

# TRAINING MANUAL

## SAMS Information and Referral

### *Training Manual*

for VT V4A



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1.1	05/27/2015	Client review and updates
1.2	06/03/2015	Content updates by MW
1.3	06/03/2015	Minor edits and screenshot updates

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## Introduction to Training Guide

This Education Services Training Guide was designed to help SAMS I&R Users to develop foundational skills and how to effectively use SAMS I&R™ software.

The Guide is based upon SAMS I&R software as of April 2015. Updates to the application after this date, and any custom configurations for your organization may not be reflected in this manual.

This Training Guide contains detailed, step-by-step instructions on how to perform the tasks typically handled by SAMS I&R Users. After your training, you can come back to this material as needed for future reference.

During training, you are encouraged to ask any questions you may have. To develop skills learned in this training, you will need to access the system environment that has been configured for Test or Training use, and practice performing tasks using this Guide for reference. The SAMS I&R Administrators can assist you in obtaining access to a training or test site as appropriate.

We welcome your feedback about your SAMS I&R training experience and this manual supporting your product education. Please don't hesitate to let us know where we can make improvements.

Your confidence in using SAMS I&R for your assigned tasks will increase as you develop proficiency in the software. Take advantage of this training time, and continue to practice on your own in preparation for "going live" with SAMS I&R. Soon, you won't know how you ever did without SAMS I&R in performing your day-to-day activities.

Welcome to the Community of SAMS I&R users!

## About the Training Manual

### Symbols

The following symbols are used in this document:



#### TIP

**Tips** provide general recommendations on how to make it easier or help you to be more productive in using SAMS I&R.



#### CAUTION

**Cautions** highlight areas of note where special attention to detail may be important to your success with SAMS I&R.



#### NOTE

**Notes** provide additional information of general interest about a specific function or process of the SAMS I&R application.



#### Exercise

**Exercises** are provided to help you develop a better understanding of how SAMS I&R may be used in a “real life” situation with various training scenarios.

### Illustrations and Graphics

Screen shots provided in this manual may show a view or system configuration that is slightly different from those in use at your organization.

### Scope of Documentation

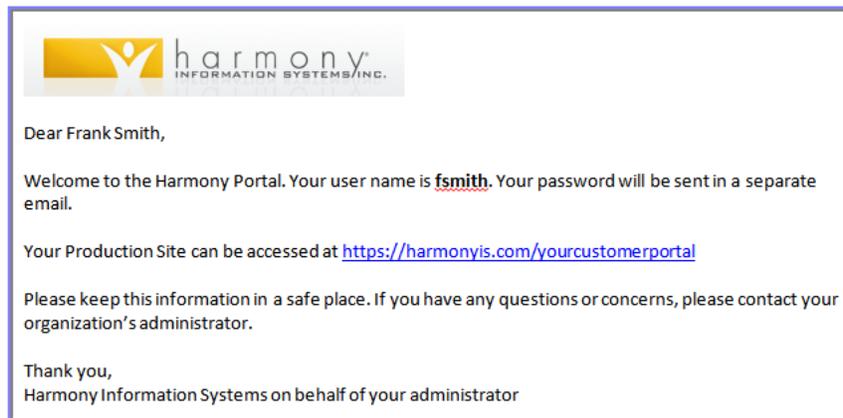
This training manual provides information about typical functions performed. It does not attempt to provide complete system information.

## Harmony Customer Portal

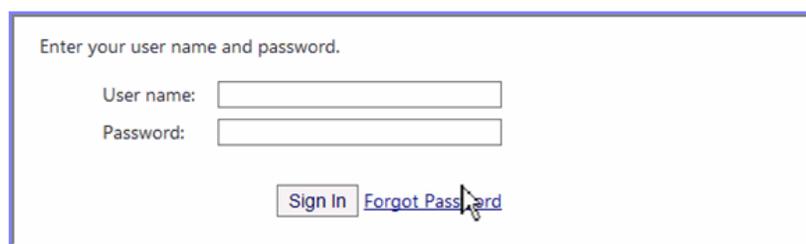
Through Harmony's powerful Customer Portal, users can easily access all of their Harmony applications, download documentation, and manage their user account, read important Harmony and Customer news, and more. The Harmony Customer Portal is an easy-to-use web site available 24 hours a day, 7 days a week, providing streamlined access to all things relevant to your Harmony experience.

### Accessing the Customer Portal for the First Time

Your organization's administrator is responsible for creating user accounts and granting access to the Customer Portal. Once your account has been set up and configured to the satisfaction of your administrator, automated email alerts will be sent to you, providing you with your User Name, Portal URL and Password. Your User Name and Password will be sent under separate emails for security purposes.



Once you enter the Customer Portal you'll be prompted to enter your assigned User Name and Password.



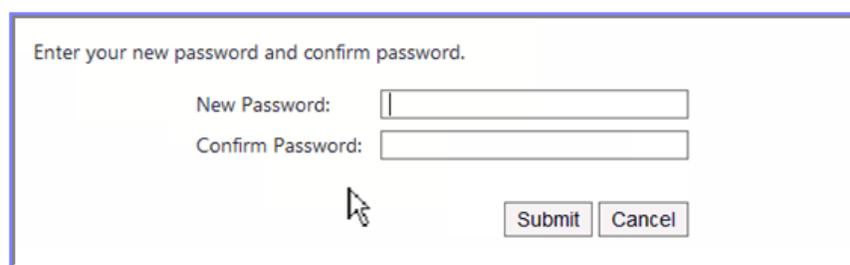
Enter your user name and password.

User name:

Password:

[Forgot Password](#)

The first time you log in with your User Name and Password, you'll be prompted to change your password from the default password assigned to you to a private password that only you know.



Enter your new password and confirm password.

New Password:

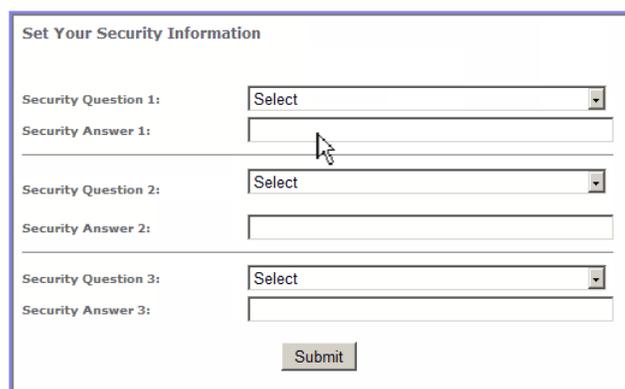
Confirm Password:



**Note:** Your password must be between 8-15 characters and must contain at least 1 capital letter (A, B, C...), at least one number (1, 2, 3...) and may *not* contain any special characters (. \* - ! # ...).

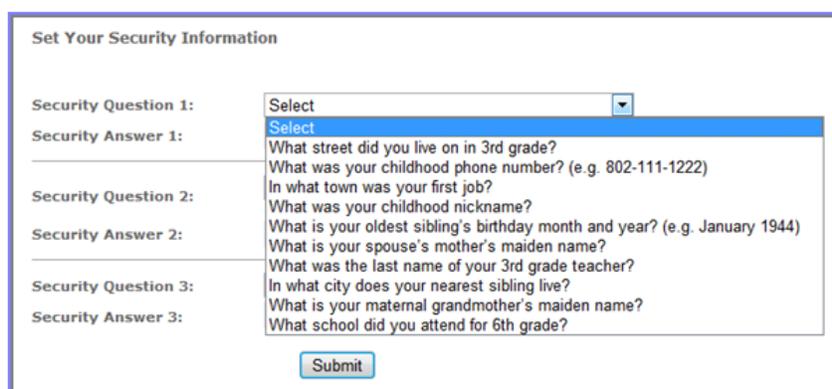
## Setting your Security Questions

After you have established your new password you will be prompted to save your Security Information, which is necessary in case you ever forget your User Name and Password. You will be presented a screen where you can record responses for up to 3 security questions. If you ever need to recover your User Name and Password in the future, the Harmony Customer Portal will prompt you with your security questions in order to validate your identity.



The screenshot shows a form titled "Set Your Security Information". It contains three rows, each with a "Security Question" dropdown menu (all set to "Select") and a corresponding "Security Answer" text input field. A "Submit" button is located at the bottom center of the form.

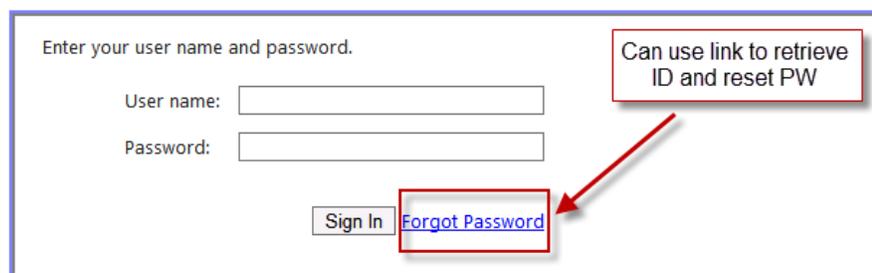
You must select at least one security question/answer, but may also enter data for all three if you would like.



The screenshot shows the same "Set Your Security Information" form, but with the "Security Question 1" dropdown menu open. The dropdown menu lists several options: "Select", "What street did you live on in 3rd grade?", "What was your childhood phone number? (e.g. 802-111-1222)", "In what town was your first job?", "What was your childhood nickname?", "What is your oldest sibling's birthday month and year? (e.g. January 1944)", "What is your spouse's mother's maiden name?", "What was the last name of your 3rd grade teacher?", "In what city does your nearest sibling live?", "What is your maternal grandmother's maiden name?", and "What school did you attend for 6th grade?". The "Submit" button is visible at the bottom.

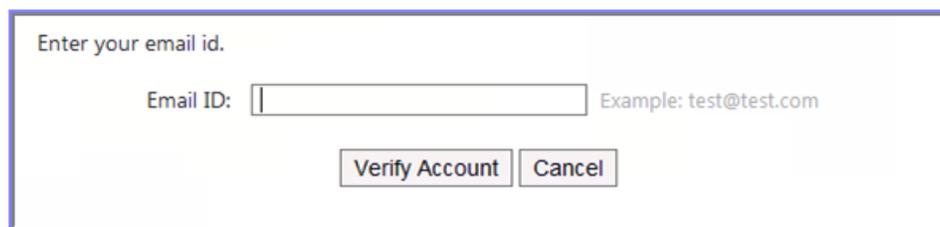
## Retrieving a Forgotten Password or User Name

Any time a user has forgotten their User Name or Password they can retrieve it automatically, without having to contact their administrator, simply by clicking on the **Forgot Password** link at the main login screen.



The screenshot shows a login form with the heading "Enter your user name and password." It includes fields for "User name:" and "Password:". Below these fields are a "Sign In" button and a "Forgot Password" link. A red box highlights the "Forgot Password" link, and a red arrow points from a text box above it that says "Can use link to retrieve ID and reset PW".

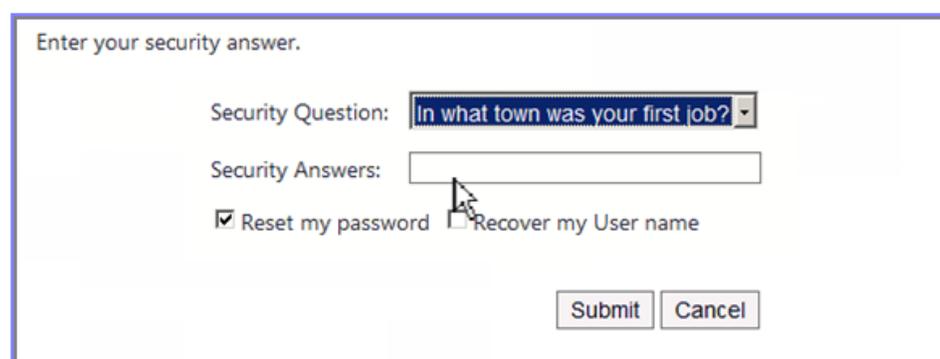
Once the **Forgot Password** link has been pressed, the user will be prompted to enter the Email address that is associated to the User Name.



Enter your email id.

Email ID:  Example: test@test.com

The user can enter their Email Address and press **Verify Account**. At this point the Customer Portal will confirm that the Email address is indeed associated to a valid account. If the validation is successful, the user will be presented with their security questions:



Enter your security answer.

Security Question:

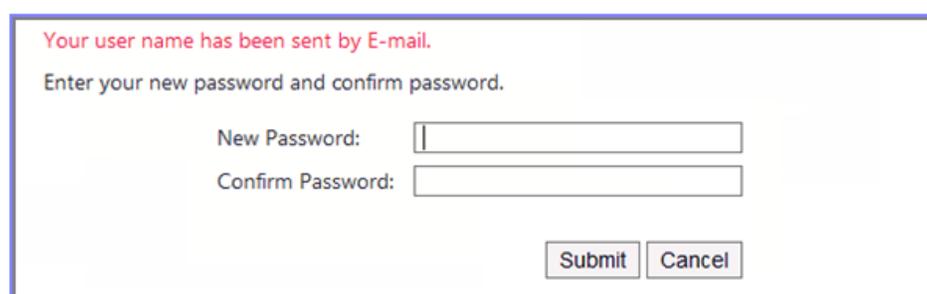
Security Answers:

Reset my password  Recover my User name

From this screen, the user needs to simply enter the response to their security question and choose among two options:

**Reset My Password:** Will immediately bring the user to the "Create New Password Screen".

**Recover my User Name:** Will send an automated Email to the user's Email address with the User Name information.



Your user name has been sent by E-mail.

Enter your new password and confirm password.

New Password:

Confirm Password:



**Note:** You may recover your User Name and reset your password at the same time. Even if you remember your password, you can update it whenever you would like. See the *Managing Your Configuration* section of this Companion Guide for more information.

## Harmony Customer Portal Main Screen

Once accurately logged in, the user will be brought to the main screen of the Harmony Customer Portal.



**Note:** Features in the Harmony Customer Portal are role-based, so the screen you see when you access the portal may differ from the screen shown in this example.

The main screen has read-only information across the top, including the name of the user currently logged in, as well as the name of the organization that the user is associated with. In addition, various panels across the sides provide access to different items, including:

**Application Links:** Allows for user to access any of your licensed Harmony applications. Single-clicking on an icon within the Application Links panel immediately launches the application.



**Note:** If your organization has turned on Single-Sign-On (SSO) you will be immediately logged into the application once you click on it. Users without SSO enabled will be prompted to log in with their application credentials.

**Customer Quick Links:** A series of URLs as created and defined by your organization's administrator. These links may provide access to state or county sites, or other sites relevant to your deployment. Clicking a Customer Quick Link will launch a new web page.

**Harmony Quick Links:** A series of URLs as created and defined by Harmony. These links will provide access to areas of interest to Harmony customers, such as access to the Administration on Aging (AoA) web site, HIPAA resources, and more. Clicking a Customer Quick Link will launch a new web page.

**Harmony News:** Important Harmony announcements, including information on new releases, upcoming trainings, products, conferences, and more!



**Note:** From time-to-time users may be alerted to important notifications (such as planned maintenance and scheduled application downtime) via a full-screen prompt upon logging into the portal. This will ensure that important messages do not go unnoticed. The user will have the option to click through the message after it has been read.

**Customer News:** A series of news articles as created and defined by your organization's administrator.

**Application Support Resources:** Provides access to application documentation (including User Guides and White Papers), application tutorials, Harmony's ticket submission tool, and more.

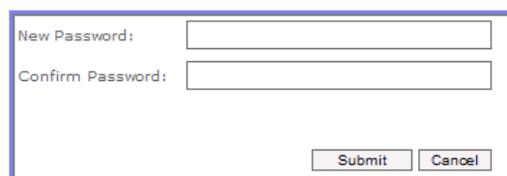
## Managing Your Configuration

At any time, users can modify their password and change their security info by pressing the **My Configuration** link in the Customer Portal.



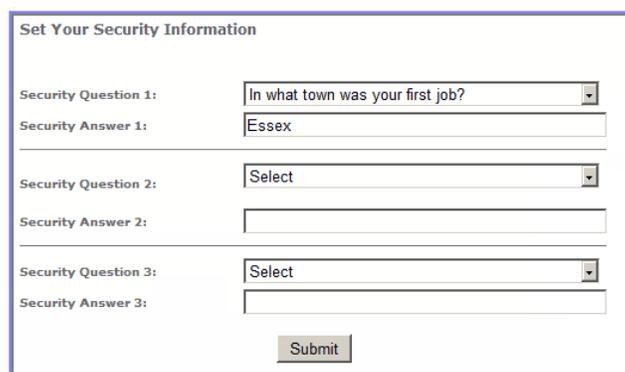
From here, the user can choose from two options:

**Change Password:** This feature gives logged in users the ability to change their password, as needed. Newly entered passwords are effective immediately.

A screenshot of a web form for changing a password. It contains two input fields: "New Password:" and "Confirm Password:". Below the fields are two buttons: "Submit" and "Cancel".

**Note:** For security purposes, passwords expire every 60 days. You will be prompted to change your password upon next login after expiration.

**Change Security Info:** Logged in users also have the ability to manage their security questions, adding or modifying entries as needed.



Set Your Security Information

Security Question 1:

Security Answer 1:

Security Question 2:

Security Answer 2:

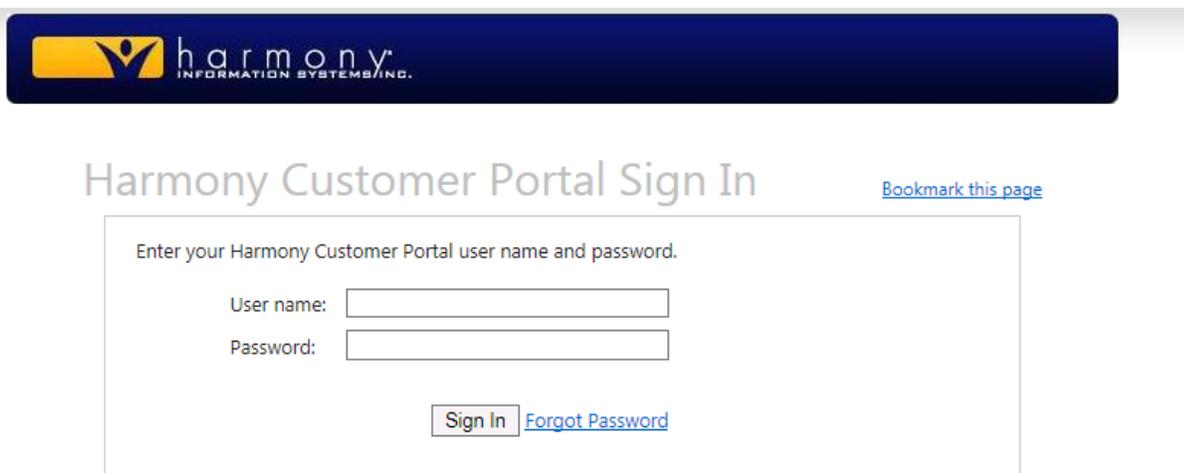
Security Question 3:

Security Answer 3:

**Signing Out:** It is highly recommended that users utilize the Sign Out link found under My Settings when they are no longer using the Harmony Customer Portal or any Harmony applications. Simply click Sign Out and upon prompting, the user will be logged out of the Customer Portal.

## Logging in to SAMS for the First Time

1. As instructed by your administrator, open Internet Explorer and navigate to the Portal login screen.
2. Enter your username and password at the login screen:



 harmony  
INFORMATION SYSTEMS, INC.

## Harmony Customer Portal Sign In

[Bookmark this page](#)

Enter your Harmony Customer Portal user name and password.

User name:

Password:

[Forgot Password](#)

3. If this is your first time logging in, you may be presented with the following dialog boxes. Click to accept.



4. Next you will be presented with an application login. Enter your SAMS I&R username and password here then click OK to launch SAMS I&R.



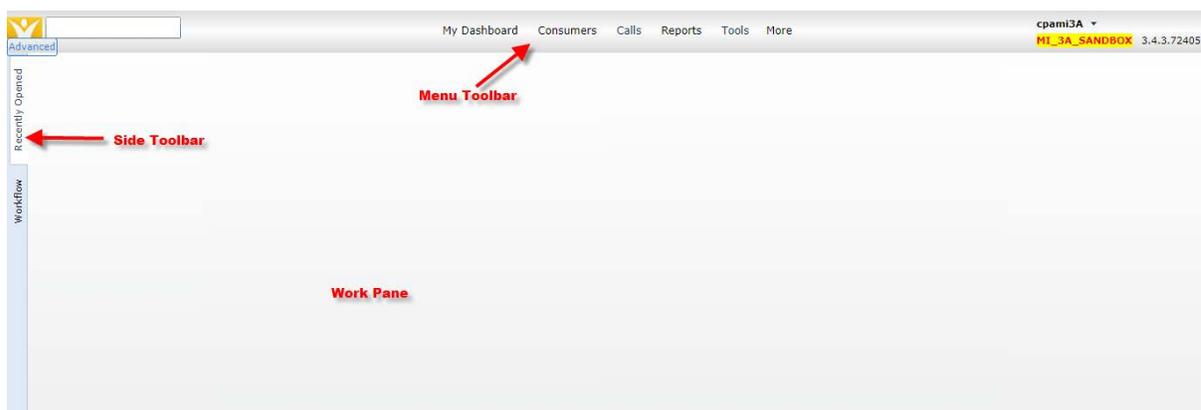
**Note:** If your organization has enabled single sign on, this screen will be bypassed.

5. Upon login you will be brought to the main screen of SAMS I&R. Continue on with the next section for instruction for navigating the software.

## Screen Layout and Navigation

The Main Screen in SAMS I&R has three distinct sections:

- The *Main Tool Bar* contains buttons that will open the various sections of the application. It also displays the logged in username and database, as well the Search field.
- The *Work Pane* displays the lists and screens that are found throughout the application, each of which contains its own toolbar.
- The *Sidebar Tabs* allow users to quickly move to recently opened screens, and follow through on any Workflows that have been generated.

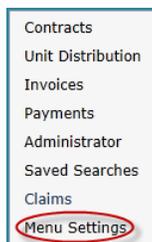


## Navigation in SAMS I&R

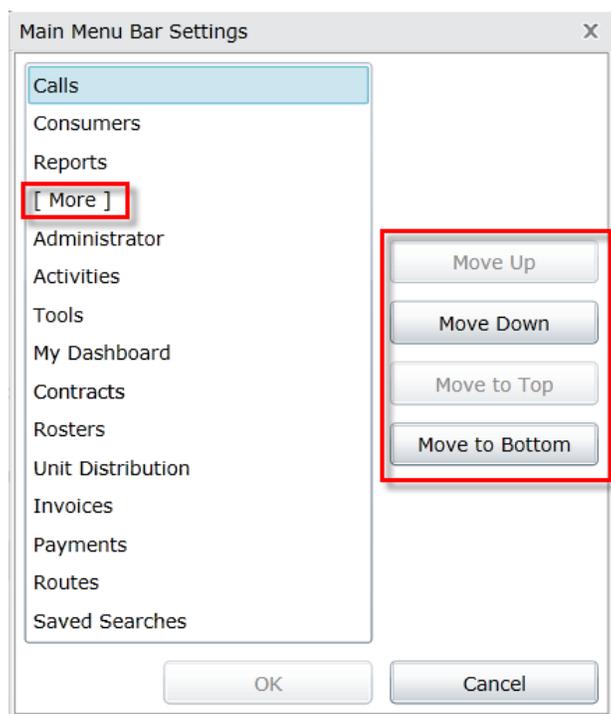
Accessing the different sections within SAMS I&R is done by clicking one of the buttons in the SAMS I&R *Toolbar*.



The *More* button reveals additional sections of the application that can be accessed.



To customize the Main Toolbar so that it shows the buttons that you use most frequently and conceal the others, click *Menu Settings*.

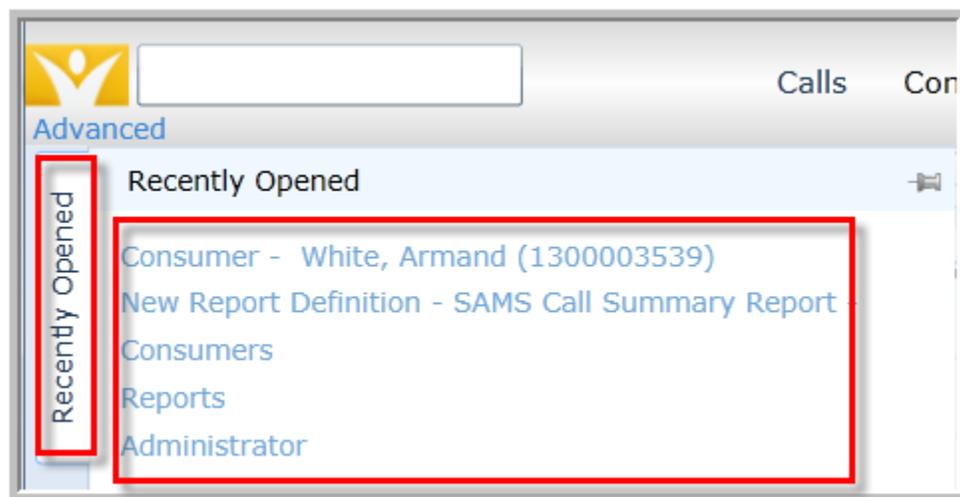


Select the buttons that you want to be able to see in the Main Toolbar and move them above the word "More" using the Move buttons on the right. You can also change the order of the buttons as needed using this method.

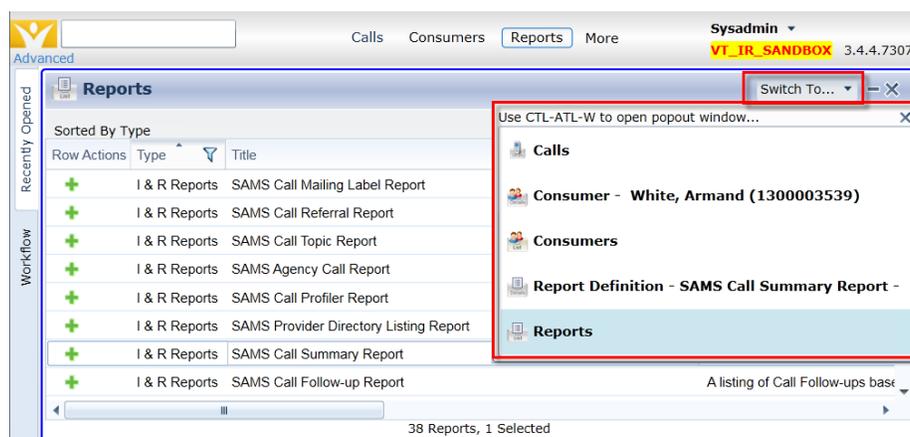


**Note:** You will only be able to see buttons that open the sections that your user role has access to view, so your view may be different than what's shown here.

The *Recently Opened* tab on the left of the screen contains links to recently opened screens in SAMS. To reopen a screen, click the link:



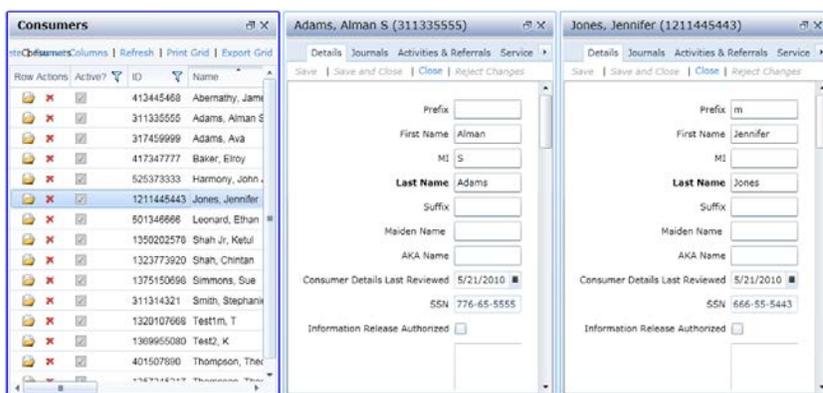
The *Switch To* button in the upper right appears when you have a record open and will allow you to quickly navigate to any other record that you have open in the background.



## Window Management

Multiple windows can be opened in SAMS I&R. When more than one window has been opened in a section of the application, the most recently opened window will be the active window, with the other windows concealed behind it.

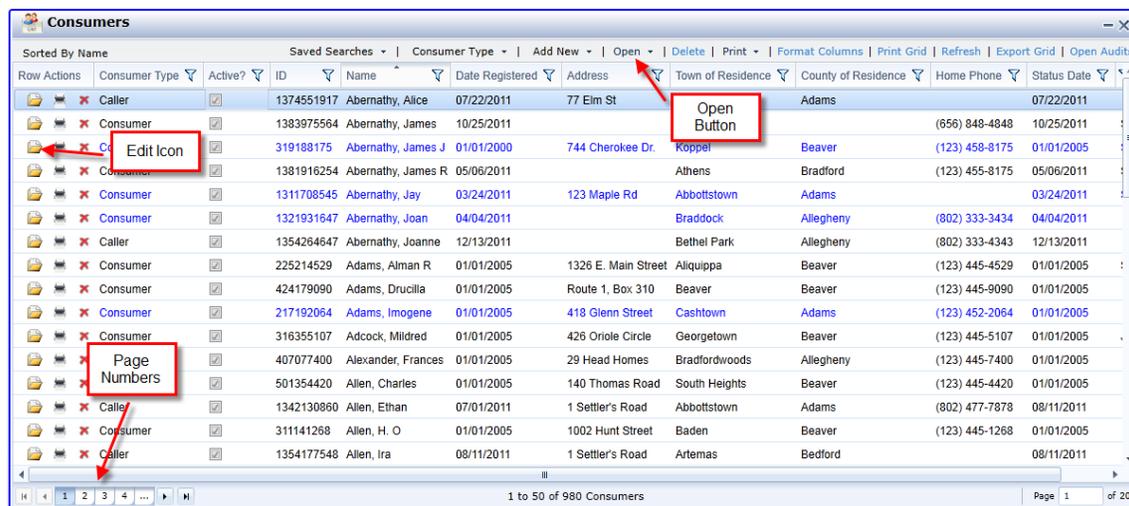
If the minimize  button is clicked in the active window, all windows in that section will open in a tiled view. The windows can be rearranged by dragging and dropping, or individually closed by clicking the close  button.



When a maximize button  is clicked in a tiled view, that window will expand and fill the Work Pane, while the remaining windows will become inactive and be concealed behind the active window.

## List Screens

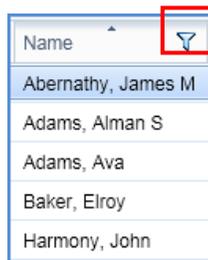
In the Consumers, Rosters, Calls, Routes, Reports and Finance sections of SAMS, record appear in a **List Screens**. An item in a List Screen can be opened by double-clicking, clicking the Edit button, or by selecting it in the list and clicking the **Open** button in the toolbar.



List Screens may appear in pages to enable faster loading. To move from one page to another, either click a page number or an arrow key located in the *Status Bar* at the bottom of the screen.

## Sorting and Filtering Columns

List screens can be sorted by clicking on a column heading. A small arrow will appear in the column that the list screen sorted by, indicating whether the column is sorted in ascending or descending order.



A list screen can be filtered by clicking on a Filter  icon in a column heading. The filtering options that appear will vary, depending on the column heading that you select. To apply a filter, enter the desired criteria and click *Apply Filter*. To remove the filter from the selected column, click *Clear Filter*. If more than one filter has been applied to a list, they all can be removed by clicking *Clear All Filters*.



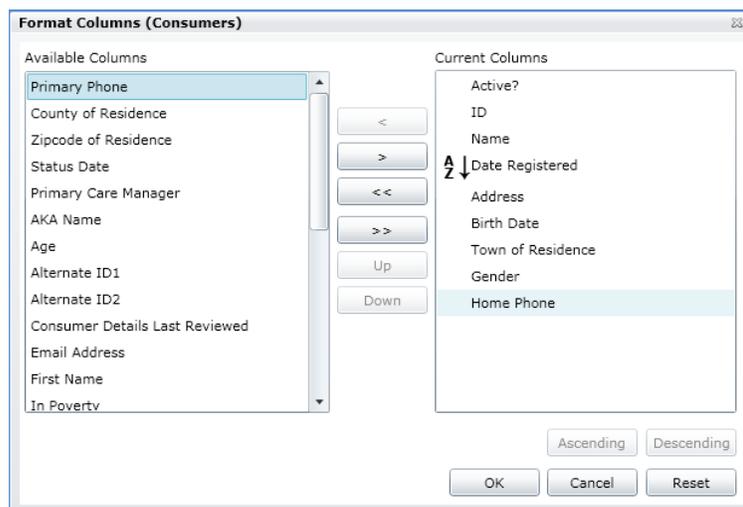
In this example, the Date Registered column of the Consumer List was selected and filters were applied that will cause it to show only Consumers who registered between June 1 and December 31, 2011.

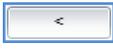
## Moving, Resizing and Changing Columns

A column can be easily be moved by clicking on the header and dragging it to a new location, or resized by clicking on the separator bar between column headings and dragging it until the column is the desired size.

To add a column to a list screen:

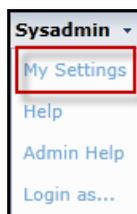
1. Click on the Format Columns  button in the tool bar.
2. A window will appear that shows the columns that are currently in the list on the right side, with additional available columns on the left.



3. Select the column from the Available Columns pane
4. Click the Move Column Right  button.
5. To remove a column from the list screen, select it from the Current Columns pane and click the Move Column Left  button.

## Customizing the Look and Feel via *My Settings* Options

The *Grid Settings*, *Default Settings*, *Care Plan Settings*, *Assessment Settings* and *I & R Settings* can be customized by clicking on **My Settings** in the dropdown list by the name of the logged in user in the Main Toolbar.



The *Grid Settings* section of the screen allows you to change fonts and colors by selecting from the available dropdown lists. The name and address fields to the right will display the changes as you make your selections.

To change a font, click the dropdown arrow  to the right of the *Font* field and select the desired font. Change the font size in the same manner.



The screenshot shows the 'Grid Settings' panel on the left and a data table on the right. The settings include:

- Font: Arial
- Font Size: 12
- Font Color: Black
- Row Background Color: White
- Alternate Row Background Color: White
- Caregiver Font Color: Blue
- Roster HighLight Color: Yellow
- Rows per Page: 500

The data table on the right has the following content:

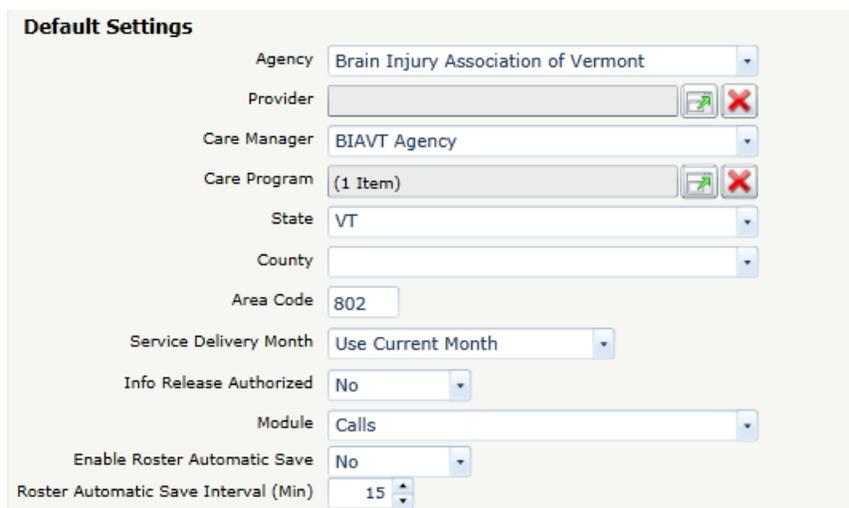
Name	Address
John Smith	123 Main St.
Mary Jones	4050 N. Mountain Dr.
April Billings	1 Hollywood Blvd.
Robert Basket	98 Southern Pine Rd.

*Default Settings* can be used to select data entry defaults that apply when creating new Consumer Records and Service Deliveries. Each field contains a dropdown list that displays the available choices.

### TIP



VT users should set their agency as the Default Care Manager under the Default Settings section. This will ensure that newly created consumers are correctly associated with your agency.



The screenshot shows the 'Default Settings' form with the following values:

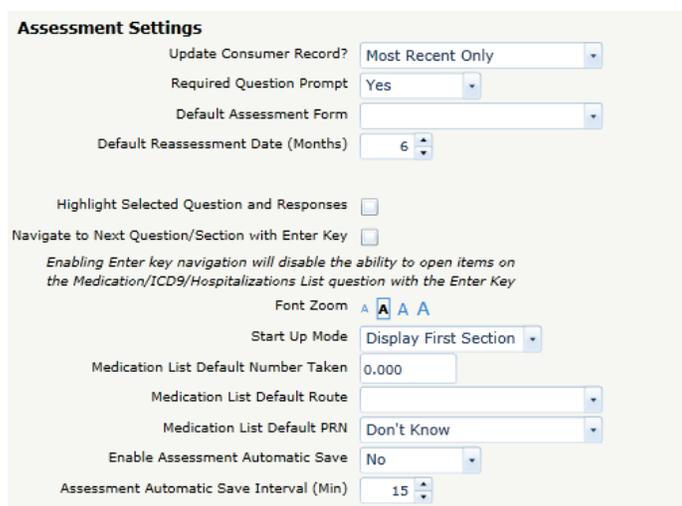
- Agency: Brain Injury Association of Vermont
- Provider: (empty)
- Care Manager: BIAVT Agency
- Care Program: (1 Item)
- State: VT
- County: (empty)
- Area Code: 802
- Service Delivery Month: Use Current Month
- Info Release Authorized: No
- Module: Calls
- Enable Roster Automatic Save: No
- Roster Automatic Save Interval (Min): 15

*Assessment Settings* allow users to define the behavior and default related to Assessments sessions.



### TIP

The recommended setting for *Update Consumer Record?* is "Most Recent Only". This will ensure that the latest information is retained in the consumer record.



**Assessment Settings**

Update Consumer Record? Most Recent Only

Required Question Prompt Yes

Default Assessment Form

Default Reassessment Date (Months) 6

Highlight Selected Question and Responses

Navigate to Next Question/Section with Enter Key

*Enabling Enter key navigation will disable the ability to open items on the Medication/ICD9/Hospitalizations List question with the Enter Key*

Font Zoom A A A

Start Up Mode Display First Section

Medication List Default Number Taken 0.000

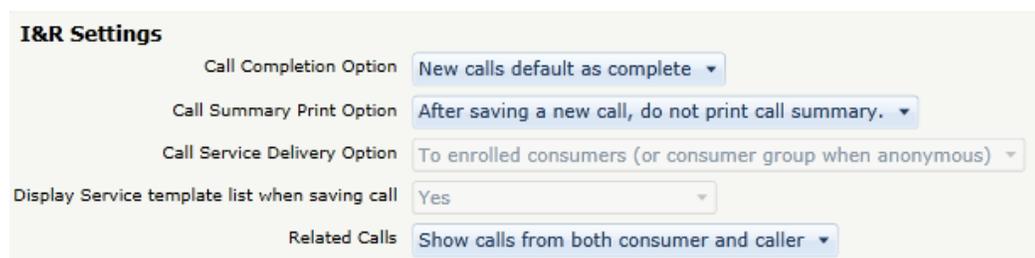
Medication List Default Route

Medication List Default PRN Don't Know

Enable Assessment Automatic Save No

Assessment Automatic Save Interval (Min) 15

*I & R Settings* allow you to set Call Completion and Call Summary Print Options. In addition users can change the behavior of the Related Calls panel. Service Delivery options are displayed here, but are set by your administrator.



**I&R Settings**

Call Completion Option New calls default as complete

Call Summary Print Option After saving a new call, do not print call summary.

Call Service Delivery Option To enrolled consumers (or consumer group when anonymous)

Display Service template list when saving call Yes

Related Calls Show calls from both consumer and caller

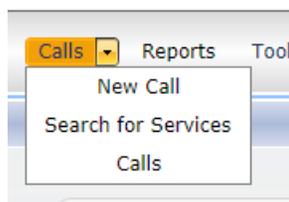
After you've completed your changes click the Save [Save](#) button to have them take effect.

## Format Property List Settings

SAMS allows users to suppress and re-order fields on the following screens:

- Consumers
- Callers
- Calls
- Consumer Registration
- Consumer Groups
- Service Deliveries
- Service Plans

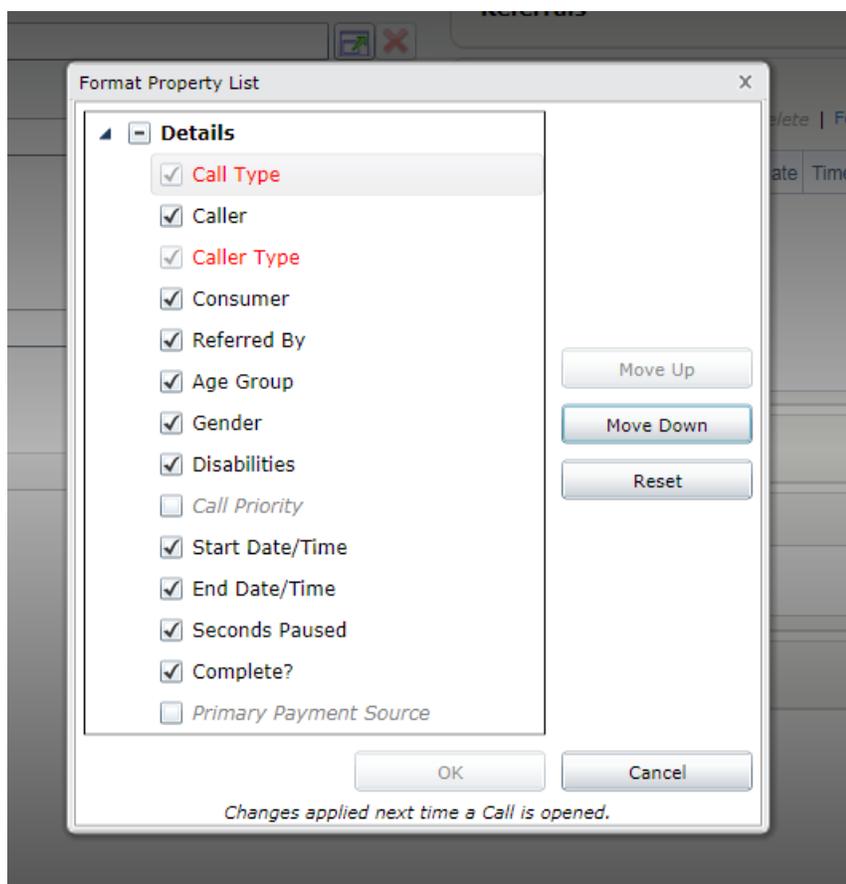
1. Click on Calls drop down arrow and select **New Call**



2. Scroll to the bottom of the screen and click **Format Property List**.
3. You will be presented with the format list dialog. Uncheck the fields you want to hide from view.

**TIP**

VT users should deselect the Call Priority and Primary Payment source fields as these elements are not currently being used.



These same basic steps work in each of the areas where this functionality is supported. You can also enact the dialog via a right-click in most of the areas.



#### **NOTE**

Changes made to the Format Properties List are not applied until the next time you open a record.

## **IR Call Sessions**

The Calls feature of Harmony for Aging is the primary section for data tracking for users performing the initial intake or point of contact from a potential consumer. Within this area of the application, call specialists will be able to record all important information relevant to the call, and make the appropriate referral.

All call records will track the caller, the consumer, and the relationship as defined by the different *Types of Calls* listed below. Also tracked as details of the call are the source of the call, the type and priority of the call, start and end dates/times, the call's completion status, and general notes taken on the call.

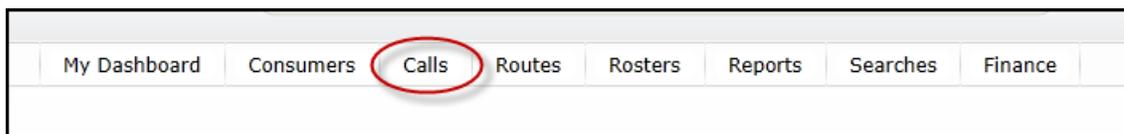
### **Types of Calls**

SAMS I&R can record many types of calls including:

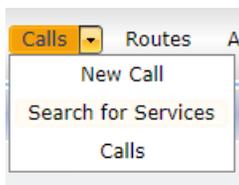
- Anonymous Caller about a Named Consumer: an unknown caller phoning on behalf of an identified consumer.

- Named Caller about a Named Consumer: an identified caller phoning on behalf of a known consumer or potential consumer.
- Named Caller about an Anonymous Consumer: an identified caller phoning on behalf of an unknown consumer.
- Consumer Call: a consumer phoning to obtain information for him or herself.
- Anonymous Call: neither the caller nor the consumer has been identified.

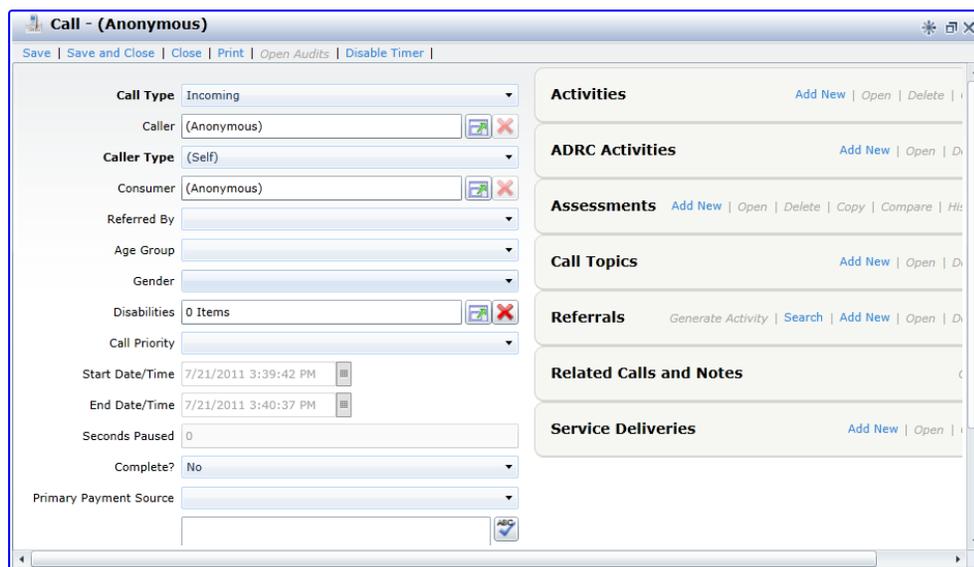
Below is a screenshot showing the Calls button in the main toolbar of SAMS I&R:



A new call session is typically started by clicking on the dropdown arrow located beside Calls:

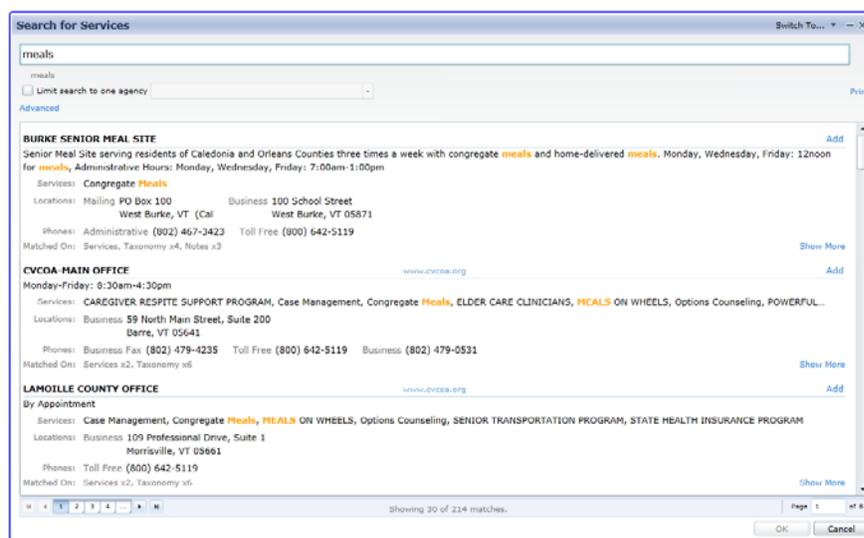


**New Call Button** – this button initializes a new call and opens the New Call Screen. The Call Summary screen is used to log new calls.

A screenshot of the 'Call - (Anonymous)' screen. The screen is divided into two main sections. The left section contains various fields for call information, including 'Call Type' (Incoming), 'Caller' (Anonymous), 'Caller Type' (Self), 'Consumer' (Anonymous), 'Referred By', 'Age Group', 'Gender', 'Disabilities' (0 Items), 'Call Priority', 'Start Date/Time' (7/21/2011 3:39:42 PM), 'End Date/Time' (7/21/2011 3:40:37 PM), 'Seconds Paused' (0), 'Complete?' (No), and 'Primary Payment Source'. The right section contains several tabs for related information: 'Activities', 'ADRC Activities', 'Assessments', 'Call Topics', 'Referrals', 'Related Calls and Notes', and 'Service Deliveries'. Each tab has a 'Add New' button and other options like 'Open', 'Delete', 'Copy', 'Compare', etc.

**Search for Services Button** –brings up a window that allows you to search for providers offering specific services. In the example below, we entered the term “meals” in the search field, and SAMS I&R returned a list of providers who have the term “meals” in their record. The list can be narrowed down further by typing more search terms. For example, you might search for “meals” and “Burlington” to locate provider who offer meals services in the city of Burlington. Areas of the provider record that are searched when using the Search for Services are as follows:

Accessibilities	Languages	NPI	State
Agencies only	Long Description	Provider Types	Town
County	Medicaid #	Services	URL
Eligibilities	Medicare #	Service Areas	Zip
Email	Municipality	Service Taxonomies	
Fees	Name	Short Description	
Keywords	Notes	Sites (names only)	



Optionally, users may choose to do a more targeted search by clicking the *Advanced* search button in the upper left. Whereas the global search looks for your search terms anywhere in the Provider record, the Advance Search allows you to search across one or more specific fields and requires a “match all” to return results.

Search for Services

Limit search to one agency

Advanced

Service: transportation

Provider Name:

Keywords:

Town:

County:

State:

ZIP:

Service Areas: chittenden

Taxonomy Code:

Site:

Agency:

Provider Type:

Provider Url:

Provider Email:

Accessibility:

Eligibilities:

Notes:

Long Description:

Short Description:

Languages:

Medicaid No:

Medicare No:

NPI:

Service Rate:

Search

Clear

Print

---

**CHITTENDEN COMMUNITY ACTION / CVOEO** [http://www.cvoeo.org/index.cfm?fuseaction=dep\\_menu&menu\\_id=5007&dept\\_id=4](http://www.cvoeo.org/index.cfm?fuseaction=dep_menu&menu_id=5007&dept_id=4) [Add](#)

Chittenden Community Action provides a broad base of services and programs for low income residents of Chittenden County. Emergency services include, fuel/utility assistance, housing assistance, transportation, pharmacy co-payments, Farm to Family coupons, assistance obtaining identification, furniture vouchers, free plants, seeds and seedlings, etc. Other services that are provided include, advocacy, information and referral, forms assistance, food stamp outreach and eligibility screening, tax preparation, nutrition education activities for children and adults and car loan application...

Services: ADVOCACY, BENEFIT APPLICATIONS, COMMUNITY GARDENING, FARM TO FAMILY COUPONS, HOUSEHOLD GOODS VOUCHERS, HOUSING SEARCH ASSISTANCE, IDENTIFICATION...

Locations: Mailing PO Box 1603 Burlington, VT (Chi) Business 255 S. Champlain Street Suite 9 Burlington, VT 05401

Phones: Administrative (802) 863-6248 Business Fax (802) 859-3462 Toll Free (800) 287-7971 After Hours (800) 287-0589

Matched On: [Show More](#)

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**SPECIAL SERVICES TRANSPORTATION AGENCY** [www.sstaride.org](http://www.sstaride.org) [Add](#)

Monday-Friday: 8:00am-5:00pm

Services: MEDICAID RIDES, SPECIAL TRANSPORTATION SERVICES, TILLEY DRIVE SHUTTLE

Locations: Business 2091 Main Street Colchester, VT 05446

Phones: Business (802) 878-1527

Matched On: [Show More](#)

Showing 2 of 2 matches.

OK Cancel

- **Call Button** – this button brings up a list of all calls logged to the system. The list can be sorted, filtered, or searched, similar to the way the SAMS I&R Consumer List can be sorted, filtered, and searched. You can also use this screen to Print-Preview a call record, you can move and size the columns, and if you right click or go to the View menu, you can select Format Columns and choose which columns to present in your display. You can access the Call Log by hovering your mouse over the "Calls" button and choosing "Calls" or by simply clicking on the Calls button.

Row Actions	Start Date/Time	End Date/Time	Agency	Call Type	Caller	Caller Type	Consumer
	05/10/2011 10:41 AM	05/10/2011 10:42:00 AM		Incoming	(Anonymous)	(Self)	(Anonymous)
	05/05/2011 12:22 PM	05/05/2011 12:40:17 PM		Email	Jones, Irene	Other	(Anonymous)
	04/04/2011 02:13 PM	04/04/2011 02:13:31 PM		Incoming	(Anonymous Caller)	(Self)	(Anonymous Consu
	12/17/2010 10:33 AM	12/17/2010 10:36:38 AM		Incoming	(Anonymous)	(Self)	(Anonymous)
	12/16/2010 03:59 PM	12/16/2010 04:21:23 PM		Incoming	Abernathy, James J	(Self)	Abernathy, James J
	12/16/2010 03:53 PM	12/16/2010 03:58:47 PM		Incoming	(Anonymous)	(Self)	(Anonymous)
	11/02/2010 10:24 AM	11/02/2010 10:35:27 AM		Incoming	Abernathy, James J	(Self)	Abernathy, James J
	11/02/2010 10:21 AM	11/02/2010 10:23:30 AM		Incoming	(Anonymous)	(Self)	(Anonymous)
	10/19/2010 01:21 PM	10/19/2010 01:24:05 PM		Incoming	Mullins, Nancy	(Self)	Mullins, Nancy
	05/17/2010 02:19 PM	05/17/2010 02:29:07 PM		Incoming	(Anonymous)	Other	Jones, Mary
	05/17/2010 09:16 AM	05/17/2010 09:17:07 AM		Incoming	(Anonymous)	Other	Williams, Mary
	05/16/2010 03:29 PM	05/16/2010 03:34:59 PM		Incoming	(Anonymous)	Other	Dawson, Terri I
	05/15/2010 02:09 PM	05/15/2010 02:17:02 PM		Incoming	(Anonymous)	Other	Williams, Mary
	10/16/2009 01:52 PM	10/16/2009 01:54:33 PM		Email	(Anonymous)	Other	Taylor, Corine
	09/15/2009 10:50 AM	09/15/2009 11:05:44 AM		Incoming	Abernathy, James J	(Self)	Abernathy, James J
	05/29/2009 11:04 AM	05/29/2009 11:04:32 AM		Incoming	Dowlen, Annie	(Self)	Dowlen, Annie
	05/29/2009 11:03 AM	05/29/2009 11:03:18 AM		Incoming	Dorn, Minnie	(Self)	Dorn, Minnie
	05/29/2009 11:03 AM	05/29/2009 11:03:05 AM		Incoming	Catron, Robert R	(Self)	Catron, Robert R

## Starting a New Call Session

To begin a new call session, hover your mouse over the Calls button and click **New Call**. This will open the New Call screen:

The screenshot shows the 'New Call' screen with three numbered callouts:

- 1**: Call Toolbar (Save, Save and Close, Close, Reject Changes, Print, Open Audits, Format Panels, Double Timer, Pause, Search for Services, Add New)
- 2**: Call Information section (Call Type: Incoming, Caller: (Anonymous), Caller Type: (Self), Consumer: (Anonymous), Referred By, Age Group, Gender, Disabilities, Call Priority, Start Date/Time, End Date/Time, Seconds Paused, Complete?, Primary Payment Source)
- 3**: Call Details section (Activities, ADRC Outcomes, Assessments, Call Topics, Notes, Referrals, Related Calls, Service Deliveries)

## Call Session Screen Elements

The Call Screen contains three functional areas: 1) The **Call Toolbar** 2) The **Call Information** section and 3) The **Call Details** section.

The **Call Toolbar** Buttons (1) are used to support call management.

- **Save** – Allows you to update the record without closing it.
- **Save and Close** – Allows you to update the record with any changes you've made and then closes the record from the current view.
- **Close** – This button allows you to leave the record without making any changes to the record's existing data.

- **Print** – Creates a printout of the call.
- **Open Audits** – allows you to see any changes made to the call record.
- **Format Panels** – Allows you to customize the look and feel of your call screen.
- **Disable Timer** – Provides a mechanism to stop the call timer. When you press the Disable Timer button the system changes the label to Enable Timer, and it runs a timer that counts the number of seconds in pause mode. To resume the timer, click the button again.
- **Pause** – Allows you to temporarily pause the call timer.
- **Search for Services** – Allows for another option for searching for services during a call.

The **Call** Information Section (2) is used to record data about the caller, consumer and call characteristics:

- **Call Type** – The call type might not actually be a “call” at all, but rather a walk-in, a fax, an e-mail, or some other communication. Call Type exists to aid in reporting on the various forms of inquiry and the volumes associated with different avenues used by “callers” to access information.
- **Caller** – The system defaults this field to Anonymous. If information about the caller has been made available, you also have the option to search the database for a Consumer record that might match the Caller’s details.
- **Caller Type** – Classifies the caller’s relationship to the stakeholder of the call. Caller Type can be self, agency, community organization, friend, neighbor, etc.
- **Consumer** – The caller may be calling on behalf of a person who is a Consumer in SAMS I&R, or the caller may be the Consumer. This section takes you to the Search Consumers window so you can pull in an existing record rather than creating one that might be a duplicate.
- **Referred By** – If the incoming call resulted from a referral of another organization, that data may be recorded here to document the history of the inquiry and to support reporting on incoming referrals.
- **Age Group** – This field enables the capture of data about the age of the person the caller is discussing. This field can be manually entered for anonymous calls, or is automatically populated based on the consumer that is selected.

- **Disabilities** – When the person being discussed has one or more disabilities, this field enables capture of the information to support reporting, intake, assessment, and service management purposes.
- **Call Priority** – Calls may be classified by the urgency of the information in the discussion. Emergency calls involve situations where the person being discussed may be at risk of imminent danger to self or to/from others. (Note: This element is not currently used by VT users.)
- **Start Date/Time** – SAMS I&R will automatically enter this information for you, however the entry may be overridden when appropriate.
- **End Date/Time** – SAMS I&R will automatically enter this information as well, and it can be overridden when appropriate.
- **Seconds Pause** – Total time the call was paused.
- **Complete?** – This element allows you to track the status of a call. Complete implies that all available data has been obtained and recorded.

The **Call Details** section (3) is used to record call outcomes and details about the call:

- **Activities** – In SAMS I&R, activities are calendar-driven reminders to take **follow up action** on one or more items discussed in the context of a call. Activities are “ticklers” that carry a **due date**. Once marked as complete, SAMS I&R will remove the reminder from active items needing attention. Activities will show up on SAMS I&R Dashboards and provide automatic alerts. (Note: This module is not currently used by VT users.)
- **ADRC Outcomes** – ADRC Outcomes are a specific set of **call outcomes** that are recorded for **reporting purposes**. These outcomes are marked by checking a box to indicate the call disposition or handling. ADRC Outcomes include Mailed Information; Required I&A Follow Up Contact, and a variety of Referral actions.
- **Assessments** – Assessments are forms used to collect data about a Consumer or Caller. In most cases you’ll be assessing the Consumer and not the Caller. Use of custom assessment forms that are used within calls allow administrators to create “scripts” that can be followed by your call specialists, ensuring accurate and consistent data collection.
- **Call Topics** – SAMS I&R allows the user to track all topics of discussion with the caller and/or consumer. Topics are used to classify calls to enable better reporting of call activity as a whole.

Topics may range from Adult Day Care, to Legal Services, to Transportation, to Insurance.

- **Notes** – This section is a free-form text entry field that enables recording of comments about the call. These comments are saved with the call record.
- **Referrals** – Referrals are created when a Consumer or Caller is given a recommendation or suggestion to transfer the request for assistance to another entity. Referrals are typically made to help a caller identify potential providers or facilities that may offer the desired services.
- **Related Calls and Notes** – Automatically displays the date, time and notes from any other calls that contain the same caller or consumer as the current call. Related calls that display here can be opened by double-clicking.
- **Service Deliveries** – Upon save and close of a call users will be presented with a popup dialog prompting them to select one or more service deliveries to record. In addition, Service Delivery records can be viewed, added and/or edited via the Service Deliveries panel on the call screen.

#### **NOTE**



**ADRC Outcomes** is simply a way to record the outcome of a call. The ADRC Outcomes information is primarily used as a data element in reporting and analysis of the organization's calls.

### **To Start a New Call Session**

1. Click the **Calls** button on the Main toolbar then select **New Call**.
2. Add a **Caller** to your call by browsing for an individual or by creating a new record. Click the browse icon next to the Caller field.



**Tip:** There may be instances where it makes more sense to collect data about the *Consumer* first. The order of selection for the **Caller** or **Consumer** is irrelevant.

In the Search Screen, 1) Enter the name of the Caller then click **Search**  
 2) Select the name from the Search Results or, if there are no results or the correct name doesn't appear, 3) click **Add New** to add a new record.

Search for Consumer

Global Search | Advanced Search

Please enter search criteria in one of the following fields

Search for:  Search

All Words  OR  Exact Phrase

Phone:  Search

Location:  Search

All Words  OR  Exact Phrase

Search for: westine

Format Columns

Consumer Typ	Active	ID	Name	Date Register	Address	Town of Resident	County of Re
Consumer	<input checked="" type="checkbox"/>	130003453	Westine, Charlotte	07/10/2013	+009 Westine Road	Battleboro	Windham
Consumer	<input type="checkbox"/>	130001410	Westine, Hugh	02/18/2004	+009 Westine Road	Rutland City	Rutland
Consumer	<input type="checkbox"/>	130004407	Westine, Joan	05/18/2007	+009 Westine Road	Rutland City	Rutland

3 Consumers Displayed

## Creating a New Caller or Consumer

If during the search for consumers you do not find the caller or consumer, you will need to add a new record. On the 'Search for Consumer' search results screen, there is an option to "add new".

- Click **Add New**. SAMS I&R will bring up the **Add Consumer/Caller** window.

Add Caller

Basic Information

First Name  MI  Last Name

Gender  
 Unknown  
 Female  
 Male

Date Registered  DOB

Default Agency  Primary Ethnic Race  Nationality

Home Phone  Area Code  Number  Extension

Default Provider

Email Address

Addresses

Home Address

Same for Mailing

Address 1  Address 2  County

Town  State  Zip Code  Municipality

Country

Format Property List

OK Add Next Cancel

- b) Enter as much information as necessary on each section of the Add Caller dialog.

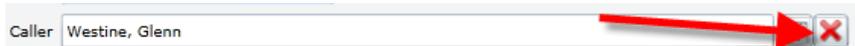


**Tip:** As you add information the system will warn of any consumers that already exist in the database that might be a duplicate of the consumer you're creating. If a match is found, double click on the record in the lower half of the pane to use the existing consumer which will cancel the process of creating a new consumer.

- c) When you're finished, click **OK** and the new caller will be created and added to you call.



**Tip:** To change the Caller associated with your call, click the red "X" button to the right of the Consumer or Caller field. This will revert the Caller to Anonymous.



3. Select the appropriate **Call Type**.

4. Next, select the appropriate **Caller Type**. If the default selection of **(Self)** is retained, the **Consumer** selection will populate with the caller automatically. If a different caller type is desired, then browse for the consumer following the same process as outlined in step 2.

5. Select the appropriate source in the **Referred By** dropdown.

6. **Age Group**, **Gender** and **Disabilities** can be selected if desired for more detail about the consumer. Age Group and Gender will populate

automatically if the consumer's *Date of Birth* and *Gender* have been populate in the consumer record.

Referred By	Called Before
Age Group	91 - 95
Gender	Male

7. Note the **Start Date/Time** and **End Date/Time** will populate automatically based on the current date/time. To edit these values you must first click the Disable Timer button at the top of the Call screen.

Start Date/Time	7/22/2011 9:14:42 AM
End Date/Time	7/22/2011 10:12:03 AM
Seconds Paused	0



**Tip:** To edit the start and end date/time values you must first click the Disable Timer button at the top of the Call screen. This will allow you to back date calls that are being entered in SAMS at a later date.

8. Set the call completion status with the **Complete?** selection. This will likely be set in actual usage at the conclusion of the call when follow up tasks are known.

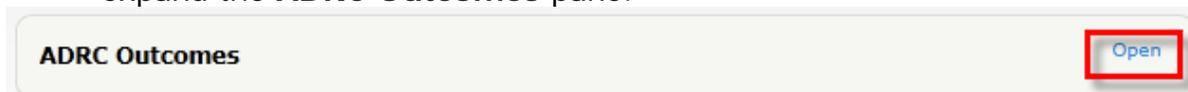
Complete?	No
-----------	----

9. Review completed call details.

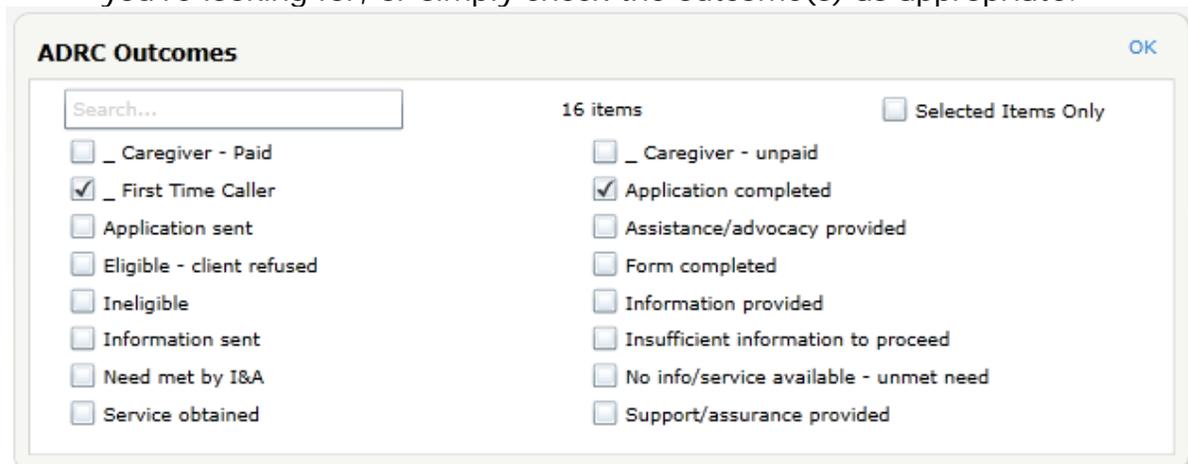
Call - (Anonymous) - 6/2/2015 2:06 PM	
Save   Save and Close   Close   Print   Open Audits   Format Panels   Disable Timer   Pause   Search for Services   We	
OK	
Call Type	Incoming
Caller	Westine, Glenn
Caller Type	Family Member - Adult Child
Consumer	(Anonymous)
Referred By	Called Before
Age Group	66 - 66
Gender	Male
Disabilities	Hearing
Start Date/Time	6/2/2015 2:06 PM
End Date/Time	6/2/2015 4:49 PM
Seconds Paused	0
Complete?	No
<a href="#">Format Property List</a>	

## To Add ADRC Outcomes:

1. Continuing with the call session already started, click the **Open** button to expand the **ADRC Outcomes** pane.



2. From here you can use the search dialog to filter to the ADRC Outcomes you're looking for, or simply check the outcome(s) as appropriate.



## To Add Call Topics:

1. Click **Add New** in the section for **Call Topics** and choose the desired items by checking the appropriate boxes in the top section of the **Add Call Topics** window.

Call - (Anonymous) - 6/2/2015 2:06 PM

Edit Call Topic

OK Cancel

Include?	Topic	Category	Outcome
<input type="checkbox"/>	3SQVT 020	Benefit Programs -IR	
<input type="checkbox"/>	3SQVT active issue x020j	Benefit Programs -IR	
<input checked="" type="checkbox"/>	3SQVT application approved 020c	Benefit Programs -IR	
<input type="checkbox"/>	3SQVT info only 020k	Benefit Programs -IR	
<input type="checkbox"/>	3SQVT new application 020a	Benefit Programs -IR	
<input type="checkbox"/>	Accessibility Issues	Housing -IR	
<input type="checkbox"/>	Accessibility/Adaptive Equipment	Home Maintenance/Modification -IR	
<input type="checkbox"/>	ADL Assistance	Personal Care -IR	
<input type="checkbox"/>	Adult Day Programs	Long Term Care -IR	
<input type="checkbox"/>	Adult Family Care Homes	Long Term Care -IR	
<input type="checkbox"/>	Advance Dir. - Living Will 111	Legal -IR	
<input type="checkbox"/>	Advance Dir. - Living Will 111	Legal -IR	

Comments:

Time Spent: 0

Plannings:

Has current need or concern

Prevention or future planning

2. Optionally, you can enter **Topic Time**, **Comments** regarding the topic and any specified need for **Planning** around the topic in the bottom half of the window. (Topic Outcomes are not used by VT)
3. Click **OK** to commit and return to the call screen.

### To Add Call Notes:

Enter any comments about the call session in the **Notes** field. Any notations made here will be visible in subsequent call sessions for this consumer via the Related Calls panel.

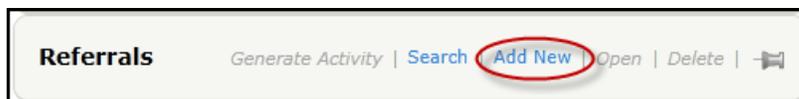
Notes

### To Add Referrals to a Call:

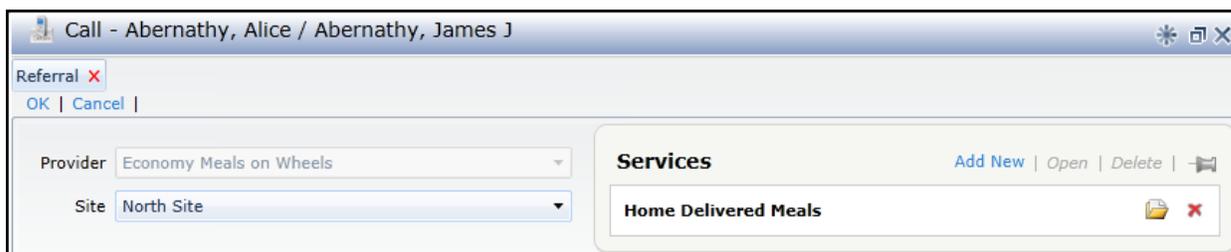
During a call session, the caller may request specific information about an organization at which time the worker can track a referral made to a provider. There are two options available for recording referrals made to the caller/consumer:

#### To add a new referral when the Provider is known

1. Continuing with the call session already started, click **Add New** in the Referrals section.

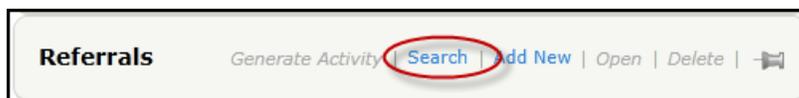


2. Select the Provider and, optionally, the site and service. Click **OK** to save the Referral.

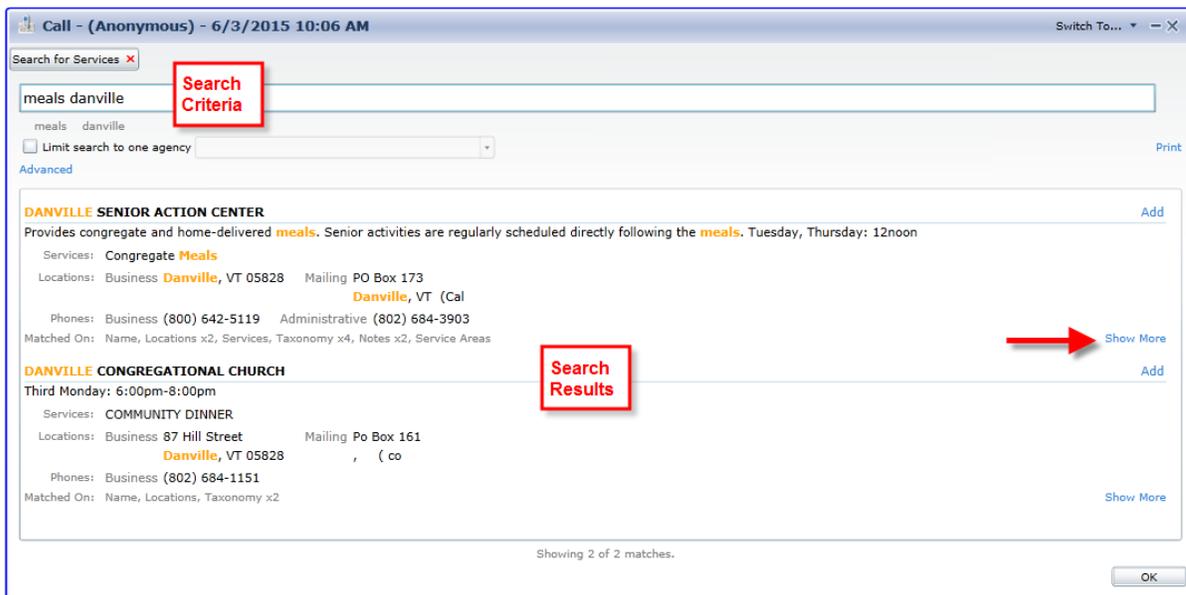


### To add a new referral when the Provider is unknown (Search for Services):

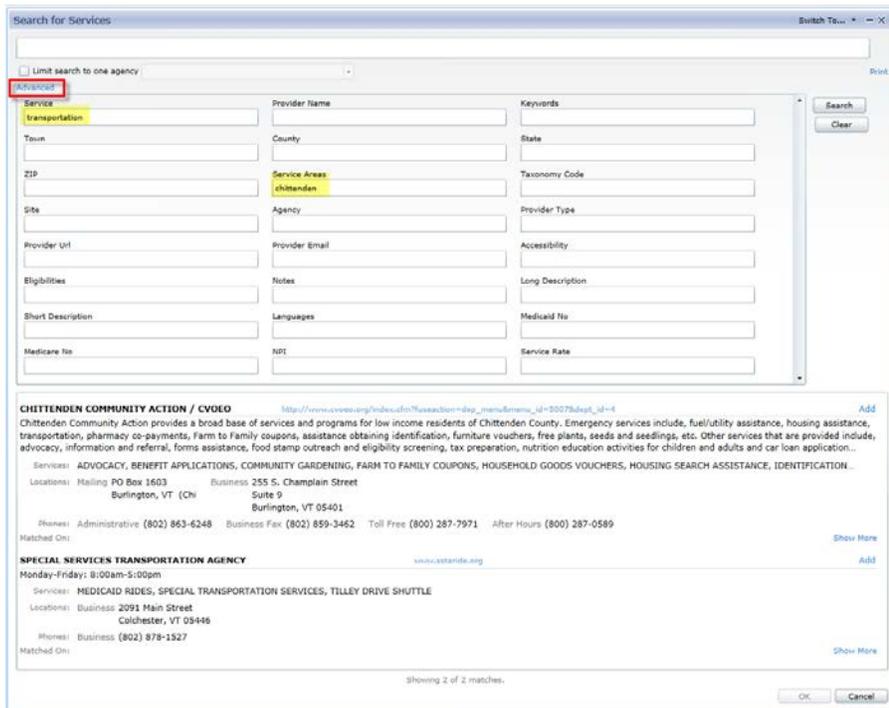
1. Click **Search** in the Referrals section.



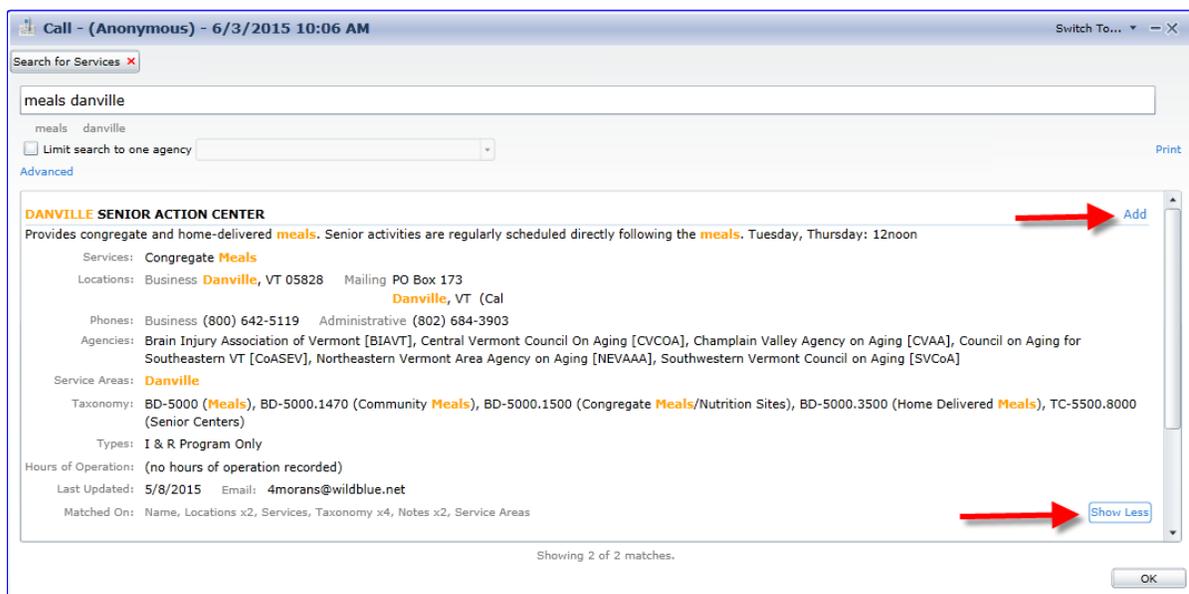
2. Type in any search criteria for the provider organization for which you wish to create a referral, such as the provider name, service names, taxonomy code, taxonomy term, location data, or any other identifiable characteristic. The search results will populate as you type. If needed, continue to type additional search words to narrow the resulting list of providers.



Optionally, users may choose to do a more targeted search by clicking the *Advanced* search button in the upper left. Whereas the global search looks for your search terms anywhere in the Provider record, the Advance Search allows you to search across one or more specific fields and requires a "match all" to return results.



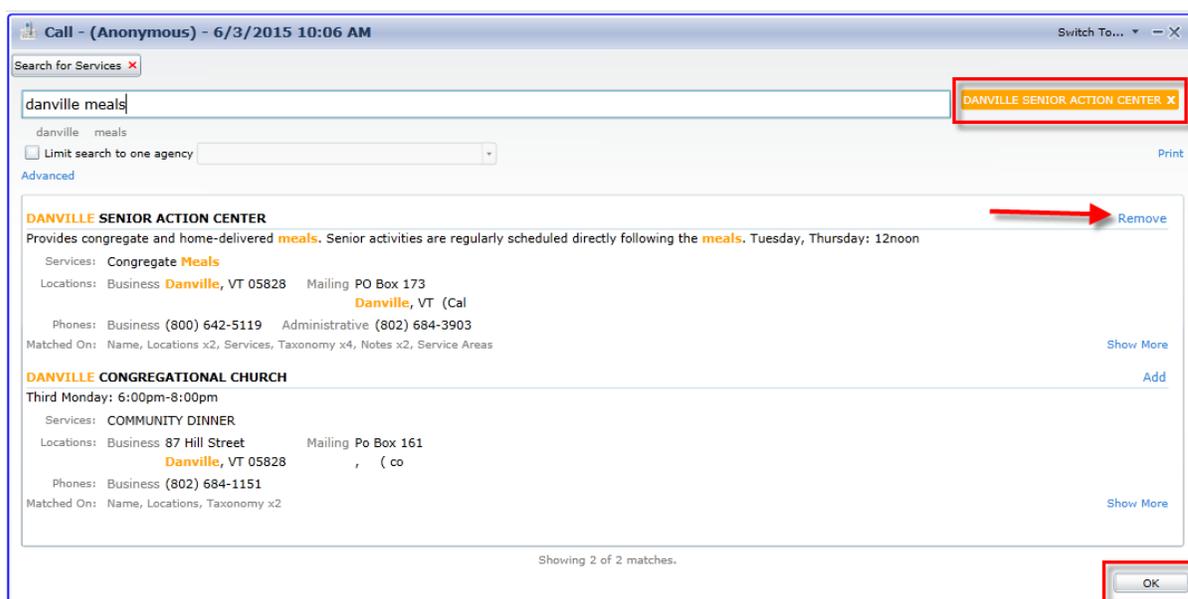
- The search results will populate in the lower portion of the screen. Note that the matching search criteria "Meals" will be highlighted in orange text.
- To view additional information about the provider, click **Show More**. This will expand the selection. To collapse the selection, click **Show Less**.



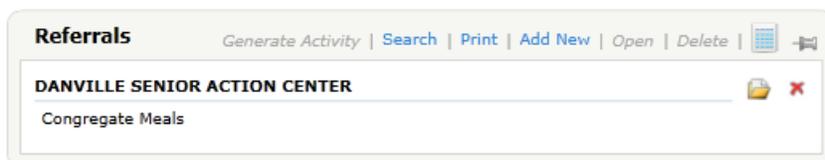
- To record that a referral was made the provider, click **Add**.
- A dialog box will pop up where you can specify the service(s) you're referring for. Select service(s) as appropriate then click **OK**.



- The new referral is now added to the call and will appear in the upper right hand corner of the Search for Services screen. Repeat for additional referrals. A referral can be removed by clicking **Remove** next to the referral name or by clicking the "X" next to the provider name in the upper right hand corner.



- When all referrals have been recorded, click the OK button in the lower right to close the Search for Services screen and return to the Call screen.



## Creating Assessments from the Call Screen

You can use Harmony I&R to record new assessments for both named and anonymous consumers/callers. Record an assessment from within a call or from within a consumer/caller record.

When you record an assessment for a named consumer/caller, the assessment can be retrieved from both the *Call Log* and the consumer/caller record. Access assessments for a current caller using the *Call* screen, or for an existing caller through their *Consumer* screen.

In the instance of an anonymous consumer, the assessment you complete will be associated with the call - not an actual person. If both the caller and consumer are anonymous, Harmony I&R only provides you with the option to add a consumer assessment, so that the anonymous caller essentially becomes both the caller and the consumer in the stored call record.

- Continuing with a Call session already started, Click **Add New** within the Assessments panel.



**Caution:** Before you can conduct an assessment for the **Consumer** or **Caller**, you must first associate that person with the Call.

2. Select the person you wish to assess (either the **Caller** or **Consumer**). Note that in most cases you'll be assessing the Consumer and not the Caller.



**Note:** In most cases you'll be assessing the Consumer and not the Caller.

**New Assessment**

**Caller**  
Abernathy Jr, James J

**Consumer**  
Abernathy Jr, James J

**Assessment Form** SAMS ILA (NSI).afm

**Author** Ryan Burdick

**Last Updated** 1/23/2004 12:04:38 PM

**Version** 1.0.11

**Care Program**

**Agency** Beaver County Office on Aging

**Provider** Economy Meals on Wheels

**Subprovider**

**Site**

**Date of Assessment** 11/14/2011

**Next Assessment Date** 5/14/2012

**Assessor Name** Jim Sackett

**Password**

**Verify Password**

**Comments**

OK

Cancel

3. Use the **Assessment Form** list to select the appropriate assessment form.
4. Enter the appropriate **Care Program, Agency, Provider, SubProvider** and **Site**.
5. Enter your name in **Assessor Name** field.

6. Harmony I&R automatically enters the *Date of Assessment* and *Next Assessment Date* using today's date and the *Reassessment Date* default. These date can be adjusted manually as necessary.
7. Click **OK** to load the assessment data entry screen.
8. When you first create an assessment, you may have to map assessment responses to fields within the consumer record. Several consumer fields, such as Ethnic Race, do not exactly match the responses available for the linked assessment question. Use the *Assessment Response* list to select the appropriate mapping choice and click **OK**.

Item Name	Value	Assessment Response
Nationality	Origin from original peoples of Asia/Pacific Isles	
Employment Status	Unknown	

9. Enter data into the assessment as outlined in the SAMS User's Guide or online *Help* files.

Call - Abernathy Jr, James J

Assessment X

Save | Save and Close | Close | Print | Edit | Find Question | Response History | Question Properties | Show Notes

Required Questions: 20 / 408 (4%) Total Questions: 26 / 450 (5%)

Sections Assessment View Narrative

SAMS ILA (NSI)

Cover Sheet

Client Identification

Emergency Contact

Directions to Client

Intake

Financial Resources

Health Assessment

Functional Assessment

Mental Health/Behavior

Home Environment

Informal Supports

Supplemental Tools

Client Identification

Enter the client's name prefix/salutation.

Mr.

1.a. What is the client's last name?

Abernathy

1.b. What is the client's first name?

James

1.c. What is the client's middle initial?

J

Enter the client's name suffix.

Jr

2. Enter the primary local client identifier for the client.

319188175

3.b. Enter the client's 'also known as' first name.

Jimmy

3.a. Enter the client's 'also known as' last name.

3.c. Enter the client's 'also known as' middle initial.

10. When finished, click **Save and Close**.

11. The assessment now appears in the Call screen. To edit an assessment, double-click it or press **Open** and make any changes necessary. To delete an assessment, highlight it and press the **Delete** button. Select **Yes** at the prompt.

12.

**Call - Abernathy Jr, James J**

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Disable Timer | Pause | Abernathy Jr, James J | Search for Services | Add New

OK

**Call Type** Incoming

**Caller** Abernathy Jr, James J

**Caller Type** (Self)

**Consumer** Abernathy Jr, James J

**Referred By**

**Age Group** 91 - 95

**Gender** Male

**Disabilities** 0 Items

**Call Priority**

**Start Date/Time** 11/14/2011 2:23:30 PM

**End Date/Time** 11/14/2011 3:14:02 PM

**Seconds Paused** 0

**Complete?** No

**Primary Payment Source**

**Activities** Add New | Open | Delete | Copy

Check in and confirm services  
Abernathy Jr, James J

**ADRC Activities** Open

Adult Protective Services      Emergency Services

**Assessments** Add New | Open | Delete | Copy | Compare | History

**SAMS Independent Living Assessment**  
Abernathy Jr, James J

**Call Topics** Add New | Open | Delete

**Notes**

**Referrals** Generate Activity | Search | Add New | Open | Delete

Beaver County Office on Aging

Beaver Falls Meal Site

**Related Calls** Open

9/6/2008 9:45:10 PM Abernathy, James J calling on behalf of Abernathy, James J

9/26/2008 1:39:14 PM Abernathy, James J calling on behalf of Abernathy, James J

9/27/2008 10:22:11 AM Abernathy, James J calling on behalf of Abernathy, James J

## Recording Service Deliveries

A call session between a worker and a caller that contains an inquiry and a response is defined as Information and Assistance (or "Information and Referral") service provided and needs to be tracked for reporting. SAMS I&R allows for these and other services to be created as deliveries at the conclusion of the call session, based on options set in the database.

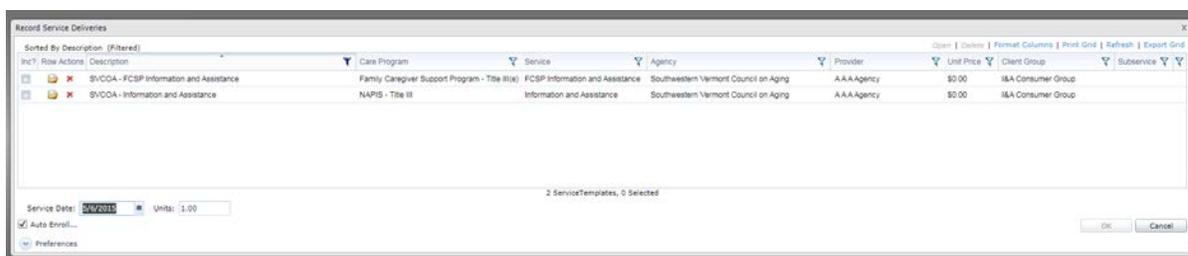
The automated delivery creation utilizes SAMS I&R for Service Templates which allows users to create service deliveries consistently by choosing pre-defined criteria from a list of templates. Call sessions containing an anonymous consumer will have service deliveries generated in a pre-defined aggregate consumer group, while a known consumer will have services generated in his or her consumer record.



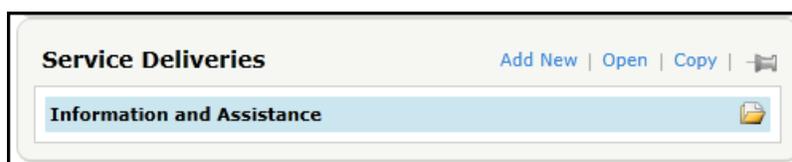
**Note:** Service Templates are created by your administrators and made available for use within calls.

The steps outlined below are for the completion of the call session. Deliveries can also be created by double-clicking the Service Deliveries section of the call session or from the consumer record.

1. Continuing with the call session already started, verify that all data has been captured in the appropriate fields and sections of the call and click **Save and Close**.
2. Upon Save and Close of a new call, the **Record Service Deliveries** template screen will pop up, select the pre-defined template accordingly.



3. Click OK to generate the delivery record for the call's consumer (or consumer group if anonymous). SAMS I&R will now show the Service Delivery on the Call Record.



## Adding Details to a New Consumer Record

There will be time that the Consumer information needs additional information. (For example, multiple phones or locations) The Details section of the Consumer Record contains two sections where additional information about the Consumer can be entered. The section on the *left side* of the screen is where basic demographics about the consumer, such as the name, marital status, gender and so forth, as well as NAPIS data and other important personal data are stored.

### To Access the Consumer record

From the call record screen you will notice the Caller and Consumer name on the Menu bar

**Call - Black, Rose(1348074764) - 5/6/2015 10:12 AM**

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Format Panels | Disable Timer | Pause | Search for Services | Duwall, Jesse | Black, Rose | Add New

OK

Call Type: Incoming

Caller: Duwall, Jesse

Caller Type: Other

Consumer: Black, Rose

Referred By:

Age Group: 75 - 120

Gender: Female

Disabilities:

Call Priority:

Start Date/Time: 5/6/2015 10:12 AM

End Date/Time: 5/6/2015 11:05 AM

Seconds Paused: 0

Complete?: No

Primary Payment Source:

Format Property List

**Consumer**

Activities

ADRC Outcomes

Assessments

Call Topics

Notes

Referrals

Related Calls

Row Actions	Start Date/Time	End Date/Time	Agency
	03/18/2015 11:48:31 AM	03/19/2015 11:55:55 AM	Region 3
	03/17/2015 10:36:51 AM	03/17/2015 10:37:03 AM	
	02/20/2015 09:18:46 AM	02/20/2015 09:36:12 AM	

Service Deliveries

Click directly on the name to go into the Consumer record.

**Consumer - Johnson, Jack (1305633504)**

Details | Activities & Referrals | Assessments | Billing | Calls | Care Plans | File Attachments | Journals | Routes | Service Deliveries | Service Orders

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

**Basic Information** [Open](#)

Name	Jack Johnson
Date Registered	10/31/2013
Consumer Details Last Reviewed	10/31/2013
Gender	Male
Information Release Authorized	No
Active	Yes
Status Date	10/31/2013

**NAPIS**

In Poverty?	Don't Know
Lives Alone?	Don't Know
High Nutritional Risk?	Don't Know
Is Rural?	No
NSIP Meal Eligible	No
Is Ethnic Race specified	No

**Insurance**

Medicare Eligible	No
-------------------	----

**Other Characteristics**

Employment Status	Unknown
Abused/Neglected/Exploited	No

**Care Enrollments** [Add New](#) | [Open](#) | [Delete](#) | [Print](#) | [Refresh](#)

NAPIS - Title III	10/31/2013 - (Not Specified)	<a href="#">Print</a>   <a href="#">Delete</a>
Active		
State Office On Aging		

**Directions To Home** [ABC](#)

**Locations** [Add New](#) | [Open](#) | [Delete](#) | [Copy](#) | [Print](#) | [Refresh](#)

Residence: 123 Easy St Adamsburg, PA 15611	<a href="#">Print</a>   <a href="#">Delete</a>
Westmoreland County	

**Notes** [ABC](#)

**Phones** [Add New](#) | [Open](#) | [Delete](#) | [Print](#) | [Refresh](#)

There are several ways that data can be entered in this section.

- To edit a text field, simply type in the field in these fields:

A.K.A Name Jackson

- To edit a radio button field, click the circle  next to the value you wish to choose:

Gender  Unknown  
 Female  
 Male

- To edit a dropdown field, click the down arrow  to expose the choices then select one with your mouse.

Marital Status Married

- To edit a Yes/No field, click in the box  to make a check indicating yes.

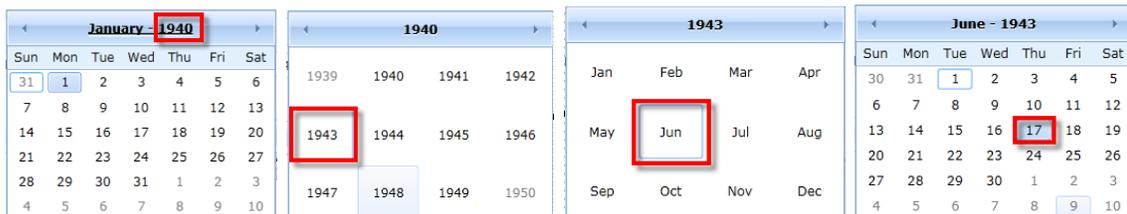
Active

- To edit a date field, either type in the date using the following format MMDDYYYY. *Do not enter the slashes.*

DOB 1/1/1939

Or click on the calendar  button to select the date from the calendar. Clicking on the year at the top of the calendar will allow you to select the year first, then the month, then the day.

For example, to change the date to June 17, 1943 click as follows:



The section on the right side of the screen contains expandable panels where additional information about the Consumer is stored, including:

- *Care Enrollments*
- *Care Managers*
- *Caregivers*
- *Care Recipients*
- *Contacts*
- *Custom Fields*
- *Ethnic Races*
- *Fund IDs*
- *Locations*
- *Phones*
- *Providers*
- *Service Suspensions*

The screenshot shows a web application window titled "Consumer - Johnson, Jack (1305633504)". The window has a menu bar with options: Details, Activities & Referrals, Assessments, Billing, Calls, Care Plans, File Attachments, Journals, Routes, Service Deliveries, Service Orders. Below the menu bar is a toolbar with buttons: Save, Save and Close, Close, Reject Changes, Print, Open Audits, Status Wizard, Merge, Add New. The main content area is divided into several panels:

- Basic Information:** Name: Jack Johnson, Date Registered: 10/31/2013, Consumer Details Last Reviewed: 10/31/2013, Gender: Male, Information Release Authorized: No, Active: Yes, Status Date: 10/31/2013.
- NAPIS:** In Poverty?: Don't Know, Lives Alone?: Don't Know, High Nutritional Risk?: Don't Know, Is Rural?: No, NSIP Meal Eligible: No, Is Ethnic Race specified: No.
- Insurance:** Medicare Eligible: No.
- Other Characteristics:** Employment Status: Unknown, Abused/Neglected/Excluded: No.
- Care Enrollments:** NAPIS - Title III, 10/31/2013 - (Not Specified), Active, State Office On Aging.
- Directions To Home:** (Empty panel)
- Locations:** Residence: 123 Easy St Adamsburg, PA 15611, Westmoreland County.
- Notes:** (Empty panel)
- Phones:** (Empty panel)

When a Consumer Record is opened, only the free text panels (**Directions to Home** and **Notes**) and panels that contain data will appear.

To add data to a panel that doesn't currently display in the Consumer Record:

1. click **Add New** in the Consumer Details toolbar and select the panel from the dropdown list.

The screenshot shows the "Add New" dropdown menu in the Consumer Record. The menu is open, showing a list of options: Care Enrollment, Care Manager, Care Recipient, Caregiver, Contact, Custom Field, Ethnic Race, Fund Identifier, Location, Phone, and Provider. The "Add New" button in the toolbar is highlighted, and the dropdown menu is open, showing the list of options. The background shows the "Basic Information" panel with fields for Prefix, First Name (Jack), MI, Last Name (Johnson), Suffix, and Hidden Name.

2. Enter the information in the screen that appears. In this example, the Contact's *Name*, *Type*, *Relationship*, *Primary* status and *Bill To* status can be entered on the left.

3. *Locations* and *Phones* can be entered in sub-panels on the right by clicking **Add New**.

4. After the information has been entered in the sub panel, click **OK** to save it. You can also close the subpanel without saving any changes by clicking **Cancel** or the red **X**.
5. After all of the information has been entered in the panel, click **OK** to save it and add it to the Consumer Record. You could also add another Contact by clicking **Add Next**.

**Consumer - Johnson, Jack**

Details | Activities & Referrals | Journals | Service Deliveries | Service Orders | Service Plans

Contact ✕ | OK | Cancel | **Add Next** | Add New ▾

**Type**: Family/Relative

**Name**: Joan Johnson

**Relationship**: Daughter

**Email Address**:

**Primary?**

**Is Bill To Contact?**

**Information Release Authorized?**

**Primary Phone**:

**Locations** Add New | Open | Delete | Copy |

**Residence**  
345 Easy St  
Bairdford, PA 15006  
Allegheny

**Notes**

**Phones** Add New | Open | Delete |

After you've completed your entries, click **Save and Close** to save the record and return to the Consumer List Screen. If you choose to continue working in the other areas of the record, *Activities and Referrals, Assessments, Billing, Care Plans, File Attachments, Journals, Routes, Service Deliveries, Service Orders* and it is recommended that you **Save** your work first. Note that access to these areas is permission based, so some may not be visible to you.

## Viewing and Editing Details in an Existing Consumer Record

To open an existing record, you can double click it, single click it and then click open Open in the consumer list toolbar, or click the edit icon to the far left of the record.

**Consumers**

Sorted By Name | Consumer Type ▾ | Add New ▾ | **Open** ▾ | Delete | Print ▾ | Format Columns | Print Grid | Refresh | Export Grid

Row Actions	Consumer Type	Active?	ID	Name	Date Registered	Address	Town of Residence	County of Residence	Home Phone
	Consumer	<input checked="" type="checkbox"/>	413445468	Abernathy, Jay	04/13/2010	1 First Street	Worcester	Worcester	(617) 656-554
	Consumer	<input checked="" type="checkbox"/>	311335555	Adams, Alman	05/01/2010	3 Third Street	Worcester	Worcester	(617) 333-444
	Consumer	<input checked="" type="checkbox"/>	319459999	Adams, Ava R	05/02/2010	2 Second Street	Worcester	Worcester	(617) 666-777
	Consumer	<input checked="" type="checkbox"/>	417347777	Baker, Elroy R	05/01/2010	4 Fourth Street	Worcester	Worcester	(617) 666-666
	Consumer	<input checked="" type="checkbox"/>	1357535114	Eastport, John	09/20/2010	123Main St	Beaver Falls	Beaver	(802) 888-828
	Consumer	<input checked="" type="checkbox"/>	1031464321	Harmony, Jack	12/29/2011	123 Sunset Hills Drive	Abbottstown	Adams	(617) 321-123
	Consumer	<input checked="" type="checkbox"/>	525373333	Harmony, John	05/01/2010	5 Fifth Street	Worcester	Worcester	(617) 343-334

14 Consumers

If the record isn't in your list view, you can locate it by using the search feature and single clicking it in the search results.

By default, only fields that contain data are displayed when an existing consumer record is opened, which minimizes the amount of scrolling that needs to be done to view the record.

Basic Information	
Name	Jay Abernathy
Date Registered	03/24/2011
Consumer Details Last Reviewed	03/24/2011
Gender	Male
Age	74
DOB	01/04/1939
SSN	123-56-8977
Information Release Authorized	No
Default Agency	Beaver County Office on Aging
Active	Yes
Status Date	03/24/2011
NAPIS	
Ethnicity	Not Hispanic or Latino
In Poverty?	Don't Know
Lives Alone?	Don't Know
High Nutritional Risk?	Yes
Is Rural?	No
NSIP Meal Eligible	Yes
NSIP Eligibility Type	Age (60 or Over)
Is Ethnic Race specified	Yes
Insurance	

### Adding or Editing Items on the Left Side of the Details Screen

On the left side of the screen, the remaining fields can be revealed by clicking [Open](#).

Basic Information	
Name	James M Abernathy
Date Registered	04/13/2010
Consumer Details Last Reviewed	05/21/2010

When those fields are revealed, you'll be able to edit the information in that section of the record, as long as your login has the necessary permissions.

OK

Prefix

First Name James

MI M

Last Name Abernathy

Suffix

Maiden Name

A.K.A Name

Date Registered 4/13/2010

Consumer Details Last Reviewed 5/21/2010

Marital Status Married

Gender  Unknown  Female  Male

DOB 4/13/1944

Editing items in this section can be done using the same methods as you would use with editing a new record, as previously shown. When you've completed your entries, click **OK**  restore the collapsed view.

OK

Prefix

First Name James

MI M

Last Name Abernathy

### Adding or Editing Items in Panels

To view or edit the content in the panels on the right side of the screen, click on an item in the panel, then click the **Open**  button. A window will open that displays detailed information.

Care Recipients Add New | Open | Delete |

<p> Harmony, John J ( 525373333 ) Elder Services of Worcester Ar (617) 343-3343 4/13/2010 - (Unspecified) [ Federal ] Brother</p>	<p> </p>
---	----------

With the new screen will open you can make any needed edits. When you're done, click **OK**  to save your changes. You can also close the panel without saving any changes by clicking Cancel  or the red .

**Consumer - Abernathy, Jay (413445468)**

Details | Activities & Referrals | Journals | Service Deliveries | Service Orders | Service Plans

Care Recipient - Harmony, John J X

OK | Cancel

Click to close without saving.

Relationship: Brother

Care Recipient: Harmony, John J

Recipient Client ID: 525373333

Recipient Agency: Elder Services of Worcester Area

Start Date: 4/13/2010

End Date:

Primary?

Family Caregiver Program Type: Federal

At Risk for Abuse or Neglect:  No  Yes  Don't Know

Click to save changes

If you'd like to add a new item to a panel, click **Add New** [Add New](#).

**Care Recipients** Add New | Open | Delete |

Harmony, John J ( 525373333 ) Elder Services of Worcester Area

(617) 343-3343

4/13/2010 - (Unspecified) [ Federal ] Brother

A window will open, where you can enter the information about the new item. When you're done, click OK [OK](#) to save it and add it to the panel.

**Consumer - Abernathy, Jay (1311708545)**

Details | Activities & Referrals | Assessments | Calls | Care Plans | File Attachments | Journals | Service Deliveries | Service Orders

Care Recipient - Jones, Elizabeth X

OK | Cancel | Reject Changes | Open Audits |

Relationship: Non-Relative

Care Recipient: Jones, Elizabeth

Care Recipient Client ID: 212261314

Care Recipient Agency: Beaver County Office on Aging

Start Date: 3/24/2011

End Date:

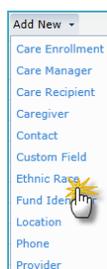
Primary?

Family Caregiver Program Type: Federal

At Risk for Abuse or Neglect:  No  Yes  Don't Know

## Adding a New Panel

To add a new panel to the Consumer Details screen, click **Add New** [Add New](#) in the Consumer Details toolbar, then select the new panel from the dropdown list.



The new panel will open, where you can enter the necessary information.

When you've completed your entries, click **OK**  save the new panel and add it to the Consumer Details screen.

### Linking Caregiver and Care Recipient Records

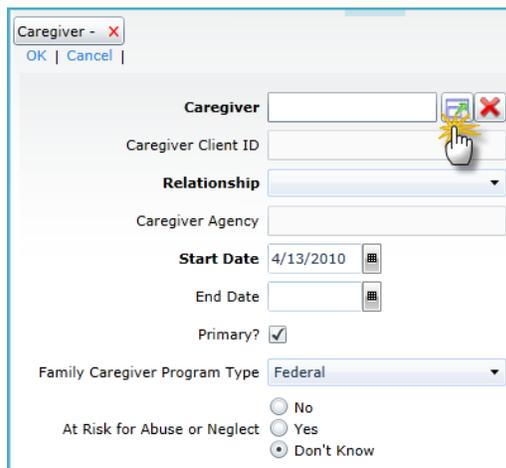
To ensure NAPIS reporting compliance, Caregivers and their Care Recipients must be "linked" in SAMS I&R before Family Caregiver services can be correctly recorded. Caregivers and Care Recipients must exist or be created as *Consumers* before the linkage can be established.

*To link a Care Recipient to a Caregiver:*

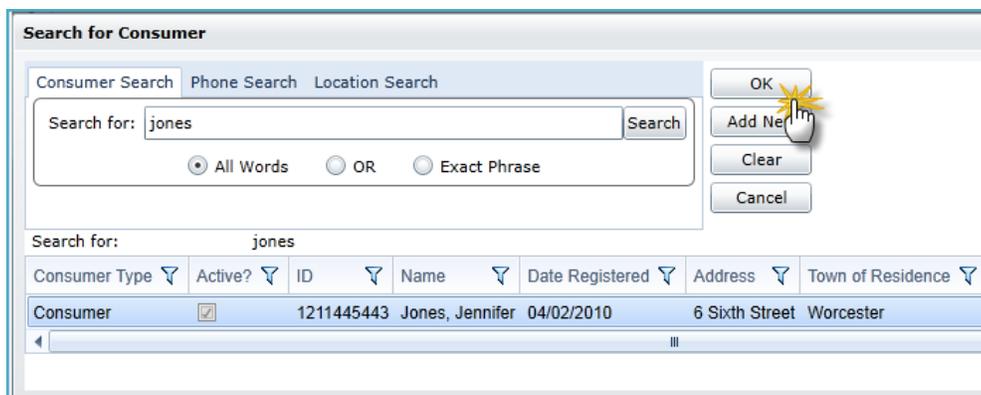
1. Open the Consumer Record of the Care Recipient.
2. In the Consumer Details screen, click **Add New**, then click **Caregiver**.



3. Click the search  button next to the Caregiver field.



4. Search for the Caregiver. The results will display on the lower half of the search dialog. Highlight the desired consumer then click **OK**.



**NOTE**

If the Caregiver Record is not found, click the **Add New** button on this screen to create the Caregiver as a new Consumer.

5. Set the **Relationship**, **Start Date**, **Family Caregiver Program Type** and **At Risk for Abuse** fields as appropriate. Note that the start date must precede the delivery date of any Family Caregiver services.

6. Click **OK** to completed the process and return to the consumer record.

**TIP**

The same process can be completed from the Caregiver record by selecting *Care Recipient* from the Add New dropdown.

## Recording an Individual Service Delivery from the Consumer Record

*To add or edit a single Service Delivery in a Consumer Record:*

1. Click the **Add New** Add New button in the Service Delivery tool bar. Or if you're editing an existing delivery highlight the record and click the **Open** button.
2. Select the Delivery Type. By default, this is set to Standard. If the delivery is to a Caregiver or Care Recipient, click the appropriate radio button.

<input checked="" type="radio"/> Standard <input type="radio"/> to Caregiver <input type="radio"/> to Care Recipient
--

- Complete the mandatory *Care Enrollment*, *Agency*, *Provider*, *Service*, *Units* and *Unit Price* fields.

Consumer - Abernathy, Jay (1377712157)

Service Delivery - Home Delivered Meals, 4 Units

Save | Save and Close | Close | Add Next | Print | Open Audits |

Delivery Type:  Standard  
 to Caregiver  
 to Care Recipient

**Care Enrollment**: NAPIS - Title III - 03/14/2011 - (No End Date) (Active)

**Agency**: Beaver County Office on Aging

**Provider**: Economy Meals on Wheels

Service Category: Home Delivered Meals

**Service**: Home Delivered Meals

Subservice: [Dropdown]

Fund Identifier: [Dropdown]

Service Month/Year: 3/2011

**Units**: 4.00

**Unit Price**: \$5.00

Total Cost: \$20.00

Specify units by day in the calendar below:

March, 2011						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13		15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Individual days of service: 24, 25



### TIP

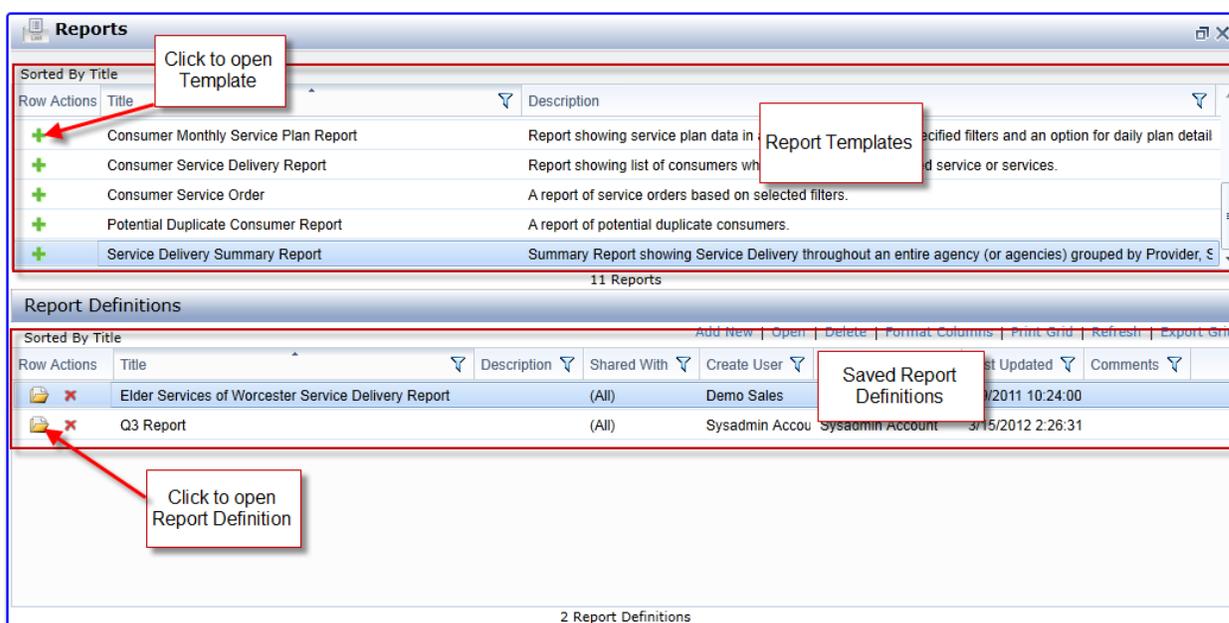
The required fields in the Service Delivery screen appear in a **bold** font.

- Complete any optional fields that may be needed such as **Subservice** or **Fund Identifier**.
- To enter individual days of service, click the dates in the calendar to the right and enter the number of units. You may select multiple dates to enter the same number of units at once.
- Click Save and Close **Save and Close** to add the service delivery to the record and return to the List Screen.

## SAMS I&R Reports

Now that we have seen multiple methods for entering data into SAMS I&R, let's take a look at how we can get the data out of SAMS I&R through the use of Reports.

The Reports section can be accessed by clicking on the **Reports** Reports button in the main toolbar.



In the upper portion of the screen, SAMS I&R displays the *Report Templates* that are available, along with the *Report Type* and a *Description*. Report templates form the baseline for new reports. Each template contains various available selections for grouping and sorting outputs, data fields to display, and robust options for filtering results. Although each report template is unique in the output and purpose, the methodology for creating saved reports is consistent. A Report Template can be opened by double clicking or clicking on the green + sign.

The lower portion of the center area of the screen contains saved *Report Definitions*. Report definitions represent existing reports that were previously created from a report template. A Report Definition can be opened by double clicking or clicking on the Edit 📁 icon.

## Report Navigation

When you open a Report Template in SAMS I&R, you'll see icons that are used to navigate through the filtering and display options. To effectively use the Reports section, you'll need to clearly understand how these various icons work:

-  - expand or collapse a section of the report template.
-  - open a filter or display field for editing.
-  - delete an item.

## IR Reports Overview

**SAMS Agency Call Report** – A summary table outlines the number of calls received by caller type and displays totals for call counts and minutes per month. Filtering options are available to limit the resulting data.

- **When to use:** *You want to see a breakdown for what types of callers are tracked for I&R meeting a certain criteria such as displaying the call totals received from a provider over a specific date range.*

**SAMS Call Follow-up Report** – A listing of consumers displays the follow-up activities that have been created in call sessions. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- **When to use:** *You want to see a list of all follow-up activities that are open from the call sessions based on certain criteria such as a case manager that wants to see any activities that need more information sent to the consumer being the user entering the call (agent), and filter to only show a specific date range.*

**SAMS Call Mailing Label Report** – A listing of 3 X 10 Avery 5160 labels for consumer and/or caller address details as entered in call sessions. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- **When to use:** *You want to generate mailing labels for clients and/or callers that were entered in call sessions such as creating labels for follow-up mailings.*

**SAMS Call Profiler Report** – A listing of call session counts based on the grouping selection. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- **When to use:** *This simple but powerful report allows you to profile the number of calls received by a variety of groupings such as the types of calls, the agent entering the calls, the location of the callers, and more.*

**SAMS Call Referral Report** – A basic cross-tab displays call session counts based on the row and column selections. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- **When to use:** *You want to see the number of calls received in a cross-tab including selections such as the providers or services referred, consumers, or the agents entering the calls.*

**SAMS Call Summary Report** – A detailed summary report for each call session entered based on the criteria selected. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- **When to use:** *You want a detailed synopsis of the calls that have been entered based on a certain criteria such as calls entered by a particular agent in a specific date range.*

**SAMS Call Topic Report** – A listing of topics tracked for each call session. Filtering options are available to limit the resulting data based on attributes of the call sessions.

- **When to use:** *You want a list of topics for the calls that have been entered based on a certain criteria such as calls entered with specific topics.*

**SAMS I&R Program Report** – A detailed summary report for each I&R provider entered in the SAMS Administrator setup. Filtering options are available to limit the resulting data based on attributes of the providers.

**When to use:** *You want to create a detailed directory listing f*

## Running a New Report

1. Open a Report Template form the upper portion of the screen by double clicking or clicking the green  sign.

Row Actions	Title	Description
+	Consumer Monthly Service Plan Report	Report showing service plan data in a columnar output with specified filters and an option for daily plan detail
+	Consumer Service Delivery Report	Report showing list of consumers who have received a specified service or services.
+	Consumer Service Order	A report of service orders based on selected filters.
+	Potential Duplicate Consumer Report	A report of potential duplicate consumers.
+	Service Delivery Summary Report	Summary Report showing Service Delivery throughout an entire agency (or agencies) grouped by Provider, S

11 Reports

2. Enter a **Report Title** if the report is to be saved for future use.

<b>Title</b>	Provider Direct Test
<b>Subtitle</b>	
<b>Description</b>	Summary of Service Deliveries

3. Optional **Comments** and **Description** can also be added, if needed.
4. In the **Report Security** section, select the appropriate option for who will be allowed access to the saved report in the **Shared With** field. Available options are as follows:

(All)
(None)
Agency
Provider
State Unit

- *(All)* – Allows all users of SAMS to have access to the saved report.
- *(User)* – Allows only the create user to have access to the saved report.
- *Agency* – Allows any users of SAMS associated to the same Agency as the create user to have access to the saved report.
- *Provider* – Allows any users of SAMS associated to the same Provider as the create user to have access to the saved report.
- *State Unit* – Allows any users of SAMS associated to the same State Unit as the create user to have access to the saved report.

5. Select the appropriate option for what changes can be made to the saved report in the **Modifications Allowed** field. Available options are as follows:

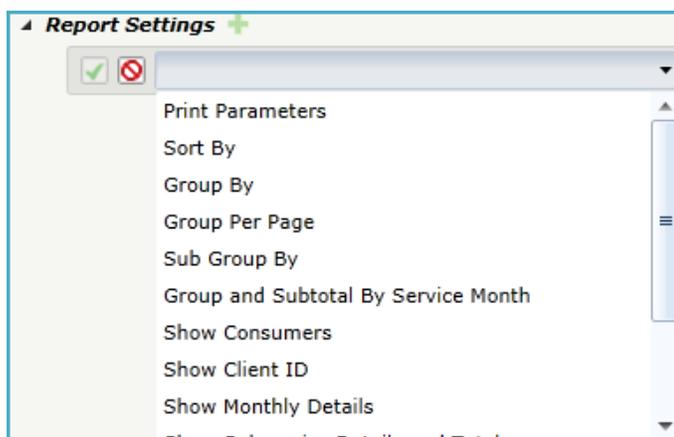


- *(All)* – Any user with access to the saved report can change any options or settings.
- *(None)* – Only the create user has ability to change the saved report options and settings.
- *Date Fields Only* – Any user with access to the saved report can only change date fields, such as service start date and end date.

## Filtering and Display Options

SAMS Case Management Reports contain a wide variety of Filtering and Display Options. While there is some variation in these options from one report to another, the functionality is consistent. The filters that are applied to the report template will determine what data will display in the report. When filters are applied, SAMS Case Management will look throughout the database for data that meet the criteria specified. As a general rule, when fewer filters are applied, greater amounts of data will be returned. SAMS Case Management offers reporting capability in several categories, but the filtering methods are similar in all of them. To determine how you want the data to appear in your report, use the following steps:

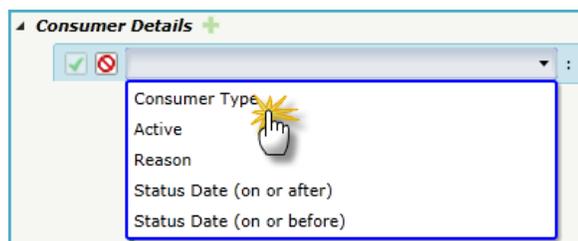
5. Set the appropriate options and selections for grouping, sorting, and the options for what data to include in the *Report Settings* section.



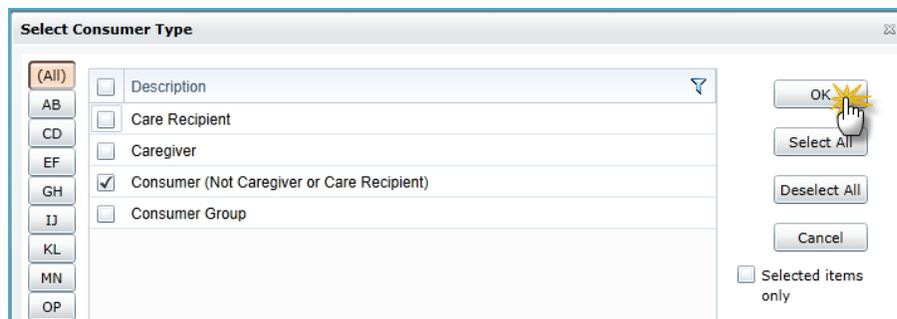
6. Open one Filter Categories by clicking the green + sign.



7. Select a filter type from the dropdown list.



8. Depending upon the filter type that you select, another dropdown or a pop up screen will appear where you'll select the filter. If the filter is in a pop up screen, click the **OK** button to apply it to the Report.



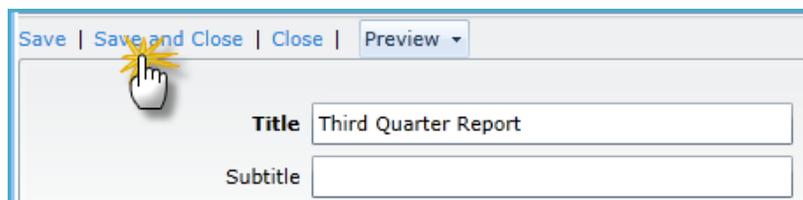
9. If the filter was selected from a dropdown list, click the green checkmark  to apply it.



10. Continue applying filters to the report until you'd like to view the output. Click the Preview **Preview** button to view the output in the default PDF format. To view the output in another format click the dropdown arrow to select from the available options.



11. The output can then be printed by following the instructions for the format that was selected.
12. To save the Report for future use and return to main Report screen, Click **Save and Close** **Save and Close**



13. Or click **Close** **Close** to close without saving.

For information about using *Reports*, see the SAMS User's Guide or Help files.