

State of Alaska
Department of Health and Social Services
Senior and Disabilities Services - Grants Unit

SDS GRANTS SAMS DATA ENTRY MANUAL



January, 2015

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Welcome!

This is the data entry training manual for SDS grants using the Harmony for Aging Social Assistance Management Software (SAMS) for entry of service delivery provided to consumers of SDS grant services.

Most SDS grant programs use the same database which allows one record per consumer for all grant services they receive from various grant providers in State.

The program manager of the grant is your “go to person” for training and assistance with SAMS. If you have any questions, please call or email them

Let's get started!

SECTION I

Requesting Usernames and Passwords

1. Each grant program is allotted one user per grant. Contact the program manager for your grant program for a copy of the most current **SAMS Security Agreement** form to submit for usernames and passwords to access SAMS.
2. The program manager will submit the form to the necessary individuals to set up your user accounts.

Harmony Computer Configuration and Microsoft Silverlight Plug-In Requirements

- **All users must refer to APPENDIX A for required set-up configurations to access the Harmony for Aging Portal and SAMS Database for correct functionality.**
- **Harmony currently only supports Internet Explorer as the web browser for accessing the Harmony for Aging and SAMS Suite. Other browsers may be used and may work, but at times difficulties may be experienced and Harmony is not able to assist users with those difficulties when not using Internet Explorer (IE).**

SECTION II

Accessing the Harmony Portal

Once you have received two sets of usernames and passwords and the URL you will be able to log in and use the HFA Portal and HFA SAMS 3.0 database application.

1. **Open the Internet Explorer browser and enter the URL address**
<https://login.harmonyis.net>
2. It is suggested that you create a short-cut for your desktop (**SEE APPENDIX A**)
3. Enter your Harmony Portal login which begins with “**ak__**”.

Note 1: The temporary password for this username is required to be changed upon the first login. You will also be asked a set of security questions to be used for future password resets. There is also an option on the login page if you’ve forgotten your password and need to reset.

Note 2: Approximately **every 40 days** you will be **prompted to reset** your HFA Portal password – which is the username that begins with “ak”. You will never be prompted to change the second (SAMS Application) password.

HFA Portal & SAMS Log-In

If you see the following screen you have successfully logged on to the Main Portal Page.

There are application links, tools for training and messages for upcoming events, etc. see arrows and notes below.

HFA Main Portal Page

The screenshot shows the HFA Main Portal Page with several annotations:

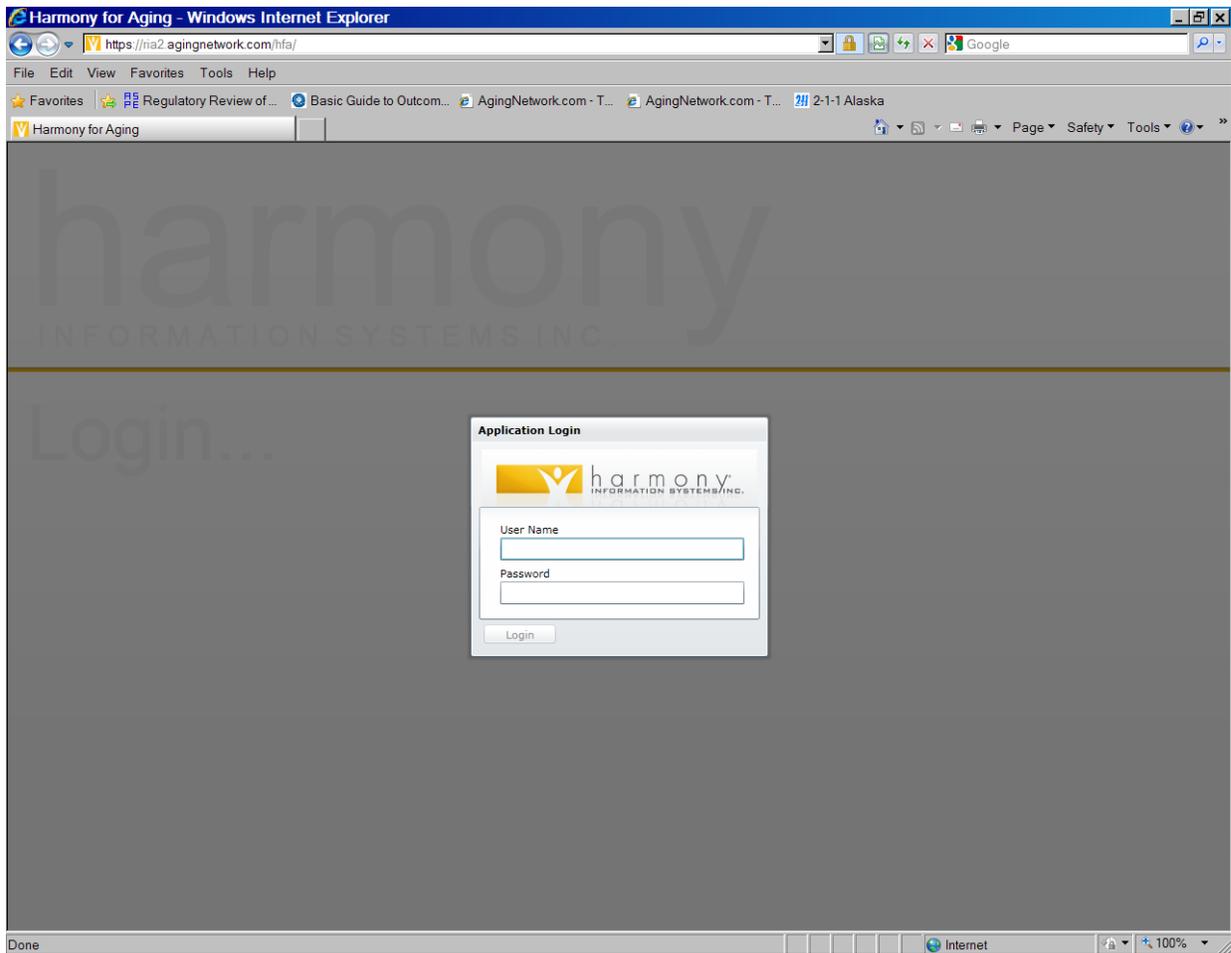
- To log out:** A red arrow points to the user name 'csugar@agingnetwork.com' in the top right corner.
- Click on SAMS 3 Case Management login.** An arrow points to the 'SAMS 3' link in the 'Application Links' section.
- Click here to change your Portal password** An arrow points to the 'My Configuration' link in the top right.
- Scroll this list to find training tutorials.** An arrow points to the 'Harmony Quick Links' section.
- SAMS 3 User Guide. BEWARE of printing this guide it is 300+ pages. Also, it is not grant program specific.** An arrow points to the 'SAMS 3 User Guide' link in the 'Application Support Resources' section.

Suggested Tutorials:

- Part A: My Settings, Consumer List, Consumer Records,
- Part B: Service Deliveries, Roster Definitions, Service Deliveries with Rosters,
- Part C: Reports

To login to the SAMS Database Application:

1. Click on **SAMS 3** – under Application Links for the application login window.
2. When you receive the **SAMS Case Management Application Login window**
 - a) Enter the second username here - it begins with your first or last initial
 - b) Enter the password
 - c) Click Login



SAMS Main Navigation page:

The screenshot shows the SAMS Case Management interface. At the top left, there is a search bar with a magnifying glass icon and the text "Search...". A callout bubble points to this search bar with the text: "Global Search to search for a client name in the SDS Alaska Grant Database." Below the search bar is a "Recently Opened" section. A callout bubble points to this section with the text: "This area shows consumer records recently reviewed." Below this section is a small blue icon. A callout bubble points to this icon with the text: "This icon – opens and closes the pane." In the center of the page, there is a navigation bar with the following items: "My Dashboard", "Consumers", "Rosters", "Reports", and "More". A callout bubble points to this navigation bar with the text: "Navigation Bar for database functions." On the right side of the page, there is a user profile section with the text "iddtraining" and "AK_STATE 1.4.56541". A callout bubble points to this section with the text: "Choose 'My Settings' from the drop down and set colors, fonts, and sets some defaults."

Setting “My Settings” Defaults & Preferences

Open “My Settings” from the drop down by your user name (top right) and set the following defaults: **Rows per Page**, **Provider**, and **Care Program**. You may also wish to set the state, area code, text and line color. Click “Save and Close” when done.

The screenshot shows the 'My Settings' application window. The title bar includes 'Advanced', 'My Settings', and 'Switch To...'. The main content is divided into two sections: 'Grid Settings' and 'Default Settings'.

Grid Settings:

- Font: Calibri, 14
- Font Color: [Color Picker]
- Row Background Color: [Color Picker]
- Alternate Row Background Color: [Color Picker]
- Caregiver Font Color: [Color Picker]
- Roster HighLight Color: [Color Picker]
- Rows per Page: 100

Default Settings:

- Agency: SDS Grants
- Provider: [Color Picker]
- Care Manager: [Color Picker]
- Care Program: (1 Item) [Color Picker]
- State: AK
- County: [Color Picker]
- Area Code: 907
- Service Delivery Month: Use Current Month
- Info Release Authorized: No
- Module: Consumers
- Enable Roster Automatic Save: No
- Roster Automatic Save Interval (Min): 15

Table:

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

SECTION III

Consumer List Screen

1) Click on the tab labeled “Consumers”

Consumer List Screen

The screenshot shows the 'Consumer List Screen' in a web browser. The browser title is 'Harmony for Aging - Windows Internet Explorer'. The URL is 'http://www.agingnetwork.com/hfa/'. The page has a navigation menu with 'My Dashboard', 'Consumers', 'Routes', 'Rosters', 'Reports', and 'More'. The 'Consumers' tab is selected. The main content area shows a table of consumer records. The table has columns: Consumer Type, ID, Name, Active?, Address, Town of Residence, Home Phone, Provider, Gender, and Age. The table is sorted by Name. There are several callouts explaining features:

- This ribbon indicates which screen is showing.** (Points to the 'Consumers' tab in the navigation menu)
- Consumer Type allows you to switch between types of consumer lists, i.e. Consumers, Consumer Groups, Caregivers, etc.** (Points to the 'Consumer Type' dropdown menu)
- This indicates how the list is currently sorted.** (Points to the 'Sorted By Name' text)
- The filter icon filters what is showing. Any column with a filter may be filtered. Using the filter for “Name” is a quick way to find a client record on your list.**
 - **When the filter is dark in color – that column has a filter set.**
 - **Filters remain set until cleared by the user.**
- Click on format columns to select the columns you wish to see on your screen.** (Points to the 'Format Columns' link)
- Names in italics = record has been made inactive record.** (Points to the record for 'Testing, Newmike')

Consumer Type	ID	Name	Active?	Address	Town of Residence	Home Phone	Provider	Gender	Age
Consumer	1330151003	Demo, Jane	<input checked="" type="checkbox"/>		Juneau	(907) 790-5555	State of Alaska	Female	62
Consumer	1384943133	Demo, Martha	<input type="checkbox"/>		Juneau				
Consumer Group	1348696082	Gone, Z	<input type="checkbox"/>			(907) 123-4567			
Consumer	101335555	J, State	<input type="checkbox"/>						
Consumer	1363084047	Smith, S	<input type="checkbox"/>				State of Alaska	Female	71
Consumer Group		SoA SH	<input type="checkbox"/>				State of Alaska	Unknown	
Consumer Group		State C	<input type="checkbox"/>				State of Alaska	Unknown	
Consumer Group		State C	<input type="checkbox"/>				State of Alaska	Unknown	
Consumer	206354321	State Jr	<input type="checkbox"/>			(907) 123-4567	State of Alaska	Male	77
Consumer Group		State of A	<input type="checkbox"/>				State of Alaska	Unknown	
Consumer	501461234	State1, State1	<input checked="" type="checkbox"/>	1220 Glacier	Juneau	(907) 321-4567	State of Alaska	Female	66
Consumer	101300898	State2, State2	<input checked="" type="checkbox"/>	1001 Main Street	Juneau		State of Alaska	Unknown	82
Consumer	1358532351	State25, State25	<input checked="" type="checkbox"/>	Smith Avenue	Juneau		State of Alaska	Unknown	
Consumer	1383034914	State3, State3	<input checked="" type="checkbox"/>	800 Glacier Avenue	Juneau		State of Alaska	Male	71
Consumer	101344444	State4, State4	<input checked="" type="checkbox"/>	100 Seward Street	Juneau		State of Alaska	Female	78
Consumer	101346666	State6, State6	<input checked="" type="checkbox"/>	300 Seqard	Juneau		Alaska Community Sen	Female	78
Consumer	101307777	State7, State7	<input checked="" type="checkbox"/>	500 Seqard	Juneau		State of Alaska	Male	82
Consumer	1308913546	Sugar, Susie	<input checked="" type="checkbox"/>				State of Alaska	Unknown	
Consumer	1338079470	Test, Cyndee	<input checked="" type="checkbox"/>				State of Alaska	Unknown	
Consumer	1392931329	Test, Cyndee	<input checked="" type="checkbox"/>	#25 Blueberry Housing	Juneau		State of Alaska	Female	72
Consumer	1360141998	Test, Ida	<input checked="" type="checkbox"/>	123 Smith Street	Hoonah	(907) 555-7800	State of Alaska	Female	77
Consumer	1376464479	Test, Test	<input type="checkbox"/>					Female	72
Consumer	1001355643	Test, William	<input type="checkbox"/>				Bristol Bay Native Asso	Male	76
Consumer	1331348383	Test99, Joan	<input type="checkbox"/>			(907) 465-4876	State of Alaska	Female	65
Consumer	920454681	Testing, Newmike	<input type="checkbox"/>	1012 Taylor Street	Juneau	(907) 465-8279	Alaska Island Commun	Male	66
Consumer	1328612917	Testine23, Testine	<input checked="" type="checkbox"/>	2121	Juneau		State of Alaska	Male	69

Consumer Details Screen

For the **REQUIRED DATA ELEMENTS & CHARACTERISTICS** to enter for your program – See the **SAMS CONSUMER REGISTRATION** and **CHARACTERISTICS** forms – **Appendix B**

Special Note: This information is to be updated on an annual basis for all current clients.

- 1) If the left-side of the screen is not already open to allow editing, click on “open.”
- 2) When finished click on “OK” to close and then click “Save.”

Note: There may be more sections or fields on this screen shot than you may see on your screen depending upon the program you are entering data for. THIS MAY BE CUSTOMIZED TO YOUR SCREEN.

Consumer Name **SAMS ID #**

Click “Open” to change items on left-hand side of screen. Click ‘OK’ to accept.

Use the “Add-new” drop-down on this ribbon to add fields on right-hand side of screen.

Use the “Add-new” within the field box, that is blue, to add item(s) to the field.

Yellow file folder to opens the item for editing.

Consumer - Demo, Laurie (1375780493)
 1111 Juneau Way Juneau, AK 99801 1/1/2009 Age: 4
 P: (907) 555-5555
 Notes: (consumer doe...)

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

Basic Information Open

Name	Laurie Demo
Date Registered	04/05/2013
Consumer Details Last Reviewed	04/05/2013
DOB	01/01/2009
Information Release Authorized	No
Active	Yes
Status Date	04/05/2013
Age	4

Insurance

Other Characteristics

Employment Status	Unknown
Receiving Social Security	No
Understands English	Yes
Primary Language	English

Consumer Diagnosis Category

ADRD	Don't Know
Autism	Yes
Cerebral Palsy	Don't Know
Cognitive Impairment	Don't Know
FASD	Don't Know
IDD	Don't Know
Mental Illness	Don't Know
Physically Frail	Don't Know
Seizure Disorder	Don't Know
Traumatic/Acquired Brain Injury	Don't Know

Guardianship Type

IDD Eligibility Information

IDD DSDS #	111111111
IDD Eligibility	
IDD Eligibility Expiration	
IDD Reassessment Date	
Medicaid Enrollment	Don't Know

Medicaid

Medicaid Prog. Admission Date

NAPIS

Is Rural?	Yes
Lives in Assisted Living	Don't Know
Lives w/<60 Caregiver	Don't Know

Care Enrollments Add New | Open

Community Developmental Disabilities Grant	04/05/2013 - (Not Specified)
--------------------------------------------	------------------------------

Custom Fields Add New | Open

Autism:	Yes
IDD DSDS #:	111111111

Directions To Home Add New

Ethnic Races Add New | Open

Native Hawaiian/Other Pacific Islander

Locations Add New | Open | Copy

Residence: 1111 Juneau Way Juneau, AK 99801
Alaska (Counties) County

Notes Add New

Phones Add New | Open

Home	(907) 555-5555
------	----------------

Providers Add New | Open

State of Alaska	04/05/2013 - (Not Specified)
-----------------	------------------------------

Searching for a Consumer in SAMS

ALWAYS SEARCH THE DATA BASE FIRST before creating a new consumer!

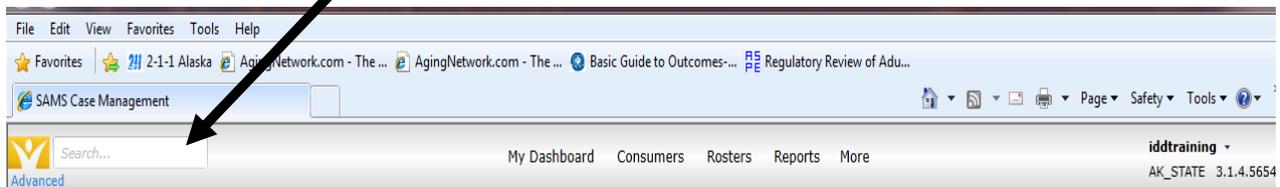
To avoid creating a DUPLICATE record, ALWAYS SEARCH FIRST!

The database is shared with all grant programs STATEWIDE and many individuals have already been entered for other grant services.

- **Do not assume** that the consumer you just began serving is brand new to the database.
- **Accidentally created a duplicate record?** No problem. Please fax, call or send via DSM, the information to the Program Manager so that a Merge may be completed.
- **Users have the ability to edit**, but only a SAMS Administrators has the ability to delete an item. Please fax, phone or send via DSM the consumer information that needs to be deleted.
- **NEVER E-MAIL CONSUMER NAMES** through regular email - it is not secure. Use either, call, fax or DSM to send consumer his information to be deleted
- **National Family Caregiver Support Program** records must be merged by an SAMS Administrator – please contact the program manager of your program for a merge that may have caregiver services linked to it.

1. **THREE ways to search** for an individual

- a) **Scrolling through** your list and pages to see if they are already being served by another grant program within your agency (takes a long time),
- b) **Click on the filter icon** at heading of column for Name and type in the last name (quick), or
- c) Use the **Global Search box** - type their last name, first name or date of birth (quick).



- d) **Names are spelled many ways**, if the person you are searching for does not show up, try only the last name or fewer letters in the first name to account for misspellings. **Advanced Search** is also an option.

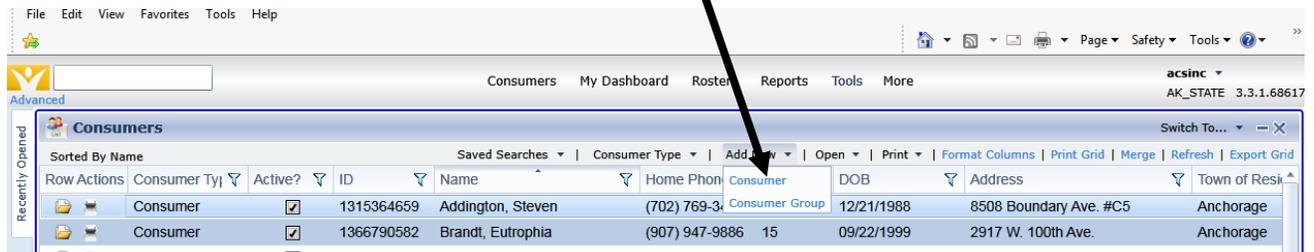
2. If the individual **WAS** found in the search – continue with this section.
3. If the individual **WAS NOT** found in the search skip to “Registering a Brand New Consumer.”

4. **When the individual is found in the Search**
 - a) **Choose** their name from the list by double clicking or click on “open.”
 - b) Your screen opens to their **Details (note the Details tab highlighted blue on the menu ribbon).**
 - c) **Use the SAMS Consumer Registration and Characteristics** form to enter and/or update the **required** data elements for the consumer.
 - d) **See item 9 in the next section** to continue with for further steps on entering required items.
 - e) **Save when finished.**

SECTION IV

Registering a New Consumer & Entering Characteristics

1. **BEFORE entering a new consumer, REMEMBER to always SEARCH FIRST!**
2. **Use the SAMS Consumer Registration and Consumer Characteristics** form for your program as your guide to enter the following information. See Appendix B.
3. From the consumer list screen, **Click on “add new”** on the menu ribbon, and Choose **Consumer** from the drop down



5. The following window will open
6. Enter the highlighted items and then click OK.
7. Change the Date Registered – see text box:

ALERT: Date registered **must** be changed to the month you began serving. If there is ever a date that is older – always leave it.

The screenshot shows the 'Add Consumer' form with several sections: Basic Information, Care Providers, Addresses, and Care Enrollments. The 'Date Registered' field is highlighted in red, and an arrow points to it from the alert box.

Basic Information

First Name: [] MI: [] Last Name: [] Date Registered: [] Gender: [] Unknown [] Female [] Male [] DOB: []

Care Providers

Default Provider: [] State of Alaska

Addresses

Home Address: [] Address 1: [] Address 2: [] County: []

Town: [] State: [] Zip Code: [] Municipality: []

Country: [] United States

Care Enrollments

HCB Senior In-Home Services
Active
State of Alaska
10/24/2014 - (Not Specified)

OK Add Next Cancel

8. Click OK when done.
9. This screen will open - the **Consumer Details Screen** and with the information you just entered.
10. Enter additional information from the Consumer Characteristics forms as required for your program.

11. When finished on the **Left side - Click "OK"** to close the section.
12. **The right side of screen contains other fields**, each in their own box, that need to be populated as well. The fields required are specific to each grant program. **See the SAMS Consumer Registration and Characteristics form** for the program. Contact the grant program manager as well for more information.
13. The **following fields marked** are the most common required:

o, Laurie (1375780493)
AK 99801 1/1/2009 Age: 4

have any notes)

Details Service Deliveries

ose | Reject Changes | Print | Status Wizard | Merge | Add New

Open

Laurie Demo
04/05/2013
viewed 04/05/2013
01/01/2009
rized No
Yes
04/05/2013
4

Unknown
No
Yes
English

Category
Don't Know
Yes
Don't Know
Don't Know

Information
1111111111

iration
t Date
nt Don't Know

Care Enrollments Add New | Open |

Community Developmental Disabilities Grant 04/05/2013 - (Not Specified)
Active

Custom Fields Add New | Open |

Autism: Yes
IDD DSIDS #: 111111111

Directions To Home ABC

Ethnic Races Add New | Open |

Native Hawaiian/Other Pacific Islander

Locations Add New | Open | Copy |

Residence: 1111 Juneau Way Juneau, AK 99801
Alaska (Counties) County

Notes ABC

Phones Add New | Open |

Home (907) 555-5555

Providers Add New | Open |

State of Alaska 04/05/2013 - (Not Specified)

14. To enter items on the **Right side of the screen in these Field boxes**, click **Add New**, or
15. If the item requires editing only – use the yellow file folder to open and edit the item.
16. If an item or date needs to be removed (deleted) contact the grant program manager.
17. **To find the Care Enrollment for your grant program – see the next page.**
18. When all required items have been entered Save and Close the consumer's record.
19. The consumer now appears on your Consumer List.
20. If the consumer does not show, click on Refresh.
21. You are now ready to enter the next consumer.
22. REMEMBER to SEARCH First!

Care Enrollments for SDS Grant Programs

Grant Program	Level of Care	Care Enrollment/Service Program
Adult Day Services (ADS)	Senior Home and Community Based Grants	HCB Adult Day Services
Behavioral Risk Management	Behavioral Risk Management	Behavioral Risk Management
Community Developmental Disabilities Grant (CDDG)	Intellectual and Developmental Disabilities Grants	Community Developmental Disabilities Grant
Deaf Navigator Program	Deaf Navigator Program	Deaf Navigator Program
National Family Caregiver Support Services (NFCSP)	Federal Administration on Aging Programs	Family Caregiver Support Program- Title IIIe
Nutrition, Transportation, & Support Services (NTS)	Federal Administration on Aging Programs	NAPIS – Title III
Senior In-Home Services (SIH)	Senior Home and Community Based Grants	HCB Senior In-Home Services
Short Term Assistance and Referral (STAR)	Intellectual and Developmental Disabilities Grants	Short Term Assistance and referral
TABI Mini Grants	Traumatic or Acquired Brain Injury Grants	TABI Mini Grants

Duplicate Records?

Duplicate Record? If you see or have created a duplicate client record:

- You can either perform a merge or
- Contact the program manager by phone, fax, or secure/encrypted email with the information so that they can assist.

Always send consumer information via FAX, DSM or phone to the program manager.

Never send consumer information via **regular** email – it is not secure nor HIPAA compliant.

SECTION V

Entering Service Deliveries for Registered Consumers

1. **Open the consumer's record** you wish to enter service deliveries for
2. **Click on the "Service Deliveries" tab** from the menu ribbon. This will open the permanent list of service deliveries for the consumer. This screen will be blank for brand new consumers.
3. **Click on "Add New"** to open a blank service delivery record.

The screenshot displays the Harmony Information Systems Inc. web application interface. At the top, there is a search bar and an 'Advanced' search option. Below the search bar, there are navigation tabs: 'My Dashboard', 'Consumers', 'Routes', 'Rosters', and 'Reports'. The 'Consumers' tab is selected, and the user is viewing the record for 'Consumer - Test, Cyndee (1392931329)'. The 'Service Deliveries' tab is active, showing a table of service delivery records. The table is sorted by 'Service' and includes columns for 'Row Actions', 'Care Enrollment', 'Service', 'Agency', 'Provider', 'Type', 'Total Units', and 'Service Month/Year'. A single record is visible, showing 'HCB Adult Day Servi' for 'HCB Adult C' at 'Senior Grant' in 'State of Alas' for 'Hours' with '58.00' units in 'January, 2010'. A black arrow points to the 'Add New' link in the top right corner of the table area.

Row Actions	Care Enrollment	Service	Agency	Provider	Type	Total Units	Service Month/Year
	HCB Adult Day Servi	HCB Adult C	Senior Grant	State of Alas	Hours	58.00	January, 2010

4. You will now see a Service Delivery Record Screen:

Consumer - Demo, Martin (1316865057)
 1212 Trout Road Dot Lake, AK 99737
 P: (907) 555-5555
 Notes: Lives with parents

Details Assessments Journals Routes Service Deliveries

Service Delivery X

Save | Save and Close | Close | Add Next | Make a Copy | Print

Care Program [Dropdown]
 Agency SDS Grants
 Provider [Dropdown]
 Service Category [Dropdown]
 Service [Dropdown]
 Service Month/Year [Text]
 Units [Text]

Specify units by day in the calendar below:

November, 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Format Property List

Comments

5. The current month will always appear

- *Note about the calendar: You may either enter a lump sum of units for the month or the calendar maybe used as a way to enter daily units. The entries will add up and populate the unit box. Generally we do not use the calendar because it is easier to enter a lump sum of units for the month. It is your choice.*

6. Service deliveries are displayed by the month and there may only be one entry per month per service type (see the screen shot on the previous page).

7. This screen may look a little different than yours, because this screen shot has had the “Format Property List” set to not view items we do not need.

8. Format Property List – whenever you see this in SAMS, you can customize your view for the screen it appears on.

9. When you set the Format Property List, it will remain in effect until you change it.

10. Enter the following information for the service:

- Care Program
- Provider
- Service Category

- d) Service
- e) Service Month/Year
- f) Total Units

11. Comments may also be made in the box to the lower right, but are not required.
12. **Save and Close.** Always save and close each entry!!!!
13. Add another service by clicking on “Add New” again if you have more services to enter on the consumer.

SHORT CUT FOR ENTERING SERVICES – When there is an existing service to copy:

Open the client and go to their service delivery list:

- a. Open the **client record**
- b. Go to **Service Delivery**
- c. **Highlight and right click on a service** that you wish to copy to the next month,
- d. **Enter the correct month/year** in the pop up,
- e. The service delivery screen will be **automatically populated**, with the care enrollment, provider, service category, and service.
- f. Check to be sure the **correct month/year** is entered,
- g. Enter **total units**, and
- h. **Save and Close.**

SECTION VI

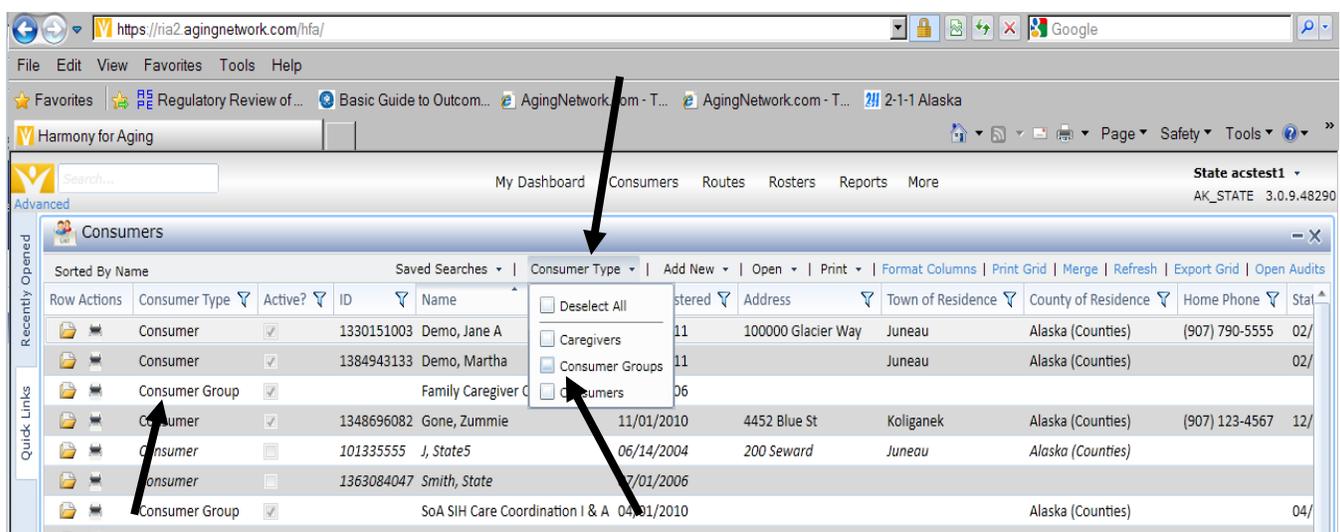
Consumer Groups & Entering Head-Counted Services

Consumer groups are used for entering unregistered services:

- head counts of Information, Referral, and Assistance (I, R, & A) for unregistered consumers and
- activities such as outreach and community education, which are recorded as headcounts.
-

To open an existing Consumer Group or to Search for one:

- a. Go to the Consumer List screen
- b. If you know the name of the consumer group, Search for it using the global search box
- c. You may also find it listed on the consumer list.
- d. If not, Click on **“Consumer Type”** in the page menu
- e. Check the box for **Consumer Groups**



- f. The screen will switch and show the Consumer Groups that have been set up. (screen shot above)
- g. A Consumer Group operates just like a consumer record with regard to data entry.
- h. Open the Consumer Group you wish to post data to.
- i. You will see the Basic information on the left and a care enrollment and provider listed on the right.
- j. Click on “Service Delivery”
- k. Click on “Add New” or highlight and copy a service.
- l. Be sure the month is correct

m. The items to enter in the service delivery window:

- ✓ Care Program
- ✓ Provider
- ✓ Service Category
- ✓ Services (be sure choosing correct services for a consumer group)
- ✓ Service Month/Year
- ✓ Units – contact units for the activity
- ✓ Consumers Served – enter #of headcount/participants
- ✓ Comments – list outreach and community activities by date for the month or items required for your grant program, etc.

n. Save and Close.

The screenshot shows the 'Harmony for Aging' web application in Internet Explorer. The main window is titled 'Consumer Group - Family Caregiver Outreach' and is in the 'Service Deliveries' tab. The interface includes a search bar, navigation menu, and a sidebar with 'Workflow' and 'Tools' sections. The main content area contains the following fields and elements:

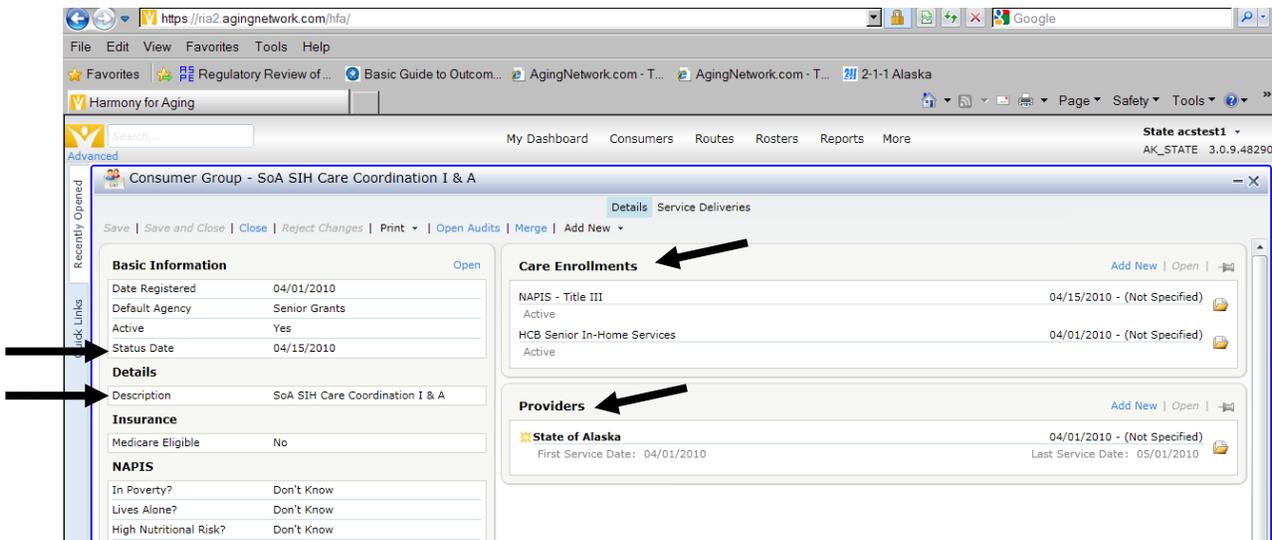
- Care Program:** A dropdown menu.
- Agency:** A dropdown menu with 'Senior Grants' selected.
- Provider:** A dropdown menu.
- Service Category:** A dropdown menu.
- Service:** A dropdown menu.
- Topics:** A text box with '(0 Items)' and a plus icon.
- Service Month/Year:** A text box.
- Units:** A text box.
- Type:** A text box.
- Consumers Served:** A text box.
- Units/Consumer:** A text box with '1.00000000' entered.
- Diagnosis Code:** A text box with a plus icon.
- Service Order No:** A text box with 'Order No : (None)'.

To the right of these fields is a calendar titled 'November, 2012' with columns for Sun, Mon, Tue, Wed, Thu, Fri, and Sat. The calendar shows dates from 1 to 30. Below the calendar is a 'Comments' section with a text box and a plus icon.

Creating a New Consumer Group

To set up a new Consumer Group:

- a. Choose “Add New” from the page menu
- b. Choose “Consumer Group” from the drop down.
- c. The items to enter:
 - Date Registered (should be the first date of month you are going to enter)
 - Description – this will be the title and should start with your Agency’s name or acronym.
 - Care Enrollment for the program – the default is NAPIS-Title III which may be edited to your care enrollment for the consumer group.
 - Provider – Enter your agency’s name.
- d. Save
- e. The consumer Group is now ready to have service deliveries recorded.
- f. Click on “Service Deliveries”
- g. Click “Add New”
- h. Enter service delivery information
- i. Save and close



To return to your list of Consumers

- a. On the page menu, click on the drop down character next to “Consumer Groups”
- b. Click on box for “Deselect All”
- c. Your Consumer List now shows.

SECTION VII

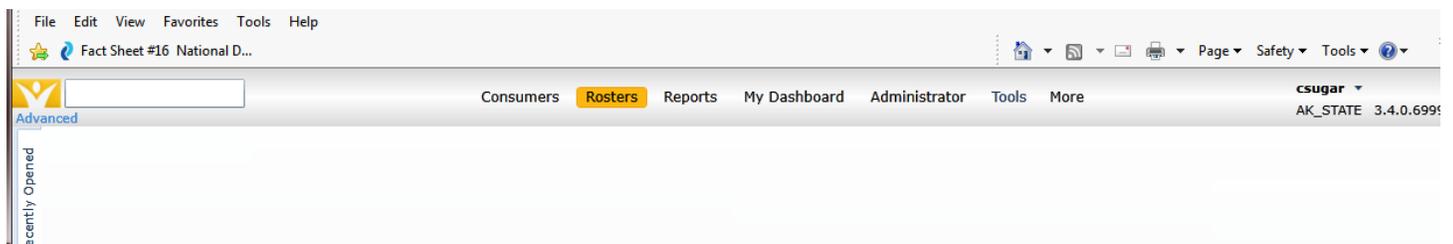
Rosters - Using Rosters for Data Entry

A Roster is a tool that filters clients for a program and service(s) to one list.
A Roster can facilitate quicker data entry of service delivery.

NOTE: Rosters cannot currently be used for the services that require indication of other service details, such as, the STAR Discretionary, National Family Caregiver Support Program, and consumer group entry, because the roster function does not allow us to enter required data elements for those service deliveries.

Creating a Roster

1. Click on “Rosters” on the Navigation Bar at the top of your screen.



2. The screen will show any Roster Definitions that exist for your provider agency.

Row	Actions	Name	Service Filters Based On	Type	Agency	Provider	Service	Care Program
1	[Icons]	test	Service Delivery	Multi-Service	SDS Grants	State of Alaska	3 Items	HCB Senior In-Home Serv
2	[Icons]	State Roster 9 - example conflicting filters	Service Delivery	Specified Service	SDS Grants	State of Alaska	NTS Home Delivered M	NAPIS - Title III
3	[Icons]	TEST Adult Day Services	Service Delivery	Specified Service	SDS Grants	State of Alaska	HCB Adult Day Services	HCB Adult Day Services
4	[Icons]	SOA Adult day	Service Delivery	Specified Service	SDS Grants	State of Alaska	HCB Adult Day Services	HCB Adult Day Services
5	[Icons]	State Roster 4 - Based on Route	Route	Specified Service	SDS Grants	State of Alaska	NTS Home Delivered M	NAPIS - Title III
6	[Icons]	State - Incomplete	Service Delivery	Multi-Service	SDS Grants	State of Alaska		NAPIS - Title III
7	[Icons]	State 2 Roster	(Any)	Multi-Service	SDS Grants	State of Alaska		NAPIS - Title III
8	[Icons]	Today	(Any)	Specified Service	SDS Grants	State of Alaska	TABI Case Management	TABI Case Management
9	[Icons]	State Roster 2 - Assisted Transportation	Service Delivery	Specified Service	SDS Grants	State of Alaska	NTS Assisted Transporta	NAPIS - Title III
10	[Icons]	SOA SIH	Service Delivery	Multi-Service	SDS Grants	State of Alaska	3 Items	HCB Senior In-Home Serv
11	[Icons]	State Roster 3 - Congregate Meals & Assiste	Service Delivery	Multi-Service	SDS Grants	State of Alaska		NAPIS - Title III
12	[Icons]	Medicaid Waiver State Test	Service Delivery	Multi-Service	SDS Grants	State of Alaska	8 Items	Medicaid Waiver
13	[Icons]	State Roster 1 - Congregate Meals	Service Delivery	Specified Service	SDS Grants	State of Alaska	NTS Congregate Meals	NAPIS - Title III

3. Click on “Add New”
4. Under the section labeled “**Rosters**” set/enter the following:
 - a. **Name the roster** beginning with your provider agency’s name or initials
 - b. **Choose a Type** – Multi-Service usually
 - c. **Choose the Care Program** – Adult Day, Short Term Assistance and Referral, NTS, etc.
 - d. **Indicate the Provider** – your agency
 - e. **Based On** – Choose “**Service Delivery**”

File Edit View Favorites Tools Help

Fact Sheet #16 National D...

Consumers Rosters Reports My Dashboard Administrator Tools More

Roster Definition - State of Alaska STAR Service Delivery

Save | Save and Close | Close | Print | Open Audits | Show Preview |

OK | Expand All | Collapse All

Roster

Name

Type

Care Program

Agency

Provider

Based On

Roster Filters (2/15)

Service Filters (0/17)

Route (0/1)

Services

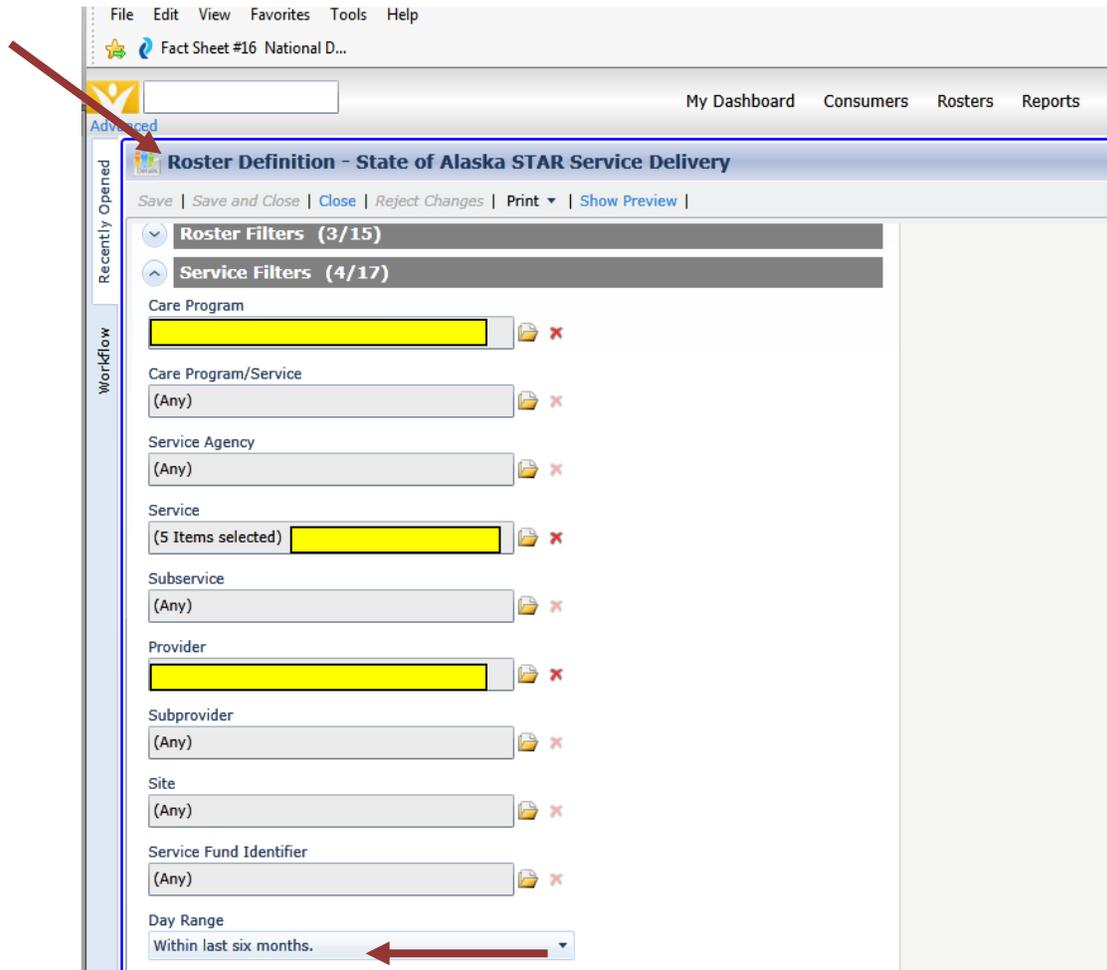
Add New | Open

5. Open the next section labeled **“Roster Filters”** and set/enter the following:
 - a. **Consumer Provider** – enter your agency
 - b. **Include Consumer Groups** – choose **“No”**

The screenshot shows the 'Roster Definition - State of Alaska STAR Service Delivery' interface. The 'Roster Filters (3/15)' section is expanded, displaying the following fields and options:

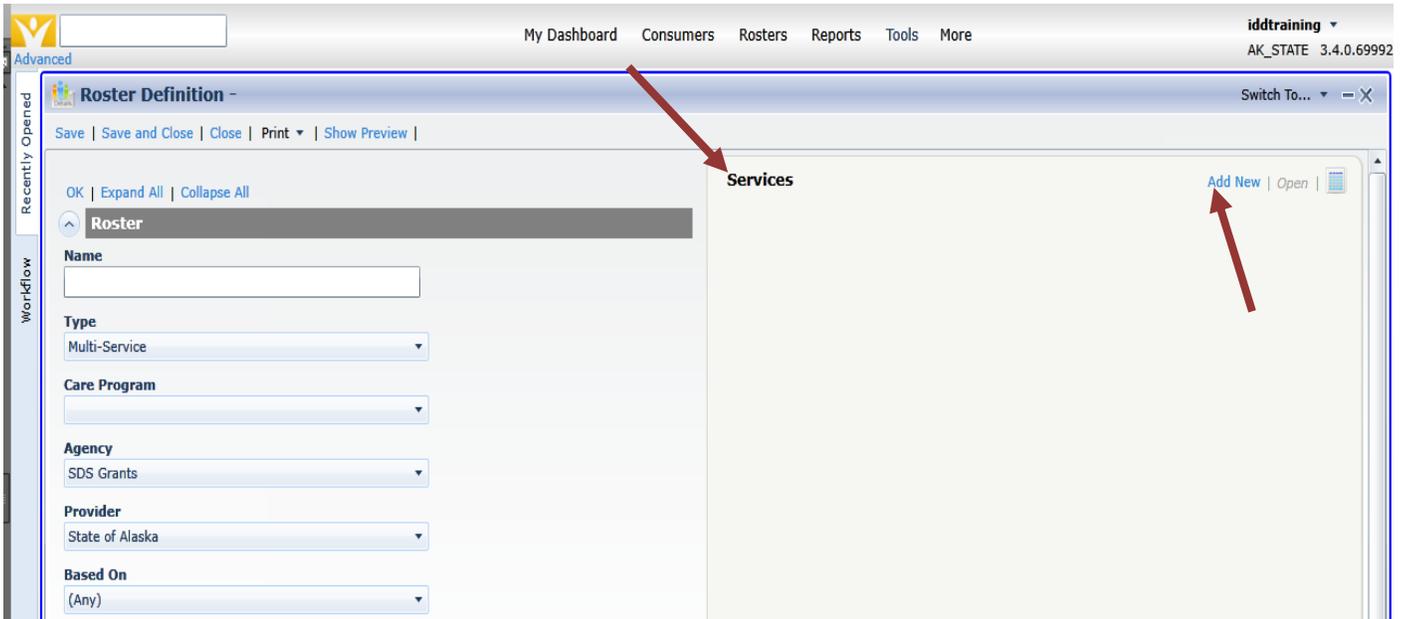
- Last Name Is Like:
- Consumer:
- Care Program (Not Enrolled):
- Default Agency:
- Default Provider:
- Consumer Provider: (highlighted in yellow)
- Primary Care Manager:
- Consumer Care Manager:
- Residential Town:
- Residential ZIP Code:
- Residential County:
- Residential Municipality:
- Include Inactive Consumers:
- Include Consumer Group: (with a red arrow pointing to the 'No' option)
- Consumer Fund Identifier:

6. Open the next section labeled **“Service Filters”** and sent/enter the following:
 - a. **Care Program** – NTS, Adult Day, Short Term Assistance and Referral, etc.
 - b. **Service(s)** – choose all to be included in the Roster, i.e. respite, case management, meals, chore, etc.
 - c. **Provider** – enter your agency again
 - d. **Day Range** – enter a range such as six months. If they do not have serves entered on their record in six months, they will fall of of the roster. The individual can always be added back to roster.

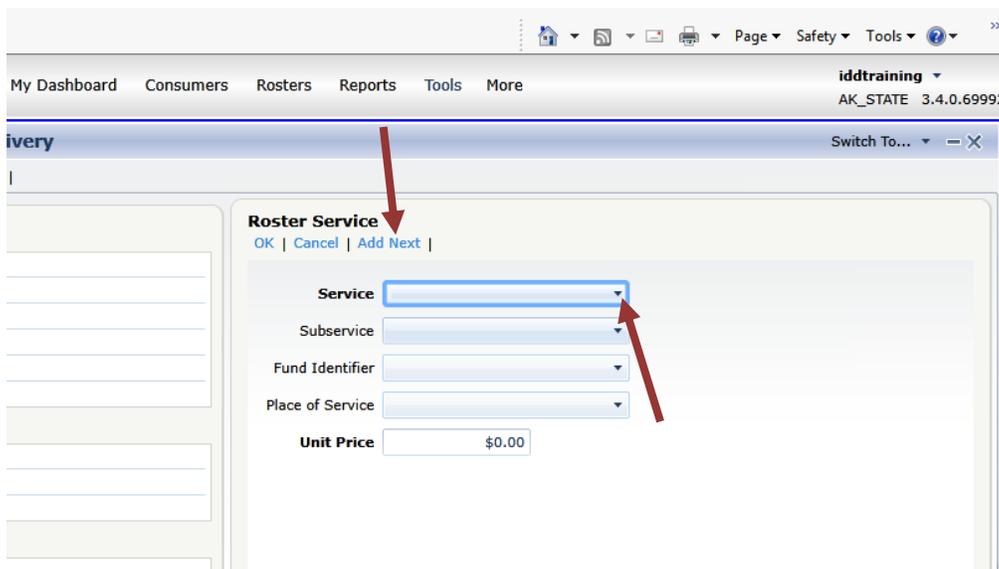


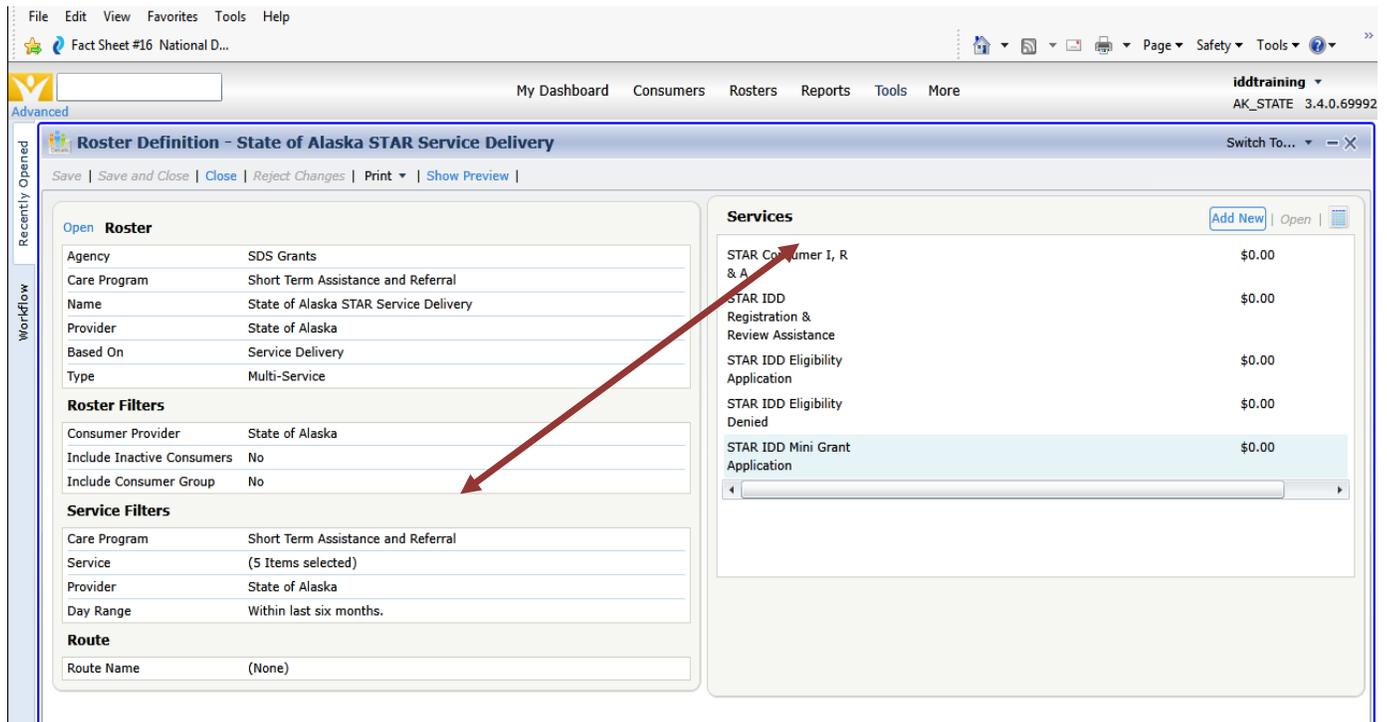
7. **Scroll up** to top of page and click on **“OK”** to close the left side of screen

8. In the **“Services”** box on the right hand side of screen, we need to add the **services to match** the services indicated under the Service Filters section.
9. In the **“Services”** box click on **“Add New”**



10. **Enter each service** that was chosen before under the section for **“Service Filters”**
11. **Use the drop down menu** to enter each service

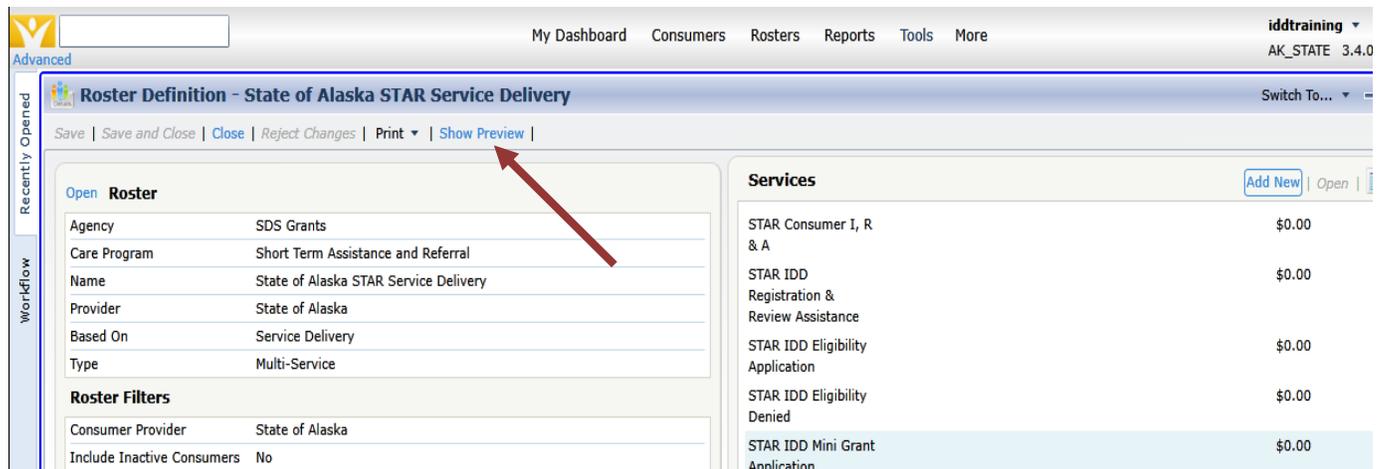




Note: Settings must be accurate to filter the Roster correctly. If you need assistance, please contact the DD Program Manager for assistance.

12. After each service has been entered and matches what was entered before under the "Service Filters" section.

13. Click "Show Preview"



14. Consumers that already have these services on their record, will show here

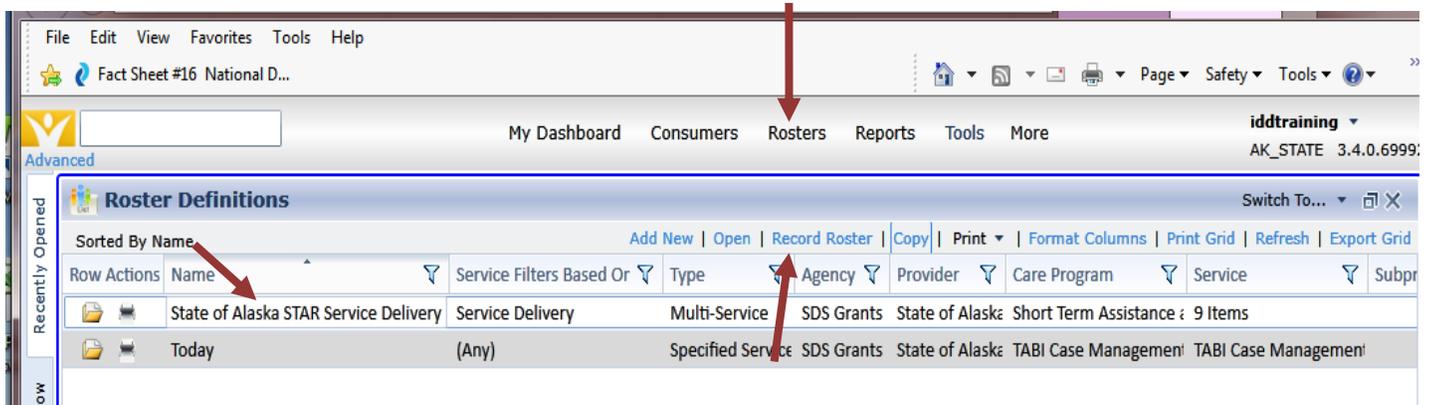
15. If not, they need to be added to the roster.

NOTE: Only consumers set-up as a consumer in SAMS before-hand may be pulled into a Roster.

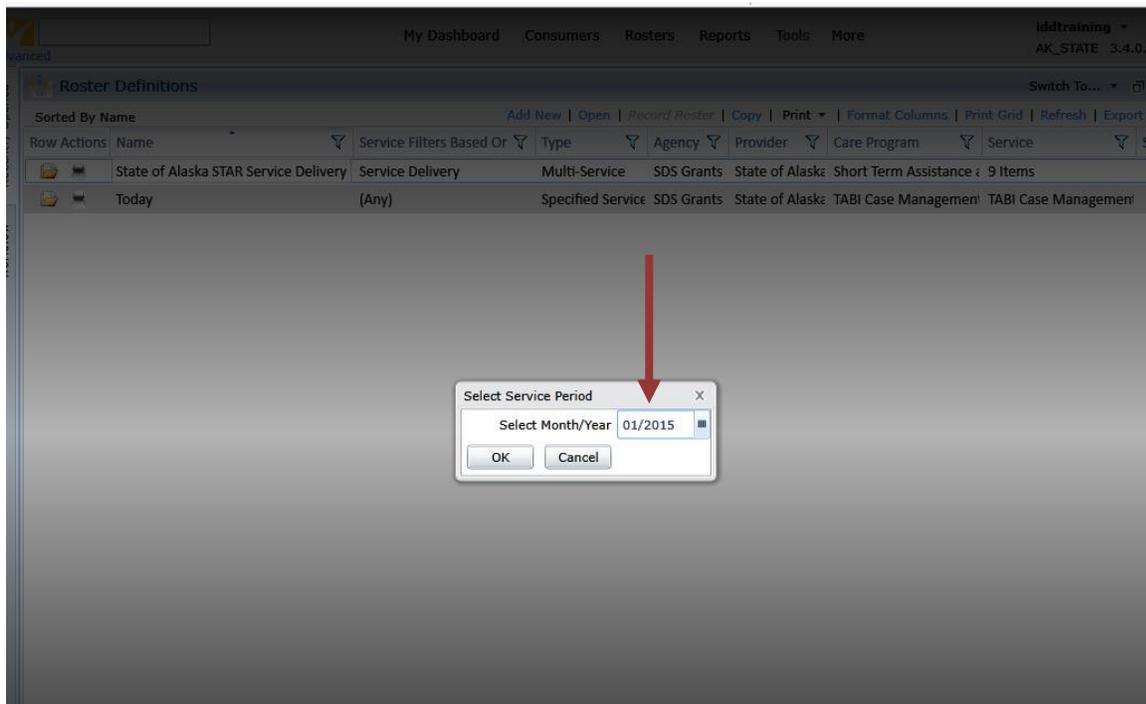
16. Save and Close the Roster

Entering Services Using a Roster

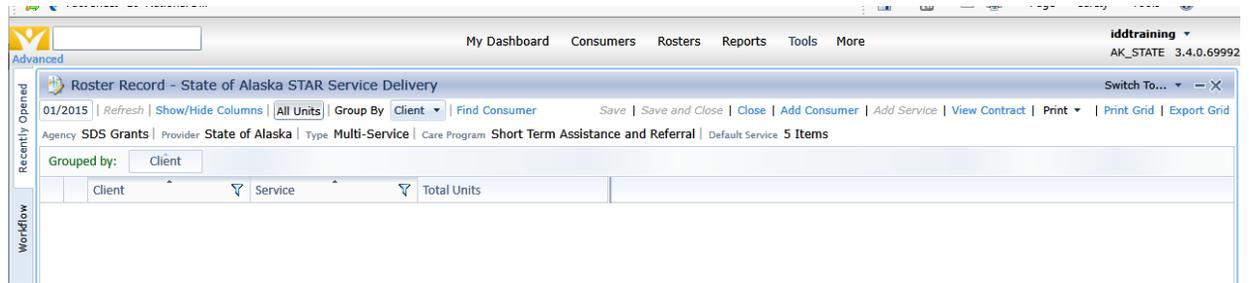
1. Click on Rosters from the Navigation Bar
2. Highlight (do not open) the Roster you wish to use
3. Click on "Record Roster"



4. Enter the **month** and year
5. Click OK



- The Roster will open for the month indicated– it may be blank or list individuals already associated with the program and services – which would be entered on their service delivery record.

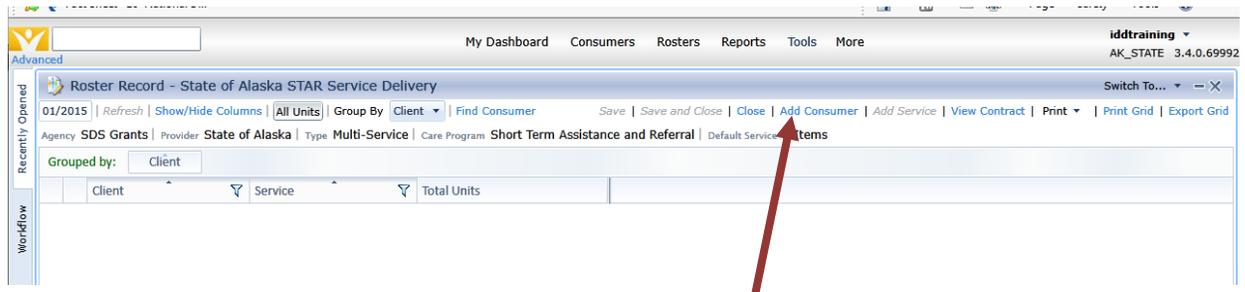


- Note the various Settings available to customize the view: Show/Hide Columns, All Units or Daily Totals, Group By, etc.

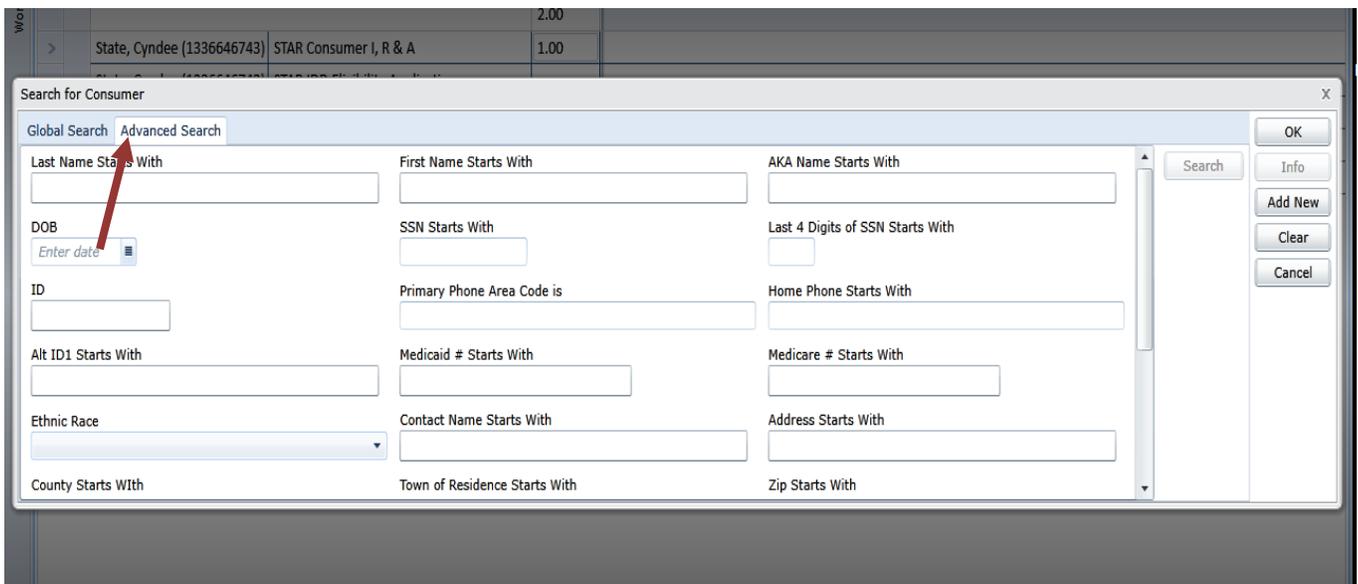
Adding Consumers to the Roster

Note: Only Consumers already set up in SAMS as a consumer may be pulled into a Roster.

1. Click on **“Add Consumer”**



2. Choose **Advanced Search**



3. Enter the consumer's last name
4. Click **Search**
5. **Choose the person from the list, by checking the box**

Note: if the individual is not on the list they are not either set-up in SAMS or have not been associated with the program through the care enrollment or provider.

Global Search | Advanced Search

Last Name Starts With: state
 First Name Starts With:
 AKA Name Starts With:
 Search:
 Info:
 Add New:
 Clear:
 Cancel:

DOB: Enter date
 SSN Starts With:
 Last 4 Digits of SSN Starts With:
 ID:
 Primary Phone Area Code is:
 Home Phone Starts With:
 Alt ID1 Starts With:
 Medicaid # Starts With:
 Medicare # Starts With:
 Ethnic Race:
 Contact Name Starts With:
 Address Starts With:
 County Starts With:
 Town of Residence Starts With:
 Zip Starts With:

Search for: Last Name Starts With 'state'

Format Columns | Select All | Deselect All

Inc?	Consumer Type	Active?	ID	Name	DOB	Address
<input type="checkbox"/>	Consumer	<input type="checkbox"/>	206354321	State Jr, Testing1 P	02/06/1935	100 Main Street
<input type="checkbox"/>	Consumer	<input type="checkbox"/>	1344703310	State Of Alaska		Senior Benefits P
<input checked="" type="checkbox"/>	Consumer	<input checked="" type="checkbox"/>	1336646743	State, Cyndee	01/01/1980	5555 Anywhere
<input type="checkbox"/>	Consumer	<input checked="" type="checkbox"/>	1333938574	State, Kris	12/13/2000	1106 Main Stree
<input type="checkbox"/>	Consumer	<input checked="" type="checkbox"/>	1375614722	State, Maria		
<input type="checkbox"/>	Consumer	<input checked="" type="checkbox"/>	1326162415	State, Mary	10/15/2005	110680 Main St

6. Click **Okay**

7. The consumer is added to your roster screen

File Edit View Favorites Tools Help

Fact Sheet #16 National D...

My Dashboard Consumers Rosters Reports Tools More

iddtraining AK_STATE

Roster Record - State of Alaska STAR Service Delivery

07/2014 | Refresh | Show/Hide Columns | All Units | Group By Client | Find Consumer Save | Save and Close | Close | Add Consumer | Add Service | View Contract | Print | Print Grid |

Agency SDS Grants | Provider State of Alaska | Type Multi-Service | Care Program Short Term Assistance and Referral | Default Service 5 Items

Grouped by: Client

Client	Service	Total Units
State, Cyndee (1336646743)		
State, Cyndee (1336646743)	STAR Consumer I, R & A	2.00
State, Cyndee (1336646743)	STAR IDD Eligibility Applicatio	1.00
State, Cyndee (1336646743)	STAR IDD Eligibility Denied	1.00
State, Cyndee (1336646743)	STAR IDD Mini Grant Applicat	
State, Cyndee (1336646743)	STAR IDD Registration & Revie	

8. Enter the services delivered (numbers will remain blue until saved)

Client	Service	Total Units
^ State, Cyndee (1336646743)		
		3.00
State, Cyndee (1336646743)	STAR Consumer I, R & A	2.00
State, Cyndee (1336646743)	STAR IDD Eligibility Application	
State, Cyndee (1336646743)	STAR IDD Eligibility Denied	1.00
State, Cyndee (1336646743)	STAR IDD Mini Grant Application	
State, Cyndee (1336646743)	STAR IDD Registration & Review Assistance	

9. Save (units turn to black) or Save and Close

Note: if you did not enter units and save, the individual will not remain on the Roster. In the future follow the steps to “add consumer to roster” to pull them to the Roster then add units.

Client	Service	Total Units
^ State, Cyndee (1336646743)		
		3.00
State, Cyndee (1336646743)	STAR Consumer I, R & A	2.00
State, Cyndee (1336646743)	STAR IDD Eligibility Application	
State, Cyndee (1336646743)	STAR IDD Eligibility Denied	1.00
State, Cyndee (1336646743)	STAR IDD Mini Grant Application	
State, Cyndee (1336646743)	STAR IDD Registration & Review Assistance	

10. For future months of data entry follow the same steps:

- Highlight the Roster
- Choose Record roster
- Enter next month, etc.

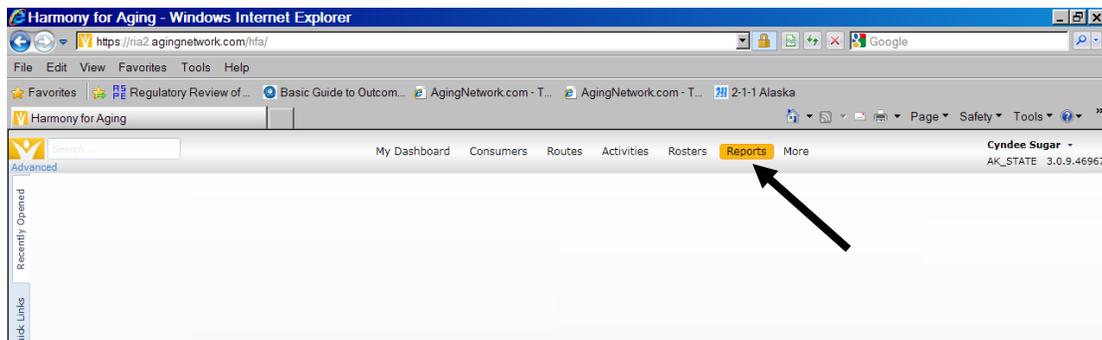
11. To switch to another month within the Roster, change the month and year and Refresh.

Client	Service	Total Units
^ State1, State1 (501461234)		
State1, State1 (501461234)	HCB Adult Day Services	
^ Test, Ida (1360141998)		
Test, Ida (1360141998)	HCB Adult Day Services	

SECTION VIII

Reports from SAMS

From the Main Screen, click Reports on the navigation bar



- There are different types/formats of reports available.
- Service Reports are the type we use most
- Service Reports are based on a period of service delivery, such as a month, quarter, or year.
- The most common Service Report we use is the Agency Summary Report.
- Other popular types of reports include the:
 - a) NAPIS Consuming Listing,
 - b) SAMS Service Delivery Consumer Listing Report, and
 - c) Service Delivery Consumer Mailing Label

Running an Agency Summary Report

1. The screen is split into two halves:

- **Reports** - top half (types available) and
- **Report Definitions** - bottom half (saved report definitions).

The screenshot shows a software interface with two main sections: 'Reports' and 'Report Definitions'.

Reports Section:

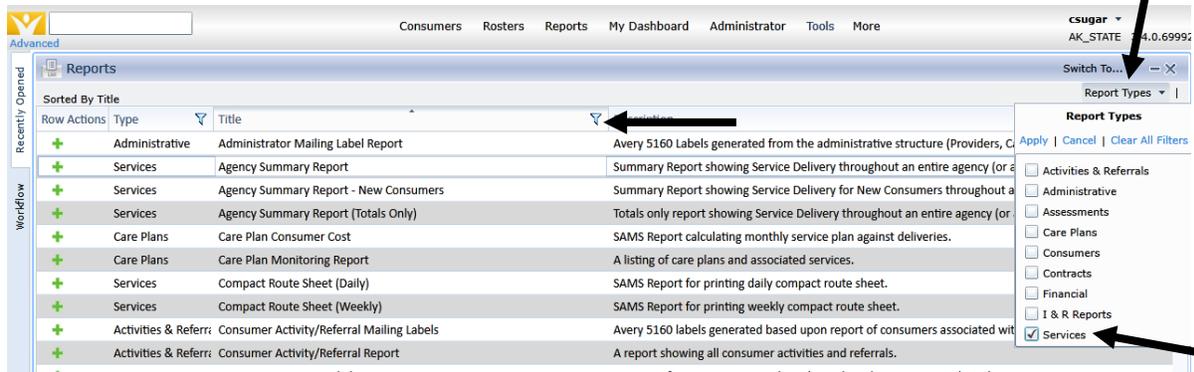
- Header: Reports
- Sorted By: Title
- Columns: Row Actions, Type, Title, Description
- Items:
 - Administrative: Administrator Mailing Label Report
 - Services: Agency Summary Report
 - Services: Agency Summary Report - New Consumers
 - Services: Agency Summary Report (Totals Only)
 - Care Plans: Care Plan Consumer Cost
 - Care Plans: Care Plan Monitoring Report
 - Services: Compact Route Sheet (Daily)
 - Services: Compact Route Sheet (Weekly)
 - Activities & Referr: Consumer Activity/Referral Mailing Labels
 - Activities & Referr: Consumer Activity/Referral Report
 - Services: Consumer Contact And Phone Listing Report
 - Financial: Consumer Co-Payment Report
 - Consumers: Consumer Goal Report
 - Financial: Consumer Invoice and Payment Report
- Status: 61 Reports, 1 Selected

Report Definitions Section:

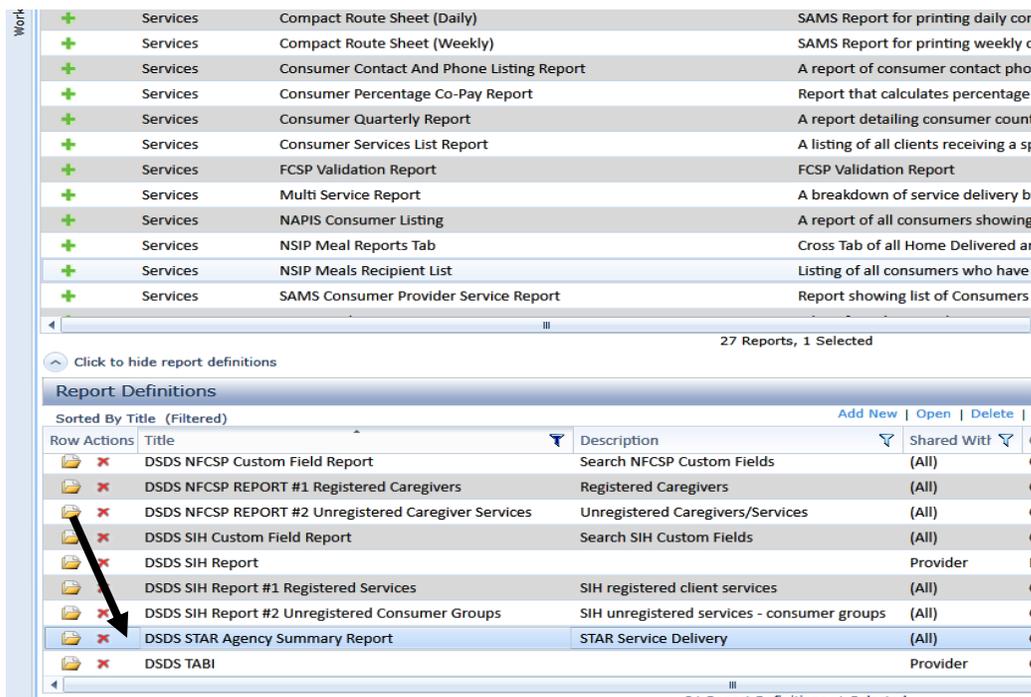
- Header: Report Definitions
- Sorted By: Title (Filtered)
- Columns: Row Actions, Title, Description, Shared With, Create User, Last Update User, Last Updated, Comr
- Items:
 - DSDS Adult Day Custom Field Report
 - DSDS Adult Day Services
 - DSDS Adult Day Services #1
 - DSDS Adult Day Transportation
 - DSDS All Grant Services
 - DSDS All Grant Services-ONE Provider
 - DSDS Bridges Deaf Navigator
 - DSDS Caregiver Relationship
 - DSDS Center for Psychosocial Development
- Status: 21 Report Definitions, 1 Selected

2. Each Report highlighted on the top list = a different list of saved Report Definitions (bottom list) defined and saved by users.

- To sort the top list by **“Report Type,”** use the **“Report Type”** drop down menu at the right **OR** filter the column labeled **“Title.”**
- Either way, Filter the report type to **“Services.”**

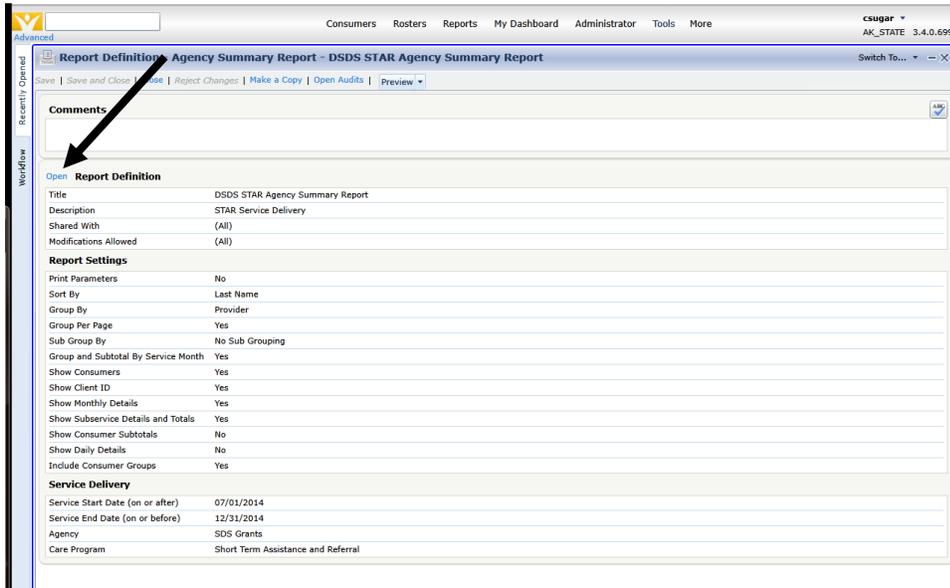


- Highlight the **Agency Summary** report format on the top list
- On the bottom list for **“Report Definitions”** scroll down and locate the report title **“DSDS STAR Agency Summary Report.”**

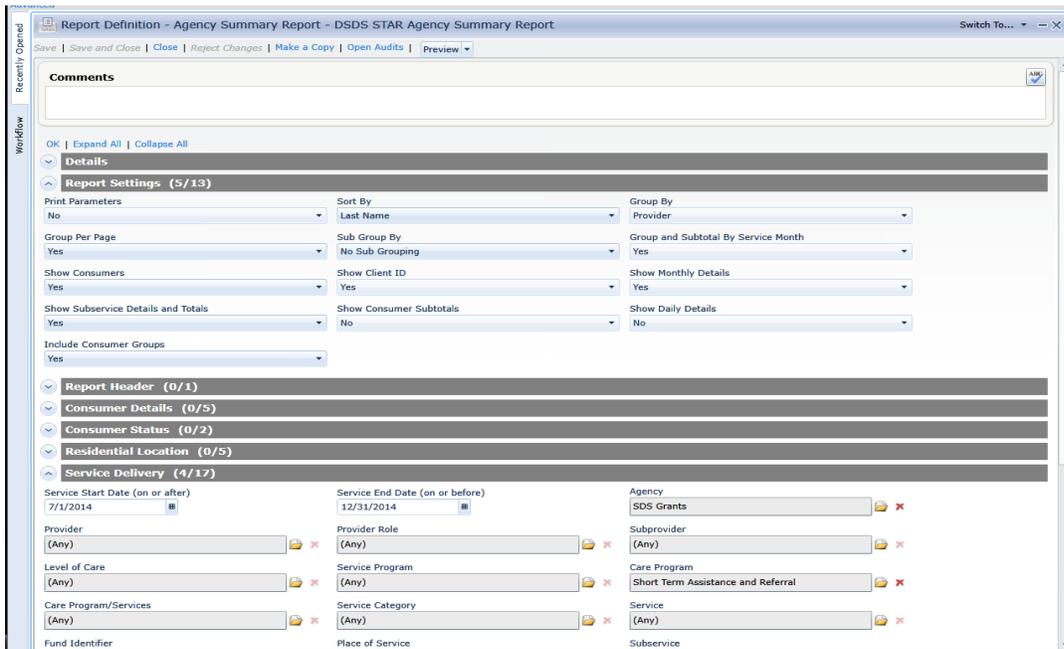


Note: You can also filter the bottom list by title, i.e. those that begin with DSDS – this will shorten the list that you are viewing.

- Open the “DSDS STAR Agency Summary Report” by double clicking or clicking on the gold file folder.

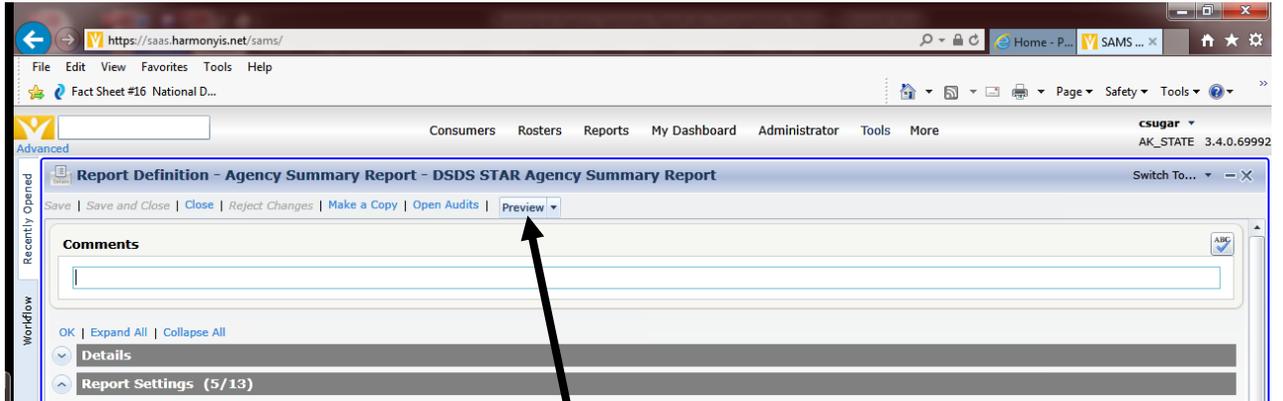


- Click on “**Open**” to open the parameters of the Report Definition
- This is a report template that has been created to for use by all STAR programs for quarterly reports, etc.
- Note the grey section headings



11. Locate the grey section heading for “Service Delivery” and indicate the following:
 - a. Service Start Date
 - b. Service End Date
 - c. Provider (choose your agency from the list)

12. Scroll up and click on “Preview”



13. Wait while the report is generating.

Agency Summary Report		Service Period: From 7/1/2014 to 12/31/2014				1/6/2015
- DSDS STAR Agency Summary Report						
Agency:	SDS Grants	* Consumers/ Consumer Groups	Period	Units	Average Price per Unit	Cost
Provider: State of Alaska						
Service: STAR Consumer I, R & A						
Subservice: (No Subservice)						
1336646743	Cynde	State	August 2014	6.00	\$0.00 / 1 contact	\$0.00
1326162415	Mary	State	August 2014	10.00	\$0.00 / 1 contact	\$0.00
1390335114	William	State	August 2014	6.00	\$0.00 / 1 contact	\$0.00
Subtotal for August 2014:		3 / 0		22.00		\$0.00
Subtotal for Subservice:		3 / 0		22.00		\$0.00
Subtotal for Service:		3 / 0		22.00		\$0.00
Service: STAR IDD Eligibility Application						
Subservice: (No Subservice)						
1336646743	Cynde	State	August 2014	1.00	\$0.00 / Occurrence	\$0.00
Subtotal for August 2014:		1 / 0		1.00		\$0.00
Subtotal for Subservice:		1 / 0		1.00		\$0.00
Subtotal for Service:		1 / 0		1.00		\$0.00
Service: STAR IDD Mini Grant Application						
Subservice: (No Subservice)						
1326162415	Mary	State	August 2014	1.00	\$0.00 / Occurrence	\$0.00
Subtotal for August 2014:		1 / 0		1.00		\$0.00
Subtotal for Subservice:		1 / 0		1.00		\$0.00
Subtotal for Service:		1 / 0		1.00		\$0.00
Service: STAR IDD Registration & Review Assistance						
Subservice: (No Subservice)						
1326162415	Mary	State	August 2014	1.00	\$0.00 / Occurrence	\$0.00
Subtotal for August 2014:		1 / 0		1.00		\$0.00
Subtotal for Subservice:		1 / 0		1.00		\$0.00
Subtotal for Service:		1 / 0		1.00		\$0.00
Subtotal for Provider:		3 / 0		25.00		\$0.00
Total For Agency:		3 / 0		25.00		\$0.00
Grand Total:		3 / 0		25.00		\$0.00

* Consumer counts are distinct over group totals. Grand Total represents the distinct count of consumers served.

Printed: 1/6/2015 8:40:00PM Page 1 of 1
Rev. 20150306

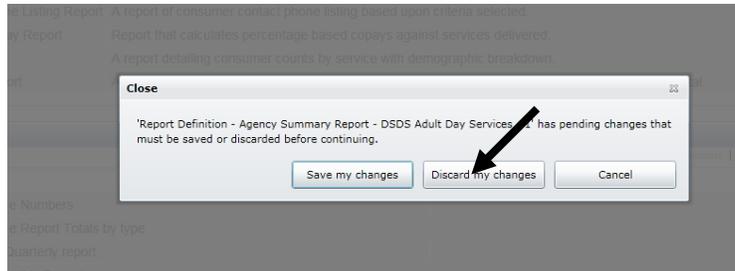
14. Review the Report, does it seem correct?

Note: **If the report did not generate**, then the configurations in Appendix A are most-likely not set.

15. You may return to the report and reset parameters and preview again as needed, etc.

16. **Print report as necessary.**

17. **When closing the report that is for all STAR programs - always choose “DISCARD MY CHANGES” to reset the parameters for the next user.**



If you saved, you can go back in and choose “any” for provider so that it will be ready for the next user.

You may also contact your program manager for assistance with resetting, etc.

If you would like your own set of these reports created – follow these steps or contact the program manager:

1. On the bottom list, highlight the report you wish to make a copy of
2. On the menu ribbon for the bottom half of the screen – click on “copy”
3. A window will open allowing you to enter a new name for the report
4. Replace the first part including DSDS with your agency’s name or acronym.
5. The report definition will open up and allow you make additional parameter changes.
6. Add you agency as a provider under the “Service Delivery” section at bottom right
7. Save changes rather than discard.
8. The report will alphabetize within the list on the screen
9. If you set a filter for the bottom list - it will need to be updated.

NAPIS Consumer Listing

Demographic Report - Recommend running each quarter

This report can be very helpful in making sure that the majority of demographic information has been entered.

To run this reports:

- Click on Reports
- On the top half of the screen "Reports," locate the report template called "NAPIS Consumer Listing"
- Highlight it
- At the bottom half of the screen "Report Definitions" choose the report appropriate for your program
- Open the report
- Set the service start and end dates
- Choose your agency as the "provider"
- Click on Preview
- Consumers missing data will be displayed.
- The items that have a dash in them or are blank are missing items and need to be corrected.
- Some items may not be applicable to your program and if those are the only items missing, then you can ignore them.

The screenshot displays the NAPIS software interface. The top navigation bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. Below this is a menu bar with 'Consumers', 'Rosters', 'Reports', 'My Dashboard', 'Administrator', 'Tools', and 'More'. The 'Reports' section is active, showing a list of reports sorted by title. A black arrow points to the 'NAPIS Consumer Listing' report. Below the reports list is the 'Report Definitions' section, which is also sorted by title. A black arrow points to the 'DSDS Adult Day Napis Demographics Missing' report definition.

Row Actions	Type	Title	Description
+	Services	Consumer Services List Report	A listing of all clients receiving a specified service or services totaling by client along with a grand total.
+	Services	FCSP Validation Report	FCSP Validation Report
+	Services	Multi Service Report	A breakdown of service delivery by multiple-categories. Displays distinct consumer count or total service u
+	Services	NAPIS Consumer Listing	A report of all consumers showing results based upon criteria selected.
+	Services	NSIP Meal Reports Tab	Cross Tab of all Home Delivered and Congregate Meals (NSIP Meals) delivered in a specified time period.
+	Services	NSIP Meals Recipient List	Listing of all consumers who have received a Home Delivered or Congregate Meal (NSIP Meal) in a specifie
+	Services	SAMS Consumer Provider Service Report	Report showing list of Consumers who have received services. Report results include Last Name, First Nam
+	Services	SAMS Kitchen Report	A list of meal counts, by Route.
+	Services	SAMS Service Delivery Consumer Listing report (with Care Recipient Data)	Service Delivery Consumer Listing Report for AoA Annual National Survey
+	Services	Service Category Monthly Report	Monthly Agency performance report on Service Category
+	Services	Service Delivery Consumer Listing	Report showing list of consumers who have received a specified service or services. Report results include
+	Services	Service Delivery Consumer Mailing Label	Avery 5160 Labels generated for consumers receiving a specified service or services.
+	Services	Service Delivery Export Report	Report showing a summary of delivered services that can easily be exported for manual modification and r
+	Services	Service Delivery Profile - Cross Tab	Cross Tab of all clients receiving a specified service or services broken down in a cross tab.
+	Services	Service Demographics	A report of services delivered and related consumer demographics statistics, by fiscal period and for curre
+	Services	Service Suspension Report	A report of consumers and suspended services, not specifically tied to care planned services.
+	Services	Topic Profile - Outcome Chart	A chart illustrating all topic outcomes.
+	Services	Topic Profile - Topic Hours Distribution	A listing of all topics recorded sorted by consumer.

Row Actions	Title (Filtered)	Description	Shared With	Create User	Last Update User	Last Updated	Comme
✖	DSDS Adult Day Napis Demographics Missing	Adult Day Demographics Missing	(All)	Cyndee Sugar	Cyndee Sugar	11/7/2012 10:48:16	Created
✖	DSDS Family Caregiver Napis Demographics Missing	Caregiver Napis Demographics Missing	(All)	State acstest1	Cyndee Sugar	8/9/2013 2:32:31 PM	Created
✖	DSDS S... Napis Demographics Missing		(All)	Cyndee Sugar	Cyndee Sugar	1/18/2013 10:02:55	Created
✖	DSDS STAR Demographics Missing	Adult Day Demographics Missing	(All)	Cyndee Sugar	Cyndee Sugar	1/6/2015 4:57:52 PM	Created

NAPIS Consumer Listing
 - DSDS STAR Demographics Missing



12/31/2014

01/06/2015

Client ID	Last Name	First Name	MI	DOB	Gender	Ethnic Race	Ethnicity	Lives Alone	In Poverty	High Nutr Risk	Is Rural	ADLs	IADLs
Provider: State of Alaska													
1326162415	State	Mary		10/15/2005	F	Asian	-	-	-	-	N	-	-
1336646743	State	Cyndee		01/01/1980	F	American Indian/Native Alaskan	Not Hispanic or Latino	Y	Y	-	Y	-	-
1390335114	state	william											
Subtotal: 3 consumers													
Total: 3 consumers													
Summary: 3 Clients; 0 Groups.													

A copy of this report may also be made for your agency – see previous section for steps.

SECTION IX

Tips & Short-cuts:

Navigation - A few pointers that work throughout most on screens with common icons/symbols:

This indicates which list is showing.

This symbol shows how the column is sorted, either ascending or descending. Click on it to change the order.

I call this a menu ribbon

If the list is filtered it will indicate which column, i.e., name and if the mouse hovers over the area, will indicate which name it is filtered to.

This is one of my favorite items. The Filter Icon. Where ever you see it you can filter that column. Click on the filter symbol and enter what you'd like to filter. For example for Name – if you enter the letters “Mat” – it will show you all of the last names that begin with “Mat” – it is a very quick way to find a consumer on your consumer list if it is large.

Row Action	Consumer Type	Active?	ID	Name	Date Registered	Address	Town of Residence	County of Residence	Home Phone	Sta
	Consumer	✓	1330151003	Demo, Jane A	01/01/2011	100000 Glacier Way	Juneau	Alaska (Counties)	(907) 790-5555	02,
	Consumer	✓	1384943133	Demo, Martha	01/01/2011		Juneau	Alaska (Counties)		02,
				Family Caregiver Outreach	07/03/2006					
			1348696082	Gone, Zummie	11/01/2010	4452				
			101335555	J, State5	06/14/2004	200 S				
			1363084047	Smith, State	07/01/2006					
				SoA SIH Case Management I & A	04/01/2010					
				State Case Management	10/06/2006					
				State Consumer Group 1	06/16/2006					
			206354321	State Jr., Testing1 P	01/01/2004	100 N				
	Consumer Group	✓		State of Alaska Presentations	01/01/2011					
	Consumer Group	✓		State of Alaska testing	07/01/2012					
	Consumer	✓	501461234	State1, State1	05/30/2006	1220 Glacier	Juneau	Alaska (Counties)	(907) 321-4567	
	Consumer	✓	101300898	State2, State2	06/13/2006	1001 Main Street	Juneau	Alaska (Counties)		
	Consumer	✓	1358532351	State25, State25	10/14/2005	Smith Avenue	Juneau	Alaska (Counties)		

Also:

- Use **Format Columns** on the menu ribbon to indicate which columns to appear on your screen
- A **column heading** may be dragged to another spot, by clicking and dragging.
- Use the **“Recently Opened”** on far right horizontally to navigate back to previously opened record during the session currently logged into.

SECTION X

FAQs

1. What happens when a consumer no longer receives services from a grant program?

Answer: This depends upon whether the client passed away or stopped receiving services for another reason.

- a. If the person has passed away or moved out of state, change the consumer's active status in their Details/Basic Information. Uncheck the active box and enter the reason.
- b. End dates may also be entered for the care enrollments and providers. Termination date, etc. DOES NOT need to be entered – just end date.
- c. If the person has moved to another community or stopped services for another reason, enter an end date on the care enrollment or provider, whichever is appropriate.
- d. **If the consumer has NOT passed away** and you set them as “Not Active” –you have inactivated them in the data base for everyone. Please only change the status to “not active” if they've passed or moved out of state.

2. Why is a consumer not showing on my Roster?

Answer: The consumer may not have the care enrollment saved on their record, there is an “end” date on the care enrollment, or the individual is not active. Check the following:

- a. the care enrollment is on the consumer's record for the program, or
- b. that there is no end date listed for the care enrollment, or
- c. make sure the person is Active.

3. Why is SAMS not saving what I've entered and giving me a message about not having permission and/or contact the administrator?

Answer: This message will be received if you have not listed and saved your provider agency on the consumer's record.

- a. Check to be sure that you have entered your agency as a Provider on the client record, save, and try again.

4. When I go to enter a service, why is the service not showing as a choice?

Answer: The care enrollment and/or provider is likely missing on the consumer's record.

- a. Be sure the care enrollment for the program has been added, or
- b. Check to be sure you have chosen the correct care program and service category, or
- c. Be sure the your provider agency has been added to the client's record

5. Are there annual updates we need to do?

Answer: Yes!

- a. Each year when a consumer is assessed or any data has changed, you must enter/update that information in SAMS AND enter a new date for “Consumer Details Last Reviewed.”

6. What do I do if a client does NOT receive services in a month?

Answer: Nothing.

If the client did not receive services during the month, there is nothing to enter. Only services that were provided are entered.

7. Why can't I delete something I've entered?

Answer: Only Administrators have permissions to delete in the data base.

This is to protect the integrity of the data. Once something is deleted, it cannot be retrieved. Users can edit data, but in cases where something needs to be deleted you will need to contact the program manager.

You may also send an email with the client's SAMS id number, initials, month and item or service to be deleted. Please do not send client names via email.

8. Why do I receive an error message when I try to enter a zero (0)?

Answer: Zero, by itself, is not recognized as an entry. If you have already entered service delivery units and saved, whether in a service delivery record or through Rosters, you have saved a service delivery. Trying to cancel them out of delete by entering a zero will not work. A service delivery record has been created and can only be deleted by an Administrator. Users may edit service delivery units to other numbers, but not zero.

9. What happens if I create a duplicate record for a consumer?

Answer: It happens.

Don't beat yourself up about it. You can either perform a merge or send the information to the program manager for assistance. However, if a caregiver or care recipient is listed in any of the records to be merged, it becomes much more complicated and you will need to refer these to the program manager to resolve.

SDS GRANTS

SAMS
DATA ENTRY MANUAL

APPENDIX A

Computer Configuration Requirements

New Data Center Preparation for Customers

Getting Ready — Data Center Transition Preparation: Easy as 1-2-3-4

Getting Ready: Data Center Transition Preparation: Easy as 1-2-3-4

The Data Center Transition process is relatively easy, but does require some preparation by you and all SAMS users. Below is a list of items that will need to be configured on each computer that is used to access Harmony applications (SAMS Suite). The first column of the chart below indicates the action that you and your users will need to take, the second column explains why and third column indicates when this configuration should be completed.

#	Preparation Action/Description	Reason	When should your users complete this task?
1	Bookmark a new Harmony Customer Portal URL	There will be a new logon page activated during your migration weekend.	Anytime, but do not logon to the new site until your scheduled data center transition weekend
2	Add new URLs to Internet Explorer Trusted Sites to ensure ease of access to SAMS 3	This will ensure that browser security settings do not block web pages from resolving.	As soon as possible, but no later than a week before your scheduled data center transition weekend
3	Allow Pop-Ups in Internet Explorer	This will ensure SAMS 3 reports run properly, and Citrix Products launch from the Harmony Customer Portal	As soon as possible, but no later than a week before your scheduled data center transition weekend
4	Add a new URL to Silverlight Application Storage	This ensures that you can download updates to SAMS 3 faster	This will be done automatically the first time you launch an application after the data center transition (see page 6)

This guide assumes that end users already have the correct version of Silverlight (Version 5.1.30214.0) installed and meet all SAMS 3 product minimum requirements. For more information on minimum requirements, please review the Harmony Computer Configuration document available in the Application Support Resources area of the Harmony Customer Portal.

Step 1: Bookmarking the New Harmony Customer Portal URL

1. Open your Internet Explorer browser
2. Go to following site : <https://login.harmonyis.net>

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. Click on "Bookmark this page" and Click "Add"

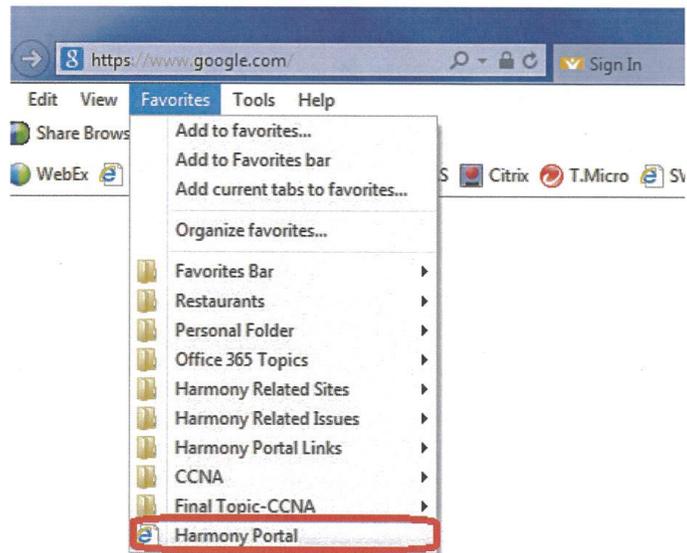
Add a Favorite

Add a Favorite
Add this webpage as a favorite. To access your favorites, visit the Favorites Center.

Name:

Create in:

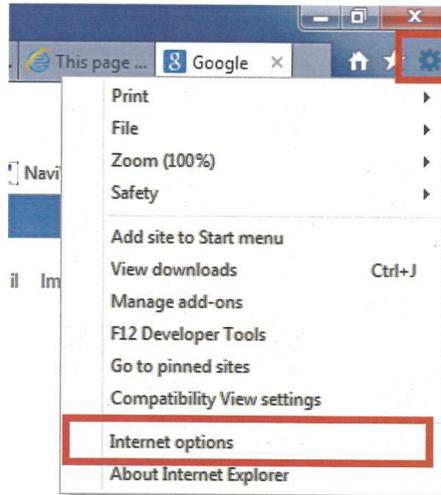
4. This link will now be available in your Internet Explorer Favorites list



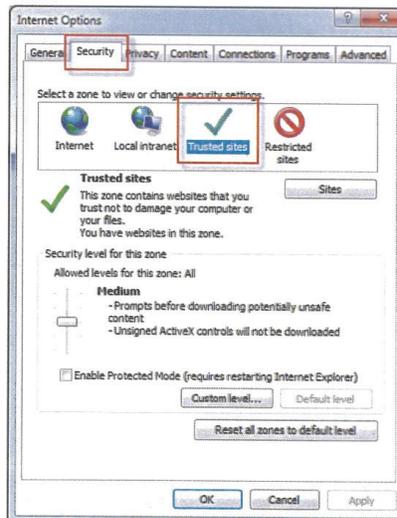
Step 2: Adding new URLs to Internet Explorer Trusted Sites

To prevent issues that can occur when attempting to launch applications from the Harmony Customer Portal, and to ensure successful login after updates, you can follow the steps below to add the Harmony Portal and various application URLs as trusted sites in Internet Explorer.

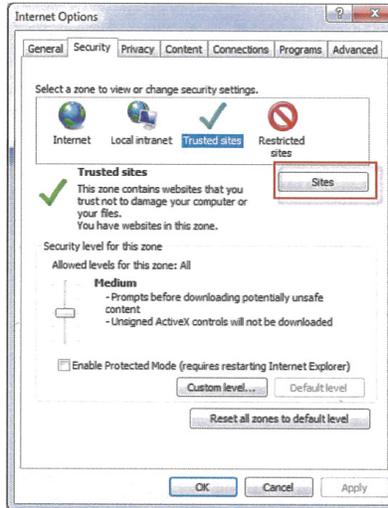
1. Open Internet Explorer browser
2. Click "Tools"
3. Go to "Internet Options"



4. Click the "Security" tab and select "Trusted Sites"



5. Click "Sites"



6. Enter the trusted website name and click "Add":

All Harmony users need to add the following trusted sites:

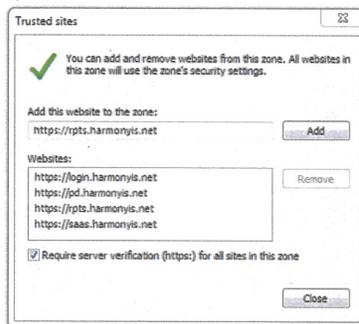
- <https://login.harmonyis.net>
- <https://harmonyis.cachefly.net>

All Harmony Provider Direct users need to add the following trusted site:

- <https://pd.harmonyis.net>

All Harmony SAMS users need to add the following trusted sites:

- <https://saas.harmonyis.net>
- <https://rpts.harmonyis.net>

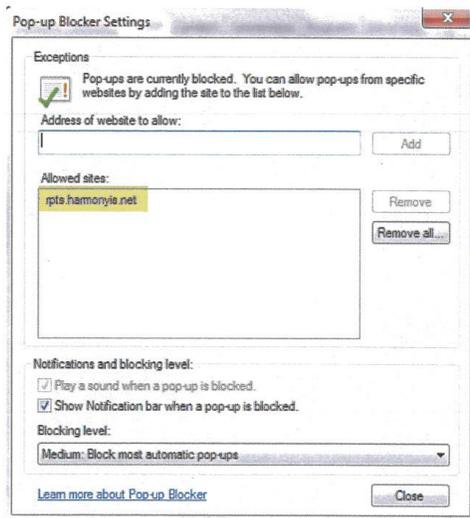
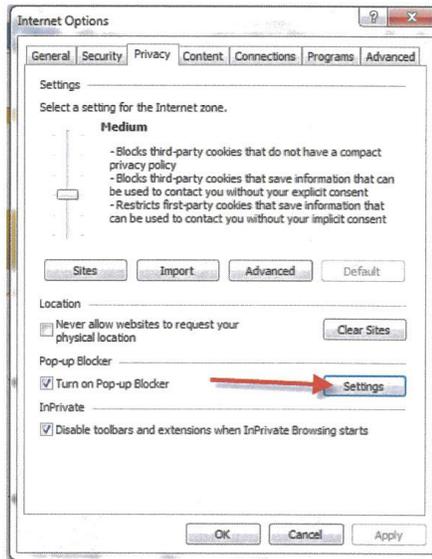


7. Click "Close"

8. Click "OK" on the Internet Options window

Step 3: Allowing Pop-Ups in Internet Explorer

1. Open your Internet Explorer and click "Internet Options" as we mentioned above in Step 3
2. Go to "Privacy" tab, under Pop-Up Blocker, Select "Settings"



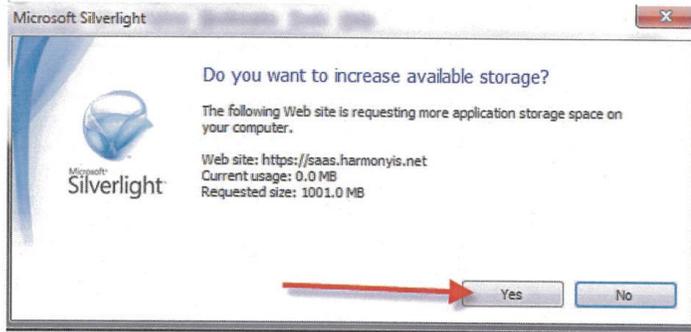
3. Add "rpts.harmonyis.net", click close, save and apply settings

Step 4: Adding a new URL to Silverlight Application Storage

On your initial logon to this new site, you will be prompted to increase application storage.



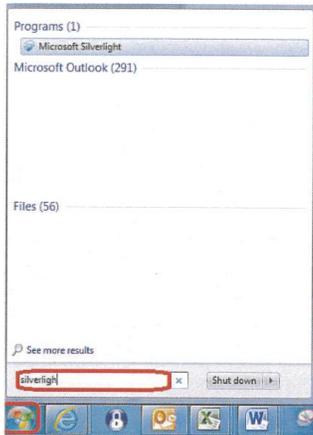
1. Click "Increase Application Storage".



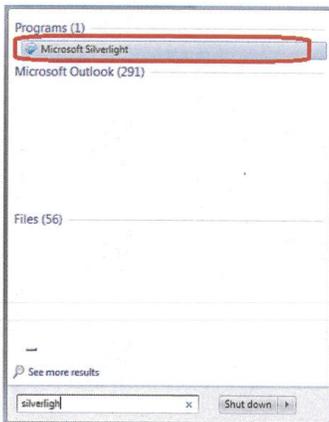
2. Click "Yes"

Confirm that you have successfully increased application storage for all the sites indicated below:

1. Navigate to the Start Menu and type Silverlight

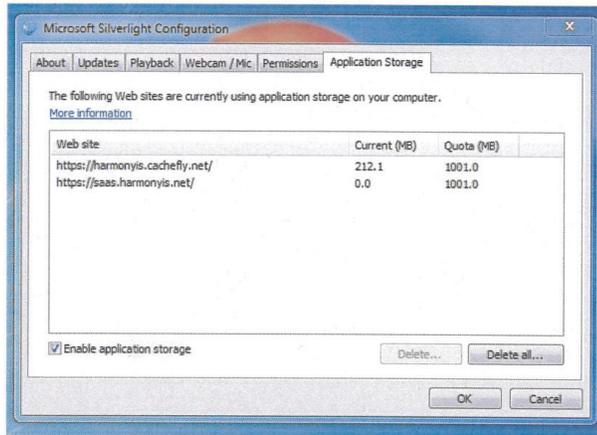


2. Click on Silverlight to open it



3. The Silverlight Configuration dialog box will appear.
4. Click the "Application Storage" tab.

Confirm entries on the following page



For question or more information, please contact Harmony Support at

- support@harmonyis.com or
- 1-800-318-7260

SDS GRANTS

SAMS DATA ENTRY MANUAL

APPENDIX B

SDS - SAMS Consumer Registration & Characteristics
Forms

ADS & SIH SAMS Consumer Registration Form

(CONFIDENTIAL INFORMATION – all items/sections marked with * are required)

***CARE ENROLLMENT**

HCB Adult Day Services HCB Senior In-Home Services

1. BASIC INFORMATION

*Name (Last, First, Middle Initial)		*Date Services Began / /	
*Phone Number	Other Phone Number:	*Gender M / F	*DOB / /
*Home Address (Residence)		*Same for Mailing? Yes / No	
*Town		*State	*Zip Code
*Mailing Address (if different than home address)		*State	*Zip Code
*Email:			
Other contact:			
*Consumer's diagnosis category (check which apply): <input type="checkbox"/> ADRD (Alzheimer's or Related Dementia/Disorder) <input type="checkbox"/> Cognitive Impairment <input type="checkbox"/> IDD (Intellectual or Developmental Disability) <input type="checkbox"/> Mental Illness <input type="checkbox"/> Physically Frail (use only if another does NOT apply) <input type="checkbox"/> Traumatic/Acquired Brain Injury			

2. NAPIS

*Ethnicity: Not Hispanic or Latino / Hispanic Latino	*In Poverty? Yes / No	*Lives Alone? Yes / No
*ADLs and IADs: If the consumer needs personal assistance, stand-by assistance, supervision, or cues to perform the following activities, please check the box:		
*Activities of Daily Living (ADLs): <input type="checkbox"/> Eating <input type="checkbox"/> Dressing <input type="checkbox"/> Bathing <input type="checkbox"/> Toileting <input type="checkbox"/> Transferring in/out of bed/chair <input type="checkbox"/> Walking	*Instrumental Activities of Daily Living (IADLs): <input type="checkbox"/> Preparing Meals <input type="checkbox"/> Shopping for personal items <input type="checkbox"/> Managing Medication <input type="checkbox"/> Managing Money <input type="checkbox"/> Doing heavy housework <input type="checkbox"/> Doing Light housework <input type="checkbox"/> Using Telephone <input type="checkbox"/> Using available transportation	
*Consumer's living situation: <input type="checkbox"/> Lives in Assisted Living <input type="checkbox"/> Lives w/under 60 Caregiver <input type="checkbox"/> Lives w/over 60 Caregiver <input type="checkbox"/> Lives w/other 60+ Frail Person		

3. *ETHNIC RACE

<input type="checkbox"/> American Indian/Native Alaskan <input type="checkbox"/> Native Hawaiian/Other Pacific Islander <input type="checkbox"/> White-Hispanic <input type="checkbox"/> Non-Minority (White, non-Hispanic) <input type="checkbox"/> Asian <input type="checkbox"/> Black/African American <input type="checkbox"/> Other <input type="checkbox"/> Missing

Referrals/Notes:
Completed by: _____ Date: _____

SAMS DD & Deaf Navigator Consumer Registration Form

(CONFIDENTIAL INFORMATION – all items/sections marked with * are required)

*CARE ENROLLMENT

Community Developmental Disabilities Grant Short-Term Assistance and Referral Deaf Navigator Program

BASIC INFORMATION

*Name (Last, First, Middle Initial)			*Date Services Began / /
*Phone Number	Other Phone Number:	*Gender M / F	*DOB / /
*Home Address (Residence)			*Same for Mailing? Yes / No
*City	*State		*Zip Code
*Mailing Address (if different than home address)		*State	*Zip Code
*Email:	*IDD DSDS#:	Medicaid Number:	
*CONSUMER DIAGNOSIS CATEGORY:			
<input type="checkbox"/> Autism <input type="checkbox"/> Cerebral Palsy <input type="checkbox"/> IDD <input type="checkbox"/> Seizure Disorder <input type="checkbox"/> Other: _____			
*IDD ELIGIBILITY INFORMATION:			
Date of IDD Eligibility _____ Date of Eligibility Expiration if applicable _____ Date of Reassessment if applicable _____			

OTHER INFORMATION

* Ethnic Race/Background: <input type="checkbox"/> American Indian/Native Alaskan <input type="checkbox"/> Native Hawaiian/Other Pacific Islander <input type="checkbox"/> White-Hispanic <input type="checkbox"/> Non-Minority (White, non-Hispanic) <input type="checkbox"/> Asian <input type="checkbox"/> Black/African American <input type="checkbox"/> Other <input type="checkbox"/> Missing (Unknown)
Services in process or in place: <input type="checkbox"/> SSI/SSDI <input type="checkbox"/> DPA <input type="checkbox"/> Other _____ <input type="checkbox"/> Voc Rehab <input type="checkbox"/> Waiver/PCA <input type="checkbox"/> Other _____

Referrals/Notes:
Completed by: _____ Date: _____

NFCSP SAMS Caregiver Registration and Characteristics Form

(Confidential Information)

1. CAREGIVER BASIC INFORMATION

2. CARE ENROLLMENT- Family Caregiver Support Program

Name (Last, First, Middle Initial)			Date Services Began / /
Phone Number	Additional Phone	Gender M / F	DOB / /
Home Address (Residence)			Same for Mailing? Yes / No
Town		State	Zip Code
Mailing Address (if different than home address)		State	Zip Code
Email:			

3. NAPIS (of Caregiver)

Ethnicity: Not Hispanic or Latino / Hispanic Latino	In Poverty? Yes / No
------------------------------------------------------------	-----------------------------

4. CARE RECIPIENT INFORMATION

Name:	DOB: / /	Gender: M/F
Caregiver's relationship to care recipient?		
<input type="checkbox"/> Wife	<input type="checkbox"/> Daughter/Daughter-in-Law	<input type="checkbox"/> Other Relative
<input type="checkbox"/> Husband	<input type="checkbox"/> Son/Son-in-Law	<input type="checkbox"/> Non Relative

5. CUSTOM FIELDS

a. Care Recipient has? (only use "Physically Frail" when no other applies):

FCS CR ADRD FCS CR Cog Impair FCS CR DD FCS CR Frail Mental Ill FCS CR TBI FCS SVR DIS 19-59

b. Living situation? (choose only one):

FCS Same Residence FCS Same Community FCS Both in AK FCS CG in AK-CR not FCS CR in AK-CG not

6. ETHNIC RACE of Caregiver

<input type="checkbox"/> American Indian/Native Alaskan	<input type="checkbox"/> Native Hawaiian/Other Pacific Islander	<input type="checkbox"/> White-Hispanic
<input type="checkbox"/> Non-Minority (White, non-Hispanic)	<input type="checkbox"/> Asian	<input type="checkbox"/> Black/African American
<input type="checkbox"/> Other <input type="checkbox"/> Missing		

Completed by:

Date:

Consumer Characteristics for Nutrition, Transportation, & Support Services

Please complete this form annually (or sooner, if there has been a change in circumstances) for Registered Services under the Older Americans Act. Data is submitted for Federal Title III funds. Names and identifiers are not submitted. Information is protected by Privacy and Security Agreement. Unauthorized use is strictly prohibited. *Thanks for your help!*

Name: First _____ Initial _____ Last _____

Birth Date _____ Date this form completed _____

Month Day Year Month Day Year

Address _____ No change-check here

Physical _____

Mailing (if different than above) _____

Community _____

State Alaska

Other _____ Zip _____

Phone _____

email _____

Do you live alone? Yes No

Is your income below the Guideline? Yes No

Number in Home	Federal Income Guideline 1.22.14		
	Year	Month	
1	\$14,580	\$1,215	For each additional person with income, add \$ 5,080
2	\$19,660	\$1,638	
3	\$24,740	\$2,062	
4	\$29,820	\$2,485	

Emergency Contact: _____

Phone: _____

Please complete this section for Home Delivered Meals, Assisted Transportation, and/or Homemaker.

If you use personal or stand-by assistance, supervision or cues, to perform the following activities, please check the box.

Activities of Daily Living (ADLs)

- Eating Walking
- Dressing Toileting
- Bathing
- Transferring in/out of bed/chair

Instrumental Activities of Daily Living (IADLs)

- Preparing meals
- Shopping for personal items
- Medication management
- Managing money
- Using telephone
- Doing heavy housework
- Doing light housework
- Using available transportation

Please complete this section for Meals and/or Nutrition Counseling.

Total Score from Determine Your Nutritional Health _____

Please complete this section if using this form for the first time. It is very important for Federal funding.

Gender Female
 Male

Ethnic Race (Check as many as apply)

- Alaskan Native/American Indian
- Asian
- Black/African American
- Native Hawaiian/Pacific Islander
- White

Ethnicity Hispanic or Latino
 Not Hispanic or Latino

For office use: Initials _____ Referrals _____

Site _____

Date _____

Follow up _____ Follow up date _____

The Warning Signs of poor nutritional health are often overlooked. Use this Checklist to find out if you or someone you know is at nutritional risk.

Read the statements below. Circle the number in the “yes” column for those that apply to you or someone you know. For each “yes” answer, score the number in the box. Total your nutritional score.

DETERMINE YOUR NUTRITIONAL HEALTH

	YES
I have an illness or condition that made me change the kind and/or amount of food I eat.	2
I eat fewer than 2 meals per day.	3
I eat few fruits or vegetables or milk products.	2
I have 3 or more drinks of beer, liquor or wine almost every day.	2
I have tooth or mouth problems that make it hard for me to eat.	2
I don't always have enough money to buy the food I need.	4
I eat alone most of the time.	1
I take 3 or more different prescribed or over-the-counter drugs a day.	1
Without wanting to, I have lost or gained 10 pounds in the last 6 months.	2
I am not always physically able to shop, cook and/or feed myself.	2
TOTAL	

Total Your Nutritional Score. If it's –

- 0-2 Good! Recheck your nutritional score in 6 months.
- 3-5 You are at moderate nutritional risk. See what can be done to improve your eating habits and lifestyle. Your office on aging, senior nutrition program, senior citizens center or health department can help. Recheck your nutritional score in 3 months.
- 6 or more You are at high nutritional risk. Bring this Checklist the next time you see your doctor, dietitian or other qualified health or social service professional. Talk with them about any problems you may have. Ask for help to improve your nutritional health.

Remember that Warning Signs suggest risk, but do not represent a diagnosis of any condition. Turn the page to learn more about the Warnings Signs of poor nutritional health.

These materials are developed and distributed by the Nutrition Screening Initiative, a project of:



AMERICAN ACADEMY OF FAMILY PHYSICIANS



THE AMERICAN DIETETIC ASSOCIATION



THE NATIONAL COUNCIL ON THE AGING, INC.



The Nutrition Screening Initiative • 1010 Wisconsin Avenue, NW • Suite 800 • Washington, DC 20007

The Nutrition Screening Initiative is funded in part by a grant from Ross Products Division of Abbott Laboratories, Inc.

The Nutrition Checklist is based on the Warning Signs described below. Use the word **DETERMINE** to remind you of the Warning Signs.

DISEASE

Any disease, illness or chronic condition which causes you to change the way you eat, or makes it hard for you to eat, puts your nutritional health at risk. Four out of five adults have chronic diseases that are affected by diet. Confusion or memory loss that keeps getting worse is estimated to affect one out of five or more of older adults. This can make it hard to remember what, when or if you've eaten. Feeling sad or depressed, which happens to about one in eight older adults, can cause big changes in appetite, digestion, energy level, weight and well-being.

EATING POORLY

Eating too little and eating too much both lead to poor health. Eating the same foods day after day or not eating fruit, vegetables, and milk products daily will also cause poor nutritional health. One in five adults skip meals daily. Only 13% of adults eat the minimum amount of fruit and vegetables needed. One in four older adults drink too much alcohol. Many health problems become worse if you drink more than one or two alcoholic beverages per day.

TOOTH LOSS/MOUTH PAIN

A healthy mouth, teeth and gums are needed to eat. Missing, loose or rotten teeth or dentures which don't fit well, or cause mouth sores, make it hard to eat.

ECONOMIC HARDSHIP

As many as 40% of older Americans have incomes of less than \$6,000 per year. Having less -- or choosing to spend less -- than \$25-30 per week for food makes it very hard to get the foods you need to stay healthy.

REDUCED SOCIAL CONTACT

One-third of all older people live alone. Being with people daily has a positive effect on morale, well-being and eating.

MULTIPLE MEDICINES

Many older Americans must take medicines for health problems. Almost half of older Americans take multiple medicines daily. Growing old may change the way we respond to drugs. The more medicines you take, the greater the chance for side effects such as increased or decreased appetite, change in taste, constipation, weakness, drowsiness, diarrhea, nausea, and others. Vitamins or minerals, when taken in large doses, act like drugs and can cause harm. Alert your doctor to everything you take.

INVOLUNTARY WEIGHT LOSS/GAIN

Losing or gaining a lot of weight when you are not trying to do so is an important warning sign that must not be ignored. Being overweight or underweight also increases your chance of poor health.

NEEDS ASSISTANCE IN SELF CARE

Although most older people are able to eat, one of every five have trouble walking, shopping, buying and cooking food, especially as they get older.

ELDER YEARS ABOVE AGE 80

Most older people lead full and productive lives. But as age increases, risk of frailty and health problems increase. Checking your nutritional health regularly makes good sense.



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