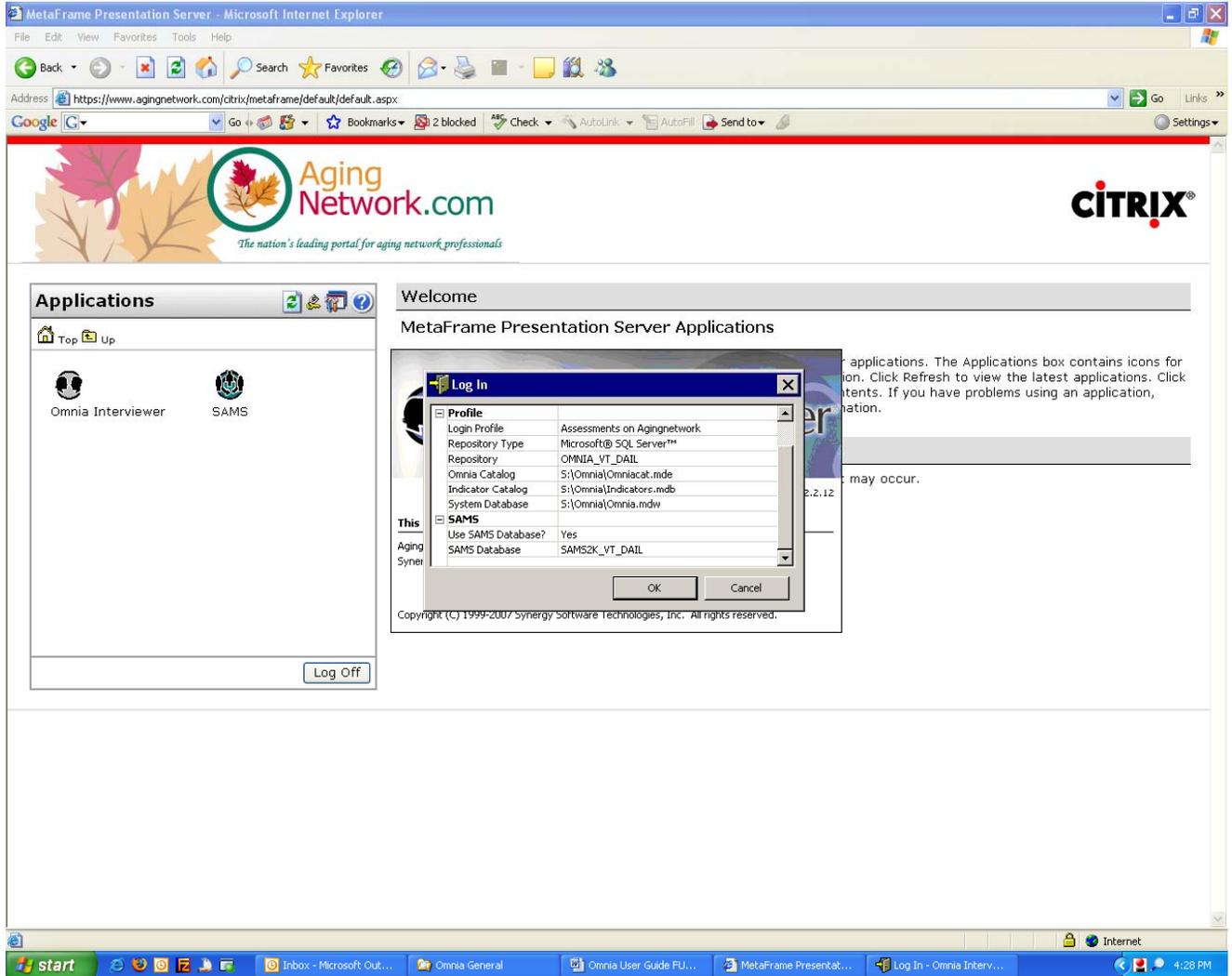
The profile section of the login screen contains two login profiles. One profile will be used for logging into the agingnetwork.com database and the other will be used for logging into the database on your laptop. These login profiles are "Assessments on Agingnetwork" (for logging into the agingnetwork.com database) and "Assessments on Laptop" (for logging into the database on your laptop). For this exercise, if the login profile is not "Assessments on Agingnetwork", click on the Login Profile line and a drop down arrow will appear. Choose "Assessments on Agingnetwork".

When logging in to agingnetwork.com your login profile should be "Assessments on Agingnetwork". When not connected to Agingnetwork.com and only using your laptop as a stand alone the login profile should be "Assessments on Laptop". Details of using the laptop alone are discussed in the section entitled Omnia Interviewer Login on Laptop.

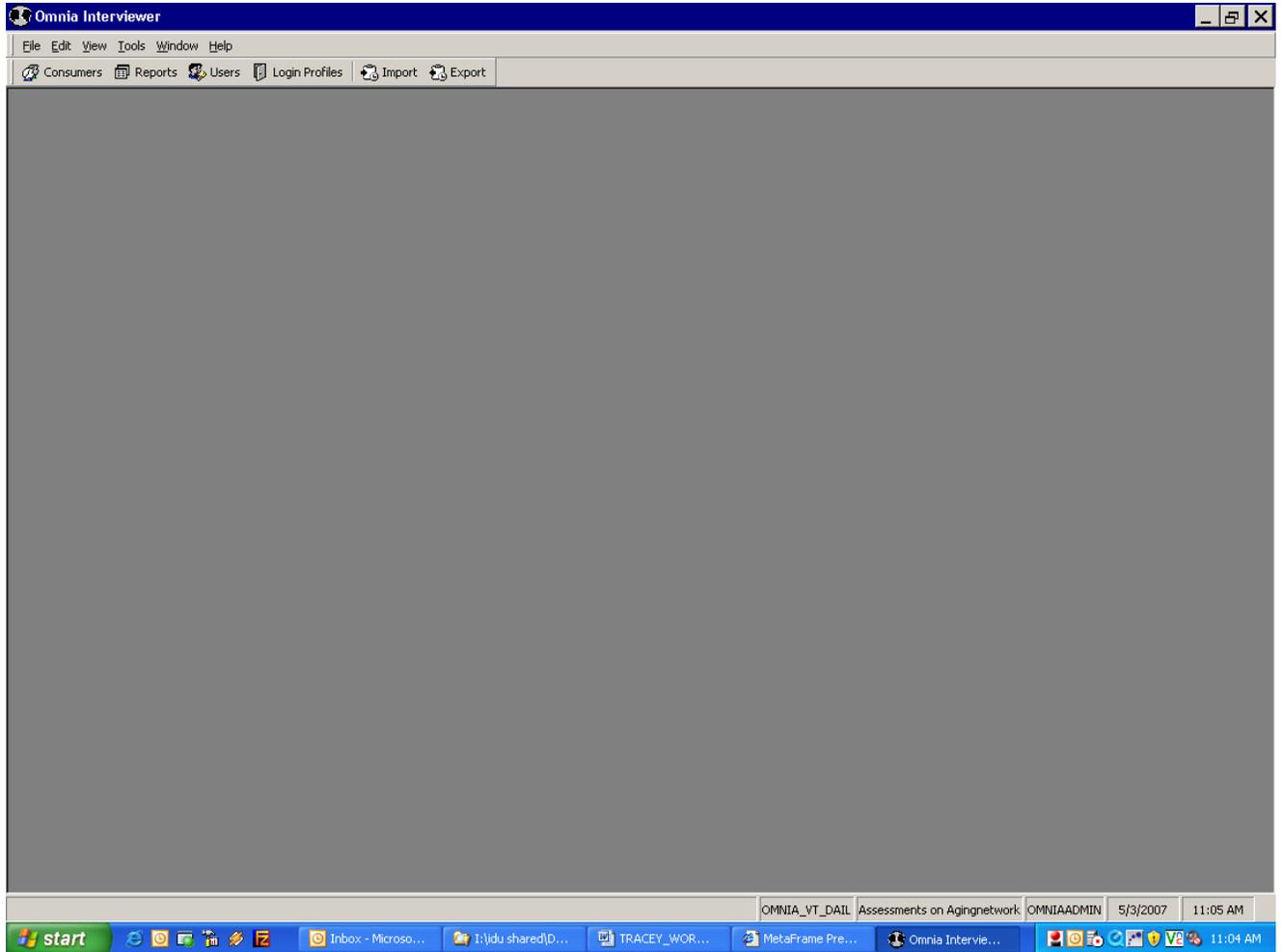
The Login Profile identifies the path where important files are located. **If you accidentally change anything in this section please press cancel and start over.**



After checking the Login Profile, go to the SAMS section. Make sure the “User SAMS Database?” field is set to “Yes”. The “SAMS Database” field must be set to “SAMS2K_VT_DAIL”.



After entering your OMNIA ID and password and checking that you have the correct login profile and the SAMS section is correct, click OK and you will see the screen below:



Click on Consumers to open the consumer listing. On the toolbar, pull down the Omnia dropdown shown below and change to SAMS. This will show all consumers in the SAMS database, not only those who are present with an assessment. This way, if a consumer does not already have an assessment, you can export just the consumer to your laptop and create the first assessment.

NOTE: You do not have to find individual consumers before exporting. However, you DO need to make sure that SAMS is chosen in the dropdown box as shown below. This will ensure you see all consumers and not just those with existing assessments. If you are not interested in looking at individual consumer details and only want to export, skip to the *Exporting Consumer from Agingnetwork to Laptop* section of this Guide.

Client ID	Last Name	First Name	MT	DOR	SSN	Active?
1341669/UC	Aardvark	Nancy	MT	06/18/1926	111-01-0000	<input checked="" type="checkbox"/>
101905555	Aardvark	Charity	M	01/01/1990	555-55-5555	<input type="checkbox"/>
1358631533	Aardvark	Julie	A			<input type="checkbox"/>
101061111	Aardvark	Alaysia		01/01/1906	111-11-1111	<input type="checkbox"/>
1124423333	Aardvark	Patrick Lifford		11/24/1942	333-33-3333	<input type="checkbox"/>
101485565	Aardvark	Jennifer		01/01/1948	555-55-5565	<input type="checkbox"/>
101485558	Aardvark	Toni		01/01/1948	555 55 5558	<input checked="" type="checkbox"/>
101495432	Aardvark	Jean		01/01/1949	112-34-5432	<input type="checkbox"/>
101331933	Aardvark	April		01/01/1933	000-00-1933	<input type="checkbox"/>
1366028994	Aardvark	Clark				<input type="checkbox"/>
101004495	Aardvark	Fetunia		01/01/1900	002-22-4495	<input type="checkbox"/>
1336526125	Aardvark	Anne		02/01/1946		<input type="checkbox"/>
101486566	Aardvark	George		01/01/1948	555-66-6666	<input checked="" type="checkbox"/>
101485567	Aardvark	Ereeda		01/01/1948	555-55-5567	<input checked="" type="checkbox"/>
104056705	Aardvark	Anabelle	Y	01/04/1935	120-45-6709	<input type="checkbox"/>
101485554	Aardvark	Mary	W	01/01/1948	555-55-5554	<input checked="" type="checkbox"/>
101485561	Aardvark	Maura		01/01/1948	555-55-5561	<input checked="" type="checkbox"/>
101228988	Aardvark	OMNIA	I	01/01/1922	888-88-8888	<input checked="" type="checkbox"/>
1212:26566	Aardvark	Lazarus		12/12/1912	556-66-6666	<input type="checkbox"/>
605171321	Aardvark	Tracey	A	06/05/1947	987 65 1321	<input type="checkbox"/>
201460033	Aardvark	Ann		02/01/1946	001-02-0033	<input type="checkbox"/>
101485556	Aardvark	Faula		01/01/1948	555-55-5556	<input checked="" type="checkbox"/>
101485562	Aardvark	Faultie		01/01/1948	555-55-5562	<input checked="" type="checkbox"/>
101485568	Aardvark	Julie	B	01/01/1948	555 55 5568	<input checked="" type="checkbox"/>
101440022	Aardvark	Abel	X	01/01/1944	000-00-0022	<input type="checkbox"/>
213260001	Aardvark	Hillary	R	02/13/1926	001-01-0001	<input type="checkbox"/>
101485557	Aardvark	Sara		01/01/1948	555-55-5557	<input checked="" type="checkbox"/>
225661111	Aardvark	John	P	03/25/1966	011-11-1111	<input type="checkbox"/>
101485553	Aardvark	Jessica		01/01/1948	555-55-5553	<input checked="" type="checkbox"/>
101485559	Aardvark	Sally		01/01/1948	555-55-5559	<input checked="" type="checkbox"/>
225605556	Aardvark	Helena		03/25/1960	123-45-5556	<input type="checkbox"/>
101405565	Aardvark	Celine		01/01/1940	555-55-5565	<input checked="" type="checkbox"/>
101485560	Aardvark	Mary	G	01/01/1948	555-55-5560	<input checked="" type="checkbox"/>
102443222	Aardvark	Lynn		01/02/1944	444-33-3222	<input type="checkbox"/>

4. Finding Individual Consumers/Creating Blank Assessment for Export

Open Consumer List

To see the consumers already in the database click on the Consumers button. After clicking on the Consumers button you will see the list of consumers in the database.

Omnia Interviewer [Consumers]

File Edit View Consumers Tools Window Help

Consumers Reports Users Login Profiles Import Export

Consumers

NEW Edit Delete Find SAMS Print Refresh

SAMS Editors (SAMS2K Omnia SAMS)

Client ID	Last Name	First Name	MT	DOR	SSN	Active?
1041669/UC	Aardvark	Nancy		06/18/1926	111-01-0000	<input checked="" type="checkbox"/>
101905555	Aardvark	Charity	M	01/01/1990	555-55-5555	<input type="checkbox"/>
1358631533	Aardvark	Julie	A			<input type="checkbox"/>
1010611111	Aardvark	Alaysia		01/01/1906	111-11-1111	<input type="checkbox"/>
1124423333	Aardvark	Patrick Lifford		11/24/1942	333-33-3333	<input type="checkbox"/>
101485566	Aardvark	Jennifer		01/01/1948	555-55-5565	<input type="checkbox"/>
101485555	Aardvark	Toni		01/01/1948	555 55 5558	<input checked="" type="checkbox"/>
101495432	Aardvark	Jean		01/01/1949	112-34-5432	<input type="checkbox"/>
101331333	Aardvark	April		01/01/1933	000-00-1933	<input type="checkbox"/>
1366028994	Aardvark	Clark				<input type="checkbox"/>
101304455	Aardvark	Fetunia		01/01/1930	002-22-4455	<input type="checkbox"/>
1336526125	Aardvark	Anne		02/01/1946		<input type="checkbox"/>
101486566	Aardvark	George		01/01/1948	555-66-6666	<input checked="" type="checkbox"/>
101465567	Aardvark	Erenda		01/01/1948	555-55-5567	<input checked="" type="checkbox"/>
104356705	Aardvark	Anabelle	Y	01/04/1935	120-45-6709	<input type="checkbox"/>
101485554	Aardvark	Mary	W	01/01/1948	555-55-5554	<input checked="" type="checkbox"/>
101485561	Aardvark	Maura		01/01/1948	555-55-5561	<input checked="" type="checkbox"/>
101228388	Aardvark	OMNIA	I	01/01/1922	888-88-8888	<input checked="" type="checkbox"/>
1212:26566	Aardvark	Lazarus		12/12/1912	556-66-6666	<input type="checkbox"/>
605171321	Aardvark	Tracey	A	06/05/1947	987 65 1321	<input type="checkbox"/>
201460333	Aardvark	Ann		02/01/1946	001-02-0033	<input type="checkbox"/>
101485556	Aardvark	Faula		01/01/1948	555-55-5556	<input checked="" type="checkbox"/>
101485562	Aardvark	FauleUe		01/01/1948	555-55-5562	<input checked="" type="checkbox"/>
101485566	Aardvark	Julie	B	01/01/1948	555 55 5568	<input checked="" type="checkbox"/>
101440322	Aardvark	Abel	X	01/01/1944	000-00-0022	<input type="checkbox"/>
213260001	Aardvark	Hillary	R	02/13/1926	001-01-0001	<input type="checkbox"/>
101485557	Aardvark	Sare		01/01/1948	555-55-5557	<input checked="" type="checkbox"/>
225661111	Aardvark	John	P	03/25/1966	011-11-1111	<input type="checkbox"/>
101485553	Aardvark	Jessica		01/01/1948	555-55-5553	<input checked="" type="checkbox"/>
101485559	Aardvark	Sally		01/01/1948	555-55-5559	<input checked="" type="checkbox"/>
225605556	Aardvark	Helena		03/25/1960	123-45-5558	<input type="checkbox"/>
101405560	Aardvark	Celine		01/01/1940	555-55-5560	<input checked="" type="checkbox"/>
101485560	Aardvark	Mary	G	01/01/1948	555-55-5560	<input checked="" type="checkbox"/>
102443222	Aardvark	Lynn		01/02/1944	444-33-3222	<input type="checkbox"/>

Find a Consumer

To find a consumer on the list click on the Find button and you will see a find box as shown below.

The screenshot shows the 'Omnia Interviewer - [Consumers]' application window. The menu bar includes File, Edit, View, Consumers, Tools, Window, and Help. The toolbar contains icons for Consumers, Reports, Users, Login Profiles, Import, and Export. Below the toolbar, there are buttons for New, Edit, Delete, Find, Print, and Refresh. The 'Find' button is highlighted, and a search box next to it contains the text 'SAMS'. The main area displays a table titled 'SAMS Consumers (SAMS2K_VT_DAIL)' with columns for Client ID, Last Name, First Name, MI, DOB, SSN, and Active?. The first row is selected, showing Client ID 1341669708, Last Name Aardvark, First Name Nancy, MI, DOB 08/18/1926, SSN 111-01-0000, and Active? checked. A 'Find Consumers' dialog box is open over the table, with a 'Find:' text box, a 'Search:' dropdown menu set to '(All)', and 'Find Next' and 'Cancel' buttons.

Client ID	Last Name	First Name	MI	DOB	SSN	Active?
1341669708	Aardvark	Nancy		08/18/1926	111-01-0000	<input checked="" type="checkbox"/>
101905555	Aardvark	Charity	M	01/01/1990	555-55-5555	<input type="checkbox"/>
1358631533	Aardvark	Julie	A			<input type="checkbox"/>
101061111	Aardvark	Aloysius		01/01/1906	111-11-1111	<input type="checkbox"/>
1124423333	Aardvark	Patrick Clifford		11/24/1942	333-33-3333	<input type="checkbox"/>
101485565	Aardvark	Jennifer		01/01/1948	555-55-5565	<input checked="" type="checkbox"/>
101485558	Aardvark	Toni		01/01/1948	555-55-5558	<input checked="" type="checkbox"/>
101495432	Aardvark	Jean		01/01/1949	112-34-5432	<input type="checkbox"/>
101331933	Aardvark	April		01/01/1933	000-00-1933	<input type="checkbox"/>
1366028994	Aardvark	Clark				<input type="checkbox"/>
101334455	Aardvark	Petunia		01/01/1933	002-22-4455	<input type="checkbox"/>
1336526125	Aardvark	Anne		02/01/1946		<input type="checkbox"/>
101486666	Aardvark	George		01/01/1948	555-66-6666	<input checked="" type="checkbox"/>
101485567	Aardvark	Brenda		01/01/1948	555-55-5567	<input checked="" type="checkbox"/>
104356789	Aardvark	Anabelle	Y	01/04/1935	123-45-6789	<input type="checkbox"/>
101485554	Aardvark	Mary	W	01/01/1948	555-55-5554	<input checked="" type="checkbox"/>
101485561	Aardvark	Maura		01/01/1948	555-55-5561	<input checked="" type="checkbox"/>
101228888	Aardvark	OMNIA	T	01/01/1922	888-88-8888	<input checked="" type="checkbox"/>
1212126666	Aardvark	Lazerus		12/12/1912	556-66-6666	<input type="checkbox"/>
605474321	Aardvark	Tracey	A	06/05/1947	987-65-4321	<input type="checkbox"/>
201460033	Aardvark	Ann		02/01/1946	001-02-0033	<input type="checkbox"/>
101485556	Aardvark	Paula		01/01/1948	555-55-5556	<input checked="" type="checkbox"/>
101485562	Aardvark	Paulette		01/01/1948	555-55-5562	<input checked="" type="checkbox"/>
101485568	Aardvark	Julie	B	01/01/1948	555-55-5568	<input checked="" type="checkbox"/>
101440022	Aardvark	Abel	X	01/01/1944	000-00-0022	<input type="checkbox"/>
213260001	Aardvark	Hiliary	R	02/13/1926	001-01-0001	<input type="checkbox"/>
101485557	Aardvark	Sara		01/01/1948	555-55-5557	<input checked="" type="checkbox"/>
325661111	Aardvark	John	P	03/25/1966	011-11-1111	<input type="checkbox"/>
101485553	Aardvark	Jessica		01/01/1948	555-55-5553	<input checked="" type="checkbox"/>
101485559	Aardvark	Sally		01/01/1948	555-55-5559	<input checked="" type="checkbox"/>
325605558	Aardvark	Helena		03/25/1960	123-45-5558	<input type="checkbox"/>
101485563	Aardvark	Celine		01/01/1948	555-55-5563	<input checked="" type="checkbox"/>
101485560	Aardvark	Mary	G	01/01/1948	555-55-5560	<input checked="" type="checkbox"/>
102443222	Aardvark	Aaron		01/02/1944	444-33-3222	<input type="checkbox"/>

This will allow you to search for consumers using several criteria. If you click on the arrow box in the search line you can choose specific criteria or you can leave the search at all.

The screenshot shows the 'Omnia Interviewer - [Consumers]' application window. The main window has a menu bar (File, Edit, View, Consumers, Tools, Window, Help) and a toolbar with icons for Consumers, Reports, Users, Login Profiles, Import, and Export. Below the toolbar is a 'Consumers' tab and a search bar containing 'SAMS'. A 'Find Consumers' dialog box is open, showing a search criteria dropdown menu with options: (All), Consumer ID, Last Name, First Name, Date of Birth, and Social Security Number. The 'Last Name' option is currently selected.

Client ID	Last Name	First Name	MI	DOB	SSN	Active?
1341669708	Aardvark	Nancy		08/18/1926	111-01-0000	<input checked="" type="checkbox"/>
101905555	Aardvark	Charity	M	01/01/1990	555-55-5555	<input type="checkbox"/>
1358631533	Aardvark	Julie	A			<input type="checkbox"/>
101061111	Aardvark	Aloysius		01/01/1906	111-11-1111	<input type="checkbox"/>
1124423333	Aardvark	Patrick Clifford		11/24/1942	333-33-3333	<input type="checkbox"/>
101485565	Aardvark	Jennifer		01/01/1948	555-55-5565	<input checked="" type="checkbox"/>
101485558	Aardvark	Toni		01/01/1948	555-55-5558	<input checked="" type="checkbox"/>
101495432	Aardvark	Jean		01/01/1949	112-34-5432	<input type="checkbox"/>
101331933	Aardvark	April		01/01/1933	000-00-1933	<input type="checkbox"/>
1366028994	Aardvark	Clark				<input type="checkbox"/>
101334455	Aardvark	Petunia		01/01/1933	002-22-4455	<input type="checkbox"/>
1336526125	Aardvark	Anne		02/01/1946		<input type="checkbox"/>
101486666	Aardvark	George		01/01/1948	555-66-6666	<input checked="" type="checkbox"/>
101485567	Aardvark	Brenda		01/01/1948	555-55-5567	<input checked="" type="checkbox"/>
104356789	Aardvark	Anabelle	Y	01/04/1935	123-45-6789	<input type="checkbox"/>
101485554	Aardvark	Mary	W	01/01/1948	555-55-5554	<input checked="" type="checkbox"/>
101485561	Aardvark	Maura		01/01/1948	555-55-5561	<input checked="" type="checkbox"/>
101228888	Aardvark	OMNIA	T	01/01/1922	888-88-8888	<input checked="" type="checkbox"/>
1212126666	Aardvark	Lazerus		12/12/1912	556-66-6666	<input type="checkbox"/>
605474321	Aardvark	Tracey	A	06/05/1947	987-65-4321	<input type="checkbox"/>
201460033	Aardvark	Ann		02/01/1946	001-02-0033	<input type="checkbox"/>
101485556	Aardvark	Paula		01/01/1948	555-55-5556	<input checked="" type="checkbox"/>
101485562	Aardvark	Paulette		01/01/1948	555-55-5562	<input checked="" type="checkbox"/>
101485568	Aardvark	Julie	B	01/01/1948	555-55-5568	<input checked="" type="checkbox"/>
101440022	Aardvark	Abel	X	01/01/1944	000-00-0022	<input type="checkbox"/>
213260001	Aardvark	Hiliary	R	02/13/1926	001-01-0001	<input type="checkbox"/>
101485557	Aardvark	Sara		01/01/1948	555-55-5557	<input checked="" type="checkbox"/>
325661111	Aardvark	John	P	03/25/1966	011-11-1111	<input type="checkbox"/>
101485553	Aardvark	Jessica		01/01/1948	555-55-5553	<input checked="" type="checkbox"/>
101485559	Aardvark	Sally		01/01/1948	555-55-5559	<input checked="" type="checkbox"/>
325605558	Aardvark	Helena		03/25/1960	123-45-5558	<input type="checkbox"/>
101485563	Aardvark	Celine		01/01/1948	555-55-5563	<input checked="" type="checkbox"/>
101485560	Aardvark	Mary	G	01/01/1948	555-55-5560	<input checked="" type="checkbox"/>
102443222	Aardvark	Aaron		01/02/1944	444-33-3222	<input type="checkbox"/>

For example, you can type in the consumer's last name and the search will go to the first consumer that meets that criteria. The example below is searching for an Aardvark.

The screenshot shows the 'Omnia Interviewer - [Consumers]' application window. The main window displays a table of consumers with columns: Client ID, Last Name, First Name, MI, DOB, SSN, and Active?. A 'Find Consumers' dialog box is open over the table. The dialog has a 'Find:' field containing 'Aardvark' and a 'Search:' dropdown menu set to 'Last Name'. The 'Find Next' button is highlighted, and the first row of the table, which contains 'Aardvark' in the Last Name column, is highlighted in blue.

Client ID	Last Name	First Name	MI	DOB	SSN	Active?
1341669708	Aardvark	Nancy		08/18/1926	111-01-0000	<input checked="" type="checkbox"/>
101905555	Aardvark	Charity	M	01/01/1990	555-55-5555	<input type="checkbox"/>
1358631533	Aardvark	Julie	A			<input type="checkbox"/>
101061111	Aardvark	Aloysius		01/01/1906	111-11-1111	<input type="checkbox"/>
1124423333	Aardvark	Patrick Clifford		11/24/1942	333-33-3333	<input type="checkbox"/>
101485565	Aardvark	Jennifer		01/01/1948	555-55-5565	<input checked="" type="checkbox"/>
101485558	Aardvark	Toni		01/01/1948	555-55-5558	<input checked="" type="checkbox"/>
101495432	Aardvark	Jean		01/01/1949	112-34-5432	<input type="checkbox"/>
101331933	Aardvark	April		01/01/1933	000-00-1933	<input type="checkbox"/>
1366028994	Aardvark	Clark				<input type="checkbox"/>
101334455	Aardvark	Petunia		01/01/1933	002-22-4455	<input type="checkbox"/>
1336526125	Aardvark	Anne		02/01/1946		<input type="checkbox"/>
101486666	Aardvark	George		01/01/1948	555-66-6666	<input checked="" type="checkbox"/>
101485567	Aardvark	Brenda		01/01/1948	555-55-5567	<input checked="" type="checkbox"/>
104356789	Aardvark	Anabelle	Y	01/04/1935	123-45-6789	<input type="checkbox"/>
101485554	Aardvark	Mary	W	01/01/1948	555-55-5554	<input checked="" type="checkbox"/>
101485561	Aardvark	Maura		01/01/1948	555-55-5561	<input checked="" type="checkbox"/>
101228888	Aardvark	OMNIA	T	01/01/1922	888-88-8888	<input checked="" type="checkbox"/>
1212126666	Aardvark	Lazerus		12/12/1912	556-66-6666	<input type="checkbox"/>
605474321	Aardvark	Tracey	A	06/05/1947	987-65-4321	<input type="checkbox"/>
201460033	Aardvark	Ann		02/01/1946	001-02-0033	<input type="checkbox"/>
101485556	Aardvark	Paula		01/01/1948	555-55-5556	<input checked="" type="checkbox"/>
101485562	Aardvark	Paulette		01/01/1948	555-55-5562	<input checked="" type="checkbox"/>
101485568	Aardvark	Julie	B	01/01/1948	555-55-5568	<input checked="" type="checkbox"/>
101440022	Aardvark	Abel	X	01/01/1944	000-00-0022	<input type="checkbox"/>
213260001	Aardvark	Hiliary	R	02/13/1926	001-01-0001	<input type="checkbox"/>
101485557	Aardvark	Sara		01/01/1948	555-55-5557	<input checked="" type="checkbox"/>
325661111	Aardvark	John	P	03/25/1966	011-11-1111	<input type="checkbox"/>
101485553	Aardvark	Jessica		01/01/1948	555-55-5553	<input checked="" type="checkbox"/>
101485559	Aardvark	Sally		01/01/1948	555-55-5559	<input checked="" type="checkbox"/>
325605558	Aardvark	Helena		03/25/1960	123-45-5558	<input type="checkbox"/>
101485563	Aardvark	Celine		01/01/1948	555-55-5563	<input checked="" type="checkbox"/>
101485560	Aardvark	Mary	G	01/01/1948	555-55-5560	<input checked="" type="checkbox"/>
102443222	Aardvark	Aaron		01/02/1944	444-33-3222	<input type="checkbox"/>

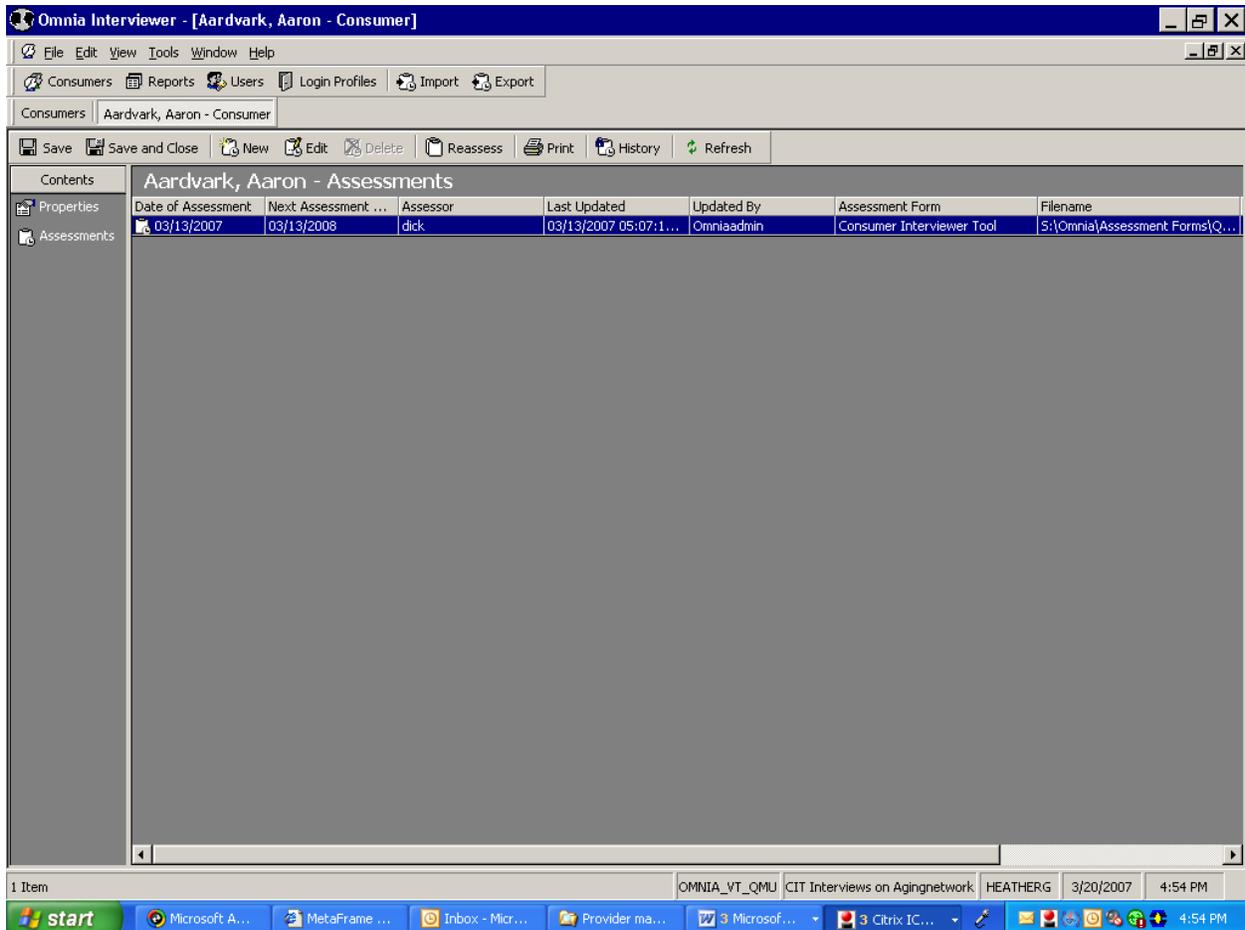
The highlighted consumer is the first aardvark found. If that is not the one you want click Find Next and the next aardvark will be highlighted. Keep clicking Find Next until you find the consumer you want to look at. Cancel the find box when you have found your consumer. Keep in mind that, for confidentiality reason, we had to initially limit the consumer list to the test "Aardvark" family. This is why we only see the Aardvarks in these examples.

NOTE: If you cannot find the consumer by Last Name, try to find the consumer by the Social Security Number. To do this, type the SSN, with hyphens, in the Find field and choose Social Security Number in the Search field.

IMPORTANT: NEVER create a new consumer in Omnia. This must ALWAYS be done in SAMS for consistency.

Opening existing consumer

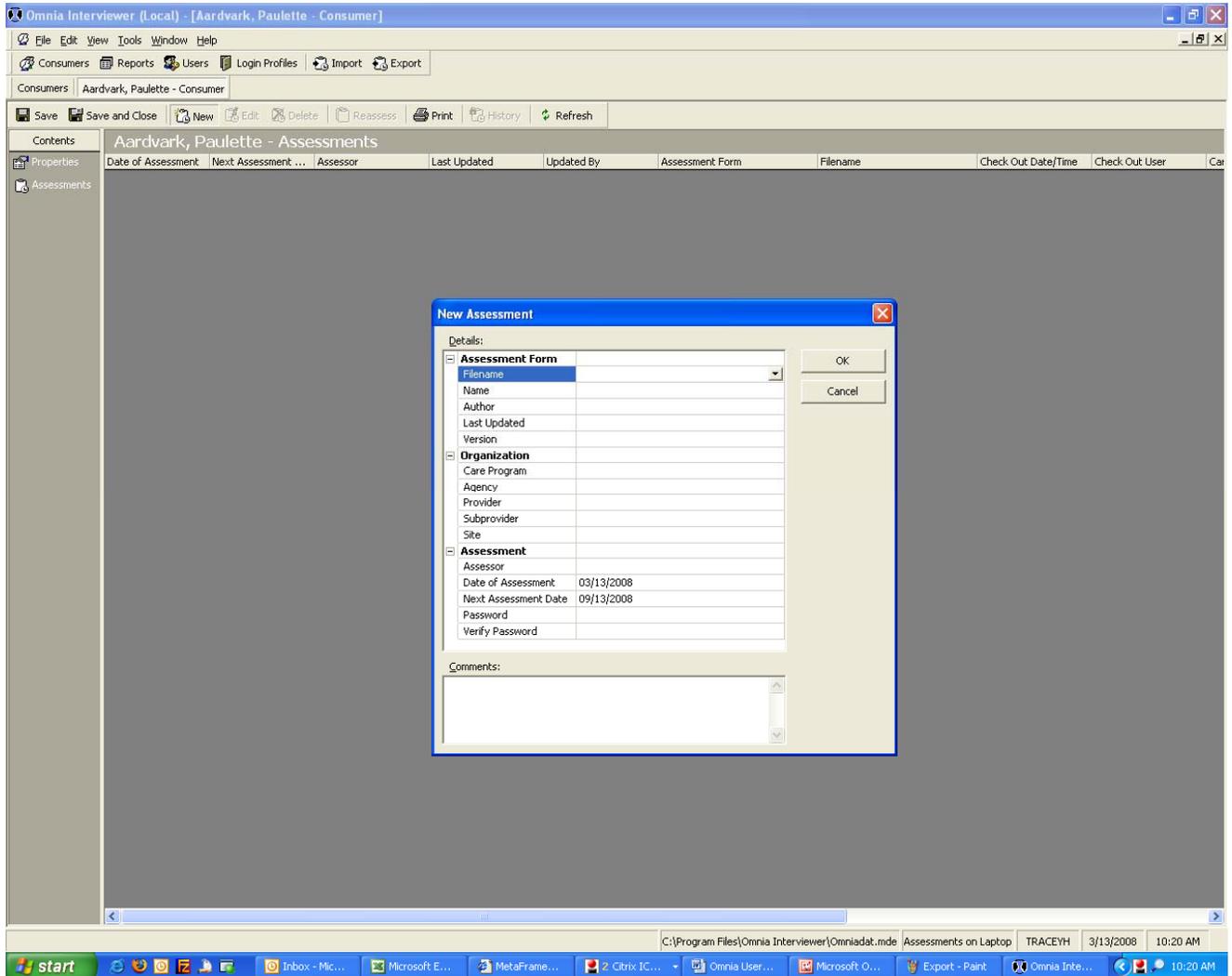
When the consumer you want is highlighted you can double-click on it to open the record. When the consumer is opened, you will see the screen below



This screen shows there is one assessment done for this consumer. When you double-click on the highlighted assessment, that assessment will open.

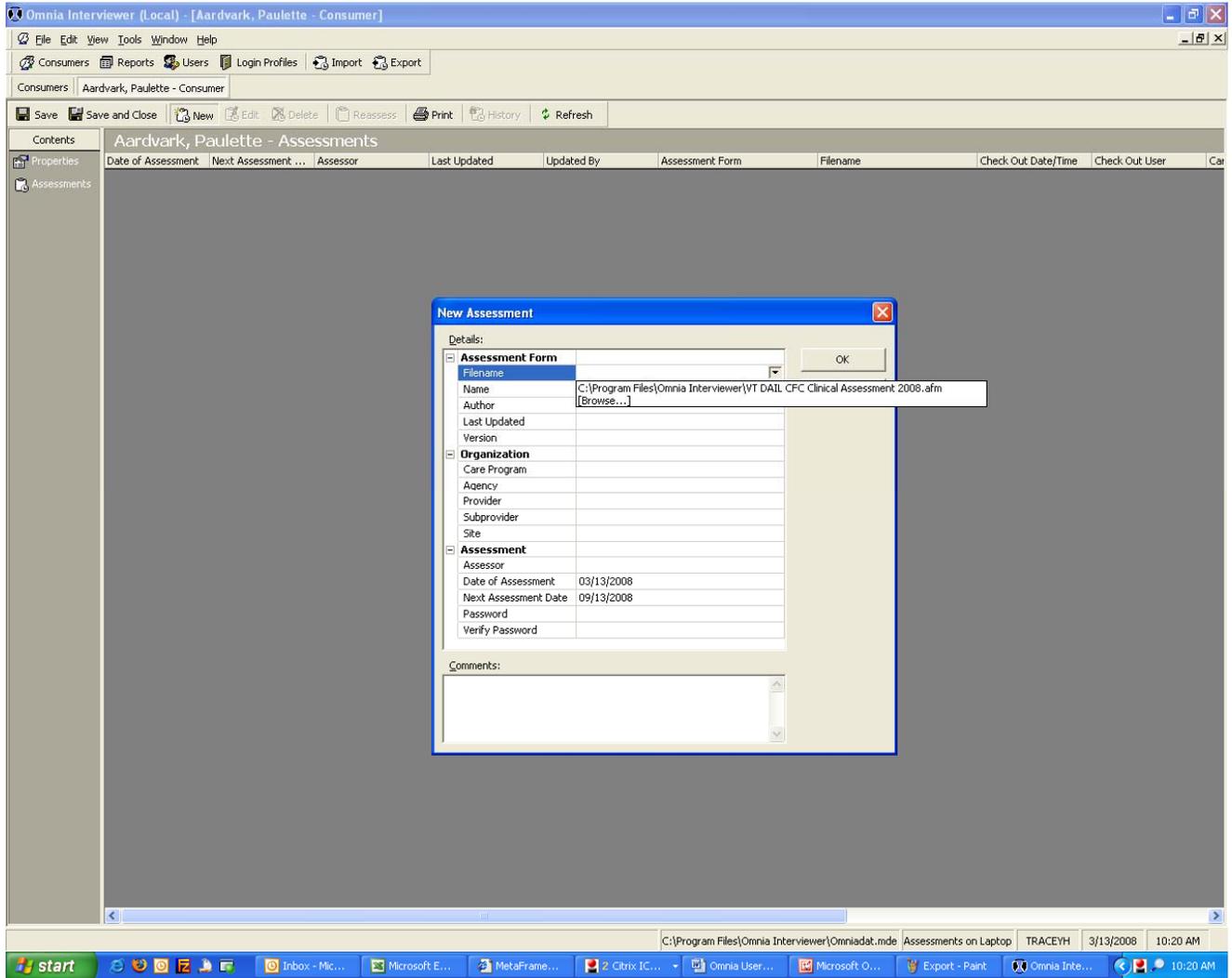
Create New Blank Assessment on Consumer

To create a new assessment, open the consumer and click the New button. After clicking new you will see the following screen.



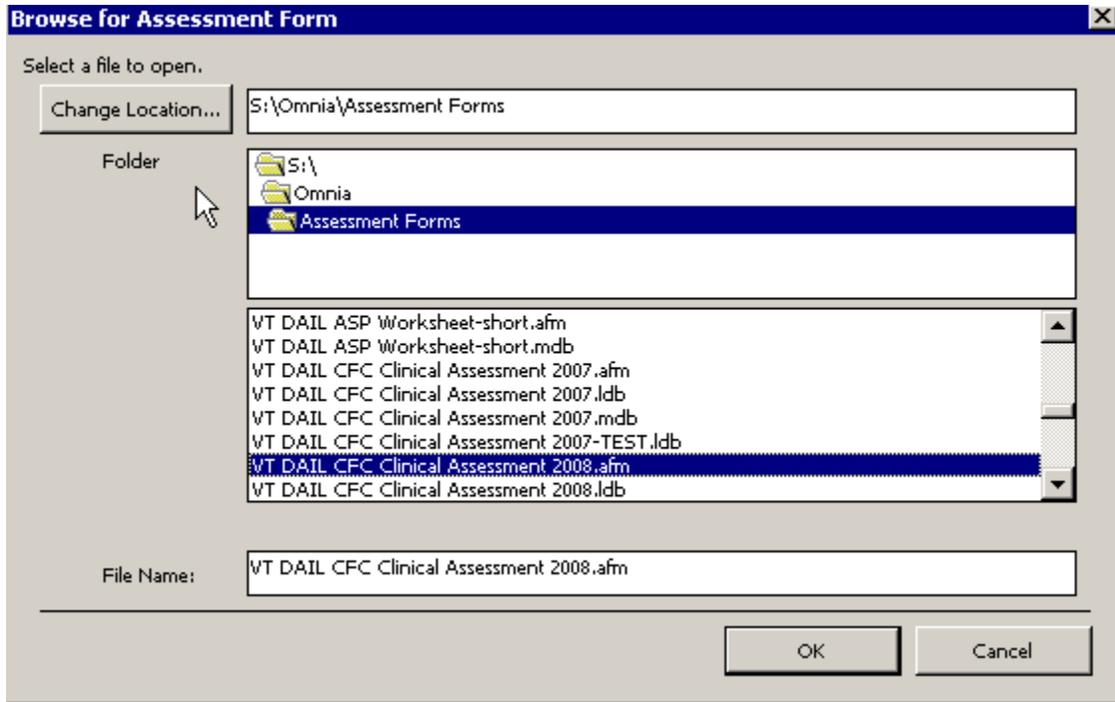
NOTE: NEVER enter a password on an assessment!!!

There are many assessment forms that can be created for OMNIA Interviewer and this screen allows you to choose which form you want. Click on the arrow box in the filename line and you will find forms from which to choose. The form you will use will depend on the type of assessment and also your organization.



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 (this location should automatically populate the “Location” section). Choose the appropriate assessment form in the lower section and click OK.

NOTE: These steps are only for use when browsing for the form on Agingnetwork. If you were to add an assessment while on your laptop, you would browse to a different location.



The next step is to enter the Organization information for security of the assessment. Pull down the Agency dropdown list and choose your Agency. Next, enter the date the assessment is being completed. The Next Assessment Date should automatically populate based on user 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.**

New Assessment

Details:

Assessment Form	
Filename	S:\Omnia\Assessment Forms\VT DAIL CF...
Name	VT DAIL CFC Clinical
Author	Dick Lavery
Last Updated	3/12/2008 2:06:09 PM
Version	1.11
Organization	
Care Program	
Agency	Department Of Aging And Disabilities
Provider	
Subprovider	
Site	
Assessment	
Assessor	Tracey Harrington
Date of Assessment	05/29/2008
Next Assessment Date	
Password	
Verify Password	

Comments:
Comments go here.

Click OK and the following message will appear. Say "Yes" to save and the assessment will open.

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

NOTE: ONCE THE ASSESSMENT OPENS, CLICK SAVE AND CLOSE. REPEAT FOR EACH CONSUMER YOU WILL BE ASSESSING. MOVE ON TO SECTION 5 EXPORTING CONSUMERS FROM AGINGNETWORK TO LAPTOP.

Opening existing assessment

When the assessment is opened you will see the assessment as shown below.

The screenshot displays the Omnia Interviewer application window titled "Assessment - Aardvark, Aaron [4/23/2007]". The interface is divided into several sections:

- Menu Bar:** File, Edit, View, Assessment, Tools, Window, Help.
- Toolbar:** Consumers, Reports, Users, Login Profiles, Import, Export.
- Navigation Pane (Left):** A tree view showing the assessment structure. The selected section is "0.A. INDIVIDUAL IDENTIFICATION".
- Main Data Entry Area (Right):** A table of questions and answers for the "0.A. INDIVIDUAL IDENTIFICATION" section.

Question	Answer
0. ILA is being completed for which program?	E. Medicaid Waiver (Choices for Care)
1. Date of assessment?	04/23/2007
2. Unique ID# for client.	102443222
3.a. Client's last name?	Aardvark
3.b. Client's first name?	Aaron
3.c. Client's middle initial?	
4. Client's telephone number.	802-878-8514
5. Client's Social Security Number?	444-33-3222
6. Client's date of birth?	01/02/1944
calculated age at assessment	63.3045859000684
7. Client's gender?	M. Male
8.a. Client's mailing street address or Post Office box.	13 Deadend Lane
8.b. Client's mailing city or town.	Essex Junction
8.c. Client's mailing state.	VT
8.d. Client's mailing ZIP code.	05452
9.a. Client's residential street address or Post Office box.	13 deadend lane
9.b. Client's residential city or town.	Essex
9.c. Client's state of residence.	VT

The Windows taskbar at the bottom shows the Start button, several open applications (Inbox, TRACEY, MetaFram, Omnia Inte...), and the system tray with the date 5/3/2007 and time 12:35 PM.

5. Exporting Consumers From Agingnetwork to Laptop

Exporting and importing should only occur when your laptop is logged into Agingnetwork.com. Exporting is the process to take consumers on Agingnetwork (the main database) and place them onto a local laptop in order to perform an assessment in the field. When the assessment is done, the information will then be imported back into Agingnetwork (the main database). When you login to Agingnetwork.com your login profile should always be "Assessments on Agingnetwork". When you are exporting, you will always export to the login profile "Assessments on Laptop".

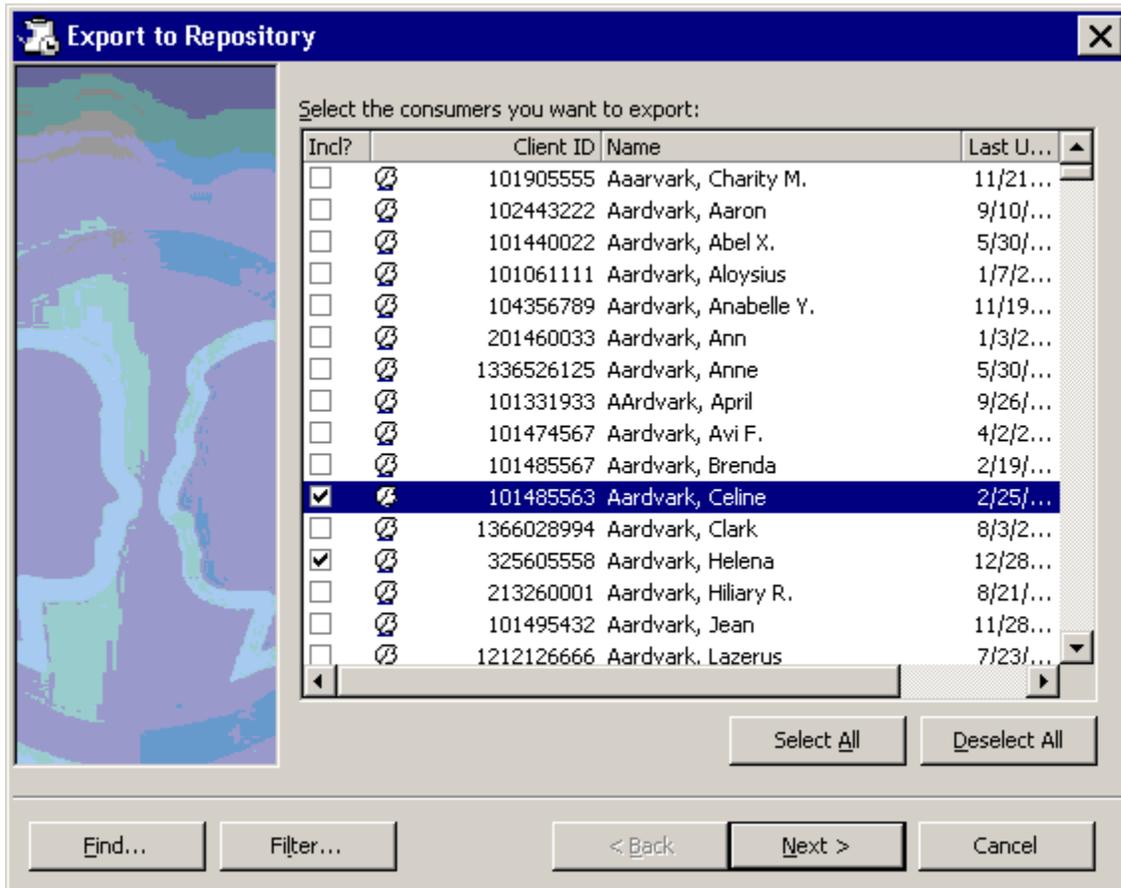
From the consumer listing screen, click on the Export button to begin exporting.

The screenshot shows the 'Omnia Interviewer - [Consumers]' application window. The menu bar includes File, Edit, View, Consumers, Tools, Window, and Help. The main toolbar contains buttons for Consumers, Reports, Users, Login Profiles, Import, and Export. Below the toolbar, there is a search bar with 'SAMS' entered and a 'Find' button. The main area displays a table titled 'SAMS Consumers (SAMS2K_VT_DAIL)'. The table has columns for Client ID, Last Name, First Name, MI, DOB, SSN, and Active?. The 'Active?' column contains checkboxes, many of which are checked. The table lists various consumers, including Nancy Aardvark, Charity Aardvark, Julie Aardvark, Aloysius Aardvark, Patrick Clifford Aardvark, Jennifer Aardvark, Toni Aardvark, Jean Aardvark, April Aardvark, Clark Aardvark, Petunia Aardvark, Anne Aardvark, George Aardvark, Brenda Aardvark, Anabelle Aardvark, Mary Aardvark, Maura Aardvark, OMNIA Aardvark, Lazerus Aardvark, Tracey Aardvark, Ann Aardvark, Paula Aardvark, Paulette Aardvark, Julie Aardvark, Abel Aardvark, Hiliary Aardvark, Sara Aardvark, John Aardvark, Jessica Aardvark, Sally Aardvark, Helena Aardvark, Celine Aardvark, Mary Aardvark, and Aaron Aardvark.

Client ID	Last Name	First Name	MI	DOB	SSN	Active?
1341669708	Aardvark	Nancy		08/18/1926	111-01-0000	<input checked="" type="checkbox"/>
101905555	Aardvark	Charity	M	01/01/1990	555-55-5555	<input type="checkbox"/>
1358631533	Aardvark	Julie	A			<input type="checkbox"/>
101061111	Aardvark	Aloysius		01/01/1906	111-11-1111	<input type="checkbox"/>
1124423333	Aardvark	Patrick Clifford		11/24/1942	333-33-3333	<input type="checkbox"/>
101485565	Aardvark	Jennifer		01/01/1948	555-55-5565	<input checked="" type="checkbox"/>
101485558	Aardvark	Toni		01/01/1948	555-55-5558	<input checked="" type="checkbox"/>
101495432	Aardvark	Jean		01/01/1949	112-34-5432	<input type="checkbox"/>
101331933	Aardvark	April		01/01/1933	000-00-1933	<input type="checkbox"/>
1366028994	Aardvark	Clark				<input type="checkbox"/>
101334455	Aardvark	Petunia		01/01/1933	002-22-4455	<input type="checkbox"/>
1336526125	Aardvark	Anne		02/01/1946		<input type="checkbox"/>
101486666	Aardvark	George		01/01/1948	555-66-6666	<input checked="" type="checkbox"/>
101485567	Aardvark	Brenda		01/01/1948	555-55-5567	<input checked="" type="checkbox"/>
104356789	Aardvark	Anabelle	Y	01/04/1935	123-45-6789	<input type="checkbox"/>
101485554	Aardvark	Mary	W	01/01/1948	555-55-5554	<input checked="" type="checkbox"/>
101485561	Aardvark	Maura		01/01/1948	555-55-5561	<input checked="" type="checkbox"/>
101228888	Aardvark	OMNIA	T	01/01/1922	888-88-8888	<input checked="" type="checkbox"/>
1212126666	Aardvark	Lazerus		12/12/1912	556-66-6666	<input type="checkbox"/>
605474321	Aardvark	Tracey	A	06/05/1947	987-65-4321	<input type="checkbox"/>
201460033	Aardvark	Ann		02/01/1946	001-02-0033	<input type="checkbox"/>
101485556	Aardvark	Paula		01/01/1948	555-55-5556	<input checked="" type="checkbox"/>
101485562	Aardvark	Paulette		01/01/1948	555-55-5562	<input checked="" type="checkbox"/>
101485568	Aardvark	Julie	B	01/01/1948	555-55-5568	<input checked="" type="checkbox"/>
101440022	Aardvark	Abel	X	01/01/1944	000-00-0022	<input type="checkbox"/>
213260001	Aardvark	Hiliary	R	02/13/1926	001-01-0001	<input type="checkbox"/>
101485557	Aardvark	Sara		01/01/1948	555-55-5557	<input checked="" type="checkbox"/>
325661111	Aardvark	John	P	03/25/1966	011-11-1111	<input type="checkbox"/>
101485553	Aardvark	Jessica		01/01/1948	555-55-5553	<input checked="" type="checkbox"/>
101485559	Aardvark	Sally		01/01/1948	555-55-5559	<input checked="" type="checkbox"/>
325605558	Aardvark	Helena		03/25/1960	123-45-5558	<input type="checkbox"/>
101485563	Aardvark	Celine		01/01/1948	555-55-5563	<input checked="" type="checkbox"/>
101485560	Aardvark	Mary	G	01/01/1948	555-55-5560	<input checked="" type="checkbox"/>
102443222	Aardvark	Aaron		01/02/1944	444-33-3222	<input type="checkbox"/>

Choosing Consumer to Export

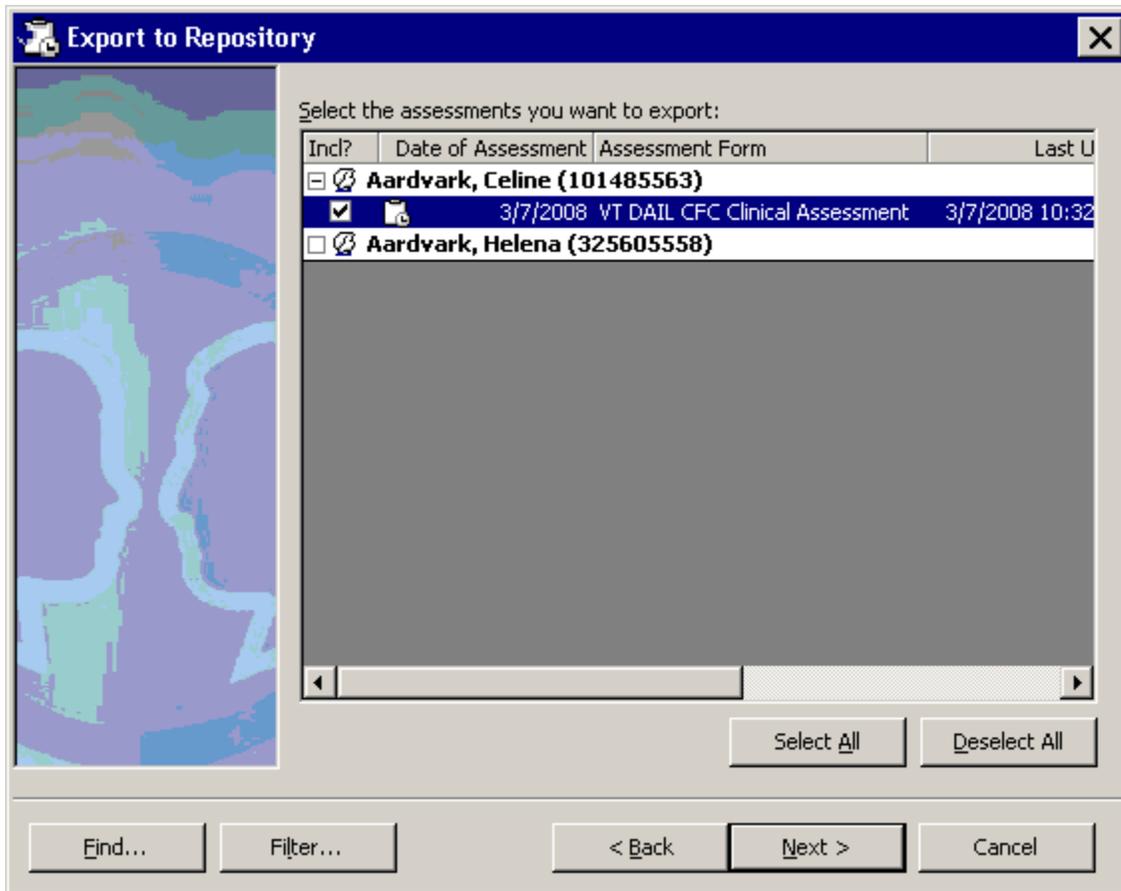
When you click export you will see the screen below which will show the consumers in your database that can be exported. To export your consumers to your laptop, you must know who the consumers are before you begin exporting. Then you can click on the consumers you want (from the list). Choose as many consumers as you need to assess. See selected consumers below. After you have selected your consumers, click Next



Choosing Assessments to Export

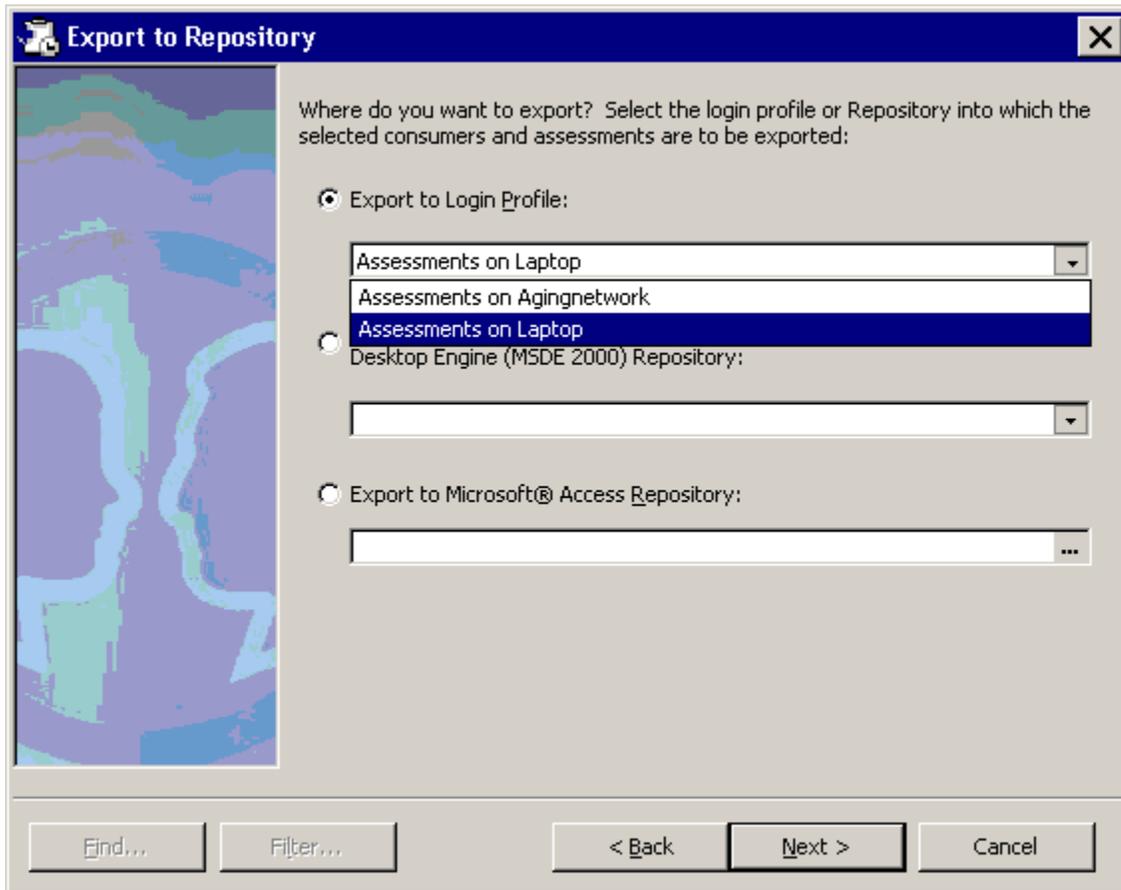
This screen shows the assessments available to be exported. Generally each consumer may have many assessments and you may only want to export a few of these assessments or just the most recent one. Choose at least the assessment created in Section 4 by clicking the check box to the left of the assessment. When all desired assessments are chosen, click Next.

Keep in mind that exporting a previous assessment will allow you to reassess from that assessment to create the current assessment.



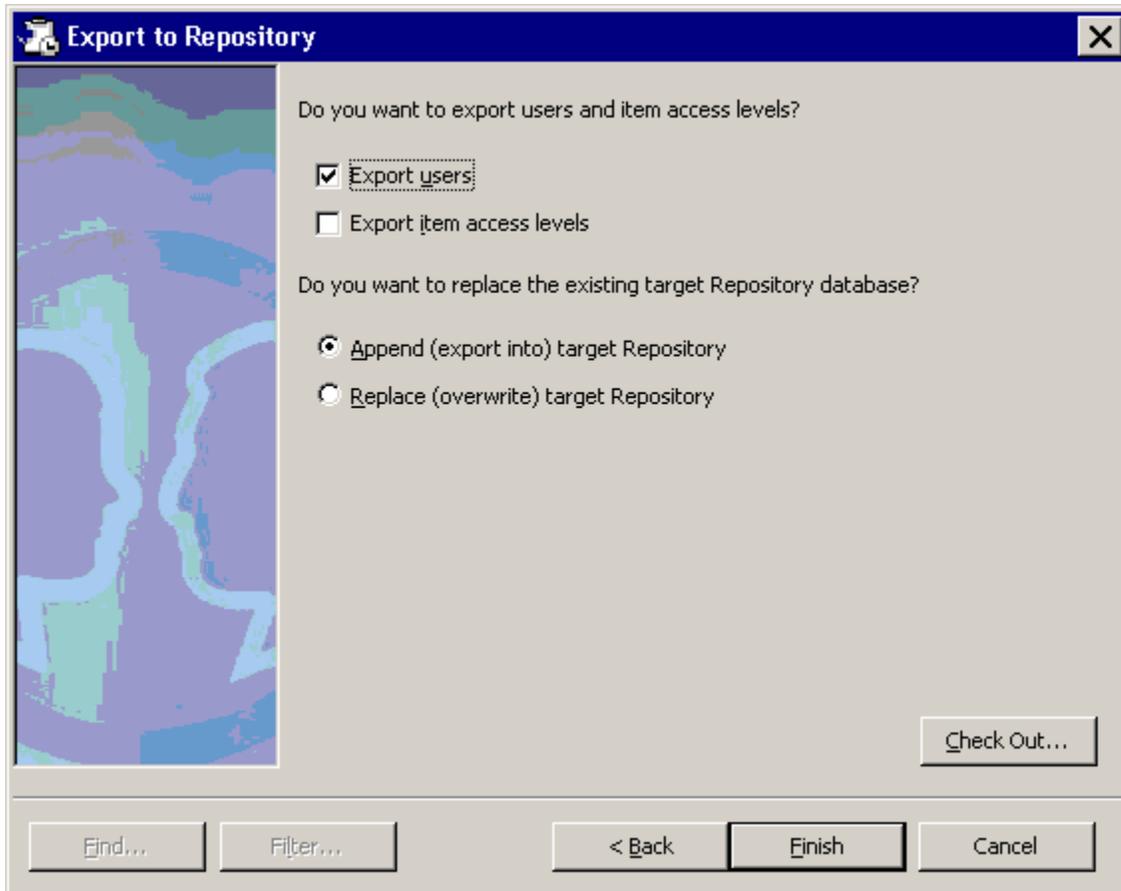
Exporting to Login Profile:

You should click on the arrow box in the “Export to Login Profile” option. There are two choices here: 1. Assessments on Agingnetwork and 2. Assessments on Laptop. You will always export to “Assessments on Laptop”.



Click on the Export to Login Profile choice of Assessments on Laptop and click Next.

After clicking Next, you will then see the following screen:



Be sure that “Export Item Access Levels” is NOT checked (click to toggle on or off). Click on “Export Users” and “Append (export into) target Repository”. These are the only two boxes that should be checked. **DO NOT click on the “Check Out...” button.**

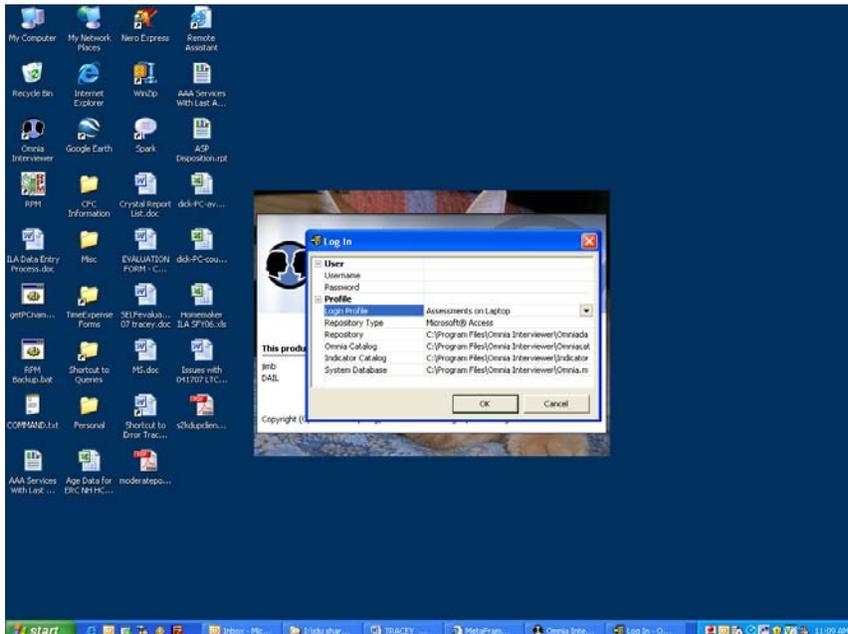
Click Finish and you will see the following screen.



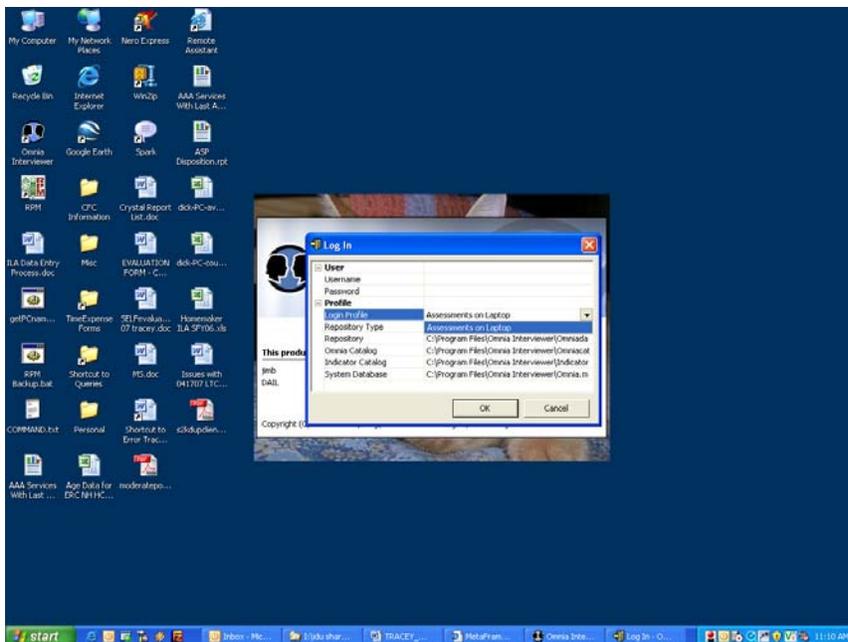
Click OK and you will return to the consumer screen.

6. OMNIA Interviewer Login on Laptop

You can run OMNIA Interviewer as a stand alone database when you are not connected to Agingnetwork.com. To open OMNIA Interviewer on the laptop click on the OMNIA Interviewer icon on your desktop screen.



The login process from this point is the same as the Omnia login on Agingnetwork.com except your login profile should be "Assessments on Laptop" because you are logging into the database on your laptop, not connecting to the main database on agingnetwork.com.



The login profile "Assessments on Laptop" should be the default when you use your laptop, but always check that this login profile is chosen. If this login profile is not chosen, you will not be able to log in. Enter your ID and password (This will be the same as for logging into OMNIA on Agingnetwork.com).

The login profile identifies the path where important files are located. **If you accidentally change anything in this Profile section please press cancel and start over.**

7. Entering/Editing Assessment Data

Opening the form

Lookup the consumer you are assessing using the Find function (Section 4). Double click the consumer to open and double click on the Blank Assessment Form that was exported.

Question	Answer
0. ILA is being completed for which program?	E. Medicaid Waiver (Choices for Care)
1. Date of assessment?	04/23/2007
2. Unique ID# for client.	102443222
3.a. Client's last name?	Aardvark
3.b. Client's first name?	Aaron
3.c. Client's middle initial?	
4. Client's telephone number.	802-878-8514
5. Client's Social Security Number?	444-33-3222
6. Client's date of birth?	01/02/1944
calculated age at assessment	63.3045859000684
7. Client's gender?	M. Male
8.a. Client's mailing street address or Post Office box.	13 Deadend Lane
8.b. Client's mailing city or town.	Essex Junction
8.c. Client's mailing state.	VT
8.d. Client's mailing ZIP code.	05452
9.a. Client's residential street address or Post Office box.	13 deadend lane
9.b. Client's residential city or town.	Essex
9.c. Client's state of residence.	VT

General description of form layout

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

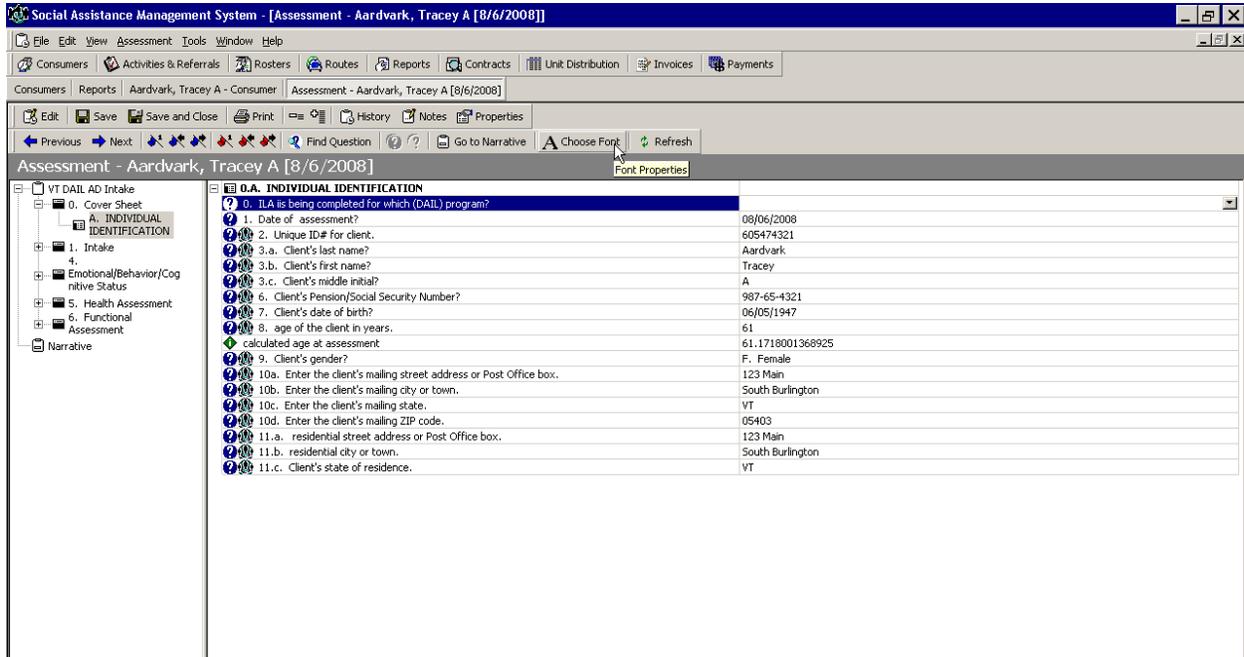
If you click on the right hand section, all the questions in the form will be shown in the right hand area. You can go down sequentially through these questions using the down arrow on the keyboard or go back up with the up arrow.

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

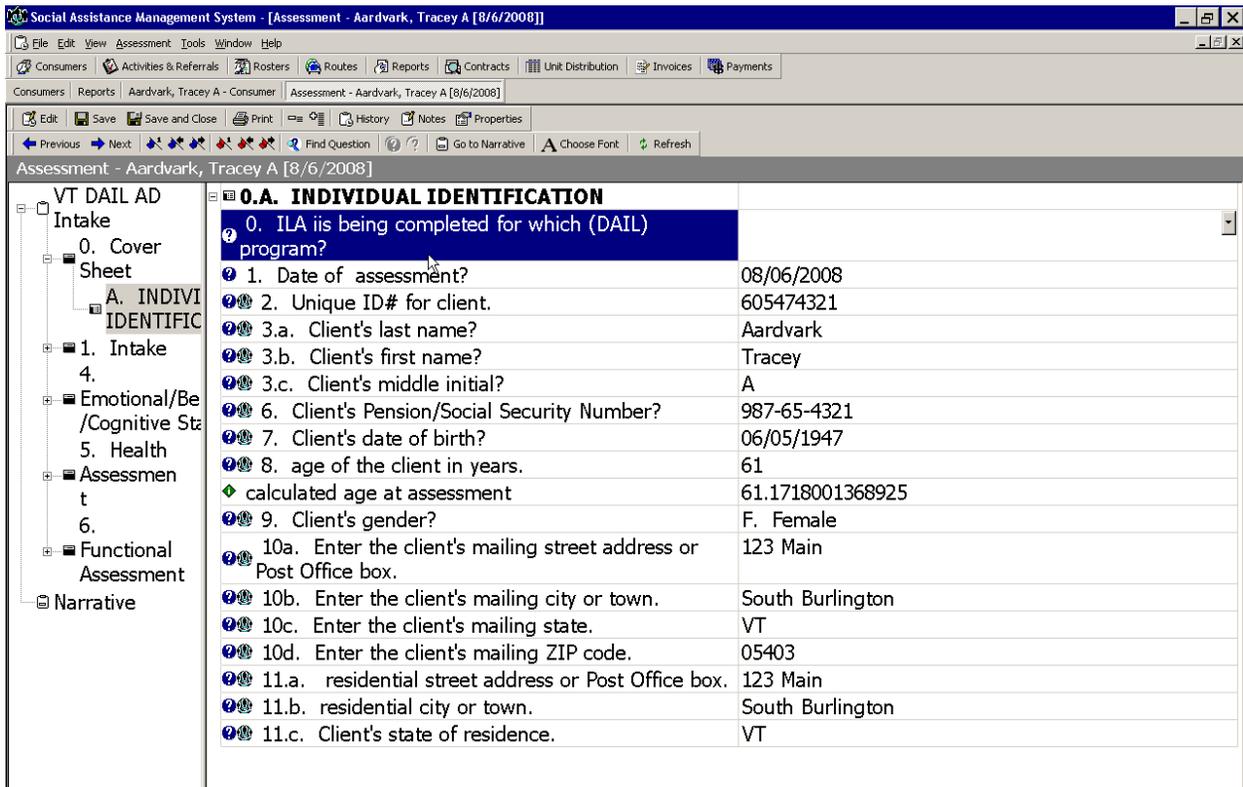
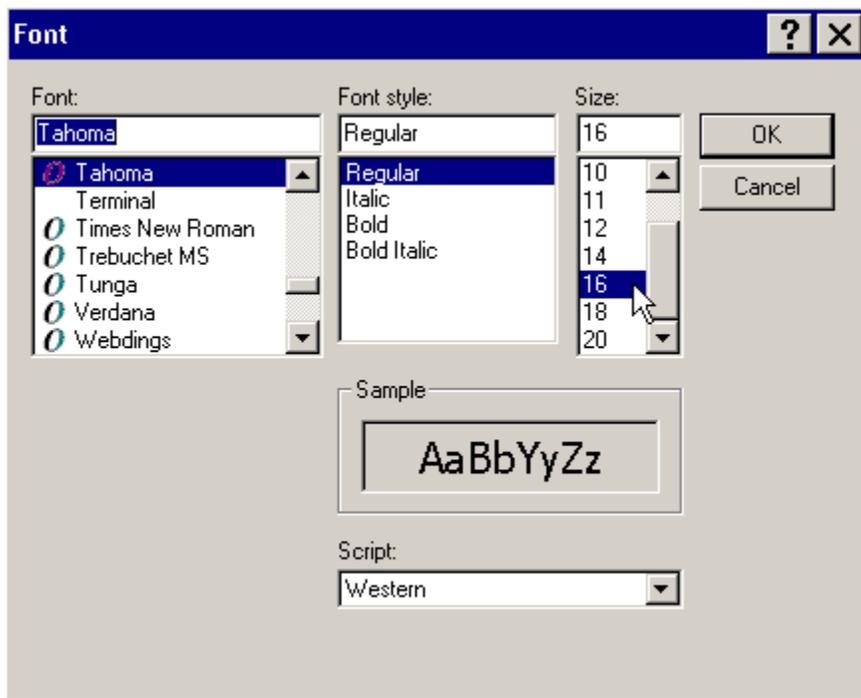
Skip functions are built in so that some questions will be skipped if they are not relevant based on a previous answer. For example if someone says they do not have a legal guardian the questions asking about the name of the guardian will be skipped. However, the system will still allow the user to go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

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.



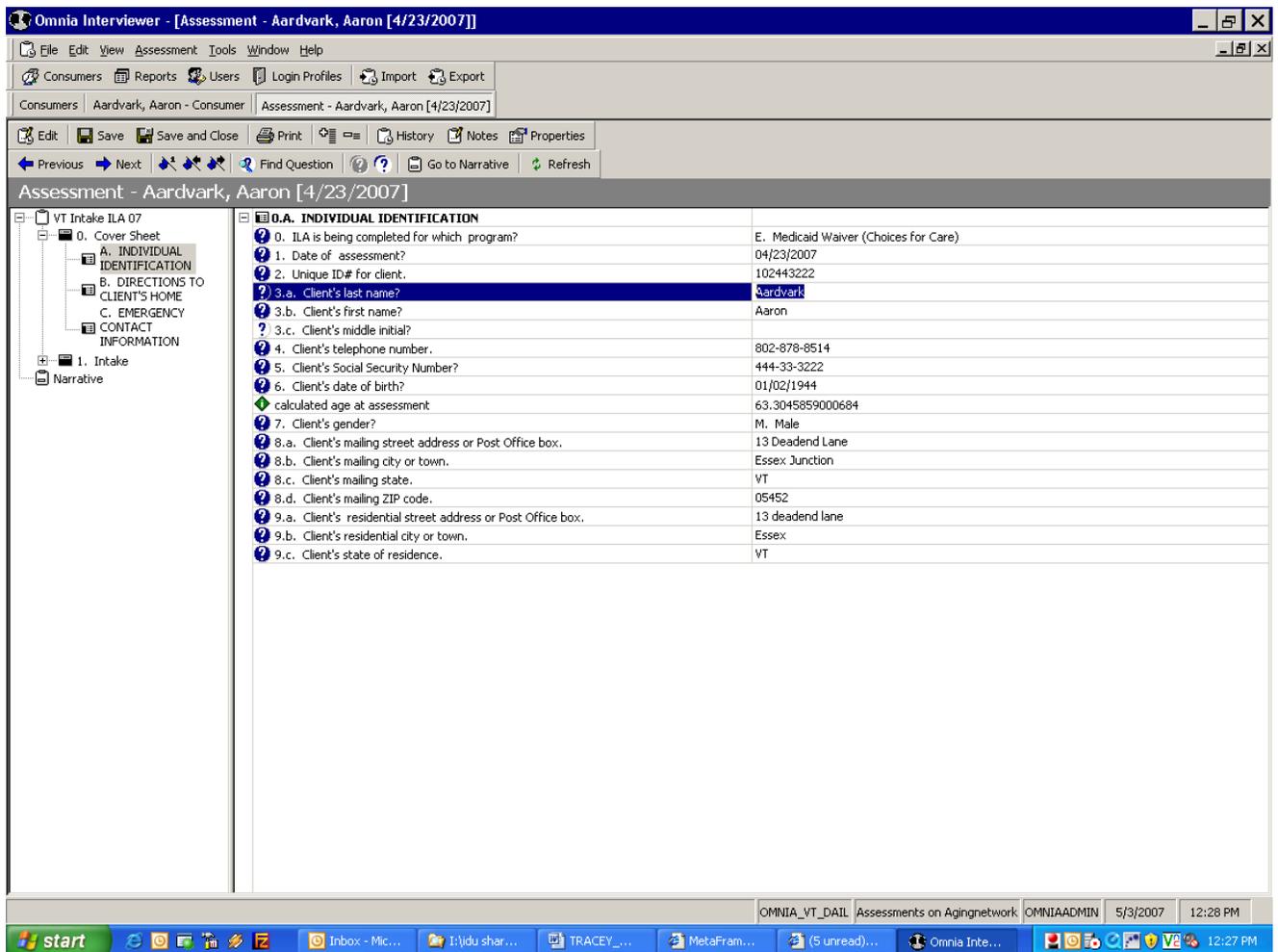
The following box will appear. Choose the font and font size you wish to see and click OK.



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:



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.

The screenshot shows the Omnia Interviewer application window. The title bar reads "Omnia Interviewer - [Assessment - Aardvark, Aaron [4/23/2007]]". The menu bar includes File, Edit, View, Assessment, Tools, Window, and Help. The toolbar contains icons for File operations (Consumers, Reports, Users, Login Profiles, Import, Export), editing (Edit, Save, Save and Close, Print, History, Notes, Properties), and navigation (Previous, Next, Find Question, Go to Narrative, Refresh). The main window displays the assessment form for "Aardvark, Aaron [4/23/2007]".

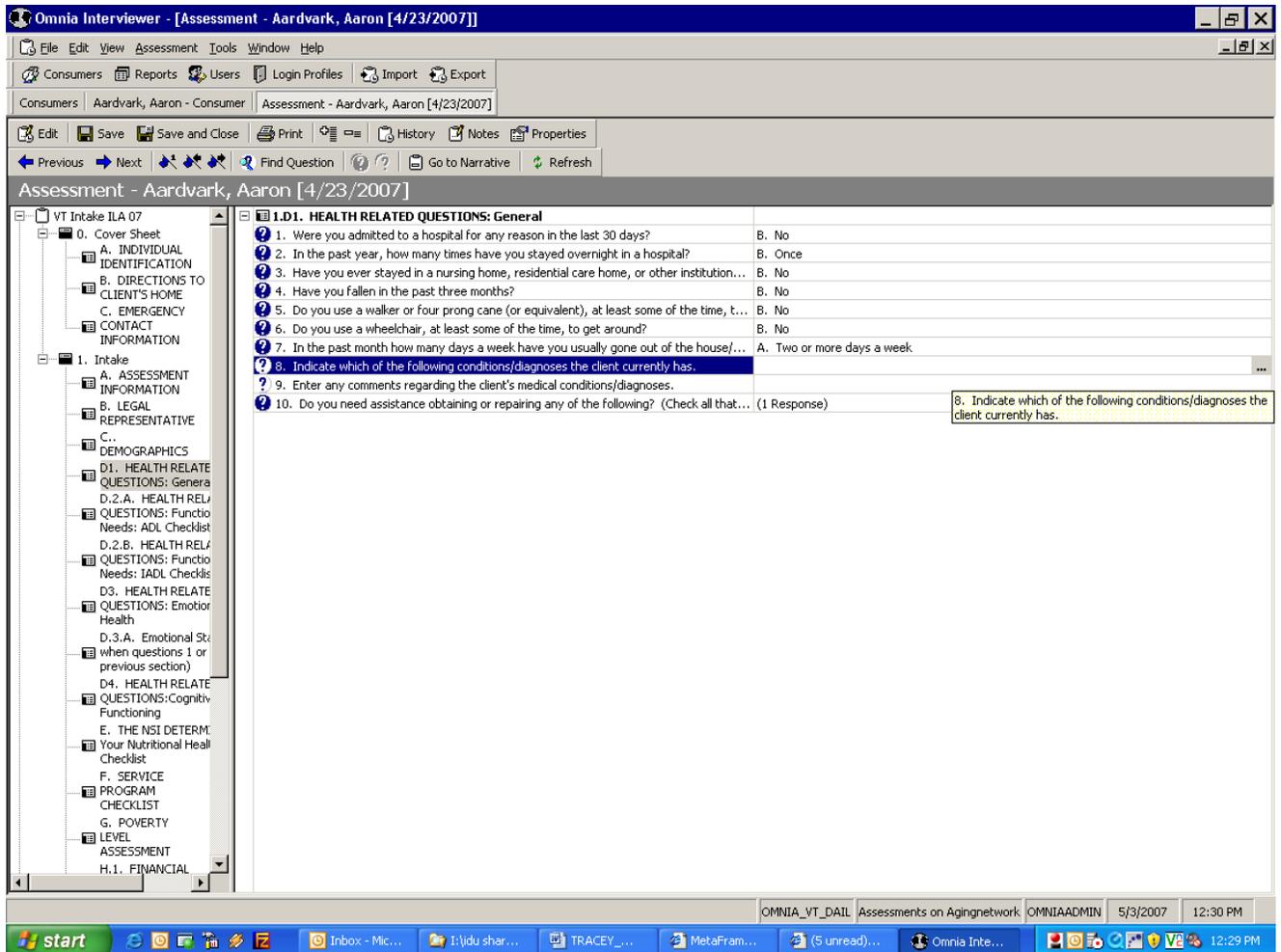
The form is organized into sections. On the left, a tree view shows the structure: VT Intake ILA 07, 0. Cover Sheet, A. INDIVIDUAL IDENTIFICATION (selected), B. DIRECTIONS TO CLIENT'S HOME, C. EMERGENCY CONTACT INFORMATION, 1. Intake, and Narrative. The main area shows the "0.A. INDIVIDUAL IDENTIFICATION" section with the following questions and answers:

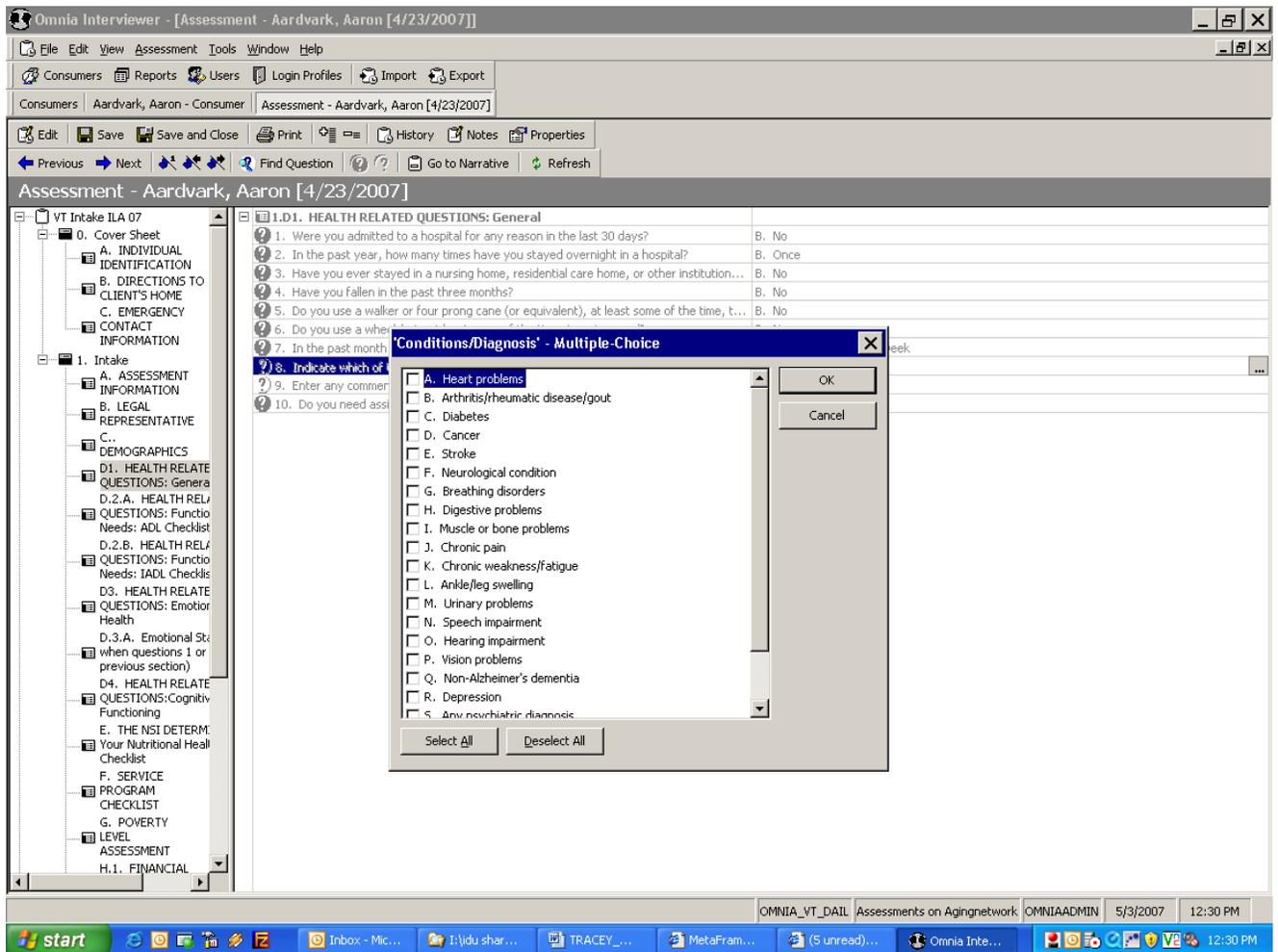
Question	Answer
0. ILA is being completed for which program?	E. Medicaid Waiver (Choices for Care)
1. Date of assessment?	04/23/2007
2. Unique ID# for client.	102443222
3.a. Client's last name?	Aardvark
3.b. Client's first name?	Aaron
3.c. Client's middle initial?	
4. Client's telephone number.	802-878-8514
5. Client's Social Security Number?	444-33-3222
6. Client's date of birth?	01/02/1944
calculated age at assessment	63.3045859000684
7. Client's gender?	M. Male
8.a. Client's mailing street address or Post Office box.	
8.b. Client's mailing city or town.	M. Male
8.c. Client's mailing state.	F. Female
8.d. Client's mailing ZIP code.	T. Transgendered
9.a. Client's residential street address or Post Office box.	13 deadend lane
9.b. Client's residential city or town.	Essex
9.c. Client's state of residence.	VT

The status bar at the bottom of the window shows "OMNIA_VT_DAIL Assessments on Agingnetwork OMNIAADMIN 5/3/2007 12:29 PM". The Windows taskbar at the bottom shows the Start button and several open applications, including "Inbox - Mic...", "I:\jdu shar...", "TRACEY...", "MetaFram...", "(5 unread)...", and "Omnia Inte...". The system clock shows "12:28 PM".

Entering Multiple Choice Question Answers

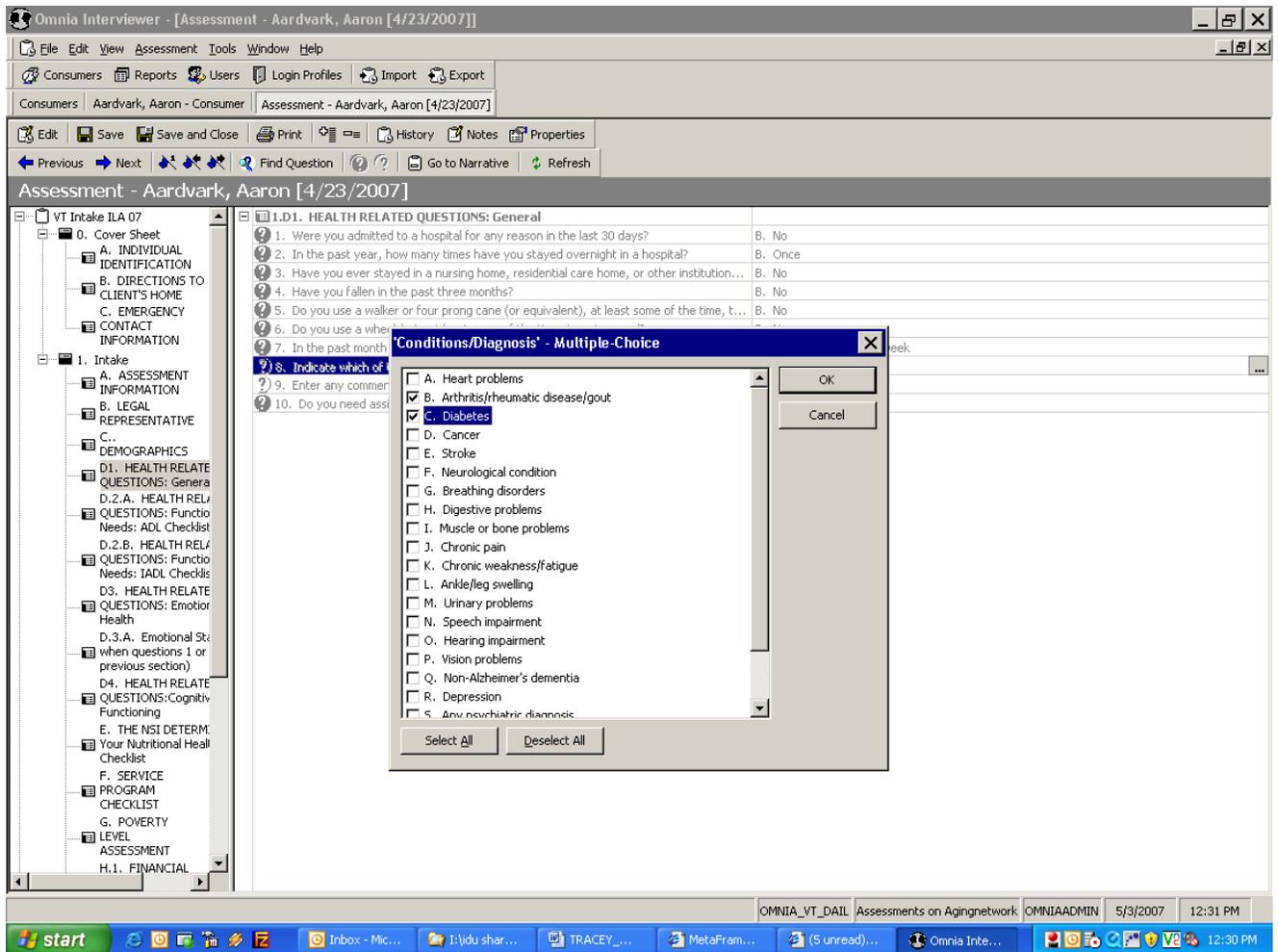
Multiple choice answers will have “...” in a box at the end of the highlighted question line. When you click this box, or simply press the space bar, the choice list will appear. See below for an example.



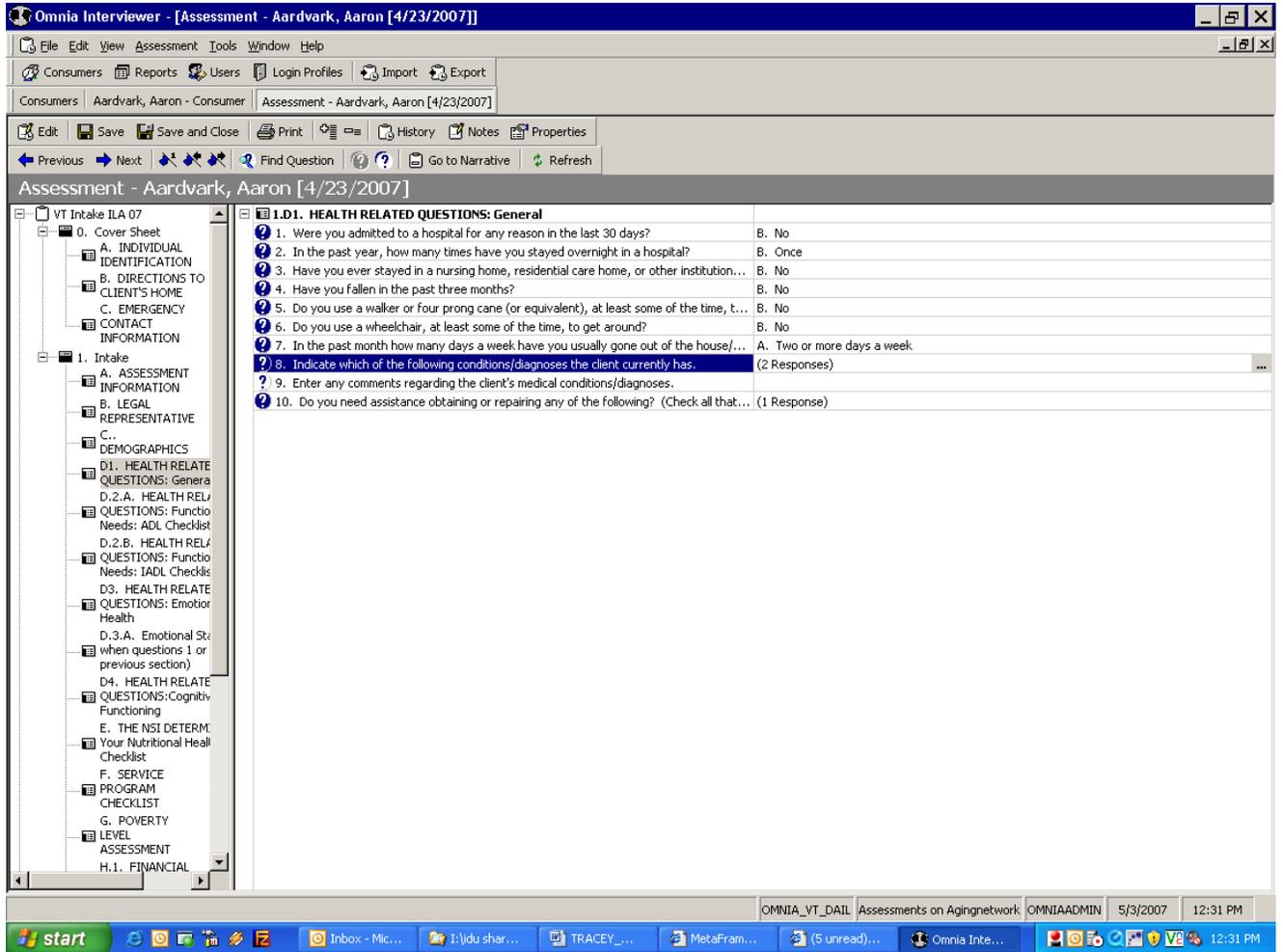


To enter a choice, use the down (or up) arrow key to move to the choice you want and hit the space bar to check the choice. You can also use your mouse and check off the desired choices.

Choose as many choices as you want and click OK when finished. See below:

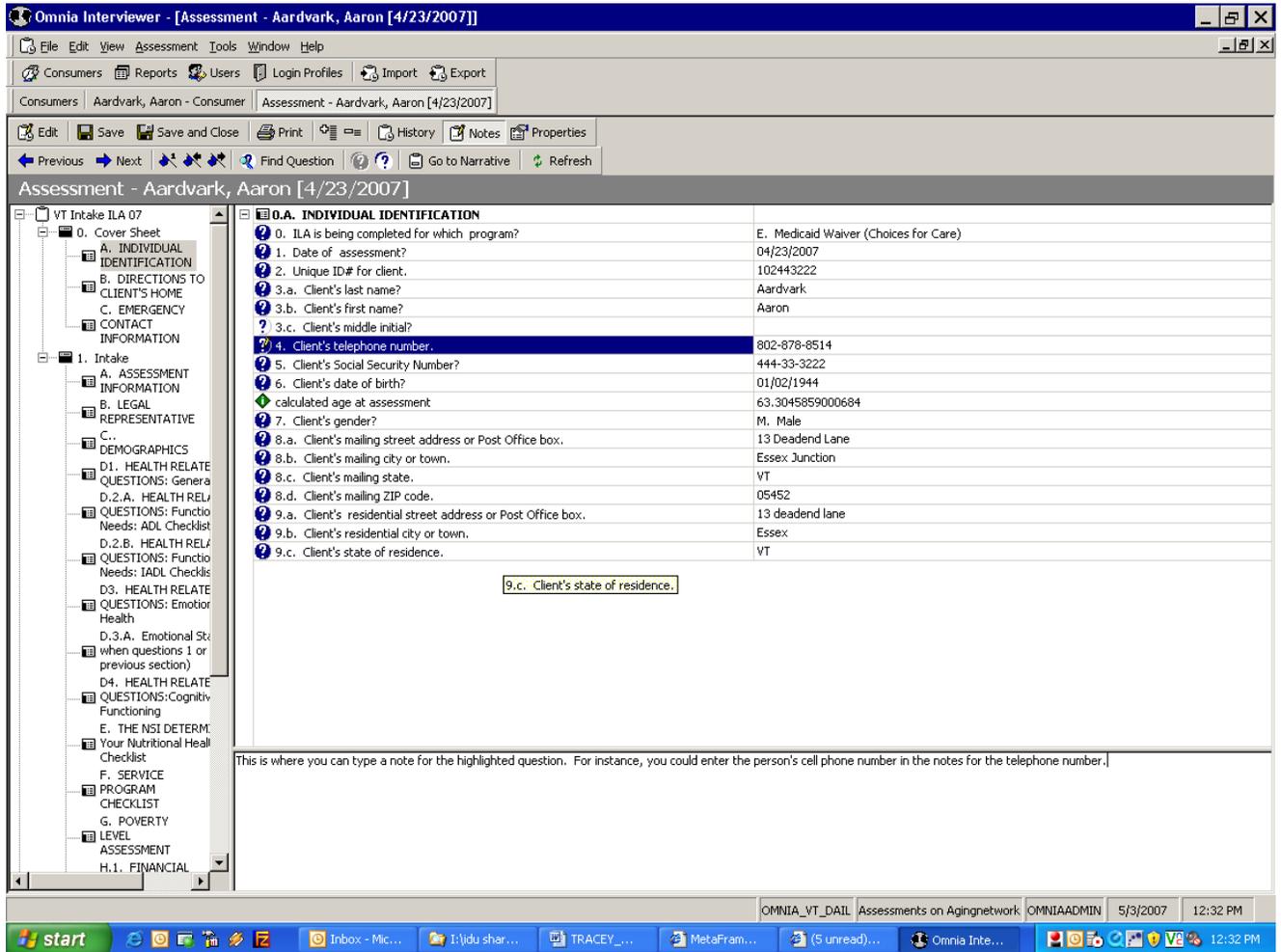


After making your choices and hitting OK, the choices are saved and you will see the number of responses you chose for that question. See below:



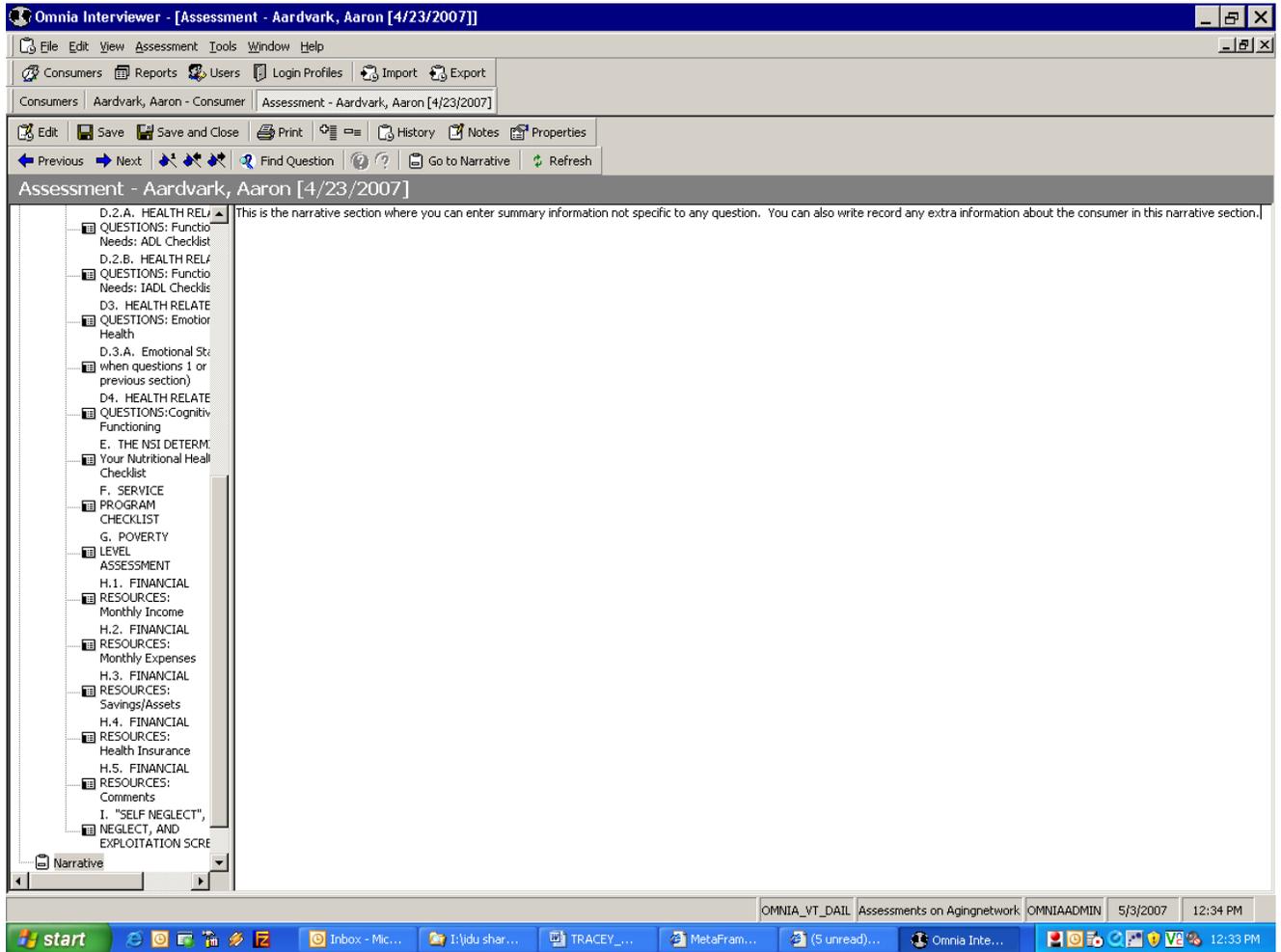
Using Notes

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:



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:

The screenshot displays the Omnia Interviewer application window. The title bar reads "Omnia Interviewer - [Assessment - Aardvark, Aaron [4/23/2007]]". The menu bar includes File, Edit, View, Assessment, Tools, Window, and Help. Below the menu bar is a toolbar with icons for File, Reports, Users, Login Profiles, Import, and Export. The main window area is divided into a left-hand navigation pane and a right-hand data entry area.

The left-hand navigation pane shows a tree view of the assessment structure:

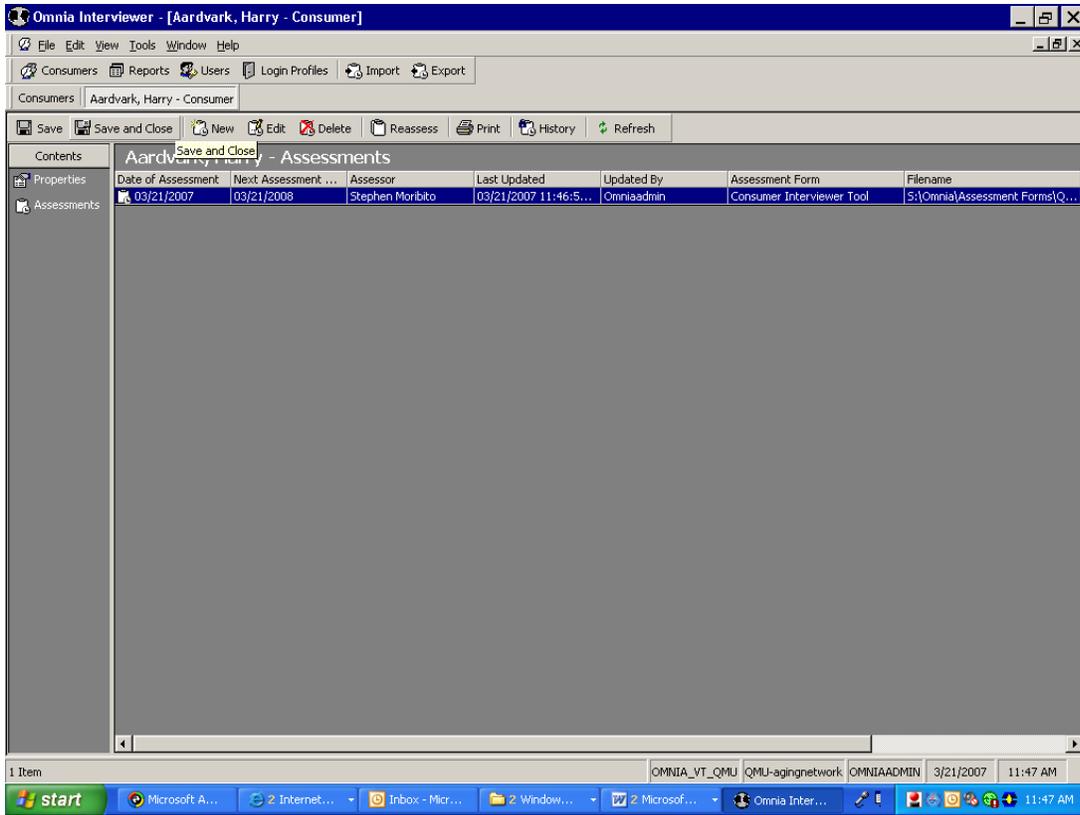
- VT Intake ILA 07
 - 0. Cover Sheet
 - A. INDIVIDUAL IDENTIFICATION
 - B. DIRECTIONS TO CLIENT'S HOME
 - C. EMERGENCY CONTACT INFORMATION
 - 1. Intake
 - A. ASSESSMENT INFORMATION
 - B. LEGAL REPRESENTATIVE
 - C. DEMOGRAPHICS
 - D1. HEALTH RELATE QUESTIONS: Genera
 - D.2.A. HEALTH REL/ QUESTIONS: Functio Needs: ADL Checklist
 - D.2.B. HEALTH REL/ QUESTIONS: Functio Needs: IADL Checklis
 - D3. HEALTH RELATE QUESTIONS: Emotior Health
 - D.3.A. Emotional Sk... (when questions 1 or previous section)
 - D4. HEALTH RELATE QUESTIONS: Cognitiv Functioning
 - E. THE NSI DETERM. Your Nutritional Health Checklist
 - F. SERVICE PROGRAM CHECKLIST
 - G. POVERTY LEVEL ASSESSMENT
 - H.1. FINANCIAL

The right-hand data entry area is titled "0.A. INDIVIDUAL IDENTIFICATION" and contains the following fields:

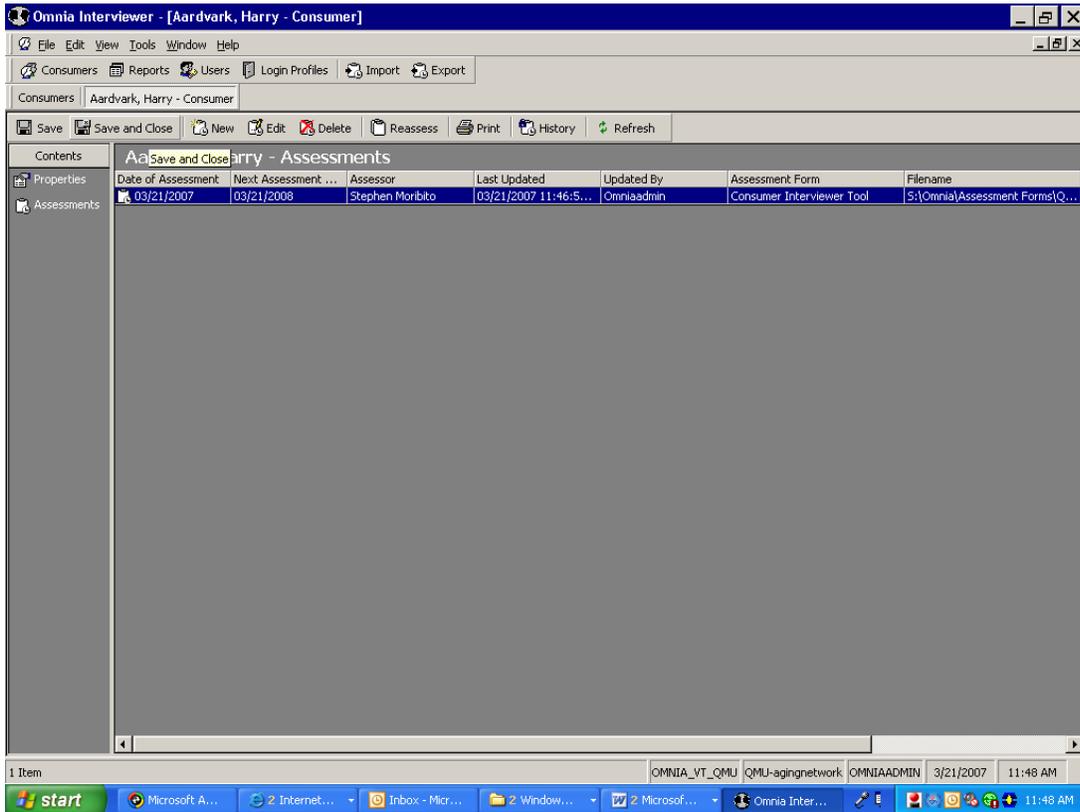
Question	Answer
0. ILA is being completed for which program?	E. Medicaid Waiver (Choices for Care)
1. Date of assessment?	04/23/2007
2. Unique ID# for client.	102443222
3.a. Client's last name?	Aardvark
3.b. Client's first name?	Aaron
3.c. Client's middle initial?	
4. Client's telephone number.	802-878-8514
5. Client's Social Security Number?	444-33-3222
6. Client's date of birth?	01/02/1944
calculated age at assessment	63.304585900684
7. Client's gender?	M. Male
8.a. Client's mailing street address or Post Office box.	13 Deadend Lane
8.b. Client's mailing city or town.	Essex Junction
8.c. Client's mailing state.	VT
8.d. Client's mailing ZIP code.	05452
9.a. Client's residential street address or Post Office box.	13 deadend lane
9.b. Client's residential city or town.	Essex
9.c. Client's state of residence.	VT

The status bar at the bottom of the window shows "OMNIA_VT_DAIL Assessments on Agingnetwork OMNIAADMIN 5/3/2007 12:34 PM". The Windows taskbar at the bottom shows the Start button and several open applications, including "Inbox - Mic...", "I:\jdu shar...", "TRACEY...", "MetaFram...", "(6 unread)...", and "Omnia Inte...".

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



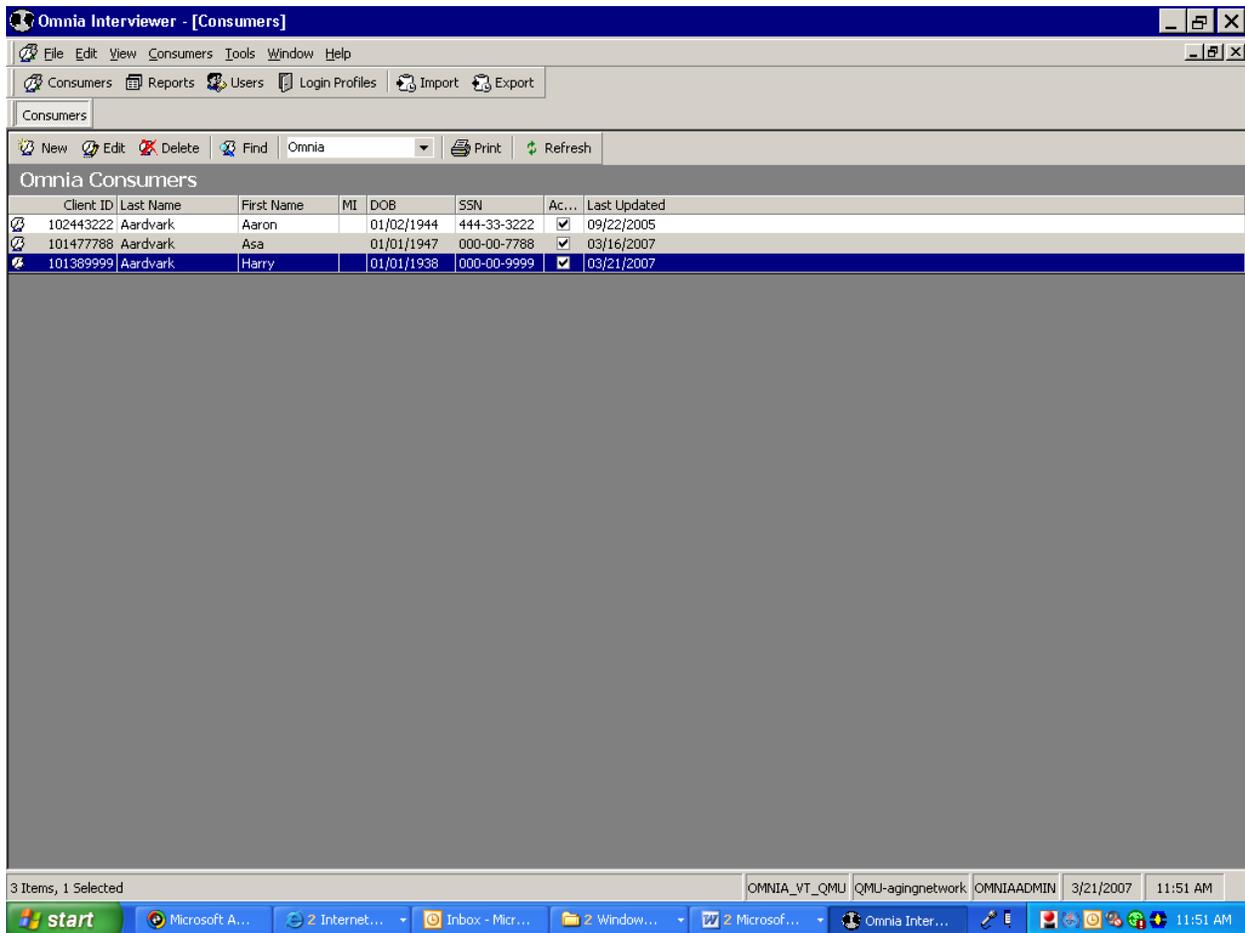
If you are finished with the assessment, you should save and close this screen also.



8. Logging Off

Logging Off Omnia Interviewer

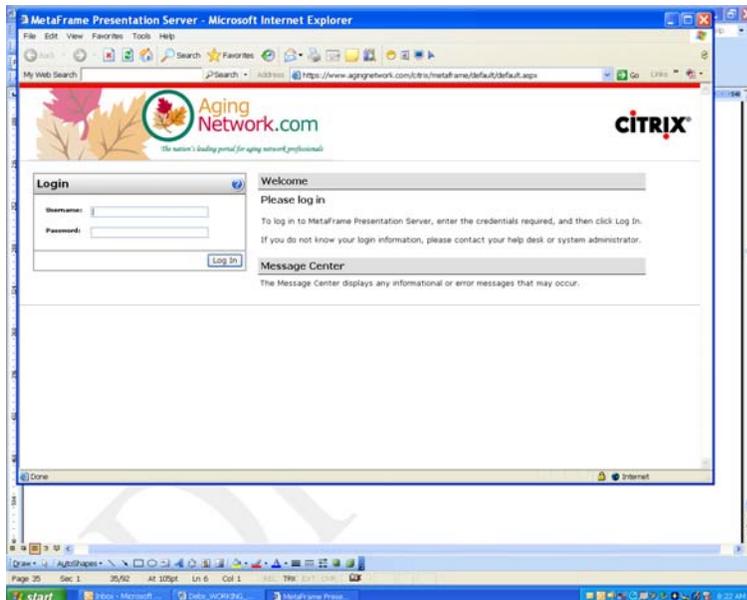
The process to log off OMNIA from either Agingnetwork or your laptop is the same. After saving the consumer you will see this screen. You can log off and exit the program by clicking on the “X” in the top right hand corner.



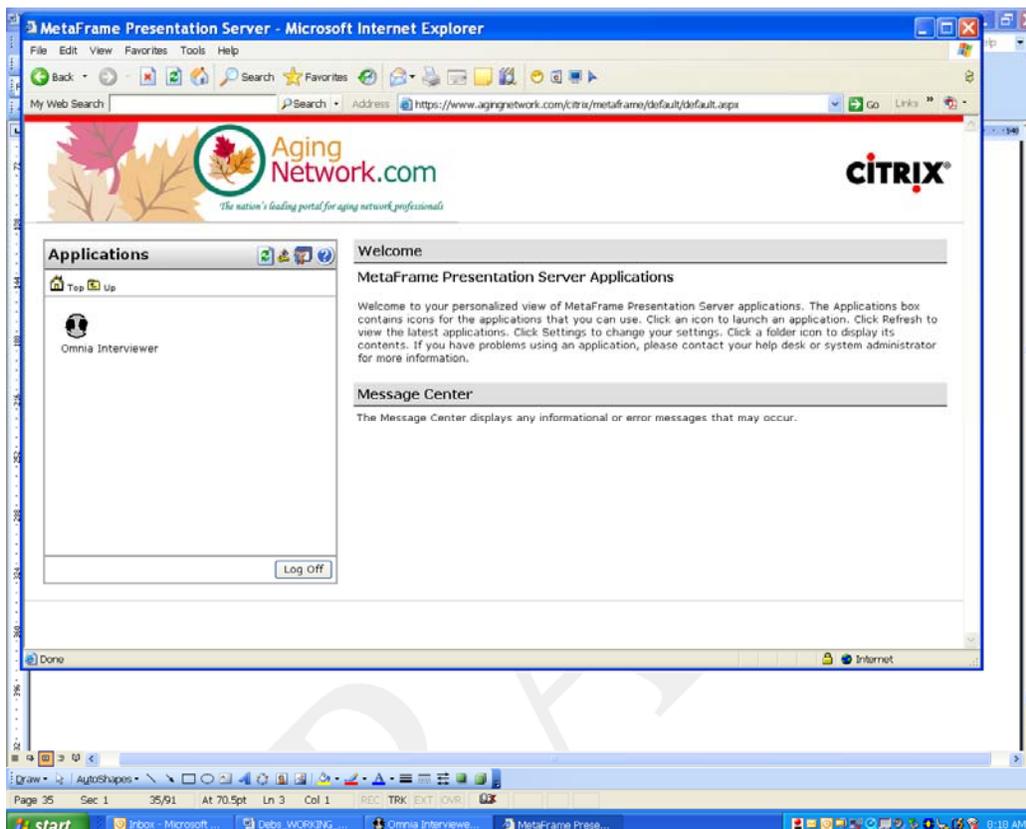
After click the “X”, a prompt screen will appear asking if you are certain you wish to exit. Press Yes to exit the application.

Logging off Agingnetwork.com

Since Agingnetwork.com is a web site, you don't technically have to log out. The system will automatically close your session and return you to the main login screen after a set time of inactivity.



However, if you still see the MetaFrame Presentation window showing the Omnia Icon (as shown below), you are still logged into Agingnetwork.com and your session has not timed out. If this is the case, you should click the "Log Off" button to log off the server.

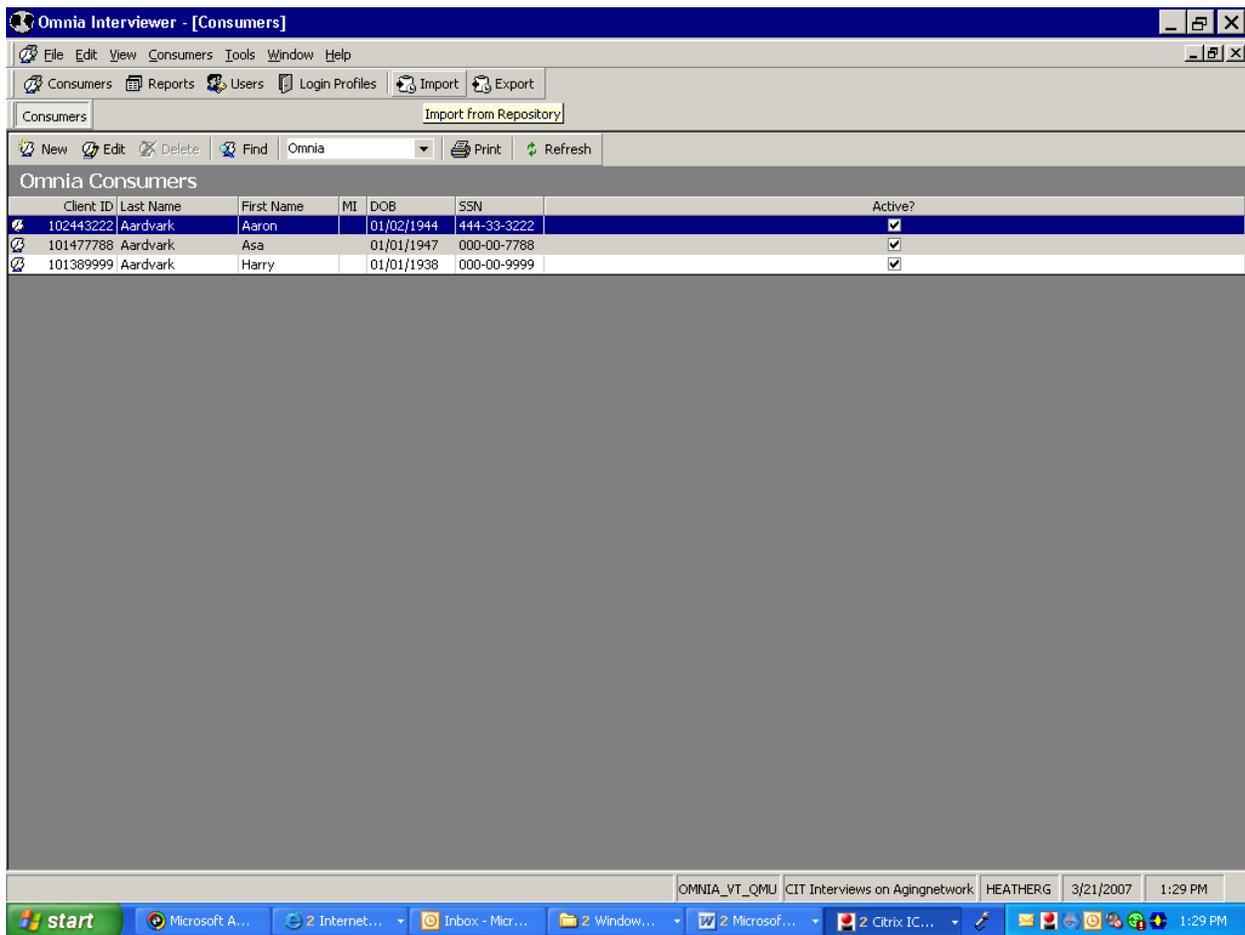


9. Importing Consumers (Assessments) From Laptop to Agingnetwork.com

Exporting and importing should only occur when your laptop is logged into Agingnetwork.com. Importing will take consumers and assessments from Omnia on the laptop and move them into the main database on Agingnetwork. When you login to Agingnetwork.com, your login profile should always be "Assessments on Agingnetwork". When you are importing you will always import from the login profile "Assessments on Laptop".

Log into Agingnetwork.com and open OMNIA Interviewer.

From the consumer listing screen, click on the Import button to begin importing.

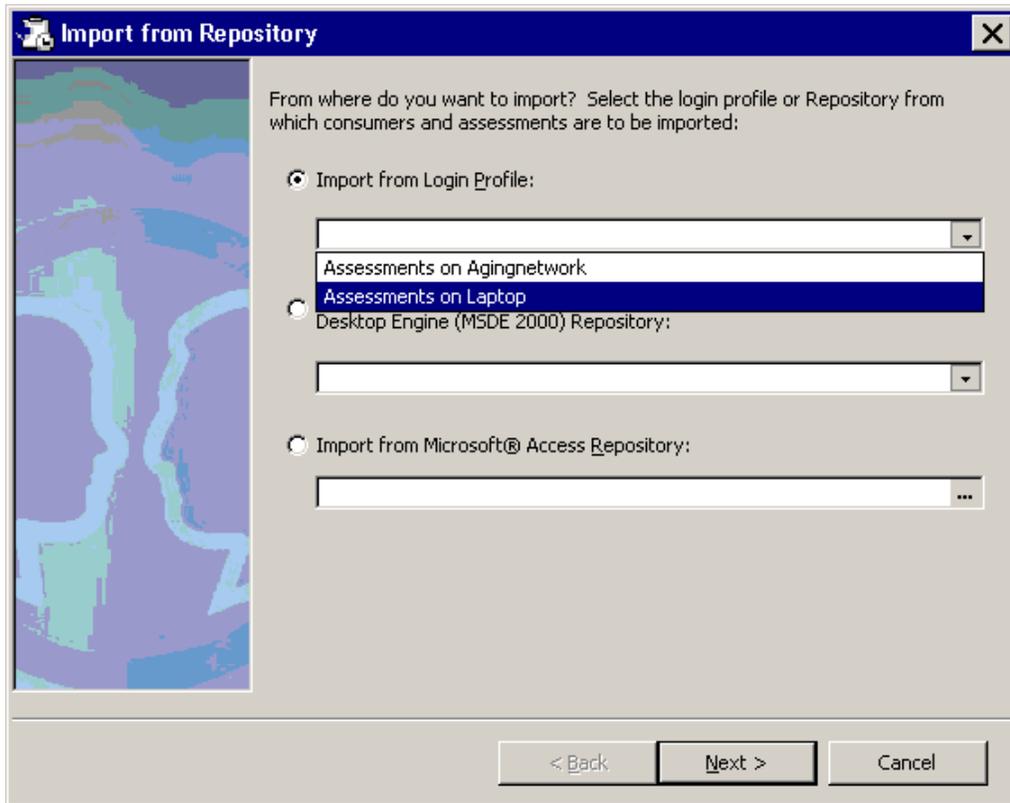


The screenshot displays the 'Omnia Interviewer - [Consumers]' application window. The window title bar includes standard minimize, maximize, and close buttons. The menu bar contains 'File', 'Edit', 'View', 'Consumers', 'Tools', 'Window', and 'Help'. The main menu includes 'Consumers', 'Reports', 'Users', 'Login Profiles', 'Import', and 'Export'. Below the menu is a toolbar with 'New', 'Edit', 'Delete', 'Find', 'Omnia', 'Print', and 'Refresh'. The main content area is titled 'Omnia Consumers' and contains a table with the following data:

Client ID	Last Name	First Name	MI	DOB	SSN	Active?
102443222	Aardvark	Aaron		01/02/1944	444-33-3222	<input checked="" type="checkbox"/>
101477788	Aardvark	Asa		01/01/1947	000-00-7788	<input checked="" type="checkbox"/>
101389999	Aardvark	Harry		01/01/1938	000-00-9999	<input checked="" type="checkbox"/>

The taskbar at the bottom shows the Windows Start button, several open applications (Microsoft A..., Internet..., Inbox - Mic..., 2 Window..., 2 Microsof..., Citrix IC...), and the system tray with the date (3/21/2007) and time (1:29 PM).

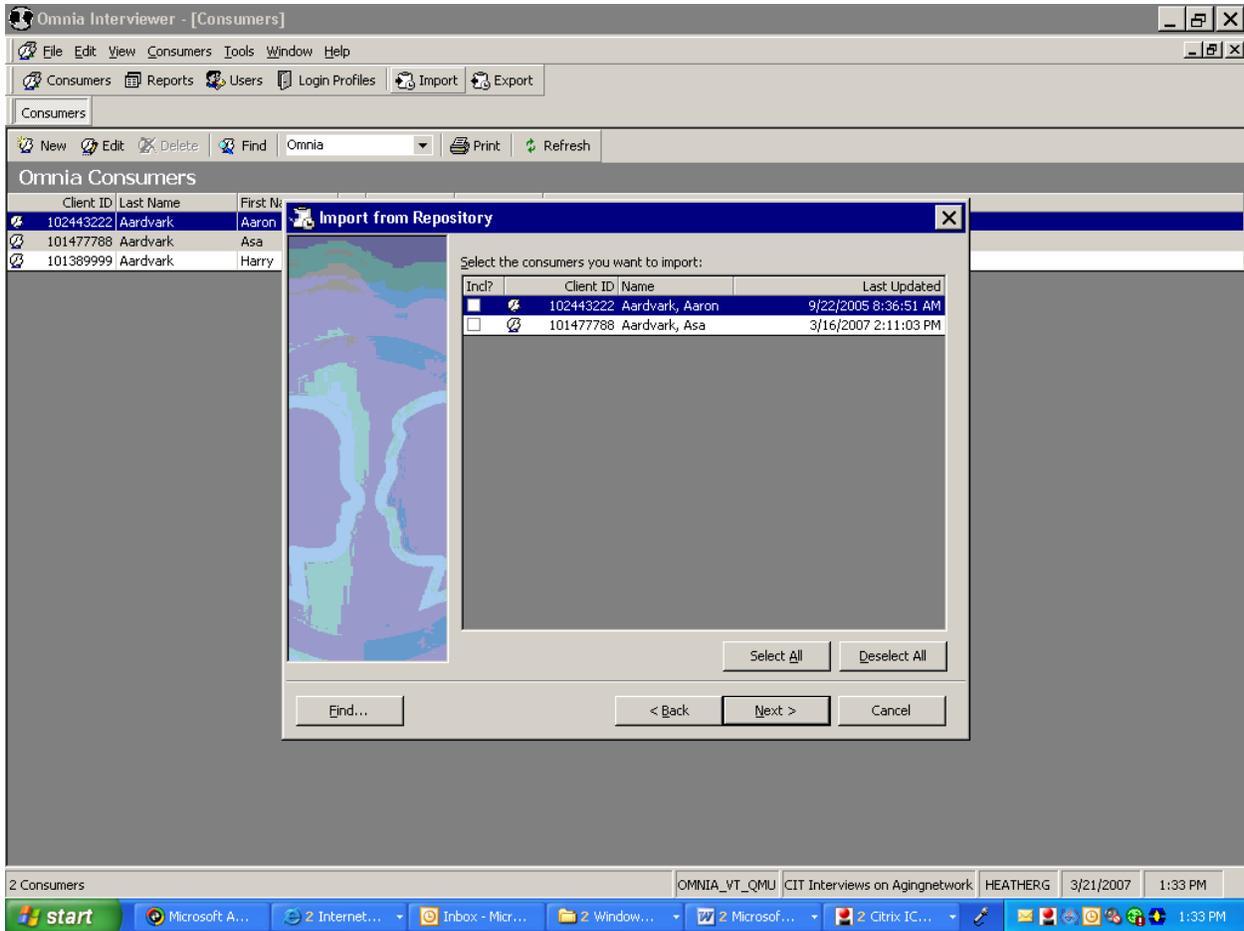
After clicking on Import you will see the screen below.



You should click on the arrow box in the “Import From Login Profile” option. There are two choices here: 1. “Assessments on Agingnetwork” and 2. “Assessments on Laptop. You will always import from “Assessments on Laptop”.

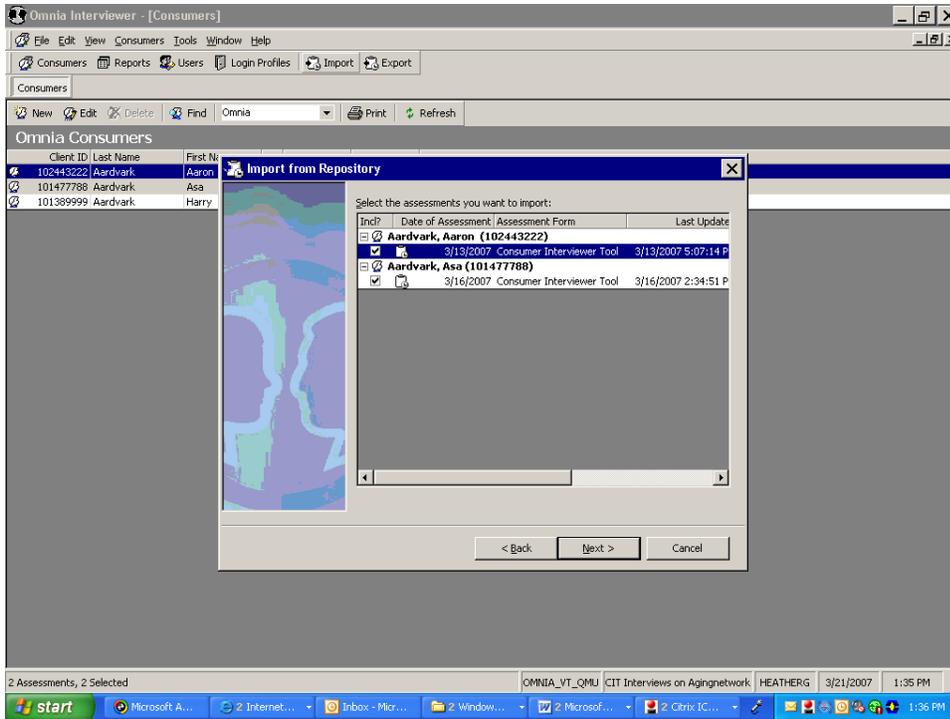
After clicking on the Import From Login Profile choice of “Assessments on Laptop”, click Next.

After clicking Next you will see the screen below:

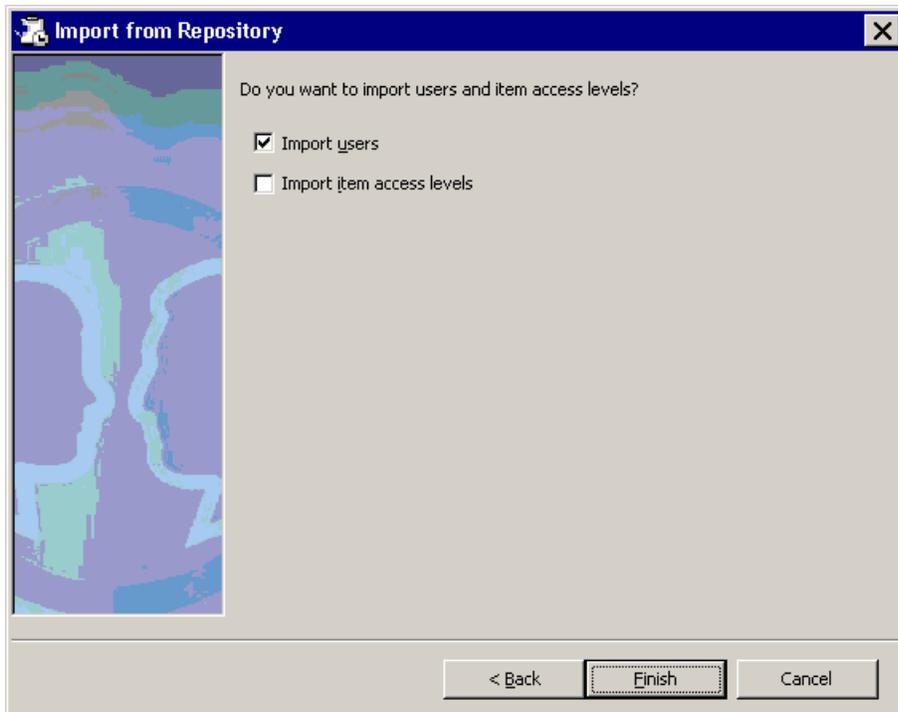


This screen allows you to choose which consumers you want to import. If you want to import all you can click Select All. If you want to import only some of the consumers, you must click in the box by the consumer's name. Then click Next.

After selecting consumers to import and clicking Next you will see the screen below:

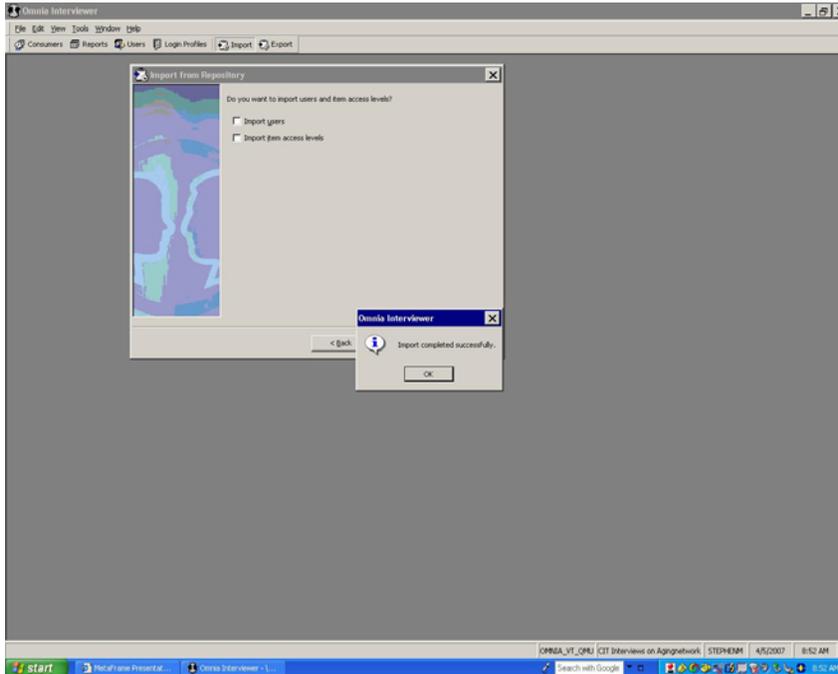


This screen allows you to choose which assessments you want to import. Make sure all are selected and click Next. The screen below will then appear.. Check Import Users and make sure “Import item access levels” is not checked.

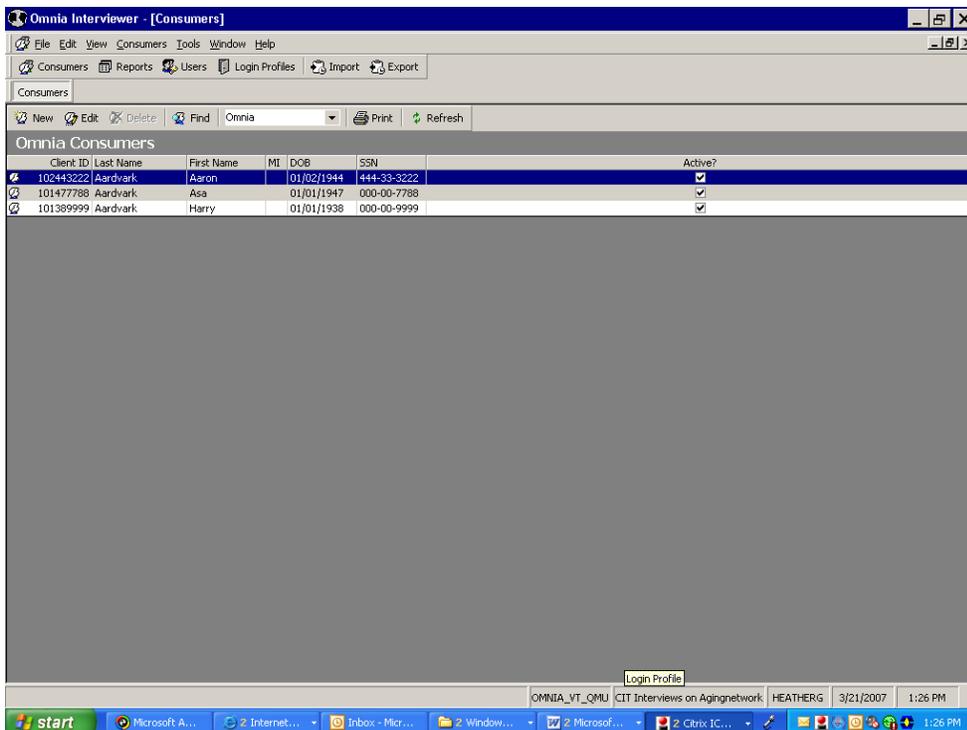


Click Finish and the import process will begin. The data will be saved to Agingnetwork.com.

After clicking Finish you should see the screen below. Click OK in the “Import Completed successfully” box.



After clicking OK you will return to the Consumer Listing screen.



If you are finished, you can exit by clicking on the large “X” in the top right corner.

10. Printing Assessments

After finding a consumer and opening an assessment, you can print that assessment as long as you are connected to a printer. If the assessment has not yet been imported in Agingnetwork, you will not be able to print it from Agingnetwork. However, if the assessment has been imported, it can be printed from either Agingnetwork or Omnia on the laptop. Keep in mind that the assessment on Agingnetwork should always be considered the official record.

Open the assessment you wish to print and click on the Print button.

The screenshot shows the Omnia Interviewer application window. The title bar reads "Omnia Interviewer - [Assessment - Aardvark, Aaron [4/23/2007]]". The menu bar includes File, Edit, View, Assessment, Tools, Window, and Help. The toolbar contains buttons for Consumers, Reports, Users, Login Profiles, Import, and Export. Below the toolbar, there are buttons for Edit, Save, Save and Close, Print, History, Notes, and Properties. The main window displays a tree view on the left with the following structure:

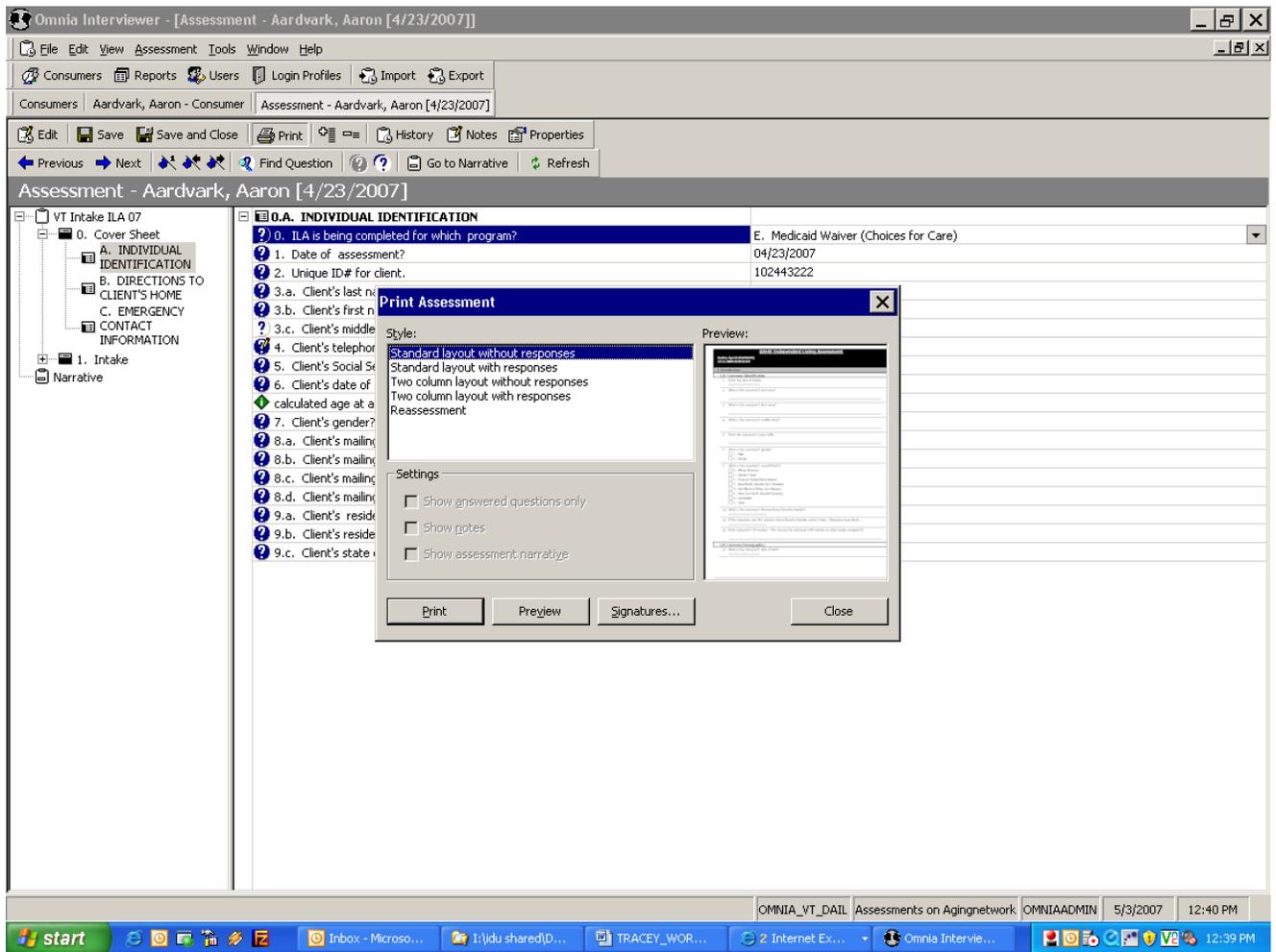
- VT Intake ILA 07
 - 0. Cover Sheet
 - A. INDIVIDUAL IDENTIFICATION
 - B. DIRECTIONS TO CLIENT'S HOME
 - C. EMERGENCY CONTACT INFORMATION
 - 1. Intake
 - Narrative

The right pane shows the "0.A. INDIVIDUAL IDENTIFICATION" section with the following questions and answers:

Question	Answer
0. ILA is being completed for which program?	E. Medicaid Waiver (Choices for Care)
1. Date of assessment?	04/23/2007
2. Unique ID# for client.	102443222
3.a. Client's last name?	Aardvark
3.b. Client's first name?	Aaron
3.c. Client's middle initial?	
4. Client's telephone number.	802-878-8514
5. Client's Social Security Number?	444-33-3222
6. Client's date of birth?	01/02/1944
calculated age at assessment	63.3045859000684
7. Client's gender?	M. Male
8.a. Client's mailing street address or Post Office box.	13 Deadend Lane
8.b. Client's mailing city or town.	Essex Junction
8.c. Client's mailing state.	VT
8.d. Client's mailing ZIP code.	05452
9.a. Client's residential street address or Post Office box.	13 deadend lane
9.b. Client's residential city or town.	Essex
9.c. Client's state of residence.	VT

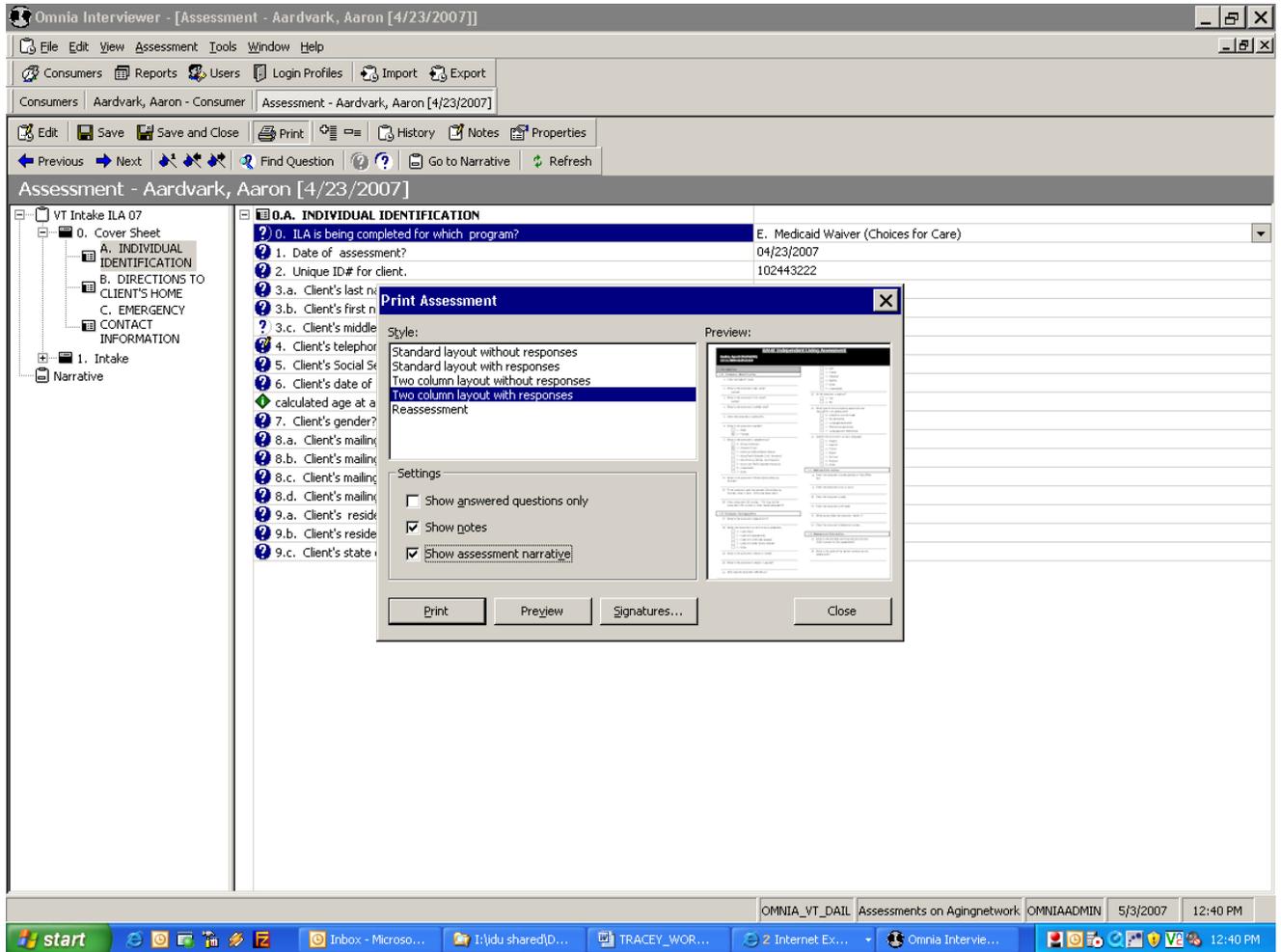
The Windows taskbar at the bottom shows the Start button, several open applications (Inbox - Microso..., I:\idu shared\D..., TRACEY_WOR..., Internet Ex..., Omnia Intervie...), and the system tray with the date 5/3/2007 and time 12:39 PM.

After clicking on the Print button, you will be able to choose the layout and content of the printed assessment..



You must first select a style. If you want to print an answered assessment, choose “Two column layout with responses”. Do this by highlighting that line.

After clicking on “Two column layout with responses”, the “Settings” section becomes active. Choose whether you would like to print notes and/or narrative. See the example below.



Click on the choices you want to print. If you leave the choices blank, any notes or narrative that were entered in the assessment will not print.

After the notes and narrative have been selected, click "Preview". You will see the screen below.

VT Intake ILA 07
Aardvark, Aaron (102443222)
4/23/2007

0. Cover Sheet

0.A. INDIVIDUAL IDENTIFICATION

0. ILA is being completed for which program?

- A - Adult day
- B - ASP
- C - HAASS
- D - Homemaker
- E - Medicaid Waiver (Choices for Care)
- F - AAA Services (NAPIS)
- G - Other
- H - Dementia respite

Notes:

1. Date of assessment?
4/23/2007

2. Unique ID# for client.
102443222

3.a. Client's last name?
Aardvark

3.b. Client's first name?
Aaron

3.c. Client's middle initial?

4. Client's telephone number.
802-878-8514

Notes: This is where you can type a note for the highlighted question. For instance, you could enter the person's cell phone number in the notes for the telephone number.

5. Client's Social Security Number?
444-33-3222

6. Client's date of birth?

13 deadend lane

9.b. Client's residential city or town.
Essex

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

0.B. DIRECTIONS TO CLIENT'S HOME

Directions to client's home.
take fork in the road

0.C. EMERGENCY CONTACT INFORMATION

1.a. Emergency Contact 1
aunt aardvark

1.b. What is the telephone number of the person who is listed as Emergency Contact # 1?
878-8888

1.c. Enter the address of person to contact in an emergency.
3

1.d. What is the emergency contact's city or town?
deadend lane

1.e. What is the emergency contact's state?
vt

1.f. What is the emergency contact's ZIP code?

1.g. Relationship to client
aunt

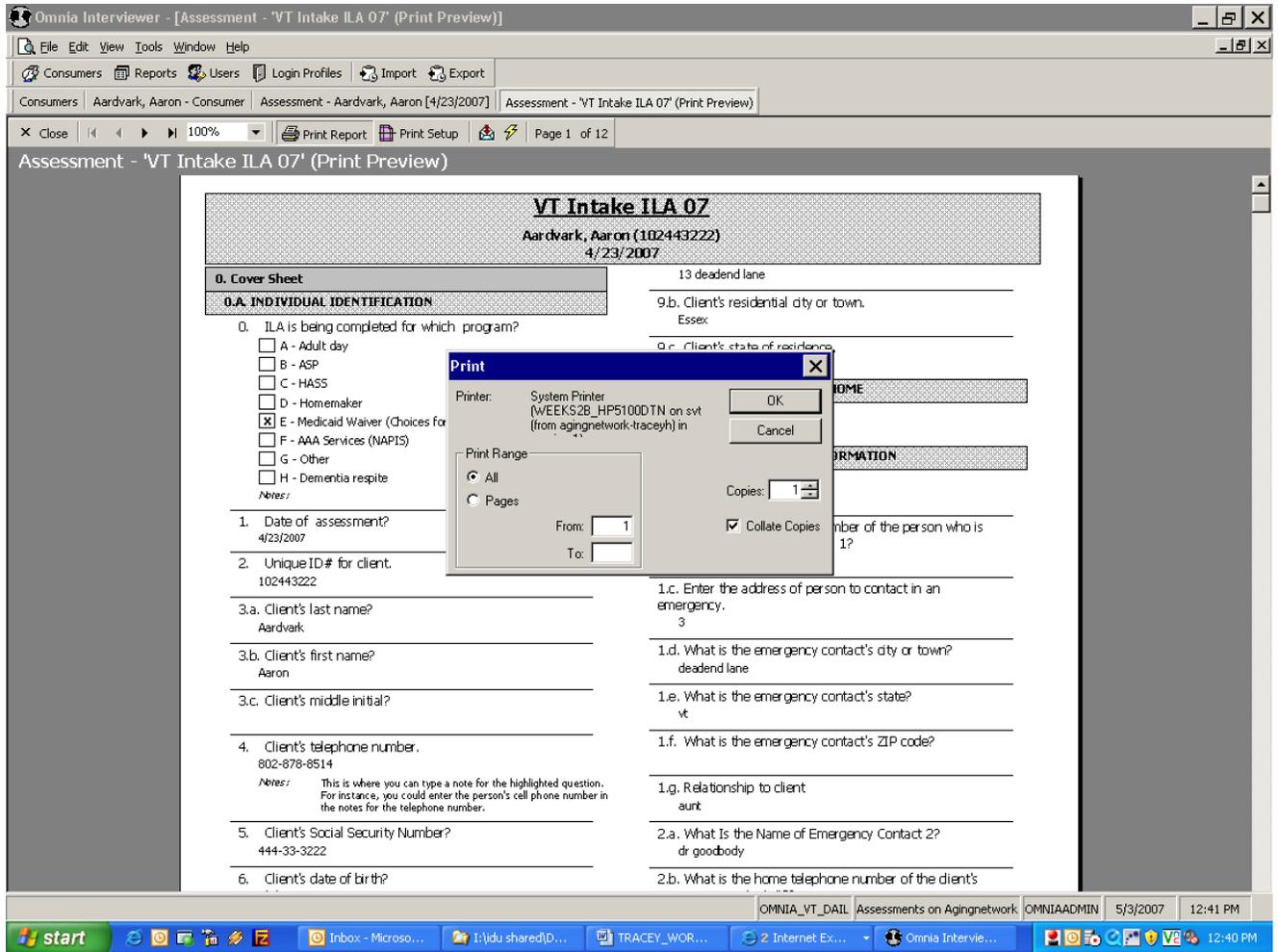
2.a. What is the Name of Emergency Contact 2?
dr goodbody

2.b. What is the home telephone number of the client's

This is what the printed version would look like. It is in PDF form and cannot be altered on this page. Review it to be sure it is what you want and, if you notice incorrect data or notes not showing, close the page and go back to correct either the data entry or the notes selection.

If you decide to print after reviewing the form, click the "Print Report" button.

After clicking "Print Report" you will see the screen below.



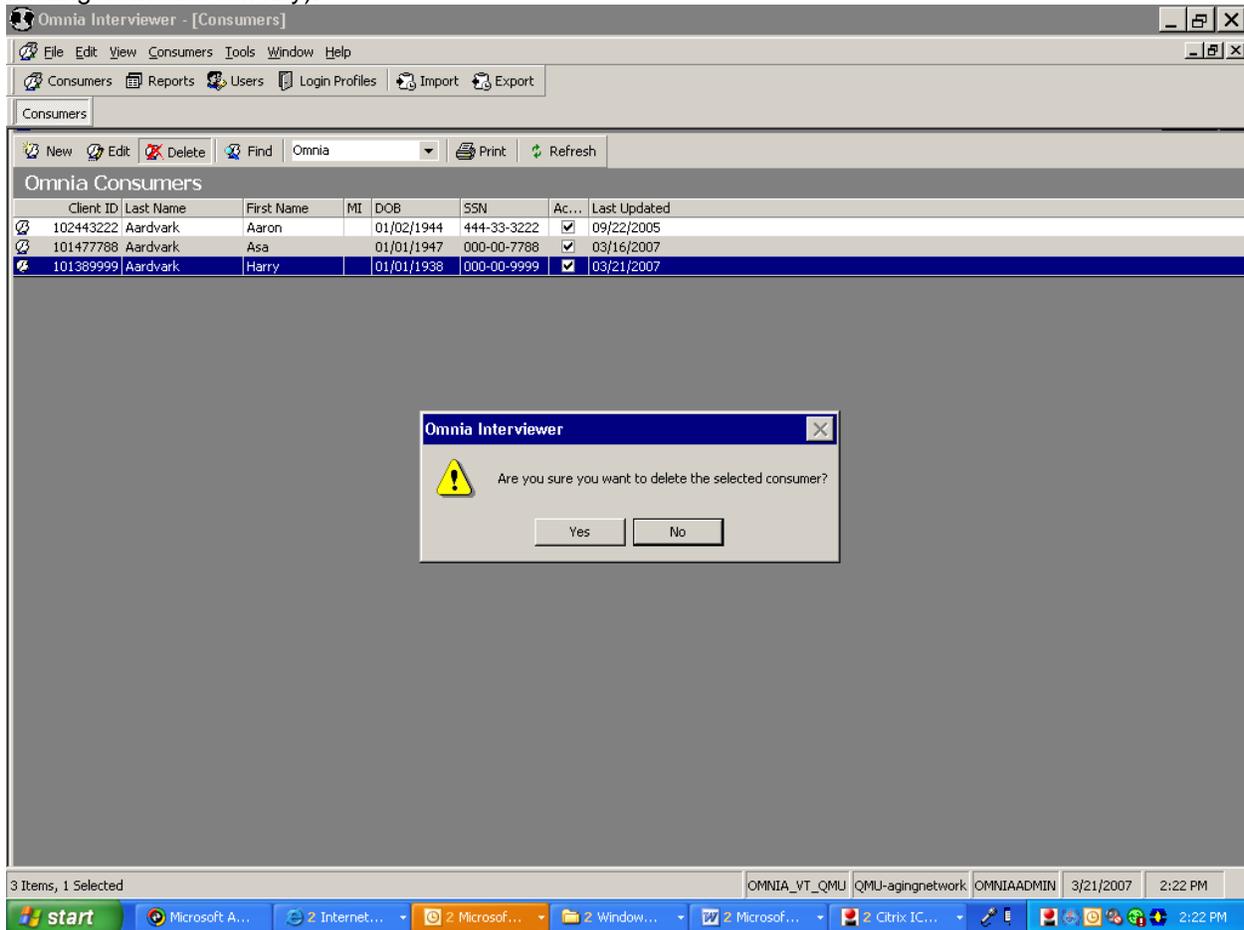
You can print all pages or a range of pages. If you want to print all pages, click OK here. If you want a range of pages, click on "Pages" and type in the page numbers you want, then click OK. After you click OK the form will print to your default printer.

After printing, you will return to the open assessment form. click Save and Close to exit the assessment.

11. Deleting Consumers From Laptop

After importing consumers from the laptop to Agingnetwork.com and verifying that the consumers and assessments are on Agingnetwork.com, you can delete the consumers from the laptop. If you ever need them on the laptop again you can re-export them to the laptop.

To delete, you must be on the consumer list screen. Highlight the consumers to be deleted and click on the delete button. To choose more than one consumer at a time, highlight the first consumer, hold down the Control "Ctrl" key on your keyboard, and choose the other consumers you wish to delete (while still holding down the Ctrl key).



Again, be sure the assessments have been imported to Agingnetwork.com before deleting. If you are sure, click Yes and the consumer(s) will be deleted. There is no way to 'undo' or retrieve a consumer deleted from your laptop so use this with caution. You will not be able to delete consumers from Agingnetwork.com. You can only delete consumers from the laptop.



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.